Adults' media use and attitudes

Report 2015

Research Document

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About this document

This report is published as part of our media literacy duties. It provides data on adults' media use and attitudes across TV, radio, games, mobile and the internet, with a particular focus on online use and attitudes.

The research underpinning this report was first conducted in 2005 and so this year's report is our ten year anniversary edition. Therefore, although the bulk of the report focuses on the current wave of research conducted in autumn 2014 and any key changes compared to 2013, the first chapter draws upon themes over the last ten years.

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Section 1

Executive Summary

The *Adults' Media Use and Attitudes Report* gives detailed evidence on media use, attitudes and understanding among UK adults aged 16+. It covers TV, radio[1], mobile phones, 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.

The research underpinning this report was first conducted in 2005 and so this year's report is our ten year anniversary edition. Therefore, although most of the report focuses on the current wave of research conducted in autumn 2014 and any key changes compared to 2013, the first chapter (Section 3) looks particularly at changes over the last ten years. This summary therefore addresses both trends[2] and current[3] findings:

Digital media take-up[4] and use

Internet use and location

Trend **Over the last ten years internet use has increased substantially, both at home and elsewhere.**

Compared to 2005, there has been a 27 percentage point increase, and close to nine in ten adults now go online in any location (from six in ten in 2005). Estimated hours spent online per week have also doubled during this time, from around ten to over 20 hours.

Current **More adults are going online outside of the home.**

There has been an increase in the proportion of 65-74 year olds going online in any location (70% from 56%). There has also been an increase in the proportion of all adults citing that they go online both inside and outside of the home (with a decrease in solus home use), and in the total estimated volume of internet use.

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[1] Reporting on radio is currently restricted to media concerns and online consumption.

[2] Trends are defined as observations from the survey data over the last five to ten years i.e. 2005-14, 2007-14, 2009-14 or 2010-14, primarily using questions that have been asked consistently over time.

[3] 'Current' include three elements of reporting - 1) Statistically significant changes from 2013 to 2014, 2) Statistically significant demographic differences in the 2014 data, and 3) Questions that were asked for the first time in 2014.

[4] The take-up figures collected for this report give useful contextual information to understand better the behavioural and opinion-based findings about media literacy. Official all-UK Ofcom take-up figures based on a larger survey can be found in the annual CMR (Communications Market Report) published in August each year e.g. http://www.ofcom.org.uk/cmr14/

Internet use and devices

Trend

The computer (laptop/desktop/netbook) is still the primary device for accessing online content, but the use of alternative devices has increased substantially over the years.

The popularity of both smartphones and tablets over the past five years have driven this, with two thirds (66%) of adults now using the former, compared to 30% in 2010.

Current

Although smartphone take-up has slowed down compared to previous years, along with tablets they continue to influence how people go online both at home and elsewhere.

The proportion of adults citing smartphone use (66%) has not increased to a statistically significant level since 2013 (62%). However, almost all of these people (61% of adults) use a smartphone to go online at home, and most (51% of adults) do so outside of the home. This is the only device used to go online in both locations by a majority of adults. The tablet has continued to increase as a device used to access the internet (39% vs. 30% in 2013).

Despite this, alternative devices tend to supplement rather than substitute computer use, with just 6% only using other devices to go online at home or elsewhere. This incidence, however, rises to 10% among DEs.

Communication methods

Trend

Technology based communication methods such as texting, emailing, and instant messaging have become increasingly popular over the last ten years, particularly on mobile phones.

Text messaging is now almost universal among those under the age of 55 (at least 96% of mobile phone users in each age group do it at least once a week, compared to 70% overall in 2005). Furthermore, over half (52%) of mobile phone users are now emailing at least once a week on their device, compared to 5% in 2005; and regular instant messaging on any device has doubled from three in ten (30%) to six in ten (58%) internet users during this time.

Current

Eight of the ten communication methods asked about on a mobile phone have increased since 2013.

While text messaging has seemingly hit saturation point, email and instant messaging have continued to increase on mobile phones. As well as text based methods there have also been sizeable increases since 2013 in the use of VoIP calls (27% to 43%) and uploading videos and photos online (38% to 50%).

Social media

Trend

The use of social media has risen substantially over the years.

Nearly three quarters (72%) of internet users have a social media profile, compared to 22% in 2007. Furthermore, four fifths (81%) of these people use social media at least once a day; an increase from 30% in 2007.

Although 16-24s have always shown the highest levels of social media use compared to older ages, the most marked increase over the last eight years has been among the 35-44s - a 68 percentage point increase from 12% to 80%.

Current

The proportion of internet users who have a social media profile has increased since 2013, with half of those aged 55-64 now having one.

The 72% of internet users who have a social media profile represents an increase from 2013 (66%). This is driven by increases for females (from 67% to 74%) and 55-64s (from 33% to 49%); this age group is the only one except for aged 65+ (28%) where the minority have a profile.

Watching audio-visual content

Trend

Following the ubiquity of digital TV, and increased DVR ownership over the years, watching through a TV set still remains hugely popular. However, this is less true for younger people, and viewing is increasingly being done online.

While just one in ten (11%) adults had a DVR in 2005, around half now have one (51%). Along with this, the TV set has proved resilient over the last ten years - 37% say they would miss their TV set more than any other device in 2014. However, this differs substantially by age - from 17% of 16-24s to 68% of 75+ year olds - and for the younger age group it now comes a distant second to the mobile phone (which has risen from 28% in 2005 to 59% in 2014).

Over a quarter (27%) of internet users now watch TV or films online at least once a week, compared to one in ten in 2007, while watching video clips online has doubled during this time from 21% to 39%. Having been launched in 2005, YouTube is now cited by a third (32%) of internet users as an important source for information.

Although the laptop/netbook is the device used most often for watching TV or films online, close to a fifth cite a tablet, and a tenth a smartphone (rising to 18% among DEs)

Current

DVR ownership has remained stable, while online and mobile viewing has continued to grow in popularity.

Half of adults say they own a DVR in 2014 (51%), which is unchanged from 2013 (55%). However, the proportion of internet users citing watching TV programmes or films online at least once a week (27%) has increased since 2013 (22%).

Furthermore, watching TV programmes on a mobile phone has also increased both weekly (12% from 8%) and less frequently (18% from 13%). Weekly viewing of short video clips on a mobile has risen more substantially, from 29% in 2013 to 40% in 2014.

Gaming

Trend

Over the last ten years gaming has become more popular and increasingly mobile; driven by smartphones and tablets.

Since 2005, online and mobile gaming have both doubled in terms of weekly usage. The incidence of playing games on any device has increased since 2007, from 31% to 44%.

While those aged 16-24 are still the most active gamers (73%), the majority of those aged 25-44 now play games to some extent (62% vs. 44% in 2007 for 25-34s, and 51% vs. 37% in 2007 for 35-44s).

Current

Although the volume of gaming remains unchanged from the previous year, there has been an increase in doing so on a smartphone and tablet.

Over a quarter (26%) of adults say they ever play games on a smartphone, compared to 19% in 2013. While gaming on a tablet has increased from 10% to 15%, there have been decreases on both a console connected to a TV (17% from 24%) and a handheld games player (7% from 12%).

Other digital media activities

Trend

The majority of other online activities have increased over the last ten years …

There has been a noticeable increase in the use of the internet at least weekly for news (25% to 42%), and for banking and paying bills (31% to 42%).

…while other activities have remained static, or even decreased.

Weekly use of the internet for information relating to work or studies has seen a decrease from 52% to 45%, while searching for health information (16% in 2014) and maintaining a website or blog (8% in 2014) have remained at similar levels among internet users since 2005.

Current

Going online to undertake public or civic activities is more likely than it was in 2013.

All six individual public or civic activities asked about have increased since 2013. For example, seven in ten (69%) internet users ever complete governmental processes online compared to 61% in 2013. The increase in this activity is most substantial among 25-34s (61% from 77%).

As well as completing governmental processes, two other public or civic activities have now ever been undertaken by a majority of internet users: finding information about public services provided by local or national government (78%), and looking at websites/ apps for news about or events in the local area/ the local community (69%).

Although making transactions online has remained unchanged as a whole since 2013, use of a mobile phone for checking a bank balance or making purchases has increased.

A third (33%) of mobile phone users now check their bank balance on their phone at least weekly, compared to less than a quarter (23%) in 2013. Making purchases through their device has also increased from 10% to 15%.

A majority of mobile phone users now use their phone use for content searching and content creation.

The proportion of adults taking photos (54% from 48%) or videos (29% from 23%) at least once a week on a mobile phone have both increased since 2013.

Media attitudes and critical understanding

Media concerns

Trend

Despite having fallen considerably since 2005, concerns with content on the internet are still at higher levels than for other media.

There have also been decreases in concerns relating to TV content and mobile phones during this time among users. While violence (12%), bad language (9%) and sex (7%) are still prominent concerns for TV content, they have all roughly halved (23%, 17%, and 15% respectively). For mobile phones, the decrease in overall concern (from 42% to 24%) is chiefly driven by lower concern for health risks (4% vs. 21% in 2005).

The proportion of internet users citing any internet related concerns has decreased from seven in ten (70%) in 2005 to half (51%) with the most significant decrease by age being among 35-44s (from 80% to 54%).

Current

Concerns about media among users are broadly unchanged since 2013, though concerns about apps have increased.

Three in ten (28%) of those who use them now have any concerns with apps, compared to two in ten (20%) in 2013. This is driven by increases in concern for security/ fraud or privacy issues (20%) and offensive content (9%).

Half of internet users cite any concerns with the internet, and this is unchanged since 2013. Although concerns about offensive or illegal online content (38%) still dominate, those relating to risks to others/society have doubled from 15% to 28%. The top three specific concerns are content unsuitable for children (21%), strangers contacting children (19%) and sexual content/ pornography (18%).

Media funding

Trend

Awareness of how both types of TV channel (BBC and commercial) are mainly funded have been consistently high since 2005, but the former has fallen slightly over this time.

Awareness that BBC programmes are funded by the licence fee has decreased from 84% in 2005 to 78% in 2014.

In contrast, a minority have tended to be aware of how types of website are funded (BBC and search engines), but both have increased over time.

This is particularly the case for awareness of search engine funding, where correct responses applied to 45% of adults, nearly double the 2005 figure (25%).

Current

More adults are aware how commercial TV programmes and search engine websites are funded, compared to 2013.

The former has increased from 67% to 72%, and the latter from 36% to 45%. However, there has been no change in the proportion of adults who are able to correctly state how BBC TV programmes and the BBC website are funded.

Adults are less likely than they were in 2013 to agree that as long as the internet provides good websites it doesn't really matter who owns them or how they are funded.

Unlike in previous years, there is no clear consensus as to whether internet users agree overall (36%) or disagree overall (35%) with the statement. Those aged 25-34 (22%) are more likely to agree strongly than other age groups.

Media regulation

Trend

Awareness of regulation is higher for both TV and radio than it was in 2005. Although awareness for the former is higher than the latter, the increase for radio has been more substantial.

The proportion who believe that TV programmes are regulated has increased in the last ten years from 81% to 88%, while for radio it has increased from 59% to 79%.

Current

More adults are aware of broadcasting regulation than in 2013.

The proportions of adults who say that TV programmes (88% vs. 84%) and radio (79% vs. 72%) are regulated have increased since 2013.

Although most internet users feel that the internet needs to be regulated, opinions about freedom of expression are relatively balanced.

When asked "As far as you know, how much of what can be seen or read online is regulated?" one in ten (9%) said 'all' of it, with twice as many (20%) saying 'most of it'. Close to half (46%) gave the broadly correct response 'some of it', although this was much lower (24%) among those aged 75+.

Despite this, a majority agree strongly (58%) that it needs to be regulated (with a further 21% agreeing slightly).

Furthermore, internet users are more likely than in 2013 to strongly agree they must be protected from inappropriate or offensive content. This figure has increased from five in ten (51%) to six in ten (60%).

Despite this, a similar proportion of adults agree (40%) and disagree (39%) with the statement *"I should be free to say and do what I want online"*.

Confidence online

Trend

Nearly all internet users perceive themselves as confident in various aspects of using the internet, but the levels have remained similar over the years.

The proportion who agree that they are confident at finding things online has remained the same since 2007 (91% v 92%).

Current

There has been a decrease since 2013 in the proportion of internet users who cite confidence in using the internet to do creative things - from seven in ten to six in ten adults.

This is attributable to fewer people citing that they are 'very confident' in doing creative things like making blogs, sharing photos online, or uploading short videos to the internet (from 44% to 34%).

Understanding of search engine results

Trend and current

Opinions on the potential for inaccuracy or bias in search engine results have remained constant over the last five years, with little variance in age.

Six in ten (60%) adults believe that some websites will be accurate and unbiased, while others won't be. In contrast, two in ten (23%) say that if results are listed by the search engine, the websites must be accurate/unbiased. These figures remain similar to 2009 (54% and 20%).

Online privacy

Trend

The majority of internet users say they would share personal information online, but there is evidence of added caution in doing so over the ten years of tracking.

For example, six in ten (60%) internet users say they would give out their home address online but have concerns about doing so, compared to 46% in 2005.

Current

Adults have shown signs of being more privacy conscious since 2013.

Nine in ten (91%) internet users say they ever (always, often or sometimes) give the minimum amount of personal information required online, with over half of those aged 55-64 (54%) and aged 65+ (61%) citing that they always give the minimum.

More users say they would never provide their credit or debit card details (21% vs. 13% in 2013) or their mobile number (26% vs. 17% in 2013) because of security concerns. Furthermore, the percentage who are happy to provide personal details online has decreased for all types asked about except for email.

Six in ten Facebook users say they have changed their privacy settings to make them more private, while seven in ten (72%) say they only share their photos with friends. 'Friends only' was also cited by two-thirds of users in the case of sharing opinions about people, places or the latest news stores (66%), their real name (64%), and their current location (64%).

Despite this increased caution relating to privacy, internet users are more likely than in 2013 to say they don't read website terms and conditions or privacy statements at all (up from 21% to 26%). Furthermore, seven in ten (68%) say they are happy to provide personal information online to companies as long as they get what they want.

Online safety and security

Trend

The majority of internet users are using technical indications such as padlocks and system messages to measure website safety, and this has increased among adults over the age of 25 since 2005.

The increase from 43% in 2005 to 55% in 2014 has been driven by those aged 35 and over. For example, the figure for adults aged 45-54 has increased by 15 percentage points (from 43% to 58%)

Current

Four in ten internet users say they are 'very confident' they can stay safe online, and the majority are aware of, and use any online security measures.

Anti-virus software is used by three quarters (75%) and firewalls by 55% of internet users. Furthermore, the awareness (73% vs. 63%) and use (17% vs. 10%) of reporting functions for inappropriate or offensive content have both increased since 2013.

Despite this, two-thirds (64%) of internet users use the same passwords for most or all websites, and this is an increase since 2013 (from 57%).

Newer, narrow and non-users of the internet

As in previous years, the final section of the report analyses in detail the behaviour and attitudes of three groups of adults who are less familiar with using the internet. The following summarises the key findings:

Both newer (13%) and narrow users (11%) comprise around a tenth of the online population. There is significant overlap between the two groups – both are predominantly aged 65+ and DE, and share similar online behaviour and attitudes.

- Both groups of user cite a lower overall volume of internet consumption, as well as across the majority of online activities. Along with this comes a narrower range of websites used and lower confidence levels; newer users (52%) are twice as likely than established users (27%) to say they only use sites they have visited before.

- The level of understanding how search engines operate is more restricted for these types of internet user; as well as having higher uncertainty levels as to the accuracy of search engine results they are also more likely to believe that if it is listed by a search engine the results will have accurate and unbiased information.

- Both newer and narrow users are more likely to say they would never enter personal details on a website due to security concerns, but are also less likely to make judgements about whether a site is secure. Their awareness and use of security measures in general is lower than it is for those more familiar with the internet.

- However, the upshot of the above is that they are less likely to have cited experiencing any negative events such as receiving spam or unwanted emails, and are generally less concerned about what content is on the internet.

- Four in ten (39%) of newer users, and three in ten (28%) of narrow users believe that either all or most of what can be seen or read online is regulated. This compares to 29% among all users.

Fourteen per cent of adults in the UK are non-users of the internet, and this has remained stable since 2013. Six in ten are aged 65+ and half are from DE households.

- Three in ten non-users (31%) have asked someone to go online on their behalf in the past year, while one in ten say they will start to go online in the next year or so. Over half (52%) do not think there are any advantages to them being online.

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Section 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 maintain audience confidence in broadcast content; to promote opportunities to participate; 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 by communications services. Media literacy also helps people to manage content and communications, and to 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".

The key objectives of this research are:

- To provide a rich picture of the different elements of media literacy across the key platforms of the internet, television, radio, games and mobile phones.
- To identify emerging issues and skills gaps that help to target stakeholders' resources for the promotion of media literacy.

2.3 Research methodology and analysis

This report is designed to give a detailed but accessible overview of media literacy among adults aged 16 and over, with demographic analysis by age, gender and socio-economic group.

It draws on the data from the latest wave of the *Adults' Media Literacy Tracker* with adults aged 16 and over. The 2014 quantitative survey was conducted by Saville Rossiter-Base among 1,890 adults in-home using a CAPI (Computer Aided Personal Interviews) methodology between October and November 2014.

In the next section (Section 3 -Ten years: a retrospective), comparisons are made between the 2014 wave of research and several preceding Media Literacy surveys conducted periodically using a similar methodology since 2005. All previous reports can be found at www.ofcom.org.uk/medialiteracyresearch and the sample sizes and fieldwork periods are detailed as follows:

Report Published	Sample size Adults aged 16+	Fieldwork months (Year that data is reported on)
2014	1,642	1 wave: Oct-Nov **2013**
2013	1,805	1 wave Sep-Nov **2012**
2012	1,823	1 wave Sep-Oct **2011**
2011	2,117	2 waves: Apr-May & Sep-Oct **2010**
2010	1,824	2 waves: Apr-May & Sep-Oct **2009**
2008	2,905	1 wave: Oct-Dec **2007**
2005	3,244	1 wave: Jun-Aug **2005**

Within the subsequent sections (Sections 4 to 7) comparisons are made with the previous report covering data from fieldwork conducted in 2013, rather than the longer-term trends (although in a number of cases trends are shown in the charts for reference).

Significance testing

Significance testing was carried out at two different levels:

- Statistically significant findings between 2013 and 2014 are indicated in the charts or tables by arrows. These year-on-year comparisons are undertaken at the 99% level, meaning that where findings are commented on, there is only a 1% or less probability that the difference between the samples is by chance.

- 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 2014, to see if there are any significant differences within these sub-groups. We also report on differences between men and women. These demographic differences are highlighted at the 95% level, meaning that where findings are commented on, there is only a 5% or less probability that the difference between the samples is by chance.

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 year. The latest publication can be found at the following location: http://www.ofcom.org.uk/cmr14/

Section 3

Ten years: a retrospective

3.1 Section overview

We conducted our first Adults' Media Literacy survey in 2005. It was designed to understand UK adults' use, habits and attitudes across TV, radio, the internet, mobile phones and games.

Since then the study has been periodically repeated, moving to an annual cycle in 2009. Inevitably, some of the content and scope of the study has shifted year-on-year to account for technology developments, whilst many key areas and metrics have remained consistent in order to ensure accurate measurement of trends. Regardless, the collective data provides compelling insights into how and to what extent the media landscape has evolved, and how people's attitudes and habits have changed accordingly – or not.

This chapter uses the data, along with other contextual references, to demonstrate the key developments over the last decade. Given that age is a consistent key differentiator in terms of media use and attitudes, we focus in particular on the two ends of the generational scale – 16-24 year olds and those aged 65 and over.

Before providing detailed commentary on the trends over the last ten years (accompanied by summary infographics), the first section in this chapter gives a snapshot of what the media landscape looked like in 2005, reminding us how much has changed since then.

3.2 The media landscape in 2005

In 2005, at the time of the first report,[5] several established media and technology brands such as Virgin Media, BBC iPlayer, Netflix, Twitter, and Instagram weren't available; neither were certain devices that are now embedded in the mainstream such as the tablet and the smartphone, and accompanying mobile operating systems such as iOS and Android. As well as those that didn't yet exist there were two online services, nascent in 2005, which are particularly popular today: Facebook and Youtube.

In February 2004 Mark Zuckerberg launched "The facebook", as it was originally known; Within 24 hours, 1,200 Harvard students had signed up, and after one month, over half of the undergraduate population had a profile. It became **Facebook.com** in August 2005. [5]

In May of 2005, a small group of early employees launched the beta test site **www.youtube.com**, a video-sharing website where users could upload, share, and view video files[6]

[5] http://stakeholders.ofcom.org.uk/market-data-research/other/media-literacy/archive/medlitpub/medlitpubrss/auditdata
[6] http://www.theguardian.com/technology/2007/jul/25/media.newmedia
[7] https://sites.google.com/a/pressatgoogle.com/youtube5year/home/short-story-of-youtube

In 2005 television was the dominant media; it was largely watched on the TV set at the time of broadcast, and most homes had a VCR for manual recording.

According to our survey nearly all adults (95%) watched TV regularly, and 44% (52% of those aged 65+) cited it as the media activity they'd miss the most compared to around one in ten for others including listening to music on hi-fi/CD or tape (13%), listening to the radio (12%), using a mobile phone (10%), and using the internet (8%). This was consistent across all age groups except for the youngest (16-24s); for them the mobile phone was of prime importance at 28%, compared to 22% for TV.

In September 2005 the culture secretary Tessa Jowell formally announced plans for the 'digital switchover', with viewers in the Border region having their existing TV signals switched off in three years, followed by the rest of the UK, region by region, until 2012. [7]

In 2005 digital TV had been taken up by 62% of adults. Despite this, the majority (85%) still had a video cassette recorder (VCR) attached to any of their TV sets, with a lower proportion (80%) owning a DVD player. Just one in ten (ranging from 3% of 65+ year olds to 19% of 16-24s) had a Digital Video Recorder (DVR), and these were mainly early adopters of *Sky+*, a device that had been available to subscribers of Sky's satellite TV service since 2002 but still hadn't quite entered the mainstream (around 10% of Sky customers were subscribers[9]).

These types of devices were the prominent methods of time-shifting TV, and all were reliant on self-planning and manual recording by the user. When asked how they found what to watch on TV half of adults with a TV in their household said they used the guide in newspapers, compared to 19% for the Electronic Programming Guide (EPG). There was an age differential in this question that was most apparent between 16-24s and 65+ year olds, with older ages having a higher propensity towards traditional media - 39% v 66% for newspapers; 22% v 29% for the Radio Times, 19% v 6% for Teletext, and 18% v 7% for the EPG.

Accessing on-demand video content via the TV set was a new concept in 2005:

In December 2005 the cable TV provider Telewest completed its roll out (having regionally piloted it earlier in the year) of the first true Video On-Demand (VoD) service in the UK. The service was branded 'Teleport' and allowed a selection of 'catch-up' TV programmes, movies and other 'on-demand' content to be accessed by customers via its 'TVDrive' box.[8]

As such, scheduled TV watched at the time it was broadcast was very much the norm, with almost all time-shifted viewing being through a VCR or DVR. BARB viewing measurements reflected this. The two highest viewed programmes across the whole of 2005 according to

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[8] http://news.bbc.co.uk/1/hi/entertainment/4247622.stm
[9] Ofcom Communications Market Report 2005, Television p182
[10] http://mediatel.co.uk/newsline/2005/12/16/telewest-completes-on-demand-tv-roll-out/

BARB[11] were Coronation Street and Eastenders, with over 12 million UK adults watching their most viewed episodes.

Just over half of adults had internet access, with over a third using dial-up. It was used mainly for email and browsing information.

In 2005 the internet was being used at home by 51% of UK adults, ranging from 21% of 65+ year olds to 70% of 35-44s (the figure was 61% for 16-24s). Close to two thirds (64%) of adults with home internet access had broadband, with the remaining 36% still using dial-up; a fifth (19%) used a wireless (Wi-Fi) connection. Outside of the home the internet was accessed by just over a third of adults (36%).

The main reason given by respondents for getting the internet was to access information, cited by 46% of those who already had it, and 43% of those who were planning to get it in the future. Communication was the second highest reason (28% and 20% respectively). Entertainment was cited by just 16% and 13%.

This was reflected in the popularity of activities that people used the internet for at least once a week - the highest response was 70% for email followed by finding information for work/ study (52%) and finding information for leisure time or holidays (34%).

The majority of adults regularly used a mobile phone, but they were predominantly used for calls and texts.

Nearly three quarters (73%) of UK adults said they regularly used a mobile phone. While this figure was close to universal amongst 16-24s (92%) it decreased by age to 33% of those aged 65+. In 2005, even among 16-24s, mobile phones were predominantly used for calls and text messages - 93% and 94% respectively said they did these activities at least once a week, compared to 19% for accessing the internet and 8% for using email. Among adult mobile phone users of all ages these figures were just 7% and 5%. Taking photos was the most popular non-communication activity on a mobile for 16-24s, with six in ten saying they did this (58%).

In terms of mobile technology, 3G was a relatively new advancement. Although UK coverage had reached around 90% in 2005[12] this wasn't yet reflected in take-up figures. Eleven per cent of mobile phone owners cited having it on their phone, only half of all adults had heard of it, and less than half of these people (23%) said they could describe what it meant.

Another example of the comparatively limited functionality of mobile phones in 2005 is demonstrated by the fact that the most popular motivation for getting one in the first place was 'for emergencies' (56%, rising to 82% amongst those aged 65+). Furthermore, listening to music or recording videos on their phone were activities we didn't ask about on the survey, as these functions barely existed. Instead we were measuring the ownership of relatively new technologies such as mp3 players (owned by 23%), digital cameras (50%) and camcorders (22%). All of these were very much considered standalone devices.

The landline phone was still a very prominent part of social communication, but the mobile phone was already taking precedence for younger adults.

When asked the preferred method for people to make contact to arrange to meet; exactly half of respondents nominated the landline, compared to 27% text messaging, and 19% a mobile phone call. However, again highlighting the increased importance of the mobile phone among 16-24s, 57% of this age group cited text messaging, and 29% a mobile phone

[11] See Annex: websites visited and top 20 television programmes
[12] http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cm06/

call, compared to 13% for landline. This very much contrasted with over 65+s where the landline was cited by 89%, the mobile phone by 5%, and text messages by a mere 2%.

Although most people had access to digital radio, it was only being used by around a quarter of adults.

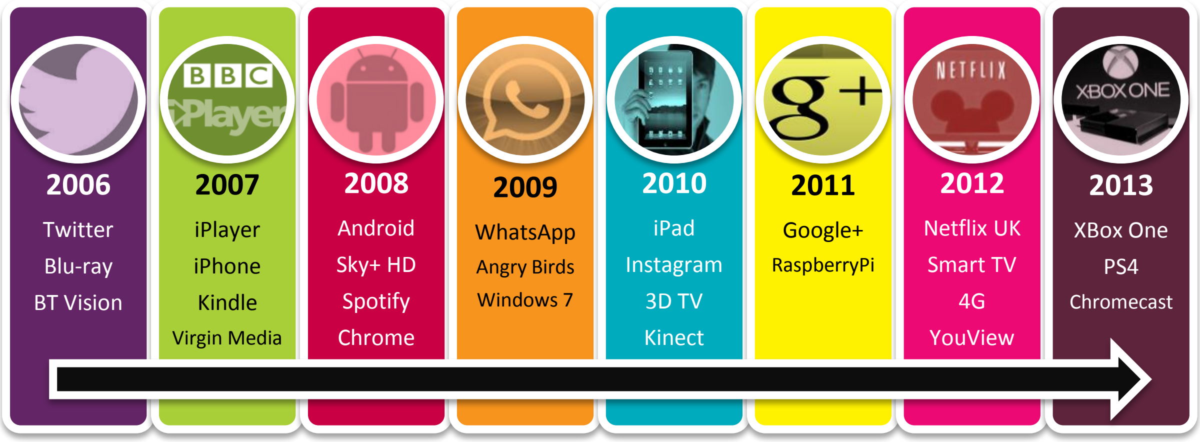
Ten years on from the launch of the first digital radio service in the UK from the BBC in 1995[13], and with the increase of digital TV and internet connections as an alternative means of access, the number of people who said they had access to digital radio services was high at 77%. However, a third of adults were unaware that they could listen to digital radio services through either their TV or internet service. Around a quarter (27%) said they ever listened to digital radio, and of these over two-thirds (68%) said they now listened to more radio stations as a result.

Gaming was predominantly undertaken through a dedicated games console, with just one in ten regularly doing it on a mobile phone.

In 2005 nearly half of adults (48%) said they had a games console in their household, with 21% saying they played on one regularly. The proportion who played games on a mobile phone at least once a week was around half this (13%).

3.3 Media launches from 2006 onwards

Since 2005, each year (particularly 2007) has seen high profile launches of products or services, all particularly geared around internet based delivery, and all playing a part in the current media and communications landscape.



The following two sections will focus on the two main areas of our media literacy research:

1. Digital take-up and use
2. Media attitudes and critical understanding.

Each of these sections is introduced with an overview infographic ('10 years at a glance') containing the key findings, and is then followed by more detailed narrative.

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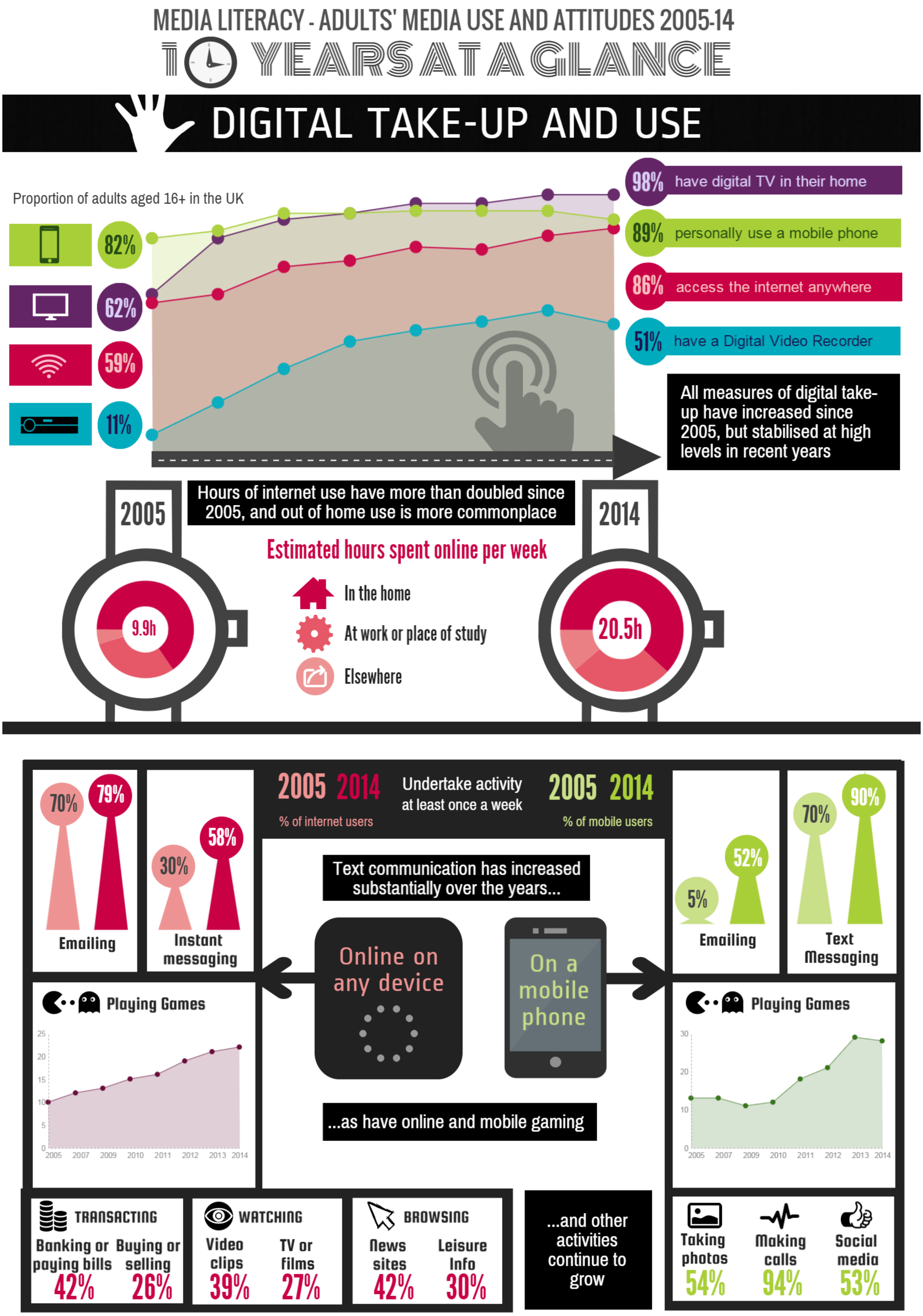
13 http://www.bbc.co.uk/news/10569231

3.4 Digital media take-up and use (2005-2014)



Internet take-up

One of the most salient changes over the last ten years has been the way in which people access the internet and consume online content, driven by several inter-related factors including evolutions in technology, infrastructure, cost/price, attitudes, etc. As a result all measures of internet take-up covered by our survey have increased over the years[14].

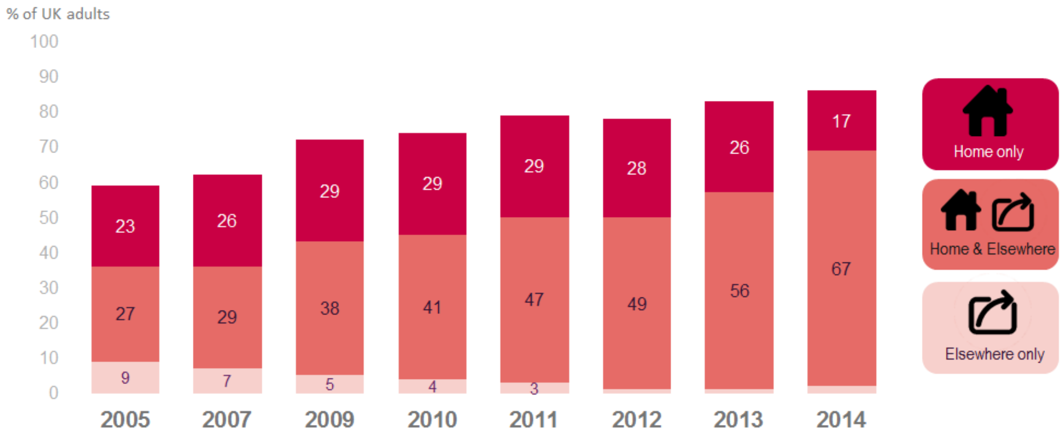
Around four fifths of adults go online in their home; an increase of 30 percentage points since 2005.

In 2005 just over half of adults (54%) had internet access at home through a PC or laptop, 4% of whom said they didn't use it; there was little evidence of access via alternative devices and a sizeable proportion of these people had a dial-up connection. Internet use through a PC/laptop now stands at 77%, but taking into account going online via other devices 84% do so in their home in total. Fixed broadband and Wi-Fi connections are so commonplace among these people now that we no longer ask about them in the survey.

The proportion of adults who go online both inside and outside of the home has also increased by 40 percentage points since 2005.

Two thirds (67%) of adults now claim to go online both inside and outside the home, compared to just over a quarter (27%) in 2005. This proportion has increased steadily year-on-year, as shown in Figure 1 below.

Figure 1: Location of internet use: 2005-14



Derived from multiple questions (IN1/IN2/IN3/IN4)
Base: All adults aged 16+ (1890 in 2014)

The computer remains the primary means for accessing internet content, but the use of alternative devices has increased substantially over the years.

As mentioned above, the number and types of devices being used to access internet content has expanded considerably from what was primarily restricted to the computer (PC/laptop/netbook). This is evident from Figure 2 which shows a substantial increase in going online via alternative devices (such as smartphones and tablets) since the metric was introduced in 2009 – from 31% to 69%. This use still generally complements computer access rather than replaces it, as supported by the fact that just 6% of adults only use an alternative device (although this figure was 2% in 2009, so it has increased).

