Children and parents: media use and attitudes report

Contents

Section 1

Executive summary

The report is designed to give an accessible overview of media use, attitudes and understanding among children and young people aged 5-15. It also documents the views of parents/carers about their child's media use, and the rules, tools and other ways that parents manage such use.

The document is based principally on findings from Ofcom's media literacy tracker conducted in spring 2011. Where possible, within the sample of children aged 5-15 and their parents, demographic analysis is conducted by age of the child interviewed, by gender and by household socio-economic group.

Analysis of children's television viewing habits, sourced from BARB; parents' opinions and concerns about pre-watershed television programming, sourced from a quantitative survey conducted in July 2011[1]; and relevant findings from Ofcom's Media Tracker 2010 survey are also included in the report.

By drawing together a range of research sources, the report provides a single reference source for understanding parents' and children's media use and attitudes.

Children's media take-up and affinity

There has been continued growth in household access to the internet, and ownership of a DVR. Children aged 12-15 are now more likely to say they would miss their mobile phone or the internet.

- Nine in ten (91%) children aged 5-15 live in a household with internet access via a PC/laptop, up from 87% in 2010.
- This increase is driven by a rise in home internet access among 12-15s (95% vs. 89% in 2010) and among 8-11s (90% vs. 86% in 2010).
- Digital Video Recorder (DVR) ownership has also continued to increase - 66% of children now have one at home, compared to 52% in 2010.
- PC/laptop internet use at home ranges from 65% of 5-7s, 85% of 8-11s to 93% of 12-15s; an increase for this oldest group since 2010 (88%).
- Forty three per cent of 12-15s have PC/laptop internet access in their bedroom compared to 14% of 8-11s and one in twenty (4%) of 5-7s.
- Thirty per cent of 8-11s (up from 22% in 2010) and forty per cent of 12-15s (up from 32%) now have digital TV in their bedroom. Among 5-7s there has been no change at 15%.
- While television continues to be the medium that children aged 5-15 say they would miss the most, it has declined since 2010 among 8-11s (39% vs. 45%) and 12-15s (18% vs. 24%). Children aged 12-15 are now more likely to say they would miss their mobile phone (28%) or the internet (25%) than television.

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[1] This was originally published alongside Ofcom's guidance on the TV watershed, in September 2011.

Use of media

While there has been an increase in the take up and use of the internet and of smartphones (among 12-15s), television remains the most consumed medium across each age group.

- *C*hildren in each age group spend most time watching TV. For 12-15s the next most-used medium is the internet, while for 5-7s and 8-11s it is gaming.

- According to BARB data, children aged 4-15 watched an average of 17 hours and 34 minutes of television per week in 2010, up from 15 hours and 37 minutes in 2007.

- Almost one third (31%) of 5-15s watch TV via an online catch-up service on their PC/laptop, such as the BBC iPlayer or ITV Player.

- Use of a mobile phone to go online at home has increased since 2010 among children aged 12-15 (29% vs. 23%) and 8-11 (9% vs. 4%). This is driven by an increase in smartphone ownership since 2010 among 12-15s (41%[2] vs. 35%). Younger children are less likely to own a smartphone, accounting for 12% of 8-11s and 2% of 5-7s.

- One of the most popular activities among 12-15s with a smartphone is social networking, with half (50%) going on social networking sites at least once a week.

- In terms of internet use on a PC/laptop, 12-15s are most likely to use it for schoolwork or homework or social networking, 8-11s are most likely to use it at least weekly for schoolwork or homework and, 5-7s are most likely to use it for playing games.

- Since 2010, children are less likely to use the internet on their own (32% vs. 36%) and more likely to use it in the presence of an adult (59% vs. 55%).

- Social networking activity has not increased since 2010 - 3% of 5-7s, 28% of 8-11s and 75% of 12-15s have an active profile. One third (34%) of 8-12s have a profile on sites that require users to register as being aged 13 or over, unchanged versus 2010.

    - Using social networking sites to communicate with people not directly known to the child is less likely than in 2010, for both 8-11s (12% vs.22%) and 12-15s (24% vs. 32%).

    - While most 8-15s with a social networking site profile say their profile can only be seen by their friends and no-one else, a substantial minority of both 8-11s (17%) and 12-15s (28%) have a profile which is either open to anyone, or open to friends of friends.

- Playing computer and video games on a daily basis is popular among children in each age group (58% of 5-7s, 68% of 8-11s and 59% of 12-15s). Among 8-11s there has been an increase from 59% in 2010.

Knowledge and understanding of media among 8-15s

There has been little change in the levels of knowledge and understanding about content online.

- 8-11s and 12-15s differentiate between the truthfulness of different types of television content and also between different types of online content.

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[2] Research published in Ofcom's 2011 Communications Market Report found that 47% of 12-15s have a smartphone. Please note that there is a difference in methodologies between the two surveys - online panel versus face-to-face - and the difference is not statistically significant. It is also important to note that in the Communications Market Report, 67% of smartphone owners said they had purchased it in the last six months which points towards a dynamic market. The Communications Market Report is available from Ofcom's website: http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/

- Close to half (45%) of 12-15s who ever use search engines make some type of critical judgement about search engine results, thinking that some of the sites returned will be truthful and some won't be. One in three (33%) believe that information on a website listed by a search engine must be truthful. Both of these measures are unchanged since 2010.

- Around seven in ten (68%) 8-11 year old internet users say that most weeks they only visit websites they have visited before. This compares to around half (51%) of 12-15s.

- Since 2010, internet users aged 12-15s are more likely to make certain checks when visiting websites that are new to them, but the overall extent of making any checks is unchanged, at 63%.

- When asked about their attitudes towards sharing personal information online, the majority of 12-15 year old internet users would either want nobody or only their friends to see each type of information asked about.

- However, there is a clear contrast in the types of information they would be happy for people to see online. For example, they are more inclined to share photos of being out with friends (25% say they are happy to share with friends of friends or people they don't know) than they are to share their home address (7%).

Parents' and children's concerns and attitudes

Parents' concerns

Parental concerns about the content on the different media that their child has access to are relatively low. Parents express high levels of trust in their child to use the internet safely.

- Parents of 5-15s are most likely to be concerned about the television content their child watches (31%), compared to internet content (23%), mobile phones (16%), games (19%) or radio (5%). Levels of concern at the overall level for each medium are unchanged since 2010.

- Ofcom's pre-watershed research (see annex 1) showed that one third (33%) of parents expressed some level of concern regarding the programming their children had seen before 9pm, with 9% stating they were "very concerned" and 24% "fairly concerned".

- The top spontaneous (unprompted) concerns among all parents surveyed were: violence (20%), sexually explicit content (17%) and offensive language (17%).[3]

- Parents have relatively low levels of concern about different aspects of their child's internet use; with fewer than one third saying they are very or fairly concerned about their child giving out personal details to inappropriate people (28%), being bullied online/ cyberbullying (27%), who their child is in contact with online (24%), the content on the websites their child visits (23%), or any illegal downloading (14%). Parents of 12-15s have lower levels of concerns across several of these aspects than they did in 2010.

- Similarly, across mobile phones and gaming, parents express relatively low levels of concern about different aspects of their child's use of each device. For example, 17% of parents of 8-11s say they are concerned about their child being bullied via their mobile, and 22% of parents of a 12-15 year old. 14% of parents of 8-11s are concerned about who their child is playing games with, compared to 17% of parents of a 12-15 year old.

- Most parents of 5-15s trust their child to use the internet safely (81%), feel that the benefits of the internet outweigh the risks (65%), and say that their child has been taught

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[3] When all mentions of anything sexual were aggregated, the total figure for all parents concerned about any sexual content was 21%. This aggregated figure is made up of the number of parents that gave at least one of the following responses: sexually explicit content, overtly sexual performances, nakedness, and generally unsuitable content of a sexual nature.

at school how to use the internet safely (79%). Around half of parents (49%) say their child knows more about the internet than they do.

Children's dislikes and experiences

Dislikes about inappropriate content (defined as that which makes them feel sad, frightened or embarrassed, or which they feel is too old for them) range widely between different media, but remain at relatively low levels. The vast majority of children say they feel they know how to stay safe online.

- Close to one in three (31%) of 8-11s say that they don't like seeing things on television that either make them feel sad, frightened and embarrassed, or that are too old for them. This has increased from 23% in 2010. There is no change among 12-15s, with 19% saying this about television.

- Among 8-11s, 23% say they don't like seeing things online that either make them feel sad, frightened and embarrassed, or that are too old for them. This compares to 15% of 12-15s.

- Children aged 8-11 and 12-15 with a social networking profile were asked about specific dislikes relating to social networking. At around one third of each age group, the most common responses were that they didn't like the possibility that people sometimes get bullied on these sites or that strangers may find out information about them.

- When asked about their own particular *experiences* online, 13% of 12-15s said that they had seen something online in the past year that is worrying, nasty or offensive. This compares to 8% of 8-11s.

- Experience of being bullied online in the past year accounts for one in twenty 8-11s (5%) and 7% of 12-15s[4]. Whereas 10% of 8-11s and 25% of 12-15s say that they know someone that this has happened to.[5]

- 3% of 8-11s and 6% of 12-15s say that they have personal experience of being bullied through a mobile phone in the past year.[6] One in ten 8-11s and one in four 12-15s say they know someone this has happened to.[7]

- Children aged 12-15 were also asked about a range of different negative types of online or mobile phone activity. The most likely personal experience is gossip being spread (13%) which rises to 36% of 12-15s saying they know someone this has happened to. Around 20% of 12-15s say that they have personally experienced at least one of the negative experiences asked about in the last 12 months[8].

- One in seven internet users aged 12-15 (14%) said they had undertaken one of four types of risky online activity in the past year; most commonly taking contact details for someone they have only met online (11%).

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[4] For further research on cyberbullying see Beatbullying *Virtual Violence: Protecting Children from Cyberbullying* http://www.beatbullying.org/dox/resources/reports.html and the EU Kids Online project http://www2.lse.ac.uk/media@lse/research/EUKidsOnline/EU%20Kids%20II%20(2009-11)/EUKidsOnlineIIReports/Final%20report.pdf.
[5] Girls aged 12-15 are more likely than boys to say they have been bullied online in the past year (10% vs. 5%) and to say they know someone this has happened to (30% vs. 19%).
[6] Girls aged 12-15 are more likely than boys of this age to say this has happened to them (10% vs. 2%).
[7] This is more likely among girls aged 12-15 compared to boys of this age (30% vs. 16%).
[8] The survey asked 12-15s whether they had experience any of the following in the last 12 months - 'gossip spread about someone online or through a text message', 'embarrassing pictures posted of someone online or sent to other people against their wishes', 'another person pretending to be them online', 'another person using their password', 'someone being picked on by other players in online games', 'seeing something of a sexual nature online or on a mobile phone', and 'being cheated out of money online'.

- The vast majority of children aged 8-15 say they are confident that they know how to stay safe online (88%) and that they are confident internet users (97%).

Parents' rules and controls

Most parents have rules in place for each medium. By comparison, parents are less likely to use 'technical' parental control mechanisms, such as internet filers or PIN controls in place on each medium.

- Most parents have rules in place for their child's use of television, internet, mobile phones and gaming. Rules are more likely to be in place for 5-7s and 8-11s than for 12-15s for television, internet and gaming, and are more likely to be in place for 8-11s than for 12-15s for mobile phones.

- Households with a multichannel television service (95% of all 5-15s) are now more likely to have access controls through a PIN or password since 2010 (44% vs. 36%).

- Among parents whose child has a mobile phone that can be used to go online, one in three (31%) have limited access to the internet to exclude websites aimed at those aged 18 or over.

- Parental controls are unlikely to be in place for either handheld games players (12%) or games consoles connected to a television (15%).

- There has been no change since 2010 in the incidence of internet controls or filtering software being in place; accounting for four in ten (39%) households where a child aged 5-15 uses the internet at home. However, since 2008 there has been a decline in the incidence of controls/filters.

- Fewer than half of those whose child uses each type of service have safe settings in place for search engine websites (47%), the YouTube website (28%) or UK TV broadcasters' websites (18%).

- Across all these types of 'technical' parental controls, six in ten (59%) parents of 5-15s say they have at least one of these in place.

- Over half (54%) of parents of 5-15s say they have rules about the internet related to active supervision, with parents of 5-7s (63%) and 8-11s (61%) being more likely to do so than parents of 12-15s (42%). This has increased since 2010.

- Four in five parents of 5-15s say they have spoken with their child about staying safe online (83%) and a similar proportion say they feel they know enough about how to help their child stay safe online (82%). Nine in ten children aged 8-15 say they have been given information about staying safe online.

- One in four parents (27%) of children who use the internet at home use a combination of any of the 'technical' parental controls, *and* have rules relating to supervising their child's internet use *and* say they have talked to their child about staying safe online. One in twenty (5%) do none of these things, and a further 15% have only talked to their child about staying safe.

- While there appears to be no clear relationship between the use of online controls and children's attitudes and online behaviour, our research suggests a relationship between the use of supervision rules, the ways that a child accesses the internet at home and their activities online.

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Section 2

Introduction

Background

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

Our media literacy research informs three of Ofcom's strategic priorities: to provide appropriate assurance to audiences on standards; to help communications markets work for consumers; and to contribute and implement public policy as defined by Parliament.

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

Ofcom's definition of media literacy is:

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

This report is designed to give an accessible overview of media literacy among children and young people[9] aged 5-15 and their parents/carers[10], and is based on one wave of research, conducted in spring 2011. Where possible, within the sample of children aged 5-15 and their parents, demographic analysis is conducted by age (of the child interviewed), by gender and by household socio-economic group.

The key objectives of this research are:

- to provide a rich picture of the different elements of media literacy across the key platforms of the internet, television, radio, games, and mobile phones; and

- to identify emerging issues and skills gaps that help to target stakeholders' resources for the promotion of media literacy.

The report also includes analysis of children's television viewing habits, sourced from BARB, parents' opinions and concerns about pre-watershed television programming, sourced from a quantitative survey conducted in July 2011[11], and relevant findings from Ofcom's Media Tracker 2010 survey.

By drawing together a range of research sources, the report provides a single reference source for understanding parents' and children's media use and attitudes.

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[9] References to children in this report are used to refer to children and young people.

[10] References to parents in this report are used to refer to parents and carers.

[11] This was originally published alongside Ofcom's guidance on the TV watershed, in September 2011.

Research methodology and analysis

This report provides an update to the Children's Media Literacy Audits published in 2006, in 2008 and 2010[12]. It draws on the following surveys:

Media Literacy Tracker **with children and parents:** a quantitative tracking survey conducted in 2009, 2010 and 2011.1,717 in-home interviews with parents and children aged 5-15 were conducted from March to April 2011, with 2,071 interviews conducted with parents and children aged 5-15 in April to May 2010 and from September to October 2010. In 2009, 2,131 in-home interviews with children aged 5-15 and their parents/carers were conducted from April to May and from September to October.

Young People's Media Usage **survey:** a quantitative tracking survey, conducted in 2007 and 2008, which was devised to provide Ofcom with continued understanding of children's behaviour in the UK communications markets. 3,696 interviews with parents and children aged 5-15 were conducted during 2007, with 2,066 interviews with parents and children aged 5-15 conducted during 2008. All interviewing was done in the home.

Media Literacy Audit: a quantitative survey that involved 1,536 in-home interviews with parents and children aged 8-15 from June to August 2005 and 2,068 in-home interviews among the same demographic from October to December 2007.

In some instances, we make comparisons between this research, the Media Literacy Tracker in 2009 and either the *Young People's Media Usage* survey, conducted in 2007 and 2008, or the *Media Literacy Audits* conducted in 2005 and 2007.

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

Where possible, findings are shown for 5-15s as well as for the particular age groups (5-7, 8-11 and 12-15). However, some questions in earlier surveys, as well as particular questions in the current survey, were not asked of all age groups of children.

The report also includes results from the following research studies and analysis:

BARB analysis: analysis of children's television viewing habits sourced from BARB, the UK's television measurement panel. Findings are provided for children aged 4-15 as well as the subgroups aged 4-9 and 10-15.

Ofcom's Media Tracker: results among parents of children aged 0-17 about their attitudes towards television in general. This provides useful context to the media literacy research, which focuses on parents' views about what their children watch. The results are drawn from Ofcom's 2010 Media Tracker survey, conducted in two waves, in spring and autumn 2010. In total 2,141 UK adults took part in the survey, which was conducted face-to-face in the home. 622 parents of children aged 0-17 were interviewed.

Omnibus survey on concerns about television among parents: results among parents or carers of children aged 0-17 about the level and nature of their concerns about the television programmes their children watch before 9pm. The survey asks detailed questions about parents' concerns about music video channels, and was conducted by Kantar, face-to-face in the home in July 2011. In total 1,054 parents or carers were interviewed.

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[12]www.ofcom.org.uk/medialiteracyresearch

Omnibus survey on concerns about television among teenagers: Ofcom commissioned questions in an online omnibus, among 768 teenagers aged 12 - 17, to ask them about the nature and level of their concerns about television programmes they watch before 9pm.

UKOM/Nielsen: data on most-accessed websites by children aged 5-15. The data is derived from UKOM/Nielsen's UK panel of households comprising 45,239 individuals (aged 2+), as of March 2011. The data is weighted to be representative of the UK's home internet population.

Children's take-up of media

This section looks at children's take-up of media devices. It documents the access children have via household devices, and the personal use that they make of such devices. It includes an examination of whether such media devices are in the child's bedroom.

As context, it also provides a snapshot of the affinity that children have for each medium.

Key findings

- Since 2010 children aged 5-15 are more likely to live in a household with access to the internet through a PC or laptop (91% vs. 87%) and with a DVR (66% vs. 52%). A laptop is the device most often used to go online at home.

- Use of a mobile phone to go online at home has increased among children aged 8-11 (9% vs. 4%) and 12-15 (29% vs. 23%). Around one in five children aged 8-11 (19%) and 12-15 (23%) go online at home using a games console/ player; unchanged since 2010.

- Smartphone ownership has increased since 2010 for 12-15s (41% vs. 35%), and accounts for 2% of 5-7s and 12% of 8-11s. Girls aged 8-11 and 12-15 are more likely than boys to own a smartphone.

- PC/laptop internet use at home ranges from 65% of 5-7s, 85% of 8-11s to 93% of 12-15s; an increase for this oldest group since 2010 (88%). As in 2010, around one in twelve (8%) of all 5-15s do not use the internet at all, in any location, with this varying considerably by age. Since 2010, children are less likely to use the internet on their own and more likely to use it in the presence of an adult.

- Most 8-11s (61%) and 12-15s (74%) have a television in their bedroom, but this is less likely among 5-7s (45%). Compared to 2010, 8-11s (30%) and 12-15s (40%) are now more likely to have digital television in their bedrooms.

- One in four (26%) children aged 5-15 use on-demand TV services.

- While television continues to be the medium that children aged 5-15 say they would miss the most, television is less likely since 2010 to be the preferred medium among 8-11s (39% vs. 45%) and 12-15s (18% vs. 24%). Children aged 12-15 are now more likely to say they would miss their mobile phone (28%) or the internet (25%) than television.

- Most children in each age group use any type of gaming device; most commonly games consoles connected to a TV or handheld games players. One quarter of boys who play games online do so against people that are not known to them.

Household access to media devices

Home internet access has increased for children aged 5-15

Households with children aged 5-15 have high levels of access to digital television, internet, games consoles[13] and radio.

Nearly all children (95%) live in a household with a digital television service.

Nine in ten children (91%) live in a household with access to the internet through a PC or laptop. Access has increased since 2010 (from 87%).This has been driven by an increase among children aged 8-11 (90% vs. 86%) and 12-15 (95% vs. 89%),

Nine in ten children (91%) live in a household with a fixed or portable games console. Boys aged 5-15 are more likely than girls to live in households with a games console, and this is evident among 8-11s (97% boys vs. 91% girls) and 12-15s (96% boys vs. 89% girls).

Since 2010, take-up of digital television has increased only for those households with children in socio-economic group C2 (98% vs. 95% in 2010).

Home internet access has increased for children in C1 households (96% vs. 92%) and in DE households (80% vs. 74%) since 2010, although home internet access for children in DE households continues to be lower than the levels across all other socio-economic groups. Internet access at home in AB and C1 households is now close to universal (98% and 96% respectively)

Figure 1: Access to key platforms in the home, by age and socio-economic group: 2007, 2009, 2010 and 2011
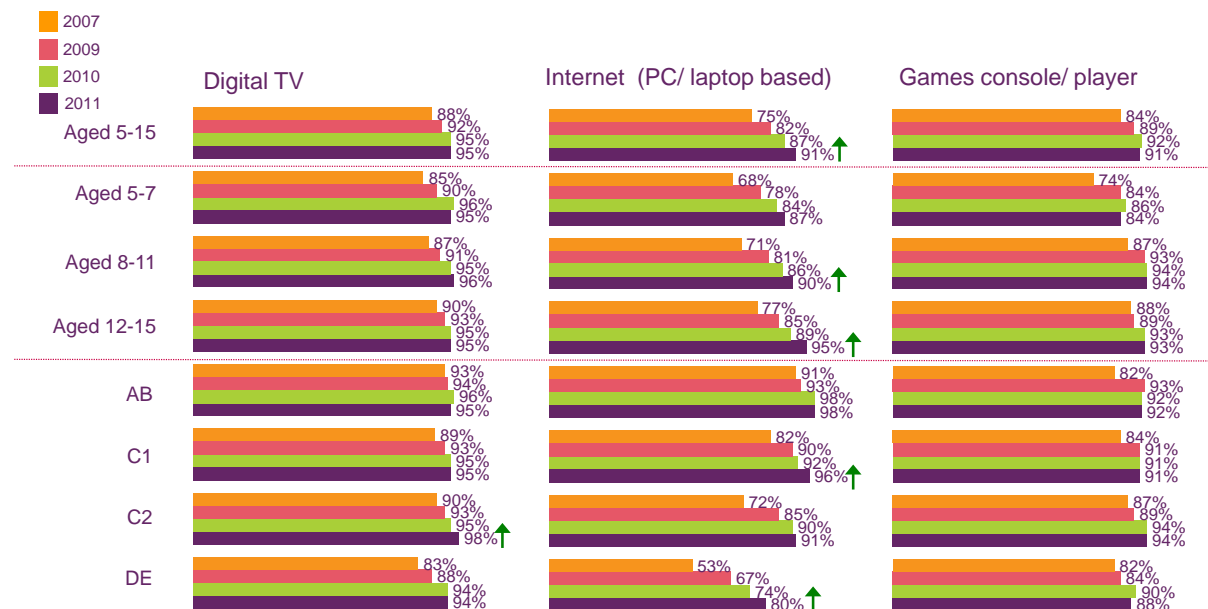
QP3A/B/G/H – I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use (prompted responses, single coded)
Base: Parents of children aged 5-15 (3696 aged 5-15 in 2007, 2131 aged 5-15 in 2009, 2071 aged 5-15 in 2010, 1717 aged 5-15 in 2011, 985 aged 5-7 in 2007, 576 aged 5-7 in 2009, 558 aged 5-7 in 2010, 573 aged 5-7 in 2011, 1354 aged 8-11 in 2007, 774 aged 8-11 in 2009, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 1357 aged 12-15 in 2007, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011, 697 AB in 2007, 374 AB in 2009, 426 AB in 2010, 386 AB in 2011, 949 C1 in 2007, 507 C1 in 2009, 576 C1 in 2010, 493 C1 in 2011 844 C2 in 2007, 472 C2 in 2009, 407 C2 in 2010,332 C2 in 2011, 1147 DE in 2007, 751 DE in 2009, 661 DE in 2010, 506 DE in 2011) - significance testing shows any differences between 2010 and 2011.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

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[13] Either those that are connected to a television or handheld / portable games players.

Figure 2 below shows results for digital video recorder (DVR) and radio ownership in the home.

Two in three children (66%) now have a DVR[14] at home. Take-up has increased across all three age groups since 2010(65% in vs. 53% in 2010 for 5-7s, 65% vs. 50% for 8-11s and 68% vs. 52% for 12-15s).

This increase in take-up of DVRs among households with children aged 5-15 is also evident across all four socio-economic groups, with the greatest percentage point increase among C2 households (76% vs. 53% in 2010). Children in DE households, however, continue to be less likely to have access to a DVR, compared to all children aged 5-15 (52% vs. 66%).

More than four in five (84%) children have access to a radio set (either DAB or AM/FM) within the home. Since 2010 access has remained the same for 8-11s and 12-15s, with a decrease for 5-7s (81% vs. 86%).

Figure 2: Access to key platforms in the home, by age and socio-economic group: 2007, 2009, 2010 and 2011

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[14] In 2011 the question used to establish household access to a digital video recorder was amended to reflect a shorter definition of DVR functionality. The question was also streamlined to reflect the way in which access/ use/ ownership of all key media in the study is established and, as such, was moved forward in the questionnaire.

Mobile phone ownership

Two in five children aged 12-15 now have a smartphone, with ownership higher among girls

Since 2010, parents of children with their own mobile phone have been asked whether their child's mobile phone is a smartphone[15].

Figure 3 shows that half of all children aged 5-15 have a mobile phone (52%) and one in five (20%) parents of children aged 5-15 say their child has a smartphone. The likelihood of owning a smartphone increases with the age of the child, with just 2% of 5-7s, around one in ten 8-11s (12%) and four in ten 12-15s (41%)[16] owning one.

Compared to 2010, the overall incidence of smartphone ownership has not changed among all children aged 5-15. However, 12-15s are now more likely to own a smartphone (41% vs. 35% in 2010).

In 2011 overall ownership of any type of mobile phone does not differ by gender, but girls aged 8-11 and girls aged 12-15 are more likely than boys in each age group to own a smartphone. Close to half (46%) of girls aged 12-15 now own a smartphone; this represents a 10 percentage point increase compared to 2010 (46% vs. 36%).

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[15] The question established smartphone ownership in the following way: "You mentioned that your child has their own mobile phone. Is this a smartphone? A smartphone is a phone on which you can easily access emails, download files as well as view websites and generally surf the internet. Popular brands of smartphone include Blackberry, iPhone and HTC".

[16] Research published in Ofcom's 2011 Communications Market Report found that 47% of 12-15s have a smartphone. Please note that there is a difference in methodologies between the two surveys - online panel versus face-to-face - and the difference is not statistically significant. It is also important to note that in the Communications Market Report, 67% of smartphone owners said they had purchased it in the last six months which points towards a dynamic market. The Communications Market Report is available from Ofcom's website: http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/

Figure 3: Smartphone and mobile phone ownership, by age, gender and socio-economic group: 2011

QP3D/NQP3P - I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use (prompted responses, single coded)/ You mentioned that your child has their own mobile phone. Is this a Smartphone? A Smartphone is a phone on which you can easily access emails, download files as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and HTC (spontaneous responses, single coded) – asked at Wave 2 2010 only
Base: Parents of children aged 5-15 (1717 aged 5-15, 573 aged 5-7, 586 aged 8-11, 558 aged 12-15, 292 boys aged 8-11, 294 girls aged 8-11, 272 boys aged 12-15, 286 girls aged 12-15, 386 AB, 493 C1, 332 C2, 56 DE) - significance testing shows any differences by gender within age or by SEG compared to all aged 5-15 or compared to 2010
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Children's media use in the home

Eight in ten children use the internet at home, rising to more than nine in ten among 12-15s

Parents were asked about their child's use of the various media within the home (Figure 4).

Eight in ten of all children aged 5-15 (82%) use the internet at home through a PC or laptop. Two in three children aged 5-7 (65%), more than eight in ten 8-11s (85%) and more than nine in ten 12-15s (93%) use the internet at home. 12-15s are now more likely to do so than in 2010 (93% vs. 88%).

Children's use of a mobile phone includes circumstances in which the child may be using a mobile phone that belongs to someone else in the household. Since 2010, mobile phone use has not changed for 5-7s or 12-15s, while children aged 8-11 are now more likely to use one (61% vs. 55% in 2010).

Compared to 2010, children aged 8-11 are now less likely to use a DVD player/ recorder/ Blu-ray recorder at home (80% vs. 86% for 8-11s), while use among 5-7s and 12-15s has not changed.

Figure 4 also shows the proportion of children aged 5-15 who use a DVR[17]. More than half of 5-7s do so (56%) as do six in ten 8-11s (61%) and close to two in three 12-15s (65%).

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[17] In 2010, parents of children aged 5-15 with digital television were asked whether they had a digital video recorder (DVR) and, if so, whether their child ever watched TV programmes that have been recorded on the DVR. This figure was then rebased to show a DVR usage figure for 2010 among all children. The question was also streamlined to reflect the way in which access/ use/ ownership of all key media in the study is established and, as such, was moved forward in the questionnaire.

Close to nine in ten children now use a fixed or portable games player at home (88%). Children aged 8-11 (92%) and 12-15 (89%) are more likely to use these devices compared to 5-7s (81%).

There are some differences between boys' and girls' use of a games console. Boys in each age group are more likely than girls to use a fixed or portable games player; whether 5-7s (86% vs. 77%), 8-11s (96% vs. 87%) or 12-15s (94% vs. 83%).

Children in AB households are more likely to use the internet at home (93% vs. 82%) compared to all households with children aged 5-15. In contrast, children in DE households are less likely to use the internet (72% vs. 82%) and DVRs (47% vs. 61%). This reflects the lower levels of household take-up of these media in DE households.

Figure 4: Media used by children at home, by age: 2007, 2009, 2010 and 2011
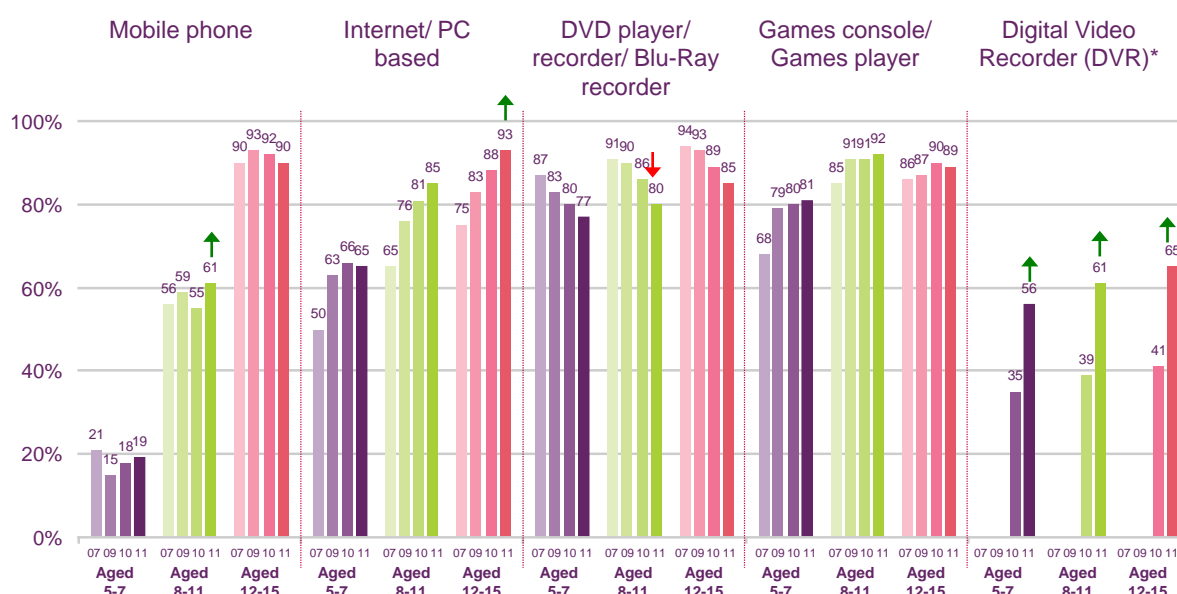
QP3A/B/G/H – I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use (prompted responses, single coded) / NQP5E – Does your child ever watch TV programmes that have been recorded on this Digital Video Recorder (DVR) (spontaneous responses, single coded) **Question wording changed in 2011 for DVR
Base: Parents of children aged 5-15 (985 aged 5-7 in 2007, 576 aged 5-7 in 2009, 558 aged 5-7 in 2010, 573 aged 5-7 in 2011, 1354 aged 8-11 in 2007, 774 aged 8-11 in 2009, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 1357 aged 12-15 in 2007, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011) - significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

In 2011, parents of children with digital television services were asked whether their child ever watches on-demand[18] television services on their television set. Figure 5 shows that, when re-based to represent all children aged 5-15, one in four children aged 5-15 (26%) use these services. Use varies by age, with 8-11s and 12-15s both being more likely than 5-7s to use on- demand television services. Children in DE households are less likely to use these services compared to all children aged 5-15 (20% vs. 26%).

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[18]The question asked about on-demand services in the following way: I would like to ask you about 'on-demand' television services - which allow you to watch certain recently broadcast programmes or films on your TV at a time that suits you rather than when they are broadcast. I don't mean watching programmes that someone in your household has recorded and I don't mean using a computer, laptop or games console to watch television. Instead I mean using your TV service to start watching a recently broadcast programme or film anytime you like. The types of 'on-demand' TV services include Sky Anytime, Virgin on Demand, BT Vision or Tivo. Customers of some TV service providers can watch the TV catch-up services like BBC iPlayer, ITV Player, Channel 4 On Demand, Five TV's Demand Five, or Sky Player through their television. All of these would be considered to be 'on-demand' services. Does your child use the television to watch any of these 'on-demand' services at all?

Figure 5: Use of on-demand television services, by age, gender and socio-economic group: 2011

NQP4C - I would like to ask you about 'on demand' television services - which allow you to watch certain recently broadcast programmes or films on your TV at a time that suits you rather than when they are broadcast. I don't mean watching programmes that someone in your household has recorded and I don't mean using a computer, laptop or games console to watch television. Instead I mean using your TV service to start watching a recently broadcast programme or film anytime you like. The types of 'on demand' TV services include Sky Anytime, Virgin on Demand, BT Vision or Tivo. Customers of some TV service providers can watch the TV catch-up services like BBC iPlayer, ITV Player, Channel 4 On Demand, Five TV's Demand Five, or Sky Player through their television. All of these would be considered to be 'on demand' services. Does your child use the television to watch any of these 'on demand' services at all?
Base: Parents of children aged 5-15 (1717 aged 5-15, 573 aged 5-7, 586 aged 8-11, 558 aged 12-15, 271 boys aged 5-7, 296 girls aged 5-7, 292 boys aged 8-11, 294 girls aged 8-11, 272 boys aged 12-15, 286 girls aged 12-15, 386 AB, 493 C1, 332 C2, 56 DE) - significance testing shows any differences by gender within age or by SEG compared to all aged 5-15 or compared to 2010
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Devices in the child's bedroom

8-11s and 12-15s are now more likely to have digital television in their bedrooms

In order to understand more about children's and young people's media habits, it is useful to know the various types of media activity that take place in a child's bedroom.

Our results show that all children aged 5-15 (100%) have access to a television at home. The incidence of having a television in the bedroom, however, increases with each age group; accounting for more than four in ten 5-7s (45%), six in ten 8-11s (61%), and three in four 12-15s (74%).

While many children have a television, a minority in each age group have a digital television service in their bedroom. Again, the incidence increases with each age group, accounting for more than one in ten 5-7s (15%), three in ten 8-11s (30%), and four in ten 12-15s (40%). Compared to 2010, children aged 8-11 and 12-15 are now more likely to have digital television in their bedroom (30% vs. 22% for 8-11s and 40% vs. 32% for 12-15s).

Games consoles/ games players (either fixed or portable) are the second most common type of medium present in children's bedrooms, accounting for slightly less than half of 5-7s (44%), and seven in ten 8-11s (69%) and 12-15s (70%).

Although most households with children aged 5-15 have PC/ laptop-based internet access (91%), fewer have access to the internet in their bedroom. The incidence increases with each age group; accounting for fewer than one in twenty 5-7s (4%), but one in seven 8-11s (14%), and two in five 12-15s (43%).

In 2011, boys are more likely than girls to have a fixed or portable games console in their bedroom (67% vs. 58%) while girls are more likely to have internet access in their bedroom (24% vs. 19%).

Children in AB socio-economic groups are less likely than all children to have a television in their bedroom (47% vs. 61%). Children in DE households are more likely (69%).

Figure 6: Media in children's bedrooms: 2007, 2009, 2010 and 2011
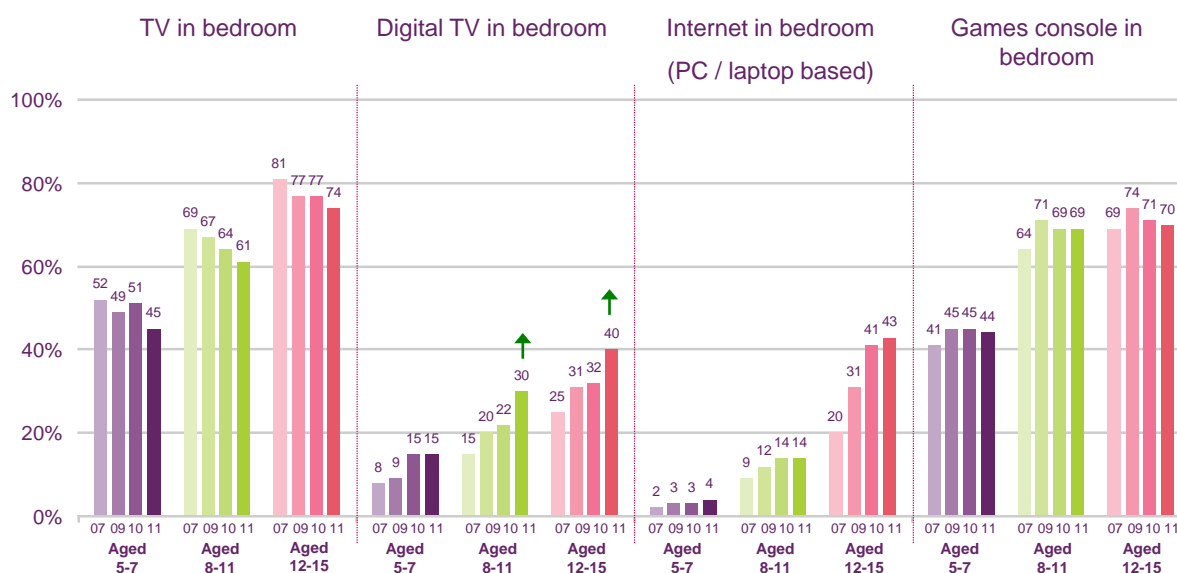
QP3A/B – I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use (prompted responses, single coded)
Base: Parents of children aged 5-15 (985 aged 5-7 in 2007, 576 aged 5-7 in 2009, 558 aged 5-7 in 2010, 573 aged 5-7 in 2011, 1354 aged 8-11 in 2007, 774 aged 8-11 in 2009, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 1357 aged 12-15 in 2007, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011) – significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Regular media activities

Television continues to be the most likely regular[19] media activity undertaken by children of all ages

Children aged 5-15 were asked to choose from a list of media activities, which, if any, they do regularly (defined in this research as "almost every day")[20].

Television continues to be the most popular regular media activity. Over nine in ten children from each group say they watch television almost every day. As was the case in 2009 and 2010, television and watching videos or DVDs are the two activities that are undertaken daily by children in each age group to a similar degree, whereas regular use of the internet, mobile phones and MP3 players increases with the age of the child

Since 2010 there have been some changes in the patterns of regular media use. Children aged 5-7 are now more likely to say they regularly use the internet (43% vs. 36%) with 8-11s more likely to say they regularly play computer or video games (68% vs. 59%). There are three media that children aged 12-15 are more likely to say they regularly use, compared to

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[19] In this context, 'regular' refers to an activity which the child states they do almost every day.
[20] Media use will differ to the figures shown earlier at Figure 4 as those data showed 'any use' as opposed to 'regular use'. Figure 7 data were obtained from a parent while regular media use was obtained from the child.

2010: watching television (95% vs. 92%), using the internet (85% vs. 80%) and watching DVDs or videos (53% vs. 46%).

Boys aged 8-11 and 12-15 are more likely than girls in each age group to say they regularly play computer or video games (81% vs. 55% for 8-11s, 75% vs. 43% for 12-15s). Among 8-11s, boys are also more likely to say they regularly use the internet at home (70% vs. 60%). Among 12-15s, girls are more likely to use a mobile phone almost every day (83% vs.73%), and to listen to radio (38% vs. 28%).

There are also differences in regular media use by household socio-economic group. Children in DE households are less likely than all children to say that they regularly use the internet (60% vs. 66%) or to listen to an MP3 player (21% vs. 28%). Children in the C2 socio-economic group are more likely to say they regularly watch videos or DVDs (65% vs. 55%).

Figure 7: Regular media activities undertaken: 2009, 2010 and 2011
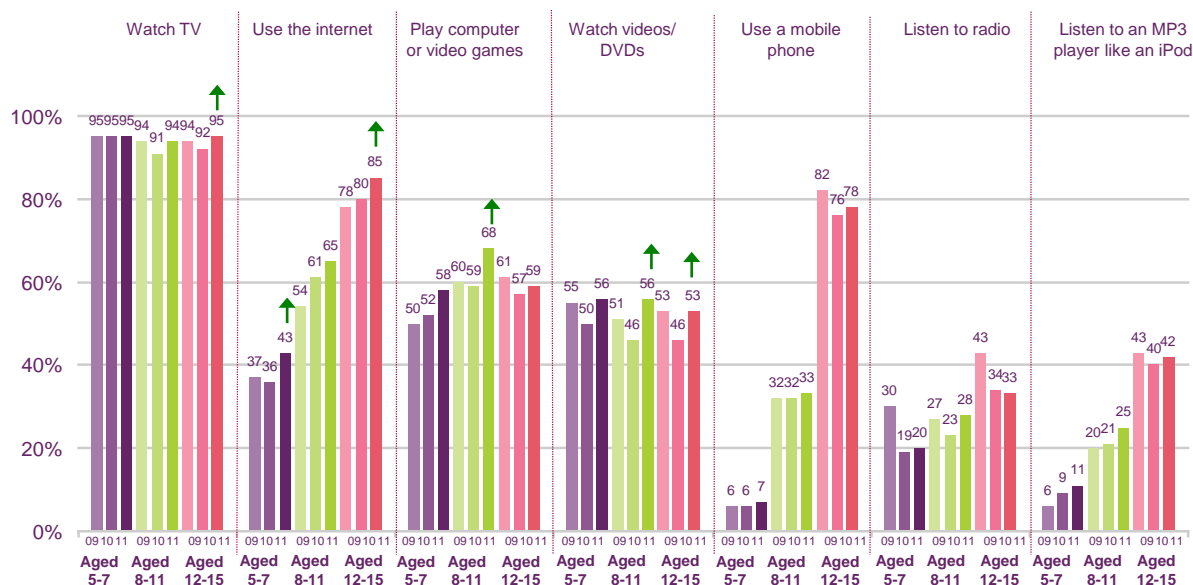
QC39A – Which of the following do you do almost every day? (prompted responses, multi-coded)
Base: Children aged 5-15 (576 aged 5-7 in 2009, 558 aged 5-7 in 2010, 573 aged 5-7 in 2011, 774 aged 8-11 in 2009, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011) – significance testing shows any differences between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Affinity with media activities

12-15s are now more likely to say they would miss the internet or mobile phones than television

Television continues to be the medium that children aged 5-15 say they would miss the most out of all the activities undertaken regularly. By age, 5-7s are most likely to say they would miss television (48%), as are 8-11s, even though there has been a decrease since 2010 for this age group (39% in 2011 vs. 45% in 2010).

Children aged 12-15 are most likely to say they would miss the internet (25%) or their mobile phone (28%), compared to 18% saying television (since 2010 television has declined from 24% of 12-15s). This is the first time that 12-15s have nominated a medium other than television as their most-missed medium[21].

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[21] This is the first time that the difference registers as a significantly different finding.

When comparing by gender, boys in each age group are more likely than girls to say they would miss playing computer games (31% vs. 19% for 5-7s, 39% vs. 12% for 8-11s and 33% vs. 4% for 12-15s). In contrast, girls aged 5-7 are more likely to miss watching DVDs/ videos (15% vs. 8%). Girls aged 8-11 are more likely to miss watching television (47% vs. 30%) and girls aged 12-15 are nearly three times more likely than boys to miss using a mobile phone (41% vs. 16%).

Figure 8: Media activity children would miss the most: 2007 - 2011
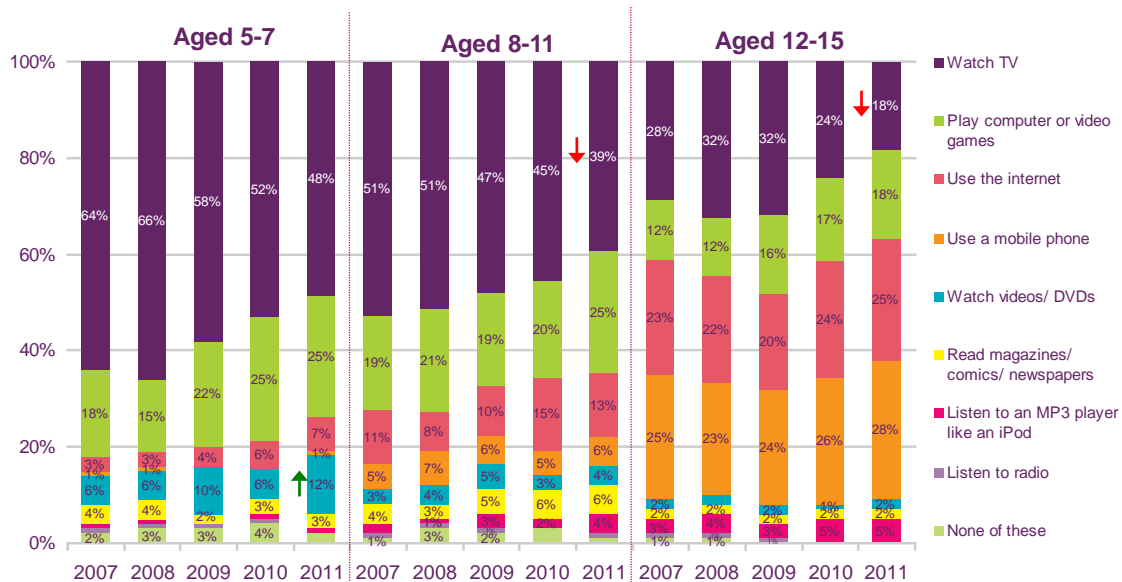
QC39B – Which one of the things you do almost every day, would you miss doing the most if it got taken away?
Base: Children aged 5-15 (985 aged 5-7 in 2007, 563 aged 5-7 in 2008, 576 aged 5-7 in 2009, 558 aged 5-7 in 2010, 573 aged 5-7 in 2011, 1354 aged 8-11 in 2007, 748 aged 8-11 in 2008, 774 aged 8-11 in 2009, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 1357 aged 12-15 in 2007, 755 aged 12-15 in 2008, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011) – sig testing show any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Radio listening, by device

Fewer children listen to the radio at home since 2010

Parents were asked about their child's radio listening within the home, and the types of radio used.

Around four in ten children (42%) listen to the radio at home, with the likelihood of listening increasing with the age of the child (32% of 5-7s, 42% of 8-11s and 50% of 12-15s). Compared to 2010, children aged 5-15 are now less likely to listen to the radio at home (42% vs. 46%), although this is not driven by a change in radio listening within any particular age group.

Two in ten children aged 5-15 (19%) listen to any type of digital radio[22], with a similar proportion of 5-7s (14%) and 8-11s (17%) listening in this way, and around one in four 12-15s (24%). Compared to 2010, digital radio listening has increased among all 5-15s (19% vs. 16%), with this overall change driven by an increase among 8-11s (17% vs. 12%).

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[22]Either through a DAB radio set, through their digital TV service or over the internet.

Two in ten children aged 5-15 listen only through a traditional radio set (22%) and this has decreased since 2010 for 5-7s (18% vs. 26%), 8-11s (23% vs. 32%) and 12-15s (24% vs. 30%).

In 2011, there are some differences by socio-economic group. Children in AB households are more likely than all children to listen to digital radio (24% vs. 19%), with this being specifically attributable to DAB radio listening (12% vs. 5%).

Figure 9: Radio listening at home, by age: 2009, 2010 and 2011
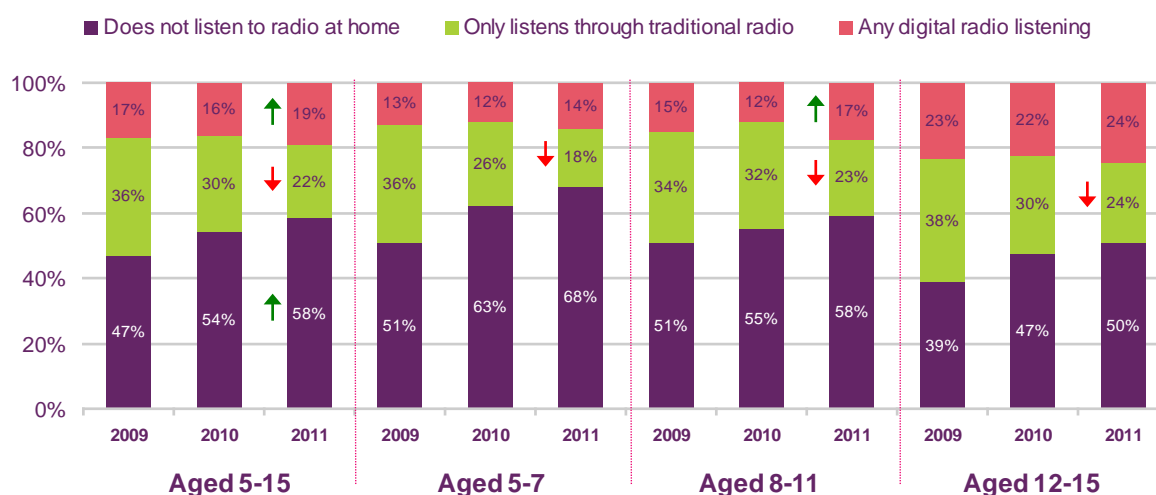
Internet use by device

Children aged 8-11 and 12-15 are increasingly likely to go online at home through a mobile phone

Parents were asked whether their child ever uses devices other than a PC/laptop to access the internet at home (Figure 10).

While slightly more than eight in ten children (82%) use the internet at home through a PC or laptop, two in ten (17%) go online via a fixed or portable games console/ games player, around one in seven (14%) via a mobile phone, one in fourteen through a portable media player (7%) and one in fifty through a tablet PC (2%).

The incidence of children accessing the internet through any of these devices increases with age. Use of a PC/ laptop to access the internet has increased since 2010 for 12-15s (93% vs. 88%), while using a mobile phone to access the internet has also increased for both 12-15s(29% vs. 23%) and 8-11s (9% vs. 4%). As might be expected, nearly twice as many parents of children aged 5-15 with a smartphone say that their child has ever accessed the internet through their mobile phone, compared to parents of children with a mobile phone (29% vs. 17%).

Accessing the internet at home through a fixed or portable games player/ console has not changed since 2010; accounting for around one in ten 5-7s (8%) and around two in ten 8-11s (19%) and 12-15s (23%). In 2011 children aged 12-15 who ever go online through a

fixed or portable games console were asked whether this was mostly to play games online or to visit websites, with nine in ten of these children (89%) saying that they mostly play games online.

Boys aged 8-11 are more likely than girls of this age to ever access the internet at home via a fixed or portable games console/games player (25% vs. 13%), as are boys aged 12-15 compared to girls of this age (33% vs. 14%). Boys aged 12-15 are also more likely than girls to ever access the internet through a portable media player (16% vs. 9%).

The proportion of children in each age group that access the internet at home through any of these devices is nearly identical to the proportion accessing the internet via a PC or laptop. This shows that accessing the internet at home through other devices is very much *in addition to* accessing it through a PC/ laptop. While not shown in Figure 10 below, 2% of all 5-15s only use a device other than a PC or laptop to go online at home, rising to 3% among all 12-15s.

Figure 10: Devices ever used by children to access the internet at home: 2009 - 2011

QP3B/ NQP21A – I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use / Including any ways you may have already mentioned, does your child ever use any of the following devices to go online at home? (prompted responses, single coded) – **NB The question wording changed at Wave 2 2010 – responses from wave 1 and wave 2 2010 have however been combined**
Base: Parents of children aged 5-15 (576 aged 5-7 in 2009, 558 aged 5-7 in 2010, 573 aged 5-7 in 2011, 774 aged 8-11 in 2009, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011)- significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Main means of accessing the internet at home

The majority of children now mostly use laptops for internet access at home

Parents whose child uses the internet at home were asked to say which device the child most often uses to go online at home.

As Figure 11 shows, at an overall level children aged 5-15 who use the internet at home are more likely to mostly use a laptop rather than a desktop PC (56% vs. 33%). This change has occurred since 2010; 5-15s are now more likely to mostly use a laptop (56% vs. 44%) and less likely to mostly use a desktop PC (33% vs. 48%).

The incidence of mostly using other devices is low. Fixed games consoles are named by 4% of all 5-15s who use the internet at home, with this use mostly attributable to 12-15s.

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There are some differences by gender. Boys in each age group are more likely than girls to mostly use a fixed games console to go online at home (5% vs. 0% for 5-7s, 5% vs. 1% for 8-11s and 9% vs. 2% for 12-15s) while girls aged 12-15 are more likely to mostly use a mobile phone (8% vs. 2%).

In 2010 there were no differences across household socio-economic groups in the device mostly used by children to access the internet. In 2011, children in DE households are less likely than all children to mostly use a desktop PC (27% vs. 33%) and more likely to mostly use a mobile phone to access the internet (6% vs. 3%).

Figure 11: Devices used 'mostly' by children to access the internet, 2011
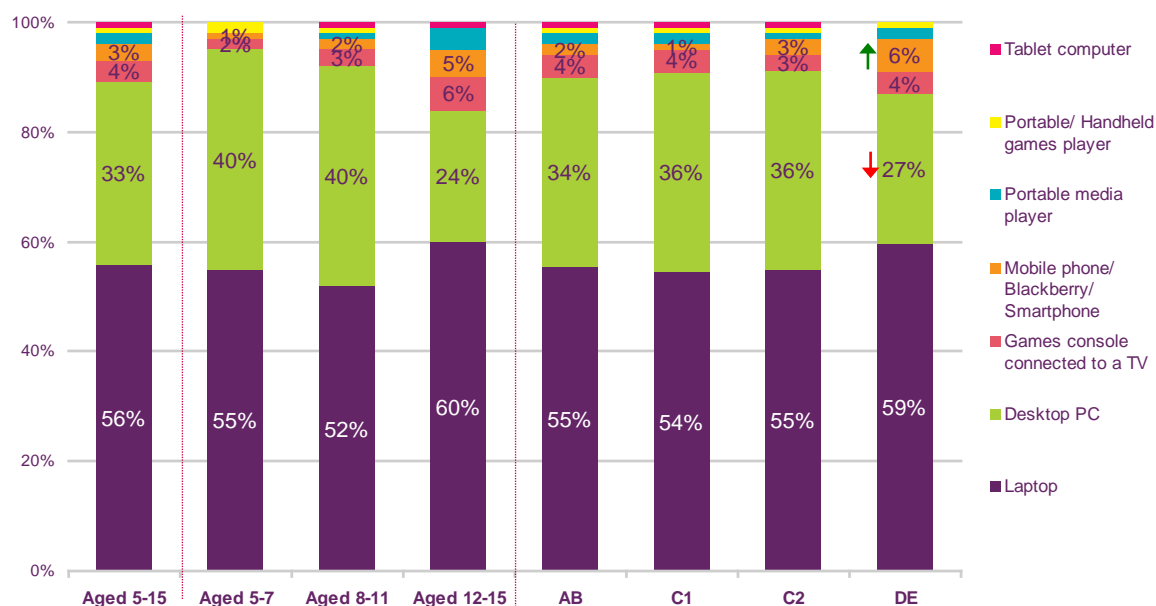
QP21B – And when your child goes online at home, which device do they mostly use? (prompted responses, single coded)
Base: Parents of children aged 5-15 whose child ever goes online at home (1421 aged 5-15, 396 aged 5-7, 496 aged 8-11, 529 aged 12-15, 357 AB, 422 C1, 274 C2, 368 DE) - significance testing shows any differences by SEG compared to all aged 5-15
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Where in the home the internet is accessed

One in three 12-15s continue to mostly use the internet at home in their bedroom

Children who use the internet at home were asked where in the house they most often used it.

The living room continues to be the most often-mentioned location for internet use for each of the age groups

Fewer than one in twenty 5-7s (3%), one in ten 8-11s (10%) and one in three 12-15s (34%) said they mostly used the internet in their bedroom.

Figure 12: Where the child mostly uses the internet, by age: 2007 - 2011

Children who use the internet at home were asked to say if anyone was with them most of the time they used the internet, and whether this was an adult or other children.

Figure 13 shows that the majority of 5-7s and 8-11s say they spend most of the time using the internet with an adult in the room (83% and 67% respectively). However, the incidence of children who spend most of the time using the internet on their own increases with each age group. Those who mostly use the internet on their own account for one in ten internet users aged 5-7 (10%), one in four aged 8-11 (24%) and half of those aged 12-15 (51%).

Since 2010, children are less likely to use the internet on their own (32% vs. 36%) and more likely to use the internet at home in the presence of an adult (59% vs. 55%).

Figure 13: Who is with the child when using the internet at home: 2010 and 2011
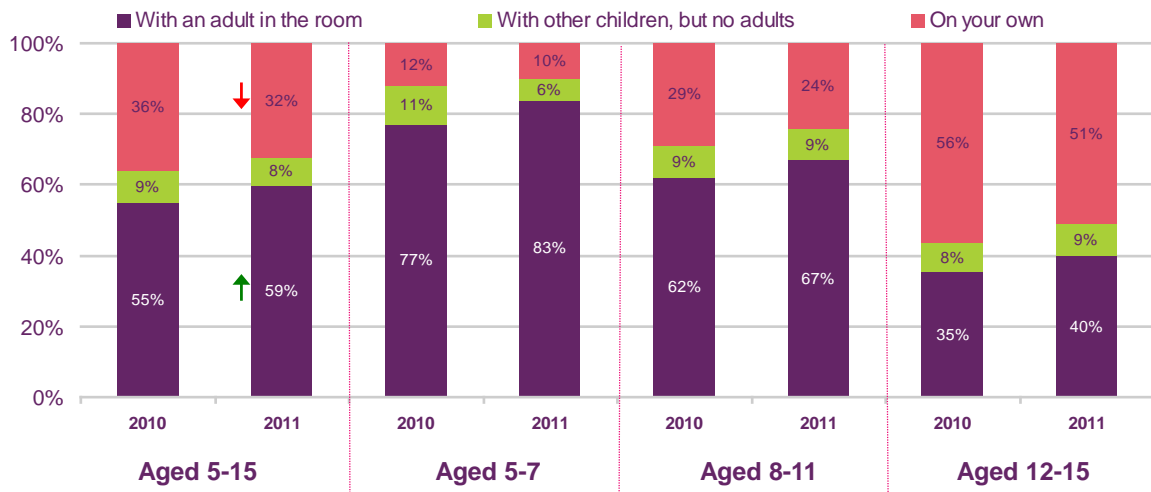
Internet use, by location

One in twelve children do not use the internet at all, in any location

While the main focus of our analysis is upon children's use of the internet at home, we are also interested in whether children use the internet anywhere else (for example, at school, at a library, at the houses of relatives or friends) on any device.

Figure 14 shows where the internet is used (on any device) by 5-7s, 8-11s and 12-15s, and how this has changed over time. Four distinct groups are shown: those who use the internet at home (and may well use it elsewhere); those who use it elsewhere (and may well use it at school but not at home); those who use it only at school; and those who don't use it at all.

The incidence of using the internet at all through any device has not changed for any age group since 2010, and accounts for close to eight in ten 5-7s (77%), and nearly all 8-11s (97%) and 12-15s (99%). There has been an increase in the proportion of 8-11s and 12-15s who use the internet at home, compared to 2010; this now accounts for nearly nine in ten 8-11s (87% vs. 82% in 2010) and nearly all 12-15s (96% vs. 90%).

Around one in twenty 5-15s (5%) only use the internet at school; a decrease since 2010 (5% vs. 7% in 2010). One in twelve (8%) of all 5-15s do not use the internet at all, in any location; this has not changed since 2010.

