Annex 3: Media Literacy Audit

Report on UK adults by platform

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Section 1

Ownership

This section looks at take-up of the five key media covered by the Media Literacy Audit (digital television, digital radio, internet, mobile phones and games consoles) and the extent to which multiple media are owned by adults in the UK.

1.1 Summary

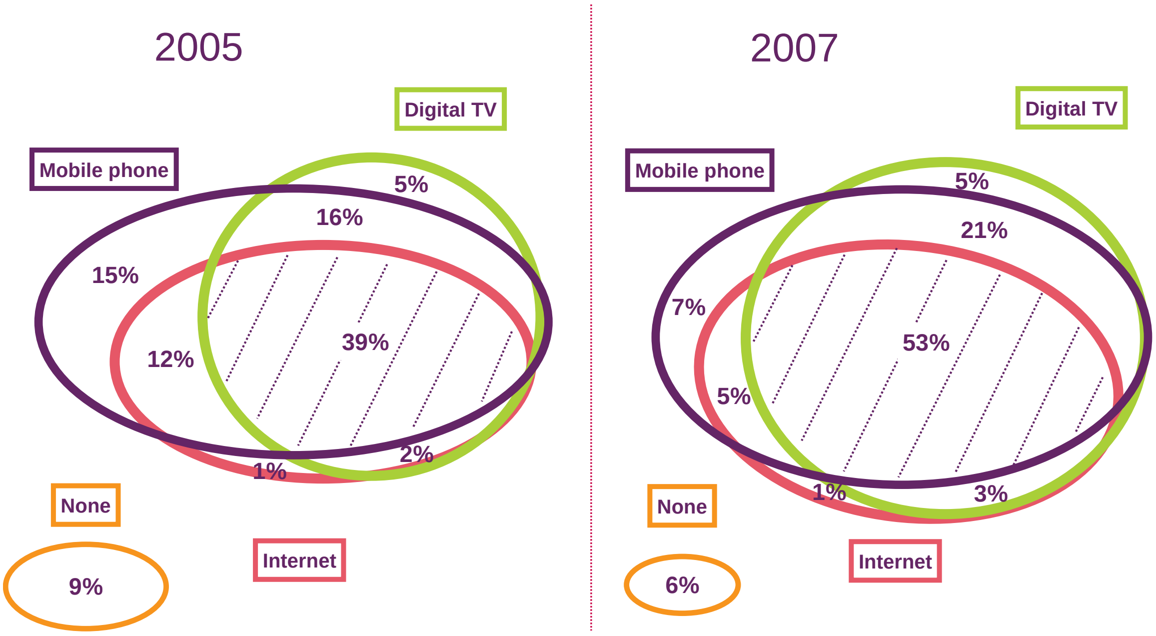
Over half (53%) of all UK adults now have digital television, a mobile phone and the internet at home; a significant increase since 2005 (39%). Adults aged 16-19 and 35-44, those in AB households, and those with children in the household are the most likely to own all three of these media. Those aged 65 and over or those in DE households are the least likely to own all three of these media, although ownership of each of the three declines for adults aged 45 and over.

Since 2005 digital television has had the greatest increase in ownership (up 20%), but there have also been significant increases in take-up of the internet (up 8%) and mobile phones (up 3%). The greatest increase in take-up of digital television (up 29%) and the internet (up 15%) has been by adults aged 20-24.

1.2 Ownership of digital television, mobile phones and the internet

Figure 1 illustrates the extent to which digital television, the internet and mobile phones are owned by adults in the UK, and how the findings from the 2005 Media Literacy Audit (on the left) differ from the 2007 Media Literacy Audit findings (on the right). The shapes within Figure 1 illustrate the extent to which each of digital television, the internet and mobile phones are owned on their own, as a pair, or where all three are owned.

Figure 1: Extent of multiple-platform ownership of digital television, mobile phone and internet

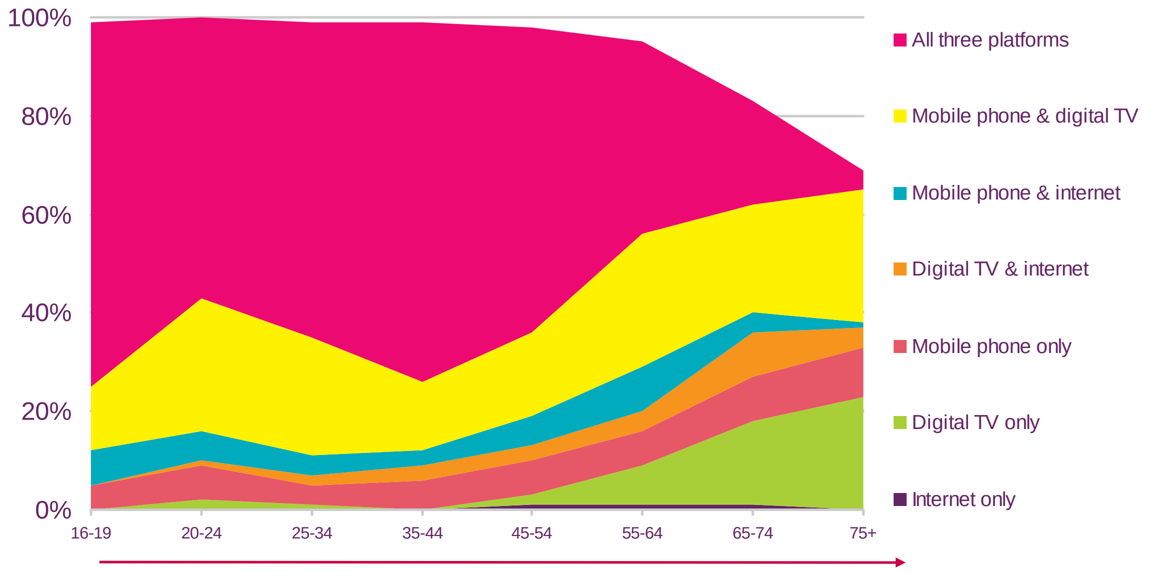


T1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?/ Does anyone in your household have access to the internet at home through a computer or laptop?/ Do you personally use a mobile phone?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The proportion of UK adults owning all three media (digital television, mobile phone and the internet) has increased significantly since 2005 to account for over half of all UK adults; from 39% to 53%. At the same time, the proportion of UK adults who do not own any of these media has decreased by 3%; from 9% to 6%.

Figure 2 shows the extent of multiple-platform ownership of digital television, mobile phone and the internet across eight age bands, aged from16-19 up to 75 and over. The gap below the horizontal line indicating 100% at the top of Figure 2 indicates the proportion of adults in each age band that do not own either digital television, a mobile phone or the internet.

Figure 2: Multiple platform ownership of digital television, mobile phone and internet, by age



T1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?/ Does anyone in your household have access to the internet at home through a computer or laptop?/ Do you personally use a mobile phone?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The proportion of adults with none of these media (digital television, internet or mobile phone) is very low across each of the age groups from 16-19 (1% own none of these) to 55-64 (5% own none). This proportion increases significantly for the two oldest age groups: 65-74 (18% own none) and 75 and over (30% own none).

Two age groups stand out in terms of a higher proportion owning all three; 16-19 year olds (74% own all three) and 35-44 year olds (73% own all three). The lower proportion of those aged 20-24 and 25-34 owning all three media suggests that the 16-19 year old group gain higher multiple platform ownership through living with their parents. The internet is the missing media for those aged from 20-34, compared to those in the age groups immediately below and above.

Table 1 shows the extent of multiple platform ownership of digital television, internet and mobile phone for other key demographic groups, where findings differ significantly.

Table 1: Multiple platform ownership digital television, mobile phone and internet, by key demographic groups

	All 3 platforms	Mobile phone & digital television	Mobile phone & internet	Digital television & internet	Mobile phone only	Digital television only	Internet only	None of these
	%	%	%	%	%	%	%	%
All adults aged 16+ (2905)	53	21	5	3	7	5	1	6
AB (552)	74	9	5	2	2	5	1	3
C1 (836)	60	17	6	5	6	3	*	3
C2 (605)	51	25	4	1	5	7	1	5
DE (897)	27	33	4	4	12	8	*	11
Children in household (1481)	65	20	4	3	5	2	*	2
No children in household (1306)	40	21	6	4	9	9	1	10
Urban (2208)	52	21	5	3	6	6	1	6
Rural (697)	58	15	5	2	8	5	*	5
Visual impairment (131)	28	19	2	4	8	15	1	24
Hearing impairment (116)	29	12	4	4	6	27	0	18
Mobility impairment (230)	24	28	4	6	6	16	1	16

T1/ IN1/ M1 – Can any of your television sets receive additional channels other than BBC, ITV, Channel 4 and (where available) Channel 5?/ Does anyone in your household have access to the internet at home through a computer or laptop?/ Do you personally use a mobile phone?
Base: All adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Adults in socio-economic groups AB and C1 are more likely than adults as a whole to own digital television, mobile phone and the internet. Adults in socio-economic group DE are more likely to own none of these media.

Adults in households with children are more likely to own all three, while those with no children in the household are more likely to own none of these media.

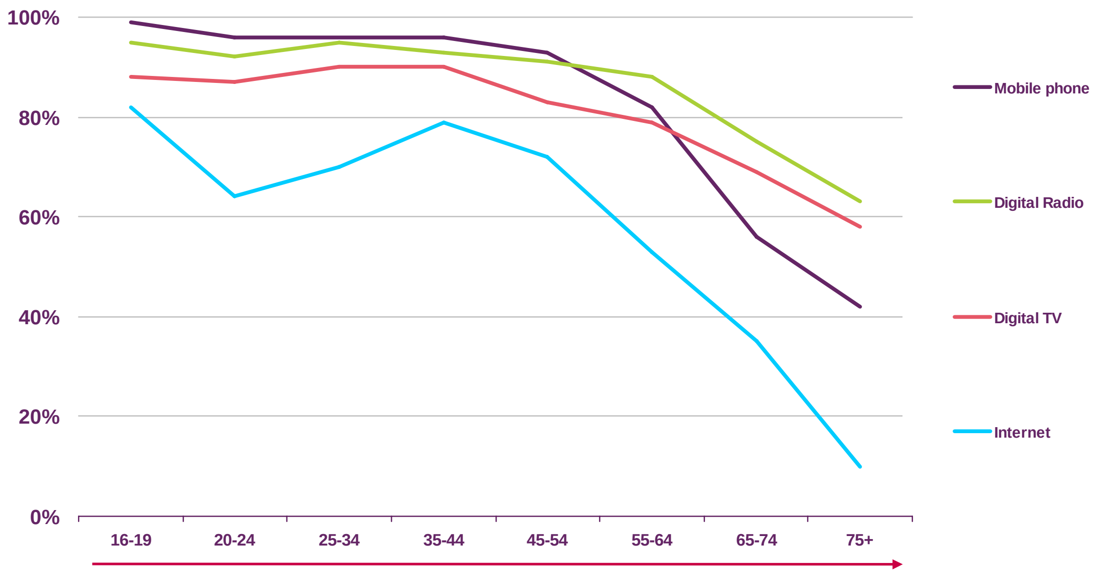
Adults in rural areas of the UK are more likely than those in urban areas to own all three media devices.

Adults with either a visual, hearing or mobility impairment are more likely to own none of these media compared with others.

1.3 Household ownership of media platforms

In addition to these three media, we can also assess the extent to which adults in the UK have access to digital radio; either through having digital television or the internet, or through having a DAB radio set. Figure 3 shows ownership of these four media platforms across the eight age bands, from 16-19 to 75 and over.

Figure 3: Ownership of mobile phone, digital radio[1], digital television and internet, by age



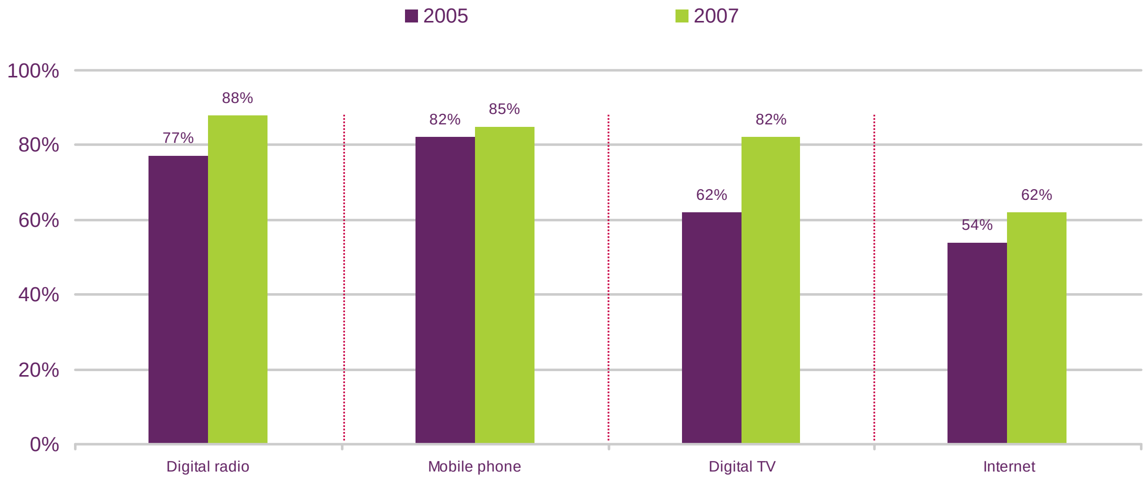
T1/ R1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?/ In which of these ways do you ever listen to radio in your home?/ Does anyone in your household have access to the internet at home through a computer or laptop?/ Do you personally use a mobile phone?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Ownership levels for each of these media decline for adults aged 45 and over, with the most obvious declines being for mobile phone and internet ownership. If we exclude digital radio from these measures (given that ownership of digital radio platforms is impacted by digital television and the internet), we can see that while the mobile phone is the most-owned device up to age 64, digital television takes over as the most-owned device for those aged 65 and over.

Figure 4 shows levels of ownership for the four key media across all UK adults, comparing the 2005 and 2007 Media Literacy Audits.

[1] Ownership of digital radio is a composite measure which combines ownership of digital television, internet or DAB digital radio. This measure is for potential take-up only, it does not measure who is actually listening to digital radio. Listenership is covered in Section 6

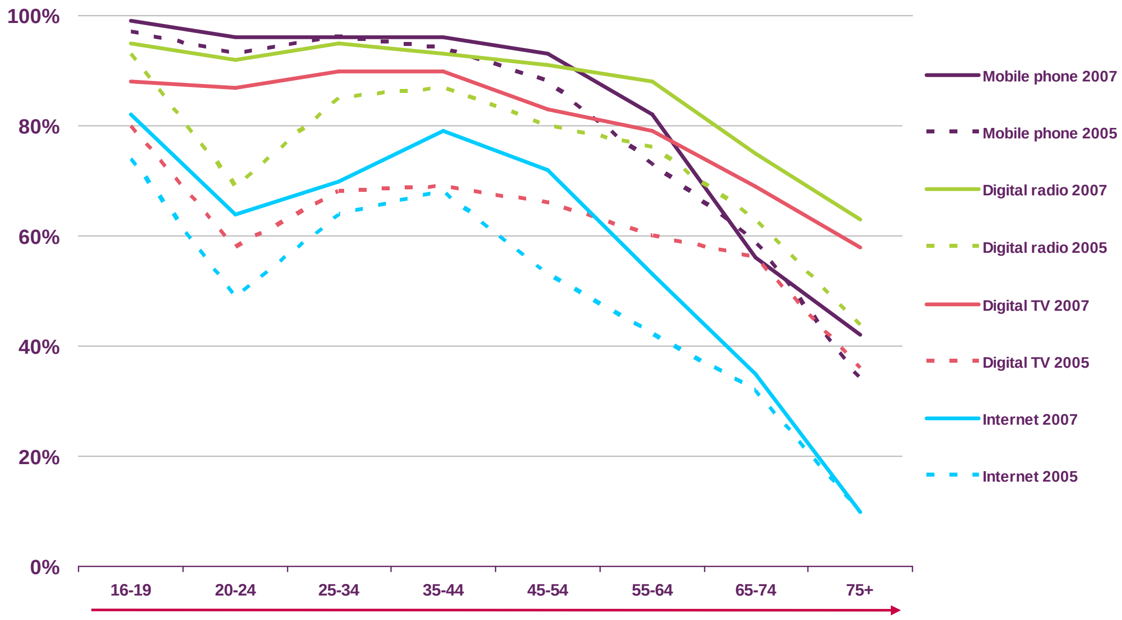
Figure 4: Ownership of digital radio, mobile phone, digital television and internet, 2005 and 2007



T1/ R1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?/ In which of these ways do you ever listen to radio in your home?/ Does anyone in your household have access to the internet at home through a computer or laptop?/ Do you personally use a mobile phone?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Across all UK adults, ownership of each of these four media has increased significantly since 2005. The greatest increase is in digital television ownership; up from 62% to 82%. Ownership of the internet has increased from 54% to 62% of UK adults. Mobile phone ownership has increased by 3%. Figure 5 shows the levels of ownership of mobile phone, digital television, the internet and access to digital radio platforms in 2005 (dashed lines) and in 2007 (solid lines) for each of the age groups.

Figure 5: Ownership of mobile phone, digital television and internet, 2005 and 2007, by age



T1/ R1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?/ In which of these ways do you ever listen to radio in your home?/ Does anyone in your household have access to the internet at home through a computer or laptop?/ Do you personally use a mobile phone?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Ownership of digital television has increased by more than the UK average of 20% among 20-24 year olds (up from 58% to 87%).

Ownership of the internet has increased by more than the UK average of 8% among 20-24 year olds (up from 49% to 64%) and 45-54 year olds (up from 53% to 72%).

Ownership of a mobile phone has increased by more than the UK average of 3% among 55-64 year olds (up from 73% to 82%) and aged 75 and over (up from 34% to 42%).

Access to a digital radio platform has increased by more than the UK average of 11% among 20-24 year olds (up from 69% to 92%) and aged 75 and over (up from 44% to 63%).

Table 2 shows the 2007 levels of ownership of mobile phones, digital television and the internet among key demographic groups, where findings differ significantly.

Table 2: Ownership of mobile phone, digital television and internet, by key demographic groups

	Mobile phone	Digital TV	Internet
	%	%	%
All adults aged 16+ (2905)	85	82	62
AB (552)	90	89	82
C1 (836)	90	85	72
C2 (605)	86	85	57
DE (897)	76	72	35
Children in household (1481)	93	89	72
No children in household (1306)	77	75	51
Urban (2208)	85	83	61
Rural (697)	87	81	66
Visual impairment (131)	57	66	34
Hearing impairment (116)	52	72	37
Mobility impairment (230)	61	73	34

T1/ IN1/ M1 – Can any of your television sets receive additional channels other than BBC, ITV, Channel 4 and (where available) Channel 5?/ Does anyone in your household have access to the internet at home through a computer or laptop?/ Do you personally use a mobile phone?
Base: All adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Adults in socio-economic group AB are more likely than adults as a whole to own each of the three; a mobile phone, digital television and the internet. Those in socio-economic group C1 are more likely to own each of mobile phone and the internet, but not digital television. Adults in socio-economic group DE are less likely to own each of mobile phone, digital television and the internet.

Adults in households with no children are less likely than those in households with children to own each of mobile phone, digital television and the internet.

Adults with either a visual, hearing or mobility impairment are less likely to own each of mobile phone, digital television and the internet.

While ownership does not differ for mobile phone and digital television, those living in rural areas are more likely than those in urban areas to have the internet.

Section 2

Television

This section looks at television in detail; covering issues such as take-up of the various digital television services, the main reason for watching television, other media used at the same time as watching television, interest in and confidence with digital television and DVR functions among owners, trust in television content, attitudes towards television, belief in types of television programmes, understanding sources of funding, regulation and the television watershed, and concerns about what is on television.

2.1 Summary

Take-up of digital television has increased since 2005 (from 62% to 82%), in particular among those aged 20-24, C1 households and those in rural areas.

Two in three adults ever use other media while watching television, most commonly talking on a phone. The incidence of using another device while watching television decreases with age, and is less common among those aged 65 and over, those in DE households, and those with no children in the household.

Interest in digital television and DVR (digital video recorder) functions is lower among digital television owners aged 55 and over, those with no children in the household and those in DE households. Those who are interested are mostly confident with using the functions.

Television is seen as having a role in providing both entertainment and education. Similarly, adults are as likely to feel that television content should be free to be expressive and creative as they are to feel that television viewers should be protected from inappropriate or offensive content. Among older adults (aged 65 and over), protection outweighs freedom of expression.

One in three adults disagree that they *tend to trust what they see when they watch television*, and this is more evident for those aged 45 and over, females and those in AB or C1 households.

However, when we specifically asked about people's views on news and factual programming, those who watch television news and factual programming are more likely to believe most of what is shown than to be sceptical about the information. Scepticism is higher for males and those with no children in the household. Among those watching reality TV who believe a lot of the action is made up for the cameras, more find this entertaining than find it wrong, although older adults are more likely to find this wrong.

Although most adults are aware of how BBC TV programmes (80%) and commercial TV programmes (70%) are funded, awareness has decreased since 2005. Awareness of funding is lower for younger adults aged under 35, females and those in DE households. A majority of adults (60%) believe *that it doesn't matter who owns television channels or how they are funded, so long as they provide good programmes*.

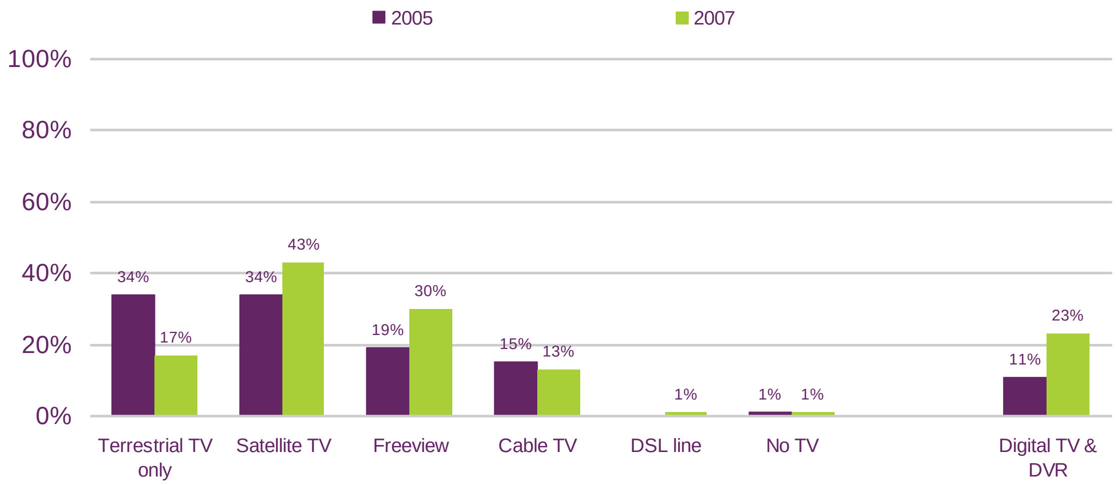
Most adults (79%) believe that television programmes are regulated, with no change since 2005, but those aged under 25, aged 75 or over, females and those in DE households are less sure. Knowledge of the television watershed has decreased since 2005, and is lower for under-25s, those in DE households and those with no children in the household.

Concern about what is on television increases with age; rising from one in four under-25s to three in four aged 75 and over. Concerns are equally likely to relate to poor quality content as to offensive content. Females are most likely to be concerned about offensive content, while males and those in AB households are most likely to be concerned about poor quality content.

2.2 Take-up of digital television services

Figure 6 shows the take-up of digital television (whether through satellite, Freeview or cable) along with those with terrestrial television only, or with no television in the household. Those who have digital television and a digital video recorder (DVR) are also shown in Figure 6. Findings from the 2005 and 2007 Media Literacy Audit are shown alongside each other for comparison.

Figure 6: Take-up of digital television services, 2005 and 2007



T1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Take-up of both satellite television (up 9%) and Freeview (up 11%) has increased significantly since 2005, with terrestrial television only (those without digital television) decreasing as a result (down 17%).

As detailed in the main report, take-up of digital television has increased by more than the UK average for those aged 20-24. Across other demographic groups the increase since 2005 is also higher for those in the C1 socio-economic group and those in rural areas.

Take-up of DVRs has also risen significantly since 2005; from 11% to 23% of all UK households. Since the 2005 Media Literacy Audit, DVRs have become available to those with Freeview and cable services. However, the majority (78%) of those with a DVR are still those with a satellite television service.

Take-up of DVRs has increased by more than the UK average since 2005 among those in the AB socio-economic group and those who are working.

2.3 Non-ownership of digital television

According to what people say we expect take-up of digital television to continue increasing, as 27% of those who do not have a digital television say they intend to get it in the next 12 months, an increase from 15% in 2005 (see Figure 7).

Of the people who do not have multichannel television the percentage who say they do not have multichannel television due to affordability issues has decreased from 37% in 2005 to 12% in 2007. Freeview has helped to drive the increase in multichannel television ownership and has likely contributed significantly to reducing the barrier of affordability for some people. However, over the same time period there has been an increase in those who see no need to switch from analogue to digital or are happy with their current analogue service.

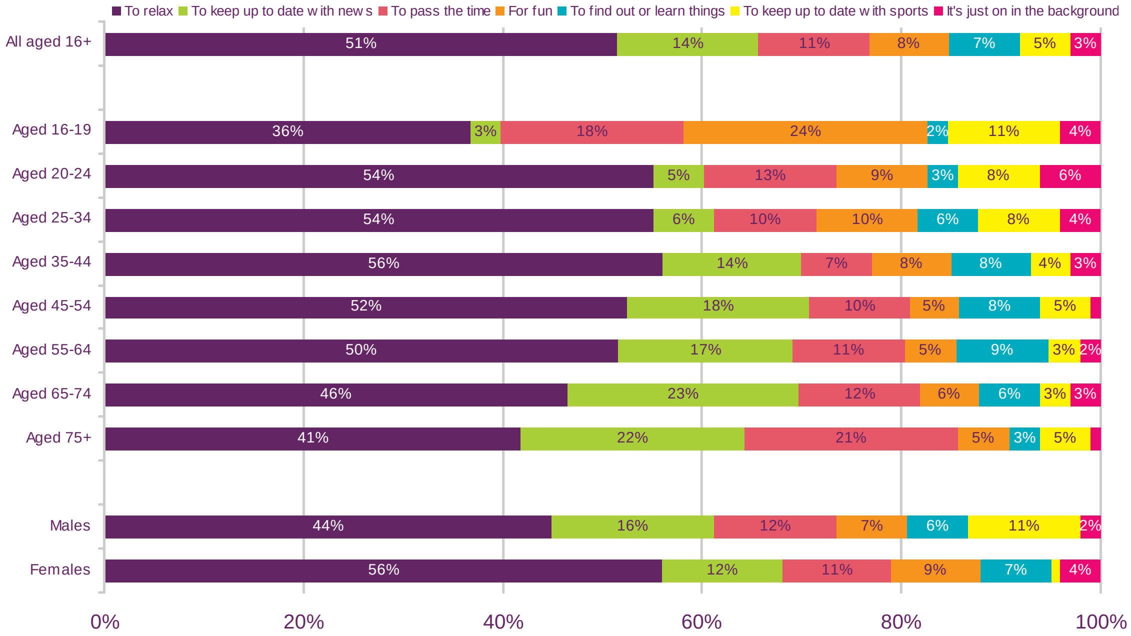
Figure 7: Non-ownership of digital television

Various – Can you tell me if you intend to get digital television/internet access/mobile phone at home in the next year or so?/ And can you tell me why that is?
Base: All adults aged 16+ who do not have digital television (n=795)
Source: Ofcom communications tracking survey Q3 and Q4 2007

2.4 Main reason for watching television

All adults with a television in the household (99%) were prompted with a list of possible reasons for watching television and were asked to say which, if any, were relevant for them. Having made this selection, they were then asked to choose the one main reason from the list. Figure 8 shows the main reason given by all adults, those in each age group, and by males and females.

Figure 8: Main reason for watching television, by age and gender



T20 – Which one is your main reason for watching TV?
Base: Adults aged 16+ with a TV in the household (2887 aged 16+, 203 aged 16-19, 205 aged 20-24, 471 aged 25-34, 657 aged 35-44, 488 aged 45-54, 336 aged 55-64, 355 aged 65-74, 167 aged 75+, 1358 males, 1529 females)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

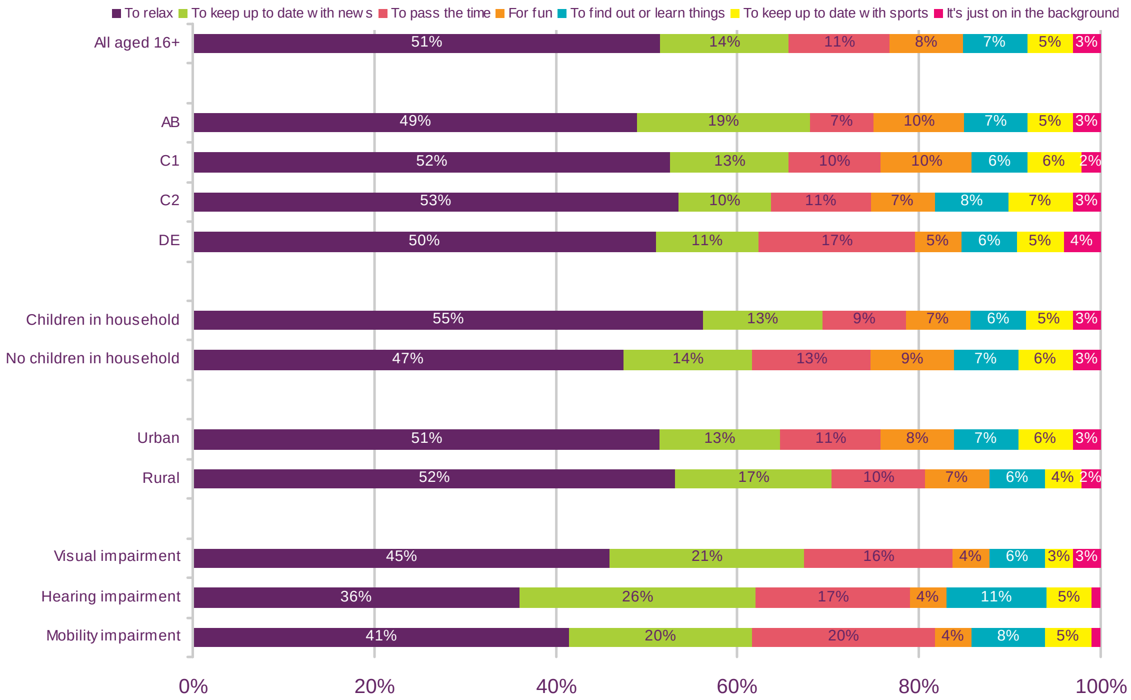
While half (51%) of all adults with a television in the household choose *to relax* as their main reason for watching television, this is less likely to be chosen as the main reason by the youngest (aged 16-19) and oldest (aged 75 and over) adults, while still being the most common main reason chosen.

The youngest and oldest adults are more likely than adults as a whole to choose *to pass the time* as their main reason for watching television, but otherwise their responses differ significantly from each other. One in four of the youngest adults, aged 16-19, choose *fun* as their main reason for watching television, but this reason drops to one in ten of 20-24s and one in twenty of those aged 45 and over. One in five adults aged 65 and over choose *keeping up to date with news* as their main reason for watching television, but this reason drops to one in twenty for those aged 25 and under.

The main reason for watching television also varies by gender. Males are more likely to choose *keeping up to date with news* and *keeping up to date with sports* as their main reason for watching television. Females are more likely to choose *to relax*.

Figure 9 shows the main reason for watching television given by adults in the other key demographic groups, where findings differ significantly.

Figure 9: Main reason for watching television, by key demographic groups



T20 – Which one is your main reason for watching TV?
Base: Adults aged 16+ with a TV in the household (2887 aged 16+, 549 AB, 830 C1, 603 C2, 890 DE, 2193 Urban, 694 Rural, 131 Visual disability, 116 Hearing disability, 229 Mobility disability)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Adults in AB households are more likely than adults in general to choose *keeping up to date with news* as their main reason for watching television. Adults in DE households are more likely to choose *passing the time* as their main reason for watching television.

Those with children in the household are more likely than those without children to choose *to relax* as their main reason for watching television. Those without children in the household are more likely to choose *passing the time* as their main reason for watching television.

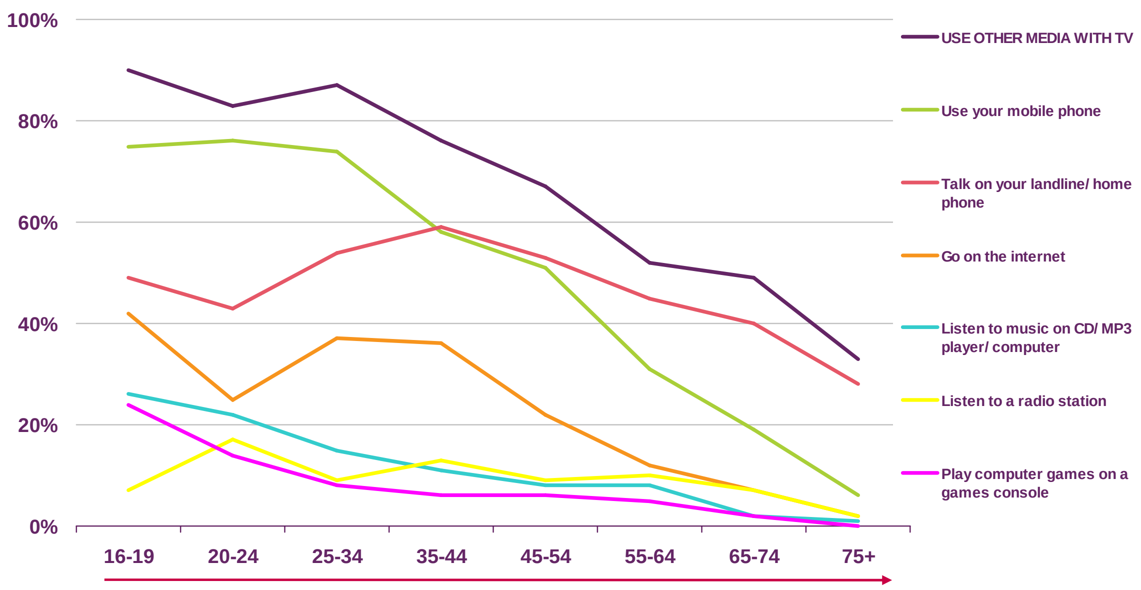
Those in urban and rural areas differ only in terms of those in rural areas being more likely to choose *keeping up to date with news* as their main reason for watching television.

Those with a visual, hearing or mobility impairment are more likely than all adults to choose *keeping up to date with news* as their main reason for watching television. Those with a hearing or mobility impairment are more likely to choose *passing the time* as their main reason for watching television.

2.5 Using other media while watching television

All adults with a television in the household (99%) were prompted with a list of six other media activities and were asked whether they ever watch television and do any of these other activities at the same time. Figure 10 shows the proportion of adults in each age group who watch television and carry out each of the other media activities at the same time, either most times, or sometimes, when they watch television.

Figure 10: Using other media while watching television, by age



T3A-F – Do you ever watch TV at home and do these other things at the same time? Is that most times or sometimes when you watch TV?
Base: Adults aged 16+ with any TVs (2887 aged 16+, 203 aged 16-19, 205 aged 20-24, 471 aged 25-34, 657 aged 35-44, 488 aged 45-54, 336 aged 55-64, 355 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

It is clear from Figure 10 that using other media while watching television is most common for the youngest adults and least common for the oldest adults. To some extent this will be related to lower ownership of other media among older people. However, the levels of ownership of media such as mobile phones and the internet, shown in Figure 3, do not decline across each age group to the extent shown in Figure 10, so we must conclude that age is a factor in itself.

Not only are younger people more likely than older people to use other media while watching television, they are also using a broader range of other media.

Figure 11 shows the incidence of using other media while watching television for the other key demographic groups, where findings differ significantly. The additional media ever used at the same time as television have been stacked alongside each other to give an indication of the breadth of use of other media. In addition, a dotted vertical line is shown to mark the breadth of use of other media for all adults.

Figure 11: Using other media while watching television, by key demographic groups

T3A-F – Do you ever watch TV at home and do these other things at the same time? Is that most times or sometimes when you watch TV?
Base: Adults aged 16+ with a TV in the household (2887 aged 16+, 1358 Males, 1529 Females, 549 AB, 830 C1, 603 C2, 890 DE, 1477 Children in household, 1293 No children in household, 2193 Urban, 694 Rural, 131 Visual disability, 116 Hearing disability, 229 Mobility disability)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

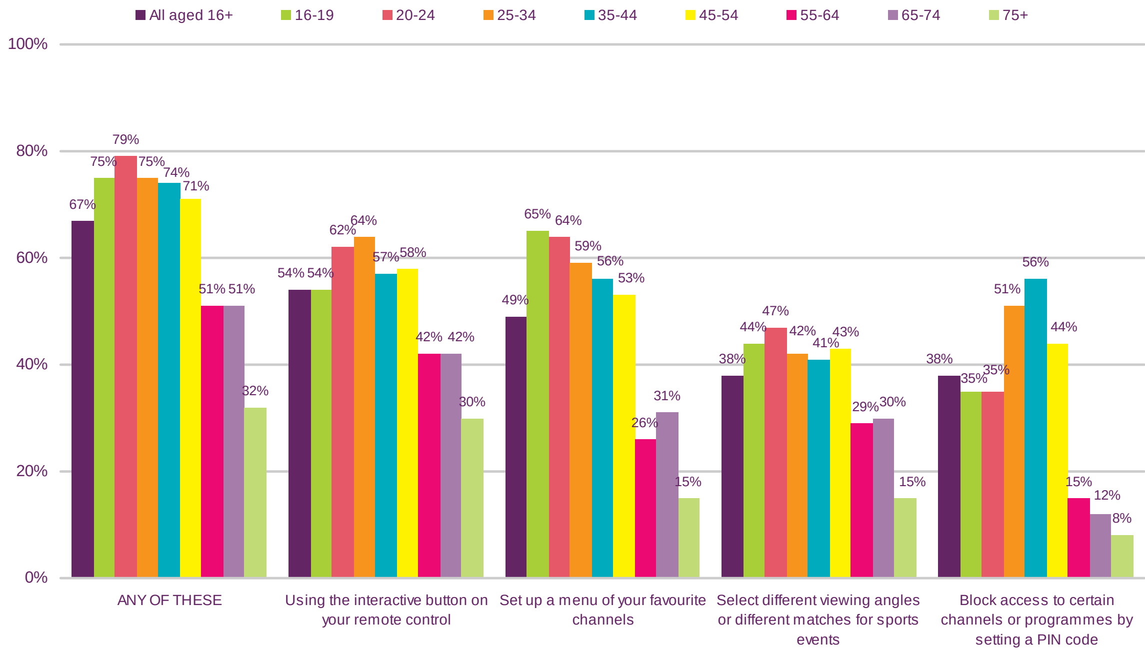
Overall, adults in DE socio-economic group households, those with no children in the household and people with a visual, hearing or mobility impairment are less likely than adults as a whole to use other media while watching television. There are also variations in the type of media used; these are listed below:

- males are more likely to play games on a games console while watching television;
- females are more likely to talk on a landline/ home phone while watching television;
- adults in AB households are more likely than adults as a whole to talk on a landline/ home phone and to use the internet while watching television;
- those living in urban areas are more likely to go on the internet while watching television; and
- those living in rural areas are more likely to listen to a radio station while watching television.

2.6 Interest in digital television functions

Those with a digital television service at home (82% of all UK adults) were prompted with four functions available through digital television. For each function they were asked to say if this was something they were interested in. Figure 12 shows the responses from all with a digital television service. The functions are shown in order of interest, by age group.

Figure 12: Interest in digital television functions among digital television owners, by age



T4 – I'm going to read out some different types of things you can do with some types of digital television, and for each one I'd like you to say which of the options on the card applies to you
Base: All adults aged 16+ with digital TV (2351 aged 16+, 175 aged 16-19, 177 aged 20-24, 417 aged 25-34, 572 aged 35-44, 400 aged 45-54, 268 aged 55-64, 241 aged 65-74, 96 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Two in three digital television owners are interested in at least one of the four functions, with interest levels above the average for those aged 16-44 and below the average for those aged 55 and over. Interest among digital television owners aged 75 and over is markedly lower. Twenty-two per cent of all digital television owners are interested in all four of these functions, and interest is significantly higher for those aged 25-34 (31%) and those aged 35-44 (32%).

Two of the digital television functions are of interest to around half of all digital television owners: using the interactive button on the remote control and setting up a menu of favourite channels. The other functions are of interest to a minority of digital television owners. The peak in interest among those aged 25-44 in the function to block access to certain channels or programmes by setting a PIN code reflects the higher incidence of young children in these households. This is also reflected in the much lower interest in this function among digital television owners aged 55 and over, who are less likely to have young children in the house.

Table 3 shows the level of interest across the four digital television functions, both overall and individually, among the other key demographic groups, where findings differ significantly.

Table 3: Interest in digital television functions among digital television owners, by key demographic groups

	ANY OF THESE	Using the interactive button on your remote control	Set up a menu of your favourite channels	Select different viewing angles or difference matches for sports events	Block access to certain channels or programmes by setting a PIN code
	%	%	%	%	%
All adults aged 16+ (2351)	67	54	49	38	38
Males (1113)	69	59	51	50	35
Females (1238)	65	50	47	28	40
AB (478)	70	57	51	40	39
C1 (701)	71	58	53	43	41
C2 (510)	65	51	49	41	40
DE (651)	60	49	42	29	30
Children in household (1294)	71	57	53	40	50
No children in household (956)	62	50	44	36	23
Urban (1797)	67	55	49	39	37
Rural (554)	67	51	47	34	40
Visual impairment (94)	57	39	39	20	28
Hearing impairment (86)	49	34	27	14	12
Mobility impairment (173)	54	44	34	26	20

T4 – I'm going to read out some different types of things you can do with some types of digital television, and for each one I'd like you to say which of the options on the card applies to you.
Base: All adults aged 16+ with digital television
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Males are more likely to be interested in any of the four digital television functions, especially two of the functions: using the interactive button on the remote control, and selecting different viewing angles or different matches for sports events. While females have a lower level of interest in these functions overall, they are more likely to be interested in the function to block access to certain channels or programmes by setting a PIN code.

Compared to all adults with digital television, those in socio-economic groups AB and C1 are more interested in the digital television functions at an overall level. Adults in socio-economic group C1 are more likely than adults as a whole to be interested in selecting different viewing angles or different matches for sports events.

Those with children in the household are more likely than those without children to be interested in the digital television functions at an overall level, and especially the function to block access to certain channels or programmes by setting a PIN code.

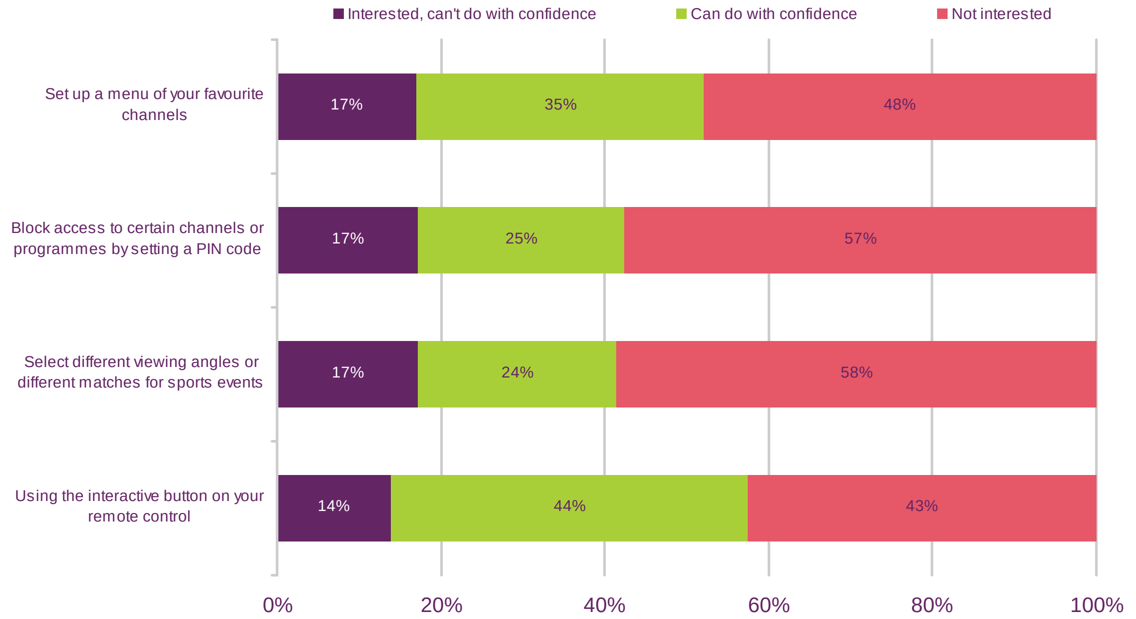
While those in urban and in rural areas do not differ in terms of their overall level of interest in digital television functions, those in urban areas are more interested in the function to select different viewing angles or different matches for sports events.

Those with either a visual, hearing or mobility impairment are less likely than adults as a whole to be interested in the digital television functions.

2.7 Confidence with digital television functions

Those digital television owners interested in particular functions were then asked to say whether they could do the task with confidence. Figure 13 splits all digital television owners into one of three groups for each of the four functions: those who are not interested, those who are interested and can do it with confidence, and those who are interested but cannot do it with confidence. This gap in confidence, shown on the far left of Figure 13, is of particular interest in assessing media literacy, and is shown in rank order.

Figure 13: Confidence with digital television functions among digital television owners



T4 – I'm going to read out some different types of things you can do with some types of digital television, and for each one I'd like you to say which of the options on the card applies to you
Base: All adults aged 16+ with multichannel TV (2351)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The confidence gap is at similar levels for the first three digital television functions in Figure 13, with nearly one in five digital television owners interested but not able to do the task with confidence. Among those who are interested, a higher proportion are not confident either in selecting different viewing angles or different matches for sports events, or in blocking access to certain channels or programmes by setting a PIN code than confidence with other functions.

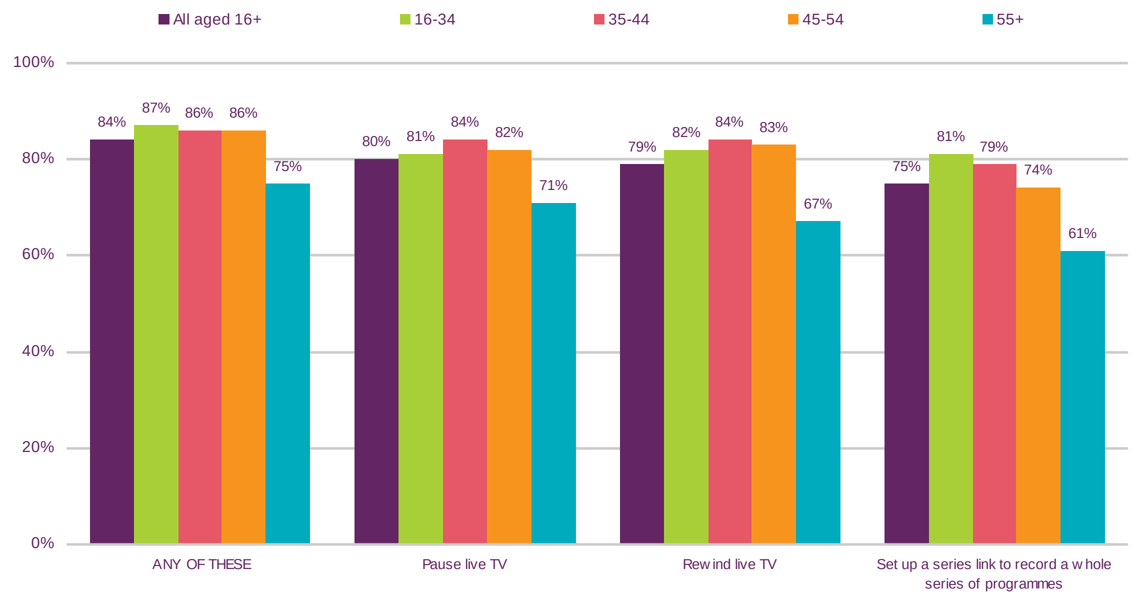
The confidence gap among demographic groups is more apparent where interest is higher. Levels of interest in digital television functions are lower among older adults (over 65s), those in DE households, those with no children in the household and those with an impairment. Among these groups there are few significant differences in terms of the size of the confidence gap.

Females and those aged 35-44 are more likely to say that they cannot block access to certain channels or programmes by setting a PIN code. Males are more likely to say they cannot select different viewing angles or different matches for sports events with confidence, mainly because they are more likely to be interested in doing this.

2.8 Interest in DVR functions

Those with a digital video recorder/ DVR (23%) were prompted with three functions available using a DVR. For each function they were asked to say if this was something they were interested in. Figure 14 shows the responses from all with a DVR, as well as those in each age group. Please note that the younger (aged 16-34) and older (aged 55+) age groups have been broadened in order to report on a more robust sample. The functions are shown in rank order of interest, across all adults with a DVR.

Figure 14: Interest in DVR functions among DVR owners, by age



T6/ T7 – I'm going to read out some different types of things you can do with a TV recorder that is built-in to a digital TV service, and for each one I'd like you to say which of the options on the card applies to you
Base: All adults aged 16+ with a DVR (573 aged 16+, 178 aged 16-34, 165 aged 35-44, 114 aged 45-54, 113 aged 55+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Four in five DVR owners are interested in at least one of the three functions we asked about, with interest levels below the average for those aged 55 and over. Interest in all three of these functions stands at 71% of all DVR owners, and is significantly lower for those aged 55 and over (57%). Unlike the digital television functions, therefore, those interested in any of the DVR functions tend to be interested in all of them. The lower level of interest among older DVR owners suggests that some of these older adults are more likely than younger adults to be using the DVR as a straight replacement for a VCR.

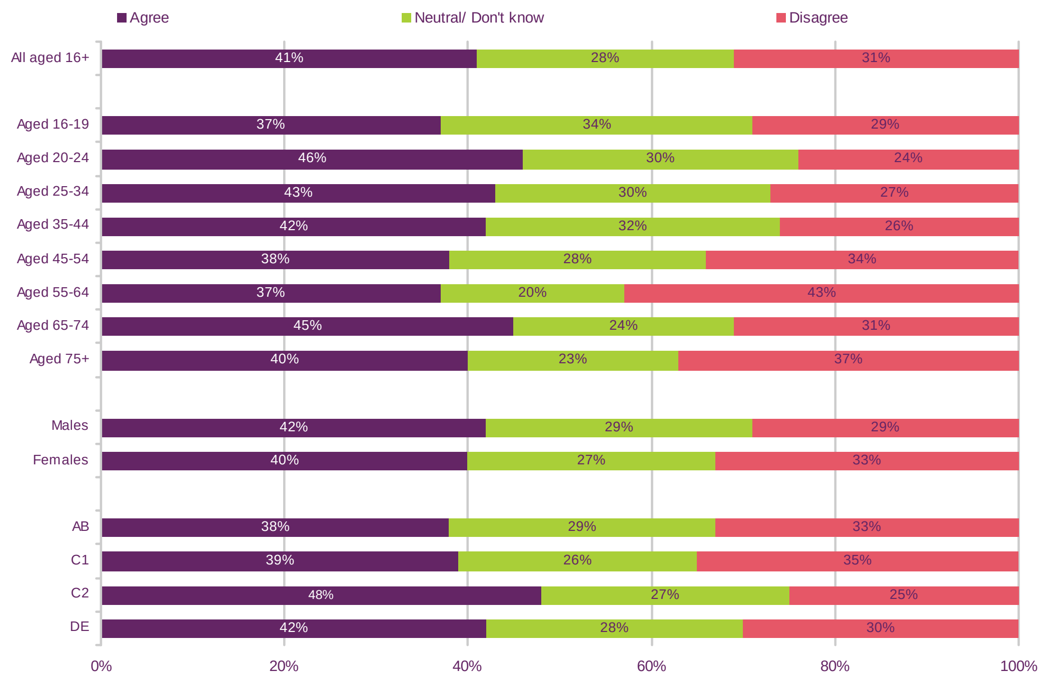
Interest in DVR functions does not vary by gender, household socio-economic group, or those living in urban or rural areas. The lower level of interest among older DVR owners is also reflected in a lower level of interest among those with no children in the household.

The confidence gaps seen for digital television functions are not apparent for the DVR functions, with a higher proportion of DVR owners saying that they can do each of these tasks with confidence. This is not surprising, as DVR owners are likely to adopt technology earlier than people as a whole who own digital televisions.

2.9 Trust in television content

Adults with any televisions in the household were asked to indicate the extent to which they agree or disagree with the statement *When I watch television, I tend to trust what I see*. This statement encompasses all content viewed by the respondent on television and therefore, does not address different genres and service providers. Figure 15 shows responses from all adults with any televisions in the household, by age group, by gender and socio-economic group.

Figure 15: Trust in television content, by demographic groups



T17D – *When I watch TV I tend to trust what I see*
Base: All adults aged 16+ who have a TV (2887 aged 16+, 203 aged 16-19, 205 aged 20-24, 471 aged 25-34, 657 aged 35-44, 488 aged 45-54, 336 aged 55-64, 355 aged 65-74 167 aged 75+ , 1358 males, 1529 females, 549 AB, 830 C1, 603 C2, 890 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Across all adults with any televisions in the household, two in five agree that *they trust what they see on television*, and over a quarter say that they neither agree nor disagree with this statement. One in three disagree that *they tend to trust what they see*. This is more common among those aged 55-64, females and those in C1 socio-economic group households. In contrast, C2 adults are more likely than all adults to agree with this statement.

Genres shown on television differ significantly from cartoons to drama, reality television to news and factual programmes and therefore we would expect perception of trust to differ by the genre's people watch.

2.10 The role of television

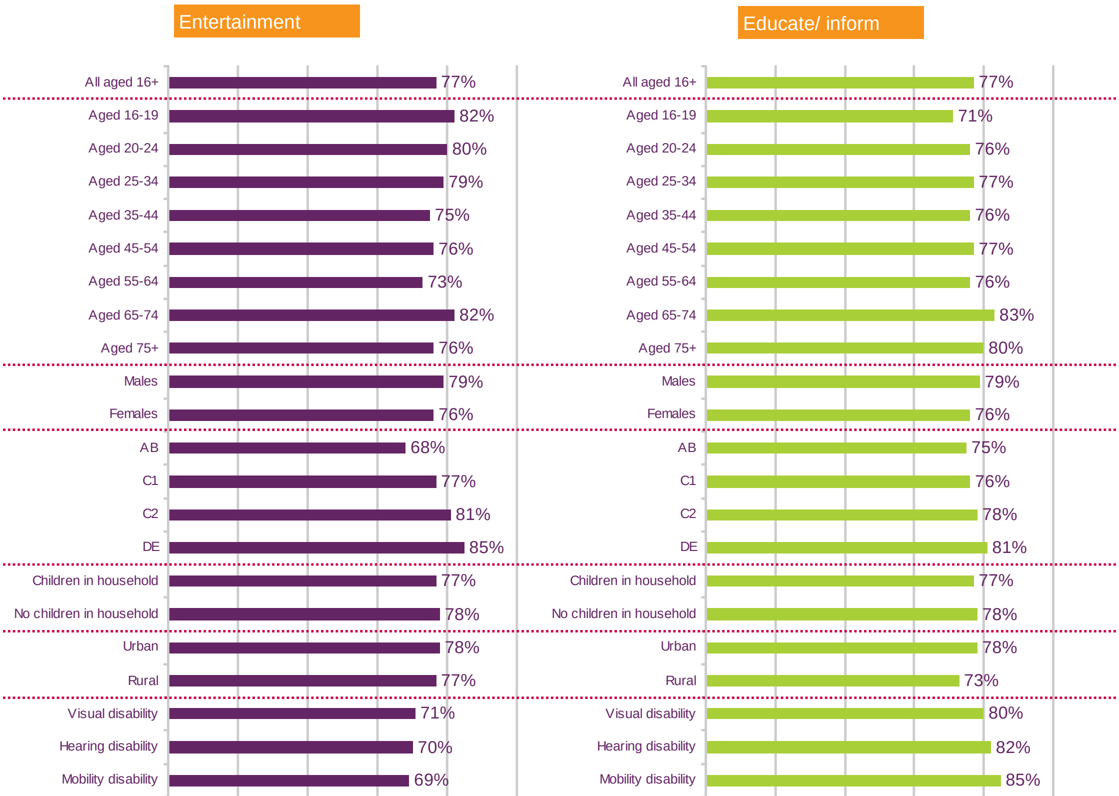
Adults with any televisions in the household were prompted with a series of statements about television and were asked to indicate the extent to which they agreed or disagreed with each one.

Figure 16 shows the proportion of those with any televisions in the household who agree that:

- *the main role of television should be to provide entertainment*; and
- *the main role of television should be to inform and educate people.*

Responses are shown for all adults with any televisions in the household, each of the age groups, and the key demographic groups.

Figure 16: Role of television – *entertainment* and *education*



T17E-F – The main role of TV should be to provide entertainment/ The main role of TV should be to inform and educate people
Base: All adults aged 16+ with a TV in the household (2887 aged 16+, 203 aged 16-19, 205 aged 20-24, 471 aged 25-34, 657 aged 35-44, 488 aged 45-54, 336 aged 55-64, 355 aged 65-74 167 aged 75+ , 1358 males, 1529 females, 549 AB, 830 C1, 603 C2, 890 DE, 1477 with children in household, 1293 without children in household, 2193 urban, 694 rural, 131 with a visual disability,116 with a hearing disability, 229 with a mobility disability)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Among all adults with a television in the household, three in four agree with each of these two statements: television is not seen to have a primary role, and needs to provide both entertainment and education.

Certain groups of adults are more likely to agree that the main role of television should be to provide entertainment. It is more common among males, 65-74s and those in the DE socio-economic group.

Similarly, certain groups of adults are more likely to agree that the main role of television should be to inform and educate people. This view is more common among those aged 65-74, those with a mobility impairment, those in DE socio-economic group, and those in urban areas.

Two in three (65%) adults agree with both of these statements about the main role of television, with a higher degree of overlap among those aged 65-74 (71%) and those in the DE socio-economic group (72%).

These questions were not asked as part of the 2005 Media Literacy Audit.

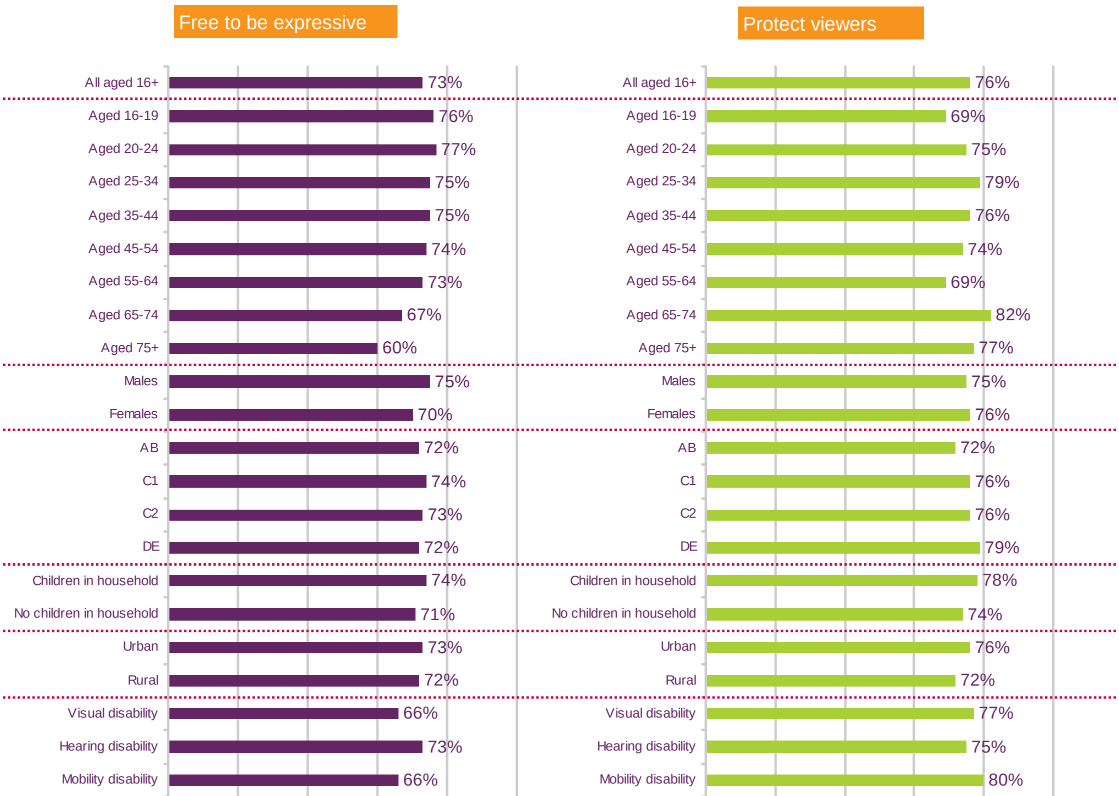
2.11 Attitudes towards television

Figure 17 shows the proportion of those with any televisions in the household who agree that:

- *TV programmes must be free to be expressive and creative*; and
- *TV viewers must be protected from seeing inappropriate or offensive content.*

Responses are shown for all adults with any televisions in the household, in each of the age groups, and the key demographic groups where findings differ significantly.

Figure 17: Attitudes towards television – *free to be expressive and protected from content*



T17A-B – TV programmes must be free to be expressive and creative/ TV viewers must be protected from seeing inappropriate or offensive programmes
Base: All adults aged 16+ with a TV in the household (2887 aged 16+, 203 aged 16-19, 205 aged 20-24, 471 aged 25-34, 657 aged 35-44, 488 aged 45-54, 336 aged 55-64, 355 aged 65-74 167 aged 75+ , 1358 males, 1529 females, 549 AB, 830 C1, 603 C2, 890 DE, 1477 with children in household, 1293 without children in household, 2193 urban, 694 rural, 131 with a visual disability,116 with a hearing disability, 229 with a mobility disability)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Among all adults with a television in the household, three in four agree with each of these two statements: *television programmes must be free to be expressive and creative* and *viewers must be protected from inappropriate or offensive programme content*. Overall levels of agreement and disagreement with each statement have not changed since the 2005 Media Literacy Audit.

Males are more likely to agree that television programmes must be free to be expressive and creative. By age, it is those who are less likely to agree that stand out: those aged 65 and over.

Similarly, certain groups of adults are more likely to agree that television viewers must be protected from seeing inappropriate or offensive programmes. This view is more common among those aged 65-74, those in DE socio-economic group, those with children in the household, and those in urban areas.

Over half (56%) of all adults with any televisions in the household agree with both of these statements about television programmes, with a higher degree of overlap among those with children in the household (58%) than those with no children in the household (54%).

2.12 Attitudes towards television programme content

We wanted to assess the extent to which people trust television news and factual programmes, and whether this depended on the channel or programmes the content was shown on. The attitudinal analysis looks at those people who watch news and factual programmes. Across all adults, the proportion that does not watch news and factual programmes is 6%, and this is more common for those aged 16-19 (16% do not watch), 20-24 (12%), and those in the DE socio-economic group (8%).

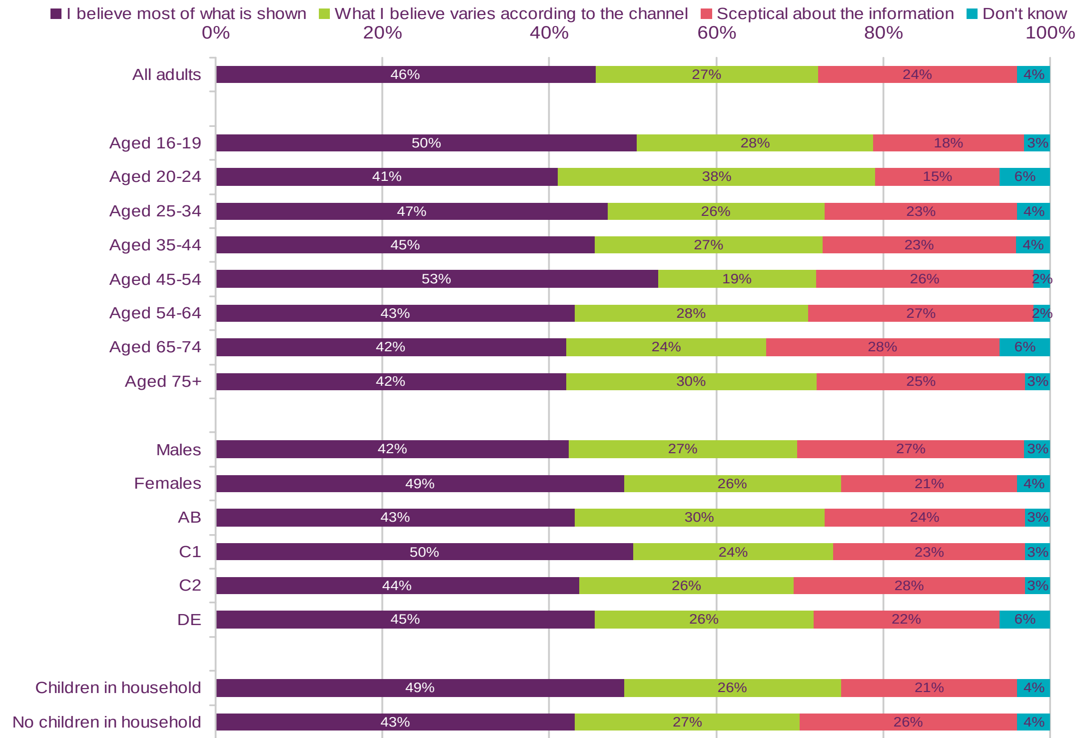
Just under half (46%) who watch television news and factual programmes say they believe most of what is shown. However, the remaining viewers are more critical about what they view:

- 27% say their level of belief varies according to the channel; and

- 24% are sceptical about the information on these programmes.

Figure 18 shows the extent to which adults who watch news and factual programmes, believe what they see.

Figure 18: Belief in news and factual programmes



T15 – When you watch news and factual programmes on television which of the following is closest to your view?
Base: All adults who watch news and factual programmes aged 16+ (2727 Aged 16+, 169 aged 16-19, 188 aged 20-24, 441 aged 25-34, 632 aged 35-44, 467 aged 45-54, 328 aged 55-64, 340 aged 65-74, 157 aged 75+, 1289 males, 1438 females, 534 AB, 796 C1, 563 C2, 819 DE, 1398 with children in household, 1219 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Close to half of all adults who watch news and factual programmes say they *believe most of what is shown*, and this is more common among those aged 45-54 and those in the C1 socio-economic group. Females and those with children in the household are also more likely to believe most of what is shown.

One in four adults who watch news and factual programmes told us they are *sceptical about the information*. This is more common among males and those with no children in the household.

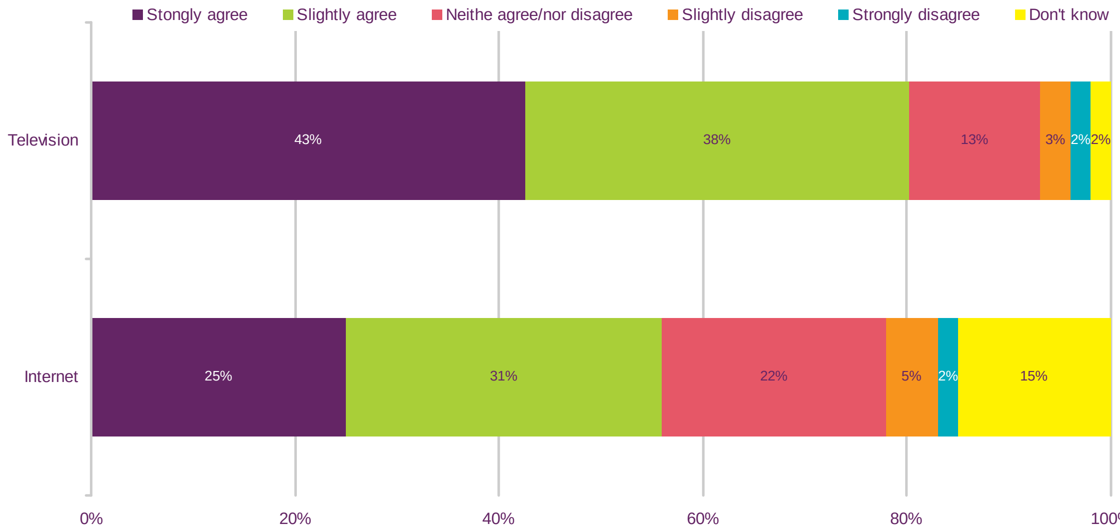
Table 4: Perception of news and factual programmes, by demographic profile

Believe most of what is on news and factual programmes	Sceptical about information/ belief varies by channel
45-54s, females and C1s	Males and 16-24s

Most people agree that television is very influential in shaping public opinion about political and other important issues (81%).

The internet is perceived by fewer people to be influential, although over half (56%) do agree that it is influential. Considering the profile of regular internet users in general, it is not surprising that those who believe the internet is influential are more likely to be under-55s, ABC1s and people with children in the household. However, across all demographic groups, a higher proportion say that television is influential than say the same about the internet.

Figure 19: Level of agreement with whether the television and internet are influential in shaping public opinion



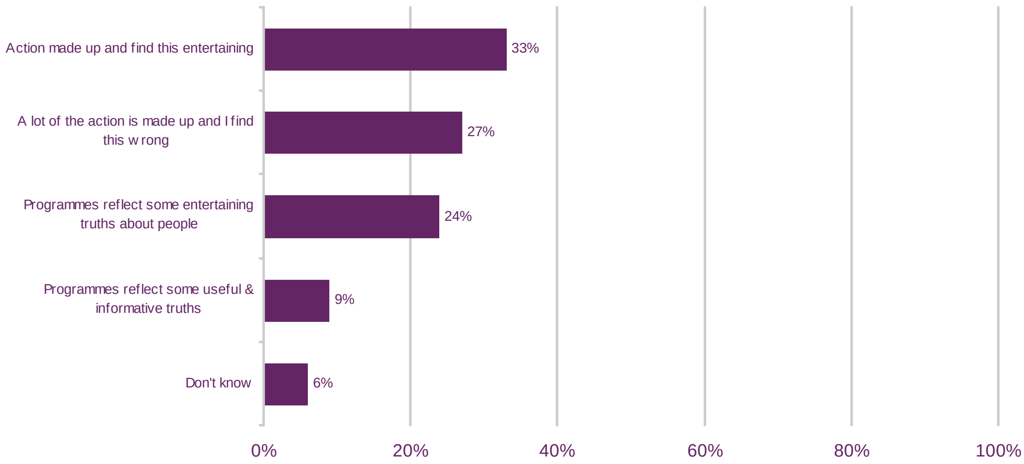
T17h/IN48f – The television/internet is very influential in shaping public opinion about political and other important issues?
Base: Adults aged 16+ (2905)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

We also asked people how they perceive reality television programmes. Those saying they do not watch this type of programming have been excluded from the analysis. Across all adults, the proportion who do not watch reality television programmes is 41%, and this is more common for those aged 55-64 (64%), 65-74 (65%) and 75 and over (71%). Males and those in the AB socio-economic group are more likely to say they do not watch reality television programmes (49% of each group don't watch).

Figure 20 shows responses from adults who do watch reality television programmes. The two options available were:

- *I think that a lot of the action is made up for the cameras and I find this wrong; and*
- *I think that a lot of the action is made up for the cameras and I find this entertaining.*

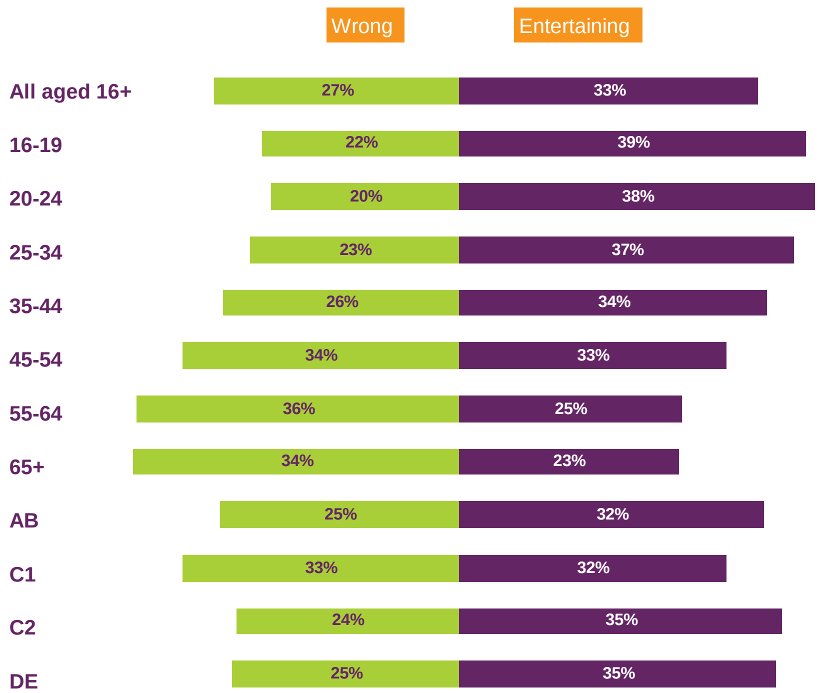
Figure 20: Perception of reality television programmes



T16 – When you watch reality TV programmes (like Big Brother, Super Nanny and Wife Swap) which of the following is closest to your view?
Base: All adults aged 16+ who have watched reality TV programmes (1757)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The measures shown in Figure 21 to the left of the vertical line represent those choosing the response option *I think that a lot of the action is made up for the cameras, and I find this wrong*. The measures to the right represent those choosing the option *I think that a lot of the action is made up for the cameras, and I find this entertaining*.

Figure 21: Attitudes towards reality television programmes – *I think that a lot of the action is made up for the cameras, and I find this…*



T16 – When you watch reality TV programmes (like Big Brother, Supernanny or Wife Swap), which of the following is closest to your view?
Base: All adults who watch reality TV programmes aged 16+ (1757 Aged 16+, 158 aged 16-19, 166 aged 20-24, 352 aged 25-34, 461 aged 35-44, 297 aged 45-54, 128 aged 55-64, 192 aged 65+, 287 AB, 524 C1, 394 C2, 544 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Among all adults who watch reality television programmes and who believe that a lot of the action is made up, there is a slight skew towards those who find this entertaining and away from those who find it wrong. This is more evident for younger adults. The proportion that believes it is wrong increases with age. Adults in C1 socio-economic group are more likely than adults as a whole to find this wrong.

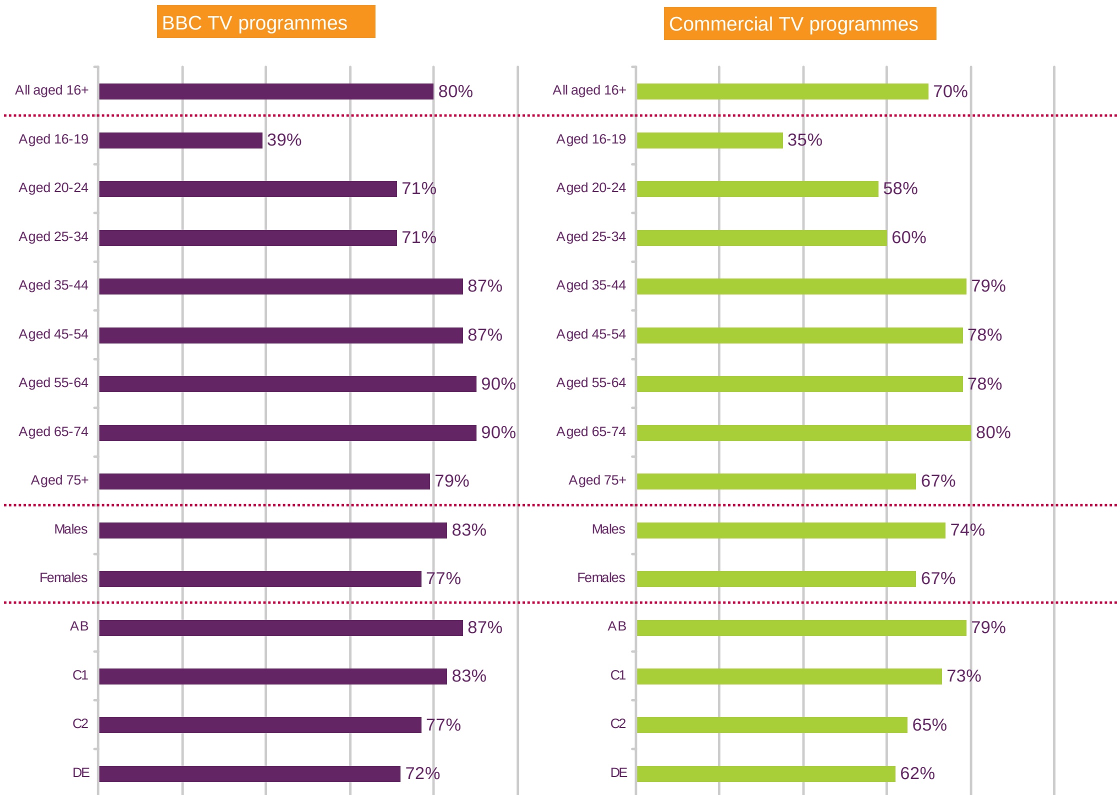
2.13 Understanding sources of television funding

All adults were asked how television programmes are mainly funded, with separate questions for BBC television programmes and programmes on commercial channels such as ITV, Channel 4 and Five. Figure 22 shows the proportion giving the correct response at each of these questions:

Funding of television content
BBC channels are funded by the licence fee and commercial public service broadcast (PSB) channels are funded by advertising (programme sponsorship provides a secondary revenue stream).

Responses are shown for all adults aged 16 and over, as well as each of the age groups and the key demographic groups where there are significant differences.

Figure 22: Correct understanding of how television programmes are mainly funded



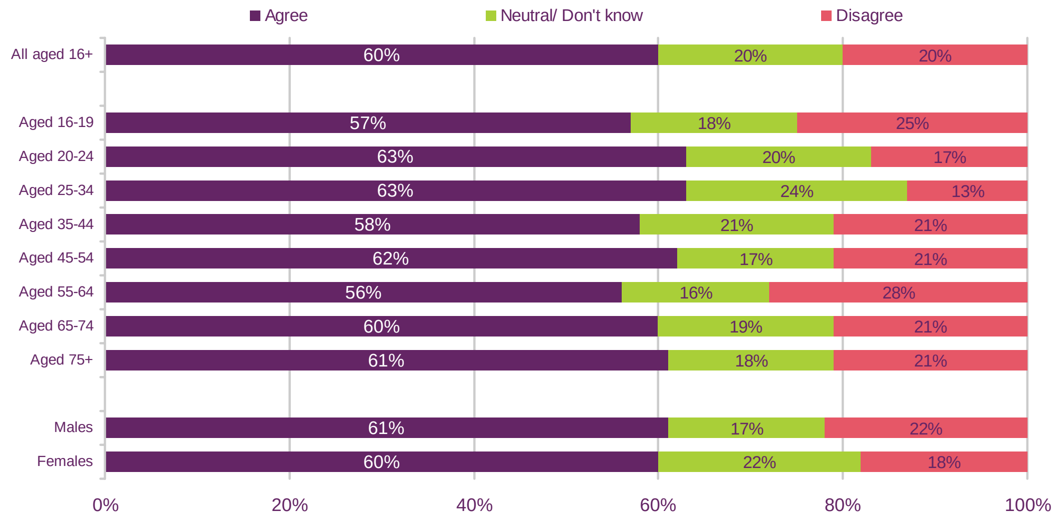
T8/T9 – How would you say BBC TV programmes are mainly funded?/ How would you say programmes are mainly funded on ITV, Channel 4 and Five?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Awareness is higher for BBC television programme funding; four in five UK adults know how BBC television programmes are mainly funded compared with seven in ten knowing about commercial television programme funding. Compared to the 2005 Media Literacy Audit, awareness of BBC television programme funding has decreased (from 84%) as has awareness of commercial television programme funding (from 76%).

Across both questions, awareness of television programme funding is lower for those aged under 35, females, and those in DE socio-economic group.

Adults with any televisions in the household were asked to indicate the extent to which they agree or disagree with the statement: *As long as television provides good programmes it doesn't really matter who owns the channels or how they are funded*. Figure 23 shows responses from all adults with any televisions in the household.

Figure 23: Attitudes towards television among television viewers – *doesn't matter who owns the channels or how they're funded*



T17C– As long as TV provides good programmes it doesn't really matter who owns the channels or how they are funded
Base: All adults aged 16+ who have a TV (2887 aged 16+, 203 aged 16-19, 205 aged 20-24, 471 aged 25-34, 657 aged 35-44, 488 aged 45-54, 336 aged 55-64, 355 aged 65-74 167 aged 75+ , 1358 males, 1529 females)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

A majority of all adults with any televisions in the household agree with this statement (60%), with one in five overall disagreeing. No single age group or other demographic group stands out in terms of being more likely to agree *that it does not matter who owns the channels or how they are funded*. Those aged 55-64 are more likely than adults as a whole to disagree, as are males and those in the AB socio-economic group.

Overall levels of agreement and disagreement with this statement have not changed since the 2005 Media Literacy Audit.

2.14 Television regulation

All adults were asked whether television programmes are regulated, with a description[2] of a regulator provided if necessary. Figure 24 shows responses from all adults aged 16 and over, by age groups and other demographic groups showing differences in responses to this question.

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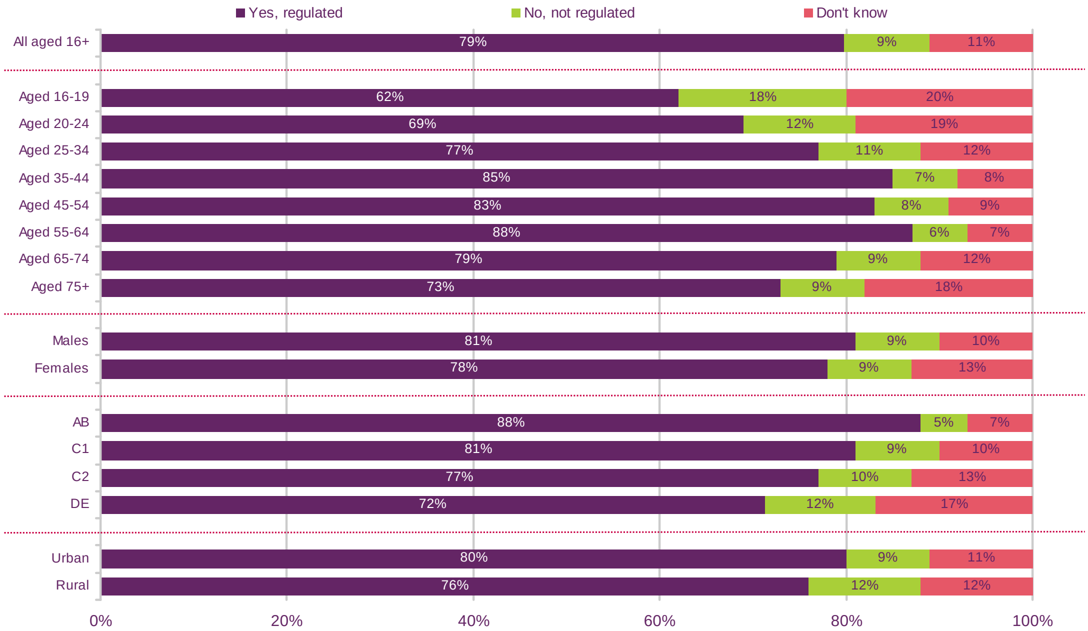
[2] A regulator is often called a 'watchdog' – it sets rules/ guidelines about content. People can also complain to the regulator if they feel content has included something that they thought was inappropriate e.g. because it was offensive, harmful, inaccurate or unfair

Figure 24: Are television programmes regulated?



T12 – As far as you know, are TV programmes regulated?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE, 2208 Urban, 697 Rural)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While four in five of all adults state that television programmes are regulated, there is a great deal of variation in responses from the different age groups and across several of the key demographic groups.

Despite the majority of adults knowing that television programmes are regulated, those aged under 35 and the over -75s are more likely to respond that they do not know than others. Awareness of television programme regulation is lower among females, those who are not working, and those in the DE socio-economic group.

Awareness of television programme regulation has not changed across all adults since the 2005 Media Literacy Audit.

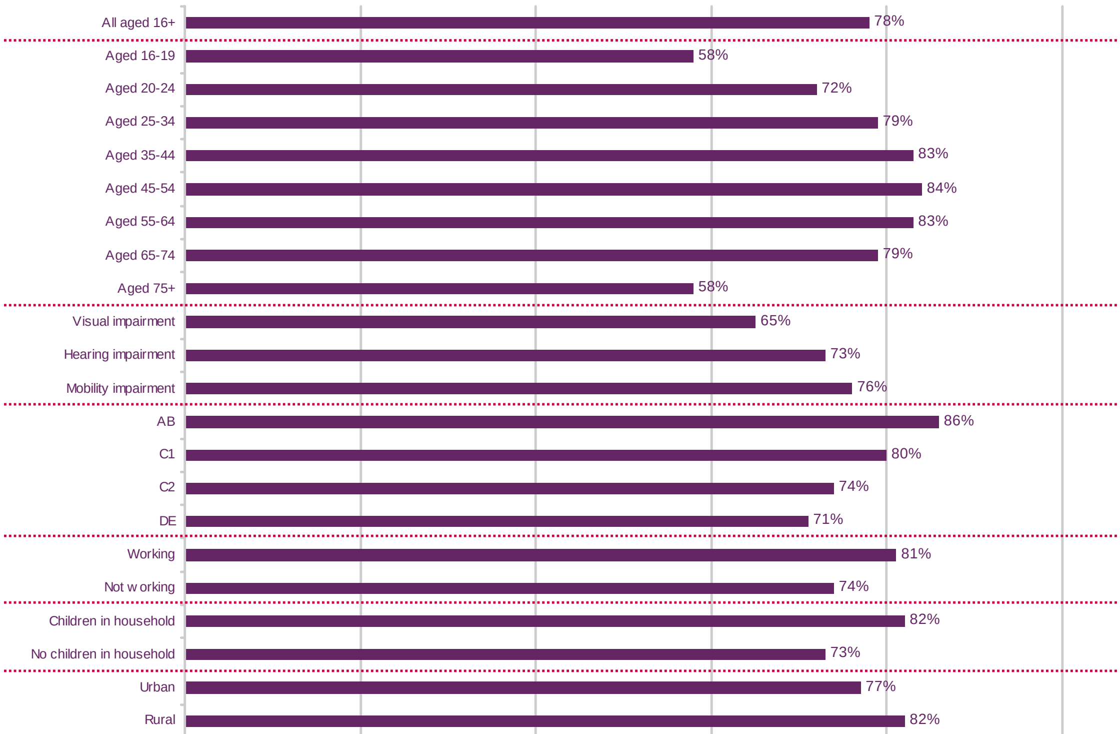
2.15 Television watershed

One element of television regulation is the watershed. The watershed is a requirement that any content which contains material that is unsuitable for children should not, in general, be shown before 21:00 or after 05:30.

We assessed awareness of the watershed by asking whether there is a time of day after which programmes on the main television channels that are considered unsuitable for children can be shown, and if so, what time of day this is.

Figure 25 shows the proportion of all adults who responded correctly that there is a television watershed at 21:00. Responses are shown for each of the age groups and the key demographic groups showing differences in responses to this question.

Figure 25: Aware of 9pm television watershed



T14 – Is there a time of day after which programmes that are considered unsuitable for children can be shown? What time is this?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 131 visual impairment, 116 hearing impairment, 230 mobility impairment, 552 AB, 836 C1, 605 C2, 897 DE, 1437 working, 1433 not working, 1481 Children in household, 1306 No children in household, 2208 Urban, 697 Rural)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Four in five UK adults are aware of the 9pm television watershed.

Awareness of the watershed is lower among those aged under 25 and also among those aged 75 or over. Compared to all adults, awareness is lower among those with a visual impairment and those in C2 or DE socio-economic groups. Awareness is lower among those who are not working, those with no children in the household and those in urban areas.

Overall awareness of the 9pm television watershed has decreased from 81% in 2005 to 78% in 2007.

2.16 Concern about television

Adults were asked to mention, without prompting, any concerns they have about what is on television and were then asked to respond using a scale to say how concerned they are about what is on television.

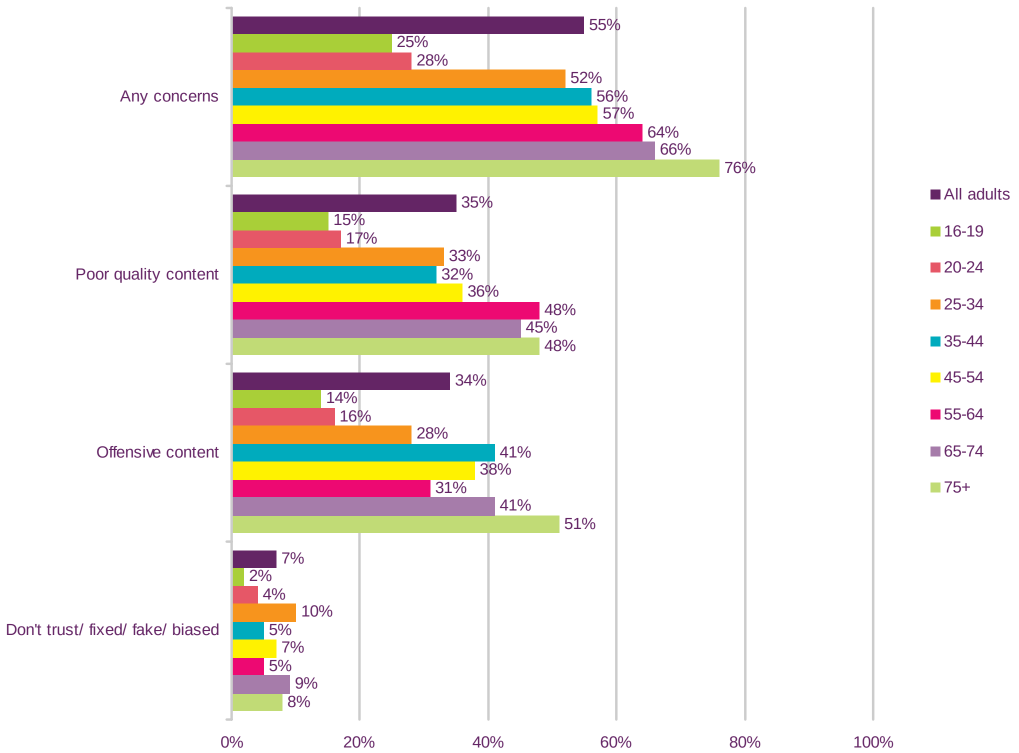
The unprompted responses have been grouped into themes. Three themes are evident in terms of types of concerns;

- poor quality content - relating to responses such as *too many repeats, too many reality television programmes, poor quality programmes* and *too many advertising breaks*;
- offensive content - relating to responses such as *violence, bad language, sex/ nakedness* and *people behaving badly*; and

- don’t trust/ fixed/ fake/ biased - relating to responses such as *phone-in competitions that are fixed/ faked*.

Figure 26 shows responses from all adults regarding any concerns they have about what is on television, by age groups.

Figure 26: Concerns about what is on television, by age

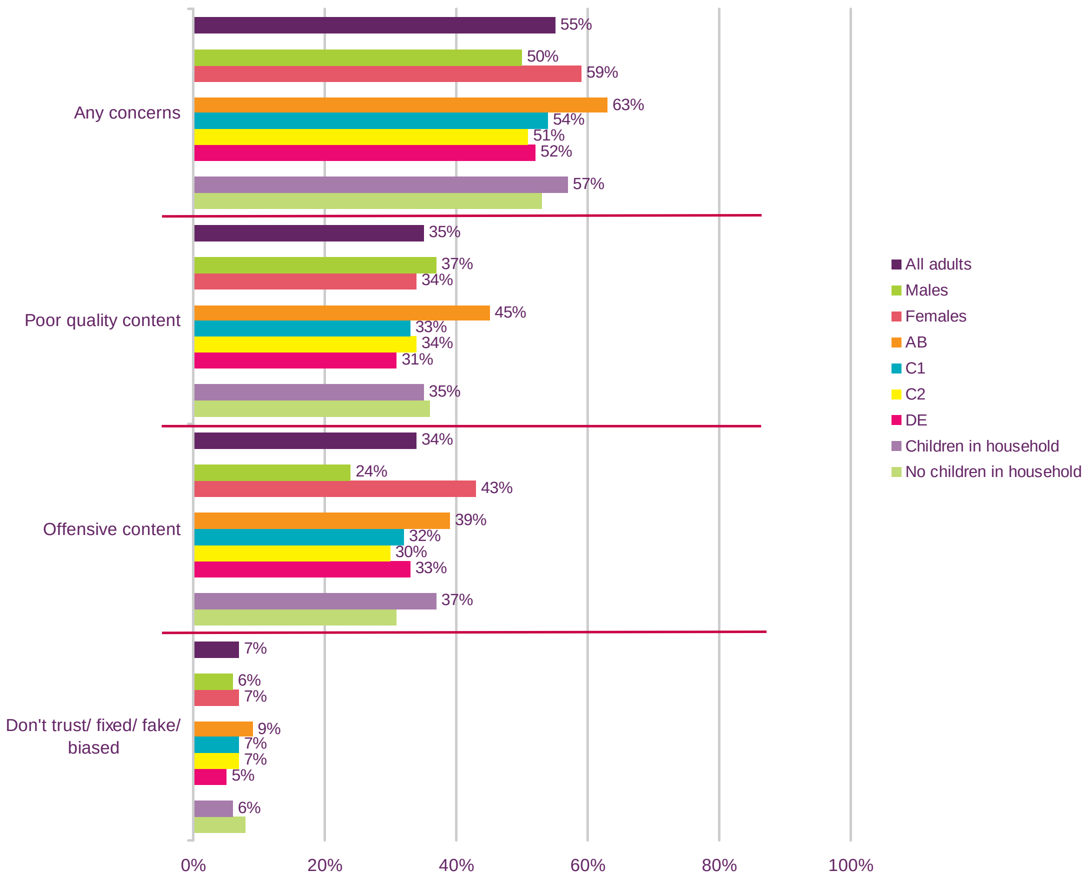


T10 – Can you tell me if you have any concerns about what is on TV? What sorts of things are you concerned about?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While just over half of all adults mention any concerns about what is on television, there is a very strong link with age. Around one in four adults aged under 25 mention any concerns, compared to two-thirds or more of those aged 55 and over. Mentions are highest from those aged 75 and over.

Figure 27 compares responses from the key demographic groups showing differences in responses to this question.

Figure 27: Concerns about what is on television, by key demographic groups



T10 – Can you tell me if you have any concerns about what is on TV? What sorts of things are you concerned about?
Base: All adults aged 16+ (2902 Aged 16+, 1370 Males, 1535 Females, 552 AB, 836 C1, 605 C2, 897 DE, 1481 Children in household, 1306 No children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Females are more likely than males to mention a concern about what is on television; this is driven by a much higher proportion of females saying they are concerned about offensive content on television. In contrast, the most common concerns for males are related to poor quality content.

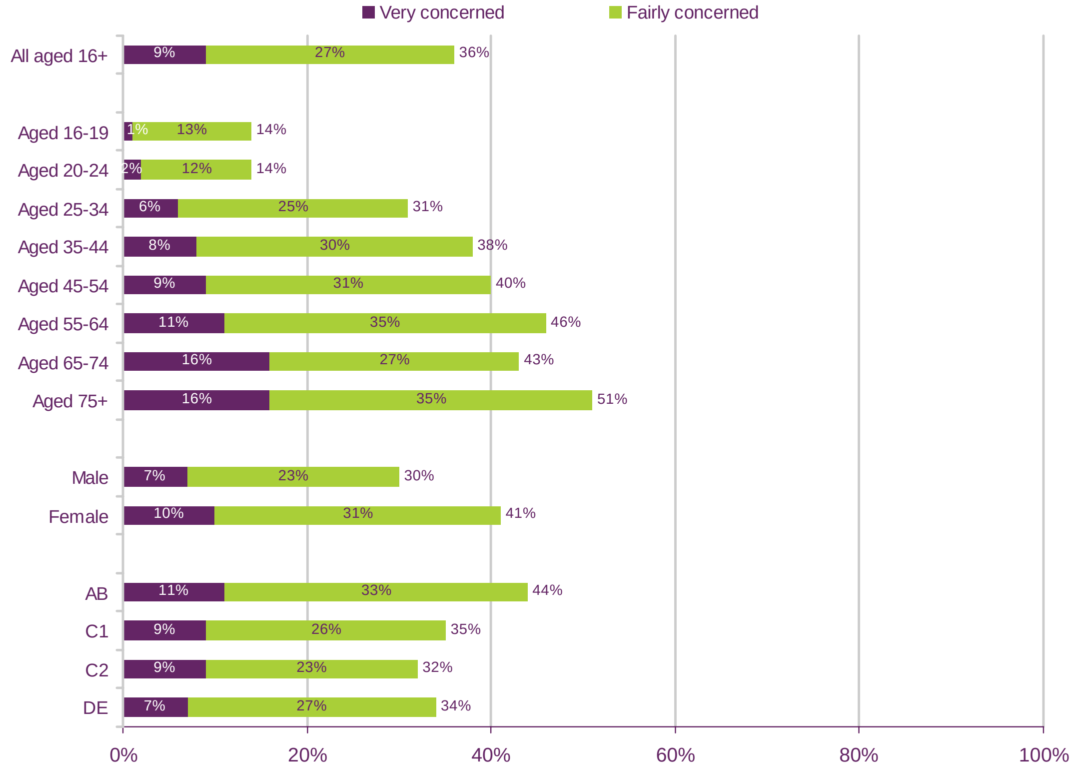
Across the socio-economic groups, AB adults are more likely than adults as a whole to mention any concerns about what is on television. Those in the AB socio-economic group are more likely than adults as a whole to mention concerns relating to poor quality content and offensive content.

Those with children in the household do not vary from those with no children in the household at the overall level in terms of mentioning any concerns, but are more likely to mention concerns relating to offensive content.

Of the 9% of adults (shown in Figure 28) who are very concerned about what is on television, three-quarters (78%) mentioned concerns related to offensive content.

Figure 28 shows the proportion of all adults who are either very, or fairly, concerned about what is on television.

Figure 28: Degree of concern about what is on television



T11 – Overall, how concerned are you about what is on TV?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 Males, 1535 Females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

One in three UK adults (33%) say they are very or fairly concerned about what is on television, with the majority being fairly concerned, as opposed to very concerned. The level of concern about what is on television is higher among those aged 45 and over and highest for over-75s. In comparison, concern among those aged under 25 is less than half the level for all adults. Females are more concerned about television than males, and those in socio-economic group AB are more concerned than adults as a whole.

Across all adults the level of concern about what is on television has not changed since the 2005 Media Literacy Audit.

While about half of all adults (55%) mention specific concerns about what is on television, only around one in three (36%) say they are very or fairly concerned about what is on television generally. This suggests that some of the specific issues that people mention are not serious enough to cause them a great deal of concern. These adults are more likely to mention concerns relating to poor quality content on TV.

Section 3

Internet

This section looks at the internet in detail, covering issues such as take-up and intentions to get access at home, where the internet is used, estimated weekly hours using the internet, types of use made by internet users and the resulting overall breadth of use, main reason for using the internet, using other media at the same time as the internet, users' interest in and confidence with internet/ computer functions. It also covers trust in website content, attitudes towards the internet, understanding sources of funding and regulation, concerns about what is on the internet and about online security, experience of creative activities online, and use of social networking sites.

3.1 Summary

Take-up (62%) and use (59%) of the internet has increased since 2005, in particular among those aged 20-24. A minority of those aged 55 and over and those in DE households use the internet. The estimated weekly volume of use has increased to 12.1 hours, and is mostly accounted for by use at home. Users aged under 35, males, those in AB households, those who are working, and those in urban areas have a higher estimated weekly volume.

Among those who do not have the internet at home, reasons for not intending to get the internet are more likely to be voluntary than involuntary, although younger adults and those with children in the household are more likely to have involuntary reasons.

Breadth of use of the internet, in terms of the number of types of uses made, decreases by age, with a broader use also made by those in AB and C1 households and those in urban areas.

While using the internet *to find out or learn things* is the most common reason given by all users, those aged 16-19 are just as likely to use the internet *for contact with other people*.

Three in four internet users ever use other media while using the internet, most commonly talking on a phone. Using another device while using the internet decreases across the age groups, and applies to a minority aged 65 and over.

Interest in the functions available with the internet and with computers more generally is lower among internet users aged 55 and over and those in DE households. Those who are interested are mostly confident with the functions, but confidence is lower for functions relating to security and blocking software.

The internet is more likely to be seen as having a role in providing education than in providing entertainment. Similarly, internet users are more likely to feel that users should be protected from inappropriate or offensive content than to feel that internet sites should be free to be expressive and creative. Among older users (aged 65 and over), protection outweighs freedom of expression to a greater extent.

One in four internet users say they *don't tend to trust what they read or see when they visit websites*, and this is more evident for those aged 55 and over.

Two in five adults are aware of how the BBC website is funded and one in four are aware of how search engine websites are funded, and awareness has decreased since 2005. Awareness of funding is lower for younger adults aged 16-19, females and those in C2 or DE households. Half of all internet users (52%) believe that *it doesn't matter who owns the* *websites or how they are funded, so long as the internet provides good websites*. This view is more common among 16-19 year olds.

There is little consensus among adults as to whether the internet is regulated, with two in five saying they are unsure whether it is regulated, one third saying it is not, and the remaining one quarter saying it is regulated. Fewer adults believe it is regulated than believed this in 2005.

While three in five adults are concerned about what is on the internet, this is lower for the youngest (aged under 25) and oldest (aged 65 and over) adults. Concerns are most likely to relate to offensive content, and are higher for females, those in AB households and those with children in the household. The level of concern about what is on the internet has increased since 2005.

Among internet users, the cautious outnumber the confident in terms of security concerns when proving information online, but a minority say they would never provide this type of information. Four in five internet users make judgements about websites before entering personal details, with an increase in judgements based on personal instinct or peer feedback, compared to 2005. Younger internet users are less likely to make these judgements based on personal instinct and professional marks compared with others, but are more likely to use peer-to-peer reviews. A similar proportion of internet users make checks of some kind when visiting a website that is new to them.

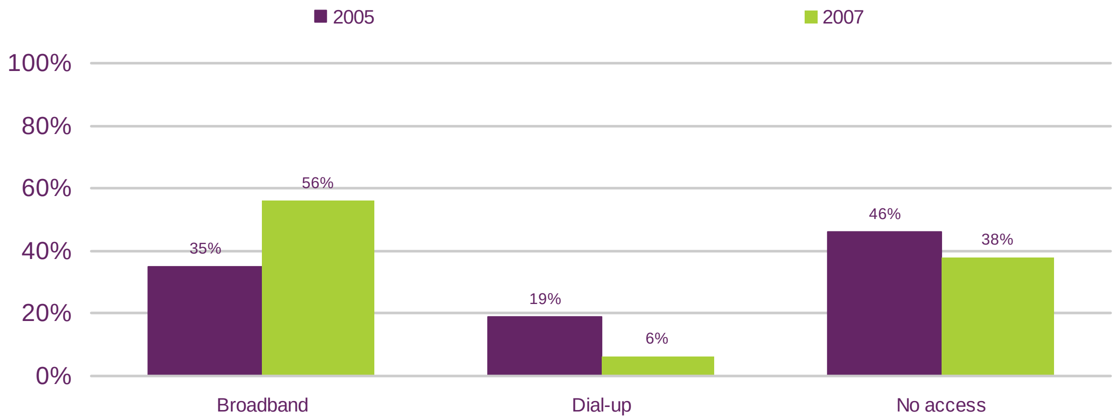
Half of all internet users have experience of some type of creative online activity, and this is mostly accounted for by uploading photos to the internet. Such experience is much more common among users aged under 25, in particular, experience of setting up a social networking site page or profile.

One in five internet users (equivalent to one in eight adults) have a page or profile on a social networking site, but this overall measure is heavily skewed towards those aged under 25. Facebook, MySpace and Bebo are the most commonly used sites. Younger social networking site users have profiles on more sites, are more frequent site visitors, and are more likely to have a profile that can be seen by anyone. Social networking sites are mostly used for contact with friends or family, with younger users more likely than average to use the sites to listen to music or to talk to people they don't know.

3.2 Take-up of internet services

Figure 29 shows the take-up of internet services at home among UK adults, with findings from the 2005 and 2007 Media Literacy Audit surveys shown alongside each other for comparison.

Figure 29: Take-up of internet services, 2005 and 2007



IN1/ IN3 – Do you or does anyone in your household have access to the internet at home through a computer or laptop?/ And what type of internet access do you have at home through a computer or laptop?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

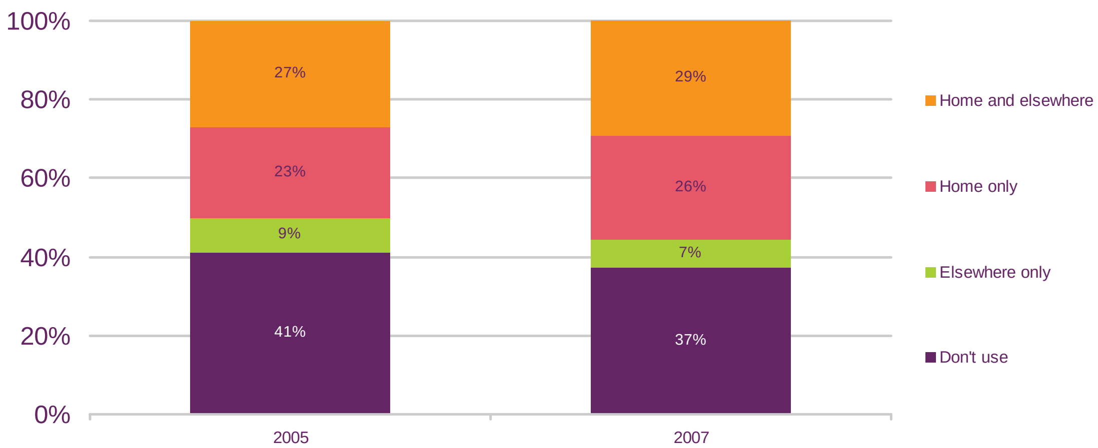
Access to the internet at home has increased by 8% since 2005, with access to broadband increasing by 21% since 2005. This suggests that growth in broadband has come predominantly from people switching from dial-up, rather than from new internet users.

Ownership of the internet at home among adults in each age group and in key demographic groups is shown in Figure 3 and Table 2. As detailed in section 1, take-up of the internet has increased by more than the UK average for those aged 20-24 and for those aged 45-54. Across other demographic groups the increase since 2005 is also higher for those in the C1 socio-economic group and for those in rural areas.

3.3 Where the internet is used by adults

All adults were asked whether they use the internet anywhere apart from at home, and if so where that was. Figure 30 shows where the internet is used by adults, comparing findings from the 2005 and 2007 Media Literacy Audit.

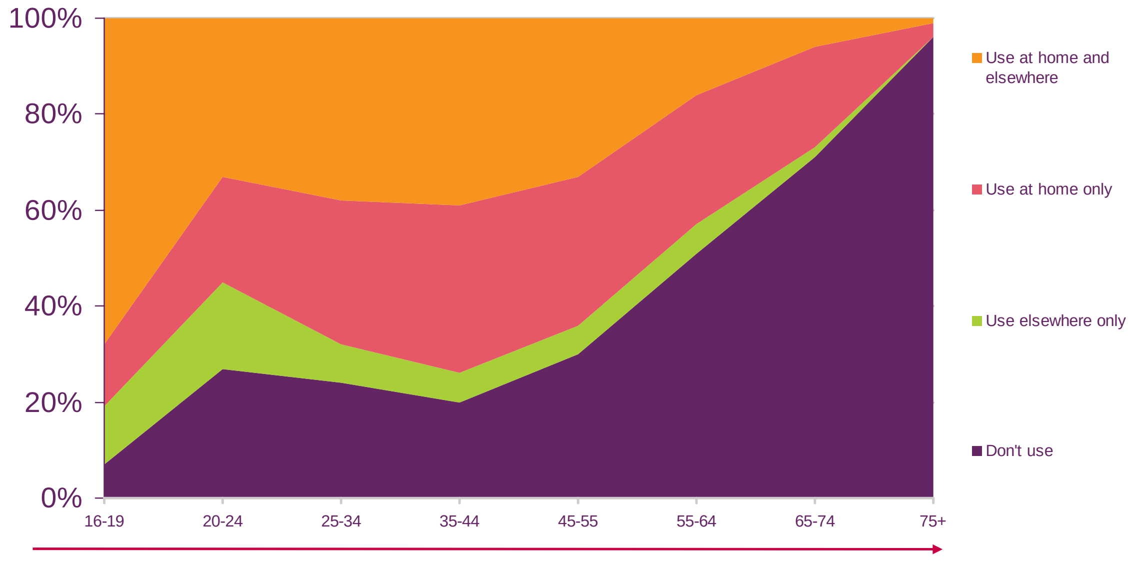
Figure 30: Where the internet is used, 2005 and 2007



IN1/ IN5 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The decrease in those who do not use the internet (Figure 30) reflects the increase in overall take-up of the internet since 2005; from 59% to 63%. Figure 31 shows where each age group accesses the internet, if at all.

Figure 31: Where the internet is used, by age



IN1/ IN5 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all?
Base: All adults aged 16+ (2905 aged 16=, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Adults aged 16-19 are the most likely to use the internet both at home and outside the home, with use at school or college accounting for the majority of use outside the home for this age group. Adults aged 20-24 are more likely than others to use the internet only outside their home, with use at the workplace or at friends' homes accounting for the majority of this use.

Adults aged 55 and over are less likely than adults as a whole to use the internet at all.

Table 5 shows where the internet is used for other key demographic groups, where findings differ significantly.

Table 5: Where the internet is used, by key demographic group

	Use at home and elsewhere	Only use at home	Only use elsewhere	Do not use
	%	%	%	%
All adults aged 16+ (2905)	29	26	7	37
Males (1370)	33	25	7	36
Females (1535)	27	27	7	39
AB (552)	52	24	4	20
C1 (836)	37	29	7	27
C2 (605)	16	34	9	41
DE (897)	10	20	8	62
Children in household (1481)	33	32	6	29
No children in household (1306)	25	20	8	47
Urban (2208)	30	25	7	38
Rural (697)	29	32	7	32
Working (1437)	41	29	7	24
Not working (1433)	15	23	7	55
Visual impairment (131)	13	18	7	62
Hearing impairment (116)	14	16	1	70
Mobility impairment (230)	7	21	3	70

IN1/ IN5 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all?
Base: All adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While males and females do not differ in terms of the incidence of using the internet at all, males are more likely to use the internet outside of the home.

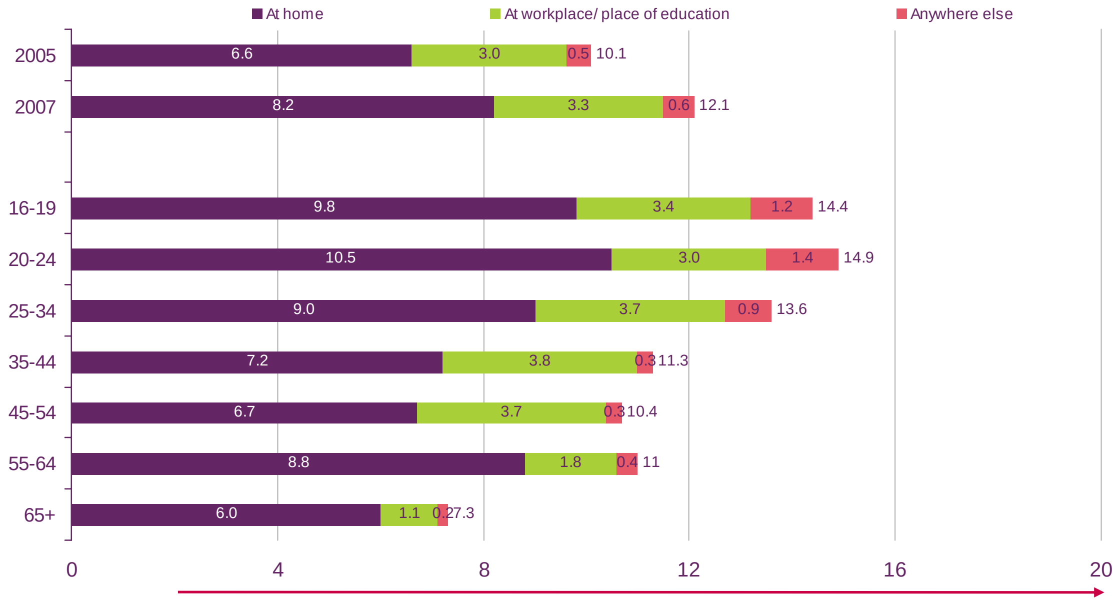
Adults in the AB and C1 socio-economic groups are more likely than adults as a whole to use the internet at home and elsewhere. Those in the C2 socio-economic group are more likely to use the internet only at home, while those in the DE socio-economic group are less likely to use the internet at all.

Those with children in the household, those in rural areas and those who are working are more likely to use the internet at all. Adults with a visual, hearing or mobility impairment are less likely than adults as a whole to use the internet at all.

3.4 Estimated volume of weekly internet use

Adults using the internet at home or elsewhere were asked to estimate how many hours in a typical week they use the internet in each of the places they access it. Figure 32 compares the estimated average weekly volume of use of the internet from the 2005 and 2007 Media Literacy Audits, and also shows the findings from 2007 across each age group. Because these estimates are self-reported it is likely that a degree of under- and over-reporting will be present, and the estimates shown should be taken as indicative only.

Figure 32: Weekly volume of internet use, 2005 and 2007, by age

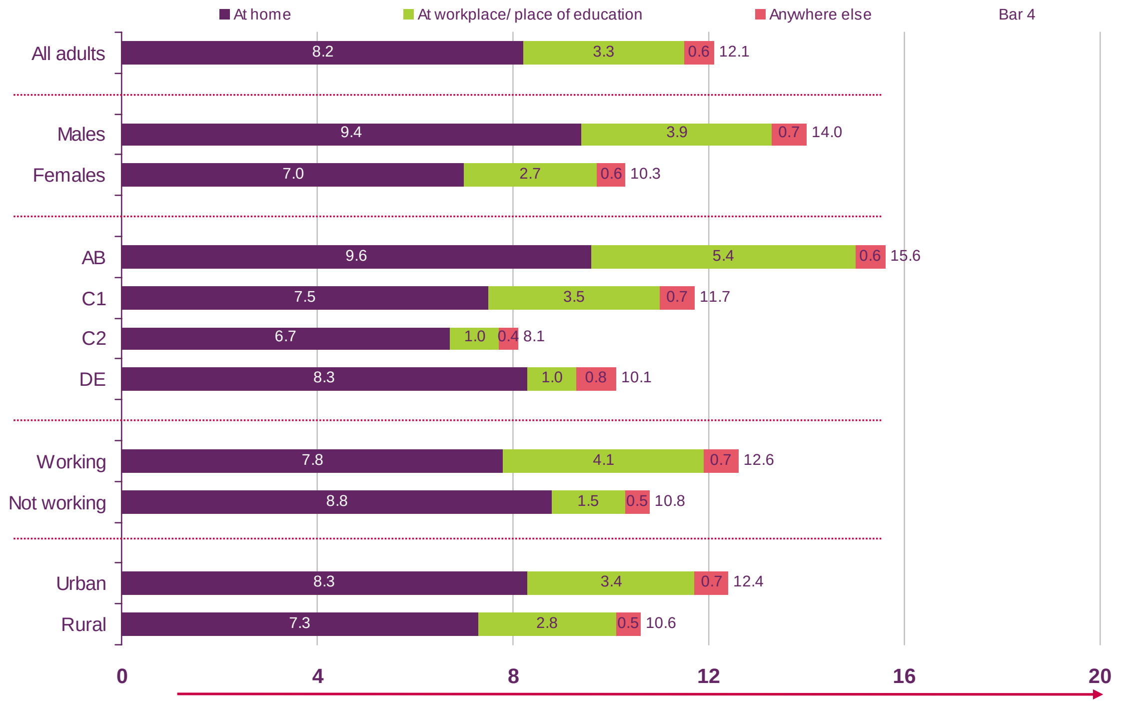


IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
Base: All adults aged 16+ who use the internet at home or elsewhere (1746 in 2005, 1723 in 2007, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The estimated weekly volume of use of the internet among users has increased from 9.9 hours in 2005 to 12.1 hours in 2007, with most of this increase accounted for by use at home. Internet users aged under 35 have a higher volume of use than those aged 35 and over, again through a higher volume of use at home. Compared to 2005, use among those aged under 25, males and those in AB and C1 socio-economic groups has increased by more than the average.

Figure 33 shows the estimated weekly volume of internet use for other key demographic groups, where findings differ significantly.

Figure 33: Weekly volume of internet use, comparing key demographic groups



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?
Base: All adults aged 16+ who use the internet at home or elsewhere (1746 in 2005, 1723 in 2007, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Males have a higher estimated weekly volume of use than females, through higher volumes both at home and in the workplace/ place of education. Those in the AB socio-economic group have a higher volume of use than adults as a whole, while those in C2 and DE socio-economic groups have a lower than average volume of use.

Those who are working have a higher volume than those who are not working, and those in urban areas have a higher volume than those in rural areas (despite take-up of the internet in general being higher in rural areas).

One in four internet users (27%) have different personal email addresses for different purposes. This is most common among the youngest internet users, aged 16-19, and those in AB socio-economic group households. Among these users, two in five (37%) have different personal email addresses for different purposes.

3.5 Intentions to get internet access at home

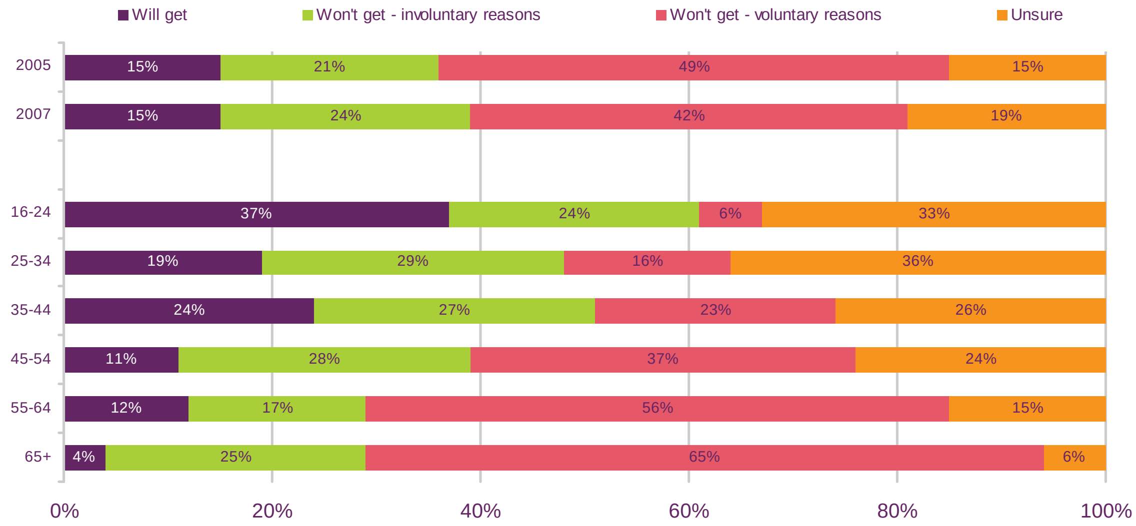
Those who do not currently have access to the internet at home (38% of UK adults) were asked whether they intend to get access at home in the next year. Those who said they did not were asked their reasons why. Reasons for not intending to get internet access have been categorised as either voluntary or involuntary. Voluntary reasons for not owning a device include a perceived lack of need for the platform or satisfaction with an alternative platform. Involuntary reasons are where people feel they do not have a choice about taking up a platform, and this is primarily due to affordability. In order to report the relative importance of voluntary versus involuntary, we have calculated the way people answered the question in the following way:

- Voluntary reasons include anyone who mentioned a voluntary reason such as ‘no need’ and did not mention an involuntary reason such as cost; and

- Involuntary reasons include anyone who mentioned an involuntary reason (such as cost or not being able to pick up a signal) regardless of whether they gave a voluntary reason as well.

Figure 34 compares responses from the 2005 and 2007 Media Literacy Audits, and also shows 2007 responses for each of the age groups.

Figure 34: Home internet access intentions, 2005 and 2007, by age



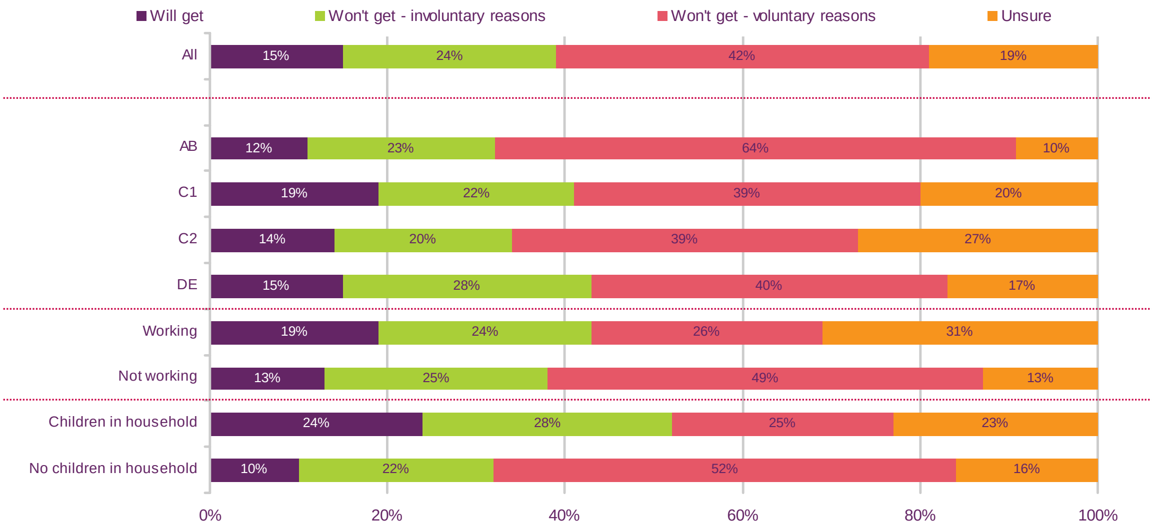
IN18/ IN20 – Can you tell me if you intend to get internet access at home in the next year or so?/ And can you tell me why that is?
Base: All adults aged 16+ who do not have internet access at home (1631 in 2005, 1222 in 2007, 133 aged 16-24, 176 aged 25-34, 191 aged 35-44, 155 aged 45-54, 169 aged 55-64, 398 aged 65+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Around one in seven adults intend to get internet access in the next 12 months - this is similar to the level of intention expressed in 2005. Intention is higher for younger adults, and lower for those aged 45 and over, to the point where few of those aged 65 and over intend to get the internet in the next 12 months.

Among those who do not intend to get access, more have voluntary reasons than have involuntary reasons. This, is again subject to variation by age; with younger adults more likely to have involuntary reasons for not intending to get the internet, with cost being the key reason.

Figure 35 shows intentions across other key demographic groups where findings differ significantly.

Figure 35: Home internet intentions, comparing key demographic groups



IN18/ IN20 – Can you tell me if you intend to get internet access at home in the next year or so?/ And can you tell me why that is?
Base: All adults aged 16+ who do not have internet access at home (1222 aged 16+, 106 AB, 259 C1, 259 C2, 591 DE, 380 working, 825 not working, 479 children in household, 691 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Across the socio-economic groups, those in the AB group who do not currently have access to the internet at home are less likely than all adults without the internet to say they intend to get access. Those in socio-economic group DE are most likely to have involuntary reasons for not getting the internet.

The other demographic group more likely to have involuntary reasons for not getting the internet is those with children at home.

3.6 Breadth of use of the internet

All adults who use the internet (regardless of where this is) were prompted with a list of 18 possible activities they could use the internet for and were asked to say for each one whether this is something they do, and how often they use the internet to do it.

The 18 activities people were asked about have been grouped into eight types of use, in order to assess breadth of use of the internet. By breadth of use we mean the extent to which the internet is used for a variety of purposes. The following list describes the categories:

- communication - relating to uses such as sending or receiving email or using online chat rooms or instant messaging (IM);
- work/ studies information - relating to finding information online for work or for studies;
- transactions - relating to banking or paying bills or buying things online;
- news - relating to looking at news websites;
- creativity - relating to looking at social networking sites (such as MySpace, Bebo, and Facebook) or maintaining a website or weblog;
- entertainment - relating to listening to radio or playing games online or looking at adult-only websites;

- leisure information - relating to finding information for leisure time including cinema and live music or information for booking a holiday; and

- public/ civic - relating to finding out about public services or looking at political/ campaign/ issues websites.

Figure 36 shows the proportion of all internet users and those in each age group who use the internet for each of these activities at least once a week. The average number of the original 18 possible uses are also shown.

Figure 36: Breadth of use of the internet, by age

IN13/14 – Can you please tell me from this list the types of things you currently do using the internet, and how often you do each?
Base: All adults aged 16+ who use the internet at home or elsewhere (1723 aged 16+, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Breadth of use of the internet has a clear link with age, with 16-19 year olds showing the broadest use and internet users aged 65 and over showing the least. For example, 3% of internet users aged 16-19 do not use the internet for any of these eight types of use at least once a week, compared with 27% of internet users aged 65 and over.

Figure 37 compares the breadth of use of the internet for key demographic groups, where there are significant differences.

Figure 37: Breadth of use of the internet, by key demographic group

IN13/14 – Can you please tell me from this list the types of things you currently do using the internet, and how often you do each?
Base: All adults aged 16+ who use the internet at home or elsewhere (1723 aged 16+, 838 males, 885 females, 439 AB, 597 C1, 351 C2, 327 DE, 1059 working, 644 not working, 989 children in household, 666 no children in household, 1271 urban, 452 rural)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Overall breadth of use of the internet does not vary between males and females, but males are more likely to use the internet for work/ studies information, for news and for entertainment.

Those in the AB and C1 socio-economic groups have a broader use of the internet than those in C2 and DE socio-economic groups. Using it for work/ studies information is the greatest difference in use between these two groups.

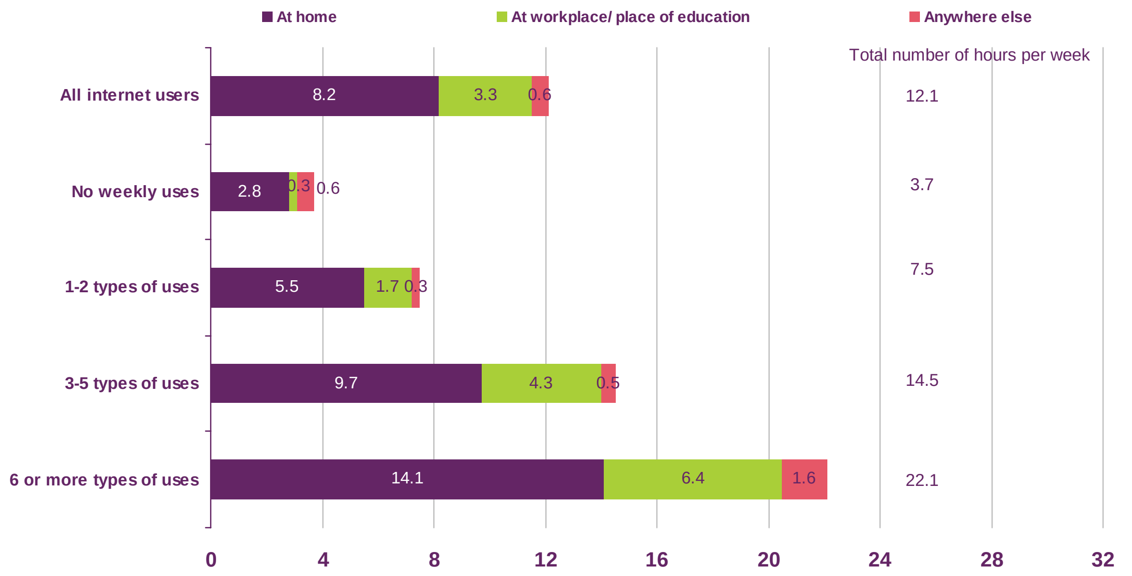
Overall breadth of use of the internet does not vary between those who are working and those who are not working. Those who are working are more likely to use the internet for communication, for work/ studies information, and for transactions, while those who are not working are more likely to use the internet for creativity (principally using social networking sites).

Nor does overall breadth of use of the internet vary between those who have children in the household and those who do not. Although those with no children in the household are more likely to use the internet for work/ studies information and for creativity (principally using social networking sites).

People in urban areas use the internet more widely than those in rural areas, through using the internet for communication, for work/ studies information, and for news. This is perhaps not surprising, as they spend more time on the internet in general.

As might be expected, those with a broader use of the internet are also heavier users, as shown in Figure 38.

Figure 38: Weekly volume of internet use, by breadth of use of the internet

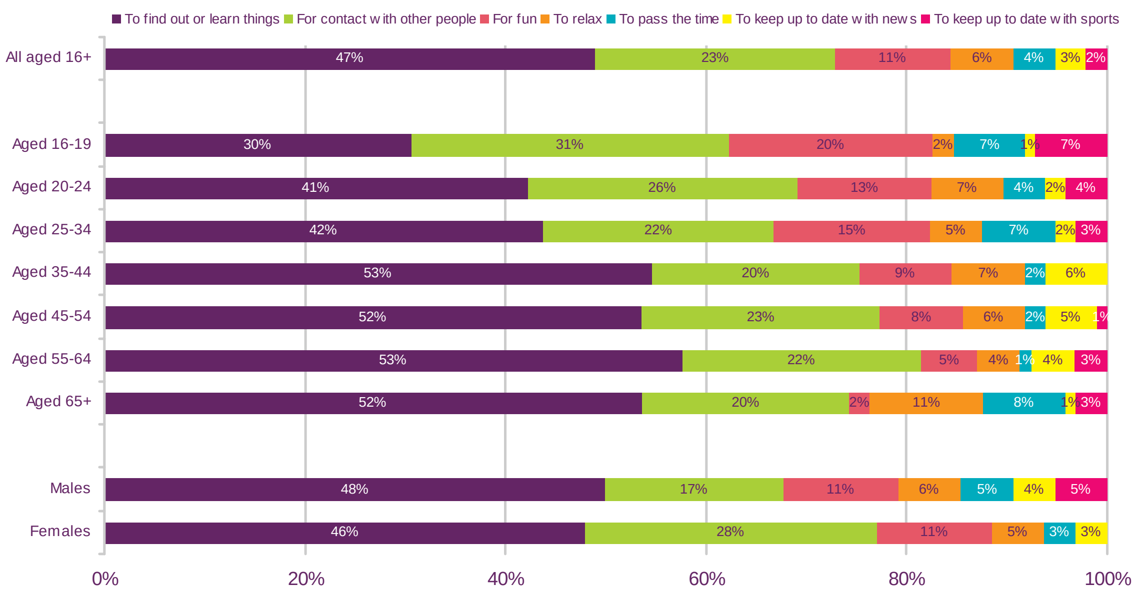


IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
Base: All adults aged 16+ who use the internet at home or elsewhere (1723 internet users, 263 with no weekly uses, 572 with 1-2 types of use per week, 588 with 3-5 types of use per week, 300 with six or more types of use per week)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

3.7 Main reason for using the internet

All adults using the internet at home or elsewhere were prompted with a list of possible reasons for using the internet and were asked to say which, if any, were applicable to them. Having made this selection, they were then asked to choose one main reason from the list. Figure 39 shows the main reason given by all adults, as well as by age and gender.

Figure 39: Main reason for using the internet, by age and gender



IN51 – Which one is your main reason for using the internet?
Base: Adults aged 16+ who use the internet at home or elsewhere (1723 aged 16+, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, a56 aged 55-64, 103 aged 65+, 838 males, 885 females)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

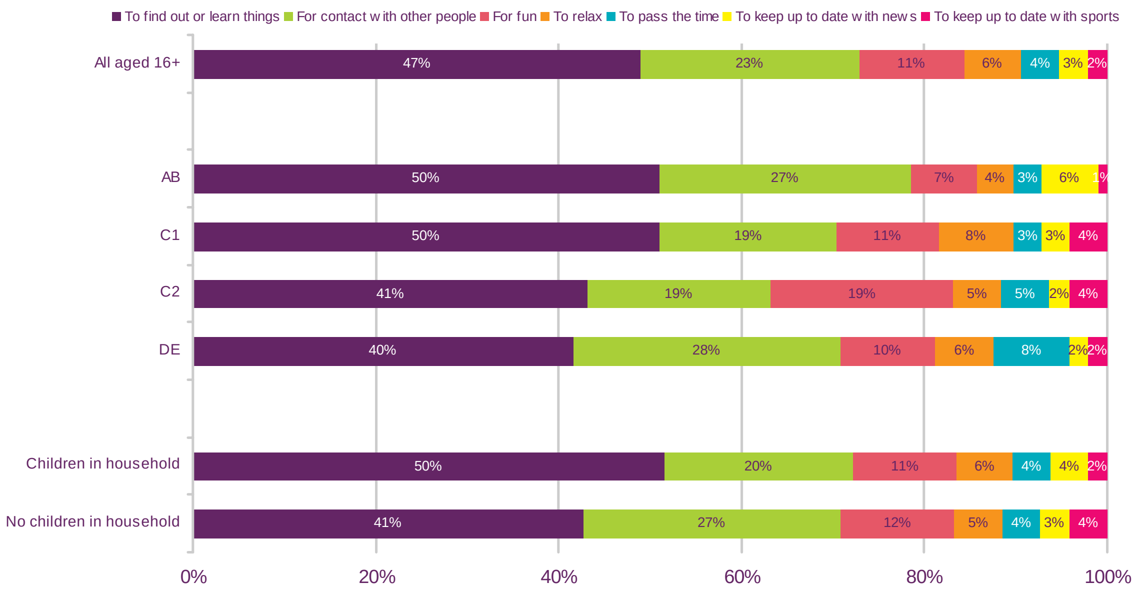
While half (47%) of all adults who use the internet choose *finding out or learning things* as their main reason for using the internet, this is less likely to be chosen as the main reason by the youngest adults (aged 16-19). Among those aged 16-19 *using the internet for contact with other people* is the joint highest reason (along with *to find out or learn things*).

One in five of the youngest adults, aged 16-19, choose *fun* as their main reason for using the internet, but this reason drops to one in ten of 35-44s, and one in twenty of over-55s.

The main reason for using the internet also varies by gender, although the majority of both males and females choose *finding out or learning things* as their main reason. Males are more likely to choose *keeping up to date with sports* as their main reason for using the internet and females are more likely to choose *contact with other people* as their main reason.

Figure 40 shows the main reasons given by adults for using the internet in the other key demographic groups, where findings differ significantly.

Figure 40: Main reason for using the internet, by key demographic groups



IN51 – Which one is your main reason for using the internet?
Base: Adults aged 16+ who use the internet at home or elsewhere (1723 aged 16+, 439 AB, 597 C1, 351 C2, 327 DE, 989 children in household, 666 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

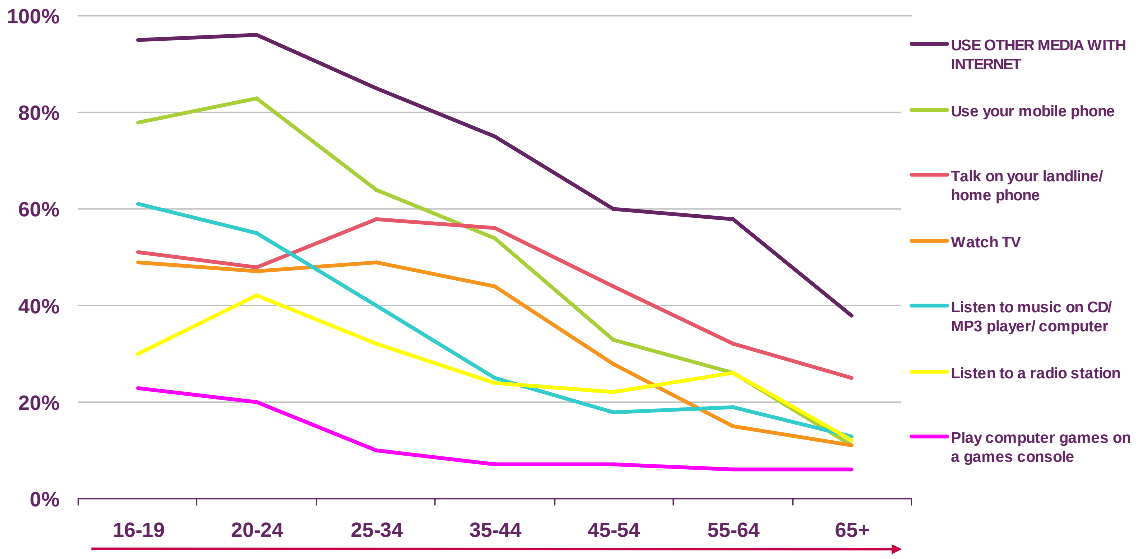
Adults in each of the socio-economic groups choose *finding out or learning things* above the other options as their main reason for using the internet. Adults in AB and DE households are more likely than all internet users to choose *contact with other people*, while those in C2 households are more likely to choose *fun,* compared to all internet users.

Those with children in the household are more likely to choose *finding out or learning things* as their main reason for using the internet. In contrast, those without children in the household are more likely to choose *contact with other people* as their main reason for using the internet.

3.8 Using other media while using the internet

All adults who use the internet at home (56% of all UK adults) were prompted with a list of six other media activities and asked whether they use any of these devices at the same time as the internet. Figure 41 shows the proportion of adults in each age group who use the internet and carry out each of the other media activities at the same time, either most times, or sometimes, when they use the internet.

Figure 41: Using other media while using the internet, by age



IN4A-F – Do you ever use the internet at home and do these other things at the same time? Is that most times or sometimes when you use the internet? (SHOWS % STATING THEY DO THIS 'MOST TIMES' OR 'SOMETIMES')
Base: Adults aged 16+ who use the internet at home (1514 aged 16+, 157 aged 16=19, 111 aged 20-24, 285 aged 25-34, 431 aged 35-44, 291 aged 45-54, 140 aged 55-64, 95 aged 65+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

It is clear that using more another media device at the same time as using the internet is most common for the youngest adults and least common for the oldest adults. To some extent this will be related to lower ownership of other media among older people. However, the levels of ownership of media such as mobile phones and the internet shown in Figure 3 do not decline across each age group to the extent shown in Figure 41, so we must conclude that age is a factor in itself.

Not only are younger people more likely than older people to use other media while using the internet, they are also using a broader range of other media.

Using another media device while using the internet is at a similar level as using another media device while watching television (74% and 69% respectively).

Figure 42 shows the incidence of using other media while using the internet for the other key demographic groups, where findings differ significantly. The additional media ever used at the same time as the internet have been stacked alongside each other to give an indication of the breadth of use of other media. In addition, a dotted vertical line is shown to mark the breadth of use of other media for adults as a whole.

Figure 42: Using other media while using the internet, by key demographic group

IN4A-F – Do you ever use the internet at home and do these other things at the same time? Is that most times or sometimes when you use the internet? (SHOWS % STATING THEY DO THIS 'MOST TIMES' OR 'SOMETIMES')
Base: Adults aged 16+ who use the internet at home (1514 aged 16+, 738 males, 776 females, 414 AB, 531 C1, 306 C2, 258 DE, 954 working, 543 not working, 894 children in household, 543 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

There is no difference between males and females in the overall extent to which they use these other media while using the internet. However, there are some differences in terms of the particular media they use:

- males are more likely than females to listen to a music player or play computer games on a games console while using the internet; and
- females are more likely than males to talk on a landline/ home phone while using the internet.

The only differences between internet users by socio-economic group are that those in AB households are more likely to talk on a landline while using the internet, and those in C1 households are more likely to play computer games on a games console while using the internet.

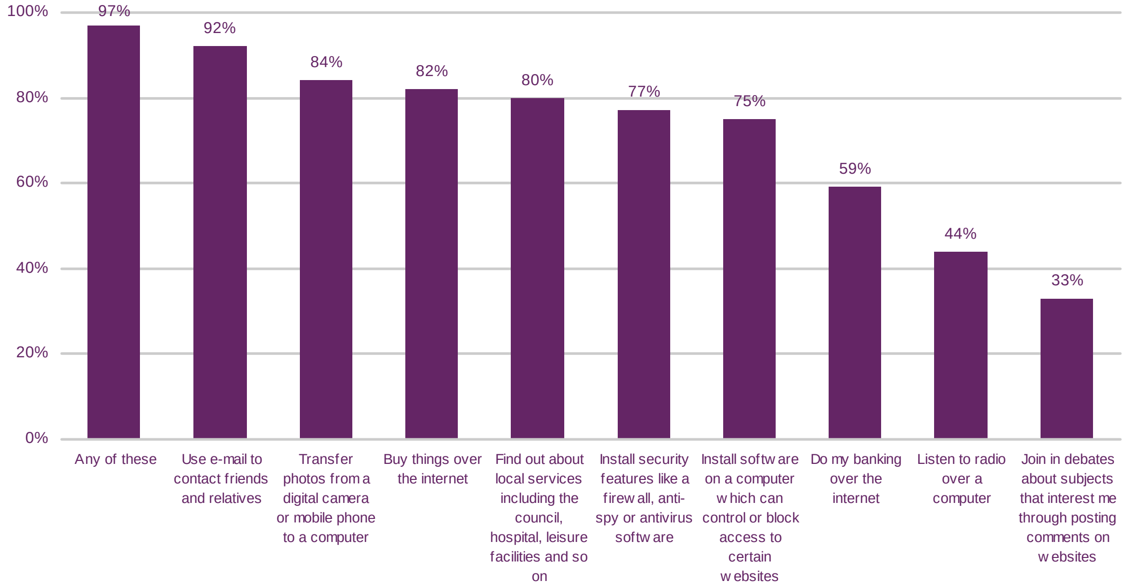
Those who are working are more likely to use any other media while using the internet.

Those with children in the household are more likely to talk on a landline while using the internet. Those without children in the household are more likely to listen to a music player while using the internet.

3.9 Interest in internet/ PC/ laptop functions

Those who use the internet at home or elsewhere (63%) were prompted with nine tasks or functions that could be carried out on the internet or a PC/ laptop. For each function, they were asked to say if this was something they were interested in. Figure 43 shows the responses from all who use the internet. The functions are shown in rank order of interest among all adults who use the internet.

Figure 43: Interest in internet/ PC/ laptop functions among internet users



IN7-8 – I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I'd like you to say which of the options on the card applies to you
Base: All adults aged 16+ who use the internet at home or elsewhere (1723)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Interest in these functions is high; almost all internet users are interested in at least one of the nine functions, and over half are interested in seven of the nine functions.

Table 6 compares levels of interest in each of the functions across the age groups covered.

Table 6: Interest in internet/ PC/ laptop functions, by age

	All internet users	Aged 16-19	Aged 20-24	Aged 25-34	Aged 35-44	Aged 45-54	Aged 55-64	Aged 65+
	(1723)	(186)	(150)	(332)	(473)	(319)	(156)	(103)
	%	%	%	%	%	%	%	%
ANY OF THESE	97	99	99	97	97	98	94	93
Use email to contact friends and relatives	91	94	90	91	92	90	85	90
Transfer photos from a digital camera or mobile phone to a computer	83	88	88	86	86	81	74	72
Buy things over the internet	81	77	85	86	80	82	77	68
Install security features like a firewall, anti-spy or antivirus software	79	78	80	83	85	77	71	58
Find out about local services including the council, hospital, leisure facilities and so on	76	60	77	79	81	78	76	67
Install software on a computer which can control or block access to certain websites	74	75	68	79	80	76	61	53
Do my banking over the internet	58	43	64	65	64	62	43	41
Listen to radio over a computer	43	48	58	49	44	36	40	15
Join in debates about subjects that interest me through posting comments on websites	33	35	44	39	33	28	25	11
Mean number of functions of interest (out of 9)	6.2	6.0	6.5	6.6	6.4	6.1	5.5	4.8

IN7 – I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I'd like you to say which of the options on the card applies to you.
Base: All adults aged 16+ who use the internet at home or elsewhere
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Those aged 20-24 are interested in more of these functions than internet users as a whole.

Interest in the two functions relating to blocking content (installing security features and installing software) is highest among those aged 35-44, reflecting the higher incidence of young children in these households.

Table 7 compares levels of interest in each of the functions across the other key demographic groups where responses differ significantly.

Table 7: Interest in internet/ PC/ laptop functions, by key demographic groups

	All internet users	Males	Females	AB	C1	C2	DE
	(1723)	(838)	(885)	(439)	(597)	(351)	(327)
	%	%	%	%	%	%	%
ANY OF THESE	97	97	97	99	97	97	94
Use email to contact friends and relatives	91	90	92	95	90	89	85
Transfer photos from a digital camera or mobile phone to a computer	83	85	81	85	86	84	73
Buy things over the internet	81	80	82	89	81	79	67
Install security features like a firewall, anti-spy or antivirus software	79	84	74	83	79	78	72
Find out about local services including the council, hospital, leisure facilities and so on	76	74	79	84	76	69	70
Install software on a computer which can control or block access to certain websites	74	78	70	78	73	72	68
Do my banking over the internet	58	56	60	66	59	51	49
Listen to radio over a computer	43	45	42	47	47	37	36
Join in debates about subjects that interest me through posting comments on websites	33	34	31	35	34	27	28
Mean number of functions of interest (out of 9)	6.2	6.2	6.1	6.6	6.3	5.9	5.5

IN7 – I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I'd like you to say which of the options on the card applies to you.
Base: All adults aged 16+ who use the internet at home or elsewhere
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

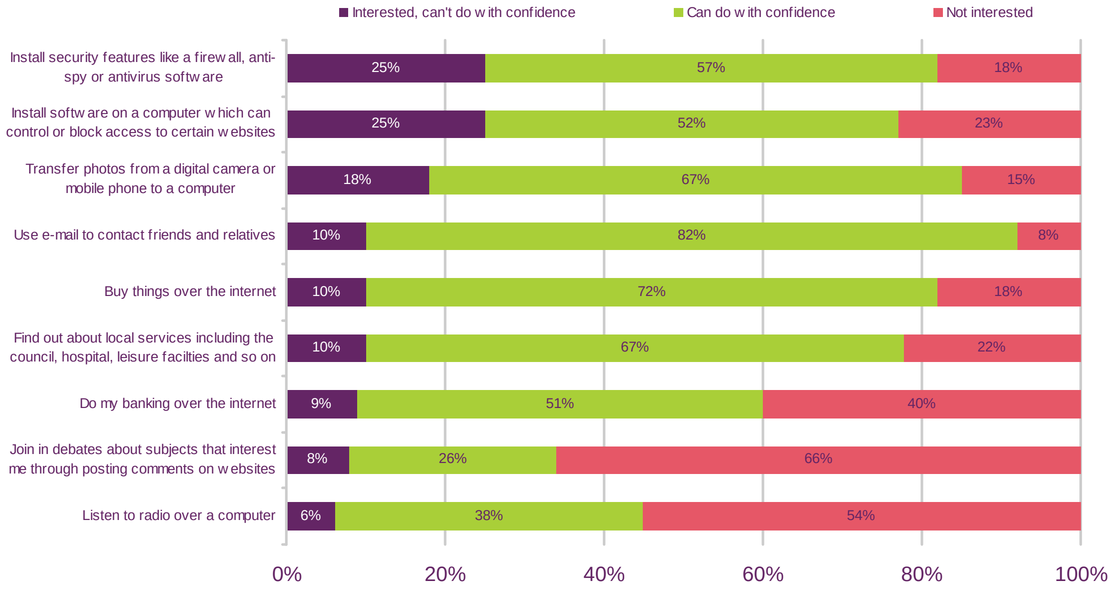
Males are, more interested in several specific functions: transferring photos, installing security features and installing software, while females are more interested in finding out about local services.

By socio-economic group, those in AB households are more interested than internet users as a whole in the nine functions, and specifically in using email, buying things, finding out about local services, installing software, and doing their banking over the internet. By contrast, those in DE households are less interested than internet users as a whole in each of the nine functions.

3.10 Confidence with internet functions among internet users

Those who use the internet were asked whether they were interested in the various functions and whether they could use the functions with confidence. Figure 44 splits all internet users into one of three groups; those who are not interested, those who are interested and can do the task with confidence, and those who are interested but cannot do it with confidence. This gap in confidence shown on the far left of Figure 44 is of particular interest in assessing media literacy, and is shown in rank order.

Figure 44: Confidence with internet/ PC/ laptop functions among internet users



IN7A-I – Please look at the options shown on this card. I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I'd like you to say which of the options on the card applies to you.
Base: Adults aged 16+ who use the internet at home or elsewhere (1723)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

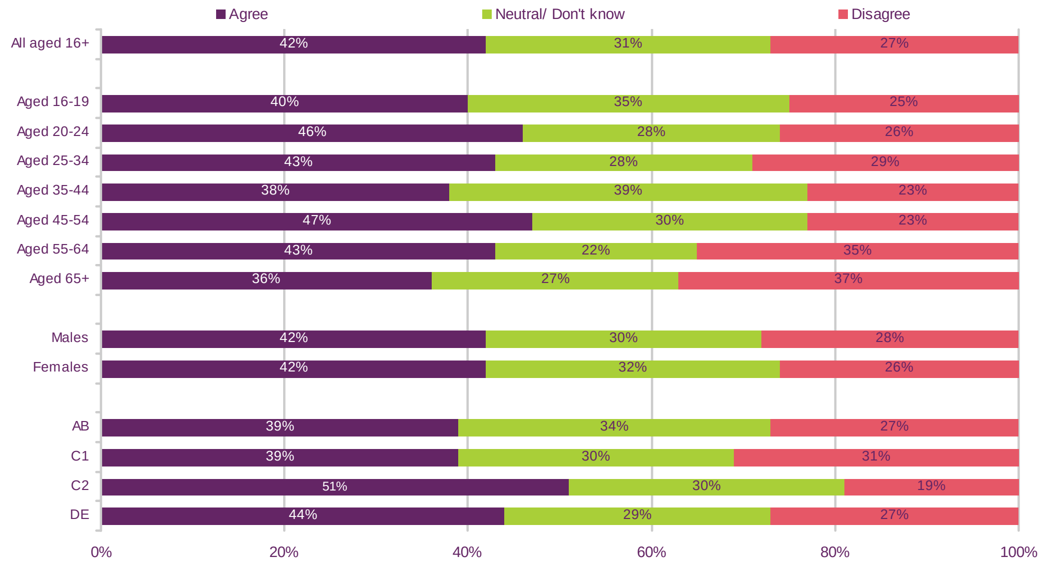
The top two functions shown in Figure 44 stand out in terms of having a larger confidence gap, with over a quarter of internet users being interested, but not able to do either task with confidence. Given that these tasks relate to internet security, this larger gap is particularly important.

Those more likely to be interested, but not able to perform these blocking tasks with confidence are more likely to be aged 35-44, and females.

3.11 Trust in website content

Adults who use the internet at home or elsewhere were asked to indicate the extent to which they agree or disagree with the statement *When I visit websites, I tend to trust what I read or see*. This statement encompasses all content heard or viewed by the respondent on the internet. Figure 45 shows responses from all adults who use the internet, as well by age group, gender and socio-economic group.

Figure 45: Trust in website content, by age and key demographic groups



IN49A – *'When I visit websites, I tend to trust what I read or see'*
Base: All adults aged 16+ who use the internet (2887 aged 16+, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+, 838 males, 885 females, 439 AB, 597 C1, 351 C2, 327 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Among all adults who use the internet, 42% agree that they tend to trust what they read or see, with 31% saying that they neither agree nor disagree. One in four internet users disagree with the statement, and this is more common among those aged 55 and over. The level of disagreement does not vary by gender.

Those in the C2 socio-economic group are more likely than all internet users to agree that they tend to trust what they read or see, as is also the case with television viewing among this group.

3.12 The role of the internet

All internet users (63% of all adults) were prompted with a series of statements about the internet and were asked to indicate the extent to which they agreed or disagreed with each one.

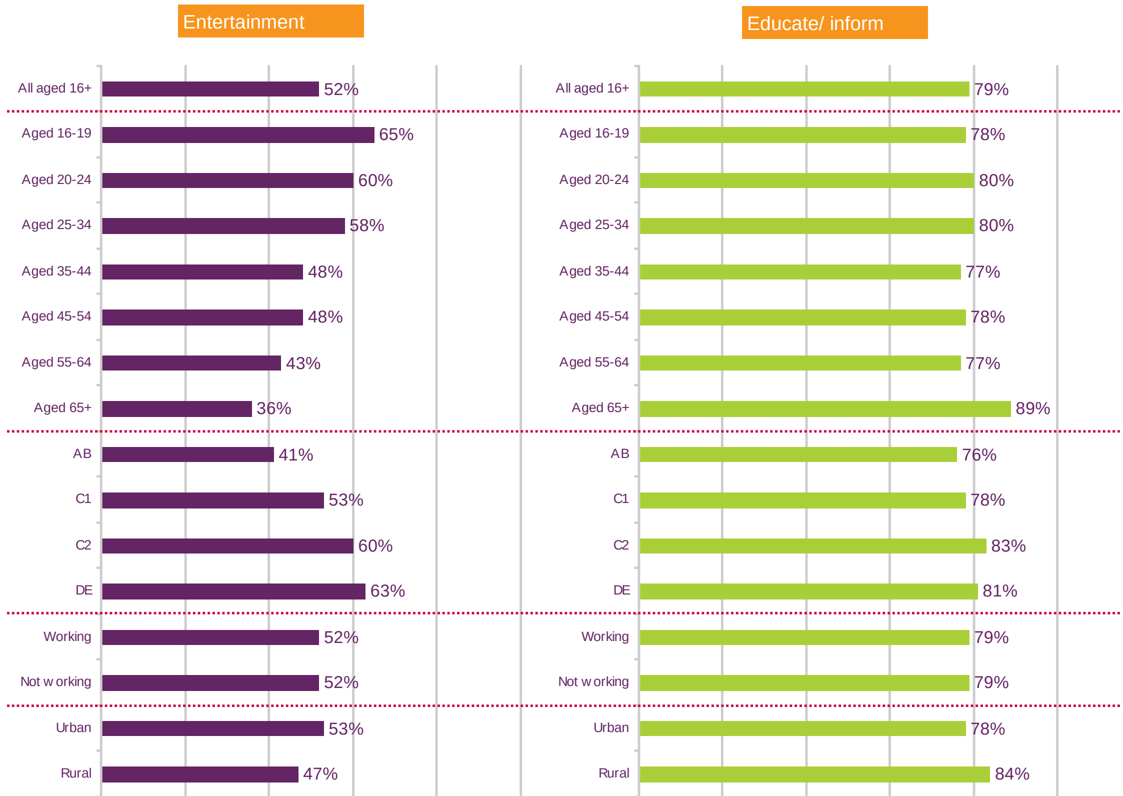
Figure 46 shows responses of internet users to:

- *the main role of the internet should be to provide entertainment;* and
- *the main role of the internet should be to inform and educate people.*

For each statement Figure 46 shows the level of agreement (either strongly or slightly).

Responses are shown for all adults who use the internet, each of the age groups, and the key demographic groups where responses differ significantly.

Figure 46: Role of the internet – *entertainment* and *education*



IN48D-E – The main role of the internet should be to provide entertainment/ The main role of the internet should be to inform and educate people
Base: All adults aged 16+ who use the internet (1723 aged 16+, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+ , 439 AB, 597 C1, 351 C2, 327 DE, 1059 working, 644 not working, 1271 urban, 452 rural)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Across all internet users, half agree that *the main role of the internet should be to provide entertainment* and four in five agree that *the main role of the internet should be to inform and educate people*. While the internet cannot be said to have a primary role, it is more likely to be seen as having a role to educate and inform than to entertain.

Those aged under 35, those in C2 and DE socio-economic groups and those in urban areas are more likely than all internet users to agree that *the main role of the internet is for entertainment.*

Fewer differences exist within the overall population in terms of agreement that *the main role of the internet should be to inform and educate people*. This view is more common among internet users aged 65 and over and those in rural areas.

Half (47%) of all internet users agree with both of these statements about the main role of the internet, and this is more common among those aged under 35 and those in the C2 or DE socio-economic group.

3.13 Attitudes towards the internet

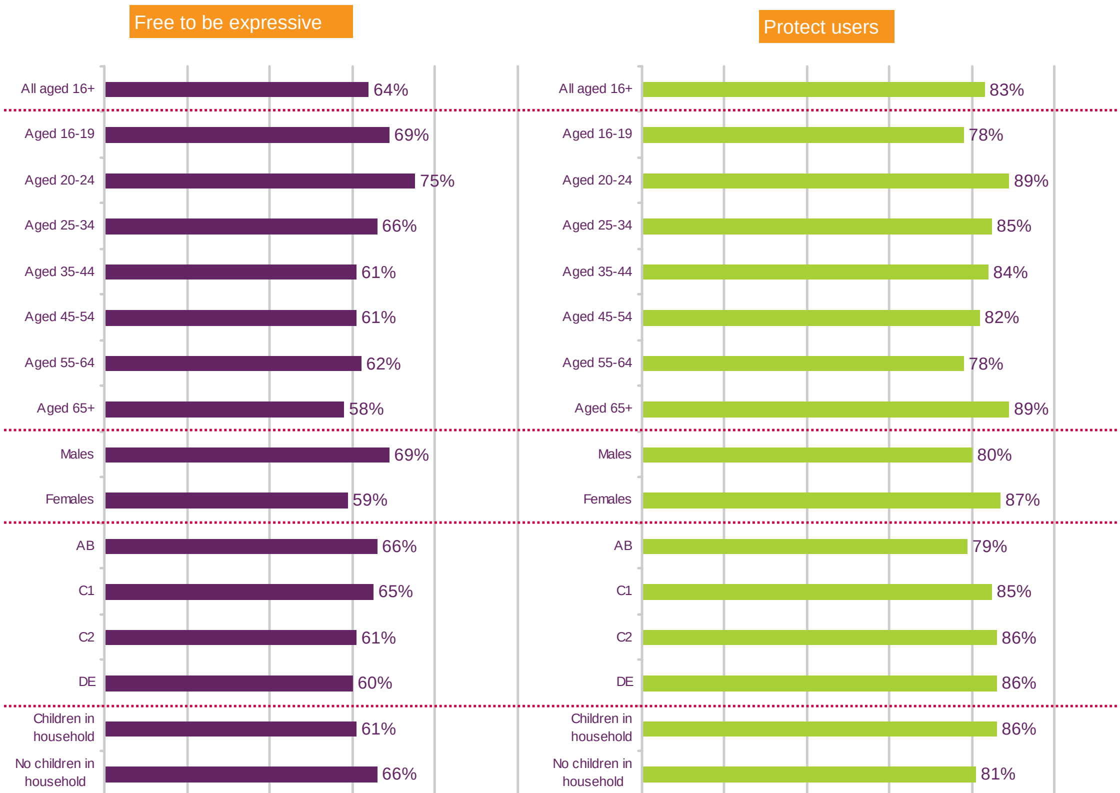
Figure 47 shows internet users' responses to two statements:

- *internet sites must be free to be expressive and creative;* and
- *internet users must be protected from seeing inappropriate or offensive content.*

For each statement Figure 47 shows the proportion agreeing (either strongly or slightly).

Responses are shown for all adults who use the internet, each of the age groups, and the key demographic groups where findings differ significantly.

Figure 47: Attitudes towards the internet – *free to be expressive and protected from content*



IN48A-B – Internet sites must be free to be expressive and creative/ Internet users must be protected from seeing inappropriate or offensive content
Base: All adults aged 16+ who use the internet (1723 aged 16+, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+ , 838 males, 885 females, 439 AB, 597 C1, 351 C2, 327 DE, 989 children in household, 666 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Among all adults who use the internet, two-thirds agree that *internet sites should be free to be expressive and creative*, and four in five agree that *internet users should be protected from inappropriate or offensive content*.

Over half (55%) of all adults who use the internet agree with both of these statements about the internet, with a higher degree of overlap among internet users aged under 25.

Overall levels of agreement and disagreement with each statement have not changed since the 2005 Media Literacy Audit.

Certain groups of adults are more likely to agree that *internet sites must be free to be expressive and creative*. Users aged under 25 are more likely to respond in this way, as are males and those with no children in the household.

Similarly, certain groups of adults are more likely to agree that internet users must be protected from seeing inappropriate or offensive content. This view is more common among females, and those with children in the household. Adults in the AB socio-economic group stand out through being less likely to agree that users should be protected, although this is still the view of the majority.

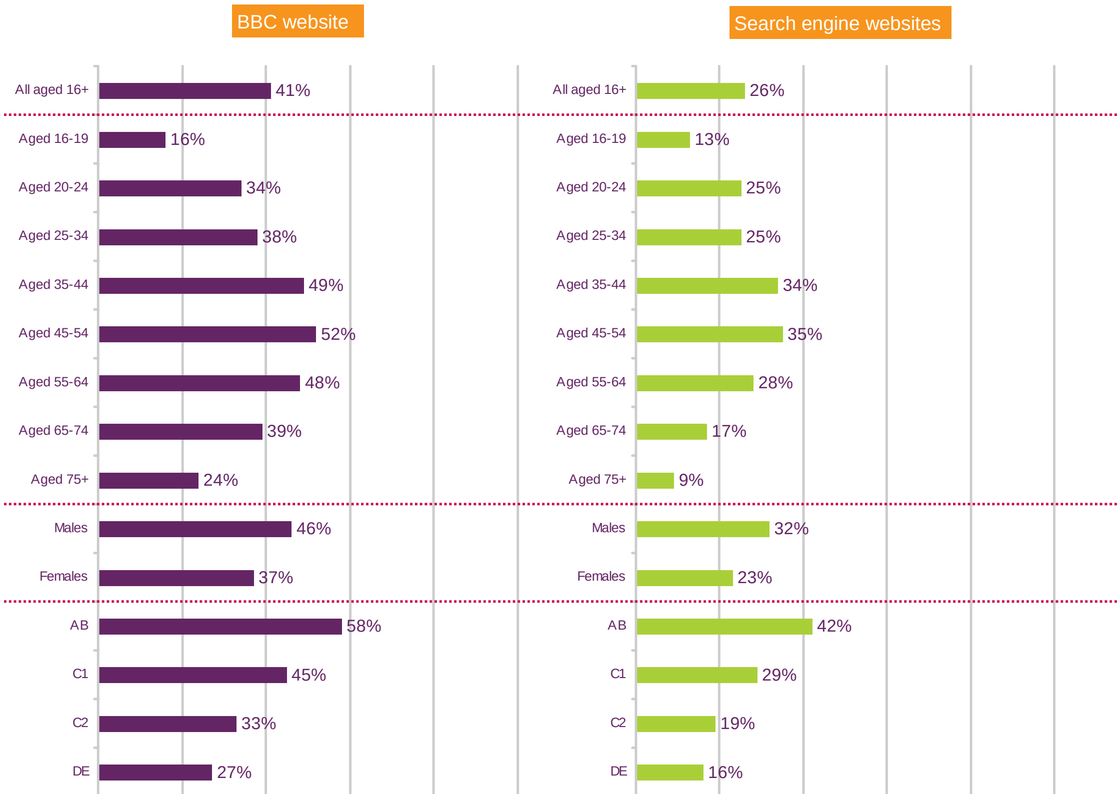
3.14 Understanding sources of website funding

All adults were asked how the BBC website is mainly funded and also how search engine websites (such as Google or Ask.com) are mainly funded.

Funding of websites
The BBC website is funded by the licence fee and search engine websites such as Google are funded by advertising.

Figure 48 shows the proportion giving the correct responses to questions about website funding. Responses are shown for all adults aged 16 and over, as well as for each of the age groups and the key demographic groups showing differences in responses to this question.

Figure 48: Correct understanding of how websites are mainly funded



IN34/ IN35 – How do you think the BBC's website is mainly funded?/ How do you think search engine websites such as Google or Ask.com are mainly funded?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+ , 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Two in five UK adults know how the BBC website is mainly funded and one in four know how search engine websites are funded; so awareness is higher for the BBC website funding. Awareness is considerably lower than for the more established media device of television (as shown in Figure 22).

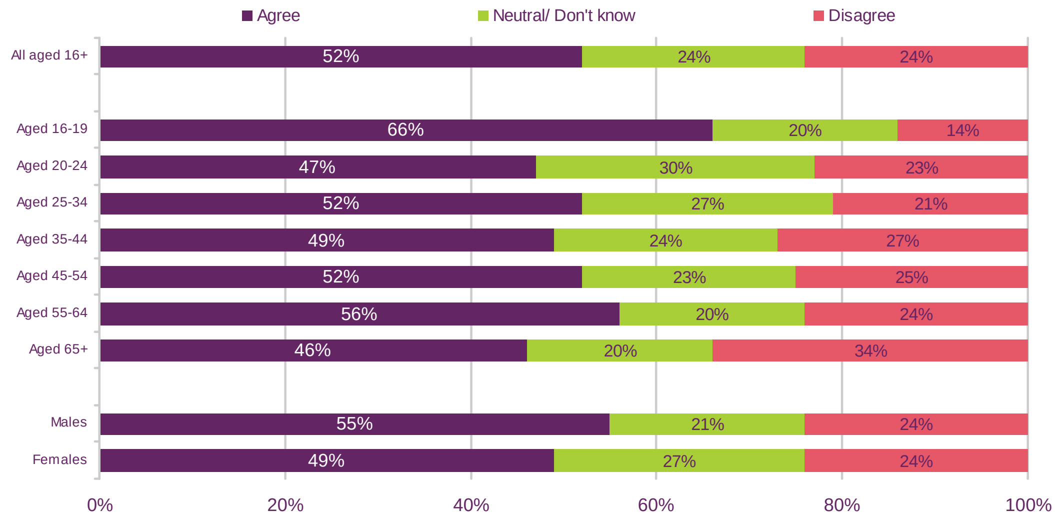
Compared to the 2005 Media Literacy Audit, awareness of BBC website funding has decreased (from 46%), while awareness of search engine website funding is unchanged.

Across both types of website, awareness of funding is lower for the youngest and oldest adults, females (compared to males), and those in the DE socio-economic group. Only a minority of adults aged 65 and over, and a minority of adults in the DE socio-economic group, use the internet at all, and so it is perhaps not surprising that awareness of website funding is lower for these adults. Among adults aged under 25, however, the majority are internet users.

Looking only at responses from internet users, awareness of BBC website funding is below the average UK level for all internet users for under-35s and those in C2 or DE socio-economic group households. Older internet users, by contrast, are among the most aware that the BBC website is mainly funded by the licence fee.

Adults who use the internet were also asked to indicate the extent to which they agree or disagree with the statement *As long as the internet provides good websites it doesn't really matter who owns the websites or how they are funded*. Figure 49 shows responses from all internet users by age and gender.

Figure 49: Attitudes towards the internet – *doesn't matter who owns the websites or how they are funded*



IN48C– As long as the internet provides good websites it doesn't really matter who owns the channels or how they are funded
Base: All adults aged 16+ who use the internet (1723 aged 16+, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+ , 838 males, 885 females)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Half of all internet users agree with this statement, with one in four disagreeing.

There is a link with the age of the internet user, as the youngest users (aged 16-19) are more likely to agree that *it doesn't matter who owns the websites or how they are funded* and the oldest users (aged 65+) are more likely to disagree with this statement. Males are more likely than females to agree.

Compared to the 2005 Media Literacy Audit, the proportion agreeing that *it doesn't matter* has decreased and consequently there has been an increase in the levels of neutral responses.

3.15 Internet regulation

All adults were asked whether the internet is regulated, with a description[3] of a regulator provided if necessary.

Internet regulatory environment
There is no statutory regulatory body generally responsible for audiovisual content on the internet.

The BBC Trust, established by Royal Charter, issues a service licence for bbc.co.uk which encompasses BBC iPlayer and can consider any complaints about its content.

The Association for Television On-Demand (ATVOD) is a self-regulatory body committed to protecting consumers of on-demand audiovisual content on services provided by its

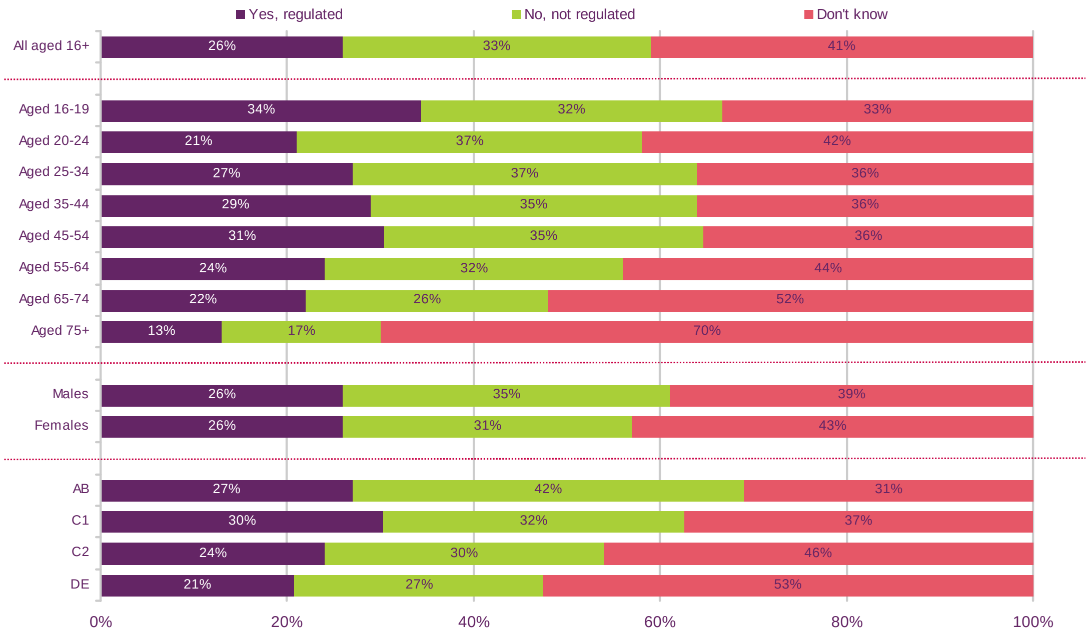
[3] A regulator is often called a 'watchdog' – it sets rules/ guidelines about content. People can also complain to the regulator if they feel a website has included something that they thought was inappropriate e.g. because it was offensive, harmful, inaccurate or unfair

members. Its current full members are BT, On Demand Group, Virgin Media, Channel 4, BBC (Affiliate Member), Tiscali, FilmFlex and ITV.

Sites based on user-generated content (UGC) are not subject to any statutory regulation, beyond the prohibition on illegal content.

Figure 50 shows responses from all adults, by age groups and the key demographic groups showing significant differences in responses to this question.

Figure 50: Is the internet regulated?



IN38 – As far as you know, is the internet regulated in terms of what can be shown and written?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

There is little consensus across UK adults as a whole, or among internet users specifically as to whether content on the internet is regulated, with the highest proportion of adults being unsure. Adults aged 65 and over, females and those in C2 or DE socio-economic group households are more likely to say they are unsure than others. The youngest adult group, aged 16-19, are the most likely to believe that internet content is regulated.

The proportion of adults who believe that internet content is regulated has fallen since the 2005 Media Literacy Audit; from 30% to 26%.

3.16 Concern about the internet

Adults were asked to mention, without prompting, any concerns they have about what is on the internet and were then asked to respond, using a scale, to say how concerned they are about what is on the internet.

The unprompted responses have been grouped into five themes, by type of concern:

- offensive content - relating to responses such as, *sexual content/ pornography, unsuitable for children* and *violent content*;

- risk to society/ values - relating to responses such as *paedophiles/ perverts masquerading as young people, online websites showing abuse of children, websites instructing how to be a terrorist* and *websites instructing how to commit suicide*;

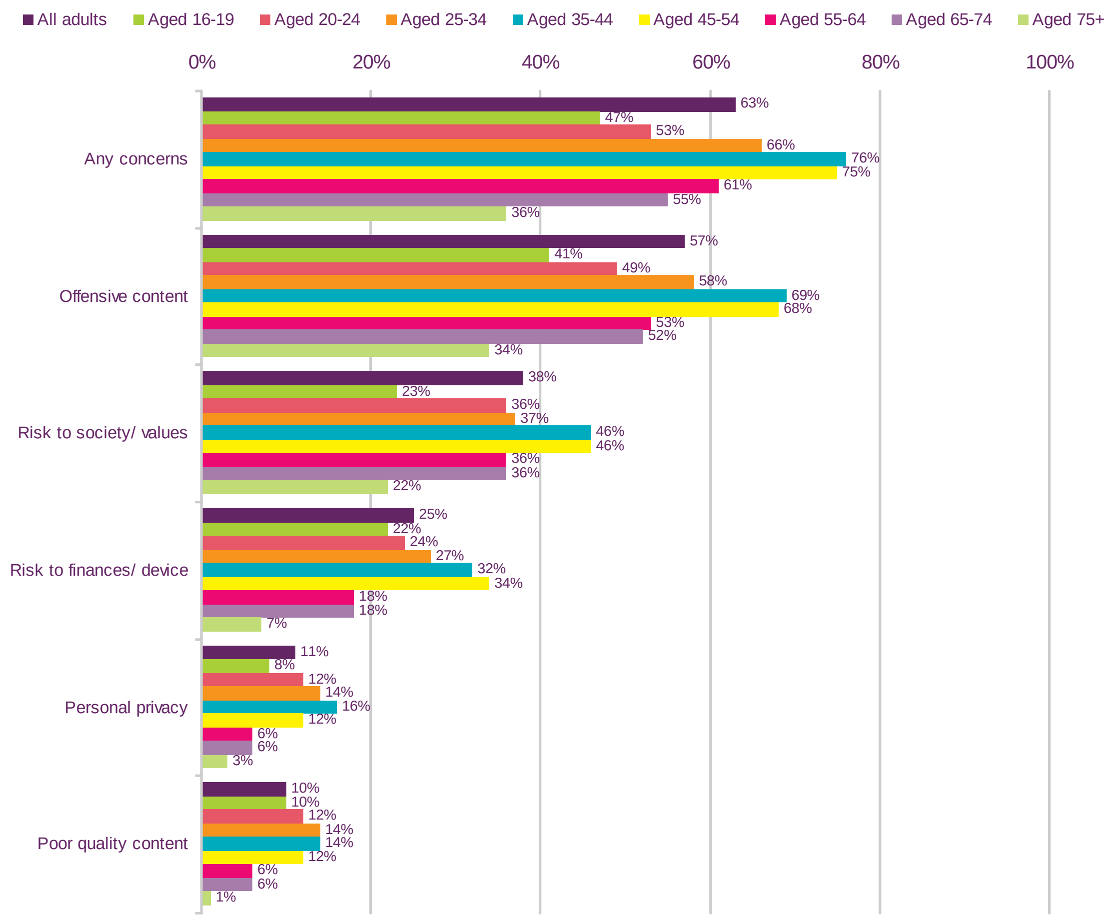
- risk to finances/ device - relating to responses such as *identity fraud/ others getting access to my personal detail, computer viruses/ bugs* and *insecure sites*;

- personal privacy - relating to responses such as *spam/ unwanted emails* and *claims for money/ phishing emails*; and

- poor quality content - relating to responses such as *pop-up adverts*.

Figure 51 shows responses from all adults regarding any concerns they have about what is on the internet, and from those in each of the age groups.

Figure 51: Concerns about what is on the internet, by age

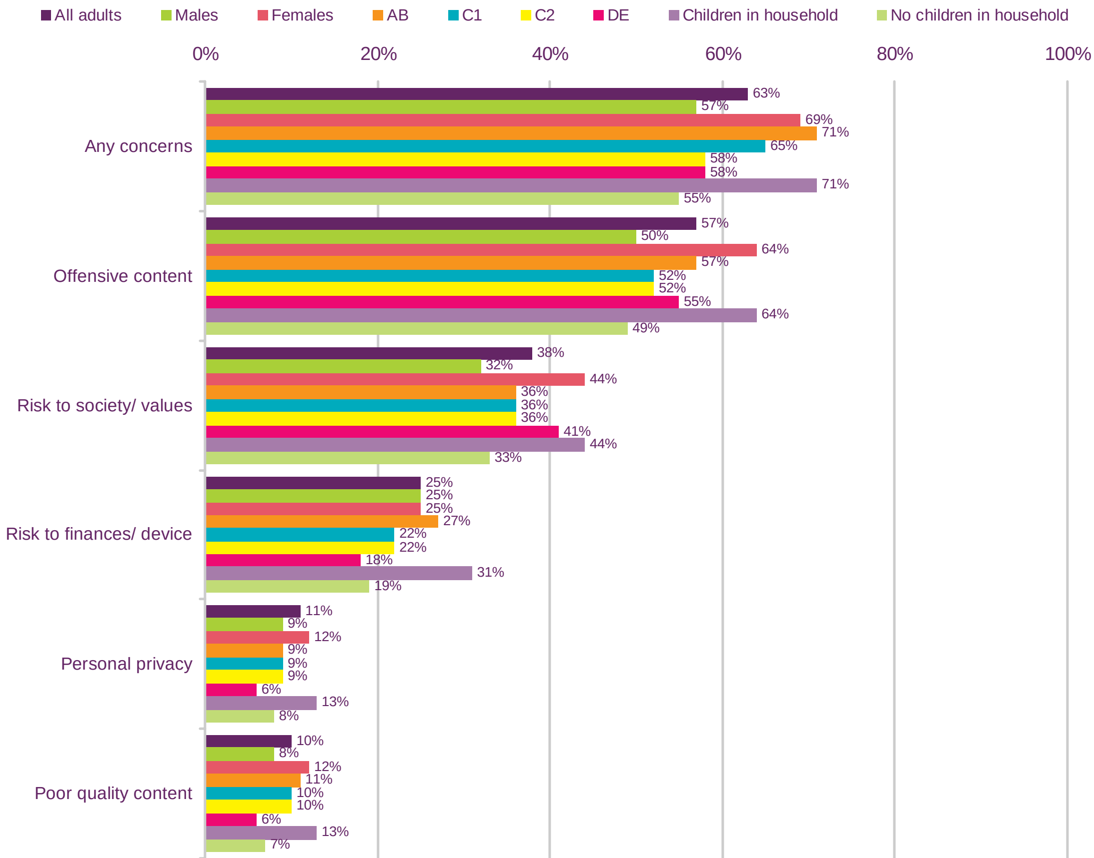


IN36 – Can you tell me if you have any concerns about what is on the internet? What sorts of things are you concerned about?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While two-thirds of all adults mention any concerns about what is on the internet, the youngest adults (aged under 25) and the oldest adults (aged 75 and over) are less likely to mention any concerns. Around half of all adults aged under 25 mention any concerns, compared to three-quarters of those aged between 35 and 54, and one-third of those aged 75 and over.

Figure 52 compares responses from the key demographic groups showing differences in responses to this question.

Figure 52: Concerns about what is on the internet, by key demographic groups



IN36 – Can you tell me if you have any concerns about what is on the internet? What sorts of things are you concerned about?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Females are more likely to mention any concerns about what is on the internet, with higher mentions for each of the themes shown in Figure 52, with the exception of risk to finances/ device.

Across the socio-economic groups, AB adults are more likely to mention a concern about what is on the internet than adults as a whole. Those in the AB socio-economic group are more likely to mention concerns about offensive content and risk to finances/ device.

Those with children in the household are more likely than those with no children in the household to mention any concerns about what is on the internet, and to mention concerns within each of the themes shown in Figure 52.

Among the 19% of adults (shown later, in Figure 53) who say they are very concerned about what is on the internet, almost all (93%) mention concerns related to offensive content.

Figure 53 shows the proportion of all adults who are either very concerned, or fairly concerned, about what is on the internet. Responses are shown for each of the age groups and the key demographic groups showing significant differences in responses to this question.

Figure 53: Degree of concern about what is on the internet

IN37 – Overall, how concerned are you about what is on the internet?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 Males, 1535 Females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

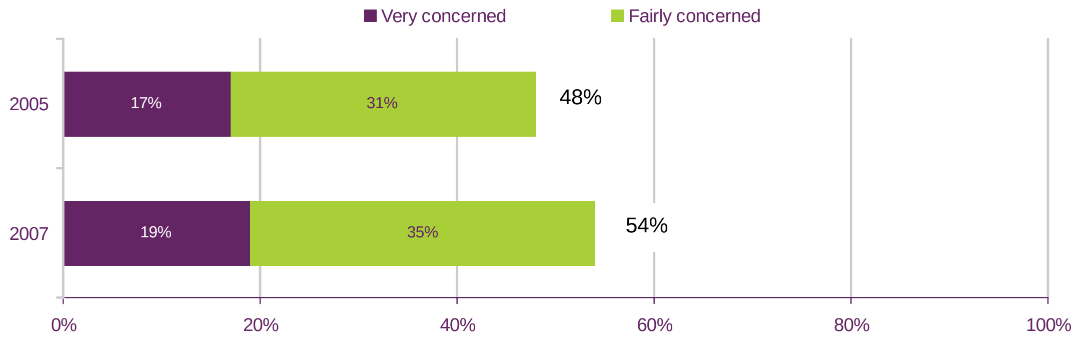
Over half of all UK adults (54%) are very or fairly concerned about what is on the internet, with two in three of these being fairly concerned, as opposed to very concerned. Concern about what is on the internet is greater than concern about what is on television (shown in Figure 28).

Concern about what is on the internet is higher among 35-54 year olds, and lower for the youngest and oldest adults. Females are more concerned about what is on the internet, as are those with children in the household and those in AB socio-economic group households.

Compared with all adults, the level of concern expressed by internet users about what is on the internet is higher; at 61% overall.

The level of concern about what is on the internet has increased since the 2005 Media Literacy Audit (from 48% to 54% of all adults), as shown in Figure 54.

Figure 54: Degree of concern about what is on the internet, comparing 2005 and 2007



IN37 – Overall, how concerned are you about what is on the internet?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Compared to 2005, concern among those aged 45-54, females, those in the C2 and DE socio-economic groups and those who are not working has increased above the UK average.

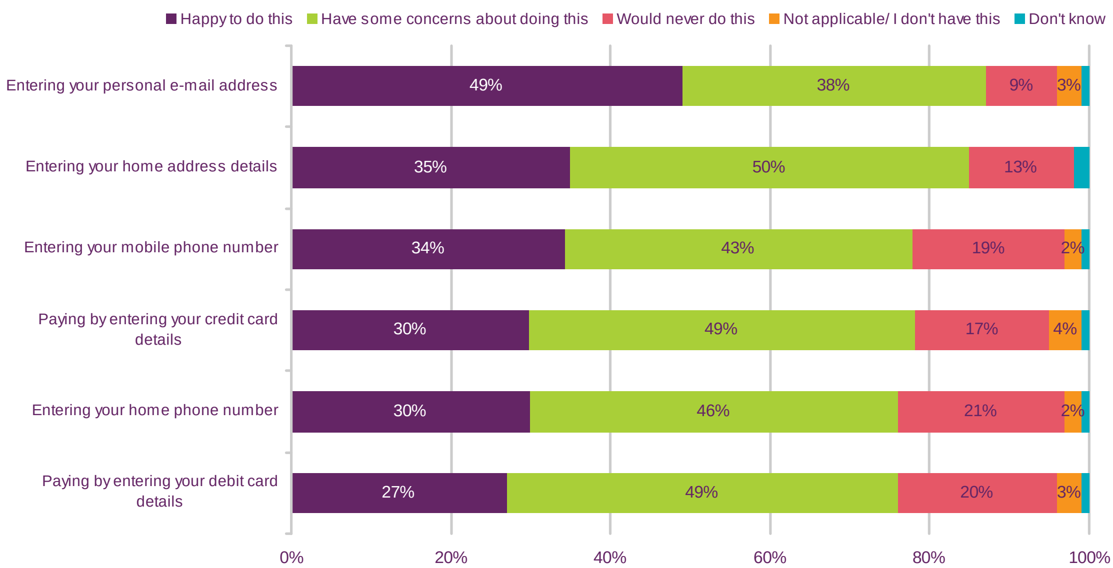
While around two-thirds of all adults (63%) mention specific concerns about what is on the internet, around half (54%) say they are very or fairly concerned about what is on the internet generally. This suggests that not all of the specific issues that people mention are serious enough to cause them a great deal of concern.

3.17 Online security concerns

Adults who use the internet were prompted with types of personal information a user can be asked to enter when registering on a new website. For each type of information, internet users were asked to use a scale to say how they would feel about providing this information online, in terms of any security concerns.

Figure 55 shows responses across all internet users, ranked by the proportion of users responding that they would be happy to provide each type of information.

Figure 55: Providing information online



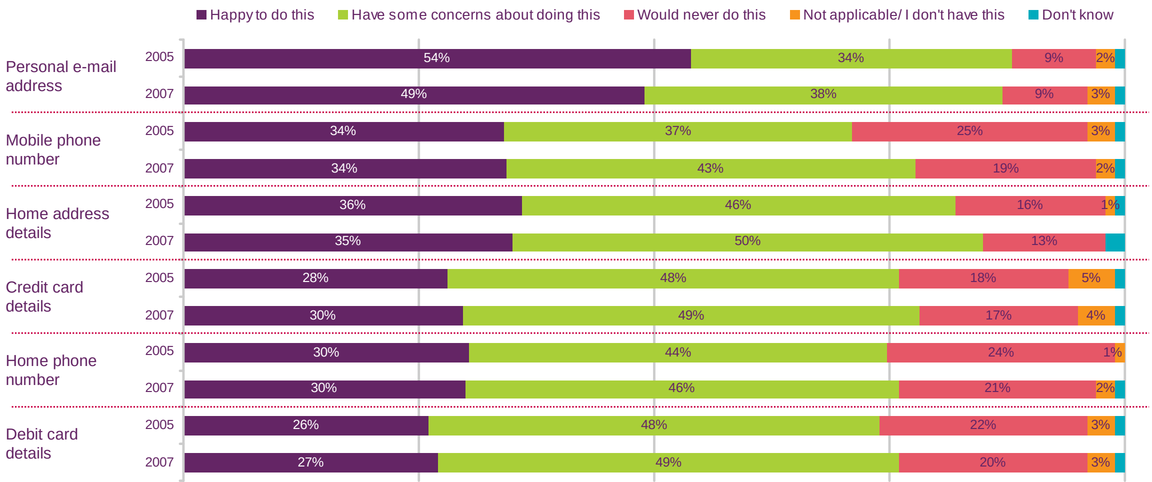
IN41 – Please look at the options shown on this card. I'm going to read out some details about information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns.
Base: Adults aged 16+ who use the internet at home or elsewhere (1723)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

One in ten internet users say they would never provide their personal email address or home address, while one in five would never provide their mobile phone number, credit or debit card details or home phone number. Across all six types of information, one-third (33%) of internet users say they would never provide any personal details. This reluctance to provide details is higher for the oldest internet users, aged 65 and over (50%), those in DE socio-economic group households (44%), and those who are not working (40%).

Those making the broadest use of the internet have fewer of these concerns, as do those who have ever bought online.

Concerns about providing information online from the 2005 and 2007 Media Literacy Audit surveys are compared in Figure 56.

Figure 56: Providing information online, 2005 and 2007

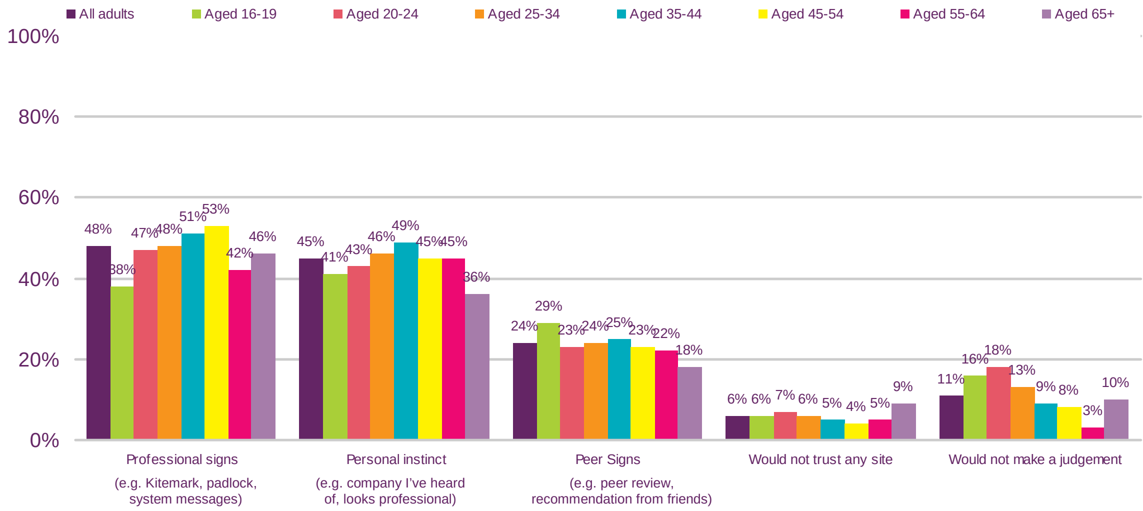


IN41 – Please look at the options shown on this card. I'm going to read out some details about information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns.
Base: Adults aged 16+ who use the internet at home or elsewhere (1468 in 2005, 1723 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

An increased number of internet users have some reservations about providing information online, but there has been a decrease in the proportion saying they would never provide their mobile phone, home phone number, or home address details. This suggests that people may be making more informed decisions.

We asked internet users whether they would make a judgement about a website before entering their personal details (phone number, address, card details). Those saying they would make a judgement about website security were then asked to say how they would do this. These spontaneous responses have been grouped into three categories, which are detailed below in Figure 57.

Figure 57: How users would judge whether a website is secure, by age



IN42 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) (Spontaneous responses)
Base: Adults aged 16+ who use the internet at home or elsewhere (1723 aged 16+, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

A majority of internet users say they would make a judgement about a website before entering personal details, with the two main types of checks being professional signs (such as the padlock symbol, system messages or the kitemark) and personal instinct (such as *a* known company or a professional look to the site).

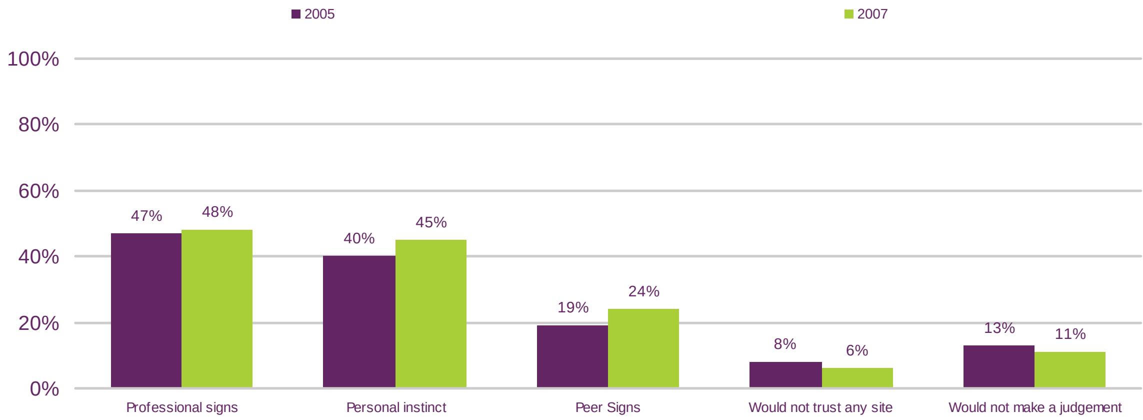
There are few differences in the ways people make judgements by the age of the internet user, but those aged from 35 to 54 are more likely to look for professional signs. The youngest internet users, aged under 25, are the most likely to say they would not make a judgement before entering personal details. Not making a judgement is also more common among males (13%) than females (8%), but otherwise does not vary across other demographic groups.

Those making the broadest use of the internet are more likely to make judgements before entering personal details by looking for professional signs, and this is also the case for those who have ever bought online.

Those who make judgements about new websites based on professional signs or personal instinct are more comfortable providing certain types of information online - credit or debit card details or home address details.

Figure 58 compares the 2005 and 2007 Media Literacy Audit surveys in terms of judgements people say they make before entering personal details online.

Figure 58: How users would judge whether a website is secure, 2005 and 2007

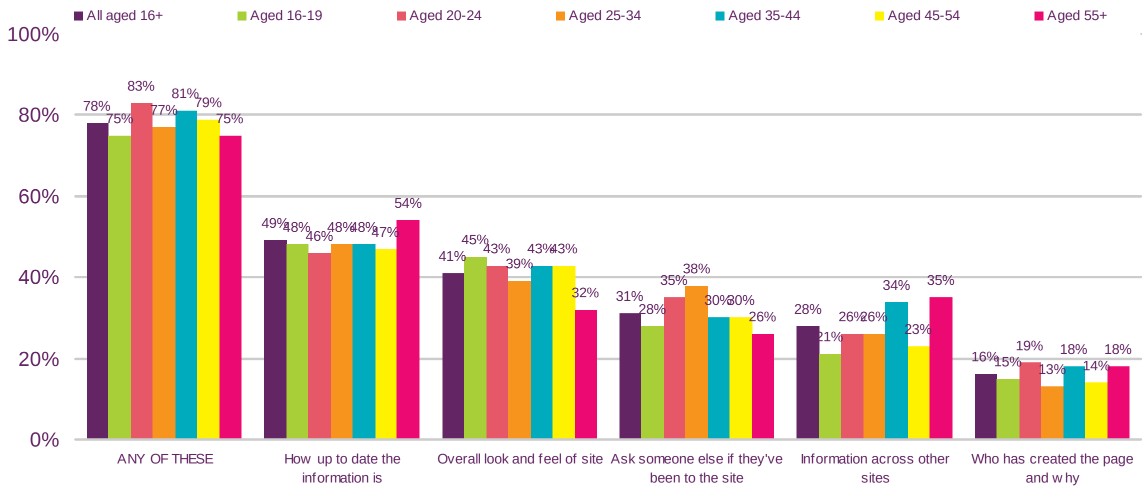


IN42 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address)
Base: Adults aged 16+ who use the internet at home or elsewhere 1468 in 2005, 1723 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The proportion of internet users who would make a judgement about a website before entering personal details has not changed since 2005. At the same time, judgements based on personal instinct or on peer feedback or signs (such as recommendation from a friend or peer reviews) have increased since 2005.

All internet users were prompted with a list of five options and were asked to say which, if any, of these they would check when visiting a website that was new to them. One in ten (8%) internet users say they do not visit new websites, and these users have been excluded from the analysis shown in Figure 59.

Figure 59: Checks made by users when visiting new websites, by age



IN16 – Thinking about new websites you visit, which, if any, of these things would you check?
Base: Adults aged 16+ who use the internet at home or elsewhere and ever visit new sites (1536 aged 16+, 167 aged 16-19, 144 aged 20-24, 307 aged 25-34, 426 aged 35-44, 426 aged 35-44, 282 aged 45-54, 207 aged 55+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Four in five internet users who ever visit websites that are new to them carry out some sort of check. No single age group is more or less likely, at an overall level, to carry out some sort of check.

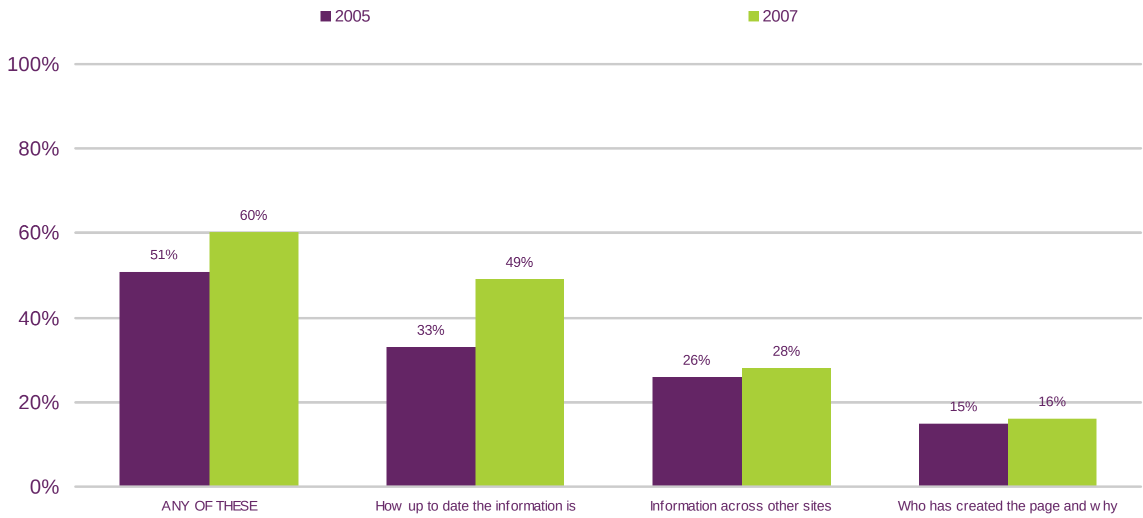
Half of those who visit websites that are new to them say they check how up-to-date the information is, with this being more common among older internet users, aged 55 and over.

Two in five check by assessing the overall look and feel of the site, and this does not vary by age.

Those making the broadest use of the internet are more likely than internet users as a whole to conduct checks when visiting a website that is new to them.

Additional response options were added to this question for the 2007 Media Literacy Audit compared to the equivalent question used in 2005. Figure 60 shows a comparison where possible.

Figure 60: Checks made by users when visiting new websites, 2005 and 2007



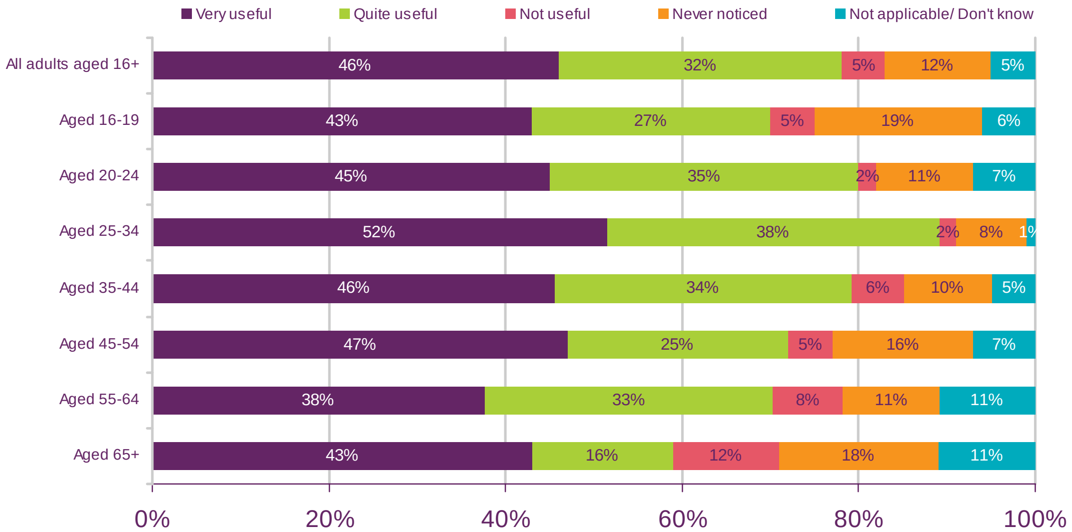
IN16 – Thinking about new websites you visit, which, if any, of these things would you check?
Base: Adults aged 16+ who use the internet at home or elsewhere and ever visit new sites (1536)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The incidence of making any of these three types of checks has increased since 2005, with this increase accounted for by the higher proportion of internet users who say that they check how up-to-date the information on the website is. The incidence of making checks by comparing some types of information across a number of websites, or by checking who has created the web page and why, has not changed since 2005.

Those internet users who have ever bought anything online (80% of all internet users) were asked if they had ever noticed customer ratings or feedback scores on websites such as Amazon and eBay. Those who had noticed this information from other users were asked how useful they found this information in helping them to decide whether to make a purchase.

Figure 61 shows responses from those who use the internet and have ever bought anything online.

Figure 61: Awareness and use of customer ratings or feedback scores on websites such as Amazon or eBay



IN43/44 Have you ever bought anything online?/ Have you ever noticed customer ratings or feedback scores on websites such as Amazon and eBay? How useful are these in helping you decide whether to make a purchase?
Base: Those who use the internet at home or elsewhere and have ever bought anything online (1335 aged 16+, 114 aged 16-19, 123 aged 20-24, 266 aged 25-34, 389 aged 35-44, 254 aged 45-54, 117 aged 55-64, 68 aged 65+) NB – LOW BASE SIZE FOR AGED 65+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

Among those who have noticed customer ratings or feedback scores on websites such as Amazon or eBay, almost all say they find them useful in helping to decide whether to make a purchase (90%). This equates to 88% of people who have bought something online.

Responses differ across the age groups, with those aged 16-19 less likely to have noticed the ratings or scores, and those aged 65 and over more likely to say they don't find the ratings or scores useful or have not noticed them. Internet users aged 25-34 are the most likely to say they do find the ratings or scores useful in helping to decide whether to make a purchase. Responses do not differ by gender or socio-economic group, but those with children in the household and those who are working are more likely to say they find the ratings or scores useful.

3.18 Awareness of, and attitudes towards, file-sharing services

People can download music and films in one of two ways. One way is to buy music or films from an online store like iTunes. The other way is to download the content from a file-sharing service (such as those available on Limewire or Kazaa) where an individual shares copies of the content for free.

It is illegal to share/download copies of rights-protected content without the permission of the rights holder.

All adults were prompted with a description of the two main ways in which music and films can be downloaded from the internet:

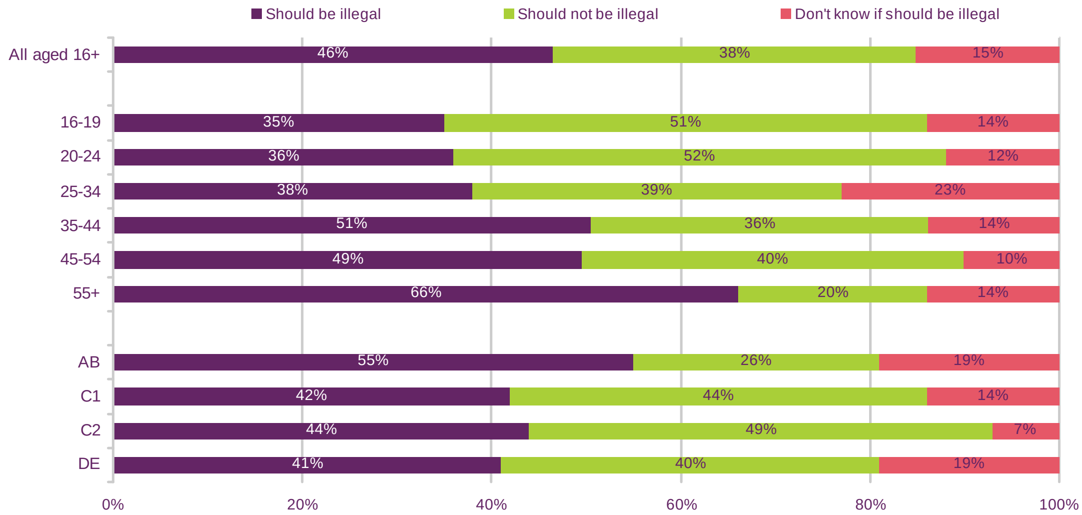
- *paying at an online shop like iTunes; or*
- *downloading from a site like Limewire or Kazaa where a person shares their copy of the music or the film for free.*

Across all adults, half (52%) are aware of online shops like iTunes, and two in five (42%) are aware of free download sharing services. Close to half (44%) are not aware of either type of service. Awareness is lower among older adults, aged 55 and over, with one in five (23%) being aware of online shops or download sharing services (20%).

Of those who are aware of free download sharing services, one in six adults (16%) told us that they are not aware that downloading for free from these sites is often illegal because of copyright issues. This level of awareness does not vary by age.

Those who are aware that downloading shared copies of music or movies is often illegal (35% of all adults) were asked whether they felt this should be illegal. Figure 62 shows responses to this question from each age group.

Figure 62: Attitudes about downloading from sharing services, by age



IN47 –Do you think that downloading films, music and software in this way should be illegal?
Base: All aged 16+ who are aware that downloading from file sharing sites is often illegal (993 aged 16+, 133 aged 16-19, 103 aged 20-24, 202 aged 25-34, 264 aged 35-44, 159 aged 45-54, 129 aged 55+, 240 AB, 340 C1, 195 C2, 211 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

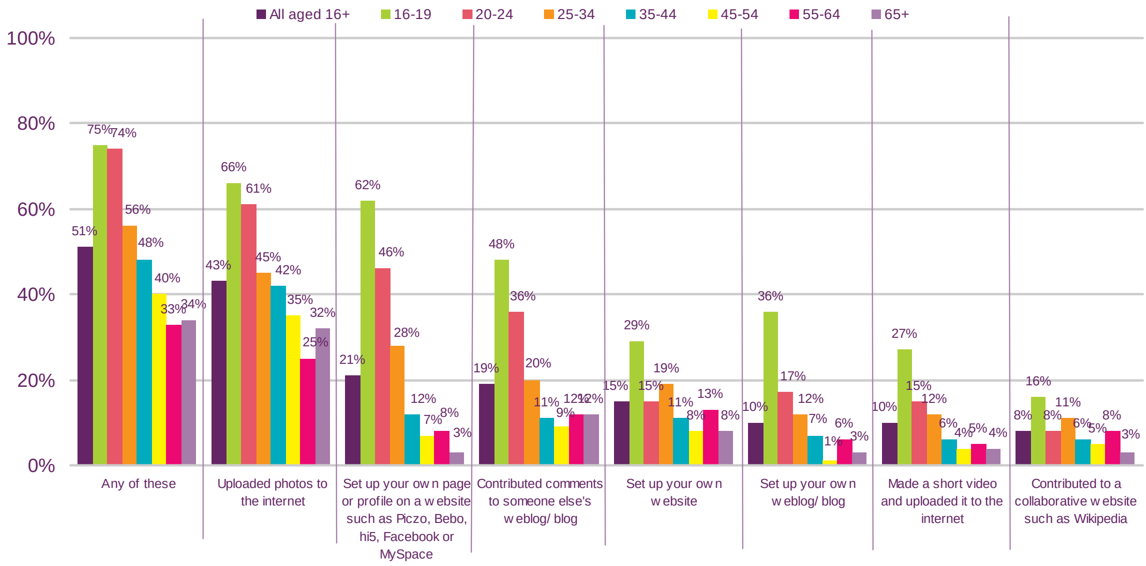
There is little consensus among adults aware of legal issues surrounding file-sharing services about whether downloading copy right material from shared services should be illegal or not. Over-55s, and those in AB households, are more likely to say it should be illegal. Under-25s and. those in C2 households are more likely to say it should not be illegal.

Among adults who download music or video content at least weekly, nine in ten (88%) say that downloading from sharing services should not be illegal.

3.19 Interest in, and experience of, creative activities

Adults who use the internet (63%) were prompted with seven types of creative media activities. For each activity they were asked if they had already done it, were interested, or were not interested in doing it. Figure 63 shows the proportion of all adult internet users, by age group, who have done each of the seven activities.

Figure 63: Internet users' experience of creative activities, by age

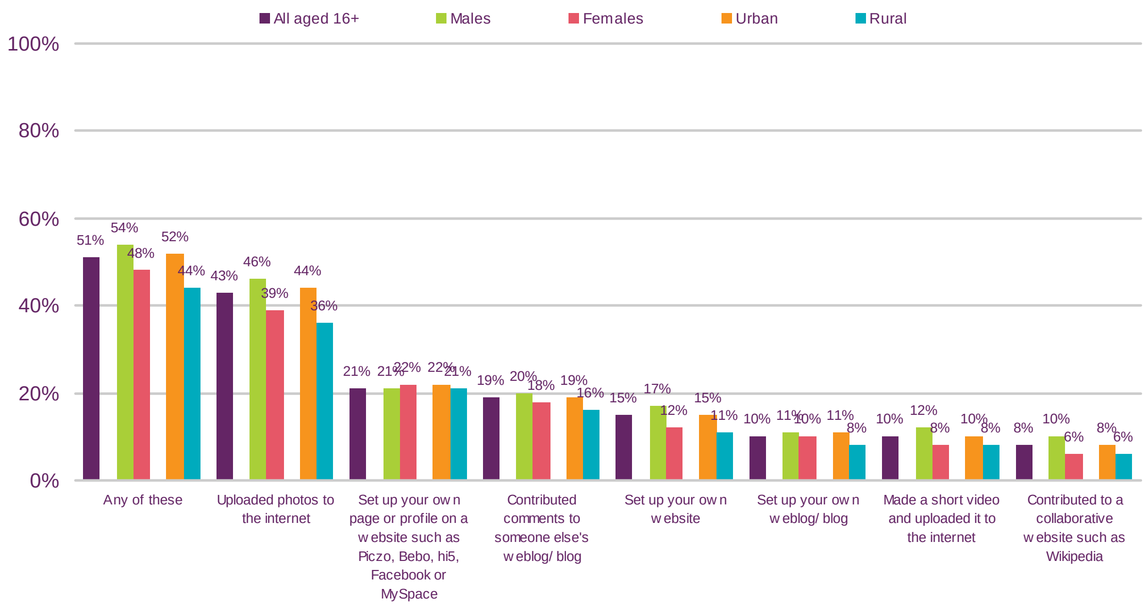


IN28A-G – I'd like to read out a number of things people might do using the types of technologies we've been talking about. For each one, could you please tell me if you've done it, or you'd be interested in doing it, or you're not interested in doing it?
Base: All who use the internet at home or elsewhere (1723 aged 16+, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While half of all internet users have some experience with these creative activities, no single activity has been experienced by a majority of internet users. Experience of each of the seven activities is more common among those aged 16-19, followed by 20-24 year olds and then 25-34 year olds. A minority of internet users aged 45 or over have experience of any of these activities.

Figure 64 compares experience of these creative activities across other demographic groups, where responses differ significantly.

Figure 64: Internet users' experience of creative activities, by key demographic groups



IN28A-G – I'd like to read out a number of things people might do using the types of technologies we've been talking about. For each one, could you please tell me if you've done it, or you'd be interested in doing it, or you're not interested in doing it?
Base: All who use the internet at home or elsewhere (1723 aged 16+, 838 males, 885 females, 1271 urban, 452 rural)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

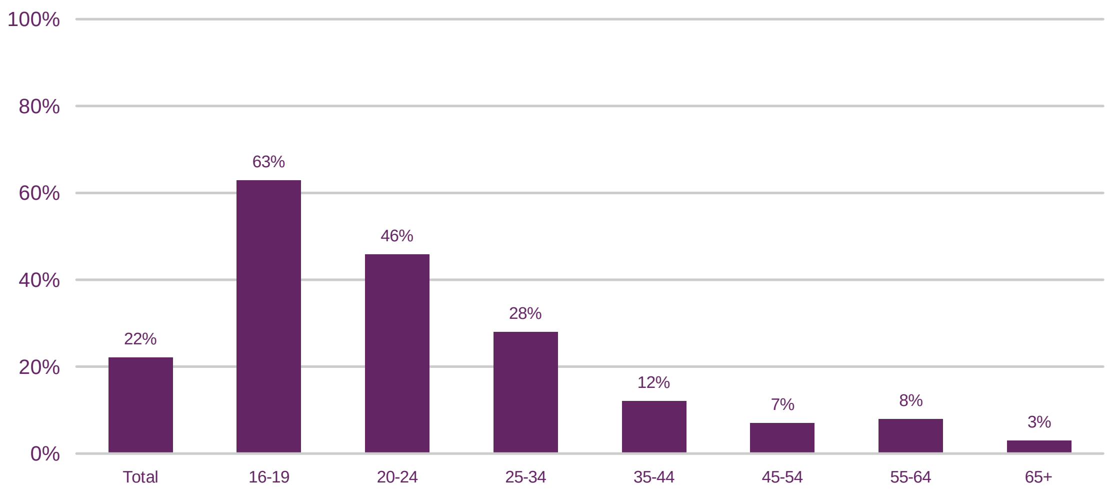
Males are more likely than females to have carried out any of the creative activities; driven by their greater experience of uploading photos or videos, setting up a website, or contributing to a collaborative website.

Those in urban areas are more likely than those in rural areas to have experience of any of the seven creative activities; driven by their greater experience of uploading photos or setting up a website.

3.20 Social networking sites

As shown in Figure 65, one in five (22%) adults who use the internet have set up their own page or profile on a social networking site like Piczo, Bebo, hi5, Facebook or MySpace. This is equivalent to 13% of all adults aged 16 and over. Those with experience of setting up a social networking site profile were asked which sites they have a page or profile on. Figure 66 shows the proportion of all internet users with one site profile, more than one site profile, or no social networking site profile.

Figure 65: Proportion of internet users who have a profile on a social networking site



IN28A – I'd like to read out a number of things people might do using the types of technologies we've been talking about. For each one, could you please tell me if you've done it, or you'd be interested in doing it, or you're not interested in doing it?
Base: All who use the internet at home or elsewhere (1723)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

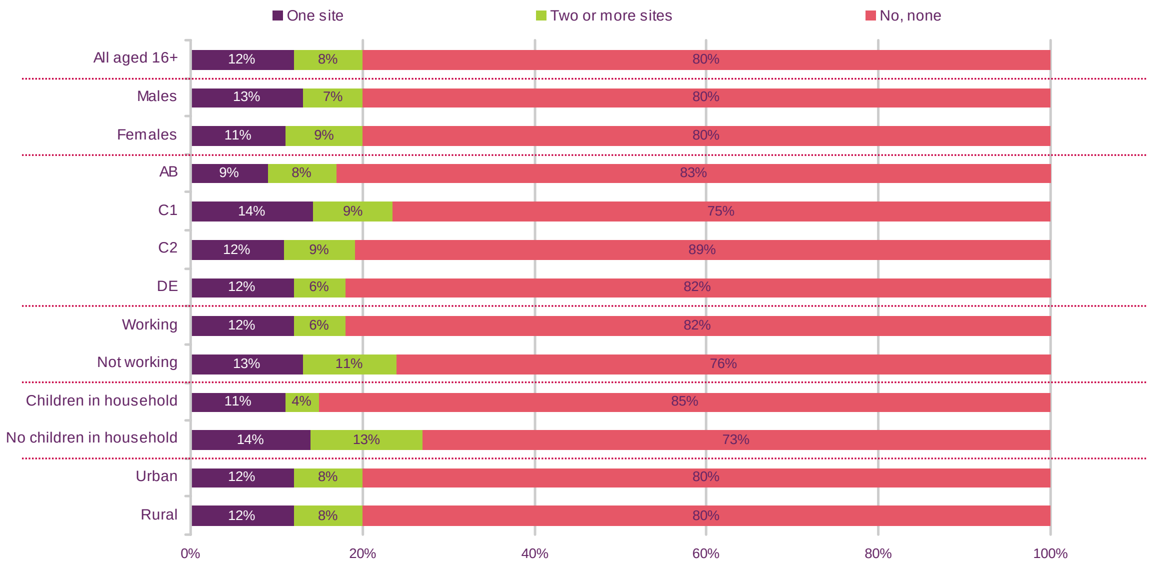
Figure 66: Number of social networking site pages or profiles among internet users, by age

IN28A/ IN29 – Have you set up your own page or profile on a website such as Piczo, Bebo, hi5, Facebook or MySpace?/ Which different sites like this do you have a page or profile on?
Base: All who use the internet at home or elsewhere (1723 aged 16+, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

In line with the age profile of social networkers, the youngest adults are more likely to have profiles on two or more sites than others. On average adult social networkers have profiles on 1.6 sites.

There are few differences across the key demographic groups in terms of the incidence of having a social networking site profile, as shown in Figure 67.

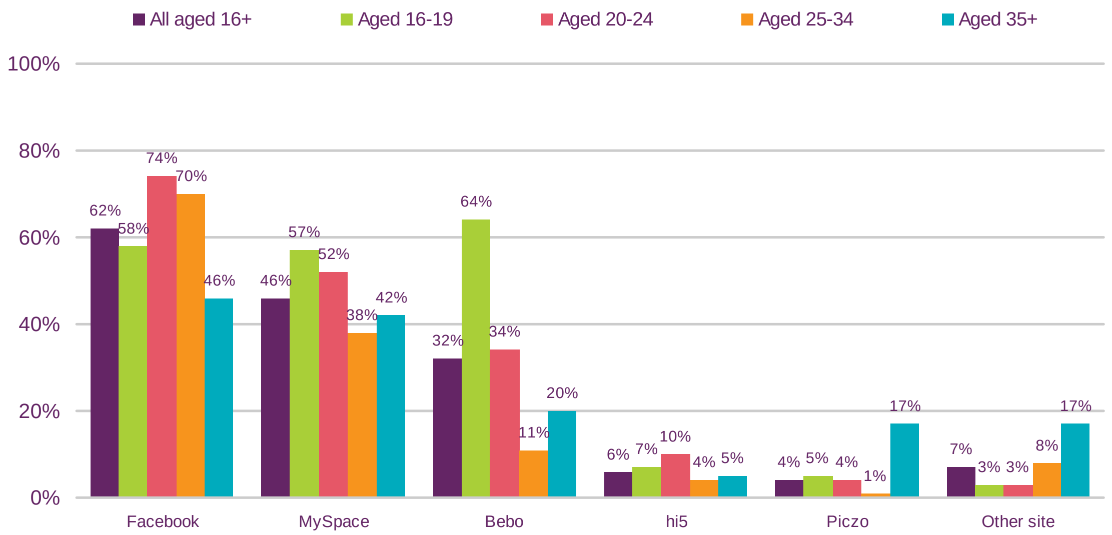
Figure 67: Number of social networking site pages or profiles among internet users, by key demographic group



IN28A/ IN29 – Have you set up your own page or profile on a website such as Piczo, Bebo, hi5, Facebook or MySpace?/ Which different sites like this do you have a page or profile on?
Base: All who use the internet at home or elsewhere (1723 aged 16+, 838 males, 885 females, 439 AB, 597 C1, 351 C2, 327 DE, 1059 working, 644 not working, 989 children in household, 666 no children in household, 1271 urban, 452 rural)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Figure 68 shows the social networking sites that people have profiles on.

Figure 68: Social networking sites users have a page or profile on, by age

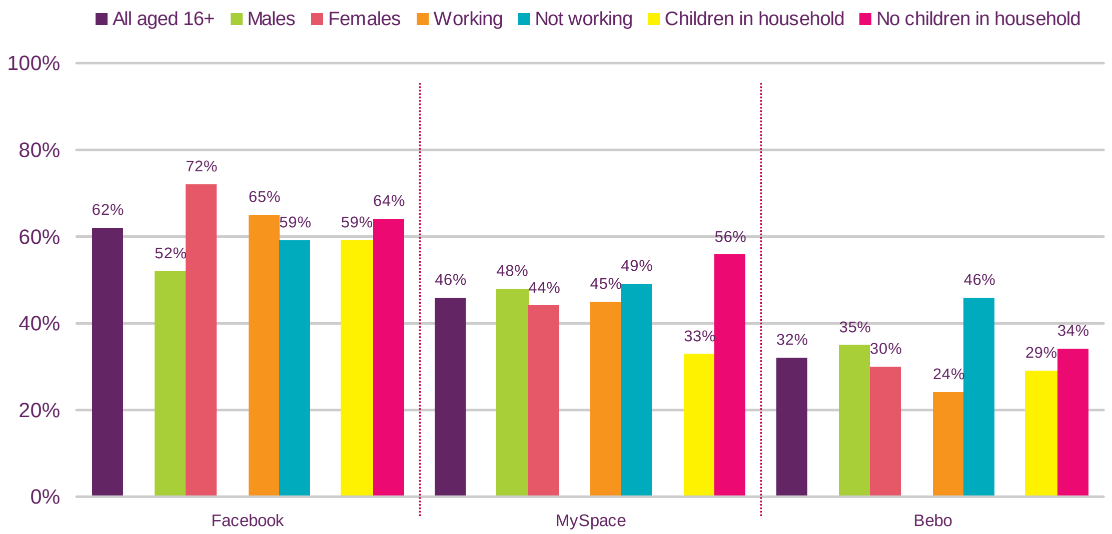


IN29– Which different sites do you have a page or profile on?
Base: Adults who have ever created their own page or profile on a social networking site (386 aged 16+, 117 aged 16-19, 74 aged 20-24, 93 aged 25-34, 101 aged 35+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Facebook is the most popular social networking site among adults with a page or profile, due to higher use among 20 to 34 year olds. The extent to which those aged 16-19 have profiles on multiple social networking sites is clear, given that they are as likely or more likely than all adults to have a profile on each of the sites. Bebo is the most used site by 16-19 year olds.

Figure 69 shows the social networking sites used by those with a profile in key demographic groups where responses differ significantly. Take-up is shown for the three most popular social networking sites; Facebook, MySpace and Bebo.

Figure 69: Social networking sites users have a page or profile on, by key demographic group



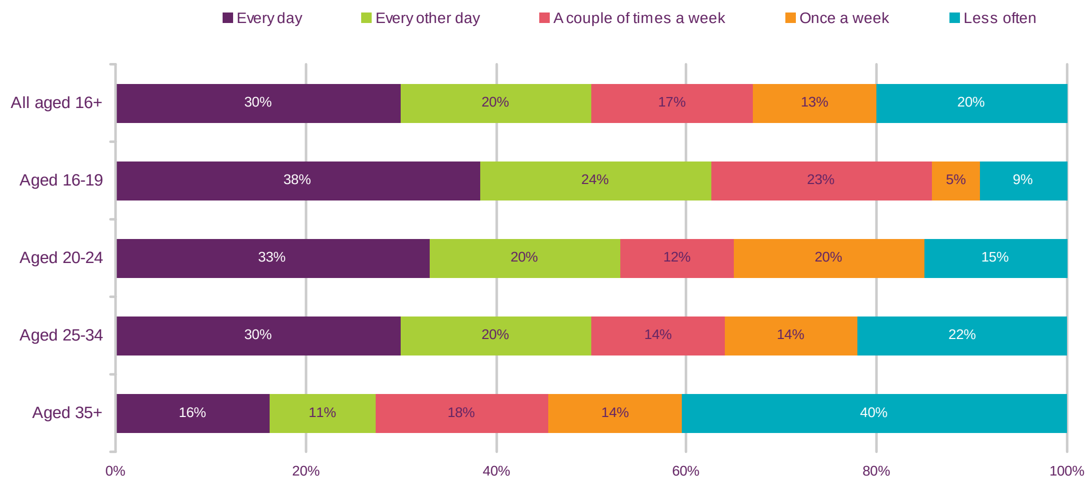
IN29– Which different sites do you have a page or profile on?
Base: Adults who have ever created their own page or profile on a social networking site (386 aged 16+, 188 males, 198 females, 207 working, 172 not working, 184 children in household, 181 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Females are more likely to have a profile on Facebook, but responses do not otherwise differ by gender. Those who are not working are more likely to have a profile on Bebo, suggesting that they are younger internet users. Those with no children in the household are more likely to have a profile on MySpace.

Those users who told us that their site profile could be seen by anyone (Figure 71) are more likely to have a profile on MySpace or Bebo.

Those with a current profile on a social networking site were asked how often they visit any of these types of sites, and their responses are summarised in Figure 70.

Figure 70: Frequency of users visiting social networking sites, by age



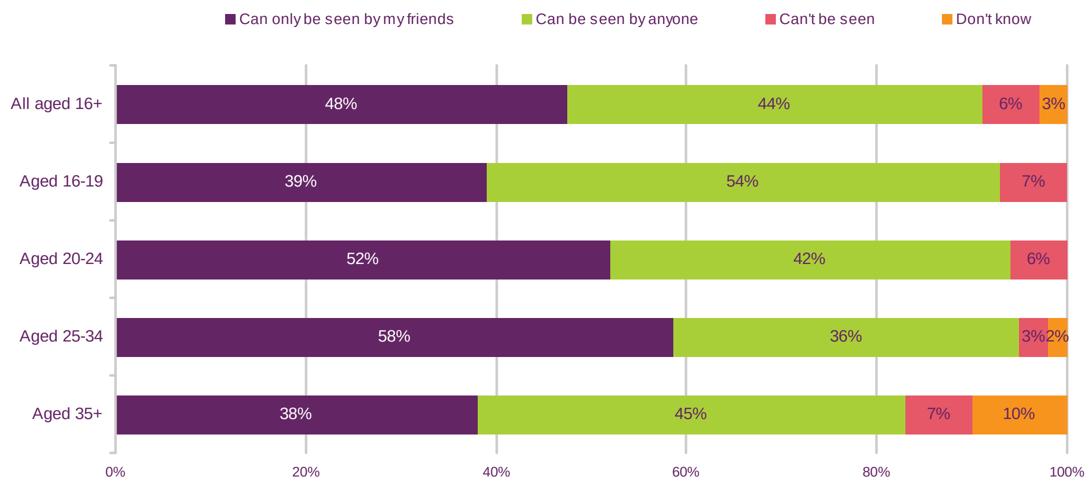
IN32– How often do you visit any sites like Piczo, Bebo, hi5, Facebook or MySpace?
Base: Adults with a current page or profile on a social networking site (347 aged 16+, 111 aged 16-19, 70 aged 20-24, 86 aged 25-34, 79 aged 35+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

As well as having more site profiles, those aged 16-19 are more frequent social networking site visitors; four in five visit more than once a week, compared to two in three of all adults with a profile. Considering the age profile, it is not surprising that those who are not working are also more frequent social networking site visitors. Responses do not otherwise vary between any other demographic groups.

Those users who told us that their site profile could only be seen by their friends (detailed later in this section) are more frequent social networking site visitors.

All adults with a social networking site profile were asked whether their profile can be seen by other people, and if so, who can see it. Figure 71 shows the responses given overall, and by age.

Figure 71: Visibility of social networking site profile, by age



IN31– And do you know if this profile can be seen by other people? Who can see it?
Base: Adults with a current page or profile on a social networking site (347 aged 16+, 111 aged 16-19, 70 aged 20-24, 86 aged 25-34, 79 aged 35+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

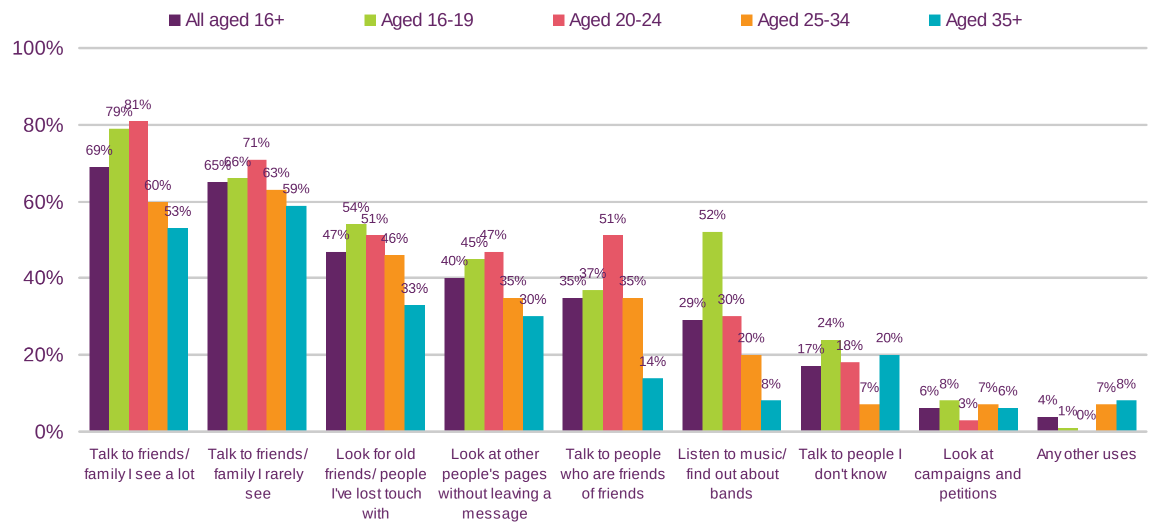
Half of all adults say their profile can be seen only by their friends, close to half say that their profile can be seen by anyone. Base sizes are small, but it appears that the youngest social networking site users, aged 16-19, are most likely to have the privacy settings left open.

Males are more likely than females to have a profile that is visible to anyone, but responses do not otherwise differ by demographic group.

As mentioned previously, those whose profile can be seen only by their friends are more frequent social networking site visitors.

Those with a social networking site profile were prompted with a list of uses and were asked which services they regularly use these sites for. Figure 72 shows responses overall, and by age.

Figure 72: Types of uses of social networking sites, by age



IN33– Do you regularly use these sites for any of the things shown on this card?
Base: Adults with a current page or profile on a social networking site (347 aged 16+, 111 aged 16-19, 70 aged 20-24, 86 aged 25-34, 79 aged 35+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The two most popular uses for social networking sites are *to talk to friends and family they see a lot* and *to talk to friends and family they rarely see*. Broadly speaking, younger users are more likely to talk with those they see a lot, and older users are more likely to talk with those they rarely see.

A minority of users (35%) *talk to friends of friends*, but this is more common among those aged 20-24 (51%). Similarly, a minority of users (29%) visit social networking site to *listen to music/ find out about bands*, and this is more common among those aged 16-19 (52%). Responses differ to some extent by gender, with males more likely to *listen to music/ find out about bands* and females more likely to *look for old friends/ people they have lost touch with*.

Those whose profile can be seen by anyone are more likely to use the sites they visit to *listen to music/ find out about bands* and also to *talk to people they don't know*. Seventeen percent of social networkers have talked to people they do not know and this rises to 24% among 16-19s.

Section 4

Mobile

This section looks at mobile phones in detail, covering issues such as take-up of mobile phones, reasons for using a mobile phone, owners' interest in and confidence with mobile phone functions, attitudes towards mobile phone content, understanding of regulation, awareness of content security, and concerns about mobile phones.

4.1 Summary

Take-up of mobile phones has increased since 2005 (from 82% to 85%), particularly among those aged 55-64, and over-75s, where penetration has traditionally been lower. Claimed ownership of a 3G mobile phone has increased from 9% in 2005 to 20% in 2007.

Interest in the functions available on a mobile phone is lower among owners aged 55 and over, those who are not working and those with no children in the household. Those who are interested are mostly confident with the functions.

Mobile phone users are more likely to feel that *users should be protected from receiving inappropriate or offensive content* than to feel that *content on mobile phones should be free to be expressive and creative*. Among older users (aged 65 and over), protection outweighs freedom of expression to a greater extent.

There is little consensus among adults as to whether mobile phone content is regulated, with one fifth saying it is regulated, one third saying it is not, and the remaining half unsure. One in five mobile phone users are aware either of age verification systems or of website filters, with no change in awareness since 2005.

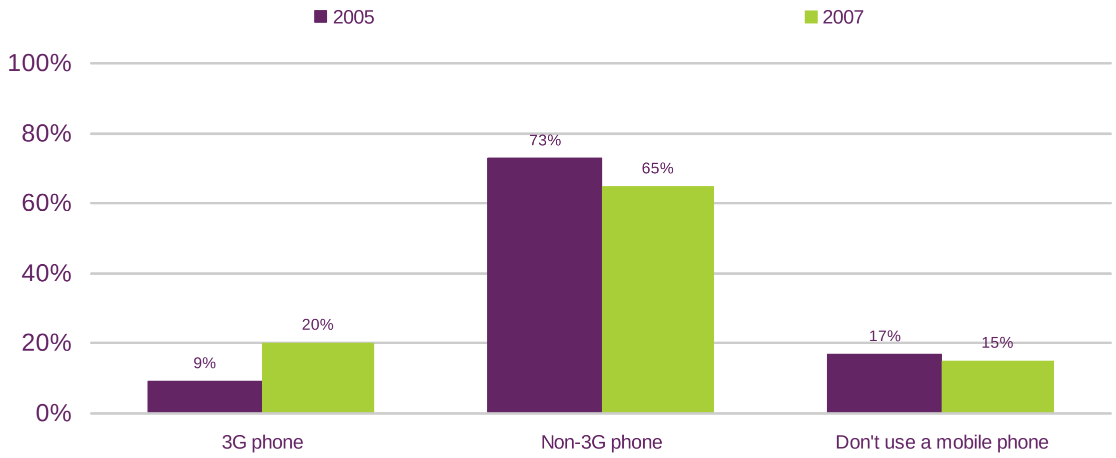
While one in three adults are concerned about mobile phones, this is lower for the youngest adults (aged under 25). Concerns are equally likely to relate to *a risk to society and values*, *affordability* or a *risk to health*. Those in AB households are more likely to have concerns. The level of concern about mobile phones has not changed since 2005.

4.2 Take-up of mobile phone services

Figure 73 shows the take-up of mobile phones among UK adults aged 16 and over. Those with a mobile phone were asked whether their phone was a 3G[4] phone; overall levels of take-up are split between 3G and non-3G mobile phones. Findings from the 2005 and 2007 Media Literacy Audit surveys are shown together, for comparison.

[4] Described as 'a third generation mobile phone which allows you to send and receive data at high speeds, allowing you to carry out activities such as sending and receiving video clips and making video calls'.

Figure 73: Take-up of mobile phones, 2005 and 2007



M1/ M2 – Do you personally use a mobile phone?/ Is yours a 3G phone – a third generation mobile phone which allows you to send and receive data at high speeds, allowing you to carry out activities such as sending and receiving video clips and making video calls?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

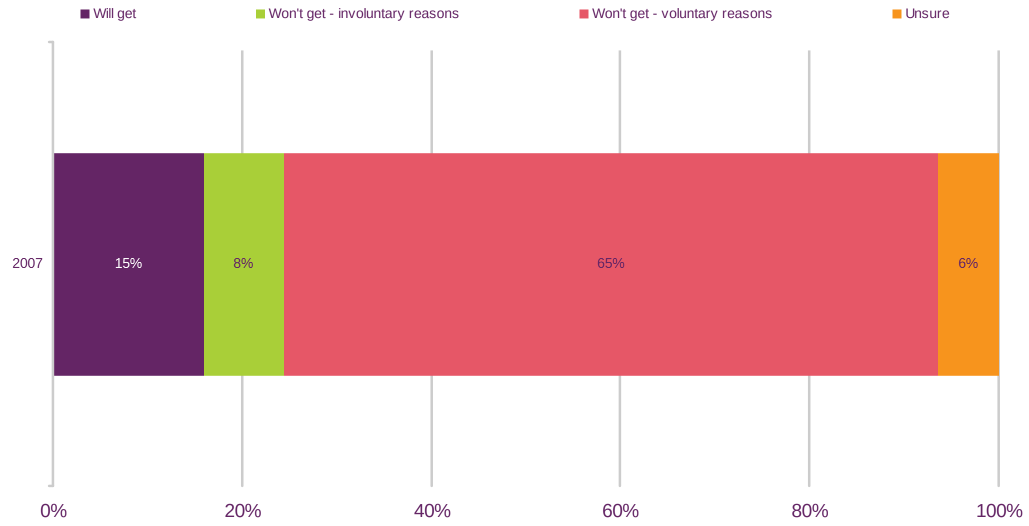
Take-up of mobile phones among UK adults has increased by 3 percentage points since 2005, with take-up of 3G phones increasing by 11 percentage points since 2005. A far higher proportion of adults, therefore, have shifted from non-3G to 3G than have started to use a mobile phone since 2005. It is important to note that other research studies have shown that people are not necessarily aware of the term 3G, and even though we described 3G functions to them, this may still have resulted in mis-reporting of 3G take-up.

Ownership of a mobile phone among adults in each age group and in key demographic groups is shown in Figure 3 and Table 2.

4.3 Non-ownership of mobile phone services

Two-thirds of people who do not have a mobile phone give a voluntary reason for not intending to get one (Figure 74). Combined with the relatively high penetration of mobile phones this suggests that the market is near saturation.

Figure 74: Non-ownership of mobile phone

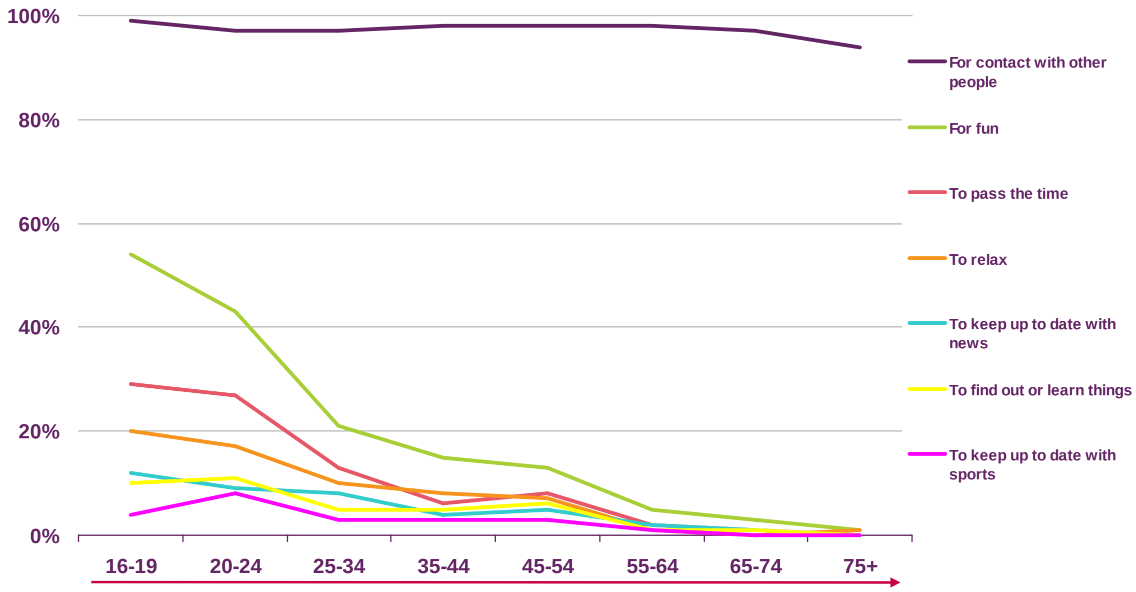


Various – Can you tell me if you intend to get digital television/internet access/mobile phone at home in the next year or so?/ And can you tell me why that is?
Base: All adults aged 16+ who do not have mobile phone at home (n=517)
Source: Ofcom communications tracking survey Q3 and Q4 2007

4.4 Reasons for using a mobile phone

All adults with a mobile phone (85%) were prompted with a list of seven possible reasons for using a mobile phone and were asked to say which, if any, were applicable to them. Figure 75 shows the reasons given by mobile phone users in each age group.

Figure 75: Reasons for using a mobile phone, by age



M10 – Which, if any, of these are reasons why you use a mobile phone?
Base: Adults aged 16+ who use a mobile phone (2481 aged 16+, 202 aged 16-19, 199 aged 20-24, 452 aged 25-34, 628 aged 35-44, 442 aged 45-54, 278 aged 55-64, 205 aged 65-74, 70 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Virtually all those with a mobile phone say that *contact with other people* is the main reason, for using their phone.

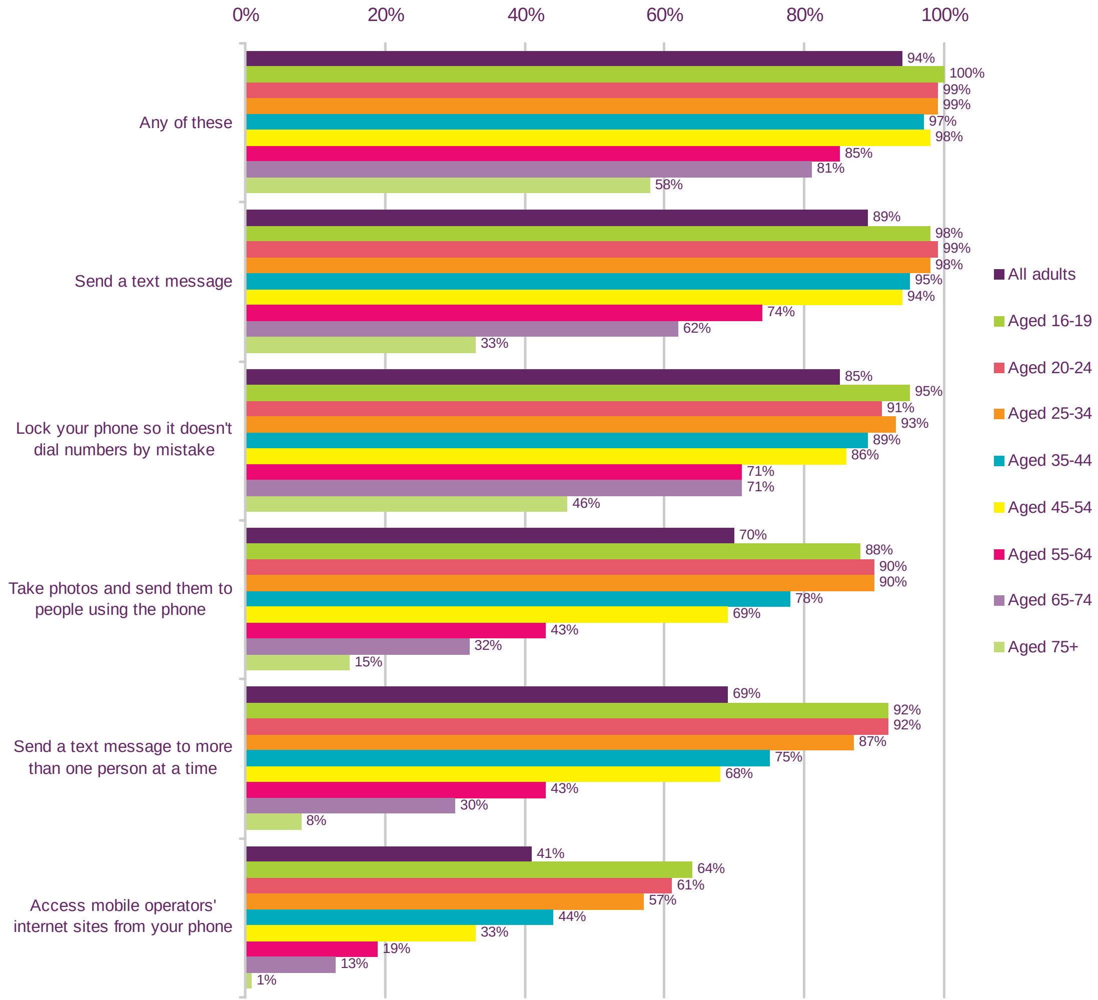
Mobile phone users aged under 25 mention more reasons for using a mobile phone than others. However, even among these younger users, the reasons (other *than for contact with other people)* are mentioned by half, or less, of all mobile phone users.

Reasons for using a mobile phone do not vary by gender or by the presence of children in the household. There are few differences in the reasons for using a mobile phone across other key demographic groups. Those in C1 socio-economic group households are more likely than adults as a whole to use the phone *to relax* (11% compared to 8% overall). Those in urban areas are more likely than those in rural areas to use the phone *to keep up to date with news* (6% compared to 3%).

4.5 Interest in mobile phone functions

To assess the level of interest in interactive functions, we asked people how interested they were in five interactive functions on mobiles. Figure 76 shows the responses from all those with a mobile phone, by age group. The functions are shown ranked in order of interest.

Figure 76: Interest in mobile phone functions among owners, by age



M4 – I'm going to read out some different types of things that you can do with some kinds of mobile phones, and for each one I'd like you to say which of the options on the card applies to you
Base: All adults aged 16+ with a mobile phone (2481 aged 16+, 202 aged 16-19, 199 aged 20-24, 452 aged 25-34, 628 aged 35-44, 442 aged 45-54, 278 aged 55-64, 205 aged 65-74, 70 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

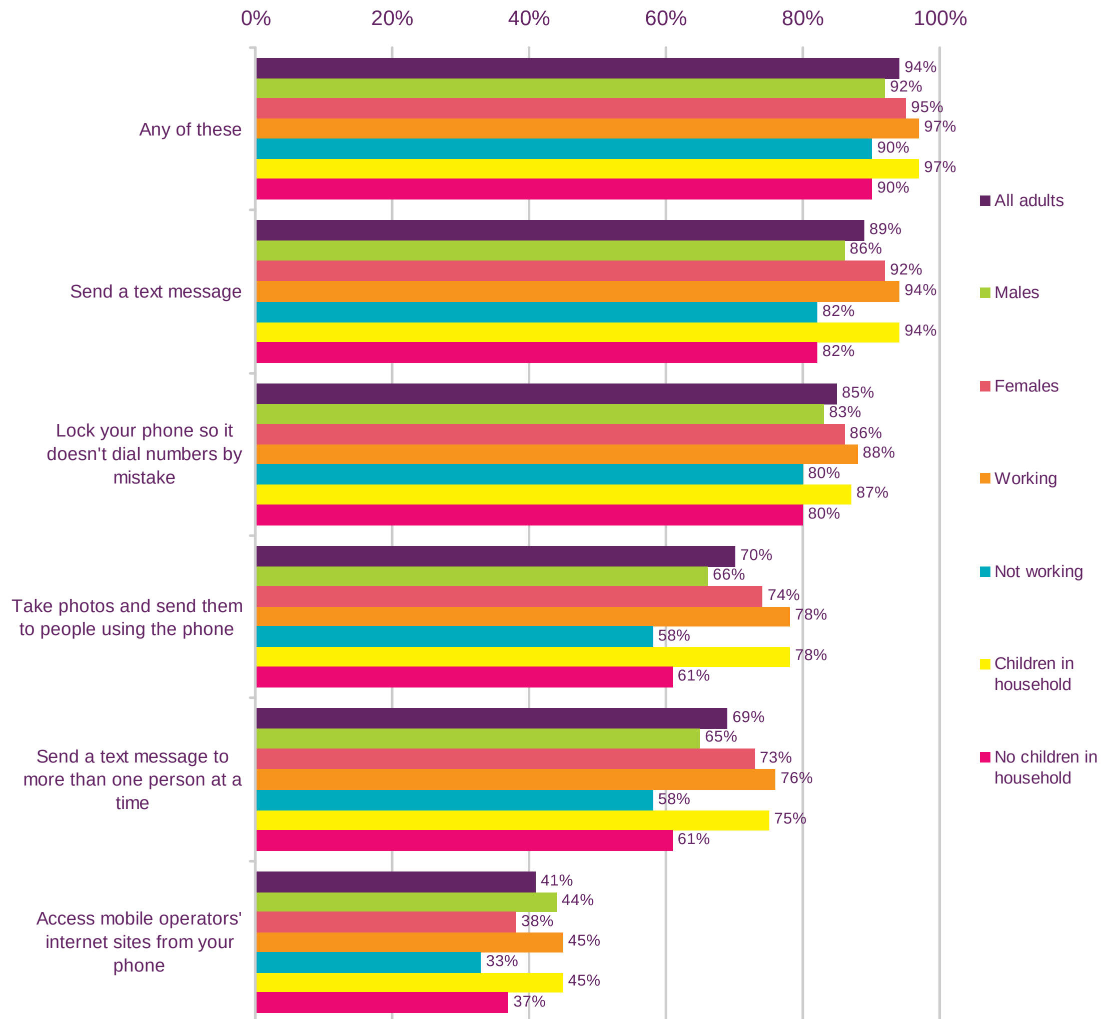
Four of the five functions that we assessed are of interest to the majority of mobile phone owners, with the result that almost all (94%) owners are interested in any of these functions.

Interest in each of the functions is lower among owners aged 55 and older, with markedly lower interest among owners aged 75 and over.

Interest in accessing mobile operators' internet sites from their mobile phone differs most by age, with over half of those aged under 35 interested in this function compared to under half of those aged 35 and over.

Figure 77 shows the level of interest in these mobile phone functions, among the other key demographic groups where findings differ significantly.

Figure 77: Interest in mobile phone functions, by key demographic group



M4 – I'm going to read out some different types of things that you can do with some kinds of mobile phones, and for each one I'd like you to say which of the options on the card applies to you
Base: All adults aged 16+ with a mobile phone (2481 aged 16+, 1155 males, 1326 females, 1354 working, 1096 not working, 1372 children in household, 1007 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

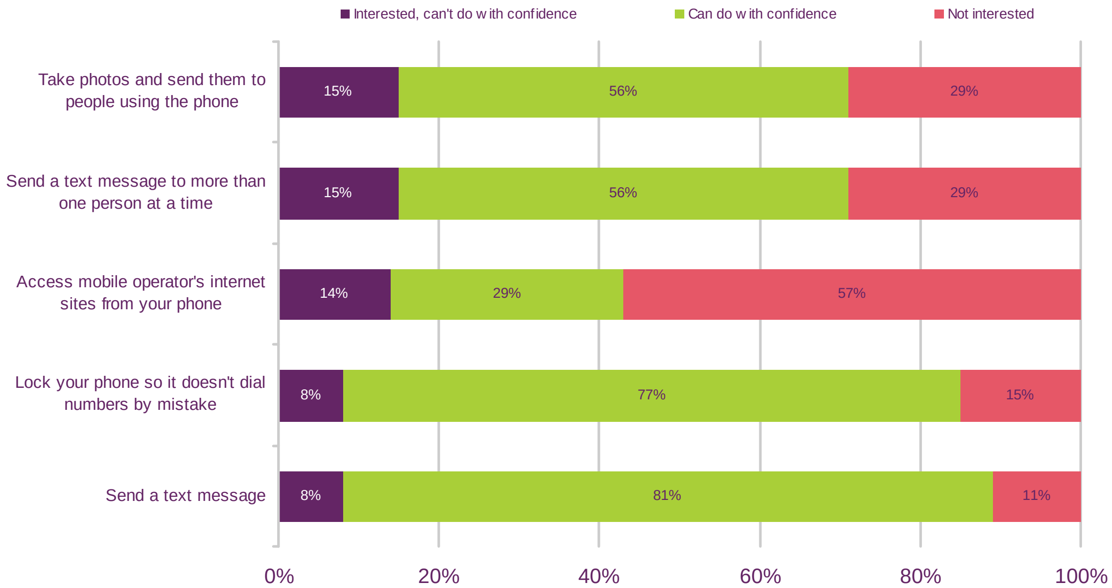
While males are more likely to be interested in accessing mobile operators' internet sites from their mobile phone, females are more likely to be interested in sending text messages, taking photos and sending a text message to more than one person at a time.

Clear differences emerge in terms of levels of interest by working status and by presence of children in the household. Given that close to nine in ten of all UK adults have a mobile phone, it is very likely that these differences are related to the age of the mobile phone owner. There are lower levels of interest in each of the five functions among those who are not working and those with no children in the household, and both of these groups are strongly skewed towards older people.

4.6 Confidence with mobile phone functions

Those mobile phone owners who said they were interested in particular functions were then asked to say whether they could use these functions with confidence. Figure 78 splits all mobile phone owners into one of three groups for each of the five functions; those who are not interested, those who are interested and can do it with confidence, and those who are interested but cannot do it with confidence.

Figure 78: Confidence with mobile phone functions among owners



M4A-E – Please look at the options shown on this card. I'm going to read out some different types of things that you can do with some kinds of mobile phone, and for each one I'd like you to say which of the options on the card applies to you.
Base: Adults aged 16+ with a mobile phone (2481)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The confidence gap on the left side of the figure is at similar levels for the first three mobile phone functions in Figure 78, with around one in seven mobile phone owners *interested* but not able to do the task with confidence. As a proportion of those interested in the function, the largest confidence gap is for *accessing mobile operators' internet sites from the mobile phone*, at around one-third of those interested in this function.

The confidence gap is more apparent where interest is higher. A higher proportion of mobile phone owners aged 55-64, and females, say they are interested in the functions but unable to do them with confidence.

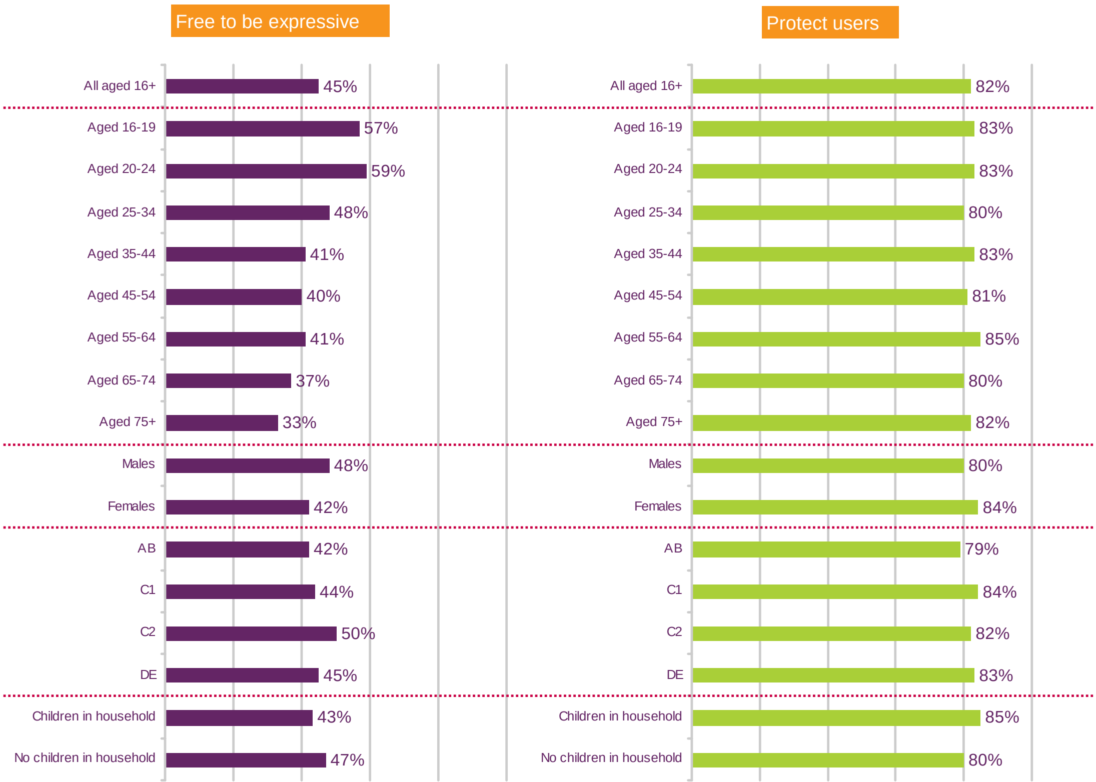
4.7 Attitudes towards mobile phone content

Figure 79 shows the proportion of mobile phone owners who agree that:

- *content on mobile phones must be free to be expressive and creative; and*
- *mobile phone users must be protected from receiving inappropriate or offensive content.*

For each statement Figure 79 shows the proportion agreeing either strongly or slightly.

Figure 79: Attitudes towards mobile phone content – *free to be expressive and protected from content*



M9A-B – Content on mobile phones must be free to be expressive and creative/ Mobile phone users must be protected from receiving inappropriate or offensive content
Base: All adults aged 16+ with a mobile phone (2481 aged 16+, 186 aged 16-19, 150 aged 20-24, 332 aged 25-34, 473 aged 35-44, 319 aged 45-54, 156 aged 55-64, 103 aged 65+ , 838 males, 885 females, 439 AB, 597 C1, 351 C2, 327 DE, 989 children in household, 666 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Among all adults with a mobile phone, less than half agree that *mobile content must be free to be expressive and creative* and four in five agree that *users should be protected from receiving inappropriate or offensive content*. Mobile phone users are less likely to feel that content should have freedom of expression, and more likely to say users need protection from offensive content.

Compared to the 2005 Media Literacy Audit, there has been a decrease in levels of agreement that *mobile content must be free to be expressive and creative* and a shift towards more neutral attitudes.

As shown in Figure 79, higher levels of agreement that *mobile phone content must be free to be expressive and creative* are evident among owners aged under 25, C2s, males, and those with no children in the household.

One in three give neutral (neither agree nor disagree) response and one in ten disagree with this statement. Compared to all mobile phone users, those aged 65 and over are more likely to say they don't know. Comparatively high levels of neutral responses may reflect lower content use of content functions on mobiles compared with viewing content online in general or on television.

Certain groups of adults are more likely to agree that *mobile phone users must be protected from receiving inappropriate or offensive content*. Although this view does not vary across the age groups, agreement is more common among females and among those with children in the household.

Two in five (40%) mobile phone owners agree with both of these statements about mobile phone content, with a higher degree of overlap among those aged under 25 (51%) and those in C2 socio-economic group households (46%).

4.8 Mobile phone content regulation

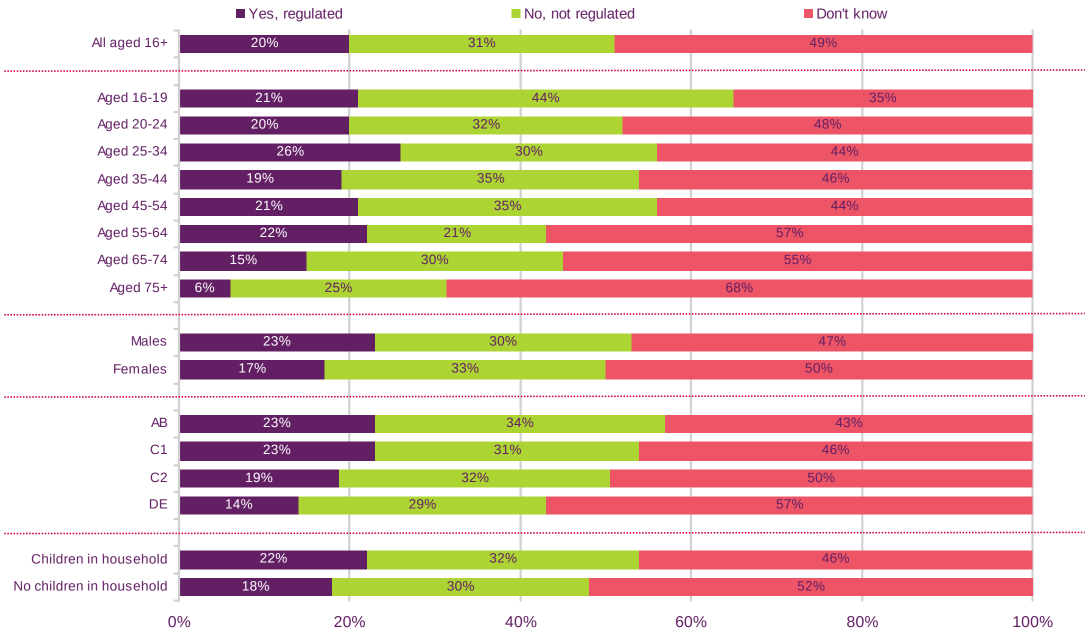
All UK mobile phone operators comply with a voluntary code, under which they commit to controlling under-18s' access to adult content. This is achieved through the application of an internet filter by the mobile operator.

- Mobile operators have an age check system under which new subscribers must show that they are 18 or over when purchasing a handset or contract to have the filter removed.

- In addition, a subscriber can request that the block be applied to an existing mobile number.

All adults were asked whether mobile phone content (e.g. *internet surfing and downloading videos from websites on your mobile*) is regulated, with a description[5] of a regulator provided where necessary. Figure 80 shows responses by age groups and the key demographic groups showing differences in responses to this question.

Figure 80: Is mobile phone content regulated?



M7 – As far as you know, is mobile phone content (e.g. internet surfing and downloading videos from websites on your mobile) regulated at all?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE, 1481 children in household, 1306 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

There is little consensus across UK adults or mobile phone users specifically on whether mobile phone content is regulated, with a higher proportion of adults unsure than having an opinion on whether it is regulated or not. Adults aged 55, those in DE socio-economic group households, and those with no children in the household, are more likely to be unsure as to whether mobile phone content is regulated or not.

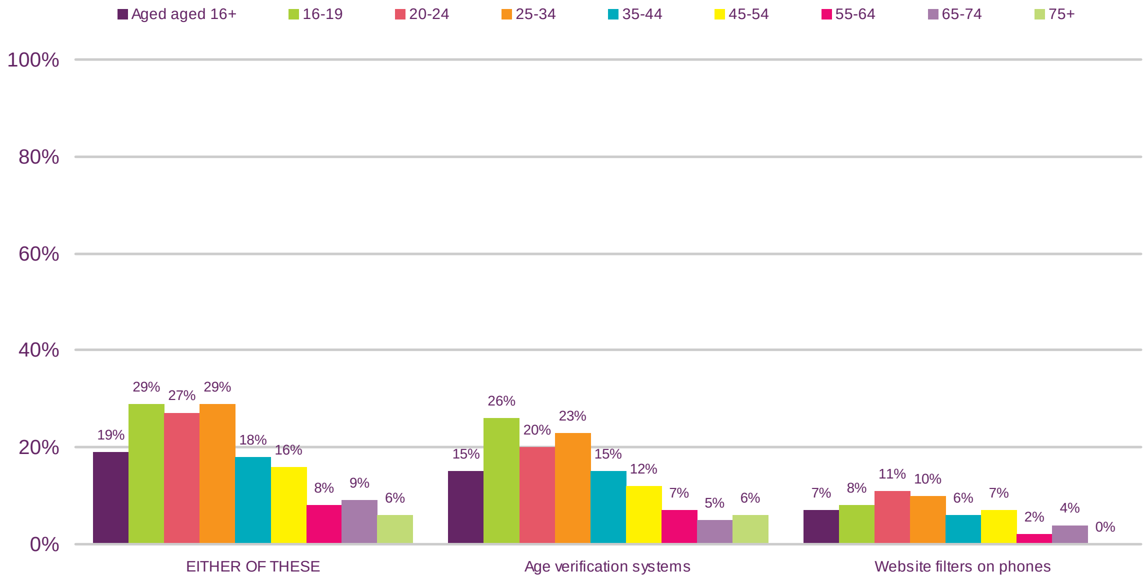
[5] A regulator is often called a 'watchdog' – it sets rules/ guidelines about content. People can also complain to the regulator if they feel a website has included something that they thought was inappropriate e.g. because it was offensive, harmful, inaccurate or unfair

Adults aged 25-34, those in ABC1 socio-economic group households, males and those with children in the household are the most likely to believe that mobile phone content is regulated.

Due to changes in the survey it is not possible to compare these results with the 2005 Media Literacy Audit.

Those with a mobile phone were asked if they were aware that mobile phone networks have introduced age verification systems (with a description[6] provided where necessary). They were also asked if they were aware that operators can apply filters to mobile phones to prevent access to inappropriate websites using the phone. Responses for both types of mobile phone content security are shown in Figure 81.

Figure 81: Awareness of mobile phone age verification systems and filters



M3 – Were you aware that the mobile phone networks have introduced age verification systems? (DESCRIPTION PROVIDED)/ Were you aware you can apply filters to mobile phones to prevent access to inappropriate websites using the phone?
Base: All adults aged 16+ with a mobile phone (2481 aged 16+, 202 aged 16-19, 199 aged 20-24, 452 aged 25-34, 628 aged 35-44, 442 aged 45-54, 278 aged 55-64, 205 aged 65-74, 70 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

One in five mobile phone users are aware of either of these types of mobile phone content security, with higher awareness of age verification systems than of website filters on mobile phones. Awareness is higher among users aged under 35, and is also higher among males than females (21% compared to 17% aware of either).

Awareness of either type of mobile phone content security has not changed since the 2005 Media Literacy Audit.

4.9 Concern about mobile phones

Adults were asked to mention, without any prompting, any concerns they have about mobile phones and were then asked to respond, using a scale, to say how concerned they are about mobile phones in general.

The unprompted responses have been grouped into five themes:

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[6] The latest mobile phones can access video clips, and any commercial content unsuitable for customers aged under 18 will be classified as "18". This type of content will not be available to customers unless the mobile phone network has verified they are aged at least 18.

- risk to society/ values - relating to responses such as misuse of camera phones, “happy slapping”, children having phones at a young age and paedophiles contacting children;

- affordability - relating to responses such as cost of calls generally and cost of calls when abroad;

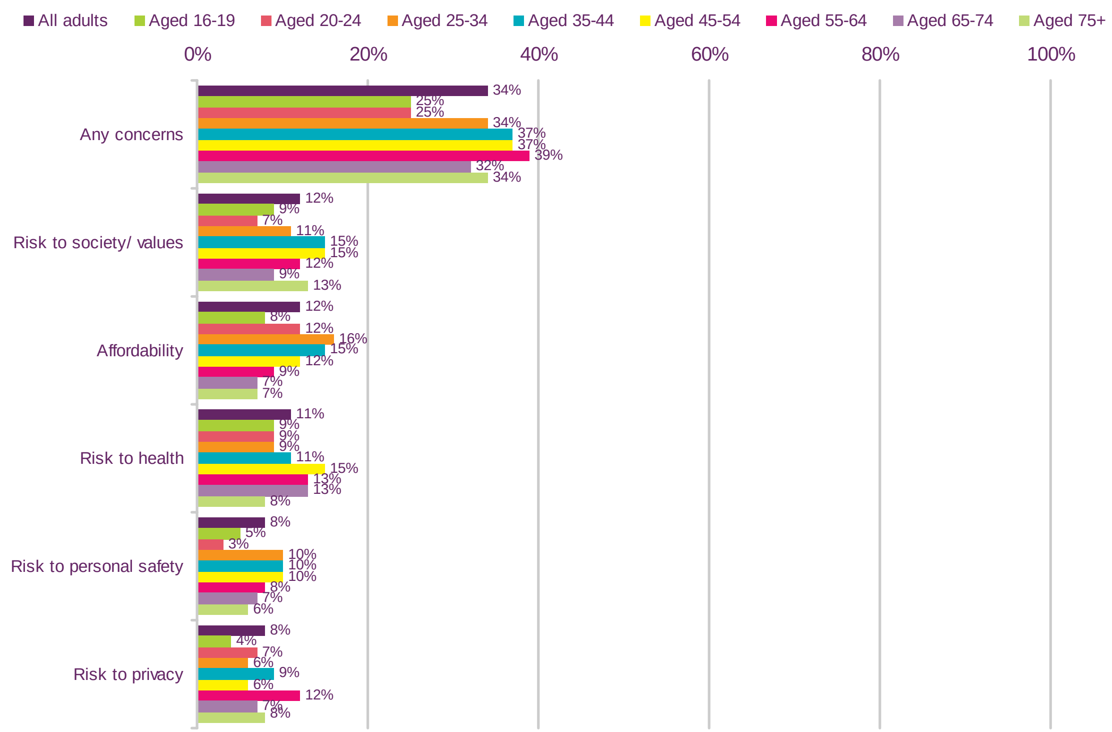
- risk to health - relating to responses such as health concerns using handset and health concerns - masts;

- risk to personal safety - relating to responses such as target for stealing mobile phone; and

- risk to privacy - relating to responses such as intrusion into other people’s space/ public space and junk/ spam text messages.

Figure 82 shows responses from all adults regarding any concerns they have about mobile phones, and from those in each of the age groups.

Figure 82: Concerns about mobile phones, by age

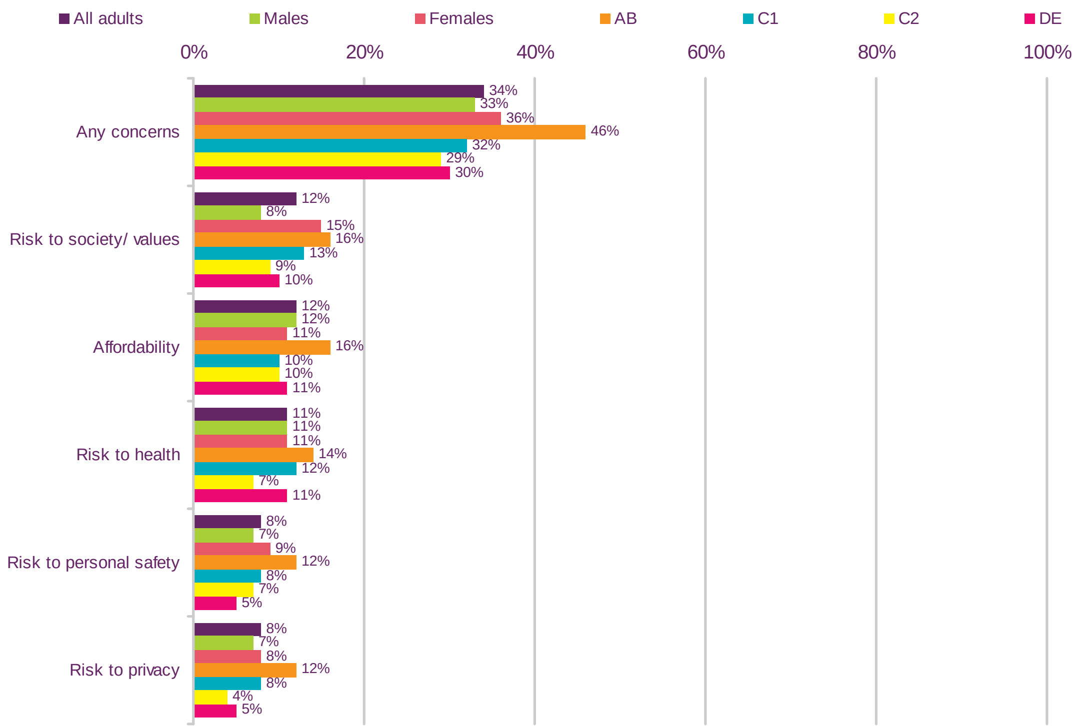


M5 – Can you tell me if you have any concerns about mobile phones?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While one-third of all adults mention any concerns about mobile phones, mentions are lower for the youngest (aged under 25) adults. One quarter of adults aged under 25 mention any concerns, compared to two in five of those aged between 35 and 64, and one-third of those aged 65 and over.

Figure 83 compares responses from the key demographic groups showing differences in responses to this question.

Figure 83: Concerns about mobile phones, by key demographic group



M5 – Can you tell me if you have any concerns about mobile phones?
Base: All adults aged 16+ (2905 aged 16+, 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE))
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

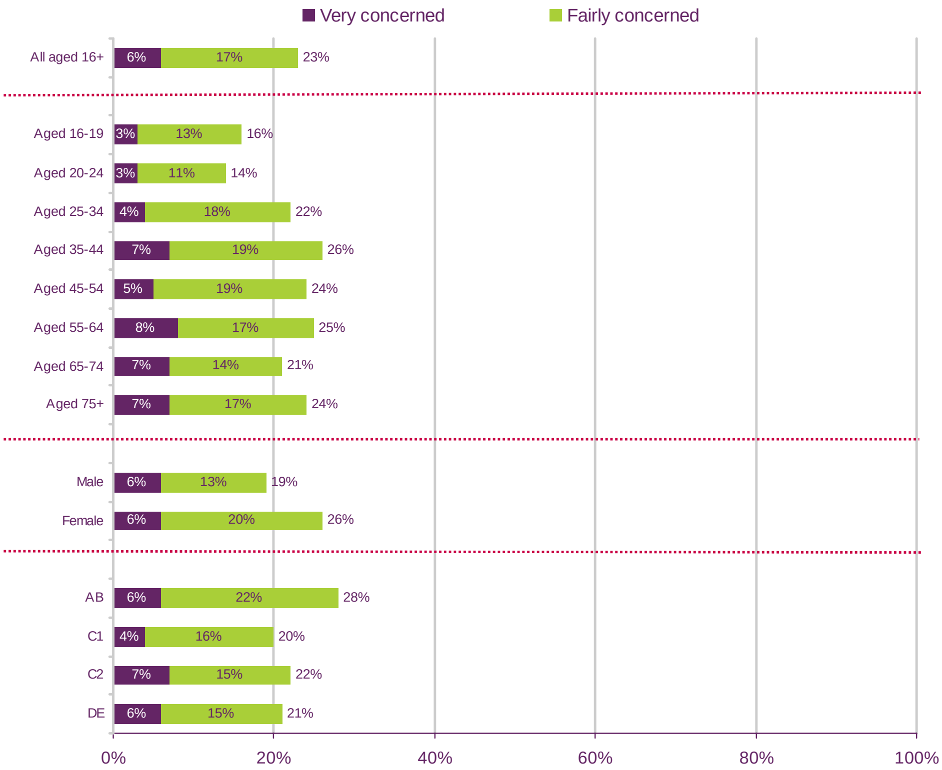
Across the socio-economic groups, adults in the AB socio-economic group are more likely to mention any concerns about mobile phones than adults as a whole. Adults in the C2 socio-economic group are more likely to have no concerns than adults as a whole.

Females are more likely to have concerns relating to mobile phones *as a risk to society and values*, while males are more likely to have no concerns about mobile phones.

Among the 6% of adults (shown in Figure 84) that are very concerned about mobile phones, the highest proportion of these concerns relate to *risk to society/ values* and affordability.

Figure 84 shows the proportion of all adults who are either very, or fairly, concerned about mobile phones. Responses are shown for each of the age groups and the key demographic groups showing differences in responses to this question.

Figure 84: Degree of concern about mobile phones



M6 – Overall, how concerned are you about mobile phones?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 Males, 1535 Females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

One in five of all UK adults (22%) are concerned about mobile phones, with three in four of these being fairly concerned, as opposed to very concerned.

Compared with adults in general, concern is lower among under-25s. Adults in AB socio-economic group households are more concerned about mobile phones than adults as a whole, and females are more concerned than males.

The extent of concern about what is on mobile phones has not changed since the 2005 Media Literacy Audit, but a higher proportion of adults are not concerned than was previously the case (67% in 2007 compared to 63% in 2005).

While one-third (34%) of UK adults mention any specific concerns about mobile phones, only one in five UK adults (22%) are concerned about mobile phones generally. This suggests that some of the specific issues that people mention do not actually cause them a great deal of concern. The issues that cause the most concern tend to be those which we have categorised as risks to society or values, rather than affordability.

Section 5

Gaming

This section looks at gaming in detail covering issues such as the incidence of gaming, estimated weekly hours spent gaming, regulation, attitudes towards gaming, and concerns about gaming.

5.1 Summary

One in three adults ever play games on a games player or a computer, decreasing from three in four aged 16-19 to less than one in ten, aged 55 and over. Gaming is more common among males and those with children in the household.

Younger gamers, males, those in DE households and those with no children in the household have a higher than average estimated weekly volume of gaming, with the overall average standing at 4.7 hours per week.

There is little consensus among adults as to whether gaming is regulated, with 30% saying it is regulated, 20% saying it is not, and the remaining 50% unsure. Younger adults, males, and those in AB or C1 households are more likely to believe that gaming is regulated, although this is still a minority view, with a higher proportion unsure.

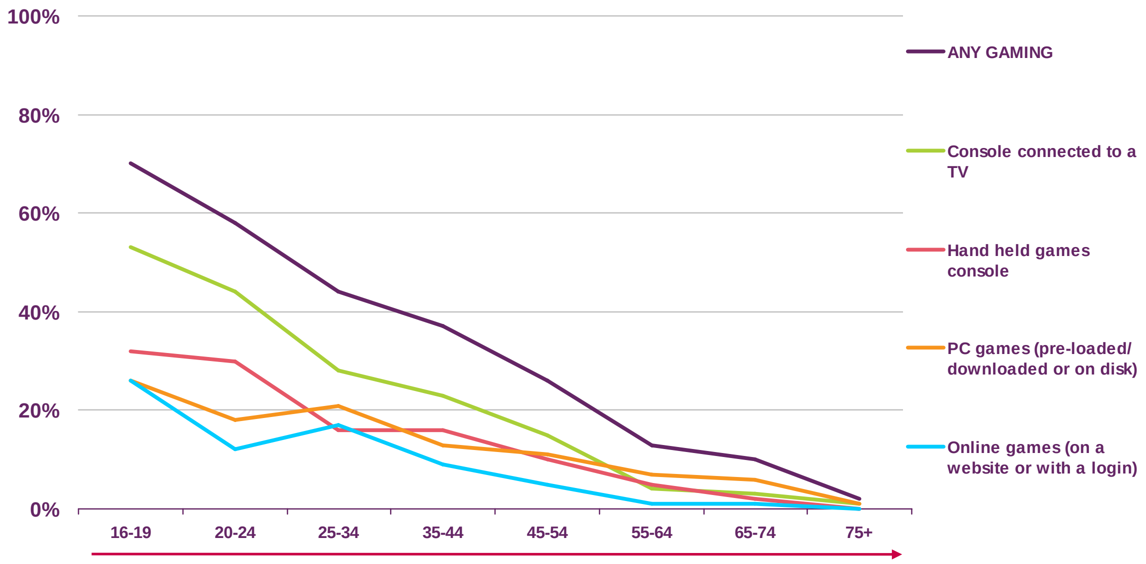
Two in three adults believe that *violent games can affect behaviour outside the game*, and half believe that *violence in games can have more impact on behaviour than violence on TV or in films*. Levels of agreement among gamers are at similar levels as for all adults. One in three adults believe *that gaming skills are useful in everyday life*, rising to around half of gamers.

While three in ten adults are concerned about gaming, this is lower for the youngest adults (under 25). Concerns are most likely to relate to offensive content. Females, those in AB households and those with children in the household are more likely to have concerns.

5.2 Incidence of gaming

All adults were prompted with a list of four possible ways of playing electronic games, referred to in this report as gaming. Figure 85 shows the proportion of all UK adults aged 16 and over who report any type of gaming, and also each of the four types from the prompted list.

Figure 85: Incidence of gaming, by age

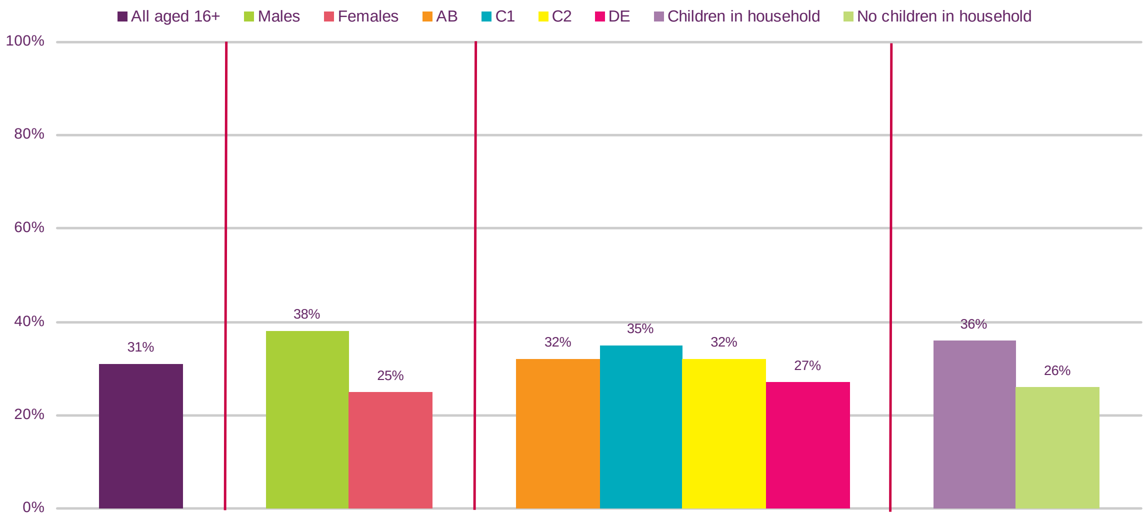


G1 – Do you ever play games in any of these ways?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Three in ten UK adults (31%) ever play games in any of the ways shown in Figure 85, with the most common method being a games console connected to a television. Experience of gaming decreases by as age increases: 70% of 16-19 year olds, dropping to 2% of those aged 75 and over. The dip in incidence of playing PC and online games among those aged 20-24 compared to 16-19 year olds and 25-34 year olds matches the lower take-up of the internet among this age group, as shown earlier in Figure 3.

Figure 86 shows the incidence of gaming (using any of the methods shown in Figure 85) by other demographic groups where findings differ significantly.

Figure 86: Incidence of gaming, by key demographic group



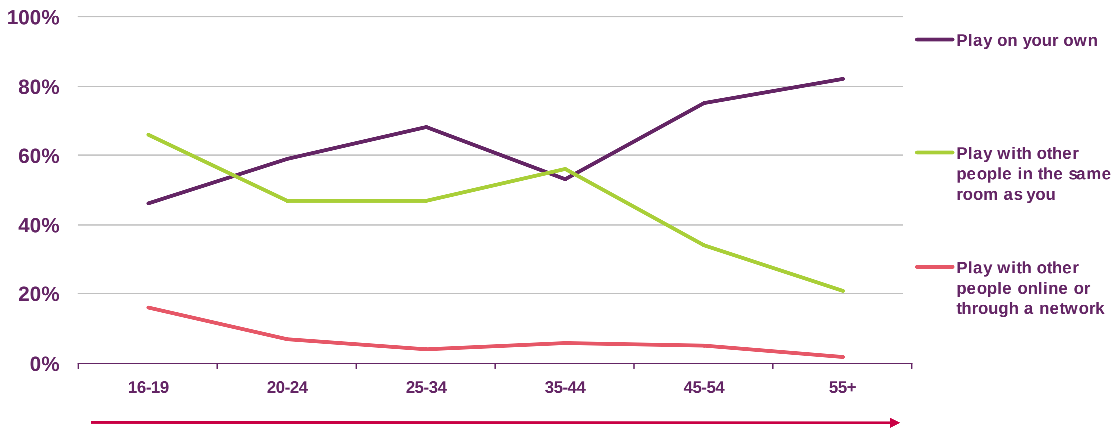
G1 – Do you ever play games in any of these ways?
Base: All adults aged 16+ (2905 aged 16+, 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE, 1481 children in household, 1306 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The incidence of gaming is higher for males and for those with children in the household. Across the socio-economic groups, there is a lower incidence of gaming among adults in DE households.

5.3 Gaming alone or with others

Those who ever play electronic games were asked whether they regularly play on their own, with others in the same room or with others online or through a network. Figure 87 shows responses from each age group.

Figure 87: Gaming alone or with others, by age



G1 – Do you ever play games in any of these ways?
Base: All adults aged 16+ (146 aged 16-19, 111 aged 20-24, 188 aged 25-34, 206 aged 35-44, 114 aged 45-54, 75 aged 55+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The youngest gamers, aged 16-19, are the only group more likely to play with others in the same room than to play on their own. They are also the group most likely to play games online or through a network, although this applies to less than one in five gamers aged 16-19. Playing online is more common among males and among those with no children in the household.

5.4 Estimated volume of weekly gaming

Adult gamers were asked to estimate how many hours they spend gaming in a typical week. Figure 88 compares the estimated average weekly hours spent gaming overall, across each age group and for other key demographic groups, where findings differ significantly. Because these estimates are self-reported it is likely that a degree of under- or over-reporting will be present, and the estimates shown should be taken as indicative only. A dotted vertical line is shown to mark the average weekly hours of gaming for adult gamers as a whole.

Figure 88: Weekly hours spent gaming, by age

G3 – How many hours in a typical week would you say you play electronic games?
Base: All adults aged 16+ who play electronic games (843 aged 16+, 146 aged 16-19, 111 aged 20-24, 188 aged 25-34, 206 aged 35-44, 114 aged 45-54, 75 aged 55+, 493 males, 350 females, 150 AB, 265 C1, 194 C2, 232 DE, 487 children in household, 321 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Gamers aged under 25, and those in DE socio-economic group households, play games for more hours in a typical week than the average across all adults. Males play for more hours than females, as do people in households with no children.

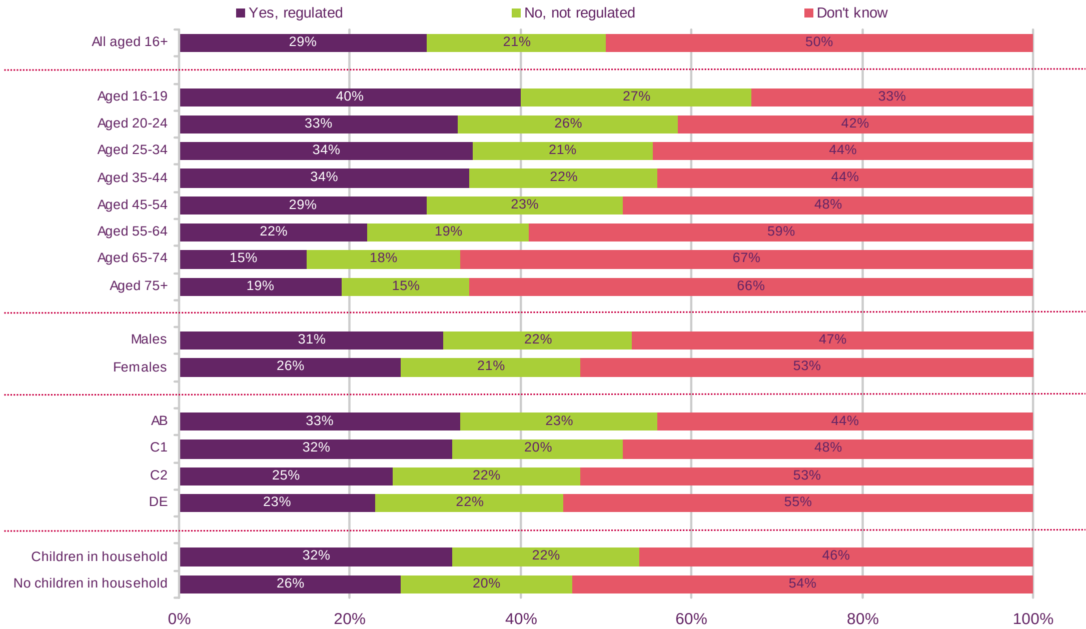
5.5 Gaming regulation

There is an industry self-regulatory framework in place for video games, under which games are voluntarily rated and labelled under the Pan European Game Information system (PEGI). PEGI ratings (3+, 7+, 12+, 16+ and 18+) provide information to consumers about the ages for whom a particular game is appropriate. In addition, in the UK, games with adult content (gross violence, criminal or sexual activity) must be reviewed and rated by the British Board of Film Classification, and bear a BBFC label. Under the Video Recordings Act 1984, games which receive BBFC 18 rating must not be sold to minors.

All adults were asked whether gaming is regulated, with a description[7] of a regulator provided where necessary. Figure 89 shows responses from all adults aged 16 and over, as well as each of the age groups and the key demographic groups showing differences in responses to this question.

[7] A regulator is often called a 'watchdog' – it sets rules/ guidelines about content. People can also complain to the regulator if they feel content has included something that they thought was inappropriate e.g. because it was offensive, harmful, inaccurate or unfair

Figure 89: Is gaming regulated?



G6 – As far as you know, is gaming regulated at all?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE, 1481 children in household, 1306 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

There is little consensus across UK adults as a whole on whether gaming is regulated, with a higher proportion of adults unsure than having an opinion on whether it is or not. Adults aged 55, those in DE socio-economic group households, females and those with no children in the household are more likely to be unsure whether games are regulated or not.

Adults aged under 45 and those in ABC1 socio-economic group households are the most likely to believe that gaming is regulated. Males are more likely to believe this than females, as are those with children in the household. Those more likely to be gamers, therefore, are more likely to believe that gaming is regulated.

Among gamers themselves there is still no majority opinion as to whether games' content is regulated, with a higher proportion responding positively (42%) than negatively (26%), and the remainder (32%) unsure.

5.6 Attitudes towards gaming

Adults were asked to indicate the extent to which they agree or disagree with three statements about gaming. Figure 90 shows responses from all adults, gamers aged under 35 and gamers aged 35 and over.

Figure 90: Attitudes towards gaming, across all adults, younger and older gamers

G7B-D – Could you please use this card to choose an answer to show how much you agree or disagree with some things that other people have said about gaming?
Base: All adults aged 16+ (2905 aged 16+, 445 gamers aged 16-34, 395 gamers aged 35+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

A majority of adults agree that *Violent games can affect people's behaviour outside the game*, although one in four give a neutral (neither agree nor disagree) response or do not know. A majority of gamers also agree with this statement, with higher agreement among older gamers, aged 35 and over. Females (whether gamers or not) and those in the AB socio-economic group are more likely to agree with this statement.

Half of all adults agree that *Violence in games can have more impact on people's behaviour than violence on TV or in films*, although two in five give a neutral (neither agree nor disagree) response or do not know and one in ten disagree. Around half of all gamers also agree with this statement, with higher agreement among older gamers, aged 35 and over. Those with children in the household (whether gamers or not) are more likely than those with no children in the household to agree with this statement.

One in three adults agree that *The skills you need to play games well are useful in everyday life*, although two in five give a neutral (neither agree nor disagree) response or do not know and one in four disagree. Around half of all gamers also agree with this statement, with higher agreement among older gamers, aged 35 and over.

5.7 Concern about gaming

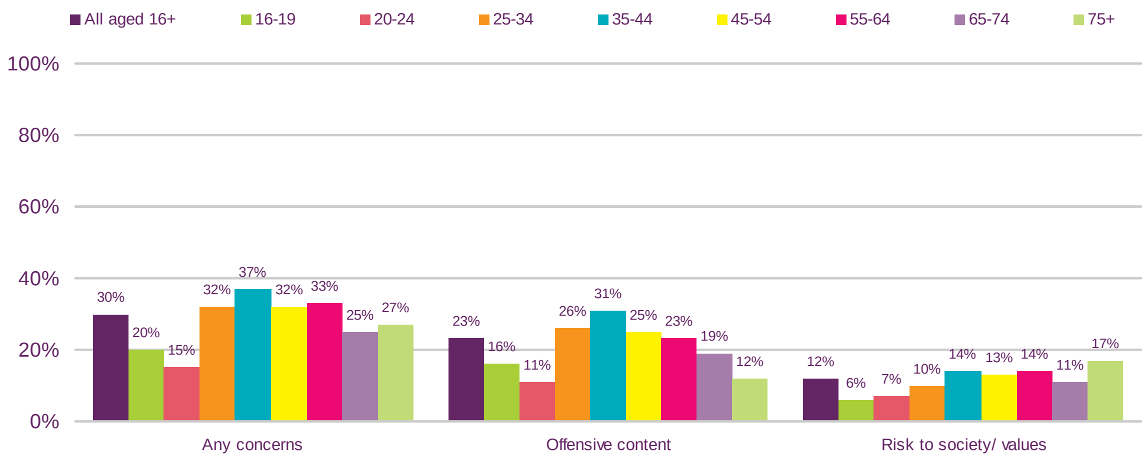
Adults were asked to mention, without prompting, any concerns they have about gaming and were then asked to respond, using a scale, to say how concerned they are about gaming.

The unprompted responses have been grouped into two themes, by type of concern:

- offensive content - relating to responses such as violent content, bad language and sexual content; and
- risk to society/ values - relating to responses such as unsuitable for children, encourage children to stay indoors and impact on social skills.

Figure 91 shows responses from all adults regarding any concerns they have about gaming.

Figure 91: Concerns about gaming, by age

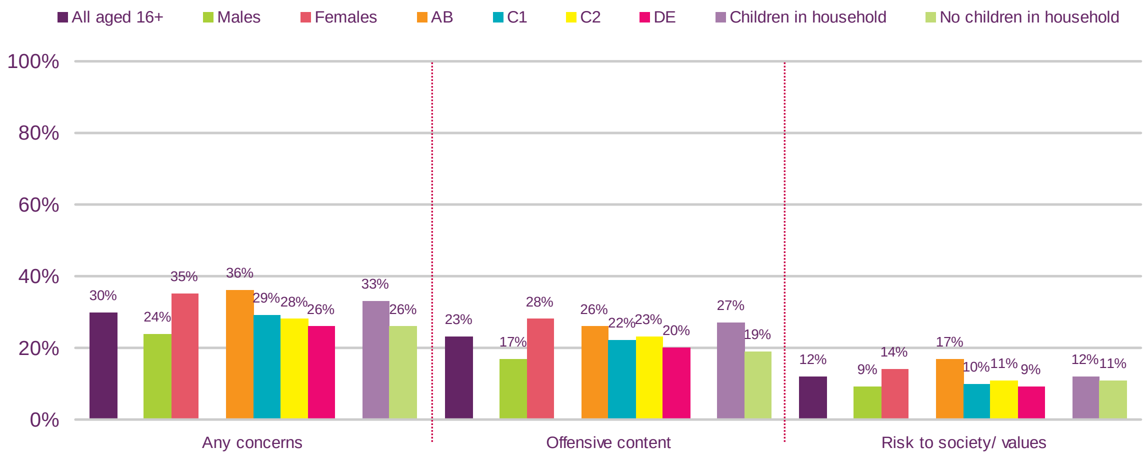


G4 – Can you tell me if you have any concerns about gaming?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While three in ten adults mention any concerns about gaming, mentions are lower for the youngest (aged under 25) adults. Around one in five adults aged under 25 mention any concerns, compared to nearly two in five of those aged between 35 and 44, and one in four of those aged 65 and over. Older adults aged 55 and over are more likely than adults as a whole to respond that they do not know whether they have any concerns about gaming.

Figure 92 compares responses from the key demographic groups showing differences in responses to this question.

Figure 92: Concerns about gaming, by key demographic group



G4 – Can you tell me if you have any concerns about gaming?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Females are more likely to have concerns relating to gaming overall, offensive content and risk to society/ values.

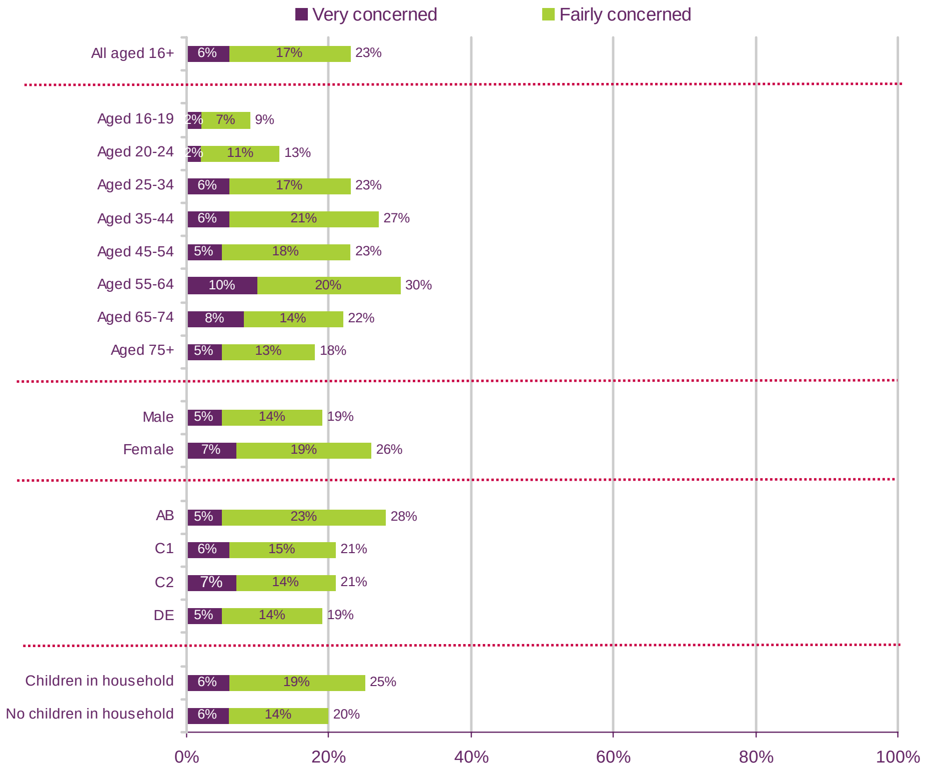
Across the socio-economic groups, AB adults are more likely to mention concerns about gaming than adults as a whole, particularly ABs.

Those with children in the household are more likely to have concerns about gaming and to have concerns relating to offensive content.

Among the 6% of adults shown in Figure 93 to be very concerned about gaming, two-thirds (70%) mention concerns related to offensive content.

Figure 93 shows the proportion of all adults who are either very, or fairly, concerned about gaming.

Figure 93: Degree of concern about gaming



G5 – Overall, how concerned are you about gaming?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 Males, 1535 Females, 552 AB, 836 C1, 605 C2, 897 DE, 1481 children in household, 1306 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

One in five of all UK adults (22%) are concerned about gaming, with three in four of these fairly concerned as opposed to very concerned.

Concern about gaming is lower among those aged under 25, and males. Concern is higher for those aged 35-44, those aged 55-64, and those in AB socio-economic group households. Females and those with children in the household are more concerned about gaming.

While a similar proportion of gamers are concerned about gaming compared to all adults (20% vs 22% respectively), the proportion stating they are not concerned is higher (71% of gamers compared to 61% of adults), and so fewer gamers give a neutral response to this question.

Section 6

Radio

This section looks at radio in detail, covering issues such as incidence of listening to radio generally and digital radio at home, the main reason for listening to radio, interest in digital radio functions among listeners, trust in radio content, attitudes towards radio, understanding sources of funding and regulation, and concerns about what is on radio.

6.1 Summary

The incidence of listening to radio at home has decreased since 2005 (from 86% to 73%), although the incidence of listening to DAB radio has increased (from 6% to 13%). The incidence of listening to digital radio through a digital TV service (17%) or online (9%) has not changed. Listening to radio at home is less common among 16-19 year olds, although this age group is more likely to listen to radio online.

Interest in the functions available through some types of DAB radio listeners is relatively low compared to interest in digital TV, internet/ computer, and mobile phone functions. Levels of confidence with these functions among DAB radio listeners are also lower than for other digital media, partly because some functions are restricted to certain models of DAB radio.

Radio is more likely to be seen as having a role in providing entertainment than providing education, particularly among younger listeners. Radio listeners are as likely to feel that *radio broadcasts should be free to be expressive and creative* as they are to feel that *radio listeners should be protected from hearing inappropriate or offensive content*. Among older adults (aged 75 and over), protection outweighs freedom of expression.

Three in five agree they tend to trust what they hear on the radio, conversely one in seven adults say they *don't tend to trust what they hear when they listen to radio*.

Although more than three in five of all adults are aware of how BBC radio stations (62%) and commercial radio stations (70%) are funded, awareness has decreased since 2005. Awareness of funding is lower for younger adults, aged under 35, females, and those in C2 or DE households. A majority of adults (63%) believe that *it doesn't matter who owns radio stations or how they are funded, so long as it provides good programmes*.

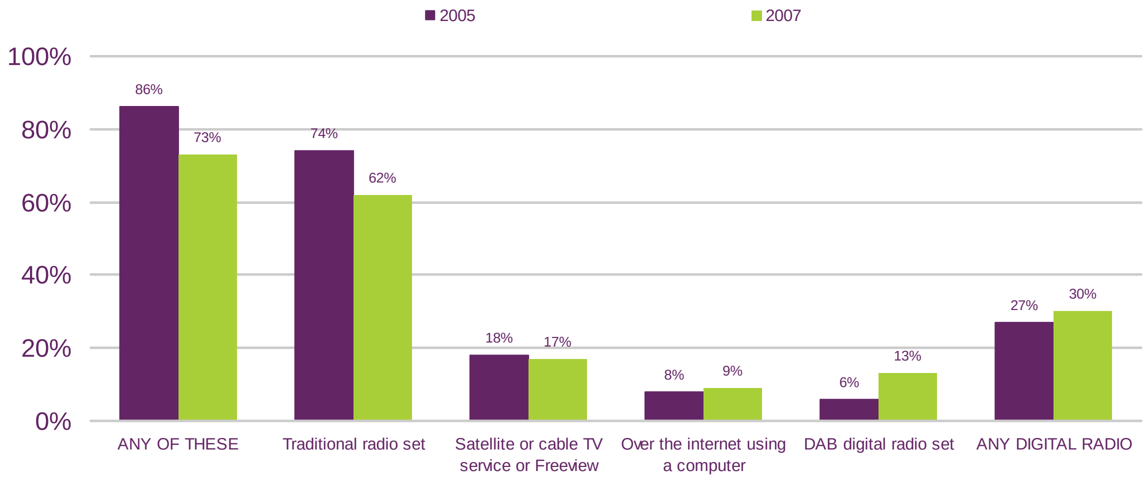
More than half of all adults (58%) believe that radio programmes are regulated, with no change since 2005, although those aged under 25, those aged 65 or over, females and those in DE households are less sure.

Around one in ten adults have concerns about what is on radio; this does not vary to any significant extent by age. Concerns are equally likely to relate to poor quality content as to offensive content. Those in AB households are more likely to have any concerns about what is on radio. The level of concern about what is on radio stands at one in twenty adults and has not changed since 2005.

6.2 Listening to radio at home

Figure 94 shows the ways in which UK adults listen to radio at home. Findings from the 2005 and 2007 Media Literacy Audit are shown alongside each other for comparison.

Figure 94: How adults listen to radio at home, 2005 and 2007



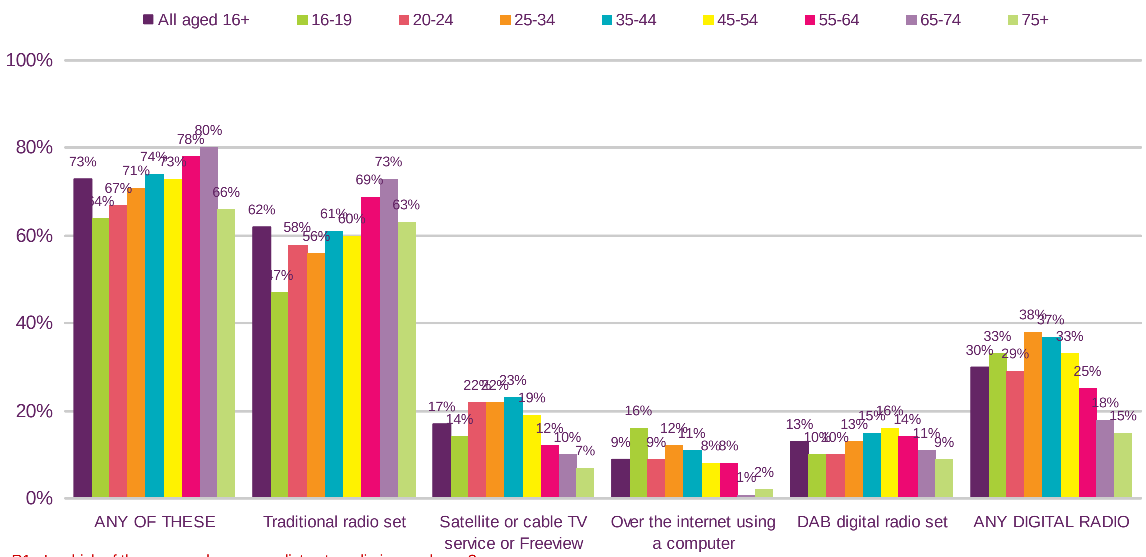
R1 – In which of these ways, if any, do you ever listen to radio in your home?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

There has been an increase in listening to digital radio since 2005, driven by an increase in listening to DAB digital radio. However, overall the incidence of listening to radio at home has decreased since 2005; due to a decrease in listening through a traditional radio set that has not been replaced by the digital radio. It is clear, though, that traditional radio sets are still the most common way to listen to radio.

The overall decrease in listening to radio at home since 2005 is more evident among adults aged under 35, those aged 45-54 and those in the C2 socio-economic group.

Figure 95 compares how adults in each of the age groups listen to radio at home.

Figure 95: How adults listen to radio at home, by age



R1 –In which of these ways do you ever listen to radio in your home?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Although listening to radio in general at home is less common for those aged 16-19 compared to adults as a whole, these younger adults are more likely to listen to radio over the internet, as are those aged 25-44. While three in ten adults listen to any digital radio, this is more common for those aged 25 to 44, and less common for over-55s.

Table 8 shows how adults listen to radio at home by demographics.

Table 8: How listen to radio at home, by key demographic groups

	ANY OF THESE	Traditional radio set	Satellite or cable TV service or Freeview	DAB digital radio	Over the internet using a computer	ANY DIGITAL RADIO
	%	%	%	%	%	%
All adults aged 16+ (2905)	73	62	17	13	9	30
Males (1370)	75	61	18	16	10	32
Females (1535)	72	62	17	10	8	28
AB (552)	76	66	22	19	13	36
C1 (836)	75	59	18	16	10	35
C2 (605)	71	60	16	9	5	26
DE (897)	70	61	13	6	5	21
Children in household (1481)	72	59	22	13	10	34
No children in household (1306)	74	64	13	13	7	27
Urban (2208)	73	62	17	13	9	30
Rural (697)	76	63	18	13	8	32
Visual impairment (131)	61	54	7	6	3	13
Hearing impairment (116)	73	63	9	10	3	21
Mobility impairment (230)	64	57	10	13	2	21

R1 – In which of these ways do you listen to radio in your home?
Base: All adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While males and females do not differ in terms of their overall incidence of listening to radio at home, males are more likely to listen to any digital radio; this is related to a higher uptake of DAB radio. Those with children in the household are also more likely to listen to any digital radio, because they are more likely to listen through their digital television service or over the internet.

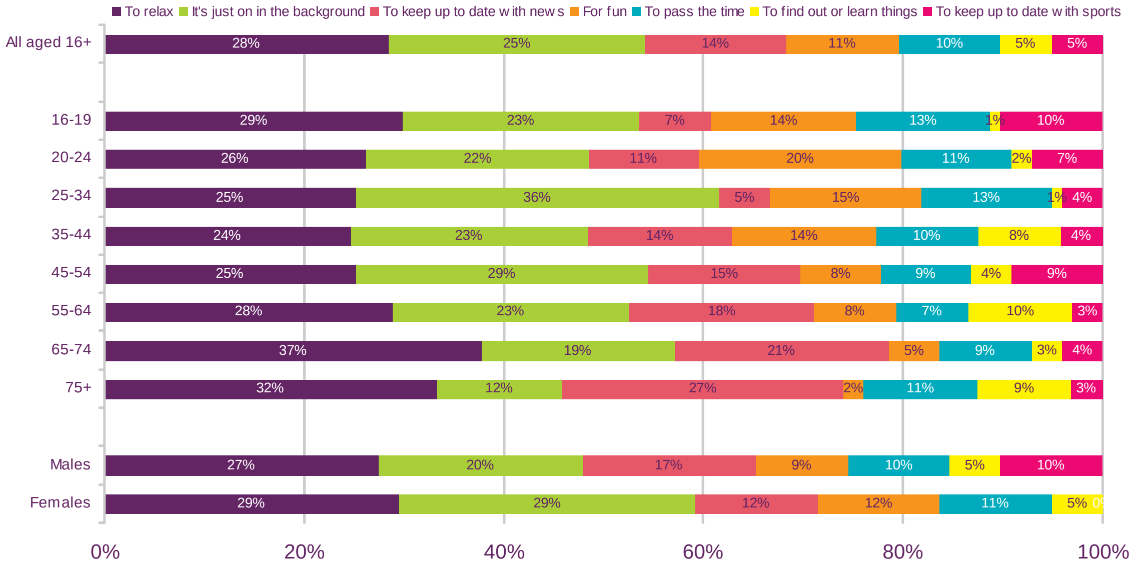
Adults in AB households are more likely to listen to radio at home through each of the four methods, compared to adults as a whole.

Those in urban areas and those with a visual or mobility impairment are less likely to listen to radio at home.

6.3 Main reason for listening to radio

All adults who listen to radio at home (73%) were prompted with a list of possible reasons for listening to radio and were asked to say which, if any, were applicable to them. Having made this selection, they were then asked to choose their main reason from the list. Figure 96 shows the main reason given by radio listeners.

Figure 96: Main reason for listening to radio, by age and gender



R14 – Which one is your main reason for listening to radio?
Base: Adults aged 16+ who listen to radio at home (2043 aged 16+, 132 aged 16-19, 138 aged 20-24, 327 aged 25-34, 465 aged 45-54, 263 aged 55-64, 271 aged 65-74, 104 aged 75+, 977 males, 1066 females)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

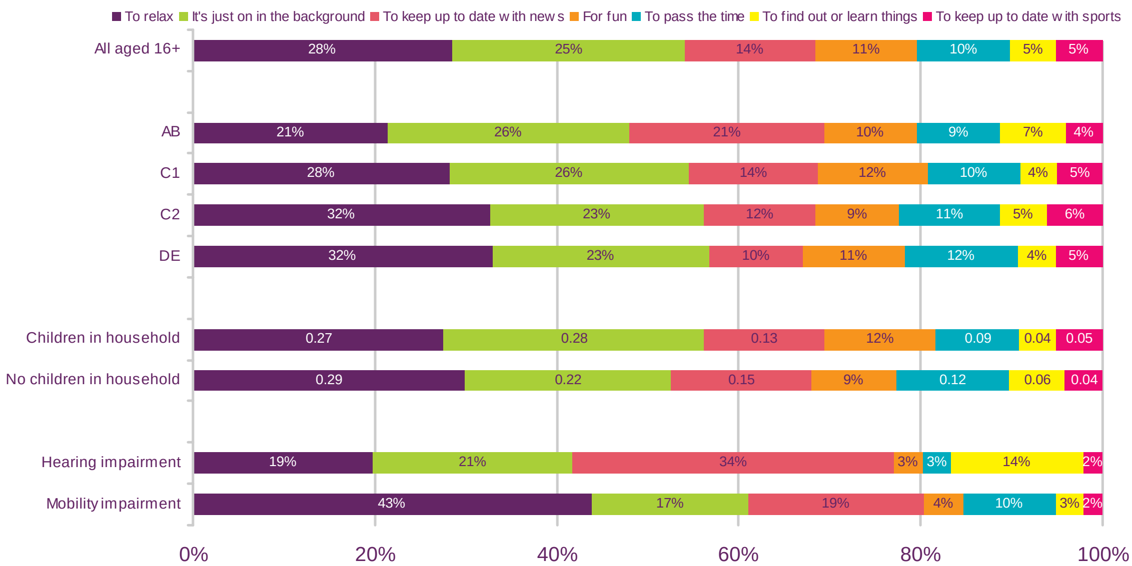
Unlike television, the internet and mobile phones (shown in Figure 8, Figure 39 and Figure 75), there is no single main reason for listening to radio given by half or more of all adults. Two main reasons together account for half of all adults who listen to radio at home; *to relax* and *having it on in the background*. There are few differences across the age groups for these two main reasons, but the main reason for the oldest adults tends towards having the radio on *to relax*.

More differences are evident for the less-mentioned main reasons for listening to radio. Adults aged under 45 are more likely than older adults to listen *for fun*. Adults aged 65 and over are more likely than younger adults to listen *in order to keep up to date with news*.

Males are more likely to listen to the radio *to keep up to date with news or sports*. Females are more likely to say they have the radio *on in the background* or *for fun*.

Figure 97 shows the main reason for listening to radio given by adults in the other key demographic groups, where findings differ significantly.

Figure 97: Main reason for listening to radio, by key demographic group



R14 – Which one is your main reason for listening to radio?
Base: Adults aged 16+ who listen to radio at home (2043 aged 16+, 427 AB, 584 C1, 420 C2, 604 DE, 1031 children in household, 927 no children in household, 78 hearing impairment, 142 mobility impairment)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Adults in AB households are more likely to listen *to keep up to date with news*. Other main reasons do not differ across the socio-economic groups.

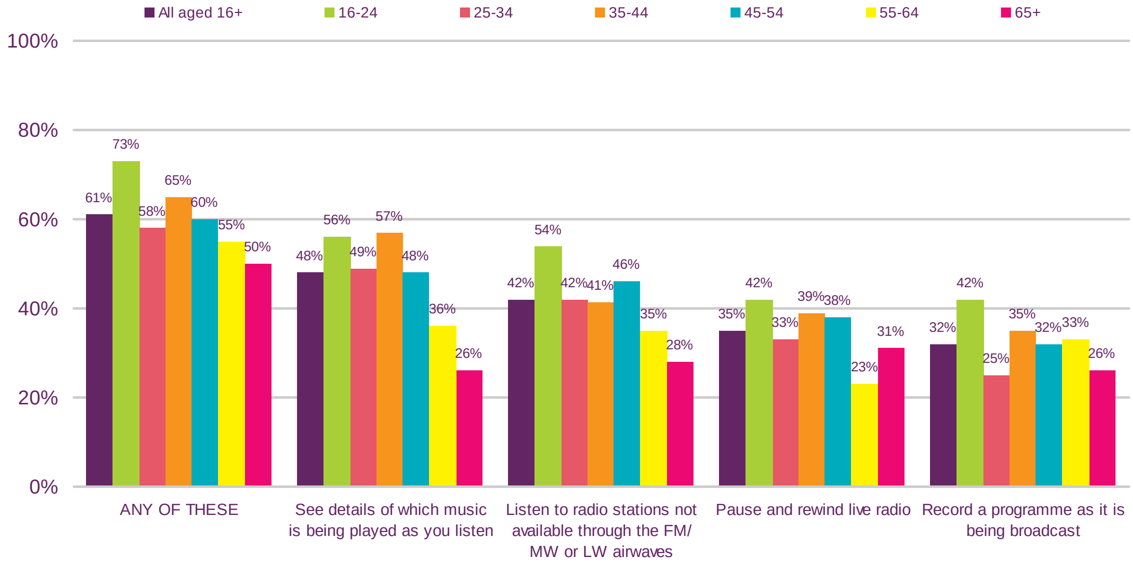
Those with children in the household and those with a mobility impairment are more likely to listen *to relax*.

Those with a hearing impairment are more likely to listen *to keep up to date with news* and *to find out or learn things*.

6.4 Interest in digital radio functions

Those who listen to digital radio at home (30%) were prompted with four functions that are available through some DAB radio sets. For each function they were asked to say if this was something they were interested in. Some of these functions (detailed in Figure 98) are specific to certain models of DAB radio rather than digital radio platforms generally, which may have influenced interest levels.

Figure 98: Interest in digital radio functions among digital radio listeners, by age



R3 – I'm going to read out some different types of things you can do with some kinds of digital radio, and for each one I'd like you to say which of the options on the card applies to you
Base: All adults aged 16+ who listen to radio at home (766 aged 16+, 127 aged 16-24, 146 aged 25-34, 208 aged 35-44, 133 aged 45-54, 76 aged 55-64, 74 aged 65+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

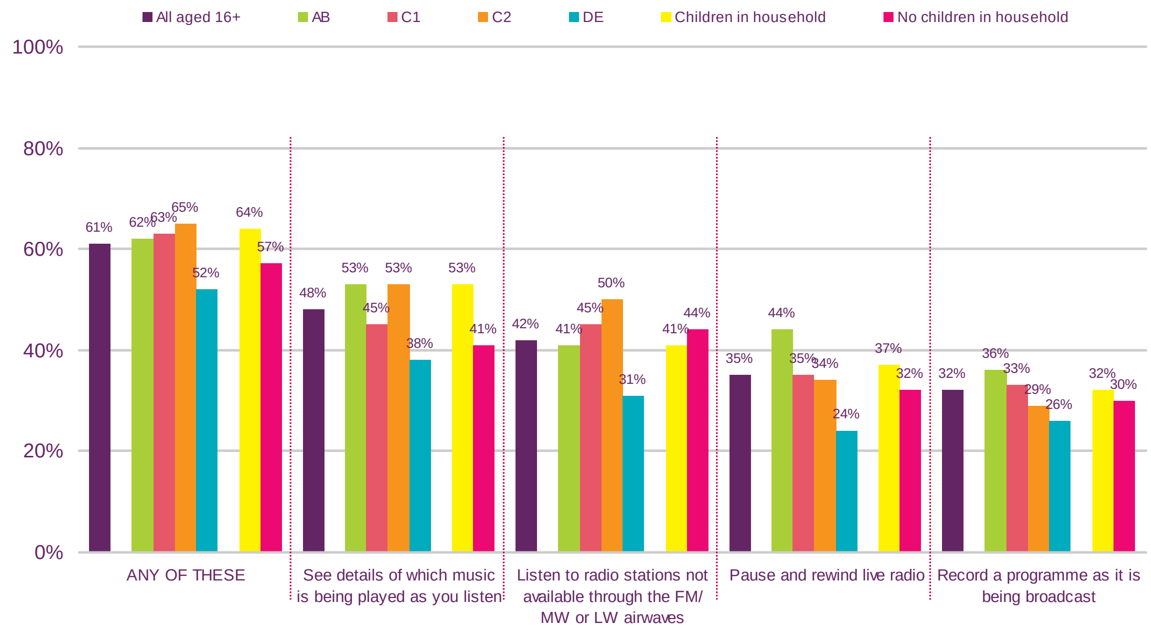
Three in five adults who listen to digital radio are interested in at least one of the four functions, with interest levels above average for those aged 16-24. These younger digital radio listeners are particularly interested in listening to radio stations not available through the FM/ MW/ LW airwaves and recording a programme as it is being broadcast compared with others. Digital radio listeners aged 35-44 are more interested in seeing details of the music that is being played while they listen in line with 16-24s.

Twenty per cent of all digital radio listeners are interested in all four functions, and this is significantly higher for those aged 16-24 (28%) and significantly lower for those aged 65 and over (9%). No single function is of interest to the majority of digital radio listeners which may be influenced by a higher proportion of those who listen to digital radio do so through their digital television service than through a DAB radio set.

As mentioned previously, several of these functions are specific to certain models of DAB radio rather than digital radio generally. Among DAB listeners, interest in at least one of the four functions stands at 70% (compared to 61% of all digital radio listeners), and interest in all four of the functions stands at 26% (compared to 20% of all digital radio listeners).

Figure 99 shows the level of interest across the four digital radio functions, both overall and individually, among the other key demographic groups, where findings differ significantly.

Figure 99: Interest in digital radio functions among digital radio listeners, by key demographic group



R3 – I'm going to read out some different types of things you can do with some kinds of digital radio, and for each one I'd like you to say which of the options on the card applies to you
Base: All adults aged 16+ who listen to radio at home (766 aged 16+, 196 AB, 247 C1, 146 C2, 172 DE, 436 children in household, 303 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Across the socio-economic groups, interest in any of the digital radio functions is lower for those in DE households. Those in AB households are more likely than adults as a whole to be interested in the function to pause and rewind live radio.

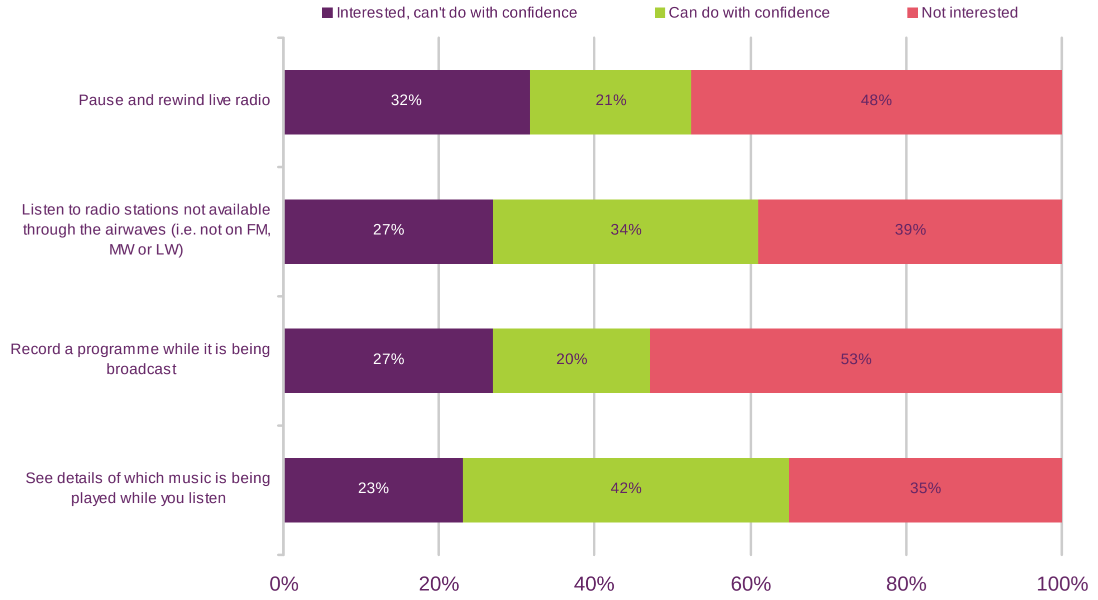
While overall levels of interest do not differ, those with children in the household are more interested in being able to see details of the music that is being played, as they listen.

6.5 Confidence with digital radio functions

Because the functions covered in the survey relating to digital radio are mostly specific to certain models of DAB radio, we have looked in more detail at the responses from those who listen to DAB radio.

We asked those DAB radio listeners interested in particular functions whether they could do the task with confidence. Figure 100 splits all DAB radio listeners into one of three groups for each of the four functions; those who are not interested, those who are interested and can do it with confidence, and those who are interested but cannot do it with confidence. The gaps in confidence are shown on the far left of Figure 100, are of particular interest in assessing media literacy.

Figure 100: Confidence with digital radio functions among DAB radio listeners



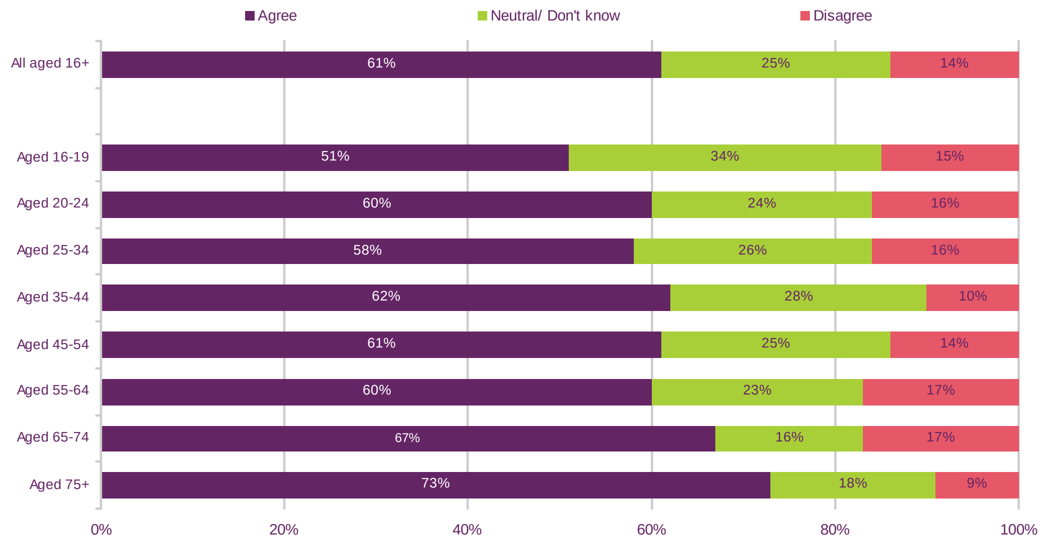
R3 – I'm going to read out some different types of things you can do with some kinds of digital radio, and for each one I'd like you to say which of the options on the card applies to you
Base: All adults aged 16+ who listen to DAB digital radio at home (295)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The confidence gap for the first, and the last two, functions shown Figure 100 could be a result of the model of DAB radio owned. The second function (listening to radio stations not available on analogue) is, however, available to all digital radio listeners. Around a quarter of DAB radio listeners say this is something they are interested in but not able to do with confidence, and this is more common among over-35s, and females.

6.6 Trust in radio content

Adults who listen to radio at home were asked to indicate the extent to which they agree or disagree with the statement *When I listen to radio, I tend to trust what I hear*. This statement encompasses all content heard by the respondent on all radio stations they listen to. Figure 101 shows responses from all adults who listen to radio at home, by age group.

Figure 101: Trust in radio content, by age



R12D – *'When I listen to radio I tend to trust what I hear'*
Base: All adults aged 16+ who listen to radio at home (2043 aged 16+, 132 aged 16-19, 138 aged 20-24, 327 aged 25-34, 465 aged 35-44, 339 aged 45-54, 263 aged 55-64, 271 aged 65-74 , 104 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Across all adults who listen to radio at home, three in five agree that *they tend to trust what they hear*, with one in four saying that they neither agree nor disagree with this. One in seven adults who listen to radio disagree with the statement. Those aged 75 and over are more likely than all adults to agree with *I tend to trust what I hear*.

Responses to this question do not vary to any significant extent across the other key demographic groups.

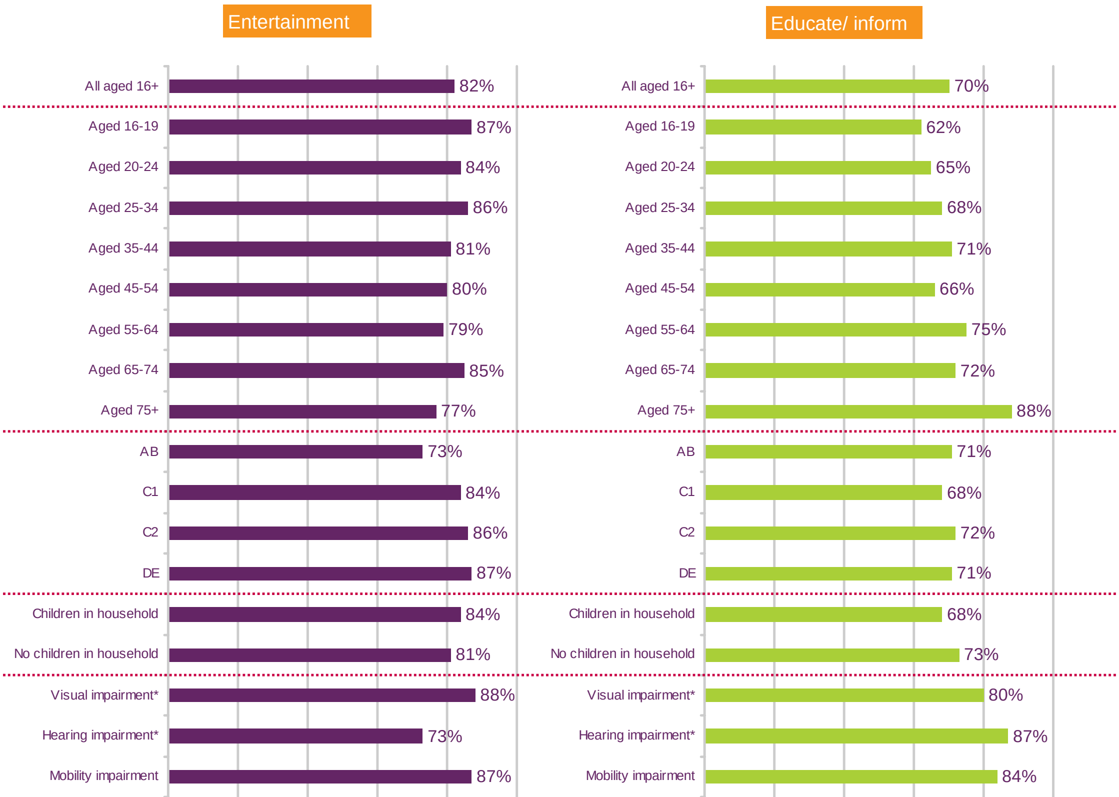
6.7 The role of radio

We prompted adults who listen to radio at home with a series of statements about radio and asked them to indicate the extent to which they agreed or disagreed with each one.

Figure 102 shows the proportion of those who listen to radio at home who agree that:

- *the main role of radio should be to provide entertainment; and*
- *the main role of radio should be to inform and educate people.*

Figure 102: Role of radio – *entertainment* and *education*



R12E-F – The main role of radio should be to provide entertainment/ The main role of radio should be to inform and educate people
Base: All adults aged 16+ who listen to radio at home (2043 aged 16+, 132 aged 16-19, 138 aged 20-24, 327 aged 25-34, 465 aged 35-44, 339 aged 45-54, 263 aged 55-64, 271 aged 65-74 104 aged 75+, 427 AB, 584 C1, 420 C2, 604 DE, 1031 with children in household, 927 without children in household, 79 with a visual impairment, 78 with a hearing impairment, 142 with a mobility impairment)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Across all radio listeners, four in five agree that the main role of radio should be *to provide entertainment* and seven in ten agree that the main role of radio should be *to inform and educate people*. While radio cannot be said to have a primary role, it is more likely to be seen as having a role to entertain than to educate and inform.

Certain groups of adults are more likely to agree that the main role of radio is to provide entertainment. While this does not vary to any significant extent by age, it is more common among those in the C2 and DE socio-economic groups, and less common among those with a hearing impairment.

Similarly, certain groups of adults are more likely to agree that the main role of radio is *to inform and educate people*. This is more common among those aged 75 and over, those with a hearing or mobility impairment, and those with no children in the household.

Nearly two in three (63%) radio listeners agree with both of these statements about the main role of radio, with no differences by age, but with a higher degree of overlap, compared to all adults, among those with a visual or mobility impairment (both 75%).

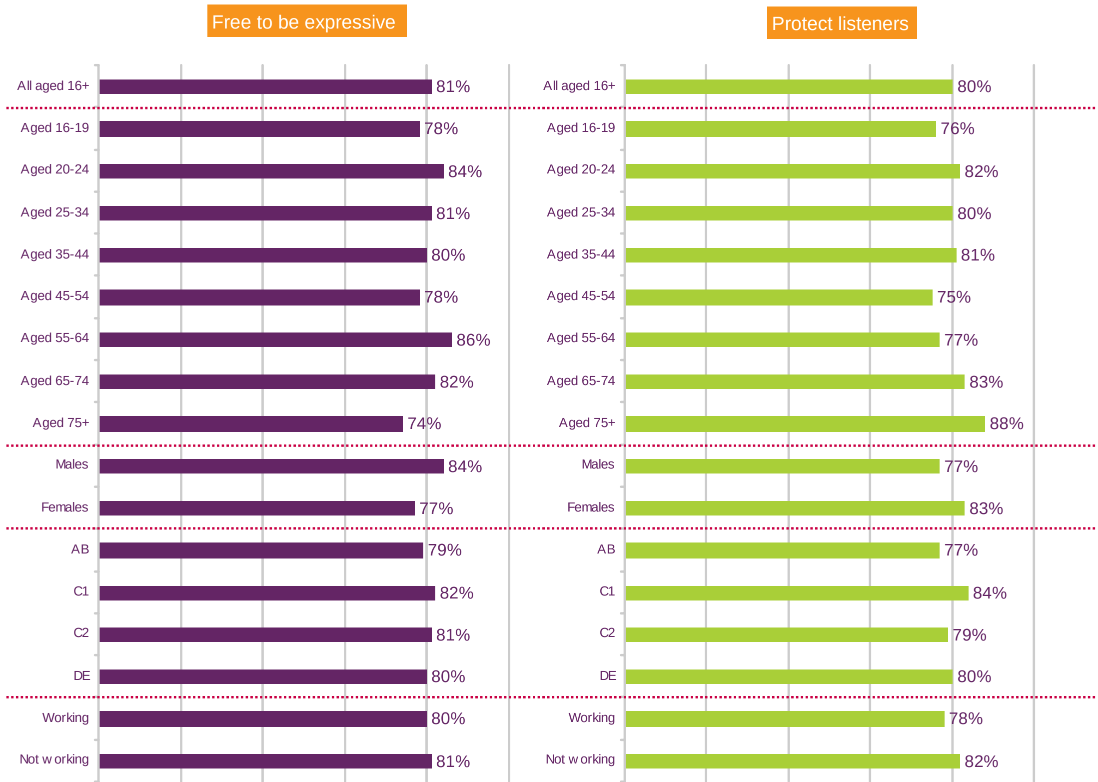
6.8 Attitudes towards radio

Figure 103 shows responses from those who listen to radio at home to the following statements:

- *radio broadcasts must be free to be expressive and creative; and*
- *radio listeners must be protected from seeing inappropriate or offensive content.*

For each statement Figure 103 shows the proportion agreeing (either strongly or slightly).

Figure 103: Attitudes towards radio – free to be expressive and protected from content



R12A-B – Radio broadcasts must be free to be expressive and creative/ Radio listeners must be protected from hearing inappropriate or offensive content
Base: All adults aged 16+ who listen to radio at home (2043 aged 16+, 132 aged 16-19, 138 aged 20-24, 327 aged 25-34, 465 aged 35-44, 339 aged 45-54, 263 aged 55-64, 271 aged 65-74, 104 aged 75+ , 977 males, 1066 females, 427 AB, 584 C1, 420 C2, 604 DE, 1041 working, 975 not working)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Among all adults who listen to radio at home, four in five agree with each of these two statements: *radio broadcasts must be free to be expressive and creative* and *listeners must be protected from inappropriate or offensive programme content*. Overall levels of agreement and disagreement that *radio broadcasts must be free to be expressive* have not changed since the 2005 Media Literacy Audit, but there has been an increase in the level of agreement that *radio listeners must be protected* since 2005 (from 75% to 80%).

Males and those aged 55-64 are more likely to agree that *radio broadcasts must be free to be expressive and creative*.

Females, those aged 75+, those in C1 households and those who are not working are more likely to agree that *radio listeners must be protected from hearing inappropriate or offensive programmes*.

Two-thirds (65%) of adults who listen to radio at home agree with both of these statements about radio content, with a higher degree of overlap among those who are not working (68%) compared with those who are working (63%).

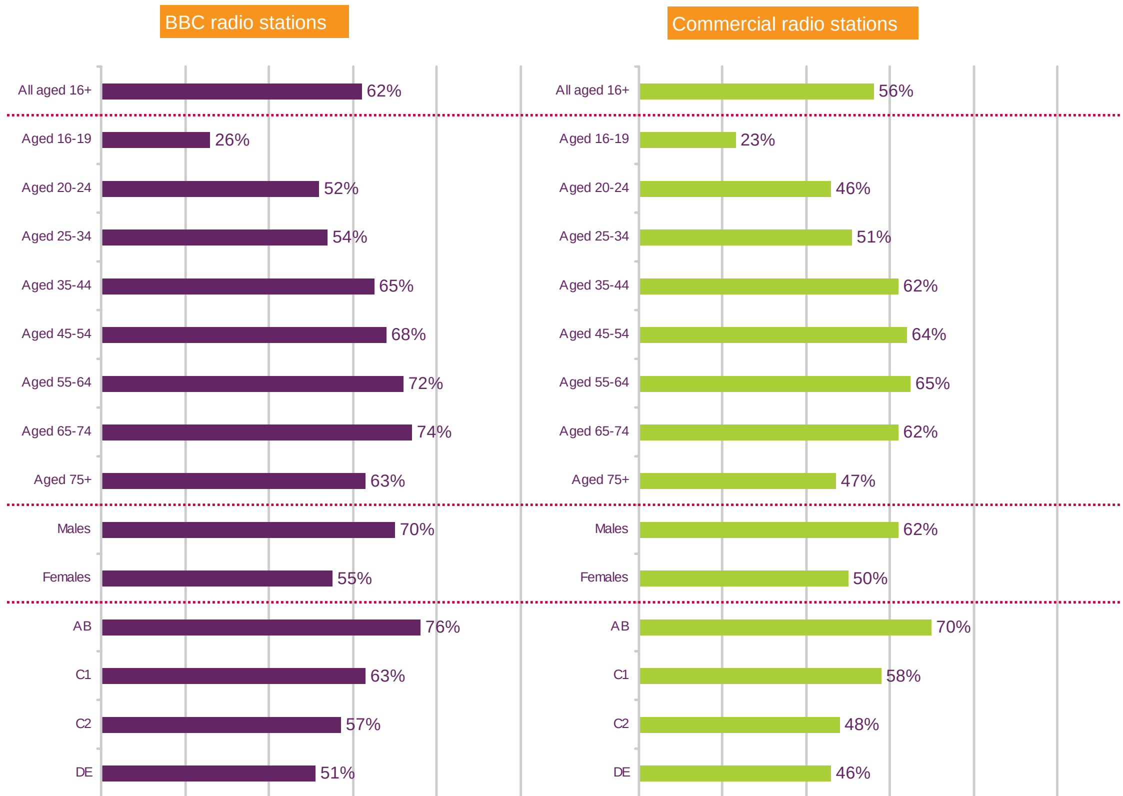
6.9 Understanding sources of radio funding

Funding of radio content
BBC stations are funded by the licence fee and commercial stations are funded by advertising (programme sponsorship provides a secondary revenue stream).

All adults were asked how BBC stations and commercial radio stations are mainly funded. Figure 104 shows the proportion giving the correct response (shown below) to each of these questions.

- BBC radio stations are mainly funded by the licence fee paid by the public.
- Commercial radio stations are mainly funded by advertising.

Figure 104: Correct understanding of how radio stations are mainly funded



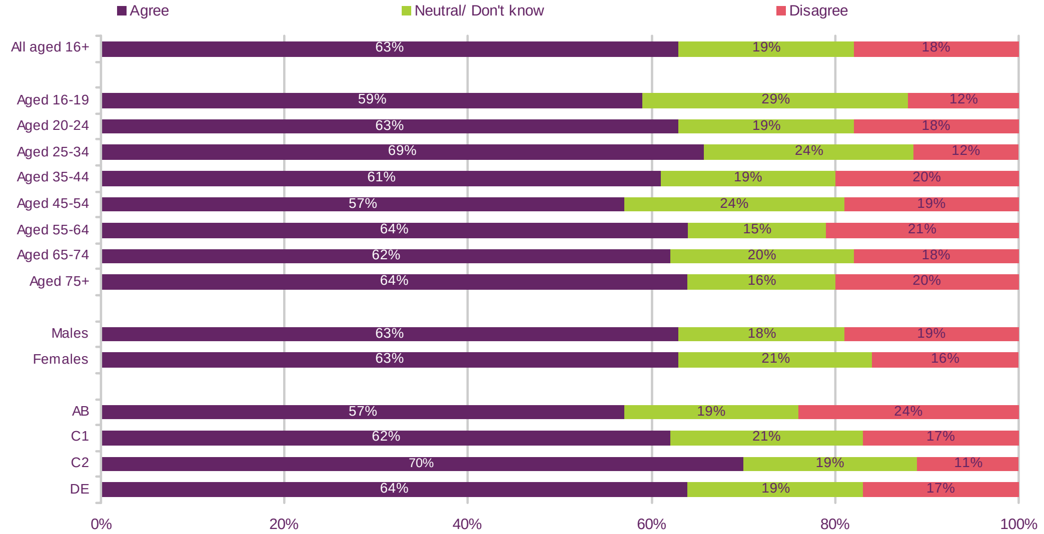
R5/R6 – How would you say BBC radio stations are mainly funded?/ How would you say the other main radio stations are mainly funded?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Three in five UK adults know how BBC radio stations are mainly funded and over half know how commercial radio stations are mainly funded; awareness is therefore higher for BBC radio station funding. Compared to the 2005 Media Literacy Audit, awareness of BBC radio stations' funding has decreased (from 65%) as has awareness of commercial radio stations' funding (from 61%). Awareness of radio funding is considerably below the levels of awareness of television funding (shown in Figure 22).

Awareness of radio stations' funding is lower for those aged under 34, females, and those in C2 and DE socio-economic group households.

We asked adults who listen to radio at home to indicate the extent to which they agree or disagree that *as long as radio provides good programmes it doesn't really matter who owns the stations or how they are funded*. Figure 105 shows responses from all radio listeners.

Figure 105: Attitudes towards radio – *doesn't matter who owns the stations or how they are funded*



R12C – *'As long as radio provides good programmes it doesn't really matter who owns the stations or how they're funded'*
Base: All adults aged 16+ who listen to radio at home (2043 aged 16+, 132 aged 16-19, 138 aged 20-24, 327 aged 25-34, 465 aged 35-44, 339 aged 45-54, 263 aged 55-64, 271 aged 65-74, 104 aged 75+ , 977 males, 1066 females, 427 AB, 584 C1, 420 C2, 604 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

A majority of all adults (62%) who listen to radio at home agree with this statement, with one in five overall disagreeing. Agreement is higher among those aged 25-34 and those in C2 socio-economic group households. Males and those in AB households are more likely to disagree with this statement.

Overall levels of agreement and disagreement with this statement have not changed since the 2005 Media Literacy Audit.

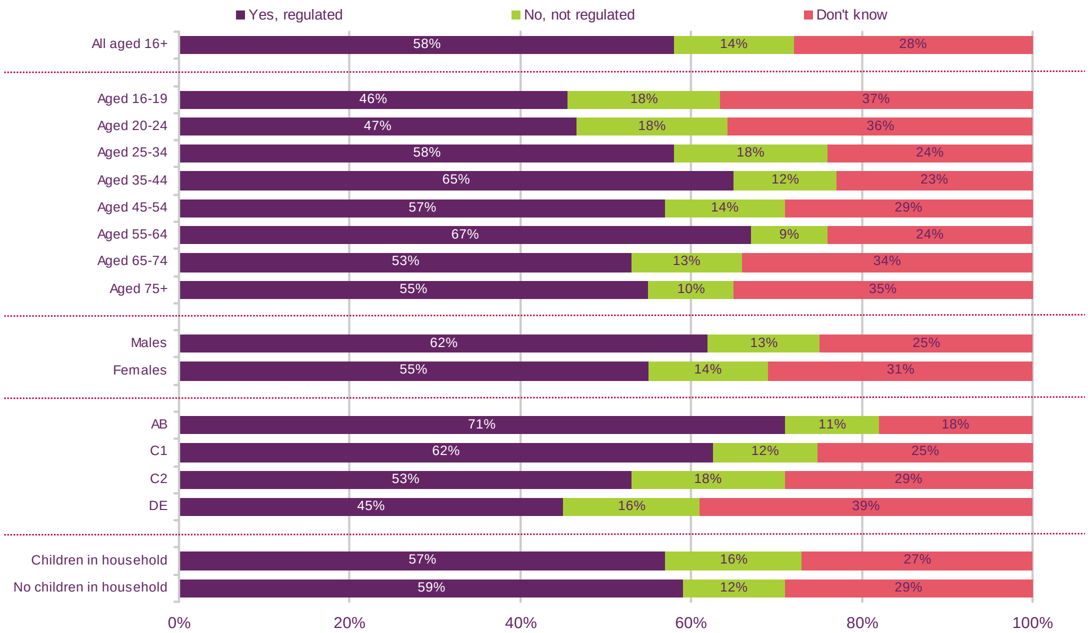
6.10 Radio regulation

Radio regulatory environment
BBC stations are regulated by the BBC Trust and Ofcom and UK commercial stations are regulated by Ofcom.

We asked people whether they thought radio was regulated, in terms of what can be broadcast, providing a description[8] of a regulator where necessary.

[8] A regulator is often called a 'watchdog' – it sets rules/ guidelines about content. People can also complain to the regulator if they feel content has included something that they thought was inappropriate e.g. because it was offensive, harmful, inaccurate or unfair

Figure 106: Are radio broadcasts regulated?



R9 – As far as you know, is radio regulated in terms of what can be broadcast?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE, 1481 children in household, 1306 no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While three in five of all adults believe that radio broadcasts are regulated, there is a great deal of variation in responses among the different age groups and across several of the key demographic groups.

Adults aged under 25, those aged 65 or over, females, and those in C2 or DE households are more likely than adults as a whole to say they do not know whether radio broadcasts are regulated.

Awareness of radio broadcast regulation has not changed across all adults since the 2005 Media Literacy Audit.

6.11 Concern about radio

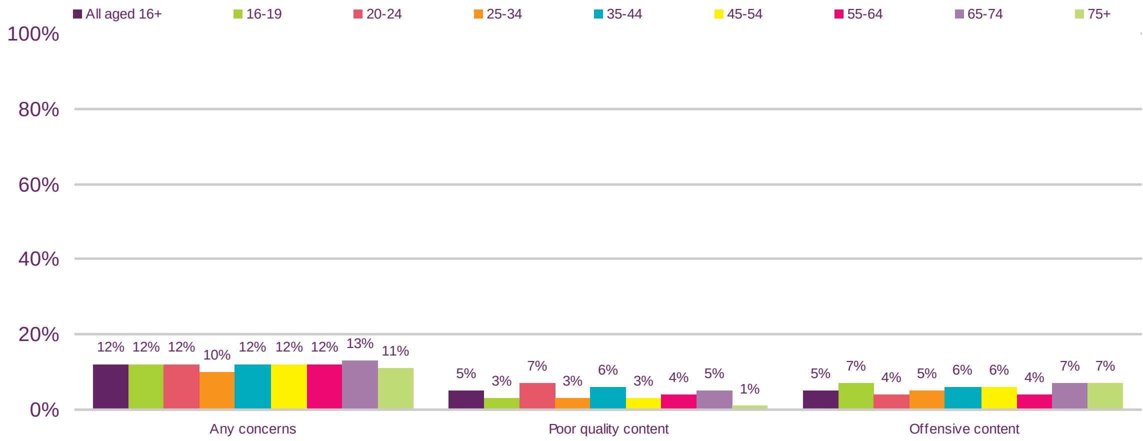
Adults were asked to mention, without prompting, any concerns they have about what is on radio, and were then asked to respond, using a scale, to say how concerned they are about what is on radio.

The unprompted responses have been grouped into two themes;

- poor quality content - relating to responses such as too many advertising breaks, lack of originality/ programmes are similar, and poor quality programmes; and

- offensive content - relating to responses such as bad language, bad taste / shock tactics and drug references

Figure 107: Concerns about what is on radio, by age

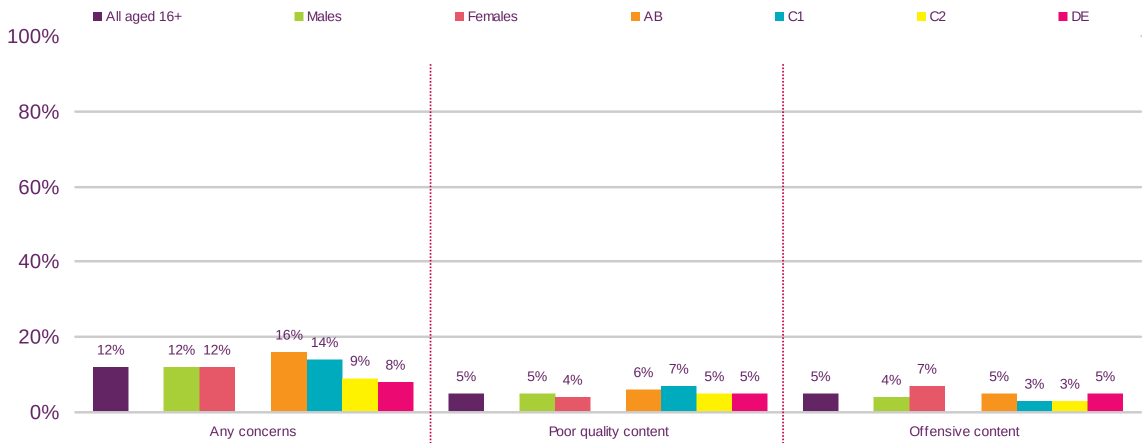


R7 – Can you tell me if you have any concerns about what is on radio? What sorts of things are you concerned about?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

One in ten adults mention any concerns about what is on radio, and this does not differ across the age groups.

Figure 108 compares responses by gender and socio-economic group.

Figure 108: Concerns about what is on radio, by key demographic group



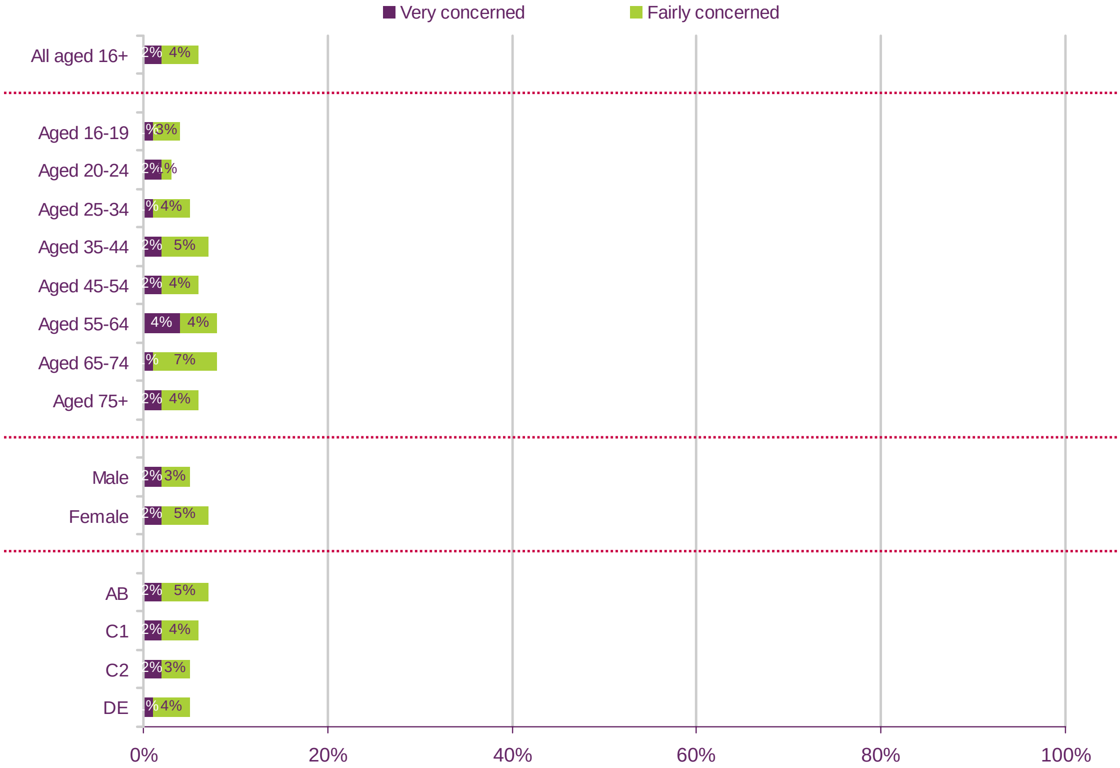
R7 – Can you tell me if you have any concerns about what is on radio? What sorts of things are you concerned about?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

At an overall level, females and males do not differ in mentioning any concerns about what is on radio, but females are more likely to mention concerns relating to offensive content.

Across the socio-economic groups, AB adults are more likely to mention any concerns about what is on radio than adults as a whole.

Among the 6% of adults (shown in Figure 109) who are either very, or fairly concerned, about what is on radio, these concerns are more likely to relate to offensive content (51%) than to poor quality content (32%).

Figure 109: Degree of concern about what is on radio



R8 – Overall, how concerned are you about what is on radio?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74 167 aged 75+ , 1370 Males, 1535 Females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Concern about radio is no higher for any particular age group, or between socio-economic groups, although females are more concerned. The degree of concern about what is on radio is the same among those who listen to radio at home as all for adults, and has not changed since the 2005 Media Literacy Audit.

Section 7

Attitudes and preferences

This section covers the media activities carried out by adults almost every day, the one media activity they would miss the most, and their preferences for, experience of and interest in learning about using digital technology.

7.1 Summary

Watching television remains the most common regular media activity, and has increased since 2005, with 97% of adults saying they watch television regularly. In addition, more adults say they regularly use a mobile phone and the internet, and listen to a portable music device or MP3 player. Fewer people say they read newspapers or magazines, listen to radio, watch videos/ DVDs or listen to music on a hi-fi / CD / tape player.

The range of regular media activities decreases with age, and is also narrower for those in DE households, compared to those in AB households.

Half (52%) of all adults say that watching television is the media activity they would miss the most, an increase since 2005. This increases with age, from one in five aged 16-19 to nearly four in five aged 75 and over. The youngest adults, aged 16-19, are more likely to say that the mobile phone is the media activity they would miss the most.

There are three main preferred methods of learning about digital technology: through friends or family, through trial and error, and by reading the manual. The first two of these have increased in preference since 2005. The youngest and oldest adults, and females, are more likely to prefer to learn through friends or family, while males and AB adults are more likely to prefer to learn through reading the manual.

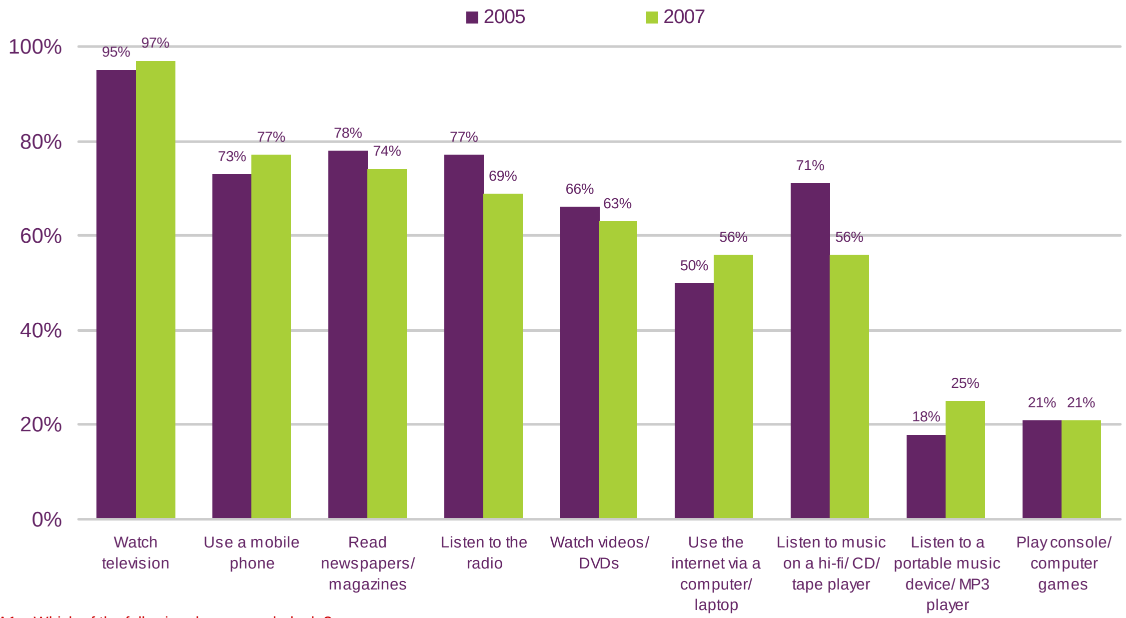
There has been an increase in learning about digital technology since 2005, with one in four adults having this experience, which mostly relates to learning about using the internet. There is a strong relationship with age; 51% of all 16-19s have learned about digital technology, compared to 7% of over-75s. Experience of learning is also more common for those in AB and C1 households and those who are working.

One in three adults are interested in learning about digital technology, as was the case in 2005. This is most common for the youngest adults and least common for the oldest. Interest in learning is also more common for those in AB and C1 households and those who are working.

7.2 Regular and most missed media activities

All adults were asked to select from a list of nine media activities to say which they do almost every day, and which of one these they would miss doing the most. Figure 110 shows regular media activities, comparing responses from the 2005 and 2007 Media Literacy Audit surveys.

Figure 110: Regular media activities, 2005 and 2007



A1 – Which of the following do you regularly do?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

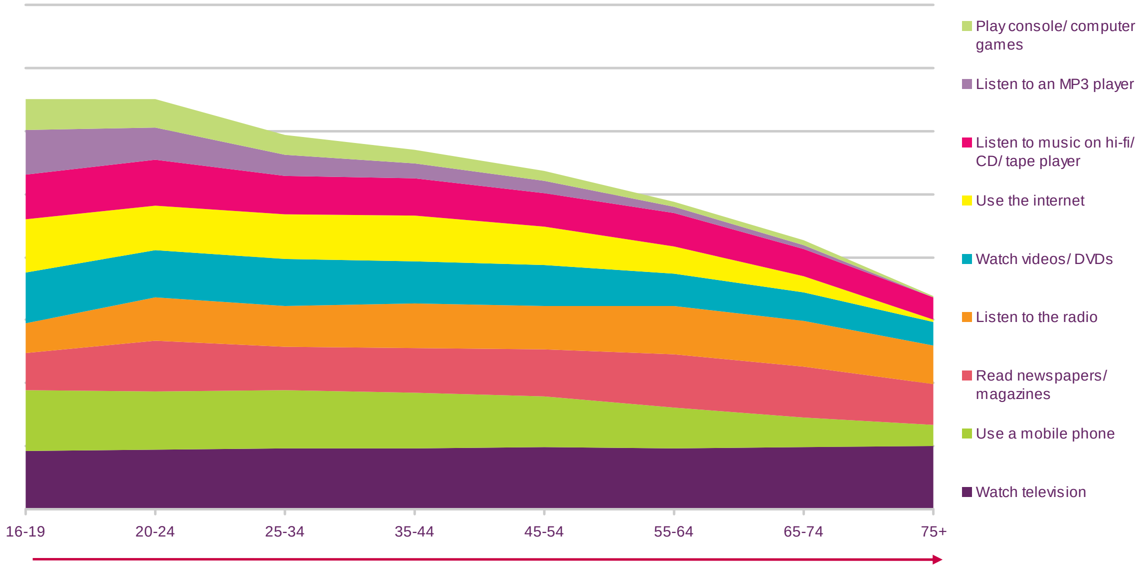
Watching television remains the most common regular media activity for UK adults; with almost all saying this is a regular activity. Seven of the nine activities are chosen by half or more of all adults.

Four media are named by a higher proportion of adults compared to 2005: watching television, using a mobile phone, using the internet, and listening to a portable music device or MP3 player. The greatest increase since 2005 is in the proportion of adults who listen to a portable music device or MP3 player.

Fewer people are reading newspapers / magazines, listening to radio, watching videos / DVDs, or listening to music on a hi-fi / CD / tape player than was the case in 2005. The greatest decrease since 2005 is in the proportion of adults who listen to music on a hi-fi / CD / tape player.

On average, 5.4 of the nine media activities we asked about were mentioned as regular activities. Figure 111 compares the range of regular media activities for each age group.

Figure 111: Range of regular media activities, by age



A1 – Which of the following do you regularly do?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The range of regular media activities decreases with age, with an average of 6.5 activities for 16-19 year olds, compared to 3.4 activities for those aged 75 and over. Watching television is the only activity which increases with age.

Figure 112 shows the regular media activities for males and females and those in each of the socio-economic groups.

Figure 112: Range of regular media activities, by gender and socio-economic group

A1 – Which of the following do you regularly do?
Base: All adults aged 16+ (2905 aged 16+, 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Six of the nine media are regular activities for a higher proportion of males compared to females: reading newspapers/ magazines, listening to radio, watching videos / DVDs, using the internet, listening to MP3 players, and playing console/ computer games. Females do not mention any media activity more than males.

Across the socio-economic groups, adults in AB households regularly use the broadest range of media. Those in DE households use the narrowest range of media, with fewer mentions of mobile phone, newspapers / magazines, radio, videos / DVDs, internet and MP3 players.

Figure 113 shows the regular media activities for other key demographic groups where responses differ significantly.

Figure 113: Range of regular media activities, by key demographic group

A1 – Which of the following do you regularly do?
Base: All adults aged 16+ (2905 aged 16+, 131 visual disability, 116 hearing disability, 230 mobility disability, 1481 children in household, 1306 no children in household, 2208 urban, 697 rural)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

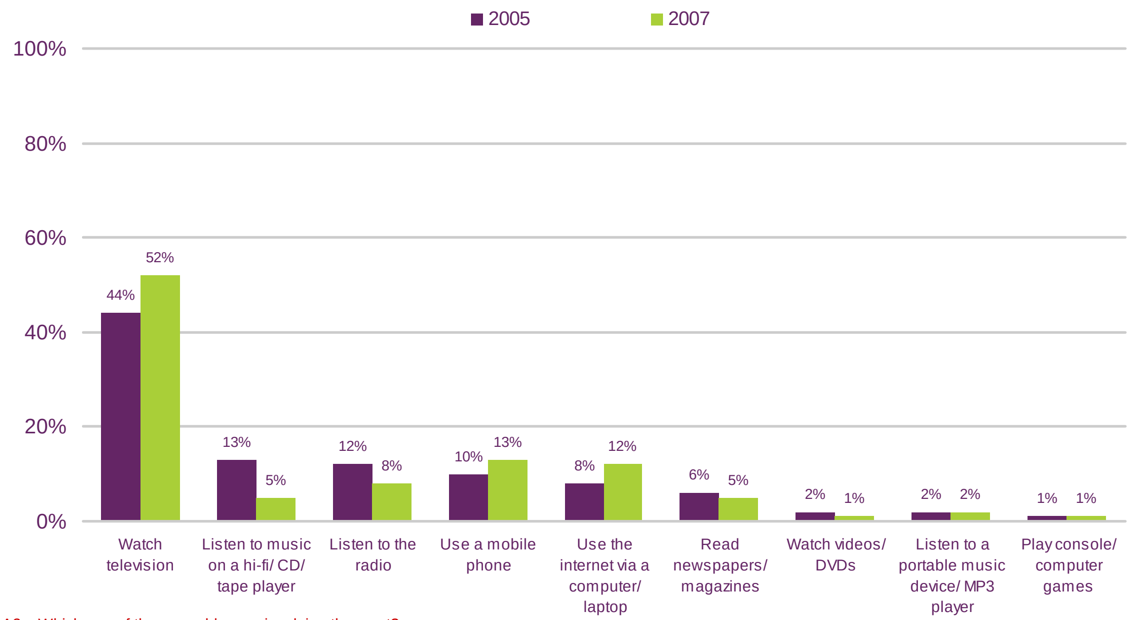
Adults with a visual, hearing or mobility impairment mention a narrower range of media used regularly, compared to all UK adults. With the exception of television and reading newspapers / magazines (among mobility-impaired), each of the other media are less likely to be mentioned by those with a visual, hearing or mobility impairment.

Those with children in the household use a broader range of media regularly, compared to those with no children at home.

While the breadth of media is similar for those in urban and in rural areas, those in urban areas are more likely to regularly watch videos / DVDs, while those in rural areas are more likely to listen to radio.

Having established the regular media activities for adults, we then asked which one of these they would miss doing the most. Figure 114 compares responses from the 2005 and 2007 Media Literacy Audit surveys.

Figure 114: Media activity adults would miss the most, 2005 and 2007



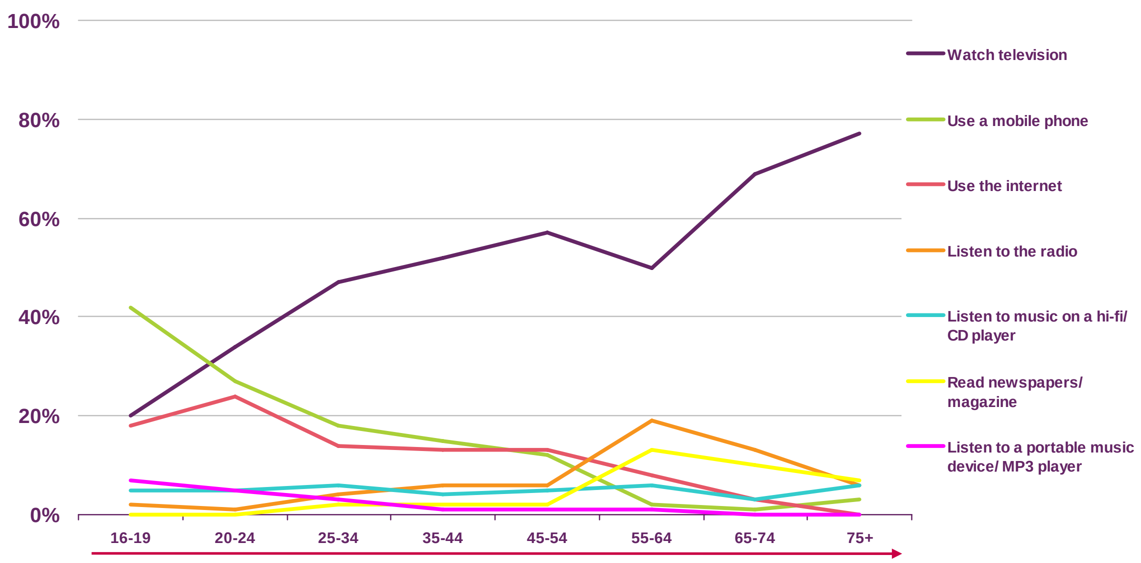
A2 – Which one of these would you miss doing the most?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Watching television remains the most common media activity for UK adults, with half saying they would miss this the most.

Compared with 2005, people are more likely to say that they would miss watching television, using a mobile phone, and using the internet. Two media are named by fewer adults as their most missed activity, compared to 2005: listening to music on a hi-fi/ CD/ tape player and listening to radio.

Figure 115 shows responses from the 2007 Media Literacy Audit from adults in each age group.

Figure 115: Media activity adults would miss the most, by age



A2 – Which one of these would you miss doing the most?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+) Shows responses from 5% or more of all adults aged 16+.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While half (52%) of all adults say that watching television is the activity they would miss the most, this is more common among those aged 65 and over, and less common among those aged under 25.

The youngest adults (aged 16-19) are the only group where television is not the most mentioned medium; the mobile phone is.

Figure 116 shows the most missed media activity for males and females and those in each of the socio-economic groups.

Figure 116: Media activity would miss the most, by gender and socio-economic group

A2 – Which one of these would you miss doing the most?
Base: All adults aged 16+ (2905 aged 16+, 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While both males and females are more likely to mention television than the other media, males are more likely to mention the internet and newspapers/magazines, and females are more likely to mention watching television as their most missed media activity.

Across the socio-economic groups, adults in AB households are more likely to say they would miss the internet and newspapers/ magazines the most. Those in C1 households are more likely to say they would miss using a mobile phone, while those in C2 and DE households are more likely to say they would miss watching television the most.

Figure 117 shows the most missed media activity for other key demographic groups where responses differ significantly.

Figure 117: Media activity would miss the most, by key demographic groups

A2 – Which one of these would you miss doing the most?
Base: All adults aged 16+ (2905 aged 16+, 131 visual impairment, 116 hearing impairment, 230 mobility impairment, 1481 children in household, 1306 no children in household, 2208 urban, 697 rural)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Adults with a visual or mobility impairment are more likely to say they would miss watching television the most. Those with a hearing impairment do not differ from adults as a whole in their responses to this question.

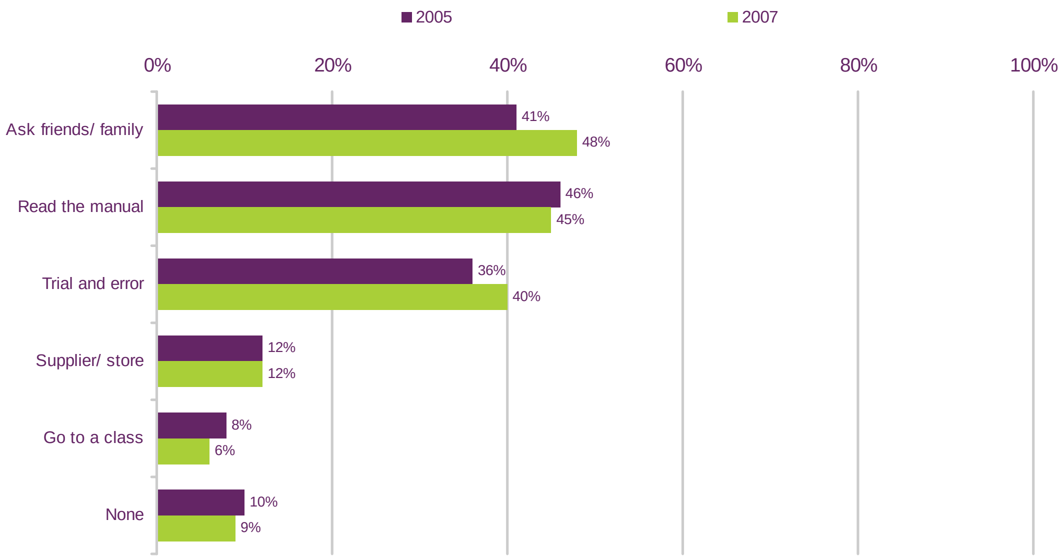
Those with children in the household are more likely to miss the internet the most, while those with no children in the household are more likely to miss listening to radio and reading newspapers/ magazines. These responses are likely to be age-related.

Those in rural areas are more likely to mention listening to radio, compared to those in urban areas.

7.3 Learning about digital technology

All adults were prompted with a list of five options and were asked to say how they prefer to learn about using services and products such as digital television and radio, the internet and mobile phones. Figure 118 compares responses to this question from the 2005 and 2007 Media Literacy Audit surveys.

Figure 118: Preference for learning about digital technology, 2005 and 2007



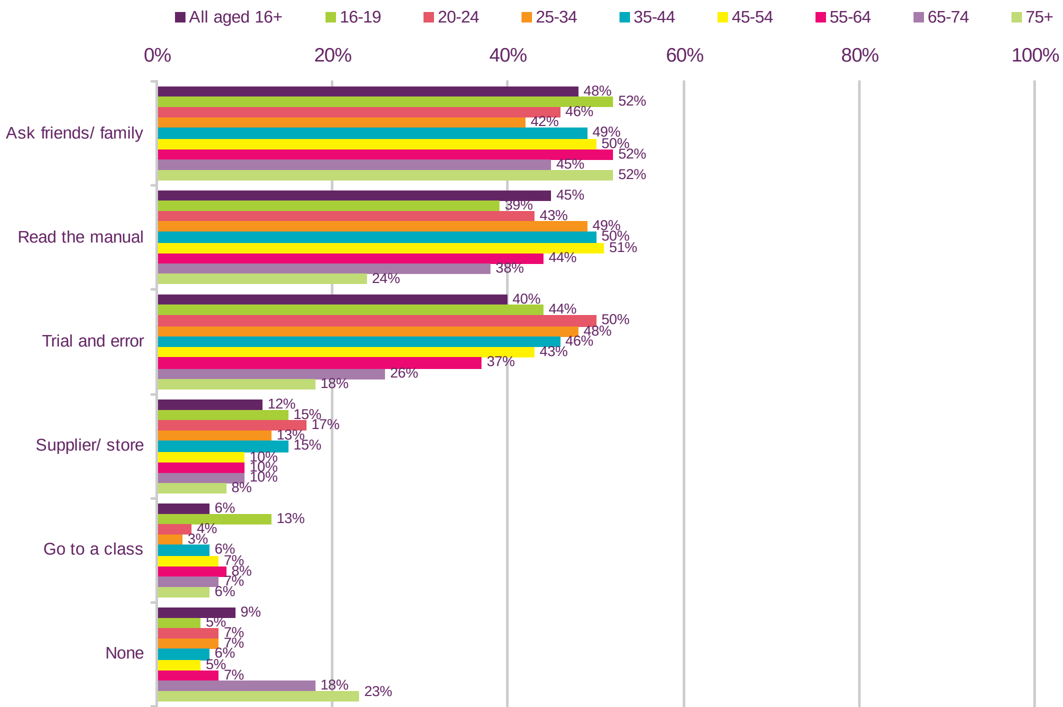
Z8 – We have discussed digital television and radio, the internet and mobile phones. Please tell me which of these are ways you prefer to learn about using such services?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

As in 2005, there are three main preferred methods of learning about digital technology from the five options available: *learning through asking friends/ family*, *reading the manual/ following instructions/ going online*, and *through trial and error/ experimenting on their own*.

Since 2005 a higher proportion of UK adults state a preference for *learning through asking friends/ family* and *through trial and error/ experimenting on their own*. It is still the case that relatively few adults state a preference for formal learning through going to a class / learning in a group.

Figure 119 compares learning preferences from the 2007 Media Literacy Audit, by age.

Figure 119: Preference for learning about digital technology, by age



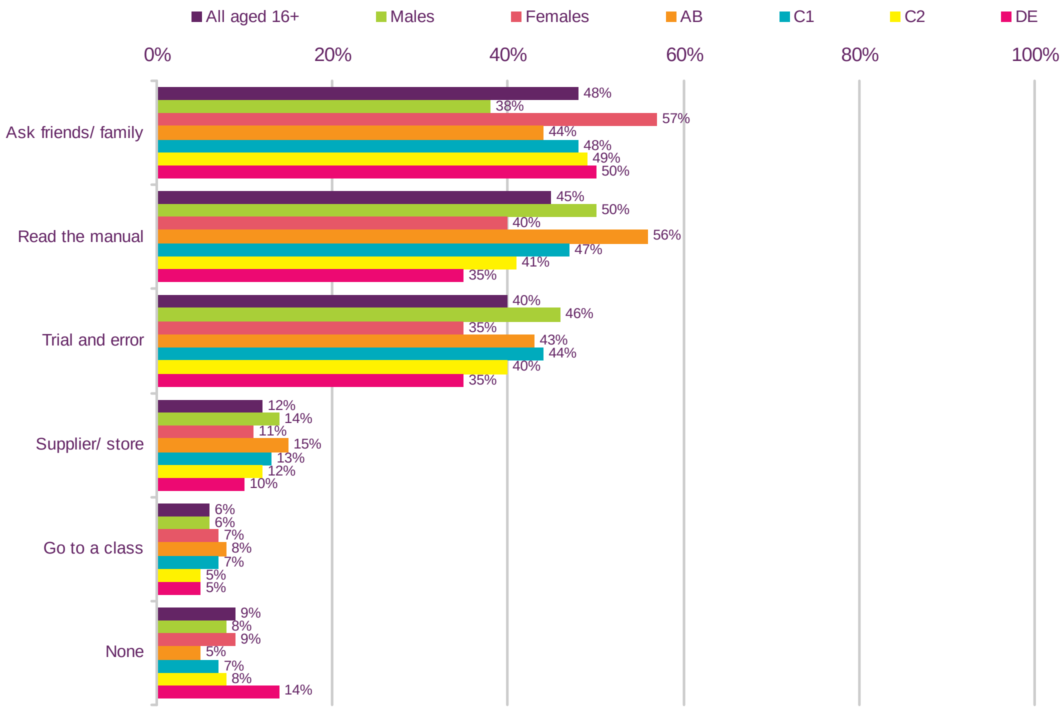
Z8 – We have discussed digital television and radio, the internet and mobile phones. Please tell me which of these are ways you prefer to learn about using such services?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Those aged from 25 to 54 are more likely to state a preference for learning *through reading the manual/ following instructions/ going online*, and those aged from 25 to 44 are more likely than adults as a whole to state a preference for learning through trial and error/ experimenting on their own.

The youngest adults (aged 16-19) are more likely to state a preference for learning in a class or group, with those aged 65 and over more likely to say they have no interest in learning about digital technology.

Figure 120 shows stated preferences for learning about digital technology among key demographic groups where responses differ significantly.

Figure 120: Preference for learning about digital technology, by key demographic groups



Z8 – We have discussed digital television and radio, the internet and mobile phones. Please tell me which of these are ways you prefer to learn about using such services?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

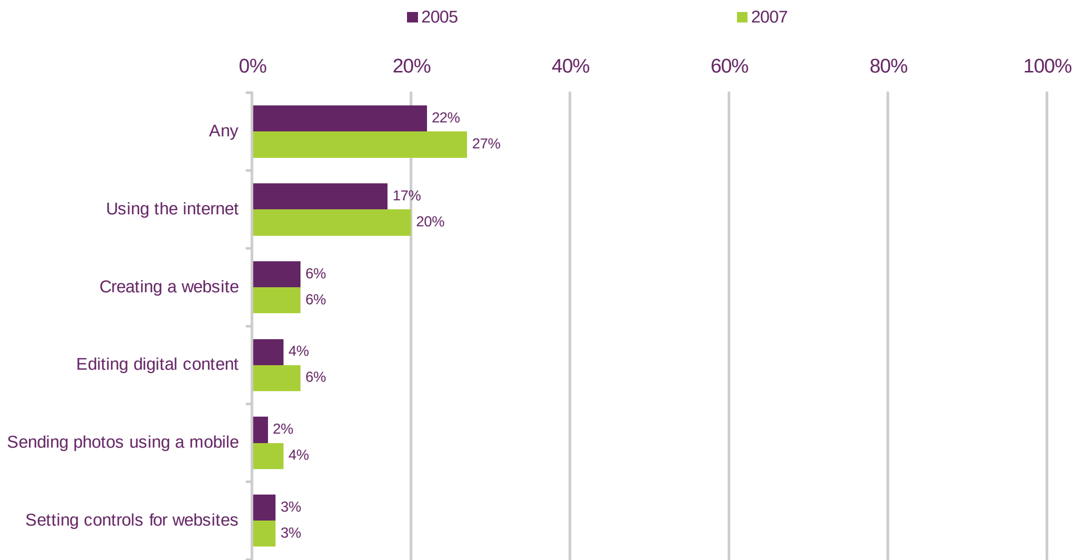
Females are more likely to state a preference for *learning through friends/ family*, while males are more likely to state a preference for *learning through reading the manual/ following instructions/ going online*, *through trial and error/ experimenting on their own* or *from a supplier/ store*.

Those in AB socio-economic group households are more likely to prefer learning *through reading the manual/ following instructions/ going online*, while those in DE households are more likely to say they have no interest in learning about digital technology.

7.4 Experience of learning about digital technology

Adults were prompted with a list of aspects of digital technology and were asked to say which, if any, they have learned more about through classes or any other type of training. Figure 121 compares responses from the 2005 and 2007 Media Literacy Audit surveys.

Figure 121: Experience of learning about digital technology, 2005 and 2007

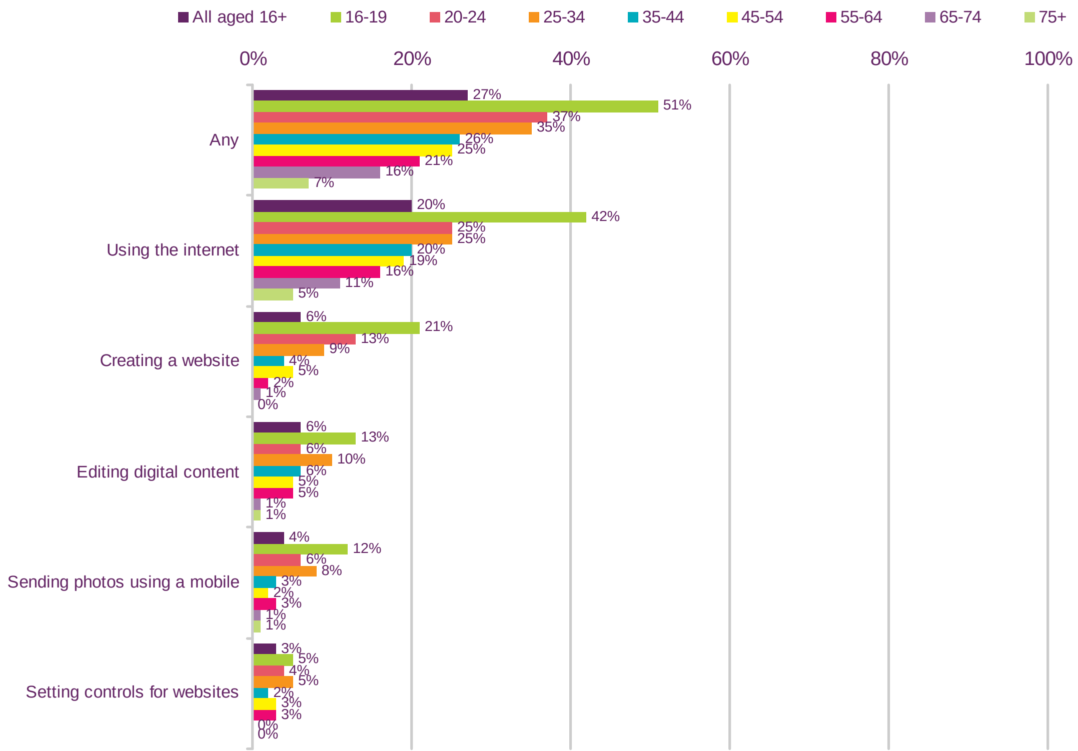


Z10 – And which, if any, of these would you be interested in learning more about?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+).
Shows responses from 3% or more of all adults.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Experience of learning about digital technology has increased across all UK adults since 2005, specifically learning about using the internet, editing digital content and sending photos using a mobile. Much of the overall level of experience of learning relates to using the internet.

Figure 122 shows responses from the 2007 Media Literacy Audit by age group.

Figure 122: Experience of learning about digital technology, by age



Z9 – Thinking about the types of things you might learn about TV, the internet, mobile phones and so on… Can you tell me which, if any, of these have you learned more about through classes or any other type of training?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+). Shows responses from 3% or more of all adults.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While one in four adults have experience of learning about digital technology through classes or another type of training, this is more common among adults aged from 16 to 34 (particularly 16-19s), and less common among those aged 55 and over.

Table 9 compares experience of learning about digital technology across other key demographic groups where responses differ significantly. Responses do not vary between males and females, and so do not feature in Table 9.

Table 9: Experience of learning about digital technology, by key demographic groups

	Any	Using the internet	Creating a website	Editing digital content	Sending photos using a mobile phone	Setting controls/ filters for websites
	%	%	%	%	%	%
All adults aged 16+ (2905)	27	20	6	6	4	3
AB (552)	34	26	8	7	4	2
C1 (836)	32	25	8	7	5	4
C2 (605)	23	17	5	5	5	3
DE (897)	17	12	3	3	4	2
Working (1437)	31	23	7	7	5	3
Not working (1433)	22	17	4	4	4	2
Urban (2208)	27	21	6	6	4	3
Rural (697)	24	15	5	6	5	3
Visual impairment (131)	16	10	2	3	1	1
Hearing impairment (116)	20	17	3	5	3	5
Mobility impairment (230)	9	8	1	1	1	1

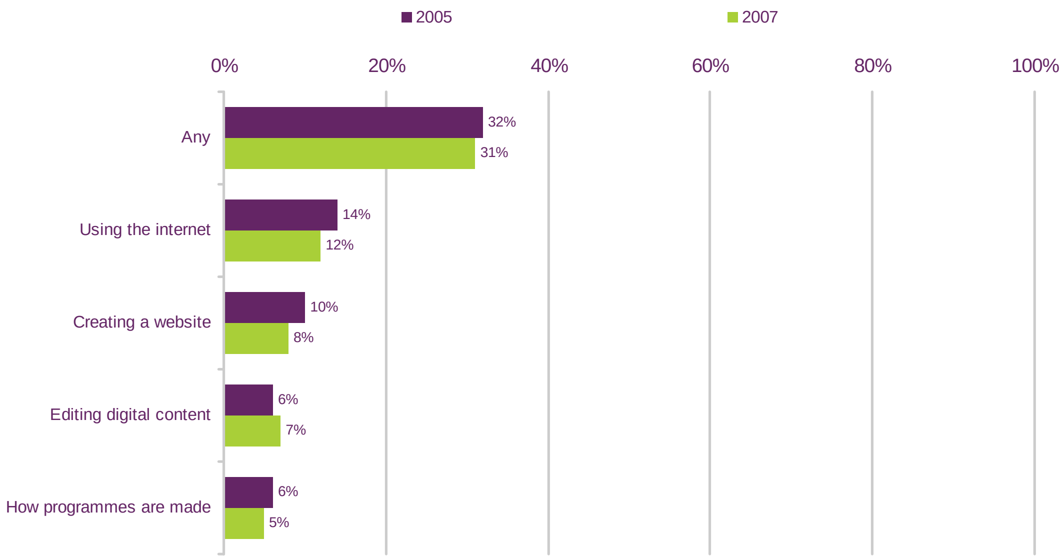
Z9 – Thinking about the types of things you might learn about television, the internet, mobile phones and so on… Can you tell me which, if any, of these have you learned more about through classes or any other type of training?
Base: All adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Adults in AB and C1 socio-economic group households and those who are working are more likely to have experience of learning about digital technology through classes or any other types of training. Conversely those in C2 and DE socio-economic group households, those who are not working and those with a visual or mobility impairment are less likely to have this experience. Those with a hearing impairment do not differ from adults as a whole in this respect.

7.5 Interest in learning about digital technology

Adults were then asked which, if any, of the internet tasks mentioned above they would be interested in learning more about. Figure 123 compares responses from the 2005 and 2007 Media Literacy Audit surveys.

Figure 123: Interest in learning about digital technology, comparing 2005 and 2007

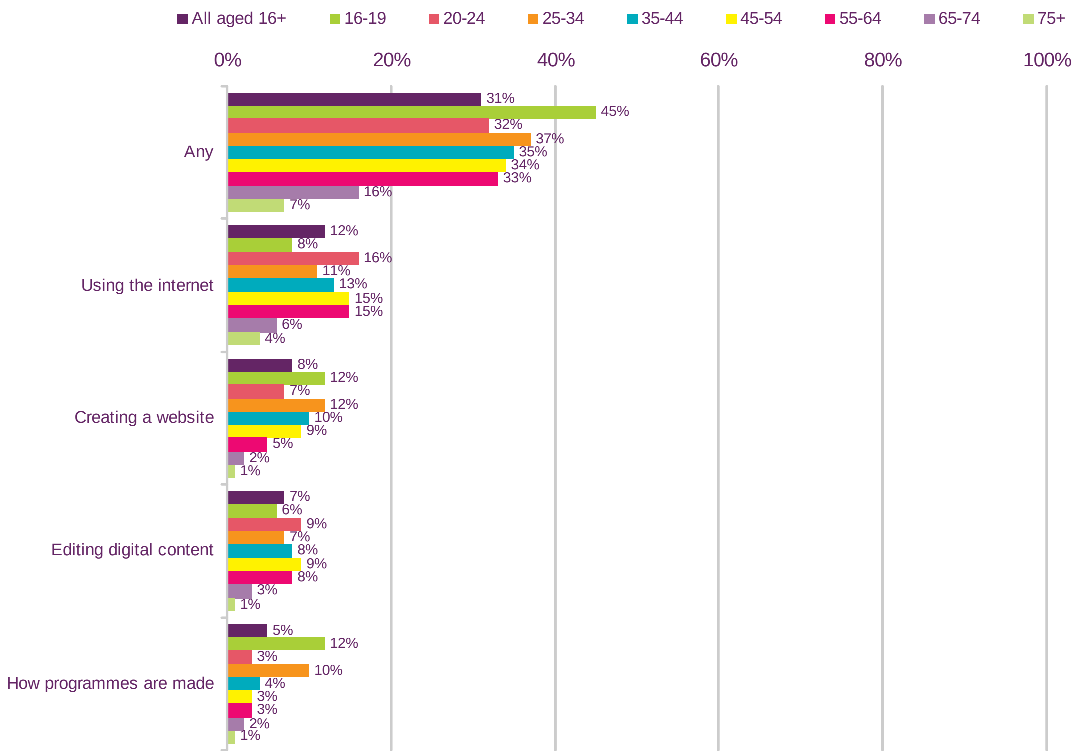


Z10 – And which, if any, of these would you be interested in learning more about?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007). Shows responses from 5% or more of all adults.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Interest in learning more about digital technology has not changed at an overall level across all UK adults since 2005. As with experience of learning, much of the overall level of interest in learning more relates to using the internet.

Figure 124 shows responses from the 2007 Media Literacy Audit by age group.

Figure 124: Interest in learning about digital technology, by age



Z10 – And which, if any, of these would you be interested in learning more about?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+).
Shows responses from 5% or more of all adults.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While three in ten adults is interested in learning more about digital technology, this is more common among those aged 16-19 and those aged 25-34, and less common among those aged 65 and over.

Table 10 compares interest in learning about digital technology across other key demographic groups where responses differ significantly. Responses do not vary between males and females, and so do not feature in Table 10.

Table 10: Interest in learning about digital technology, by key demographic groups

	Any	Using the internet	Creating a website	Editing digital content	How programmes are made
	%	%	%	%	%
All adults aged 16+ (2905)	27	20	6	6	4
AB (552)	39	10	9	11	7
C1 (836)	34	11	9	7	6
C2 (605)	29	13	7	5	4
DE (897)	23	12	6	4	3
Working (1437)	35	12	9	8	6
Not working (1433)	27	11	6	6	3
Visual impairment (131)	23	13	3	5	4
Hearing impairment (116)	19	13	2	3	2
Mobility impairment (230)	18	11	2	4	2

Z10 – And which, if any, of these would you be interested in learning more about?
Base: All adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Adults in AB socio-economic group households and those who are working are more likely to be interested in learning more about digital technology. Those in DE socio-economic group households and those with a visual, hearing or mobility impairment are less likely than adults as a whole to be interested.