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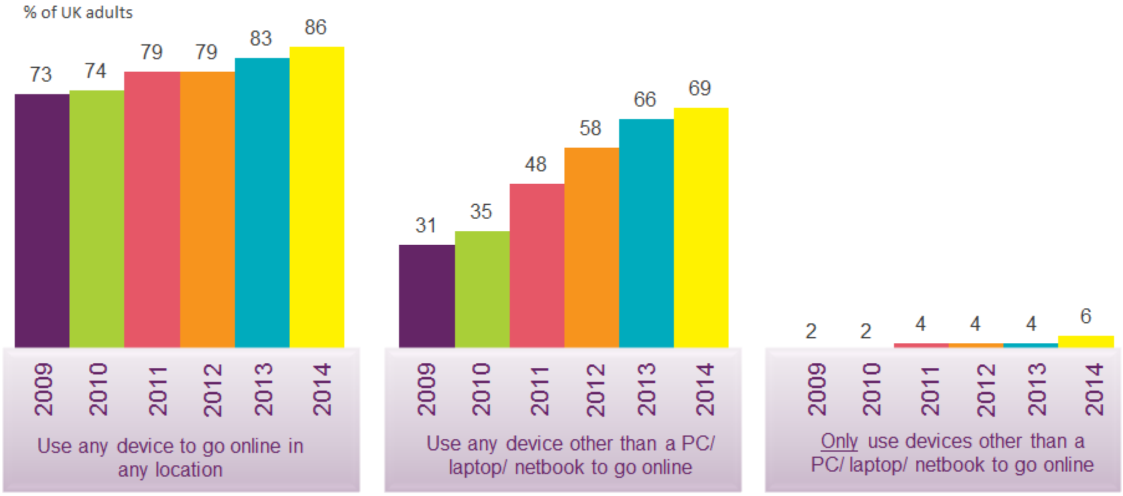
[14] The take-up figures collected for this report give useful contextual information to understand better the behavioural and opinion-based findings about media literacy. Official all-UK Ofcom take-up figures based on a larger survey can be found in the annual CMR (Communications Market Report) published in August each year e.g. http://www.ofcom.org.uk/cmr14/

Figure 2: Use of devices to go online: 2009-14

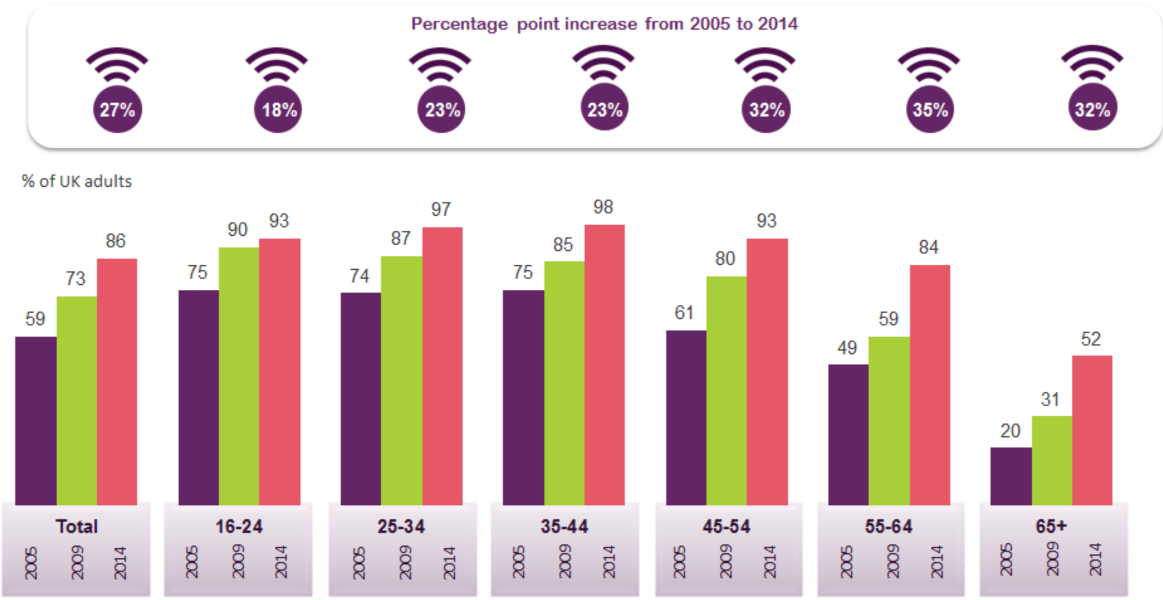


Derived from multiple questions (IN1/IN2/IN3/IN4)
Base: All adults aged 16+ (1890 in 2014)

The proliferation of internet access in multiple locations across devices has meant that 9 in 10 adults now go online, compared to 6 in 10 in 2005.

As a result of the aforementioned factors, internet use across any device and in any location currently stands at 86%, an increase of 27pp (percentage points) across the ten years of tracking. As shown in Figure 3 the highest rate of increase by age group has been among the 55-64s, up 35pp to 84% in 2014. In contrast, three quarters of 16-24s already had access in 2005, and 9 in 10 do now, meaning the rate of increase has been comparatively lower (18pp). For the oldest age group (aged 65+) a majority (52%) now go online.

Figure 3: Proportion of adults who go online anywhere, by age: 2005-14



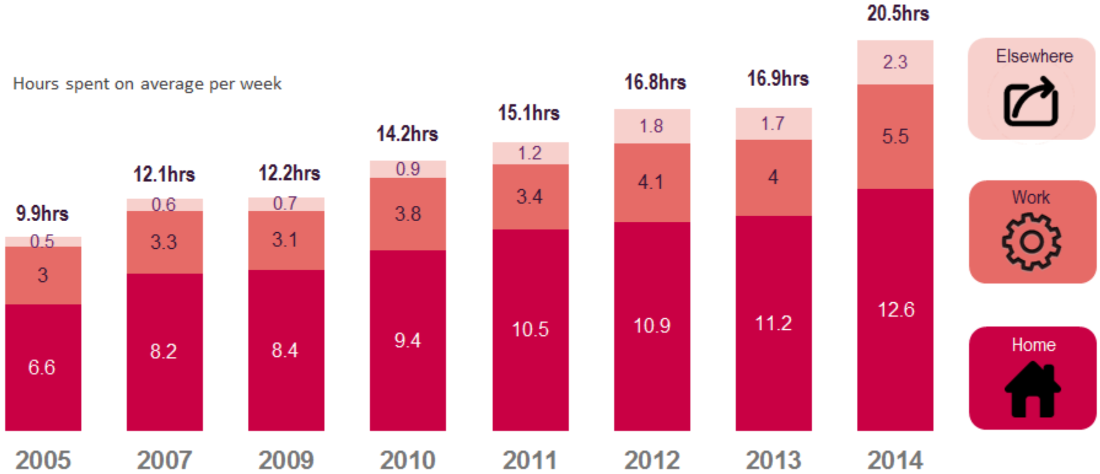
Derived from multiple questions (IN1/IN2/IN3/IN4)
Base: All adults aged 16+ (1890 in 2014)

As well as more people accessing the internet, the time they spend online has more than doubled since 2005.

The claimed weekly hours of internet use amongst all adults has progressively increased year-on-year since 2005, from 9.9 hours to 20.5 hours on average. This has been the case across all locations; both home (12.6 hours) and work/place of education (5.5 hours) access have nearly doubled from 6.6 and 3 hours respectively, while out of home use has increased five-fold from half an hour in 2005 to nearly two and a half (2.3) hours in 2014.

At the two ends of the age spectrum, the total among 16-24s has increased substantially from 10.4 to 27.6 hours, while the increase has been much lower among 65+ year olds[15] (6.5 to 9 hours).

Figure 4: Hours spent online in a typical week, by location: 2005-14



IN6A/IN6B/IN6C: How many HOURS in a typical WEEK would you say you go online at <LOCATION>?
Base: All adults who go online in any location on any device (1609 in 2014)

Smartphones and tablets

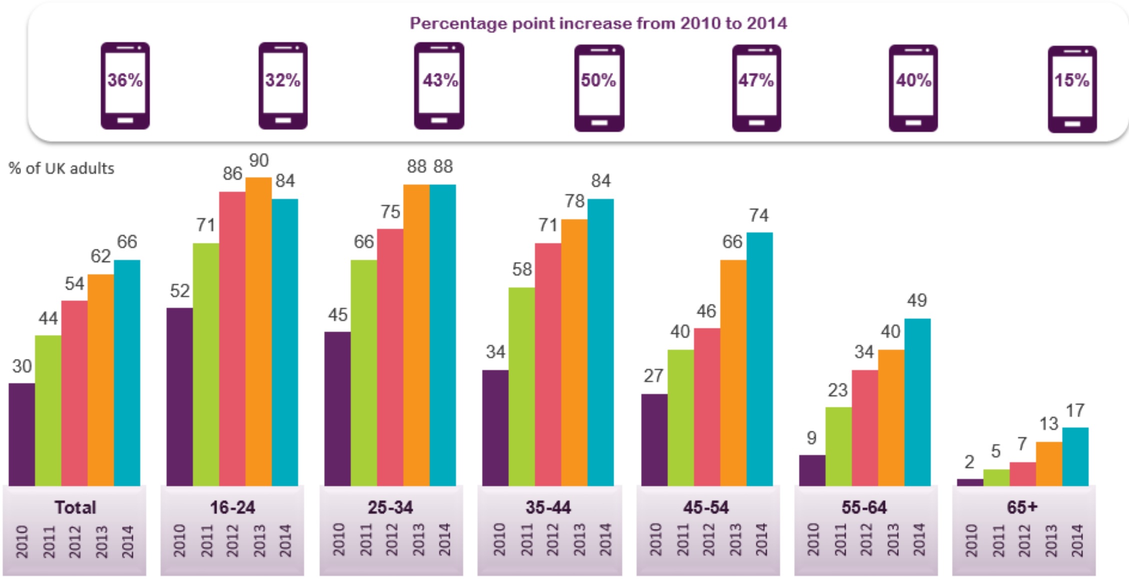
The use of smartphones and tablets has increased substantially over the last few years, with two thirds of adults now owning the former.

In 2010 we introduced measures for two emerging device types – the 'smartphone' and the 'tablet'. The former was already more established than the latter as it was essentially an extension of an already popular device, but at the same time it was a relatively new concept that required some explanation to respondents when asking if they used one; namely *"a phone on which you can easily access emails and download files as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and HTC"*. At that time 30% of all adults claimed to have one, ranging from just 2% of those aged 65+ to 52% of 16-24 year olds. Since then (as shown in Figure 5), most years have shown significant increases and now stands at 66% overall, ranging from 17% of those aged 65+ to 88% of 25-34 year olds.

While penetration among those under the age of 35 has seemingly hit saturation point around the 9 in 10 mark, older ages are still showing some growth year-on-year. Despite this the oldest age group (65+) has seen the lowest percentage point increase since 2010 by some distance (15 percentage points), with the highest being among 35-44 year olds (50 percentage points).

[15] Note: the base for online users aged 65+ was relatively low in 2005 (78) so should be treated with some caution

Figure 5: Proportion of adults who own a smartphone, by age: 2010-14

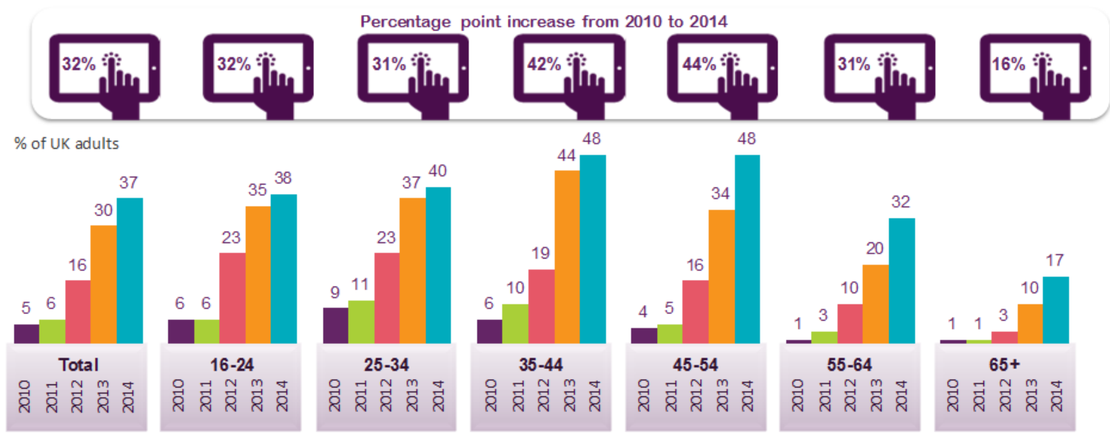


M2. Is this a smartphone? Answer: Yes
Base: All adults aged 16+ (1890 in 2014)

Six in ten (61%) adults now use a smartphone to go online, and while calls and texts remain the dominant activities, a wealth of other activities are being undertaken through the range of apps either already on the phone or downloaded from one of the app stores. This also applies to tablets.

While just 5% cited using a tablet to go online at home in 2010 (prior to the launch of the iPad and Android tablets[16]), this has increased substantially to 37% in 2014. This type of device has been particularly popular with the middle age groups – with the penetration among both 35-44s and 45-54s higher than all other age groups at 48%. The latter were the main drivers of increase during the current wave of research (from 34% in 2013), and means that this age group has seen a 44 percentage point rise since 2010.

Figure 6: Proportion of adults who use a tablet to go online, by age: 2010-14



IN2/IN3: Do you have and use any of the items shown on this card to go online at home? Answer: Tablet
Base: All adults aged 16+ (1890 in 2014)

[16] The 2010 report comprised data from 2009. The iPad was launched in May 2010.

Text communications

Text communication methods have become increasingly popular since 2005, particularly on mobile phones.

One area that has evolved along with device functionality, mobility and an increasing choice of digital tools is text communication – namely text messaging, email and instant messaging. Along with social media (discussed separately in the following sub-section), each of these methods have risen substantially in scale of usage over the years, and this has been particularly noticeable on mobile phones.

The changed nature of communication was evident in 2013 when we asked what method respondents preferred when making contact to arrange to meet[17]. Back in 2005 exactly half of respondents nominated the landline, compared to 27% text messaging, and 19% mobile phone call. By 2013 this picture had changed substantially with 43% of all adults citing text message, followed by 29% mobile phone call and just 23% landline.

Although in 2005 those aged 16-24 were already mainly citing text messages (57%) and mobile phone calls (29%) as their preferred method of social contact, this had heightened further by 2013 with these two figures standing at 71% and 23% respectively (for this age group the landline was 1%, compared to 13% in 2005).

Figure 7 demonstrates the increased use of both text messaging and emailing via a mobile since 2005, as described below:

Text messaging

Texting was already a comparatively popular activity in 2005, done at least once a week by seven in ten (70%) mobile users. However, the increased take-up of this activity by older age groups has meant it has risen to nine in ten and applies to over half (56%) of those aged 65+.

For mobile phone users under the age of 55, text messaging is almost universal in 2014 (at least 96% of each age group do it at least once a week).

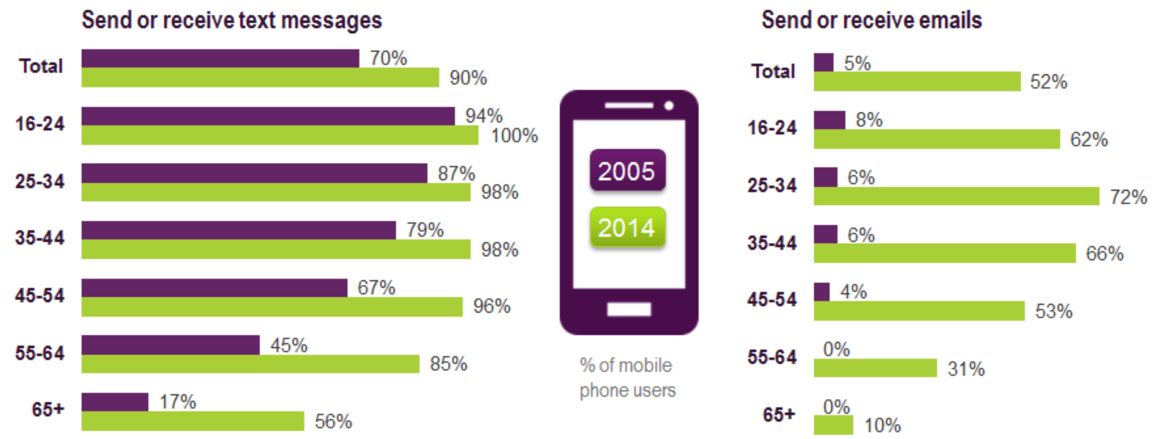
Email

Emailing, which was traditionally confined to the computer, is now done at least once a week on any device by eight in ten internet users (79%), compared to seven in ten (70%) in 2005. This is highest among 35-44s (84%) and lowest among 65+ year olds (67%).

More salient is the fact that 52% of mobile phone users are now emailing at least once a week on their device, compared to 5% in 2005. This is highest among 25-34 year olds (72%) and lowest among 65+ year olds (10%).

[17] This question was not included in 2014.

Figure 7: Weekly use of texts and email on a mobile phone, by age: 2005 vs. 2014



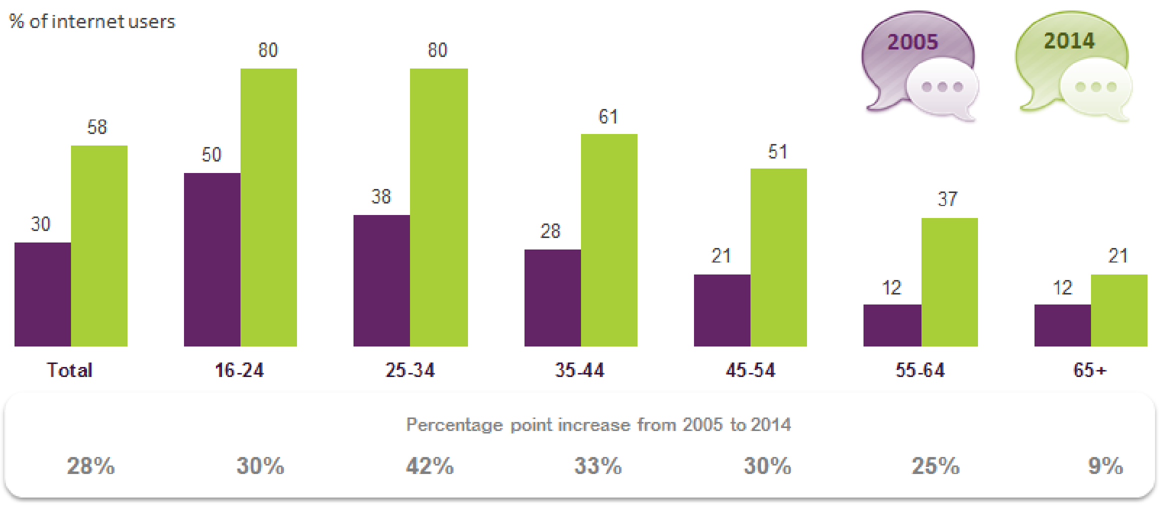
M7. How often do you use a mobile phone to <activity>? Answer – at least once a week.
Base: All mobile phone users (1670 in 2014)

Instant Messaging

Instant messaging (IM) has also become a common activity over the years, driven by the increase range of multi-platform services available, such as WhatsApp, iMessage, Facebook Messenger[18], BBM, etc. The proportion of mobile users who say they do this at least once a week on their phone is currently 42%, but this rises to 58% (compared to 30% in 2005) on any device among internet users.

As shown in Figure 8 this increase is most marked among 25-34s with a percentage point rise of 42; along with 16-24s instant messaging is being undertaken by at least 8 in 10 of this age group at least once a week. In contrast, those aged 65+ have seen the lowest rise (9 percentage points), but this is still close to twice what it was in 2005 (21% vs. 12%).

Figure 8: Weekly use of the internet for instant messaging, by age: 2005 vs. 2014



IN15B. How often do you use the internet for Instant Messaging…?
Base: All adults aged 16+ who use the internet at home or elsewhere (1609 in 2014)

[18] Previously Facebook Chat

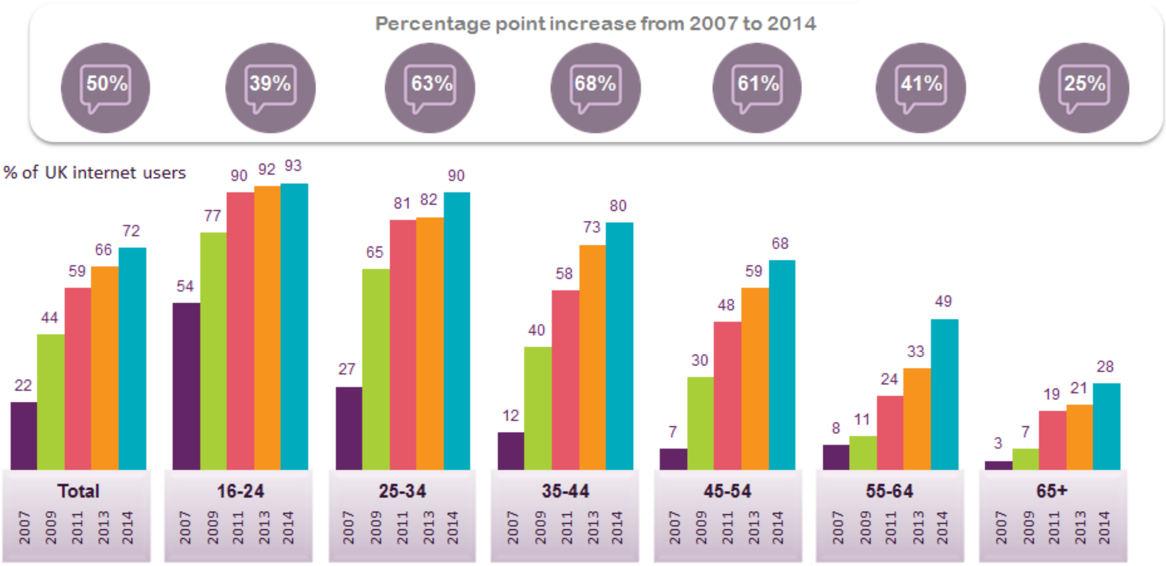
Social media

The popularity of social media has continued apace with 7 in 10 internet users having a profile, and four fifths of these people visiting it at least once a day.

Social media, which ties in with text communication and a range of other online activities, has been one of the biggest online developments of the last decade. Back In 2005 we didn't ask about it. In 2007 one in five (22%) online users said they had ever set up a profile on a website such as Piczo, Bebo, hi5, Facebook or Myspace (the main social media sites at the time); Facebook was by far the most popular of these sites at 62%. Now we ask respondents a similar question, but include apps alongside websites, and cite the examples of Facebook, Twitter, LinkedIn, Instagram, Tumblr or Pinterest.

As shown in Figure 9 the proportion with at least one social media profile stands at 72%, decreasing exponentially by age – from 93% of 16-24s to 28% of 65+s. Although 16-24s have always had higher levels than older ages, the most marked increase over time has been among the 35-44s - a 68 percentage point increase from 12% to 80%. In terms of the services used by those with a profile, Facebook reaches 97%, followed by Twitter at 26%.

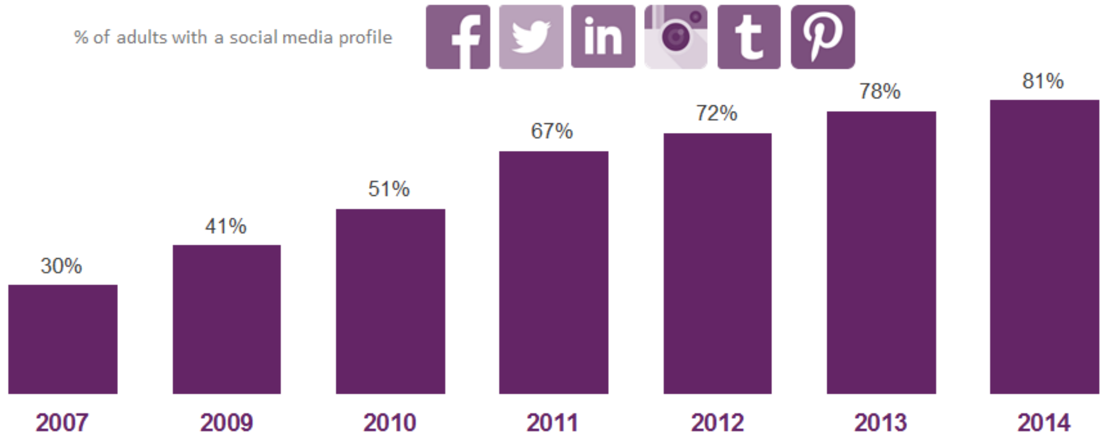
Figure 9: Proportion of internet users who have a social media profile, by age: 2007-14



IN24. I'd now like to ask you some questions about social media (DESCRIPTION OF SOCIAL MEDIA). Do you have a social media profile or account on any sites or apps
Base: All adults aged 16+ who use the internet at home or elsewhere (1609 in 2014)

As shown in Figure 10, eight in ten (81%) of those with a social media profile say they visit social media sites or apps at least once a day, compared to 30% in 2005. The impact of mobile phones has also been evident in this space with 40% of mobile users citing using it for social media on a daily basis. Furthermore, 46% of those who use social media say the device they use most often for it is a smartphone (laptop/netbook is the second most popular device at 29%).

Figure 10: Daily use of social media: 2007-14



IN27: How often do you visit any social media sites or apps (like Facebook, Twitter, LinkedIn, Instagram, Tumblr or Pinterest), using any device?
Base: All with social media profile (1093 in 2014)

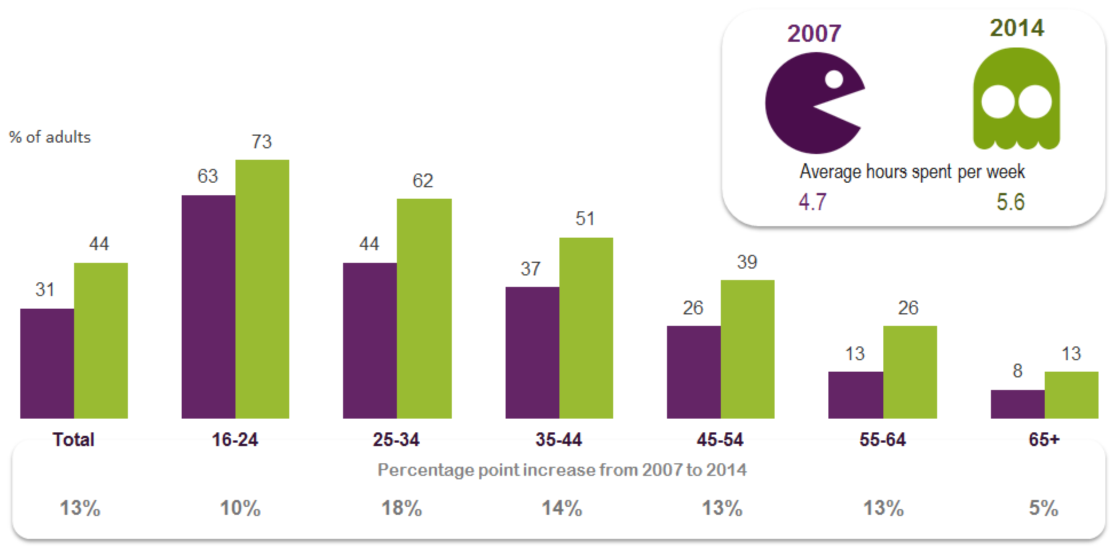
Gaming

As well as a general increase in gaming since 2007, doing so online on any device and specifically via a mobile phone have both doubled in weekly usage.

As shown in Figure 11, the incidence of playing games on any device has increased from 31% in 2007 to 44% in 2014. While those aged 16-24 are still the most active gamers (73%), a majority of those between the ages of 25 and 44 now ever partake in some form of gaming activity. The incidence among 25-34s has seen the largest percentage increase of all age groups (18), from 44% in 2005 to 62% in 2014. In contrast, there has only been a 5 percentage point increase among those aged 65+ (to 13% in 2014).

Among those who play games, the average number of hours has not shown a statistically significant change (4.7 vs. 5.6).

Figure 11: Proportion of adults who play games, by age: 2007 vs. 2014

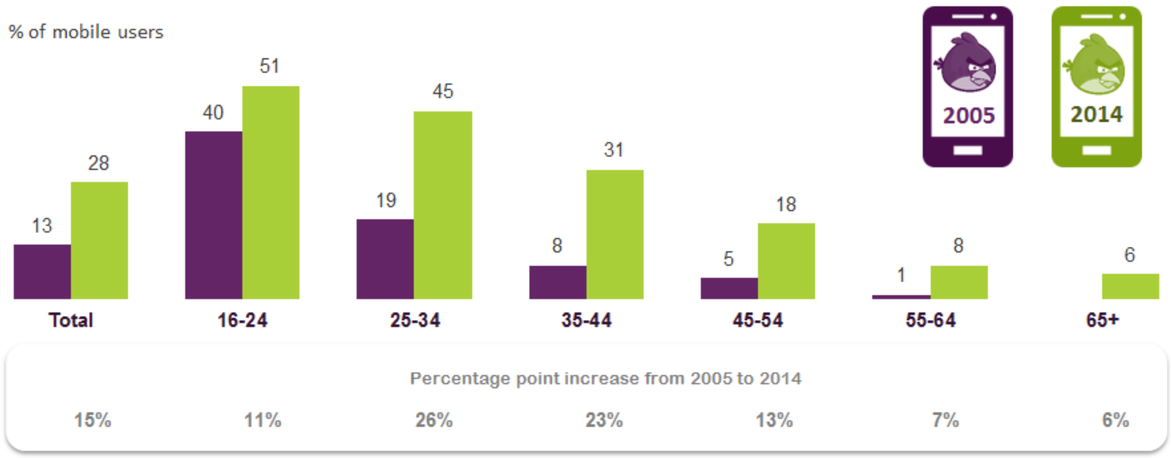


G1: Do you ever play games at home or elsewhere in any of these ways? (Prompted responses, multi-coded)
Base: All adults aged 16+ (1890 in 2014).

The proportion of adults citing that they play games using a console such as an Xbox or PlayStation has remained relatively consistent over the years (20% in 2007 vs. 17% in 2014). However, gaming on mobile devices has increased substantially during this time. In fact the mobile phone is now the primary device used for gaming - a quarter (26%) of all adults say they ever do it and 28% of mobile users do so at least once a week, compared to 13% in 2005.

As shown in Figure 12, the incidence of playing games on a mobile phone at least once a week is highest among 16-24s at 51%, but the largest increases have been in the 25-34 and 35-44 age groups, the former by 26 percentage points to 45%.

Figure 12: Gaming on a mobile at least once a week, by age: 2005 vs. 2014



M7. How often do you use a mobile phone to play games? Answer – at least once a week
Base: All mobile phone users (1670 in 2014)

As well as mobiles, since tablets were introduced this device has also seen a steady increase in its claimed usage for gaming each year, and is now at 15% of all adults (decreasing by age from 24% of 16-24s to 5% of 65+s). Coupled with this, the proportion of internet users saying that they play games online at least weekly has risen from 10% in 2005 to 22% in 2014.

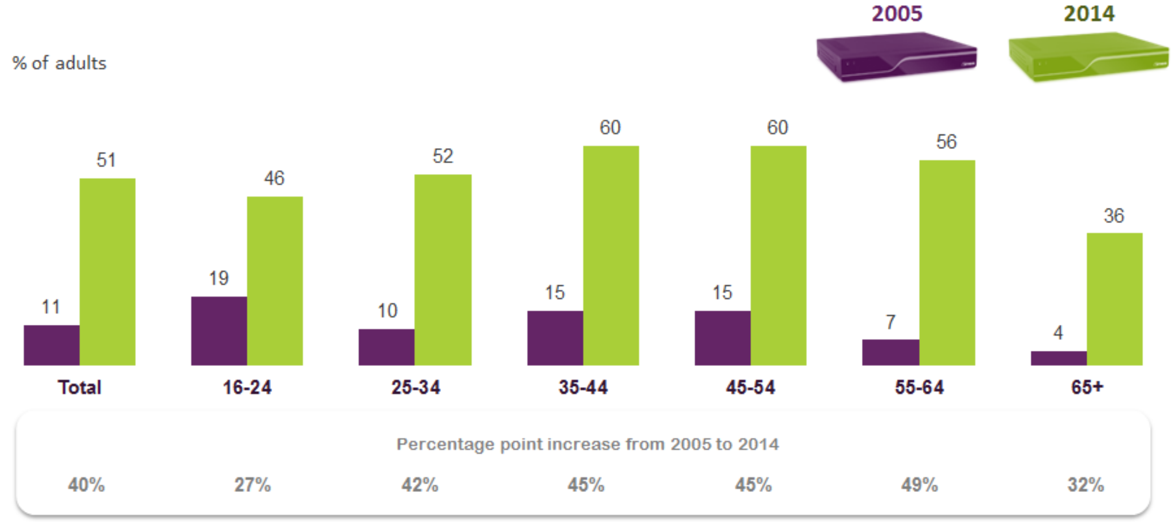
Watching audio-visual content

While digital TV is now universal, ownership of DVRs has increased by 40 percentage points since 2005.

Between 2005 and 2007 (following the announcement of the digital switchover) take-up of digital TV saw a sizeable rise from three fifths to four fifths of households, driven by the increasing popularity of Freeview and pay TV services such as Sky, plus the newly formed Virgin Media. At that point in time it became clear that people were replacing their VHS cassette recorders, with ownership falling to 73% from 85% two years earlier. Although ownership of DVD 'players' stayed at similar levels to 2005, DVD 'recorders' were being taken up at higher volumes in 2007 (37%, up from 21%). On top of this Digital Video Recorders (DVRs) were slowly increasing as a wider repertoire became available – 23% of household had one in 2007 compared to 11% in 2005.

Since this time Digital TV has become universal (switchover completed in October 2012), and DVRs have become mainstream devices. While overall ownership levels peaked at 55% in 2013, it appears to have stabilised in 2014 (51%). This ranges from 36% of 65+ year olds (4% in 2005) to 60% of 35-54 year olds (15% in 2005), as shown in Figure 13.

Figure 13: DVR ownership, by age: 2005 vs. 2014

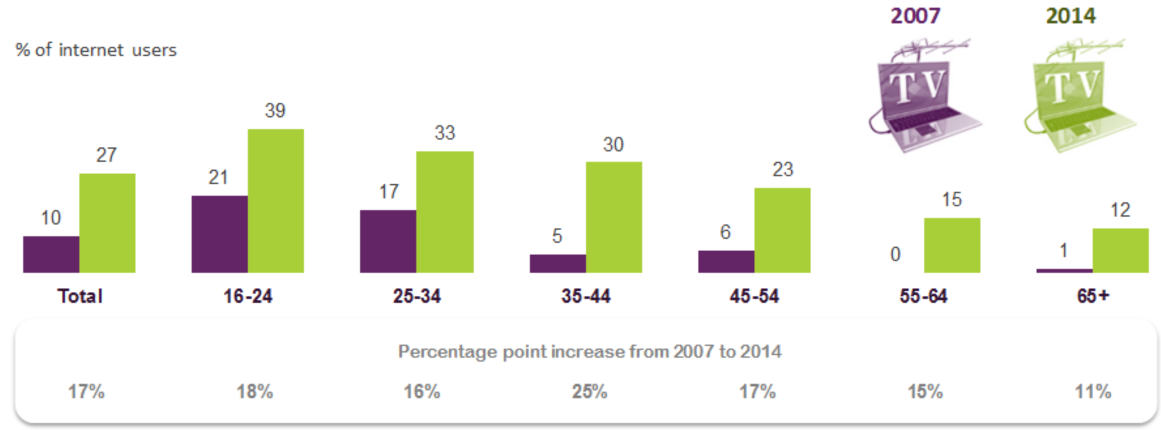


T2. Do you have a DVR system such as Sky Plus, V Plus, Freeview Plus, or any other similar system?
Base: All adults aged 16+ (1890 in 2014)

Watching TV remains hugely popular, but it has increasingly converged with the internet, and user-generated video content has become a prominent information source.

Alongside the above has been a constant growth in watching TV programmes or films online. Ten per cent of internet users said they did this at least once a week (38% ever) when the question was introduced in 2007. This was at a time when BBC iPlayer was about to be launched, and long before Netflix, Amazon Instant Video, etc. Now the weekly figure stands at 27% (60% ever), falling by age from 39% of 16-24s to 12% of 65+ year olds, as shown in Figure 14 .

Figure 14: Watching TV or films online at least once a week, by age: 2007 vs. 2014

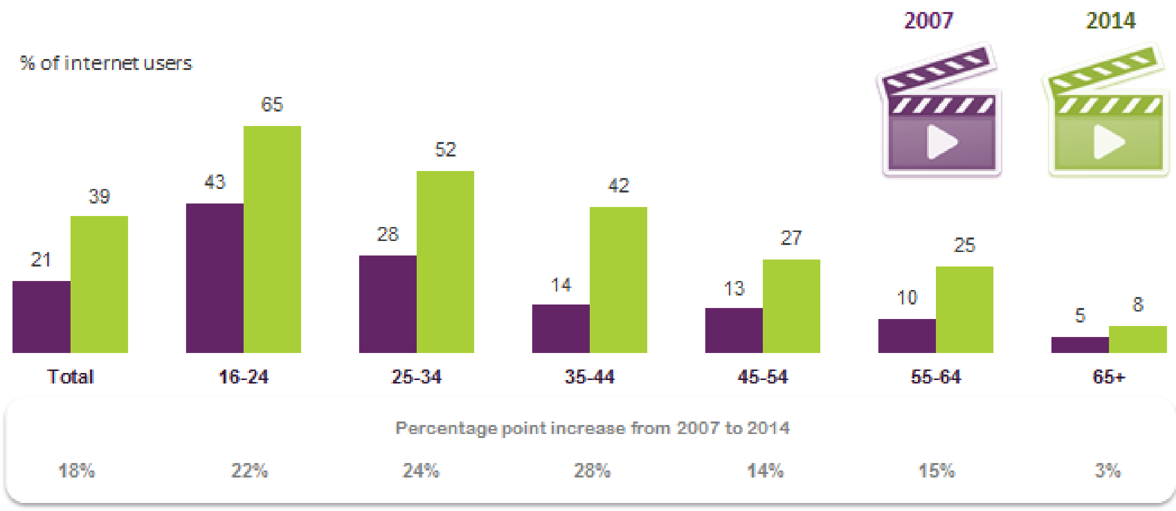


IN15M. How often do you use the internet to watch online or download TV programmes or films? Answer – at least once a week
Base: All adults who go online in any location on any device (1609 in 2014)

While the TV set has proved resilient in the main (In 2014, 37% say they would miss their TV set more than any other device) there are clear generational differences as this figure varies substantially from 17% of 16-24s to 65% of 65+ year olds. For the younger age group it comes a distant second to the mobile phone, cited by 6 in 10 (59%), compared to 28% in 2005.

As well as the increase in 'long-form' audio-visual content (i.e. TV and films) delivered and consumed via the internet, the consumption of 'short-form' online content (i.e. video clips) has also increased considerably In 2007 we started gauging the extent of watching this type of content and it has almost doubled during this time (21% to 39% in 2014). As displayed in Figure 15, all ages up to 65+ have seen considerable increases, with the highest being among 35-44s (28 percentage points).

Figure 15: Watching short video clips online at least once a week, by age: 2007 vs. 2014



IN15L. How often do you use the internet to watch online or download short video clips such as music videos or comedy clips? Answer – at least once a week
Base: All adults who go online in any location on any device (1609 in 2014)

Akin to this, the popularity of the multi-platform online video service YouTube as an information source has been evident in recent years – 32% of internet users now cite it as an important (very or fairly) source for information, rising to 46% of 16-24 year olds.

This growing popularity of consuming user-generated content is not restricted to video either, with Wikipedia being cited as an important information source by 43% of internet users (ranging from 50% of 25-34 year olds to 29% of those aged 65+). Furthermore, 3 in 10 cite online recommendations from friends/family/colleagues (31%) and websites with user reviews (29%), as important information sources.

This interest in user-generated content was already evident in 2005 but was naturally more restricted to what was available at that time. While we didn't ask about the use of sites such as Wikipedia and YouTube as information source, as we do now, a third (33%) of those who used the internet for travel information said they used sites that have reviews and recommendations from other travellers, while 28% of those who used the internet to find new products followed individual reviews online.

Other online activities

A number of activities that previously took place offline are increasingly being done online.

News

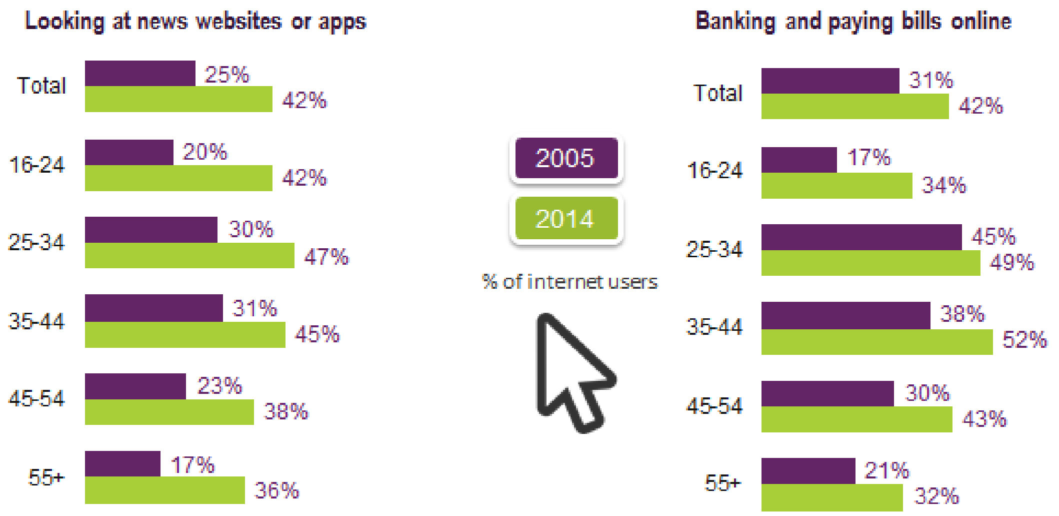
Consumption of news across any online platform has seen a large increase since 2005, from 25% to 42%. Figure 16 breaks this down further by age; and demonstrates that it is most prevalent at either end of the age scale – the figures for 16-24s (20% to 42%) and those aged 55+ (17% and 36%) have more than doubled.

Banking and paying bills online

Banking and paying bills online has also increased since 2005 – from 31% to 42% in 2014. As shown in Figure 16 the most substantial increase has been among 16-24 year olds where the weekly figure has doubled from 17% to 34%. All other age groups have increased too, but for 25-34s it hasn't been significant (49% vs. 45% in 2005). For 55+ year olds it has increased from 21% to 32%[19].

It is important to note that online shopping has shown signs of similarly large increases since 2005, but is not commented on here due to several changes in wording since this time[20].

Figure 16: Weekly internet activities – news and banking/paying bills: 2005 vs. 2014



IN15L/M: How often do you use the internet to <activitiy>. Answer – at least once a week
Base: All adults who go online in any location on any device (1609 in 2014)

Public/civic activities

Public/civic activities are another area that have shown some increase at a weekly level. There are two individual activities that come under this bracket, and have been included on the survey since 2005; *finding out about public services* has increased from 12% to 18%, and *looking at political or campaigning issues websites* has increased from 4% to 11%.

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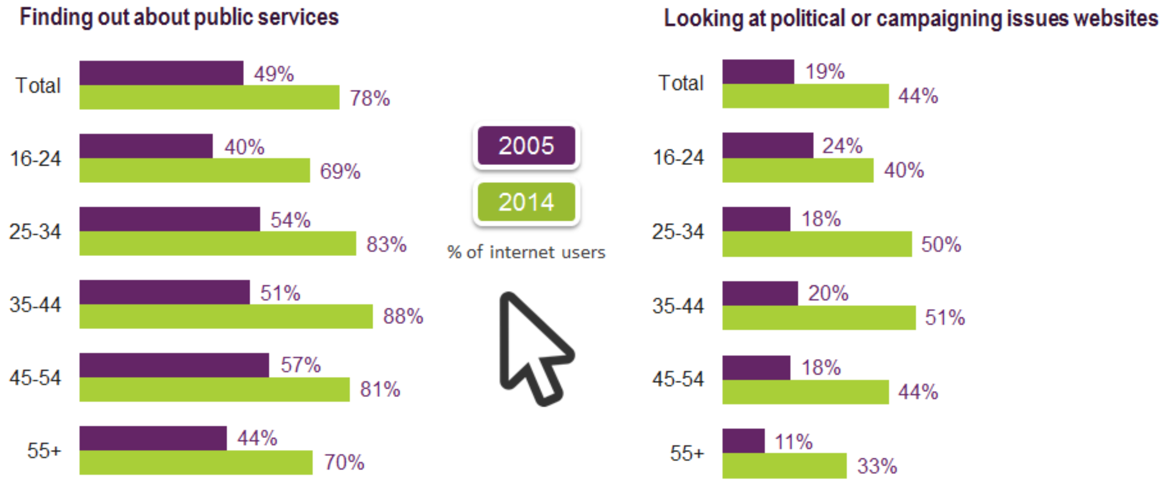
[19] Note: we don't break it out further to include 65+ year olds, as the base of internet users was too low in 2005 for this age group.

[20] In 2005 we asked about *online shopping* and *buying and selling on auction sites*. From 2009 we asked about *buying and selling online*. Since 2013 we have split this into two activities- *buying online* and *selling online*

However, since this category of activity is generally less likely to be done regularly than the other ones covered so far, it is also useful to assess this across a longer period. As shown in Figure 17 both activities have increased substantially across all age groups. At a total level *finding out about public services* has increased from 49% to 78%, while *looking at political or campaigning issues websites* has more than doubled from 19% to 44%.

Figure 17: Using the internet ever for public/civic activities: 2005 vs. 2014



IN15L/M: How often do you use the internet to <activitiy>. Answer – Daily, Weekly or less often
Base: All adults who go online in any location on any device (1609 in 2014)

There is also evidence that some online activities have remained more static, or even decreased since 2005.

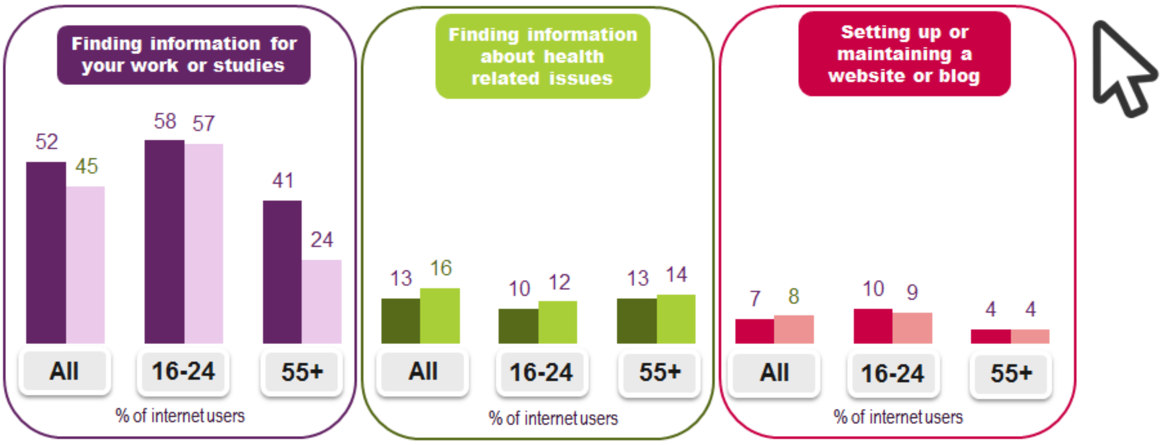
There are three activities which we have asked each wave of our research that haven't shown significant increases in weekly use since 2005:

- ***Finding information for your work/ job/ studies*** is still one of the most popular activities undertaken at least once a week, but it has seen a 7 percentage decrease from 52% vs. 45%. This has been driven by a decrease among those aged 55% (from 41% to 24%). The proportion citing <u>ever</u> doing it has remained fairly constant (75% in 2005 vs. 71% in 2014).

- ***Finding information about health related issues*** is undertaken at least once a week by 16%, compared to 13% in 2005. The levels among 16-24s (12%) are similar to those aged 55+ (14%), and neither have changed over time. However, eight in ten (78%) internet users have <u>ever</u> used the internet for this purpose and this has increased from six in ten (61%) in 2005.

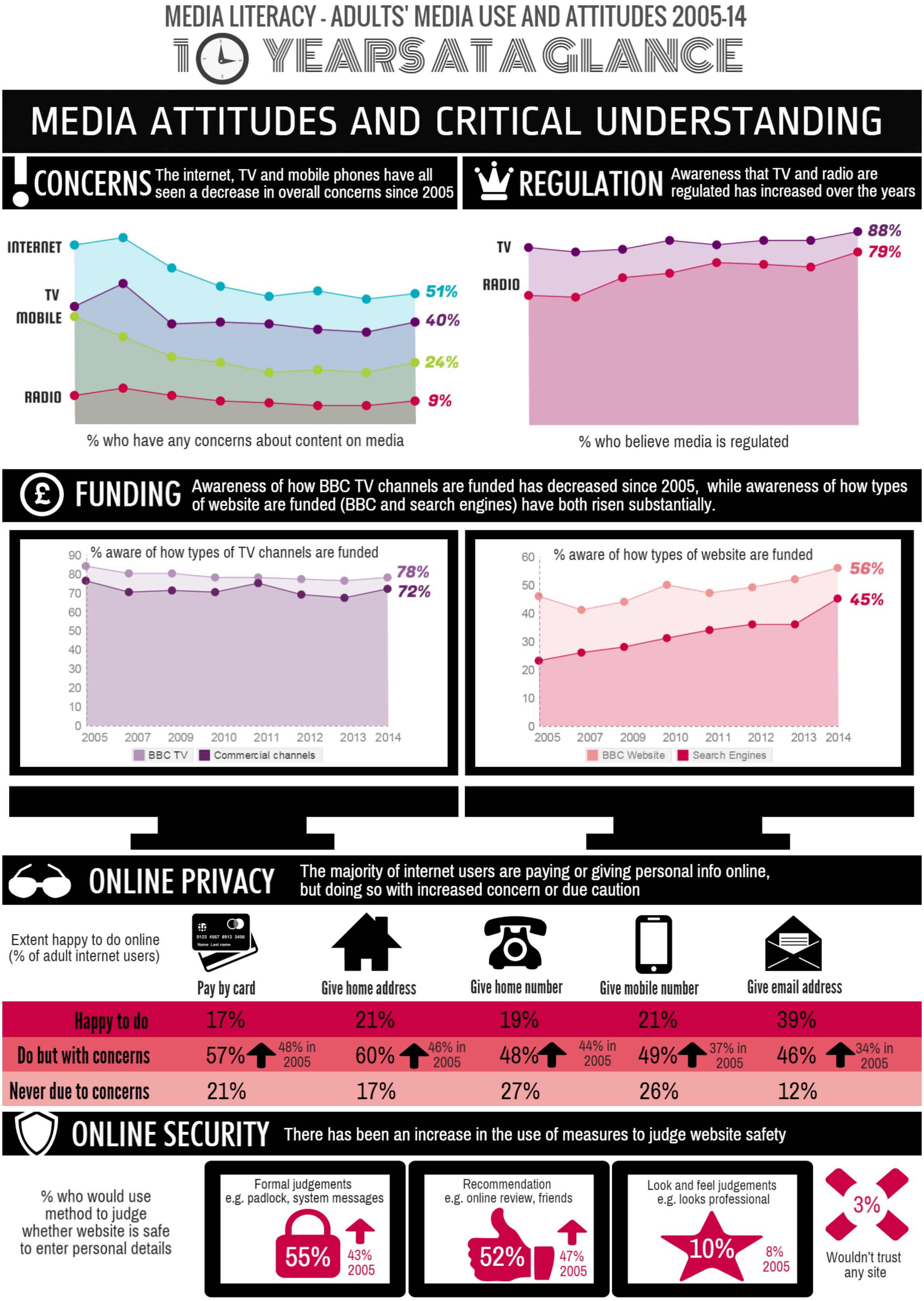
- ***Setting up or maintaining a website or blog*** has always been an activity conducted by a relatively small minority of internet users and has remained at virtually the same levels overall (from 7% to 8%), among 16-24s (10% to 9%) and among those aged 55+ (4% in both years). The proportion of internet users who have <u>ever</u> done this has increased, but only slightly – from 21% in 2005 to 27% in 2014.

Figure 18: Online activities that haven't increased in weekly use since 2005, by age



IN15L/M: How often do you use the internet to <activity>? Answer – at least once a week
Base: All adults who go online in any location on any device (1609 in 2014)

3.5 Media attitudes and critical understanding (2005-2014)



A core element of our media literacy research is evaluating people's attitudes and levels of knowledge about their media environment, including their critical understanding. We examine a range of factors, including:

1. Concerns about media platforms
2. Awareness of, and attitudes towards media funding
3. Awareness of regulation
4. Confidence in using the internet
5. Understanding search engine results pages
6. Attitudes relating to online privacy
7. Judging and implementing online safety and security

Media concerns

Despite having fallen considerably since 2005, concerns with content on the internet are still at higher levels than for other media.

Figure 19 shows the proportion of adult users who cited any concerns with content on TV and radio (broadcast media), comparing 2005 with 2014 by age.

Concerns with content on TV

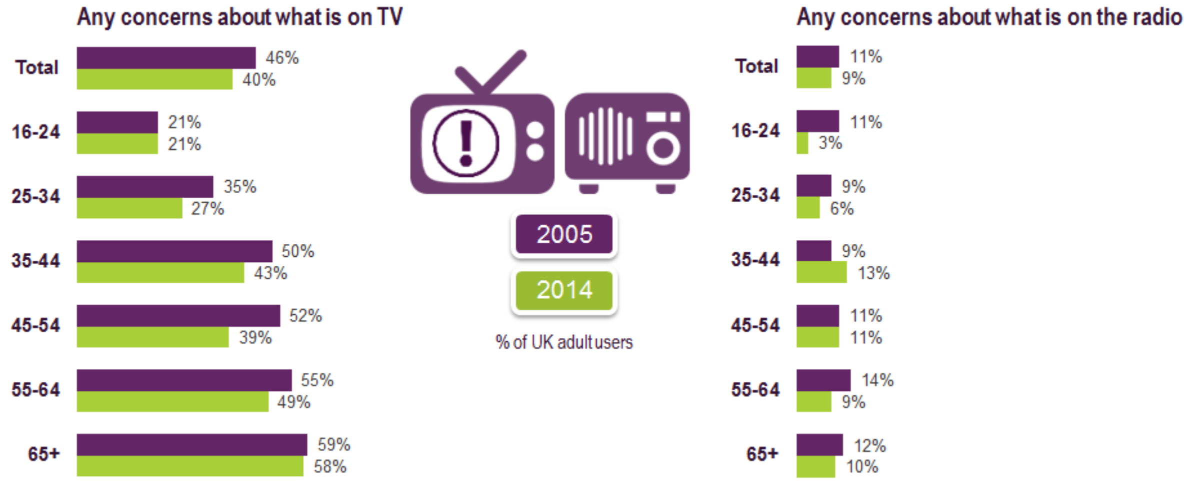
In total 40% of those with a TV set in their household now claim to have any concerns in terms of what is shown on television, compared to 46% in 2005. This small overall decrease is driven by those aged over 25, with 45-54 year olds seeing the steepest fall (from 52% to 39%).

Violence (23%), bad language (17%), and sex (15%) were the chief concerns in 2005. While they still remain prominent, the percentages have roughly halved to 12%, 9% and 7% respectively.

Concerns with content on the radio

There are no specific types of concern that dominate for radio among listeners and this has been consistent since 2005; 4% cite offensive content and 3% advertising/sponsorship in 2014 (the former was 6% in 2005). As a result, overall concerns have been at much lower levels than the other three media since we started measuring it (11% cited any concerns in 2005). This is unchanged since then (9% in 2014), but concerns among 16-24s have decreased (3% from 11%).

Figure 19: Concerns with broadcast media (TV and radio), by age: 2005 vs. 2014



T5/R3: Can you tell me if you have any concerns about what is on TV/radio?
Base: Adults aged 16+ with any TVs in the household (1846 in 2014), adults aged 16+ who listen to the radio

Figure 20 shows the proportion of adults with any concerns with internet content and about mobile phones in general, comparing 2005 with 2014 by age.

Concerns with internet content

The internet has always shown the highest levels of concern across the four types of media. The most cited concerns regarding internet content among users are currently 'offensive/ illegal content' (38%) and 'risk to others/society (28%). The former was also the prime concern in 2005 when 54% cited a concern relating to 'offensive content'; the latter has seen a recent increase from 15% in 2013.

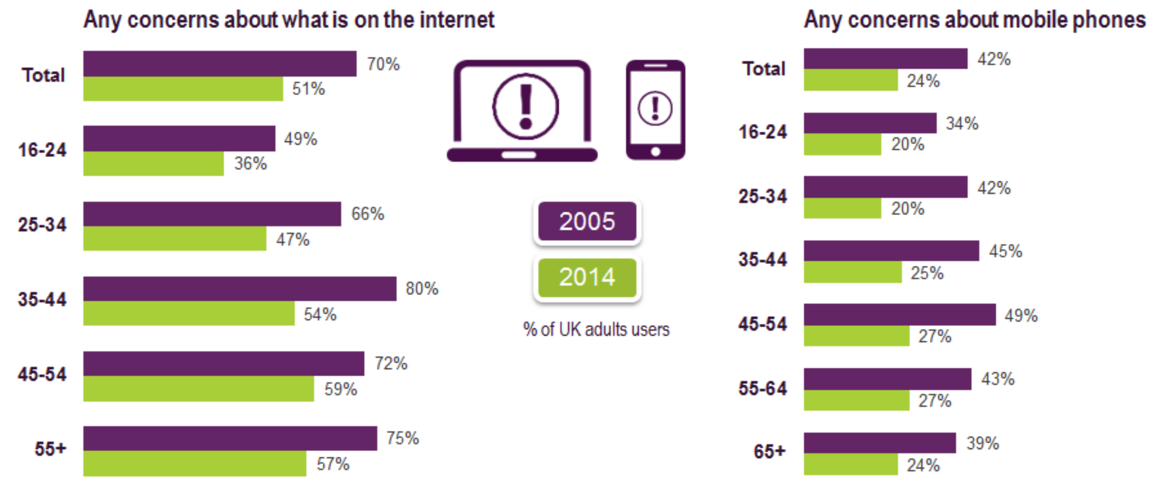
Despite this, the proportion citing any concerns with online content has decreased since 2005 from seven in ten (70%) to half (51%) of internet users. This decrease has been most substantial among 35-44s (from 80% to 54%)

Concerns with mobile phones

Mobile phones differ in terms of the types of concern that we capture. Concerns for the other three media relate to content, whereas for mobiles the focus is on the technology/service. As such, affordability is the primary concern at 11%.

This figure was exactly the same in 2005, but back then the chief concerns were risk related – 21% cited health risks (4% in 2014), and 14% risks to other people/society (8% in 2014). As these types of concern have fallen over time the overall level has fallen considerably, from 42% to 24%. This is universal across all age groups, particularly 25-34 year olds which has more than halved (from 44% to 20%).

Figure 20: Any concerns with the internet and mobile phones, by age: 2005 vs. 2014



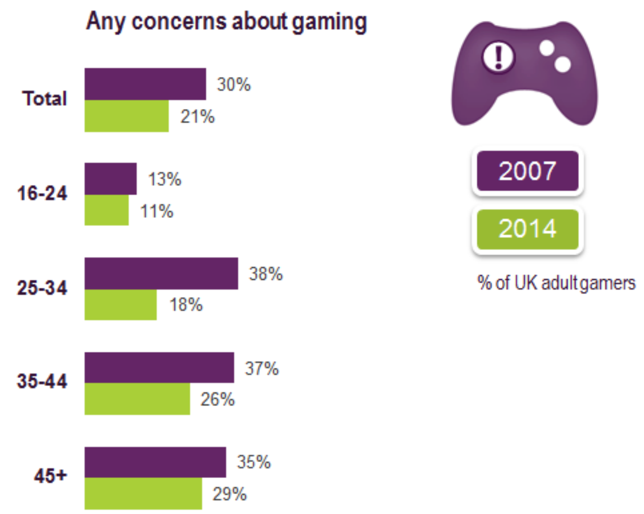
IN34/M3: Can you tell me if you have any concerns about what is on the internet/about mobile phones?
Base: Adults aged 16+ who go online at home or elsewhere (1609 in 2014) / who personally use a mobile phone (1670 in 2014). Note: Base of internet users aged 65+ too low to analyse in 2005.

Concerns with gaming

With regards to concerns about gaming, this topic was introduced in 2007. Since that time there has been a decrease in overall concerns among gamers, from 30% to 21%. This has mainly been driven by a significant decrease among 25-34s (from 38% to 18%), as shown in Figure 21.

Violent content (19%) was the primary concern in 2007. Although it is still a primary concern in 2014 it has decreased to 9%, and is now at the same level as 'unsuitable for children' (10% compared to 10% in 2007).

Figure 21: Any concerns with gaming, by age: 2007 vs. 2014



G3: Can you tell me if you have any concerns about gaming?
Base: Adults aged 16+ who play games (743 in 2014).

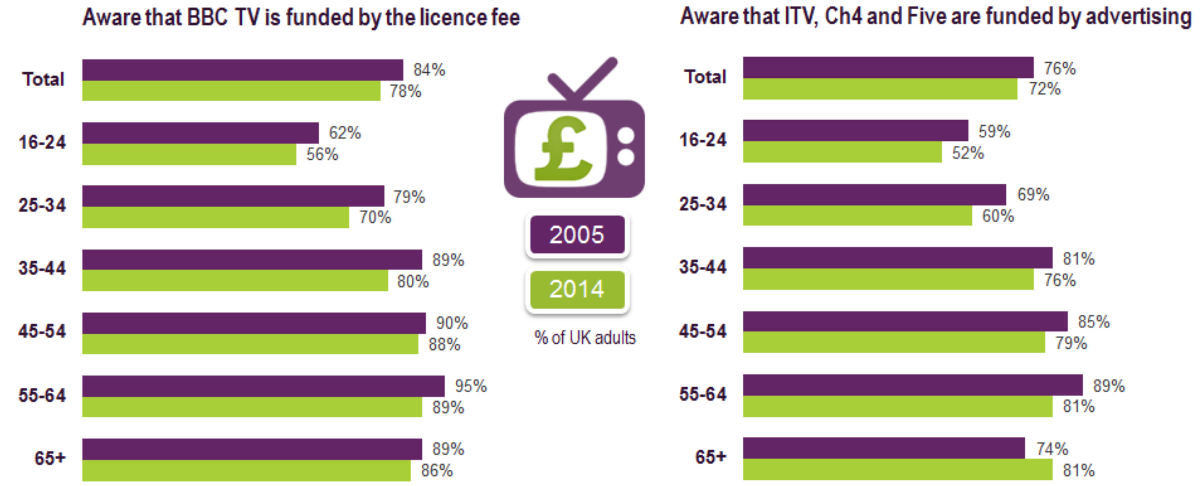
Media funding

Awareness of how BBC TV channels are funded has decreased since 2005, while awareness of how types of website are funded (BBC and search engines) have both risen substantially.

Each wave we have asked people to tell us (without a prompted list) how they believe two types of TV channel - BBC and commercial[21] – are mainly funded. Figure 22 shows the proportion of all adults, and of each age group, who gave the correct answers (licence fee for the former, and advertising for the latter) in 2005 and 2014.

- For BBC TV, there has been a significant decrease for 35-44s (from 89% to 80%). However, those aged 16-24 have always shown the lowest awareness that it is funded by the licence fee – it currently stands at 56% versus 62% in 2005. Overall awareness has fallen from 84% to 78%.
- For ITV, Channel 4 and Five, there has been no significant change over time at an overall level (76% in 2014 vs. 72% in 2005) or by age group. Again the 16-24 age group have the lowest awareness that these channels are funded by advertising at 52% (59% in 2005).

Figure 22: Awareness of how types of TV channel are funded, by age: 2005 vs. 2014



T3/T4: How would you say BBC TV programmes are mainly funded? How would you say programmes are mainly funded on ITV, Channel 4 and Five?
Base: All respondents (1890 in 2014)

A corresponding question is also asked for the internet, gauging the awareness of how two types of website are funded – the BBC website and search engines. Results for 2005 and 2014 are displayed in Figure 23.

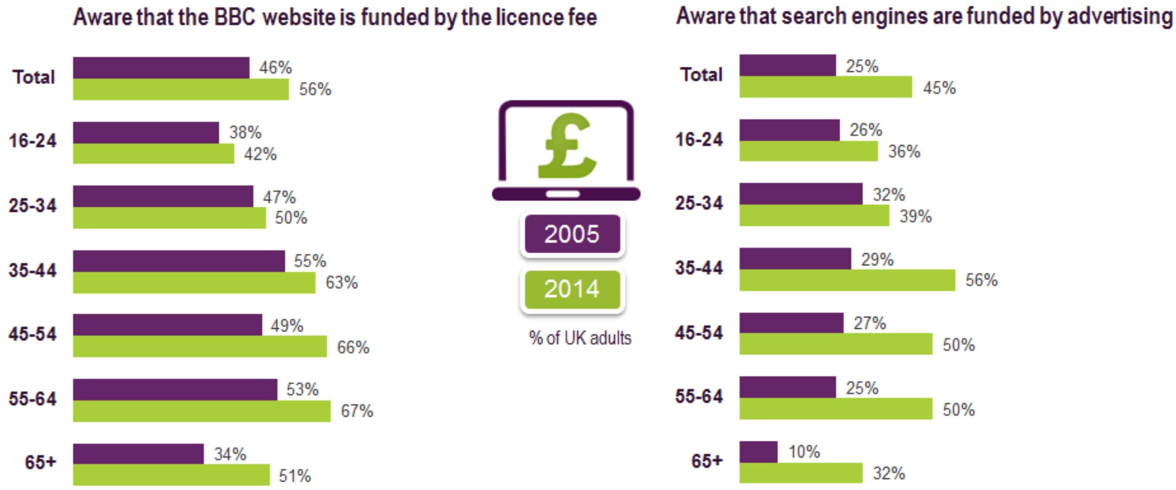
In contrast to TV, these measures have moved in a positive direction, substantially in the case of search engines. Having said this it's worth noting that it is assessed among all adults, so increased knowledge could also be correlated to an increase in take-up of the internet over this time[22].

[21] 'Commercial' channels are prompted as the three commercial PSB channels - ITV, Channel 4 and Five

[22] Awareness that the BBC website is funded by the licence fee was 57% among internet users in 2005 and 60% in 2014. Awareness that search engines are funded by advertising was 37% among internet users in 2005 and 49% in 2014.

- Awareness that the BBC website is funded by the licence fee has risen by ten percentage points, from 46% to 56%. As with television, awareness has always been lower for 16-24s and this hasn't increased since 2005 (42% v 38%).
- In comparison, awareness that search engines are funded by advertising[23] is at a slightly lower level than for the BBC at 45%. However, the upturn since 2005 has been much higher (from 25%). Large increases have been observed across all age groups, but particularly among 35-44s where it has nearly doubled from 29% to 56%.

Figure 23: Awareness of how types of website are funded, by age: 2005 vs. 2014



IN32/IN33: How do you think the BBC's website is mainly funded? How do you think search engine websites such as Google or Ask.com are mainly funded?
Base: All respondents (1890 in 2014

Adult internet users under the age of 65 are more inclined to care about who owns websites, or how they are funded, than they were in 2007.

In 2007 we introduced a question assessing critical awareness of internet funding, which asked to what extent they agree with the statement *"As long as the internet provides good websites it doesn't really matter who owns the websites or how they're funded."*

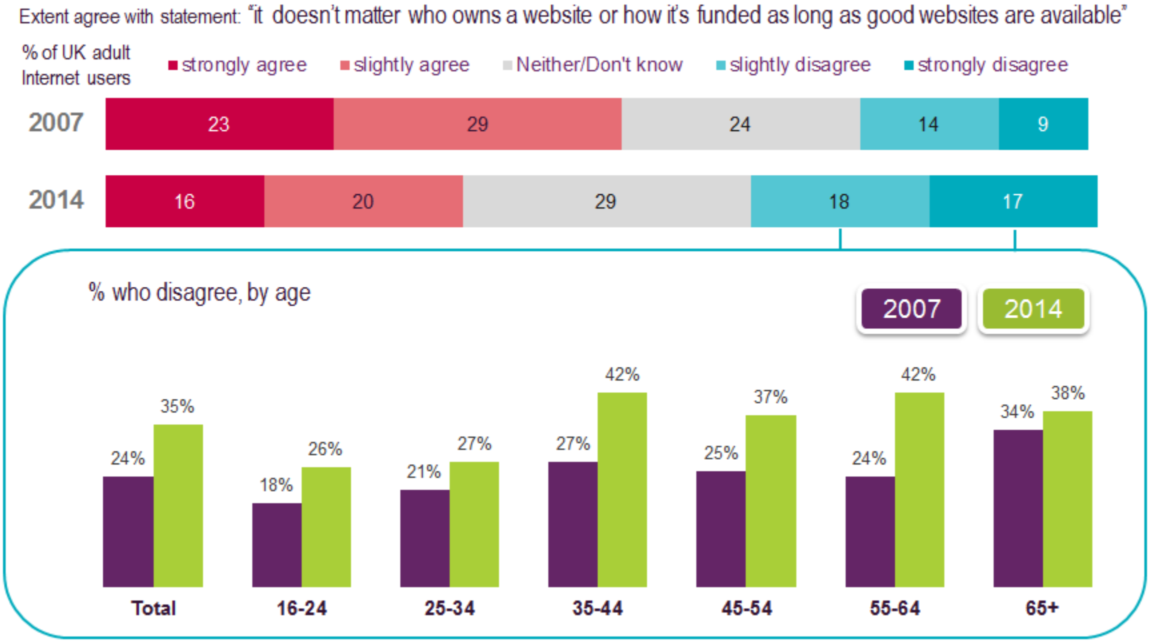
Figure 24 first of all shows the breakdown of responses in 2007, compared to 2014, and then the proportion of internet users in each age group who agreed or disagreed (slightly or strongly) for both years.

In 2007 there was a clear skew towards agreement with the statement (52% either strongly or slightly agreed), while a quarter had a neutral view (24% said neither or don't know) and the same proportion (24%) disagreed strongly or slightly. Since this time, total agreement (36%) and disagreement (35%) have become balanced, with more neutrality evident (29%). Furthermore, the proportion of adults who strongly disagree has doubled from 9% to 17%.

Disagreement has increased for all age groups between 35 and 64. For example, in 2007 the figure for those aged 55-64 was 24%, and this has almost doubled to 42%.

[23] Awareness is taken from two coded responses deemed as correct - 1) 'Advertising on the website' and 2) 'Advertisers pay when users click through from sponsored links to their website'

Figure 24: Attitudes towards website ownership and funding: 2007 vs. 2014



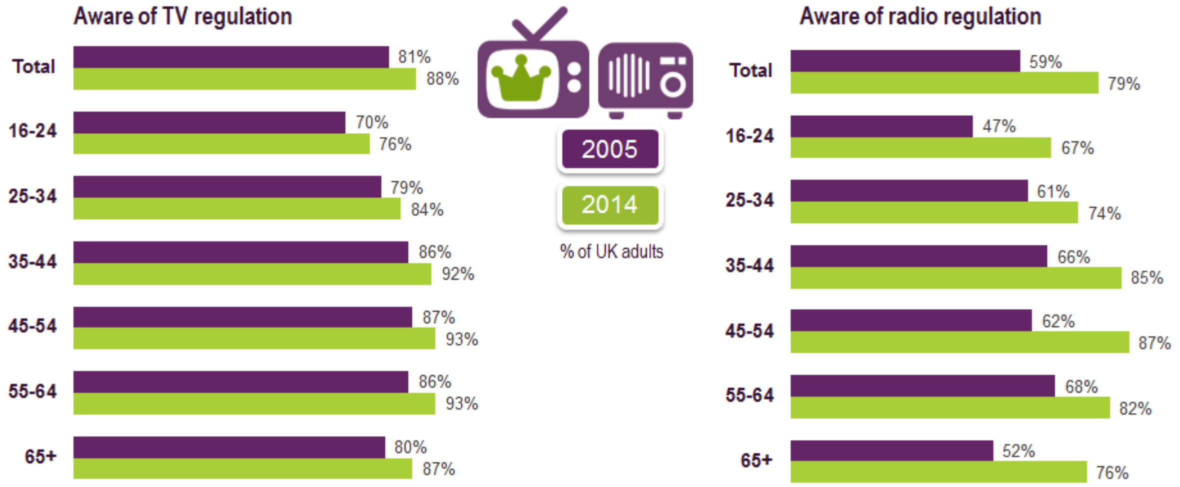
IN35F. As long as the internet provides good websites it doesn't really matter who owns the websites or how they're funded?
Base: All who go online at home or elsewhere on any device (1609)

Media regulation

Adults are more aware of broadcast media regulation than in 2005, particularly radio regulation (although awareness of TV regulation is still higher).

There has been an increased awareness that regulation exists for both television and radio. The former is at a higher level than the latter - 88% compared to 79%. However, awareness of radio regulation has increased more than that of TV, with a 20 percentage point rise from 2005 when it was 59%. By age, awareness has been consistently lower among 16-24s than other ages - 76% for TV and 67% for radio. These figures were 70% and 48% respectively in 2005.

Figure 25: Awareness of TV and radio regulation, by age: 2005 vs. 2014



T6/R4: As far as you know, are TV programmes/ is radio regulated?
Base: All respondents (1890 in 2014)

Confidence in using the internet

A majority of internet users claim confidence in various aspects of using the internet, but the levels have seen little change over the years.

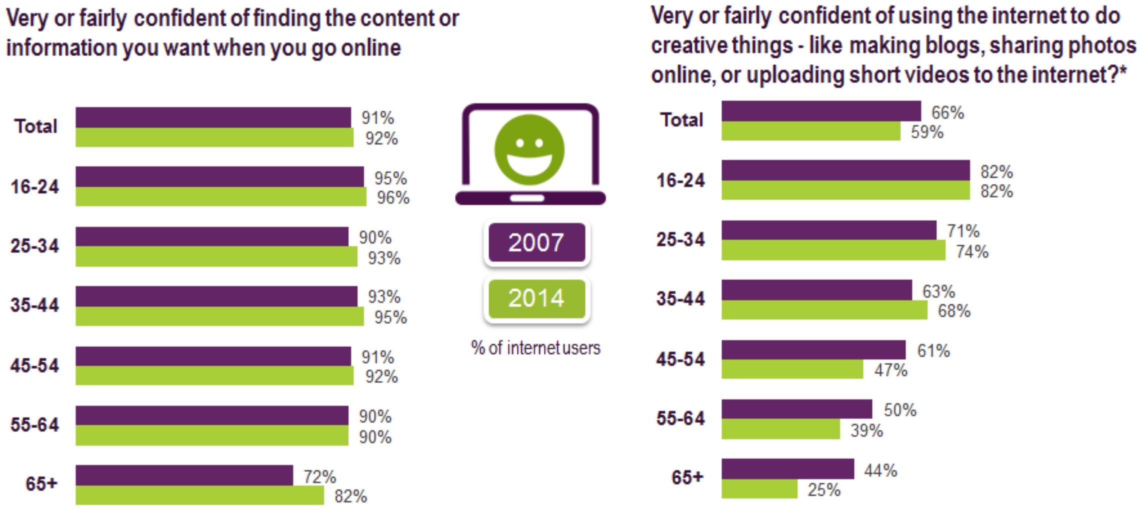
In 2007 we started to pick up on signs of confidence with using the internet among a majority of users. From our research that year we learnt that around six in ten considered themselves very confident in terms of finding things online (58%), with nine in ten (91%) considering they were at all confident (i.e. including 'fairly confident').

In 2007 we also asked the extent to which internet users were confident of telling if something was truthful and reliable online (not asked in 2014). Six in ten (59%) cited that they were at all confident (very or fairly).

As shown in Figure 26, confidence in finding things online has remained at the same levels since 2007 across all age groups[24]

In contrast to finding things online, confidence in doing creative activities appears to have decreased at the overall level from 66% to 59%. This appears to be driven by older internet users. While the same proportion of 16-24s (82%) cite being very or quite confident of using the internet to do creative things (such as making blogs, sharing photos online, or uploading short videos), the figures for those aged 65+ have decreased from 44% to 25%. It is important to bear in mind that this could be due to a combination of factors relating to changes in the question wording[25] and the profile of older internet users[26].

Figure 26: Confidence online: 2007 vs. 2014



IN13B/C: How confident are you 1) that you can find the content or information you want when you go online 2) using the internet to do creative things - like making blogs, sharing photos online, or uploading short videos to the internet?
Base: All internet users (1609 in 2014)

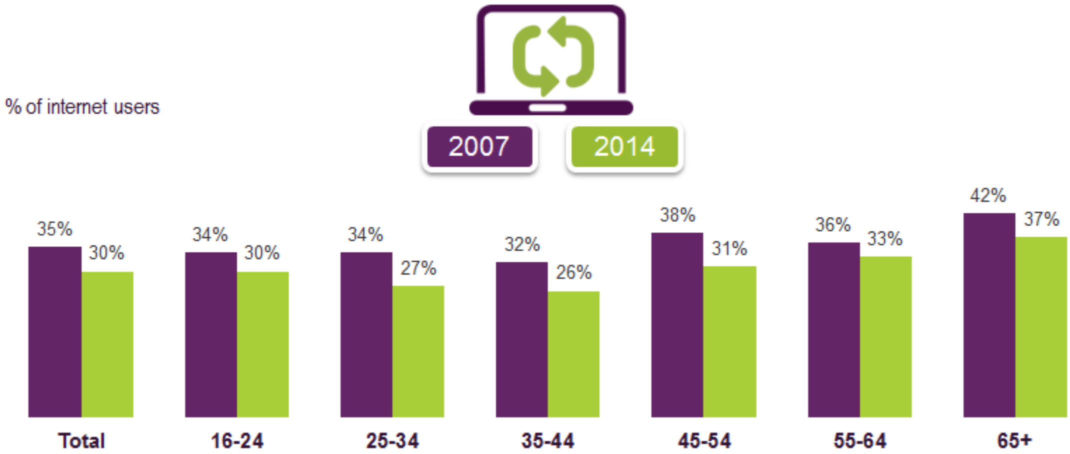
[24] Note that for those aged 65+the difference is not statistically significant at 99% (or 95%) due to the low effective sample size for internet users aged 65+ in 2007 (54).

[25] The question in 2007 was "How confident are you in using the creative elements that media such as internet and mobile phones offer? This includes creating blogs (or online diaries), editing photos and sharing them with friends and uploading short videos from a mobile phone?"

[26]The increase in overall internet use among these ages since 2007 may mean that there is less inclination towards creative activities among these age groups.

Despite (or explaining) this apparent confidence in 2007, over one third (35%) of internet users said that they only used websites they had used before. Since 2007 we have continued to ask this question and the difference in responses between that year and 2014 are shown in Figure 27 across the age groups. None of the decreases shown in the chart are statistically significant.

Figure 27: Proportion of internet users who only use websites they have visited before: 2007 vs. 2014



IN14. In most weeks when you go online using any type of computer (so a PC, laptop, netbook or tablet computer like an iPad), a mobile phone, a games console or a media player, would you say that you...?
Base: All internet users (1609 in 2014)

Understanding search engine results

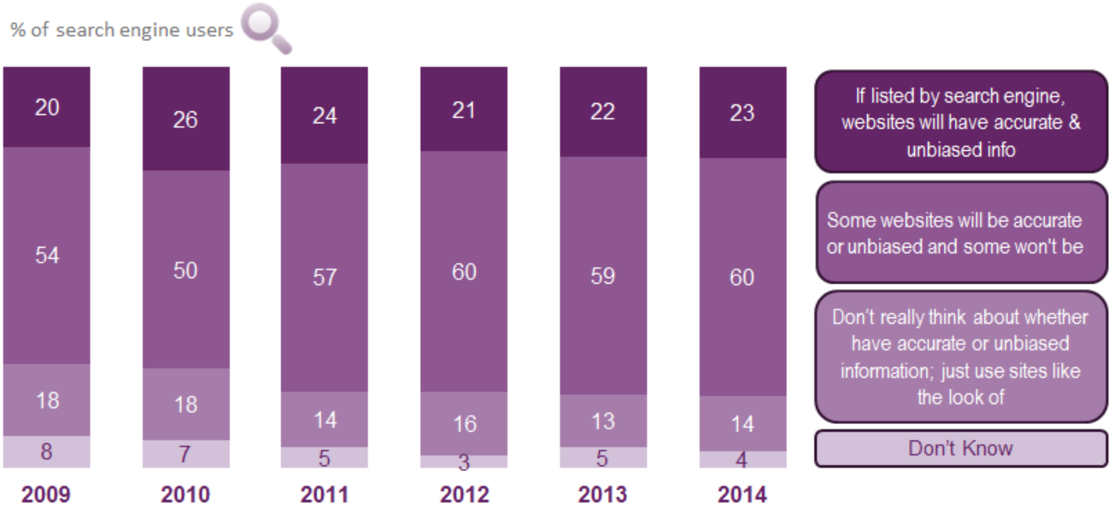
Opinions about the potential for inaccuracy or bias of search engine results have remained similar over time, with little variance by age.

An important measurement of critical understanding which we introduced to the survey in 2009 was the extent to which people understand the potential for inaccuracy or bias in the results they get from search engines. This question gives an indication as to the level of understanding about how search engines work and the extent of editorial gatekeeping they provide.

The results have seen little fluctuation over time, as displayed in Figure 28 – six in ten (60%) search engine users understand that some results will be accurate and unbiased, while others won't be. This hasn't changed to a statistically significant level since 2009 when it was 54%. In contrast to most of the measurements assessed so far in this section this is consistent across both younger and older demographics (e.g. 56% of 16-24s versus 62% of those aged 65+).

Close to a quarter (23%) of search engine users feel that if it is listed by a search engine, a website will have accurate and unbiased information, and this hasn't changed to a statistically significant level over time (20% in 2009).

Figure 28: Opinions on the accuracy of search engine results: 2009-14



IN45. When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages?
Base: All adults aged 16+ who ever use search engines (1516 in 2014).

Online privacy

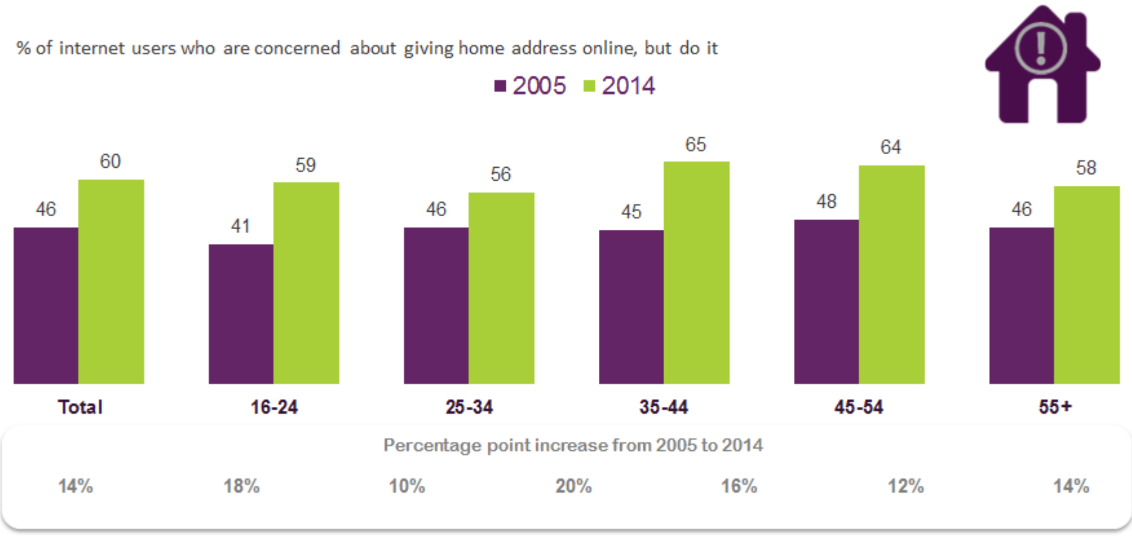
The majority of internet users are sharing personal information online, but there is evidence of added caution in doing so over the years.

Another key area of media literacy is the extent to which people are aware and savvy about giving out personal information online. We have asked the same question since 2005 about whether respondents ever provide this information, and if so whether they do so with or without concerns.

For each of the types of personal information we ask about - paying by credit or debit card online, giving home address details, home number, mobile number and personal email address - the majority of online users say they do provide the details. For example, 81% of adults say they give out their home address details online in 2014, and this percentage has remained virtually the same since 2005 (82%). However, the proportion of internet users who are happy to give out their information has fallen since 2005 for all of the types. For example, 36% were happy to give out their home address details in 2005, and this figure is now 21%.

Consequently, it appears that more caution has crept in over time, and this is highlighted by the fact that three quarters of these people (60% of internet users) have concerns about giving out their home address details online, compared to 46% in 2005. As shown in Figure 29 steady (but not significant in all cases) increases are spread across all ages, and this trend is mirrored for all other types of personal information asked about. Despite this, four in ten (43%) of internet users say they skim-read website terms and conditions / privacy statements.

Figure 29: Concern about giving home address details online: 2005 vs. 2014



IN38. …I'd like you to say how you would feel about doing this in terms of any security concerns…. Entering your home address details? Answer - Have some security concerns about doing this, but would do it
Base: All who use the internet at home (2005) / All who go online at home or elsewhere on any type of device (1609 in 2014)

Online safety and security

The majority of internet users are using technical indications such as padlocks and system messages to measure website safety, and this has increased among 35-64 year olds since 2005.

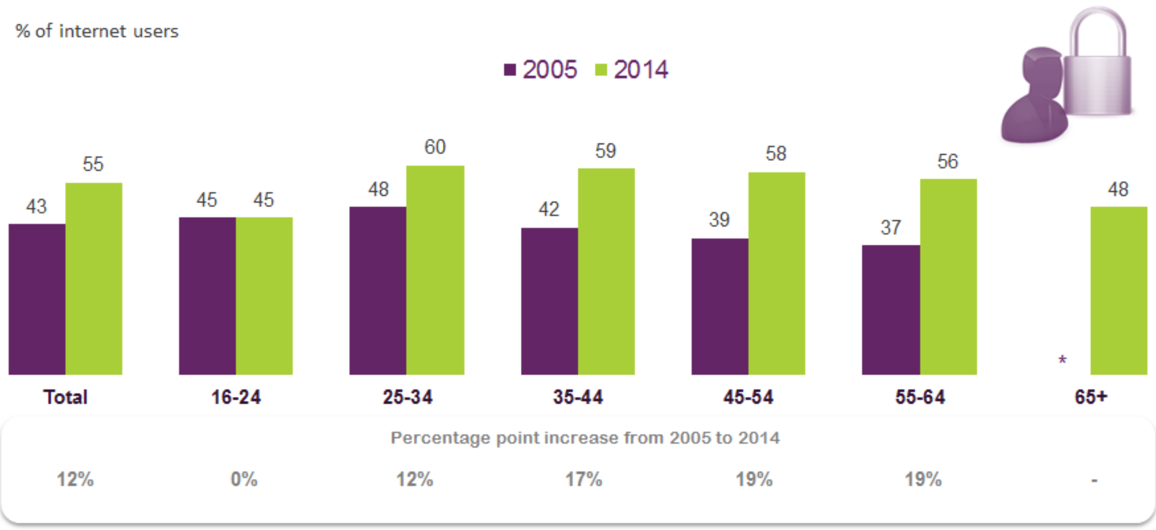
In 2005 six out ten (59%) internet users cited that they could block computer viruses with confidence (rising to 67% of 25-34s). A further 9% of internet users said they did it with difficulty, and 17% said they got someone else to do it for them. So in total 86% of internet users were adopting security measures when online.

Although we don't measure this type of confidence anymore, a similar proportion (88%) of adult internet users say that they adopt any security measures in 2014, ranging from a third (33%) who delete web-browser cookies to three quarters (75%) who use anti-virus software. In addition to this, eight in ten (80%) adults cite being very or fairly confident of staying safe online.

As a result of, or in spite of, the majority of internet users declaring confidence in their ability to stay safe and (as mentioned earlier), two thirds (64%) use the same password for most or all websites. However, in terms of the ways in which people actively evaluate whether it is safe to provide personal details, the use of 'formal judgements' *(e.g. padlocks or system messages)* has increased, from 43% to 55%.

While this has not changed among 16-24 internet users (45% in 2014 vs. 46% in 2005), it has done so fairly substantially among those aged 35 and over. For example, the figure for adults aged 45-54 has increased by 19 percentage points (from 39% to 58%).This is displayed in Figure 30 below.

Figure 30: Use of formal judgements before entering details online: 2005 vs. 2014

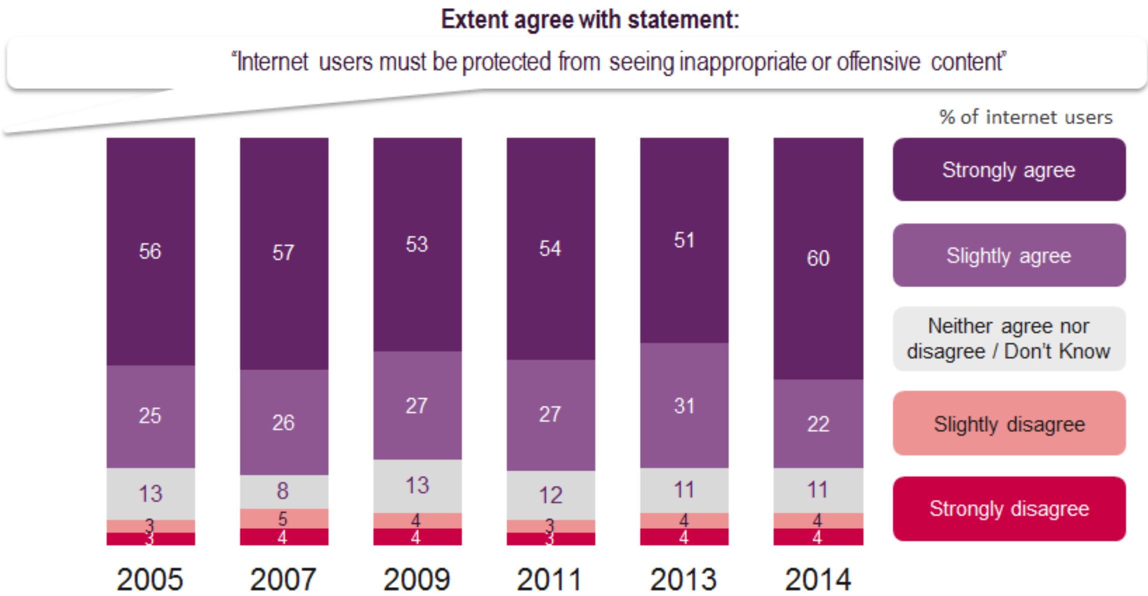


IN39. Could you tell me whether you would make a judgement about a website before entering these types of details? IF NECESSARY - Your home address or phone number, your credit or debit card details, and so on. Answers such as padlocks and system messages coded as 'formal' judgements.
Base: All who use the internet at home (2005) / All who go online at home or elsewhere on any type of device (1609 in 2014)

Agreement that internet users must be protected from inappropriate or offensive content is at its highest levels since 2005.

Adult internet users have also been asked since 2005 the extent to which they agree internet users must be protected from seeing inappropriate or offensive content online. As shown in Figure 31 this has remained fairly consistent over the years, and overall agreement (82%) has not changed since 2005 (81%). Similarly six in ten adult (60%) strongly agree with the statement, as was the case in 2005 (56%).

Figure 31: Opinions on protection from inappropriate or offensive content: 2005-14



IN35E: Internet users must be protected from seeing inappropriate or offensive content?
Base: All who go online at home or elsewhere on any type of device (1609 in 2014)

Section 4

Digital media take-up and use

4.1 Section overview

This section looks at UK adults' access to, and personal use of, media devices in their home and elsewhere. It first of all focuses on the devices used to go online both at an overall level and by location, and then details the volume of internet use and range of websites visited. This is followed by a summary of activities undertaken when online (this is expanded upon at a category level in Section 5).

One of the core benefits of our media literacy tracker is its ability to show how different media (not just the internet) compare to each other in levels of consumption and use over time. Therefore, this section also documents the ownership of mobile phones (smartphones in particular), and summarises the activities that they are used for. It explores app usage on app-enabled devices and ownership of DVRs. Finally it assesses which media are used regularly, and which devices adults would miss the most.

4.2 Key Findings

- A TV set is used daily by more than nine in ten adults (92%), and is the device most likely to be missed by all adults (37%); this is particularly the case among those aged 55+, DEs and women, but is not the case for all age groups under the age of 45 (where the mobile phone is cited as the device most likely to be missed).

- Mobile phone ownership has remained relatively stable since 2013 (showing a slight decline, from 92% to 89%). Smartphone ownership figures, while appearing to have increased, have not done so at a statistically significant level (66% vs. 62% in 2013).

- The decline in ownership of non-smartphone handsets since 2013 is attributable to a decline in ownership among men and 55-64s.

- Those aged under 55 are more likely than all adults to use a smartphone and under 45s are more likely to miss their mobile phone the most.

- Smartphones continue to influence how people go online both at home and elsewhere. Six in ten adults use a smartphone to go online at home (59%) while one in two (51%) use a smartphone outside of the home. This is the only device used to go online in both locations by a majority of adults.

- Compared to 2013 the overall incidence of internet use at home or elsewhere on any type of device hasn't increased to a statistically significant degree (86% from 83%). However, there has been an increase in the proportion of adults going online both at home and elsewhere (67% vs. 56% in 2013) and a decline in the proportion of adults only going online at home (17% vs. 26% in 2013).

- While the overall incidence of going online is unchanged, 65-74s are now more likely to go online - 70% compared to 56% in 2013.

- Compared to 2013, adults are more likely to go online through a tablet computer (39% vs. 30%).

- Other devices tend to supplement rather than substitute for PC/laptop/netbook access, with around one in twenty adults (6%) only using other devices to go online at home or elsewhere. This incidence, however, rises to one in ten (10%) among DEs.

- There has been an increase in the self-reported volume of internet use per week, with UK adults spending on average 20.5 hours online, compared to 16.9 in 2013.

- Newer users are categorised as those who first went online less than five years ago. Older internet users (22% of those aged 65+) and those in the DE socio-economic group (25%) are more likely to be newer internet users, compared to all internet users (13%).

- There is a significant degree of overlap between newer and narrow internet users for older adults and DE adults, with newer users more likely to be narrow users of the internet. Narrow users are defined as those who carry out 1-6 of 17 types of online activity, and they comprise one in ten (11%) of all internet users.

- More than half of all non-users are aged 65 and over (62%) and half are in DE households (50%).

- Nine in ten (90%) who go online on a smartphone or tablet use apps on these devices and there is a clear preference among app users for accessing content through apps rather than browsers for some types of content – unless they are searching for information, where browser use prevails

4.3 Internet take-up and use

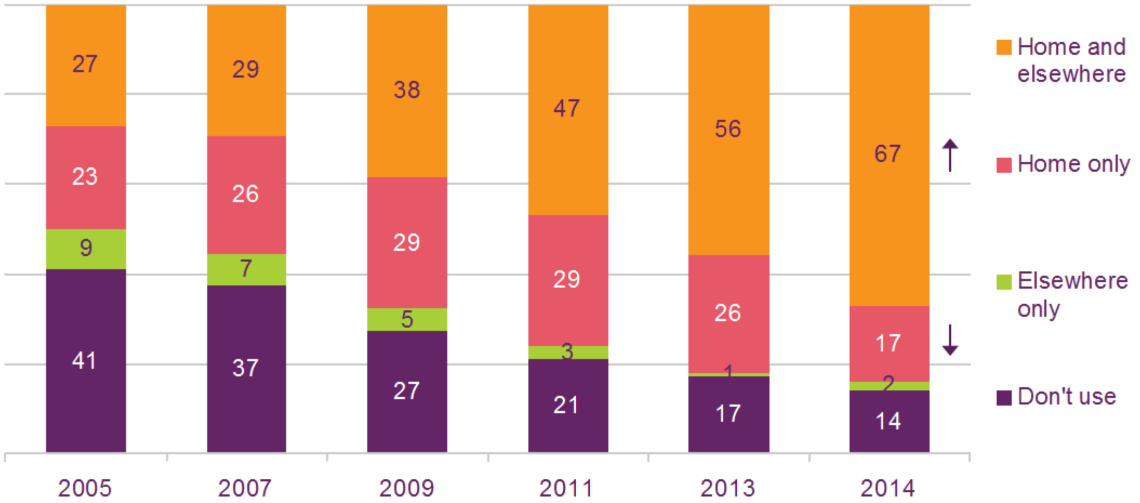
Internet use, by location and devices

More than four in five adults use the internet anywhere, on any device.

As shown in Figure 32, two thirds of adults (67%) use the internet both at home and elsewhere, one in six (17%) use it at home but not elsewhere, and just 2% only do so in places outside of the home. Therefore, close to nine in ten (86%) of all UK adults say they use the internet (on any device), either at home or elsewhere in 2014.

While there has been no significant change in the overall proportion of adults who go online (86% vs. 83% in 2013), adults are more likely to use the internet both at home and elsewhere (67% vs. 56%), and are less likely to just use the internet at home (17% vs. 26%).

Figure 32: Where the internet is used by UK adults: 2005-2014



Derived from several questions - IN1/ IN2/ IN3 / IN4 (See questionnaire)
Base: All adults aged 16+ (1890 in 2014).
Arrows show significant changes (99% level) between 2013 and 2014

Two thirds of those aged 75+ and three in ten 65-74 year olds do not use the internet at all. The latter is the only age group to have increased in terms of internet take-up since 2013.

As shown in Figure 33 those under the age of 45 are more likely than all adults (67%) to use the internet both at home and elsewhere (83% for 16-24s, 88% for 25-34s and 86% for 35-44s). Each of these age groups is less likely than all adults (17%), to use the internet only at home (8-11%).

Corresponding with the above, use of the internet at home and elsewhere is less likely among 55-64s (50%) and 65-74s (32%), and both these age groups are more likely to say they use the internet only at home (29% for 55-64s and 35% for 65-74s).

Those aged 65 and over are more likely than all adults (14%) to say that they do not use the internet on any device in any location (30% for 65-74 and 67% for 75+). However, although not shown on the chart, 65-74s are more likely (70%) than they were in 2013 (56%) to say they go online in any location. This is the only age group that is more likely to go online compared to 2013.

Adults in the AB (79%) and C1 (73%) socio-economic groups are more likely to use the internet both at home and elsewhere, compared to all adults (67%). A quarter of DEs don't use the internet at all, compared to less than one in ten AB (5%) and C1 (9%) adults.

Figure 33: Where the internet is used by UK adults, by demographic group

Derived from several questions - IN1/ IN2/ IN3 / IN4 (See questionnaire)
Base: All adults aged 16+ (1890 in 2014, 254 aged 16-24, 288 aged 25-34, 327 aged 35-44, 284 aged 45-54, 276 aged 55-64, 221 aged 65-74, 240 aged 75+).
Arrows show significant differences (95% level) by age compared to all adults.

When going online six in ten UK adults use a mobile phone, and four in ten a tablet computer. The latter has increased since 2013.

In addition to asking adults about their use of the internet through a computer (desktop, laptop or netbook) at home, we have also asked about various alternative devices to go online since 2009. The specific devices asked are:

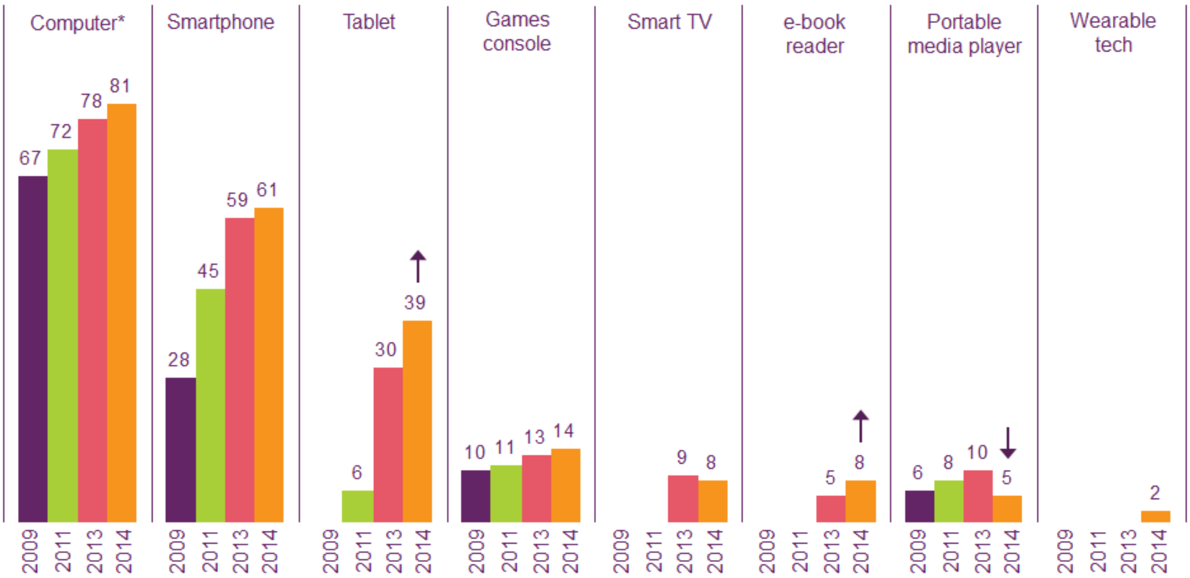
- Smartphone
- Tablet (such as an iPad or Kindle Fire, included since 2010)
- Games console or handheld games player
- Smart TV (included since 2013)
- e-book reader (such as a standard Kindle, included for the first time in 2012)
- Portable media player (such as an iPod Touch)
- Wearable technology (such as a smartwatch or Google Glass, added in 2014)

As shown in Figure 34, four in five (81%) UK adults say they go online at home or elsewhere through a computer[27]. Six in ten (61%) adults use a smartphone to go online, while four in ten (39%) use a tablet. One in seven go online on either a fixed or portable games console (14%) with each of the other internet enabled devices being used by around one in ten or fewer adults.

[27] Prior to 2014 use of a computer to go online was only based on use within the home and not elsewhere. While not shown in the chart, in 2014 the figure for use of a computer to go online at home is 77%, unchanged since 2013.

Since 2013, adults are more likely to go online using a tablet (39% from 30%) and through an e-book reader (8% from 5%). They are less likely to use a portable media player to go online (5% from 10%).

Figure 34: Devices used to go online: 2009-14

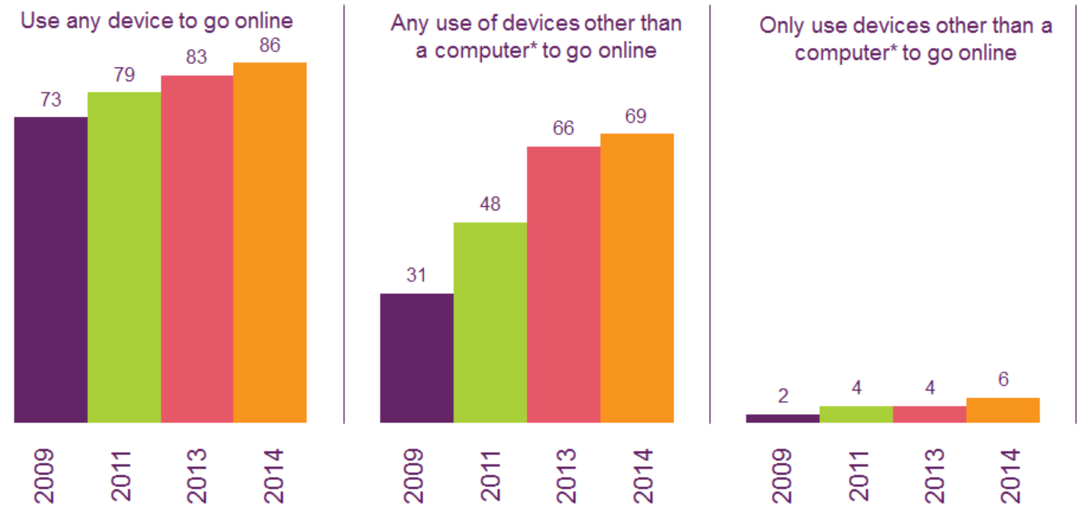


Derived from several questions - IN1/ IN2/ IN3 / IN4 (See questionnaire)
Base: All adults aged 16+ (1890 in 2014).
Arrows show significant changes (99% level) between 2013 and 2014

As shown in Figure 35 and mentioned earlier, use of any device to go online in any location is unchanged since 2013 (86% vs. 83%). While seven in ten adults (69%) use a device other than a computer (*desktop/laptop/netbook), this is also unchanged since 2013.

Use of alternative devices to go online is almost always in addition using a computer to go online. Only six percent use an alternative device, and do not use a computer, to go online. This is also unchanged since 2013.

Figure 35: Use of alternative devices to go online: 2009-14



Derived from several questions - IN1/ IN2/ IN3 / IN4 (See questionnaire)
Base: All adults aged 16+ (1890 in 2014).

Adults aged 35-54 are the most likely to use a tablet to go online.

As shown in Figure 36, those under the age of 55 are more likely to go online using any type of device than all adults, while the reverse is true for those aged 65 and over. However, there are differences by age with regards to the types of devices used to go online:

- At around nine in ten, those aged 25-54 are more likely to go online using a computer, compared to 65-74s (67%) and in particular 75+ year olds (31%). In fact these two older age groups are less likely to go online via all devices (except e-books and portable media players, for aged 65-74s).

- Use of any alternative devices (those other than a computer) to go online is more likely among 16-54s than older adults. For example, at eight in ten, all age groups under the age of 45 are more likely to go online on a smartphone (61% for all). Games consoles are higher for 25-44s at around a quarter, while the use of a tablets (50%) and smart TVs (15%) to go online are more popular among 35-54s than all adults (39% and 8% respectively).

Figure 36: Devices used to go online at home or elsewhere, by age

	All adults	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1890**	**254**	**288**	**327**	**284**	**276**	**221**	**240**
Computer*	81%	84%	89% ↑	92% ↑	89% ↑	79%	67% ↓	31% ↓
Smartphone	61%	81% ↑	84% ↑	83% ↑	67%	37% ↓	18% ↓	4% ↓
Tablet	39%	42%	44%	50% ↑	49% ↑	33%	23% ↓	13% ↓
Games console	14%	26% ↑	23% ↑	17%	15%	4% ↓	1% ↓	0% ↓
Smart TV	8%	10%	11%	15% ↑	8%	2% ↓	4% ↓	1% ↓
E-book reader	8%	8%	8%	11%	10%	9%	6%	3% ↓
Portable media player	5%	8%	3%	7%	6%	2% ↓	4%	1% ↓
Wearable tech	2%	1%	5% ↑	2%	1%	0%	0% ↓	0% ↓
Use any device to go online in any location	86%	93% ↑	97% ↑	98% ↑	93% ↑	84%	70% ↓	33% ↓
Use of devices other than a computer to go online	69%	86% ↑	89% ↑	88% ↑	78% ↑	50% ↓	35% ↓	15% ↓
Only use devices other than a computer to go online	6%	9%	7%	6%	4%	5%	2% ↓	2% ↓

Derived from several questions - IN1/ IN2/ IN3 / IN4 (See questionnaire)
Base: All adults aged 16+ (1890 in 2014).
Arrows show significant differences (95% level) by age compared to all adults.

Adults in the DE socio-economic group are more likely to use only an alternative device to go online.

There are also differences by socio-economic group in terms of the devices used to go online, and this is displayed in Figure 37. As well as being more likely than all adults (81%) to use a computer to go online (92%), AB adults are also more likely to use a smartphone (71% vs. 61%), a tablet (55% vs. 39%), a Smart TV (13% vs. 8%) and an e-book reader (13% vs. 8%). While eight in ten (80%) ABs use any alternative device to a computer to go online, they are less likely to use *only* an alternative device (2% vs. 6% of all adults).

Compared to all UK adults, those in the DE socio-economic group are less likely to use most types of device to go online. Three quarters of DEs (75%) go online using any device, with nearly two in three using the internet through a computer (65% vs. 81% for all adults). While DE adults (57%) are less likely than all adults (69%) to use alternative devices to a computer, they are more likely to use *only* an alternative device (10% vs. 6%).

While men are as likely as women to go online using any device, they are more likely to go online using three particular devices: games consoles (18% vs. 11%), Smart TVs (11% vs. 6%) and wearable technology (2% vs. 1%).

Figure 37: Devices used to go online, by socio-economic group and gender

	All adults	AB	C1	C2	DE	Male	Female
Base	**1890**	**430**	**551**	**376**	**533**	**927**	**963**
Computer*	81%	92% ↑	86% ↑	78%	65% ↓	81%	80%
Smartphone	61%	71% ↑	65%	57%	48% ↓	60%	61%
Tablet	39%	55% ↑	42%	34%	25% ↓	39%	39%
Games console	14%	14%	16%	13%	13%	18% ↑	11%
Smart TV	8%	13% ↑	9%	7%	5% ↓	11% ↑	6%
E-book reader	8%	13% ↑	10%	6%	3% ↓	9%	8%
Portable media player	5%	7%	5%	4%	3%	6%	4%
Wearable tech	2%	2%	2%	1%	1%	2% ↑	1%
Use any device to go online in any location	86%	95% ↑	91% ↑	84%	75% ↓	87%	86%
Use of devices other than a computer to go online	69%	80% ↑	74% ↑	65%	57% ↓	68%	70%
Only use devices other than a computer to go online	6%	2% ↓	4%	6%	10% ↑	5%	6%

Derived from several questions - IN1/ IN2/ IN3 / IN4 (See questionnaire)
Base: All adults aged 16+ (1890 in 2014).
Arrows show significant differences (95% level) by socio-economic group compared to all adults, and males compared to females.

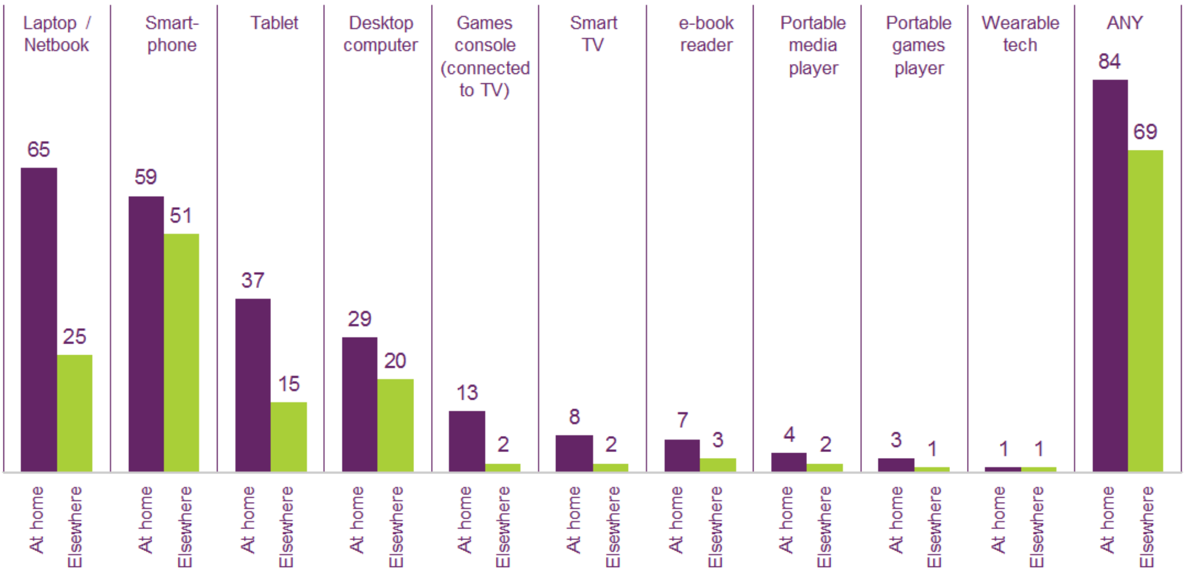
Smartphones are the only devices used to go online both at home and elsewhere by a majority of adults

Adults were asked about their use of specific devices to go online when at home and when elsewhere[28]. It is therefore possible to make a direct comparison of devices used by location. Figure 38 shows that more than eight in ten adults go online at home using any device (84%) while seven in ten go online elsewhere (69%).

- A majority of adults go online at home through a laptop or netbook computer (65%), while a quarter (25%) use the same type of device outside of the home.
- A majority of adults use a smartphone to go online at home (59%) and elsewhere (51%).
- While more than one in three go online at home on a tablet (37%), fewer than half of this proportion do so elsewhere (15%).
- Three in ten (29%) go online at home using a desktop computer, with two in ten using this device to go online outside of the home (20%).

[28] More specifically respondents were asked – ‘Do you ever use any of these devices to go online when you are not at home, this could be when you are at work, at a friend’s house, in a library, when travelling somewhere or when out and about. Please think of any devices you may use to go online anywhere outside the home.’

Figure 38: Devices used to go online: at home versus elsewhere



Derived from several questions - IN1/ IN2/ IN3 / IN4 (See questionnaire)
Base: All adults aged 16+ (1890 in 2014).

Figure 39 summarises the various measures of online access and use by device and location in 2014.

Figure 39: Key measures of internet access and use

	As a % of all adults
Home internet access through a computer	82%
Go online at home through a computer	77%
Go online at home through an alternative device to a computer	68%
Go online at home through a computer or an alternative device	84%
Go online outside the home	69%
Go online at all (on any device in any location)	86%

Derived from several questions - IN1/ IN2/ IN3 / IN4 (See questionnaire)
Base: All adults aged 16+ (1890 in 2014).

Volume of internet use

There has been an increase since 2013 in the estimated number of hours spent online per week. Younger adults, ABs and men continue to record the highest weekly internet use.

Adults using the internet at home or elsewhere were asked to estimate how many hours in a typical week they use the internet in each of three locations: 1) at home, 2) at the workplace or place of education, and 3) anywhere else. Figure 40 compares the average among all internet users by year. Because they are self-reported it is likely that a degree of under- and over-reporting will be present, thus should be taken as indicative only.

The average weekly hours spent online has increased in total since 2013 to more than 20 hours (20.5 vs. 16.9 hours). Increases for all three locations have driven this - at home (12.6 from 11.2 hours), at the workplace or place of education (5.5 from 4 hours) and anywhere else (2.3 from. 1.7 hours).

Although not shown in the chart, there are a number of differences by demographic group, in terms of volume of internet use:

- Younger internet users have a higher weekly volume of use, compared to all internet users (27.6 hours for 16-24s and 23.8 hours for 25-34s). Those aged 16-24s volume of use is higher than average at home (17.9 vs. 12.6 hours), whereas for 25-34s it is higher in the workplace or place of education (6.7 vs. 5.5 hours). Both age group show higher than average use anywhere else (4 and 3.2 hours respectively)

- Internet users aged 35-44 have more hours attributable to the workplace or place of education than average (7.7 vs. 5.5 hours).

- Those aged 45-54 show lower use outside of the home or place of work/ study (1.6 vs. 2.3 hours).

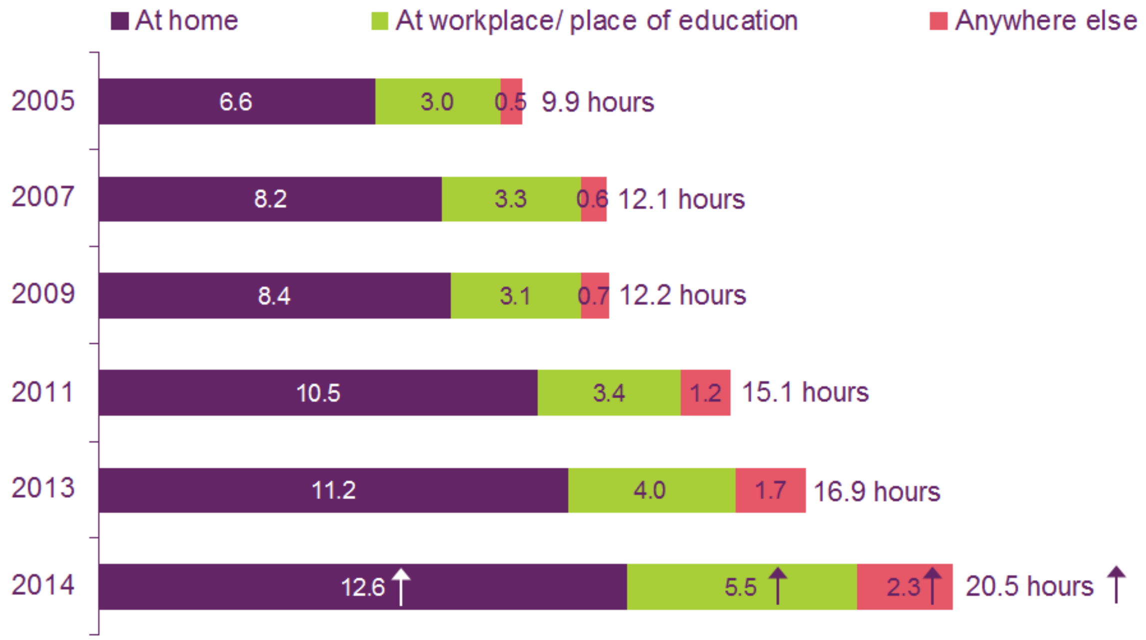
- Those aged 55+ have a lower weekly volume of use compared to all internet users (15.4 hours for 55-64, 9.7 hours for 65-74 and 7.4 hours for those aged 75+). This is the case across all three locations.

- Users in the AB socio-economic group have a higher average than all internet users (24.6 hours), with more hours spent online in the workplace or place of education (9.1 hours). Adult users in C1 socio-economic group have a similar overall average, but use is lower at home (11.5 vs. 12.6 hours) and higher in the workplace/ place of education (6.6 vs. 5.5 hours).

- C2 and DE socio-economic groups have a lower volume of use compared to all users (17.7 for C2 and 17.9 for DE), due to lower use in the workplace/ place of education (3 hours for C2 and 1.8 for DE vs. 5.5 hours for all adults). The latter socio-economic group have a higher weekly volume of use at home (14 vs. 12.6 hours)

- Men (23.3 hours) have a higher estimated weekly volume of use than women (17.8 hours). Their average is higher in all three locations - at home (13.6 vs. 11.7 hours), in the workplace/ place of education (7.0 vs. 4.1 hours) and elsewhere (2.7 vs. 2.0 hours).

Figure 40: Volume of internet use per week: 2005-14



IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
Base: All adults aged 16+ who go online at home or elsewhere (1609 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

Range of websites visited

Internet users estimate that they visit an average of 15 different websites in a typical week.

Internet users were asked to estimate how many different websites they visit in a typical week (for any purpose, and in any location). Figure 41 compares the estimated number of different websites visited by all users in 2013 and 2014, and by age, socio-economic group, and gender in 2014[29].

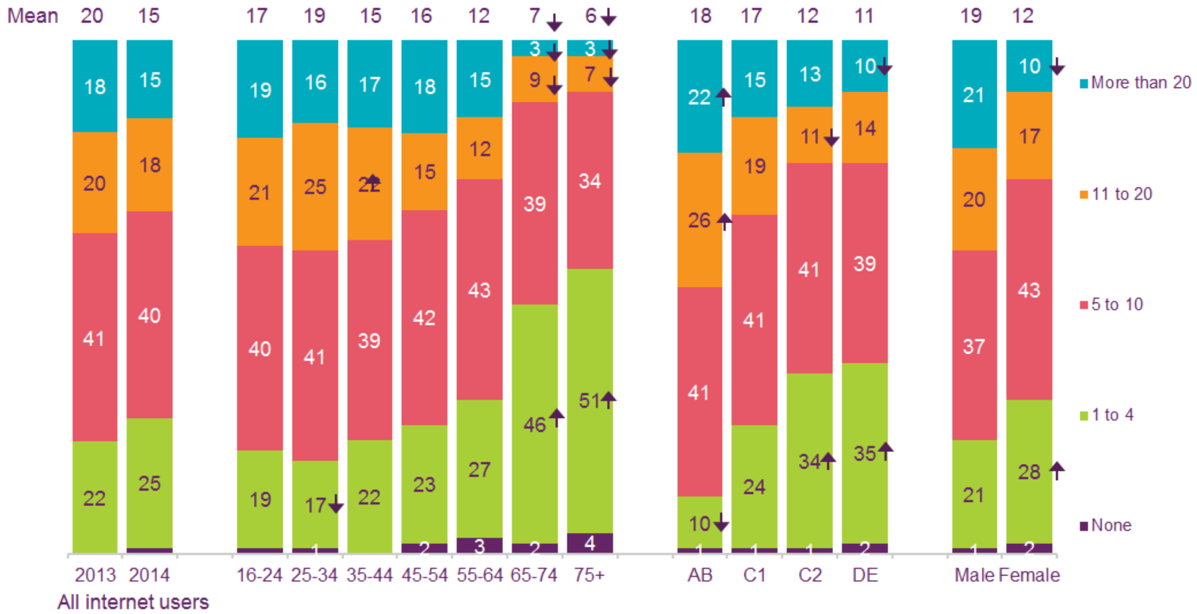
On average, 15 different websites are visited in a typical week across all users, and this is unchanged since 2013. Users aged 65 and over visit a lower average number of different websites (7 for 65-74s and 6 for 75+), as do DE users (11). Men (19) visit more than women (12), while ABs visit more than other socio-economic groups (18).

A quarter (25%) estimate that they visit fewer than five different websites in a typical week, and this is less likely among 25-34s (17%) and more likely among users aged 65+ (46% for 65-74s and 51% for 75+). Users in C2 and DE socio-economic groups are also more likely to visit fewer than five different websites in a typical week (34% for C2 and 35% for DE), while those in AB socio-economic groups are less likely (10% vs. 25%). Women (28%) are more likely than men (21%) to say they visit fewer than five different websites.

Around one in seven users (15%) estimate that they visit more than 20 different websites in a typical week, and this is more likely among AB users (22%). Men (21%) are more likely than women (10%) to visit more than 20 different websites in a typical week.

[29] Because these estimates are self-reported it is likely that a degree of under- and over-reporting will be present, and the estimates shown should be taken as indicative only. Responses shown reflect those that expressed an opinion

Figure 41: Number of different websites visited in a typical week, by demographic group



IN19 - How many different websites would you say you visit in a typical week?
Base: All adults aged 16+ who go online at home or elsewhere (1445 in 2014, 352 AB, 4487 C1, 290 C2, 355 DE, 719 male, 726 female). Bases exclude Don't Know responses
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

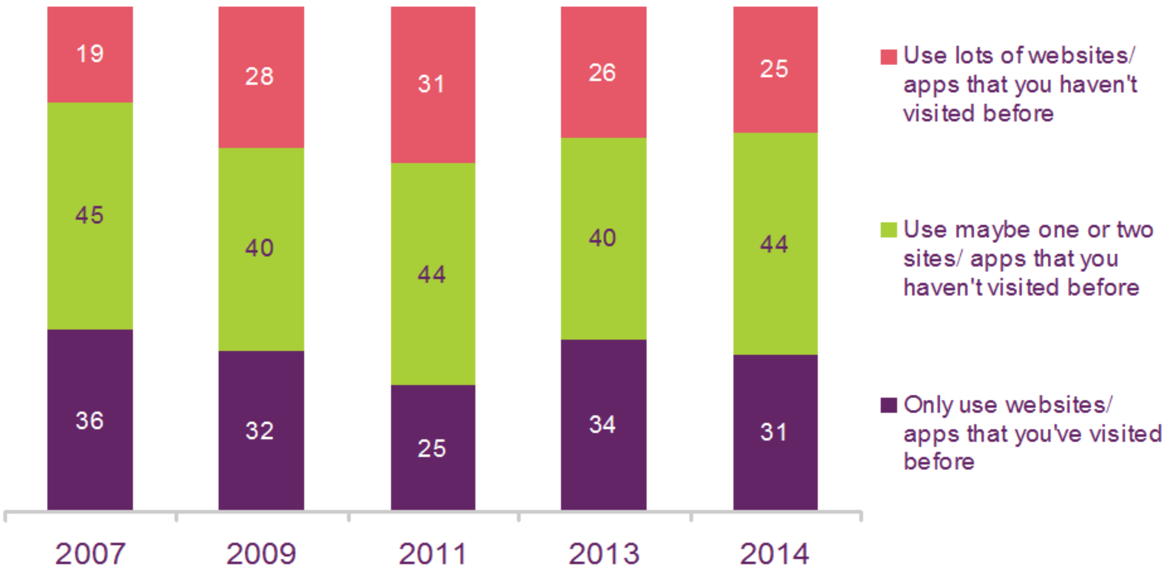
One in four internet users say in most weeks they use lots of websites or apps they haven't used before.

As well as the volume of websites, it is important to understand the extent to which people are willing to explore online, as a context for many of their attitudes and behaviours. In order to have a proxy for this willingness to move beyond what is familiar online, we ask whether or not they tend to use websites that are new to them (in most weeks when they use the internet)[30].

A quarter (25%) of internet users cite using lots of websites or apps that they haven't visited before. More than four in ten (44%) say they use 'maybe one or two' sites or apps that they haven't visited before, while close to a third (31%) say that they tend to use only websites or apps that they have used before. None of these figures have changed to a statistically significant level since 2013.

[30] Responses shown in the chart reflect those that expressed an opinion.

Figure 42: Use of websites or apps not visited before: 2007-14

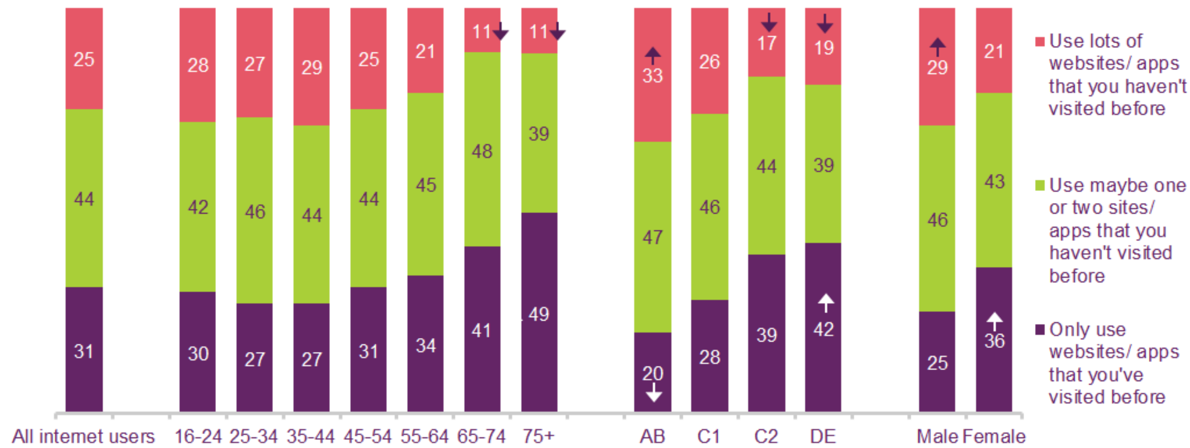


IN14 – In most weeks when you go online using any type of computer, mobile phone, games console or media player would you say that you…
Base: All adults aged 16+ who go online at home or elsewhere (1570 in 2014). Excludes Don't Know responses

As shown in **Figure** 43 internet users aged 65-74 and 75+ (both 11%) are less likely than average (25%) to say that they use lots of websites or apps they haven't visited before. As a consequence the proportion of adults in each of these age groups using only websites or apps they have visited before are higher (41% for 65-74s and 49% for 75+ vs. 31% of all internet users).

Compared to all users, those in C2 and DE socio-economic groups are more likely to say they only use websites or apps they have visited before (39% for C2s and 42% for DEs), while ABs (33%) and men (29%) are more likely to say they use lots of websites or apps they haven't visited before.

Figure 43: Use of websites or apps not visited before, by demographic group



IN14: In most weeks when you go online using any type of computer, mobile phone, games console or media player would you say that you…
Base: All adults aged 16+ who go online at home or elsewhere (1570 in 2014, varies by demographic)
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Online activities undertaken regularly (at least once a week)

Communication and general surfing/ browsing are the types of activity most likely to be undertaken regularly.

Another element of understanding online use is to measure, over time, which activities people are undertaking. In 2014, internet users were prompted with 32 different internet activities and were asked to say how often, if at all, they did each of them[31].

In reporting these online activities, we focus initially on those undertaken at least weekly (as distinct from quarterly or less often), in order to draw out any differentiation in activities undertaken habitually/regularly. Later on, in Section 5 of the report we look in more detail at individual online activities by frequency of use; including quarterly consumption of some of the activities which are unlikely to be carried out on a weekly basis (e.g. public/civic activities, in Section 5.9).

For this particular analysis, the individual activities have been grouped into ten types of use, to enable broader comparison[32] and these are shown in Figure 44.

Figure 44: Categories of internet activity

Category	Individual activities included in category
Communication	• Sending or receiving emails • Using Instant Messaging services • Making or receiving telephone or video calls using services like Skype or FaceTime • Contributed comments to a website or blog
Transactions	• Buying things online • Selling things online • Banking and paying bills online • Downloading software
Work/ studies information	• Finding information online for work/ job or for studies • Doing an online course to achieve a qualification • Looking at job opportunities
Social media	• Looking at social media sites or apps • Upload or share videos or photos online • Sharing links to websites or online articles, perhaps on Twitter, Facebook, Reddit or LinkedIn
Entertainment	• Playing games online • Listening to radio stations online • Listen to or download music online • Watching online or downloading short video clips such as music videos or comedy clips • Watch online or download TV programmes or films (from broadcasters' websites) • Looking at adult-only websites
News	• Looking at news websites or apps
Leisure information	• Finding information for leisure time such as cinema/ live music
Public/ civic	• Finding information online about public services provided by local or national government • Completing government processes online such as registering for tax credits, renewing a driving licence, car tax or passport, completing a tax return • Looking at political or campaign or issues websites • Signing an online petition • Contacting a local councillor or your MP online • Looking at websites for news about, or events in your local area/ the local community
Health	• Finding information about health-related issues
General surfing/ browsing	• General surfing/ browsing the internet

IN15/16:…please tell me from this list the types of things you currently do online, and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1609 in 2014)

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[31] These activities in no way represent an exhaustive list of all the potential activities that can be undertaken online, but were chosen as representing the majority of activities for most people.

[32] Thirty of the thirty two individual uses are shown. For the purpose of this analysis, the individual activities of 'filling in a form or application online' and setting up or maintaining a website or blog have not been included.

Younger internet users have a broader weekly internet use

Figure 45 shows the proportion of internet users who carry out each of the ten categories of internet use at least weekly, at an overall level and by age. Generally, those under the age of 35 have a higher propensity than the average internet user to undertake a number of online activities at least weekly:

- Internet users aged 16-24 are more likely than average to do six of them: communication (94% vs. 88%), general surfing / browsing (93% vs. 86%), social media (90% vs. 66%), entertainment (78% vs. 59%), work/ studies information (66% vs. 50%) and leisure information (45% vs. 30%).

- 25-34s are more likely to use the internet at least weekly for seven of the ten types of use: communication (95% vs. 88%), general surfing/ browsing (93% vs. 86%), social media (84% vs. 66%), entertainment (74% vs. 59%), transactions (65% vs. 54%), work/ studies information (59% vs. 50%) and health (22% vs. 16%).

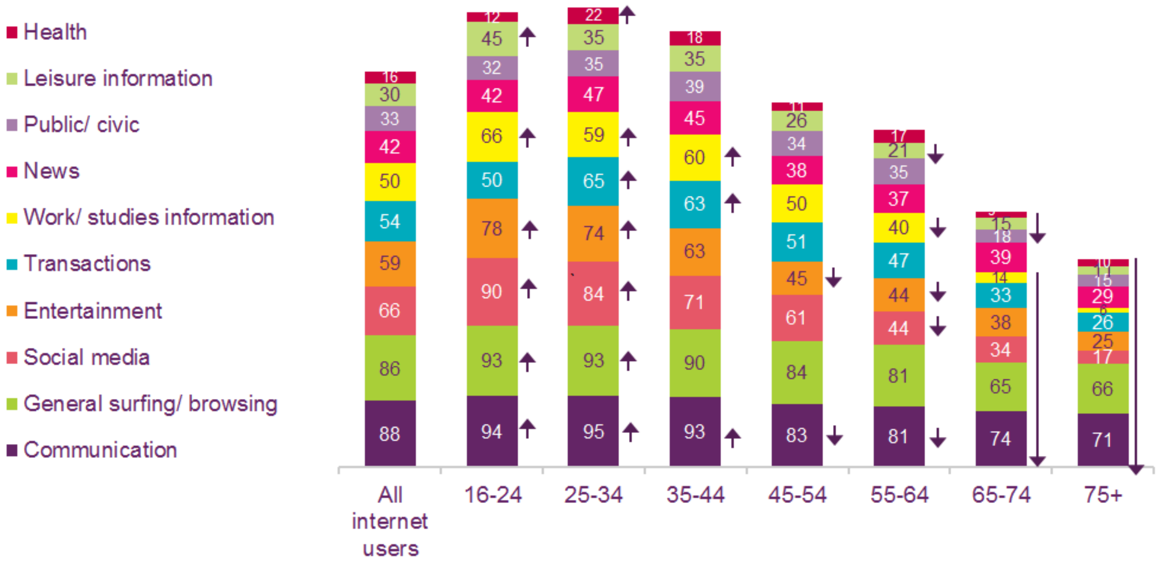
- 35-44s are more likely to undertake three categories: communication (93% vs. 88%), transactions (63% vs. 54%) and work/ studies information (60% vs. 50%).

- 45-54s are less likely to use the internet at least weekly for two of the ten types of activity: communication (83% vs. 88%) and entertainment (45% vs. 59%).

- 55-64s are lower for five of the activities: communication (81% vs. 88%), social media (44% vs. 66%), entertainment (44% vs. 59%), work or studies information (40% vs. 50%) and for leisure information (21% vs. 30%).

- Internet users aged 65-74 are less likely to undertake nine out of the ten types of activity at least weekly and those aged 75 are less likely to undertake all ten.

Figure 45: Categories of weekly internet activity, by age



IN15/16 – please tell me from this list the types of things you currently do online, and how often you do each?
Base: All adults who go online at home or elsewhere (1609 in 2014, 240 aged 16-24, 277 aged 25-34, 319 aged 35-44, 265 aged 45-54, 228 aged 55-64, 150 aged 65-74, 130 aged 75+).
Arrows show significant differences (95% level) for age compared to all internet users

Those in the AB socio-economic group have a broader weekly internet use

Where differences exist across the socio-economic groups, it tends to be the case that ABs are more likely than all internet users to do an activity weekly, and DEs are less likely.

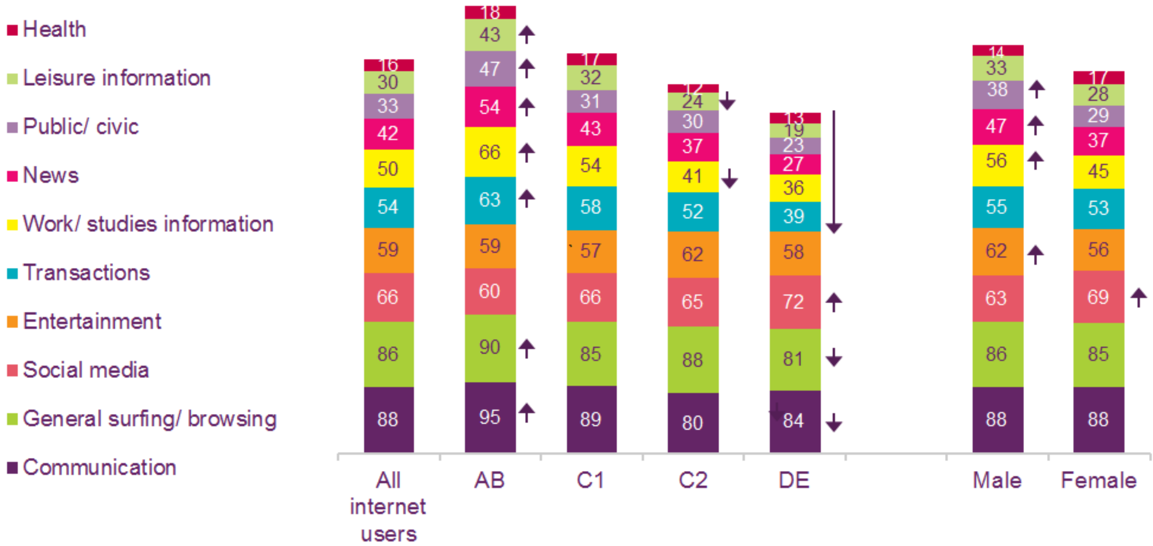
Seven of the ten types of activity have higher figures among ABs: communication (95% vs. 88%), general surfing/ browsing (90% vs. 86%), transactions (63% vs. 54%), work/ studies information (66% vs. 50%), news (54% vs. 42%), public/ civic (47% vs. 33%) and leisure information (43% vs. 30%).

In contrast to the above, DEs are less likely to use the internet at least weekly for seven of the ten types of activity. The most sizeable differences are for work/ studies information (36% vs. 50% for all) and for news (27% vs. 42%).There is just one type activity that DEs are more likely to go online for at least weekly: social media (72% vs. 66%).

Those in the C2 socio-economic group are also less likely to go online at least weekly for three of the ten types of activity: communication (80% vs. 88%), work/ studies information (41% vs. 50%) and leisure information (24% vs. 30%).

There are also differences by gender. Men are more likely than women to use the internet at least weekly for work/ studies information (56% vs. 45%), news (47% vs. 37%) and public/ civic activities (38% vs. 29%). Women are more likely than men to use the internet at least weekly for social media (69% vs. 63%).

Figure 46: Categories of weekly internet activities, by socio-economic group and gender



	All internet users	AB	C1	C2	DE	Male	Female
Health	16	18	17	12	13	14	17
Leisure information	30	43	32	24	19	33	28
Public/ civic	33	47	31	30	23	38	29
News	42	54	43	37	27	47	37
Work/ studies information	50	66	54	41	36	56	45
Transactions	54	63	58	52	39	55	53
Entertainment	59	59	57	62	58	62	56
Social media	66	60	66	65	72	63	69
General surfing/ browsing	86	90	85	88	81	86	85
Communication	88	95	89	80	84	88	88

IN15/16 – please tell me from this list the types of things you currently do online, and how often you do each?
Base: All adults who go online at home or elsewhere (1609 in 2014, 404 AB, 497 C1, 314 C2, 394 DE, 791 male, 818 female)
Arrows show significant differences (95% level) for socio-economic group compared to all internet users, and males compared to females.

4.4 Media device take-up, use and affinity

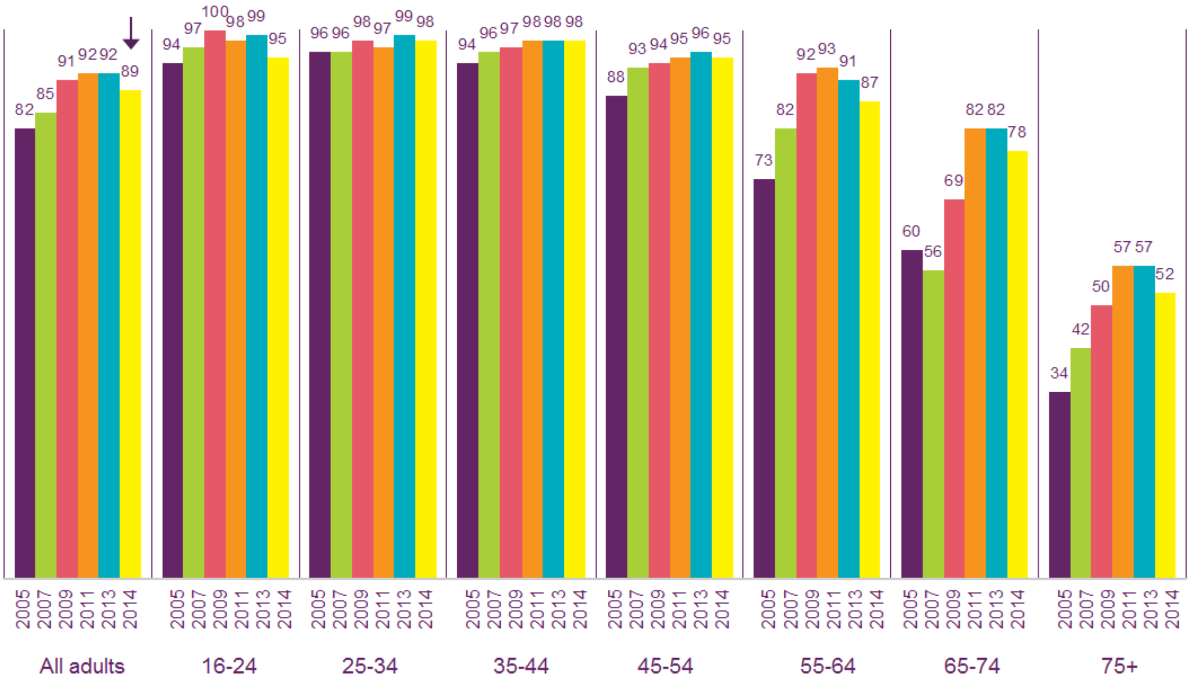
Mobile phone ownership

Mobile phone ownership has remained relatively stable since 2013

As shown in Figure 47, nine in ten adults (89%) use a mobile phone, a slight decrease from 2013 (92%)[33].

In 2014, those aged under 45 are more likely than all adults to use a mobile phone (95% for 16-24s, 98% for 25-34s, and 98% for 35-44s). Those aged 65 and over are less likely (78% for 65-74 and 52% for 75+ vs. 89%).

Figure 47: Take-up of mobile phone, by age: 2005-2014

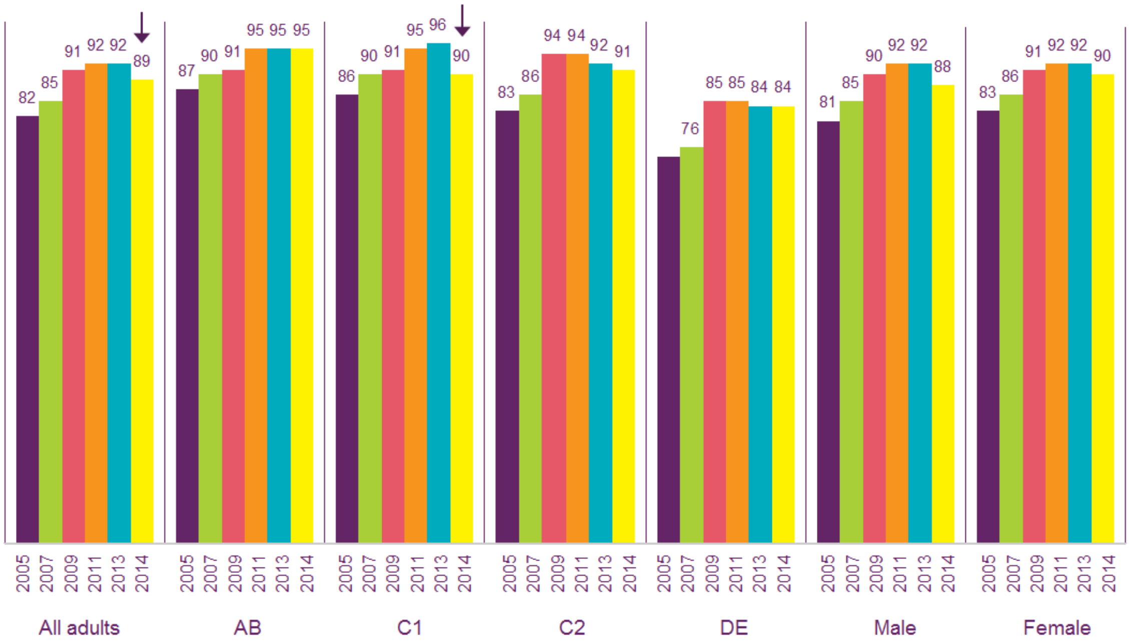


M1 – Do you personally use a mobile phone?
Base: All adults aged 16+ (1890 in 2014, 254 aged 16-24, 288 aged 25-34, 327 aged 35-44, 284 aged 45-54, 276 aged 55-64, 221 aged 65-74, 240 aged 75+).
Arrows show significant changes (99% level) between 2013 and 2014

As shown in Figure 48 the small decrease observed overall is driven by adults in C1 households (90% use a mobile phone in 2014 vs. 96% in 2013). Compared to all adults (89%), those in AB households (95%) are more likely to use a mobile phone, while use is lower among adults in DE households (84%). Use of a mobile phone does not vary by gender.

[33] This is only just significant at a 99% level, and is not necessarily a true sign of a decline in mobile phone ownership. Official all-UK Ofcom take-up figures based on a larger survey can be found in the annual CMR (Communications Market Report) published in August each year e.g. http://www.ofcom.org.uk/cmr14/

Figure 48: Take-up of mobile phone, by socio-economic group and gender: 2005-14



M1 - Do you personally use a mobile phone?
Base: All adults aged 16+ (1890 in 2014, 430 AB, 551 C1, 376 C2, 533 DE, 927 male, 963 female).
Arrows show significant changes (99% level) between 2013 and 2014

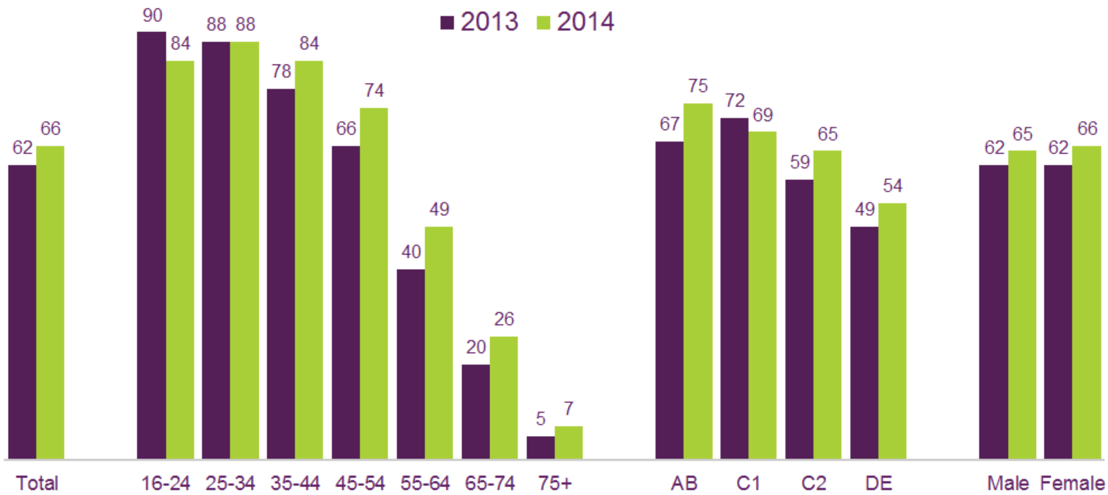
Two thirds of adults use a smartphone, the same as in 2013.

As shown in Figure 49, two thirds of adults (66%) use a smartphone and this is unchanged since 2013 (62%).

Those under the age of 55 are more likely than all adults (66%) to use a smartphone, ranging from 74% for 45-54s to 88% of 25-34s. Around half of 55-64s use a smartphone (49%), compared to 26% of 65-74 year olds and 7% of 75+ year olds.

Smartphone use is split evenly by gender, but three quarters (75%) of ABs use a smartphone, compared to 54% of DEs.

Figure 49: Take-up of smartphones, by demographic group: 2013 vs. 2014



M2 - Is this a smartphone?
Base: All adults aged 16+ (1890 in 2014, 254 aged 16-24, 288 aged 25-34, 327 aged 35-44, 284 aged 45-54, 276 aged 55-64, 221 aged 65-74, 240 aged 75+).

Activities undertaken on a mobile phone

A majority of mobile phone users now use their phone for content creation and content searching activities

Similar to online use, we also capture mobile phone activities undertaken. Adults who use a mobile phone were prompted with 22 different internet activities and were asked to say which they ever did, and how often they did each[34].

Similar to the online activities reported on in this section, we focus initially on mobile phone activities undertaken at least weekly (as opposed to quarterly or less often), in order to draw out any differentiation in activities undertaken habitually/regularly.

Figure 50: Categories of mobile phone activity

Category	Individual activities included in category
Communication	• Make or receive calls • Send or receive text messages • Send or receive photo messages • Send or receive video clips • Visit social media sites or apps like Facebook, Twitter, LinkedIn, Instagram, Tumblr or Pinterest • Put photos or videos on sites like YouTube, Facebook or Instagram for others to see • Send or receive Twitter updates using your phone • Send or receive email • Make or receive telephone or video calls over the internet using services like Skype or FaceTime • Use Instant Messaging such as Apple iMessage, WhatsApp, Facebook Chat, Blackberry Messenger/ BBM
Content - searching	• Visit websites using your phone • Use features such as Maps or satellite navigation to get to where you want to go/ plot a route to your destination • Download apps/ applications (including games)
Content - creating	• Take photos • Take videos
Audio content	• Listen to music
Watching online video	• Visit sites or apps like YouTube or Vine to look at videos or clips posted by other people • Watch TV programmes
Transactions	• Check your bank balance • Buy things from websites or apps using your phone
Playing games	• Play games that are loaded on the phone • Play games over the internet using your phone

M7 - Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1670 in 2014)

[34] As with the earlier online activities, these do not represent an exhaustive list of all the potential activities that can be undertaken on a mobile phone, but were chosen as representing the majority of activities for most people.

Figure 51 shows the proportion of mobile users who carry out each of the seven categories of mobile phone use, at an overall level and by age.

Among all mobile phone users, three of the seven types of use are undertaken at least weekly by a majority of users: communication (96%), content-searching (58%), and content-creating (54%). Differences observed by demographic group are as follows:

- Those aged 16-24 and 25-34 are more likely than all mobile users to do seven categories at least once a week. For the categories mentioned above the figures for each respective age group are as follows: communication (100% and 100%), content searching (78% and 79%), and content creating (79% and 75%).

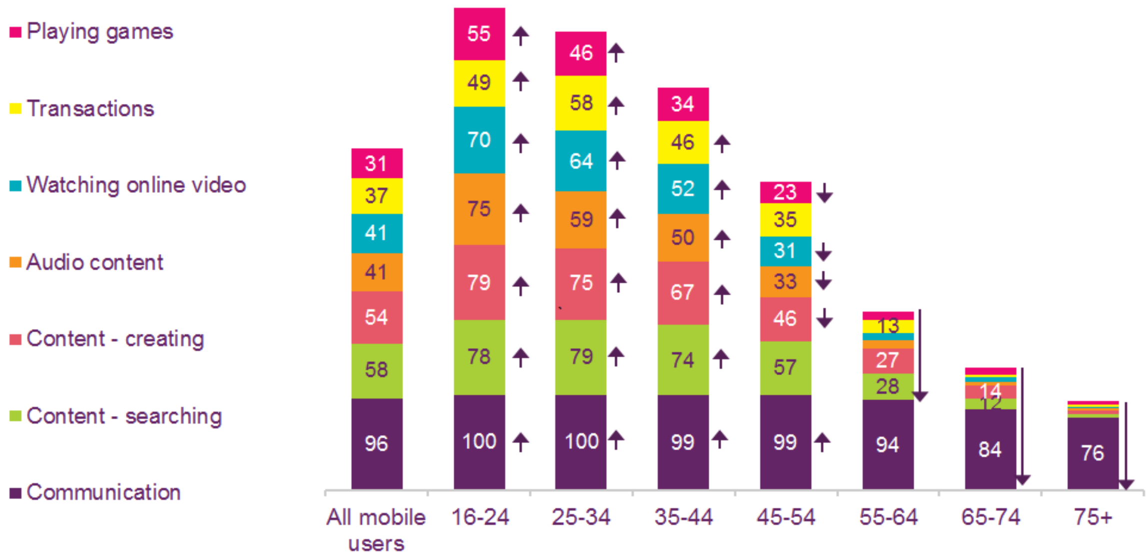
- Those aged 35-44 are more likely to do six out of the seven types of use weekly, only being as likely as all adults to play games using their phone (34% vs. 31% for all mobile users).

- Those aged 45-54s are more likely use their phone for communication (99% vs. 96%). they are less likely to use their phone at least weekly for four types of use: content creating (46% vs. 54%), audio content (33% vs. 41%), watching online video (31% vs. 41%) and playing games (23% vs. 31%).

- In contrast, mobile phone users aged 55-64 are less likely than all users to say they use their phone at least weekly for six of the seven types of use, being as likely to use their phone for communication (94% vs. 96%).

- Users aged 64-75 and 75+ are much less likely to use their mobile phones for all seven types of activity, including for communication (84% and 76% vs. 96%).

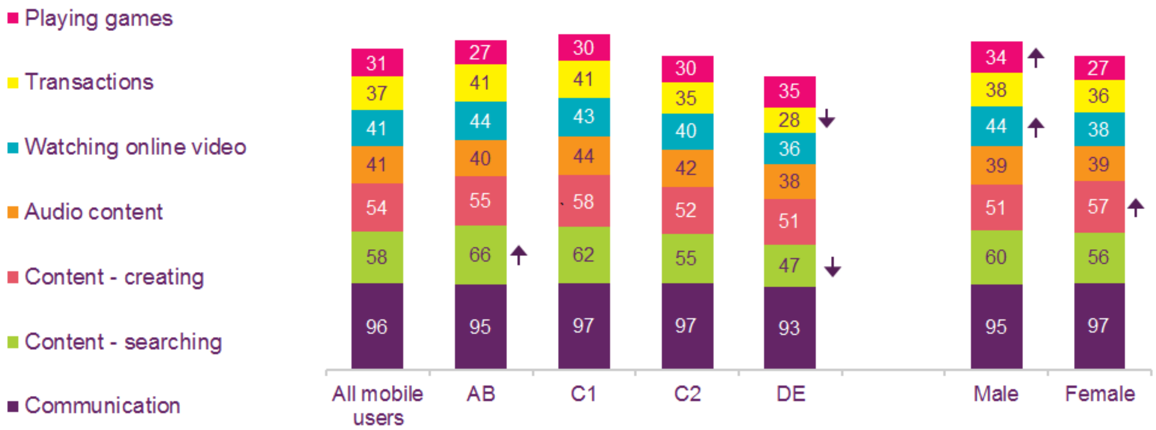
Figure 51: Categories of mobile activity partake in at least once a week, by age



M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1670 in 2014, 244 aged 16-24, 281 aged 25-34, 321 aged 35-44, 270 aged 45-54, 243 aged 55-64, 167 aged 65-74, 144 aged 75+).
Arrows show significant differences (95% level) for age compared to all internet users.

As shown in Figure 52 there is less variation in the types of use undertaken weekly by users in the different socio-economic groups compared to all mobile users. Mobile users in AB households are more likely to use their phone for searching for content (66% vs. 58%), while DE users are less likely to use their mobiles for this purpose (47% vs. 58%) and also for transactions (28% vs. 37%). Men are more likely than women to use their mobile phone at least weekly for two types of use: watching online video (44% vs. 38%) and for playing games (34% vs. 27%), while women are more likely to use their phone for creating content (57% vs. 51%).

Figure 52: Categories of mobile activity partake in at least once a week, by socio-economic group and gender



M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1670 in 2014, 399 AB, 492 C1, 337 C2, 442 DE, 808 male, 862 female)
Arrows show significant differences (95% level) for socio-economic group compared to all internet users, and males compared to females.

Use of apps

Apps are used by most smartphone and tablet users

Adults who go online at home or elsewhere using either a smartphone (61% of all adults), a tablet (39% of all adults) or a Smart TV (8% of all adults) were asked whether they used apps on these devices.

As shown in Figure 53 more than nine in ten who go online on a smartphone use apps on this type of device (91%), while a similar proportion of those who go online on a tablet use apps (86%). More than six in ten who go online through a Smart TV use apps on this type of device (63%).

Where it is possible to draw comparisons by subgroup[35], 16-24s (96%) are more likely than all adults (91%) who go online on a smartphone to say they use apps on a smartphone. Those aged 55 and over (80%) are less likely to. There are no differences in use of apps on either a smartphone or a tablet by socio-economic group or by gender.

[35] This is not possible among those who go online through a smart TV due to the comparatively low base size

Figure 53: Use of apps on a smartphone, tablet or smart TV

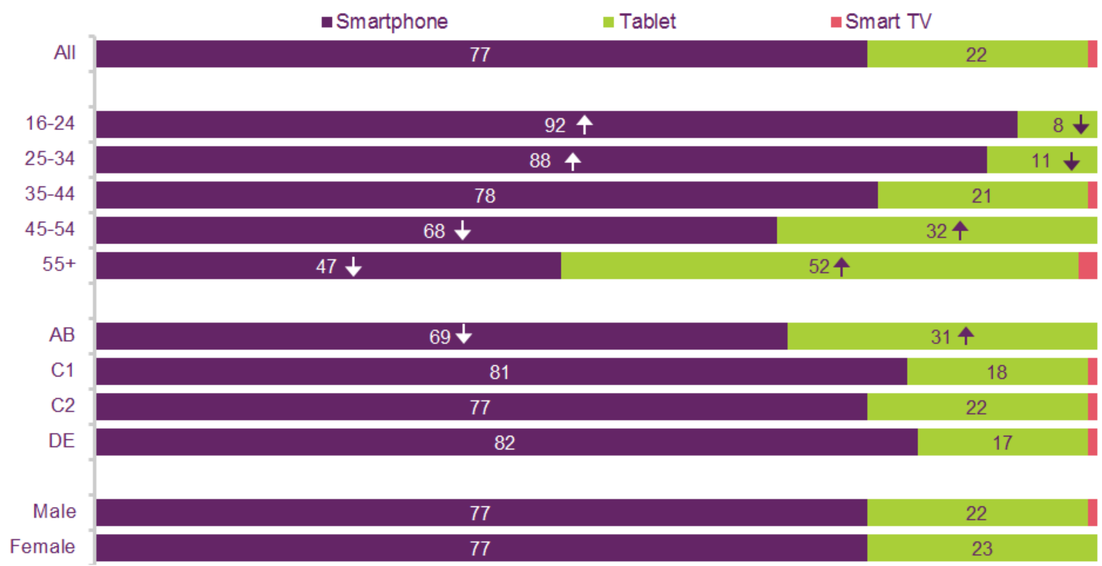
IN20A-C: Do you use apps on the smartphone/ tablet computer/ smart TV?
Base: All who go online at home or elsewhere through a smartphone (1063)/ all who go online through a tablet computer (711)/ all who go online through a smart TV (141)

Adults using apps on a smartphone, tablet or smart TV were then asked which device they considered their main device for using apps i.e. the one they would use most often when using apps. The results are shown in Figure 54.

Nearly eight in ten say that their main device for apps is their smartphone (77%) with around one in five citing a tablet (22%). There are some differences by subgroups, which generally reflect ownership patterns: 16-24s (92%) and 25-34s (88%) are more likely to cite a smartphone, while those aged 45 and over are more likely to say a tablet (32% for 45-54s and 52% for 55+).

While app users in AB households are more likely to say their main device for apps is a smartphone (69%) as opposed to a tablet (31%), the former is lower than the average (77%), while the latter is higher (22% for all). There are no differences by gender.

Figure 54: Main device for apps, by demographic group



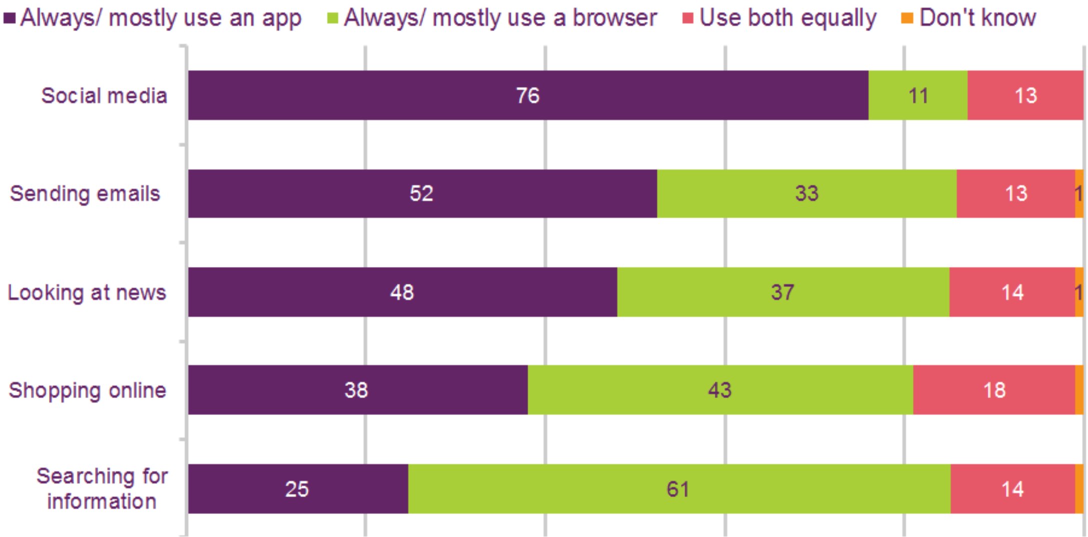
IN21 Which one of these is your main device for using apps - so the one you would use most often…?
Base: Those who go online through a smartphone, tablet or smart TV and who use apps on any of these devices (1080 aged 16+, varies by demographic)
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

There is a preference among app users for accessing content through apps rather than browsers – unless they are searching for information

App users were asked to think about their main device for using apps and to indicate the extent to which they access the content through an app or a browser, for specific activities[36].

Figure 55 shows that there are two activities for which a majority of app users mostly use an app rather than a browser: social media (76%), and sending emails (52%). There is only one activity that a majority of app users prefer to use a browser for: searching for information (61%). While a minority of app users prefer to use an app when looking at news content (48%), they are still more likely to opt to use an app as opposed to a browser (37%). There is less of a consensus regarding shopping online, as 43% of app users always or mostly use a browser compared to 38% opting to always or mostly use an app.

Figure 55: Apps versus browsers



IN22: 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?
Base: Adults aged 16+ who use apps for each specific activity (varies by activity)

Device used most often for specific online activities

Smartphones are the preferred device to use for social media

Adults who cited going online at home or elsewhere, and had ever undertaken particular activities, were asked to say which one device they mostly used to undertake them, and the results are shown in Figure 56.

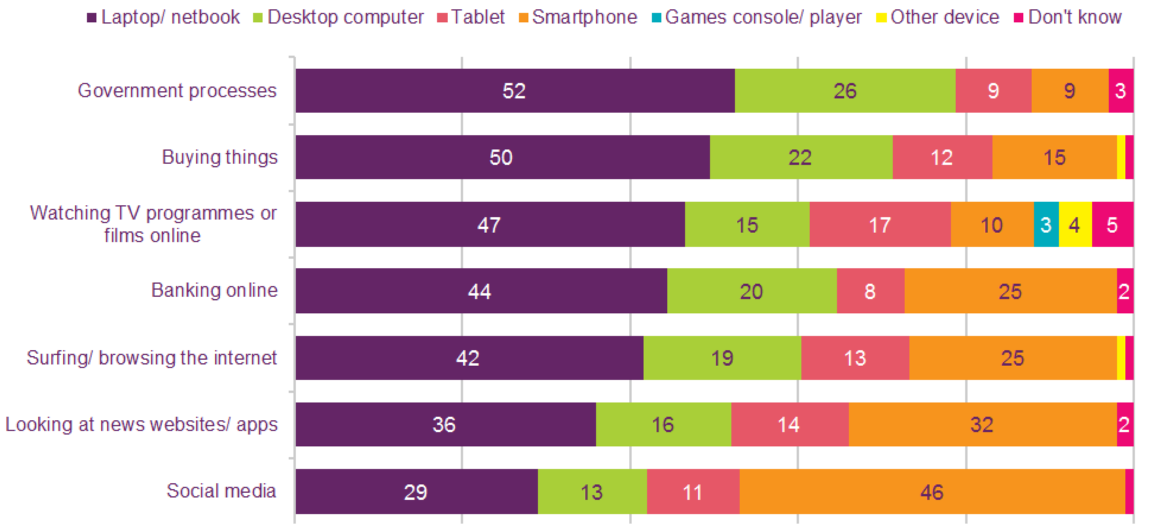
A majority of internet users who have ever gone online to complete government processes say they mostly use a laptop or netbook to complete this activity (52%). One in four (26%) mainly use a desktop computer, with around one in ten opting to use a tablet (9%) or smartphone (9%).

For five of the seven online activities shown (the first five shown in Figure 56) there is a clear preference for going online using a laptop or netbook. An equal proportion of internet users say they tend to use a laptop/ netbook (36%) or smartphone (32%) for looking at news

[36] They were also given the option to say that they never undertook each activity and for the purpose of this analysis these respondents have been excluded from the data shown in the chart.

websites/ apps, while a smartphone is the most used device for social media (46%). It is also worth noting that a quarter of those who bank online (25%) and surf/ browse online (25%) prefer to do so on a smartphone.

Figure 56: Device used most often for specific online activities



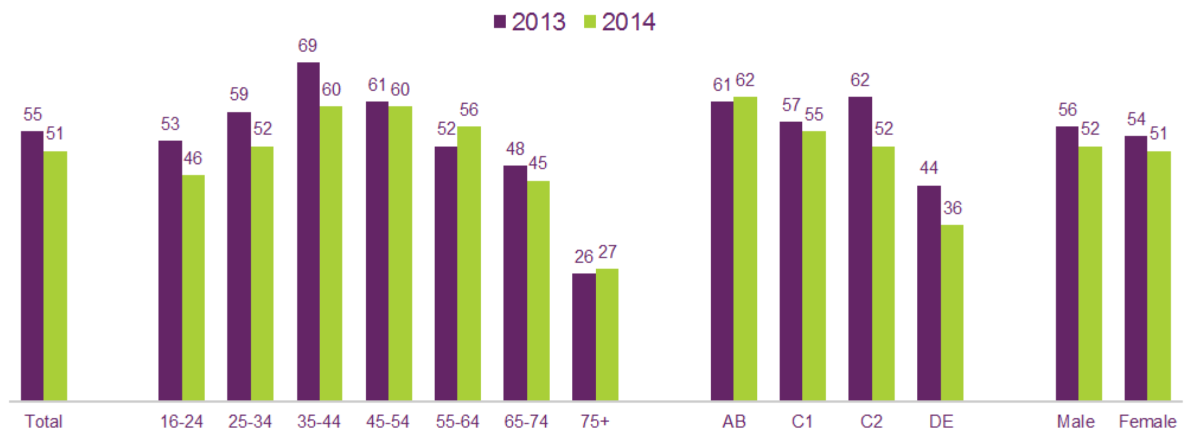
IN18A-G: Which one of these devices do you use most for (ACTIVITY)?
Base: All adults aged 16+ who go online at home or elsewhere that ever undertake each activity (variable base)

DVR Ownership

Ownership of a DVR such as Sky+, V+, Freeview+, etc. has remained at similar levels to 2013 - around half of adults (51%), and there has been no significant change since 2013 by any of the demographics shown in Figure 57.

Adults aged 35-44 (60%) and 45-54 (60%) are more likely to have a DVR at home compared to all adults, while those aged 75 and over are more than half as less likely (27%).Ownership is higher in AB households (62%), and lower among DEs (36%).

Figure 57: Ownership of a DVR, by demographic group: 2013 vs. 2014



T2 – Do you have a DVR system such as Sky Plus, V Plus, Freeview Plus or any other similar system?
Base: All adults aged 16+ (1890 in 2014, varies by demographic).

Daily media platform/device usage

Younger adults are more likely to use mobiles, computers and games consoles almost every day, while older respondents are more likely to use traditional platforms such as TV, radio and print.

We ask respondents about a range of possible media platforms/devices to find out which, if any, they use almost every day. As shown in Figure 58 there are four devices cited by a majority of adults. TV set (92%), mobile phone (82%), and PC/ laptop computer (61%), radio (55%). A majority (54%) also read books/ magazines or newspapers almost every day. Compared to all adults (92%), daily use of a TV set is less likely among 16-24s (82%) and more likely among 65-74s (97%) and those aged 75+ (99%).

Daily use of a mobile phone is more likely among 16-54s (nine in ten or higher among all age groups) and less likely among those aged 55+ (75% for 55-64s, 54% for 65-74s and 32% for those aged 75+).

Those aged 25-54 are more likely (highest among 35-44s at 72%), and aged 65+ less likely (lowest among 75+ year olds at 24%) to use a PC/laptop.

There are two platforms shown to be less likely among younger adults (16-34s) and more likely for older adults (55+):

- One in three 16-24s (35%) and four in ten 25-34s (42%) say they use a radio almost every day, compared to more than six in ten of all age groups above the age of 55.

- Similarly, around four in ten 16-24s (40%) and 25-34s (42%) read books/ magazines/ newspapers, compared to more than six in ten of all age groups above the age of 55.

Use of a tablet computer is more likely among 35-44s (52%), and less likely among 55-64s (28%), 65-74s (23%) and those aged 75+ (10%). Use of a DVD or Blu-ray player is more likely among 16-24s (27% vs. 19% for all) and less likely among those aged 75+ (12%).

Compared to all adults (15%), more than twice as many 16-24s (33%) use a games console/ player almost every day. Adults aged 25-34 are also more likely to use gaming devices (22%) while only six percent of 55-64s and one percent of 65-74s and 75+ use gaming devices.

16-24s are also more likely to use an MP3 player almost every day (23% vs. 12%), with 65-74s (5%) and 75+ (2%) less likely to use this type of device.

Figure 58: Regular media usage, by age

	All adults	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1890**	**254**	**288**	**327**	**284**	**276**	**221**	**240**
TV set	92%	82% ↓	93%	92%	95%	92%	97% ↑	99% ↑
Mobile phone	82%	94% ↑	96% ↑	95% ↑	91% ↑	75% ↓	54% ↓	32% ↓
PC/ laptop computer	61%	56%	70% ↑	72% ↑	70% ↑	63%	46% ↓	24% ↓
Radio	55%	35% ↓	42% ↓	57%	61%	64% ↑	64% ↑	69% ↑
Books/ magazines/ newspapers	54%	40% ↓	42% ↓	51%	50%	67% ↑	69% ↑	67% ↑
Tablet	37%	41%	40%	52% ↑	42%	28% ↓	23% ↓	10% ↓
DVD/ Blu ray player	19%	27% ↑	19%	21%	21%	17%	16%	12% ↓
Games console/ player	15%	33% ↑	22% ↑	17%	14%	6% ↓	1% ↓	1% ↓
MP3 player	12%	23% ↑	13%	16%	10%	11%	5% ↓	2% ↓

A1 – Which of the following do you use almost every day? (Prompted responses, multi-coded)
Arrows show significant differences (95% level) for age groups compared to all internet users

Adults in DE households are less likely to use most media on a daily basis

As shown in Figure 59, ABs are more likely to cite five of the nine media asked, with tablet (53% vs. 37%) and PC/laptop computer (76% vs. 61%) showing the highest differences compared to all adults.

Adults in C1 households are also more likely to use a PC/ laptop (68% vs. 61%), with C2s (53%) and DEs (44%) less likely. C2s are also less likely to read books/ magazines/ newspapers almost every day (47% vs. 54%), while DEs are less likely to cite five other media (tablet and mobile phone are both 12 percentage points lower than the average).

Women (95%) are more likely than men (90%) to watch a TV set almost every day, while men are more likely to use a PC/ laptop (66% vs. 56%), a DVD/ Blu-ray player (22% vs. 17%), a games console/ player (19% vs. 12%), and an MP3 player (14% vs. 10%).

Figure 59: Regular media usage, by socio-economic group and gender

	All adults	AB	C1	C2	DE	Male	Female
Base	**1890**	**430**	**551**	**376**	**533**	**927**	**963**
TV set	92%	90%	91%	93%	95%	90%	95% ↑
Mobile phone	82%	87% ↑	84%	81%	75% ↓	80%	83%
PC/ laptop computer	61%	76% ↑	68% ↑	53% ↓	44% ↓	66% ↑	56%
Radio	55%	63% ↑	54%	57%	47% ↓	57%	53%
Books/ magazines/ newspapers	54%	65% ↑	55%	47% ↓	46% ↓	51%	56%
Tablet	37%	53% ↑	36%	32%	25% ↓	38%	36%
DVD/ Blu ray player	19%	20%	17%	18%	23%	22% ↑	17%
Games console/ player	15%	12%	15%	14%	19%	19% ↑	12%
MP3 player	12%	16%	15%	9%	8% ↓	14% ↑	10%

A1 – Which of the following do you use almost every day? (Prompted responses, multi-coded)
Base: All adults aged 16+ (1890 in 2014, 430 AB, 551 C1, 376 C2, 533 DE, 927 male, 963 female)
Arrows show significant differences (95% level) for socio-economic group compared to all internet users, and males compared to females.

Most-missed media device

Television sets are the most-missed media device among all adults, but the mobile phone carries much more importance among younger ages.

To understand how much importance people attach to various media, we asked them to say which single media device they would miss the most if it was taken away.

Among adults as a whole, television is the device they would miss the most, by close to four in ten (37%). One in three adults say they would miss a mobile phone the most (32%) and around one in eight adults say they would miss a PC/ laptop the most (13%). Fewer than one in ten adults say they would miss either radio (5%), books/ magazines or newspapers (5%), tablet computer (4%) or a games console or player the most (2%).

As shown in Figure 60, there are a number of differences by demographic group:

- 16-24s (59%) and 25-34s (50%) are more likely than all adults (32%) to say they would miss a mobile phone the most. 16-24s are more than three times as likely to miss a mobile phone as any other activity. This age group is also more likely to miss a games console/ player (7% vs. 2% for all). Both of these age groups are also less likely to miss a TV set (17% and 28% vs. 37%), radio (1% and 2% vs. 5%) and books/ magazines/ newspapers (1% and 2% vs. 5%).

- Adults aged 35-44 are more likely than all adults to say they would miss a mobile phone (40% vs. 32%) and less likely to cite a TV set (25% vs. 37%). In addition, they are more likely to say they would miss a PC/ laptop (18% vs. 13%) or a tablet computer (9% vs. 4%).

- Adults aged 45-54 do not differ from all adults regarding the media device they would miss the most.

- There are three media devices that 55-64s are more likely to say they would miss the most: TV set (48% vs. 37%), radio (9 vs. 5%) and books/ magazines/ newspapers (8% vs. 5%). Adults in this age group are three times less likely to say they would miss their mobile phone the most (11% vs. 32%).

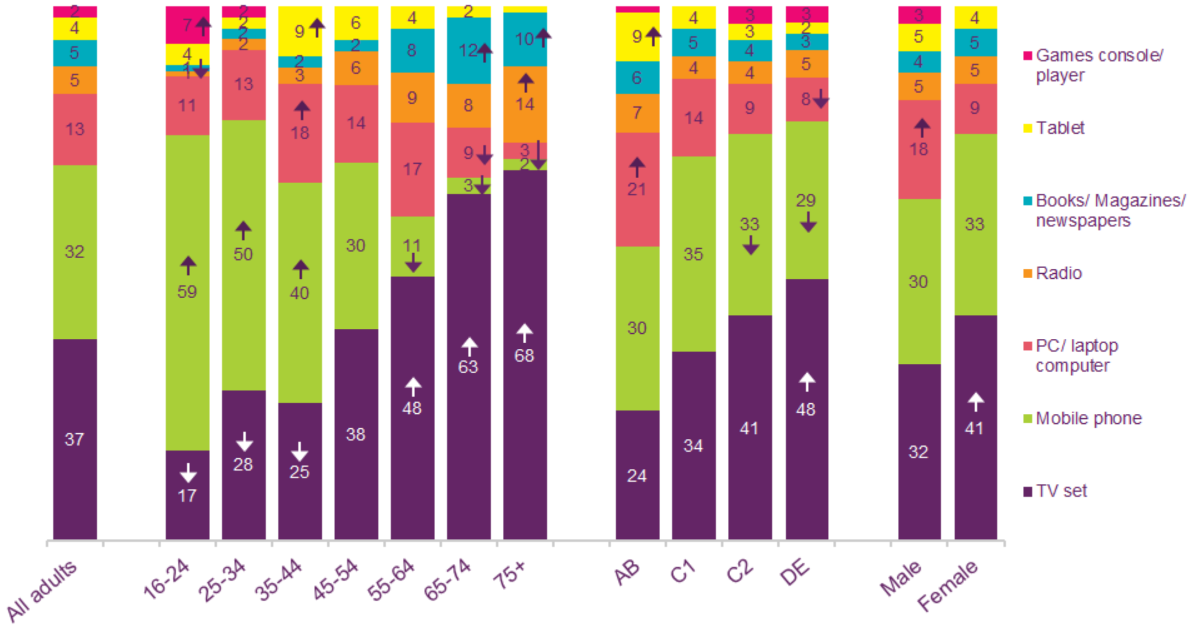
- A majority of 65-74s say they would miss a TV set the most (63% vs. 37%), with one in eight missing books/ magazines/ newspapers the most (12% vs. 5%). Only three percent would miss a mobile phone the most compared to one in three of all adults (32%).

- By contrast, adults aged 75 and over are more likely than adults as a whole to say they would miss a TV set (68% vs. 37%), radio (14% vs. 5%) and books/ magazines/ newspapers (10% vs. 5%). They are less likely to say they would miss a mobile phone (2% vs. 32%), a PC/ laptop (3% vs. 13%) or a tablet computer (1% vs. 4%).

- ABs are less likely than all adults to say they would miss a TV set (24% vs. 37%), and more likely to say they would miss a PC/laptop computer (21% vs. 13%). They are also more likely to say they would miss a tablet (9% vs. 4%). C2s (9%) and DEs (8%) are less likely to miss using a computer, while DEs are more likely to miss a TV set (48%).

- Men are twice as likely as women to say they would miss a computer (18% vs. 9%), and a games console/ player (3% vs. 0%). Women (41%) are more likely than men (32%) to say they would miss a TV set.

Figure 60: Most-missed media device, by demographic group



A2: Which one of these things you use almost every day would you miss the most if it got taken away?
Base: All adults aged 16+ (1890 in 2014, varies by demographic) NB Showing responses by >1% of all adults
Arrows show significant differences (95% level) for age compared to all internet users

Section 5

Digital media activities

5.1 Section overview

Expanding upon the reporting of regular/weekly use covered in Section 4, this section explores in more detail the various activities conducted online across any device, and on a mobile phone specifically. Each subsection focuses on a specific area e.g. watching video, and thus reports on the relevant online and mobile activities asked.

Figure 61 displays the online activities covered in each subsection (highlighted in green), with the proportion of internet users who cited them in 2014 and 2013.

Figure 61: Online activities ever done by internet users, section groupings

% of internet users	2013	2014	
Watching online video			
Watch online or download short video clips such as music videos or comedy clips (e.g. YouTube)	62%	73%	↑
Watch online or download TV programmes or films (e.g. BBC iPlayer, 4OD, ITV Player, Sky Player etc.)	54%	60%	↑
Listening to audio content			
Listen to or download music online	52%	61%	↑
Listening to radio stations online	32%	37%	
Communicating or participating			
Sending and receiving e-mails	95%	94%	
Looking at social media sites or apps e.g. Facebook, Twitter, LinkedIn, Instagram, Tumblr or Pinterest)	74%	75%	
Using Instant Messaging such as Facebook Chat, MSN Messenger or Skype Chat	69%	75%	↑
Upload or share videos or photos online	-	63%	
Sharing links to websites or online articles – perhaps on Twitter, Facebook, Reddit or LinkedIn	49%	57%	↑
Make or receive telephone or video calls, using services like Skype or FaceTime	42%	56%	↑
Contributed comments to a website or blog	-	47%	
Playing games			
Playing games online	39%	42%	
Browsing, searching for content and accessing news			
General surfing/ browsing the internet	94%	97%	↑
Finding information for your leisure time including cinema and live music	78%	83%	↑
Finding information about health related issues	70%	78%	↑
Looking at news websites or apps	70%	76%	↑
Finding information for your work or your job or your studies	68%	71%	
Looking at job opportunities	49%	57%	↑
Looking at adult-only websites	13%	15%	

% of internet users	2013	2014	
Transacting			
Buying things online	84%	85%	
Selling things online	38%	41%	
Banking and paying bills online	67%	68%	
Accessing public or civic services			
Finding information about public services provided by local or national government	70%	78%	↑
Looking at websites or apps for news about, or events in, your local area/ the local community	56%	69%	↑
Complete government processes online – e.g. tax credits, renew driving licence, car tax or passport, tax return	61%	69%	↑
Looking at political or campaign or issues websites	29%	44%	↑
Sign an online petition	19%	35%	↑
Contact a local councillor or your MP online	13%	19%	↑
Other activities			
Filling in a form or application online	61%	70%	↑
Downloading software	55%	60%	
Setting up or maintaining a website or blog/ weblog	24%	27%	
Doing an online course to achieve a qualification	17%	27%	↑

IN15/ IN16 From this list please tell me the types of things you currently do online and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 1609 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

Similarly, Figure 62 lists the mobile phone activities covered, by sub-section, showing the proportion of mobile phone users who have ever done each of them in 2014 and 2013.

Figure 62: Mobile activities ever done by mobile phone users, section groupings

% of mobile users	2013	2014	
Watching online video			
Visit sites or apps like YouTube or Vine to look at videos or clips posted by other people	45%	58%	↑
Watch TV programmes	22%	30%	↑
Listening to audio content			
Listening to music	48%	57%	↑
Communicating or participating			
Make or receive calls	99%	99%	
Make or receive text messages	94%	95%	
Send or receive photo messages	67%	72%	↑
Send or receive email	55%	63%	↑
Visit social media sites or apps	53%	59%	↑
Use instant messaging	38%	55%	↑
Send or receive video clips	48%	54%	↑
Put photos or videos on sites	38%	50%	↑
Make or receive telephone or video calls over the internet	27%	43%	↑
Send or receive Twitter updates	25%	31%	↑
Playing games			
Playing games loaded onto the phone	46%	47%	
Playing games over the internet using a mobile phone	25%	33%	↑
Transacting			
Checking your bank balance	34%	44%	↑
Buy things from websites or apps using your phone	31%	45%	↑
Other activities			
Take photos	75%	81%	↑
Take videos	54%	62%	↑

M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1465 in 2013, 1670 in 2014).
Arrows show significant changes (99% level) between 2013 and 2014

Within this section we also report on the devices used most often for certain activities, and any other questions asked that have direct relevance (e.g. the reasons for not completing government processes online, in Section 5.9).

5.2 Key findings

- Six in ten internet users (60%) have ever watched or downloaded TV programmes or films online with 27% doing this at least once a week – both these measures have increased since 2013. Laptop/ netbooks are the devices mostly used for this activity.

- Internet users are more likely to have ever listened to or downloaded music online than in 2013, and to have listened to music on their mobile phone; this increase is driven by 35-44 year olds.

- More than seven in ten internet users (72%) have a social media profile – an increase since 2013 (66%), driven by females and those aged 55-64. Half of those with any social media profile (48%) only have one on Facebook, and more than eight in ten (85%) with a social media profile consider Facebook to be their main one.

- More than six in ten with a profile say they visit social media sites more than once a day. While smartphones are the device mostly used for social media (46%) this is more likely for 16-24s (64%) and 25-34s (58%). These two age groups are also most likely to say they visit their profile(s) more than ten times a day (33% for 16-24s and 34% for 25-34s vs. 23% for all).

- Since 2013 there has been an increase in gaming on a smartphone and tablet, while console gaming has decreased. The overall volume of gaming (in terms of hours per week) is unchanged.

- Two online information sources are used by a majority of internet users in 2014, search engines (95%) and Wikipedia (54%).

- When going online for general surfing or browsing, younger adults are more likely to mostly use a smartphone whereas older adults mostly use a desktop PC.

- Going online (through any type of device) for transactional purposes (purchasing and banking/ paying bills online) is unchanged since 2013. However, use of a mobile phone for checking a bank balance or making purchases has increased.

- Going online to undertake public or civic activities is also more likely compared to 2013, with this being more likely in 2014 for 35-44s and those in AB households.

- Compared to 2013, more internet users cite that they have ever filled in application forms (70% vs. 61%), or done an online course to achieve a qualification (27% vs. 17%).

- The proportion of adults taking photos (54% from 48%) or videos (29% from 23%) at least once a week on a mobile phone have both increased since 2013.

5.3 Watching video

Frequency of accessing video content online

Six in ten internet users have ever watched or downloaded TV programmes or films online

Adults who go online at home or elsewhere (86% of all adults) were asked about the frequency with which they undertake two specific activities relating to online video content:

1. Watching online or downloading short video clips such as music videos or comedy clips (such as on YouTube),

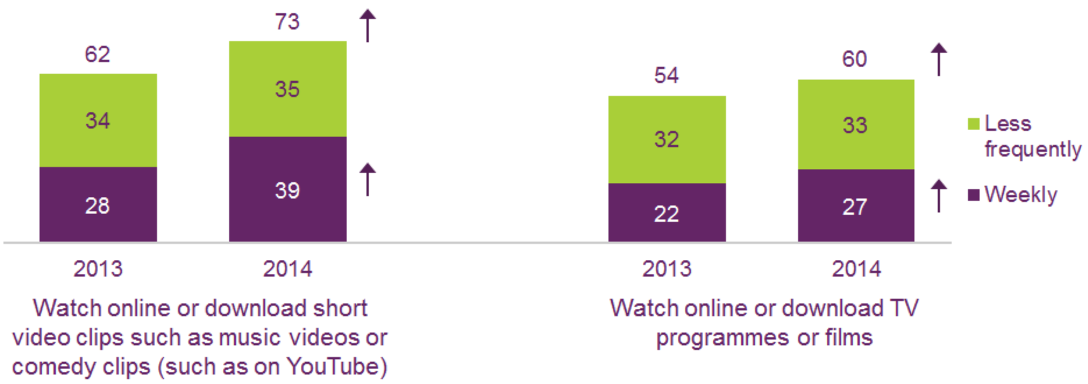
2. Watching online or downloading TV programmes or films (such as BBC iPlayer, 4OD, ITV Player, Sky Player, etc.)

Figure 63 shows the proportion of adult internet users in 2013 and in 2014 who say they ever undertake each online activity, broken out into weekly and less frequent use.

In 2014, close to three in four internet users (73%) have ever watched or downloaded short video clips online, with four in ten doing so weekly (39%). Both of these figures have increased since 2013, when they were 62% and 28% respectively.

Internet users are more likely to say they have ever streamed or downloaded short video clips (73%), than TV or films (60%). However, the latter has also increased since 2013 for both ever (54%) and weekly (27% vs. 22% in 2013).

Figure 63: Watching online video, by activity type: 2013 and 2014



IN15/ IN16 –From this list please tell me the types of things you currently do online and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 1609 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

Figure 33 shows any variation in the weekly incidence of undertaking each of these online activities, by age, socio-economic group and by gender.

Compared to all internet users (39%), 16-24s (65+) and 25-34s (52%) are more likely to stream or download short video clips. In contrast, those aged over 45 years are less likely to do this, ranging from 4% of 75+ year olds to 27% of 45-54s.

16-34s are also more likely to stream or download TV programmes or films on a weekly basis (39% for 16-24s and 33% for 25-34s vs. 27% for all) while those aged 55+ are less inclined (8-15%).

There are no differences by household socio-economic group for either of these measures, and only one difference by gender: men are more likely than women to stream or download short video clips at least weekly (42% vs. 35%).

Figure 64: Watching online video at least weekly, by demographic group

	All internet users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1609**	**240**	**277**	**319**	**265**	**228**	**150**	**130**
Watch online or download short video clips such as music videos or comedy clips (such as on YouTube)	39%	65% ↑	52% ↑	42%	27% ↓	25% ↓	10% ↓	4% ↓
Watch online or download TV programmes or films	27%	39% ↑	33% ↑	30%	23%	15% ↓	13% ↓	8% ↓

	All internet users	AB	C1	C2	DE	Male	Female
Base	**1609**	**404**	**497**	**314**	**394**	**791**	**818**
Watch online or download short video clips such as music videos or comedy clips (such as on YouTube)	39%	39%	40%	37%	37%	42% ↑	35%
Watch online or download TV programmes or films	27%	30%	29%	26%	22%	29%	25%

IN15/ IN16 - From this list please tell me the types of things you currently do online and how often you do each? Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Device used most often for watching TV or films online

Although the laptop/netbook is the device used most often for watching TV or films online, close to a fifth cite a tablet, and a tenth a smartphone (rising to 18% among DEs)

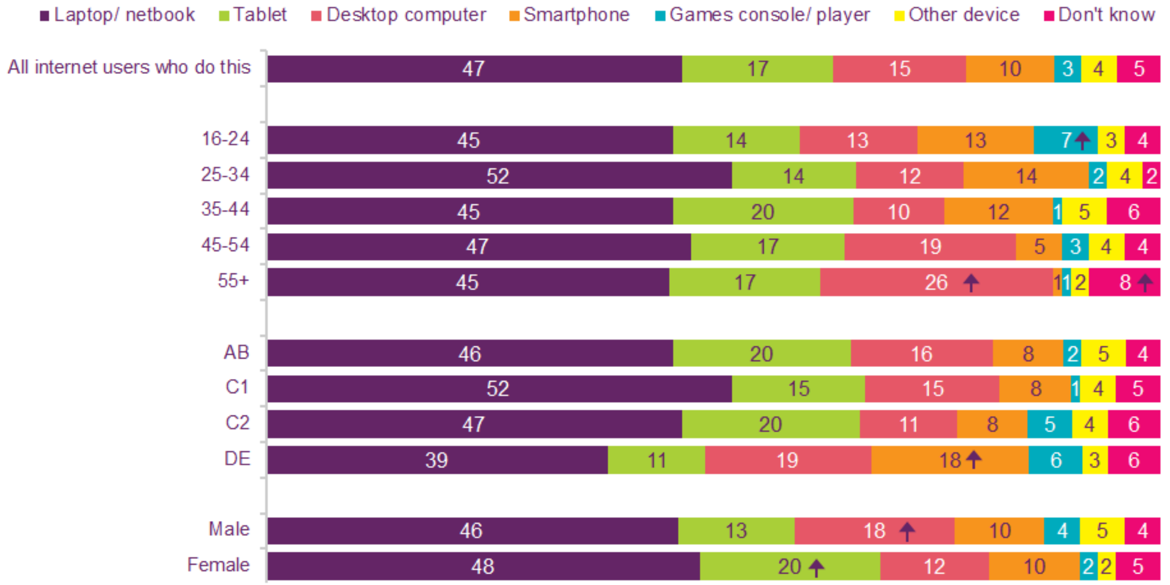
In the previous section of this report we showed how preferences for using internet-enabled devices varied by the online activity conducted. Figure 65 shows the how watching or downloading TV or films online varies by age, socio-economic and gender.

Close to half (47%) of all internet users who ever watch or download TV programmes or films online say they mostly use a laptop or netbook to do so. This incidence does not vary by age, socio-economic group or gender. Those who ever do this activity are as likely to say they mostly use a tablet (17%) as they are to mostly use a desktop computer (15%). One in ten say they mostly use a smartphone (10%) while three percent say they mostly use a games console/ player.

Those aged 55+ are more likely than all adults to say they mostly use a desktop computer to do this activity (26% vs. 15%), but they are less likely to say smartphone (1% vs. 10%). Those aged 16-24s are more likely than average to say they mostly use a games player/ console to watch TV programmes or films online (7% vs. 3%).

The use of a smartphone as the main device to watch TV programmes or films online is more likely among DEs (18% vs. 10%). Men are more likely than women to mostly use a desktop computer (18% vs. 12%) or a games console/ player (4% vs. 2%), whereas women are more likely than men to mostly use a tablet (20% vs. 13%).

Figure 65: Device mostly used to watch TV programmes or films online



IN18D. Which one of these devices do you use most for watching TV programmes or films online?
Base: All adults aged 16+ who ever watch online or download TV programmes or films (894 aged 16+, varies by demographic) . Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Watching video content on a mobile phone

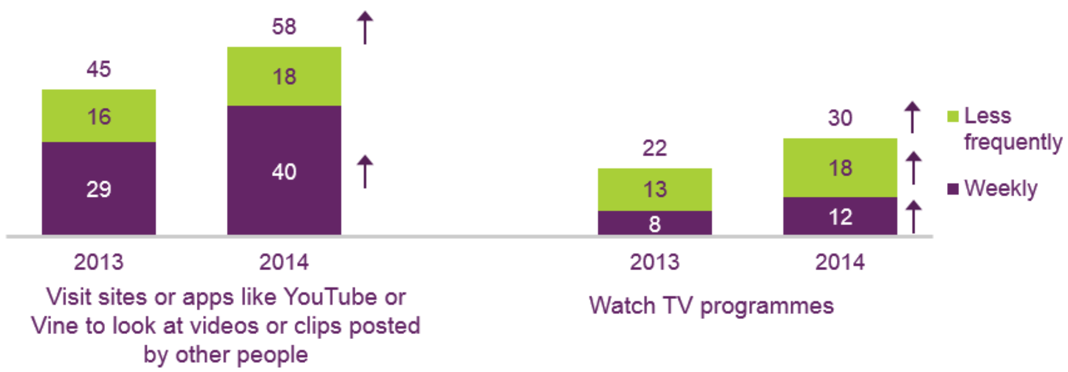
Watching video content via a mobile phone has increased since 2013

Mobile phone users (89% of all adults) were specifically asked about their use of this particular type of device to watch video content.

Figure 66 shows that more than half of mobile phone users have ever visited sites or apps like YouTube or Vine to look at videos or clips posted by other people (58%); this is a thirteen percentage point increase on 2013 (45%). Four in ten do so at least weekly (40%), and that is an eleven percentage point increase (from 29% to 40%).

Since 2013, weekly use of a mobile phone to watch TV programmes has increased to around one in eight (12% from 8%), and so has more infrequent use (18% from 13%), meaning 30% have ever done this activity (22% in 2013).

Figure 66: Watching video content on a mobile phone: 2013 vs. 2014



M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1465 in 2013, 1670 in 2014).
Arrows show significant changes (99% level) between 2013 and 2014

Figure 67 shows any variation in the weekly incidence of undertaking each of these activities using a mobile phone, by age, socio-economic group and by gender.

Compared to all mobile phone users, 16-44s are more likely to visit sites or apps like YouTube or Vine at least weekly to look at videos or clips posted by other people (highest among 16-24s at 68%). Those aged 45 and over are less likely to do this (ranging from zero 75+ year olds to 31% 45-54s). Those aged 16-24 (23%) and 25-34 (18%) are more likely than all (12%) to watch TV programmes on their phone at least weekly, while those aged over 45 are less likely (1-7% of each age group).

There are no differences in weekly use for either activity by household socio-economic group, when compared to all mobile users. However, men are more likely than women to use their phone at least weekly for video clips (43% vs. 37%) and to watch TV programmes on their phone (14% vs. 10%).

Figure 67: Use of a mobile phone at least weekly for watching video content, by demographic group

	All mobile users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1670**	**244**	**281**	**321**	**270**	**243**	**167**	**144**
Visit sites or apps like YouTube or Vine to look at videos or clips posted by other people	40%	68%↑	63%↑	50%↑	31%↓	7%↓	3%↓	0%↓
Watch TV programmes	12%	23%↑	18%↑	15%	7%↓	3%↓	1%↓	1%↓

	All mobile users	AB	C1	C2	DE	Male	Female
Base	**1670**	**399**	**492**	**337**	**442**	**808**	**862**
Visit sites or apps like YouTube or Vine to look at videos or clips posted by other people	40%	42%	42%	39%	35%	43%↑	37%
Watch TV programmes	12%	12%	12%	11%	12%	14%↑	10%

M7: Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

5.4 Listening to audio

Frequency of accessing audio content online

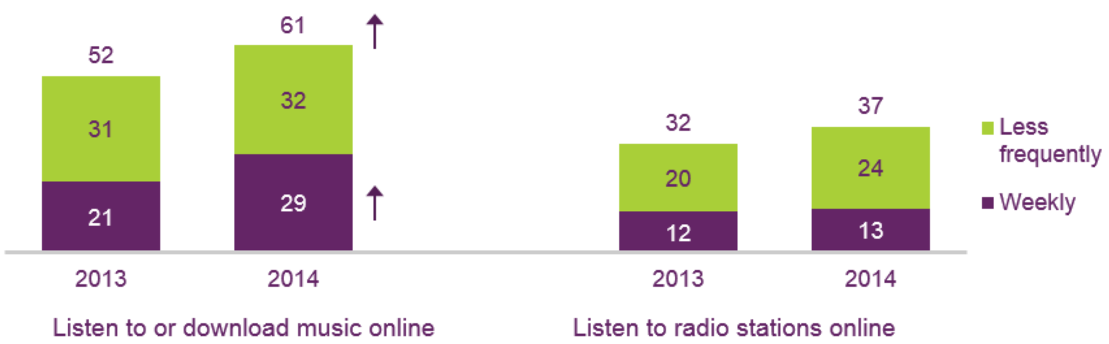
Internet users are more likely to have ever listened to or downloaded music online than in 2013

Adults who go online were asked about the frequency with which they listen to or download music online, and listen to radio stations online.

Figure 68 shows that six in ten internet users have ever listened to or downloaded music online (61%), an increase since 2013 (52%). Three in ten do this weekly (29%), which is also an increase from 2013 (21%).

Around one in eight (13%) internet users listen to radio stations online at least weekly, with more than one in three (37%) having ever done this. Both these measures are unchanged since 2013.

Figure 68: Listening to audio content online: 2013 and 2014



IN15/ IN16 From this list please tell me the types of things you currently do online and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 1609 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

As shown in **Figure** 69 those aged 16-34 (e.g. 53% for 16-24s) are more likely, and those aged 45+ less likely (ranging from 5% of 75+ year olds to 18% of 45-54s), than all internet users (29%) to go online at least weekly to listen to or download music online. Those aged 75+ are the only age group less likely to listen to radio stations online (5% vs. 13% for all adults).

There is only one significant difference by socio-economic group, and that is internet users in AB households are more likely than all adults to go online to listen to radio stations at least weekly (18% vs. 13%).

Men are more likely than women to listen to or download music online (32% vs. 26%) and to listen to radio stations online (16% vs. 11%).

Figure 69: Listening to audio content online at least weekly, by demographic group

All internet users		16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1609**	**240**	**277**	**319**	**265**	**228**	**150**	**130**
Listen to or download music online	29%	53% ↑	43% ↑	26%	18% ↓	14% ↓	12% ↓	5% ↓
Listen to radio stations online	13%	15%	13%	18%	10%	10%	13%	5% ↓

All internet users		AB	C1	C2	DE	Male	Female
Base	**1609**	**404**	**497**	**314**	**394**	**791**	**818**
Listen to or download music online	29%	28%	29%	25%	33%	32% ↑	26%
Listen to radio stations online	13%	18% ↑	14%	10%	10%	16% ↑	11%

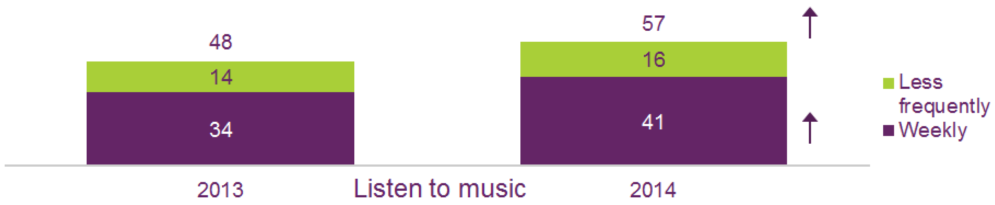
IN15/ IN16 From this list please tell me the types of things you currently do online and how often you do each?
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Listening to music on a mobile phone

A majority of mobile phone users have ever listened to music on their device, and this has increased since 2013, particularly among 35-44 year olds

Figure 70 shows that a majority of mobile phone users have ever listened to music on their mobile phone (57%), which is an increase since 2013 (48%). Four in ten mobile phone users do this at least weekly, also an increase from 2013 (41% vs. 34%). This is driven by 35-44 year olds, which has increased from 31% in 2013 to 50% in 2014.

Figure 70: Use of a mobile for listening to music: 2013 and 2014



M7: Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1465 in 2013, 1670 in 2014
Arrows show significant changes (99% level) between 2013 and 2014

As shown in Figure 71, at least half of 16-24s (75%), 25-34s (59%), and 35-44s (50%) listen to music on their mobile phone at least once a week. In contrast, only a third (33% of 55-64s) or fewer of older age groups do.

Figure 71: Use of a mobile to listen to music at least weekly, by demographic group

All mobile users		16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1670**	**244**	**281**	**321**	**270**	**243**	**167**	**144**
Listen to music	41%	75% ↑	59% ↑	50% ↑	33% ↓	8% ↓	4% ↓	3% ↓

All mobile users		AB	C1	C2	DE	Male	Female
Base	**1670**	**399**	**492**	**337**	**442**	**808**	**862**
Listen to music	41%	40%	44%	42%	38%	44%	39%

M7: Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1465 in 2013, 1670 in 2014
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

5.5 Communicating or participating (including social media)

Frequency of communicating through various methods online

Online (VoIP) calls and Instant Messaging have both increased as weekly activities since 2013

Figure 72 shows the proportion of adult internet users in 2013 and in 2014 who say they have ever (weekly and less frequently) undertaken seven communication and participation activities:

1. Sending and receiving emails
2. Looking at social media sites or apps
3. Using Instant Messaging such as Facebook Chat[37], MSN Messenger or Skype Chat
4. Upload or share videos or photos online
5. Sharing links to websites or online articles e.g. Twitter, Facebook, Reddit or LinkedIn
6. Made or received telephone or video calls using services like Skype or FaceTime
7. Contributed comments to a website or blog

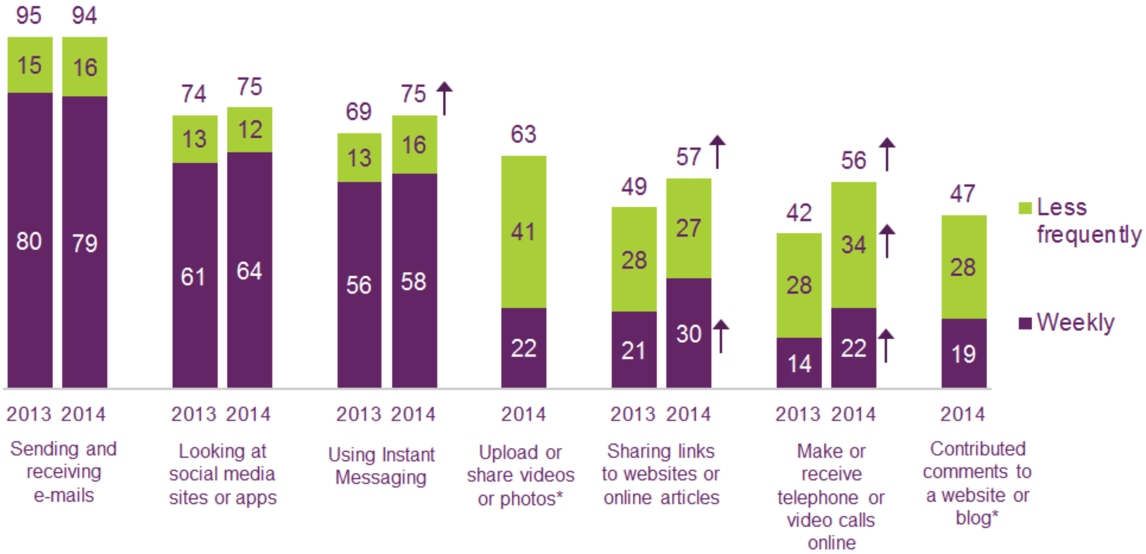
A majority of internet users have ever done six of the seven activities, with the exception being contributing comments to a website or blog (47%). A majority also do three of the activities at least weekly - sending and receiving emails (79%), looking at social media sites or apps (64%) and using Instant Messaging (58%).

On at least a weekly basis, three in ten share links to websites or online articles (30%); while around one in five upload or share videos or photos (22%), make or receive telephone or video calls online i.e. use VoIP (22%), and contribute comments to a website or blog (19%).

Compared to 2013, internet users are more likely to say they have ever gone online to use Instant Messaging services (75% vs. 69% in 2013), to share links to websites or online articles (57% vs. 49%), and to make or receive telephone or video calls online (56% vs. 42%). The last two activities are also higher than 2013 at a weekly level (30% vs. 21% for sharing links, and 22% vs. 14% for VoIP calls).

[37] Note that 'Facebook Chat' is now 'Facebook Messenger'

Figure 72: Online communication and participation: 2013 vs. 2014



IN15/ IN16 –From this list please tell me the types of things you currently do online and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 1609 in 2014)Arrows show significant changes (99% level) between 2013 and 2014

Figure 73 shows any variation in the weekly incidence of undertaking each of these online activities by age, socio-economic group and gender.

Adult internet users aged 35-44 are more likely than all internet users to send or receive emails at least weekly (84% vs. 79%) while those aged 65 and over are less likely to do so (67% for both 65-74s and 75+).

For each of the remaining six online activities shown in Figure 73 those aged 16-24 and 25-34 are more likely than all internet users to undertake each of these activities at least weekly, while those aged 55-64, 65-74 and 75+ are less likely. Adult internet users aged 45-54 are also less likely than all internet users to go online at least weekly to upload or share videos (13% vs. 22%), or to make or receive telephone or video calls online (13% vs. 22%).

There is less variation by socio economic group. Internet users aged 16+ in AB and C1 households are more likely to go online at least weekly for sending/ receiving emails (93% for ABs and 84% for C1s vs. 79% for all), while those in C2 and DE households are less likely to undertake this activity at least weekly (69% for C2s and 63% for DEs vs. 79%). Adult internet users in DE households are more likely than all internet users to go online at least weekly to look at social media sites or apps (71% vs. 64% for all).

There is only one difference by gender: women are more likely than men to go online at least weekly to look at social media sites or apps (67% vs. 60%).

Figure 73: Weekly online communication activities, by demographic group

	All internet users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1609**	**240**	**277**	**319**	**265**	**228**	**150**	**130**
Sending and receiving e-mails	79%	77%	80%	84% ↑	78%	78%	67% ↓	67% ↓
Looking at social media sites or apps	64%	87% ↑	82% ↑	67%	59%	41% ↓	33% ↓	15% ↓
Using Instant Messaging such as Facebook Chat, MSN Messenger or Skype Chat	58%	80% ↑	80% ↑	61%	51%	37% ↓	25% ↓	14% ↓
Sharing links to websites or online articles - perhaps on Twitter, Facebook, Reddit or LinkedIn	30%	45% ↑	43% ↑	32%	25%	17% ↓	8% ↓	4% ↓
Upload or share videos or photos online	22%	36% ↑	36% ↑	22%	13% ↓	10% ↓	3% ↓	3% ↓
Make or receive telephone or video calls, using services like Skype or FaceTime	22%	33% ↑	34% ↑	25%	13% ↓	11% ↓	12% ↓	10% ↓
Contributed comments to a website or blog	19%	31% ↑	26% ↑	22%	16%	8% ↓	6% ↓	0% ↓

	All internet users	AB	C1	C2	DE	Male	Female
Base	**1609**	**404**	**497**	**314**	**394**	**791**	**818**
Sending and receiving e-mails	79%	93% ↑	84% ↑	69% ↓	63% ↓	81%	77%
Looking at social media sites or apps	64%	59%	63%	63%	71% ↑	60%	67% ↑
Using Instant Messaging such as Facebook Chat, MSN Messenger or Skype Chat	58%	58%	57%	56%	61%	55%	61%
Sharing links to websites or online articles - perhaps on Twitter, Facebook, Reddit or LinkedIn	30%	32%	31%	27%	28%	30%	30%
Upload or share videos or photos online	22%	22%	21%	20%	25%	20%	24%
Make or receive telephone or video calls, using services like Skype or FaceTime	22%	25%	22%	21%	20%	24%	20%
Contributed comments to a website or blog	19%	24%	19%	14%	18%	20%	18%

IN15/ IN16 From this list please tell me the types of things you currently do online and how often you do each?
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Communication and participation on a mobile phone

Eight of the ten communication methods covered have increased since 2013.

Mobile phone users were also specifically asked about undertaking activities relating to mobile communication and participation. These ten activities are shown in **Figure** 74.

As was the case in 2013, nearly all mobile users have ever used their mobile phone for making/ receiving calls (99%) and for sending or receiving text messages (95%), with weekly use not being much lower than this for either activity. On a weekly basis more than half use social media (53%) or email (52%) on their device, whereas 42% and 39% use instant messaging and photo messaging respectively. All four of these activities are an increase from 2013 (47%, 44%, 29%, and 32%).

While around half of mobile users have ever sent or received video clips using their phone (54%), or posted photos or videos to social media sites (50%), considerably fewer do this at least weekly (21% and 28% respectively). Less than half of mobile users have ever used their device for telephone or video calls over the internet e.g. Skype (43%), or to send or receive Twitter updates (31%).

A higher proportion (31%) said they had ever sent or received Twitter updates than in 2013 (25%), but at a weekly level it is unchanged (18%).

Figure 74: Use of a mobile phone for communication and participation: 2013 vs. 2014

M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1465 in 2013, 1670 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

Figure 75 shows how the activities vary by age:

- 16-24s and 25-34s are more likely than average to use their phone at least weekly for all ten activities.

- Those aged 35-44 are more likely than all users to use their phone at least weekly for eight of the ten activities shown, but are as likely as all users to use their phone for photo messages or Twitter updates.

- Those aged 45-54 are more likely than all users to use their phone at least weekly for text messages (96% vs. 90% for all), but less likely for four activities: Instant messaging (34%), posting photos or videos on social media sites (19%), sending or receiving video clips (14%) and sending or receiving Twitter updates (11%).

- 55-64 year olds are less likely to use their mobile phone at least weekly for nine of the ten activities – and are as likely as all to use their phone for making/ receiving calls.

- Those aged 65-74 and 75+ are less likely than average to use their phone at least weekly for all ten activities.

Figure 75: Weekly use of a mobile phone for communication, by age

	All mobile users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1670**	**244**	**281**	**321**	**270**	**243**	**167**	**144**
Make or receive calls	94%	99% ↑	98% ↑	97% ↑	97%	91%	81% ↓	69% ↓
Send or receive text messages	90%	100% ↑	98% ↑	98% ↑	96% ↑	85% ↓	64% ↓	42% ↓
Visit social media sites or apps like Facebook, Twitter, LinkedIn, Instagram, Tumblr or Pinterest	53%	82% ↑	81% ↑	66% ↑	46%	15% ↓	13% ↓	3% ↓
Send or receive email	52%	62% ↑	72% ↑	66% ↑	53%	31% ↓	14% ↓	3% ↓
Use Instant Messaging such as Apple iMessage, WhatsApp, Facebook Chat, BlackBerry Messenger/ BBM	42%	68% ↑	64% ↑	51% ↑	34% ↓	13% ↓	6% ↓	2% ↓
Send or receive photo messages	39%	57% ↑	56% ↑	45%	37%	18% ↓	11% ↓	6% ↓
Put photos or videos on sites like YouTube, Facebook or Instagram for others to see	28%	49% ↑	45% ↑	36% ↑	19% ↓	6% ↓	2% ↓	1% ↓
Make or receive telephone or video calls over the internet, using services like Skype or FaceTime	23%	37% ↑	33% ↑	33% ↑	17%	7% ↓	3% ↓	1% ↓
Send or receive video clips	21%	34% ↑	33% ↑	27% ↑	14% ↓	5% ↓	2% ↓	4% ↓
Send or receive Twitter updates using your phone	18%	37% ↑	27% ↑	23%	11% ↓	2% ↓	1% ↓	0% ↓

M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Arrows show significant differences (95% level) for age compared to all internet users

As shown in Figure 76, there are fewer differences by socio-economic group than there are for age. However, where they exist, activities tend to be higher than average among ABs and C1s, and lower among DEs.

Adults in AB households are more likely than all to use their phone at least weekly for two activities: sending or receiving emails (65% vs. 52% for all) and sending or receiving Twitter updates (23% vs. 18% for all). Those in C1 households are more likely to send or receive text messages (94% vs. 90% for all) and email (60% vs. 52%) at least weekly. In contrast, adults in DE households are less likely on four activities: sending or receiving text messages (86% vs. 90% for all), sending or receiving email (35% vs. 52%), making or receiving telephone or video calls over the internet (17% vs. 23%) and sending or receiving Twitter updates (12% vs. 18%).

There are also differences by gender. Women are more likely than men to use their mobile phone at least weekly for calls (95% vs. 92%) and text messages (92% vs. 88%). Men are more likely to use their phone for telephone or video calls over the internet (26% vs. 21%), to send or receive video clips (23% vs. 19%), and for Twitter updates (22% vs. 15%).

Figure 76: Weekly use of a mobile phone for communication, by socio-economic group and gender

	All mobile users	AB	C1	C2	DE	Male	Female
Base	**1670**	**399**	**492**	**337**	**442**	**808**	**862**
Make or receive calls	94%	92%	95%	96%	91%	92%	95% ↑
Send or receive text messages	90%	91%	94% ↑	89%	86% ↓	88%	92% ↑
Visit social media sites or apps like Facebook, Twitter, LinkedIn, Instagram, Tumblr or Pinterest	53%	53%	56%	53%	51%	51%	55%
Send or receive email	52%	65% ↑	60% ↑	47%	35% ↓	54%	51%
Use Instant Messaging such as Apple iMessage, WhatsApp, Facebook Chat, BlackBerry Messenger/ BBM	42%	42%	46%	41%	38%	40%	44%
Send or receive photo messages	39%	42%	42%	33%	36%	37%	41%
Put photos or videos on sites like YouTube, Facebook or Instagram for others to see	28%	30%	27%	29%	27%	26%	30%
Make or receive telephone or video calls over the internet, using services like Skype or FaceTime	23%	28%	27%	19%	17% ↓	26% ↑	21%
Send or receive video clips	21%	24%	22%	18%	19%	23% ↑	19%
Send or receive Twitter updates using your phone	18%	23% ↑	20%	17%	12% ↓	22% ↑	15%

M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each? Arrows show significant differences (95% level) for socio-economic group compared to all internet users, and males compared to females.

Social media profiles

More than seven in ten internet users have a social media profile

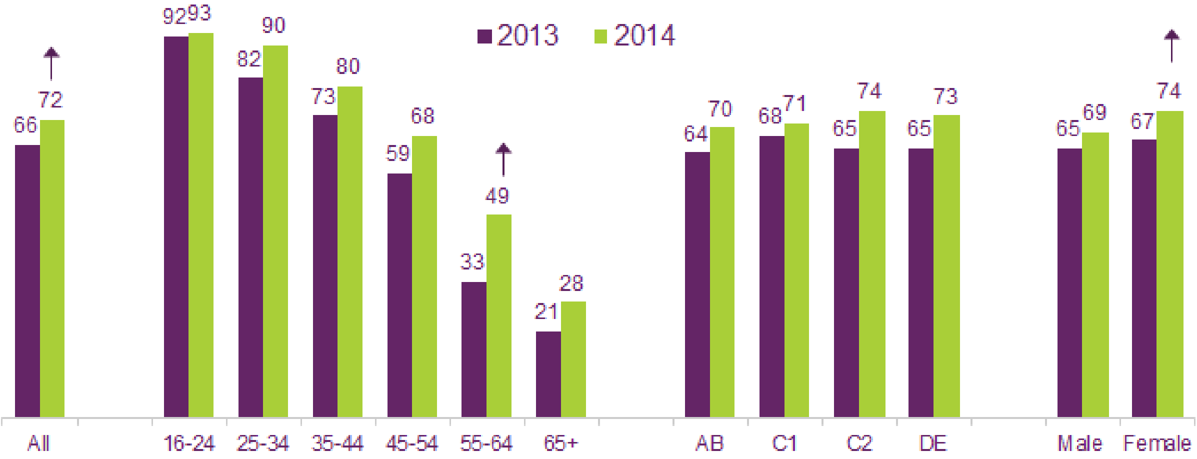
More than seven in ten (72%) have a social media profile, which has increased since 2013 (from 66%)[38]. Internet users aged 55-64 (49% and 33%) and women (74% vs. 64%) are more likely to have a profile than in 2013, as displayed in Figure 77.

A majority of internet users aged 16-24 (93%), 25-34 (90%), 35-44 (80%) and 45-54 (68%) have a social media profile. This compares to half of 55-64s (49%) and three in ten aged 65+ (28%).

A majority of internet users from all four socio-economic groups also have a social media profile and there is no significant variation to the overall measure (72%) by socio economic group or gender.

[38] In 2014 respondents were asked whether they had a social media profile or account on any sites or apps, whereas in 2013 respondents were asked whether they had ever set up their own social networking site page or profile on a site or app such as Facebook, Twitter, LinkedIn, Instagram, Tumblr or Pinterest. The difference in question wording could , therefore, account for some of the differences shown since 2013

Figure 77: Incidence of having a social media profile, by demographic group: 2013 vs. 2014



IN24. I'd now like to ask you some questions about social media (DESCRIPTION OF SOCIAL MEDIA). Do you have a social media profile or account on any sites or apps
Base: All adults aged 16+ who go online at home or elsewhere (1609 in 2014, 404 AB, 497 C1, 314 C2, 394 DE, 791 male, 818 female). Arrows show significant changes (99% level) between 2013 and 2014

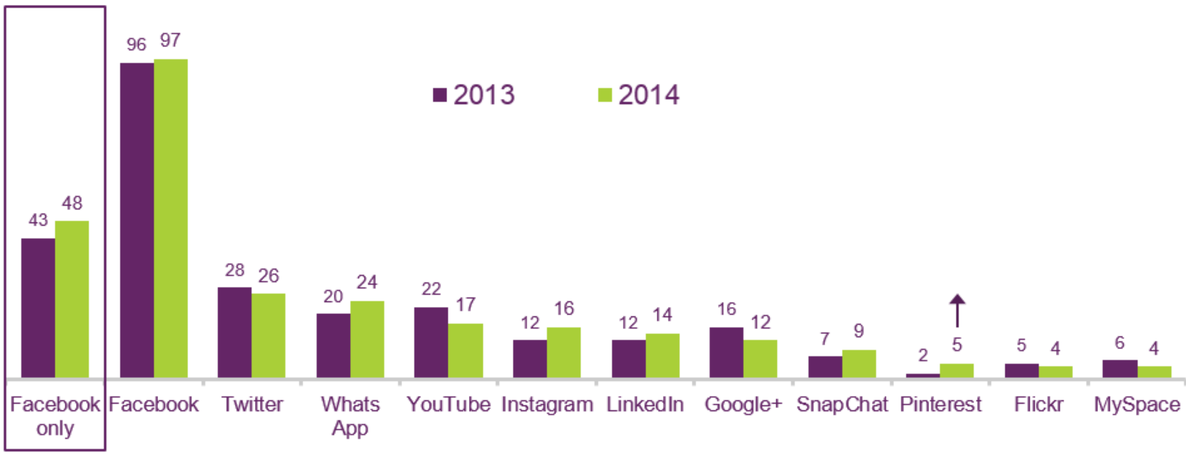
Among those with a social media profile, there has been little change since 2013 in the sites or apps used.

As shown in Figure 78, almost all (97%) adults with a social media profile say they use Facebook. No other site/service is used by a majority of those with a social media profile. Close to half (48%) of those with a profile say they only have one on Facebook.

Around a quarter of those with a social media profile have one on Twitter (26%) and WhatsApp (24%), with lower proportions for YouTube (17%) Instagram (16%), LinkedIn (14%), Google+ (12%) and SnapChat (10%). All other prompted social media sites were used by fewer than one in ten.

There is only one significant change since 2013: adults with a social media profile are more likely to say they use Pinterest (5% vs. 2%).

Figure 78: Social media sites used: 2013 and 2014



IN25 – Which sites or apps do you have a page or profile on?
Base: All adults aged 16+ with a social media profile (1093 in 2014). Responses of 3% or more shown
Arrows show significant changes (99% level) between 2013 and 2014

While not charted, there are differences by age:

- Compared to all adults with a profile, 16-24s are more likely to have a profile on seven of the eleven social media sites/apps shown above - Twitter (40%), WhatsApp (37%), YouTube (32%), Instagram (35%), SnapChat (26%), Tumblr (8%) and Vine (4%). This age group are less likely to have a profile on LinkedIn (8% vs. 14%), whereas 35-44s are more likely to (22%).

- Those aged 45-54 are less likely to have a profile on Twitter (13%), YouTube (9%), Instagram (5%), SnapChat (3%) and Pinterest (1%). Those aged 55 and over[39] are also less likely to have a profile on Facebook (93%), Twitter (13%), WhatsApp (7%), YouTube (9%), Instagram (3%) LinkedIn (8%) and SnapChat (0%).

- There are also differences by socio-economic group. AB adults are more likely to have a profile on Twitter (33%), LinkedIn (26%) and Flickr (7%). Those in C2 and DE households are both less likely to have a profile on LinkedIn (4% for C1s and 3% for DEs), and DEs are less likely to have a profile on Twitter (14%).

- Men are more likely than women to have a profile on Twitter (30% vs. 23%), YouTube (22% vs. 13%), LinkedIn (19% vs. 10%) and Vine (3% vs. 0%), while women are more likely to have a profile on Facebook (99% vs. 95%), and Pinterest (7% vs. 3%).

More than eight in ten social media users consider their Facebook profile to be their main social media site

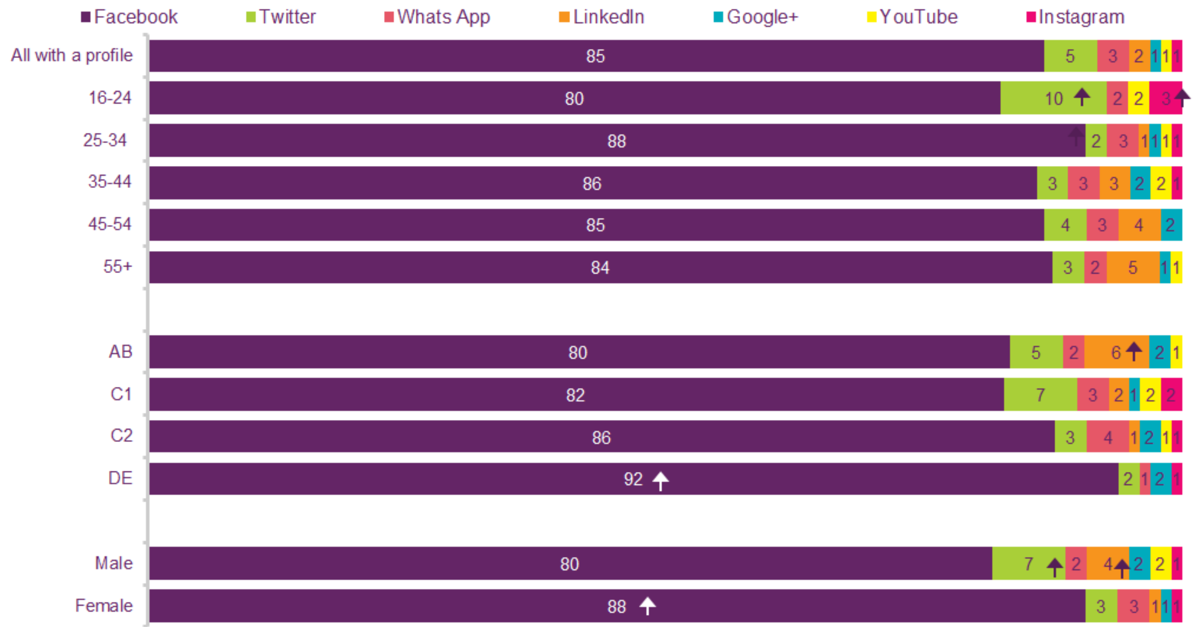
In addition to asking respondents about the social media sites or apps they have a profile on, they were asked to nominate the one they considered to be their main one i.e. use most often. Results are shown in Figure 79.

More than eight in ten with a social media profile on any site or app consider Facebook to be their main profile (85%) with one in twenty (5%) nominating Twitter. Fewer than five per cent nominated WhatsApp, LinkedIn, Google+, YouTube or Instagram.

There are some differences to these overall measures by demography. 16-24s are more likely to nominate Twitter (10% vs. 5%) or Instagram (3% vs. 1%) as their main profile, ABs are more likely to say LinkedIn (6% vs. 2%) and DEs are more likely to nominate Facebook (92% vs. 85%). Facebook is also more likely to be nominated by women (88% vs. 80% men), whereas men are more likely than women to say that either Twitter (7% vs. 3% women) or LinkedIn (4% vs. 1%) is their main profile.

[39] Analysis undertaken among those aged 55+ due to relatively low base size for aged 65+

Figure 79: Service considered as main social media profile, by demographic group



IN26 – And which one would you say is your main social media site or app – the one you use most often?
Base: All adults aged 16+ with a social media profile (1093 aged 16+,varies by demographic).
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Frequency of visiting social media sites or apps

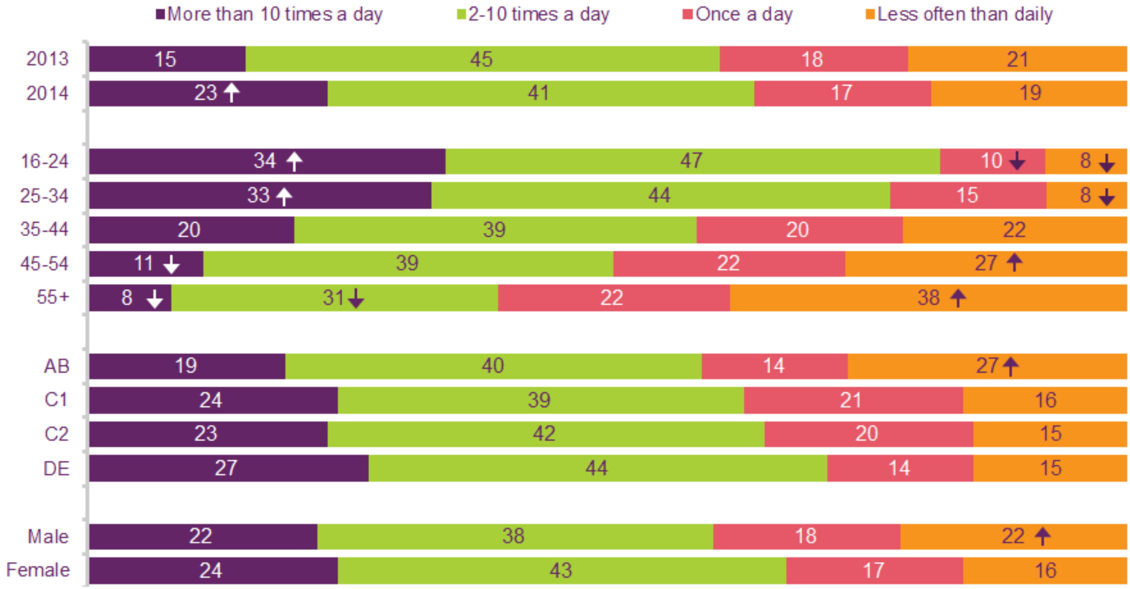
Two thirds of adults with a profile use social media more than once a day

As shown in Figure 80, close to one in four (23%) say they visit social media profiles more than ten times a day, and this has increased since 2013. In total, eight in ten (81%) do so at least daily.

A third of those aged 16-24 (34%) and 25-34 (33%) with a social media profile visit more than ten times a day, and this is more likely than average (23%). In contrast those aged 45-54 (11%) and 55+ (8%) are less likely.

Men (22%).are more likely than women (16%) to say they visit less often than daily.

Figure 80: Frequency of visiting any social media sites or apps, by year and demographic group



IN27– How often do you visit any social media sites or apps, using any device? Base: All with social media profile (1093 in 2014) Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Device used most often for social media

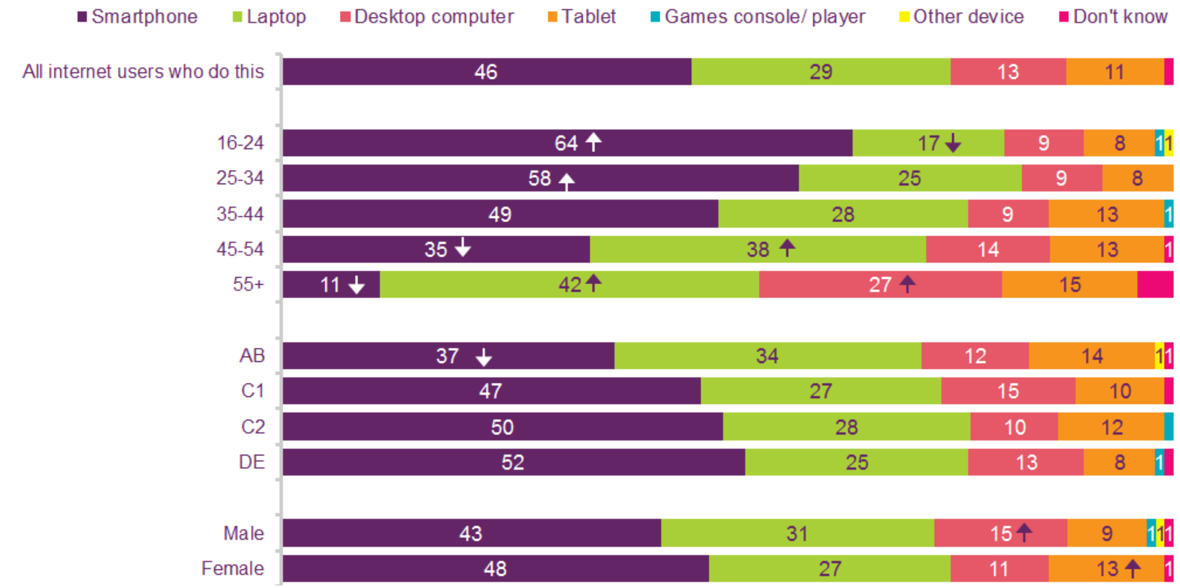
Social media is most commonly undertaken on a smartphone, particularly for younger adults.

In the previous section of this report we showed how preferences for using internet-enabled devices varied by the online activity conducted. Figure 81 shows how device usage for social media varies by age, socio-economic and gender among those who ever go online to look at social media sites or apps.

Close to half (46%) of all internet users who ever go online to look at social media sites or apps say they mostly use a smartphone to do so. This is more likely among 16-24s (64%) 25-34s (58%) and less likely for those aged 45-54 (35%) or 55+ (11%).Three in ten internet users (29%) say they mostly use a laptop for social media, with this being more likely for 45-54s (38%) and 55+ (42%). While around one in eight (13%) of those who ever go online to look at social media sites or apps say they mostly use a desktop computer for it, this is twice as likely for those aged 55+ (27%).

One in ten adults (11%) say they mostly use a tablet for social media. There are no variations by age, and there is only one difference by household socio-economic group - ABs are less likely to say they mostly use a smartphone for social media (37% vs. 46%).Men (15%) are more likely than women to cite a desktop computer (11%), while women are more likely to say they mostly use a tablet (13% vs. 9%).

Figure 81: Device mostly used for social media, by demographic group



IN18C. Which one of these devices do you use most for social media?
Base: All adult s aged 16+ who go online at home or elsewhere and who ever look at social media sites or apps (1147 aged 16+, varies by demographic)
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Apps versus browsers – Social Media

There is evidence of a preference for using social media through apps rather than through a web browser among those who use social media apps at all.

As mentioned earlier in Section 4 of this report, in 2014, app users were asked to think about their main device for using apps and to indicate the extent to which they access the content through an app or a browser, for certain activities. The most popular activity in terms of the proportion who always or mostly use an app was shown to be social media.

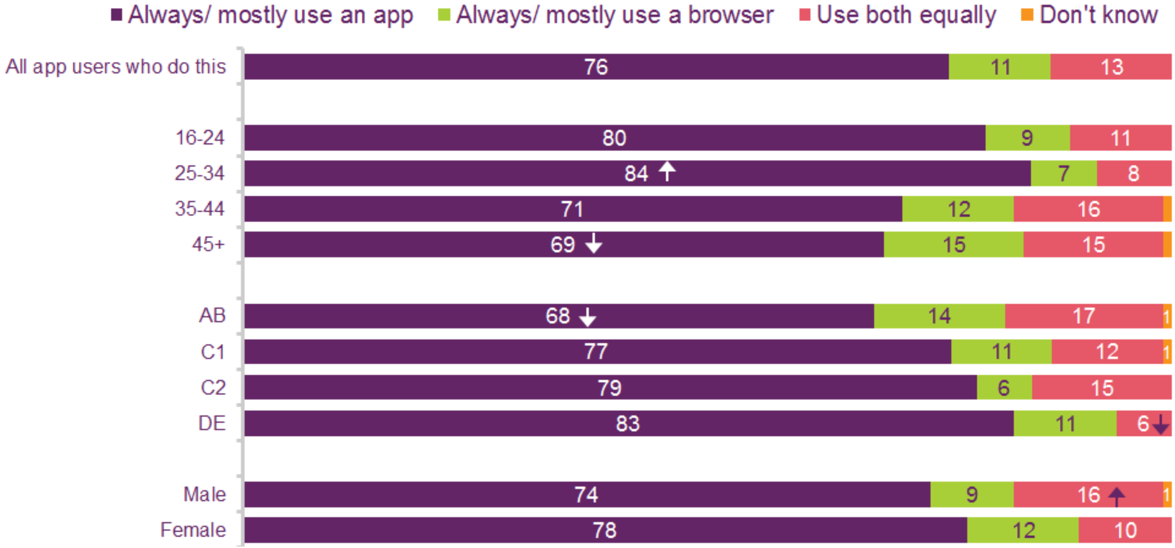
Figure 82 shows the results for social media[40], at an overall level and by age, socio-economic group and gender.

Three in four app users (76%) say they always/ mostly use an app (on their main device for using apps) for accessing social media sites. Compared to all, mostly using an app is more likely among 25-34s (84% vs. 76%) and less likely among those aged 45 and over (69% vs. 76%) and those in AB households (68%). One in ten app users say they always/ mostly use a browser to access social media sites (11%) and this figure does not vary by age, socio-economic group or gender.

One in eight (13%) app users say they use apps and browsers equally to access social media content, although this is less likely among app users in DE households (6% vs. 13%) and is more likely for men compared to women (16% vs. 10%).

[40] App users were also given the option to say that they never visit social media sites on their main device for using apps and for the purpose of this analysis these respondents have been excluded from the data shown in the chart.

Figure 82: Using an app versus using a browser for social media, by demographic group



IN22D:…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?
Base: Adults aged 16+ who use social media apps (908 aged 16+, varies by demographic)
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

5.6 Gaming

Gaming across devices

Gaming on a smartphone and tablet have seen an increase since 2013 – while console gaming has decreased

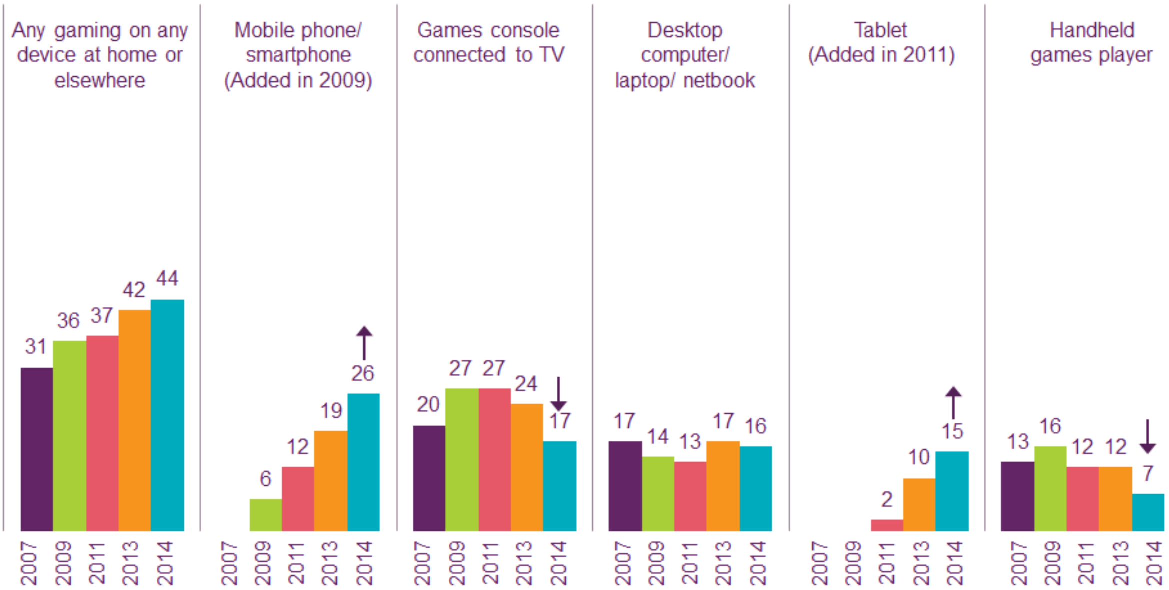
All adults were shown a list of devices that can be used for gaming and were asked to say which they ever used to play games at home or elsewhere (see Figure 83)[41]. More than four in ten UK adults use any of the devices we asked about for gaming, which is unchanged since 2013 (44% vs. 42%).

One in four adults play games anywhere on a mobile phone (26%), with a similar proportion doing so on a games console connected to a TV (17%), on a desktop computer/ laptop/ netbook (16%), or on a tablet (15%). Fewer than one in ten adults (7%) say they play games on a handheld games console (such as a Sony PSP or Nintendo 3DS).

Compared to 2013, adults are more likely to play games on a mobile phone/ smartphone (26% vs. 19% in 2013) and on a tablet (15% vs. 10% in 2013), while gaming on a console connected to a TV has declined (17% vs. 24% in 2013) as has gaming on a handheld games player (7% vs. 12% in 2013).

[41] Devices shown in the chart are those attracting responses of more than 1% of adults interviewed.

Figure 83: Devices used for gaming at home or elsewhere: 2007-14



G1 – Do you ever play games at home or elsewhere in any of these ways?
Base: All adults aged 16+ (1890 in 2014).
Arrows show significant changes (99% level) between 2013 and 2014

As shown in Figure 84 compared to all adults, in 2014 younger adults aged from 16 to 44 are more likely to use any of the devices for gaming (73% for 16-24s, 62% for 25-34s and 51% for 35-44s vs. 44% of all adults), while adults aged 55 and over are less likely (26% for 55-64s, 19% for 65-74s, and 7% for 75+ vs. 44% for all adults).

- 16-24s are more likely than all adults to play games on all six of the devices.
- 25-34s are more likely to game on mobile phones (40% vs. 26%), on a games console connected to a TV (29% vs. 17%) and on a handheld games console (12% vs. 7%).
- The only device that 35-44s are more likely to play games on is a mobile phone (35% vs. 26%).
- 45-54s are less likely to play games on a games console connected to a TV (10% vs. 17%).
- 55-64s are less likely to play games on a mobile phone (9% vs. 26%), on a games console connected to a TV (6% vs. 17%), on a tablet computer (8% vs. 15%), or on a handheld games console (0% vs. 7%).
- Adults aged 65-74 and 75+ are less likely than all adults to play games on all of the six of the devices shown.

Figure 84: Devices used for gaming at home or elsewhere, by age

	All adults	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	1890	254	288	327	284	276	221	240
Any gaming in any location	44%	73% ↑	62% ↑	51% ↑	39%	26% ↓	19% ↓	7% ↓
Mobile phone	26%	49% ↑	40% ↑	35% ↑	22%	9% ↓	5% ↓	0% ↓
Games console connected to a TV	17%	39% ↑	29% ↑	18%	10% ↓	6% ↓	3% ↓	0% ↓
Desktop computer/ laptop/ netbook	16%	26% ↑	20%	19%	14%	13%	9% ↓	4% ↓
Tablet	15%	24% ↑	19%	19%	12%	8% ↓	7% ↓	2% ↓
Handheld games player	7%	18% ↑	12% ↑	7%	5%	0% ↓	1% ↓	1% ↓

G1 – Do you ever play games at home or elsewhere in any of these ways?
Arrows show significant differences (95% level) for age compared to all internet users

The overall incidence of gaming does not differ in 2014 by socio-economic group. However, compared to all adults those in DE socio-economic group are less likely to play games on a tablet (11% vs. 15%).

As in previous years, men are more likely than women to play games on any gaming device (47% vs. 41%), and are more likely to play on a console connected to a TV (24% vs. 11%) or on a handheld games player (9% vs. 5%). In contrast, gaming via mobiles (29%) and tablets (14-15%) are even across the two genders.

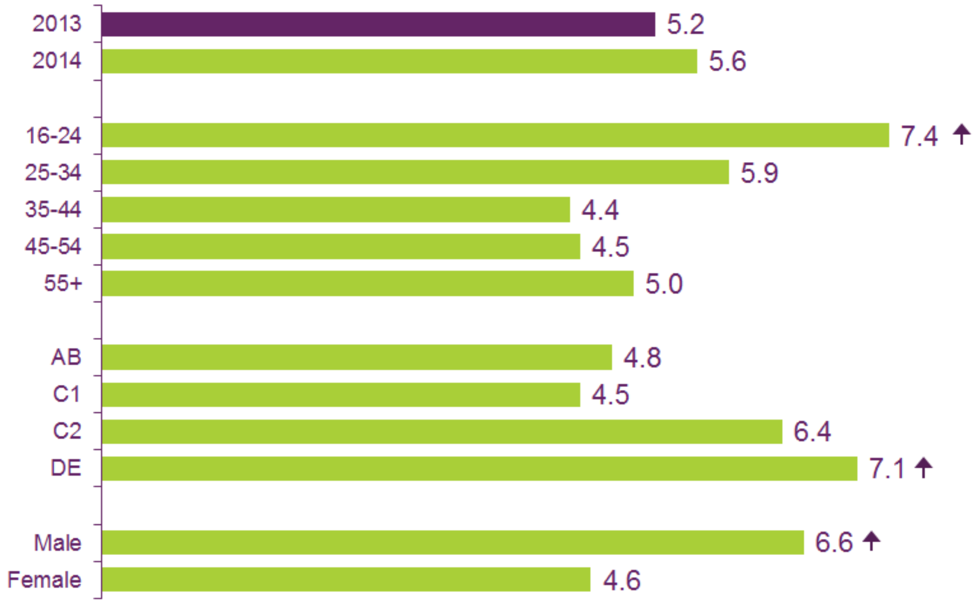
Volume of gaming per week

16-24s, DEs and men record the highest volumes of weekly game playing

Adults who use any of the devices for gaming at home or elsewhere were asked to estimate how many hours per week they spent doing it. Because these estimates are self-reported, it is likely that a degree of under- and over-reporting will be present, and the estimates shown should be taken as indicative only.

The average volume of gaming in 2014 is 5.6 hours per week, which has not changed since 2013 (5.2 hours). 16-24s (7.4 hours) and adults in DE socio-economic groups (7.1 hours) say they play for more hours per week compared to all adults (5.6 hours). Men say they play for more hours per week than women (6.6 vs. 4.6 hours).

Figure 85: Volume of gaming per week, by year and demographic group



G2 – Please think about the hours that you spend game playing in a typical week – so both weekdays and at the weekend... How many hours in a typical week would you say you play games?
Base: All adults aged 16+ who play games at home or elsewhere (743 in 2014, varies by demographic).
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Frequency of playing games online

Four in ten internet users play games online

Adults who go online at home or elsewhere were asked about the frequency with which they play games online.

Figure 86 shows the proportion of adult internet users in 2013 and in 2014 who say they ever undertake this online activity, with this overall measure also broken out into weekly use and use less frequently than weekly.

In 2014, four in ten internet users (42%) have ever played games online, with one in five internet users doing so weekly (22%). There has been no change in either of these measures since 2013.

Figure 86: Playing games online: 2013 vs. 2014

IN15/IN16 –From this list please tell me the types of things you currently do online and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 1609 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

As shown in Figure 87, 16-24s are more likely to play games online at least weekly (33% vs. 22%) while 45-54s (15%), 55-64s (14%) and those aged 75+ (12%) are less likely. There are no statistically significant differences by socio-economic group or gender.

Figure 87: Playing games online at least weekly, by demographic group

	All internet users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	1609	240	277	319	265	228	150	130
Playing game online	22%	33% ↑	27%	23%	15% ↓	14% ↓	17%	12% ↓

	All internet users	AB	C1	C2	DE	Male	Female
Base	1609	404	497	314	394	791	818
Playing games online	22%	20%	19%	23%	27%	24%	20%

IN15/ IN16 –From this list please tell me the types of things you currently do online and how often you do each?
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females..

Gaming on a mobile phone

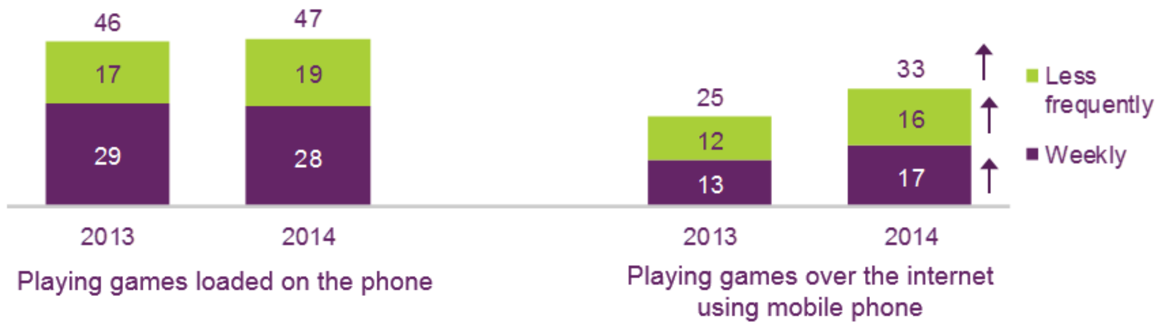
Playing games online using a mobile phone is more likely compared to 2013

Mobile phone users were also asked about their use of a mobile phone for gaming. As shown in Figure 88, fewer mobile users say they have ever used their phone to play games over the internet (33%) than said they had ever played games loaded on their phone (47%).

Close to one in five mobile users (17%) say they play games over the internet using their mobile phone at least weekly, rising to 33% ever. Both figures are increases on 2013 (where they were 13% and 25% respectively).

Close to half of mobile phone users have ever played games loaded on the phone (47%) with more than one in four doing so at least weekly (28%). These figures are unchanged since 2013.

Figure 88: Use of a mobile phone for gaming: 2013 vs. 2014



M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1465 in 2013, 1670 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

Figure 89 shows any variation in the weekly incidence of undertaking each of these activities using a mobile phone, by age, socio-economic group and by gender in 2014.

Compared to all mobile phone users, 16-24s and 25-34s are more likely to play games loaded on their phone and to play games over the internet using their phone while those aged 55-64, 65-74 and 75+ are less likely to use their phone for both types of gaming.

There are no differences in weekly use for either activity by household socio-economic group, when compared to all mobile users. Men are more likely than women to use their phone at least weekly for both activities shown.

Figure 89: Use of a mobile phone at least weekly for gaming, by demographic group

	All mobile users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1670**	**244**	**281**	**321**	**270**	**243**	**167**	**144**
Playing games loaded on the phone	28%	51% ↑	45% ↑	31%	18% ↓	8% ↓	7% ↓	3% ↓
Playing games over the internet using mobile phone	17%	30% ↑	27% ↑	20%	14%	3% ↓	3% ↓	3% ↓

	All mobile users	AB	C1	C2	DE	Male	Female
Base	**1670**	**399**	**492**	**337**	**442**	**808**	**862**
Playing games loaded on the phone	28%	24%	28%	28%	33%	32% ↑	25%
Playing games over the internet using mobile phone	17%	20%	16%	14%	19%	20% ↑	15%

M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each? Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

5.7 Browsing, searching for content and accessing news

Accessing online information sources

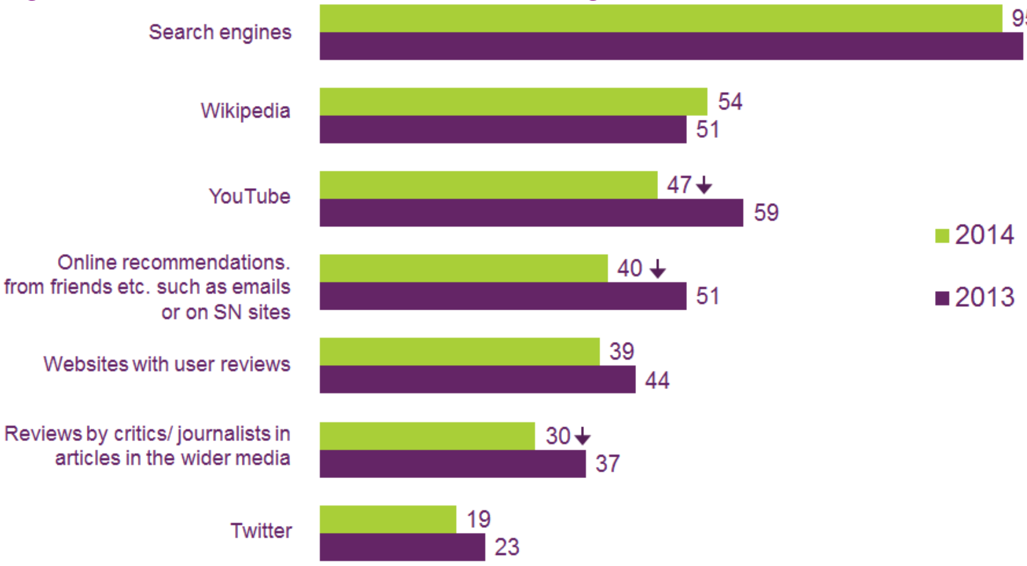
Search engines and Wikipedia are the most cited online information sources

Adults who go online were prompted with a list of seven possible sources of information and were asked which if any sources they had ever used to look for information online. **Figure** 90 shows the results for 2013 and 2014.

There are two sources that have ever been used by a majority of internet users - search engines (95%) and Wikipedia (54%). Close to half have also used YouTube (47%) with four in ten having ever used online recommendations from friends (40%) or websites with user reviews (39%). Reviews by critics or journalists from articles in the wider media have ever been used by three in ten (30%) internet users, while Twitter has ever been used as an information source by one in five (19%).

Compared to 2013, there has been a decrease in the use of four sources when looking for information online - Search engines (95% from 98%), YouTube (47% vs. 59%), Online recommendations (40% vs. 51%), and reviews by critics or journalists from articles in the wider media (30% vs. 37%).

Figure 90: Sources ever used when looking for information online: 2013 vs. 2014



IN46:...Which if any of these sources have you ever used to look for information online?
Base: Adults aged 16+ who go online at home or elsewhere (1032 in 2013, 1609 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

The following age differences are evident from Figure 91:

- Those aged 16-24 are more likely than all internet users to have looked for information online using YouTube (57% vs. 47%) and Twitter (30% vs. 19%).
- Twitter is also more likely to have been used by 25-34s (27%).
- 35-44 year olds are more likely to have ever used two information sources: YouTube (55% vs. 47%) and online recommendations from friends (49% vs. 40%).
- 45-54 year olds are less likely to cite Twitter (11%)
- YouTube (34% vs. 47%), online recommendations from friends (32% vs. 40%), and Twitter (10% vs. 19%) are all lower among 55-64s.
- 65-74 year olds are less likely to have used five of the seven sources for information: Wikipedia (45% vs. 54%), YouTube (32% vs. 47%), online recommendations from friends (26% vs. 40%), reviews by critics or journalists from articles in the wider media (20% vs. 30%) and Twitter (6% vs. 19%).
- Internet users aged 75+ are less likely to use all seven sources.

Figure 91: Sources ever used when looking for information online, by age

	All internet users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	1609	240	277	319	265	228	150	130
Search engines	95%	97%	96%	95%	95%	92%	96%	88% ↓
Wikipedia	54%	60%	57%	58%	48%	52%	45% ↓	30% ↓
YouTube	47%	57% ↑	54%	55% ↑	43%	34% ↓	32% ↓	12% ↓
Online recommendations from friends	40%	46%	41%	49% ↑	35%	32% ↓	26% ↓	26% ↓
Websites with user reviews	39%	37%	42%	44%	36%	41%	33%	22% ↓
Reviews by critics/ journalists in articles in the wider media	30%	35%	29%	35%	27%	30%	20% ↓	19% ↓
Twitter	19%	30% ↑	27% ↑	22%	11% ↓	10% ↓	6% ