



Adults' Media Use
and Attitudes Report
2014

Research Document

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1 Executive summary

Our *Adults' Media Use and Attitudes Report* provides detailed evidence on media use, attitudes and understanding among UK adults aged 16+. It covers TV, radio, mobile, games, and the internet, with a particular focus on the latter.

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.

Key themes from this year's report include:

- There has been growth in take-up and use by older people, across a range of devices
- There has been growth in a range of online activities, particularly across communication and entertainment activities
- User-generated content is an information source for users, although online users are more likely to receive than to contribute content
- Privacy and security attitudes and behaviour continue to vary considerably by age group
- Among those with app-enabled devices, apps are more popular than browsers for some online activities

More UK adults, especially older adults, are now going online, using a range of devices

Over eight in ten (83%) of adults now go online using any type of device in any location. Nearly all 16-24s and 25-34s are now online (98%), and there has been a nine percentage point increase in those aged 65+ ever going online (42% vs. 33% in 2012).

The number of adults using tablets to go online has almost doubled; from 16% in 2012 to 30% in 2013. While almost all age-groups are more likely than previously to use tablets in this way, use by those aged 35-64 has doubled, while use by 65-74s has trebled; from 5% to 17%.

Six in ten UK adults (62%) now use a smartphone, an increase from 54% in 2012. This increase is driven by 25-34s and 45-54s, and those aged 65-74 are almost twice as likely to use a smartphone now compared to 2012 (20% vs. 12%).

The range of mobile activities has increased, particularly among 25-34s and 45-54s

These increases in take-up of mobile devices mirror an increase in the range of mobile activities that people are doing, many of which are communication- and entertainment-based. Over half (55%) of mobile users ever send / receive emails on mobile, and use their mobile to visit social networking sites or apps. Four in ten mobile users have ever used mobile phones to put photos or videos on sites like YouTube, while the same number (38%) use their phone for instant messaging. Almost three in ten ever use services like Skype or FaceTime on mobile phones.

One third of mobile users now say they buy things via their phone (33% vs. 23% in 2012) or use their phone to check their bank balance (34% vs. 25% in 2012).

TV continues to be the most-missed media activity

Watching television remains the most-missed media activity among adults in 2013, (although, since 2009, this is missed by a minority: 42% of adults), followed by using a smartphone (22%) and going online via a PC/ laptop/ netbook (15%).

However, this varies considerably by age group, with only 13% of 16-24s nominating TV, compared to around one third of 25-44s, and nearly seven in ten of people aged 65+. The device that most 16-34s say they would most miss using is a smartphone (47% for 16-24s and 36% for 25-34s).

Just over half (54%) of online users say they watch TV programmes online, on any device; this has not increased since 2012. This rises to seven in ten 16-24s (71%). One in five (22%) of mobile phone users have ever watched a TV programme on a mobile phone, with one in eight (13%) doing so at least quarterly.

Gaming has grown in popularity, driven by older age-groups and mobile phones

Four in ten (42%) UK adults now play games on any device, compared to 35% in 2012. Playing games on a mobile has increased (19% vs. 13%), as has playing games on a tablet (10% vs. 5%). In both cases, these increases are driven by 25-34s (13pp for mobiles and 9pp for tablets), those aged 45-54 (9pp and 7pp) and those aged 55-64s (5pp and 4pp).

Compared to 2012, those aged 45-54 are twice as likely to play games over the internet (18% vs. 9%). Playing games on a mobile phone (either games loaded on the phone or those that require you to go online) has also increased by seven percentage points for internet users (46% vs. 39% in 2012). This increase is most notable for those aged 16-24 (82% vs. 71% in 2012) and 45-54s (42% vs. 31% in 2012).

A range of social networking sites are being used, although Facebook remains the default service

Two-thirds (66%) of online adults say they have a current social networking site profile, unchanged since 2012 (64%). Nearly all with a current profile (96%) have one on Facebook, although the incidence of having only a Facebook profile has fallen to 43% in 2013 compared to 53% in 2012. Three in ten social networkers say they have a Twitter profile, and one in five say they have a YouTube (22%) or WhatsApp profile (20%). Social networking overall remains a popular pastime, with 60% of users visiting sites more than once a day, an increase from 50% in 2012, and with 83% of 16-24s doing so (69% in 2012).

Twitter users are the most likely to say they follow friends (72%) and then celebrities (45%) and news (also 45%), followed by hobbies and interests (33%). On average, Twitter users say they follow 146 people or organisations, and have 97 followers.

Government processes are carried out online by six in ten online users

Six in ten online users (61%) say they complete government processes online, which is unchanged since 2012. One in eight (13%) say they contact their local councillor or MP online, which is also unchanged since 2012. But there has been a decrease in the frequency of completing government processes online at least quarterly from 33% in 2012 to 28% in 2013.

However, since 2012 there has been a rise in the numbers of people saying they prefer to use email or websites to complete government processes, out of a range of possible types of communication – from 43% in 2012 to 48% in 2013. Those that complete government services online say that it's convenient (84%) and quicker than doing it in person (40%).

User-generated content (UGC) is an information source for online users, although people are more likely to be users than contributors

Ninety-eight per cent of online adults say they use search engines, 59% say they use YouTube for information, and half (51%) use Wikipedia or online recommendations from friends. Four in ten (44%) use user reviews and 38% use closed Facebook groups. Young people aged 16-24 are more likely to use YouTube (75%) and closed Facebook groups (55%) than are all online adults.

Among internet users, search engines are the most important information source (93%), followed by online recommendations (39%) and user reviews (36%). Personal user reviews are rated as more important than reviews by critics or journalists in the wider media (25%).

However, among those who use online review sites, far fewer write reviews than read them. Fifty-six per cent of people who buy things online say they often read user reviews compared to one in ten (11%) who often write them.

Apps are more popular than browsers for various activities

Just under half of mobile phone users (48%) say they download apps on their mobile phone (up from 37% in 2012). Smartphone users have an average of 23 apps on their phones, of which they say they use ten regularly.

There is a clear preference for using apps rather than browsers for gaming and for downloading videos and music, and half of app users who look at news said they prefer to use an app (50% vs. 36% who prefer a browser). However, app users prefer to use browsers for shopping online and for looking for information (50% and 62% respectively).

Two in ten app users have concerns about apps, compared to half (51%) of internet users who have concerns about content on the internet, and just over a third (36%) of TV viewers who have concerns about content on TV.

Attitudes to being online vary by age and online experience

Experiences and attitudes towards being online vary by age group. Younger users are likely to take a more liberal approach to regulation and moderation, and employ a range of strategies to manage their online experience proactively, while older users appear to prefer a more moderated and regulated experience. Attitudes about the desirability of online protection have changed little over time, and a desire for online freedom exists alongside participants' interest in protection.

For example, 44% of internet users agree with the statement: "I should be free to say and do as I want online", while 82% agree that "internet users must be protected from inappropriate or offensive content", a figure which has barely changed since 2005.

Younger users are more likely to agree that they should be free to say what they like online (six in ten (59%) of 16-24s compared to 25% of those aged 65+), although there is no difference by age in terms of agreement about the need for protection.

Related to this, when asked: "Is the internet regulated in terms of what can be shown or written?" almost half (47%) of internet users said that it is regulated, with those aged 45-54 significantly more likely to say this (58%). One in four adults don't know if the internet is regulated, and those aged 16-24 are significantly more likely to say they don't know (35%).

With regard to protecting their identity and personal information online, younger users (aged 16-24) demonstrate a proactive approach to managing their social media experience. Compared to all users, they are more likely to have made their privacy settings on Facebook more private (76% vs. 65% for all users). Social networking site users aged 16-24 are also more likely than all users to block friends (49% vs. 36%) and delete photos that they have posted (32% vs. 22%).

Younger users (aged 16-24) seem aware of how to protect their identity in these ways, and are more likely to agree that they give out inaccurate or false information online to protect their personal identity (34% vs. 26% for all internet users). However, they are also more likely to say they are happy to provide personal information online to companies as long as they get what they want in return (55% versus 42% for all internet users), suggesting some inconsistency in their approach to managing personal information.

Age and gender influence security and safety behaviours and experiences

Differences by age group and gender suggest that depth and breadth of internet use, as well as experience and attitude to risk, may influence people's online safety and security behaviour.

Those aged 65+ are less likely than all internet users to use some online, and most mobile, security features; however, they are also less likely to report having negative online experiences.

In contrast, 79% of those aged 16-24s who go online through a PC/ laptop or netbook use anti-virus software, but are more likely than all adults to say they have experienced a computer virus in the past 12 months (28% vs. 20%). Similarly, almost half of 16-24s use email filters, and again, are more likely than all adults to experience emails being sent without their consent (17% vs. 11%).

Non-users

Compared to 2012, there are fewer non-users of the internet now, with 12% saying that they don't have access to the internet at home and don't intend to get the internet at home in the next 12 months. In 2012 the proportion was 15%.

While one in ten of those aged 16-44 do not have access at home, around one in three intend to get it in the next 12 months. In contrast, almost all of those aged 55+ who don't have access to the internet at home (20% for 55-64s, 37% for 65-74s and 65% for over-75s) do not intend to get it in the next 12 months (15%, 30% and 59% respectively).

In 2013 over a quarter of non-users made proxy use of the internet. This represents a nine percentage point increase: to 27% from 18% in 2012.

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2 Introduction

2.1 Ofcom's duties

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 promote opportunities to participate; to protect consumers from harm, and to contribute and implement public policy as defined by Parliament.

2.2 What is media literacy?

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".

In a largely unregulated online world, it is arguably more important than ever for people to develop the core media literacy skills: *use, understand and create*, as well as a range of additional skills specifically related to digital consumption; for example, developing the critical evaluation skills to make informed choices about content, and developing strategies for the management of personal information.

Ofcom's media literacy research adds flesh to the bones of pure consumption and behaviour metrics, looking at attitudes and motivations and how they all fit together, with an underlying emphasis on how this impacts upon society in general rather than on consumers in particular.

2.3 The focus of this report

This report is designed to give an accessible overview of media literacy among adults aged 16 and over, and is based on two main surveys – the adults' media literacy tracker and the adult internet users' survey. Where possible, within the overall sample of adults, demographic analysis is conducted by age, 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, and mobile phones; and
- to identify emerging issues and skills gaps that help to target stakeholders' resources for the promotion of media literacy.

This year we have changed the format of the report to enable improved navigation to key areas of interest. We have shortened the report itself, and grouped findings in it by theme to allow for greater contextual understanding. As a companion to the report, we provide a comprehensive chart pack of findings, that can be found at www.ofcom.org.uk/medialiteracyresearch.

2.4 Research methodology and analysis

This report draws on research from the 2013 media literacy tracker, with adults aged 16 and over, and the 2013 adult internet users' survey. Where possible, comparisons are made between this research and the reports listed below. These reports and their related datasets can be found at www.ofcom.org.uk/medialiteracyresearch.

Media Literacy Tracker with adults: 2013

A quantitative survey comprising 1,642 in-home interviews with adults aged 16 and over, with interviews conducted from October to November 2013.

Adult internet user survey: 2013

A quantitative survey comprising 1,032 in-home interviews with adult internet users aged 16 and over, with interviews conducted from October to November 2013.

Media Literacy Tracker with adults: 2012

A quantitative survey comprising 1,805 in-home interviews with adults aged 16 and over, with interviews conducted from September to November 2012.

Media Literacy Tracker with adults: 2011

A quantitative survey comprising 1,823 in-home interviews with adults aged 16 and over, with interviews conducted from September to October 2011.

Media Literacy Audit Tracker with adults: 2010

A quantitative survey comprising 2,117 in-home interviews with adults aged 16 and over, with 1,063 interviews conducted from April to May 2010 and 1,054 interviews conducted from September to October 2010.

Media Literacy Audit Tracker with adults: 2009

A quantitative survey comprising 1,824 in-home interviews with adults aged 16 and over, with 812 interviews conducted from April to May 2009 and 1,012 interviews conducted from September to October 2009. The report was published in 2010.

Media Literacy Audit survey: 2007

A quantitative survey comprising 2,905 in-home interviews with adults aged 16 and over from October to December 2007. The report was published in 2008.

Media Literacy Audit survey: 2005

A quantitative survey comprising 3,244 in-home interviews with adults aged 16 and over from June to August 2005. The report was published in 2006.

Where possible, we have included findings from 2005, 2007, 2009, 2010, 2011 and 2012. Some questions, however, have not featured in every year in which the research has been conducted. Comparisons are generally made between the 2013 and 2012 findings rather than the long-term trends.

Significance testing

Significance testing at the 95% confidence level was carried out, and any findings detailed in this report have been found to be significant to a 95% confidence level. This means that where findings are commented on, there is only a 5% or less probability that the difference between the samples is by chance.

Statistically significant findings between 2012 and 2013 are indicated in the figures in the report by circles or arrows. In addition to reporting on differences over time, we look at adults in the different age groups and socio-economic groups, and compare these to all adults interviewed in 2013, to see if there are any significant differences within these sub-groups. We also report on differences between men and women.

Take-up figures

The take-up figures in this report give useful information to contextualise people's media literacy-related behaviour and attitudes. Official all-UK Ofcom take-up figures, based on a larger survey, can be found in the annual CMR (*Communications Market Report*) published in the summer of each year¹.

Additional qualitative research

Ofcom has recently published two reports which provide useful qualitative context to many of the findings in this report.

The *Apps Environment Research Report* prepared for Ofcom by Kantar Media is a qualitative research study exploring the apps environment. The report investigated the attitudes and behaviours of app users, the stated and observed impact of apps on their lives, and any stated concerns among users.

Being online: an investigation of people's habits and attitudes is a qualitative research study carried out by Ipsos MORI for Ofcom, looking at how people use the internet and interact with online services.

¹www.ofcom.org.uk/cm13

3 Take-up and use

This section looks at adults' take-up and use of media. It outlines the access adults have to devices, and their personal preferences for particular media.

One of the core benefits of our media literacy tracker is its ability to show how different media compare to each other in levels of consumption and use over time. As such, this section documents which media are used regularly, the different devices used to go online, and the volume of internet use. It also looks at the devices used to play games and the volume of gaming, and finishes with a focus on which media adults say they would miss the most, and how this has changed over time.

A comprehensive chart pack of all the findings in this section, including by age and demography, can be found at www.ofcom.org.uk/medialiteracyresearch.

3.1 Section overview

- There have been some significant changes in 2013 in relation to internet-enabled technology and older age groups.
- In 2013, 83% of adults go online using any type of device in any location. This increase of four percentage points is a result of changes in three different age-groups: 25-34s (up 6pp), 45-54s (up 7pp), and most notably, an increase of nine percentage points among those aged 65+.
- There have also been significant increases in the use of mobile technology. In particular, the use of smartphones increased to 62% of all adults in 2013 compared to 54% in 2012. This is attributable to an increase for 25-34s (88% vs. 75%), for 45-54s (66% vs. 46%) and for those aged 65-74 (20% vs. 12%).
- Reflecting the pattern of overall use/ ownership, there has also been an increase, to six in ten adults (59% vs. 53% in 2012), using a mobile phone to go online. Again, this is driven by 25-34s (85% vs. 73% in 2012) and 45-54s (63% vs. 48%).
- A similar picture emerges for tablets; the number of adults using a tablet to go online almost doubled; to 30% in 2013 from 16% 2012. A key difference between smartphones and tablets is that growth in the use of tablets to go online is driven by significant increases across all ages, from 16 to 74, including a doubling of incidence among those aged 35-44, 45-54 and 55-64 and a trebling of incidence for those aged 65-74.
- In 2013 the number of adults who play games at home or elsewhere increased from 35% to 42% and was driven by a six percentage point increase in the use of mobiles for gaming and a five percentage point increase in the use of tablets for gaming.
- Media activities such as watching TV and listening to radio remain stable, although the marked differences by age continue to increase.

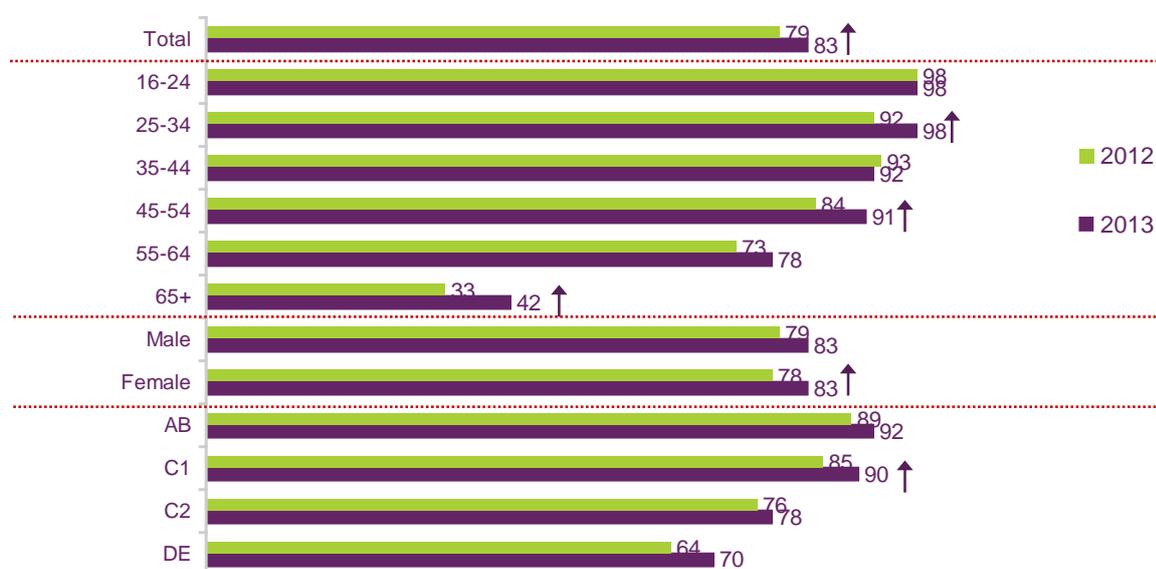
3.2 Internet

More people, especially older people, are going online

Over eight in ten adults now go online using any type of device in any location. This is an increase of four percentage points: from 79% in 2012 to 83% in 2013. As illustrated in Figure 1 below, internet use varies considerably by age. The increase in the number of adults going online in 2013 was driven by three different age groups: 25-34s (up 6pp), 45-54s (up 7pp), and most notably, by an increase of nine percentage points among those aged 65+.

Females are more likely to go online now than in 2012, with an increase of five percentage points (from 78% to 83% in 2013), as are those in C1 households (90% vs. 85% in 2012).

Figure 1: Use of the internet anywhere, by demographic group: 2012 and 2013



IN1/ IN3 – Do you or does anyone in your household have access to the internet at home through a computer, laptop or notebook? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all? (Prompted responses, single coded)

Base: All adults aged 16+ (1805 aged 16+, in 2012, 1642 aged 16+ in 2013, 234 aged 16-24 in 2012, 224 aged 16-24 in 2013, 236 aged 25-34 in 2012, 260 aged 25-34 in 2013, 300 aged 35-44 in 2012, 270 aged 35-44 in 2013, 234 aged 45-54 in 2012, 226 aged 45-54 in 2013, 262 aged 55-64 in 2012, 262 aged 55-64 in 2013, 539 aged 65+ in 2012, 400 aged 65+ in 2013, 893 male in 2012, 790 male in 2013, 912 female in 2012, 852 female in 2013, 409 AB in 2012, 368 AB in 2013, 536 C1 in 2012, 461 C1 in 2013, 356 C2 in 2012, 331 C2 in 2013, 504 DE in 2012, 482 DE in 2013). Significance testing shows any difference between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Internet use also varies considerably by socio-economic group; those living in DE households are less likely to be users (70%) and more likely to use it only at home (31% compared to 26%). There has been an increase in the number of adults who use the internet both at home and elsewhere: up to 56% in 2013 from 49% in 2012. Internet use outside the home is higher for 16-44s and lower for those aged 55+. This could reflect the popularity and versatility of mobile devices for accessing the internet.

Just as internet use varies by age, so too does volume of weekly use. Total claimed weekly volume of use is higher for 16-24s compared to all adults (24.2 vs. 16.9 hours) and is attributable to a greater volume of use at home and elsewhere (excluding use at work/ in education). Total weekly volume of use is lower among those aged 65+ compared to all adults (9.2 vs. 16.9 hours) while volume of workplace use is higher among 35-44s (5.4 vs. 4 hours).

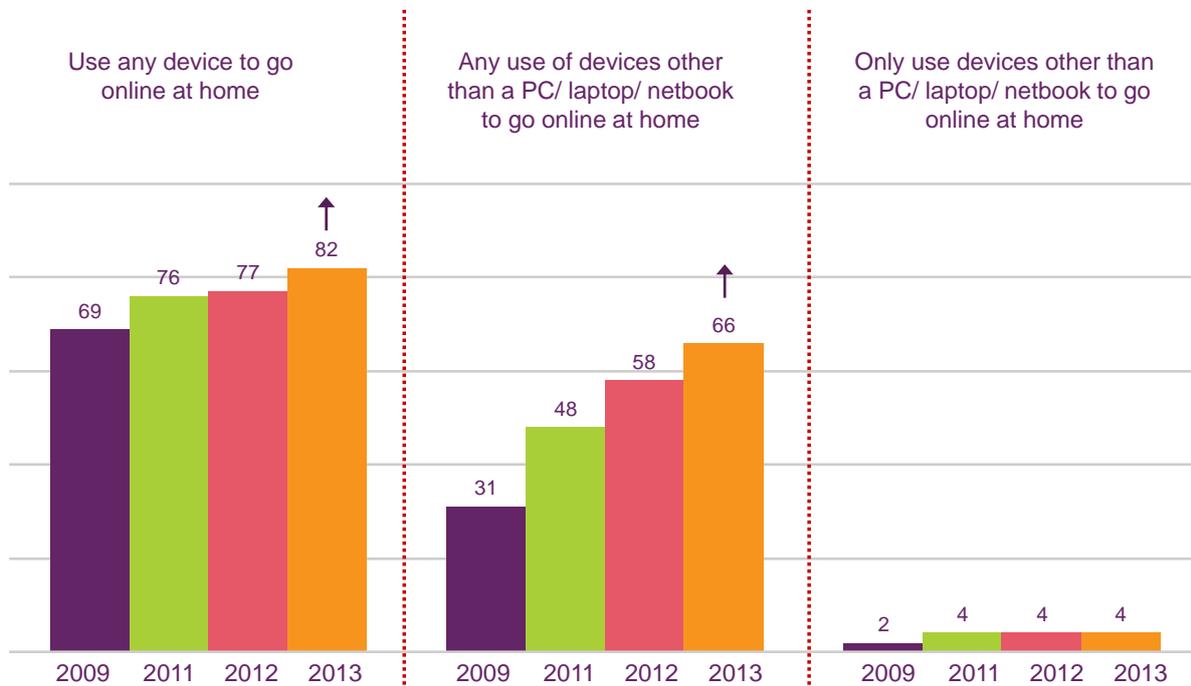
Adult internet users are also going online more frequently than in 2012; 79% say they go online daily, compared to 75% in 2012. Again, age plays a role here, with daily internet use lower among 55-64s (67%) and those aged 65+ (56%), and higher among 16-24s (92%) and 25-34s (87%). This is likely to be a result of younger people accessing the internet via mobile phones.

People are using more devices to go online

As shown in Figure 2 below, there is an increase of five percentage points since 2012 in the number of adults using any device to go online at home (82% vs. 77% in 2012).

While the PC/ laptop/ netbook is the most common device to access the internet at home, two-thirds of adults are also using alternative devices. This use is supplemental to using a PC/laptop/netbook, as only 4% of adults say they only use an alternative device to access the internet at home.

Figure 2: Going online at home using any device, by usage category: 2009-2013



IN1/ IN2- Do you or does anyone in your household have access to the internet at home through a computer, laptop or notebook? And do you personally use the internet at home?/ Do you have and use any of the items shown on this card to go online? (Prompted responses, single coded)
 Base: All adults aged 16+ (1824 in 2009, 2117 in 2010, 1823 in 2011, 1805 in 2012, 1642 in 2013). Significance testing shows any change between 2012 and 2013
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

As illustrated in Figure 3 below, the majority of adults have access to the internet at home (82%) and 83% of adults go online at all, on any device in any location. Over half of adults go online outside the home (57%).

Figure 3: Key measures of internet access and use: 2013

	As a % of all adults
Home internet access through a PC/ laptop/ netbook	82%
Go online at home through a PC/ laptop/ netbook	78%
Go online at home through an alternative device (mobile phone/ games console/ portable media player/ tablet computer/ E-book reader)	66%
Go online at home through a PC/ laptop/ netbook or an alternative device	82%
Go online outside the home	57%
Go online at all (on any device in any location)	83%

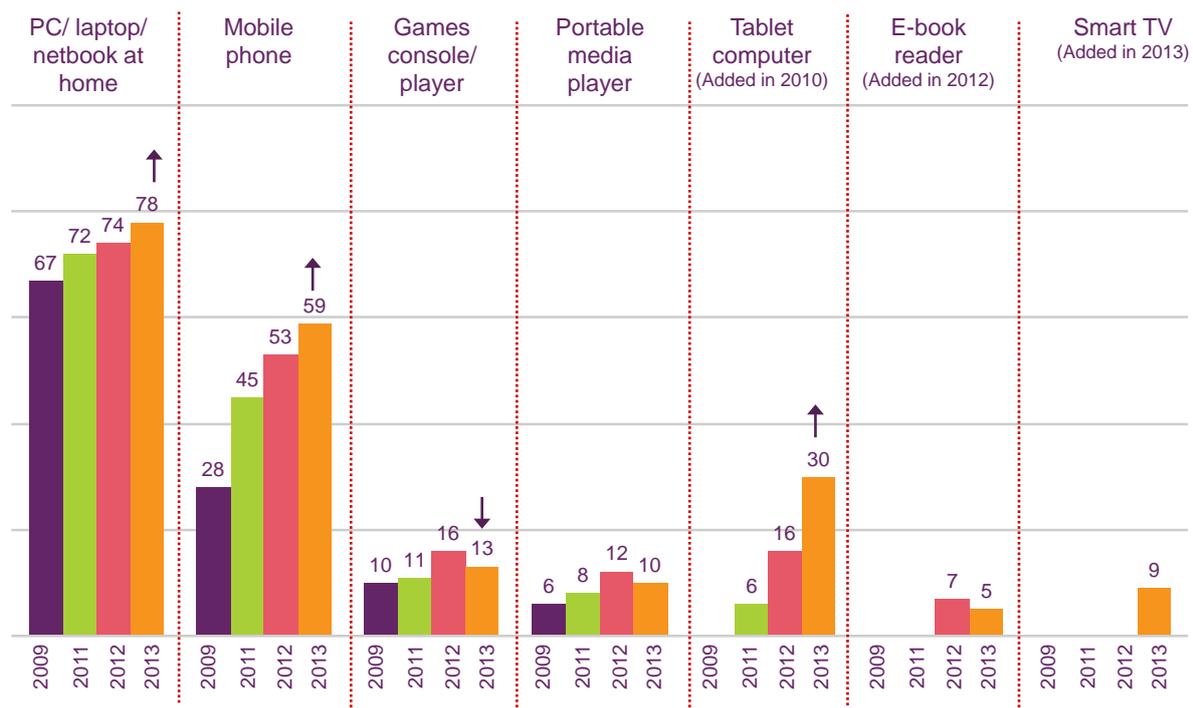
IN1/ IN2/ IN3 – Do you or does anyone in your household have access to the internet at home through a computer, laptop or notebook? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all? (Prompted responses, single coded)

Base: All adults aged 16+ (1642)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

As illustrated in Figure 4 below, the majority of adults go online using a PC/ laptop/ netbook (78%) or a mobile phone (59%). These measures have increased by four percentage points and six percentage points respectively since 2012. However, the biggest increase is seen in the use of a tablet to go online; almost doubling since 2012, with an increase of 14 percentage points from 16% to 30%.

Figure 4: Devices used to go online at home: 2009-2013



IN1/ IN2- Do you or does anyone in your household have access to the internet at home through a computer, laptop or notebook? And do you personally use the internet at home?/ Do you have and use any of the items shown on this card to go online? (Prompted responses, single coded)
 Base: All adults aged 16+ (1824 in 2009,1823 in 2011, 1805 in 2012, 1642 in 2013). Significance testing shows any change between 2012 and 2013
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

3.3 Tablets

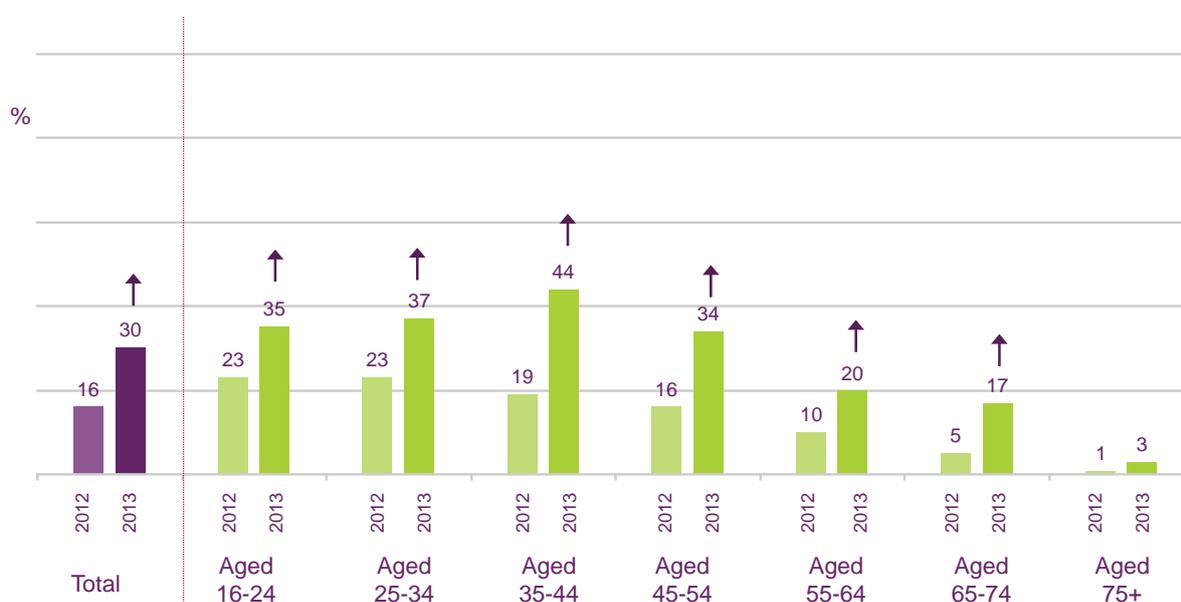
Twice as many people use tablets to go online in 2013 compared to 2012

The proportion of adults saying they use a tablet to go online has almost doubled, from 16% in 2012 to 30% in 2013, as shown in Figure 5 below.

There have been significant increases in using a tablet to go online across almost all age groups, including a doubling of incidence for those aged 35-44, 45-54 and 55-64, while those aged 65-74 are now three times more likely to go online using a tablet than in 2012 (17% vs. 5% in (2012)).

Compared to all adults, those aged 35-44 or in the AB socio-economic group are more likely to use a tablet to go online, while those aged 55 + or in the DE socio-economic group are less likely.

Figure 5: Use of a tablet PC to go online, by age: 2012-2013



IN1/ IN2- Do you or does anyone in your household have access to the internet at home through a computer, laptop or notebook? And do you personally use the internet at home?/ Do you have and use any of the items shown on this card to go online? (Prompted responses, single coded) Base: All adults aged 16+ (1805 in 2012, 1642 in 2013, 234 aged 16-24 in 2012, 224 aged 16-24 in 2013, 236 aged 25-34 in 2012, 260 aged 25-34 in 2013, 300 aged 35-44 in 2012, 270 aged 35-44 in 2013, 234 aged 45-54 in 2012, 226 aged 45-54 in 2013, 262 aged 55-64 in 2012, 262 aged 55-64 in 2013, 259 aged 65-74 in 2012, 211 aged 65-74 in 2013, 280 aged 75+ in 2012, 189 aged 75+ in 2013)

Significance testing shows any difference between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

3.4 Mobile phones

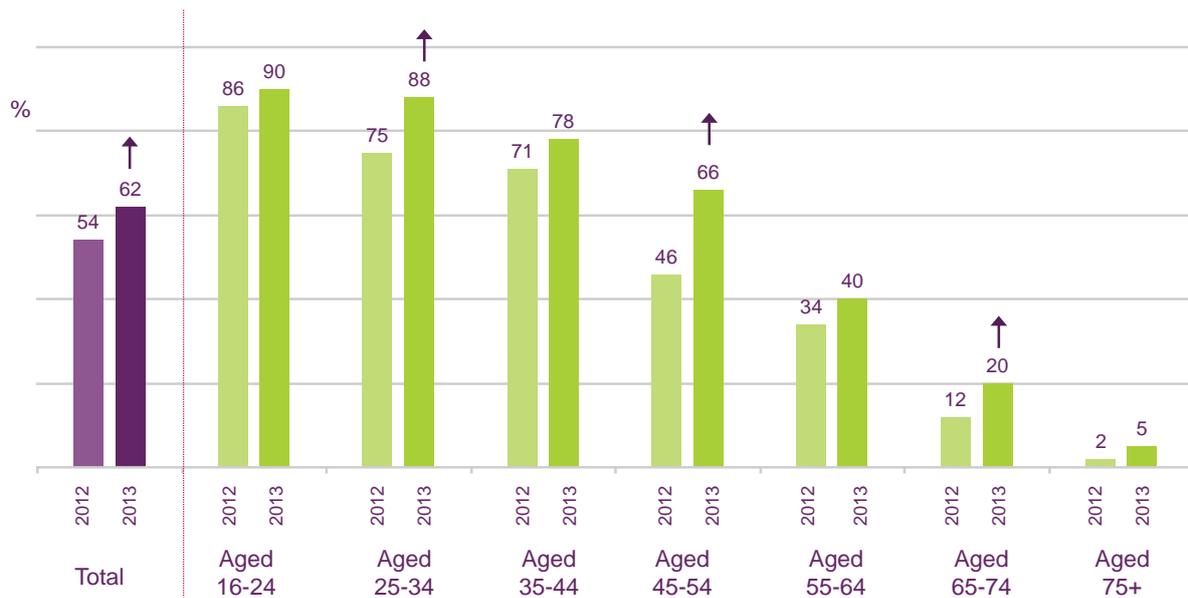
Six in ten adults now use a smartphone

Use of a mobile phone of any kind among all adults stands at 92%. Use among those aged 16-34 is almost universal at 99%, and 98% and 96% respectively for 35-44s and 45-54s. Use is slightly lower among 65-74s (82%) and those aged 75+ (57%).

While use of a mobile among all adults has not changed since 2012, there have been significant increases in the use of smartphones, with six in ten adults (62%) now using one compared to 54% in 2012. This is attributable to an increase in use among 25-34s (88% vs. 75%), 45-54s (66% vs. 46%) and those aged 65-74 (20% vs. 12%).

As highlighted in Figure 8 below, across all devices, the smartphone is the second most-missed device by all adults, however, those aged 16-24 and 25-34 would miss using it more than any device (47% and 36% respectively).

As illustrated in Figure 6 below with overall mobile phone ownership, use of a smartphone is higher among 16-24s (90%), 25-34s (88%) and 35-44s (78%) and lower among 55-64s (40%), 65-74s (20%) and those aged 75+ (5%).

Figure 6: Use of a smartphone, by age: 2012-2013

M2 – Do you personally use a smartphone? (Spontaneous responses, single coded)

Base: All adults aged 16+ (1805 in 2012, 1642 in 2013, 234 aged 16-24 in 2012, 224 aged 16-24 in 2013, 236 aged 25-34 in 2012, 260 aged 25-34 in 2013, 300 aged 35-44 in 2012, 270 aged 35-44 in 2013, 234 aged 45-54 in 2012, 226 aged 45-54 in 2013, 262 aged 55-64 in 2012, 262 aged 55-64 in 2013, 259 aged 65-74 in 2012, 211 aged 65-74 in 2013, 280 aged 75+ in 2012, 189 aged 75+ in 2013)

Significance testing shows any difference between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Reflecting the pattern of overall use/ ownership, six in ten adults (59%) aged 16+ now go online via a mobile phone. This is an increase of six percentage points since 2012 (53%) and is attributable to an increase among 25-34s (85% vs. 73% in 2012) and 45-54s (63% vs. 48%). It is also due to an increase among C1s (70% vs. 58%) and females (60% vs. 52%).

3.5 Apps

The majority of apps on phones or tablets are not used on a regular basis

For internet users who use apps mainly on a smartphone, six in ten (61%) say they have between one and 20 apps installed, around one in five (18%) have between 21 and 40, and one in seven (14%) have 41 or more.

With 23 being the mean number of apps installed, those with Apple OS have a higher average number of apps installed than users with Android OS (27 vs. 20 apps).

Although in this area there are no differences by age group, there are differences by gender; men have a greater average number of apps than women (26 vs. 21).

While the mean number of apps installed on smartphones is 23, the mean number used regularly is less than half: ten apps.

For those whose main device for using apps is a tablet PC, around half (49%) say that they have between one and 20 apps on their tablet. Around one in four (27%) say they have 21-40 apps and one in five (20%) have more than 40 apps.

The mean number of apps installed among these users is 28. However, the mean number of apps that they say are used regularly is ten, suggesting that, as is the case with apps on the smartphone, the majority of apps on tablets are not regularly used.

3.6 Gaming

Older age groups are becoming more active gamers

Close to half (47%) of all adults own either a fixed or portable games console, and this is broadly the same as in 2012. Also unchanged is the fact that younger adults are more likely than older adults to own a gaming device.

However, what has changed in 2013 is the number of adults who are playing games at home or elsewhere on any type of gaming device. This has increased from 35% in 2012 to 42% in 2013 and is driven by a six percentage point increase in the use of mobiles for gaming and a five percentage point increase in the use of tablets for gaming, as shown in Figure 7 below.

There is growing evidence that older age groups are becoming more active gamers than in the past. In particular, gaming on a mobile phone has more than doubled for the 45-54s (17% vs. 8% in 2012) and for the 55-64s (8% vs. 3% in 2012). Gaming on a mobile phone has also increased by 13 percentage points for 25-34s (32% vs. 19% in 2012).

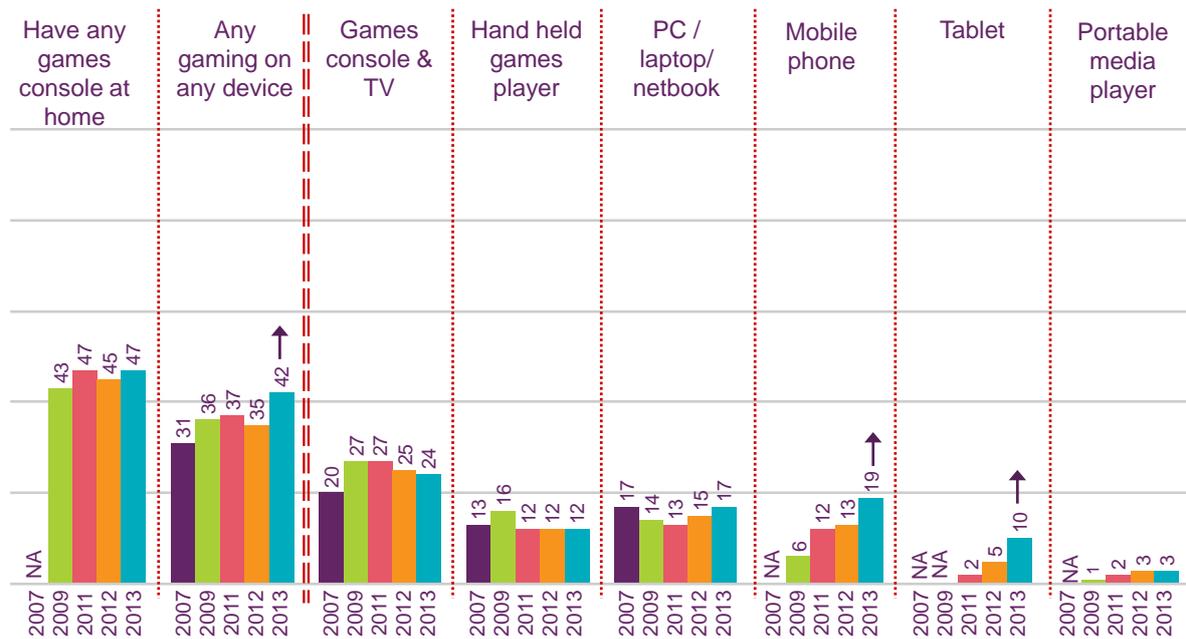
A similar picture emerges for gaming on tablets, with the incidence more than doubling for 25-34s (15% vs. 6% in 2012) and tripling since 2012 for the 45-54s (11% vs. 4%) and the 55-64s (6% vs. 2% in 2012).

There have also been increases in downloading games from the internet and online game playing. An overall increase, from 17% to 22%, for downloading games from the internet is driven by those aged 45-64, while an overall increase from 16% to 19% for online gaming is driven by 45-54s, with twice as many reporting that they play games online compared to last year (18% vs. 9% in 2012).

These increases are occurring as the use of gaming devices to go online is decreasing (16% vs. 13% in 2012) which suggests that there may be a connection with the increased use of mobile and tablets to go online.

Despite the increased interest by older adults in playing games over the internet, they still play for fewer hours per week (four hours for those aged 45+) than the average (5.2) for all adults. In contrast, 16-24s spend 7.9 hours a week playing games.

Figure 7: Ways of playing games at home or elsewhere: 2007, 2009, 2011, 2012 and 2013



G1/ G2 – Does your household have.../ Do you ever play games at home or elsewhere in any of these ways? (Prompted responses, multi-coded) – showing responses for >2% of all adults.

Base: All adults aged 16+ (2905 in 2007, 1824 in 2009, 2117 in 2010, 1823 in 2011, 1805 in 2012 1642 in 2013).

Significance testing shows any change between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

3.7 TV

Over half of online users say they have ever watched TV programmes or films online

Watching TV continues to be the media activity that is almost universally carried out, with 96% of adults watching TV regularly.

Just over half (54%) of online users say they have ever watched TV programmes or films online, on any device; this has not increased since 2012. This rises to seven in ten (71%) of those aged 16-24.

In 2013, adults were asked whether they went online at home using a smart TV. One in ten (9%) adults say they go online in this way, with those aged 45-54 nearly twice as likely to say they go online through a smart TV, compared to all adults (16% vs. 9%).

As in 2012, one in five (22%) of mobile phone users have ever watched a TV programme on a mobile phone, with one in eight (13%) doing so at least quarterly.

3.8 Radio

Eight in ten adults listen to radio

Eighty-four per cent of adults say they listen to radio in any way in any location. Seven in ten (69%) listen at home, while considerably less (15%) only listen in locations outside the home.

Younger people (16-24s) are less likely to listen to radio anywhere, compared to all adults (75% vs. 84%), and are more likely to listen only outside the home (22% vs. 15%). This could be linked to their use of smartphones.

Those aged 35-44 and 45-54 are most likely to listen to radio both at home and elsewhere, while those aged 75+ are much more likely to listen to radio only at home (43% vs. 13%).

There are some socio-economic differences in relation to radio listening. Adults in AB households are more likely than all adults to listen to radio through any means in any location (91% vs. 84%), while those in DE households are less likely (78% vs. 84%).

3.9 Most-missed media

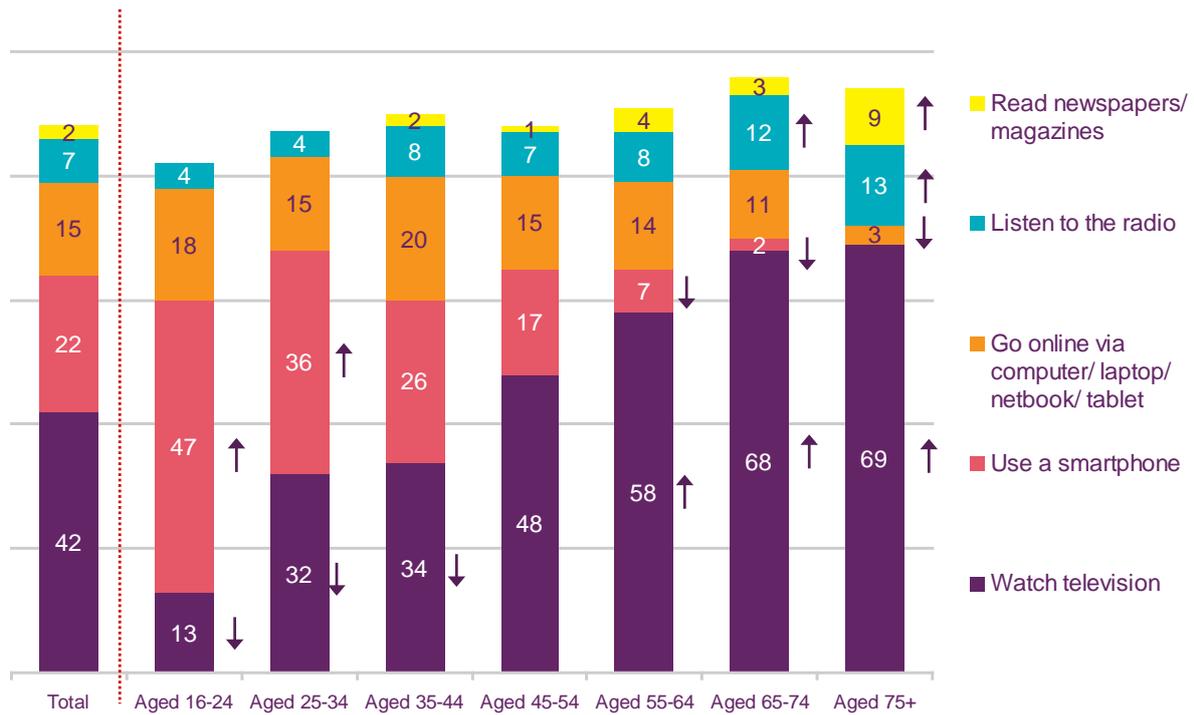
TV continues to be the media that adults would most miss

Looking across all platforms, watching television continues to be the media activity that adults say they would most miss doing in 2013 (42%). However, this varies considerably by age group, with only 13% of 16-24s nominating TV, compared to around one third of 25-44s, and nearly seven in ten people aged 65+.

Among all adults, half as many people say that they would most miss using a smartphone (22%) and 15% say that they would most miss going online through a PC/ laptop/ netbook or tablet.

As illustrated in Figure 8 below, there are significant differences by age. Younger adults are considerably more likely to miss using their smartphone; almost half of 16-24s and over a third of 25-34s nominated this. In contrast, almost seven in ten older adults (75+) say they would miss watching TV most, followed by listening to the radio.

Figure 8: Most-missed media – top five mentions among all adults: 2013



A2 – Which one of these would you miss doing the most? (Prompted responses, single coded) – NB Showing the five most popular responses in 2013 at an overall level

Base: All adults aged 16+ (1642 aged 16+, 224 aged 16-24, 260 aged 25-34, 270 aged 35-44, 226 aged 45-54, 262 aged 55-64, 211 aged 65-74, 189 aged 75+). Significance testing shows any difference between any age group and all adults aged 16+

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

4 Media activities

This section describes the range of media activities that adults undertake and their preferred devices for some activities. It covers a range of media activities across various platforms and provides trends over time as well as differences by demographic group.

This section also looks in detail at a broad range of online activities, grouped into themed sections: discovering content; communicating and participating; online transactions; administrative tasks; watching and listening online; public and civic activities, creating and publishing; general entertainment; and preferences for apps or browsers.

Within this section we report on two frequencies, those who have ever carried out an activity and those who *regularly* (at least quarterly) carry out an activity. A comprehensive chart pack of all the findings in this section, including by age and demography, can be found at www.ofcom.org.uk/medialiteracyresearch.

4.1 Section overview

- In 2013 there was a decrease in regular reading of newspapers/ magazines (66% vs. 71% in 2012) and a decrease in watching videos/ DVDs/ Blu-rays (55% vs. 63% in 2012). There has been no change since 2012 in regularly watching TV (96%), using a mobile phone (85%), going online (75%) and listening to the radio (70%).
- Surfing or browsing the internet is an almost universal activity, with 94% of internet users ever doing it – up by four percentage points since 2012. Activities linked to communicating with others are also popular, with 90% of internet users sending email and almost two-thirds using IM services (64%) at least quarterly.
- More than four in ten adults who go online (42%) have ever used services like Skype or FaceTime.
- Search engines are by far the most important source of information online and although a majority of people read online reviews, only a minority write them.
- Phone calls and texts continue to be the dominant mobile activities. But more mobile phone users are now using their phones for a wider range of communication, entertainment and transactional activities. Over half use their mobile phone for sending/ receiving email (55%), or visiting social networking sites or apps (53%), while 48% ever send or receive video clips, 45% visit sites or apps like YouTube or Vine to look at videos or clips posted by other people, 38% use instant messaging. Four in ten (38%) mobile phone users ever upload photos or videos, while one in four (25%) ever send or receive Twitter updates. A sizeable minority (13%) of mobile users watch TV programmes on their phone at least quarterly.
- Using a mobile to text or phone is the preferred way to arrange to meet a friend, and since 2012 respondents are less likely to say that they would prefer to use the home landline (23% vs. 28%) for this activity.
- Adults say their preferred way to complete government processes is via email/ websites and six in ten (61%) internet users say they have ever completed government processes online. However, the incidence of this being regularly carried out (at least quarterly) has fallen to 28% from 33% in 2012.

4.2 Regular media activities

Fewer people are regularly reading newspapers or watching DVDs

Each year we ask respondents about ten specific media activities. As illustrated in Figure 9 below, six of these activities continued to be undertaken on a regular basis by the majority of adults in 2013. As in previous years, watching TV on a regular basis was the most popular media activity, followed by using a mobile and going online via a PC/ laptop/ netbook.

Watching TV is an almost universally-undertaken activity (96%), with little age variation. Variations by age are more pronounced among the 85% of adults who use a mobile phone and the 75% of adults who regularly go online via a PC/ laptop/ netbook.

In 2013 there were decreases in two of the activities regularly undertaken by a majority of adults; reading newspapers/ magazines has fallen to 66% (vs. 71% in 2012) and watching videos/ DVDs/ Blu-rays has decreased by eight percentage points to 55% (64% in 2012). Access to video-on-demand content may be a factor in the move away from watching videos, DVDs and Blu-rays.

There have also been decreases in two of the activities regularly undertaken by a minority of adults in 2013; listening to a portable music device/MP3 player has fallen by six percentage points since 2012 to 30%, and using a portable media player has fallen by four percentage points to 17%.

Figure 9: Regular media activities, by age: 2013

	2013 Total	16-24	25-34	35-44	45-54	55-64	65-74	75+
Watch television	96%	91% ↓	94%	95%	96%	99% ↑	99% ↑	98%
Use a mobile phone	85%	95% ↑	95% ↑	94% ↑	89%	83%	71% ↓	46% ↓
Go online (via PC/ laptop/netbook/tablet)	75%	87% ↑	81%	87% ↑	85% ↑	71%	50% ↓	25% ↓
Listen to the radio	70%	56% ↓	66%	72%	76%	76%	73%	76%
Read newspapers/ magazines	66%	50% ↓	61%	66%	65%	76% ↑	75% ↑	76% ↑
Watch videos/ DVDs/ Blu-rays	55%	68% ↑	63% ↑	63% ↑	53%	47% ↓	46% ↓	26% ↓
Listen to music on a hi-fi/ CD/ tape player	44%	40%	41%	45%	46%	52% ↑	42%	30% ↓
Listen to a portable music device/ MP3 player	30%	61% ↑	34%	35%	29%	18% ↓	10% ↓	4% ↓
Play console/ computer games	26%	53% ↑	39% ↑	27%	21%	11% ↓	6% ↓	1% ↓
Use a portable media player	17%	31% ↑	25% ↑	20%	15%	10% ↓	3% ↓	2% ↓

A1 – Which of the following do you regularly do? (Prompted responses, multi-coded)

Base: All adults aged 16+ (1642 aged 16+, 224 aged 16-24, 260 aged 25-34, 270 aged 35-44, 226 aged 45-54, 262 aged 55-64, 211 aged 65-74, 189 aged 75+). Significance testing shows any difference between any age group and all adults aged 16+

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

4.3 Regular online activities

The majority of internet users regularly undertake nine online activities

To create a broad picture of the range of online activities undertaken on a regular basis, we asked internet users about 34 specific online activities, representing a range of interests. As shown in Figure 10 below, the results show that the majority of internet users undertake nine activities at least quarterly (every three months).

Surfing or browsing the internet is an almost universal activity, and activities linked to communicating with others are also very popular, with 90% of internet users sending emails, 69% visiting social networking sites and almost two-thirds (64%) using instant messaging services.

Online transactions are also popular; two in three (66%) internet users make online purchases and six in ten (61%) do online banking or pay bills online at least quarterly.

The average number of different websites visited in a typical week is 20, unchanged since 2012, and there is little variation by age across 16-64s, compared to all adults, although those aged 65+ are almost twice as likely as all internet users to visit between one and four websites a week (40% vs. 22%).

Figure 10: Online activities undertaken at least quarterly, by age: 2013

	2013 Total	16-24	25-34	35-44	45-54	55-64	65+
General surfing/ browsing the internet	91%	95%	93%	95% ↑	92%	85% ↓	77% ↓
Sending and receiving emails	90%	90%	91%	94% ↑	89%	87%	77% ↓
Looking at social networking sites/ apps	69%	96% ↑	85% ↑	72%	66%	37% ↓	30% ↓
Buying things online	66%	65%	71%	72%	65%	57%	50% ↓
Using Instant Messaging services	64%	91% ↑	78% ↑	70%	59%	31% ↓	26% ↓
Banking and paying bills online	61%	54%	68%	73% ↑	59%	58%	35% ↓
Finding information for your work/ job/ studies	57%	75% ↑	59%	65%	55%	49% ↓	21% ↓
Looking at news websites or apps	54%	52%	58%	60%	52%	54%	37% ↓
Find information for your leisure time including cinema and live music	53%	69% ↑	62% ↑	54%	45%	45%	27% ↓
Watch online or download short video clips such as music videos or comedy clips	48%	74% ↑	58% ↑	47%	42%	31% ↓	16% ↓
Watch online or download TV programmes or films	40%	54% ↑	44%	42%	37%	29% ↓	25% ↓
Finding information about public services provided by local or national government	40%	40%	42%	44%	38%	40%	27% ↓
Listen to or download music online	39%	70% ↑	53% ↑	34%	30% ↓	22% ↓	8% ↓
Sharing links to websites or online articles – perhaps on Twitter, Facebook, Reddit or LinkedIn	38%	61% ↑	52% ↑	42%	32%	12% ↓	9% ↓
Finding information about health related issues	37%	34%	44%	40%	37%	26% ↓	29% ↓
Downloading software	33%	42% ↑	41% ↑	35%	30%	18% ↓	13% ↓
Filling in a form or application online	32%	41% ↑	34%	37%	31%	22% ↓	14% ↓
Looking at sites or apps for news about, or events in your local area/ the local community	32%	28%	32%	38%	30%	32%	25%
Finding information for booking holidays	31%	23% ↑	29%	40% ↑	30%	40% ↑	28%
Playing games online	30%	50% ↑	35%	26%	26%	17% ↓	17% ↓
Looking at job opportunities	29%	53% ↑	40% ↑	27%	28%	8% ↓	1% ↓
Complete government processes online – such as register for tax credits, renew driving licence, car tax or passport	28%	19% ↓	30%	33%	33%	27%	17% ↓
Making or receiving telephone or video calls using services like Skype or FaceTime	26%	43% ↑	33% ↑	28%	15% ↓	14% ↓	13% ↓
Selling things online	22%	24%	31% ↑	24%	20%	13% ↓	5% ↓
Send or receive Twitter updates	22%	41% ↑	27%	22%	19%	5% ↓	4% ↓
Listening to radio stations online	21%	29% ↑	25%	20%	18%	17%	12% ↓
Maintaining a website or blog	16%	24% ↑	19%	17%	14%	6% ↓	3% ↓
Looking at political/ campaign/ issues websites	14%	13%	17%	14%	15%	14%	10%
Doing an online course to achieve a qualification	9%	16% ↑	9%	10%	8%	5%	2% ↓
Sign an online petition	8%	6%	7%	10%	10%	70%	5%
Online gambling	6%	13% ↑	8%	7%	3%	2% ↓	3%
Looking at adult-only websites or apps	6%	9%	8%	5%	8%	4%	3%
Contact a local councillor or your MP online	4%	2%	4%	2%	5%	4%	5%
Visiting dating websites	3%	5%	4%	3%	2%	1%	1% ↓

IN17/ 18 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded) Base: All adults aged 16+ who use the internet at home or elsewhere (1746 in 2005, 2905 in 2007, 1282 in 2009, 1369 in 2011, 1381 in 2012, 1272 in 2013). Significance testing shows any change between 2012 and 2013 where it is possible to make a comparison. Source: Ofcom research, fieldwork carried out by Saville Rosstiter-Base in October to November 2013

Figure 11: Online activities undertaken at least quarterly: 2011, 2012, 2013

	2011	2012	2013
General surfing/ browsing the internet	85%	88%	91% ↑
Sending and receiving emails	87%	89%	90%
Looking at social networking sites/ apps	61%	64%	69% ↑
Buying things online	-	-	66%
Using Instant Messaging services (2013 / Using online chat rooms or Instant Messaging (2011+))	38%	36%	64%
Banking and paying bills online	56%	59%	61%
Finding information for your work/ job/ studies	60%	57%	57%
Looking at news websites or apps	51%	54%	54%
Find information for your leisure time including cinema and live music	57%	60%	53% ↓
Watch online or download short video clips such as music videos or comedy clips	45%	52%	48%
Watch online or download TV programmes or films	35%	40%	40%
Finding information about public services provided by local or national government	40%	42%	40%
Listen to or download music online	40%	44%	39% ↓
Sharing links to websites or online articles – perhaps on Twitter, Facebook, Reddit or LinkedIn	-	-	38%
Finding information about health related issues	36%	41%	37%
Downloading software	33%	36%	33%
Filling in a form or application online	-	-	32%
Looking at sites or apps for news about, or events in your local area/ the local community	-	41%	32% ↓
Finding information for booking holidays	35%	36%	31% ↓
Playing games online	23%	26%	30%
Looking at job opportunities	34%	34%	29% ↓
Complete government processes online – such as register for tax credits, renew driving licence, car tax or passport	25%	33%	28% ↓
Making or receiving telephone or video calls using services like Skype or FaceTime (2013) / Making or receiving calls over the internet (e.g. Skype) (2011+)	20%	26%	26%
Selling things online	-	-	22%
Send or receive Twitter updates	12%	20%	22%
Listening to radio stations online	22%	23%	21%
Maintaining a website or blog	16%	16%	16%
Looking at political/ campaign/ issues websites	13%	15%	14%
Doing an online course to achieve a qualification	8%	8%	9%
Sign an online petition	5%	8%	8%
Online gambling	4%	5%	6%
Looking at adult-only websites or apps	5%	7%	6%
Contact a local councillor or your MP online	3%	5%	4%
Visiting dating websites	3%	3%	3%

4.4 Regular mobile activities

Nine in ten adults use a mobile phone and six in ten use a smartphone. To get a sense of the range of mobile activities undertaken on a regular basis we asked mobile users about 22 mobile activities.

As illustrated in Figure 12 below, seven of these mobile activities are undertaken at least quarterly by a majority of mobile phone users, with phone calls and texts continuing to be the dominant activities. A sizeable minority (13%) watch TV programmes on their phone at least quarterly, but this activity is stratified by age, with younger users (aged 16-24) more likely to undertake it than all users.

The incidence of smartphone users undertaking these activities at least quarterly is even higher, with 74% sending or receiving email (up from 69% in 2012), 73% using their smartphone to visit social networking sites (up from 66% in 2012), 45% uploading photos or videos (25% in 2012²), 51% using instant messaging (29% in 2012³) and 29% making or receiving calls on services like Skype or FaceTime (22% in 2012⁴).

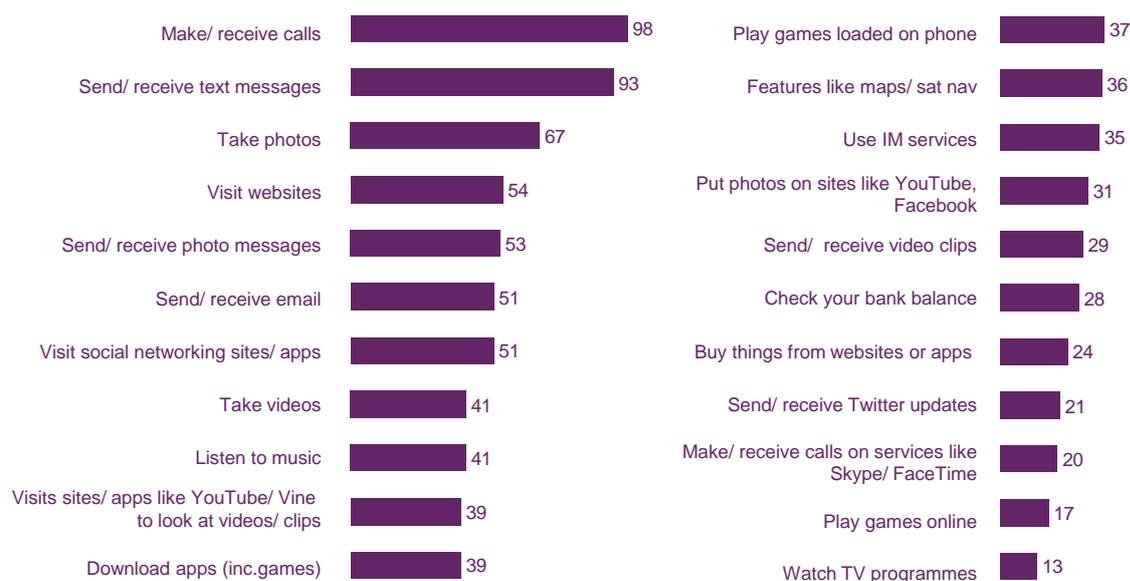
Nearly all smartphone users who go online on their phone, say they use apps on their phone (94%) and close to nine in ten who go online on their tablet say they use apps (86%). More than half of those who say they go online using their smart TV say they use apps on their smart TV (56%).

² The question was amended in 2013 – in 2011 and 2012 it asked how often mobile phone users 'put photos or videos on sites like YouTube or Bebo for others to see'. In 2013 it asked about 'putting photos or videos on sites like YouTube, Facebook or Instagram for others to see' which could contribute to the increase seen since 2012.

³ The question was amended in 2013 - The question wording in 2011 and 2012 referred to 'use instant messaging (MSN/ Windows Live Messenger, AOL Instant Messenger/ AIM etc.)'. In 2013 it referred to 'use instant messaging such as Apple iMessage, WhatsApp, Facebook Messenger Chat, BlackBerry Messenger/ BBM' which could contribute to the increase shown since 2012

⁴ The question was amended in 2013 - In 2012 it referred to 'using your phone to make or receive calls over the internet (as opposed to over your mobile providers network) on services such as Skype'. In 2013 the question referred to 'Making or receiving telephone or video calls over the internet using services like Skype or FaceTime' which could contribute to the increase since 2012.

Figure 12: Use of a mobile phone at least quarterly: 2013



M8 - Please tell me, from this list, the types of things you use your mobile phone for, and how often you do each.(Prompted responses, single coded)

Base: All adults aged 16+ who use a mobile phone (1465 in 2013)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

4.5 Discovering/ finding/ searching for content

This section explores how adults navigate their way through the wide range of information online, and their preferred devices for finding particular types of content.

Surfing or browsing the internet is an almost universal activity

As shown in Figure 10 above, 91% of internet users surf or browse the internet at least quarterly. *Ever* having surfed or browsed the internet has increased by four percentage points since 2012 as a result of increases in the 35-44 age group, among those living in C1 and DE households, and among females.

Seven in ten (68%) say their preferred device for surfing or browsing the internet is the PC/ laptop/ netbook, with the next most-preferred device being a mobile phone/ smartphone (19%). One in ten nominated a tablet computer (11%). Users aged 16-24 and 25-34 are less likely than all users to say they prefer to surf/ browse using a PC/ laptop/ netbook and more likely to say they prefer to use a mobile phone/ smartphone. The reverse is true for users aged 55-64 and 65+.

There is no change overall since 2012 in using the internet to find information for work/ job/ studies, with 68% of internet users ever having done this. Similarly, there is no change in finding news online; seven in ten (70%) of internet users have ever looked at news websites or apps and over half (54%) do so at least quarterly.

Six in ten (57%) say their preferred device for looking at news online is the PC/ laptop/ netbook, with the next most-preferred device being a mobile phone/ smartphone (26%). One in eight nominated a tablet computer (13%).

As is the case for surfing and browsing, younger users are less likely than all users to say they prefer to look at news websites/ apps using a PC/ laptop/ netbook, and more likely to say they prefer to use a mobile phone/ smartphone. The reverse is true for users aged 55-64 and 65+.

In contrast, there has been a decrease in four other activities.

Finding information for booking holidays has decreased by six percentage points since 2012 among all internet users, and is attributable to a decrease among those aged 55-64 (72% vs. 83% in 2012), those living in DE households and females.

Finding information for leisure activities, including cinema and live music, has decreased by four percentage points since 2012. This decrease is not evident at an overall level for any age group, but 45-54s are less likely to look for this information at least quarterly, compared to 2012 (45% vs. 57% in 2012), and it is also evident for those in AB households and among males.

Similarly, ever going online to find information about public services provided by local or national government has also decreased by four percentage points since 2012 (70% vs. 74% in 2012).

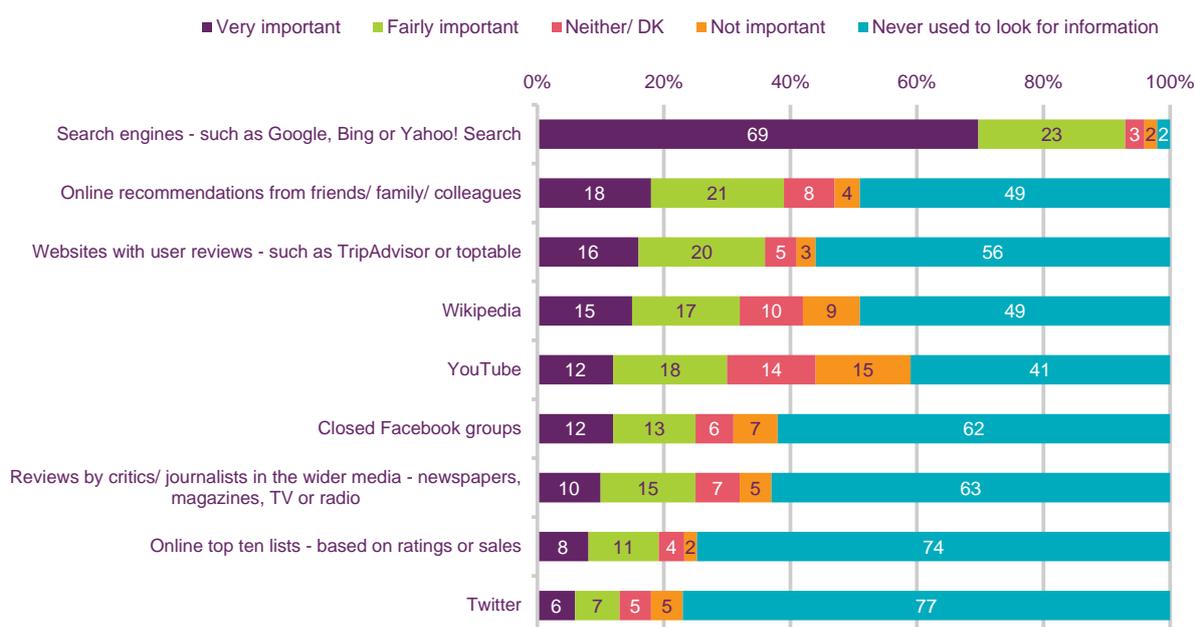
Regarding finding information online about health-related issues, seven in ten internet users say they ever do this, a decrease of five percentage points since 2012, driven by those aged 55-64.

Search engines are by far the most important source of information online

Given the volume of information available on the internet, respondents were asked about the use and importance of a variety of information sources.

Virtually all internet users (98%) say they have ever used search engines to look for information, and 69% of all users say this is a very important information source, with an additional 23% saying it is fairly important. As shown in Figure 13 below, search engines are the only information source for which a majority of its users rate it as very important to them.

Figure 13: Use and importance of information sources: 2013



Q3A – Which, if any, of these sources have you used to look for information online?/ Q3B – Please use this card to say how important each of the following sources of information are to you, if at all. (prompted responses, multi coded)

Base: All internet users age 16+ (1032).

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

YouTube is also used by a majority of internet users to look for information (59%), and one in eight of all internet users (12%) say it is a very important information source. Among YouTube users, this equates to 20% considering it a very important source.

Around half of all internet users have ever used Wikipedia (51%), or an online recommendation from friends/ family/ colleagues (51%) to look for information. Less than one in five of all internet users say that Wikipedia (15%) or an online recommendation from friends/ family/ colleagues (18%) is a very important information source. Among Wikipedia users, this equates to 29%, and among users of online recommendations from friends/ family/ colleagues, 35%.

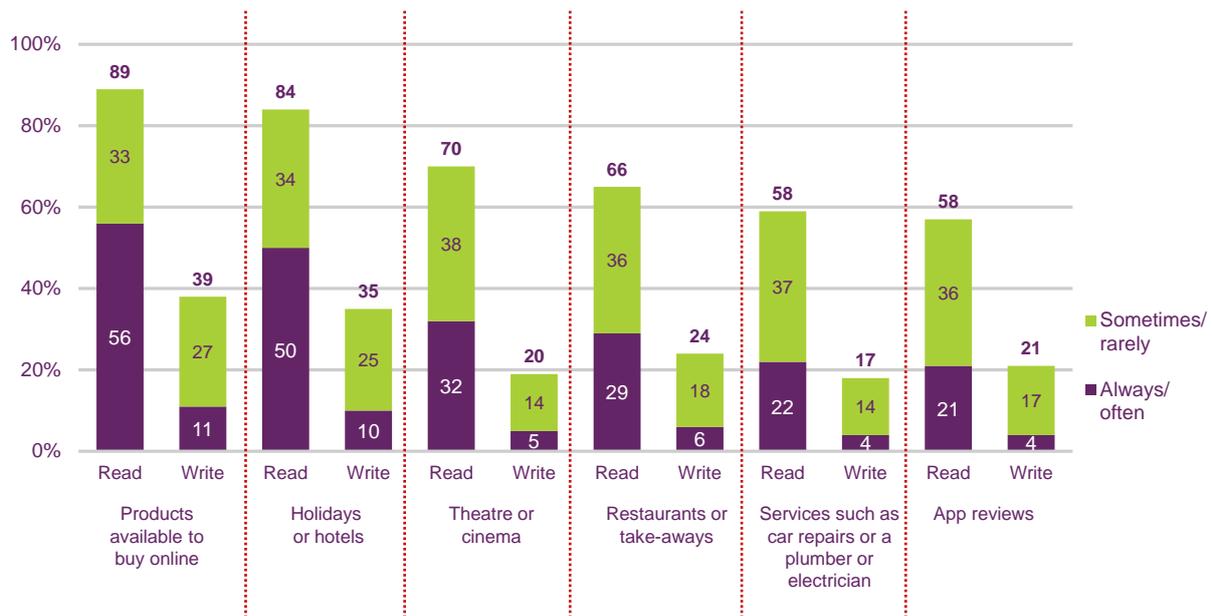
A majority of internet users read online reviews but only a minority write them

The majority of internet users say they ever read online reviews before undertaking any of the activities we asked about. As illustrated in Figure 14 below, more than half (56%) say they always, or often, read online reviews about products available to buy online, while half always, or often, read reviews about holidays or hotels (50%).

More than eight in ten ever read reviews for either of these activities. Six in ten (58%) of those who use apps ever read app reviews, with one in five (21%) always, or often, doing so.

In contrast, only a minority of those undertaking each activity (between 4% - 10% depending on the activity) say they often write reviews. Four in ten ever write online reviews about products available to buy online (39%) with slightly fewer ever writing reviews online about holidays or hotels (35%). One in five (21%) of those who use apps ever write app reviews.

Figure 14: Frequency of reading/ writing online reviews or app reviews in advance (among those undertaking each activity): 2013



Q5A-E/ Q6A-E/ Q37A/ B – Please use this card to say how often, if at all, you look at online reviews that other people – not professional critics or journalists – have written or posted before you do each activity I read out. Do you read reviews about?/ – And how often, if at all, do you write online reviews for other people to read once you have done each activity I read out. Do you write reviews about? How often do you read app reviews from other users before downloading the app/ How often do you write app reviews that will appear alongside the app for others to see (Prompted responses, single coded)

Base: Adult internet users aged 16+ who ever undertake each activity (variable base)/ Adult internet users aged 16+ who use apps on a smartphone/ tablet/ smart TV (724)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

4.6 Communicating/ participating

More than half of mobile users send or receive email via their phones

There are a wide range of devices and services that people can use to communicate and participate online. We asked a series of questions designed to provide insight into how people use these services, on which devices they use them and what their preferred devices and services are.

Among internet users, using email is an almost universal online activity, with 95% of internet users having ever sent/ received emails, and 90% doing so at least quarterly. Both these figures are unchanged since 2012.

There are few differences by age, but adults aged 35-44 are more likely, compared to all adults, to send/receive emails quarterly (94%), while those aged 65+ are less likely to do this quarterly (77%) or to have ever done it (84%). Adults living in AB households are more likely than all adults to ever send/ receive email (99% vs. 95% for all adults) while those living in DE households are less likely (89% vs. 95% for all adults).

More than half of mobile phone users have ever used their mobile phone for sending/ receiving emails (55%), with 51% doing this at least quarterly. This represents an increase of ten percentage points since 2012 in the proportion having ever used their mobile phone for email and, as highlighted in Figure 15 below, is attributable to an increase since 2012 among those aged 25-34, 35-44, 45-54, and 65+.

While this increase is likely to be linked to the general increase in use of smartphones, it highlights the shifting patterns of digital communication and the growth in mobile connectivity.

Those living in AB households are more likely to have used their mobile for sending or receiving emails via their phones compared to all mobile phone users in 2013 (62% vs. 55% for all). The increase since 2012 is driven by increases in C1 households (up 12 percentage points to 64%), C2 households (up 13 percentage points to 49%) and DE households (up 11 percentage points to 43%). There are also increases for males (57% vs. 48%) and females (53% vs. 43%) since 2012.

Figure 15: Frequency of sending or receiving email on a mobile phone, by age: 2012 and 2013



M8P – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded)

Base: All adults aged 16+ who use a mobile phone (1608 in 2012, 1465 in 2013, 231 aged 16-24 in 2012, 222 aged 16-24 in 2013, 229 aged 25-34 in 2012, 258 aged 25-34 in 2013, 298 aged 35-44 in 2012, 262 aged 35-44 in 2013, 227 aged 45-54 in 2012, 217 aged 45-54 in 2013, 238 aged 55-64 in 2012, 234 aged 55-64 in 2013, 385 aged 65+ in 2012, 272 aged 65+ in 2013) Significance testing shows any change between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Almost half of all mobile users have ever sent/ received video clips on their mobile phones and 42% of internet users have ever used services like Skype or FaceTime

Using mobile phones to make and receive calls also continues to be a near-universal activity with 98% of all mobile phone users doing this at least quarterly and 99% having ever done it. Similarly, 93% of all mobile phone users use their mobile phone to send/ receive texts at least quarterly, with 94% having ever done so.

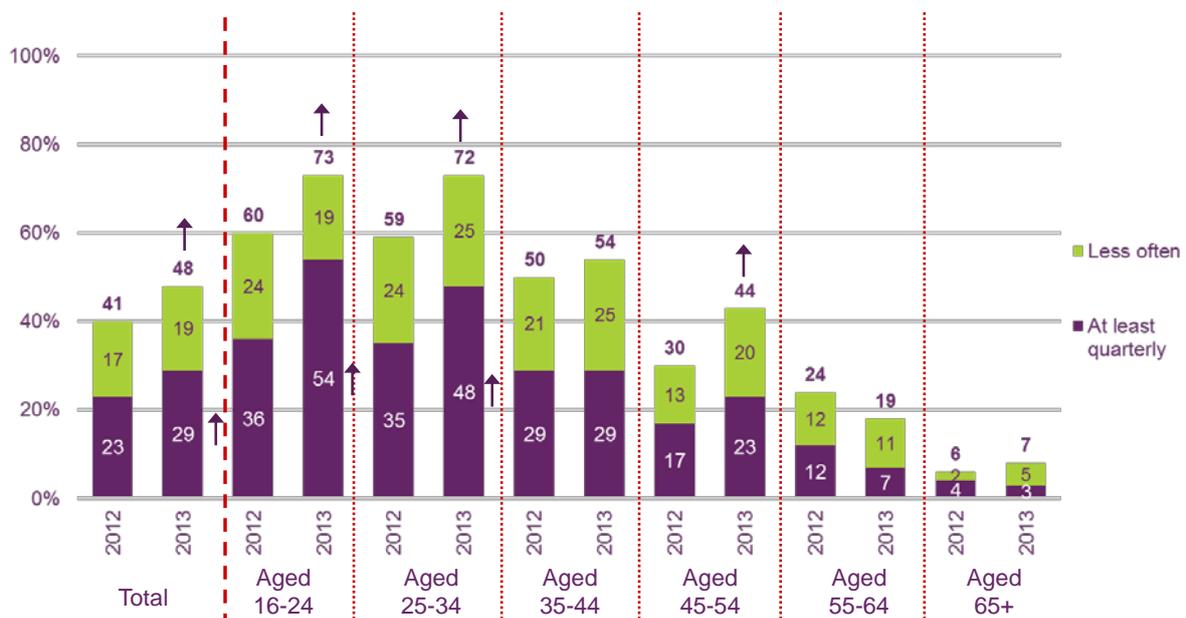
Considerably fewer mobile users (67%) have ever used their phone to send/ receive photo messages, while just over half (53%) do this at least quarterly. Sending and receiving photo messages via mobiles is more prominent among younger adults, with 92% of 16-24s, 87% of 25-34s and 77% of 35-44s having ever done this, compared to 67% of all adults.

While there has been no change since 2012 in the frequency of sending or receiving text or picture message via mobiles, a different picture emerges for sending or receiving video clips on a mobile phone. Figure 16 below shows that close to half (48%) of mobile users have

ever sent/ received video clips on their mobile phones and three in ten (29%) so do at least quarterly.

Both these measures have increased since 2012 (seven percentage points for the 'ever' measure and six percentage points for the 'at least quarterly' measure, and were primarily driven by those aged 16-24, 25-34 and 45-54. This may be linked to the increase in the use of smartphones by those aged 25-34 and 45-54, as illustrated in Figure 6. As a result, in 2013, almost three-quarters of mobile users aged 16-24 (73%) and 25-34 (72%) say they have ever sent or received video clips on their mobile phones. As with photo messages, compared to all mobile users, those living in C1 households are more likely, while DEs are less likely to have ever done this.

Figure 16: Frequency of sending or receiving video clips on a mobile phone, by age: 2012 and 2013



M8D – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded)

Base: All adults aged 16+ who use a mobile phone (1608 in 2012, 1465 in 2013, 231 aged 16-24 in 2012, 222 aged 16-24 in 2013, 229 aged 25-34 in 2012, 258 aged 25-34 in 2013, 298 aged 35-44 in 2012, 262 aged 35-44 in 2013, 227 aged 45-54 in 2012, 217 aged 45-54 in 2013, 238 aged 55-64 in 2012, 234 aged 55-64 in 2013, 385 aged 65+ in 2012, 272 aged 65+ in 2013) Significance testing shows any change between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

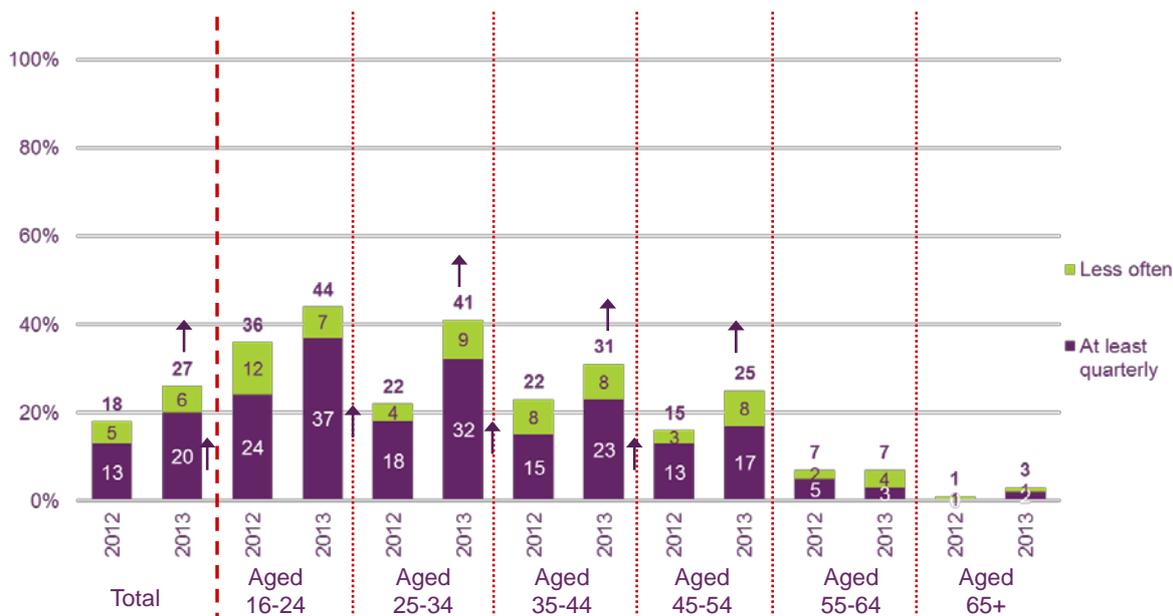
In terms of using the internet to make video or voice calls, more than four in ten internet users (42%) have ever used services like Skype or FaceTime; this is a significant increase from 36% in 2012⁵. Around a quarter of users (26%) use these services at least quarterly.

Again, there are differences by age, with more than half of 16-24s having ever done this (56%) compared to around one in four 55-64s (25%) and over-65s (25%). There is a marked difference by socio-economic group, with half of all internet users in AB (50%) and C1 (48%) households using services like Skype or FaceTime, compared to a quarter of internet users in DE households (26%).

⁵ The question was amended in 2013 - In 2012 it referred to 'making or receive calls over the internet on services such as Skype'. In 2013 the question referred to 'Making or receiving telephone or video calls over the internet using services like Skype or FaceTime' which could contribute to the increase since 2012.

There has also been an increase in adults using a mobile phone to make or receive telephone or video calls using services like Skype or FaceTime. Over a quarter of mobile phone users have ever made or received telephone or video calls using these services. As shown in Figure 17 below, this nine percentage point increase, from 18% in 2012 to 27% in 2013⁶, is driven by increases among 25-54s, and by increases in C1, C2 and DE households as well as among male and female mobile users.

Figure 17: Frequency of making or receiving telephone or video calls over the internet, via services like Skype or FaceTime, on a mobile phone, by age: 2012 2013



M8Q – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded) NB Question wording in 2011 and 2012 referred to 'Use your phone to make or receive calls over the internet (as opposed to over your mobile provider's network) on services such as Skype' amended in 2013 to refer to 'Make or receive telephone or video calls over the internet, using services like Skype or FaceTime' which could contribute to the increase shown since 2012

Base: All adults aged 16+ who use a mobile phone (1608 in 2012, 1465 in 2013, 231 aged 16-24 in 2012, 222 aged 16-24 in 2013, 229 aged 25-34 in 2012, 258 aged 25-34 in 2013, 298 aged 35-44 in 2012, 262 aged 35-44 in 2013, 227 aged 45-54 in 2012, 217 aged 45-54 in 2013, 238 aged 55-64 in 2012, 234 aged 55-64 in 2013, 385 aged 65+ in 2012, 272 aged 65+ in 2013) Significance testing shows any change between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Instant messaging (IM) services are used by the majority of internet users, with 69% ever having used them and 64% using them at least quarterly. Younger adults aged 16-24 and 25-34 are more likely than all internet users to use IM services, while 55-64s and those aged 65+ are less likely than all internet users to use them. Again, this may reflect a connection between the high proportion of younger adults with smartphones and their use of apps.

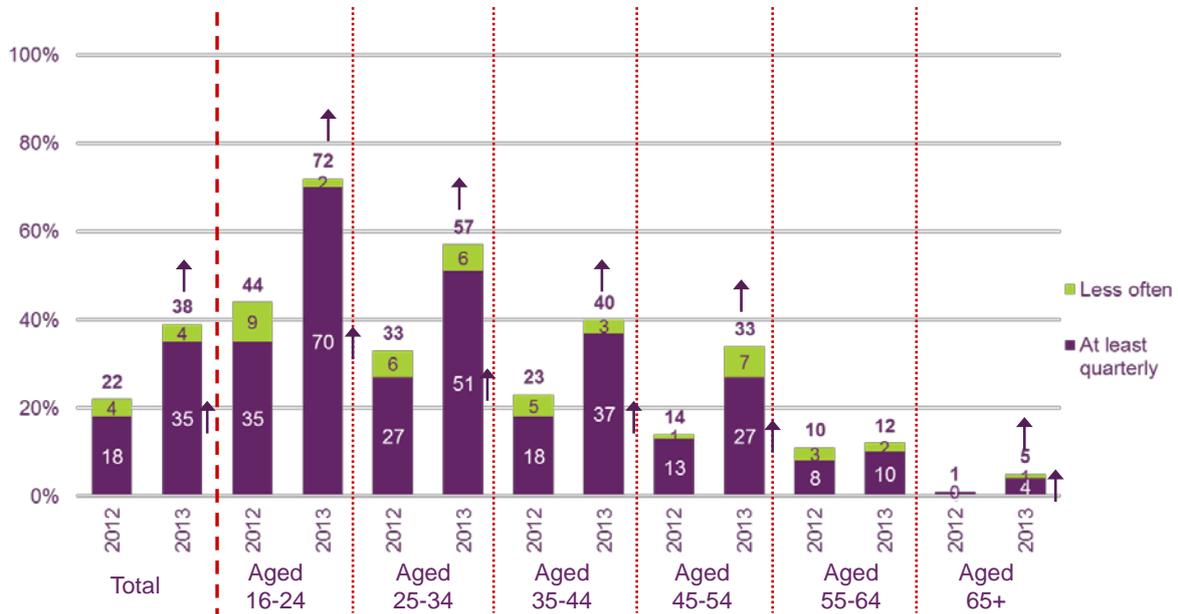
In particular, there has been a significant increase in the number of users who use their phone for IM. Figure 18 below shows that nearly four in ten (38%) mobile users have ever used their phone for IM – an increase of 16 percentage points since 2012⁷. The number of

⁶ The question was amended in 2013 - In 2012 it referred to 'making or receive calls over the internet (as opposed to over your mobile providers network) on services such as Skype'. In 2013 the question referred to 'Making or receiving telephone or video calls over the internet using services like Skype or FaceTime' which could contribute to the increase since 2012.

⁷ The question was amended in 2013 - The question wording in 2011 and 2012 referred to 'use instant messaging (MSN/ Windows Live Messenger, AOL Instant Messenger/ AIM etc.)'. In 2013 it referred to 'use instant messaging such as Apple iMessage, WhatsApp, Facebook Messenger Chat, BlackBerry Messenger/ BBM' which could contribute to the increase shown since 2012

people using IM services on their phone at least quarterly has almost doubled, from 18% in 2012 to 35% in 2013, and has doubled for all age groups from 16 to 54.

Figure 18: Frequency of using instant messaging on a mobile phone, by age: 2012 and 2013



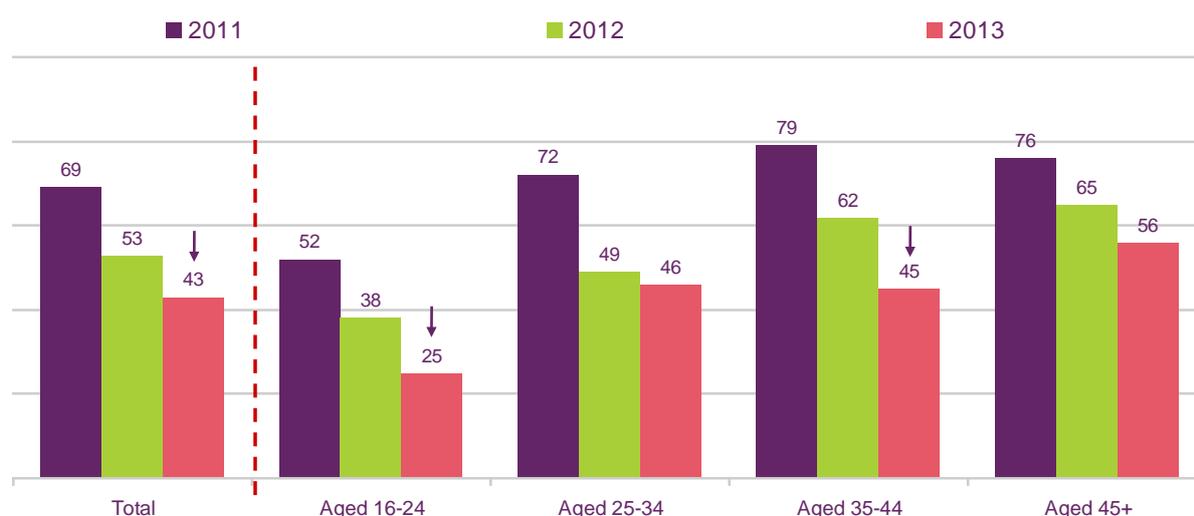
M8R – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded) NB Question wording in 2011 and 2012 referred to ‘use instant messaging (MSN/ Windows Live Messenger, AOL Instant Messenger/ AIM etc.)’ amended in 2013 to refer to ‘use instant messaging such as Apple iMessage, WhatsApp, Facebook MessengerChat, BlackBerry Messenger/ BBM’ which could contribute to the increase shown since 2012. Base: All adults aged 16+ who use a mobile phone (1608 in 2012, 1465 in 2013, 231 aged 16-24 in 2012, 222 aged 16-24 in 2013, 229 aged 25-34 in 2012, 258 aged 25-34 in 2013, 298 aged 35-44 in 2012, 262 aged 35-44 in 2013, 227 aged 45-54 in 2012, 217 aged 45-54 in 2013, 238 aged 55-64 in 2012, 234 aged 55-64 in 2013, 385 aged 65+ in 2012, 272 aged 65+ in 2013) Significance testing shows any change between 2012 and 2013. Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Half of all mobile users regularly use mobiles to visit social networking sites or apps

Two-thirds (66%) of adult internet users say they have a current social networking site profile and this is unchanged since 2012. Having a profile is more likely among those aged under 45 and less likely for those aged 55 and over.

As shown in Figure 19, there is evidence that adults with a current social networking profile are using a wider variety of social media sites and apps, with the incidence of having only a Facebook profile declining from 69% in 2011 to 43% in 2013. This decrease since 2011 is evident across all of the four age groups shown, although in 2013 a decline is evident only among those aged 16-24 and those aged 35-44.

Figure 19: Incidence of having only a Facebook profile: 2011-2013



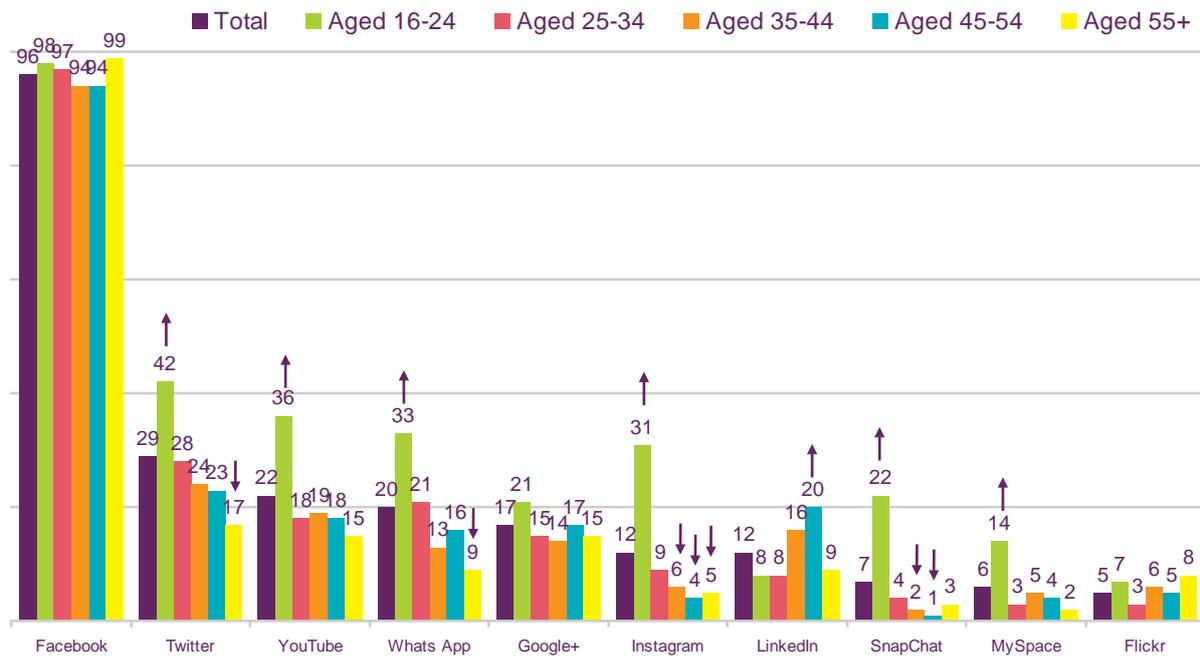
IN24 – Which sites or apps do you have a page or profile on? (prompted responses, multi coded)
 Base: All adults aged 16+ with current social networking site profile (721 aged 16+ in 2011, 784 aged 16+ in 2012, 798 aged 16+ in 2013, 194 aged 16-24 in 2011, 208 aged 16-24 in 2012, 198 aged 16-24 in 2013, 189 aged 25-34 in 2011, 182 aged 25-34 in 2012, 211 aged 25-34 in 2013, 156 aged 35-44 in 2011, 183 aged 35-44 in 2012, 170 aged 35-44 in 2013, 182 aged 45+ in 2011, 211 aged 45+ in 2012, 219 aged 45+ in 2013, .
 Significance testing shows any difference between 2012 and 2013
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Despite this decline in having ‘only’ a Facebook profile, Facebook is still the dominant social media service provider. Nearly all (96%) adults with a current social networking profile have a Facebook profile, and this does not vary by age, as shown in Figure 20 below. In addition, 86% of adults with a current social networking profile consider Facebook to be their main social networking profile, with this more likely among those aged 55+, females and those living in DE households.

The next most common social networking service is Twitter, which is used by three in ten (29%) adults with a current social networking profile. One fifth of adults with a current social networking profile have a profile on YouTube (22%) and WhatsApp (20%). Those aged 16-24 are more likely to have current profiles on six of the top ten (prompted) social networking sites, compared to all users of these sites.

For Instagram and Snapchat, 16-24s are three times more likely than all users to have a profile on these services (31% vs. 12%, and 22% vs. 7% respectively). One in eight with a current social networking site profile (12%) has a profile on the professional network, LinkedIn. This incidence does not vary among 16-24s and 25-34s, but those aged 45-54 are more likely to have a profile on LinkedIn (20% vs. 12% among all users).

Figure 20: Top ten (prompted) social networking sites or apps used by those with a current social networking site profile, by age: 2013



IN24 – Which sites or apps do you have a page or profile on? (prompted responses, multi coded) – showing top ten sites respondents were asked about among adults aged 16+ with an active social networking site profile
 Base: All adults aged 16+ with a current social networking site profile (798 aged 16+, 198 aged 16-24, 211 aged 25-34, 170 aged 35-44, 114 aged 45-54, 105 aged 55+). Significance testing shows any difference by ages shown compared to all adults
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

In terms of differences by gender, females with a current social networking profile are slightly more likely than males to use Facebook (98% vs. 94%). However, males are significantly more likely than females to use Twitter (34% vs. 24%), YouTube (28% vs. 16%) and MySpace (9% vs. 4%).

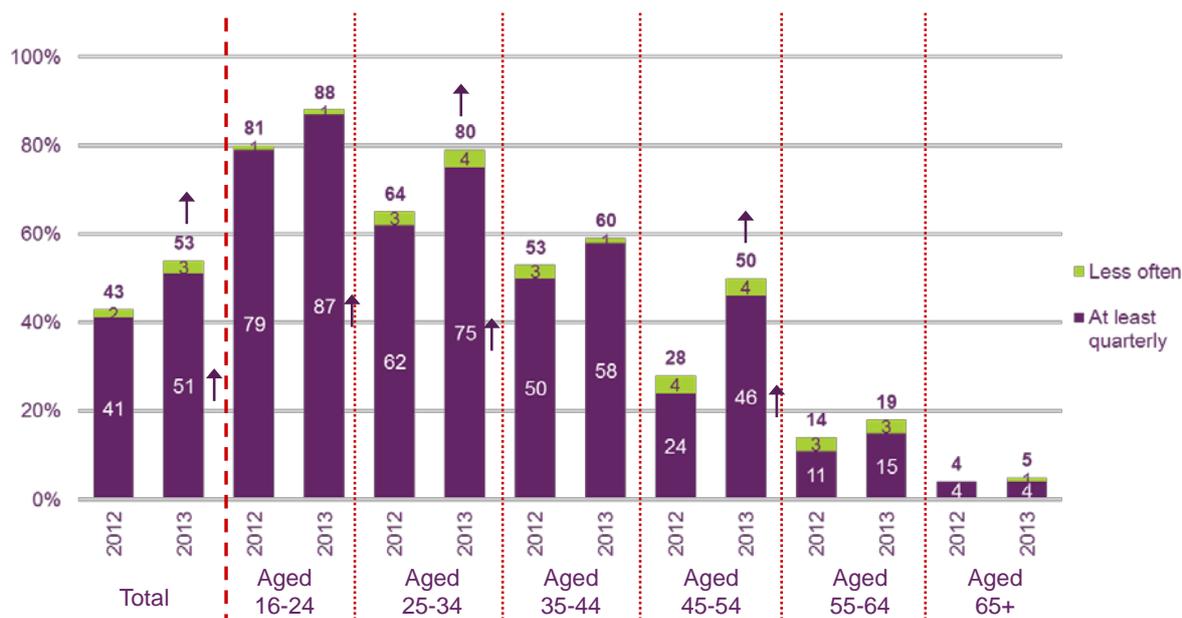
In 2013, those with a current social networking profile have an average of 228 friends/ contacts/ followers on their main social networking site; this is unchanged since 2012. Compared to all adults, those aged 16-24 have a higher average number of friends/ contacts/ followers (355 vs. 228), as do males compared to females (265 vs. 195).

So how active are those with current social networking profiles? Six in ten (60%) adults with a current social networking profile say they visit any of their profiles more than once a day using any type of device. This has increased from 50% in 2012 and is primarily driven by 16-24s (with a 14 percentage point increase since 2012) and 25-34s (with a 12 percentage point increase since 2012).

As shown in Figure 21 below, over half of mobile users (51%) visit social networking sites or apps via mobiles at least quarterly. There has also been a ten percentage point increase since 2012 (from 43% to 53%) in having ever visited social networking sites or apps on a mobile phone, driven by those aged 25-34 and 45-54, with 16pp and 22pp increases respectively. This increase since 2012 is also evident among C1, C2, and DE households, as well as among males and females.

That said, those living in C1 households are much more likely than all mobile users to use their phone for visiting social networking sites or apps, while DEs are less likely to have used their mobile in this way (ever or quarterly).

Figure 21: Frequency of visiting social networking sites or apps on a mobile phone, by age: 2012 and 2013



M8L – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded)
 Base: All adults aged 16+ who use a mobile phone (1608 in 2012, 1465 in 2013, 231 aged 16-24 in 2012, 222 aged 16-24 in 2013, 229 aged 25-34 in 2012, 258 aged 25-34 in 2013, 298 aged 35-44 in 2012, 262 aged 35-44 in 2013, 227 aged 45-54 in 2012, 217 aged 45-54 in 2013, 238 aged 55-64 in 2012, 234 aged 55-64 in 2013, 385 aged 65+ in 2012, 272 aged 65+ in 2013) Significance testing shows any change between 2012 and 2013
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Close to half of those who go online at home and who use social networking sites or apps say their preferred device for social networking is the PC/ laptop/ netbook (47%). This is closely followed by mobile phone/ smartphone (41%), and less than one in ten adults (9%) say their preferred device is a tablet.

However, these results differ significantly by age, with over half of internet users aged 16-24 (57%) and 25-34 (51%) preferring to use a mobile phone. This preference for social networking via mobile phones may help to explain why those aged 16-24 are more likely than all adults with a current profile to visit any of their profiles more than once a day (83% vs. 60%) and twice as likely as all adults to visit any of their profiles more than ten times a day (28% vs. 15%).

Three in ten adults with a current social networking profile have a Twitter account⁸.

Just over one in four (27%) of all internet users have sent/ received Twitter updates and one in five (22%) do so at least quarterly. Both these measures are unchanged since 2012.

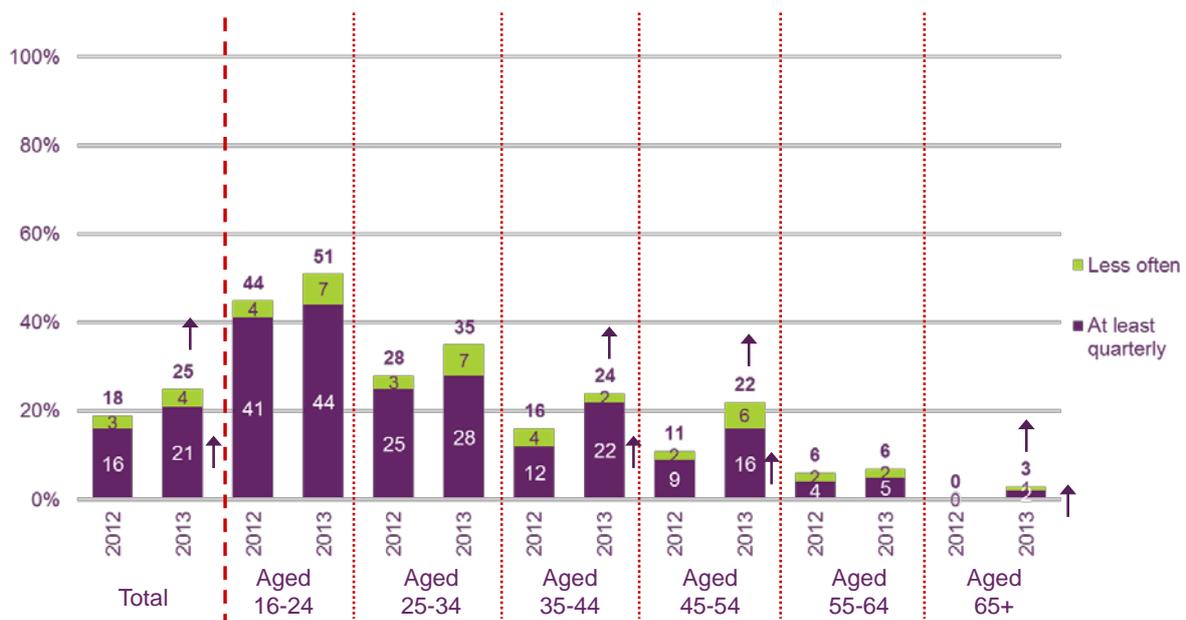
Age appears to be a significant factor in the use of Twitter, with those aged 16-24 almost twice as likely (48%) as all internet users to have ever sent or received Twitter updates (48% vs. 27%) while 55-64s and 65+ are considerably less likely to have ever done so (5% and 8% respectively vs. 27%).

⁸ People that may be inactive users of Twitter or those that only receive rather than post updates may be less inclined to say they have a current profile on Twitter. This may account for the difference in the number of people who say they a current Twitter profile (29%) and the number of people who say they have ever sent or received a Twitter update (27%).

Use of a mobile phone may be linked to use of Twitter; one in four (25%) mobile users have ever sent/ received Twitter updates on a mobile phone, and around one in five (21%) do so at least quarterly.

Figure 22 below shows that since 2012, there has been a seven percentage point increase in ever sending or receiving Twitter updates via a mobile phone, with this increase attributable to an increase among those aged 35-44, 45-54 and to a lesser extent among those aged 65+. This increase since 2012 is also driven by increases in C1 households (32% vs. 21% in 2012), C2 households (22% vs. 14% in 2012), males (26% vs. 20% in 2012) and females (23% vs. 17% in 2012).

Figure 22: Frequency of sending or receiving Twitter updates on a mobile phone, by age: 2012 and 2013



On average, those with a Twitter profile say they follow 146 people/ organisations and have 97 followers.

The majority of those with a Twitter profile use it for following, or being followed by, 'friends' (72%). Slightly less than half (45%) use it for celebrities (45%) or news (45%). One in four (23%) use it to search for information. Females are more likely than males to use Twitter to follow celebrities (53% vs. 37%) while the opposite is true for sports news, with 47% of males using it for that purpose compared to 27% of females.

The vast majority of Twitter users (81%) say that they use it for reading tweets from people or organisations that they follow, while a large minority say they use it to read tweets from a range of people based on a topic they are interested in, or as a live news feed to keep up with current events (46% and 40% respectively).

Using a mobile to text or phone is the preferred way to arrange to meet a friend

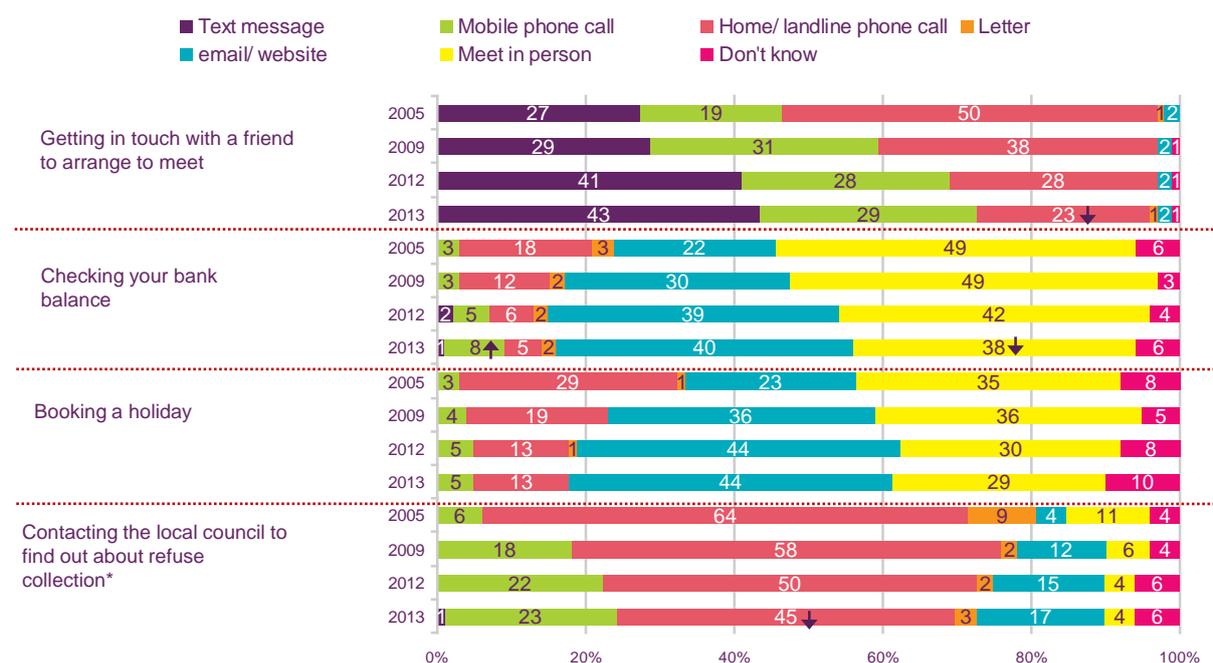
Since 2005 we have been asking respondents about their preferred method of contacting other people for various purposes. As illustrated in Figure 23 below, in 2013, the most popular way to get in touch with a friend to arrange to meet is to send a text message. As was the case in 2012, four in ten adults would prefer to do this. Since 2012 they are less likely to say that they prefer to use the home landline for this activity (23% vs. 28% in 2012).

While going online and meeting in person are still the preferred methods for checking a bank balance, meeting in person is now less likely to be nominated than in 2012 (38% vs. 42%).

Although less than one in ten adults (8%) prefer to use a mobile phone to check their bank balance, this method is now more likely to be nominated than in 2012 (8% vs. 5%)

As in 2012, going online is still the most preferred way to book a holiday, followed by meeting in person. The preferred way to contact the local council continues to be by home/landline phone call, although this is less likely to be nominated than in 2012 (45% vs. 50% in 2012).

Figure 23: Preferred communication method for making contact: 2005, 2009, 2012 and 2013

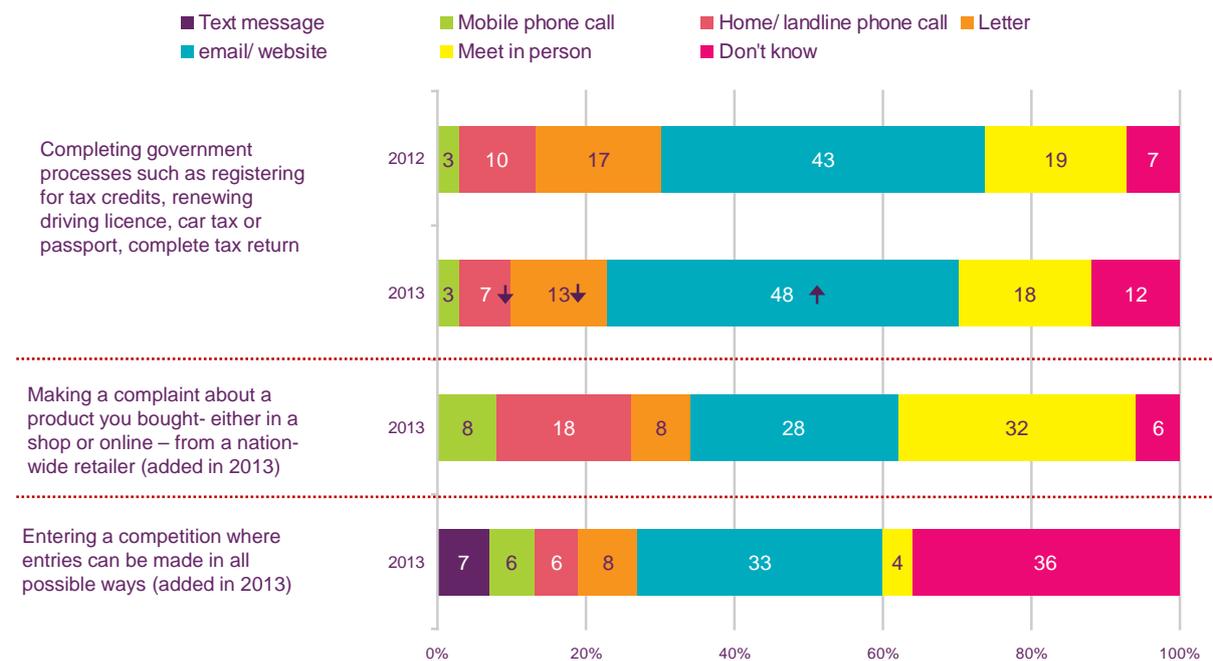


Z1A-D. Please use this list to say which one way you would prefer to make contact for a few different reasons that I'll read out. (Prompted responses, single coded) *2005 wording was 'Contacting the local council'. Base: All adults aged 16+ (3244 in 2005, 1012 in 2009, 1805 in 2012, 1642 in 2013). Significance testing shows any change between 2012 and 2013 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

As shown in Figure 24 below, almost half of people prefer to complete government processes online (via email/website), representing an increase of five percentage points since 2012. This makes it the most preferred option for this activity. Meeting in person, the next most preferred option, was nominated by close to one in five (18%).

Around three in ten would prefer to make a complaint in person (32%) or online (28%) about a product they had purchased.

Figure 24: Preferred communication method for making contact: 2012 and 2013



Z1E-G. Please use this list to say which one way you would prefer to make contact for a few different reasons that I'll read out. (Prompted responses, single coded) Base: All adults aged 16+ (3244 in 2005, 1012 in 2009, 1805 in 2012, 1642 in 2013). Significance testing shows any change between 2012 and 2013
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

4.7 Online transactions

Two other sets of activities undertaken by the majority of internet users at least quarterly are buying things online (66%), and banking and paying bills online (61%). Effective online transactions are dependent on a range of media literacy skills, such as being able to use the technology, and evaluating the cost benefits and risks of using the service. As such, we have measured levels of online banking since 2005, and buying and selling things online since 2009. This section looks at the frequency and the preferred device for carrying out these activities.

Three in four internet users mostly use a PC/laptop/ netbook when buying things online

The majority of internet users (84%) have ever bought something online, with two in three (66%) doing so at least quarterly. However, this activity is less likely to have ever been undertaken by those aged 55-64 and 65+, and those living in DE households.

Three in four (76%) internet users who have ever bought things online say they mostly use a PC/laptop/ netbook when buying online. One in ten mostly use a mobile/ smartphone (11%) or a tablet (10%).

Compared to all users, those aged 16-24 and 25-34 are more likely to mostly use a smartphone (24% and 18% respectively vs. 11% for all) while those aged 45-54 and 55+ are more likely to use a PC/ laptop/ netbook to buy things online (88% and 89% respectively vs. 76% for all).

Less than four in ten internet users sell things online

In contrast to buying, selling things online is undertaken by a minority (38%) of internet users with less than a quarter (22%) doing so at least quarterly.

Compared to all adults, having ever sold things online is more likely for 25-34s (50% vs. 38% for all) and less likely for 55-64s (23% vs. 38% for all) and those aged 65+ (13% vs. 38% for all). As shown in Figure 25 below, this activity is less likely among females than among males (35% vs. 43%).

Figure 25: Frequency of selling things online: 2013⁹



IN17D– Please think about going online on any type of computer, on a mobile phone, on a games player or on a media player. From this list please tell me the types of things you currently do online and how often you do each? (Prompted responses, single coded)

Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 219 aged 16-24, 254 aged 25-34, 243 aged 35-44, 201 aged 45-54, 192 aged 55-64, 163 aged 65+, 325 AB, 407 C1, 242 C2, 298 DE, 613 males, 659 females) Significance testing shows any difference between any age group or socio-economic group and all adults and between males and females.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Seven in ten internet users mostly use a PC/laptop/ netbook for online banking

Compared to 2012, there has been no change in frequency of banking or paying bills online with two in three (67%) internet users having ever done so and the vast majority (61%) doing so at least quarterly.

Seven in ten (69%) of internet users who have ever banked or paid bills online mainly use a PC/ laptop/ netbook when banking online, while one in five (19%) mainly use a mobile/ smartphone. One in ten prefer to use a tablet (9%).

Similar to the findings for online transactions, those aged 45-54 (87%), those aged 55+ (89%) and those living in AB households (77%) mostly use a PC/laptop/ netbook for banking online, while those aged 16-24 and 25-34 are more likely than all adults to do this mainly through a mobile/ smartphone (39% and 28% respectively vs. 19%).

⁹ The question was amended in 2013. In previous surveys, buying and selling online was measured as one activity with 82% of internet users saying they had ever done this.

One third of mobile users buy things online using their phone

As shown in Figure 26 below, there has been a significant increase in mobile users saying they have ever bought things on websites or apps using their phone. One third (33%) now say they have ever done this, an increase of ten percentage points since 2012, with one in four (24%) doing so at least quarterly – up from 18% in 2012. This increase in ever having bought things online via a phone is a result of increases across almost all age groups, with a doubling of the incidence among the 45-54 age group; from 15% to 29% in 2013.

Increases were also evident among those living in C1 households (43% vs. 24% in 2012), C2 households (35% vs. 22% in 2012), males (34% vs. 25% in 2012) and females (32% vs. 21% in 2012).

Figure 26: Frequency of buying things from websites or apps using a mobile phone, by age: 2012 and 2013



M8V – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded)

Base: All adults aged 16+ who use a mobile phone (1608 in 2012, 1465 in 2013, 231 aged 16-24 in 2012, 222 aged 16-24 in 2013, 229 aged 25-34 in 2012, 258 aged 25-34 in 2013, 298 aged 35-44 in 2012, 262 aged 35-44 in 2013, 227 aged 45-54 in 2012, 217 aged 45-54 in 2013, 238 aged 55-64 in 2012, 234 aged 55-64 in 2013, 385 aged 65+ in 2012, 272 aged 65+ in 2013) Significance testing shows any change between 2012 and 2013

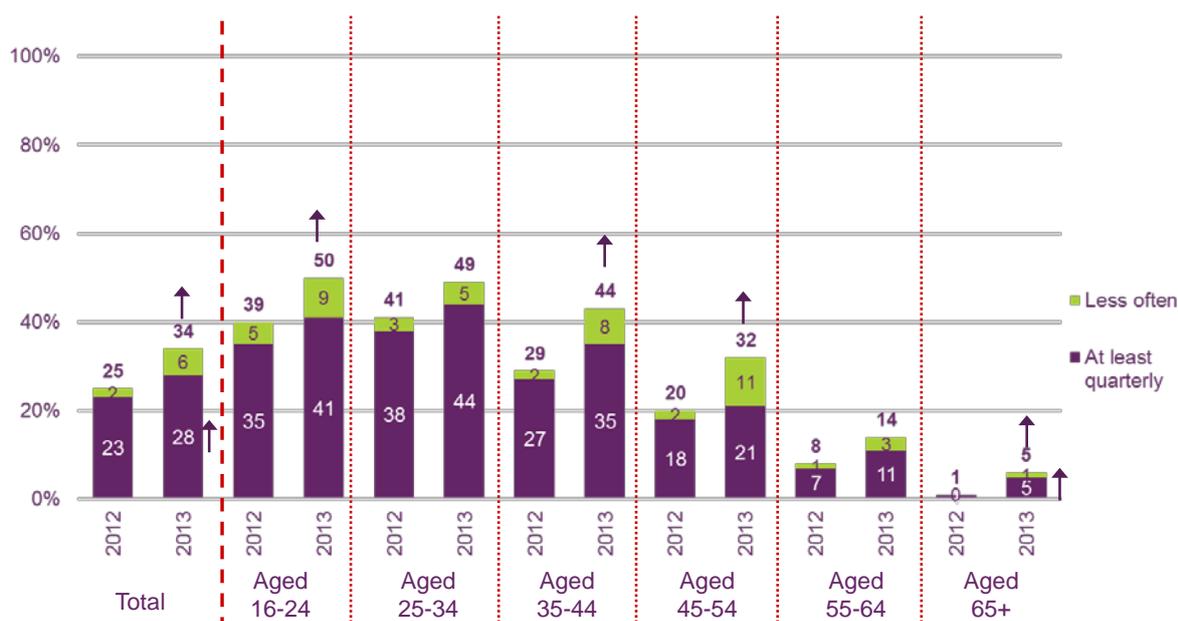
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

There have been similar increases in the incidence of mobile users checking their bank balance on mobile phones. One in three (34%) mobile phone users have ever checked a bank balance on their mobile phone, with more than one in four (28%) doing so at least quarterly.

As shown in Figure 27 below, this represents a significant increase of nine percentage points overall and five percentage points for the quarterly measure, compared to 2012. This increase since 2012 in ever using a mobile phone for this purpose is driven by increases among those aged 16-24, 35-44, 45-54 and 65+, while the quarterly increase is attributable to those aged 65+, those living in C1 and C2 households, and females.

In 2013, 16-24s, 25-34s and 35-44s are more likely than all mobile users to have ever done this activity on a mobile phone and to have done it at least quarterly, while 55-64s and over-65s are less likely (ever, or quarterly).

Figure 27: Frequency of checking a bank balance on a mobile phone, by age: 2012 and 2013



M8T – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded)

Base: All adults aged 16+ who use a mobile phone (1608 in 2012, 1465 in 2013, 231 aged 16-24 in 2012, 222 aged 16-24 in 2013, 229 aged 25-34 in 2012, 258 aged 25-34 in 2013, 298 aged 35-44 in 2012, 262 aged 35-44 in 2013, 227 aged 45-54 in 2012, 217 aged 45-54 in 2013, 238 aged 55-64 in 2012, 234 aged 55-64 in 2013, 385 aged 65+ in 2012, 272 aged 65+ in 2013) Significance testing shows any change between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

4.8 Practical/ administrative activities

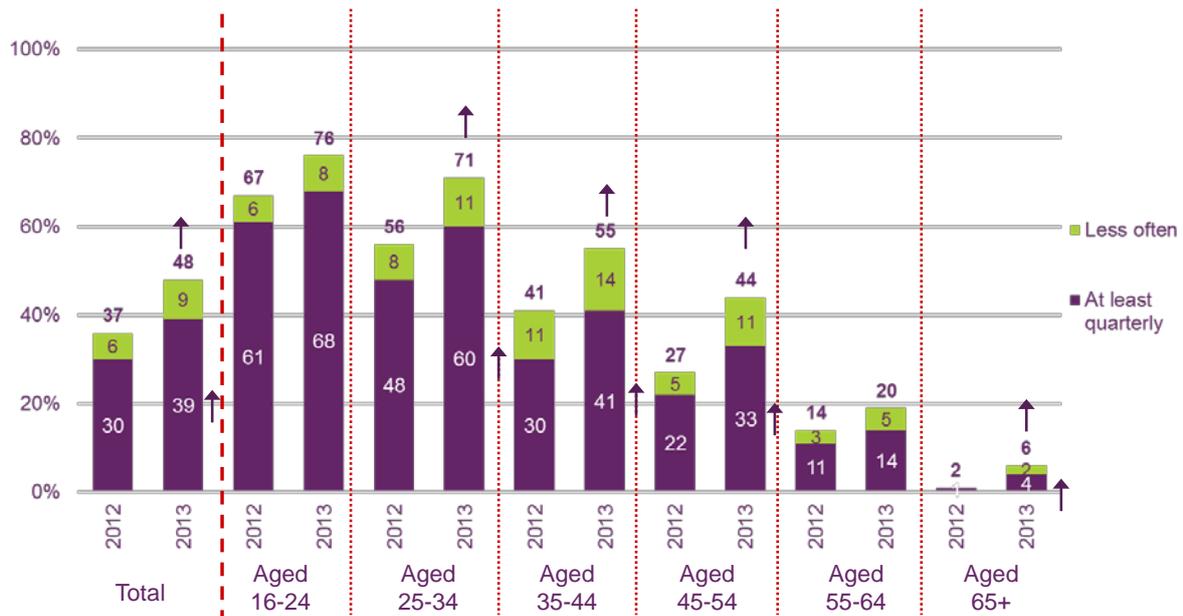
A range of other practical and administrative activities are carried out online by many internet users, such as downloading software, looking for jobs, or information about jobs, filling in forms and applications, and doing courses.

More than half of internet users have downloaded software and just under half of mobile users have downloaded apps

As was the case in 2012, more than half (55%) of internet users have ever downloaded software, with one in three (33%) doing so at least quarterly. Those aged 16-24 and 25-34 are more likely to have ever downloaded software and to do so at least quarterly, as are males compared to females.

While there has been no increase in the incidence of downloading software, since 2012 there have been increases in the incidence of mobile phone users downloading apps on their mobile phone. As shown in Figure 28 below, in 2013 almost half (48%) of mobile users have ever downloaded apps, and four in ten (39%) do this at least quarterly. This represents an 11 percentage point and a nine percentage point increase respectively, compared to 2012. These increases are attributable to those aged 25-34, 35-44, 45-54 and over-65s being more likely to have downloaded apps (ever and quarterly) as well as those living in C1 and C2 households. Both males and females are also more likely to have done this compared to 2012.

Figure 28: Frequency of downloading apps (inc. games) on a mobile phone, by age: 2012 and 2013



M8U – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded)
 Base: All adults aged 16+ who use a mobile phone (1608 in 2012, 1465 in 2013, 231 aged 16-24 in 2012, 222 aged 16-24 in 2013, 229 aged 25-34 in 2012, 258 aged 25-34 in 2013, 298 aged 35-44 in 2012, 262 aged 35-44 in 2013, 227 aged 45-54 in 2012, 217 aged 45-54 in 2013, 238 aged 55-64 in 2012, 234 aged 55-64 in 2013, 385 aged 65+ in 2012, 272 aged 65+ in 2013) Significance testing shows any change between 2012 and 2013
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

One in six internet users have received a qualification from an online course

In 2013, one in six internet users (17%) had ever completed an online course to achieve a qualification, with one in ten (9%) doing so at least quarterly; these measures have not changed since 2011 or 2012.

Half of internet users have looked for jobs online

Half of internet users (49%) say they have ever looked at job opportunities online, with three in ten (29%) doing so at least quarterly. Compared to 2012, internet users are now less likely to undertake this activity at least quarterly (29% vs. 34% in 2012). This decrease in the quarterly measure since 2012 is also evident among those aged 55-64 (8% vs. 17% in 2012), for males (29% vs. 38% in 2012) and those living in DE households (26% vs. 39% in 2012).

In 2013, looking for job opportunities online is more likely to be undertaken by younger age groups, with 69% of 16-24s and 66% of 25-34s having ever done so.

Six in ten internet users have filled out forms and applications online

In 2013, we asked internet users about their experience of filling out forms and applications online. As shown in Figure 29 below, six in ten (61%) internet users have ever filled out a form or application online, with one in three (32%) doing so at least quarterly. Those aged 35-44 are more likely to have ever done this (71% vs. 61% for all) while those aged 16-24 are more likely to do it at least quarterly (41% vs. 32% for all). Compared to all adults, those

aged 65+ are less likely to have ever done this (34%) or to do it at least quarterly (14%), while 55-64s are less likely to do this at least quarterly (22%).

Figure 29: Frequency of filling in a form or application online, by demography: 2013



IN18Q— Please think about going online on any type of computer, on a mobile phone, on a games player or on a media player. From this list please tell me the types of things you currently do online and how often you do each? (Prompted responses, single coded)

Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 219 aged 16-24, 254 aged 25-34, 243 aged 35-44, 201 aged 45-54, 192 aged 55-64, 163 aged 65+, 325 AB, 407 C1, 242 C2, 298 DE, 613 males, 659 females) Significance testing shows any difference between any age group or socio-economic group and all adults and between males and females.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

4.9 Watching audio-visual content online and on mobiles

Watching video online, either short clips from sites like YouTube or Facebook, or longer clips from TV broadcasters' websites, is done regularly by a large minority of internet users. This section looks at the incidence of watching video online across different devices and explores the impact of age on this activity.

Just under half of mobile phone users have ever visited sites/ apps like YouTube or Vine to look at video/ clips on their phones

In 2013, around six in ten (62%) internet users ever watched online/ download short video clips such as music videos or comedy clips (e.g. on YouTube) and half (48%) did this at least quarterly.

Just over half of internet users have ever downloaded or watched content (TV programmes or films) from broadcasters' websites (54%) with four in ten (40%) doing so at least quarterly.

For both of these online activities, there has been no change since 2012 among all adult internet users, either for the overall measure or for having undertaken these activities at least quarterly.

The age variation for both of these online activities highlights that they are currently more of a youthful activity, with 85% of 16-24s ever watching short clips, compared to 26% of those aged 65+. The age differences for watching content from broadcasters' websites are also

considerable. Seven in ten internet users aged 16-24 have ever done this (71%) compared to one in three internet users aged 65+ (32%).

In 2013, gender also played a role, with males significantly more likely than females to have ever undertaken either of these activities (66% vs. 57% for watching short clips online and 58% vs. 51% respectively).

Six in ten (62%) internet users who said they had ever downloaded content from broadcasters' websites said their preferred device for this activity was the PC/ laptop/ netbook, with the next most-preferred device being the tablet PC (15%). Less than one in ten prefer their mobile phone/ smartphone (8%). Continuing the trend mentioned earlier, 16-24s are twice as likely as all adults to nominate their mobile phone/ smartphone as their preferred device (16% vs. 8%) while those aged 45 and over are less likely to prefer their mobile phone (2% vs. 8%).

The frequency of watching TV programmes on a mobile phone has not changed significantly since 2012, with one in five mobile phone users (22%) having ever watched a TV programme on a mobile phone, and one in eight (13%) doing so at least quarterly. Given the popularity of smartphones among 16-24s and 25-34s, it is unsurprising that they are more likely than all mobile users to have ever watched TV programmes in this way. Males are more likely than females to have ever watched a TV programme on a mobile phone (26% vs. 18%).

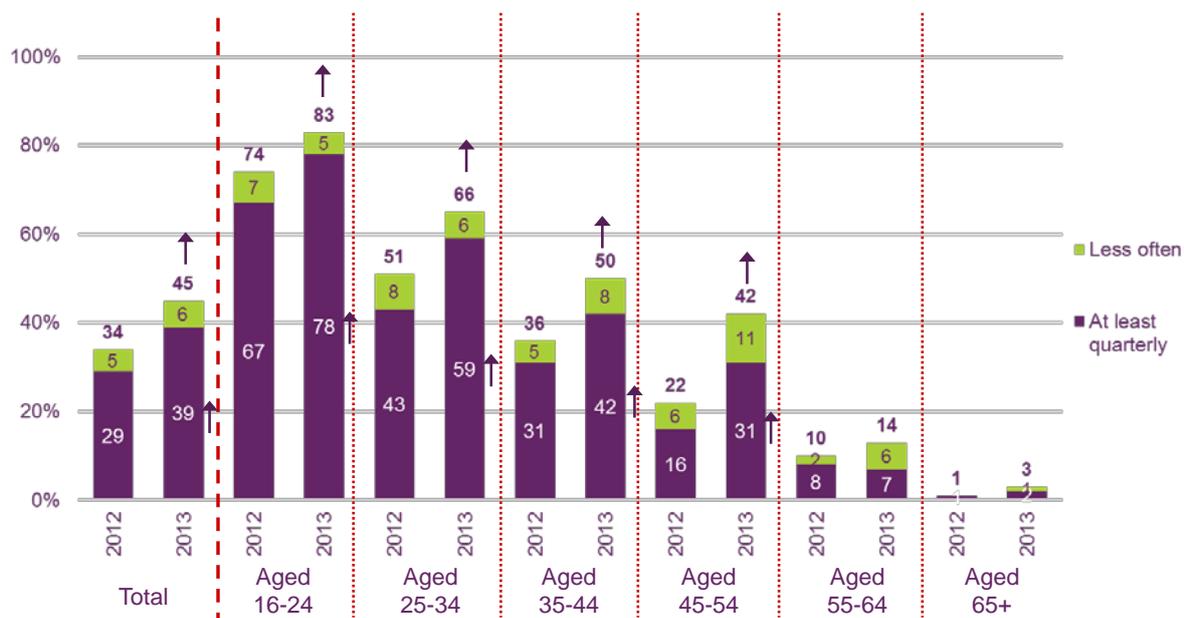
While the frequency of watching TV programmes on a mobile phone may not have changed since 2012, the frequency of using mobile phones to visit sites/ apps like YouTube or Vine to look at video/ clips posted by other people has changed significantly¹⁰. In 2013, almost half (45%) of mobile phone users had ever done this, an increase of nine percentage points since 2012 (from 34%). In 2013, four in ten (39%) mobile users did this quarterly; also up by ten percentage points.

As we see in Figure 30 below, this increase since 2012 is attributable to 16-24s, 25-34s, 35-44s and 45-54s all being more likely to use their phone to access this type of content. Compared to last year, 45-54s are now twice as likely to say they use their mobile phone at least quarterly in this way (31% vs. 16%). This increase since 2012 for both measures (ever and quarterly) is also attributable to those in C1 and C2 households, and among males and females.

In 2013, and as seen previously, 16-24s and 25-34s are more likely than all mobile users to have ever done this, and to have done it at least quarterly.

¹⁰ In 2013 the wording of this specific question was amended to include references to apps as well as websites and also to include Vine as well as YouTube, which could contribute to the increases shown since 2012.

Figure 30: Frequency of visiting sites or apps like YouTube or Vine to look at videos or clips posted by other people, on a mobile phone, by age: 2012-2013



M8M – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded) – NB in 2013 the wording of this specific question was amended to include references to apps as well as websites and also to include Vine as well as YouTube, which could contribute to the increases shown since 2012

Base: All adults aged 16+ who use a mobile phone (1608 in 2012, 1465 in 2013, 231 aged 16-24 in 2012, 222 aged 16-24 in 2013, 229 aged 25-34 in 2012, 258 aged 25-34 in 2013, 298 aged 35-44 in 2012, 262 aged 35-44 in 2013, 227 aged 45-54 in 2012, 217 aged 45-54 in 2013, 238 aged 55-64 in 2012, 234 aged 55-64 in 2013, 385 aged 65+ in 2012, 272 aged 65+ in 2013) Significance testing shows any change between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

4.10 Public and civic activities

Internet users can undertake a range of civic, official and governmental processes online. This section looks at the frequency of these activities, the reasons for doing so online and the devices mainly used to do so.

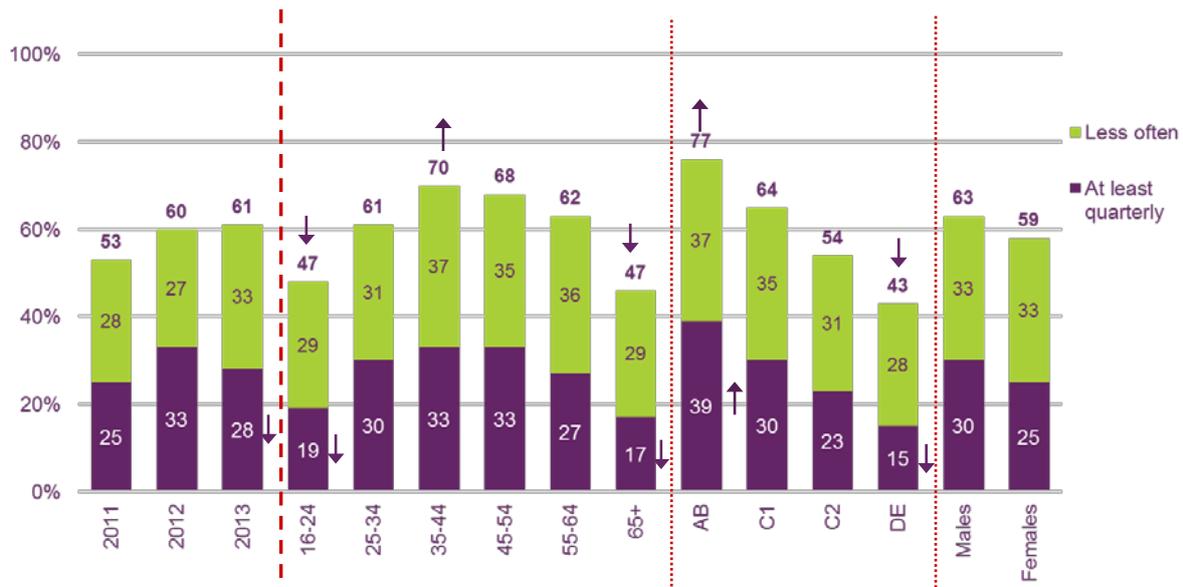
There is no change at an overall level in the frequency of completing government processes online

As shown in Figure 24 above the most preferred way of completing government processes for almost half of people is online (via email/website) and represents an increase of five percentage points since 2012.

While Figure 31 below shows no change at an overall level in the frequency of completing government processes online since 2012, there has been a decrease since 2012 in the frequency of doing so at least quarterly.

This decrease in the quarterly measure among all internet users (from 33% in 2012 to 28% in 2013) is attributable to a decrease among 25-34s (from 41% in 2012 to 30% in 2013) as well as among those living in C2 households (from 36% to 23%) and females (from 31% to 25%).

Figure 31: Frequency of completing government processes online: 2011, 2012, 2013



IN170 – Please think about going online on any type of computer, on a mobile phone, on a games player or on a media player. From this list please tell me the types of things you currently do online and how often you do each? (Prompted responses, single coded)

Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 219 aged 16-24, 254 aged 25-34, 243 aged 35-44, 201 aged 45-54, 192 aged 55-64, 163 aged 65+, 325 AB, 407 C1, 242 C2, 298 DE, 613 males, 659 females) Significance testing shows any difference between any age group or socio-economic group and all adults and between males and females

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Similarly, as mentioned earlier in this report, ever going online to find information about public services provided by local or national government has also decreased by four percentage points since 2012 (70% vs. 74% in 2012).

Respondents were asked about their reasons for completing government processes online. Convenience is the most popular reason for ever having completed government processes

online. Four in ten (40%) said that it was quicker than doing these things in person while less than two in ten (18%) gave ease of use as a reason.

Lack of a perceived need (25%), or a preference for speaking to someone in person, either face to face or by phone (20%) are the top two reasons for not completing government processes online. One in eight (13%) internet users who haven't completed processes online say it is because they were unaware that it was possible.

The majority (83%) of internet users who have ever completed government processes online prefer to use a PC/ laptop/ netbook, with this preference more likely among those aged 45+ and less likely for those aged 25-34.

Around one in ten mostly use a tablet (9%). Less than one in ten (4%) mostly use a smartphone for completing government processes online.

More than half (56%) of internet users have ever looked at websites for news about events in their local community, although this is lower than in 2012 (61%). The decrease is driven by those aged 45-54, those living in AB households and males. One in three (32%) internet users do this at least quarterly – also lower than in 2012 (41%), and attributable to a decrease among those aged 16-24 (38% vs. 28% in 2013) and 25-34 (46% vs. 32% in 2013).

Since 2012 there has been no change in ever going online to look at political or campaign issues websites (29%), to sign an online petition (19%), or to contact a local councillor or an MP (13%).

4.11 Listening online and on mobiles

People can listen to a wide range of audio material online, from internet talk radio to streamed music. This section provides some insight into the incidence of listening to radio online, and streamed or downloaded music online and on mobile phones.

One in three internet users have ever listened to radio stations online

In 2013, one in three (32%) internet users had ever listened to radio stations online, with one in five (21%) doing this at least quarterly. These measures have not changed since 2012. Younger adults, aged 16-24, are more likely than all adults to say they have ever listened to radio online (41% vs. 32%), while 55-64s and those aged 65+ are less likely to have done so (22% and 18% respectively). This is likely to be linked to the use of mobile phones by 16-24s.

Half of internet users have ever listened to or downloaded music online (52%), with four in ten (39%) saying they do this at least quarterly. The incidence of ever having undertaken this activity is unchanged since 2012, although the frequency of this activity (on a quarterly basis) has decreased from 44% in 2012 to 39% in 2013.

In 2013, age differences are evident in listening to or downloading music online, ranging from 80% of 16-24s (28 percentage points higher than all adults) to 14% of over-65s (38 percentage points lower than the all-adult measure).

Regarding listening to music on a mobile phone, close to half (48%) of mobile phone users say they have done this, with most doing so at least quarterly (41%). 'Ever' listening to music on a mobile phone is more common for 16-24s (84%) and 25-34s (72%) and less common for 55-64s (17%) and for those aged 65+ (9%).

4.12 Creating / publishing

As forms of content creation develop, with some activities maturing and some just emerging, it is important to monitor the extent to which internet users are involved with, and interested in, various types of activity. We ask internet users about their interest in, and experience of, a variety of online activities, including uploading content onto a website, creating web pages, creating social networking profiles or blogs, and contributing to existing sites or blogs.

Four in ten internet users have uploaded or shared photos to a website or app

Close to four in ten (37%) internet users say they have uploaded or shared photos to a website or app, and around one quarter (23%) say they have ever contributed comments to someone else's blog. One in six (16%) internet users have uploaded a video that they have made to a website like YouTube.

One in eight (13%) internet users have set up their own website and less than one in ten have set up their own blog (7%) or contributed content to a collaborative website such as Wikipedia.

As was the case in 2012, a quarter of internet users have ever maintained a website or blog (24%) with one in six (16%) doing this at least quarterly¹¹.

In 2013, internet users aged 16-24 are more likely than all internet users to have participated in content creation activities such as uploading and sharing photos, contributing to or setting up a blog, taking and uploading videos to sites like YouTube, or adding content to a site like Wikipedia. In contrast, those aged 45 and over are less likely to have uploaded or shared photos.

Those aged 55 and over and those in DE households are less likely to have ever contributed comments to another person's blog or contributed to a collaborative website such as Wikipedia.

Males are more likely than females to have contributed to a collaborative website such as Wikipedia, or to have made a short video and uploaded it to a website like YouTube.

Those aged 55 and over are less likely to have made a short video and uploaded it to a website like YouTube or set up their own blog.

Since 2012, twice as many mobile users have ever put photos or videos on sites like YouTube, Facebook or Instagram for others to see

As was the case in 2012, three-quarters (75%) of mobile phone users have ever taken photos on a mobile, with the majority doing this at least quarterly (67%). In 2013, compared to all adult mobile users, this activity was more likely for 16-24s, 25-34s and 35-44s, and less likely for 55-64s and those aged 65+.

Regarding taking videos on a mobile phone, there is no change since 2012, with around half (54%) of mobile phone users ever having taken videos on a mobile, and the majority of these doing this at least quarterly (41%). Once again, this activity is more likely to be undertaken by younger adults, especially those aged 16-24 and 25-34.

Where we do see a change since 2012, it is in the frequency of using mobile phones to put photos or videos on sites like YouTube, Facebook or Instagram for others to see¹². As

¹¹ Maintaining a website does not necessarily mean that the respondent will have set up the website.

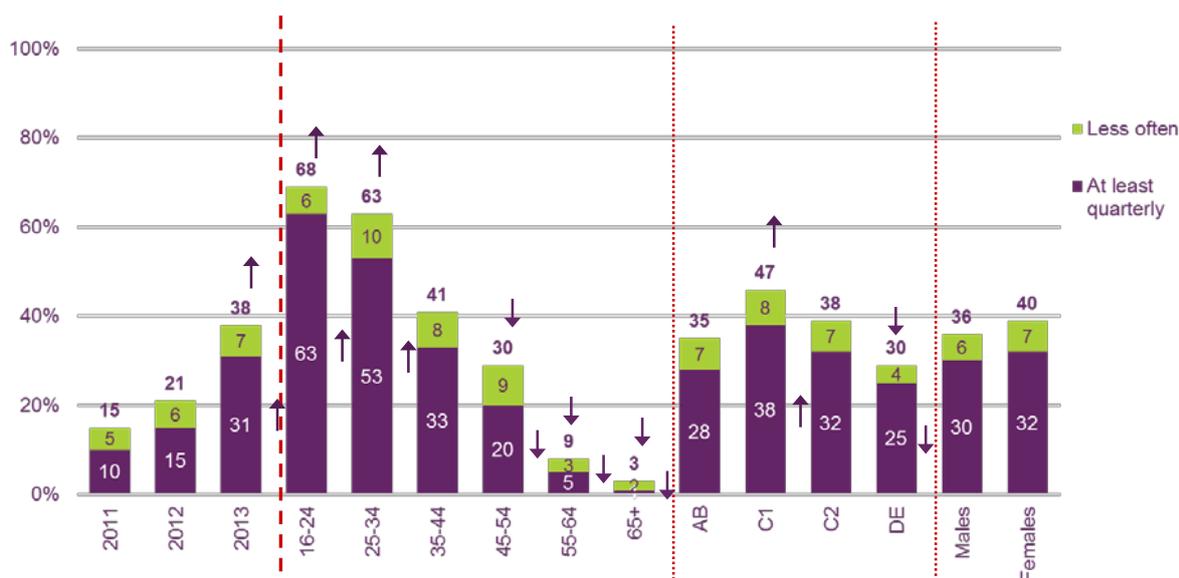
shown in Figure 32 below, in 2013, four in ten (38%) mobile phone users had ever undertaken this activity. This is an increase of 17 percentage points (from 21% in 2012) and means the number of mobile users who do this at least quarterly has doubled since 2012 (from 15% to 31%).

'Ever' using a mobile to put pictures and videos on sites like YouTube, Facebook and Instagram is more likely for 16-24s and 25-34s than for all adults (68% and 63% respectively vs. 38%).

However, increases since 2012 are evident across all ages: 16-24s (68% vs. 47% in 2012), 25-34s (63% vs. 32% in 2012), 35-44 (41% vs. 23% in 2012) and 45-54s (30% vs. 12% in 2012).

The increase since 2012 in using a mobile to put photos or videos on websites is evident for each socio-economic group and for both males and females. The greatest percentage point increase since 2012 is among C1s (47% in 2013 vs. 21% in 2012).

Figure 32: Frequency of using a mobile phone to put photos or videos on sites like YouTube, Facebook or Instagram for others to see, by age and demography: 2011-2013



M8N – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded) NB Question wording in 2011 and 2012 referred to 'sites like YouTube or Bebo', amended in 2013 to refer to 'sites like YouTube, Facebook or Instagram' which could contribute to the increase shown since 2012. Base: All adults aged 16+ who use a mobile phone (1647 in 2011, 1608 in 2012, 1465 in 2013, 222 aged 16-24, 258 aged 25-34, 262 aged 35-44, 217 aged 45-54, 234 aged 55-64, 272 aged 65+, 340 AB, 438 C1, 298 C2, 389 DE, 706 males, 759 females) Significance testing shows any change between 2012 and 2013, any difference between any age group or socio-economic group and all adults and between males and females.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

¹² The question was amended in 2013 – in 2011 and 2012 it asked how often mobile phone users 'put photos or videos on sites like YouTube or Bebo for others to see'. In 2013 it asked about 'putting photos or videos on sites like YouTube, Facebook or Instagram for others to see' which could contribute to the increase seen since 2012.

Half of internet users have ever shared links to websites or online articles

Two in five (38%) internet users share links to websites or online articles at least quarterly, with half (49%) having ever done this. Continuing with the trend demonstrated across all of the other online activities, this is more likely to be done (ever and quarterly) by 16-24s and less likely to be undertaken (ever and quarterly) by those aged 55-64 and those aged 65+. Those in DE households are less likely to have ever done this.

4.13 General entertainment/ games

Media technology has long been associated with entertainment, and this section considers how adults use different devices for entertainment purposes; particularly playing online games.

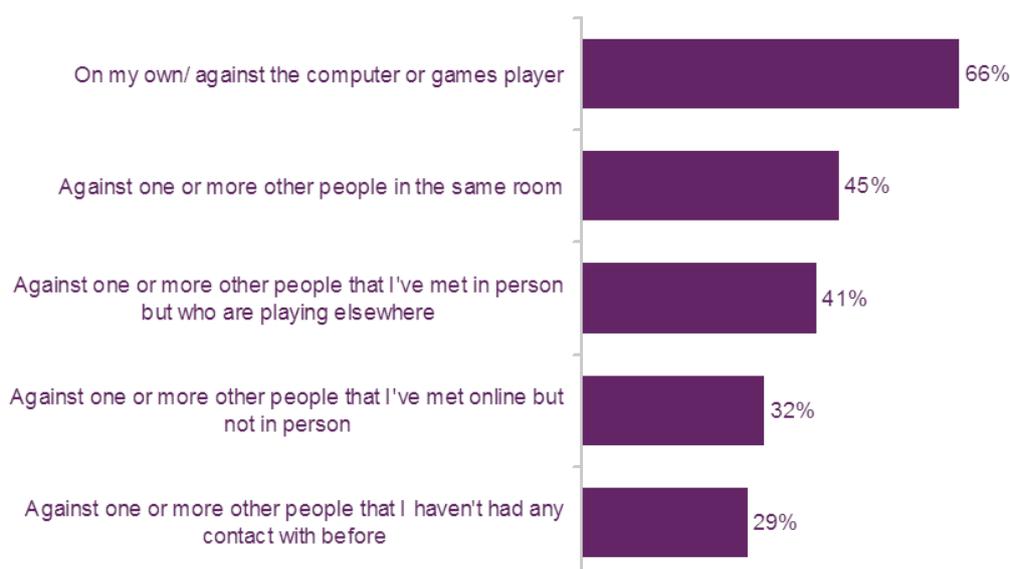
Four in ten internet users regularly play games online

There is no change since 2012 in the proportion of internet users ever going online to play games (39%), but the figure has increased since 2011, when one in three ever went online to do this (32%). There has been no change in the quarterly measure since 2012, but an increase since 2011 (30% in 2013 vs. 23% in 2011).

In 2013, those aged 16-24 (62%) and 25-34 (51%) are more likely, compared to all adults, to play games online (39%), with a marked decrease in gaming among those aged 35-44 (32%). One in five (20%) of those aged 65+ ever play games online. The higher incidence of playing games online by younger age groups may reflect their preference for mobile devices, or shifting priorities linking to life stages.

In 2013, two-thirds (66%) of all adults who play single or multiplayer games online said they played against the games device/software, while 45% had ever played against someone else in the same room as them. Four in ten play against people known to them that are playing elsewhere. As shown in Figure 33 below, similar proportions, around three in ten, play against people that they're friendly with online but have not met in person (32%) or people they've never met at all/ had no previous contact with (29%).

Figure 33: Types of online game playing undertaken by adults: 2013



G5 – When you play games at home over the internet, which of these describes how you play?(prompted responses, multi coded)

Base: Those who ever play single or multiplayer games online (269)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

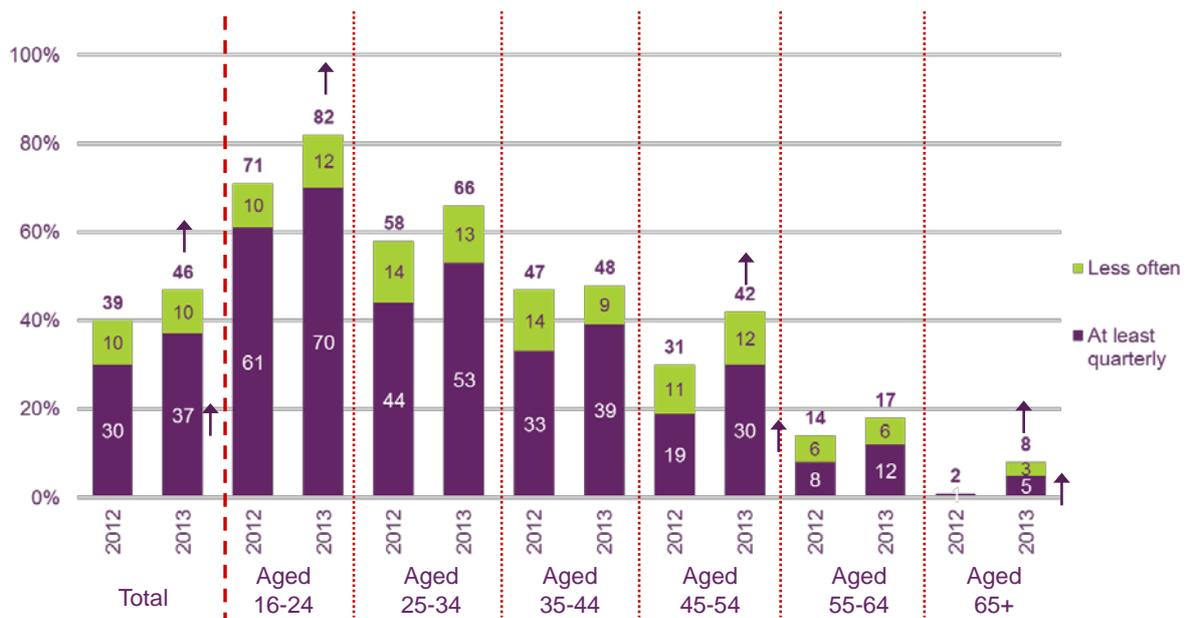
More mobile users are playing games on mobiles

Playing games on a mobile phone (either those loaded on the phone or those that require the user to go online) has increased since 2012 (both in terms of users having ever done it or doing it at least quarterly), reflecting the increase in the use of smartphones.

As shown in Figure 34 below, almost half (46%) of mobile users have ever played games that are loaded on the phone, with more than one third (37%) doing this quarterly. This is an increase of seven percentage points for the quarterly measure (from 30%) and is attributable to an 11 percentage point increase among those aged 45-54 (from 19% to 30%). Those aged 16-24 are now more likely than in 2012 to ever play games loaded on the phone (82% in 2013 vs. 71% in 2012) as are those aged 65+ (8% in 2013 vs. 2% in 2012).

A quarter of all mobile users have ever played games over the internet using their phone (25%), with 17% doing this at least quarterly. The increase of five percentage points since 2012 in the former measure (having ever done this) is attributable to an increase among those aged 25-34 and 45-54, those living in C1 and C2 households, and males.

Figure 34: Frequency of playing games loaded on the phone, by age: 2012 and 2013



M8E – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded)
 Base: All adults aged 16+ who use a mobile phone (1608 in 2012, 1465 in 2013, 231 aged 16-24 in 2012, 222 aged 16-24 in 2013, 229 aged 25-34 in 2012, 258 aged 25-34 in 2013, 298 aged 35-44 in 2012, 262 aged 35-44 in 2013, 227 aged 45-54 in 2012, 217 aged 45-54 in 2013, 238 aged 55-64 in 2012, 234 aged 55-64 in 2013, 385 aged 65+ in 2012, 272 aged 65+ in 2013) Significance testing shows any change between 2012 and 2013
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

One in ten (10%) internet users say they have ever gambled online, with around one in twenty (6%) doing this at least quarterly.

A similar number (13%) of internet users say they have ever looked at adult-only websites, with 6% saying they do so at least quarterly. In 2013, males were almost five times more likely than females to say they had ever looked at adult-only websites (23% vs. 5%). There are also some differences by age in looking at adult-only websites; those aged 55-64 (7%) and 65+ (6%) are less likely to say they do this.

Only 7% of internet users say they have ever visited dating websites, with 3% saying they do so quarterly.

4.14 Apps vs. browsers

With the increase in the use of smartphones and tablets to go online, we asked app users about their preferences for using apps or browsers for particular activities.

Apps are preferred for looking at news, for gaming and downloading music

Three quarters of app users say they look at news online (76%), and half of app users who look at news said they prefer to use an app than a browser (50% vs. 36% prefer browser).

As Figure 35 illustrates there is a clear preference for using apps rather than browsers for gaming and for downloading videos and music. The majority of app users said that they ever played games (67%) or downloaded music or videos (60%). More than eight in ten app users who played games said they preferred to use an app (85% vs. 5% prefer browser) and

seven in ten of those who ever downloaded music/ videos said they preferred to use a browser (69% vs. 16% preferred a browser).

Browsers are preferred for shopping and looking for information

Most app users say they search for information online (93%) and six in ten app users who ever look for information said they prefer to use a browser (62% vs. 25% prefer app).

Three in four (76%) of all app users say they have ever shopped online, and of these, half (50%) say they prefer to use a browser, compared to one in three (35%) who prefer an app.

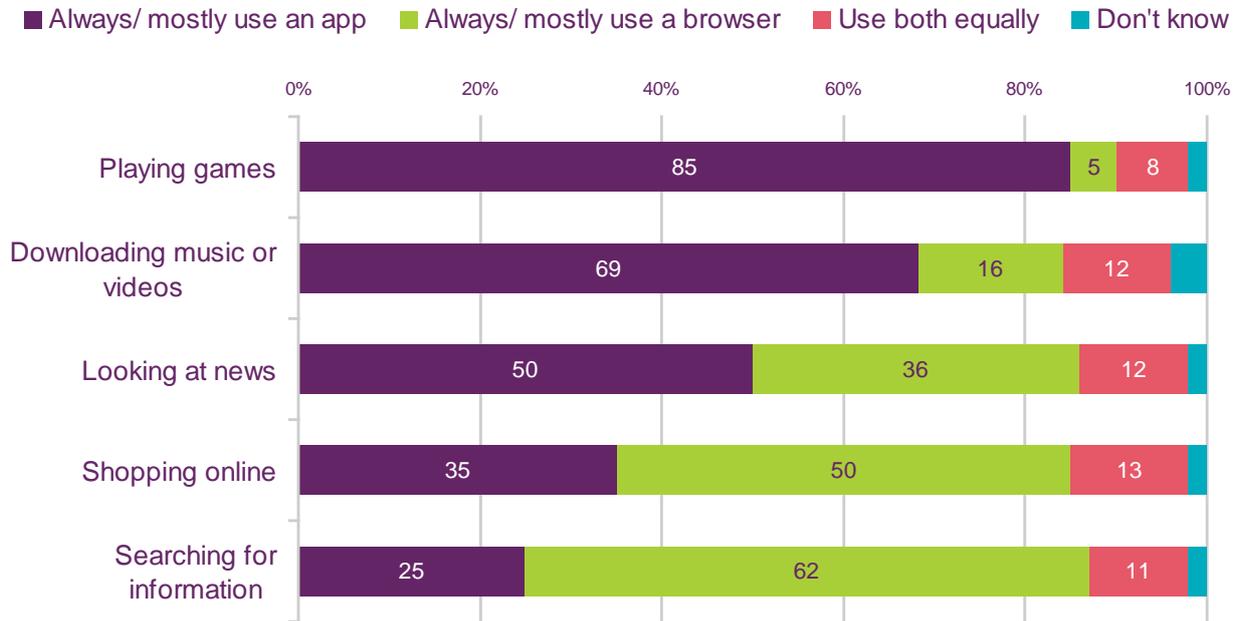
Personal recommendations are most important for app users

For finding out about apps, personal recommendation is very important; three-quarters (77%) of app users (who have downloaded apps in the past six months) say they found out about the apps through recommendations from friends or family.

The next most commonly-mentioned source is the app store chart or top chart listings (38%), while social networking sites introduce a minority of app users to new apps, either through recommendations (18%) or advertising/ promotions on the site (17%).

A similar proportion of app users say they found out about the apps they downloaded in the past six months through promotions/ advertising within an app they already owned (15%) or from recommendations in the media (15%). Advertising in the media is mentioned by one in ten (11%) app users.

Figure 35: Using an app vs. using a browser, among app users and among those accessing each type of content: 2013



Q30. Please think about using your (MAIN DEVICE FOR USING APPS). Some people when using their (MAIN DEVICE FOR USING APPS) use apps to get to the content that they want. Other people tend to get the content that they want by using a browser – such as Apple's Safari, Google Chrome, Microsoft Explorer or Mozilla Firefox. Which of the options on this card apply to you when you use your (MAIN DEVICE) for each of the following uses that I'll read out?. (prompted responses, single coded)

Base: Adult internet users aged 16+ with a main device for using Apps- excluding those who say they never undertake each activity, variable base per activity

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

5 Knowledge and understanding of media

The extent to which people evaluate media content is a key media literacy indicator, providing insight into levels of critical thinking and the ability to make informed media choices. Factors such as knowledge and understanding, as well as attitudes and behaviours, can affect the evaluation of content and levels of trust and engagement with the media.

This chapter explores attitudes to media across a range of platforms, and focuses on attitudes related to being online; such as making judgements about online content, services and apps, confidence as an internet user and concerns about all media platforms.

We also look at attitudes to, and knowledge of, how the media is funded and regulated across all platforms. A comprehensive chart pack of all the findings in this section, including by age and demography, can be found at www.ofcom.org.uk/medialiteracyresearch.

5.1 Section overview

- Six in ten (59%) search engine users know that results pages can contain both accurate and inaccurate information, while 22% think that sites listed will have accurate and unbiased information, and 13% just use sites they like the look of.
- One in three (35%) internet users say they tend to trust what they read or see on social networking sites or apps.
- Six in ten viewers of TV news (60%) and 66% of listeners to radio news trust these news sources, and half of internet users who visit news websites or apps trust online news (52%).
- At an overall level, most (86%) internet users are confident about their internet use and 76% are confident they can judge whether to trust the websites they use.
- One in five (20%) app users have concerns about apps. Half (51%) of internet users have concerns about content on the internet, unchanged since 2011.
- Six in ten of those with a TV don't think it matters how TV programmes are funded or owned, as long as the programmes are good (58%). A similar proportion of radio listeners feel this way about radio programmes (60%).
- Four in ten adults (41%) are unsure how the BBC website is funded.
- Nearly half of all adults (46%) believe that the internet is regulated in terms of what can be shown and written.
- Seven in ten (70%) internet users feel that websites such as YouTube and Facebook should monitor their own content to stop users from posting offensive material.
- Eight in ten people agree that they should be protected from inappropriate or offensive content on the platforms they use.

5.2 Attitudes, beliefs and behaviours

To provide some insight into attitudes across various media, such as what people think of the content they consume and to what extent they believe what they see, hear and read, we asked respondents to agree or disagree with a number of statements.

Over eight in ten internet users agree that “the internet is for people like me”

To gauge whether internet users feel the online space is a natural environment for them to inhabit, we asked them whether they agreed with the statement: “the internet is for people like me”. Eight in ten (85%) agreed, and this figure is unchanged since 2012. Those aged 65+ are less likely to agree compared to all users (71% vs. 85%).

Most people say they behave in the same way online as they do offline

We also wanted to understand the extent to which people feel they behave differently online to how they are offline, and asked for views on the statement: “I behave in a different way when I’m online to when I talk to people face to face”. One in five (19%) agreed that they behave differently online.

Those aged 16-24 are more likely to agree, compared to all users (28% vs. 19%), while internet users aged 55+ are less likely to agree (13% agree vs. 19% for all users).

Over half of older users tend only to use websites they have used before

We asked people approximately how often they visit new websites (those they haven’t used before), and one in three internet users (34%) say they only use websites they’ve used before, most weeks when going online. One in four (26%) say they use lots of websites they haven’t used before, and the remaining 40% use “maybe one or two” sites they have not used before.

Sticking to tried and tested websites is less likely for 16-24s (25%) and more likely for those aged 65+ (56%). Those living in DE households are also more likely than all internet users to use only those websites they’ve used before (45%), as are females (38% vs. 29% for males). Males are more likely than females to use lots of websites they haven’t used before (31% vs. 22%).

Six in ten app users agree that the same apps can be accessed on different operating systems

With the increasing levels of accessing the internet via mobiles and tablets, we wanted to find out the extent of people’s understanding of the app environment. We asked people if they agreed with the statement: “The same apps and app stores can be accessed on each of the different operating systems available for smartphones and tablets”. A majority of app users (61%) agreed with the statement and one in six (16%) disagreed.

Six in ten search engine users know that results pages can contain both accurate and inaccurate information

To assess the extent to which online users have critical understanding about the content they access online, we asked them about their views on search engine results pages. Since 2012, there has been no change in perceptions relating to the accuracy or bias of the results returned by search engines, with six in ten (59%) who use search engines saying that some websites returned in search engine results will be accurate or unbiased whereas others won’t be.

However, 22% of all search engine users think that “if they have been listed by the search engine, these websites will have accurate and unbiased information”, and this doesn't vary by age, socio-economic group or by gender. One in eight (13%) “don't really think about whether or not the websites are accurate or unbiased and just use sites that they like the look of”.

In 2013, those living in AB households are more likely to give the correct response: that some websites will be accurate or unbiased whereas others won't be (66% vs. 59% for all search engine users) while those in C2 households are less likely (49%), due in part to their being more likely to say they “don't really consider whether the results are accurate/unbiased as they just use the sites they like the look of” (21% vs. 13%), for all search engine users.

One in three internet users tend to trust what they read or see on social networks

In terms of the content generated on social networking sites or apps, around one in three (35%) internet users agree with the statement: “When I visit social networking websites or apps, I tend to trust what I read or see” with more than four in ten (44%) disagreeing. Compared to 2012, there has been a decrease in the proportion of internet users saying they are unsure, or that they neither agree nor disagree with the statement.

A majority of viewers and listeners trust TV and radio news

We also ask respondents about the extent to which they trust news provision on the main platforms. Overall agreement with the statement: “When I listen to radio news I tend to trust what I hear” is the same as it was in 2012, with 66% of adults who listen to radio news agreeing with the statement. Six in ten TV news viewers (60%) agree with the statement “When I watch TV news I tend to trust what I see”¹³.

A third (34%) of adults who read newspapers agree with the statement “When I read newspapers I tend to trust what I read”. This is a similar figure to those reported in 2011 (32%), 2012 (35%) and 2009 (34%).

Regarding online news content, about half of internet users who visit news websites or apps (52%) agree that they trust what they read or see. Around one in four (26%) say they disagree. Again, overall agreement is unchanged since 2012.

Three-quarters of internet users are confident they can judge whether to trust the websites they use

As shown in Figure 36 below, three-quarters (76%) of internet users say they are confident in judging whether or not they can trust what they read or see on websites they use, and this is unchanged since 2011.

Younger internet users are more likely to say they are confident in judging whether or not they can trust what they read or see on websites (86% vs. 76% for all), while those aged 65+ are less likely to say they are confident, compared to all internet users (56% vs. 76% for all).

¹³ The questions regarding trust in news were asked about each type of media as a whole, not specific TV channels, radio stations, news websites or newspapers. As a result, it is not possible to say which specific news sources within each media the users are considering when they respond to these questions. It is also important to note that these questions were not grouped together in the survey, so that respondents were not actively comparing the different media. These points may help to explain why these findings differ from those of our Media Tracker, reported in Ofcom's report [UK Audiences attitudes to the broadcast media](#)

Men are more likely than women to say they are very confident in doing creative things online

As shown in Figure 36 below, seven in ten (72%) internet users say they are confident using the internet to do creative things (like making blogs, sharing photos or uploading short videos), and more than four in ten (44%) say they are very confident. At an overall level these measures have not changed significantly since 2011.

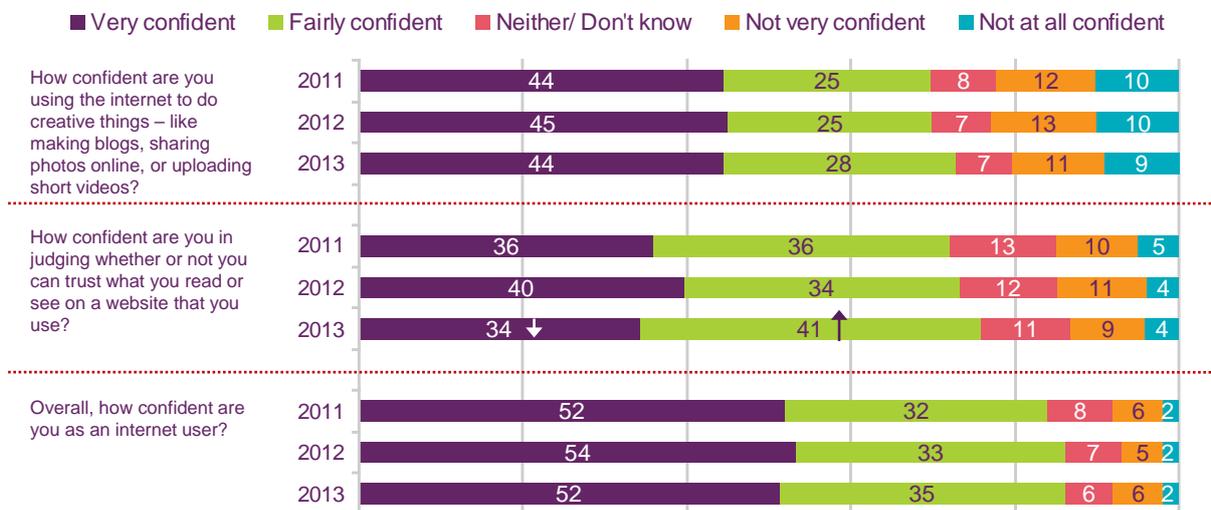
There are some significant differences by age regarding doing creative things online, with 89% of 16-24s saying they are confident in this, compared to 72% of all users, and the opposite being reported for older people, with 57% of 55-64s and just over a third (36%) of those aged 65+ saying they are confident doing creative things online.

At an overall level, eight in ten internet users are confident about their use of the internet

As shown in Figure 36 below, at a general level, more than eight in ten respondents are confident internet users (86%), with a majority (52%) saying they are very confident, and less than one in ten (8%) either not very or not at all confident. There has been no change for this measure since 2011.

Younger internet users, aged 16-24 and 25-34, are more likely to say they are very confident internet users (71% and 63% vs. 52%), while 55-64s and over-65s are less likely to be very confident (37% and 22% vs. 52% for all). Those aged 65+ are also more likely to say they are not very confident, compared to all users (24% vs. 6%).

Figure 36: Confidence as an internet user: 2011, 2012, and 2013



IN15A-C I'm going to read out some questions about confidence using the internet, for each one please say which of the options on the card applies to you. (Prompted responses, single coded)
 Base: Adults aged 16+ who use the internet at home or elsewhere (1369 in 2011, 1381 in 2012, 1272 in 2013).
 Significance testing shows any change between 2012 and 2013
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

5.3 Media concerns

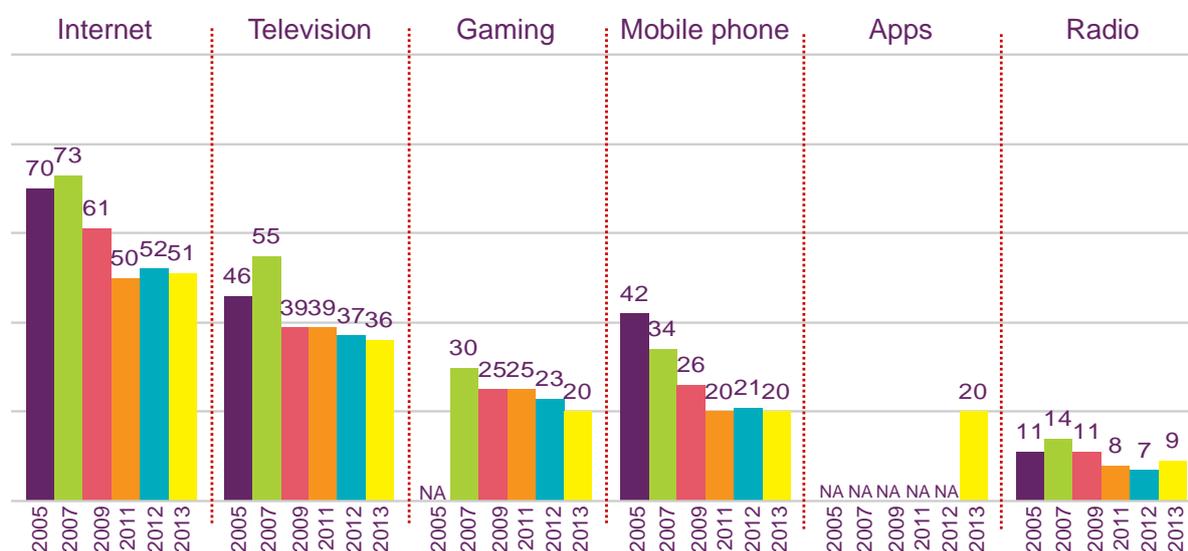
Concerns about media can influence levels of use and confidence, and we have been measuring levels of concern across a range of media since 2005.

One in five app users have concerns about apps

As shown in Figure 37 below, more people have concerns about the internet and TV, while relatively few have concerns about radio. This is a continuing trend since 2005.

In 2013, respondents were asked for the first time about concerns about apps. One in five (20%) app users report being concerned about apps; comparable to the 20% of mobile phone users who report having concerns about mobiles and the 20% of those who play games having concerns about gaming.

Figure 37: Concerns about platforms among users: 2005, 2007, 2009, 2011, 2012 and 2013



IN30/ T5/ G7/ M3/ Q34/ R5 – Can you tell me if you have any concerns about what is on the internet/ TV/ gaming/ mobile phones/ apps/ radio? (unprompted responses, multi-coded)

Base: Adults aged 16+ who use each platform (variable base). Significance testing shows any change between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

One in two internet users have concerns about the internet

Compared to 2012, there are no changes in levels of concern that internet users have about the internet. One in two internet users are concerned about the internet (51%) overall, with one in three (35%) concerned about offensive/ illegal content and one in five concerned about security/ fraud (22%). Around one in seven (15%) are concerned about risks to others/ society. Concerns about advertising or personal privacy are held by less than one in ten internet users (both 8%).

One in three TV viewers have concerns about TV content

Slightly more than one in three (36%) of all adults with televisions in the household say they have concerns about what is on TV, the same as in 2012. One in five are concerned about offensive content (20%). A similar proportion (18%) are concerned about quality of content/

repeats, although this represents a decrease of four percentage points; from 22% in 2012. Less than one in ten are concerned about advertising / sponsorship (6%), diversity in content (4%) or have concerns relating to trust/ bias etc. (2%).

One in five gamers have concerns about games

Overall, one in five (20%) of those who play games have concerns. One in eight (13%) are concerned about offensive content, with considerably less (3%) concerned about risks to others/ society, health (3%) or affordability (4%). There has been no change in the overall level of concerns, compared to 2012. Those who play games are, however, less likely to have concerns relating to health compared to 2012 (3% vs. 7% in 2012).

One in five mobile users have concerns about mobile phones

Around one in five (20%) mobile phone users have concerns about their mobile phone use. When broken out into types of concern, similar proportions (albeit relatively few) are concerned about affordability (7%), risks to others/ society (6%), security/fraud (5%), privacy (4%) and health (3%). Compared to 2012, mobile users are less likely to be concerned about security/ fraud (5% vs. 7% in 2012), privacy (4% vs. 6% in 2012) or health (3% vs. 5% in 2012).

Since 2005 concerns about mobile phones have more than halved; from 42% in 2005 to 20% in 2013. This is the greatest decline in concerns over time across all devices.

5.4 Media funding

Different funding models exist for different media platforms and sources. Knowing how the media are funded, and being able to distinguish between editorial and advertising content, is important in order to make informed choices about media consumption, particularly in relation to online content.

The following findings provide insight into people's awareness of how a range of media are funded, and whether the funding model influences how people feel about the content.

Six in ten adults don't think it matters how TV programmes are funded or owned, as long as they are good

Three-quarters of adults (76%) understand how BBC TV programmes are mainly funded. While this figure has not changed since 2012, it has decreased from 84% in 2005.

While the figure for ITV, Channel 4 and Five is slightly lower, with two-thirds of adults (67%) understanding how TV programmes are mainly funded on these channels, the pattern is the same as for the BBC, with the overall figure unchanged since 2012 but showing a decline since 2005 from 76%.

Compared to 2012, there has been an increase in the proportion of adults who don't know how TV programmes are mainly funded on the BBC (18% vs. 15%) and on ITV, Channel 4 and Five (19% vs. 16%).

In 2013, these findings varied significantly by age, with four in ten 16-24s saying they don't know how BBC TV programmes are funded (43%) or how programmes on ITV, Channel 4 and Five are funded (40%).

In contrast, only one in 20 of people aged 55-64 say they don't know how BBC TV programmes are funded (6%) or how programmes on ITV, Channel 4 and Five are funded (4%).

As shown in Figure 38 below, when prompted with the statement "As long as TV provides good programmes it doesn't really matter who owns the channels or how they're funded", six in ten adults with televisions in the household (58%) agreed with the statement. Close to three in ten (28%) agreed strongly and 30% agreed slightly.

In 2013, the only difference by age is, again, among those aged 16-24, who are more likely than all adults to agree with this statement (67% vs. 58%).

These findings suggest that those aged 16-24 are not as engaged as all adults with the issues of TV media funding and ownership.

Figure 38: Agreement with statements: "As long as TV/ radio/ the internet/ newspapers provides good programmes/ websites/ news it doesn't really matter who owns the channels/ stations/ websites/ newspapers or how they're funded": 2013



T7C/ R7C/ IN36F/ Z3B – Please use this card to tell me the extent to which you agree or disagree with some things that other people have said about television/ radio/ the internet / newspapers? (Prompted responses, single coded) NB figures shown for TV/ Radio/ Internet are based on users of each platform while those for Newspapers are based on all adults
 Base: All with any TVs in the household (1610), All who listen to radio at home (1124), All who use the internet at home or elsewhere (1272), All adults (1642) Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Two-thirds of adults know how BBC radio stations are funded

Awareness of how BBC radio stations are mainly funded is slightly lower than awareness of how BBC television programmes are mainly funded. Around two-thirds of adults (64%) give the correct response for how BBC radio stations are funded; about one in ten give an incorrect response (8%) and about three in ten (28%) are unsure how they are funded. These figures have remained consistent since 2005.

Six in ten adults (60%) understand how the other main (non-BBC) radio stations are funded, and most of the other adults (29%) say they are unsure. There has been no change in either of these figures since 2012. Since 2005, however, awareness of how the other main radio stations are funded has increased (from 52% to 60% in 2013).

As with television, six in ten adults who listen to the radio at home (60%) agree with the statement: "As long as radio provides good programmes it doesn't really matter who owns the stations or how they're funded". Once again, there is no change in this finding since 2012 (58%).

To complete the picture, we also asked all adults the extent to which they agreed with the statement: "As long as newspapers provide news it doesn't really matter who owns them or how they're funded". At 40%, overall agreement is lower among all adults than for TV viewers (58%) or radio listeners (60%).

One third of adults know how search engines like Google are funded

Knowledge of how the BBC's website is mainly funded is lower than for TV or radio. As was the case in 2012, around half (52%) of adults understand how the BBC's website is mainly funded and most of the other adults (41%) say they don't know. These responses are unchanged since 2012.

Compared to 2005, however, adults are more likely to understand how the BBC website is funded (52% vs. 46% in 2005). In comparison to knowledge of how the BBC website is funded, knowing how search engine websites such as Google or Ask.com are mainly funded is lower, with around one-third of adults (36%) giving the correct response and almost half of adults (49%) saying they don't know. Again, these findings are unchanged since 2012.

Compared to TV viewers and radio listeners, internet users are less likely to be unconcerned about funding or ownership of online material. Around half (48%) of adults who use the internet agree that: "As long as the internet provides good websites it doesn't really matter who owns the websites or how they're funded". Compared to 2012, there has been no change in the overall level of agreement with this statement (50% in 2012 vs. 48% in 2013), although internet users are now less likely to agree strongly (22% in 2013 vs. 26% in 2012).

5.5 Media regulation

Understanding the fundamentals of media regulation is an important factor in allowing citizens and consumers to make judgements about the origins, trustworthiness and appropriateness of different types of content.

Different models of regulation exist for different media platforms¹⁴ and there are varying degrees of knowledge and expectations about what levels of regulation apply to which media. In the survey, the focus was on content regulation across the platforms; i.e. "what is shown and written".

Understanding of current regulation across different platforms

As shown in Figure 39 below, more than eight in ten (84%) adults are aware that TV programmes are regulated; this is unchanged since 2012. Since 2005, however, awareness has increased (from 81%). In 2013, those aged 16-24 (67%) and those living in DE households (71%) were less likely than all adults to say that TV is regulated.

Seven in ten (72%) adults believe that radio is regulated, and while this is unchanged since 2012, it has increased from 59% in 2005. Those aged 16-24 (53%) and those living in DE households (57%) are less likely than all adults to say that radio is regulated.

¹⁴ Regulation of online, games and mobile content is of course a very complex area, with some elements having some regulatory oversight and others none at all. We nonetheless continue to ask respondents about their overall knowledge and opinion to benchmark how such opinion changes over time and relative to other forms of media.

A similar number of people (71%) say that the press is regulated, and while this figure is unchanged since 2009 (at 70%) it has increased from 57% in 2005. In 2013, just over one in ten people believed the press was not regulated (13%) and one in six was unsure (16%). Those aged 16-24 (60%) and those living in DE households (65%) are less likely than all adults to say the press is regulated.

In comparison to TV, radio and press regulation, the regulation of mobile content, gaming and the internet is more complex and nuanced, and this is reflected in the findings.

Around half of adults (49%) do not know whether mobile phone content is regulated or not. Just over a quarter of adults (27%) believe that it is regulated, and a quarter believe that it is not (25%). Similarly, 43% of adults do not know whether gaming is regulated. Four in ten adults (40%) believe that it is regulated and around one in six (17%) believe it is not.

All of these measures for both mobile content and gaming are unchanged since 2012.

A significant amount of content on mobiles and tablets is accessed via apps, and the research suggests there is a widespread lack of awareness about whether or not apps are regulated. Almost half (47%) of adults with a device for using apps say they don't know whether apps are regulated in terms of their content. One-third of app users (33%) believe that apps are regulated in terms of their content and one in five (20%) believe they are not. App users aged 16-24 are more likely to believe that app content is regulated (45% vs. 33%).

Just under half of all adults (46%) believe that the internet is regulated in terms of what can be shown and written. This measure has not changed since 2012, but has increased from 30% in 2005. In 2013, a quarter of adults believe the internet is not regulated (26%) while a similar proportion (28%) are unsure. Both of these measures are unchanged since 2012.

Figure 39: Awareness of media regulation, by platform: 2013



T6 / R6/ Z2/ IN31/ G8/ M7– As far as you know, are TV programmes regulated/ is radio regulated in terms of what can be broadcast/ is the press regulated in terms of what they show and write/ is the internet regulated in terms of what can be shown and written / Is gaming regulated at all/ is mobile content – such as the websites that you visit directly or through an app on your mobile phone or the videos you may download on your mobile – regulated at all ? (Unprompted responses, single coded)

Base: All adults aged 16+ (1642 in 2013).

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

While the internet as a platform is not regulated by a specific authority in terms of what can be shown and written, some online audio-visual content is subject to regulation.¹⁵ Again, this complexity is reflected in the findings, with just under half of all adults (45%) believing that programmes or clips on broadcasters' websites are regulated, and close to three in ten (28%) believing that content on sites such as YouTube is regulated. These figures are unchanged since 2012.

In 2013 we carried out an additional survey among internet users to get a deeper understanding of their online use and understanding, including internet regulation. We also asked them the question: "Is the internet regulated in terms of what can be shown or written?" Almost half (47%) of internet users said that the internet is regulated in terms of what can be shown or written online. Around a quarter of internet users (28%) believe the internet is not regulated and a similar number (25%) say they don't know whether it is or not. Being unsure whether the internet is regulated is more likely among internet users aged 16-24 (35% vs. 25%).

When those who said the internet was regulated were asked about who was responsible for regulating it, one in ten of all internet users¹⁶ (10%) believed the internet was regulated by the internet sites themselves, and a similar proportion (9%) believed that Ofcom regulated the internet¹⁷.

Grouping together the various nominations for UK-based governments (i.e. Westminster, Scottish Executive, Welsh Assembly, Northern Ireland Assembly), one in 20 internet users (6%) believe that the government regulates the internet; and this is more likely among those aged 45-54 (11% vs. 6%). One in 20 (6%) believe that ISPs regulate the internet.

Internet users were also asked to agree or disagree with the statement: "The internet needs to be regulated in terms of what can be shown and written online". Almost eight in ten (78%) agreed, rising to 90% of those aged 65+ while 68% of those aged 16-24 agreed with the statement.

Seven in ten internet users feel that the websites themselves should monitor their content to avoid offensive content being posted by individuals

Given the popularity of social media and user-generated content, internet users were also asked whether the content that members of the public post online should be regulated. Almost seven in ten (68%) say it should; one in seven say it should not be regulated (16%), and the same proportion (16%) are unsure. Users aged 55 and over are more likely to say that what members of the public say online should be regulated (75% vs. 68%), with no other differences by age.

When those who felt that such online content should be regulated were then asked who should regulate what members of the public say online, one in five¹⁸ (20%) believe this should be done by internet sites themselves, while one in eight (13%) say the government, and one in ten Ofcom (9%).

¹⁵ For example, Ofcom regulates of television channels delivered over the internet and On-Demand Programme Services when they are established in the UK. Ofcom has delegated responsibility for regulating on-demand programme services to ATVOD.

¹⁶ The proportions have been rebased to reflect the incidence among all internet users rather than all internet users who think that the internet is regulated

¹⁷ In the survey, if people required a prompt, regulation was described as being carried out by "an authority or governing body which is often call a 'watchdog' which can set rules of guidelines about content. People can also contact the watchdog if they wish to complain".

¹⁸ The proportions have been rebased to reflect the incidence among all internet users rather than all internet users who think that what the general public say online should be regulated

Focusing on particular types of online content, we asked internet users how they thought offensive content, posted by individuals on sites like YouTube or Facebook, should be dealt with, and seven in ten (70%) internet users felt that that the websites themselves should monitor the content to ensure it doesn't happen, with those aged 16-24 less likely to say this (61%).

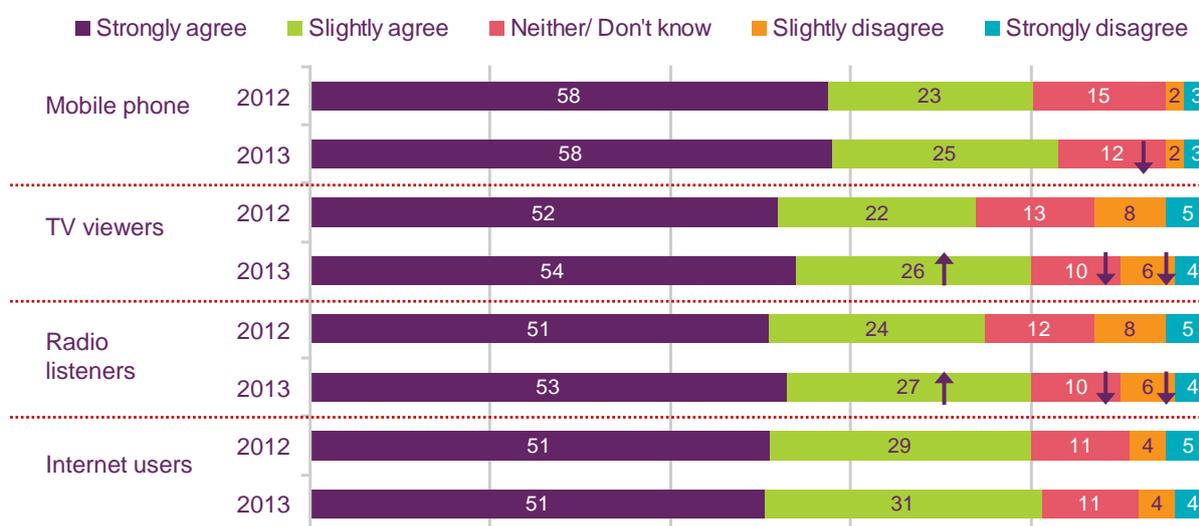
Around half feel that users should report the content to the website (52%) and one in four (24%) think that users should stop using that website, with this being more likely among older internet users (32% for 55-64s).

The majority of people agree that they should be protected from inappropriate or offensive content on the platforms they use

Each year respondents are asked whether people should be protected from inappropriate or offensive content on TV, radio, online and on mobiles. As shown in Figure 40 below, the results across all platforms are very similar, with the vast majority of adults agreeing that they should be protected from inappropriate or offensive content on the platforms they use (80% for TV, 81% for radio, 81% for internet and 83% for mobile).

In 2013, internet users were asked the extent to which they agreed with the statement: "I should be free to say and do as I want online". More than four in ten (44%) internet users agreed with this statement, compared to eight in ten (81%) internet users who agreed that they should be protected from inappropriate or offensive content online, suggesting some overlap in attitudes to freedom versus protection.

Figure 40: Agreement with statements: "Mobile phone users/ TV viewers/ radio listeners/ internet users must be protected from seeing inappropriate or offensive content": 2012-2013



T7A/ R7A/ IN36E/ M9 – Please use this card to tell me the extent to which you agree or disagree with some things that other people have said about television/ radio/ internet/ mobile phone . (Prompted responses, single coded)

Base: All with any TVs in the household (1770 in 2012, 1610 in 2013), All who listen to radio at home (1285 in 2012, 1124 in 2013), All who use the internet at home or elsewhere (1381 in 2012, 1272 in 2013), All who use a mobile phone (1608 in 2012, 1465 in 2013). Significance testing shows any difference between 2012 and 2013.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Online copyright continues to split agreement

Around four in ten adults (38%) agree that downloading music or films for free online should be illegal, with a similar proportion (36%) saying that it should not be illegal. One in four (26%) are undecided. While there are no changes in attitudes to online copyright infringement since 2012, the overall trend since 2009 is for opinion to move away from it being illegal. As was the case in previous years, younger adults in 2013 are more likely than all adults say that it should not be illegal (53% for 16-24s, 47% for 35-34s vs. 36% for all).

6 Online safety and security

Knowing how to stay safe and secure online is a core element of media literacy, and affects all internet users. A lack of online safety and security skills makes full engagement with the digital world difficult and potentially risky. Competence in this area can be influenced by a range of factors including awareness of risk and attitudes and exposure to risk, as well as negative experiences and knowledge of how to protect oneself online. Central to these issues are people's attitudes and behaviour in relation to personal data.

The chapter section looks in detail at attitudes and behaviours around the use and management of personal information, and provides key findings in relation to awareness and use of security features and the incidence of negative online experiences.

A comprehensive chart pack of all the findings in this section, including by age and demography, can be found at www.ofcom.org.uk/medialiteracyresearch.

6.1 Section overview

- There is a mixed picture in terms of providing personal information online. Over eight in ten (86%) internet users say they give only the minimum amount of personal information required online, but 42% say that they are happy to provide personal information online to companies as long as they get what they want.
- Most Facebook users say they only share photos (80%) and opinions (70%) with friends online and 65% have made their profiles more private.
- In 2013, 55% of internet users said that they made a formal judgement about a website before entering personal details, compared to 61% in 2012.
- A majority of internet users trust government/ council websites (61%) and commercial websites and apps (59%) to hold their personal information securely.
- Half of internet users (54%) think that people who buy things online put their privacy at risk.
- The majority of people who use the internet on a PC/ laptop/ netbook use anti-virus software and firewalls while the majority of mobile users use only one mobile security feature, screen locks.
- Half of internet users skim-read website terms and conditions.
- A majority (57%) of internet users use the same password for most websites.
- One third of those with a current social networking site profile (36%) have blocked someone on social networks in the past 12 months.
- The majority (63%) of internet users know how to report inappropriate or offensive content online but only a minority (10%) have done so in the past 12 months.

6.2 Managing personal information online

One in four internet users give out inaccurate or false details on some websites to protect their personal identity online

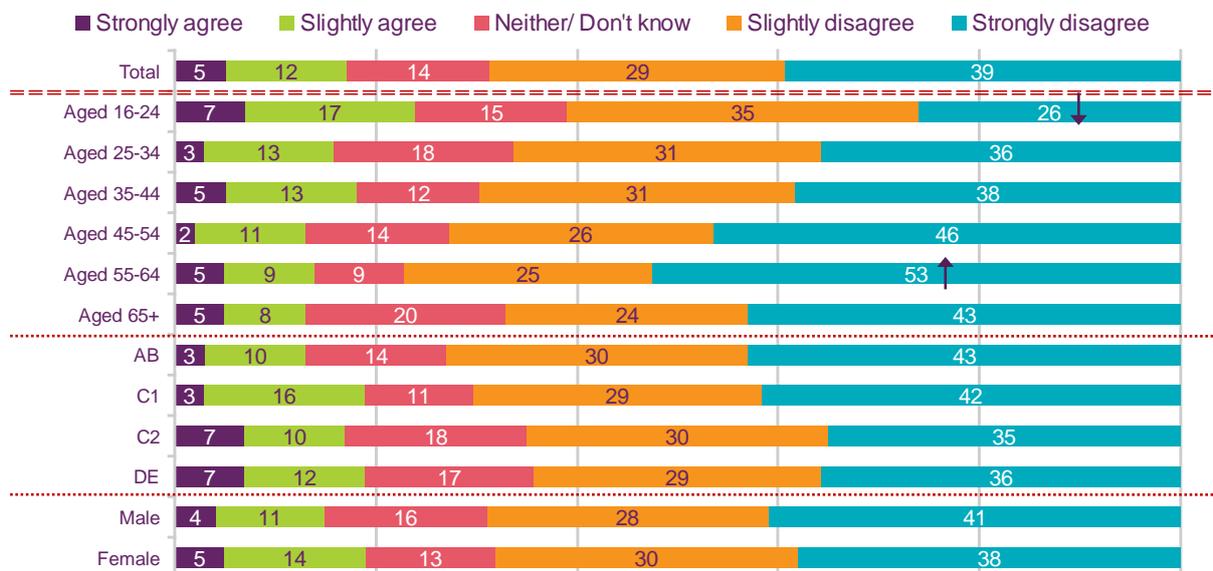
To get an indication of how internet users judge online situations, particularly in relation to privacy and security issues, we asked them about their habits when visiting new websites and sharing personal information and content.

When asked about the statement: "I give out inaccurate or false details on some websites to protect my personal identity online", a quarter (26%) of internet users agreed they did this, rising to one third (34%) of those aged 16-24. Six in ten (61%) disagreed with the statement, with older age groups more likely to disagree (72% of 55-64s and 74% of over-65s).

More than eight in ten (86%) agree with the statement "I only give the minimum amount of personal information required", with little variation based on age, gender or household socio-economic group. However, a large minority of internet users indicate that they would trade their details in return for something they wanted. Four in ten (42%) agree with the statement: "I am happy to provide personal information online to companies as long as I get what I want". Younger users are more likely to agree, with 55% of those aged 16-24 agreeing, compared to 42% of all internet users.

Overall, personal information appears to be an area that most internet users actively consider, as Figure 41 illustrates. When asked about the statement: "I don't really think about the personal information I am providing to companies online", seven in ten internet users disagreed (69%). However, 17% agreed that they did not think about their data, rising to one in four (24%) of those aged 16-24.

Figure 41: Agreement with statement: "I don't really think about the personal information I am providing to companies online", by demography: 2013



IN39D. Please take a look at the four statements shown on this card and tell me which number on this scale from 1 to 5 best describes how you feel about providing personal information to companies or organisations online (prompted responses, single coded) Base: Adults aged 16+ who use the internet at home or elsewhere (1272 aged 16+, 219 aged 16-24, 254 aged 25-34, 243 aged 35-44, 201 aged 45-54, 192 aged 55-64, 163 aged 65+, 325 AB, 407 C1, 242 C2, 298 DE, 613 males, 659 females). – Significance testing shows any difference by age or socio-economic group compared to all adults and between males and females Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

App users say they prefer apps that don't ask for too much personal information

When asked whether they agreed or disagreed with the statement: "I consider the personal information I would need to give before I download an app", more than four in five (85%) app users say they consider the implications for their personal data before downloading an app, with only one in ten disagreeing (11%).

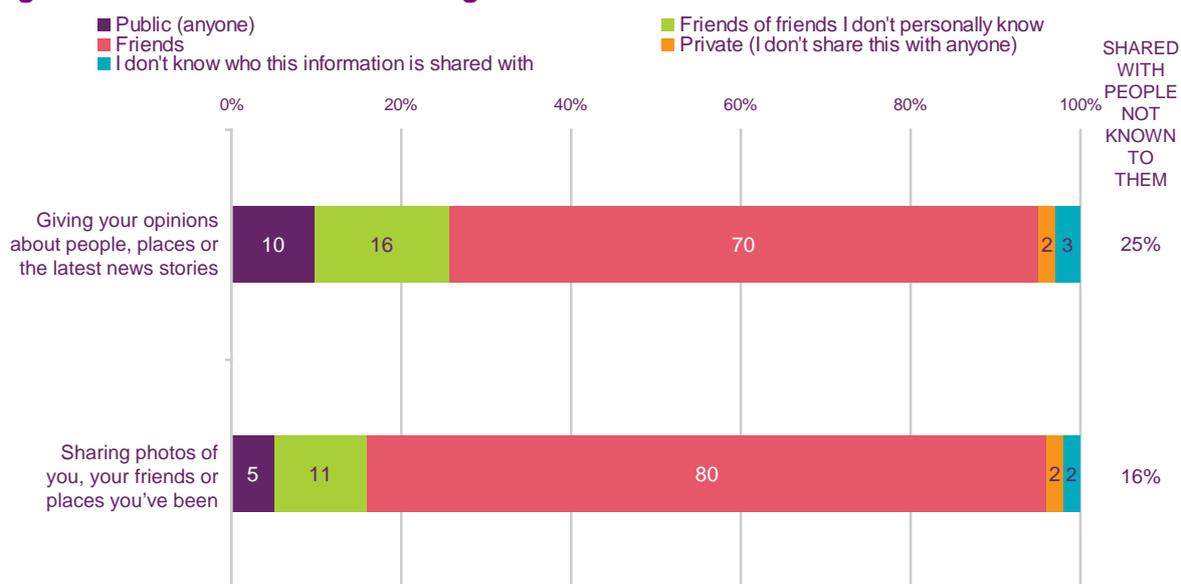
App users also expressed a clear preference for only downloading apps that don't ask for too much personal information, with almost eight in ten (78%) agreeing with the statement: "I only download apps that don't ask for too much personal information". One in seven (15%) disagreed.

The majority of Facebook users say they only share photos or opinions with friends

This stated preference for keeping personal information private is also reflected in social networking behaviour, with the majority of Facebook users saying that they only share photos (80%) or their opinions (70%) with their friends on Facebook.

However, as shown in Figure 42 below, one quarter (25%) of all Facebook users share photos with people not known to them, and one in six of (16%) share their opinions with people not known to them.

Figure 42: Facebook users sharing information with others: 2013



Q13A-B. I'm going to read out some things you may do on Facebook, please tell me which one of these options applies in terms of who you share this type of information with (prompted responses, single coded)

Base: Adult internet users aged 16+ with a current social networking site profile on Facebook – who say they undertake each activity (variable base)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Anonymity is valued by social network users

Only a minority (15%) of Facebook users share their real name (as opposed to a nickname or alias) with anyone on Facebook. The majority (72%) share this only with their friends, and females are more likely than males to say they share this information only with friends (76% vs. 67%).

Similarly, seven in ten (72%) Facebook users only share their location by 'checking-in' online with their friends, with less than one in twenty (6%) saying they share this information publicly. Sharing such information publicly is more prevalent among those aged 45+ compared to all Facebook users (12% vs. 6%).

One in four internet users say they would never enter their home telephone number online due to security concerns

Since 2005 we have asked internet users to consider types of personal contact/transactional information (such as their home address, credit card number and telephone number) and tell us how they would feel about entering these details online.¹⁹

More than four in ten (44%) internet users say they are happy to enter their personal email address online. This measure has fluctuated from 54% in 2005, to 37% in 2012 and back to 44% in 2013, when just under half (45%) said they would do it, but would have security-related concerns. One in ten said they would never do this because of security-related concerns (9%).

Compared to email addresses, internet users are less happy to enter their home address details online. Three in ten (32%) say they would be happy to enter their home address details online, with half saying they would do it, but with security concerns (52%). Around one in seven (15%) say they would never do this due to security concerns. There has been no change in any of these measures since 2012. In fact, since 2009, all of these measures have remained consistent.

Three in ten (30%) internet users say they would be happy to enter their debit or credit card details online, and more than half say they would do it, but with security concerns (54%). This is an increase of six percentage points, from 48% in 2012, for internet users who say they would do it but have concerns. Around one in eight (13%) say they would never do this due to security concerns.

Three in ten (30%) internet users say they would be happy to provide their mobile phone number online. Half (51%) say they would do it, but with security concerns and around one in six (17%) say they would never do it due to security concerns. These measures have not changed since 2012.

Around one in four (26%) internet users say they would be happy to provide their home landline information online, while less than half (44%) saying they would do it, but with security concerns. As shown in Figure 43 below, one in four (25%) say they would never do this due to security concerns. Since 2012, internet users are more likely to say they would never provide this information because of security concerns (25% vs. 21%).

¹⁹ Between 2005 and 2010 we asked separately about "paying by entering your credit card details" and "paying by entering your debit card details". In 2011, these separate codes were combined and for a year-on-year comparison have been compared against "paying by entering your credit card details".

Figure 43: Personal details people would never enter online due to security concerns, by age: 2013

	2013 Total	16-24	25-34	35-44	45-54	55-64	65+
Entering your home phone number	25%	21%	22%	25%	26%	29%	29%
Entering your mobile phone number	17%	15%	15%	13%	18%	19%	30% ↑
Entering your home address details	15%	12%	17%	11%	15%	20%	19%
Paying by entering your credit or debit card details	13%	14%	14%	8%	12%	14%	22% ↑
Entering your personal email address	9%	6%	10%	5% ↓	8%	15% ↑	17% ↑

IN33A-E – I'm going to read out some types of information you could be asked to enter when you go online, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns. (prompted responses, single coded)

Base: Adults aged 16+ who use the internet at home or elsewhere (1272 aged 16+, 219 aged 16-24, 254 aged 25-34, 243 aged 35-44, 201 aged 45-54, 192 aged 55-64, 163 aged 65+). – Significance testing shows any difference by age compared to all adults

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Internet users are less likely than in 2012 to make a formal judgement about a website before entering personal details

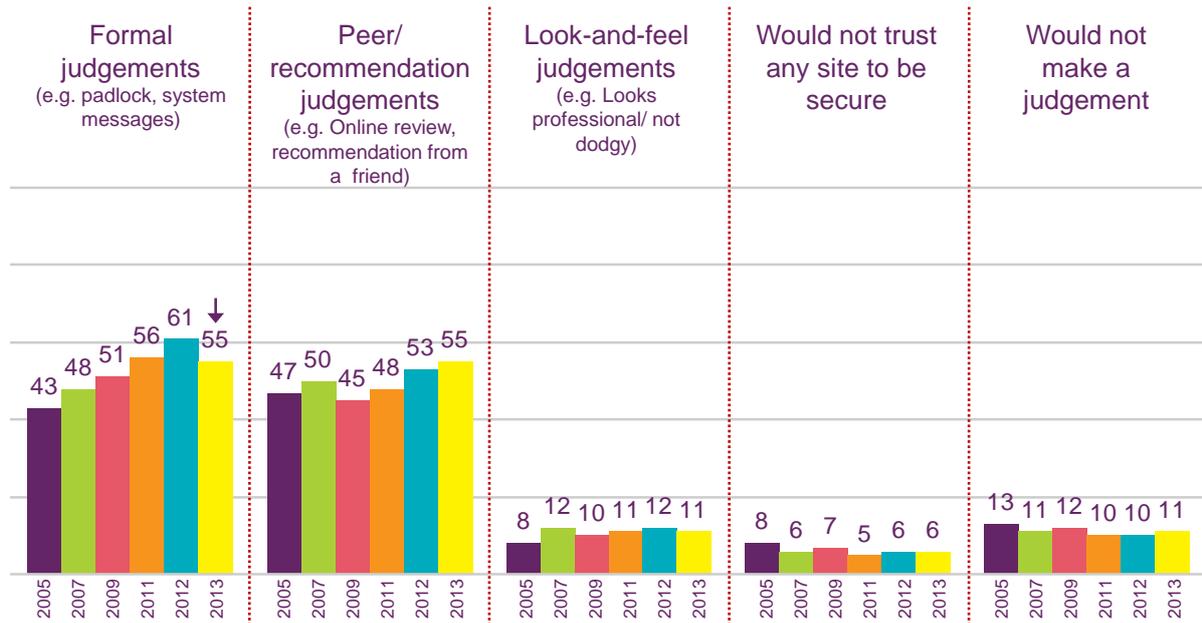
Having asked internet users to tell us how they would feel about entering personal details online, we then asked them to say whether they would make a judgement about a website before entering these types of details. Internet users were not prompted with any types of checks they might make.

In 2013, eight in ten (79%) internet users said they would make some kind of judgement about a website before entering personal details, with one in ten (11%) saying they would not make a judgement. These measures are unchanged since 2012.

Those aged 35-44 are more likely, compared to all adults, to say that they would make a judgement (86%), while those aged 65+ are less likely (69%). Those living in AB households are also more likely than all internet users to say they would make a judgement (86% vs. 79%) while DEs are less likely to say this (71% vs. 79%).

As shown in Figure 44 below, while a majority of internet users (55%) continue to make formal judgements (such as checking for a padlock symbol), this is less likely now than in 2012 (55% vs. 61% in 2012). The same proportion also rely on peer/ recommendation judgements (55%), with this figure unchanged since 2012. Around one in ten (11%) make judgements based on the look/ feel of the site.

Figure 44: Types of judgements made about a website before entering personal details online: 2005, 2007, 2009, 2011, 2012 and 2013



IN34 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure? (unprompted responses, multi-coded)

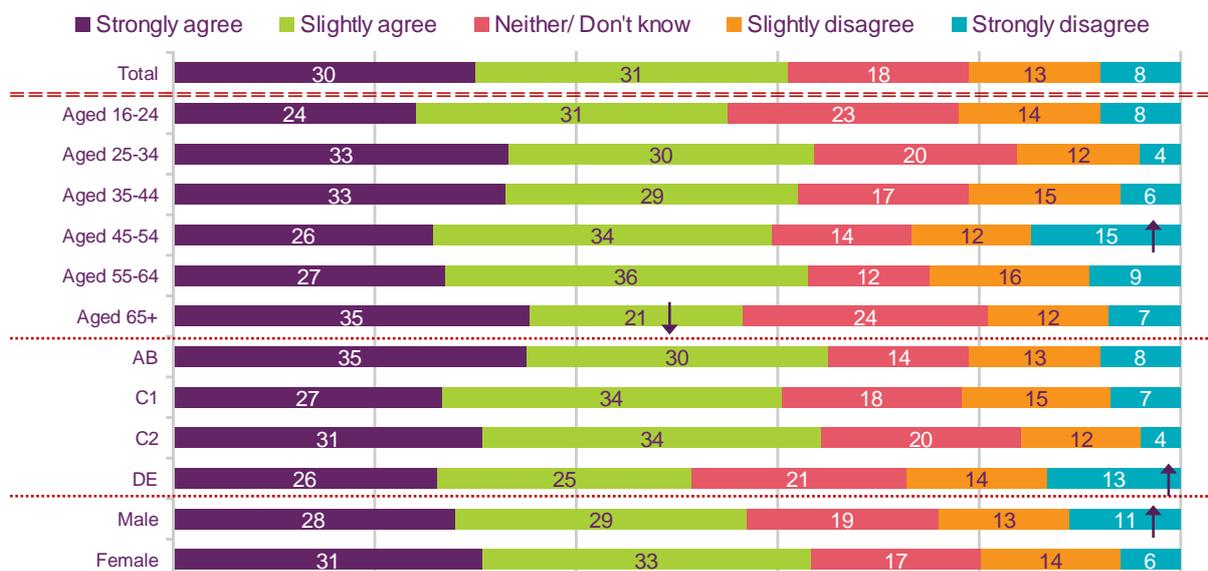
Base: Adults aged 16+ who use the internet at home or elsewhere (1468 in 2005, 1723 in 2007, 1282 in 2009, 1369 in 2011, 1381 in 2012, 1272 in 2013). Significance testing shows any change between 2012 and 2013
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

A majority of internet users trust government/ council websites and commercial websites and apps to hold their personal information securely

In 2013 respondents were asked about trusting particular types of organisation with their personal details. As shown in Figure 45 below, a majority of internet users who visit government/ council websites agree that they trust them to hold their personal information securely (61%) , and one in five (22%) disagree.

Similarly, a majority of internet users who buy things from websites or apps trust these websites to hold their personal information securely (59%), while one in five (21%) disagree.

Figure 45: Agreement with statement: "I trust government/ council websites to hold my personal information securely": 2013



IN37C Please tell me to what extent you agree or disagree with some things that other people have said about the internet (prompted responses, single coded)

Base: Adults aged 16+ who use the internet at home or elsewhere and responded regarding government or council websites (1136 in 2013, 193 aged 16-24, 231 aged 25-34, 229 aged 35-44, 180 aged 45-54, 174 aged 55-64, 129 aged 65+, 305 AB, 366 C1, 215 C2, 250 DE, 554 males, 582 females) - Significance testing shows any difference between any age group or socio-economic group and all adults and between males and females
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Half of internet users think that people who buy things online put their privacy at risk

However, over half of internet users (54%) aged 16+ agree with the statement: "people who buy things online put their privacy at risk". The difference by age of those who agree with the statement ranges from 45% of 16-24s to 64% of over-65s.

6.3 Awareness and use of security features

This section looks at internet users' awareness and use of different security measures, the incidence of any negative online experiences, and behaviour in relation to online safety and security.

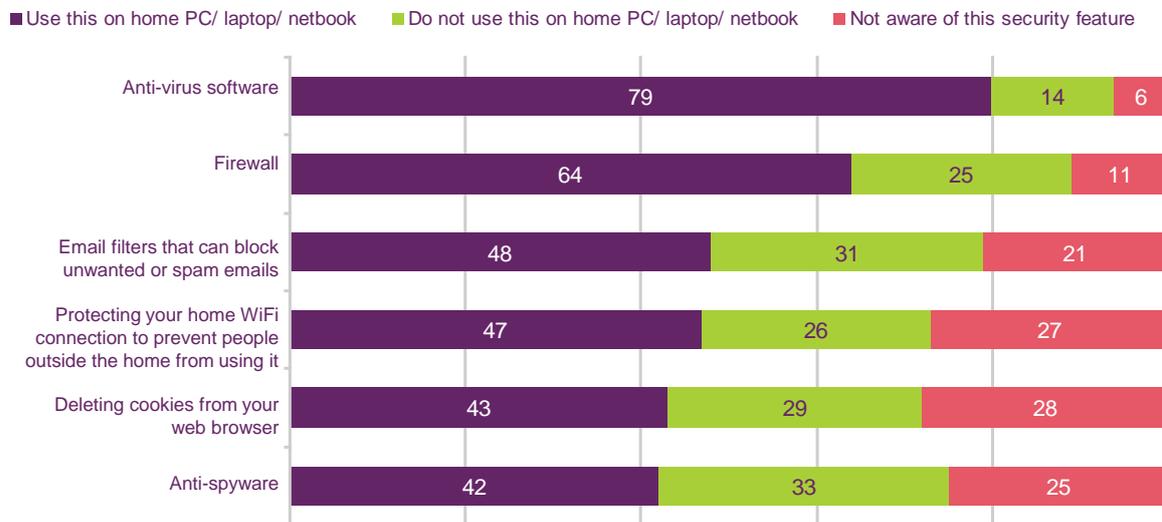
Awareness is high for online security measures on PCs/ laptops/ netbooks

As shown in Figure 46 below, the majority of internet users who go online at home through a PC/ laptop/ netbook are aware of the online security measures they were asked about. Awareness and use is higher for anti-virus software and firewalls and lower for email filters, home WiFi protection, deleting cookies from browsers and anti-spyware.

Eight in ten (79%) say they use anti-virus software and over six in ten (64%) use firewalls. While only relatively few of those that are aware of anti-virus software choose not to use it (14%), this is not the case for the other features, where awareness does not translate into use.

The 25-34s are the only age group less likely than all internet users to say they use anti-virus software (70% vs. 79%).

Figure 46: Awareness and use of online security measures/ features: 2013



IN7/ IN8 Before today, which, if any, of the following online security measures or safety features had you heard of? And which if any, of those measures or features do you have or use on the PC/ laptop / netbook that you use at home? (prompted responses, multi-coded)

Base: Adults aged 16+ who use the internet at home on a PC/ laptop/ netbook (1202)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Those aged 65+ are significantly less likely than all internet users to be aware of all six security measures and as such are less likely to use three of them: email filters to block unwanted or spam emails (34% vs. 48%), to protect the home WiFi connection (34% vs. 47%) or to delete cookies (27% vs. 43%).

Those living in DE households are less likely than all adults to be aware of three security measures, and are therefore less likely to use a firewall (56% vs. 64%), to use email filters (36% vs. 48%) or to use anti-spyware (32% vs. 42%).

However, the most common variation in awareness and use of online security features is gender-based. Males are more likely than females to use almost all online security features including firewalls (69% vs. 58%), email filters (53% vs. 43%), protecting the home WiFi connection (52% vs. 43%), deleting cookies (49% vs. 38%) and anti-spyware (50% vs. 34%). For each of these features females are less likely to be aware of them.

Four in ten internet users say they have received spam or unwanted emails

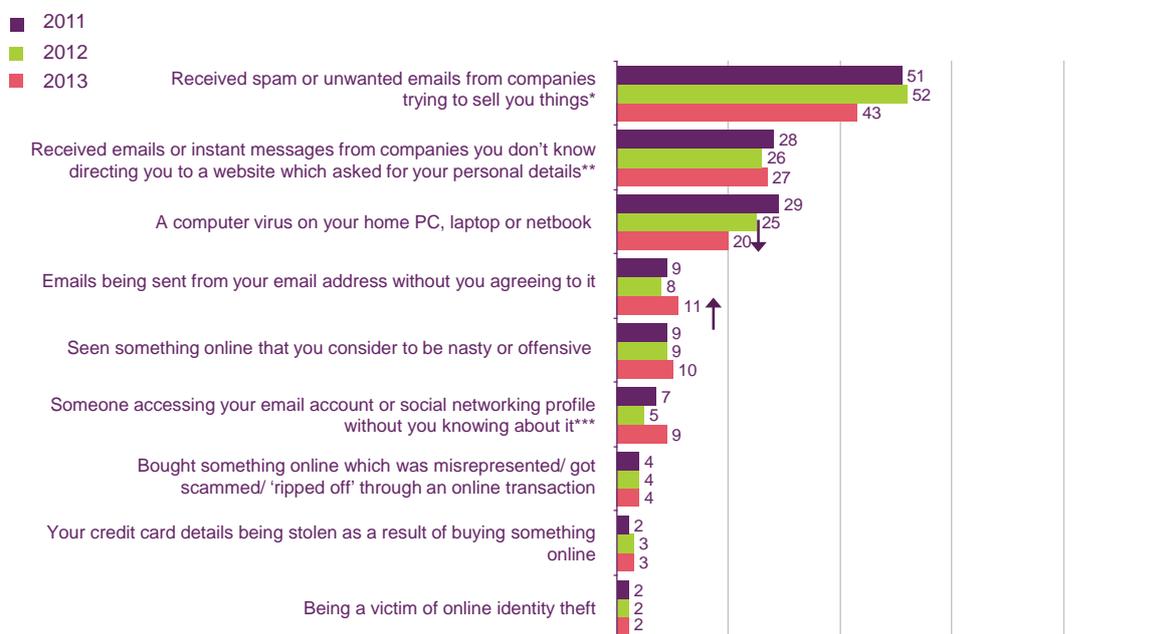
We asked respondents to say whether they had experienced a variety of possible 'negative' online activities in the past year, such as receiving spam or unwanted email or getting a computer virus.

Four in ten (43%) internet users say they have received spam/ unwanted emails from companies trying to sell things. As shown in Figure 47 below, three in ten (27%) say they have received contact from companies they don't know asking for personal details / 'phishing', with one in five (20%) getting a computer virus.

All other 'negative' online activities asked about were experienced by around one in ten, or less.

Where it is possible to make a comparison with 2012, internet users are less likely to say they have had a virus on their home computer (20% vs. 25% in 2012) and are more likely to say they have had emails sent from their email address without agreeing to it (11% vs. 8% in 2012).

Figure 47: Experience of 'negative' online events in the past 12 months: 2011-2013



IN9 – Which, if any, of the following have you personally experienced in the last 12 months? (prompted responses, multi-coded) * in 2012 this read 'Received spam or unwanted emails', ** In 2012 this read 'Received unsolicited email or instant messages directing you to a website which asked for your personal details', *** In 2012 this read 'Someone accessing your email account without authorisation'
 Base: Adults aged 16+ who use the internet at home or elsewhere (1369 in 2011, 1381 in 2012, 1272 in 2013).
 Significance testing shows any change between 2012 and 2013 where it is possible to make a comparison
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Although over-65s who go online at home through a PC/ laptop or netbook are less likely to have some online security features installed, they are also less likely to report having experienced six of the nine events we asked about.

In contrast, 79% of those aged 16-24 who go online through a PC/ laptop or netbook use anti-virus software, but this group is more likely than all internet users to say they have experienced a computer virus in the past 12 months (28% vs. 20%). Similarly, almost half of 16-24s who go online through a PC/ laptop or netbook use email filters (45%) and again, are more likely than all internet users to experience emails being sent without their consent (17% vs. 11%).

Similarly, despite males being more likely than females to have security features installed on the PC/ laptop or netbook they use at home, they are more likely than females to report experiencing a computer virus (23% vs. 17%) or having emails sent without their consent (13% vs. 9%).

These findings may reflect how awareness and use of security features, as well as attitudes to risk, are linked to depth and breadth of internet use.

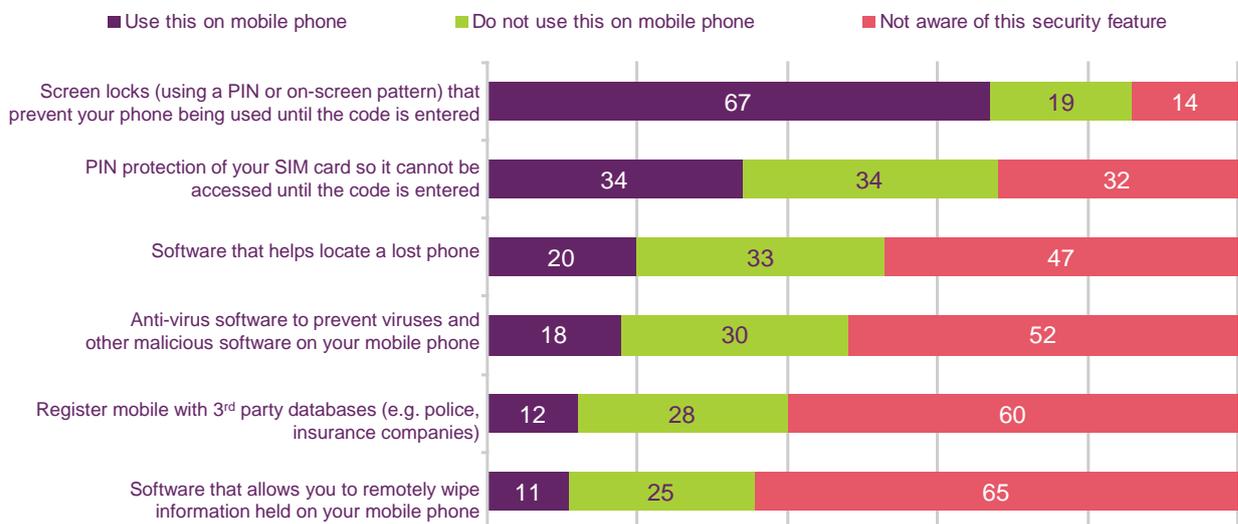
Only one mobile security feature is used by the majority of mobile users

We asked mobile phone users about the security features they might be aware of and use on their phones. As shown in Figure 48, there are three types of mobile security feature that a majority of mobile phone users say they are aware of: screen locks (86%), PIN protection of SIM cards (68%), and software to help locate a lost phone (53%).

However, only one feature is actually used by a majority of mobile phone users: screen locks (67%). The next most popular security feature used is PIN protection of the SIM card, used by one in three (34%).

One in five mobile users use software to help locate a lost phone (20%) or anti-virus software (18%), while one in eight have registered their phone with third-party databases (12%) and one in ten use software to remotely wipe information held on their phone (11%).

Figure 48: Awareness and use of mobile security measures/ features: 2013



M5/ M6 Before today, which, if any, of the following mobile phone security measures or safety features had you heard of? And which if any, of those measures or features do you have or use on your mobile phone? (prompted responses, multi-coded)

Base: Adults aged 16+ who use a mobile phone (1465)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Compared to all mobile users, use of screen locks is significantly lower for mobile users aged over 55 (53% for 55-64s, 39% for 65-74s and 31% for over-75s, compared to 67% for all mobile users).

SIM card PIN protection is used by 13% of mobile users aged 65-74 and 6% of those aged 75+, compared to 34% of all mobile users. Only 9% of 55-64s, 3% of 65-74s and 1% of over-75s use software to locate a lost phone, compared to 20% of all mobile users.

Anti-virus software for mobiles is used by 10% of 55-64s, 5% of 65-74s and 3% of over-75s, compared to 18% of all mobile users. This trend continues; 5% of 65-74s and 3% of over-75s register a mobile with a third-party database, compared to 12% of all mobile users, and 2% of those aged 55+ use software to remotely wipe information, compared to 11% of all mobile users.

Again, a gender difference is evident in relation to the use of mobile security measures. Males are more likely than females to use SIM card PIN protection (37% vs. 31%), software

to locate a lost phone (25% vs. 16%), anti-virus software (22% vs. 14%) and software to remotely wipe information (15% vs. 7%). For each of these mobile safety features, females are less likely to be aware of them.

There has been a decline in mobile users saying they have received targeted advertising

Regarding negative experiences using mobile phones, around one in five of all mobile phone users (18%) say they have received targeted advertising to their phone based on their location in the past 12 months. This represents a four percentage point decrease, from 22% in 2012.

A very small proportion of mobile phone users (2%) have experienced viruses, trojans or malware on their mobile phone, or have had an application recalled remotely by the provider due to security issues (1%), in the past 12 months.

Half of internet users skim-read terms and conditions

One in five internet users say they read website terms and conditions/ privacy statements thoroughly (22%) with close to half (47%) saying they skim-read them. One in five (21%) say they don't read them. Reading them thoroughly is more likely among those aged 65+ (34% vs. 22%), while 16-24s are more likely to say they don't read them (31% vs. 21%).

The majority of internet users use the same password for most websites

There has been no change since 2012 in attitudes towards online passwords. A majority of internet users (57%) continue to say they use the same passwords for most if not all websites. More than one in four (28%) say they tend to have problems remembering passwords, or that they use easy-to-remember passwords (27%).

In 2013, 45-54s are more likely (compared to all internet users) to say they tend to have problems remembering passwords (37% vs. 28%) while C1s are less likely to say this (20% vs. 28%).

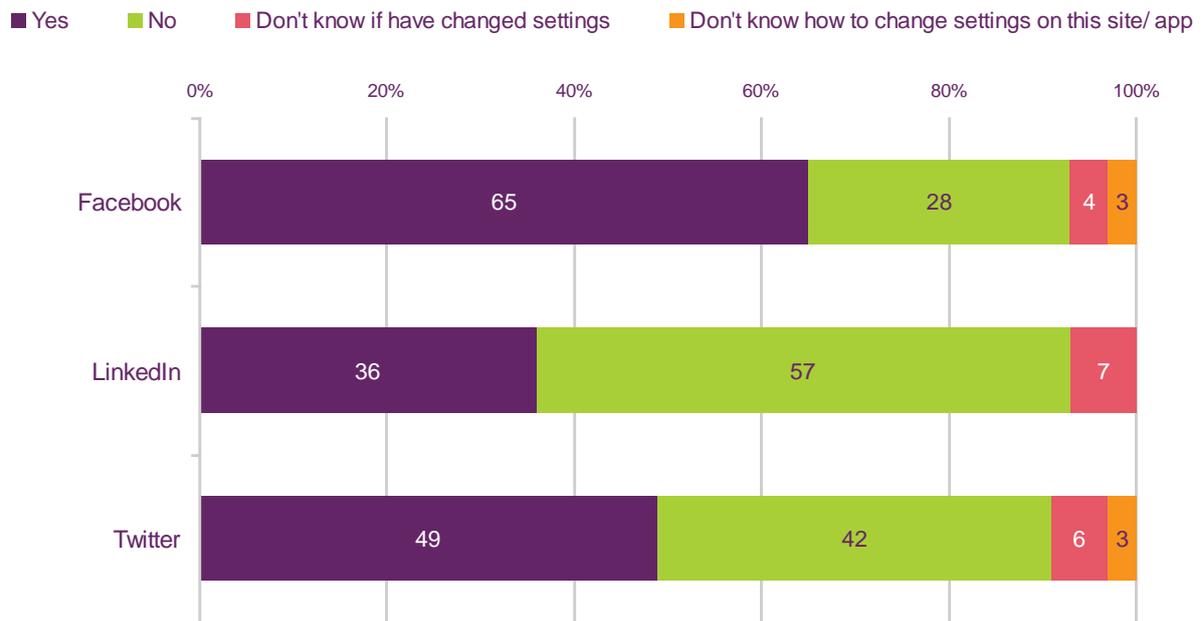
The majority of Facebook users have made their profiles more private

Social networking sites are based around the concept of people sharing content and information, and as such there may be a tension between managing privacy settings and using social networking sites to their full potential.

Figure 49 shows that a majority (65%) of Facebook users say they have changed their privacy settings from the original default privacy settings to make them more private. Around half of Twitter users (49%) have also done this, while this is less likely for those with a LinkedIn profile (36%).

Making the privacy settings on Facebook more private is more likely among 16-24s (76% vs. 65%) and less likely for those aged 45+ (50% vs. 65%). Only a small minority of Facebook users say they don't know how to do this (3%) and over-45s are more likely than all Facebook users not to know how to do it (7%). Male Facebook users are more likely than females to say they have not changed their privacy settings to make them more private (34% vs. 23%).

Figure 1: Changing social networking profile privacy settings to be more private: 2013



Q11. Have you changed the privacy settings to be more private from the original default setting for the social networking sites or apps that you have profile on? So for... (prompted responses, single coded)
 Base: Adult internet users aged 16+ with a current social networking site profile on Facebook (653), LinkedIn (105), Twitter (232)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

One-third of social networkers have blocked someone on social networks

Internet users with a current social networking site profile were asked about a number of actions that can be taken to help manage privacy on social networks. Figure 50 below shows that one in three (36%) have blocked or deleted a friend /contact/ follower in the past 12 months.

Over the past year, one in four (25%) have sent messages to a specific contact group rather than all their friends, or have deleted a comment that they had posted (24%). Around one in five have deleted a photo they had posted (22%), or posted a comment that could be seen by anyone (20%). One in ten (9%) have reported inappropriate or offensive content.

There are some differences by age; 16-24s are more likely than all social network users to have blocked or deleted a friend/ contact or follower (49% vs. 36%) or to have deleted a photo (32% vs. 22%) while both these activities are less likely among those aged 45+.

Figure 50: Activities undertaken on social networking sites in the past 12 months: 2013



Q12. In the last 12 months, have you done any of these things on any of the social networking sites or apps you use? (prompted responses, multi-coded)

Base: Adult internet users aged 16+ with a current social networking site profile (679)

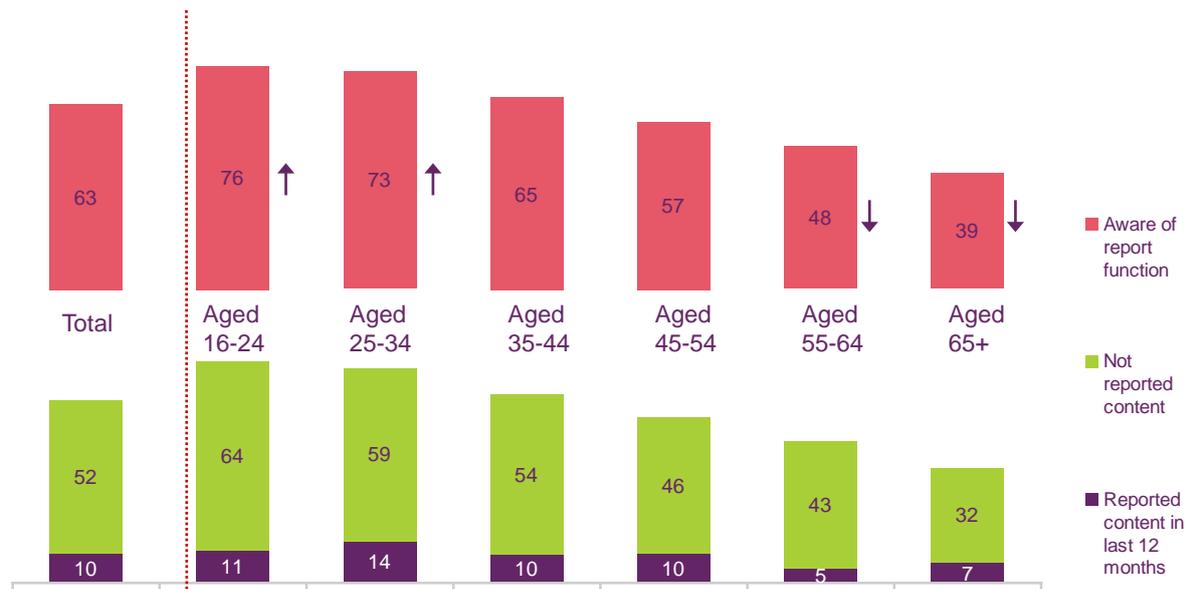
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

The majority of internet users know how to report inappropriate or offensive content but only a minority have done so in the past 12 months

As shown in Figure 51 below, the majority of internet users (63%) are aware that they can report inappropriate or offensive content on many websites. Awareness of this function is higher among 16-24s (76%) and 25-34s (73%) and lower for 55-64s (48%) and those aged 65+ (39%). One in ten (10%) have reported content in this way in the past year and this incidence does not vary by age.

Awareness of the reporting function differs by socio-economic group. Compared to all internet users, those living in AB households are more likely to be aware of this function (71% vs. 63%) while DEs are less likely to be aware (50% vs. 63%).

Figure 51: Awareness and use of report function for inappropriate or offensive online content, by age: 2013



Q25. If you were to see something online that you found inappropriate or offensive, are you aware that many websites have a function to report this to the website? The report function could be a button, a link on a web page, or even an email address through which you can point out the inappropriate or offensive content (spontaneous responses, single coded)/ Q26. Have you reported anything in this way on a website or app in the last 12 months? (spontaneous responses, single coded)Base: Adult internet users aged 16+ (1032 total, 185 aged 16-24, 196 aged 25-34, 214 aged 35-44, 151 aged 45-54,145 aged 55-64, 141 aged 65+) - significance testing shows any difference by age compared to all adultsSource: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Four in ten app users know how to complain about apps

Four in ten (39%) app users say they know who complain to about an app they have downloaded, while more than four in ten (44%) wouldn't know whom to contact and one in six (17%) say they are unsure.

Males are more likely than females to say they know who to contact (47% vs. 32%) and those whose main device for using apps is a smartphone are more likely than those whose main device is a tablet to say they know whom to contact (41% vs. 28%).

7 New, narrow and non-users

This section looks at how the online attitudes and behaviours of three distinct groups of people:

- New users of the internet - those who say they first started using the internet less than five years ago
- Narrow users of the internet - those who make the fewest different types of online uses
- Non-users of the internet - those who do not use the internet at home or anywhere else.

It covers how newer users and narrow users use the internet, in terms of volume, location, types of use made, their confidence in using the internet and in understanding of how search engines operate, and the extent of their security and privacy concerns.

To complete the picture, we consider the incidence of non-users within the UK adult population, over time and by demographic group, and make comparisons between the demographic profiles of internet users and non-users in 2013. In addition to looking at the extent to which non-users have made proxy use of the internet, we also assess the reasons given by those who do not have, and do not intend to get, access to the internet at home, as well as the extent to which non-users are interested in particular internet functions.

A comprehensive chart pack of all the findings in this section, including by age and demography, can be found at www.ofcom.org.uk/medialiteracyresearch.

7.1 Section overview

- Just over one in ten (12%) internet users are newer users of the internet.
- One in six (17%) of all internet users are narrow users of the internet. This figure is the same as 2012 but has fallen since 2009, when almost three in ten internet users were narrow users (28%).
- Older internet users (aged 55-64 or 65+), those living in DE households and females are more likely to be narrow users. They are also more likely to be newer internet users.
- Just over one in ten (12%) adults do not have access to the internet at home and say they don't intend to get it in the next 12 months. This is a decrease from 15% in 2012.
- In 2013 over a quarter of non-users made a proxy use of the internet. This represents an increase since 2012 (from 18%).
- 'Cost' and 'ownership/availability' have increased as reasons for not having the internet at home, but lack of interest remains the most-mentioned reason.

7.2 Newer users

No change in the number of newer users of the internet

Just over one in ten (12%) internet users are newer users of the internet; this is unchanged since 2012.

Internet users aged over 65 (21%) and those living in DE households (20%) are more likely to be newer internet users, compared to all internet users (12%).

Newer users have a lower estimated weekly volume of use compared to established users (12.4 vs. 17.6 hours). While this difference among newer users is due to a lower volume of use at home (9.2 vs. 11.5 hours) and in the workplace/ place of education (1.7 vs. 4.4 hours), the volume of use anywhere else is no different to that of established users.

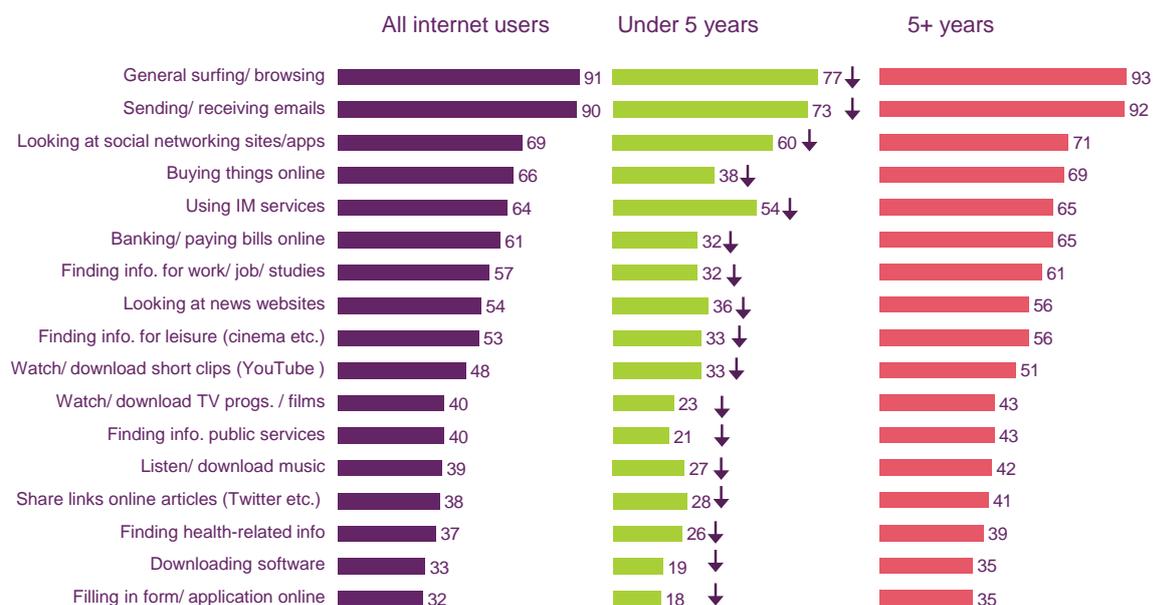
With regard to devices used to go online, newer users are less likely than established users to go online using mobile phones or smartphones (54% vs. 74%), or tablets (18% vs. 39%).

Of the 34 online activities that internet users were asked about, newer users are less likely to undertake 28 of them at least quarterly, compared to more established internet users.

Only four online activities are undertaken by a majority of newer users on a quarterly basis. Just over three-quarters go online for general surfing or browsing (77%) compared to 93% of more established users. Just under three in four (73%) newer users send or receive emails at least quarterly (compared to 92% for more established users).

As illustrated in Figure 52 below, there is a less marked difference between newer users and more established users for two activities undertaken at least quarterly by the majority of newer users: social networking and instant messaging (IM). Six in ten (69%) newer users look at social networking sites (60%) compared to 71% of more established users, and just over half (54%) of newer users use IM, compared to 65% of more established users.

Figure 52: Online activities undertaken at least quarterly, by newer and more established users: 2013



IN17/ 18 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded)

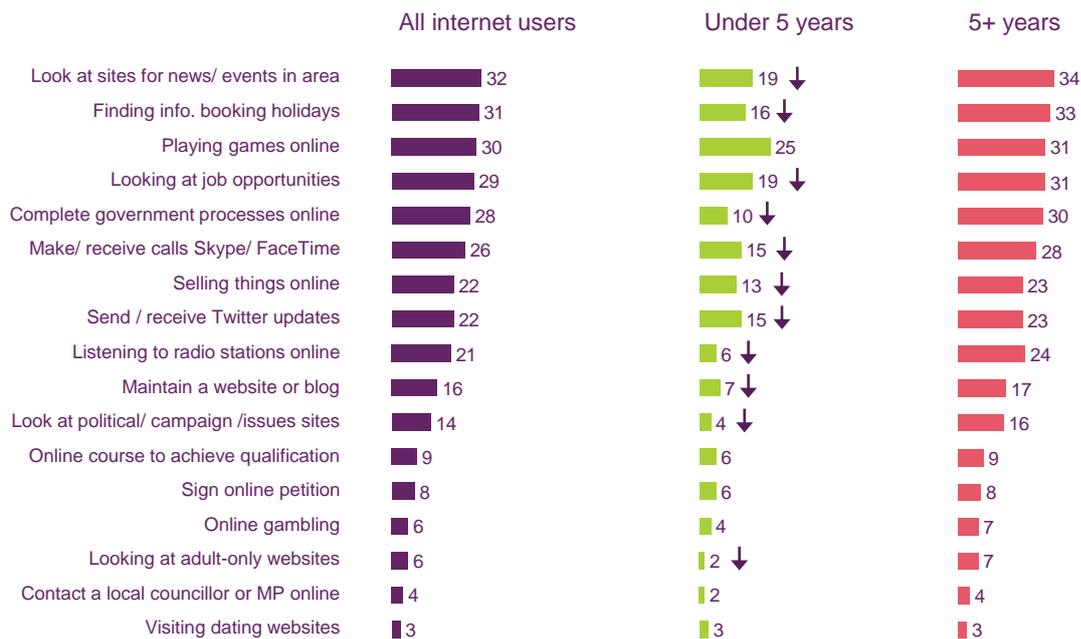
Base: All adults aged 16+ who use the internet at home or elsewhere (1272), started using under 5 years ago (179), 5+ years ago (1047). Significance testing shows any differences between newer and more established internet users.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 53 below reflects some of the findings reported earlier in relation to the increase in online gaming (Figure 7), with a much less marked difference between newer and more established users for playing games online (25% vs. 31% for more established users).

In contrast, more established users are almost twice as likely as newer users to buy things online at least quarterly (69% vs. 38% for newer users) and to bank online (65% vs. 32% for newer users). More established users are three times more likely than newer users to complete government processes online (30% vs. 10% for newer users) and four times more likely to listen to radio stations online (24% vs. 6% for newer users).

Figure 53: Online activities undertaken at least quarterly, by newer and more established users: 2013



IN17/ 18 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1272), started using less than 5 years ago (179), 5+ years ago (1047). Significance testing shows any differences between newer and more established internet users.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Newer users are almost twice as likely as established users to say that they only use websites that they’ve used before

A key difference between newer users and more established users is evident in relation to visiting new websites (those they have not used before). Newer users are almost twice as likely as established users to say that they only use websites that they’ve used before (57% vs. 31%). Almost half (49%) of newer users visit only between one and four websites in a typical week, compared to less than one in five (19%) established users who make this narrow level of internet use.

Newer users are less confident as internet users compared to established users

This difference in frequency and breadth of use between newer users and established users is also reflected in their levels of confidence. At an overall level, just over six in ten (63%) newer users say they are confident as an internet user, compared to nine in ten established users (89%). Half of newer users (50%) say they are confident using the internet for creative things, compared to 75% of established users, and there is a similar picture for confidence in judging whether or not to trust the content on websites (57% of newer vs. 78% of established users).

Newer users are less likely than more established users to be aware of how search engines operate, and are more likely to think that results returned will be accurate and unbiased.

The lack of confidence is also evident in newer users' security concerns. They are more likely than established users to say they wouldn't enter personal details online because of such concerns. They are also more than twice as likely as established users not to trust any site to be secure (12% vs. 5%).

Given the relatively high levels of mistrust by newer users and their relatively low levels of confidence, it is interesting to note that they are significantly less likely than established users to have security features installed on the PC/laptop they use at home, although this is due to lower levels of awareness about these features compared to more established internet users.

Despite this, newer users say they are less likely than established users to have experienced some types of negative online activity in the past 12 months, as shown in Figure 54. This may suggest that the incidence of experiencing negative types of online activity increases with depth and breadth of use, rather than lack of experience or confidence. However, it may also be linked to the relatively limited online activities of newer users.

This reflects the finding that older people are less likely than all internet users to have these features installed.

Figure 54: Experience of negative types of online activity, by newer and more established users: 2013



IN9 – Which, if any, of the following have you personally experienced in the last 12 months? (prompted responses, multi-coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1272 aged 16+, 179 first used the internet less than 5 years ago, 1047 first used the internet 5 or more years ago). Significance testing shows any difference between newer and more established users.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

7.3 Narrow users

In order to assess the breadth of use of the internet, 32 of the 34 individual internet activities referenced in Figure 11 were grouped into 18 types²⁰ of online use ever made by internet users. Internet users have been categorised into narrow, medium and broad users of the internet, depending on how many of these 18 types of use they ever make.

This division into narrow, medium and broad users was first undertaken in the 2009 report and was achieved by dividing equally the frequency counts for the 18 categories of use into the three 'breadth of use' groups. 'Narrow' users were defined as those ever carrying out 1-6 of the 18 types of online use, 'medium' users were defined as those ever carrying out 7-10 types, and 'broad' users were defined as those ever carrying out 11-18 types. These definitions have been carried forward for each of the subsequent surveys.

In 2013, one in six (17%) of all internet users are narrow users according to the definition above. This figure is the same as 2012, but has fallen significantly since 2009 when almost three in ten internet users were narrow users (28%).

Compared to all users, older users (aged 55-64 or 65+), those living in DE households and females are more likely to be narrow users. They are also more likely to be newer internet users; 46% of newer users are narrow users compared to only 12% of more established users.

Similar to newer users, narrow users have a lower estimated volume of weekly internet use compared to all users (7.0 hours vs. 16.9 hours) due to their having a lower volume of use at home, at work/ place of education and anywhere else.

In many ways, narrow users display the same attitudes and behaviours as newer users: six in ten (60%) say they only use websites they have used before, compared to 57% of newer users and 34% of all users. As with newer users, half (51%) of narrow users only use one to four different websites in a typical week.

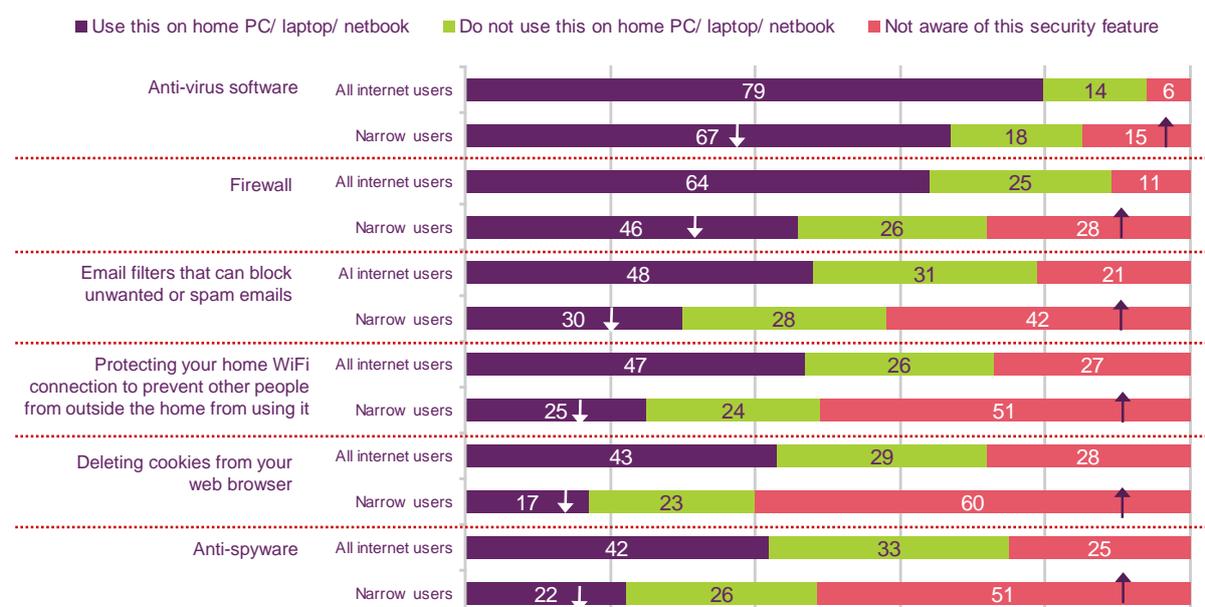
²⁰ Information (personal): finding information for booking holidays or for leisure time, looking at news websites or apps or adult-only websites, [added in 2010] visiting dating websites, looking at websites for news about, or events in your local area or the local community [added in 2012] / Email: sending and receiving emails / Buying and selling: buying things online / selling things online/ Government sites: completing government processes online (e.g. tax credits, driving licence, car tax, passport, tax return) or finding information about public services provided by local or national government / Information (work / college / school) : finding information for work/ job/ studies, [added in 2010] doing an online course to achieve a qualification or looking at job opportunities / Health: finding information about health-related issues / Banking/ paying bills: banking and paying bills online / Social networking sites: looking at social networking sites or apps or [added in 2011] send or receive Twitter updates or [added in 2013] sharing links to websites or online articles - perhaps on Twitter, Facebook, Reddit or LinkedIn / Downloading software: downloading software/ Communications: using instant messaging such as Facebook Chat, MSN Messenger or Skype Chat (amended in 2013) or [added in 2010] making or receiving calls telephone or video calls using services like Skype or FaceTime (amended in 2013) / Watching video clips/ webcasts: watching online or downloading short video clips such as music videos or comedy clips / Music: listening to or downloading music online / Watching TV content: watching online or downloading TV programmes or films / Radio: listening to radio stations online / Civic involvement: looking at political or campaign or issues websites, [added in 2011] sign an online petition or contact a local councillor or your MP online / Games: playing games online / Uploading/ adding content to the internet: maintaining a website or blog / Online gambling: online gambling

Compared to all internet users, narrow users are much less likely to say they are confident internet users (59% vs. 86% for all users). Narrow users are less likely to be aware of how search engines operate, compared to all users, with three in ten saying that if a website has been listed by a search engine it will be accurate and unbiased (30% compared to 22% of all users) and less than half correctly believing that some websites will be accurate and unbiased and some won't (47% vs. 59% of all users). Narrow users are much less likely than all users to say they are happy to enter personal details online, and are more likely to say they wouldn't enter such details because of security concerns.

Narrow users' low levels of confidence are also evident in the judgements they make about websites. Narrow users are more than twice as likely as all internet users not to trust any site to be secure (15% vs. 6% for all users). Narrow users are also less likely to make a judgement about a website compared to all internet users (58% vs. 79% for all users) and are more likely not to make a judgement about a website (16% vs. 11%).

Similar to newer users, narrow users are less likely to be aware of, and therefore to have installed security measures on the PC/ laptop used at home, as shown in Figure 55 below.

Figure 55: Security measures/ safety features installed on PC/ laptop used at home by narrow users: 2013



IN7/ IN8 – Before today, which, if any, of the following online security measures or safety features had you heard of?/ For each of these measures or features you had heard of, could you please choose one option from the card to say whether or not you have or use this on the computer that you use at home? (prompted responses, single coded)

Base: Adults aged 16+ who use the internet at home through a PC/ laptop/ netbook/ tablet (1272 aged 16+), narrow users (248). Significance testing shows any difference between narrow users and all internet users.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Narrow users are significantly less likely than all users to have experienced any negative types of online activity in the past 12 months, as is the case for newer users. As illustrated in Figure 56 below, narrow users are less likely to say they have seen something online that they consider nasty or offensive (2% vs. 10% for all users). They are almost three times less likely than all users to say they have received emails directing them to websites asking for personal details (10% vs. 27% for all users) and they are only half as likely to say they have received spam (22% vs. 43% for all users) or had a computer virus (8% vs. 20% for all users).

Figure 56: Experience of any negative types of online activity, narrow users: 2013



IN9 – Which, if any, of the following have you personally experienced in the last 12 months? (prompted responses, multi-coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1272 aged 16+, 248 narrow users).

Significance testing shows any difference between narrow users and all internet users.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

7.4 Non-users

To complete the picture of the digital landscape, it is important to include those who do not use the internet at home or anywhere else. In addition to providing measures of non-users over time and by demographic group, we can compare the demographic profiles of internet users and non-users in 2013.

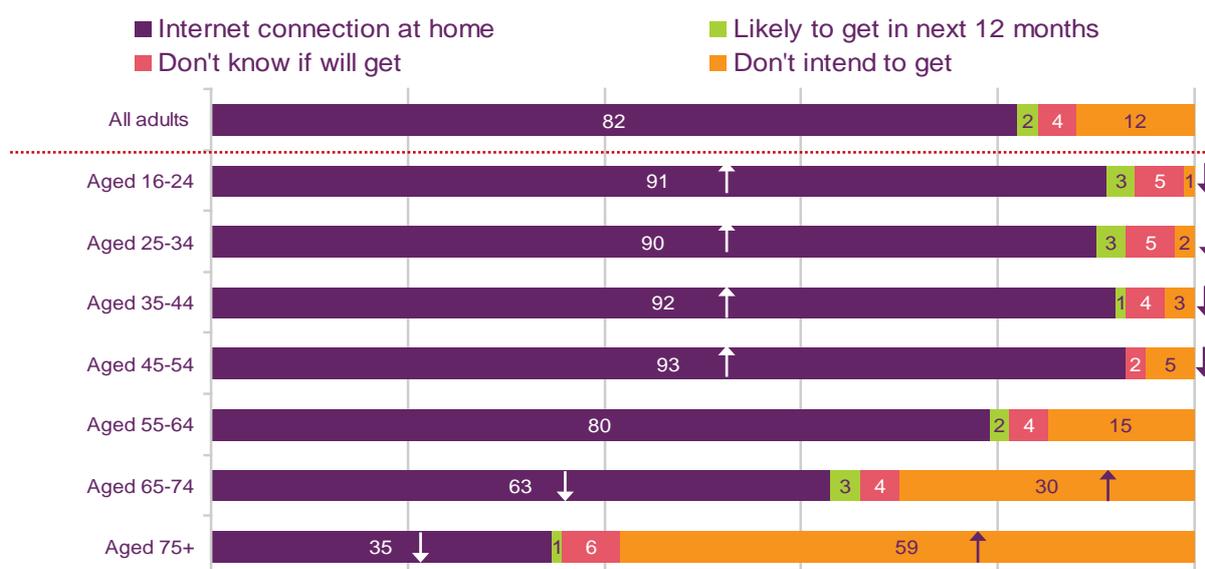
Non-users are not necessarily completely without internet interaction; some non-users make proxy use of the internet through other internet users, and we look at the incidence of this proxy use. Finally, we assess the reasons given by those who do not have and do not intend to get access to the internet at home, as well as the extent to which non-users are interested in particular internet functions.

One in eight say they don't have access to the internet at home and don't intend to get it

There has been a decrease since 2012 in the proportion of adults who don't have access to the internet at home through a PC/ laptop/ netbook and say they don't intend to get internet access at home in the next 12 months (from 15% to 12% in 2013). This is the first decrease since 2011.

Having an internet connection at home is lower among older adults (65+) and DEs while the intention of not getting the internet at home in the next 12 months is higher for both these groups. As shown in Figure 57 below, while three in ten of those aged 65-74 don't intend to get the internet at home in the next twelve months, this doubles to six in ten (59%) for those aged 75+.

Figure 57: Internet take-up and intentions, by age: 2013



IN1/ IN12 – Do you or does anyone in your household have access to the internet at home through a laptop or computer?/ Can you tell me if you intend to get internet access at home in the next year or so?

Base: All adults aged 16+ (1642 aged 16+, 224 aged 16-24, 260 aged 25-34, 270 aged 35-44, 226 aged 45-54, 262 aged 55-64, 211 aged 65-74, 189 aged 75+). Significance testing shows any difference between any age group and all adults aged 16+

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Over a quarter of non-users have made proxy use of the internet.

In 2013 over a quarter of non-users made proxy use of the internet. This represents a nine percentage point increase: to 27% from 18% in 2012.

However, more than four in five non-users (82%) said they were not interested in going online for any of the purposes we asked them about, suggesting that the increase in proxy use does not necessarily equate to an interest in going online in the future.

Of the internet functions that non-users were asked about, 8% said they were interested in contact with friends and family and 7% were interested in buying things online.

Despite both 'cost' and 'ownership/availability' increasing as reasons for not intending to get the internet at home, lack of interest remains the most-mentioned reason

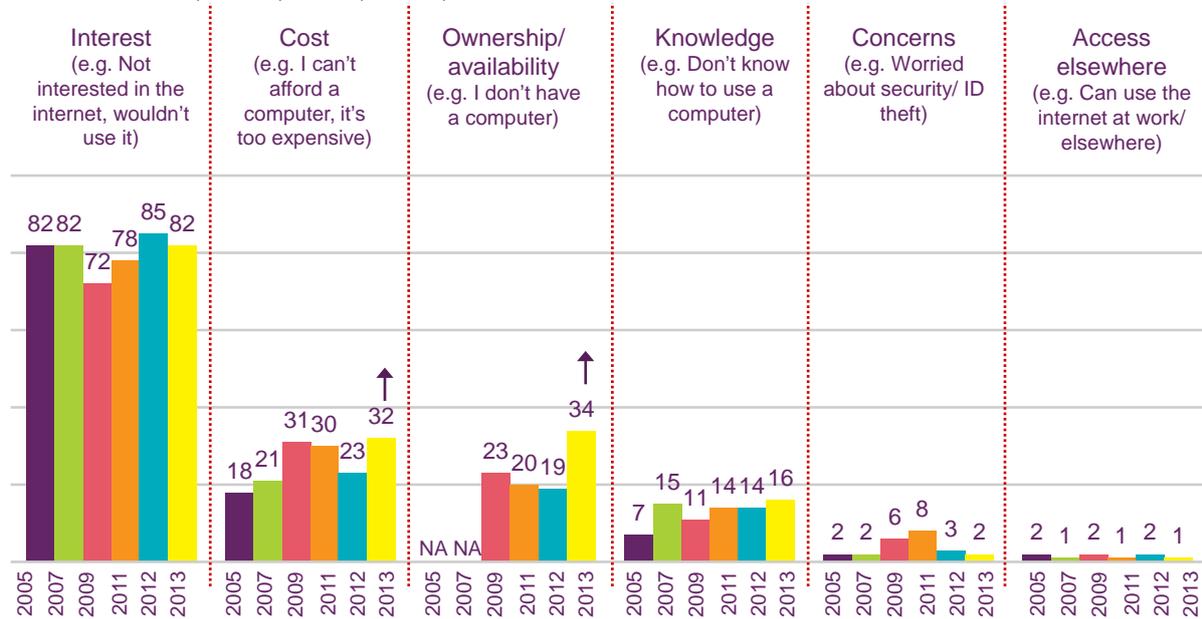
Those who do not intend to get the internet at home were asked to say why, without any prompting, and were allowed to nominate as many reasons as applied to them. Figure 58 shows a summary of the reasons given by those who do not intend to get the internet at home in the next 12 months.

As in previous years, most (82%) give reasons relating to a lack of interest. The next most likely reason for not intending to get internet access relates to cost (32%), which has increased from 23% in 2012. 'Ownership/ availability' as a reason has also increased since 2012; from 19% to 34%.

Despite the increase in nominating 'cost' as a reason for not getting internet access at home, a proportion of respondents may not feel comfortable nominating this particular reason. Also,

as in previous years, those stating 'lack of interest' as a reason could be masking those who do not intend to get the internet at home for various underlying reasons such as a lack of experience or a lack of confidence regarding the internet, or a combination of such factors.

Figure 58: Stated reasons for not intending to get home internet access in the next 12 months: 2005, 2007, 2009, 2011, 2012 and 2013



IN13— Can you tell me what your reasons are for not getting internet access at home? (Unprompted responses, multi-coded (Unprompted responses, single coded)
 Base: All adults aged 16+ who do not intend to get internet access at home (930 in 2005, 743 in 2007, 410 in 2009, 328 in 2011, 305 in 2012, 267 in 2013). Significance testing shows any change between 2012 and 2013. Percentages may add to more than 100% as respondents can nominate more than one reason.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Adults were also asked to give their *main* reason for not getting internet access at home. In line with our findings in 2012, seven in ten (70%) gave a main reason relating to a lack of interest, with most others giving a main reason relating to cost (15%). Reasons relating to ownership/availability accounted for 5%, and 8% said 'knowledge' was the main reason.