Figure 14: Where the internet is used by children: 2005, 2007, 2009, 2010 and 2011
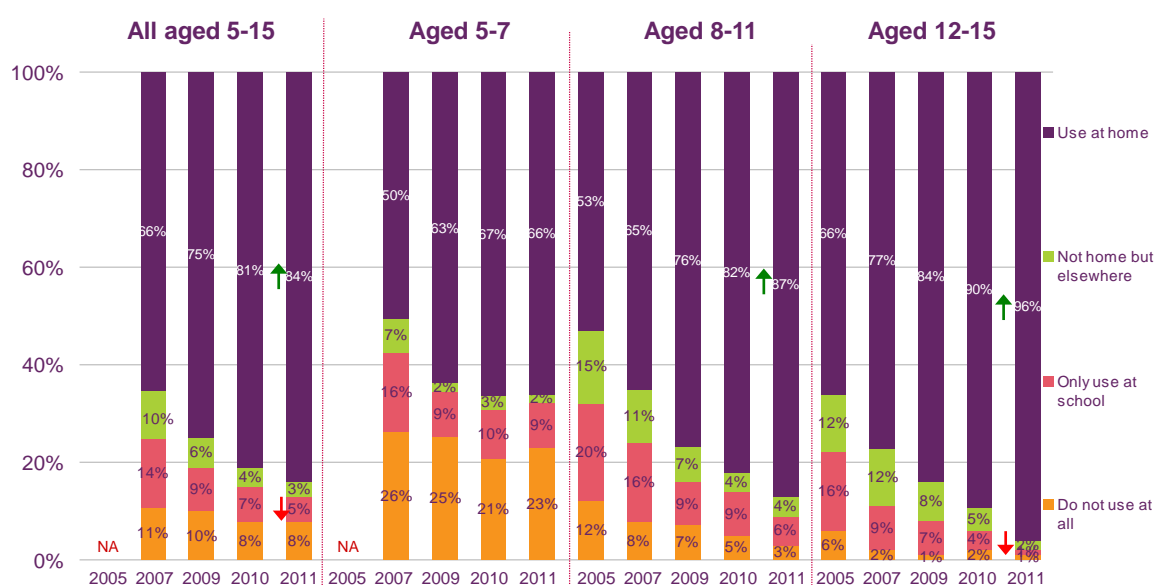
QP3B/ NQP21A/ NQP21B/ QC25 – SUMMARY OF WHERE THE INTERNET IS USED (prompted responses, single coded)
Base: Parents of children aged 5-15 (3696 aged 5-15 in 2007, 2131 aged 5-15 in 2009, 2071 aged 5-15 in 2010, 1717 aged 5-15 in 2011, 985 aged 5-7 in 2007, 576 aged 5-7 in 2009, 558 aged 5-7 in 2010, 573 aged 5-7 in 2011, 772 aged 8-11 in 2005, 1354 aged 8-11 in 2007, 774 aged 8-11 in 2009 ,760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 764 aged 12-15 in 2005, 1357 aged 12-15 in 2007, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011) – significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Devices used to play games

One quarter of boys who play games online do so against people that are not known to them

We asked parents and children a number of questions to find out about the devices they use to play games at home[23]. Most children in each of the three age groups use at least one of the devices we asked about to play games; accounting for close to nine in ten 5-7s (86%), and nine in ten 8-11s (93%) and 12-15s (90%).

Games consoles connected to a television and handheld/ portable games consoles are the most commonly-used devices for gaming; used by at least six in ten children in each age group. Compared to 2010,[24] however, children aged 12-15 are now less likely to play games on handheld consoles (57% vs. 66%). In comparison to these main devices for games playing, fewer children ever play games using a computer or laptop: around four in ten 5-7s (36%), close to half of 8-11s (48%) around four in ten 12-15s (45%).

Around two in ten 8-11s (18%) and 12-15s (23%), and one in ten 5-7s (9%) play games using a mobile phone. A significant minority of 12-15s play games through other devices such as an MP3 player (7%) or portable media player (12%).

Boys are more likely than girls to use any of the devices for gaming that we asked about among 8-11s (96% vs. 90%) and 12-15s (96% vs. 85%), with no overall difference among 5-7s (88% vs. 84%). Much of the overall difference in gaming between boys and girls aged 5-15 continues to be due to the higher use among boys of games consoles connected to a television. In previous years boys aged 5-15 were also more likely than girls to play games on a portable games console and on a computer or laptop, but this is not the case in 2011.

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[23] Previously, we asked about devices used to play games at home or elsewhere, but in 2011 these and subsequent questions were re-worded to focus specifically on at home use. Any differences over time in children's game playing behaviour and attitudes could therefore be attributable to these changes.
[24] Figure 15 shows six out of the eight devices we asked about, the two devices not shown (PDA/ tablet computer) are only ever used by under 4% of all children aged 5-15.

Figure 15: Devices used for gaming, by age: 2009, 2010 and 2011
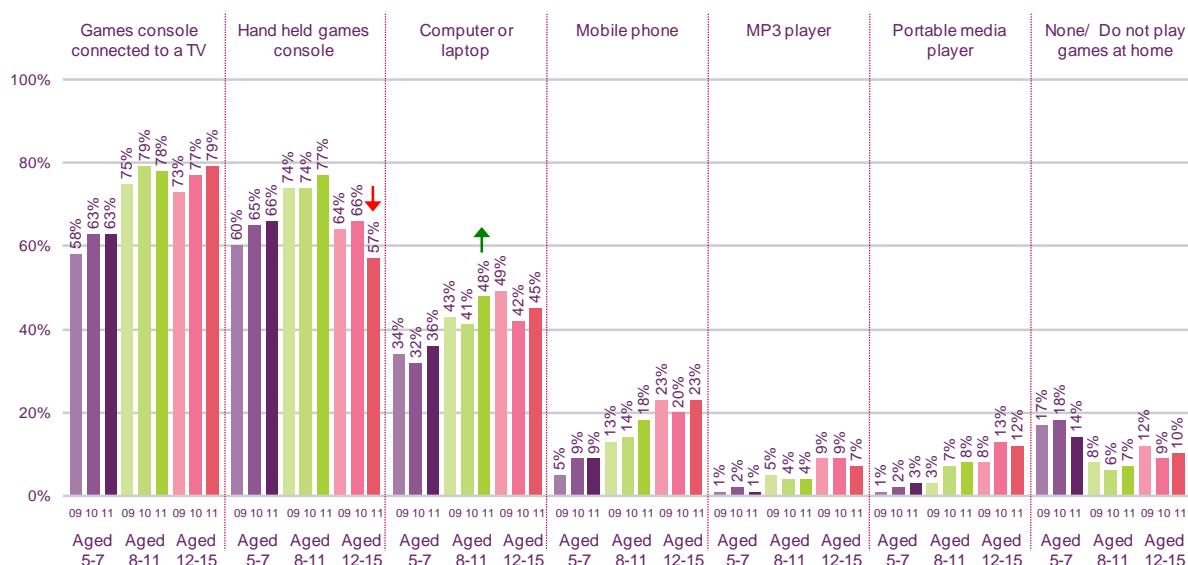
NQP43– Does your child ever play games at home in any of these ways? (prompted responses, multi-coded) – only showing responses by 4% or more
Base: Parents of children aged 5-15 (576 aged 5-7 in 2009, 558 aged 5-7 in 2010, 573 aged 5-7 in 2011, 773 aged 8-11 in 2009, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15) – significance testing shows any differences between 2010 and 2011 – NB in 2011 the questions about gaming now focus on use at home as opposed to use at home or elsewhere
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parents of children aged 5-15 who use any of the devices for gaming were also asked whether their child ever plays games at home over the internet[25]. A significant minority of children who play games have ever played online; one in five 5-7s (20%), more than one in three 8-11s (36%) and slightly more than two in five 12-15s (43%).

Since 2010 children aged 8-11 who play games at all are more likely to play games online at home (36% vs. 28% in 2010), with no change for 5-7s or 12-15s.

Among those children who ever play games, playing online is more likely among boys, with this difference driven by boys aged 12-15 being more likely to play in this way compared to girls (52% vs. 34%). Children in AB households who ever play games are also more likely than all children to ever play games online at home (43% vs. 35%).

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[25] In 2010 the question referred specifically to single or multiplayer games over the internet but these references were removed in 2011.

Figure 16: Online gaming, by age: 2009, 2010 and 2011

In 2011, parents of children aged 5-15 who ever play games online at home were asked about the ways in which their child played these games online: playing games on their own against the computer or games player, playing against someone else in the same room as them, playing against someone else they know personally who is playing elsewhere or playing against one or more other people they do not know personally who are playing elsewhere.

Figure 17 shows that the majority of children aged 5-15 (74%) who play games online play on their own/ against the computer or games player. Around four in ten online games players aged 5-15 (43%) play against someone else who is playing elsewhere, with one in three (35%) playing against someone else in the same room as them. A sizeable minority of children aged 5-15 (18%) play against one or more other people they do not know personally. Aside from playing on their own/against the computer or games player, children aged 12-15 are more likely than children aged 8-11 to play in each of these ways. Close to three in ten children aged 12-15 (28%) play games against people they do not know personally.

Boys aged 5-15[26] are more likely than girls to play against someone else they know personally who is playing elsewhere (52% vs. 30%). In addition, boys are more than three times more likely to play against people they do not know personally (24% vs. 7%).

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[26] Due to low sample sizes it is not possible to look at differences by gender within each age group.

Figure 17: Types of game playing undertaken by children, by age: 2011[27]
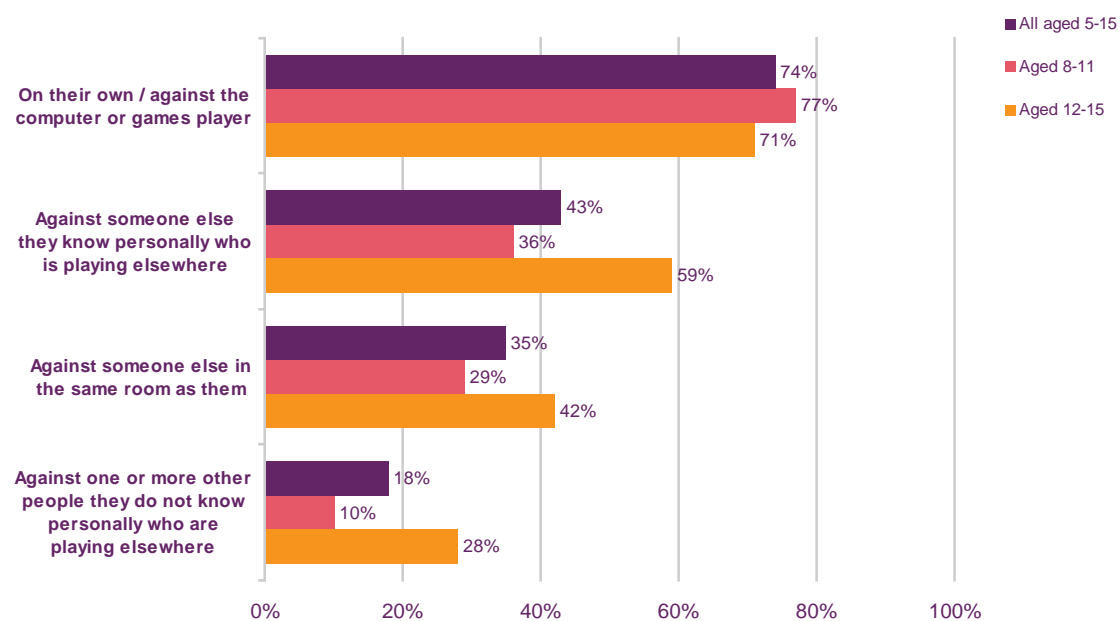
NQP46B– When your child plays games at home over the internet, which of these describes how they are playing?
Base: Parents of children aged 5-15 whose child plays games over the internet at home (524 aged 5-15, 199 aged 8-11, 220 aged 12-15) – NB the data for children aged 5-7 is not shown due to an effective sample size of only 85 interviews.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

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[27] Figure 17 only shows data relating to all 5-15s, 8-11s and 12-15s because of a low effective sample size of only 85 for children aged 5-7.

Children's use of media

This section describes the use that children make of different media. It details the self-reported levels of consumption for each medium, and the types of activities carried out, including any social networking activity.

Key findings

- Children aged 5-15 spend most time watching TV. For 12-15s the next most-used medium is the internet, while for 5-7s and 8-11s it is gaming.

- Estimated weekly consumption for television, internet and radio has not changed since 2010. Game playing consumption has increased for each age group since 2010.

- 12-15s continue to have higher mobile phone consumption than 8-11s, and girls in each age group send more messages compared to boys.

- Children with a smartphone send more messages and make more calls per week compared to those with any type of mobile phone, and also tend to use their phone for a broader range of activities.

- While 12-15s are most likely to use the internet at least weekly for schoolwork or homework or social networking, 8-11s are most likely to use if for schoolwork or homework and 5-7s are most likely to use the internet for playing games.

- 12-15s are more likely than 8-11s to have experience of almost all types of online creative activity. But 8-11s are more likely to have created a character or avatar online.

- Social networking activity has not increased since 2010, with 3% of 5-7s, 28% of 8-11s and 75% of 12-15s having an active profile. Girls aged 12-15 are more likely than boys to have a social networking profile (80% vs. 70%).

- One third (34%) of 8-12s have an active profile on social networking sites that require users to register as being aged 13 or over, as in 2010.

- Where parents and children have a profile on the same social networking site, it is very likely that the parent will be listed as a friend of their child: accounting for 59% of all 8-15s with a social networking site profile or 95% of the possible cases where the parent could be listed as a friend. Where parents are 'friends' in this way, it is more likely that they will say they check what their child is doing on social networking sites.

- Using social networking sites to communicate with people not directly known to the child is less likely than in 2010, both for 8-11s (12% vs.22%) and 12-15s (24% vs. 32%).

Media consumption

Children continue to spend more time watching TV than using other media

We asked parents of younger children (aged 5-11) and asked older children (aged 12-15) to estimate the hours spent at home by the child using each of the four media: television, radio, internet and games players/ consoles, on a typical school day and on a typical weekend day[28].

Figure 18 shows that children in each age group spend more time watching television compared to their use of other media. However, the difference in consumption between television and the internet becomes less marked for children aged 12-15.

In both 2009 and 2010 children aged 5-7 spent more hours per week gaming than using the internet. This remains the case for 5-7s in 2011, and is now also true of children aged 8-11.

Figure 18: Estimated weekly hours of media consumption at home among users, by age: 2011
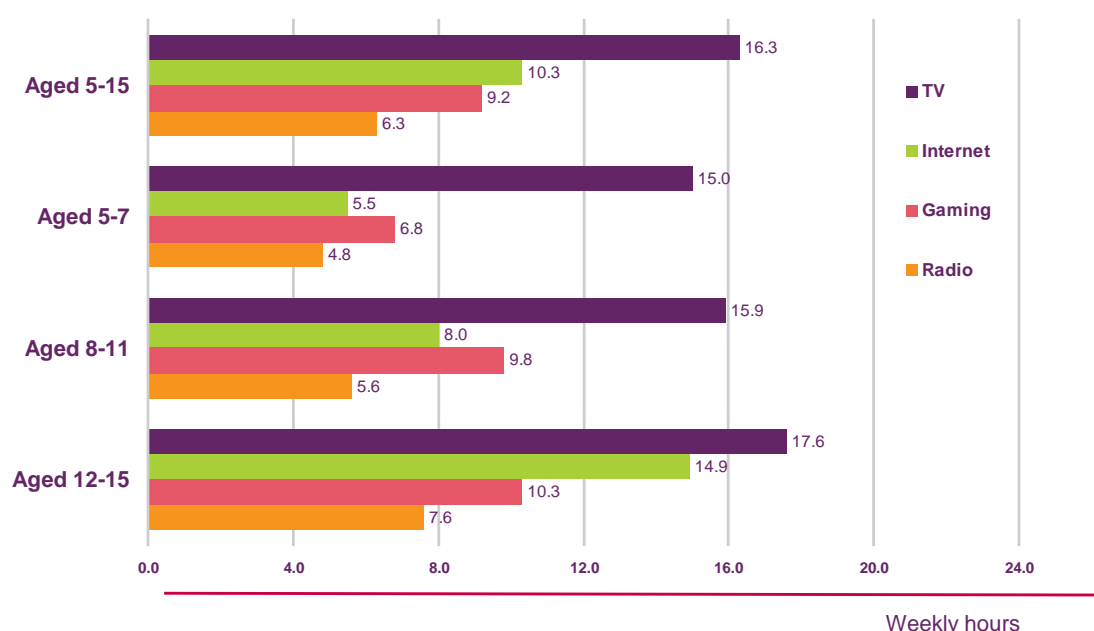
[28]Estimates of hours shown are not based on all children, but on all children who use each of the media at home. Because these estimates are self-reported it is likely that a degree of under- and over-reporting will be present and the estimates should be taken as indicative only.

Children in DE households spend more time watching television

Figure 19 shows the weekly hours of estimated television consumption since 2007.[29]

In 2011, parents of children aged 5-7 state that their child watches 15 hours of television per week, which is similar to the estimate volume for those aged 8-11 (15.9 hours) and lower than the estimated volume for those aged 12-15 (17.6 hours).

In 2011, children in DE households have a higher estimated volume of television watching per week compared to all children aged 5-15 (17.3 hours vs. 16.3 hours) while children in AB households have a lower estimated volume (14.5 hours vs. 16.3 hours).

Figure 19: Estimated weekly hours of television consumption, by age and socio-economic group: 2007 - 2011
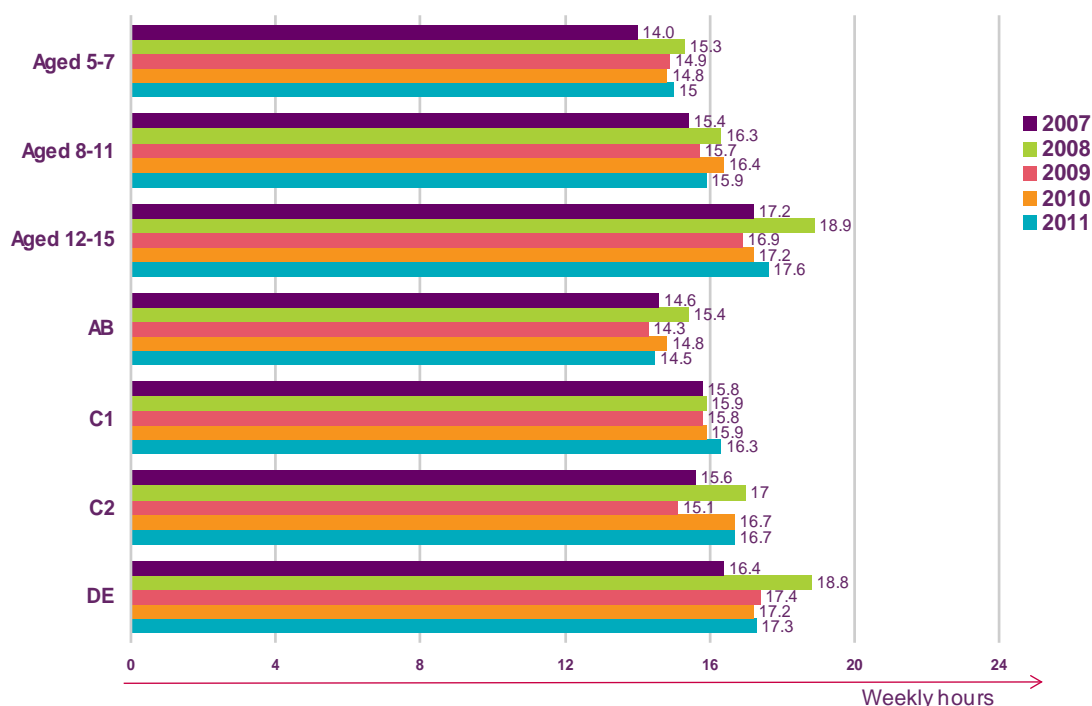
QP8A-B/ QC3A-B – How many hours would you say he/ she spends watching TV on a typical school day/ on a weekend day? (spontaneous responses, single coded)
Base: Parents of children aged 5-11 who watch TV at home and children aged 12-15 who watch TV at home (VARIABLE BASE) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

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[29] BARB television viewing data gives higher average viewing per week – see text box below and Annex 2. While the age-groups are not directly comparable, in 2010 4-15s watched an average of 17 hours and 34 minutes each week, 4-9s watched 18 hours and 20 minutes, and 10-15s watched 16 hours and 52 minutes.

Children's viewing behaviour

Using BARB data, the following summarises background information about children's viewing behaviour[30]. A detailed chart pack is available in Annex 2.

Time of day and quantity of viewing

In 2010 children aged 4 to 15 watched an average of 17 hours 34 minutes of television per week, up from 15 hours 37 minutes in 2007.

Children's viewing peaks between 8pm and 8.30pm, and 80% of children's total viewing takes place before the 9pm watershed.

Looking at post-watershed viewing, specifically 9pm to midnight, there has been an increase in the proportion of children watching television during this time; both overall and by age group. In 2007 the figure was 12% of children aged 4-15; by 2010 it had increased to 14%. Among 4-9 year olds the figure went from 8% in 2007 to 10% in 2010 and among the 10-15 age group it increased from 15% to 18% over the same period.

Location and supervision of viewing

A small proportion of children's viewing takes place in their bedroom (5%), and this rises with age. In 2010 the 4-9 age group watched just2% in their bedrooms, compared to 8% for the 10-15s.

Among children aged 4-15 almost a fifth (19%) watch television alone in the hour immediately after the watershed (between 21:00-22:00).

Type of viewing

Over two-thirds (68%) of total viewing takes place in 'adult' airtime[31] and this has remained fairly stable since 2005. But this figure varies significantly by age, increasing to 80% among 10-15 year olds. Nearly a third (32%) of viewing is attributed to children's programming, with the majority (21%) attributed to commercial children's airtime and 11% attributed to non-commercial children's airtime.

Live and time-shifted viewing

The vast majority of time is spent viewing live broadcasts (87% among all children aged 4-15). This proportion has changed little since 2007; in 2010 older children (10-15) time-shift a slightly higher proportion of their viewing (15%) vs.11% among the younger age group (4-9).

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[30]Note that on 1 January 2010 the new BARB measurement panel of 5,100 homes went live. Any comparison between trend data based on the old panel with that based on the new panel should therefore be made with caution.

[31] This consists of all the main terrestrial channels (BBC1, BBC2, ITV1, Channel 4 and Channel 5) excluding the slots when children's programmes are shown, combined with all digital channels except for the dedicated children's channels.

Children in DE households spend more time online at home

The estimated weekly volume of use of the internet at home increases with the age of the child (5.5 hours for 5-7s, 8.0 hours for 8-11s and 14.9 hours for 12-15s).

Compared to all children aged 5-15, those in AB households spend fewer hours online in a typical week (9.2 hours vs. 10.3 hours) while those in DE households spend more time online (11.4 hours).

Figure 20: Estimated weekly hours of internet consumption, by age and socio-economic group: 2007, 2008, 2009, 2010 and 2011
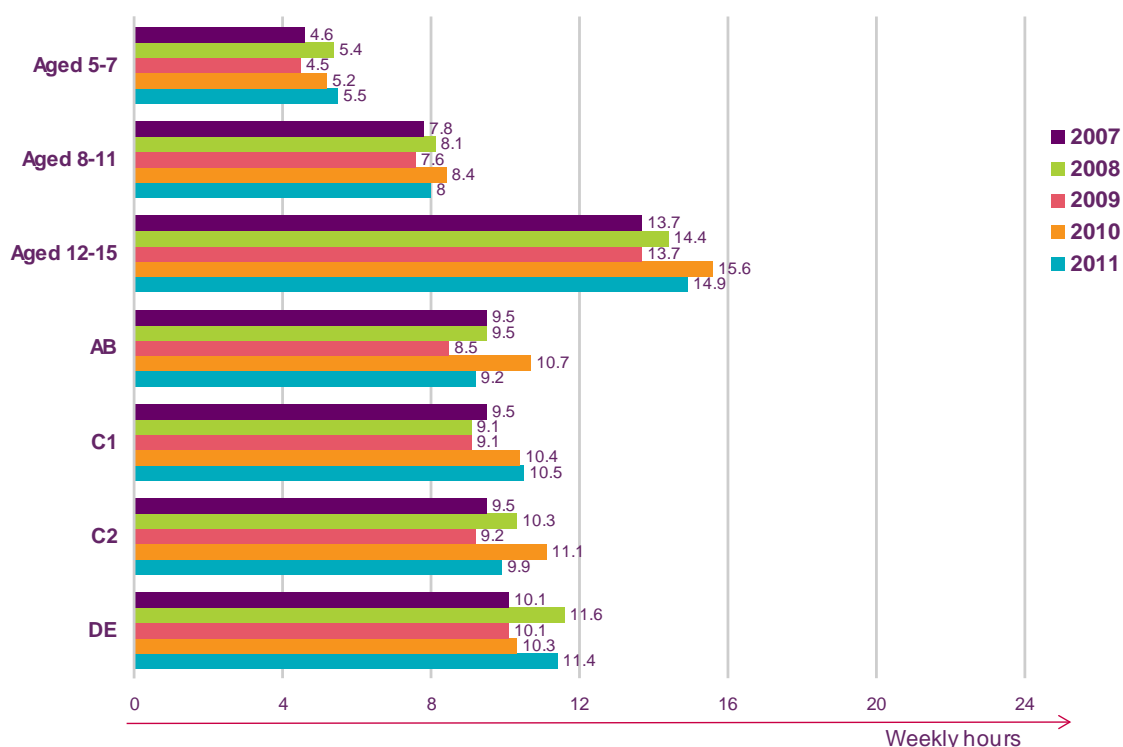
QP23A-B/QC12A-B – How many hours would you say he/she spends using the internet at home on a typical school day/ on a weekend day? (spontaneous question, single coded)
Base: Parents of children aged 5-11 who use the internet at home and children aged 12-15 who use the internet at home (VARIABLE BASE) – significance testing shows any differences between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Children in each age group spend more time on gaming compared to 2010

Children aged 5-7 are estimated to spend fewer hours per week playing games (6.8 hours) than either 8-11s (9.8 hours) or 12-15s (10.3 hours).

Boys spend more time than girls game-playing in a typical week (11.1 vs. 7.2 hours).

Compared to 2010, children in each age group spend more hours gaming in a typical week. There has also been an increase among children in AB, C1 and C2 households, as indicated in Figure 21.

Figure 21: Weekly hours of game playing consumption, by age and socio-economic group: 2008, 2009, 2010 and 2011
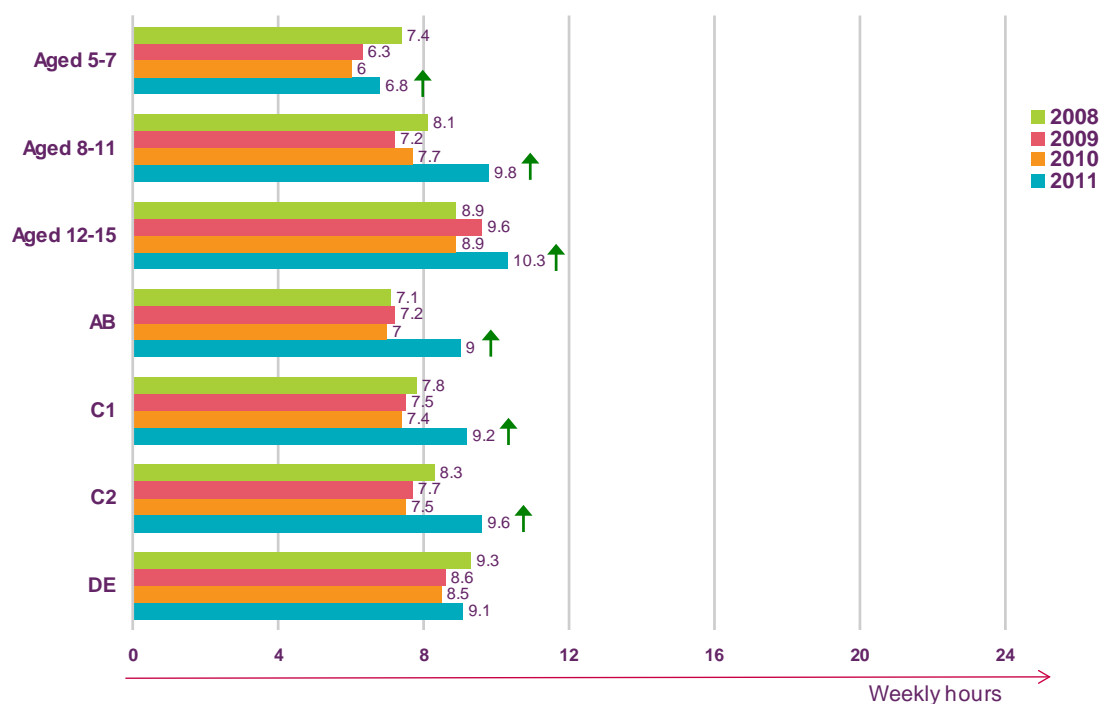
QP45A-B– How many hours would you say he/ she spends playing these games on a typical school day/ on a weekend day?
Base: Parents of children aged 5-11 whose child plays games on a games console, PC or laptop etc and children aged 12-15 (VARIABLE BASE) – significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Older children spend more time listening to the radio

Estimated weekly consumption of radio at home is higher among 12-15s (7.6 hours per week) than for 5-7s (4.8 hours) or 8-11s (5.6 hours).

Figure 22: Estimated weekly hours of radio consumption, by age and socio-economic group: 2007, 2008, 2009, 2010 and 2011
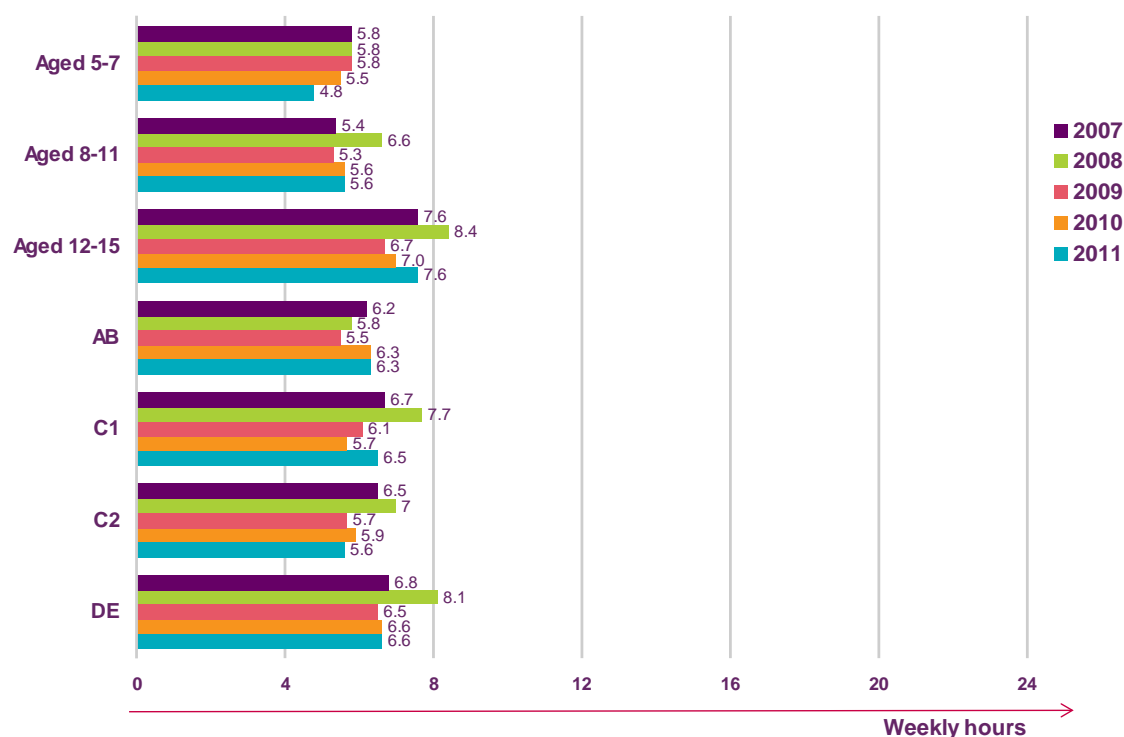
12-15s spend more time on their mobile phone compared to other age groups

Parents of children aged 5-7, and children aged 8-11 and 12-15[32] were also asked about the volume of calls made and text messages sent through their mobile phone in a typical week[33].

Mobile phone consumption (both voice calls and messaging) is greater for children aged 12-15 than for 8-11s.

In 2011, girls aged 8-11 have a higher estimated volume of calls per week than boys (7 vs. 5 calls for 8-11s) and send more messages in a typical week (28 vs. 16 texts). Girls aged 12-15 have a higher estimated volume of messages sent than boys (105 vs. 75).

Children with a smartphone make more calls and send more messages compared to all children with any mobile phone (16 calls vs. 12 calls and 86 vs. 65 messages per week).

Compared to 2010, 12-15s are now estimated to make fewer calls per week (16 vs. 20 calls) and send fewer messages (91 vs. 113 messages)[34].

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[32] In 2011 children aged 8-11 were asked to estimate the volume of calls made and text messages sent. In previous years these data were collected from their parents. In 2011 children and parents were also asked to include any messages that were sent via any Instant Messaging applications such as Bing or BlackBerry Messenger (BBMs) in their estimates, whereas in previous years the wording of the questions referred only to text messages.
[33] Figure 23 only shows data relating to 8-11s and 12-15 as there were too few 5-7s with their own mobile phone to report on.

Figure 23: Weekly calls made and text messages sent by users: 2007, 2008, 2009, 2010 and 2011
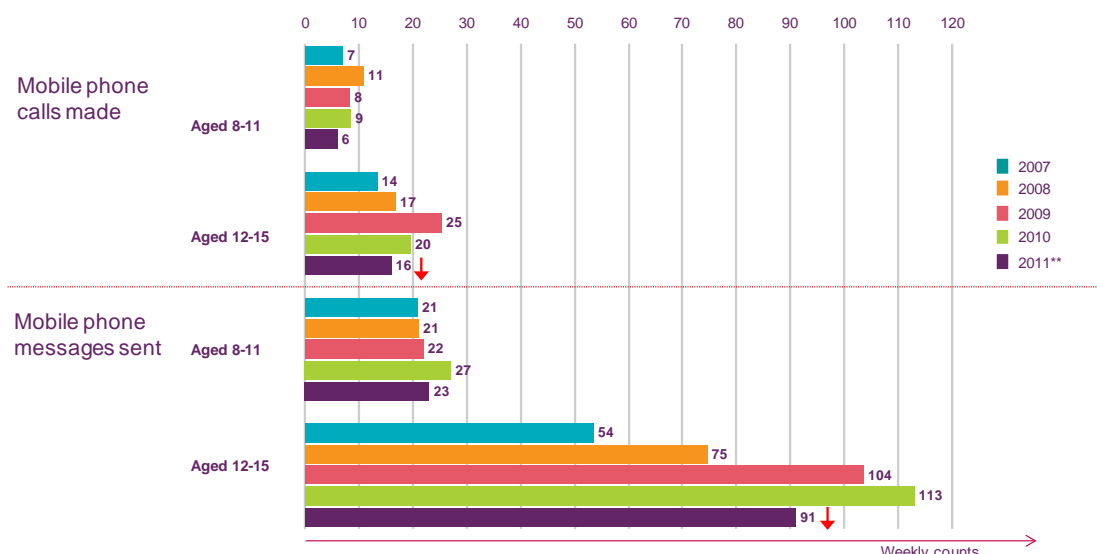
QP35A-B/QP36A-B – How many calls/texts would you say he/ she makes/sends using his/ her mobile phone on a typical school day/ on a weekend day?
Base: Parents of children aged 5-7 whose child has their own mobile phone and children aged 8-11 with their own mobile phone (VARIABLE BASE) – significance testing shows any differences between 2010 and 2011 ** IN 2011 VOLUMES OF CALLS AND TEXTS WERE ASKED OF CHILDREN AGED 8-11 RATHER THAN THEIR PARENTS, AS IN PREVIOUS YEARS – QUESTION WORDING AMENDED TO ALSO INCLUDE MESSAGES SENT THROUGH INSTANT MESSAGING APPLICATIONS SUCH AS PING OR BBMS
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Types of activity carried out on a mobile phone

Text messaging is the most popular regular mobile phone activity

Children aged 8-15 with their own mobile phone were prompted with a range of types of use and were asked to say which they ever do with their mobile phone, and how often.

There are three activities that have ever been undertaken using a mobile phone by a majority of 8-11s in 2011: making or receiving calls (91%), sending or receiving texts (88%) and taking photos (58%). Close to half have ever used their mobile phone to listen to music (49%) or to play games on the phone (45%).

In contrast there are seven activities that a majority of 12-15s have ever undertaken using a mobile phone: making or receiving calls (97%), sending or receiving texts (97%), taking photos (74%), listening to music (66%), sending/ receiving photos (57%), taking videos (55%) and playing games on the phone (53%).

There are seven activities that girls aged 12-15 are more likely to have ever undertaken with their mobile phone compared to boys, with the difference in some instances being close to twenty percentage points: taking photos (84% vs. 63%), listening to music (77% vs. 55%), sending/ receiving photos (65% vs. 48%), taking videos (63% vs. 46%), visiting social networking sites (41% vs. 28%), visiting websites (37% vs. 25%) and using Instant Messaging applications (25% vs. 16%).

There are two differences by socio-economic group: children aged 8-15 in AB households are more likely than all children aged 8-15 to ever use their phone to make/ receive calls (100% vs. 95%), while children in C1 households are more likely to use their phone to send or receive Twitter updates (10% vs. 5%).

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[34] Question wording was amended in 2011 which may be a factor in this change in frequency of calls and messages.

Figure 24 shows the proportion of children aged 8-11 and 12-15 who have ever carried out the top 10 of the 18 activities with their mobile phone[35].

Figure 24: Mobile phone activities ever carried out by owners, by age: 2011

QC36A-O – Do you use your mobile phone to do any of these? (prompted responses, single coded) - Only shows top 10 activities across all 8-15s with their own mobile phone
Base: Children aged 8-15 with their own mobile phone (274 aged 8-11 and 496 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011
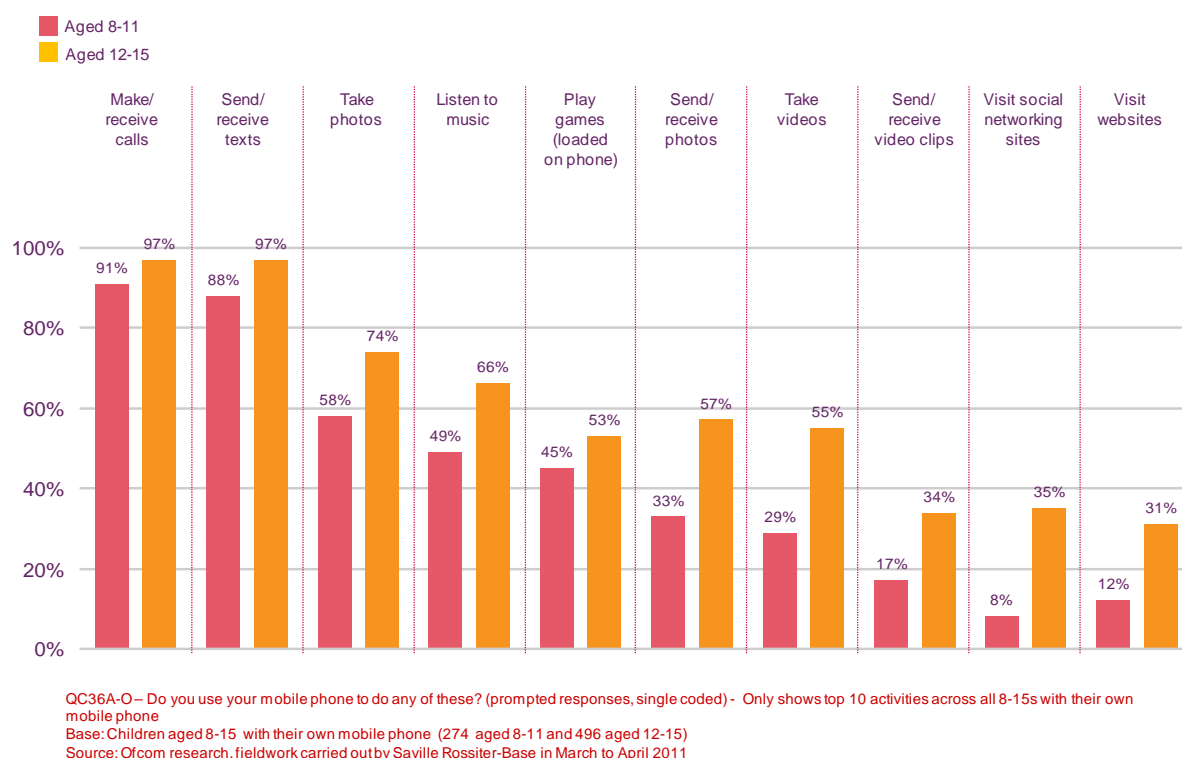
The three most popular regular activities undertaken on their mobile phone among 8-11s and 12-15s are: sending/ receiving text messages (61% vs. 85%) making/ receiving calls (51% vs. 73%) and listening to music (30% vs. 51%). The results in Figure 25 show that 12-15s are more likely to use their phone for a wider range of activities compared to 8-11s.

Where it is possible to make a comparison, since 2010, 8-11s are now more likely to use their mobile phone weekly to visit social networking sites (6% vs. 2%) and less likely to use their phone to take photos (25% vs.34%). 12-15s are now more likely than in 2010 to use their mobile phone weekly for visiting social networking sites (27% vs. 15%), to visit websites (19% vs. 14%), to visit sites such as YouTube to view videos uploaded by others (12% vs. 5%) and to play games online (8% vs. 3%). They are less likely than in 2010 to use their phone for making or receiving calls (73% vs. 79%) or for taking photos (44% vs. 53%).

In 2011, there are several differences by gender. Girls aged 8-11 are more likely than boys to use their mobile phone on a weekly basis to send/ receive text messages (69% vs. 52%) and to take photos (32% vs.16%). Differences between boys and girls are more evident among 12-15s with a mobile phone. Girls are more likely to use their phone on a weekly basis to send/ receive texts (92% vs. 78%), to make/ receive calls (78% vs. 68%), to listen to music (59% vs. 44%), to take photos (58% vs. 31%), for social networking (34% vs. 21%), to

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[35] Figure 24 shows the top ten of the 18 activities that we asked about. The remaining eight activities ever undertaken by mobile phone users aged 8-11 and 12-15 are: look at videos or clips posted by other people on sites like YouTube (7% 8-11, 20% 12-15), use Instant Messaging applications (2%, 21%), play games over the internet using your phone (9%, 16%), send or receive emails (3%, 16%), put photos or videos on sites like YouTube for others to see (3%, 12%), update your location on a service like FourSquare or Facebook Places (2%, 11%), watch TV programmes or clips (4%, 10%), send or receive Twitter updates using your phone (1%, 8%).

send/ receive photos (20% vs. 12%), for using Instant Messaging applications (20% vs. 10%) and to update their location on services like Foursquare (10% vs. 4%).

There are three differences by socio-economic group: children aged 8-15 in AB households are more likely than all children aged 8-15 to use their phone weekly to send/ receive texts (85% vs. 77%) and to make /receive calls (76% vs. 65%), while children in C1 households are more likely to use their phone to send Twitter updates (7% vs. 3%).

Figure 25 shows the proportion of children aged 8-11 and 12-15 who carry out the top ten of the 18 activities with their mobile phone at least once a week[36].

Figure 25: Mobile phone activities carried out at least once a week, by age: 2011

QC36A-O – Do you use your mobile phone to do any of these? (prompted responses, single coded) - Only shows top 10 activities undertaken at least once a week across all 8-15s with their own mobile phone
Base: Children aged 8-15 with their own mobile phone (274 aged 8-11 and 496 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011
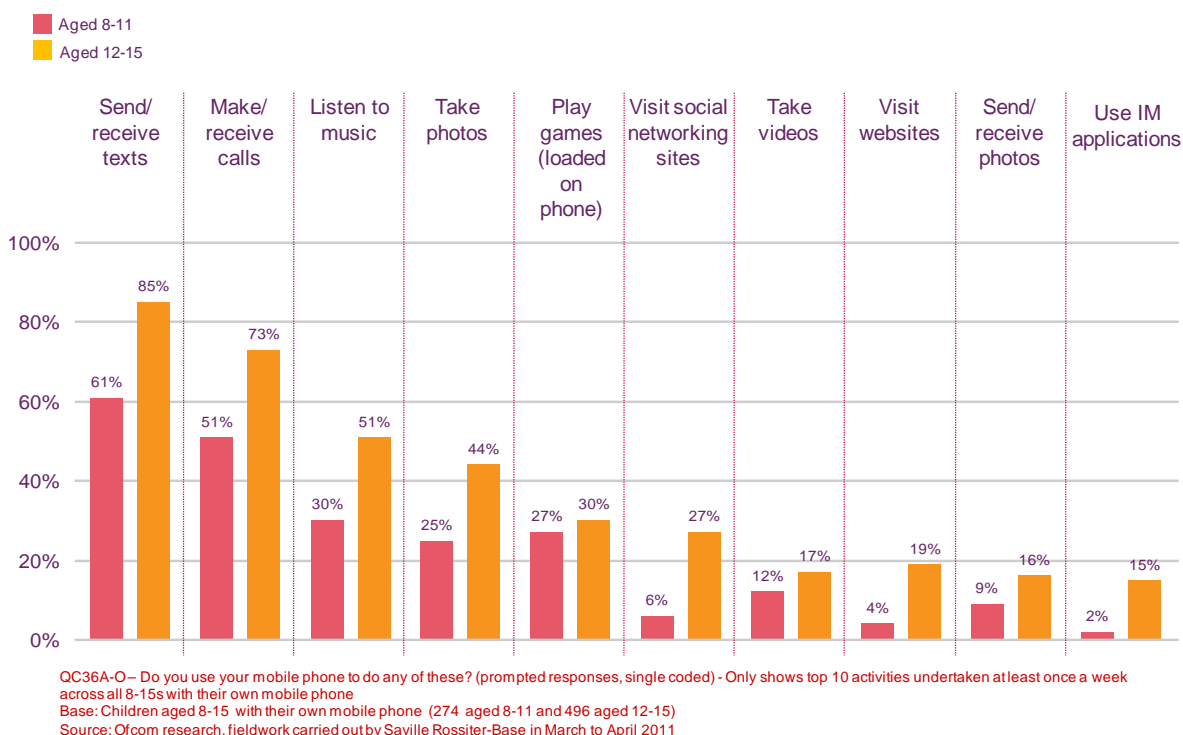
Children with a smartphone tend to use their phone for a broader range of activities

Figure 26 shows the top ten weekly activities undertaken by children aged 8-15 with a smartphone, compared to those aged 8-15 with any mobile phone. Smartphone users are more likely to undertake all of the activities that we asked about at least weekly, compared to all children aged 8-15 with any mobile phone.

In terms of online activities undertaken by smartphone users, social networking is the most popular, with 44% doing this at least weekly. This is followed by 28% saying they visit websites in general.

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[36] Figure 25 shows weekly use of the top ten of the 18 activities that we asked about. The remaining eight activities undertaken at least weekly by mobile phone users aged 8-11 and 12-15 are: look at videos or clips posted by other people on sites like YouTube (3% 8-11, 12% 12-15), send or receive emails (1%, 9%), play games over the internet using your phone (2%, 8%), update your location on a service like FourSquare or Facebook Places (1%, 7%), send or receive video clips (1%, 5%), send or receive Twitter updates using your phone (0%, 5%), put photos or videos on sites like YouTube for others to see (0%, 5%), watch TV programmes or clips (2%, 3%).

Where it is possible to make a comparison, since 2010, 8-15s with a smartphone are more likely to use their phone at least weekly for two activities: visiting social networking websites (44% vs. 25%) and using Instant Messaging applications (such as BBM) (22% vs. 14%).

Figure 26: Mobile phone activities carried out at least once a week, by children aged 8-15 with a smartphone, and all children aged 8-15 with a mobile phone: 2011

All 8-15s with a mobile phone
All 8-15s with a Smartphone

QC36A-O – Thinking about what you use your mobile phone for, do you use it to do any of these? - (prompted responses, single coded) - SHOWING TOP 10 ACTIVITIES UNDERTAKEN WEEKLY
Base: Children aged 8-15 with their own mobile phone (770 aged 8-15, 289 aged 8-15 with a smartphone- significance testing shows any differences between these two groups
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Those aged 12-15 who use a smartphone are now more likely to use their phone to visit social networking sites compared to 2010 (50% vs. 33%).

Breadth of internet activities carried out at home in a typical week

Children who use the internet at home were prompted with a range of internet activities and asked to say which they ever do online, and how often they do them[37]. Children aged 5-7 were asked about 11 different internet activities, while children aged 8-11 and aged 12-15 were asked about a further eight activities, totalling 19 activities for these older children.

These individual uses have been grouped into 11 types[38] of use, to assess breadth of use of the internet and to enable comparison. These types are:

- Schoolwork/ homework (asked of all 5-15s).
- Social networking – relates to going to social networking websites like Facebook, Bebo, MySpace, Hi5 or Twitter (asked of all 5-15s).

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[37] These activities in no way represent an exhaustive list of all the potential activities that children can undertake online.
[38] Some types of use include all 5-15s, some include fewer activities for 5-7s, some do not include 5-7s.

- Avatar sites – relates to going to websites where users can create or play with a character the online world, like Club Penguin, Moshi Monsters, Habbo, Stardoll or Gaia (asked of all 5-15s).
- Games – relates to playing games on websites or online (asked of all 5-15s).
- Information – relates to general surfing/ browsing/ looking around the internet (asked of all 5-15s), going to sites where people can add or change information, like blogs or sites like Wikipedia (not asked of all 5-7s).
- Watch audio-visual content – relates to watching or downloading clips or whole TV programmes or films (asked of all 5-15s), watching or downloading videos made by people/ the general public, likeYouTube (not asked of 5-7s), watching or downloading music videos (not asked of 5-7s).
- Other communication – relates to sending or receiving emails (asked of all 5-15s), Instant Messaging (asked of all 5-15s), making or receiving telephone calls using a webcam over the internet using services like Skype (not asked of 5-7s).
- Music – relates to downloading or playing music (asked of all 5-15s).
- News – relates to going to sites about news and what is going on in the world (not asked of 5-7s).
- Radio – relates to listening to radio over the internet (asked of all 5-15s).
- Transactions – relates to buying things online or selling things online (not asked of 5-7s).

Younger children are most likely to use the internet for games, while older children are most likely to use it for homework or social networking

Figure 27[39] shows the proportion of internet users who make each type of use of the internet at least weekly[40].

Among 5-7s, games is the most commonly mentioned internet activity carried out at least weekly (42%), followed by schoolwork/ homework (32%) and avatar sites (18%). Among 8-11s, schoolwork/ homework is the most commonly-mentioned internet activity carried out at least weekly (66%), followed by games (51%) and then information (39%). Among 12-15s, schoolwork/ homework is the most commonly-mentioned internet activity (75%), followed by social networking (72%), and information (65%).

Internet users aged 12-15 are more likely than 8-11s to carry out seven of the 11 types of use at least weekly. For games, news and transactions, the incidence of weekly use is comparable for the two age groups. 12-15s are less likely to use the internet at least weekly for avatar sites compared to 8-11s (11% vs. 32%).

Six of the 11 types of use include all internet users aged 5-15. Four of these show an increase in weekly use as children get older: schoolwork/ homework, social networking, music and radio. But while 8-11s are more likely than 5-7s to use the internet for games at

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[39] Since 2010 the wording used for some of the internet activities has been amended, and some new activities have been added. As a result Figure 27 does not show comparable findings from previous years. Analysis relating to changes over time in those activities undertaken online at least weekly is included in the subsequent section.

[40] As noted in the list of types of use shown above, some of the ten types of use include fewer activities for 5-7s than for 8-11s and 12-15s, and some do not include any activities for 5-7s. This is shown within Figure 27 with a * where fewer activities for 5-7s are included and a ** where no 5-7s are included. The analysis by socio-economic group within Figure 27 focuses on children aged 8-15 only because of these 'gaps' for 5-7s for some types of use.

least weekly (51% vs. 42%), the incidence of games is no higher among 12-15s than among 8-11s (46% vs. 51%). The same is true for avatar sites; 8-11s are more likely than 5-7s and 12-15s to use the internet for avatar sites at least weekly (32% vs. 18% of 5-7s and 11% of 12-15s).

Among 5-7 year olds, girls are more likely to watch audio-visual content online (7% vs. 2%), while among 8-11s, girls are more likely to use the internet for schoolwork/ homework (71% vs. 61%). There are more gender differences among 12-15s, most of which relate to higher use, at least weekly, among girls: for social networking (78% vs. 67%), other communications (65% vs. 48%) and music (53% vs. 37%). Boys aged 12-15 are, however, more likely to use the internet at least weekly for games (59% vs. 33%).

Across the different socio-economic groups, for those children aged 8-15, just one type of use differs: children aged 8-15 in DE households are less likely than all children aged 8-15 to use the internet at least weekly for homework/ schoolwork (59% vs. 71% of all 8-15s).

Figure 27: Types of use of the internet by users at least weekly, by age and socio-economic group: 2011

QC13A-S – When you're at home, do you use the internet on any type of computer, mobile phone or games player to do any of these things? (prompted responses, single coded) – PERCENTAGES SHOWN REFLECT THOSE THAT UNDERTAKE ACTIVITY AT LEAST WEEKLY * = Fewer activities for 5-7s included in this group, ** = Not asked of 5-7s
Base: Children aged 5-15 who use the internet at home (396 aged 5-7, 496 aged 8-11, 529 aged 12-15, 185 boys aged 5-7, 211 girls aged 5-7, 252 boys aged 8-11, 244 girls aged 8-11, 255 boys aged 12-15, 274 girls aged 12-15, 250 AB aged 8-15, 309 C1 aged 8-15, 194 C2 aged 8-15, 272 DE aged 8-15). Significance testing shows any differences by gender within age and between any socio-economic group and all aged 8-15.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Individual internet activities carried out

Schoolwork/ homework is the most likely internet activity to be carried out at least weekly by older children, with 5-7s more likely to play games online at least weekly

Figure 28 shows the top ten individual internet activities undertaken at least weekly by 5-15s, across those activities that were asked of all 5-15 year olds. For the seven individual activities that were also covered in the 2010 survey (excluding those marked with *), any change since 2010 is shown in Figure 28.

Among internet users aged 5-7, the incidence of each of the ten individual internet activities carried out at least weekly is unchanged since 2010. Among 8-11s, users are more now likely to use the internet at least weekly for games (51% vs. 44% in 2010) and less likely for Instant Messaging (12% vs. 18%) and emails (13% vs. 18%). Users aged 12-15 are now less likely to make three of the individual uses of the internet at least weekly: schoolwork or homework (75% vs. 86% in 2010), Instant Messaging (45% vs. 62%), and emails (33% vs. 47%).

Figure 28: Top ten internet activities carried out at least once a week, by age: 2011

QC13A-S – When you're at home, do you use the internet on any type of computer, mobile phone or games player to do any of these things? (prompted responses, single coded) – PERCENTAGES SHOWN REFLECT THOSE THAT UNDERTAKE ACTIVITY AT LEAST WEEKLY
Base: Children aged 5-15 who use the internet at home (396 aged 5-7, 496 aged 8-11, 529 aged 12-15). Significance testing shows any change between 2010 and 2011.
Please note, we cannot make a comparison with 2010 for the three activities shown with *
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Figure 29 shows the top ten individual internet activities ever undertaken by 5-15s, of those activities that all 5-15 year olds were asked about. The top four weekly activities shown in Figure 28 also feature as the top four activities ever undertaken by 5-15s: schoolwork or homework, playing games, general surfing/ browsing and going to social networking websites. While emailing and visiting a TV channel's or TV programme's website are relatively unlikely to be undertaken weekly (at positions 8 and 9), they are more likely to have *ever* been undertaken (at positions 5 and 6).

Among internet users aged 5-7, the incidence of each of the ten individual internet activities ever carried out is unchanged since 2010. Among 8-11s, users are more now likely to have ever used avatar websites (52% vs. 45%). Users aged 12-15 are now less likely to have ever made three of the individual uses of the internet: social networking sites (78% vs. 83%), email (68% vs. 76%) and Instant Messaging (64% vs. 76%).

Figure 29: Top ten internet activities ever carried out, by age: 2011

QC13A-S – When you're at home, do you use the internet on any type of computer, mobile phone or games player to do any of these things? (prompted responses, single coded) – PERCENTAGES SHOWN REFLECT THOSE THAT EVER UNDERTAKE ACTIVITY
Base: Children aged 5-15 who use the internet at home (396 aged 5-7, 496 aged 8-11, 529 aged 12-15). Significance testing shows any change between 2010 and 2011.
Please note, we cannot make a comparison with 2010 for the three activities shown with *
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

There has been no change in the incidence of watching/ downloading user-generated content online for 8-11s or 12-15s

With no changes compared to 2010, it remains the case that children aged 12-15 are more likely to ever watch or download user generated clips, music videos, and TV programmes[41] online, compared to 8-11s.

As in 2010, there are no differences in the likelihood of ever having undertaken each of these activities, by gender within age or by household socio-economic group.

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[41] In 2009 the question distinguished between clips and whole TV programmes or films, but since 2010 these two codes have been combined. The 2009 data have therefore also been combined to show those that responded to either of these separate questions.

Figure 30: Watching/ downloading activities ever carried out by users aged 8-15: 2007, 2008, 2009 and 2010
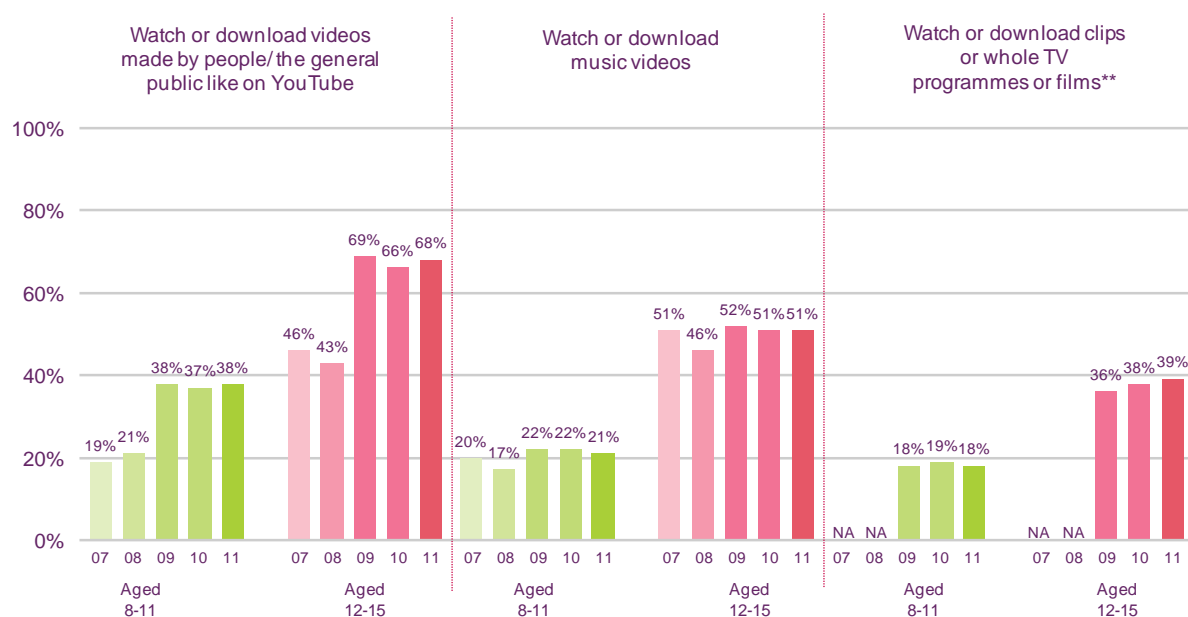
NQC13A-M – Thinking about what you do when you use the internet at home, do you use the internet to do any of these? (prompted responses, multi-coded) – PERCENTAGES SHOWN REFLECT THOSE THAT UNDERTAKE ACTIVITY EVER **in 2009 this was asked as two separate questions relating to clips and whole TV programmes or films. These questions were then combined in 2010

Base: Children aged 8-15 who use the internet at home (499 aged 8-11 in 2007, 527 aged 8-11 in 2008, 582 aged 8-11 in 2009, 597 aged 8-11 in 2010, 496 in 2011, 1045 aged 12-15 in 2007, 615 aged 12-15 in 2008, 645 aged 12-15 in 2009, 665 aged 12-15 in 2010, 529 in 2011) – significance testing shows any change between 2010 and 2011

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Creative activities undertaken online

Three-quarters of 12-15s with the internet at home have set up a social networking profile

Children aged 8-11 and 12-15 who use the internet at home were prompted with various types of creative activities associated with digital technology. For each type of activity, they were asked if they had already done it, were interested in doing it or were not interested in doing it.

The majority of 12-15s have set up a profile on a social networking site (76%) making this the most popular creative activity. This is followed by uploading photos to a website (54%). A sizeable minority of 12-15s have experience of creating an avatar that lives or plays in the online world (32%), making a short video and uploading it to a website (17%), and setting up their own website (13%).

No single activity has been undertaken yet by the majority of 8-11s, with the most popular activity for this age group being creating an avatar (45%), followed by setting up a social networking profile (28%) and uploading photos to a website (15%).

Signing an online petition has been undertaken by no 8-11s and relatively few12-15s (7%). Expressing views online about political or social issues has been undertaken by around one in twenty 12-15s (5%).

Since 2010 there are three activities that 12-15s are now less likely to say they have undertaken: uploading photos to a website (54% vs. 61%), setting up their own website (13% vs. 18%), and setting up a blog (7% vs. 12%).

In 2011, there are differences by gender, most noticeably among children aged 12-15. Boys aged 8-11 are more likely than girls of this age to say they have set up their own website (5% vs. 1%). Among 12-15s, girls are more likely than boys to have set up a social networking site profile (81% vs. 75%), with 22% of boys saying they are not interested in doing this, compared to 13% of girls. Girls aged 12-15s are also more likely than boys to have uploaded photos to a website (62% vs. 46%), with 40% of boys saying they are not interested, compared to 27% of girls. Making a short video and uploading it to a website is the only activity where the reverse is true for 12-15s: boys are more likely to have done this (21% vs. 14%), with girls being more likely to say they are not interested (69% vs. 58%).

There are few differences when comparing by household socio-economic group. Children aged 8-15 in AB households are more likely than all aged 8-15 to have created a character that lives or plays in the online world (50% vs. 38%), while children in DE households are more likely to say they are not interested (60% vs. 49%). Children in AB households are less likely than all aged 8-15 to be interested in setting up their own website (66% vs. 58%).

Figures 31 and 32 show experience of, and interest in, creative activities among 8-11s and among 12-15s.

Figure 31: Experience of creative online activities by children aged 8-11: 2009 - 2011
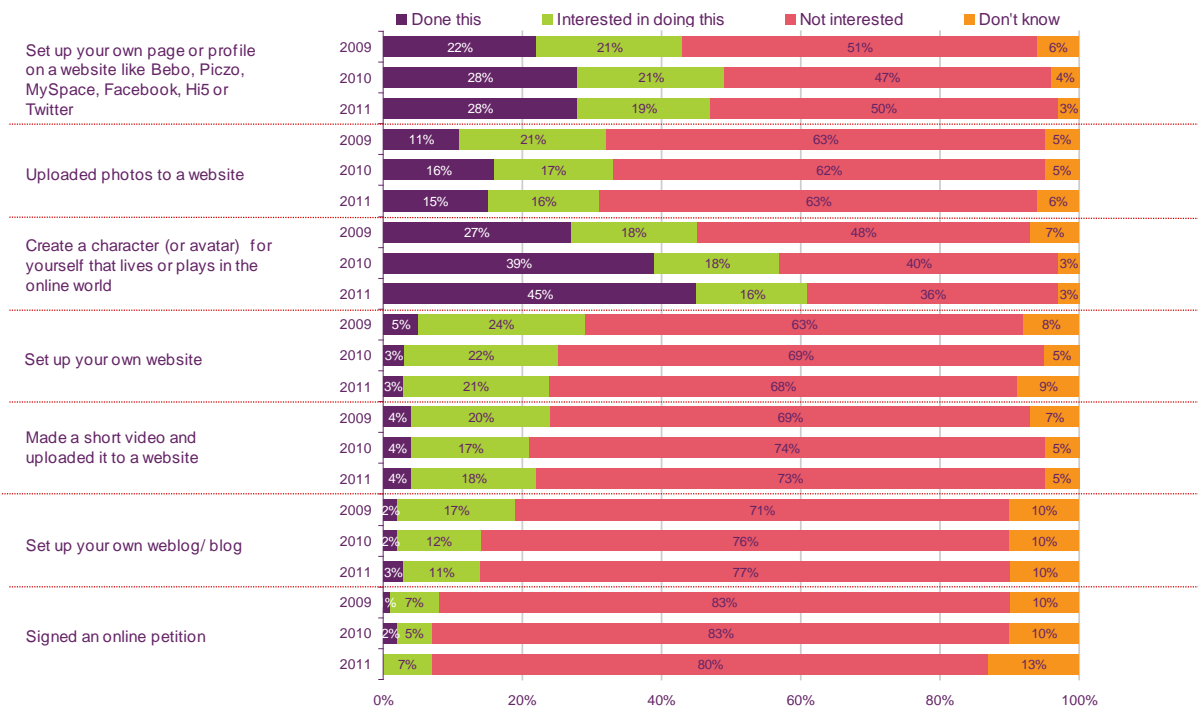
QC18 – I'd like to read out a number of things people might do. For each one, could you please tell me if you've done it, you'd be interested in doing it, or not interested? (prompted responses, single coded)
Base: Children aged 8-11 who use the internet at home (582 in 2009, 597 in 2010, 496 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Figure 32: Experience of creative online activities by children aged 12-15: 2009 - 2011

QC18 – I'd like to read out a number of things people might do. For each one, could you please tell me if you've done it, you'd be interested in doing it, or not interested? (prompted responses, single coded)
Base: Children aged 12-15 who use the internet at home (645 in 2009, 665 in 2010, 529 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Social networking profiles

Children are no more likely to have a social networking site profile in 2011

Questions relating specifically to children's use of social networking sites have been included in Ofcom's media literacy research since 2007. Figure 33 shows the proportion of children aged 5-7[42], 8-11 and 12-15 who use the internet at home and who currently have an active profile on any social networking websites[43].

Fewer than one in twenty parents of children aged 5-7 who use the internet at home (3%) say their child has a social networking site profile. Close to three in ten 8-11s (28%) say they have a profile, as do three in four 12-15s (75%).

Unlike previous surveys, there has been no increase in the proportion of children in either age group with an active profile since 2010.

When comparing by gender, girls aged 12-15 are more likely than boys of this age to have an active social networking site profile (80% vs. 70%).

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[42] In 2010 and 2011 parents of children aged 5-7 were asked whether their child had a profile on a social networking site, but all subsequent questions about children's use of social networking sites were only asked of children aged 8-11 or 12-15 or their parents.

[43] In asking children whether they had a social networking site profile, we referred to 'a website like Facebook, Bebo, MySpace, Hi5 or Twitter'.

Figure 33 also shows that around one in three aged 8-12 who use the internet at home say they have a profile on Facebook, Bebo or MySpace (34%)[44]. There has been no change in this incidence since 2010.

Figure 33: Children with an active social networking site profile, by age: 2009 - 2011

NQP29A/NQC19– Which different social networking sites do you have a page or profile on? (spontaneous responses, multi coded)
Base: Parents of children aged 5-7 and children aged 8-15 who use the internet at home (343 aged 5-7 in 2010, 396 aged 5-7 in 2011, 581 aged 8-11 in 2009, 597 aged 8-11 in 2010, 529 aged 8-11 in 2011, 645 aged 12-15 in 2009, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011, 746 aged 8-12 in 2009, 804 aged 8-12 in 2010, 655 aged 8-12 in 2011) - significance testing shows any changes between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Figure 34 shows the incidence of having an active social networking site profile, on any of Facebook/ Bebo/ MySpace, among home internet users for each year group from age 8 to age 15. While 27% of children aged 10 who use the internet at home have a profile on any of Facebook/ Bebo or MySpace, this incidence doubles to 54% among children aged 11; potentially in line with the move from primary to secondary school.

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[44] This group of children is of particular interest, as the minimum age for setting up a profile on Facebook/ Bebo/ MySpace is 13. Nearly all of these children have a profile on Facebook (98%).

Figure 34: Proportion of children who use the internet at home with an active profile on Facebook/ Bebo/ MySpace, by individual age: 2011
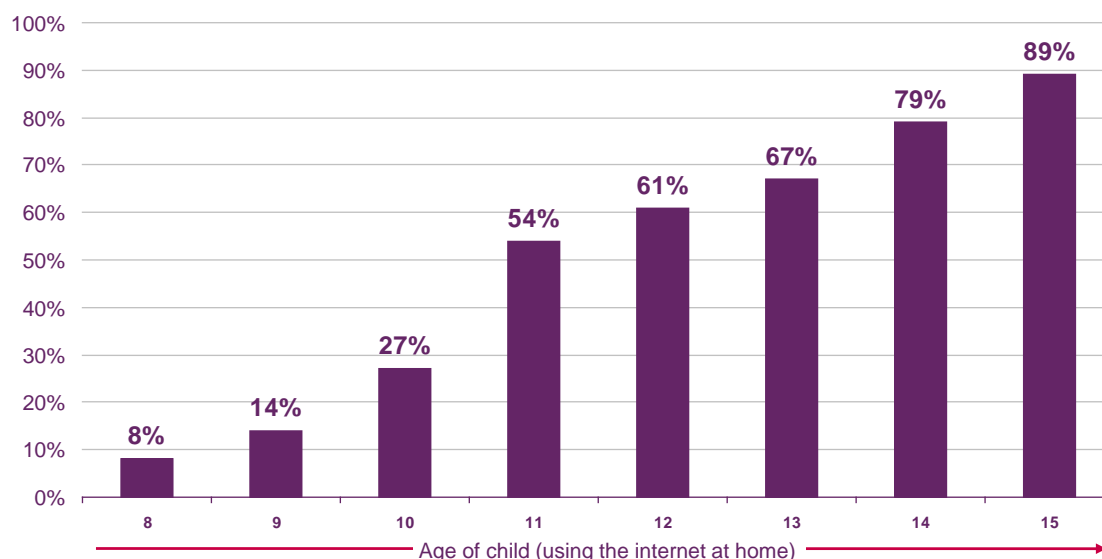
Figure 35 shows that among those with an active social networking site profile, nearly all 8-15s now use Facebook (94% for 8-11s and 97% for 12-15s).

Since 2010, those aged 12-15 with an active social networking profile are less likely to have a profile on Bebo (14% vs. 24%), and both 8-11s and 12-15s are now more likely to have Twitter profiles than in 2010 (10% and 14% respectively)[45].

As a proportion of all children (as distinct from those who use the internet at home), 2% of all 8-11s and 10% of all 12-15s use Twitter. The comparable figures for Facebook show that one quarter of all 8-11s (23%) and close to three-quarters of all 12-15s (70%) have a Facebook profile.

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[45] Twitter is not aimed at those under 13. It is not included in the subset group analysis, which focuses on the main social networking sites.

Figure 35: Social networking websites where children aged 8-15 currently have an active profile: 2009, 2010 and 2011 – among those with an active profile

NQP29A/ NQC19– Which different social networking sites do you have a page or profile on? (spontaneous responses, multi coded)
Base: Children aged 8-15 who have an active social networking site profile (129 aged 8-11 in 2009, 153 aged 8-11 in 2010, 127 aged 8-11 in 2011, 442 aged 12-15 in 2009, 507 aged 12-15 in 2010, 407 aged 12-15 in 2011) - significance testing shows any changes between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Among children who have a social networking profile, six in ten parents are friends with their child on that site

Ninety-four per cent of parents of a child aged 8-15 with an active social networking site profile are aware that their child has such a profile. Slightly more than nine in ten (92%) parents of a child aged 8-12 with a profile on Facebook/ Bebo/ MySpace are aware of their child's profile. These measures have not changed since 2010.

In 2011 parents of children aged 8-15 whose child has a social networking site profile (and who were aware of this profile) were asked whether they themselves had a profile on any of the same sites. If so, they were asked whether they were listed as a friend of the child's on any of these sites.

One in three (32%) of these parents do not have a social networking site profile, with a further 6% having a profile on a site that is not used by their child. Across all of these parents, therefore, six in ten (62%) have a profile on the same social networking site as their child.

As shown in Figure 36, the incidence of the parent being listed as a friend of their child is very high: accounting for 59% within the 62% where the parent and child use the same social networking site (or 95% of the possible cases where the parent could be listed as a friend). Responses do not vary between parents of 8-11s and 12-15s, by socio-economic group, or among those parents whose child aged 8-12 has a profile on Facebook, Bebo or MySpace.

Parents of boys aged 12-15 are more likely than parents of girls to say they use the same site but are not listed as a friend of their child (7% vs. 1%).

Figure 36: Whether parent is listed as a friend of their child on any social networking sites: 2011
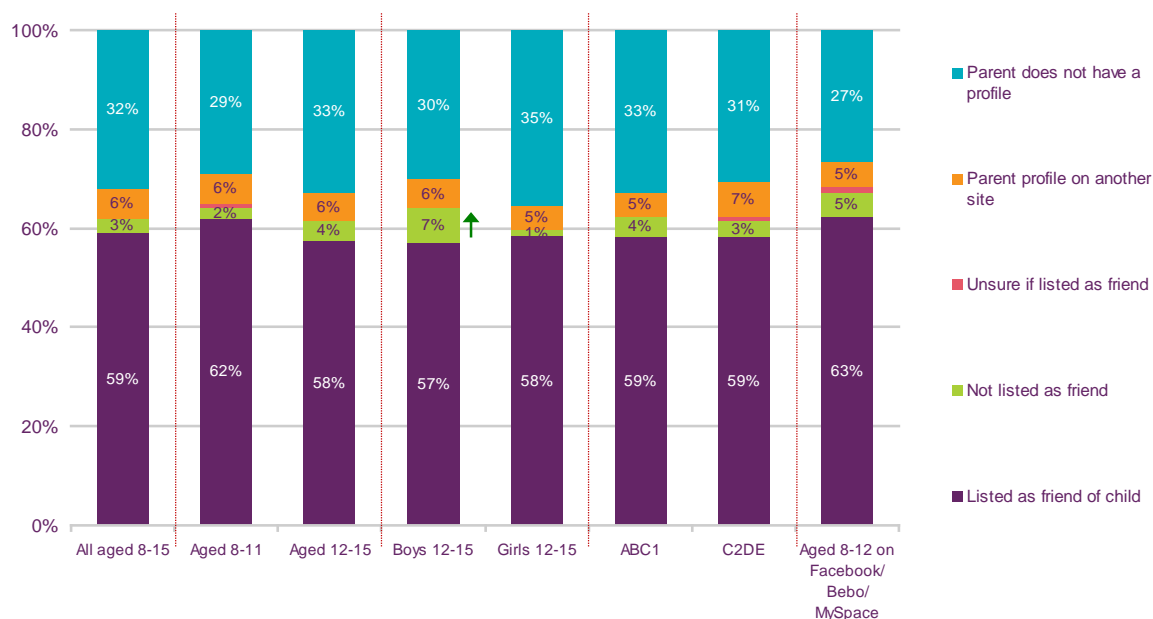
NQP29C/D/E – Do you personally have a social networking site profile?/ Do you have a profile on any of the same sites as your child?/ And are you listed as a friend of your child on any of the social networking sites that both you and your child have profiles on? (Prompted responses, single coded)
Base: Parents of children aged 8-15 whose child has a social networking site profile (538 aged 8-15, 140 aged 8-11, 398 aged 12-15, 183 boys aged 12-15, 215 girls aged 12-15, 274 ABC1, 264 C2DE, 204 aged 8-12 with a social networking profile on Facebook/Bebo/MySpace) - significance testing shows any differences by gender within age or by SEG compared to all aged 8-15
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parents of 8-15s who are aware that their child has a profile on a social networking website were asked whether they check what their child is doing online when visiting these types of sites.

As shown in Figure 37, parents of children aged 8-11 are more likely than parents of a 12-15 to check what their child is doing (86% vs. 73%) on social networking sites. There are no differences in whether checks are made by the child's gender or by the household socio-economic group.

There has been no change in the proportion of parents who make checks since 2010, for either 8-11s or 12-15s.

Eighty-seven per cent of parents of children aged 8-12 with a profile on either Facebook/ Bebo/ MySpace also check what their child is doing when visiting these sites.

Those parents who are listed as a friend of their child on any social networking site are more likely than other parents to say that they check what their child is doing when visiting these sites (84% vs. 64%).

Figure 37: Parental checking of social networking site activity, by age: 2009 - 2011

■ Yes, check what child is doing   ■ No, do not check what child is doing

Aged 8-11 - 2009	87% / 13%
Aged 8-11 - 2010	89% / 11%
Aged 8-11 2011	86% / 14%
Aged 12-15 - 2009	77% / 23%
Aged 12-15 - 2010	73% / 27%
Aged 12-15 2011	73% / 27%
Aged 8-12 with a profile on Facebook/ MySpace/ Bebo	87% / 13%
Parent listed as a friend on their profile	(84%) / 16%
Parent not listed as a friend on their profile	64% / 36%

0% 20% 40% 60% 80% 100%

NQP29B – Do you tend to check what they are doing online when they are visiting these types of sites? – NB QUESTION WORDING CHANGED IN 2010 – In 2009 it asked about visits to sites that can be used to 'chat to other users'
Base: Parents of children aged 8-15 who are aware their child has a social networking site profile/ whose child visits sites that can be used to chat to other users (255 aged 8-11 in 2009, 171 aged 8-11 in 2010, 140 aged 8-11 in 2011, 440 aged 12-15 in 2009, 499 aged 12-15 in 2010, 398 aged 12-15 in 2011, 204 aged 8-12 with a profile on Facebook/ MySpace/ Bebo, 128 with a profile on Facebook/ MySpace/ Bebo and parent listed as a friend, 76 with a profile on Facebook/ MySpace/ Bebo where a parent is not listed as a friend, 292 parents of children aged 8-15 who are listed as a friend on their child's social networking site profile, 203 parents of children aged 8-15 who are not listed as a friend on their child's social networking site profile) – significance testing shows any differences between 2010 and 2011 and between parents who are and are not listed as friend
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Social networking activities

Compared to 2010, children aged 8-15 with a social networking site profile are less likely to talk to people who are not directly known to them

Children aged 8-15 with an active social networking site profile were prompted with a list of activities that they could possibly undertake when visiting these types of website.

Nearly all 8-11s (96%) say they use these types of sites for contact with friends or family and a similar proportion of 12-15s say the same (97%).

Around one in ten 8-11s (9%) make contact with friends of friends, compared to 20% of 12-15s. Fewer than one in twenty aged 8-11 (2%) say they talk to people that they have not had contact with in person/ face-to-face. 8-11s are also less likely to listen to music/ find out about bands (17% vs. 29%), to look at or join in with campaigns or petitions (0% vs. 4%), or for contact with people they have never met in person/ face-to-face (2% vs. 8%).

There are no differences in the types of use by gender among children aged 12-15[46].

Compared to 2010, children aged 8-11 and 12-15 are now less likely to contact people who are friends of friends (9% vs. 18% for 8-11s and 20% vs. 28% for 12-15s).

Children who contact people who are friends of friends could potentially be in contact with people who are not directly known to them. By combining responses among the children who said they used social networking sites for contact with friends of friends or people they had never met in person, around one in eight 8-11s (12%) and one in four 12-15s (24%) are in contact with people who are potentially not directly known to them. Compared to 2010, however, both 8-11s and 12-15s are now less likely to use social networking sites for contact with people potentially not known to them.

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[46] Low base sizes prevent analysis by gender among 8-11s.

When looking at the responses for children aged 8-12 with an active profile on Facebook/ Bebo/ MySpace, one in seven of these children talk to people who are potentially not directly known to them (15%).

Figure 38: Types of use of social networking sites, by age: 2009, 2010 and 2011
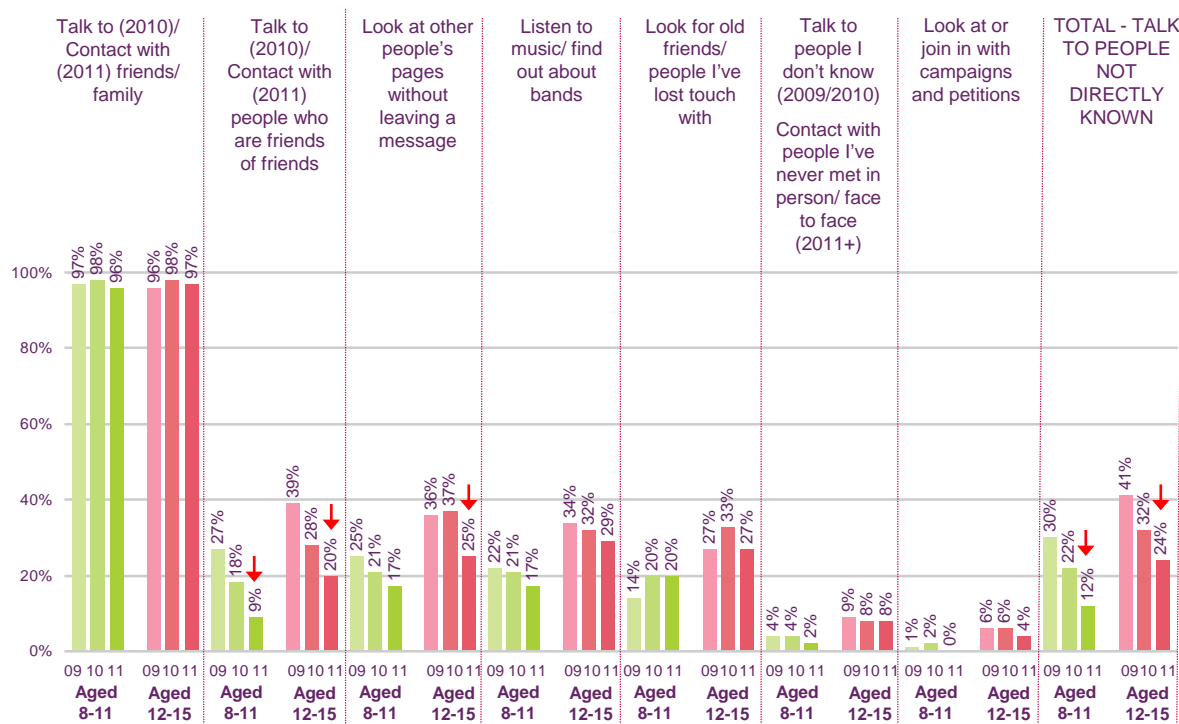
QC21 – Do you regularly use social networking sites for any of the things shown on this card? (prompted responses, single coded)
Base: Children aged 8-15 who have a social networking site profile that is currently active (129 aged 8-11 in 2009, 153 aged 8-11 in 2010, 125 aged 8-11 in 2011
442 aged 12-15 in 2009, 507 aged 12-15 in 2010, 403 aged 12-15 in 2011) - significance testing shows any changes between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Knowledge and understanding of media among 8-15s

This section looks at the extent to which mainly older children (aged 8-15) understand their media environment. It looks at children's confidence in using media, and assesses their understanding of different types of television and online content, their understanding of how search engines operate and whether they restrict access to their social networking profiles.

It also looks at their opinions about downloading content, about posting personal information online and the types of checks they make when visiting new websites. It examines children's preferences for learning about digital technology and their experience of this type of learning through school.

Due to potential comprehension issues, some of these questions were not asked of the youngest children (aged 5-7).Some of them were asked of children aged 8 -11, and all of the questions were asked of children aged 12-15.

Key findings

- 8-11s and 12-15s differentiate between the truthfulness of different types of television content and also between different types of online content.

- Close to half (45%) of 12-15s who ever use search engines make some type of critical judgement about search engine results, thinking that some of the sites returned will be truthful and some won't be. One in three (33%) believe that information on a website listed by a search engine must be truthful. Both of these measures are unchanged since 2010.

- Six in ten internet users aged 8-15 (59%) say only visit websites they have visited before, in most weeks. This is more likely among 8-11s (68%) than among 12-15s (51%). Since 2010, internet users aged 12-15 are more likely to make certain checks when visiting websites that are new to them, but the overall extent of making any checks is unchanged, at 63%.

- While most 8-15s with a social networking site profile say their profile can only be seen by their friends and no one else, a substantial minority of 8-11s (17%) and 12-15s (28%) have a profile which is either open to anyone, or open to friends of friends, so potentially open to people not directly known to them. This is more likely among boys aged 12-15 than girls (33% vs. 23%).

- 12-15s who use the internet are more inclined to share photos about being out with friends (25% say they are happy to share with friends of friends or people they don't know) or information online about what they are doing (19%), than they are to share personal details such as their home address (7%).

Critical understanding of television content

Children feel able to differentiate between the truthfulness of different types of television content

Children aged 8-11 and 12-15 who watch television at home were asked, for various genres of television programmes, whether they believed that what they were watching reflected a true picture of what really happened. The aim of these questions was to understand whether they accepted television content at face value or applied some degree of 'critical understanding' to filter the information shown in such programmes.

Children were asked whether they felt that reality TV programmes (like *X-Factor*)[47], TV documentary programmes (like wildlife programmes) or news programmes (like *Newsround*) showed a true picture of what really happened.

The results are shown in Figure 39[48]. Children in both age groups are more likely to believe that documentary or news programmes show a true picture of what really happened.

While a sizeable minority of 12-15s (44%) say that reality TV programmes do not give a true picture of what really happened, considerably fewer 8-11s give this response (28%). Those aged 8-11 are more likely than 12-15s to say that they give a true picture of what really happened (51% vs. 40%) and are more likely to be unsure (21% vs. 16%).

There are no differences in the type of response given between 8-11s and 12-15s with regard to TV documentary shows, although it is more common for 12-15s to say that news programmes do not show a true picture of what really happened (10% vs. 6%).

Boys aged 12-15 are more likely than girls aged 12-15 to be unsure as to whether reality TV programmes show a true picture of what really happened (20% vs. 12%). There are no other differences by gender for these questions.

There are some differences by household socio-economic group. Children aged 8-15 in AB households are more likely than all 8-15s to say that reality TV programmes do not show a true picture of what really happened (44% vs. 36%). Children in AB households are also less likely to be unsure as to whether documentary programmes show a true picture (6% vs. 11%) while children in DE households are more likely to be unsure (16% vs. 11%).In addition, children in DE households are less likely to say that documentary programmes give a true picture of what really happened (75% vs. 82%).

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[47] In previous years the example of a reality TV programme mentioned to children was *Big Brother*.
[48] The data shown in Figure 39 for both age groups exclude those children who said they do not watch each type of television programme.

Figure 39: Children's belief in television content, by genre: 2011
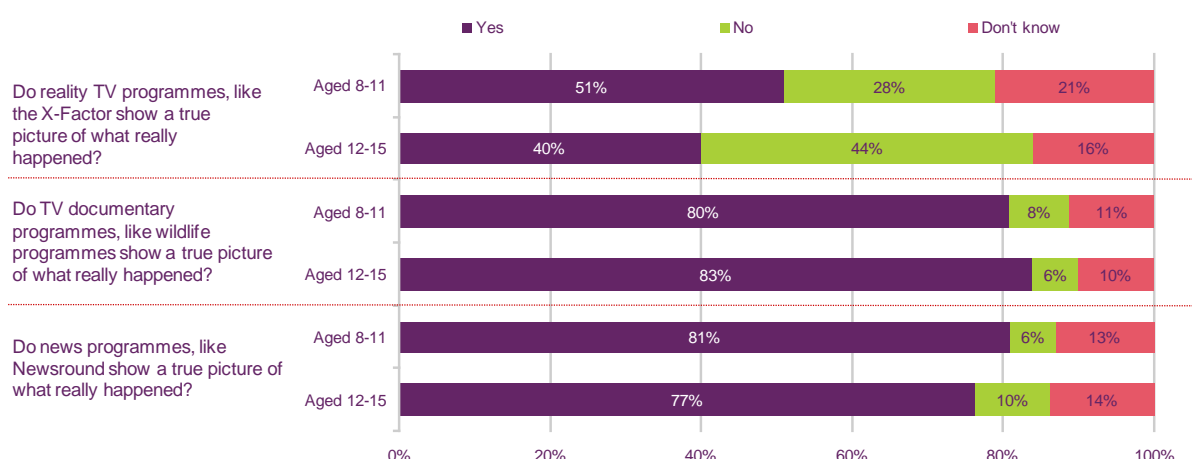
QC4B-D– Here are some questions about how you feel about TV. Could you give me a Yes or No for each one please? (spontaneous responses, single coded)
Base: Children aged 8-15 who watch TV at home (Base varies) - NB EXCLUDES THOSE WHO DO NOT WATCH EACH TYPE OF PROGRAMME – Significance testing shows any difference between those aged 12-15 who are aware how search engine operates and all aged 12-15
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

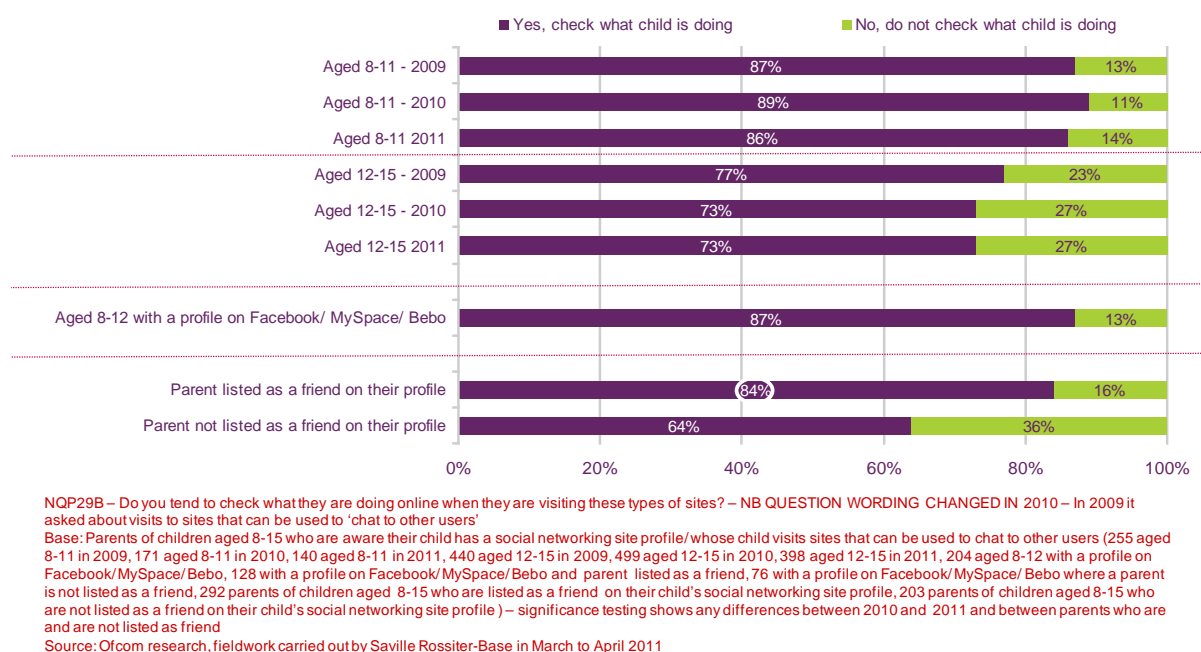## Critical understanding of online content

8-15s apply a level of 'critical understanding' regarding the truthfulness of online content

Children aged 8-15 who use the internet at home were asked how frequently they visited certain types of websites. Children who had ever visited four particular types of websites: those used for schoolwork/ homework, those used for news purposes, those where user-generated content is posted (such as blogs or sites like Wikipedia) and social networking sites, were asked whether they believed that all of the information, most of the information or some of the information on these types of site was true.

Around nine in ten 8-11s (87%) and 12-15s (92%) who use the internet at home have ever visited websites for schoolwork/ homework. Those aged 12-15 are more likely than those aged 8-11 to believe that all or most of the information on these websites is true (88% vs. 83%).There are no differences by gender or by household socio-economic group. Since 2010, children aged 12-15 are now more likely to feel that all the information shown on websites used for schoolwork/ homework is true (42% vs. 31%) and less likely to believe that most is true (46% vs. 57%).

Around one in five 8-11s (22%)[49] and just over one in three (36%) 12-15s who use the internet at home have ever visited sites about news and what is going on the world, and close to four in five 12-15s (78%) believe that all or most of the information is true. There are no differences in response by gender or by household socio-economic group. Since 2010, children aged 12-15 are now less likely to believe that most of the information is true (48% vs. 61%) and more likely to believe that some of the information is true (16% vs. 9%).

One in five (19%) 8-11s[50] and two in five12-15s (41%) who use the internet at home say they have ever visited sites where people can add or change information, like blogs or sites like Wikipedia. 12-15s are much less likely to feel that all or most of the information on these types of sites is true (48%), compared to sites used for homework (88%) or news sites

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[49] It is not possible to show data for 8-11s due to the low base of respondents.
[50] It is not possible to show data for 8-11s due to the low base of respondents.

(78%). There are no differences in response by gender or by socio-economic group, and there has been no change in attitudes among 12-15s since 2010.

Three in ten 8-11s (28%) and close to four in five 12-15s (78%) who use the internet at home have ever used the internet to visit social networking sites. 12-15s are no more likely than 8-11s to believe that all or most of the information on social networking sites is true (33% for 8-11s and 35% for 12-15s). There are no differences in response by gender, or by socio-economic group. Since 2010, children aged 12-15 are now less likely to believe that most of the information is true on social networking sites (27% vs. 34%).

Figure 40: Children's belief in websites used for information and news purposes, by age: 2010 and 2011

QC14B/C/A/D– When you use the internet to visit [TYPE OF WEBSITE] Do you believe that all of the information you see is true, most of it is true or just some of it is true? (prompted responses, single coded) – Where data is not shown for children aged 8-11, this is because of low effective sample sizes
Base: Children aged 8-15 who use the internet to visit relevant websites (VARIABLE BASE) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Critical understanding of search engines

Slightly more than two in five 12-15s who use search engines understand how they operate

Children aged 12-15 who ever use search engines (95% of all home internet users) were asked about the truthfulness of information that was returned by the search engine. Children were asked to say which of the following statements was closer to their opinion:

- "I think that if they have been listed by the search engine the information on the website must be truthful."

- "I think that some of the websites in the list will show truthful information and some will show untruthful information."

- "I don't really think about whether or not they have truthful information, I just use the sites I like the look of."

Slightly more than two in five children aged 12-15 (45%) make some type of critical judgement about search engine results, thinking that some of the sites returned will be truthful while others may not be. One in three 12-15s (33%) believe that if a search engine

lists information then it must be truthful, and just over one in ten (13%) don't consider the veracity of results but just visit the sites they like the look of. One in ten 12-15s (10%) are unsure.

There are no differences in any responses by gender. Children aged 12-15 in ABC1 households are more likely than those in C2DE households to believe that if the search engine has listed the results then the information on that website must be truthful (37% vs. 27%).

Figure 41: Children's understanding of results listed by search engines: 2009, 2010 and 2011
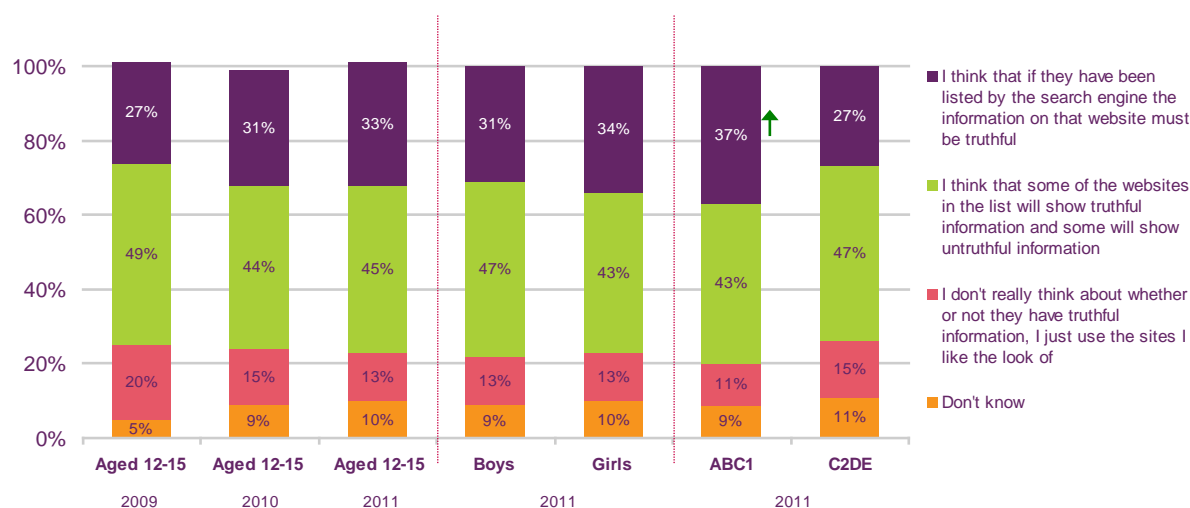
NQC24 – Which one of these is the closest in your opinion about the truthfulness of the information in the websites that appear in the results pages? (prompted responses, single coded)
Base: Children 12-15 who ever use search engines to find out about other websites or search for information (313 aged 12-15 in 2009, 620 aged 12-15 in 2010, 503 aged 12-15 in 2011, 246 boys aged 12-15, 257 girls aged 12-15, 275 ABC1, 228 C2DE) – significance testing shows any difference between 2010 and 2011 or within gender or socio-economic group Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Visiting new websites

The majority of internet users aged 8-15 only use websites they've visited previously

Children aged 8-15 who use the internet at home were asked to say whether, in most weeks, they only visited sites that they had visited before, or visited one or two sites that they hadn't visited before, or visited lots of sites they hadn't visited before.

The majority of 8-11s and 12-15s say they only visit websites they've visited before, with 8-11s more likely than 12-15s to give this response (68% vs. 51%). 12-15s are more likely than 8-11s to say they visit lots of websites they haven't visited before (8% vs. 5%) and are also more likely than 8-11s to say they visit one or two websites they haven't visited before (38% vs. 25%).

There are no differences by gender among 8-11s, although girls aged 12-15 are more likely than boys of that age to say they only visit websites that they've visited before (57% vs. 46%).

Figure 42: 8-15s' experience of visiting websites they haven't visited before: 2011

NQC16 – In most weeks when you use the internet, would you say that you….?
Base: Children aged 8-15 who use the internet at home (1025 aged 8-15, 496 aged 8-11, 529 aged 12-15, 252 boys aged 8-11, 244 girls aged 8-11, 255 boys aged 12-15, 274 girls aged 12-15, 250 AB, 309 C1, 194 C2, 272 DE - significance testing shows any differences between boys and girls by age and by socio-economic group compared to all aged 8-15
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Internet users aged 12-15 are now more likely to make certain checks when visiting websites they have not visited before

Children aged 12-15 who use the internet at home were shown a list of types of checks that could be made when visiting websites that they hadn't visited before, and were asked to say which, if any, of these things they would check.[51]

Around three in five 12-15s (63%) said they would check at least one of the things on the list. Just over one in ten (12%) 12-15s who use the internet said that they do not make any of these checks. No single check is made by the majority of 12-15s.

There is only one difference by gender: boys aged 12-15 are more likely than girls to say they would compare information across a number of sites to be sure it's correct (20% vs. 12%).

Since 2010 there has been no change in the overall incidence of 12-15s making any of these checks. They are, however, now more likely to say they make four of the nine checks that we asked about: whether it is a company that they have heard of (21% vs. 14%), whether there is a symbol to indicate a quality standard (19% vs. 13%), whether there are links to the site from another trusted site (17% vs. 12%), and who has created the site and why (14% vs. 8%).

Since 2010, 12-15s are now also more likely to say they do not visit websites they haven't visited before (25% vs. 16%).

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[51] The question was amended in 2011 to "Thinking about the websites that you visit that you haven't visited before, either when you're looking for information online or if you're buying or selling things online. Which, if any, of these things would you check?" In addition a "don't know" option was also included, which had not been included in previous years. To ensure comparability over time, those stating "don't know" in 2011 have been removed from the analysis.

Figure 43: Checks made by 12-15s when visiting websites they haven't visited before: 2009, 2010 and 2011[52]

NQC16B – Thinking about the websites that you visit that you haven't visited before either when you're looking for information online or if you're buying or selling things online. Which, if any of these things would you check? (prompted responses, multi-coded) – AMENDED QUESTION WORDING - NB in 2009 the question referred to 'new' websites, in 2009 and 2010 the question did not refer to 'when looking for information online or if you're buying or selling things online)
Base: Children aged 12-15 who use the internet at home (645 aged 12-15 in 2009, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Among those children aged 12-15 who say they visit either lots of, or one or two, new websites (47% of all home internet users), the five most popular checks are: checking to see if there is a padlock or other symbol (36%), the general appearance and look of the site (35%), how up-to-date the information is (30%), asking someone else if they have been to the website (29%) and if there is a symbol to indicate a quality standard (28%).

Social networking profile settings

Around one in twenty children aged 8-15 do not restrict access to their social networking site profile

Most children aged 8-11 and 12-15 with an active social networking profile say that their profile can be seen only by their friends (79% for 8-11s and 69% for 12-15s), while around one in twenty in each age group say it can be seen by anyone (4% for 8-11s and 5% for 12-15s).

In 2011, the questionnaire also asked whether a child's profile could be seen only by "my friends and their friends". Results show that a smaller proportion of 8-11s (13%) say this, compared to 22% of 12-15s.

By combining the responses of children who say their profile can either be seen by anyone, or seen by friends and their friends, it is possible to show the incidence of children who may be contacted through their social networking profile by people who are not directly known to them.12-15s are more likely than 8-11s to have a profile that is potentially open to people not known to them (28% vs. 17%).

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[52] In 2009, the following option was also shown to children: "If I have heard of the site on TV/ radio/ in a newspaper/ magazine". This option was removed in 2010, and the data for 2009 have therefore been adjusted accordingly.

Girls aged 12-15 are more likely than boys to have a profile that can be seen only by their friends (75% vs. 62%) while boys aged 12-15 are more likely to have profiles that are open to people who may not be directly known to them (33% vs. 23%)[53].

Children aged 8-15 in C2DE households are more likely than those in ABC1 households to have social networking site profiles that are visible to all (8% vs. 3%).

As the question wording was amended in 2011, it is not possible to look at any changes since 2010 for all of the possible responses. However, the proportions of 8-11s and 12-15s stating that their profile can be seen by anyone has not changed since 2010 for either age group (currently 4% for 8-11s and 5% for 12-15s).

Three in four children aged 8-12 with a profile on Facebook, Bebo or MySpace say their profile can be seen only by friends (74%), with around one in twenty saying their profile is visible to anyone (6%).

Figure 44: Visibility of social networking site profiles, by age: 2011

QC20 – And do you know if this profile can be seen by other people?(Prompted responses, single coded) – The option 'can only be seen by my friends and their friends' was added in 201
Base: Children aged 8-15 who have a social networking site profile that is currently active (125 aged 8-11, 403 aged 12-15, 247 boys aged 8-15, 281 girls aged 8-15, 277 ABC1, 251 C2DE, 221 aged 8-12 with a profile on Facebook/ Bebo /MySpace) – significance testing shows any difference between boys and girls and between ABC1 and C2DE
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Attitudes towards sharing personal information online

There is variation in the types of personal information 12-15s are happy to share online

In 2011, children aged 12-15 who use the internet at home or elsewhere were prompted with a list of information types that people could show on the internet and were asked how they would feel about who could see each type of information[54]. There is variation in the types of information that children aged 12-15 would be happy for people to see online. 12-15s are less inclined to want to share personal details such as their home address, their mobile number or their email address with anyone, and are more inclined to share information about how they are feeling or what they are doing, or to share photos online.

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[53] Due to base sizes it is not possible to look at any differences between boys and girls aged 8-11
[54] The response options for children at this question were amended in 2011, so it is not possible to compare responses with previous surveys.

The majority of 12-15s would either want nobody, or only their friends, to see each type of information that was asked about. Around one in twenty 12-15s would, however, be happy for anyone to see their home address (4%) or mobile phone number (4%) online.

There are some differences by gender and household socio-economic group. Girls aged 12-15 are more likely than boys to say they would want only their friends, and nobody else, to see information about how they are feeling (64% vs. 52%), photos from their holidays (67% vs. 56%), or photos from being out with friends (65% vs. 54%). Boys aged 12-15 are more likely to say they would not want anyone to see photos from their holidays (19% vs. 11%).

Children aged 12-15 in C2DE households are more likely than children in ABC1 households to say they would be happy for anyone to see online photos of them out with their friends (12% vs. 5%).

Figure 45: Personal information that children aged 12-15 are willing to share online: 2011
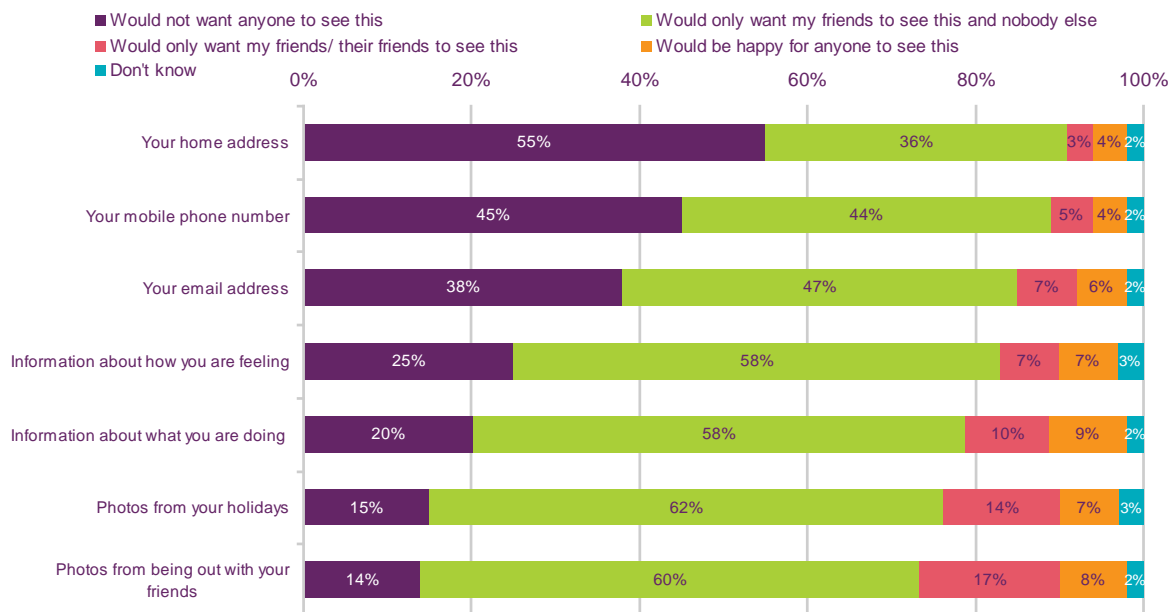
NQC26BA/BB/BC/ BD/ BE/ BF/ BG – I'm going to read out some types of information that people can show on the internet, and for each one I'd like you to say how you would feel about putting this information online (prompted responses, single coded)
Base: Those children aged 12-15 who use the internet at home or elsewhere (550 aged 12-15 in 2011)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Attitudes towards downloading music and films

Two in five 12-15s think that downloading shared copies of music and movies for free should not be illegal

Children aged 12-15 were also asked about attitudes to downloading music and films from the internet. All children were told about downloading shared copies of music and films from the internet[55] and asked whether they thought that sharing music and films in this way should be illegal[56].

Around two in five 12-15s (44%) think that downloading in this way should not be illegal, around one in five (21%) is unsure whether it should be illegal, with around one in three (35%) thinking that it should be illegal.

Results differ by gender, with girls aged 12-15 more likely than boys to believe that downloading in this way should be illegal (41% vs. 29%), while boys are more likely to say that it should not be illegal (51% vs. 37%).

Since 2010, children aged 12-15 are no more or less likely to say that sharing music or films should be illegal.

Figure 46: Attitudes towards online copyright infringement among 12-15s: 2009, 2010 and 2011
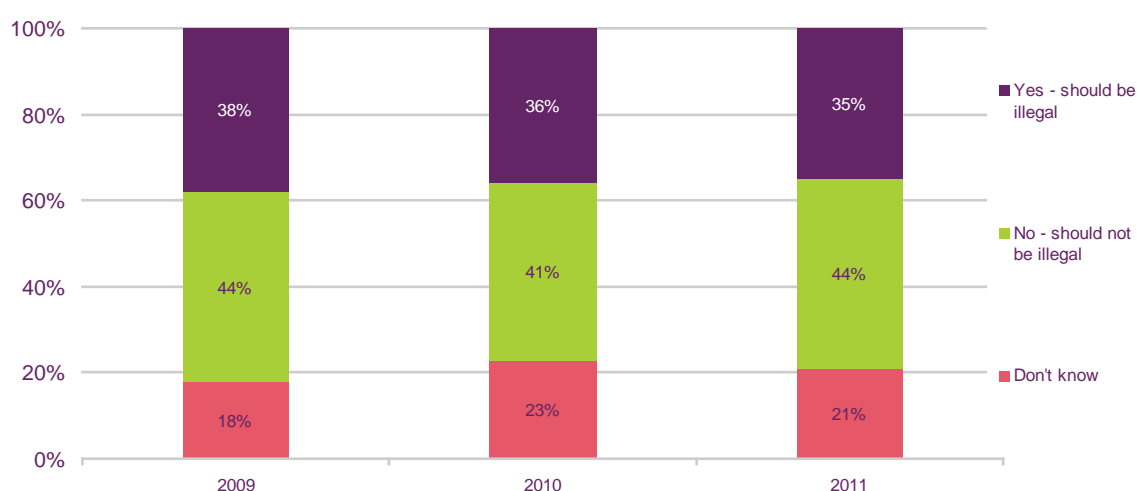
QC27 Music and films can be downloaded from the internet in two main way, by paying at an online shop like iTunes, or Tesco.com or by downloading for free from a site where someone else has shared their copy of the music or the film. Sharing content in this way is often illegal. Do you think that sharing music and films in this way should be illegal? (spontaneous response, single coded) – NB question wording amended in 2011
Base: Children aged 12-15 (781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

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[55] Children were provided with the following description: 'Music and films can be downloaded from the internet in two main ways – by paying at an online shop like iTunes or Tesco.com or by downloading for free from a site where someone else has shared their copy of the music or the film. Sharing content in this way is often illegal.'
[56] In 2010 the questions asked 'Do you think that downloading music and films for free in this way should be illegal?'

8-11s and 12-15s are more likely to receive lessons at school about the internet than they are to learn about television

Children aged 8-15 were asked whether they have any lessons at school about television or about the internet.

As shown in Figure 48, a minority of children have learnt about television in school; one in five children aged 8-11 (20%) and two in five children aged 12–15 (41%). Since 2010, there has been no change in learning about television across either age group of child.

Figure 48: Lessons about television, by age: 2005, 2007, 2009, 2010 and 2011
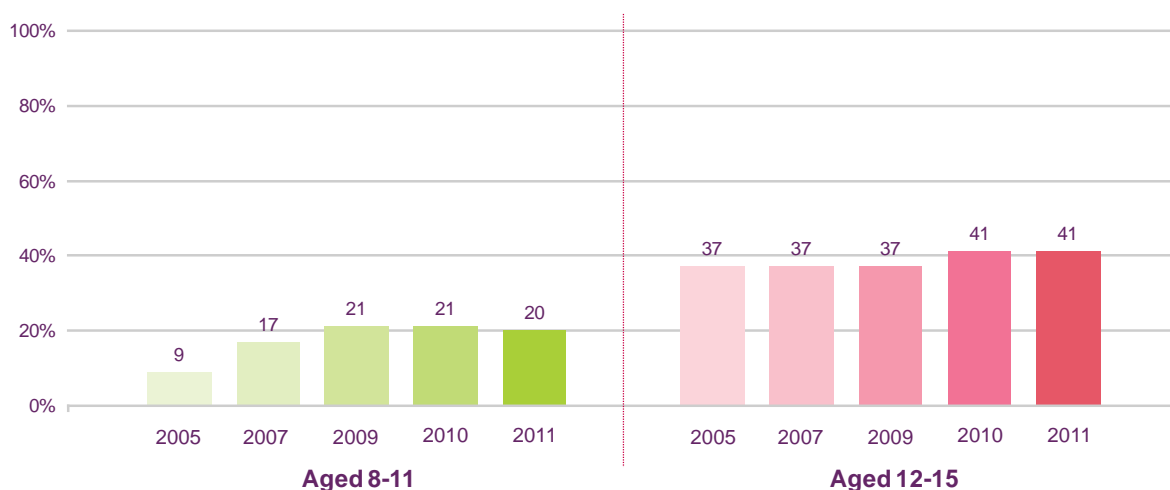
QC41/43 – Do any of your lessons at school teach you about TV ? (prompted responses, single coded)
Base: Children aged 8-15 (772 aged 8-11 in 2005, 1354 aged 8-11 in 2007, 774 aged 8-11 in 2010, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 764 aged 12-15 in 2005, 1357 aged 12-15 in 2007, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011) – significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

The majority of 8-11s (67%) and 12-15s (82%) have experience of learning about the internet at school, which, as with television, is more likely among 12-15s than 8-11s. There has been no change in learning about the internet at school since 2010 for either age group.

Figure 49: Lessons about the internet, by age: 2005, 2007, 2009, 2010 and 2011
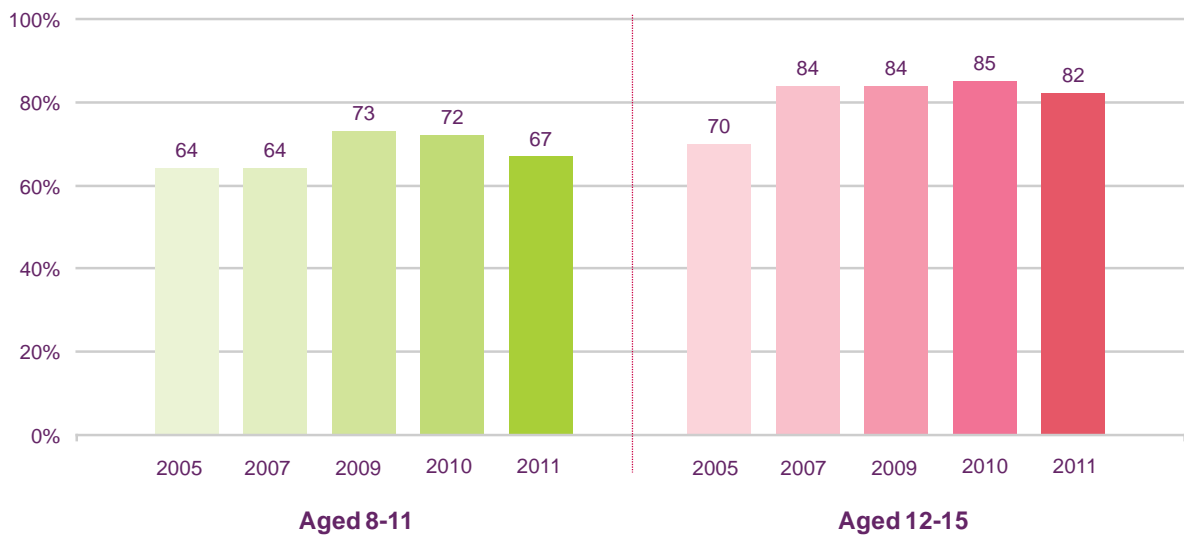
QC42/44 – Do any of your lessons at school teach you about TV / about the Internet? (prompted responses, single coded)
Base: Children aged 8-15 (772 aged 8-11 in 2005, 1354 aged 8-11 in 2007, 774 aged 8-11 in 2010, 760 aged 8-11 in 2010, 586 aged 8-11 in 2011, 764 aged 12-15 in 2005, 1357 aged 12-15 in 2007, 781 aged 12-15 in 2009, 753 aged 12-15 in 2010, 558 aged 12-15 in 2011) – significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parents' and children's concerns and attitudes

This section looks at parents' attitudes towards their children's use of television, radio and the internet, and the extent to which they have specific concerns about the internet, mobile phones and any games that their children play. It also documents children's attitudes to their use of media.

This section includes analysis from other sources, namely Ofcom research into parents' and teenagers' opinions and concerns on pre-watershed television programming (first published in September 2011).

In 2011, new questions were added to the Media Literacy Audit which asked children aged 12-15 about any negative experiences online or while using a mobile phone, their experience of risky online behaviour and 'safe' and 'risky' online activities that they may have undertaken. Therefore, no trend data are available for these measures.

Key findings

Parents' concerns

- Parents of 5-15s are more likely to be concerned about television content (31%) than internet (23%), mobile phone (16%), games (19%) and radio (5%) content. Levels of concern about television content among 5-15s are unchanged since 2010.

- In Ofcom's pre-watershed research (see annex 1) the majority (58%) of all parents surveyed said they were not concerned by the types of programming their children had watched before 9pm in the previous 12 months.

  - One third (33%) expressed some level of concern regarding the programming their children had seen before 9pm, with 9% stating they were "very concerned" and 24% "fairly concerned".

  - The top spontaneous (unprompted) concerns among all parents surveyed were: violence (20%), sexually explicit content (17%), offensive language (17%), content unsuitable for younger people/children (9%), and generally unsuitable content of a sexual nature (9%). When all mentions of anything sexual were aggregated, the total figure for all parents concerned about any sexual content was 21%.

  - Of all the parents interviewed, 11% had concerns about music videos. The area of most concern for parents was about any sexual content, which was spontaneously mentioned by 10%.

- Most parents of 5-15s trust their child to use the internet safely (81%), feel that the benefits of the internet outweigh the risks (65%), and say that their child has been taught at school how to use the internet safely (79%). Around half of parents (49%) say their child knows more about the internet than they do. Agreement increases with each age group.

- Parents are relatively unconcerned about different aspects of their child's internet use; fewer than one third say they are very or fairly concerned about their child giving out personal details to inappropriate people (28%), being bullied online/ cyberbullying (27%), who their child is in contact with online (24%), the content on the websites their child visits (23%), or any illegal downloading (14%). Parents of 12-15s have lower levels of concerns across several of these aspects than they did in 2010.

- Parents' concerns regarding the child's mobile phone use, any gaming content or who their child plays online games with are also relatively low, as in 2010.

Children's dislikes and experiences

- Across the different media that children use, dislikes about inappropriate content range widely, from 7% of 12-15s saying they dislike such content on mobile phones to one in three 8-11s (31%) saying this about TV content, a rise from 23% in 2010.

- Among 8-11s, 23% say they dislike inappropriate content online, as do 15% of 12-15s. Around one in three with a social networking profile say they dislike the fact that people sometimes get bullied on these sites, or that strangers may find out information about them.

- Two-thirds of the teenagers (66%) surveyed for the pre-watershed TV programming research (see annex 1) said they had not seen any programming on TV before 9pm in the previous 12 months that made them uncomfortable or which they had found offensive.
  - Just under a quarter of teenagers (23%) said they had seen programming that made them uncomfortable or they had found offensive before 9pm. The area of most concern mentioned spontaneously was around sexual content, mentioned by 8% of teenagers. Of the teenagers interviewed, 4% had concerns around music videos.

- Among internet users, 12-15s are much more likely than 8-11s to say that they forget about safety rules when using the internet (13% vs. 4%), and within 12-15s this is more likely among boys (16% vs. 10%).

- When asked about their own particular experience, around one in ten children aged 8-15 say they have seen anything online in the past year that is worrying, nasty or offensive, with this being more likely among 12-15s than among 8-11s (13% vs. 8%).

- One in twenty children (5%) aged 8-15 with a mobile phone say they have personal experience of being bullied through a mobile phone in the past year, although girls aged 12-15 are more likely than boys of this age to say this has happened to them (10% vs. 2%). One in ten 8-11s and one in four 12-15s say they know someone this has happened to, and again this is more likely among girls aged 12-15 (30% vs. 16%).

- Experience of being bullied online in the past year accounts for one in twenty 8-11s (5%) and 7% of 12-15s[57]. Girls aged 12-15 are more likely than boys to say they have been bullied online in the past year (10% vs. 5%) and to say they know someone this has happened to (30% vs. 19%).

- One in five of all 12-15s (20%) say they personally have had a negative experience of online or mobile phone activity in the past year, where the most likely experience is gossip being spread (13%). While personal experience does not differ by gender, girls are more likely to know someone who has been affected by gossip being spread (44% vs. 29%). Close to half of all 12-15s say they know someone who has had a negative experience of online or mobile phone activity in the past year (46%), with most of this accounted for through gossip being spread online or through a text message (36%).

- One in seven internet users aged 12-15 (14%) said they had undertaken one of four types of risky online activity in the past year; most commonly taking contact details of someone they had only met online (11%).

- One in five internet users aged 12-15 (20%) say they have in the past year deleted the 'history' records of the websites they have visited; representing half of those who say they know how to do this (40%). Girls are more likely to have done this (24% vs. 16%).

Parents' concerns across media

A minority of parents express concerns about the media content that their child has access to

Parents were asked specific questions about their child's use of different media, in order to gauge the extent to which they are concerned about their child's exposure to potentially harmful or inappropriate content. Figure 50 summarises parental concern about the content that their child encounters or engages with, to show how the level of concern varies for each medium.[58]

Parents are most likely to be concerned about television content, compared to each of the other media. Concern about television content varies by the age of the child; with parents of 5-7s more likely than parents of 8-11s and 12-15s to state that they are not concerned (67% for 5-7s vs. 58% for 8-11s and 60% for 12-15s). In 2011, concerns about television content do not vary by gender within age or by household socio-economic group.

Parents of 5-7s and 12-15s who listen to the radio at home are much less concerned about radio content than about other media, while parents of 8-11s who listen to the radio at home are as likely to be concerned about the radio content their child hears (10%) as the content accessed via the child's mobile phone (13%).

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[57] For further research on cyberbullying see Beatbullying *Virtual Violence: Protecting Children from Cyberbullying*http://www.beatbullying.org/dox/resources/reports.html and the EU Kids Online project http://www2.lse.ac.uk/media@lse/research/EUKidsOnline/EU%20Kids%20II%20(2009-11)/EUKidsOnlineIIReports/Final%20report.pdf.

[58] The comparisons are drawn between users of each medium, as opposed to being based on all parents irrespective of whether their child uses that medium.

Figure 50: Parental concerns about media content, by age: 2011[59]
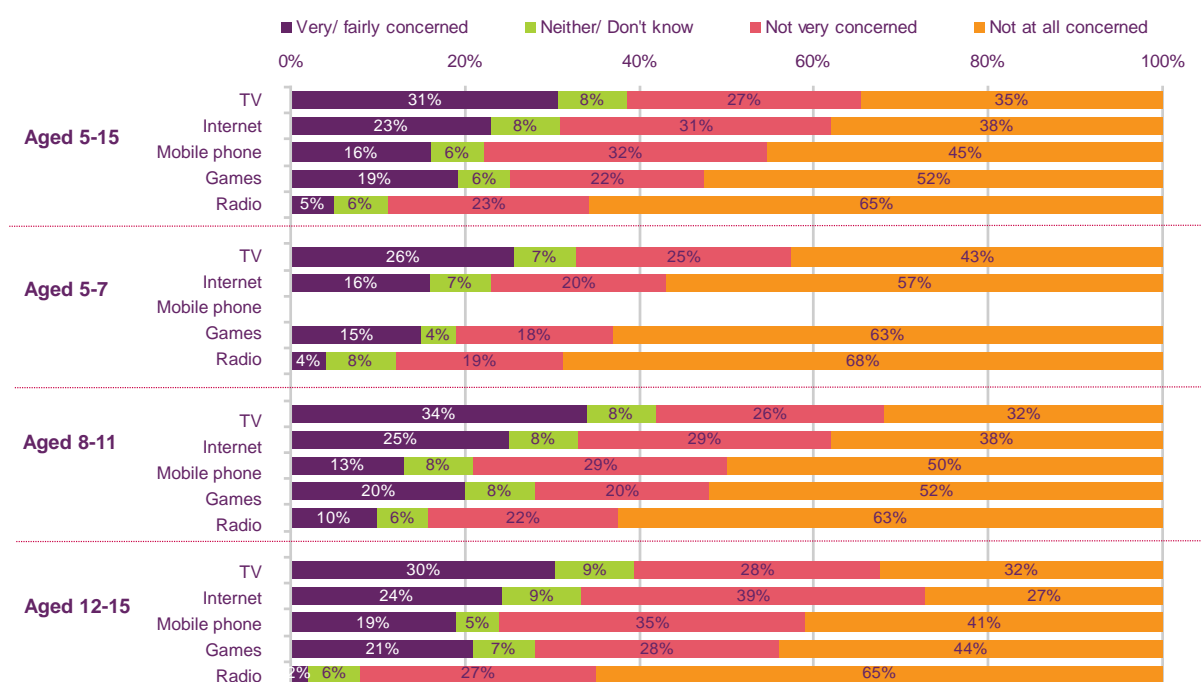
QP10A/ NQP33CA/ QP38A/ QP47A/ QP18A – Please tell me the extent to which you are concerned about these aspects of your child's TV viewing /internet use/ mobile phone use/ games playing/ radio listening ? (prompted responses, single coded)
Base: Parents of children whose child watches TV at home (1702 aged 5-15, 567 aged 5-7, 577 aged 8-11,558 aged 12-15)/ Uses the internet at home (1421 aged 5-15, 396 aged 5-7, 496 aged 8-11, 529 aged 12-15)/ Has their own mobile phone (820 aged 5-15, 274 aged 8-11, 496 aged 12-15)/ Plays games (1546 aged 5-15, 492 aged 5-7, 545 aged 8-11, 509 aged 12-15)/ Listens to the radio at home (681 aged 5-15, 183 aged 5-7, 233 aged 8-11, 265 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parental concerns about television content

> **Research into parents' and teenagers' opinions and concerns on pre-watershed television programming (see annex 1 for full report)**
>
> - In Ofcom's pre-watershed research the majority (58%) of all parents surveyed said they were not concerned by the types of programming their children had watched before 9pm in the previous 12 months.
>
> - One third (33%) expressed some level of concern regarding the programming their children had seen before 9pm, with 9% stating they were "very concerned", and 24% stating they were "fairly concerned".
>
> - The top spontaneous (unprompted) concerns among all parents surveyed were: violence (20%), sexually explicit content (17%), offensive language (17%), content unsuitable for younger people/children (9%), and generally unsuitable content of a sexual nature (9%). When all mentions of anything sexual were aggregated, the total figure for all parents concerned about any sexual content was 21%.
>
> - Soaps and films (14%) were the types of programmes that most concerned parents, followed by reality programmes (12%) and music videos (11%).

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[59] There are no data shown for children aged 5-7 for mobile phones, due to the low base of children of this age with a mobile phone.

Parents of 5-7s are now less likely to be concerned about television content

Figure 51 shows that there has been little change in parental concerns about television content since 2010. Parents of 8-11s and 12-15s are as likely to be concerned about television content as they were in 2010. Parents of 5-7s are now more likely to say they are not concerned about television content (67% vs. 62%).

Figure 51: Parental concerns about television content, by age: 2009- 2011
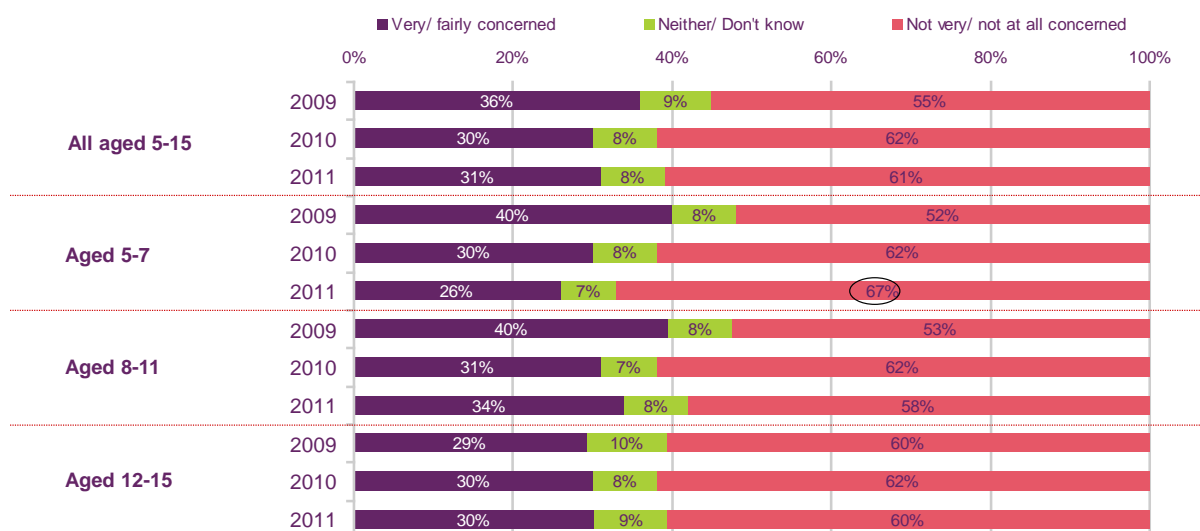
QP10A – Please tell me the extent to which you are concerned about these aspects of your child's TV viewing? (prompted responses, single coded)
Base: Parents of children whose child watches TV at home (2018 aged 5-15 in 2009, 2058 aged 5-15 in 2010, 1702 aged 5-15 in 2011, 567 aged 5-7 in 2009, 554 aged 5-7 in 2010, 567 aged 5-7 in 2011, 764 aged 8-11 in 2009, 753 aged 8-11 in 2010, 577 aged 8-11 in 2011, 751 aged 12-15 in 2010, 558 aged 12-15 in 2011) – significance testing shows any differences between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to March to April 2011

Parental attitudes towards the internet

Parents of children aged 5-15 who use the internet at home were asked about the extent to which they agreed or disagreed with a range of statements about their child's use of the internet.

Most parents trust their child to use the internet safely

Figure 52 shows that the majority of parents agree with the statement: "I trust my child to use the internet safely" (81%). Slightly more than one in ten parents across all 5-15s (12%) disagree. Parents' agreement that they trust their child increases with each age group.

In 2011, there are no differences in agreement levels by gender within age, or by socio-economic group.

Compared to 2010, parents of 5-15s who use the internet at home are now more likely to disagree that they trust their child to use the internet safely (12% vs. 8%) which is driven by an increase in disagreement among parents of 5-7s (18% vs.12%).

Figure 52: Parental agreement – "I trust my child to use the internet safely", by age: 2010 and 2011
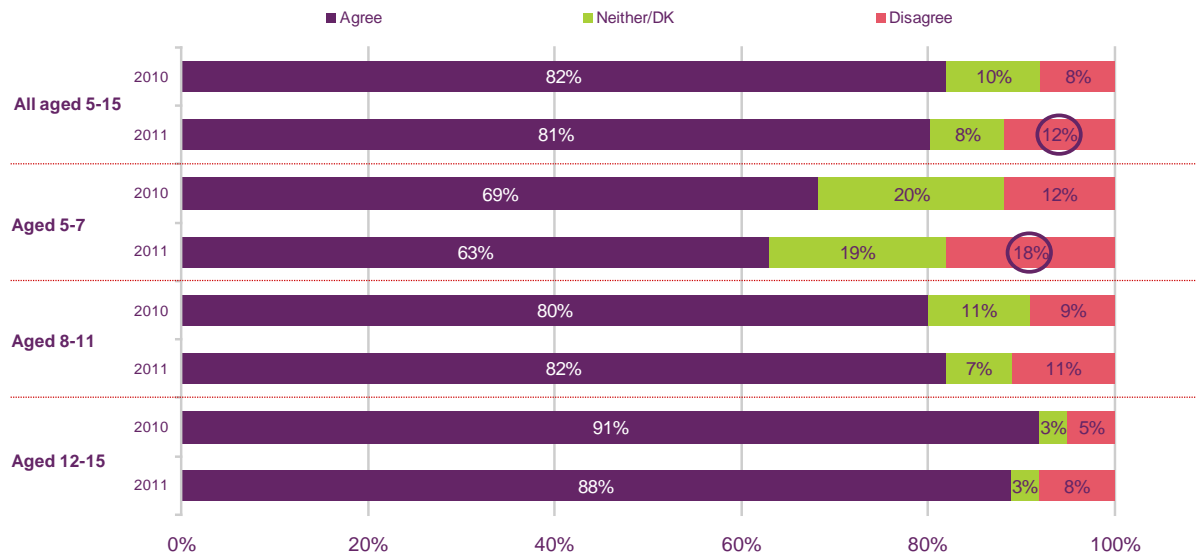
QP30B – Please tell me the extent to which you agree or disagree with these statements in relation to your child? (prompted responses, single coded)
Base: Parents of children who use the internet at home (1605 aged 5-15 in 2010, 1421 aged 5-15 in 2011, 343 aged 5-7 in 2010, 396 aged 5-7 in 2011, 597 aged 8-11 in 2010, 496 aged 8-11 in 2011, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011) - significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

The majority of parents continue to feel that the benefits of the internet outweigh the risks

The majority of parents of 5-15s also agree with this statement (65%), with parents of children aged 12-15 being more likely to agree than parents of 5-7s (69% vs. 59%). More than one in ten parents of children aged 5-15 (15%) disagree with this statement. Compared to 2010, parents of 5-15s are less likely to agree with this statement (65% vs. 71%), which is driven by a decline in agreement among parents of 5-7s (59% vs. 67%).

There are no differences in the extent of agreement by gender within age. However, compared to all parents of children aged 5-15, those in socio-economic group AB are more likely to agree (77% vs. 65%) while those in DE households are less likely to agree (56% vs. 65%).

Figure 53: Parental agreement – "The benefits of the internet for my child outweigh any risks", by age: 2010 and 2011

QP30A – Please tell me the extent to which you agree or disagree with these statements in relation to your child? (prompted responses, single coded)
Base: Parents of children who use the internet at home (1605 aged 5-15 in 2010, 1421 aged 5-15 in 2011, 343 aged 5-7 in 2010, 396 aged 5-7 in 2011, 597 aged 8-11 in 2010, 496 aged 8-11 in 2011, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011) - significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Most parents say that their child has been taught at school how to use the internet safely

Close to four in five parents of children aged 5-15 (79%) agree with this statement and parental agreement increases with each age group. One in ten parents of children aged 5-15 (11%) disagree that their child has been taught at school how to use the internet safely, with parents of 5-7s more likely to disagree (18%) than either parents of an 8-11 child (10%) or parents of a 12-15 year old (8%).

Since 2010 parents of children aged 8-11 who use the internet at home are more likely to disagree with this statement (10% vs. 6%).

Figure 54: Parental agreement – "My child has been taught at school how to use the internet safely", by age: 2010 and 2011
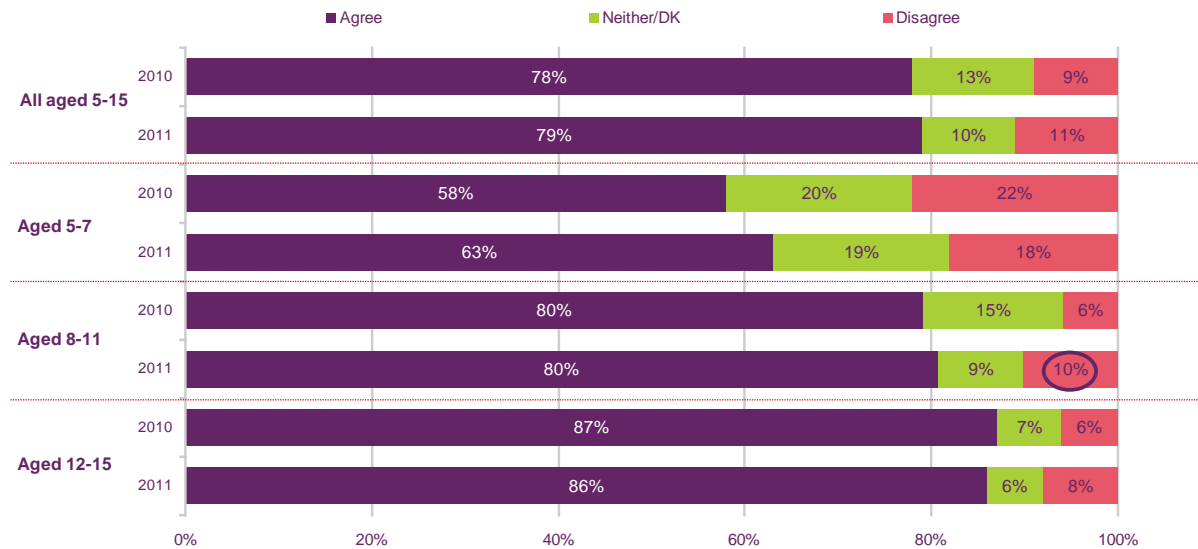
QP30C– Please tell me the extent to which you agree or disagree with these statements in relation to your child? (prompted responses, single coded)
Base: Parents of children who use the internet at home (1605 aged 5-15 in 2010, 1421 aged 5-15 in 2011, 343 aged 5-7 in 2010, 396 aged 5-7 in 2011, 597 aged 8-11 in 2010, 496 aged 8-11 in 2011, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011) - significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Almost half of parents say that their child knows more about the internet than they do

One in two parents of a child aged 5-15 (49%) agree with the statement: "My child knows more about the internet than I do". Agreement increases with each age group, with two in ten parents of a 5-7 agreeing (20%), compared to around four in ten parents of an 8-11 year-old child (43%) and seven in ten parents of 12-15s (70%).

Parents of children aged 5-15 in DE households are more likely to agree, compared to all parents (61% vs. 49%) while parents in AB households are less likely to agree (42% vs. 49%).

Figure 55: Parental agreement – "My child knows more about the internet than I do", by age: 2010 and 2011

QP30D– Please tell me the extent to which you agree or disagree with these statements in relation to your child? (prompted responses, single coded)
Base: Parents of children who use the internet at home (1605 aged 5-15 in 2010, 1421 aged 5-15 in 2011, 343 aged 5-7 in 2010, 396 aged 5-7 in 2011, 597 aged 8-11 in 2010, 496 aged 8-11 in 2011, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011) - significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parental concerns about the internet

Around one quarter of parents are concerned about different aspects of their child's internet use

Parents of children aged 5-15 who use the internet at home were asked about the extent of their concerns relating to online content, and their concerns about whom their children were in contact with online, as shown in Figures 56 and 57.

Around one in four parents of 5-15s (23%) are concerned about the content of the websites their child visits, with a similar proportion concerned about whom their child is in contact with online (24%). Concerns about online content and with whom the child is in contact are higher among parents of 8-11s (both measures 25%) and 12-15s (24% and 30%) than among parents of 5-7s (16% and 12%).

In 2011 there is only one difference in the extent of concern by the child's gender. Parents of boys aged 5-7are more likely than parents of girls of this age to be concerned (very or fairly) about the content of the websites that their child visits (20% vs. 12%).There are no differences by household socio-economic group.

Compared to 2010, parents of 12-15s are less likely to be concerned about the content of the websites that their child visits (24% vs. 33%).

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Figure 56: Parental concerns about online content, by age: 2010 and 2011

Figure 57: Parental concerns about whom their child may be in contact with online, by age: 2010 and 2011

Parents of 5-15s who use the internet at home were also asked how concerned they were about their child giving out personal information online to inappropriate people, and about their child being bullied online, as shown in Figures 58 and 59.

Figure 58 shows that close to three in ten parents (28%) are concerned that their child may be giving out personal details to inappropriate people, with parents of 8-11s (29%) and 12-15s (35%) being more concerned than parents of 5-7s (15%). However, the majority of

parents (66%) are not concerned. The same is also true for parental concern about cyber-bullying, as shown in Figure 59: two in three parents are not concerned (67%), with parents of 8-11s (28%) and 12-15s (32%) being more concerned than parents of 5-7s (14%).

There is only one difference by the child's gender: parents of 12-15 year old girls are more likely than parents of boys to be concerned about their child being bullied online (36% vs. 27%).

As with concerns about online content, compared to 2010 parents of 12-15s are less likely to be concerned about their child giving out their personal details to inappropriate people (35% vs. 42%).

Figure 58: Parental concerns about their child giving out personal details online to inappropriate people, by age: 2010 and 2011
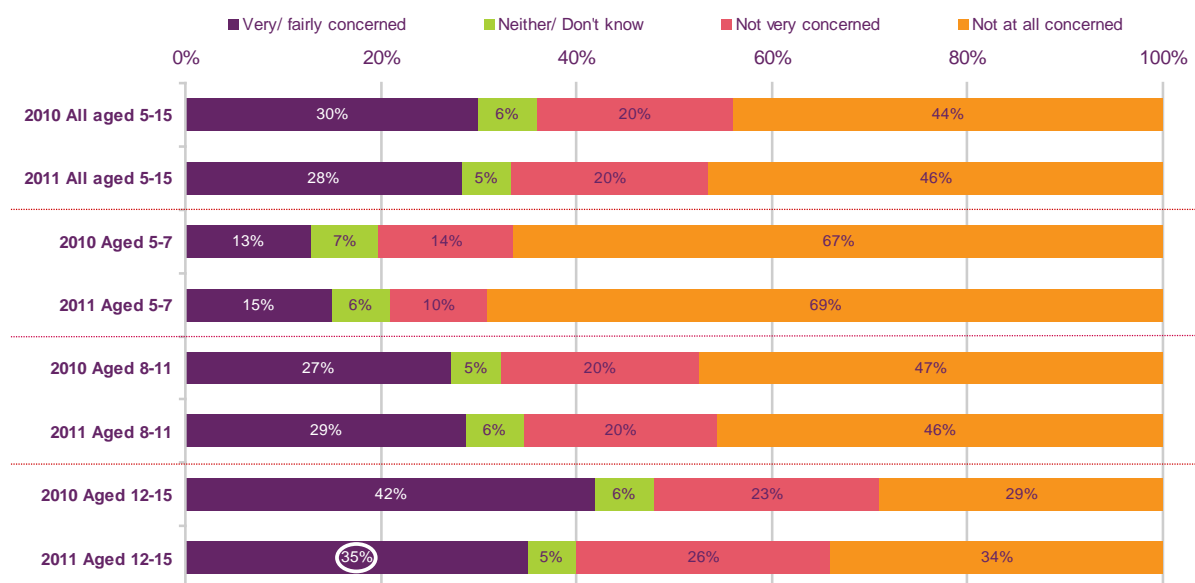
NQP33CF – Please tell me the extent to which you are concerned about these possible aspects of your child's internet use – Them giving out their personal details to inappropriate people (prompted responses, single coded)
Base: Parents of children whose child use the internet at home (1566 aged 5-15 in 2009, 1605 aged 5-15 in 2010, 1421 aged 5-15 in 2011, 340 aged 5-7 in 2009, 343 aged 5-7 in 2010, 396 aged 5-7 in 2011, 581 aged 8-11 in 2009, 597 aged 8-11 in 2010, 496 aged 8-11 in 2011, 645 aged 12-15 in 2009, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Figure 59: Parental concerns about their child and cyberbullying, by age: 2010 and 2011

NQP33CG – Please tell me the extent to which you are concerned about these possible aspects of your child's internet use – Them being bullied online/cyber bullying (prompted responses, single coded)
Base: Parents of children whose child use the internet at home (1566 aged 5-15 in 2009, 1605 aged 5-15 in 2010, 1421 aged 5-15 in 2011, 340 aged 5-7 in 2009, 343 aged 5-7 in 2010, 396 aged 5-7 in 2011, 581 aged 8-11 in 2009, 597 aged 8-11 in 2010, 496 aged 8-11 in 2011, 645 aged 12-15 in 2009, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parents of 5-15s who use the internet at home were asked how concerned they were about their child downloading content illegally/ any downloading of copyrighted material. They were also asked about their child downloading or getting viruses or other harmful software installed on the PC as a result of what they do online. Findings are shown in Figures 60 and 61.

One in seven parents (14%) are concerned about their child illegally downloading content or downloading copyrighted material, with parents of 8-11s and 12-15s (both 15%) more likely to be concerned than parents of 5-7s (8%).

Overall, close to three in ten parents (28%) say they are concerned about their child downloading or getting viruses or other harmful software installed on the PC. Concern is higher among parents of 8-11s (30%) and 12-15s (31%) than for parents of 5-7s (19%).

For both of these measures, the majority of parents in each age group are not concerned. There are no differences in the level of parental concern by the gender of the child or by the household socio-economic group.

Compared to 2010, parents of 12-15s are now less likely to be concerned about their child illegally downloading content (15% vs.24%) or about their child getting viruses or other harmful software installed on the PC (31% vs. 39%).

Figure 60: Parental concerns about their child and illegal downloading, by age: 2010 and 2011

Figure 61: Parental concerns about their child downloading viruses, by age: 2010 and 2011

Overall, across several of the aspects of online parental concern that were asked about (online content, their child giving out personal details to inappropriate people, their child illegally downloading content or copyrighted material, or getting viruses installed on the PC), parents of 12-15s are now less likely than in 2010 to be concerned.

Parental concerns about mobile phones

A minority of parents express concerns relating to their child's mobile phone use

Parents of children aged 5-15 with their own mobile phone were asked about specific concerns relating to their child's use of their mobile phone[60].

Figure 62 shows that the proportion of parents who are concerned about what their child sees or reads on their mobile phone is relatively low for each age group; accounting for 13% of parents of an 8-11 year old and 19% of parents of a 12-15 year old.

A similar proportion of parents of 8-11s(14%) and12-15s (20%) express concern about whom their child may be in contact with, as shown in Figure 62.

The concerns shown in Figure 62 do not vary among parents of children aged 5-15 with a smartphone, compared to parents of children with any mobile phone.

Figure 62: Parental concerns about mobile phone content and whom their child is in contact with via their mobile, by age: 2010 and 2011

QP38A/QP38C– Please tell me the extent to which you are concerned about these aspects of your child's mobile phone use/ What they see or read on their mobile phone/ Who they are in contact with using their mobile phone ? (prompted responses, single coded)
Base: Parents of children whose child has their own mobile phone (339 aged 8-11 in 2010, 274 aged 8-11 in 2011, 654 aged 12-15 in 2010, 496 aged 12-15 in 2011) - significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011
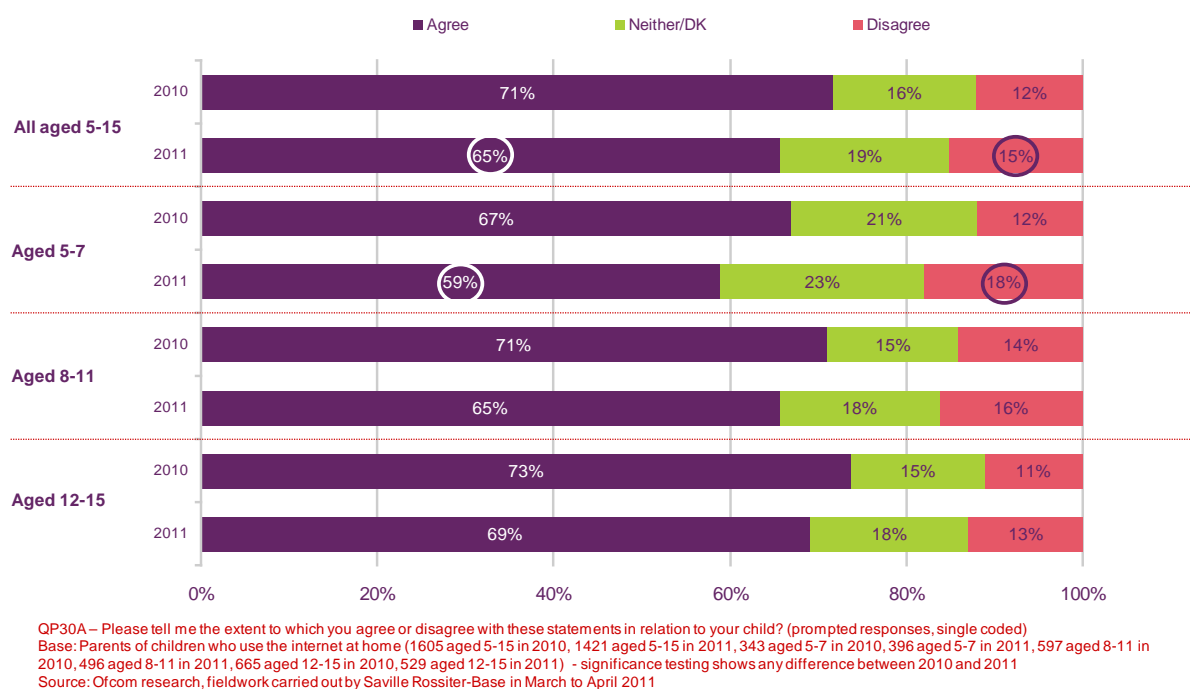
Parents of children aged 5-15 with their own mobile phone were asked about the extent of any concerns about their child being bullied via calls/ texts/ emails to their mobile phone.

Figure 63 shows that a comparable proportion of parents of 8-11s (17%) and 12-15s (22%) say they are concerned about this aspect of their child's mobile phone use. There are no differences by gender or by socio-economic group at an overall concerned/ not concerned level. There has been no change in the level of concern since 2010.

Similarly, one in five parents of 8-11s (21%) and one in four parents of 12-15s (24%) say they are concerned about their child giving out personal details to inappropriate people.

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[60] No data are shown for children aged 5-7 for mobile phones, as there were only 47 children of this age with their own mobile phone in 2010 and 50 in 2011.

However, parents of 8-11s are more likely to say they are concerned about this aspect of their child's mobile phone use than they are about the content the child sees on their mobile phone (21% vs. 13%). Parents of 12-15s are no more likely to be concerned about this aspect of their child's mobile phone use than they are about the content the child sees on their mobile phone, whom their child is in contact with, or the potential for their child to be bullied through their mobile phone.

The concerns shown in Figure 63 do not vary among parents of children with a smartphone compared to children with any mobile phone.

Figure 63 : Parental concerns about their child being bullied via calls/ texts/ emails to the child's mobile phone, and their child giving out personal details to inappropriate people, by age: 2010 and 2011
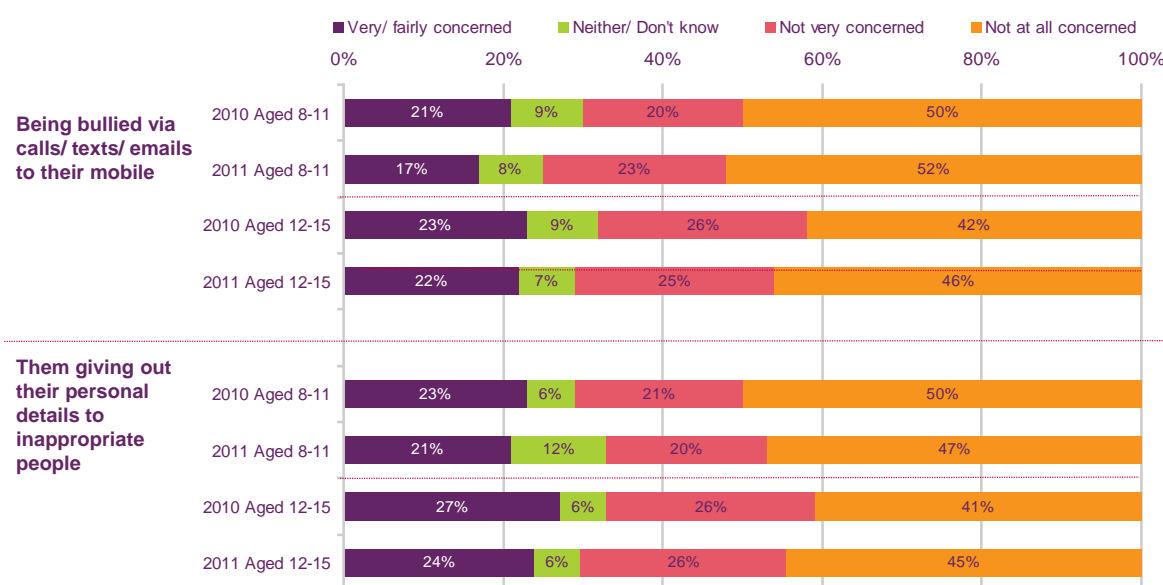
QP38E/ QP38F– Please tell me the extent to which you are concerned about these aspects of your child's mobile phone use/ Being bullied via calls /texts/ emails/ messages to their mobile phone/ Them giving out their personal details to inappropriate people? (prompted responses, single coded)
Base: Parents of children whose child has their own mobile phone (339 aged 8-11 in 2010, 274 aged 8-11 in 2011, 654 aged 12-15 in 2010, 496 aged 12-15 in 2011) - significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parental concerns about gaming

Parents of children who ever play games through a gaming device were asked how concerned they were about the content of the games that their child played, and about whom the child may be playing online games with through the games player[61].

One in five parents (19%) of children aged 5-15 whose child ever plays games are concerned about the content of the games that the child plays. Parents of 12-15s are as likely as parents of 8-11s to be concerned, but are more likely than parents of 5-7s to be concerned about this aspect of their child's game-playing (21% vs. 15%).

Given that boys in each age category are more likely to regularly play games, it is perhaps not surprising that there are some differences in parental concern by the gender of the child. Parents of boys in each age group are more likely to be concerned than parents of girls in

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[61] The question about whom their child plays online games with, through their gaming device, allowed a "not applicable" option, in case their child did not use the gaming device/ games player to game online. Those parents who answered "not applicable" have therefore been excluded from the base.

each age category (20% vs. 10% for 5-7s, 24% vs. 15% for 8-11s and 29% vs. 13% for 12-15s).

Compared to 2010, parents of 5-15s are less likely to say that they are concerned about the content of the games that their child plays (19% vs. 23%); this is driven by a decline in concern since 2010 among parents of 8-11s (20% vs. 26%).

Around one in seven parents of a 5-15 year old child (14%) say they are concerned about whom their child is playing online games with through the games player. Parents of 12-15s are as likely to be concerned as parents of 8-11s but are more likely to be concerned about this aspect of their child's game-playing than parents of 5-7s (17% vs. 10%). Parents of boys aged 12-15 are more likely to be concerned than parents of girls of this age (21% vs. 12%). There are no differences by household socio-economic group.

One in four parents (24%) of children aged 5-15 who play games online against someone who is playing elsewhere (as opposed to in the same room as them), say they are concerned about whom their child is playing online games with.

Figure 64: Parental concerns about gaming content and whom their child is gaming with through the games player, by age: 2010 and 2011
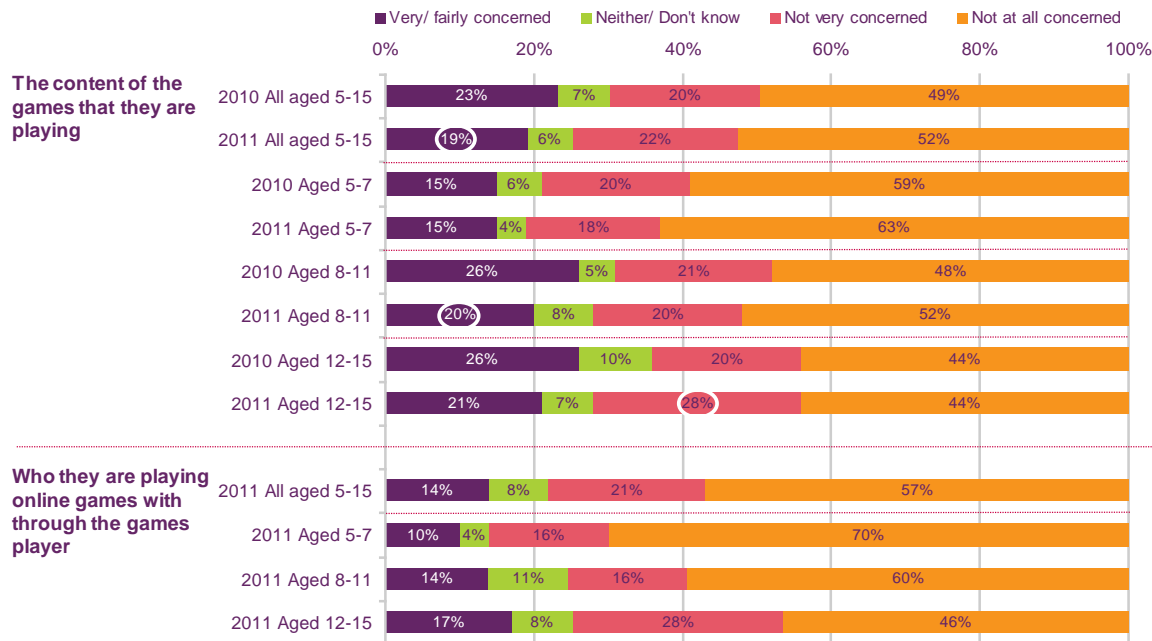
QP47A/C – Please tell me the extent to which you are concerned about these aspects of your child's games playing? (prompted responses, single coded)
Base: Parents of children whose child ever plays games (1546 aged 5-15, 492 aged 5-7, 545 aged 8-11, 509 aged 12-15)/ Parents of children whose child ever plays games - excluding not applicable responses (1010 aged 5-15, 281 aged 5-7, 361 aged 8-11, 368 aged 12-15) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Children's dislikes about different media

A sizeable minority of children dislike seeing inappropriate content across the media that they use

Parents' attitudes and concerns relating to various kinds of media are one side of the coin; the other is how children and young people feel about, and react to, different types of media content. This section examines certain dislikes about different platforms, children's opinions about different types of situation that may occur online or via a mobile phone, and what they say they would do in such situations.

Children aged 8-15 who use each of the relevant media were prompted with a list of possible things that they might not like about television, mobiles, using the internet and game-playing over the internet, and were asked to nominate which, if any, applied to them. The aim of these questions was to establish children's views in two key areas - accessing content that made them feel sad, frightened or embarrassed, and accessing content that they felt was too old for them.[62]

It is useful to remind ourselves at the outset of the extent to which children feel confident about their online activity. Nearly nine in ten (88%) of 8-15s feel that they know how to stay safe online, and 97% feel confident as an internet user.

Around one sixth of 8-11s say they dislike seeing things on television that are too old for them

For television, the most common dislike among the majority of both 8-11s and 12-15s is that there are too many adverts. Children aged 12-15 are more likely than 8-11s to dislike this (72% vs. 58%).One in four 8-11s (23%) dislike seeing things on television that make them feel sad, frightened or embarrassed; this is significantly higher than for 12-15s (14%). 8-11s are also more likely than 12-15s to dislike seeing things that are too old for them (17% vs. 9%).

Compared to 2010, 8-11s are now more likely to say they dislike seeing things that make them feel sad, frightened or embarrassed (23% vs. 17%) and to dislike seeing things that are too old for them (17% vs. 12%). As such, close to one in three children aged 8-11 (31% vs. 23% in 2010) say they have at least one of these key concerns. 12-15s are no more likely to be concerned about either of these aspects than they were in 2010 (19% vs. 15%).

Across the key dislikes, there are no differences by socio-economic group. Girls aged 12-15 are, however, more likely than boys to dislike seeing things on television that make them feel either sad, frightened or embarrassed or that they feel are too old for them (23% vs. 15%).

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[62] The aim of these questions was to establish the extent to which children may have these specific concerns about the media that they engage with. As this is a sensitive area, the questions were designed to prevent upset or distress to children by using language that focused on possible dislikes rather than actual concerns.

Figure 65: Children's dislikes about television, by age: 2010 and 2011
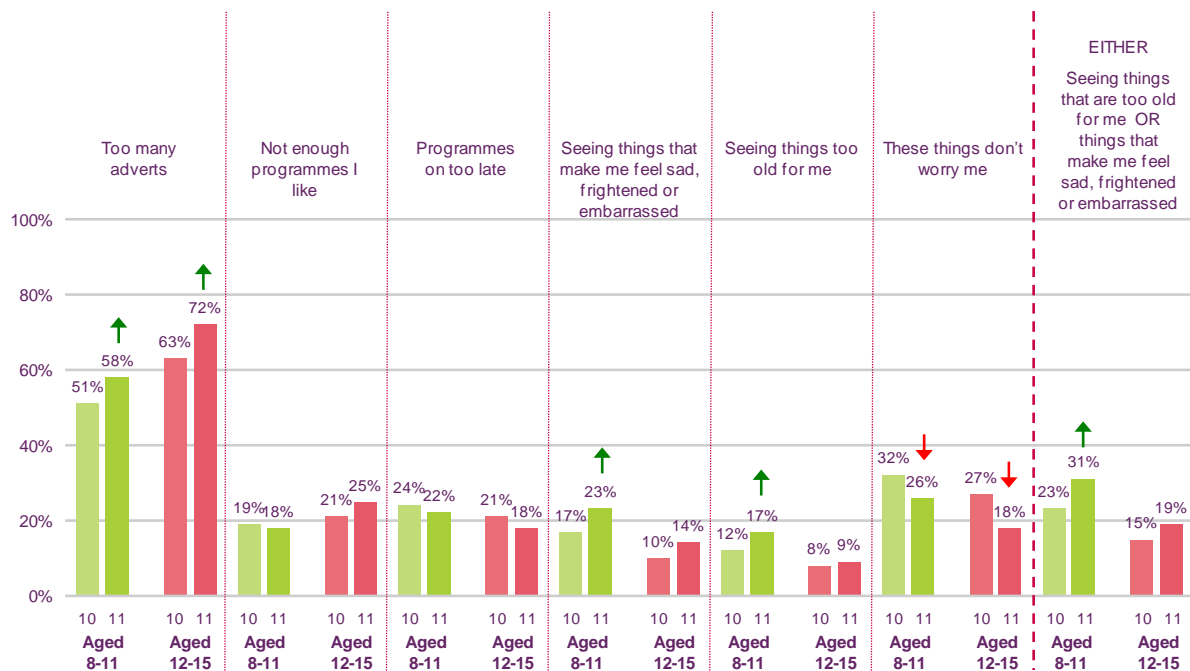
QC5 – Which of these things if any, are things you don't like about TV? (prompted responses multi-coded)
Base: Children aged 8-15 who watch TV at home (753 aged 8-11 in 2010, 577 aged 8-11 in 2011, 751 aged 12-15, 558 aged 12-15 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Research into teenagers' opinions and concerns on pre-watershed television programming (see annex 1 for full report)

- 66% of teens aged 12-17 had not seen programming on television before 9pm in the past 12 months that made them uncomfortable to watch or that they had considered to be offensive.

- Just under a quarter (23%) said they had seen programming that made them uncomfortable or they considered offensive.

- Unprompted, 7% of teens mentioned sexually explicit content as the most likely thing to make them uncomfortable or offended. This was followed by offensive language and violence (both 4%).

- Films caused the most offence or discomfort among all teens (7%), followed by soaps (6%) and reality programmes (5%). 4% of teens had concerns about music videos.

Around one sixth of 8-11 internet users say they dislike seeing things that are too old for them

Children aged 8-15 who use the internet at home were prompted with a list of seven things that they might not like about using the internet, and were asked to specify which, if any, applied to them.

Figure 66 shows that children aged 8-11 and those aged 12-15 are most likely to identify "websites that take too long to load" as the issue that they dislike the most (36% for 8-11s and 46% for 12-15s). Around one in six 8-11s dislikes seeing things that are too old for them (16%), or things that make them feel sad, frightened or embarrassed (15%). 12-15s are less likely than 8-11s to have concerns about seeing things that are too old for them (8% vs. 16%) or seeing things that make them feel sad, frightened or embarrassed (10% vs. 15%). When looking at the proportion of children that have either of these key concerns, 23% of 8-11s and 15% of 12-15s dislike seeing things online that are too old for them or things that make them feel sad frightened or embarrassed.

There are no differences across either of these key concerns by gender within age, or by household socio-economic group. Since 2010, there has been no change in the reported incidence of these key concerns among children aged 8-11 or 12-15. Since 2010, however, children aged 8-11 and 12-15 who use the internet at home are more likely to say they dislike the fact that there are too many adverts on the internet.

Figure 66: Children's dislikes about the internet, by age: 2010 and 2011

QC15 – Which of these things if any, are things you don't like about the internet?
Base: Children aged 8-15 who use the internet at home (597 aged 8-11 in 2010, 496 aged 8-11 in 2011, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011
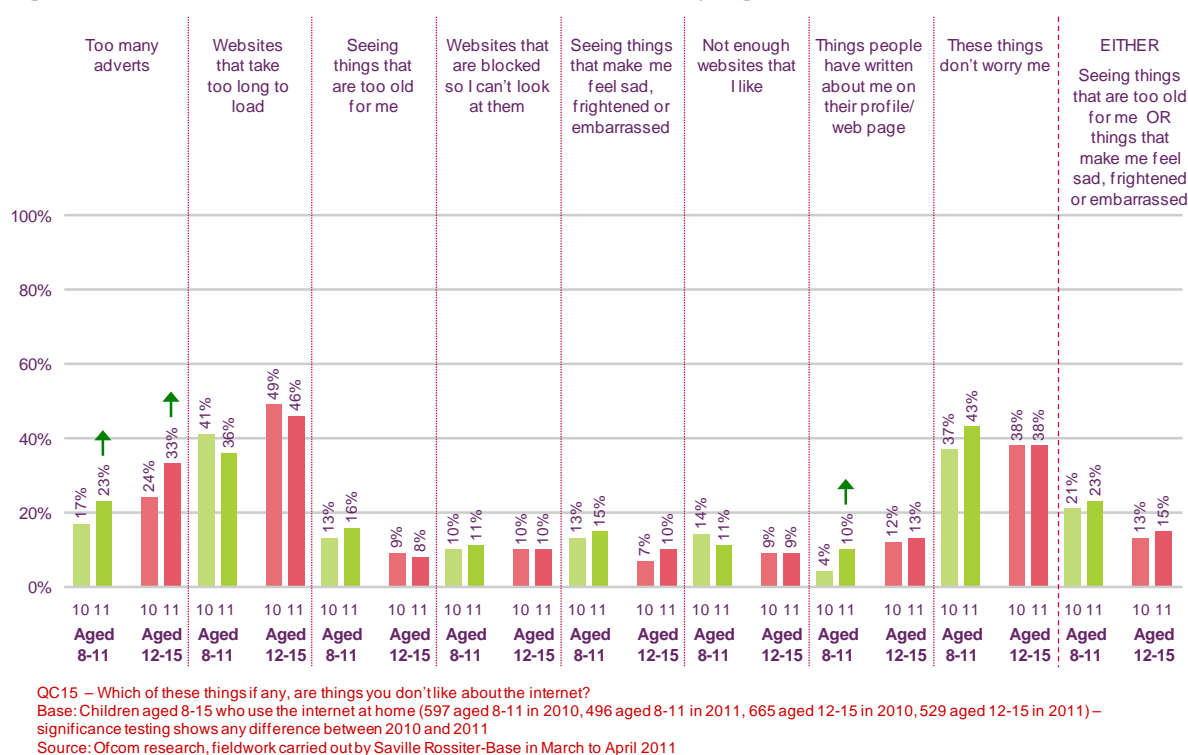
Children aged 8-11 and 12-15 with an active social networking profile on any social networking site were prompted with a list of seven things that they might dislike about social networking sites.

Figure 67shows that the most common dislikes among both 8-11s and 12-15s are either "strangers might find out information about me" (32% and 29% respectively) or "sometimes people get bullied on these sites" (32% and 33% respectively).

When comparing children aged 8-15[63] by gender, girls are more likely than boys to dislike the possibility that sometimes people can get bullied on the sites (38% vs. 27%). Boys aged 8-15 are more likely than girls to say that these things don't worry them (40% vs. 30%). There are no apparent differences between children aged 8-15 in ABC1 households and those in C2DE households[64].

There has been one change since 2010:8-11s are now more likely to say they dislike spending too much time on social networking sites (21% vs. 9%).

Figure 67: Children's dislikes about social networking sites, by age: 2010 and 2011
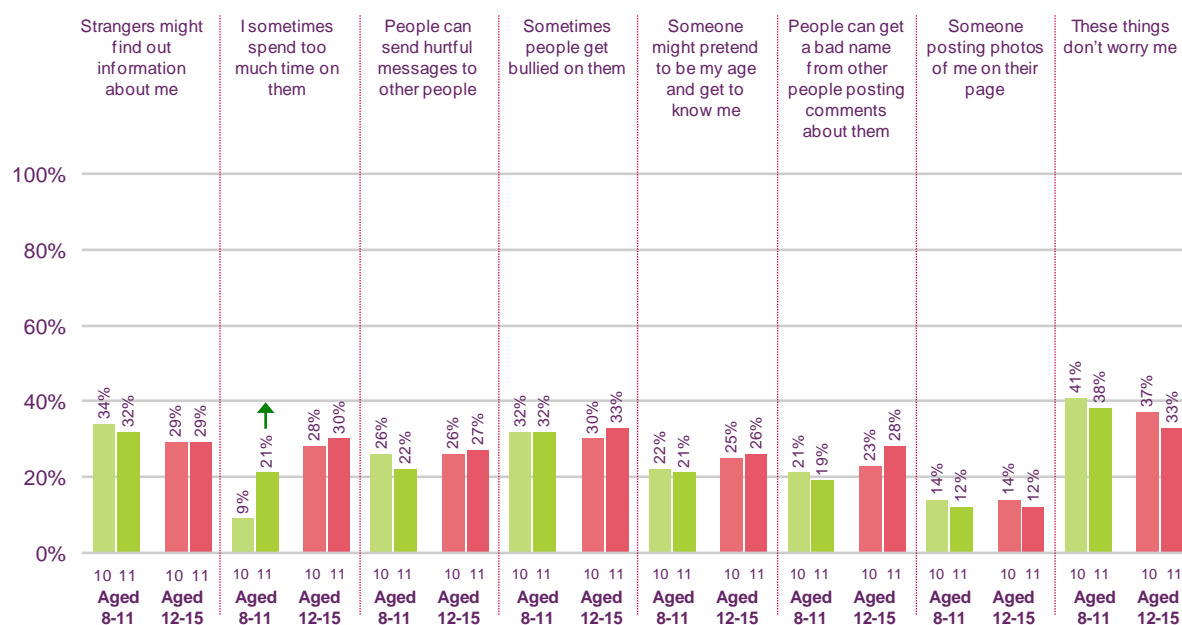
QC22 – Which of these things, if any, are things that you don't like about sites like Bebo, Piczo, hi5, Facebook or MySpace?
Base: Children aged 8-15 who have a social networking site profile that is currently active (153 aged 8-11, 507 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Around one in six children say they dislike the fact that people can send hurtful messages on their mobile phone

When looking at dislikes about mobile phones, Figure 68 shows that cost issues prevail, with four in ten 8-11s (42%) and half of 12-15s (52%) stating cost as a dislike. A similar proportion of 8-11s and 12-15s dislike the possibility that people can send hurtful messages to others (19% for 8-11s and 14% for 12-15s) or that people can sometimes get bullied via the mobile phone (16% vs. 17%). Dislikes about seeing things on their phone that are too old for them are higher for 8-11s than for 12-15s (8% vs. 4%). Around one in twenty (5% and 6%) of each group dislike seeing things on their phone that make them feel sad, frightened or embarrassed. As such, one in ten children aged 8-11 (10%) with a mobile phone have one or more of these key dislikes, as do a similar proportion of 12-15s (7%).

In 2011 there are no differences by gender, by age or by socio-economic group. Since 2010, 8-11s are more likely to be concerned about seeing things on their mobile phone that are too old for them (8% vs. 3%).

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[63] Due to base sizes it is not possible to look at 8-11s with an active social networking site profile by gender; we therefore look at all children aged 8-15 by gender.
[64] Due to sample sizes it is not possible to compare children in each of the four socio-economic groups to all children.

As in 2010, the only dislike that is more prevalent among smartphone users aged 8-15 compared to all mobile phone users is "slow access to the internet over the phone" (18% vs. 11%).

Figure 68: Children's dislikes about mobile phones, by age: 2010 and 2011

QC38 – Which of these things if any, are things you don't like about mobile phones?
Base: Children aged 8-15 who have a mobile phone (339 aged 8-11 in 2010, 274 aged 8-11 in 2011, 654 aged 12-15 in 2010, 496 aged 12-15 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011
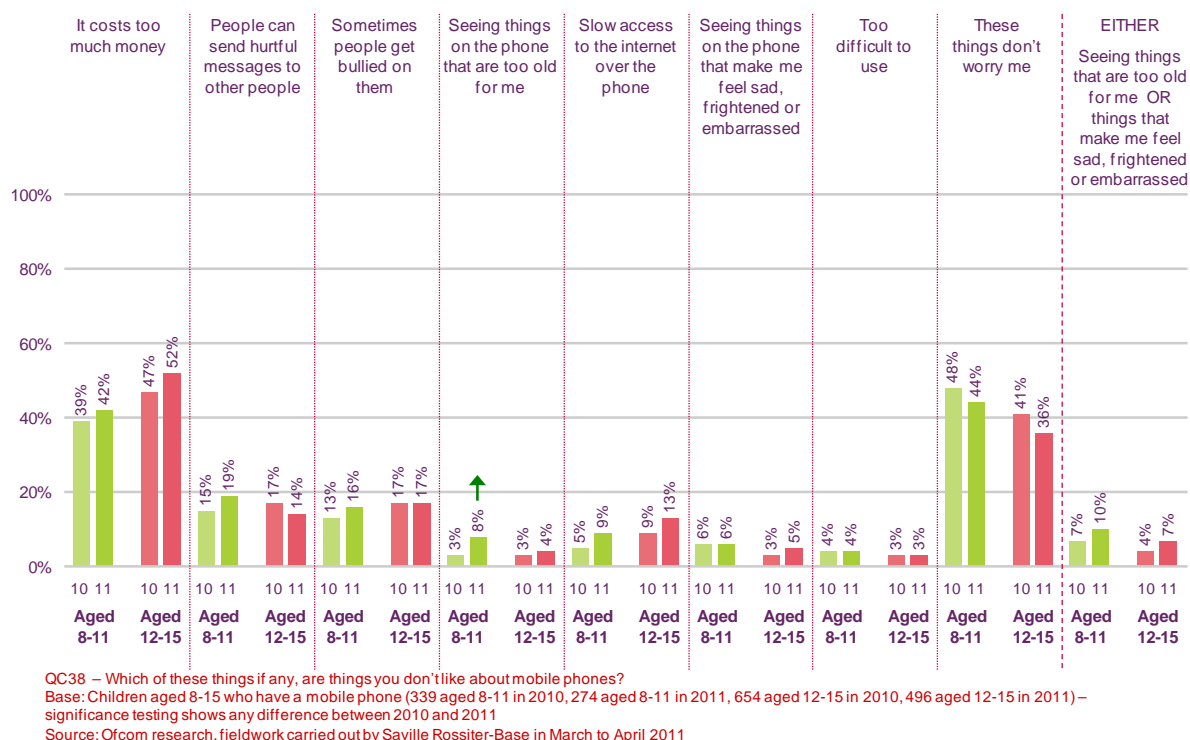
Around one fifth of children dislike the possibility that someone might try to befriend them when playing games online

Children who ever play games online through a gaming device were also prompted with a list of six possible dislikes about online game playing and asked which, if any, applied to them (Figure 69).

Close to one in five 8-11s (18%) and 12-15s (19%) dislike the possibility that someone might try to befriend them. Similar proportions of 8-11s and 12-15s dislike the possibility that strangers might find out information about them (16% for 8-11s and 20% for 12-15s), that people can say hurtful things about how others play games (18% for 8-11s and 17% for 12-15s), that players can exclude other players from the game on purpose (17% vs. 16%) or that players can pick on other players when gaming (14% vs. 18%).

Among all 8-15s[65] there is only one difference by gender; boys are more likely to say they sometimes spend too much time gaming (27% vs. 15%).There are, however, no apparent differences when comparing children who play games online in ABC1 households to those in C2DE households.[66]

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[65]Due to the relatively low number of interviews conducted with girls who ever play games online, it is not possible to look at any differences by gender within age.

[66] Due to sample sizes it is not possible to look at any differences in each of the four socio-economic groups.

Figure 69: Children's dislikes about online gaming, by age: 2010 and 2011
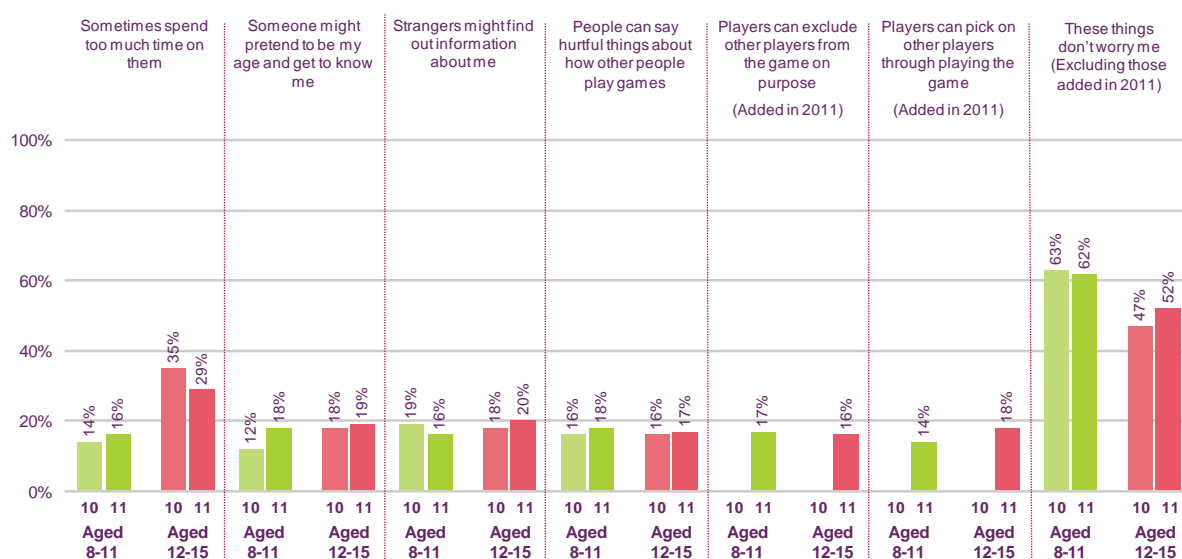
QC33 – Which of these things if any, are things you don't like about playing games over the internet?
Base: Children aged 8-15 who ever play games online (184 aged 8-11 in 2010, 199 aged 8-11 in 2010, 299 aged 12-15 in 2009, 235 aged 12-15 in 2010) – significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Reporting online content that is nasty, worrying or offensive

One in ten boys aged 12-15 would not tell someone if they find something online that is worrying, nasty or offensive

Children aged 8-15 who use the internet at home were asked whether they would tell anyone if they saw something online that they found worrying, nasty or offensive in some way. If they would tell someone, they were asked to say who that person would be.

8-11s are more likely than 12-15s to say they would tell someone, accounting for nearly all 8-11s (96%) and nine in ten 12-15s (91%)[67]. The majority of both age groups would tell a family member (parent/ sibling or other), with younger children more likely to do this than older children (90% vs. 78%). Older children would be more likely than younger children to tell a friend (20% vs. 9%).

Children aged 12-15 are more likely than 8-11s to be unsure about whether they would tell someone (4% vs. 1%). A significant minority of children aged 12-15 (9%) would therefore not necessarily tell someone if they saw something online that they found to be worrying, nasty or offensive.

There are some differences by gender among 12-15s, with girls being more likely to tell family members (85 vs. 71%) or to tell friends (24% vs. 15%) while boys aged 12-15 are more likely to say they would not tell anyone (9% vs. 2%).

[67] Included in this group are the 1% of 8-11s and 4% of 12-15s who said they were unsure who they would tell.

Figure 70: Reporting online content that is considered by the child to be worrying, nasty or offensive, by age: 2009, 2010 and 2011
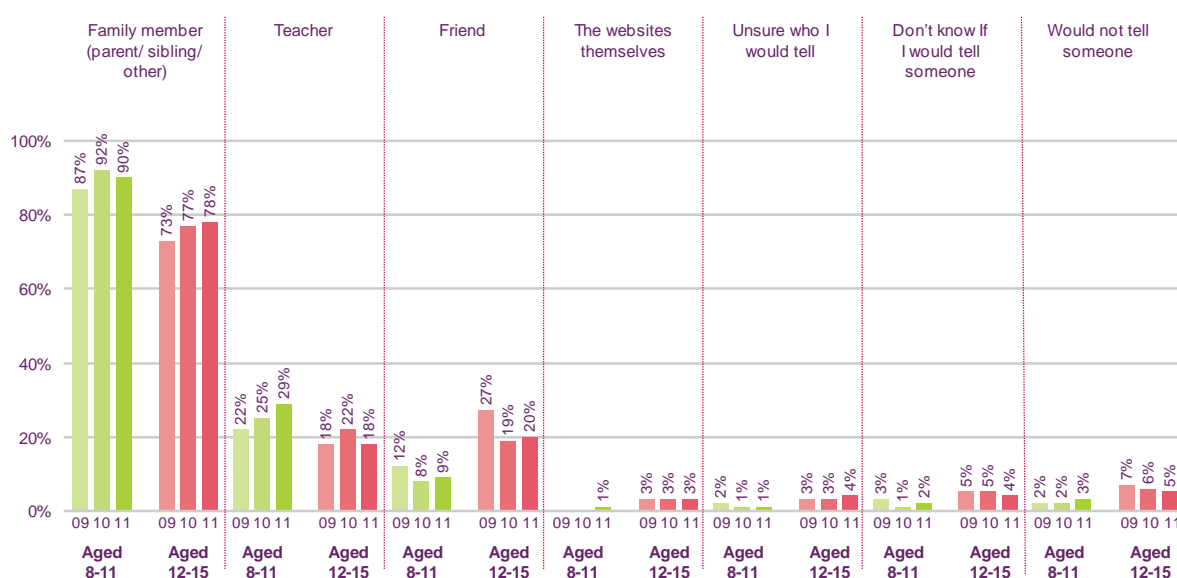
QC27A – If you saw something online that you found worrying, nasty or offensive in some way, would you tell someone about it? IF YES – Who would you tell? (Shows spontaneous responses from > 1% of all internet users aged 8-15) (spontaneous responses, multi-coded)
Base: Children aged 8-15 who use the internet at home (581 aged 8-11 in 2009, 597 aged 8-11 in 2010, 496 aged 8-11 in 2011, 645 aged 12-15 in 2009, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Children's attitudes towards the internet

One in eight 12-15s say they forget about the safety rules when using the internet

Children aged 8-11 and 12-15 who use the internet at home were prompted with a series of statements about the internet and were asked which ones, if any, they agreed with (Figure 71).

Children aged 12-15 are more likely than those aged 8-11 to agree with each of these statements[68]. 12-15s are three times more likely to agree that "When I'm on the internet I forget about the safety rules" (13% vs. 4%) and nearly three times as many 12-15s as 8-11s agree that "It's easier to talk about personal things on the internet" (19% vs. 7%).

One in three 12-15s (32%) agree that "I find it easier to be myself online than when I am with people face to face" as do 16% of 8-11s. Around one in four or fewer in each age group feel that "It's easier to keep things secret or private on the internet than in real life" (20% for 8-11s and 26% of 12-15s). Around one in five 12-15s agree that they feel more confident online than they do in real life (22% vs. 14%)

There are some differences by gender. Boys aged 12-15 are more likely than girls of this age to agree that when they are on the internet they forget about the safety rules (16% vs. 10%), or that it's fun being silly or rude on the internet (19% vs. 9%) as are boys aged 8-11 (11% vs. 4%. Boys aged 8-11 are also more likely than girls of this age to say that it's easier to keep things secret or private on the internet than in real life (25% vs. 15%).

There are no differences by household socio-economic group for any of the statements.

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[68] This is not because younger children are more likely to disagree, but are more likely to be unsure.

Where it is possible to make comparisons over time, both 8-11s and 12-15s are less likely since 2010 to say that it's easier to talk about personal things on the internet (7% vs. 15% for 8-11s, and 19% vs. 31% for 12-15s). 8-11s are also less likely now to say they forget about safety rules when online (4% vs. 8%).

Figure 71: Children's opinions of the internet, by age: 2011

NQC15 – Here are some things that people have said about the internet. Which ones do you agree with? (prompted responses, multi-coded)
Base: Children aged 8-15 who use the internet at home (496 aged 8-11, 529 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011
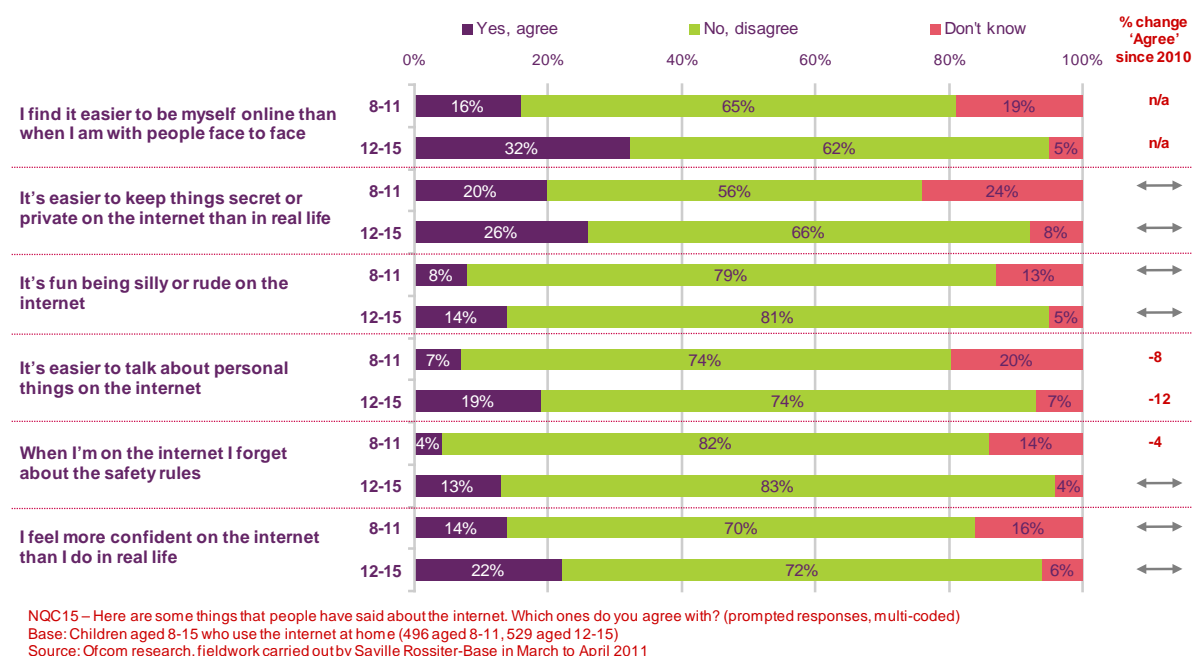
Incidence of negative experiences on the internet or on mobile phones

Around one in ten children aged 8-15 say they have seen something online in the past year that is worrying, nasty or offensive

In 2011, parents of children aged 5-15, whose child uses the internet at home, and children aged 8-11 and 12-15 who use the internet at home, were asked whether, in the past year, they / their child had seen anything online that is worrying, nasty or offensive. Figure 72 shows the responses for both parents and children, by age and by gender within age.

Parents of 8-11s (13%) and 12-15s (16%) are more likely than parents of 5-7s (4%) to think that their child has seen any online content that is worrying, nasty or offensive. Just under one in ten children aged 8-11 who use the internet at home (8%) say they have seen something online in the past year that is worrying, nasty or offensive, with 12-15s being more likely to say this (13%).

When looking at how this by gender, the gap between the parents' and the children's responses is higher for boys aged 8-11 (12 percentage points) and boys aged 12-15 (7 percentage points) than for girls in either age group.

There are no differences by household socio-economic group for either the parents' estimates, or among the responses given by children aged 8-15.

Figure 72: Parents' estimates of, and children's claimed experiences of having seen any online content in the last year that is considered worrying , nasty or offensive, by age and gender: 2011
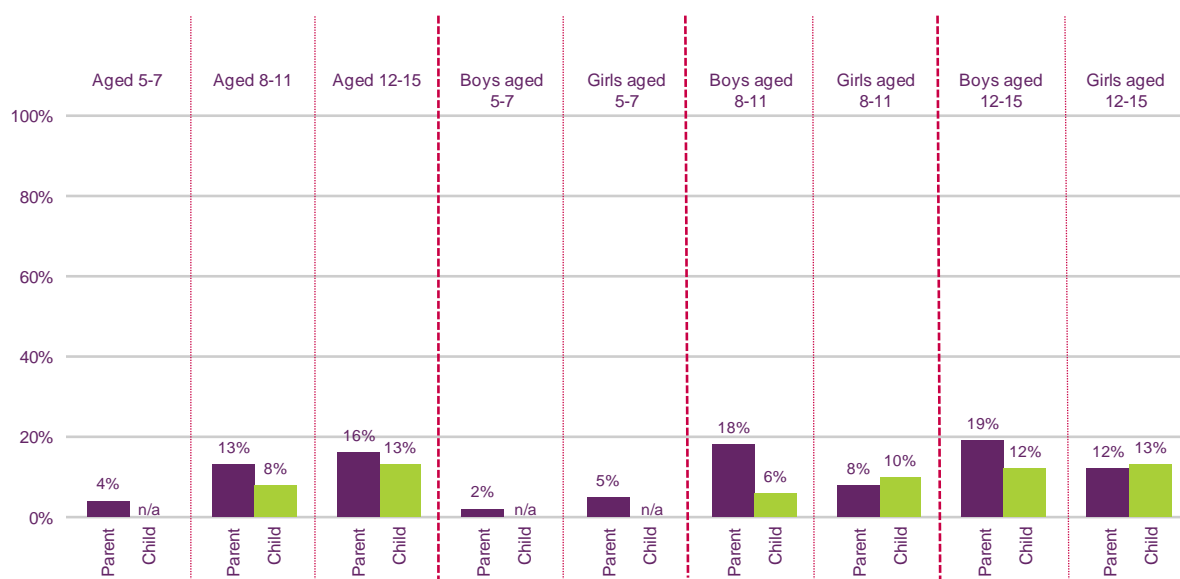
NQP33D/ NQC27B – In the last year, do you think your child has seen anything online that is worrying, nasty or offensive in some way?/ And in the last year, have you seen anything online that you found worrying, nasty or offensive in some way? (Prompted responses, single coded)
Base: Parents of children aged 5-15 whose child uses the internet at home/ Children aged 8-15 who use the internet at home or anywhere else (396 aged 5-7, 496 aged 8-11, 529 aged 12-15, 185 boys aged 5-7, 211 girls aged 5-7, 252 boys aged 8-11, 244 girls aged 8-11, 255 boys aged 12-15, 274 girls aged 12-15, 779 ABC1, 642 C2DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Few children say they have personal experience of being bullied through a mobile phone

Children aged 8-11 and 12-15 with a mobile phone were asked whether they knew of anyone who had been bullied, through someone being nasty or hurtful to them through their mobile phone, in the past year[69].This question was followed by asking the child whether they themselves felt they had been bullied by anyone being nasty or hurtful to them through their mobile phone in the past year[70].

Figure 73 shows that 3% of 8-11s and 6% of 12-15s feel they have experienced bullying through a mobile phone in the past 12 months.

Girls in both age groups are more likely than boys to know of someone that has been bullied through a mobile phone (14% vs. 5% for 8-11s and 30% vs. 16% for 12-15s). Girls aged 12-15 are more likely to say they have experienced bullying in this way (10% vs. 2%).

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[69] It was important to ensure that these questions about bullying and the potentially harmful side of mobile phone and internet use did not distress the child. The questions were placed at the end of the questionnaire, options for declining to answer were always provided, and the questions used show-cards, allowing the child to read out the letter relating to the particular response they wanted to give.
[70] Children were provided with the following explanation in advance of asking the question relating to bullying through a mobile phone: "I'm now going to ask you just a few questions about some of the things that can be more difficult about mobile phones. Sometimes, children or teenagers can say or do things to other children that can be quite nasty or hurtful. This type of behaviour is known as bullying. Children or teenagers can bully others using their mobile phone, by making nasty calls or sending nasty or hurtful text messages or video clips."

Figure 73: Experience of bullying through a mobile phone, by age and gender: 2011

Few children say they have personally experienced being bullied online[71]

Children aged 8-11 and 12-15 who use the internet at home or elsewhere were asked similar questions about whether they knew anyone, or had personally experienced, being bullied through someone being nasty or hurtful to them online[72] in the past year.

Figure 74 shows that a comparable proportion of 8-11s and 12-15s say they have been bullied online in the past 12 months, accounting for 5% of 8-11s and 7% of 12-15s.

12-15s are more likely than 8-11s to know of someone who has been bullied online (25% vs. 10%) and within the 12-15 group, girls are more likely than boys to know someone who has been bullied online (30% vs. 19%).

As with bullying through a mobile phone, girls aged 12-15 are more likely than boys to have personal experience of being bullied online (10% vs. 5%).

Children aged 8-15 in AB households are less likely to say they have experienced online bullying in the past year, compared to all children (2% vs. 6%).

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[71]Several studies into online bullying have been published recently, using a variety of methodologies. For further research on cyberbullying see Beatbullying *Virtual Violence: Protecting Children from Cyberbullying*http://www.beatbullying.org/dox/resources/reports.html and the EU Kids Online project http://www2.lse.ac.uk/media@lse/research/EUKidsOnline/EU%20Kids%20II%20(2009-11)/EUKidsOnlineIIReports/Final%20report.pdf.

[72] In addition to the definition of bullying that was provided for mobile phones, children were also told that "Sometimes children or teenagers can bully others online, perhaps by sending hurtful messages or video clips".

Figure 74: Experience of being bullied online, by age and gender: 2011
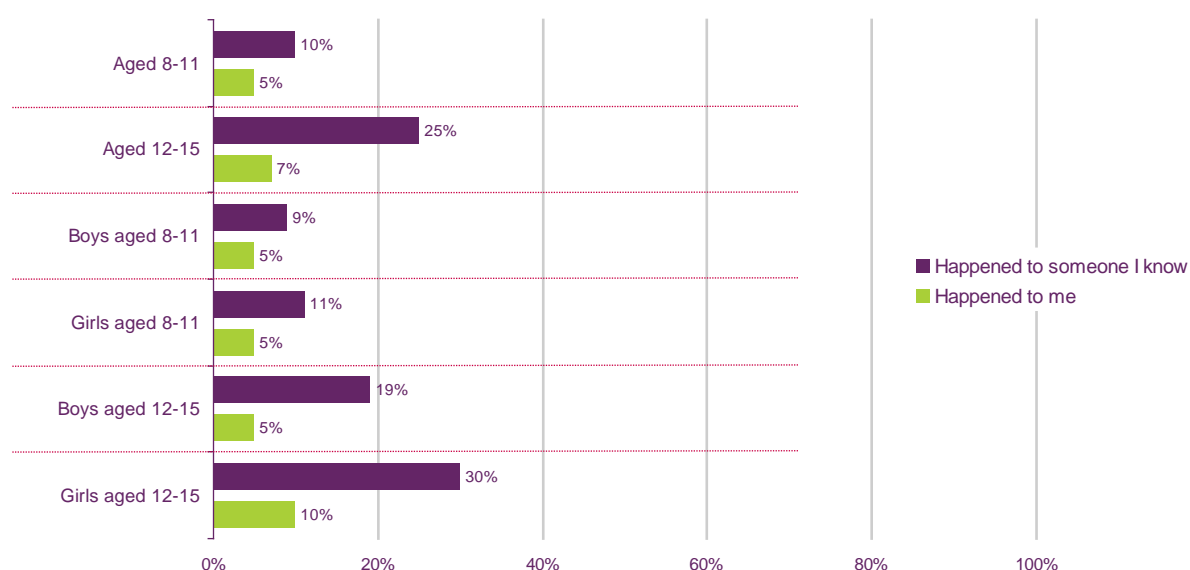
NQC39E/F – In the last year, do you know of anyone who has been bullied by someone being nasty or hurtful to them online?/ In the last year, do you feel you have been bullied by someone being nasty or hurtful to you online? (Prompted responses, single coded)
Base: Children aged 8-15 who use the internet at home or elsewhere (563 aged 8-11, 550 aged 12-15, 285 boys aged 8-11, 278 girls aged 8-11, 267 boys aged 12-15, 283 girls aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Close to half of 12-15s know someone with experience of negative online/ mobile phone activity

In 2011, children aged 12-15 were asked whether they personally knew anyone who, in the past year, had experienced, online or through a mobile phone, any of a range of negative experiences. They were also asked if they had themselves experienced any of these in the past 12 months.

Figure 75 shows that close to half of all children aged 12-15 (46%) say they know of someone who has experienced any of the negative experiences. One in five 12-15s (20%) say they have personally experienced at least one of these in the last 12 months. Gossip being spread is the most likely personal experience, at just over one in ten (13%) 12-15s. Each of the other experiences we asked about has been experienced by around one in twenty children aged 12-15 (5%) or fewer. One per cent of children aged 12-15 say they have seen something of a sexual nature, either online or on their mobile phone, rising to 5% saying that someone they know has seen this[73].

Personal experience does not vary by gender or by socio-economic group. However, girls aged 12-15 are more likely than boys to know of someone who has had gossip spread about them online or through a mobile phone (44% vs. 29%), or who has had embarrassing pictures posted online or sent to other people against their wishes (23% vs. 14%).

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[73] Given the face-to-face nature of the survey together with the topic, it is possible that some children were not comfortable in giving a direct answer to this question.

Figure 75: Experience of negative types of online/ mobile phone activity, among children aged 12-15: 2011

NQC39G/H – Please take a look at the list of things shown on this card and think about whether you know anyone who has experienced any of these things in the last year, either online or on a mobile phone./ Again, please just read out the letters from the card if you yourself have experienced any of these things in the last year. (Prompted responses, multi coded)
Base: All children aged 12-15 (558 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Risky and safe online behaviour

Around one in seven internet users aged 12-15 have undertaken some form of potentially risky behaviour online

Children aged 12-15 who use the internet at home or elsewhere were asked, from a prompted list, whether they had undertaken any of the types of potentially risky online behaviour in the past year.

Figure 76 shows that one in seven home internet users aged 12-15 (14%) have done any of these potentially risky things in the past year. Around one in ten children aged 12-15 (11%) have taken the contact details for someone they have only met online. There are no differences by gender. Children aged 12-15 in C2DE households are more likely than those in ABC1 households to have sent personal information (such as contact details) to someone they have only met online (8% vs. 3%).

Among children aged 12-15 with an active social networking profile, children with more open profiles (i.e. their profile is set to be seen by anyone or by friends of friends) are more likely than children with more private profiles (that can be seen only by their friends) to have added people to their friends that they have only had contact with online (21% vs. 10%), to have sent personal information to a person they have only had contact with online (12% vs. 4%) and to have pretended to be a different kind of person online to who they really are (6% vs. 1%).

Figure 76: Experience of potentially risky online behaviour among children aged 12-15:2011

Among those with an active social networking site profile

	Profile visible to friends and their friends/ visible to anyone	Profile visible to friends only
Added people to your friends list or address book or contacts list that you've only had contact with online — 11%	21% ↑	10%
Sent personal information such as your full name, address or phone number to a person you've only had contact with online — 5%	12% ↑	4%
Pretended to be a different kind of person online to who you really are — 2%	6% ↑	1%
Sent a photo or video of yourself to a person that you've only had contact with online — 1%	0%	2%
ANY OF THESE — 14%		

0%   20%   40%   60%   80%   100%

NQC39I – Please take a look at the list of things shown on this card and think about whether you have done any of these things in the last year. If there is something on the list that you have done in the last year then please just read out the letters from the card. please just read out the letters from the card if you yourself have experienced any of these things in the last year. (Prompted responses, multi coded)
Base: Children aged 12-15 who use the internet at home or elsewhere (550 aged 12-15,108 aged 12-15 with a profile that is visible to friends and their friends/ visible to anyone, 280 aged 12-15 with a profile that is only visible to friends) - significance testing shows any difference between the two groups with an active social networking site profile
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

12-15s who use the internet at home or elsewhere were also prompted with a list of online behaviours and were asked to say whether they knew how to do any of them and whether they had done any of them in the past year.

Figure 77 groups the behaviours we asked about into 'safe' and 'risky' groups.

Around half of 12-15s say they know how to do each of the 'safe' measures asked about, and about one third say they have done each of these in the past 12 months.

Internet users aged 12-15 are more likely to have deleted history records than they are to have unset any online filters or controls (20% vs. 5%). Girls aged 12-15 are more likely than boys of this age to say they have deleted history records (24% vs. 16%).

Figure 77: Experience of 'safe' and 'risky' online measures among children aged 12-15: 2011
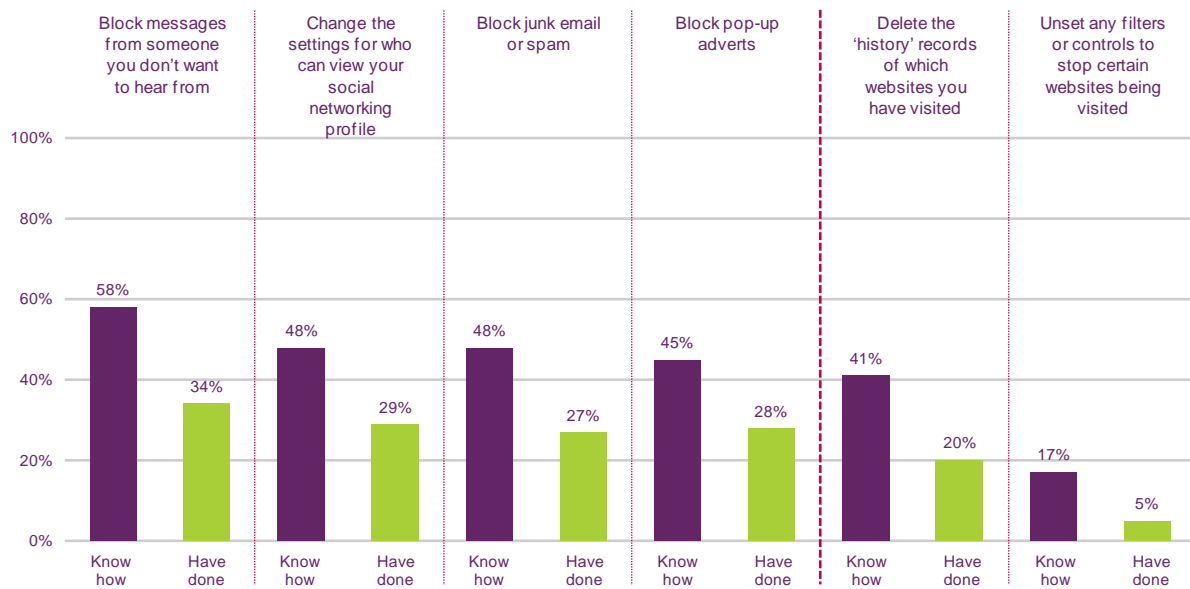
NQC39J/K – Please take a look at the list of things shown on this card and think about whether you know how to do any of these things online. Please read out the letters on the card if you know how to do this./ And are there any things on this list that you personally have done online in the last year? Please read out the letters on the card if you have done this in the last year. (Prompted responses, multi coded)
Base: Children aged 12-15 who use the internet at home or elsewhere (550 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parents' rules and controls

This section examines the types of rules and restrictions that parents put in place for their children across various media.

It looks at the type of 'technical' controls and filters that are in place, and the levels of guidance provided by parents in helping their child stay safe online.

It also looks at the relationship between rules about online parental supervision and children's attitudes and behaviour, and the relationship between online controls and children's attitudes and behaviour.

Key findings

- Most parents have rules in place for their child's use of television, internet, mobile phones and gaming. Rules are more likely to be in place for 5-7s and 8-11s than for 12-15s for television, internet and gaming, and are more likely to be in place for 8-11s than for 12-15s for mobile phones.

- Households with a multichannel television service (95% of all 5-15s) are now more likely to have access controls through a PIN or password than in 2010 (44% vs. 36%).

- In the pre-watershed television programming research (see annex 1), of the 33% of parents interviewed who had concerns about the types of programming their children had watched before 9pm, eight in ten (80%) had either switched off or switched over as a result of seeing something concerning for their child. Just over a quarter (28%) of those interviewed discussed the issue with their child and 5% made a complaint.

- Among parents whose child has a mobile phone that can be used to go online, one in three (31%) have limited their access to the internet to exclude websites aimed at over-18s.

- Parental controls are unlikely to be in place for handheld games players (12%) or games consoles connected to a television (15%).

- There has been no change since 2010 in the incidence of internet controls or filtering software being in place; this accounts for four in ten (39%) households where a child aged 5-15 uses the internet at home. However, since 2008 there has been a decline in the incidence of controls/filters. Parents are more likely to have installed software to protect against junk email or computer viruses than they are to have installed internet controls or filtering software (67% vs. 39%).

- Fewer than half of those whose child uses each type of service have safe settings in place for search engine websites (47%), the YouTube site (28%) or UK TV broadcasters' sites (18%).

- Across all these types of 'technical' parental controls, six in ten (59%) parents of 5-15s say they have these in place.

- Over half (54%) of parents of 5-15s say they have rules about the internet related to active supervision, with parents of 5-7s (63%) and 8-11s (61%) being more likely to have rules than parents of 12-15s (42%). This has increased since 2010.

- Four in five parents of 5-15s say they have spoken with their child about staying safe online (83%) and a similar proportion say they feel they know enough about how to help their child stay safe online (82%).

- Nine in ten children aged 8-15 say they have been given information about staying safe online.

- One in four parents (27%) of children who use the internet at home use any of the 'technical' parental controls and have rules relating to supervising their child's internet use and talk to their child about staying safe online.

- While there appears to be no clear relationship between the use of online controls and children's attitudes and behaviour, our research suggests a relationship between the presence or absence of rules relating to supervision, the ways that a child accesses the internet at home and their activities online.

Parents' rules across media

The majority of parents have rules in place for their child's use of television, internet, mobile phones and gaming

Parents of children aged 5-15 were prompted with a list of rules and restrictions relating to each of the key media platforms (television, radio, internet, games consoles/ players, and mobile phone) that their child used, and were asked to say which rules they had in place for their child. Detail on the particular types of rules in place for each of the key media platforms is shown later in this section. Figure 78 shows the extent to which cross-media rules are in place for children who use each medium at home.

The majority of parents have rules in place concerning access to, and use of, each of the platforms apart from radio, with rules for television and the internet being the most common. For all platforms, with the exception of mobile phones, younger children (aged 5-7 and 8-11) are more likely to have rules in place compared to older children (12-15).

In 2010, when making comparisons by household socio-economic group, parents of children in AB homes were more likely, compared to all parents, to have rules in place for three media: television, gaming and radio. This is not the case in 2011; there are now no differences by household socio-economic group for rules about television, the internet, mobile phones or radio. Rules about gaming, however, are less likely in DE households compared to all households with children aged 5-15 (69% vs. 75%).

Parents of boys aged 12-15 are more likely than parents of girls to have rules in place for gaming (64% vs. 52%).

Compared to 2010, 5-15s who use the internet at home are more likely to have rules in place, which is driven by an increase in rules about the internet for 5-7s (82% in 2011 vs. 78% in 2010) and for 12-15s (72% vs. 66%). Children aged 5-15 who play games at home are also now more likely to have rules than in 2010 (75% vs. 69%); this is attributable to an increase in rules for 5-7s (87% vs.78%) and for 8-11s (83% vs. 77%). Rules about radio

among all 5-15s have decreased since 2010 (20% vs. 25%); this decrease is not attributable to a change in any particular age group.

Figure 78: Parental rules about use of media, by age: 2011

QP9/ QP17/ QP24/ QP37/ QP46 – Do you have any of these rules or restrictions about the (MEDIA) that your child watches/ listens to/ uses?
Base: Parents of children aged 5-15 who use each medium at home (VARIABLE BASE) – significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011
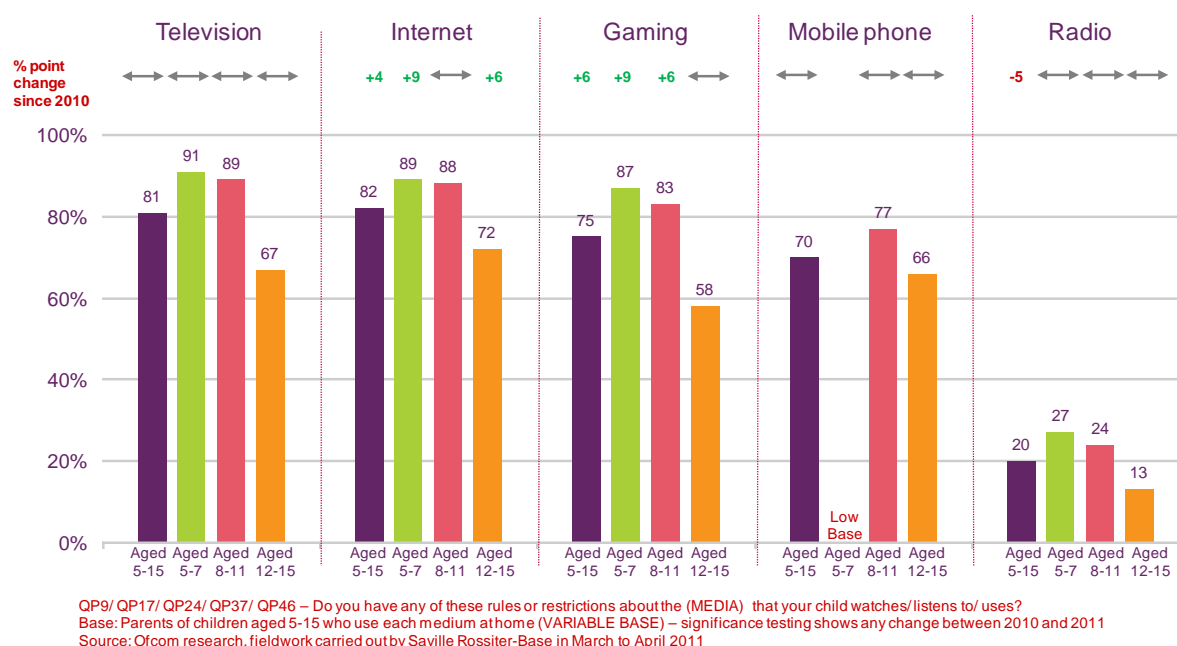
Rules about television viewing

Rules about television viewing have remained consistent since 2010

Household rules for television viewing are more likely to be in place for 5-7s (91%) and 8-11s (89%) than for 12-15s (67%). This is also true for nine of the ten individual rules that parents were prompted with, the exception being the rule relating to PIN/ password controls to watch certain channels/ films.

There are four rules in place relating to television viewing for the majority of 5-7s:

- no TV after a certain time (56%);
- no programmes with swearing/ bad language (54%);
- no programmes with violence (51%); and
- no programmes with nudity/ sexual content (51%).

The rule relating to no TV after a certain time is the only one in place for the majority of 8-11s (58%) with no single rule in place for the majority of 12-15s.

While there are no differences in the overall incidence of rules for television by household socio-economic group, there are two differences relating to specific rules. Parents of children in AB households are more likely than all parents to have the rule that the child can only watch DVDs/ videos that a parent or adult has watched first (42% vs.35%), while parents in DE households are less likely to have the rule relating to the parent regularly checking on what their child is watching (34% vs. 39%).

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Figure 79: Parental rules for television, by age: 2011

	Aged 5-7	Aged 8-11	Aged 12-15
Any rules or restrictions	91%	89%	67%
No TV after a certain time	56%	58%	36%
No programmes with nudity/ sexual content	51%	49%	29%
Only DVDs/ videos with an appropriate age rating	48%	38%	23%
No programmes with swearing/ bad language	54%	43%	22%
Regularly check on what they are watching	47%	46%	27%
No programmes with violence	51%	40%	20%
Only children's TV programmes/ children's channels	41%	20%	5%
Need a PIN/ password to watch certain channels/ certain movie ratings	17%	23%	21%
Only DVD/ video that an adult or parent has watched first	13%	14%	6%
Can only watch when supervised/ not on their own	13%	8%	2%

QP9– Do you have any of these rules or restrictions about the TV, videos and DVDs that your child watches? (prompted responses, multi-coded)
Base: Parents of children aged 5-15 whose child watches TV at home (567 aged 5-7, 577 aged 8-11, 558 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Research into parents' and teenagers' opinions and concerns on pre-watershed television programming (see annex 1 for full report)

- Of the 33% of all parents surveyed who expressed concern regarding the programming their children had seen on TV before 9pm, 70% said they switched off or switched over as a result of seeing something concerning for their child. 28% discussed the issue with their child and 4% said they made a complaint.

- Among parents who expressed concerns over music videos 72% said they switch off or switch over (53% switch over/35% switch off – some selected both options), 14% said they discussed the issue with their child or banned future viewing of that programme and 5% said they made a complaint.

- Around half (51%) of teens surveyed either switched off or switched over if they saw something uncomfortable or offensive. Just under half (48%) said they discussed it with their family and/or friends. Sixteen percent (16%) said they continued watching and 14% said they did nothing.

Technical controls on television

Parents are now more likely to have set access controls on their digital television service

As well as having rules relating to their child's use of different media, parents may also employ more technical measures to control their child's access and use. As noted earlier, almost all 5-15s (95%) live in a household with a multichannel television service. Parents of children in these households were asked whether they had any controls on their service so that their child could only watch particular channels or types of programmes once a PIN number or password had been entered.

More than four in ten households with a multichannel television service have set these controls (44%), with no particular variation by the age of the child. There has been an increase in the incidence of setting access controls for multichannel television services since 2010 among households with children aged 5-15 (44% vs. 36%). This overall increase is evident among households with children aged 8-11 (47% vs. 39%) and 12-15 (42% vs. 31%).

Access controls are more likely to be set in households with a satellite (55%) or cable television service (51%), and are considerably less likely to be set in households with Freeview (29%)[74]. Since 2010, there has been an increase in the incidence of using access controls for satellite services (55% vs. 46%) and in Freeview households (29% vs. 22%). There are no differences in the incidence of access controls by household socio-economic group or by the child's gender.

Figure 80: PIN or password controls set on television services: 2005, 2007, 2009, 2010 and 2011

Controls set on television service

NQP11 Are there any controls set on your TV service so that your child could only watch particular channels or types of programmes once a PIN number or password has been entered?/ WORDING IN 2005 - Have you or has anyone in your household set any controls on your TV service so that particular channels can only be watched by using a PIN number or password? /WORDING UNTIL 2010/ Does your television service have any parental controls set to stop certain programmes, films or channels being viewed on yout TV until a PIN or password is entered? WORDING IN 2011(prompted responses, single coded)
Base: Parents of children aged 5-15 with multi-channel TV in the household and whose child watches TV at home (3219 aged 5-15 in 2007, 1936 aged 5-15 in 2009,1963 aged 5-15 in 2010, 1635 aged 5-15 in 2011, 825 aged 5-7 in 2007, 517 aged 5-7 in 2009, 528 aged 5-7 in 2010, 540 aged 5-7 in 2011, 513 aged 8-11 in 2005, 1173 aged 8-11 in 2007, 702 aged 8-11 in 2009, 719 aged 8-11 in 2010,559 aged 8-11 in 2011, 521 aged 12-15 in 2005, 1221 aged 12-15 in 2007, 717 aged 12-15 in 2009, 716 aged 12-15 in 2010, 536 aged 12-15 in 2011) – significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parents with controls in place on their multichannel television service were prompted with four types of control and were asked to select which ones they had in place at home. Figure 81 shows their responses[75]. Households with children aged 5-7 are more likely to have the control to prevent specific channels from being viewed after a specific time/ after 8pm compared to households with children aged 12-15 (24% vs. 14%), but the incidence of controls does not otherwise vary by age, gender or socio-economic group.

Parents with a DVR that has television controls enabled were asked about a further access control that can be used with a DVR. At least six in ten of this group (63% for 5-7s, 64% for 8-11s, 61% for 12-15s) ensure that a PIN is required to view a recording that was originally broadcast after 9pm. Since 2010 this control is more likely among households with children aged 8-11 (64% vs. 52%) and 12-15 (61% vs. 49%).

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[74] This could be because parental control functionality is not universal for set-top boxes or digital televisions that offer Freeview television services.
[75] The access control "require a PIN to view a recording originally broadcast after 9pm" was only asked of those with television controls and a DVR.

Parents with access controls in place were also asked whether their child knows the PIN or password necessary to override the television access controls; the responses are shown in Figure 81. Knowledge about how to override these access controls increases with the age of the child, accounting for one in twenty 5-7s (6%), close to two in ten 8-11s (17%) and one in four 12-15s (26%). Knowledge of overriding controls among 8-11s has increased since 2010 (17% vs. 10%).

Figure 81: Types of access controls in place among parents with controls set on their multichannel television, by age: 2010 and 2011

QP13/QP14 – Do you use these parental controls in any of these ways? (prompted response, multi-coded) /Does the child know the PIN or password to override these controls? (spontaneous response, single coded)
Base: Parents of children aged 5-15 with multichannel TV in the household and parental controls set (184 aged 5-7 in 2010, 238 aged 5-7 in 2011, 256 aged 8-11 in 2010, 261 aged 8-11 in 2011, 215 aged 12-15 in 2010, 223 aged 12-15 in 2011) / *** Base represent all children aged 5-15 with multichannel TV in the household and a DVR, with parental controls set (197 aged 5-7 in 2011, 189 aged 8-11 in 2010, 212 aged 8-11 in 2011, 156 aged 12-15 in 2010, 185 aged 12-15 in 2011) - low base for children aged 5-7 in 2010 – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Among those without access controls set, one fifth of parents were unaware of them or did not know how to set them

Those parents who do not have any access controls set up for their multichannel television service were asked to say why (Figure 82). The reasons given by parents tend to differ depending on the age of the child.Parents of older children are more likely to say that they trust their child to be sensible/ responsible, while parents of younger children are more likely to say it is because their child is supervised, or that the child is too young for a lack of controls to be a problem.

Reasons for not having access controls set up for multichannel television do not vary by the gender of the child or the household's socio-economic group.

Some parents responded that they did not know how to set access controls, or did not know that these settings were possible. Being unaware of access controls in either of these ways accounts for 17% of all parents of children aged 5-15 who do not have these settings in place, and is more common among parents of 8-11s (22%) than parents of 12-15s (13%). As in previous surveys, those in households with a Freeview service are more likely to be unaware of access controls in either of these ways (23% vs. 17%).

Compared to 2010, parents are more likely to say they are unaware of access controls (17% vs. 13%), with this increase evident among parents of children aged 5-7 (15% vs. 9%).

Figure 82: Reasons for not having controls in place for multichannel television, by age: 2010 and 2011

QP12– Can you tell me why that is? (spontaneous responses, multi coded) – only responses shown where>5% of all parents have given that answer
Base: Parents of children aged 5-15 who have multi-channel TV in the household and no controls set (334 aged 5-7 in 2010, 291 aged 5-7 in 2011, 453 aged 8-11 in 2010, 281 aged 8-11 in 2011, 486 aged 12-15 in 2010, 297 aged 12-15 in 2011) - significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Rules about radio listening

A minority of parents have rules in place about radio

As with television, rules relating to radio are more likely to be in place for 5-7s (27%) or 8-11s (24%) than for 12-15s (13%) who listen to the radio at home. The most common rule among parents of 8-11s and 12-15s relates to not listening after a certain time of day. This rule is also popular among parents of 5-7s, as is regularly checking on what they are listening to, and rules about no music with swearing or bad language.

Figure 83: Parental rules for radio, by age: 2011

	Aged 5-7	Aged 8-11	Aged 12-15
Any rules or restrictions	27%	24%	13%
No radio after a certain time	10%	11%	9%
No music with swearing/bad language	8%	4%	3%
Regularly check on what they're listening to	9%	6%	3%
Can only listen when supervised/not on their own	4%	5%	1%
Only certain radio stations/shows	4%	3%	1%

QP17– Do you have any of these rules or restrictions about radio that your child listens to? (prompted responses, multi-coded)
Base: Parents of children aged 5-15 whose child listens to the radio at home (183 aged 5-7, 233 aged 8-11, 265 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parental rules for mobile phones

The majority of parents of 8-11s and 12-15s have rules in place about their child's mobile phone use

Most parents whose child has their own mobile phone have put in place at least one of the rules that we asked about. In 2011, rules about mobile phone use are more likely among parents of 8-11s than among parents of 12-15s (77% vs. 66%).

As in 2010, many of the rules and restrictions for mobile phone use relate to the cost associated with using the phone rather than the possibility of encountering inappropriate or potentially harmful content. The incidence of these rules does not vary by the age of the child.

The overall incidence of rules about mobile phone use and each of the individual rules that we asked about do not vary by the child's gender within each age group or by the household's socio-economic group.

Parents of children aged 8-11 are now more likely to say they have two rules in place for their child: no texts to premium rate numbers (23% vs. 17%) and calls/ texts only to an agreed list of people (26% vs. 20%). Parents of children aged 12-15 are now less likely than in 2010 to say that their child is responsible for paying the phone's bills or top-ups (16% vs. 21%). Otherwise, the overall incidence of rules and each of the individual rules have not changed since 2010.

While the overall incidence of rules is no different among parents of 5-15s with a smartphone than among parents of children with any mobile phone, those with a smartphone are less likely to have the rule to only make/ receive calls or texts and nothing else (6% vs. 15%).

Figure 84: Parental rules for mobile phones, by age: 2011

	Aged 8-11	Aged 12-15
Any rules or restrictions	77%	66%
Limit how often credit can be put on the phone	37%	34%
No calls to premium rate numbers	22%	20%
Regularly check what they are doing with the phone	20%	10%
Child is responsible for paying top-ups/ bills	9%	↓16%
No texts to premium rate numbers	↑ 23%	19%
Only to make/ receive voice calls or send texts, nothing else	21%	11%
Only calls/ texts to an agreed list of people	↑ 26%	10%
No internet sites/ no WAP browsing	16%	9%
Can only visit certain websites on the phone	4%	4%

QP37– Do you have any of these rules or restrictions about the use that your child makes of his/ her mobile phone ? (prompted responses, multi-coded)
Base: Parents of children aged 8-15 whose child has their own mobile phone (274 aged 8-11, 496 aged 12-15) - Significance testing indicates any differences between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parental controls for mobile phones

Three in ten parents of a 12-15 year old with a mobile phone that can be used to go online have limited their child's access to the internet

Parents whose children have their own mobile phone which can be used to get onto the internet were asked whether access to the internet on their child's phone is limited to exclude websites that are aimed at people aged 18 and over[76].

Three in ten (31%) parents of 12-15s with a mobile phone that can be used to go online say that their child's phone is limited to exclude these websites[77]. In most of these cases (20%) this was activated when the phone was purchased rather than by someone in the household (11%). Responses do not vary between those with any type of mobile phone and those with a smartphone (31% vs. 33%).

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[76] The question wording was amended in 2011 (to reflect the overall incidence of mobile phone filters, as distinct from whether a parent or other responsible adult had set up these filters) and so we cannot show comparable findings from previous years.
[77] Low base sizes mean that we cannot report on 5-7s (7) or 8-11s (67) with a mobile phone that can be used to go online.

Figure 85: Use of filters for mobile phone content among 12-15s: 2011

Those parents responding that their child's phone does not have filters for mobile phone content were asked to say why. Across all parents of 5-15s the main reason given is that they trust their child to be responsible (54%). However, a significant minority (28%) respond that they are not aware that this is possible (24%) or don't know how to do it (6%).

Rules about playing games

Parents of younger children are now more likely to have rules in place about games

Most parents whose child plays games on a gaming device[78] say that they have rules or restrictions about the games their child plays. Rules are more likely to be in place for children aged 5-7 (87%) and 8-11 (83%), than for those aged 12-15 (58%).

Six in ten parents of 5-7s and 8-11s have rules restricting the games played to those with an appropriate age rating (63% and 59%), but this is less common among parents of 12-15s (33%). Close to half of parents of 5-7s have rules about the type of content of the games played (48% for no games with swearing/ bad language, 47% for no games with violence, 45% each for no games with nudity/ sexual content and no games with drugs use). The proportion of parents of 8-11s is lower for each of these areas, at around four in ten parents, and around one in five for parents of 12-15s.

When comparing by gender, the overall incidence of having rules in place is higher among parents of boys aged 12-15 than girls (64% vs. 52%), but this difference is not evident for 5-7s or 8-11s. This gender difference among 12-15s is because boys are more likely to have the rule that their parent regularly checks on what they are playing (28% vs. 17%) and a rule for no games after a certain time (28% vs. 16%).

When comparing by household socio-economic group, rules are less likely overall in DE households (69% vs. 75%) as is the specific rule regarding no online game playing with people they don't know already (8% vs. 12%). Parents in AB households are more likely

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[78] This could be a fixed or portable games console/ computer/ mobile phone or portable media player.

than all parents to say they have rules stating no online game playing (19% vs. 14%) or no online game playing with people the child does not already know (19% vs. 12%).

Compared to 2010, at an overall level rules are now more likely among parents of children aged 5-7 (87% vs. 78%) and 8-11 (83% vs. 77%). Four rules are now more likely to be in place for 5-7s: only games with an appropriate age rating (63% vs. 53%), no games with swearing/ bad language (48% vs. 39%), no games with violence (47% vs. 38%) and regular checks on what they are playing (40% vs. 32%). Two rules are now more likely to be in place for 8-11s: only games with an appropriate age rating (59% vs. 44%) and regular checks on what they are playing (41% vs. 33%). Neither the overall incidence of rules nor any individual rules are more or less likely for 12-15s since 2010.

Figure 86: Parental rules for gaming, by age: 2011

	Aged 5-7	Aged 8-11	Aged 12-15
Any rules or restrictions	↑ 87%	↑83%	58%
Only games with appropriate age rating	↑ 63%	↑59%	33%
No games after a certain time	37%	36%	22%
No games with nudity/ sexual content	45%	41%	27%
No games with drug use	45%	41%	24%
No games with swearing/ bad language	↑ 48%	40%	22%
No games with violence	↑ 47%	38%	22%
Regularly check on what they're playing	↑ 40%	↑41%	23%
No online game playing	19%	15%	9%
No online game playing with people they don't already know	13%	15%	7%
Only a game that an adult or parent has played/ tried first	16%	12%	7%
Can only play when supervised/ not on their own	20%	11%	3%

QP46 Do you have any of these rules or restrictions about the games that your child plays – whether on a games console, a computer or any other device? (prompted responses, multi-coded)
Base: Parents of children aged 5-15 whose child ever plays games (492 aged 5-7, 545 aged 8-11, 509 aged 12-15) - Significance testing indicates any differences between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Few games consoles have parental controls set

In 2011 parents whose child aged 5-15 plays at home on a handheld/ portable games console, or a fixed games console connected to a television, were asked whether any parental controls are loaded onto each type of console, either to stop their child playing games that are above a certain age rating or to restrict or prevent their child from going online using the games console.

As shown in Figure 87, around one in seven handheld/ portable games consoles (12%) and fixed games consoles (15%) have parental controls. Parents whose child is aged 5-7 are more likely than those whose child is aged 12-15 to say that parental controls are set on the fixed games console (20% vs. 13%). Responses do not vary by the gender of the child or the household's socio-economic group.

Figure 87: Use of parental controls on games consoles, by age: 2011

Parental controls on <u>handheld/ portable games console</u>

Parental controls on <u>fixed games console (connected to TV)</u>

NQP46C/D – Are there any parental controls set on the handheld games console? / Are there any parental controls set on the games console that is connected to a TV? (spontaneous responses, single coded)
Base: Parents of children aged 5-15 with a portable games console (1166 aged 5-15, 382 aged 5-7, 454 aged 8-11, 330 aged 12-15)/ Parents of children aged 5-15 with a fixed games console (1271 aged 5-15, 366 aged 5-7, 459 aged 8-11, 446 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Those parents who do not have parental controls set on the handheld/ portable games console were asked to say why (Figure 88). As with reasons for not having controls for multichannel television, the reasons given by parents tend to differ by the age of the child. The main reason given by just over one third of parents of 5-7s (36%) and 8-11s (34%) is that their child is always supervised. Among parents of 12-15s, over half (54%) say they trust their child to be responsible, with around one in ten (12%) stating that they do not have parental controls because their child is normally supervised.

Some parents do not use parental controls on the handheld/ portable games console, either because they don't know how to do this, or are not aware that it is possible. Being unaware of parental controls in either of these ways accounts for a quarter (23%) of parents of 5-15s who do not have parental controls in place, and this is comparable across each of the three age groups of children. There are no differences in reasons for not having parental controls in place by household socio-economic group or by the gender of the child.

Figure 88: Reasons for not having parental controls on the handheld/ portable games console, by age: 2011
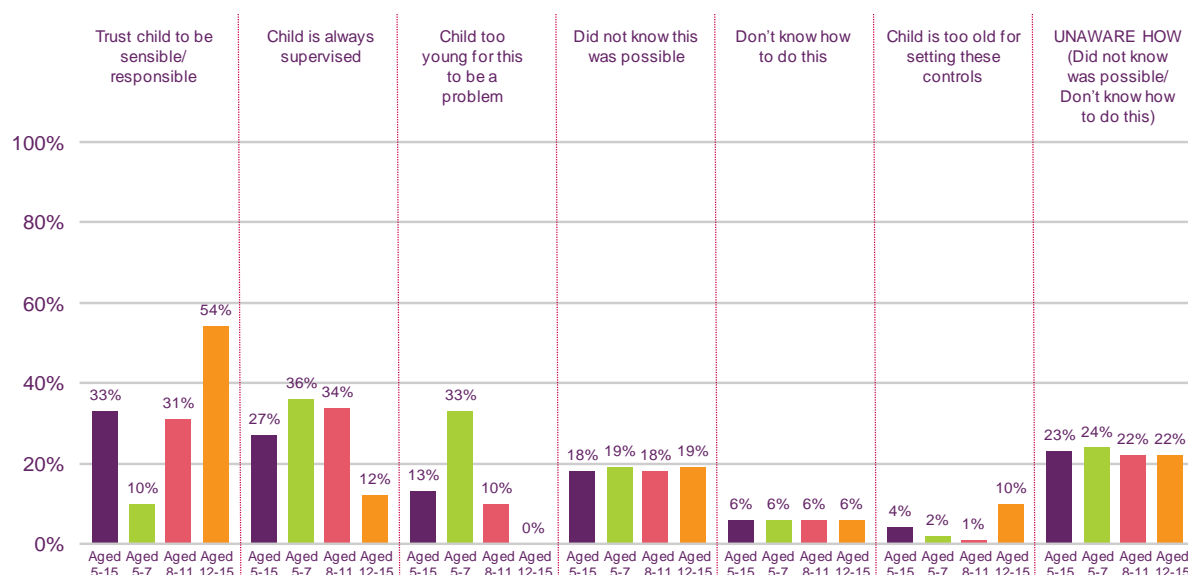
NQP47E– And can you tell me why that is? (spontaneous responses, multi-coded) – only responses shown where >4% of all parents have given that answer
Base: Parents of children aged 5-15 who have not set parental controls on the handheld/ portable games console (979 aged 5-15, 317 aged 5-7, 379 aged 8-11, 283 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Those parents who do not have parental controls set on the fixed games console connected to a television were also asked to say why (Figure 89). The reasons given are similar to those reported above, relating to handheld/ portable games consoles, and tend to differ by the age of the child. The main reason given by around four in ten parents of 5-7s (44%) and 8-11s (37%) is that their child is always supervised. Among parents of 12-15s, six in ten (60%) say they trust their child to be responsible, with one in ten (11%) stating that they do not have parental controls because their child is normally supervised.

Some parents do not use parental controls on the fixed games console, either because they don't know how to do this, or are not aware that it is possible. Being unaware of parental controls in either of these ways accounts for one in five (20%) parents of 5-15s who do not have parental controls in place, and this is comparable across each of the three age groups of children. There are no differences in reasons for not having controls in place by the gender of the child. Parents in DE households are more likely to say they don't know how to set controls on fixed games consoles (10% vs. 6%).

Figure 89: Reasons for not having parental controls on the fixed games console, by age: 2011

NQP46F– And can you tell me why that is? (spontaneous responses, multi-coded) – only responses shown where>4% of all parents have given that answer
Base: Parents of children aged 5-15 who have not set parental controls on the fixed games console connected to a television (1019 aged 5-15, 283 aged 5-7, 363 aged 8-11, 373 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Rules about the internet

Four in five parents have rules in place about their child's internet use

Four in five parents of children aged 5 -15 who use the internet at home (82%) say they have put in place any of the internet rules that we asked about. Rules about the internet are more common for children aged 5-7 (89%) and 8-11 (88%) than for those aged 12-15 (72%).

The rule relating to the parent regularly checking what their child is doing online is in place among half of all parents of an 8-11 year old child (52%), compared to 44% of parents of 5-7s and 38% of parents of 12-15s. There are no other rules in place among the majority of parents of children in any age group.

Seven of the twelve rules are more likely to be in place for children aged 5-7 or 8-11 than for 12-15s: only children's websites, only allowed to use the internet for a certain amount of time, can only use when supervised/ not on their own, no social networking websites, no

instant messaging/ MSN, only use for homework and only websites stored in their Favourites list.

There are few differences by gender. Parents of boys aged 12-15 are more likely than parents of girls to have the rule relating to no purchasing from websites (31% vs. 20%). Neither the overall incidence of having rules in place, nor the incidence of any individual rule for home internet use, varies according to the household socio-economic group.

There are a number of differences compared to 2010. Parents of 5-7 year old children are now more likely to have a rule in place relating to the parent regularly checking what the child is doing online (44% vs. 36%), no purchasing from websites (26% vs. 16%), only allowed to use the internet for a certain amount of time (32% vs. 21%), can only use the internet when supervised and not on their own (41% vs. 31%), no social networking websites (33% vs. 18%) and no instant messaging/ MSN (24% vs. 14%).

Parents of 8-11s are more likely than in 2010 to say their child can only use the internet when supervised and not on their own (26% vs.20%) and no social networking websites (31% vs. 24%).

Figure 90: Parental rules for the internet, by age: 2011

	Aged 5-7	Aged 8-11	Aged 12-15
Any rules or restrictions	89%	88%	72%
Regularly check what they're doing online	44% ↑	52%	38%
No internet after a certain time	31%	37%	31%
No purchasing from websites	26% ↑	31%	26%
Only children's websites	50%	25%	5%
Only allowed to use the internet for a certain amount of time	32% ↑	30%	22%
Can only use when supervised/ not on their own	41% ↑	26% ↑	8%
Only talk/ chat with friends/ people they already know	13%	18%	16%
No social networking websites	33% ↑	31% ↑	9%
PIN/ Password required to enter websites unless already approved	18%	21%	14%
No Instant Messaging/ MSN	24% ↑	18%	4%
Only websites stored in their Favourites list	13%	11%	5%
Only use for homework	8%	9%	4%

QP24 Do you have any of these rules or restrictions about the access that your child has to the internet? (prompted responses, multi-coded)
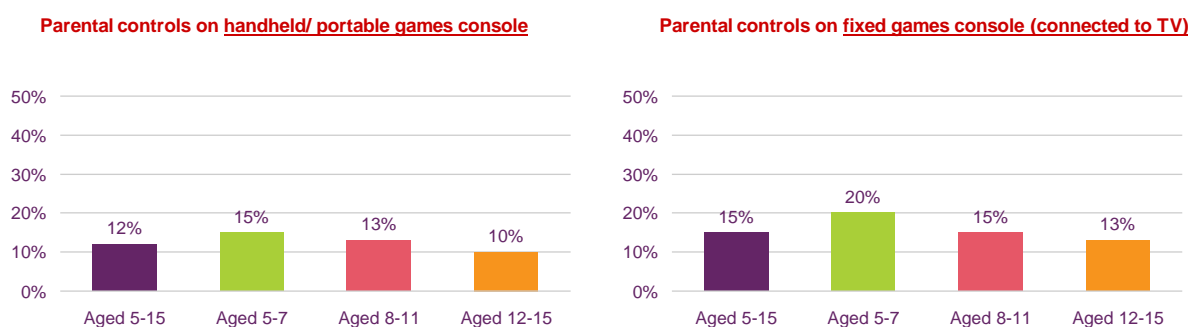Base: Parents of children aged 5-15 whose child uses the internet at home (396 aged 5-7, 496 aged 8-11, 529 aged 12-15) Significance testing indicates any differences between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Figure 91 below shows the incidence of having any of these internet rules in place, since 2007. Between 2010 and 2011 parents of 5-7s and 12-15s became more likely to have any rules in place (89% vs. 80% for 5-7s and 72% vs. 66% for 12-15s). There has been no change over this time period in the overall incidence of rules among parents of 8-11s.

While there has been a change between 2010 and 2011 among parents of 5-7s and 12-15s, the overall trend for internet rules between 2007 and 2011 among all three age groups of children is relatively stable.

Figure 91: Parental rules for the internet, by age: 2007-2011
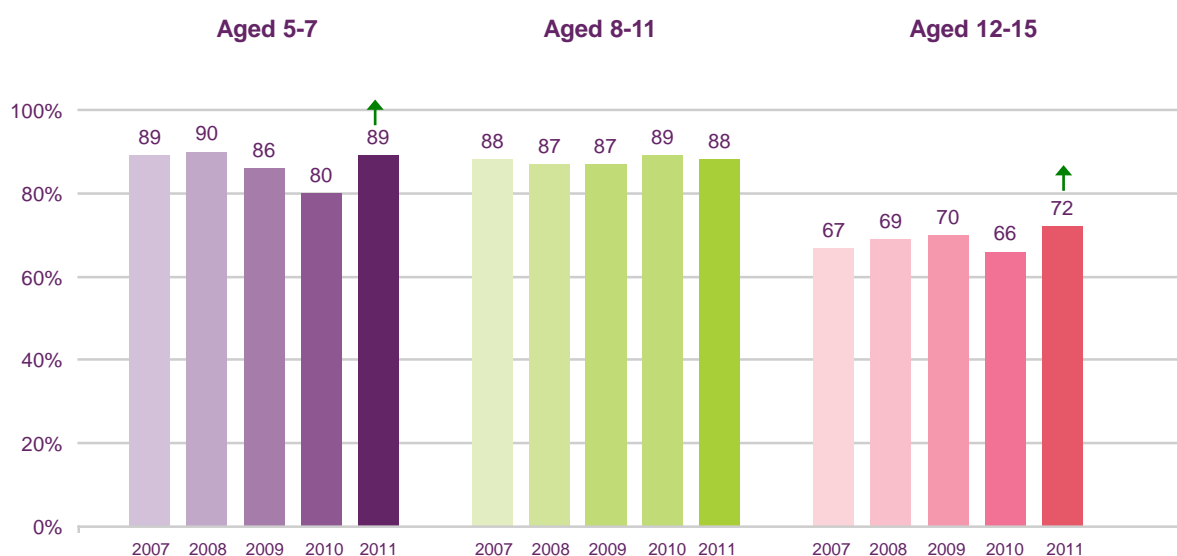
Aged 5-7   **Aged 8-11**   **Aged 12-15**

QP24 - Do you have any of these rules or restrictions about the access that your child has to the internet? (prompted responses, multi-coded)
Base: Parents of children aged 5-15 who use the internet at home(VARIABLE BASE) – significance testing shows any differences within age between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Rules about parental supervision of the internet

Figure 92 shows the proportion of parents who say they either have the rule about regularly checking what their child is doing online, or the rule that their child can only use the internet when supervised and not when they are on their own. By combining the responses of parents who have either of these rules, it is possible to show an overall measure for rules relating to parental supervision.

Just over half (52%) of all parents of 8-11s say they regularly check what their child is doing online. Parents of 8-11s are more likely to do this than parents of 5-7s (44%) or parents of 12-15s (38%). Among all 5-15s, parents are now more likely to regularly check what their child is doing online than in 2010 (45% vs. 41%). The rule regarding using the internet only when supervised and not on their own decreases with age, with two in five (41%) parents of 5-7s having this rule, compared to one in four of 8-11s (26%), and fewer than one in ten (8%) of 12-15s. Compared to 2010, parents of 5-15s are now also more likely to have this rule in place (21% vs. 16%).

More than half of parents of 5-15s (54%) supervise their child in some way when online, with parents of 5-7s (63%) and 8-11s (61%) being more likely to do so than parents of 12-15s (42%).

Figure 92: Internet rules and restrictions relating to parental supervision, 2011
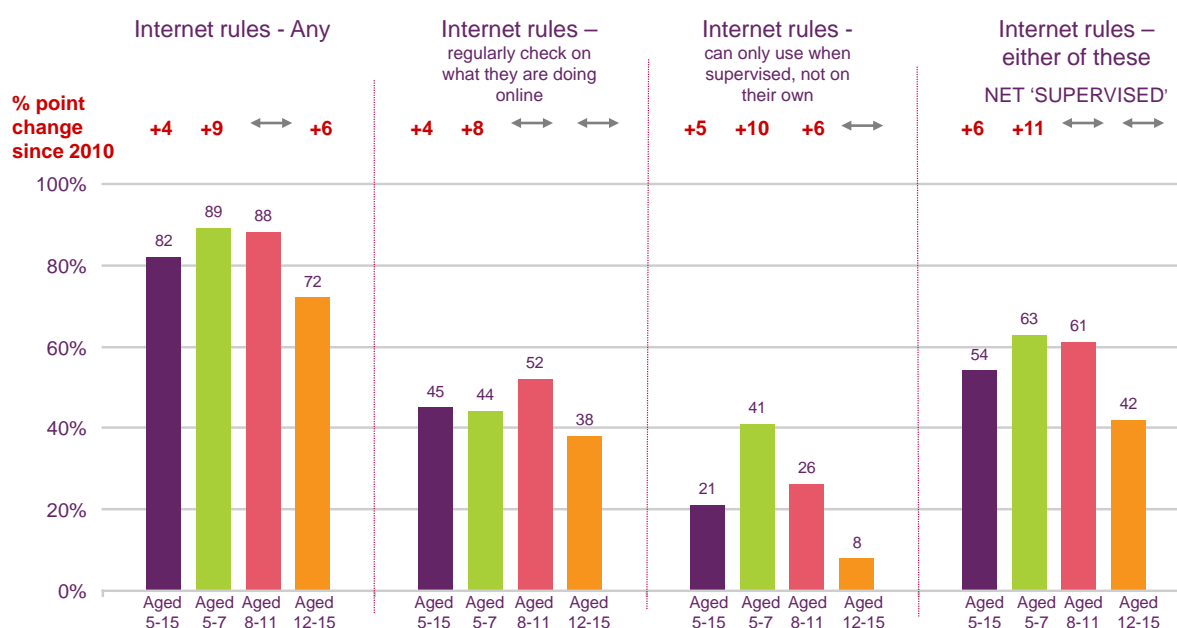
QP9/ QP17 /QP24 / QP37/ QP46 – Do you have any of these rules or restrictions about the (MEDIA) that your child watches/ listens to/ uses?
Base: Parents of children aged 5-15 who use each medium at home (VARIABLE BASE) – significance testing shows any change between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Technical controls on the internet

Internet controls/ filtering software is in place for four in ten children who use the internet at home

Parents of children who use the internet at home were asked whether any controls are set, or any software loaded, to stop their child viewing certain types of website. Four in ten (39%) of all parents of 5-15s who use the internet at home have these controls in place. This is more likely among parents of 8-11s (46%) than among parents of 12-15s (33%). The likelihood of having controls set or software loaded does not vary by the household socio-economic group or by the child's gender.

There has been no change in the incidence of having internet controls or filtering software since 2010.

Figure 93: Internet controls/ filtering software loaded, by age: 2007 - 2011
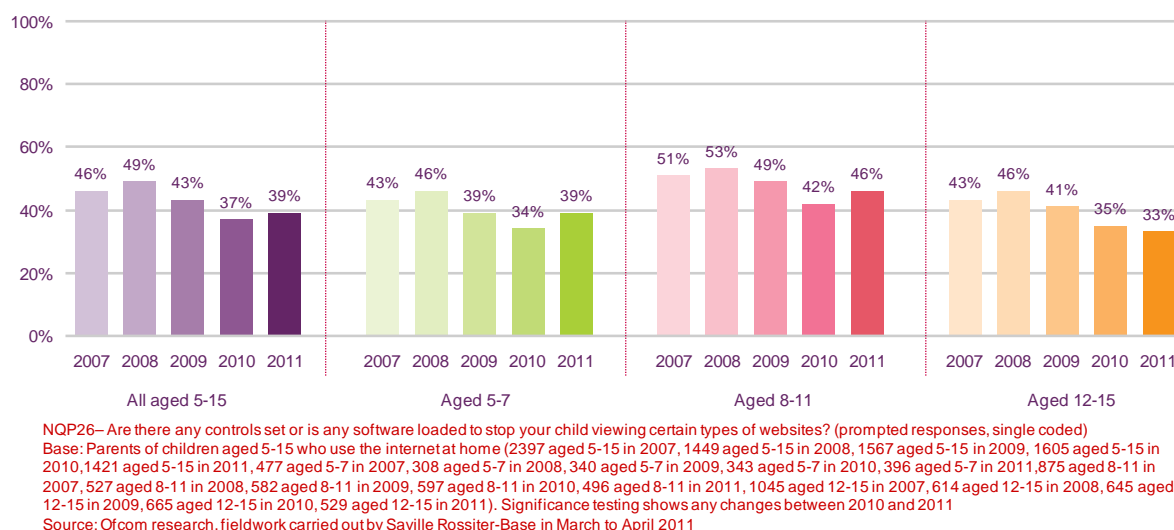
Those parents who do not have internet controls or filtering software were asked to say why (Figure 94). The reasons given tend to differ by the age of the child. The main reason given by around half of all parents of 5-7s (49%) and 8-11s (50%) is that their child is normally supervised when using the internet. Among parents of 12-15s, two in three (64%) say they trust their child to be responsible, with around one in five (16%) stating that they do not set internet controls because their child is normally supervised.

Around one in ten (12%) of parents do not use internet settings or filtering software, either because they don't know how to do this, or are not aware that it is possible. This is comparable across each of the three age groups of children. There are no differences in reasons for not having internet controls in place by household socio-economic group or the gender of the child.

The reasons given by parents for not having these controls in place have not changed since 2010.

Figure 94: Reasons for not having internet controls/ filtering software loaded, by age: 2010 and 2011
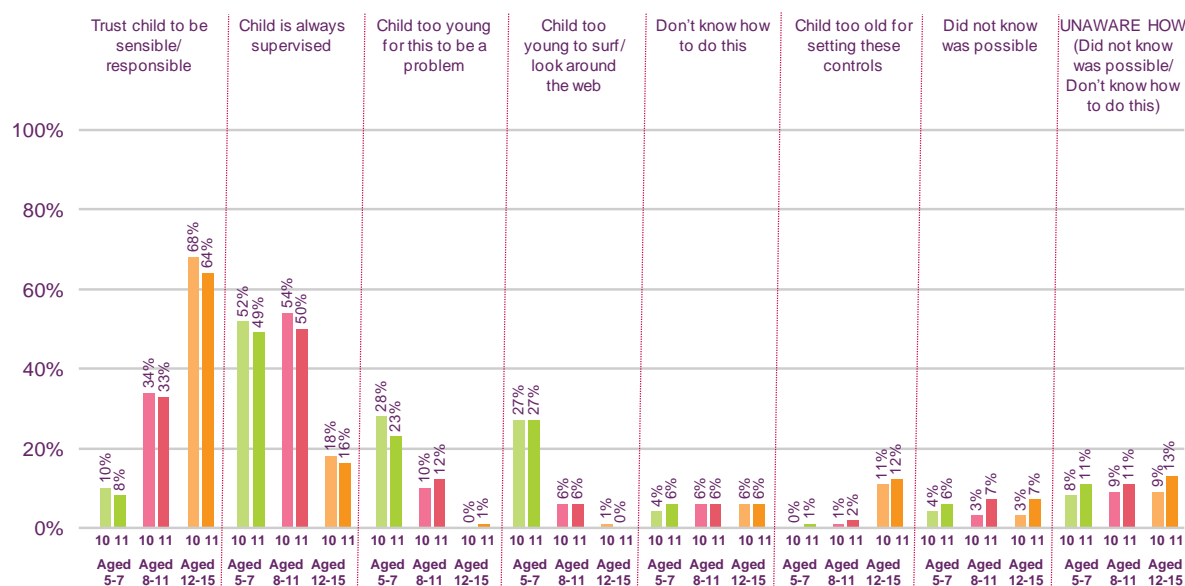
QP27– And can you tell me why that is? (spontaneous responses, multi-coded) – only responses shown where>5% of all parents have given that answer
Base: Parents of children aged 5-15 without any controls set or software loaded to stop their child viewing certain types of websites (210 aged 5-7 in 2010, 230 aged 5-7 in 2011, 313 aged 8-11 in 2010, 238 aged 8-11 in 2011, 402 aged 12-15 in 2010, 319 aged 12-15 in 2011)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

In 2011 parents of children aged 5-15 who use the internet at home were asked whether three other online security measures were in place in the household. Two in three (67%) say they have software to protect against junk email/ spam or computer viruses, one in three (32%) use the 'history' function on the computer to see which websites their child has visited and one in twelve (8%) have software installed to limit the amount of time their child can spend on the internet. Three quarters (75%) of parents have any of these three measures in place.

The incidence of having any of these online security measures in place is mostly consistent across the three age groups of children, but parents of 8-11s are more likely than those of 5-7s to say they use the 'history' function (36% vs. 29%). Responses do not vary depending on the gender of the child, but those in AB socio-economic groups are more likely than all parents to say they use anti-spam/ virus software (76% vs. 67%).

Figure 95: Online security measures in place, by age: 2011

Legend: Aged 5-15 | Aged 5-7 | Aged 8-11 | Aged 12-15

Measure	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Software installed on your PC/ laptop to protect against junk email/ spam or computer viruses	67%	67%	67%	66%
Use the 'history' function to see the websites that your child has visited	32%	29%	36%	30%
Software installed that limits the amount of time that your child can spend on the internet	8%	7%	9%	8%
Any of these	75%	74%	76%	75%
All of these	5%	4%	6%	4%

NQP27A - Which, if any, of the following measures do you have in place?
Base: Parents of children aged 5-15 whose child uses the internet at home (1421 aged 5-15, 396 aged 5-7, 496 aged 8-11, 529 aged 12-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Around half of parents have safe search settings in place

Parents of children aged 5-15 who use the internet at home were also asked whether they had settings that allow only safe searches on search engine websites[79]. Close to half (47%) of parents say they use safe search settings, and this measure does not vary by the age or gender of the child or the household's socio-economic group.

Figure 96: Use of safe search settings on search engine websites, by age: 2010 and 2011

	2010	2011
All aged 5-15	47%	47%
Aged 5-7	42%	44%
Aged 8-11	53%	49%
Aged 12-15	44%	48%
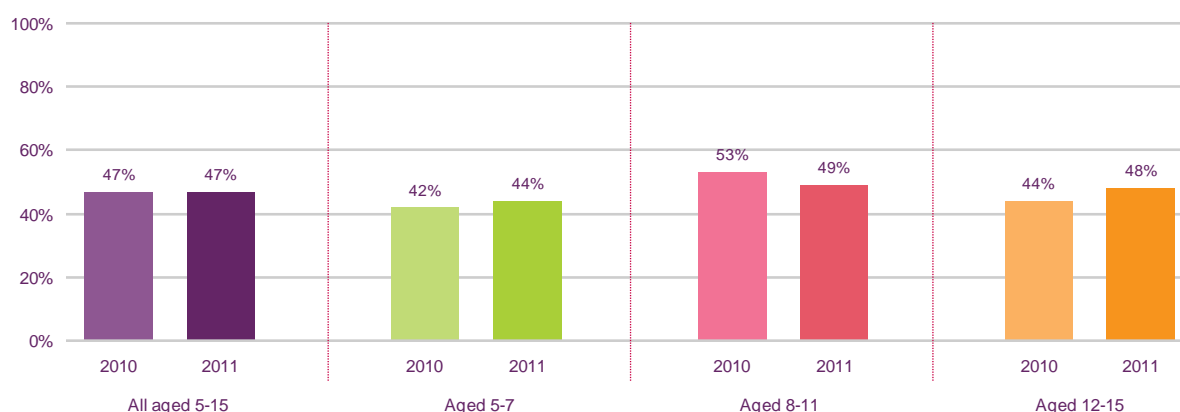
QP28 – Do you have settings that allow only safe searches on search engines such as Google? (prompted responses, single coded)
Base: Parents of children aged 5-15 who use the internet at home (1605 aged 5-15 in 2010, 1421 aged 5-15 in 2011, 343 aged 5-7 in 2010, 396 aged 5-7 in 2011, 597 aged 8-11 in 2010, 496 aged 8-11 in 2011, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011). Significance testing shows any changes between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

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[79] The figures reported for 2010 differ from those published in the 2010 UK children's media literacy report, as it was necessary at that time to rebase the data collected.

Around three in ten parents whose child uses YouTube have the Safety Mode set

Parents of children aged 5-15 who use the internet at home were asked whether their child visits the YouTube website. Six in ten children (58%) visit YouTube, with the likelihood increasing with the age of the child, accounting for two in ten 5-7s (22%), six in ten 8-11s (57%) and eight in ten 12-15s (78%).

Parents of children who visit this site were then asked whether they had enabled YouTube's Safety Mode to prevent their child viewing some videos. Figure 97 shows that slightly fewer than three in ten parents (28%) of a 5-15 year old who visits the YouTube website have Safety Mode set. Parents of 8-11s are more likely to have Safety Mode enabled, compared to parents of 12-15s (32% vs. 24%).

There are no differences in having Safety Mode enabled by gender within age, or by socio-economic group, and these measures have not changed since 2010.

Figure 97: Use of Safety Mode on the YouTube website, by age: 2010 and 2011

NQP28B Have you enabled the Safety Mode on YouTube to prevent your child viewing some videos? (spontaneous responses, single coded)
Base: Parents of children aged 5-15 whose child visits the YouTube website (833 aged 5-15 in 2010, 759 aged 5-15 in 2011, 276 aged 8-11 in 2010, 274 aged 8-11 in 2011, 489 aged 12-15 in 2010, 403 aged 12-15 in 2011) - significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

One in six parents whose child watches/downloads content from UK television broadcasters' websites uses parental controls on these sites

Parents of children who use the internet at home were asked whether their child ever downloads or watches TV programmes or films over the internet[80]. Three in ten children aged 5-15 (31%) now watch television content via UK television broadcasters' websites,

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[80] Compared to the responses given by children (as shown in Figure 29), parents appear to be more likely to say that their child ever watches TV programmes or films online; 21% parents vs. 13% children for 5-7s, 29% vs.18% for 8-11s and 43% vs. 39% for 12-15s. Parents were prompted with examples of the broadcasters' websites (such as BBC iPlayer) while children were not. Children were asked to respond to internet activities shown on a list while parents were asked a direct question about how their child ever watched TV programmes or films. Also, within the list shown to children, the first option asked whether they ever "go to a TV channel's website or to particular TV programme websites" with a later option asking if they ever "watch or download clips or whole TV programmes or films". It is possible that some children responded to the first option in references to sites such as BBC iPlayer.

according to their parents, and the incidence increases with age, accounting for two in ten (18%) aged 5-7, one in four (27%) aged 8-11 and four in ten (41%) aged 12-15. This overall incidence has increased since 2010 (31% vs. 25%) due to an increase among 5-7s (21% vs. 13%). Responses do not vary by the gender of the child or the household's socio-economic group.

Figure 98: Watching television programmes and films online, by age: 2009 - 2011
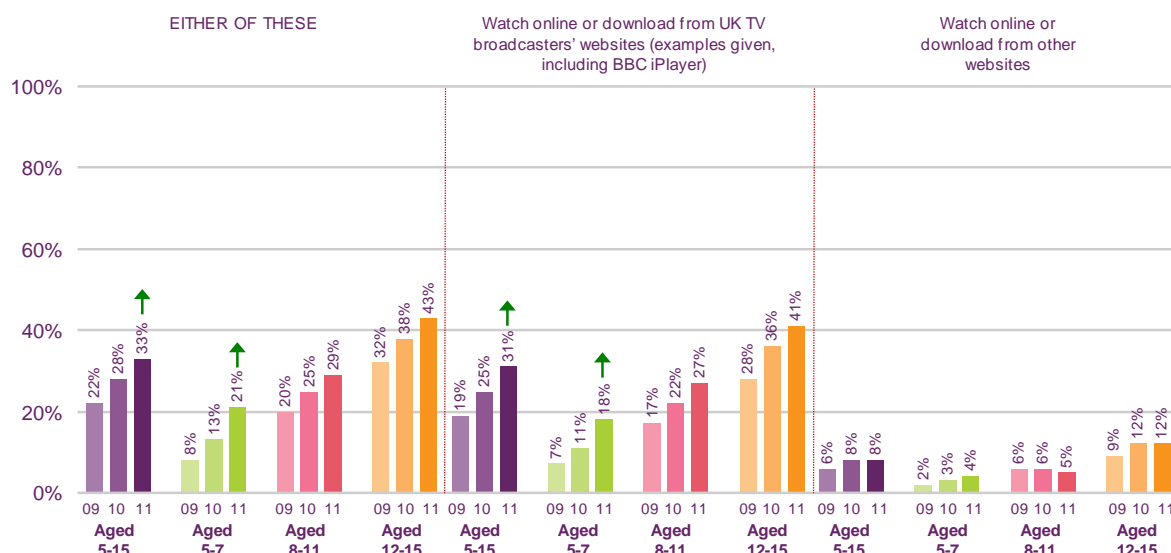
QP31 – Does your child watch TV programmes or films in any of the following ways? (prompted response, multi-coded)
Base: Parents of children who use the internet at home (1567 aged 5-15 in 2009, 1605 aged 5-15 in 2010, 1421 aged 5-15 in 2011, 340 aged 5-7 in 2009, 343 aged 5-7 in 2010, 396 aged 5-7 in 2011, 582 aged 8-11 in 2009, 597 aged 8-11 in 2010, 496 aged 8-11 in 2011, 768 aged 12-15 in 2007, 645 aged 12-15 in 2009, 665 aged 12-15 in 2010, 529 aged 12-15 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parents of children aged 5-15[81] whose child watches/downloads content from UK TV broadcasters' websites were asked whether they were aware that these sites show guidance labels for programmes which may include content unsuitable for young audiences. These parents were also asked whether they had set a PIN or password on any UK broadcasters' websites that their child uses to watch or download TV programmes or films[82].

Three in ten (30%) parents of 5-15s whose child watches/downloads content from UK TV broadcasters' websites are not aware of the guidance labels for programmes, and around two in ten (18%) have set up a PIN/ password on all (10%) or some (7%) of the websites their child uses. As such, just one in four of the parents who are aware of the guidance labels have set up a PIN or password to be used before viewing programmes that have a guidance label (18% among the 70% aware of guidance labels).

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[81] Figure 99 does not show data for 5-7s because of the low base of only 69 parents of children aged 5-7.
[82] The question wording was changed in 2011 and so we cannot show comparable findings from previous years.

Figure 99: Awareness and use of PIN controls on broadcasters' websites, by age: 2011

- ■ PIN/ password set up on all of the websites the child uses for watching/ downloading TV or films
- ■ PIN/ password set up on some of the websites that the child uses for watching/ downloading TV or films
- ■ PIN/ password not set up on any of the websites that the child uses for watching/ downloading TV or films
- ■ Don't know if set up
- ■ Not aware of Guidance labels on programmes

	All set up	Some set up	Not set up	Don't know	Not aware
2011 Aged 5-15	10%	7%	41%	11%	30%
2011 Aged 8-11	12%	8%	39%	13%	28%
2011 Aged 12-15	8%	7%	42%	11%	32%

QP32/33 – Did you know that UK broadcaster's websites like the BBC iPlayer and ITV Player show Guidance labels for programmes that may include content that is unsuitable for young audiences, (such as violence, sex, drug use or strong language)? / Have you set a PIN or password on the UK websites that your child uses to watch or download TV programmes or films – which needs to be entered before viewing programmes that have a Guidance label? (spontaneous responses, single coded) –QUESTION WORDING AMENDED IN 2011
Base: Parents of children aged 5-15 whose child watches TV programmes or movies online / downloaded from TV broadcaster's website (388 aged 5-15, 119 aged 8-11, 200 aged 12-15) – BASE TOO LOW TO SHOW 5-7s
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Overview of types of parental mediation for the internet

While nine in ten households have some type of parental mediation in place, just six in ten use any type of online control

Figure 100 summarises each of the types of parental mediation that have been covered in this section, based on all parents of 5-15s whose child uses the internet at home.

As previously reported, eight in ten parents have any rules for their child relating to the internet (82%) and seven in ten (67%) have software loaded in order to protect against email spam or viruses. Fewer than half have any of the individual online controls to limit the content that can be accessed online. Across each of the different types of online mediation, nine in ten (94%) households have at least one type in place.

Figure 100: Types of mediation in place in households where a child aged 5-15 uses the internet at home: 2011
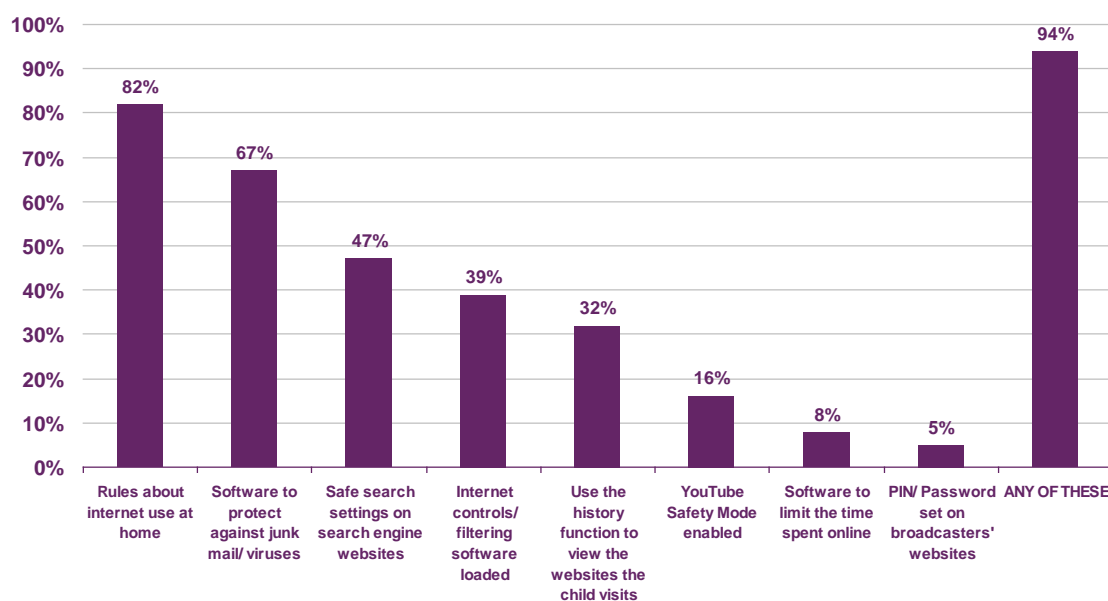
Figure 101 summarises the incidence of the four online controls that we asked parents about, and shows that six in ten (59%) households with children aged 5-15 who use the internet at home have at least one type in place. As shown in Figure 101 below, there are some differences by age for some of these four individual online controls. For example, children aged 8-11 are more likely than 12-15s to have internet controls/ filtering software and 8-11s and 12-15s are both more likely than 5-7s to have YouTube SafetyMode enabled. However, the incidence of having any of these four measures in place does not vary by the age of the child (56% for 5-7s, 62% for 8-11s and 57% for 12-15s).

Figure 101: Types of online control in place in households where a child aged 5-15 uses the internet at home: 2011
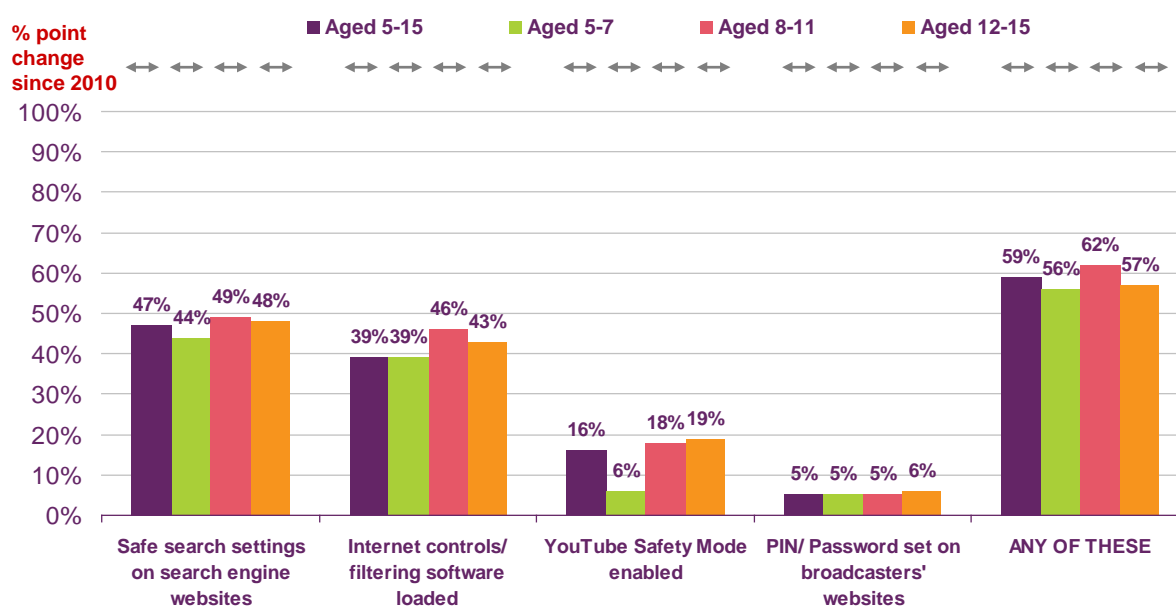
Figure 102 also shows whether each individual control is used in isolation by parents or used in combination with any of the other types of control. So, while close to half (47%) of parents of 5-15s use safe search settings on search engine websites, one in seven (14%) use only this type of control, with the remainder (33%) using safe search settings along with any other online controls. Similarly, while two in five parents (39%) use online controls/ filters, fewer than one in ten (7%) use only these controls.

This shows that those using *only* each type of control are always a minority of those using that control.

Figure 102: Types of online control in place in households where a child aged 5-15 uses the internet at home, 2011
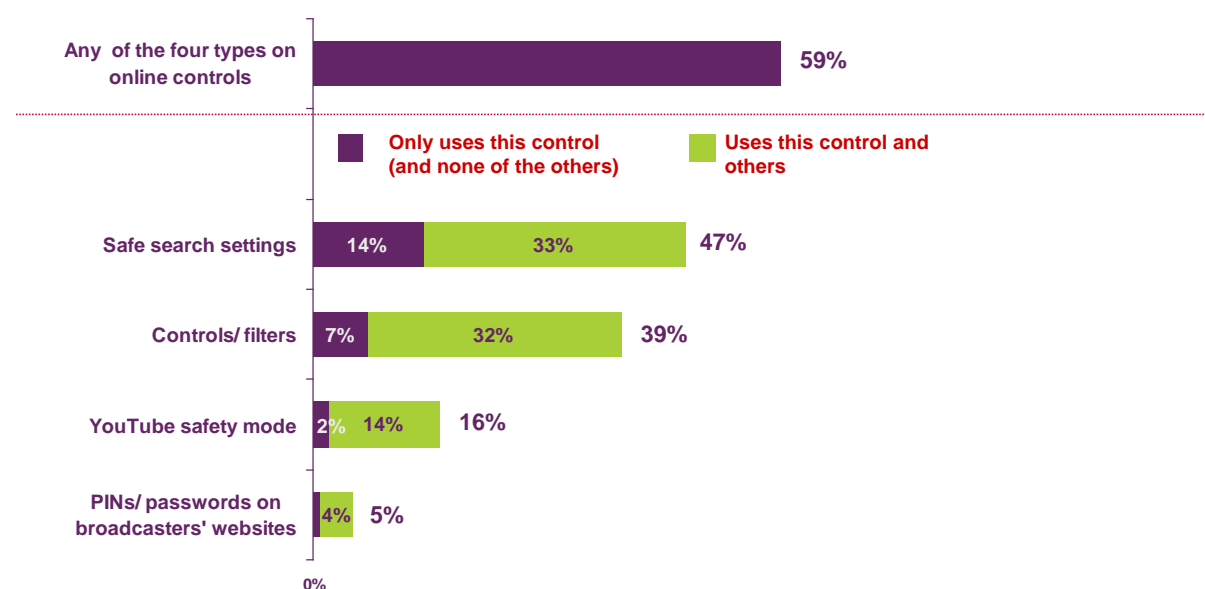
Base: Parents of children aged 5-15 whose child uses the internet at home (1421 aged 5-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Figure 103 expands further on this analysis and shows how combinations of these four types of online controls are used by the three in five parents that use any of them. Fewer than one in twenty parents (2%) use all four types of control, with a further one in ten (10%) using any combination of three of the four controls, and close to one in four (23%) using any combination of two of the four controls.

This therefore shows that among all parents of 5-15s who use the internet at home, slightly more than one in three (36%) use two or more of the four controls. There are no differences by household socio-economic group.

Figure 103: Combinations of types of online control use in households where a child aged 5-15 uses the internet at home: 2011
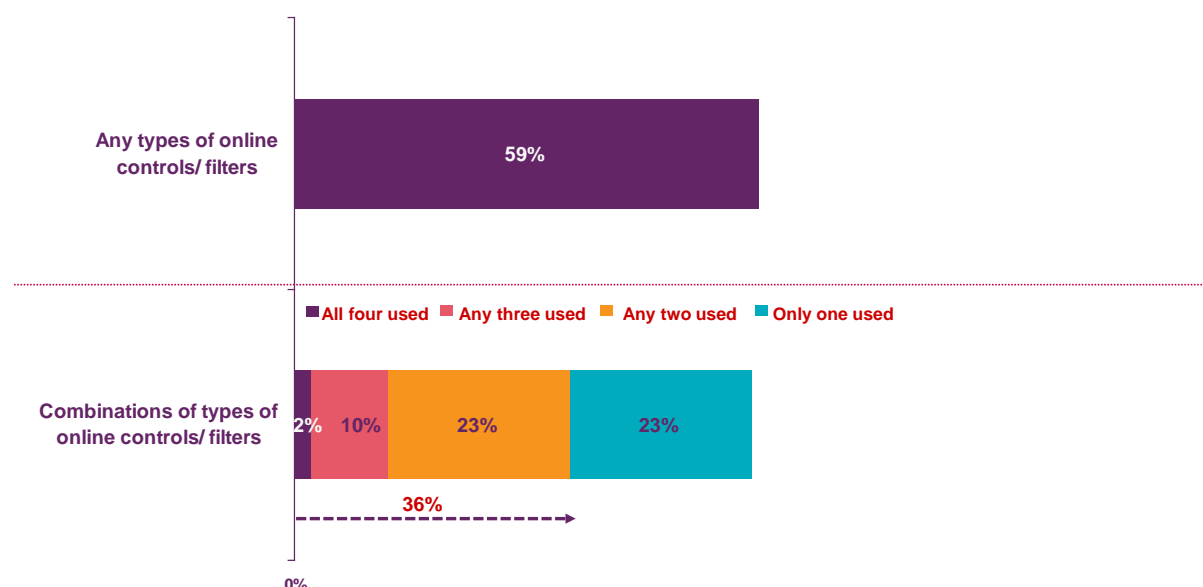
Base: Parents of children aged 5-15 whose child uses the internet at home (1421 aged 5-15)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Parental guidance about online safety

Around four in five parents of a child aged 5-15 who uses the internet at home have spoken with their child about staying safe online

Parents of children aged 5-15 who used the internet at home were asked "Have you talked to your child about staying safe when they are online?" and "Generally speaking, do you feel you know enough about how to help your child stay safe online?"

Figure 104 shows that eight in ten parents of 5-15s who use the internet at home (83%) say that they have spoken to their children about staying safe online. This overall incidence increases with the age of the child, accounting for close to six in ten parents of a 5-7 year old (58%), nearly nine in ten parents of 8-11s (86%) and over nine in ten parents of a 12-15 year old (93%). Responses do not vary by the gender of the child within each age group or by the household's socio-economic group. These incidences are unchanged since the question was first asked in 2010.

Figure 104: Parents who have spoken to their child about staying safe online, by age and gender: 2011

All aged 5-15	83%
Aged 5-7	58%
Aged 8-11	86%
Aged 12-15	93%
Boys aged 5-7	58%
Girls aged 5-7	58%
Boys aged 8-11	85%
Girls aged 8-11	87%
Boys aged 12-15	92%
Girls aged 12-15	94%
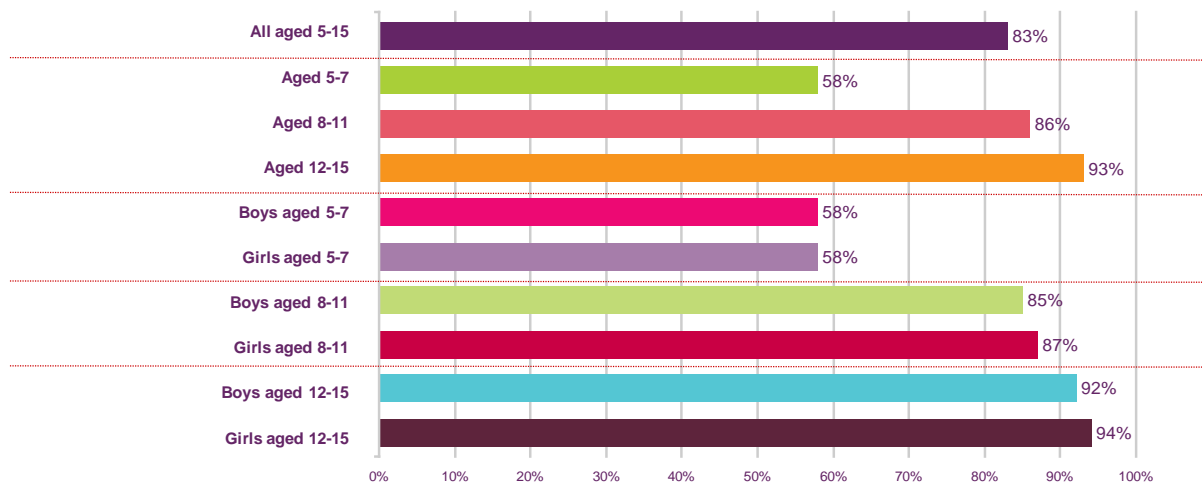
NQP33A – Have you talked to your child about staying safe when they are online? (spontaneous responses, single coded)
Base: Parents of children aged 5-15 whose child uses the internet at home (1421 aged 5-15, 396 aged 5-7, 496 aged 8-11, 529 aged 12-15, 185 boys aged 5-7, 211 girls aged 5-7, 252 boys aged 8-11, 244 girls aged 8-11, 255 boys aged 12-15, 274 girls aged 12-15**)**
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Figure 105 shows that eight in ten (82%) parents of children aged 5-15 feel they know enough about how to help their child stay safe online. This measure varies by the age of the child, with parents of children aged 12-15 being less likely than parents of 5-7s to say they are knowledgeable(79% vs. 86%). Responses do not vary by the gender of the child within each age group or by the household's socio-economic group. These incidences are unchanged since the question was first asked in 2010.

Figure 105: Parents who feel they know enough about how to help their child to stay safe online, by age and socio-economic group: 2011

	Yes	No	Don't know
All aged 5-15	82%	15%	3%
Aged 5-7	86%	12%	3%
Aged 8-11	82%	15%	3%
Aged 12-15	79%	17%	3%
AB	85%	12%	3%
C1	84%	14%	2%
C2	80%	17%	3%
DE	77%	18%	5%
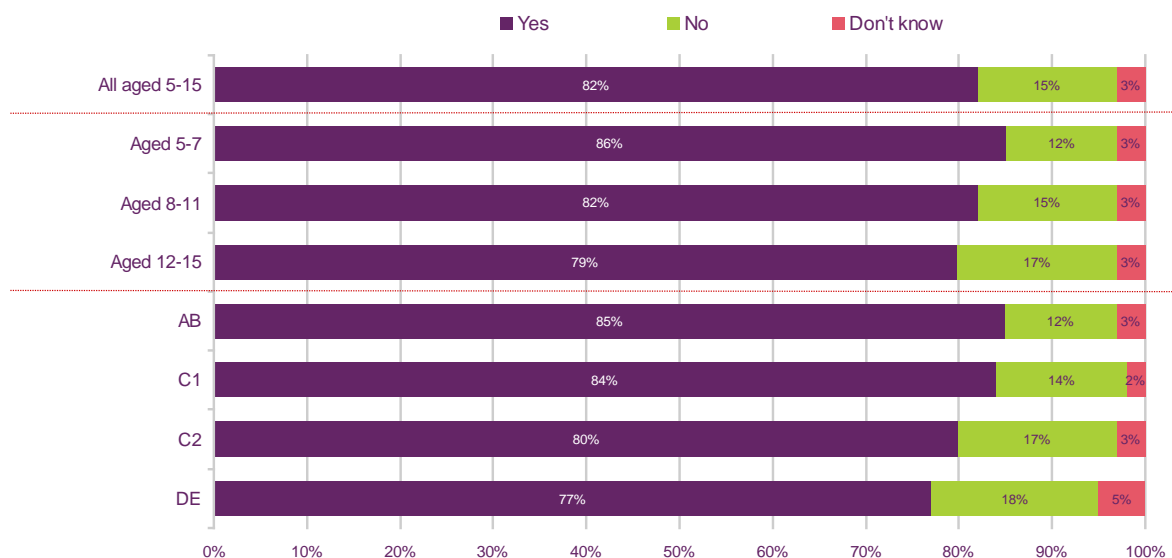
NQP33B – Generally speaking, do you feel you know enough about how to help your child to stay safe when they are online? (spontaneous responses, single coded)
Base: Parents of children aged 5-15 whose child uses the internet at home (1421 aged 5-15, 396 aged 5-7, 496 aged 8-11, 529 aged 12-15, 357 AB, 422 C1, 274 C2, 368 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

Nine in ten children aged 8-15 say they have been given information about staying safe online

Children aged 8-15 who use the internet at home or elsewhere were asked whether they had ever been given any information or advice about staying safe online. Those who said they had were asked who had given them the advice. Nine in ten children aged 8-11 (92%) recall receiving such advice, as do nearly all 12-15s (96%).

For both age groups this information is most likely to be recalled as being from a teacher, with this response more likely among 12-15s than 8-11s (78% vs. 72%). Around two-thirds in each age group recall receiving this information from a parent[83] (66% for 8-11s, 67% for 12-15s). Other sources for this information are nominated by fewer than one in ten children in either age group, with 12-15s more likely than 8-11s to recall receiving information or advice from friends (8% vs. 3%) or from websites (4% vs. 1%). Fewer than one in ten children say they have not been given any information or advice (7% for 8-11s, 4% for 12-15s).

There are no differences in the overall incidence of receiving any advice, or in the sources of advice, when looking at the child's gender by age. Children aged 8-15 in DE households are less likely to recall receiving advice from a parent (57% vs. 66%). These incidences are unchanged since the question was first asked in 2010.

Figure 106: Children stating they have been given any information or advice about staying safe online, by age: 2010 and 2011
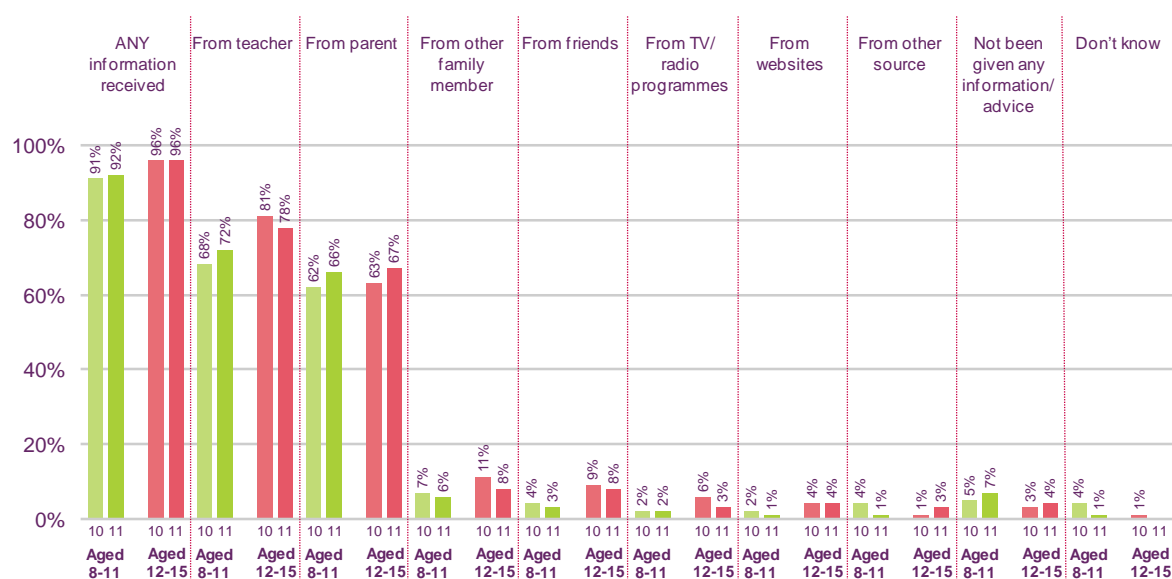
NQC28 – Have you ever been given any information or advice about how to stay safe when you are online? (spontaneous responses, multi-coded)
Base: Children aged 8-15 who use the internet at home or elsewhere (698 aged 8-11 in 2010, 563 aged 8-11 in 2011, 737 aged 12-15 in 2010, 550 aged 12-15 in 2011) – significance testing shows any difference between 2010 and 2011
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

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[83] These incidences are lower than those reported at Figure 104. This could be attributable to the different way in which the question was asked of parents (directly) and of children (indirectly).

The interplay of controls, rules and supportive guidance

Two in five parents use all three online mediation strategies at home

Figure 107 shows the relationship between three types of mediation that parents may choose to use at home with regard to their child's use of the internet, and shows the interplay of supportive guidance, technical tools/ controls[84] and rules or restrictions relating to parental supervision.

More than one in four (27%) parents use all three of these types of mediation, so have controls, and have rules relating to parental supervision, and have talked to their child about staying safe online. In contrast, one in twenty parents (5%) do not use any of these three elements. Around one in five parents (18%) have rules in place relating to parental supervision and have talked to their child about staying safe online but do not use any of the four types of online controls.

Parents of 8-11s are more likely than parents of 5-7s and 12-15s to use rules, controls and supportive guidance (34% for 8-11s, 22% for 5-7s and 22% for 5-7s). Similar proportions of parents across all three age groups of child have rules in place and have talked to their child but do not use controls. Nearly one in four parents of 12-15s (23%) have *only* talked to their child about staying safe online; higher than for 5-7s (7%) or 8-11s (10%). Children aged 5-7 are more likely than 8-11s and 12-15s not to have any of the three types of mediation in place (9% for 5-7s vs. 3% for 8-11s and 3% for 12-15s).

There are no differences by household socio-economic group.

Figure 107: Combinations of online mediation strategies used by parents of 5-15s who use the internet at home, by age: 2011
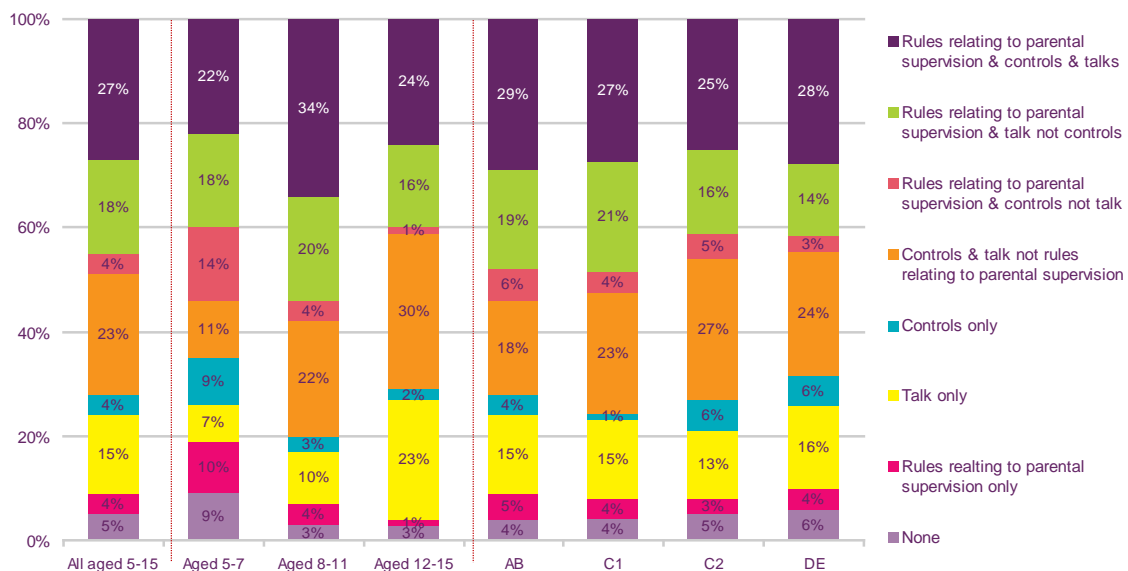
Base: Parents of children aged 5-15 whose child uses the internet at home (1421 aged 5-15, 396 aged 5-7, 496 aged 8-11, 529 aged 12-15, 357 AB, 422 C1, 274 C2, 368 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2011

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[84] Use at least one of the four types of online controls shown in Figure 101.

The relationship between rules about online parental supervision and children's attitudes and behaviours

Analysis indicates a relationship between parental rules about online supervision and some online behaviours

Having looked in more detail at the types of online mediation strategies adopted by parents and the interaction between them, it is useful to examine whether a relationship exists between rules about parental supervision or online controls, and the child's online behaviour and attitudes.

In terms of the way in which they access the internet, children aged 8-11 without rules about supervision are more likely than those with rules to have PC/ laptop-based internet access in their bedroom (21% vs. 13%), with children aged 12-15 without rules being more likely to ever go online at home via a mobile phone (34% vs. 24%). Children aged 12-15 without rules about online supervision are more likely to mostly use the internet in their bedroom (40% vs. 27%) and to spend more time online in a typical week (15.6 hours vs. 13.9 hours). However, children in both age groups without rules about online supervision are no more likely to mostly use the internet alone.

12-15s without rules about supervision are more likely to say they would miss the internet the most if it were taken away (30% vs. 20%) and are more likely to feel that sharing copyrighted material should not be illegal (50% vs. 36%). 12-15s without rules about supervision are more likely to say they are very confident at finding what they want when they go online (67% vs. 55%) and are also more likely to feel very confident as an internet user (70% vs. 54%).

There are some differences in the online activities undertaken at least weekly, with children aged 8-11 without supervision rules being more likely to use the internet for general surfing (45% vs. 31%), while children aged 12-15 without supervision rules are more likely to use Instant Messaging services at least weekly (50% vs. 36%). Both 8-11s and 12-15s without supervision rules are more likely to have active social networking site profiles (34% vs. 24% for 8-11s and 80% vs. 69% for 12-15s) and are more likely to visit social networking sites at least weekly (27% vs. 17% for 8-11s and 78% vs. 67% for 12-15s).

There appears, therefore, to be a relationship between the presence or absence of rules relating to parental supervision and the ways in which the child accesses the internet at home and the activities undertaken online.

Children aged 12-15 without rules relating to online parental supervision are no more likely to have:

- added people to their contacts that they've onlyhad contact with online;
- sent people they only know online personal information/ photos or videos;
- set their social networking site profiles to be more visible; and
- contacted people through their social networking profiles that may not be known to them.

This therefore suggests that there is no relationship between rules about online supervision and the child's likelihood to undertake some types of risky behaviour online.

Children aged 8-11 and 12-15 without rules relating to personal supervision are also no more or less likely to say they have personal experience of being bullied online.

In terms of risks relating to online content, children aged 8-11 without rules about online parental supervision are no more likely to say that they have seen something online in the past twelve months that they consider to be worrying, nasty or offensive. Interestingly, however, children aged 12-15 without rules relating to parental supervision are less likely to say they have seen something of this nature in the past 12 months (9% vs. 18%)[85]. Children aged 8-11 and 12-15 without rules relating to personal supervision are also no more or less likely to say that they have seen something of a sexual nature, either online or on a mobile phone.

There is only one difference in concerns among children aged 8-11 - those with these rules are more likely than those without these rules to feel more concerned about seeing things online that make them feel sad, frightened or embarrassed (18% vs. 10%). This difference does not exist among 12-15s. Among those aged 12-15 with an active social networking profile, children without rules about online supervision are more likely to be concerned about strangers finding out information about them (38% vs. 23%).

The relationship between online controls and children's attitudes and behaviours

Online controls appear less likely than rules about parental supervision to influence children's attitudes and behaviours

There are fewer differences in online attitudes and behaviours between children with and without any of the four online controls, than was the case for children with and without rules about parental supervision online.

12-15s without any of the these four types of controls are more likely than those with controls to say that they use social networking sites for contact with people not directly known to them (34% vs. 17%), to say that they feel more confident online than in real life (27% vs.17%) and to agree that it's easier to keep things secret or private online than in real life (32% vs. 22%).

Children without controls are no more likely to say that they have seen something worrying, nasty or offensive in the past year.

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[85]While this may seem counter-intuitive it could be attributable to factors such as a child with rules being more aware of such content. Alternatively, they could have a more sensitive disposition or be more concerned generally about such content. The rules about supervision could also have been put in place by a parent as a direct result of their child encountering such content online.

Research into parents' and teenagers' opinions and concerns on pre-watershed television programming[86]

1.1   Introduction

This research explores in detail the type of concerns that parents may have about pre-watershed TV content, and the types of programmes that may generate such concern. It also details concerns among teenagers in these areas.

This research was carried out to help inform Ofcom's planned updating of the guidance to the Broadcasting Code. Fieldwork took place in July 2011 among parents/carers of children aged 0 -17 and also among teenagers aged 12-17.

To provide useful background context to the issues dealt with in this research, we also detail in this document a summary of results from Ofcom's regular Media Tracker research[87], focusing on parents' opinions on television, and analysis of BARB data[88] on children's music video channel viewing.

Summary of key findings

- The majority (58%) of all parents surveyed[89] were not concerned by the types of programming their children had watched on television before 9pm in the previous 12 months. Thirty-four per cent of parents were 'not at all concerned' and 24% of parents were 'not very concerned'. The level of concern was lower among younger parents, parents whose eldest child was aged 0-3 or 16-17, and those in socio-economic groups C2DE.

- A third (33%) of all parents surveyed expressed some level of concern regarding the programming their children had seen on TV before 9pm in the past 12 months. Nine per cent (9%) were 'very concerned' and 24% 'fairly concerned'. The level of concern was higher among older parents, parents whose eldest child was aged 10-14, and ABC1s.

- The top spontaneous (unprompted) concerns among all parents surveyed were: violence (20%), sexually explicit content (17%), offensive language (17%), content unsuitable for younger people/children (9%), and generally unsuitable content of a

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[86] This research was first published in September 2011 as part of Ofcom's guidance on the TV watershed.

[87] Ofcom's Media Tracker is a UK representative survey of approximately 2,100 adults (aged 16+) conducted twice a year (April and October). The survey explores attitudes and opinion towards various media including television and radio. Thirty per cent of the sample are parents.

[88] British Audience Research Board.

[89] A total of 1054 parents were surveyed. As a weighted base, this represents 1175 parents.

sexual nature (9%). When all mentions of anything sexual were aggregated, the total figure for all parents concerned about any sexual content was 21%[90].

- The top five types of programming causing concern among all parents surveyed were: soaps (14%), films (14%), reality programmes (12%), music videos (11%) and drama (7%).

- Of the 33% of all parents surveyed who expressed concern regarding the programming their children had seen on TV before 9pm, 70% said they switched off or switched over as a result of seeing something concerning for their child. This compared with the 28% who said they discussed the issue with their child and the 4% who said they made a complaint.

Parents: music video concerns

- As a total of all parents surveyed, 11% had concerns about programming that had been shown on TV in the past 12 months and mentioned music videos as a type of programming that caused concern. The level of concern regarding music videos was higher among parents aged 35-44, female parents, parents whose eldest child was aged 10-14, and ABC1s.

- The top spontaneous (unprompted) concerns regarding music videos, as a percentage of all parents, were: sexually explicit content (6%), overtly sexual performance (6%), offensive language (5%), nakedness/naked body parts (5%), generally unsuitable content of a sexual nature (4%) and violence (4%). When all mentions of anything sexual were aggregated the total figure for *all* parents concerned about any sexual content in music videos was 10%[5].

- Seventy-two per cent of the parents with a concern about their child's pre-watershed viewing said they switched off or switched over as a result of seeing something concerning for their child. In addition, 30% said they discussed the issue with their child, and 8% said they made a complaint.

Teens: music video concerns

- The majority of teens (66%) surveyed[91] said they had not seen any programming on TV before 9pm in the previous 12 months that had made them uncomfortable or they had found offensive**[92]**.

- Just under a quarter (23%) of teens said they had seen programming on TV before 9pm in the previous 12 months that had made them uncomfortable or they had found offensive.

- The top spontaneous (unprompted) concerns measured as a percentage of all teens were: sexually explicit content (7%), offensive language (4%), violence (4%), nakedness/naked body parts (2%), news (1%) and animals being killed/mistreated (1%). When all mentions of anything sexual are aggregated, the total figure for sexual content concerns among all teens was 8%.

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[90] This aggregated figure is made up of the number of parents that gave at least one of the following responses: sexually explicit content, overtly sexual performances, nakedness, and generally unsuitable content of a sexual nature.
[91] A total of 768 teens were surveyed.
[92] Respondents were reminded to think of the things they watch on TV during the day and evening up until 9pm, throughout the survey.

- The top types of programme causing concern, measured as a percentage of all teens are: films (7%), soaps (6%), reality TV (5%), music videos (4%) and drama (4%). These are followed by documentaries (3%) and news (2%).

- Over half (51%) of teens surveyed either switched off or switched over if they saw something uncomfortable or offensive. Just under half (48%) said they discussed it with their family and/or friends. Sixteen per cent (16%) said they continued watching and 14% said they did nothing.

- As a total of all teens surveyed, 4% had concerns about programming which had been shown on TV in the previous 12 months, and mentioned music videos as a type of programming causing concern. This totalled 28 teens in our survey.

- It is not possible to report reliably on the detail of the offence within music videos because of the small base size of teens concerned. Only 28 teens were concerned, of the 768 teens surveyed. However, the data do indicate that sexual content and offensive language are among the items that cause offence.

Parents' views of the watershed and regulation

- According to our Media Tracker research (2010), over three-quarters (77%) of parents believed the 9pm watershed is at about the right time. This compared with 10% who felt it was too late and 12% who said that it was too early.

- A similar proportion of parents (73%) thought that the amount of regulation of television was 'about right'. This compared with 3% who thought there was too much regulation of television, and 13% who thought there was too little.

1.2 Ofcom research 2011: parents' opinions on their children's viewing of pre-watershed television programming

Objectives and methodology

This section details the research commissioned by Ofcom to understand the views of parents regarding their children's television viewing before 9pm. It was designed to complement what we already know, from the Media Tracker analysis, about parents' views on what they watch themselves, by adding insight into parents' opinions on the programming their children watch. The core purpose of the research was to understand the scale and depth of concerns among parents regarding pre-watershed programming, with a particular interest in music videos.

The research covered the following areas:

Pre-watershed programming:
- the proportion of parents with concerns with regard to pre-watershed programming and their children's viewing;
- the nature of their concerns;
- the type of programme causing concern; and
- parents' response to their child being exposed to inappropriate content.

Music videos:
- the proportion of parents with concerns regarding music videos;
- the nature of their concerns; and
- their response to their child being exposed to inappropriate content.

The data come from a face-to-face interviewer-administered omnibus survey conducted among a representative sample of 1054[93] GB parents/carers of children aged 0-17. The omnibus survey was run by Kantar Media as part of the TNS CAPI (computer aided personal interviewing) omnibus. Fieldwork took place between 22 July and 2 August 2011.

In the introduction to the survey the following introduction was read out: *'I'd like to ask you about your views on what is shown on TV nowadays and the types of programmes your children watch. By children, I specifically mean children aged 17 or younger. I would like you to think about TV programmes that are on during the day and evening up until 9pm'.* Throughout the survey, respondents were also reminded to think of the programming that their children watch on TV during the day and evening up until 9pm.

In addition to the parents' survey, Ofcom commissioned a similar survey among children/teens aged 12-17 using the TNS online teens omnibus survey. This was an online self-completion survey. This survey was run among a representative sample of 768 children/teens over the same period. For simplicity, the 12-17 age group sample is referred to as 'the teen sample' throughout this section.

A similar questionnaire was used for both the parents' and the teens' surveys. The differences in methodology should be noted (face-to-face versus online) because this means that direct statistical comparisons cannot be made between the two data sets.

Detailed findings: parents' opinions on pre-watershed programming

<u>The majority of parents (58%) were not concerned by the programming their children had watched on television in the previous 12 months (Figure 1)</u>

Parents were asked the following question: *"Thinking about your child's/children's television viewing in general, how concerned are you, if at all, by the types of things your child/children has seen on TV in the past 12 months?"* The question used a prompted response with a four-point scale, offering 'very concerned', 'fairly concerned', 'not very concerned' and 'not at all concerned' as response options.

Thirty-four per cent (34%) of parents were 'not at all concerned' and 24% of parents were 'not very concerned' about their child's pre-watershed viewing in the past 12 months. A further 9% stated either that they 'don't know' or said their child "does not watch much TV nowadays". Levels of concern were significantly lower (as measured by higher numbers of those parents expressing they were 'not at all concerned') among younger parents (aged 16-34), C2Des, and parents whose eldest child was at the younger age range (aged 0-3) or older age range (aged 16-17).

Nine per cent (9%) of respondents said they 'very concerned' and 24% 'fairly concerned' about their child's pre-watershed viewing. Levels of concern were significantly higher (as measured by those parents saying they were 'very/ fairly concerned') among older parents, parents whose eldest child is aged 10-14 and those in ABC1 households.

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[93] The parent data are weighted to ensure they are representative of the GB population. The weighted base is 1175.

Figure A1.1: Level of concern among parents regarding children's pre-watershed viewing
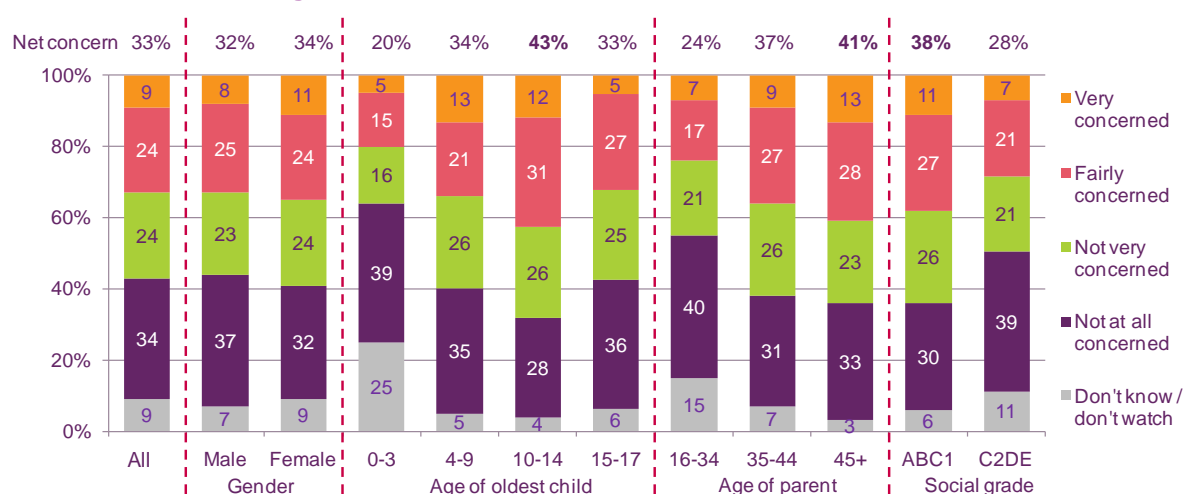
Source: Ofcom omnibus research, July 2011

QP1 I'd like to ask you about your views on what is shown on TV nowadays and the types of programmes your children watch. By children, I specifically mean children aged 17 or younger. I would like you to think about TV programmes that are on during the day and evening up until 9pm. So, thinking about your child's\children's television viewing in general, how concerned are you, if at all, by the types of things your child\ children has seen on TV in the past 12 months?

Base: All parents (n=1175).

<u>The top three unprompted concerns were violence, sexually explicit content and offensive language (Figure 2)</u>

Parents were asked what concerned them about their child/ children's pre-watershed programme viewing. Responses were unprompted so that they were not influenced by predetermined concerns. Respondents were asked to give as much detail as possible. If they made several comments about the same type of concern, each would be coded separately.

Looking at the data as a proportion of *all parents* surveyed, one in five (20%) expressed concerns about violence, one in six (17%) were concerned about sexually explicit content, and one in six (17%) were concerned about offensive language. Just under one in ten (9%) of all parents mentioned unsuitable content for younger people/ children and generally unsuitable content of a sexual nature. Three per cent (3%) reported being embarrassed by watching some content with their children, and 3% reported being embarrassed by watching some content with other adults. When all mentions of anything sexual are aggregated, the parents referencing sexual content concerns totalled 21%[94].

When looking at the data as a proportion of those parents who were concerned about their child's pre-watershed viewing (33% of all parents surveyed), the figures for the top five unprompted concerns among these parents are: violence (59%), sexually explicit content (51%), offensive language (51%), unsuitable content for younger people/children (26%), and generally unsuitable content of a sexual nature (25%). When all mentions of anything sexual are aggregated, the net figure for parents with any sexual content concerns was 62%[7].

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[94] The aggregated figure is made up of the number of parents who gave at least one of the following responses: sexually explicit content, overtly sexual performances, nakedness, and generally unsuitable content of a sexual nature.

Figure A1.2: Type of concern among parents regarding children's pre-watershed viewing of programmes

Concerned parents: 33%

Base: All parents (1175) **Base: All parents with concerns (393)**

Concern	All parents	With concerns
Violence (in general)	20%	59%
Sexually explicit content	17%	51%
Offensive language	17%	51%
Unsuitable content for younger people	9%	26%
Generally unsuitable content of a sexual nature	9%	25%
Overtly sexual performances	7%	22%
Nakedness	6%	17%
Unsuitable content aired too early	5%	14%
Discriminatory treatment or portrayal of people	4%	12%
Embarrassed/Not comfortable watching with my child	3%	9%
Embarrassed/Not comfortable watching with other adults	3%	9%
Invasion of/not respecting privacy	3%	8%

Source: Ofcom omnibus research, July 2011

QP2 What kinds of things concern you about the things your child/children sees on TV? Again, I would like you to think specifically about things that your child/children watch during the day and evening up until 9pm. DO NOT PROMPT. MULTICODE. Top concerns charted.
Base: All parents (n=1175). Base: All parents very/fairly concerned (n=393).

Soaps and films were the types of programme that caused most concern (Figure 3)

Parents were asked what types of programmes concerned them regarding their child/children's television viewing. This question was prompted with a list of genres/programme types, and respondents could give multiple responses.

When analysing the data as a proportion of all parents, the two types of programme that caused most concern were soaps (14%) and films (14%). These were followed by reality programmes (12%), music videos (11%), drama (7%) and children's programmes (7%).

The corresponding figures among a base of parents concerned about their child's pre-watershed viewing were: soaps (42%), film (42%), reality programmes (35%), music videos (34%), drama (22%) and children's programmes (21%).

Figure A1.3: Genre of programming causing concern regarding children's pre-watershed viewing

Concerned parents: 33%

Base: All parents (1175)   Base: All parents with concerns (393)

Genre	All parents	All parents with concerns
Soaps	14%	42%
Films	14%	42%
Reality programmes	12%	35%
Music videos shown on television	11%	34%
Dramas	7%	22%
Children's programmes	7%	21%
Talent shows	4%	12%
Documentaries	3%	9%
News programmes	3%	8%
General entertainment including quiz…	2%	7%
Magazine style shows	2%	5%
Current affairs	2%	5%
Sports programmes	1%	4%
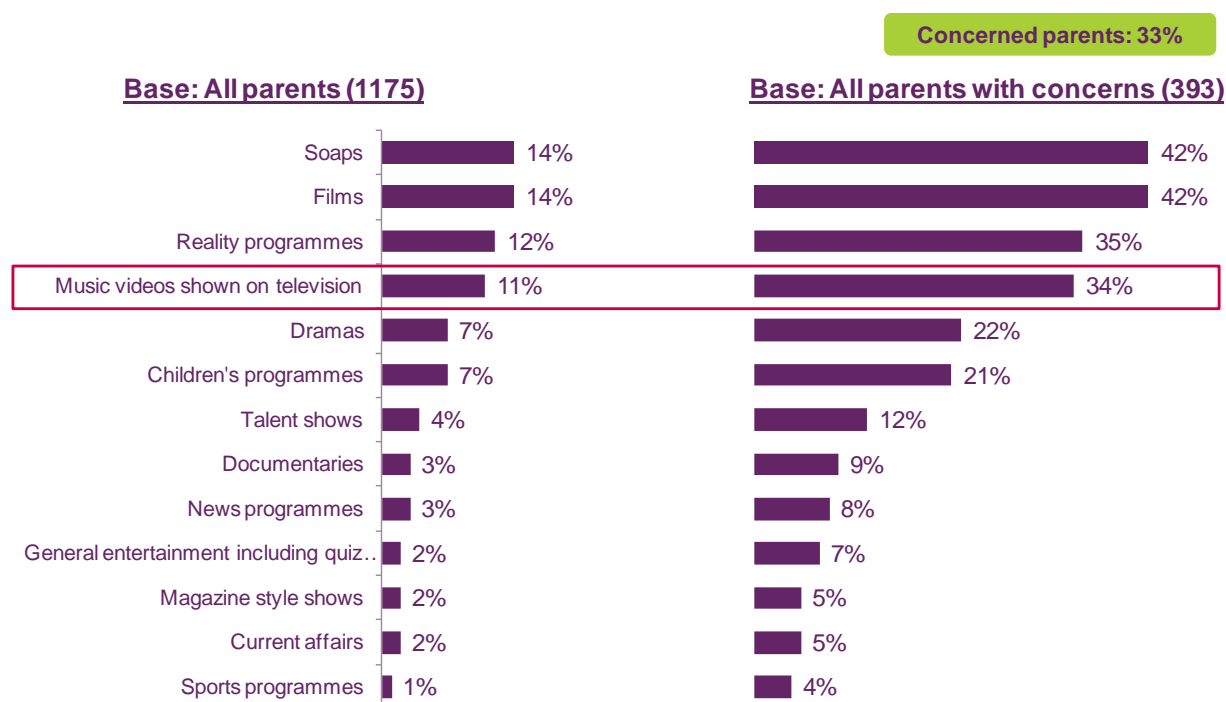
Source: Ofcom omnibus research, July 2011

QP3 What types of programme concern you regarding your child's television viewing? You can say more than one programme type if appropriate.

Base: All parents (n=1175). Base; All parents very/ fairly concerned (n=393).

The most common response to seeing programming on television that causes concern about children's viewing is to switch over/ switch off (Figure 4)

Parents who had concerns about their child's pre-watershed viewing were asked what they did/ how they reacted when they saw programming on television which caused concern about their child/ children's viewing. This question was prompted with a list of possible responses, and respondents could give multiple responses.

When analysing the data as a proportion of all parents surveyed, just under a quarter (23%) said they switched off or switched over as a result of seeing something concerning for their child (16% switch over/ 11% switch off). One in ten (10%) said they discussed the issue with their child, while 4% said they banned future viewing of that programme, and 4% said they blocked access to the channel. Just 1% said they made a complaint.

The corresponding figures among a base of parents who said they had concerns about their child's pre-watershed viewing was 70% who switch off or switch over (47% switch over/ 33% switch off), 28% who said they discussed the issue with their child, 13% who said they banned future viewing of that programme, 11% who said they blocked access to the channel and 4% who said they made a complaint (2% to the broadcaster and 2% to the regulator).

Figure A1.4: Reaction to seeing pre-watershed programming that causes concern

Concerned parents: 33%

Base: All parents (1175) — **Base: All parents with concerns (393)**

Reaction	All parents	With concerns
Ask them to switch over/switch TV over	16%	47%
Ask them to switch the TV off/switch TV off	11%	33%
Discuss it with them	10%	28%
Ban them from watching that programme	4%	13%
Block access to that channel	4%	11%
Complain to regulator	1%	3%
Continue to let them watch/nothing	1%	2%
Complain to broadcaster	1%	2%
Other	1%	2%
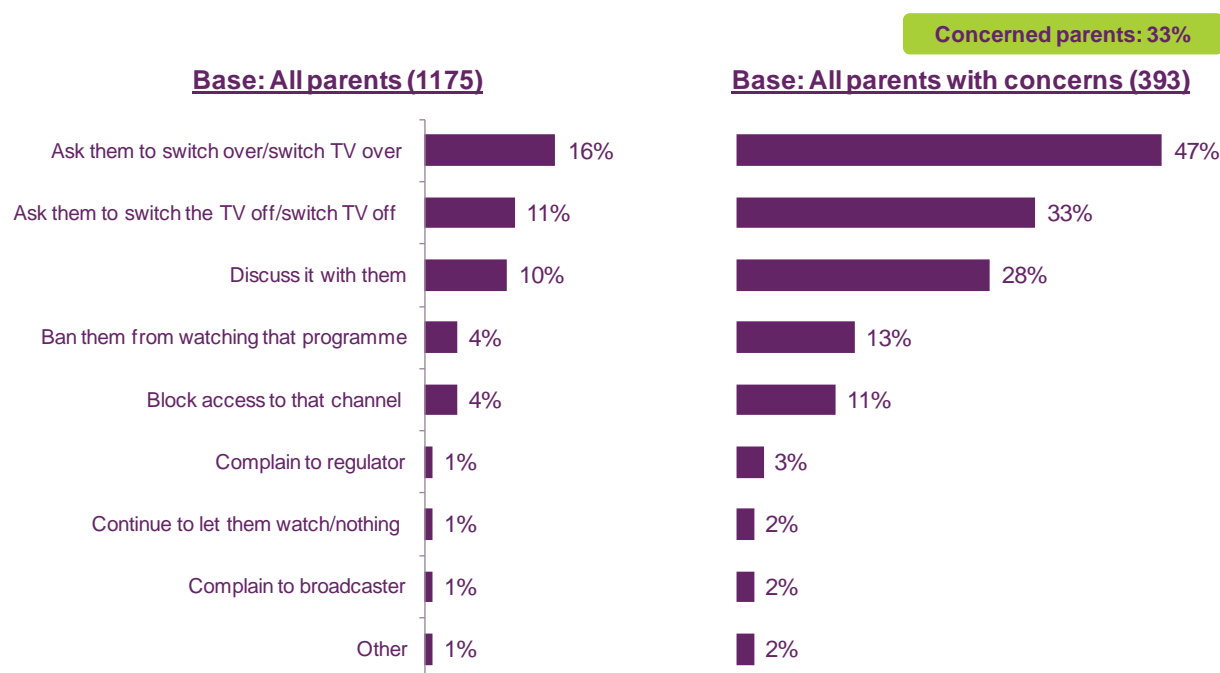
Source: Ofcom omnibus research, July 2011

QP4 How do you react when you see something on TV that your child\children is\ are watching that concerns you? In other words what do you generally do? Again, I would like you to think specifically about things that your children watch during the day and evening up until 9pm.

Base: All parents (n=1175). Base: All parents very/fairly concerned (n=393).

Just over one in ten (11%) parents expressed some concern regarding music videos pre-watershed (Figure 5)

As we have already shown, 33% of all parents expressed some level of concern regarding the programming their children had seen on TV before 9pm in the previous 12 months (see 'net concerned parents' in Figure 1.5 below).

One third (34%) of these parents with concerns mentioned music videos as a genre of programming that caused concern. Therefore, as a total of all parents surveyed, 11% had concerns about music videos shown on TV pre-watershed in the previous 12 months.

Female and ABC1 parents were more likely than males or C2DEs to be concerned about music videos.

Figure A1.5: Core incidence of concerns: summary
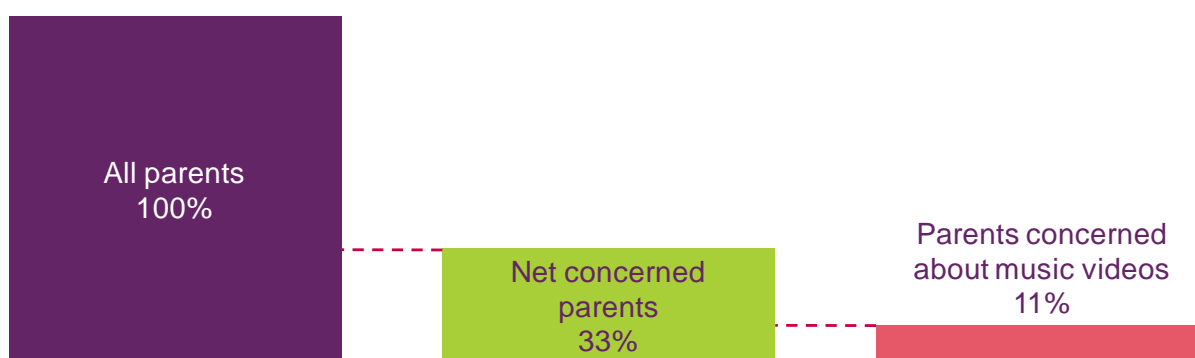
Source: Ofcom omnibus research, July 2011

<u>Music video concerns centred on sexually explicit content, overtly sexual performances and offensive language (Figure 6)</u>

Those parents who gave music videos as a genre of programming that caused them concern were then asked specifically what concerned them about the things their child/ children sees in music videos. Responses were unprompted so that they were not influenced by predetermined concerns, and they were asked to give as many details as possible. If they made several comments about the same type of concern, each comment would be coded separately.

When analysing the responses as a proportion of all parents, one in sixteen (6%) expressed concerns regarding sexually explicit content, and a similar number (6%) expressed concerns about overtly sexual performances. One in twenty (5%) mentioned offensive language and naked bodies/ nakedness. When all mentions of anything sexual are aggregated, the proportion of all parents referencing sexual content in music video totalled 10%[95].

When looking at the same data as a proportion of those parents who said they were concerned about music videos (11% of the total sample), the figures for the top five unprompted concerns are: sexually explicit content (58%), overtly sexual performances (49%), offensive language (47%), naked bodies/ nakedness (42%), and generally unsuitable content of a sexual nature (36%). When all mentions of anything sexual are aggregated, the net figure for parents with any concerns about sexual content within music videos was 88%[96].

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[95] The aggregated figure is made up of the number of parents that gave at least one of the following responses: sexually explicit content, overtly sexual performances, nakedness, and generally unsuitable content of a sexual nature.

[96] The aggregated figure is made up of the number of parents that gave at least one of the following responses: sexually explicit content, overtly sexual performances, nakedness, and generally unsuitable content of a sexual nature.

Figure A1.6: Type of concern regarding children's pre-watershed viewing of music videos

Parents concerned about music videos: 11%

Base: All parents (1175)

Base: All parents with concerns re music videos (133)

Concern	Base: All parents	Base: All parents with concerns
Sexually explicit content	6%	58%
Overtly sexual performances	6%	49%
Offensive language	5%	47%
Nakedness/naked bodies	5%	42%
Generally unsuitable content of a sexual..	4%	36%
Violence (in general)	4%	35%
Unsuitable content for younger..	3%	30%
Negative portrayal/objectification of women	2%	17%
Discriminatory treatment or portrayal of ..	2%	17%
Unsuitable content aired too early	2%	16%
Glamorisation of certain lifestyles	2%	15%
Portrayal of anti-social behaviour	2%	14%
Embarrassed watching with others	2%	14%
Embarrassed watching with children	1%	11%
Invasion of/not respecting privacy	1%	11%
Other	0%	1%

Source: Ofcom omnibus research, July 2011

QP5 You mentioned music videos as one of the things on TV that concerns you regarding your child's\ children's viewing. Thinking specifically about these music videos, what kinds of things concern you? Again, I would like you to think specifically about music videos that your children watch during the day and evening up until 9pm. DO NOT PROMPT. MULTICODE. Top concerns charted.

Base: All parents (n=1175). Base: All parents who express concerns about music videos (n=133).

The most common response to seeing something concerning in a music video that a child is watching is to switch over/ switch off (Figure 7)

Parents were asked how they generally reacted when they saw something that concerned them in a music video that their child/ children was/were watching. This question was prompted with a list of possible options and respondents could give multiple responses.

When analysing the data as a proportion of all parents, fewer than one in ten (8%) said they switched off or switched over as a result of seeing something concerning for their child (6% switch over/ 4% switch off – some did both. Three per cent (3%) said they discussed the issue with their child. Two per cent (2%) said they banned future viewing of that programme and 2% said they blocked access to the channel. Just under 1% said they generally made a complaint.

The corresponding figures, among a base of those parents who said they were concerned about music videos, were: 72% said they switch off or switch over (53% switch over/ 35% switch off – some selected both possibilities), 14% said they discussed the issue with their child, 14% said they banned future viewing of that programme, 5% said they blocked access to the channel, 5% said they made a complaint to the regulator and 4% said they complained to the broadcaster.

Figure A1.7: Reaction to seeing pre-watershed music videos that caused concern

Parents concerned about music videos: 11%

	Base: All parents (1175)	Base: All parents with concerns re music videos (133)
Ask them to switch over/switch TV over	6%	53%
Ask them to switch the TV off/switch TV off	4%	35%
Discuss it with them	3%	30%
Ban them from watching that programme	2%	14%
Block access to that channel	2%	14%
Complain to regulator	1%	5%
Complain to broadcaster	1%	5%
Continue to let them watch/nothing	* Less than 0.5 %	4%
Other	* Less than 0.5 %	1%

Source: Ofcom omnibus research, July 2011

QP6 How do you react when you see something on a music video that you feel concerned about your child seeing? In other words what do you generally do? Again, I would like you to think specifically about music videos that your children watch during the day and evening up until 9pm.

Base: All parents (n=1175). Base: All parents who express concerns about music videos (n=133).

Detailed findings: Teens' opinions on pre-watershed programming

The majority of teens (66%) are not concerned by pre-watershed programming[97] (Figure 8)

Two-thirds (66%) of teens surveyed said 'no' when asked if they had personally seen programming on television before 9pm that made them feel uncomfortable to watch or that they had considered to be offensive in the past 12 months. A further 11% said 'don't know'. There were no significant differences in levels of concern across the sub-groups.

Just under one-quarter (23%) of all teens said they had seen programming that had made them feel uncomfortable or which they had found offensive in the past 12 months. Again, there were no significant differences in levels of concern across the sub-groups.

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[97] Respondents were reminded to think of the programming they watch on TV during the day and evening up to 9pm, throughout the survey.

Figure A1.8: Level of concern regarding pre-watershed programming
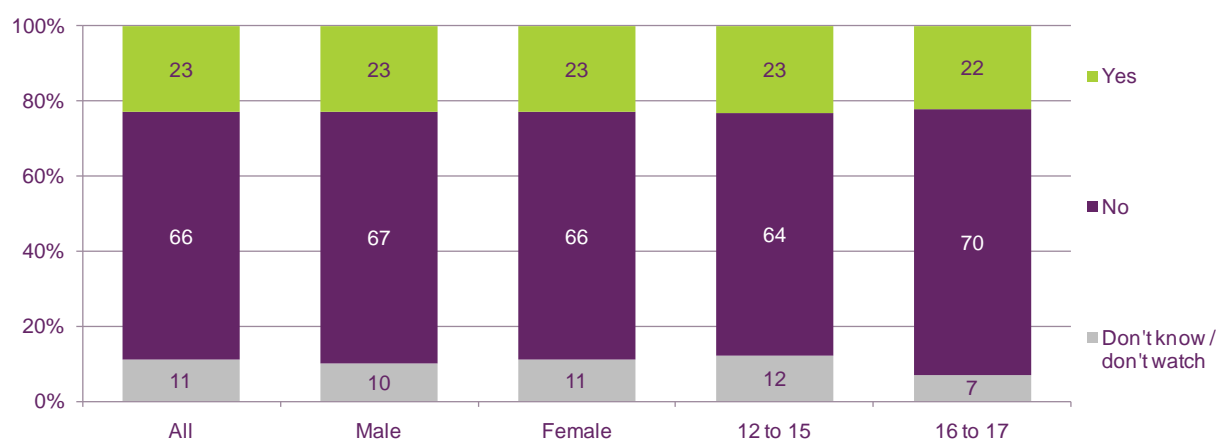
Source: Ofcom omnibus research, July 2011

QT3 Now, we would like you to think about things shown on TV that some people may find uncomfortable or offensive to watch, we would like to ask you how you personally feel about this type of material. Again, we would like you to think specifically about TV programmes that are on during the day and evening up until 9pm. In the past 12 months, have you personally seen anything on television that made you feel uncomfortable to watch or that you considered to be offensive?

Base: All GB teens who watch TV nowadays (n=768)

<u>The top concerns among teens were sexually explicit content, offensive language and violence (Figure 9)</u>

Sexually explicit content was the most common thing that made teens feel uncomfortable or offended (7% of all teens surveyed mentioned this). This was followed by mentions of offensive language (4%) and violence (4%) among all teens surveyed.

When analysing the data as a proportion of teens who said they had seen something uncomfortable or offensive, 28% mentioned sexually explicit content, followed by offensive language (19%) and violence (18%).

Figure A1.9: Types of concern regarding pre-watershed programming

Teens who saw something
uncomfortable/offensive: 23%

Base: All teens (768)

**Base: Teens who saw something
uncomfortable/offensive (176)**

	Base: All teens (768)	Base: Teens who saw something uncomfortable/offensive (176)
Sexually explicit content	7%	28%
Offensive language	4%	19%
Violence (in general)	4%	18%
Nakedness/naked body parts	2%	7%
News	1%	6%
Animals being killed / mistreated	1%	6%
Embarassing bodies	1%	5%
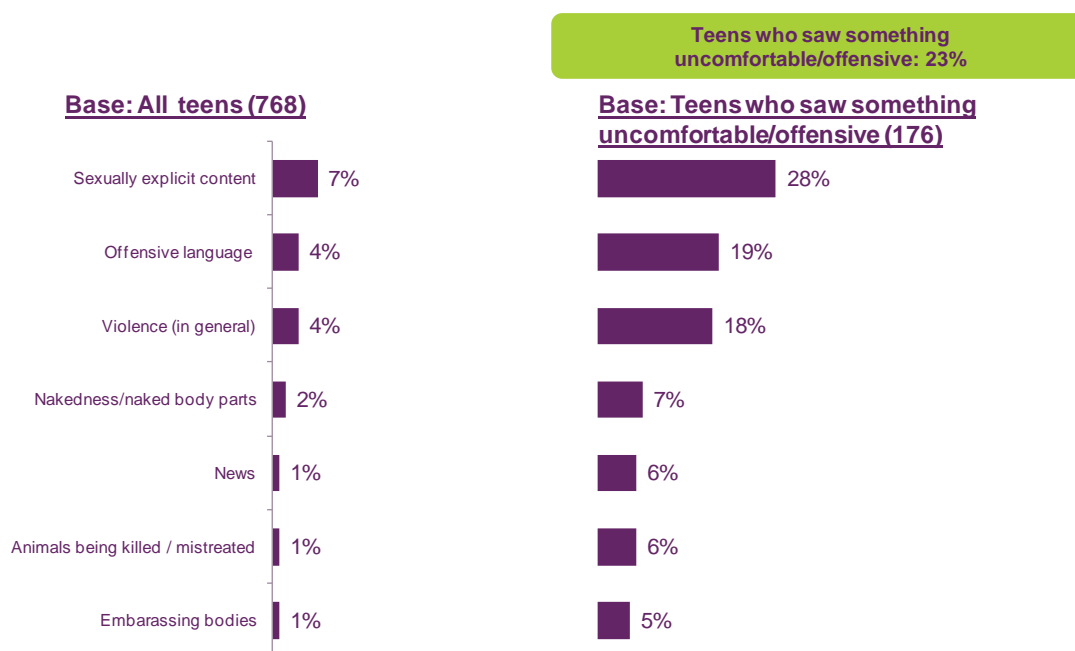
Source: Ofcom omnibus research, July 2011

QT4 What kinds of things that you saw on television made you feel uncomfortable or offended you? (pre-watershed)

Base: All GB teens who watch TV nowadays (n=768) Base: All GB teens who saw something uncomfortable or offensive pre-watershed (n=176).

Film was the most likely genre of programming to cause concern among teens (Figure 10)

Films had caused offence or discomfort to 7% of all teens in the previous 12 months. This was followed by soaps, at 6%, and reality programmes at 5%. Dramas were a concern for 4% of all teens surveyed, as were music videos shown on television, which was the fifth stated genre of programming to cause offence or discomfort.

The corresponding figures among a base of teens who said they had seen something uncomfortable or offensive were*:* films (cited by 31%), soaps (24%), reality programmes (22%), drama (19%) and music videos shown on television (16%).

Figure A1.10: Genres of concern regarding pre-watershed programming

Teens who saw something uncomfortable/offensive: 23%

Base: All teens (768)

Base: Teens who saw something uncomfortable/offensive (176)

Genre	All teens	Teens who saw something uncomfortable/offensive
Films	7%	31%
Soaps	6%	24%
Reality programmes	5%	22%
Dramas	4%	19%
Music videos shown on television	4%	16%
Documentaries	3%	14%
News programmes	2%	9%
Talent shows	1%	6%
General entertainment including quiz...	1%	5%
Sports programmes	1%	3%
Current affairs	1%	3%
Children's programmes	1%	2%
Don't know	3%	14%

Source: Ofcom omnibus research, July 2011

QT5 What type of programme was it? (pre-watershed)

Base: All GB teens who watch TV nowadays (n=768) Base: All GB teens who saw something uncomfortable or offensive pre-watershed (n=176).

The most common response among teens to seeing something concerning is to switch over/ switch off (Figure 11)

When looking at the data as a proportion of all teens surveyed, one in ten (10%) switched over as a result of feeling uncomfortable or being offended by pre-watershed programming on TV in the past year. Discussing it with parents was the second most common reaction, at 8% of all teens. This was followed by discussing it with friends, cited by 6%.

When looking at the data as a proportion of teens who said they had seen something uncomfortable or offensive in programming on pre-watershed TV, 45% switched over, 36% discussed it with parents, 27% discussed it with friends, while 16% continued to watch the programme in question.

Figure A1.11: Reaction to seeing pre-watershed programming that causes concern

Teens who saw something
uncomfortable/offensive: 23%

Base: All teens (768)

Base: Teens who saw something uncomfortable/offensive (176)

	Base: All teens (768)	Base: Teens who saw something uncomfortable/offensive (176)
Switch over	10%	45%
Discuss it with parents	8%	36%
Discuss it with friends	6%	27%
Continue watching	4%	16%
Nothing	3%	14%
Switch off	3%	12%
Complain to regulator	1%	3%
Complain to broadcaster		2%
Don't know		2%

Source: Ofcom omnibus research, July 2011

QT6 How do you react when you see something that concerns or offends you on television? What do you generally do? (pre-watershed)
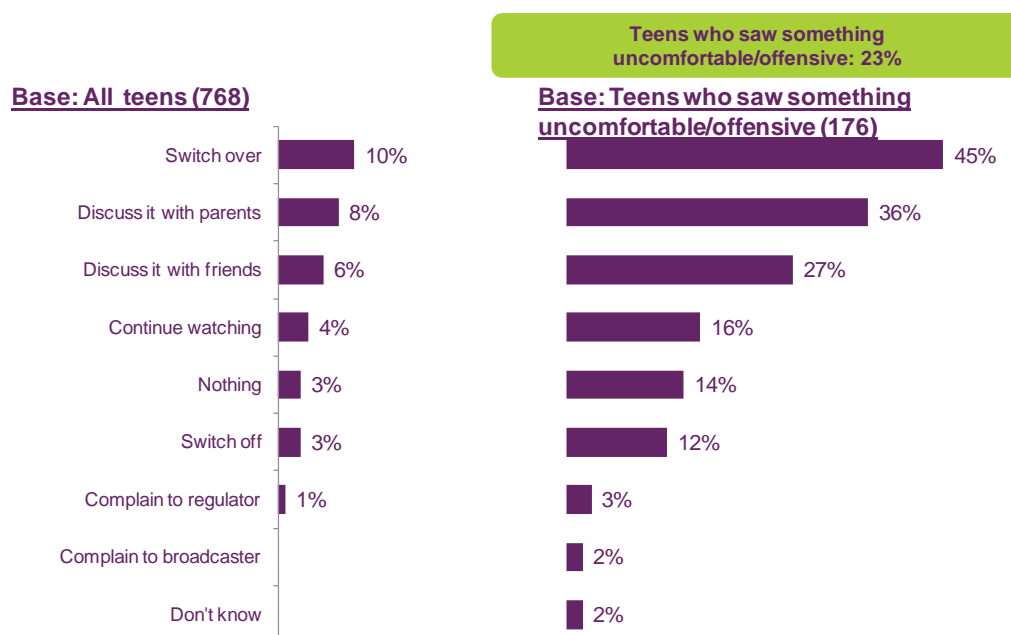
Base: All GB teens who watch TV nowadays (n=768) Base: All GB teens who saw something uncomfortable or offensive pre-watershed (n=176).

Just 4% of teens expressed concern regarding music videos (Figure 12)

As already detailed, 23% of all teens expressed some level of discomfort/ offence regarding what they had seen on TV pre-watershed in the past 12 months. Four per cent of teens mentioned music videos as a genre of concern. This totalled 28 of the 768 teens surveyed.

As the base size of the teens offended by music videos was very small, it is not possible to report reliably on the detail of the offence. However, the data indicate that sexual content and offensive language are among the items which cause offence.

Figure A1.12: Core incidence of concerns: summary

All teens
100%

Teens seeing
something
uncomfortable /
offensive
23%

Teens who music
videos made them
uncomfortable /
caused offence
4%
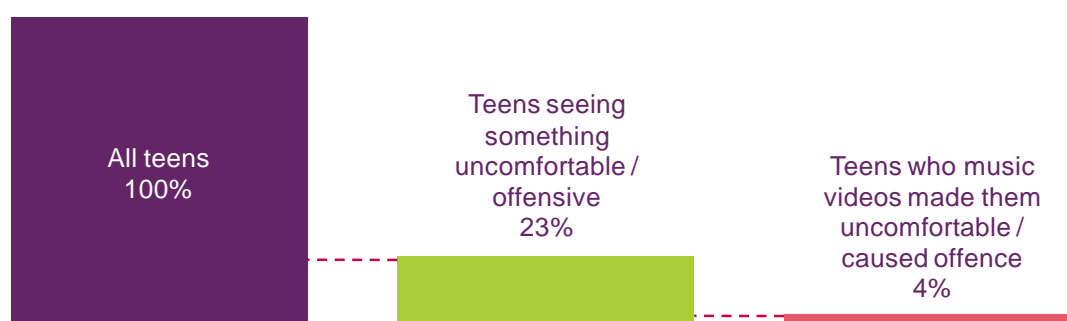
Source: Ofcom omnibus research, July 2011

Music channel viewing: BARB data

According to BARB, music channels represent a small proportion of people's total TV viewing. The 31 music channels we analysed attracted a combined 1.3% share of total television viewing across all individuals (aged 4+) between June 2010 and May 2011, increasing to an average 2.4% share of children's viewing (aged 4-15). Shares among both individuals and children remain consistent when looking at viewing pre- and post-watershed (9pm).

In terms of audience reach to the music channels, which can be seen as an indication of exposure, around three in four individuals (76%) viewed at least three consecutive minutes of any one of the music channels across the 12-month period. Eighty per cent of children watched at least three minutes in the same period.

While a high proportion of people have seen some music channel content across the course of the year, average weekly reach figures (a better proxy for 'regular' exposure) suggest that most viewers watch music channels infrequently. In a typical week, 22% of individuals viewed at least three consecutive minutes, compared to 25% of children. Older children aged 10-15 were more likely to have seen three consecutive minutes than younger children aged 4-9 (31% and 17% respectively). Across all age groups analysed, reach was highest among 16-19 year olds (40% reach). In terms of pre- and post-watershed, weekly reach figures fall sharply after the watershed. Pre-watershed, the average weekly reach for individuals was 17%, compared to 11% post-watershed. Among children, the figures fall much more dramatically – 27% and 9% respectively – and this is reflected in changes across both younger and older children. Among young children, pre-watershed weekly reach was 16% compared to just 5% post-watershed. Across older children, reach falls from 27% to 13%.

In terms of the average audience age profile of these channels, over four in five were adults aged 16+ (83%) while fewer than one in five (17%) were children. This remains consistent throughout the day, with children accounting for relatively greater proportions of the total audience between 6-9am (20%) and 3-6pm (21%). Post-watershed, the proportion of the average audience represented by children tails off significantly (to around 11%), largely due to lower viewing by 4-9 year olds.

1.3   Media Tracker survey

Introduction

This section looks at selected relevant data from Ofcom's 2010 Media Tracker survey, focusing on responses by parents of children under 18. These include opinions on TV programme standards and regulation, as well as television content that respondents considered to be offensive or harmful.

The Media Tracker covers the personal views of respondents on television and is therefore distinct from parents' opinions on the content their children actually watch. The parental results are broadly in line with those for all respondents, and for non-parents (respondents either without children in the household or with children in the household but not parents). It has been highlighted on the charts where there are significant differences between the parent and non-parent samples.

The Media Tracker has a UK-representative quota sample of approximately 2,100 adults (aged 16+), 30% of whom are parents. Interviews are face-to-face, using the paper and pencil (PAPI) interviewing technique, and the questionnaire is conducted in two waves in order to counter seasonality issues. Typically, the first wave is conducted in April and the second wave in October.

Further analysis from the Media Tracker is published as part of Ofcom's annual public service broadcasting (PSB) report. The report, containing further results from the 2010 Media Tracker, is available here: http://stakeholders.ofcom.org.uk/broadcasting/reviews-investigations/public-service-broadcasting/annrep/psb11/

Summary of key findings

- Since 2002 the opinion that programme standards have stayed the same over the past year has tended to increase (from 40% in 2002 to 55% in 2010). This compares to a fall in the numbers stating that standards had got worse (47% in 2002 to 31% in 2010). Those who feel standards have improved have remained fairly constant at around 10-15%.

- Older respondents were more likely to believe that programme standards had deteriorated, with 48% of over-65s stating they felt programme standards had worsened in the past year. Among parents, only 24% of respondents felt that programme standards had become worse, while 16% (significantly higher than non-parents) felt standards had improved.

- The reasons given by parents for worsening standards were led by quantity and quality concerns rather than harm and offence issues. The most common reason was 'more repeats', at 15% of all parents, following by 'lack of variety' (9%), 'too many reality shows' (7%) and 'lack of quality' (also at 7%). 'More offensive language,' more sexual content' and 'more violence' reasons each stood at 2%.

- Over three-quarters (77%) of parents believed the 9pm watershed is about right. This compared with 10% who felt it was too late and 12% who said that it was too early. A similar proportion of parents (73%) thought that the amount of regulation on television was 'about right'. The corresponding figures for all adults are: 74% think the watershed is about right, 8% think it is too late and 13% think it is too early.

- Around one in five parents (19%) say that they have seen something offensive on television in the past 12 months. This figure is the same (19%) for parents and non-

parents. Sex and sexual content, along with offensive language, were the most common causes of offence, cited by 8% and 7% of all parents respectively. Soaps were the most common type of programme to cause offence, at 7% (significantly higher than among non-parents), followed by drama at 6%[98].

- Sixteen per of parents said that they had seen something on television that they considered harmful either to themselves, other adults or children. Parents were more likely than non-parents to say they had seen content harmful to children (14% compared to 9%). Among those who had seen any type of harmful content, over half (9% of all parents) cited violence, followed by anti-social behaviour at 4%.

Opinions on programme standards

<u>Progressively fewer people think that programme standards have worsened (Figure 13)</u>

Looking at the 'all respondents' sample across Media Tracker surveys since 1991, it is possible to see the long-term trend of opinion on programme standards.

Figure 13 shows that since 2002 the opinion that 'programme standards have stayed the same over the past year' has tended to increase (from 40% in 2002 to 55% in 2010) compared to a fall in the numbers stating that standards had got worse (from 47% in 2002 to 31% in 2010). Those who feel standards have improved have remained fairly constant at around 10-15%.

Figure A1.13: Opinions on programme standards over the past 12 months (all respondents): 1991-2010

Source: Ofcom Media Tracker.

Q - Do you feel that over the past year television programmes have improved, got worse or stayed about the same? Base: All respondents. Note: methodologies have varied slightly over time.

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[98] This question did not include music channels in the list of programme genres, although respondents were able to state 'any other' programme.

The view that programme standards are worsening increases with age (Figure 14)

The 2010 survey results on opinions about programme standards by demographic are broken out in Figure 14. This shows a positive correlation between older age groups and the likelihood to say that programme standards have got worse. Nearly half (48%) of over-65s and 41% of 55-64 year olds said that programme standards had become worse, compared to just 20% in the 16-34 age group and 28% for 35-54s.

Parents were less likely to say that standards had fallen, at just under a quarter (24%) compared to a third (34%) of non-parents. Parents, along with the 16-34 age group, were the most likely to view programme standards as having improved over the past year, at 16% and 17% respectively. With the exception of the over-65s, over half of all respondents, across all demographics, believed programme standards had stayed the same over the past year.

Figure A1.14: Opinions on programme standards over the past 12 months, by demographic
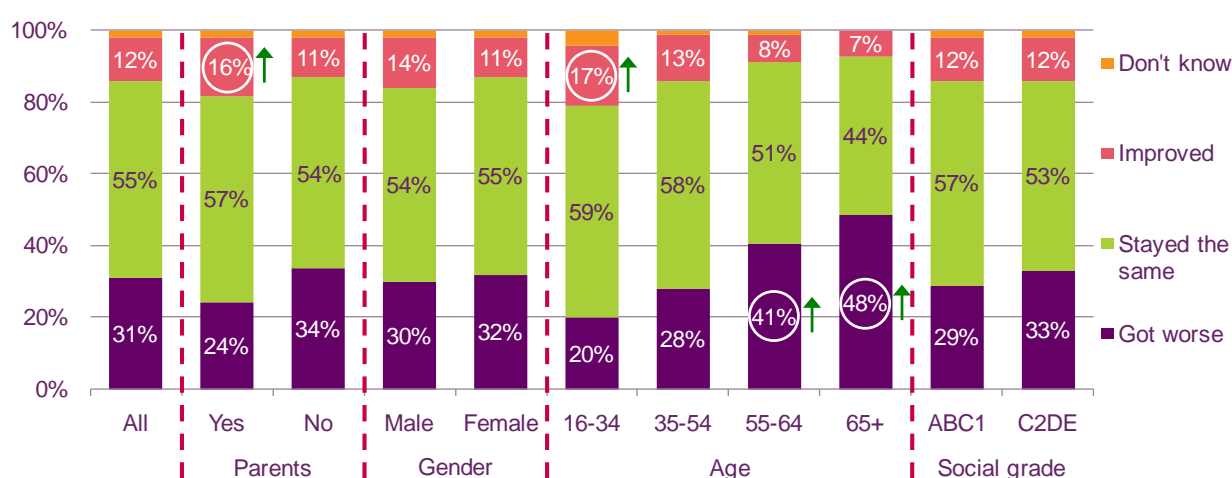
Source: Ofcom Media Tracker 2010.

Q - Do you feel that over the past year television programmes have improved, got worse or stayed about the same? Significant differences to all respondents circled.

Reasons given for worsening standards were predominantly led by quantity and quality rather than harm and offence issues (Figure 15)

Reasons other than harm and offence were behind the belief that standards had worsened (Figure 15). 15% of parents gave 'more repeats' as an unprompted reason for programmes getting worse, while 9% suggested' lack of variety'. Increasing amounts of bad language, violence and sexual content were each mentioned by 2% of those parents, who said programme standards had got worse in the past year.

**Figure A1.15: Top reasons given for programmes getting better or worse**

Base: All parents (652)
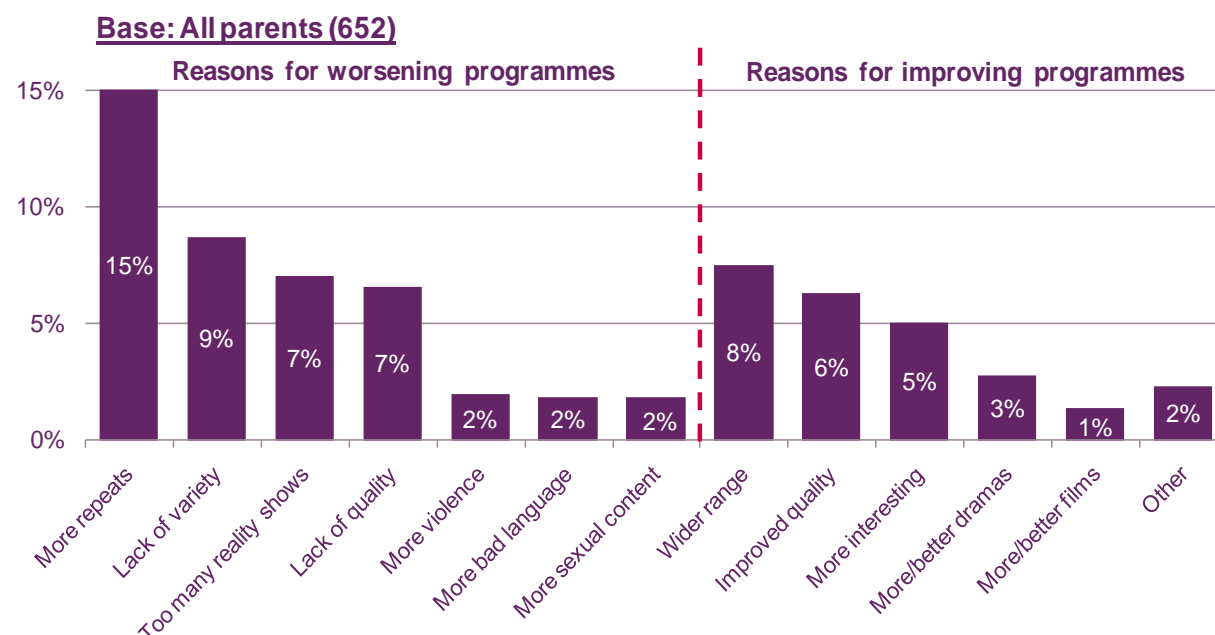
Source: Ofcom Media Tracker 2010.

Q - In what ways do you think that television programmes have got worse/ have improved over the past year? Base: All parents (652). Multicode, unprompted. Top reasons charted. Note: there are no significant differences to non-parents.

Opinions on responsibility and regulation

Over half (55%) of parents stated that broadcasters and parents had equal responsibility for ensuring that children do not see unsuitable programming (Figure 16)

The vast majority (95%) of parents believed that parents have some responsibility to ensure children do not see unsuitable programming. This was made up of 40% who believed it was mainly the parent's role and 55% who saw it as an equal responsibility with broadcasters. Only 4% in 2010 said that it was mainly the broadcasters' responsibility.

Figure A1.16: Opinion on whose responsibility it is to ensure children do not see unsuitable programming
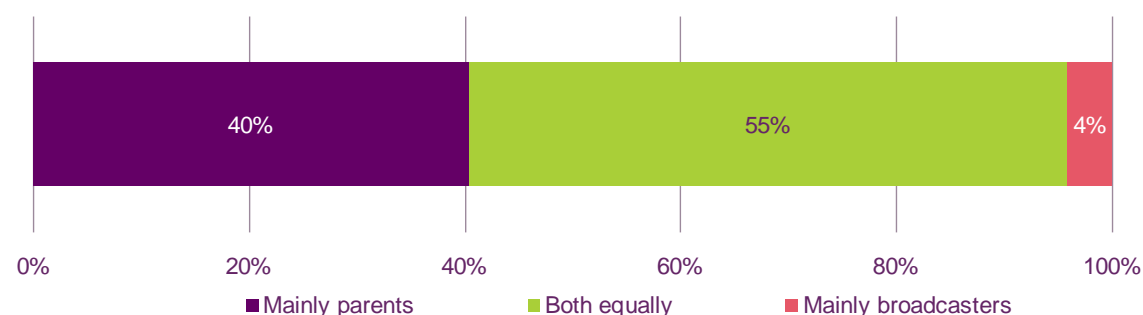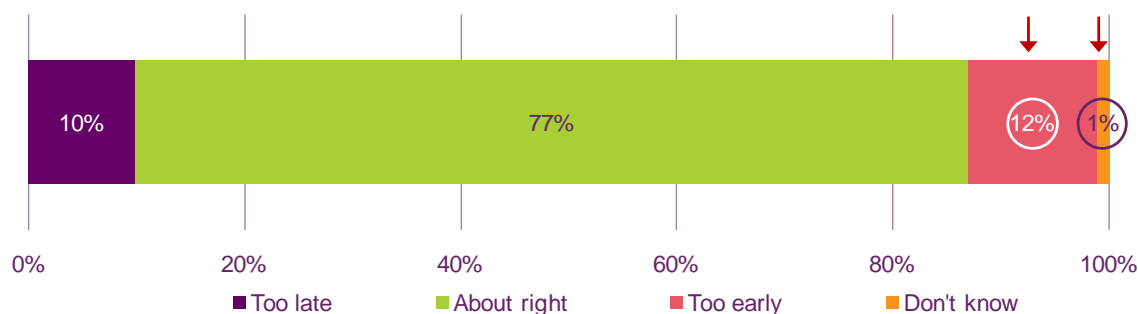

Source: Ofcom Media Tracker 2010.

Q - Do you think it is mainly the responsibility of parents, broadcasters or both equally, to make sure that children don't see unsuitable programmes? Base: Parents with TV and children in the household (649). Note: there are no significant differences to non-parents.

Over three-quarters (77%) of parents believed the 9pm watershed is at about the right time (Figure 17)

After being told that the UK watershed was set at 9pm, three-quarters (77%) of respondents answered they felt this was about right. The number of parents who believed the watershed was too early (12%) was significantly lower among non-parents (16%).

Figure A1.17: Opinions on current time of watershed
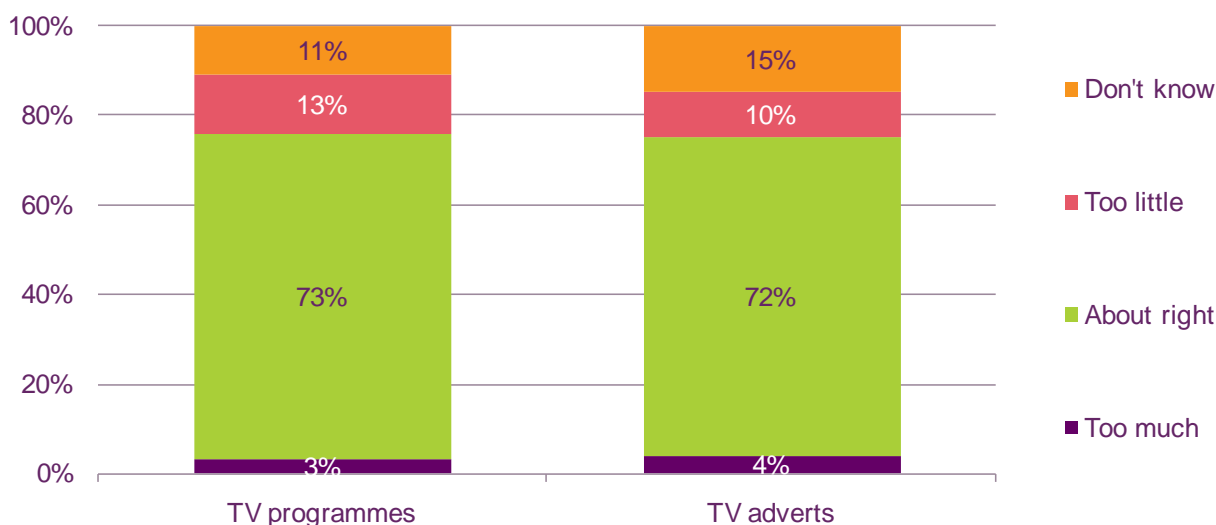

Source: Ofcom Media Tracker 2010.
Intro to question: On TV channels the time after which these programmes unsuitable for children may be shown is 9pm. Q - Do you think this is....?
Base: Parents with children in household (649). Significant differences to non-parents circled.

The vast majority of parents (87%) believe that TV programmes are regulated (Figure 18)

When respondents were asked if they thought TV programmes were regulated, 87% of parents thought they were. For adverts, this figure fell to 67%. These are similar to awareness figures measured across the total adult sample (85% thought TV programmes were regulated, 67% of all adults thought TV adverts were regulated). Following this question, all respondents were asked for their opinion on the amount of regulation in each area. The majority of parents considered the current level of television programme and advert regulation to be about right, at 73% and 72% respectively in 2010 (Figure 18).

Figure A1.18: Opinions on current levels of television regulation

Source: Ofcom Media Tracker 2010. Q - Do you think the amount of regulation for [television] is: i) Too much? ii) Too little? iii) About the right amount? Base: Parents with children in household (649). Note: there are no significant differences to non-parents.

Opinions on offensive material

Soaps and drama were the most likely programme types to cause offence[99] (Figure 19)

Nearly one in five (19%) parents said they had seen offensive material on television in the past 12 months. The most common was sexual content, with 8% of parents stating that they had been offended by sexual content in the past year. Offensive language (7%) and violence (7%) were the second and third most common causes. Nakedness (4%) was more likely to feature as a cause of offence among parents, compared to 2% of non-parents. Offensive language was a less common response from parents, at 7%, compared to the 10% of non-parents who gave it as a cause of offence.

In terms of the programme genres generating offence, among parents soaps were the most common, at 7%; in the non-parents sample 4% cited soaps. Other programme types included drama (6%), reality and films (both with 4%).

Figure A1.19: Type of material which caused offence
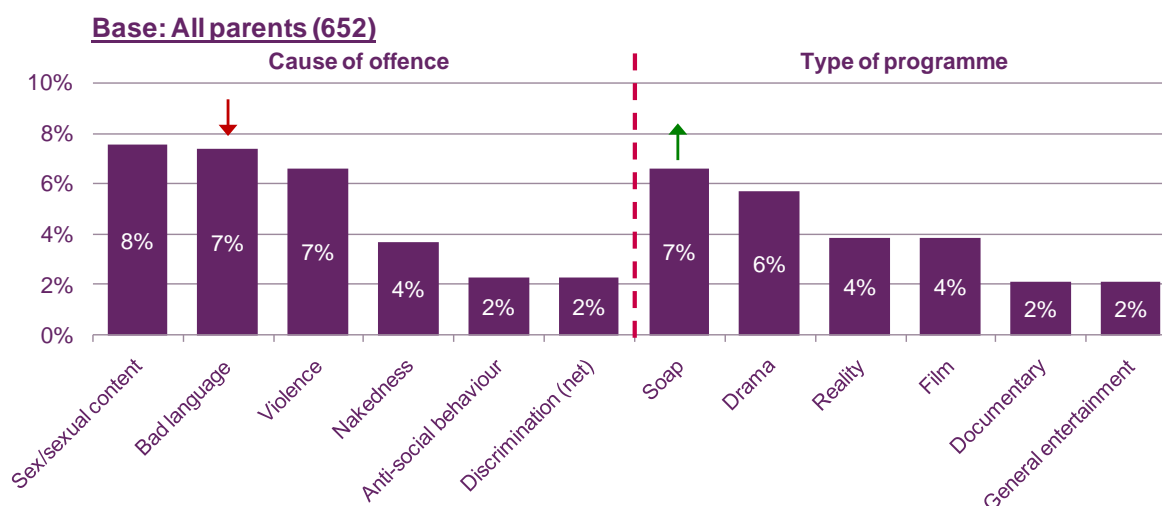
Source: Ofcom Media Tracker 2010.

Q - What kind of thing offended you? And Q - Can you say what type of programme it was, looking at this list? Base: All parents (652). Cause was multicode, unprompted. Top reasons and programme types charted. Significant differences to non-parents circled.

Parents were more likely to be comfortable with sexually explicit channels being available in the adult section of the EPG (Figure 20)

Levels of agreement and disagreement with several statements relating to potentially offensive material are shown in Figure 1.17. For sexually explicit programmes, over half (52%) of all parents felt that this content should be restricted to subscription channels. There was a significantly higher level of agreement among parents than among non-parents (64% agreement compared to 58%) that sexually explicit channels in the 'adult' section of the electronic programme guide (EPG) did not cause concerns, as it was possible to block them.

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[99] This question did not include music channels in the list of programme genres.

Parents were more likely to disagree that sexually explicit programmes should be freely available on any channel after the 9pm watershed, at 59%. This compares with 53% of non-parents and 55% across the whole sample.

On violent content, 48% felt this should be restricted to subscription channels. Over half (52%) disagreed that violent films should be freely available on any channel after the 9pm watershed.

Figure A1.20: Opinion on statements relating to potentially offensive material

	Agree	Neither agree nor disagree	Disagree	Not stated/ No opinion
Sexually explicit programmes should never been shown on TV	22%↓	22%	52%	3%
If people want to watch sexually explicit programmes they should be allowed to but only on subscription channels	55%	17%	25%	3%
Sexually explicit channels in the 'adult' section of the electronic programme guide (EPG) don't bother me. I can block them if I want	64%↑	18%	11%	7%
Sexually explicit programmes should be freely available on any channel after 9PM	22%	17%	59%↑	2%↓
If people want to watch particularly violent programmes they should be allowed to but only on subscription channels	48%	18%	30%	4%
Particularly violent films should be freely available on any channel after 9PM	29%	16%	52%	3%

Source: Ofcom Media Tracker 2010.

Q - I am going to read out some statements and I would like you to tell me how much you agree or disagree with them. Base: Parents with TV and children in household (649). Significant differences to non-parents circled.

Opinions on harmful content

Violence was the most commonly identified type of harmful content (Figure 21)

Over four-fifths (81%) of parents said they had not viewed any content they considered to be harmful over the past 12 months. In total, 16% had seen content they considered to be harmful. Parents were more likely to have seen what they considered to be harmful television content for children (14% of parents compared to 9% of non-parents).

Of those who said they had seen harmful content, violence was the most common kind, mentioned by 9% of all parents. Anti-social behaviour came second, with 4% having seen it, (significantly lower than non-parents). Alcohol and substance abuse followed, with 3%. Portrayal of self-harm (2%) and cult/ paranormal (1%) also were significantly more common among parents than among non-parents. Of the many responses citing 'other' types of harmful content (6%), issues relating to sexual content accounted for a third, representing 2% of all parents.

Figure A1.21: Respondents seeing what they consider to be harmful content

What was harmful?	%	
Violence	9%	
Antisocial behaviour	(4%)	↓
Alcohol/substance abuse	3%	
Portrayal of self harm	(2%)	↑
Portrayal of suicide	1%	
Cult/paranormal	(1%)	↑
Other	6%	
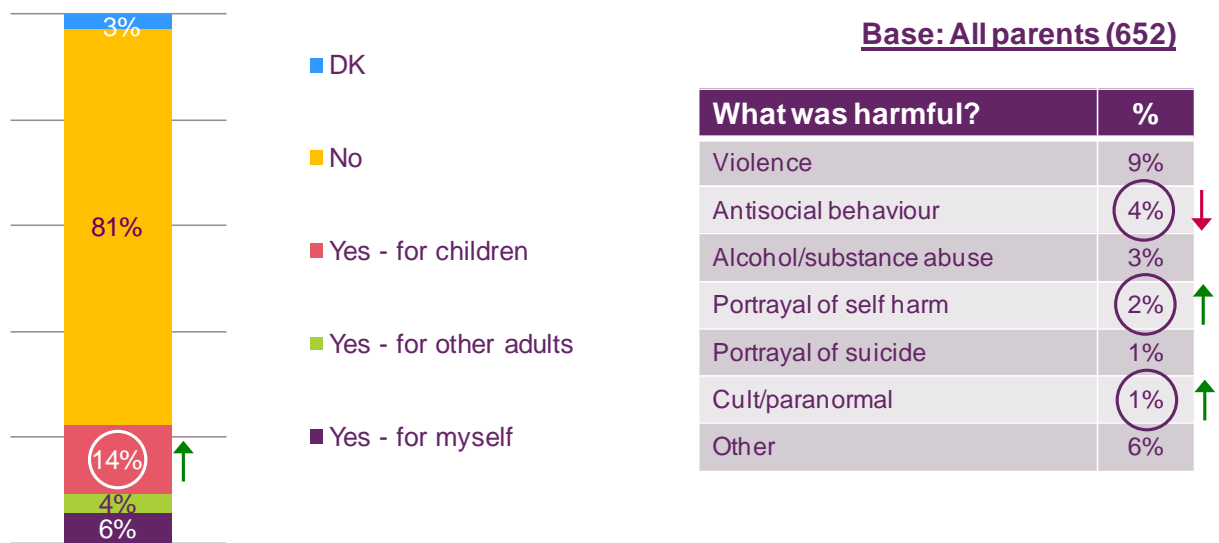
Source: Ofcom Media Tracker 2010.

Q - Have you seen anything on TV in the past 12 months that you thought was harmful either to yourself, other adults or children? Multicode, unprompted. Base: All parents (652). Significant differences to non-parents circled.

Children's TV viewing: BARB analysis

Note: On 1 January 2010 the new BARB measurement panel of 5,100 homes went live. Any comparison of trend data using both the old and new panels should therefore be made with caution.

2.1 Overall viewing trends

TV viewing has increased

Children's viewing has remained fairly stable across the period from 2005-2009, with an increase in 2010. In terms of overall reach (1 minute) the proportion of children watching at least 1 minute of television has remained stable during this period. This indicates that the universe hasn't grown, and therefore that the increase in viewing is attributable to the same size universe watching more.

In 2010 children aged 4-15 watched an average of **17 hours and 34 minutes** of television per week , up from **15 hours and 45 minutes** in 2005.

The vast majority of time spent viewing is to **live** broadcasts (87% among all children 4-15) and this proportion has not changed significantly since 2007. Older children (10-15) time-shift a slightly higher proportion of their viewing (15%) compared to younger children aged 4-9 (11%).

Platform ownership is a factor in time-shifted viewing

Children with access to Sky+ time-shifted a much greater proportion of their viewing (14%) compared to those children with access to other DVRs (i.e. Freeview DVRs or Virgins DVR) at 10%.

Daypart also makes a difference in relation to time-shifted viewing

 A greater proportion of viewing is time-shifted post 18:00. Post 21:00 a fifth (20%) of all viewing amongst 4-15 year olds is time-shifted.

Drama, films and documentaries are the most popular genres to be time-shifted.

When are children viewing

The distribution of viewing throughout the day has remained fairly unchanged over time, with the child profile peaking in the audience in the early morning and late afternoon. In terms of actual numbers of children viewing, the largest numbers are found peaking between 20:00-20:30. However, at this time children comprise only a small proportion of the total viewing audience, somewhere between 9-10%.

In terms of **post 21:00 viewing** and looking specifically at viewing between 21:00-24:00 there has been an **increase in the proportion of children** (based on the total child universe) watching television during this time band. In 2007 this figure was 12% of the total child universe, in 2010 it had increased to 14%. Amongst 4-9 year olds the figure went from 8% in 2007 to 10% in 2010 and amongst the 10-15 age group it increased from 15% to 18% across the same period.

Where is viewing taking place

Whilst it is still the case that the majority of viewing is taking place on what is defined as the 'main set' (which is not in the child's bedroom), the proportion of viewing attributed to the television set in the child's bedroom has increased from around 3% of total viewing amongst all children in 2007 to 5% in 2010, with this figure increasing to 8% amongst older children in 2010 from 5% in 2007.

The proportion of viewing attributed to the set in the child's bedroom varies by daypart – with an **increasing proportion attributed post 21:00** - 10% of total viewing post 21:00 is to the bedroom set amongst all children (double the whole day proportion) and amongst 10-15 year olds this increases to 13%.

What types of programming are children watching

Overall **72% of children's viewing is spent in commercial airtime** (both children's and adults). While this proportion hasn't changed considerably over the last five years, there has been a change in the split between terrestrial and non terrestrial commercial airtime[100]. There has been a growth in the proportion of viewing attributed to commercial non terrestrial airtime from 42% in 2005 to 52% in 2010 and a gradual decrease attributed to terrestrial commercial channels 29% in 2005 to 20% in 2010.

68% of total viewing takes place in 'adult' airtime[101] and this has remained fairly stable since 2005, however this figure varies significantly amongst different sub-groups, increasing to 80% amongst 10-15 year olds and 73% amongst children in DTT only homes. **32% of viewing takes place in 'children's' airtime** with the majority (21%) attributed to commercial children's airtime and 11% attributed to non commercial children's airtime.

Drilling down into viewing to children's airtime, the proportion attributed to commercial children's airtime has decreased from 70% in 2009 to 65% in 2010. The vast majority of viewing to commercial children's airtime is attributed to commercial non terrestrial children's channels. **The main area of growth in children's viewing has been to the BBC non terrestrial channels - from 18% in 2005 to 30% in 2010 (25% in 2009).**

Who children are watching with

Amongst all children **almost a fifth (19%) are watching television between 21:00-22:00 alone.** Amongst the younger age group (4-9) this figure is 7%; amongst the older group (10-15) it remains about a fifth.

Viewing to terrestrial channels is more likely to be supervised than viewing to non terrestrial channels. While this may feel surprising, further investigation reveals that a significant proportion of total viewing to non terrestrial channels is to dedicated children's channels and therefore less likely to be supervised (46% - so 54% is to 'adult airtime'). Whereas 92% of total viewing to terrestrial channels is to 'adult airtime' and therefore more likely to be watched with an adult present.

More generally across almost the entire day supervised viewing decreases with age. The oldest children and those in DTT-only homes appear to be supervised the least.

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[100] Terrestrial commercial airtime is defined as ITV1, Channel 4 and Channel 5 and non terrestrial commercial airtime is defined as all the multichannel channels excluding the BBC channels.
[101] This consists of all the main terrestrial channels (BBC1, BBC2, ITV1, Channel 4 and Channel 5) excluding the slots when children's programmes are shown, combined with all digital channels except for the dedicated children's channels.

Figure A2.1: Average hours of weekly viewing, by age

Average weekly viewing (Hrs, Mins)
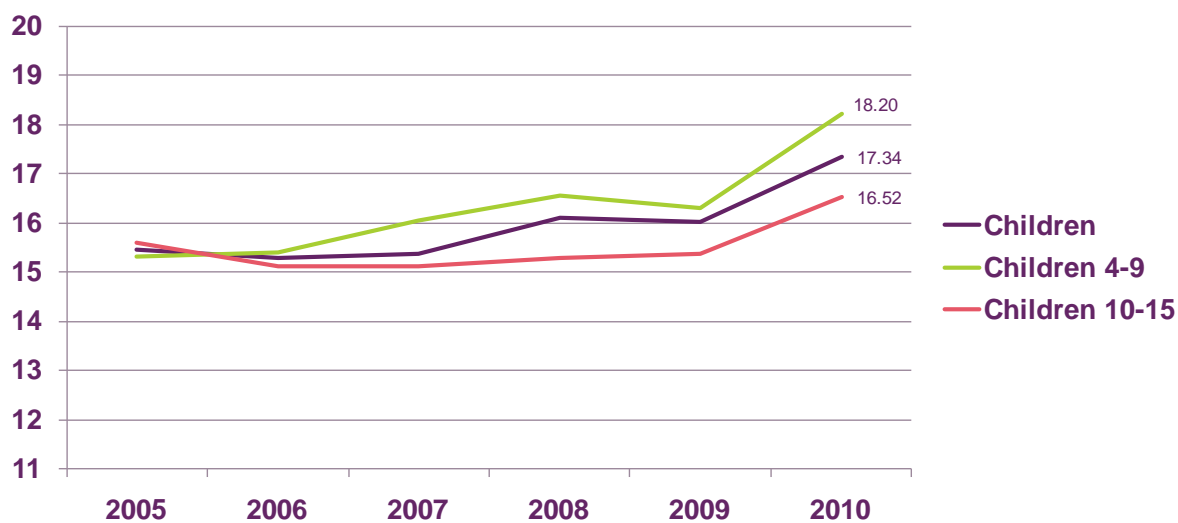
Source: BARB

Figure A2.2: Live versus time-shifted TV viewing, all children (4-15)

Proportion of viewing (%)

Source: BARB

Figure A2.3: Live versus time-shifted TV viewing, all children (4-9)

Proportion of viewing (%)

Source: BARB

Figure A2.4 : Live versus time-shifted TV viewing, all children (10-15)

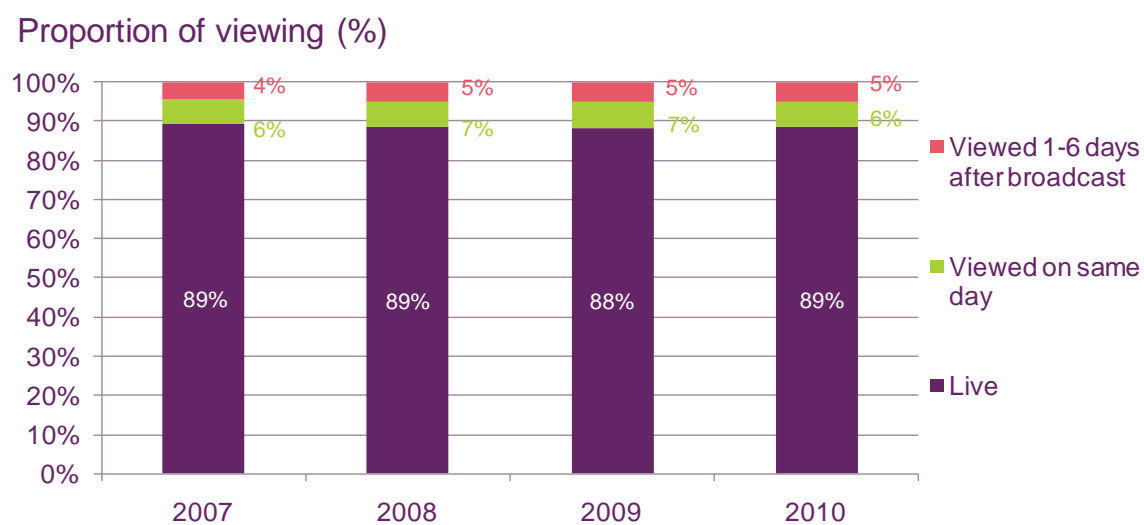Proportion of viewing (%)
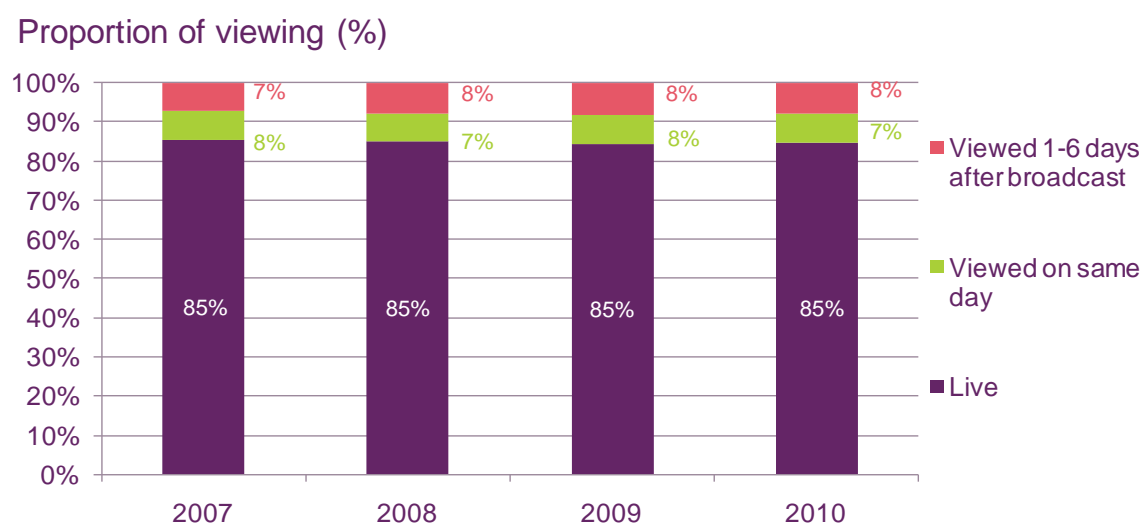
Source: BARB

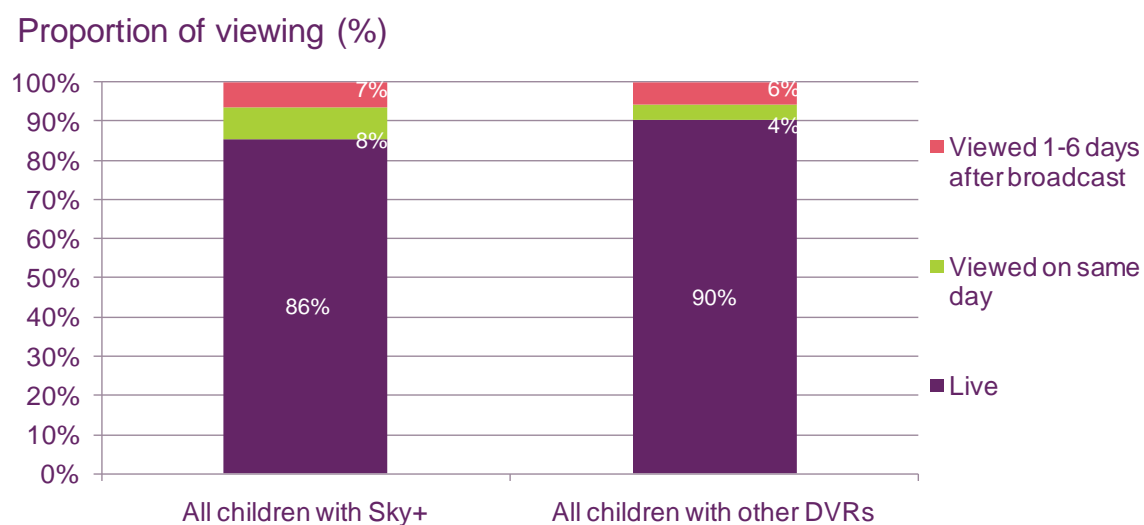**Figure A2.5 : Live versus time-shifted TV viewing, by type of DVR**

Proportion of viewing (%)

Source: BARB

Figure A2.6 : Proportion of Live vs. time-shifted viewing by channel
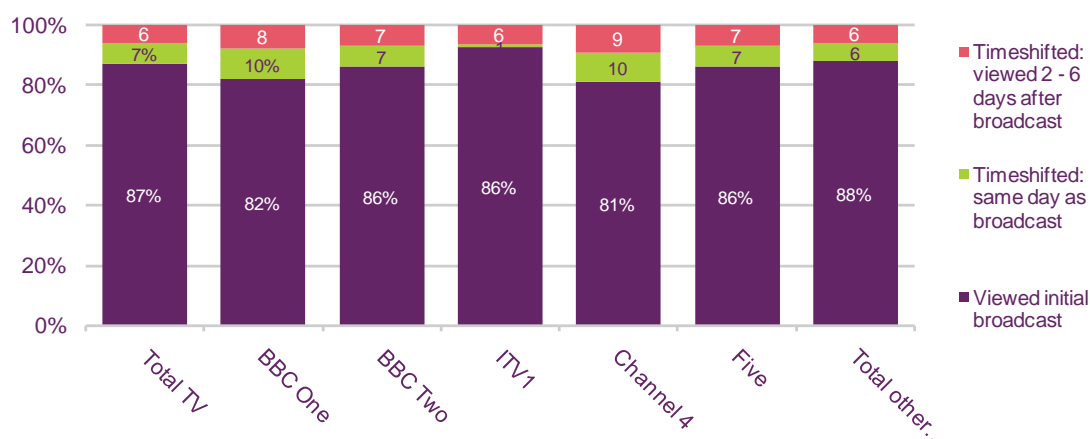
Source: BARB 2010, all children with DVRs

Figure A2.7 : Proportion of Live vs. time-shifted viewing by channel

Legend:
- Timeshifted: viewed 2 - 6 days after broadcast
- Timeshifted: same day as broadcast
- Viewed initial broadcast

Channel	Viewed initial broadcast	Timeshifted: same day	Timeshifted: 2-6 days
Total TV	89%	6%	5%
BBC One	87%	9%	9%
BBC Two	88%	6%	6%
ITV1	87%	9%	4%
Channel 4	78%	11%	11%
Five	89%	6%	5%
Total other..	89%	6%	4%
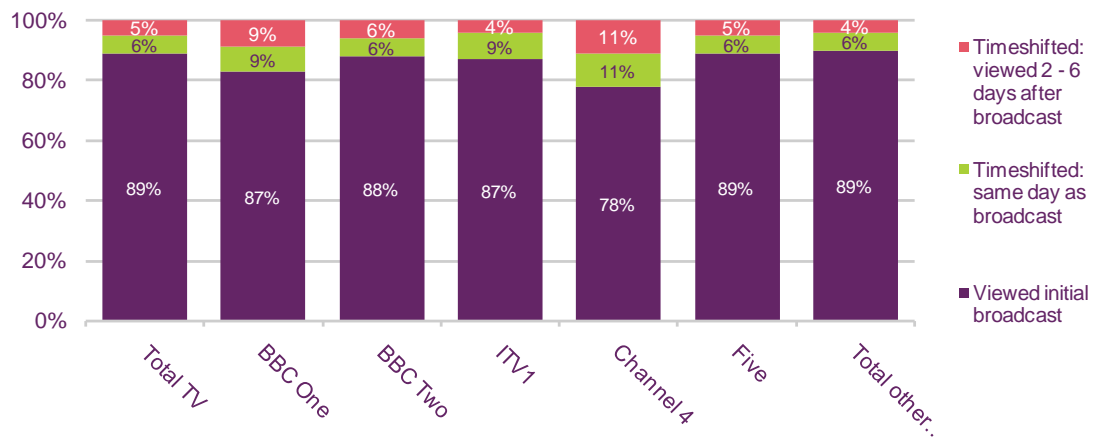
Source: BARB 2010, all children 4-9 with DVRs

Figure A2.8 : Proportion of Live vs. time-shifted viewing by channel

Legend:
- Timeshifted: viewed 2 - 6 days after broadcast
- Timeshifted: same day as broadcast
- Viewed initial broadcast

Channel	Viewed initial broadcast	Timeshifted: same day	Timeshifted: 2-6 days
Total TV	85%	7%	8%
BBC One	80%	11%	9%
BBC Two	85%	7%	9%
ITV1	84%	10%	6%
Channel 4	81%	8%	11%
Five	81%	10%	9%
Total other..	87%	6%	7%
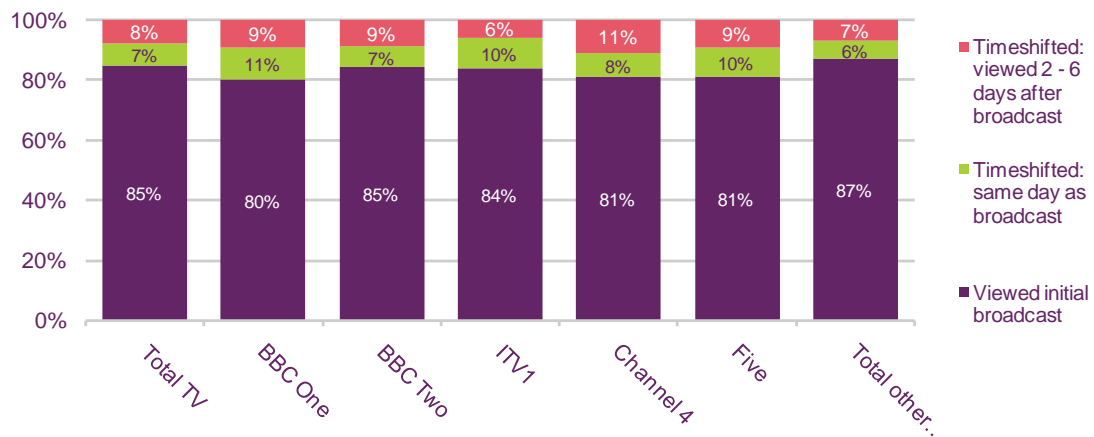
Source: BARB 2010, all children 10-15 with DVRs

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Figure A2.9 : Proportion of time-shifted viewing by daypart

Source: BARB 2010

Figure A2.10 : Proportion of time-shifted viewing by genre – all children (4-15)
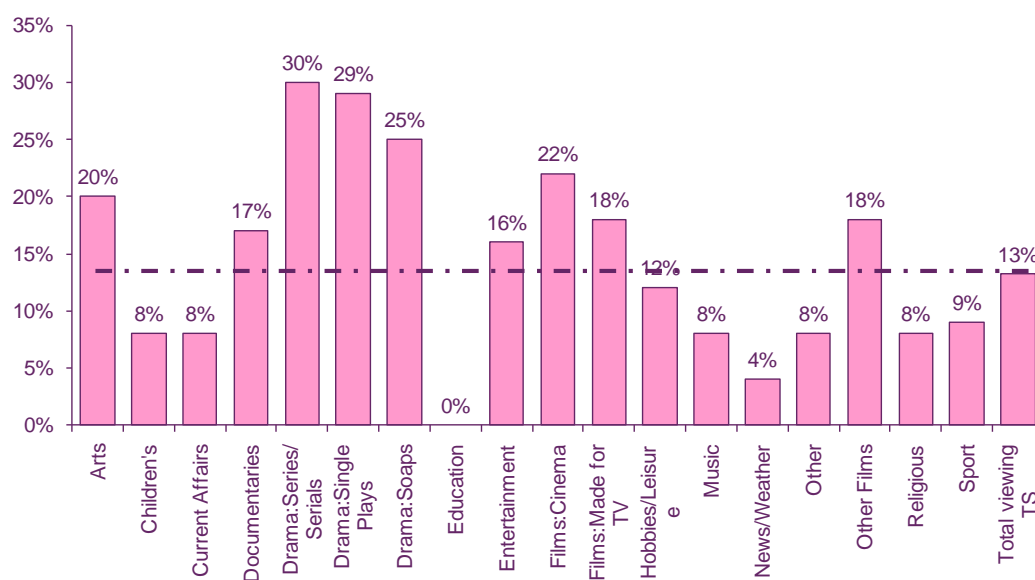
Source: BARB 2010

Figure A2.11 : Daypart profile by hour vs. average audience - all children (4-15)
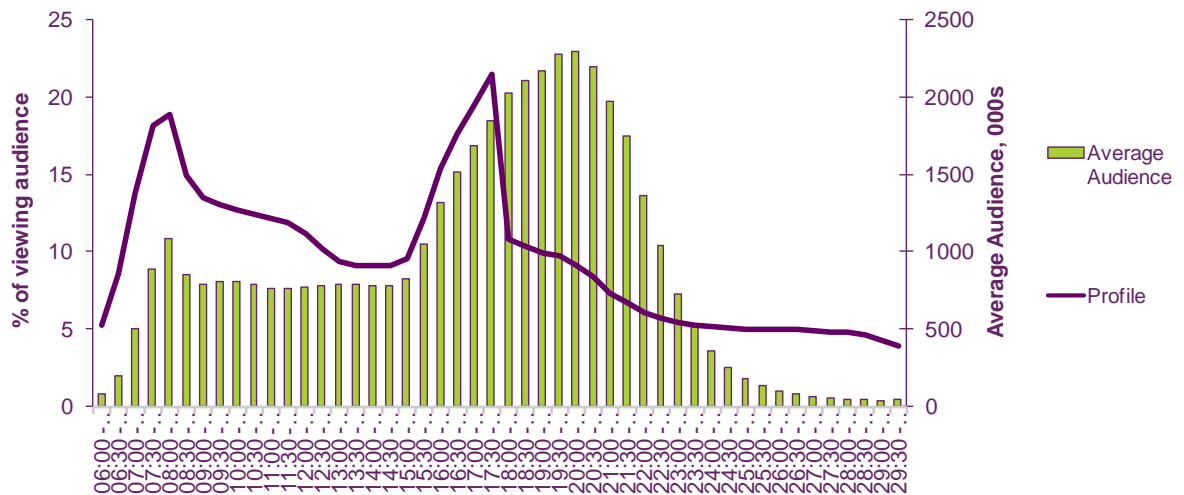
Source: BARB, 2010. TOTAL TV VIEWING. Profile data calculated on a base of all Individuals

Figure A2.12 : Daypart profile by hour vs. average audience - children (4-9)
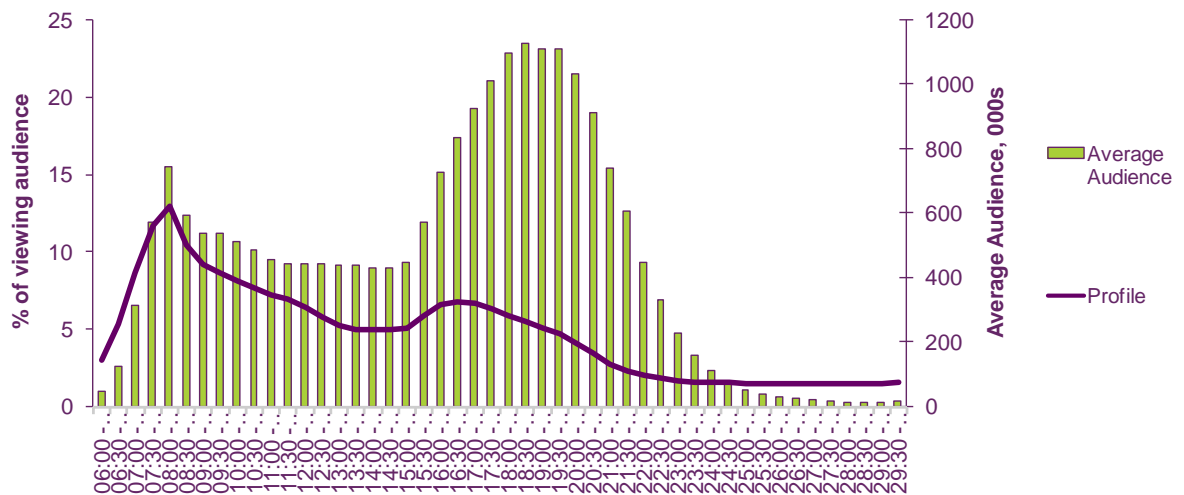
Source: BARB, 2010. TOTAL TV VIEWING. Profile data calculated on a base of all Individuals

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Figure A2.13 : Daypart profile by hour vs. average audience - children (10-15)
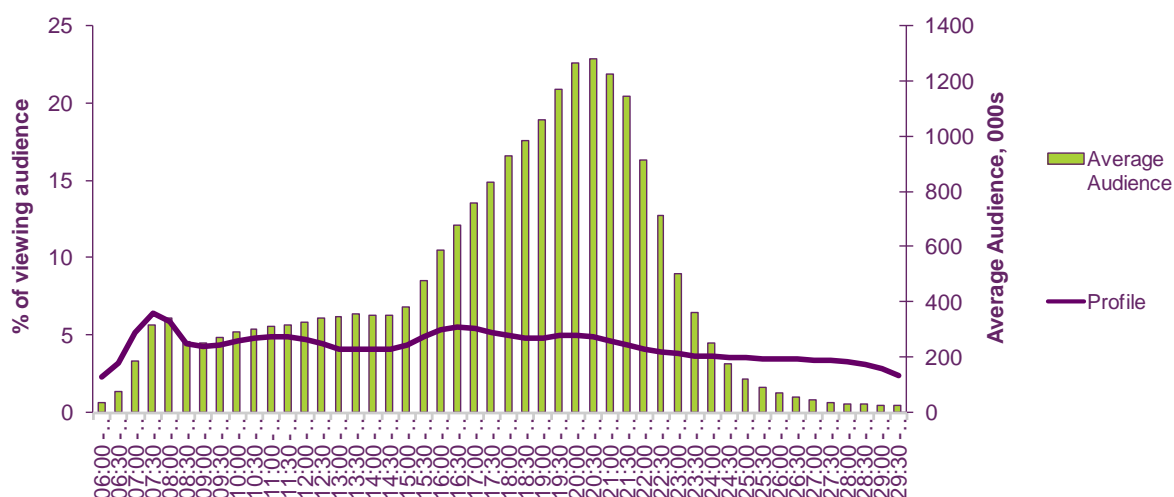
Source: BARB, 2010. TOTAL TV VIEWING. Profile data calculated on a base of all Individuals

Figure A2.14 : Viewing by set location – proportion of total daily time spent viewing – all children
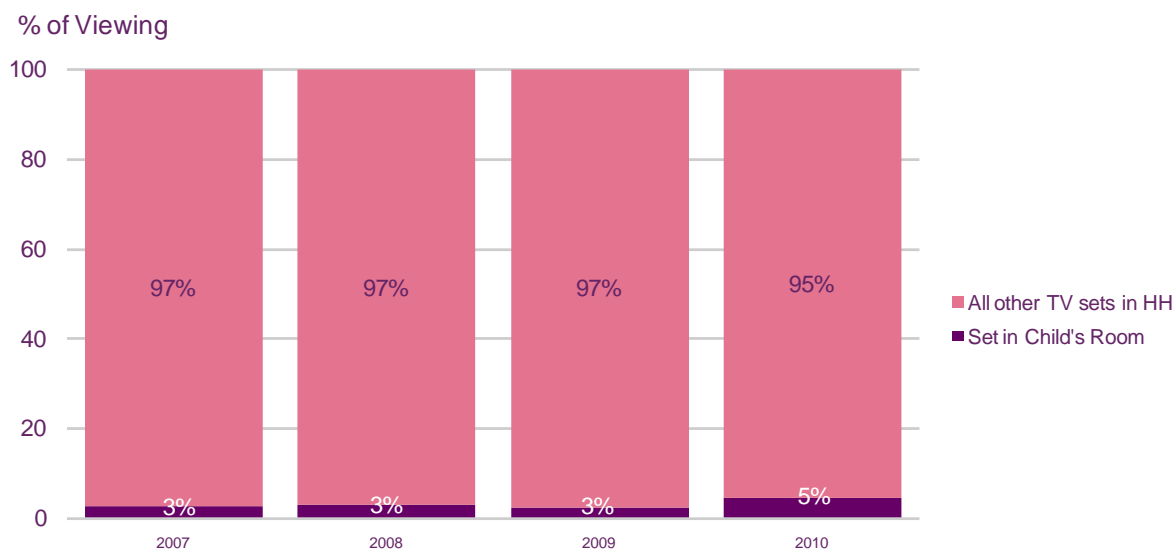
Source: BARB 2010, all children 4-15

Figure A2.15 : Viewing by set location – proportion of total daily time spent viewing
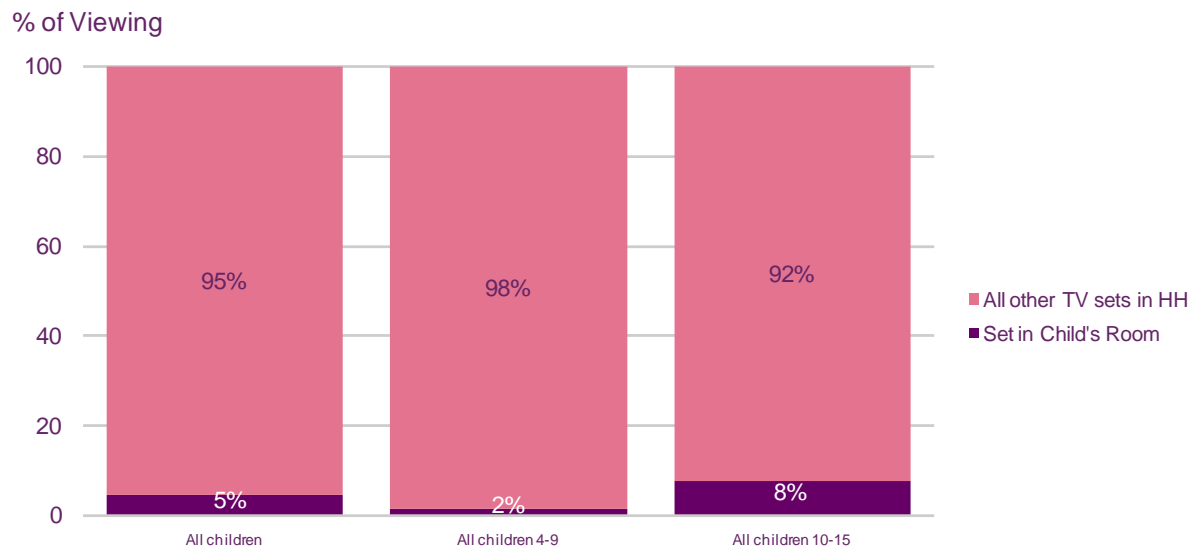
% of Viewing

Source: BARB 2010

Figure A2.16 : Viewing by set location – total daily time spent viewing
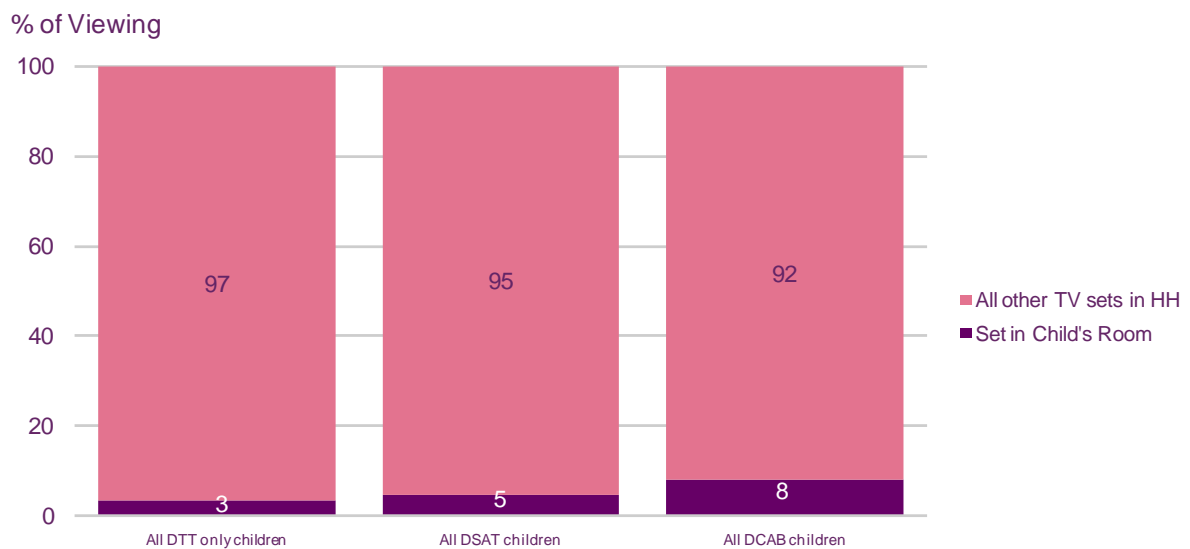
% of Viewing

Source: BARB 2010

Figure A2.17 : Proportion of total viewing in child's bedroom by daypart
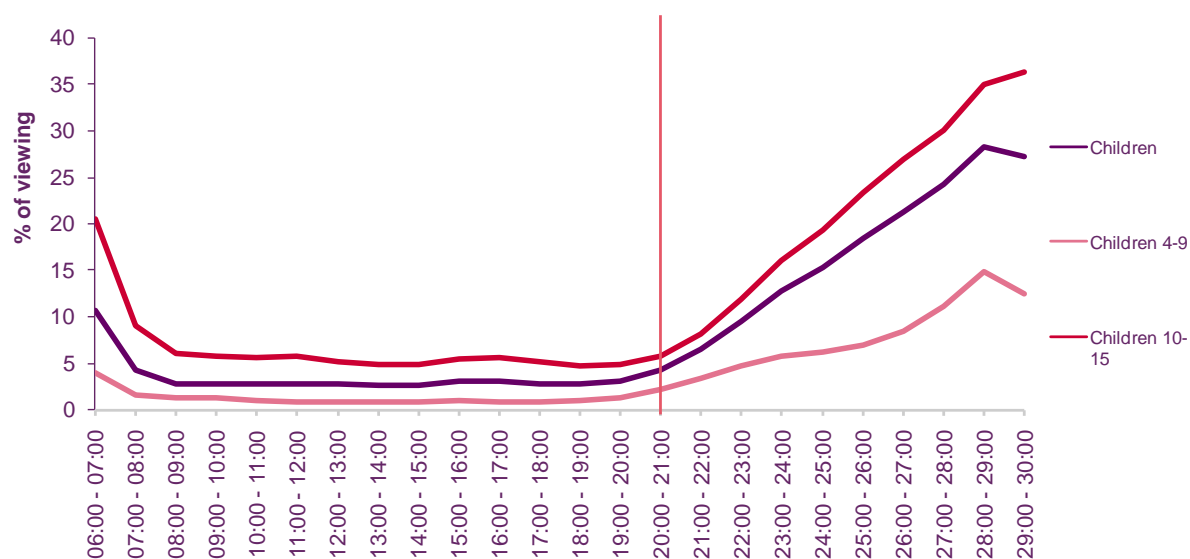
Source: BARB 2010

Figure A2.18 : Top 10 programmes in 2010 amongst all children 4-15

Title	Channel	Date	Start time	End time	Duration	000s
THE X FACTOR RESULTS	ITV1 (SD+HD)	12/12/2010	19:29:00	21:30:56	02:01:56	2287
THE X FACTOR	ITV1 (SD+HD)	11/12/2010	18:59:00	21:00:51	02:01:51	2232
EASTENDERS	BBC1 (SD+HD)	19/02/2010	20:00:00	20:32:43	00:32:43	2008
DOCTOR WHO	BBC1 (SD+HD)	25/12/2010	18:00:56	19:02:39	01:01:43	1971
I'M A CELEBRITY - GET ME OUT OF HERE!	ITV1 (SD+HD)	04/12/2010	21:24:15	22:23:37	00:59:22	1937
BRITAIN'S GOT TALENT	ITV1 (SD+HD)	05/06/2010	19:29:00	21:58:55	02:29:55	1903
WORLD CUP 2010: ENG V GER	BBC1 (SD+HD)	27/06/2010	14:52:11	16:49:04	01:56:53	1685
WORLD CUP 2010: LIVE	ITV1 (SD+HD)	18/06/2010	18:29:00	21:47:05	03:18:05	1651
CORONATION STREET	ITV1 (SD+HD)	09/12/2010	20:00:05	20:59:28	00:59:23	1350
BRITAIN'S GOT TALENT RESULT	ITV1 (SD+HD)	03/06/2010	21:30:20	21:57:25	00:27:05	1300

Source: BARB

Figure A2.19 : Children's total weekly viewing, by channel type

Proportion of weekly viewing (%)

Total average weekly hours of viewing by child

- Commercial multichannel (e.g. Sky One, Jetix, Disney, CiTV)
- BBC digital (e.g. CBBC, CBeebies, BBC Three)
- ITV1, Channel 4, Five
- BBC One, BBC Two
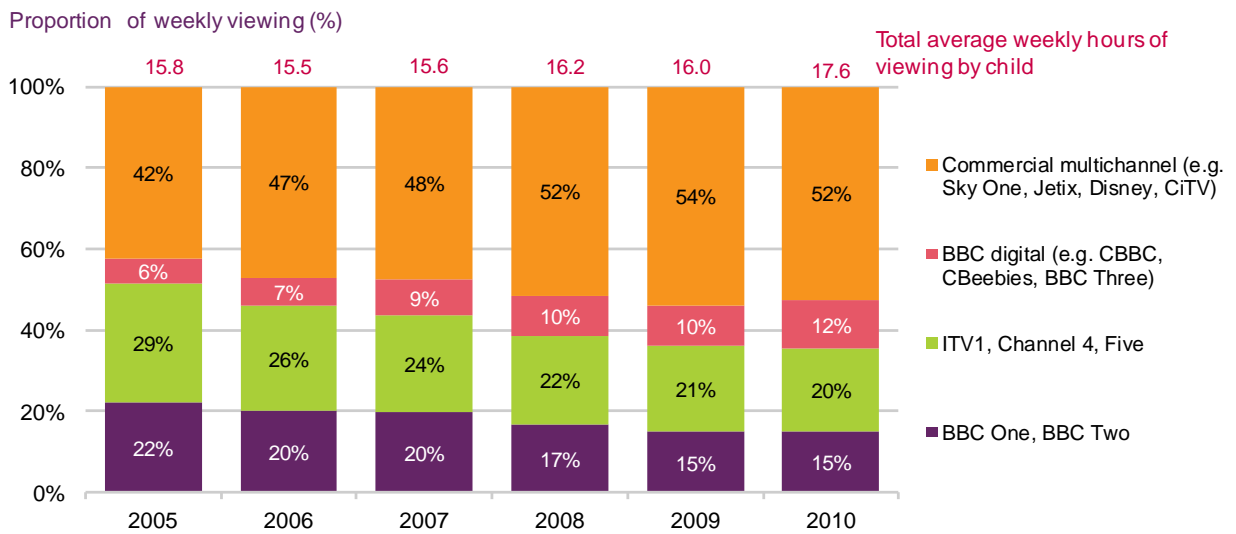
Source: BARB 2005-2010, all children 4-15

Figure A2.20 : Children's weekly viewing of children's airtime, by channel type

Proportion of weekly viewing (%)

Total average weekly hours of viewing by child

- Commercial multichannel (e.g. Boomerang, Disney, CiTV)
- BBC digital (e.g. CBBC, CBeebies)
- ITV1, Channel 4, Five
- BBC One, BBC Two
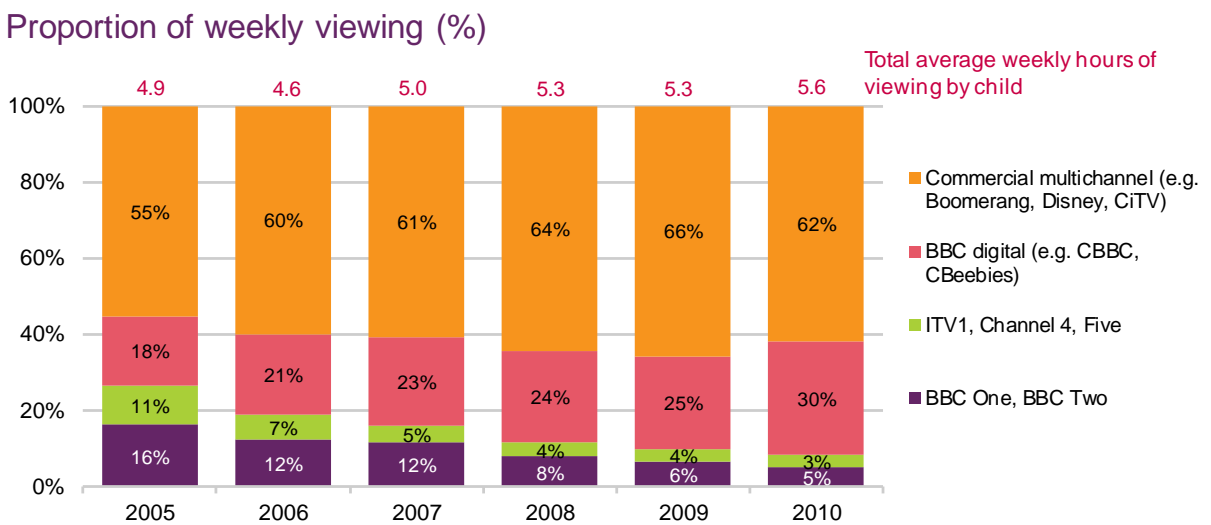
Source: BARB 2005-2010, all children 4-15

Figure A2.21 : Demographic Differences

Weekly Viewing Summary	Children	4-9	10-15	DTT only kids	DSAT kids	DCAB kids
Total hours of viewing	17.6	18.3	16.9	17.2	17.6	18.0
Total hours of viewing in comm. airtime	12.8	13.0	12.5	10.0	14.0	13.6
Total hours of viewing in adult airtime	11.9	10.3	13.5	12.5	11.6	12.1
Total hours of viewing in comm. adult airtime	9.1	7.8	10.3	8.9	9.1	9.3
Total hours of viewing in children's airtime	5.6	8.0	3.4	4.7	6.1	5.9
Total hours of viewing in comm. children's air.	3.7	5.2	2.2	1.2	4.8	4.3
% total time spent in commercial airtime	72.6%	70.8%	74.3%	58.5%	79.1%	75.8%
% total time spent in adult airtime	68.0%	56.2%	80.1%	72.9%	65.6%	67.1%
% total time spent in comm. adult air.	**51.7%**	**42.6%**	**61.0%**	**51.8%**	**51.6%**	**51.7%**
% total time spent in children's airtime	32.0%	43.8%	19.9%	27.1%	34.4%	32.9%
% total time spent in comm. children's airtime.	**20.9%**	**28.3%**	**13.3%**	**6.7%**	**27.4%**	**24.1%**

Source: BARB

Figure A2.22 : Mutual viewing by channel groups

Network, 2010 – All children and adults
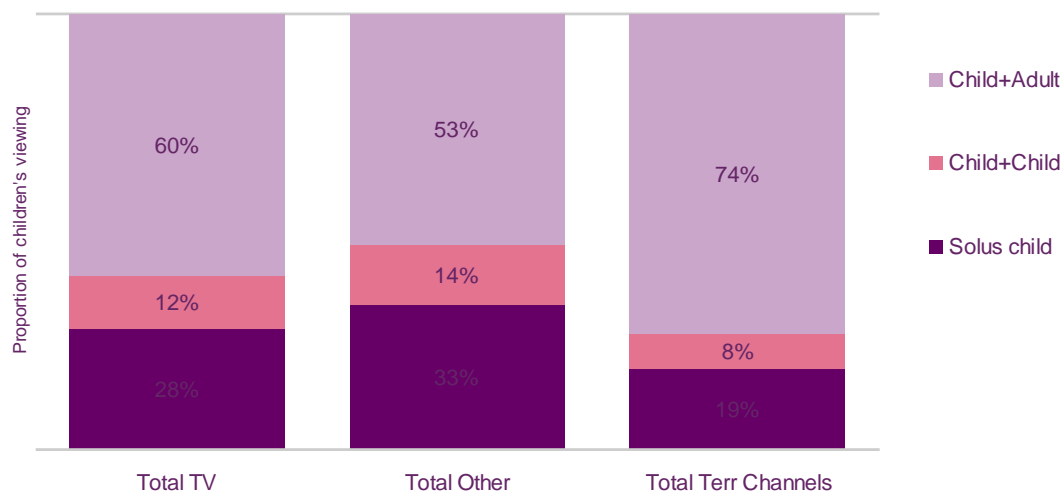
Source: BARB 2010, all children 4-15

Figure A2.23 : Mutual viewing across the day – all TV viewing

Network, 2010 – Total TV – All children and adults
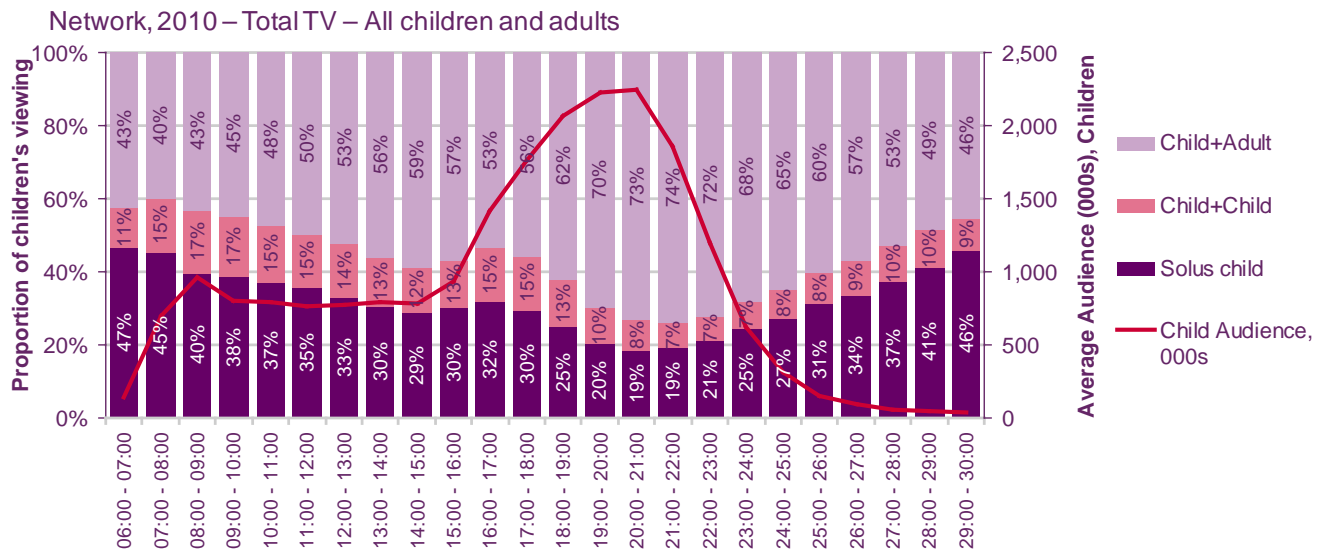
Source: BARB 2010, all children 4-15

Figure A2.24 : Mutual viewing across the day – terrestrial channels

Network, 2010 – Terrestrial channels – All children and adults
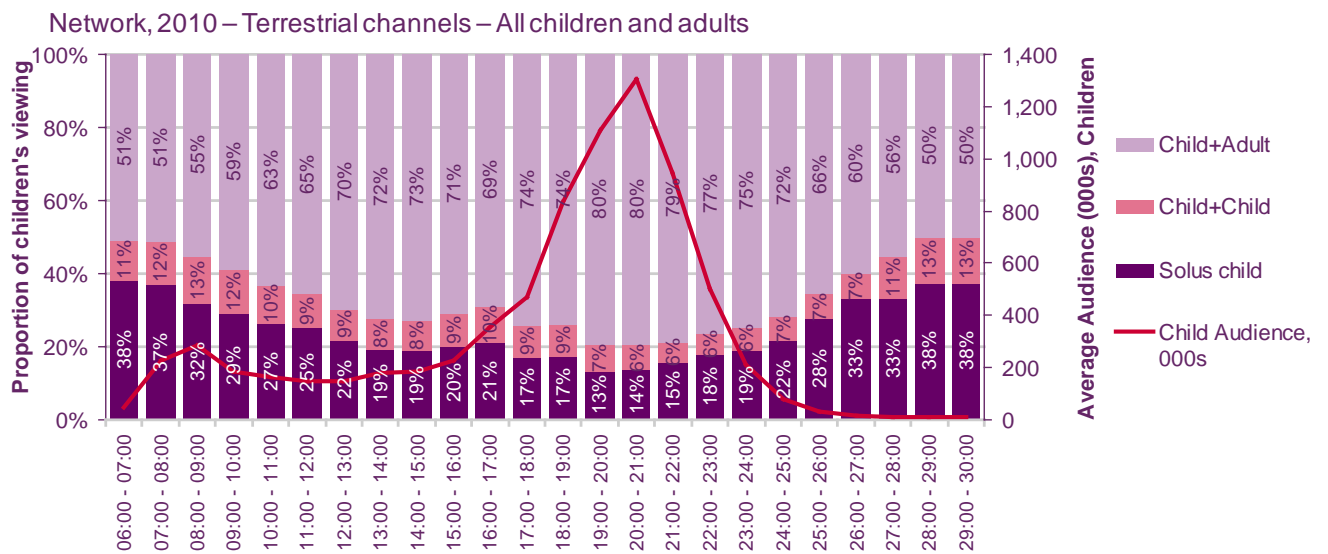
Source: BARB 2010, all children 4-15

Figure A2.25 : Mutual viewing across the day – non-terrestrial channels

Network, 2010 Non-terrestrial channels – All children and adults
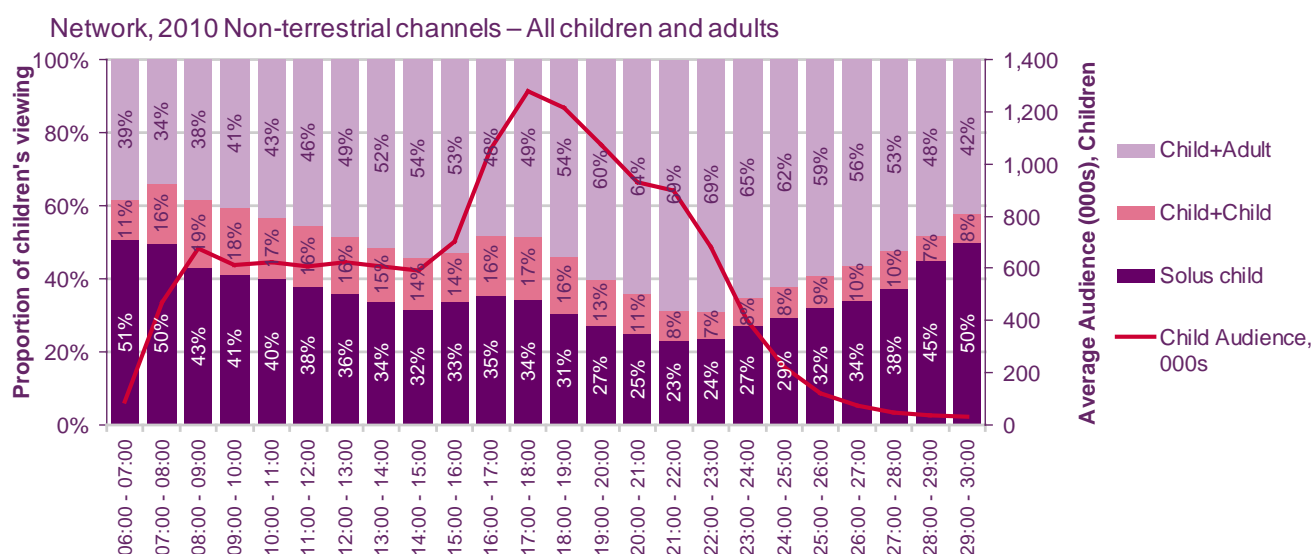
Source: BARB 2010, all children 4-15

Figure A2.26 : Children viewing with adult only supervision
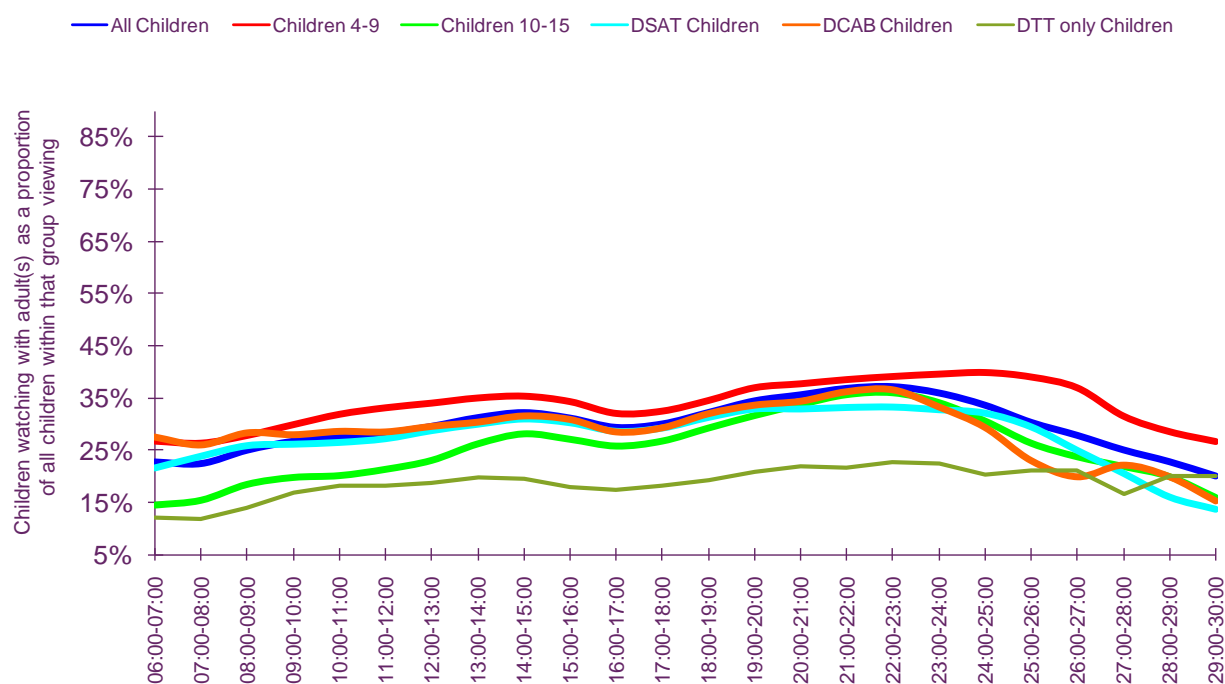
Source: BARB 2010, Total TV, calculation based on demo universe

2.2   Glossary

Adult airtime – This consists of all the main terrestrial channels excluding the slots when children's programmes are shown, combined with all digital channels except for the dedicated children's channels.

Children's airtime - This consists of the children's programme slots on the main terrestrial channels and the dedicated children's channels on the digital platform

DVRs – digital video recorders

Time-shifted viewing – This is defined as viewing to programmes within seven days, as well as viewing after pausing or rewinding live TV. Viewing outside of the seven day window is not accounted for.

Websites visited by children

3.1   Introduction

This annex provides tables of the types of website visited by children aged 5-7, 8-11 and 12-15 from monitored PC/laptop computers at home during March 2011, as measured by UKOM/Nielsen.

It offers useful context to our main report, showing the specific web entities that children visit, and how this differs according to the age of the child.

3.2   Methodology

Internet usage data is sourced from UKOM/Nielsen. UKOM (**http://www.ukom.uk.net**) is a cross-industry organisation which selected Nielsen to supply the data for its industry-approved planning system for online media. The data are derived from Nielsen's UK panel of households, comprising 45,239 individuals (aged 2+), as of March 2011, weighted to be representative of the UK's home internet population. Internet activity is recorded by tracking software downloaded with permission onto all panel members' computers within the household.

The tables provide information based on unique audience website visits and coverage percentage data. Unique audience is defined by UKOM/Nielsen as the total number of unique persons that have visited a website at least once in the given month. Adults visiting the same website more than once in the month are therefore counted only once. Coverage is defined by UKOM/Nielsen as the percentage of unique persons falling within a specific demographic target that visited a particular website.

The following tables display the highest 50 web entities in terms of unique audience for 8-11s and 12-15s. In the case of children aged 5-7, 25 web entities with a coverage of more than 10% are listed.

Internet applications (installed software used in conjunction with the internet,such as Instant Messenger or Media Player) are included in the tables. Websites are included at both 'brand' and 'channel' level. These are terms used by UKOM/Nielsen to group websites by their distinguishing properties in order to aid site classification. Table 1 sets out the definitions supplied by UKOM/Nielsen.

Table A3.1: Definition of 'brand', 'channel' and 'internet application'

Brand

A Brand may be a branded subsidiary or a brand of a Property that has a consistent collection of branded content of the Internet. The Brand's individual identity must be conveyed consistently or prominently throughout the Brand as well as all Channels and domains, which are in its consolidation.

A Brand may consist of Channels, domains and URLs.

- Consistent and prominently displayed Brand identity and must have an obvious or apparent editorial consistency and an appropriate name or label.
- The Brand classification is flat and does not detail the hierarchal relationship between other Brands.
- A Brand will be placed into a Category and Subcategory for comparison.
- A Brand may be a subsidiary or operating unit if it is cohesively branded
- A network Property or network subsidiary (an operating unit composed of unrelated domains under one umbrella, i.e. Everyone.net) will contain the unrelated domains at the Brand level.

Channel

A Channel is the lowest level of the hierarchical structure for Web properties. Channels can be loosely defined as destinations on the web where editorial consistency is focused on specific viewer interest such as auctions or weather. The Channels will be named according to user experience and content type.

- Each Channel must have an obvious or apparent editorial consistency and an appropriate name or label.
- A Channel is a mutually exclusive subset of audience interest within an owner's total offering. An overriding principle of content classification will cause the elimination of audience double counting.
- All Channels will be assigned to a "Category" and "Sub-category" in our category reports as defined by Nielsen with guidance from representatives of the Subsidiary or the Property when appropriate.

Internet Application

An Internet Application is any computer file ending in .exe that is primarily marketed for use in conjunction with the Internet. Only "in focus" applications are counted towards reported unique audience and associated metrics. For example, if a media player launches upon system start-up, but only sits in the task bar it is not considered an active use of the application. Once a user opens any application into an "active" or in-focus window, that user is counted toward unique audience and associated metrics. Internet Application categories include the following: Instant Messengers, Media Players, Media Sharing, ISP Applications (non-browsing), Wireless content systems, Web Phones, News & Information toolbars (ESPN Bottom Line), Connected Games, Proprietary AOL, Weather, Auction Assistants, and Shopping Assistants.

Although the tracking meter tracks all types of applications, many are not considered to be "Internet" applications. These include basic software such as word processing, database, project management, spreadsheet, etc., installer programs, operating systems or other system's software (e.g. printing, cookie washers, FTP, etc.), adult and flash applications, software that exclusively sends or blocks advertising, and most games. Because the meter only tracks applications launched with an executable program ending in

" .exe" plug-ins are not tracked, and are not included in the definition of Digital Media (e.g., Google Toolbar, Yahoo Companion, embedded media players, etc.).

Source: UKOM/Nielsen

For more information on the data methodology and measurement contained in this annex, please visit http://www.nielsen.com/uk

Table A3.2: March 2011, Web entities accessed by children aged 5-7

No.	Web Entity	Level	Unique Audience (000s)	Coverage (%)
1	Google	Brand	465	71.72
2	Google Search	Channel	440	67.79
3	BBC	Brand	359	55.38
4	MSN/WindowsLive/Bing	Brand	285	43.9
5	Facebook	Brand	260	40.06
6	BBC CBeebies	Channel	197	30.31
7	YouTube	Brand	179	27.61
8	Yahoo!	Brand	170	26.19
9	eBay	Brand	139	21.42
10	Disney Online	Brand	132	20.31
11	Windows Live Messenger	Channel	118	18.14
12	Google Image Search	Channel	114	17.59
13	Amazon	Brand	110	16.88
14	Windows Live Hotmail	Channel	107	16.55
15	Microsoft	Brand	105	16.18
16	Google Maps	Channel	97	14.99
17	Apple	Brand	89	13.71
18	Ask Search Network	Brand	88	13.52
19	Wikipedia	Brand	84	12.94
20	YouTube Homepage	Channel	81	12.43
21	Club Penguin	Channel	79	12.23
22	Bing Web	Channel	77	11.92
23	Windows Media Player	Channel	73	11.29
24	MSN Homepage	Channel	72	11.04
25	Yahoo! Mail	Channel	65	10.1

Source: UKOM/Nielsen: UK Home panel, March 2011, ages 5-7, including Internet Applications
Only web entities with a coverage > 10% are listed.

Table A3.3: March 2011, Top 50 web entities accessed by children aged 8-11

No.	Web Entity	Level	Unique Audience (000s)	Coverage (%)
1	Google	Brand	901	81.79
2	Google Search	Channel	864	78.49
3	MSN/WindowsLive/Bing	Brand	620	56.28
4	Facebook	Brand	582	52.83
5	BBC	Brand	505	45.85
6	YouTube	Brand	473	42.97
7	Google Image Search	Channel	453	41.15
8	Yahoo!	Brand	403	36.6
9	Windows Live Messenger	Channel	345	31.31
10	YouTube Homepage	Channel	331	30.02
11	Microsoft	Brand	288	26.13
12	Wikipedia	Brand	274	24.92
13	eBay	Brand	271	24.57
14	Windows Live Hotmail	Channel	263	23.91
15	Amazon	Brand	257	23.35
16	Ask Search Network	Brand	235	21.38
17	Apple	Brand	228	20.73
18	Google Maps	Channel	220	20.02
19	Windows Media Player	Channel	212	19.22
20	Disney Online	Brand	184	16.69
21	Bing Web	Channel	174	15.83
22	Blogger	Brand	170	15.41
23	iTunes	Channel	169	15.37
24	BBC CBBC	Channel	163	14.76
25	Yahoo! Mail	Channel	160	14.49
26	SPIL Games Network	Brand	159	14.4
27	MSN Homepage	Channel	157	14.23
28	WikiAnswers	Brand	155	14.04
29	AOL Media Network	Brand	154	14.01
30	Club Penguin	Channel	153	13.87
31	Ask.com	Channel	142	12.94
32	Moshi Monsters	Brand	141	12.81
33	Yahoo! Answers	Channel	132	12.01
34	BBC iPlayer	Channel	122	11.1
35	VEVO on YouTube	Channel	118	10.75
36	VEVO	Brand	118	10.75
37	BBC News	Channel	118	10.67
38	Google Account	Channel	116	10.51
39	iGoogle	Channel	114	10.34
40	Zynga	Brand	109	9.94
41	Apple Product Info & Support	Channel	108	9.8
42	Yahoo! Search	Channel	106	9.62
43	BBC Learning 5-19	Channel	105	9.56
44	Glam Media	Brand	104	9.46
45	MiniClip	Brand	99	8.97
46	Sky Portal	Brand	98	8.93
47	Skype	Brand	98	8.88
48	Skype Messenger	Channel	97	8.82
49	GirlsGoGames.com	Channel	96	8.75
50	Gorilla Nation Websites	Brand	89	8.05

Source: UKOM/Nielsen: UK Home panel. March 2011. Ages 8-11 years, including Internet Applications.

Table A3.4: March 2011, Top 50 web entities accessed by children aged 12-15

No.	Web Entity	Level	Unique Audience (000s)	Coverage (%)
1	Google	Brand	1,589	80.94
2	Google Search	Channel	1,523	77.57
3	Facebook	Brand	1,359	69.21
4	MSN/WindowsLive/Bing	Brand	1,217	61.97
5	YouTube	Brand	1,026	52.26
6	Google Image Search	Channel	872	44.41
7	YouTube Homepage	Channel	866	44.13
8	Windows Live Messenger	Channel	801	40.81
9	BBC	Brand	733	37.34
10	Yahoo!	Brand	705	35.91
11	Wikipedia	Brand	552	28.1
12	Windows Live Hotmail	Channel	530	26.99
13	Google Maps	Channel	499	25.44
14	Microsoft	Brand	497	25.33
15	eBay	Brand	494	25.18
16	Apple	Brand	477	24.32
17	VEVO	Brand	408	20.76
18	VEVO on YouTube	Channel	407	20.75
19	iTunes	Channel	392	19.96
20	Windows Media Player	Channel	373	18.98
21	MSN Homepage	Channel	360	18.32
22	Ask Search Network	Brand	356	18.15
23	Amazon	Brand	354	18.03
24	Bing Web	Channel	324	16.49
25	Blogger	Brand	300	15.26
26	AOL Media Network	Brand	298	15.15
27	Yahoo! Answers	Channel	277	14.09
28	WikiAnswers	Brand	269	13.73
29	Yahoo! Mail	Channel	258	13.16
30	BBC iPlayer	Channel	238	12.13
31	Apple Product Info & Support	Channel	236	12.02
32	Glam Media	Brand	228	11.6
33	Groupon	Brand	227	11.56
34	Google Account	Channel	224	11.39
35	Zynga	Brand	221	11.24
36	MyMaths.co.uk	Brand	214	10.91
37	Ask.com	Channel	188	9.57
38	Machinima on YouTube	Channel	185	9.44
39	formspring.me	Brand	183	9.31
40	Virgin Media	Brand	178	9.09
41	BBC News	Channel	177	9
42	Sky Portal	Brand	176	8.98
43	Skype	Brand	176	8.96
44	Yahoo! Homepage	Channel	173	8.82
45	Yahoo! Search	Channel	171	8.7
46	About.com	Brand	161	8.21
47	Skype Messenger	Channel	158	8.04
48	Argos	Brand	151	7.69
49	Channel 4	Brand	146	7.46
50	Twitter.com	Brand	146	7.45

Source: UKOM/Nielsen: UK Home panel. March 2011. Ages 12-15 years, including Internet Applications.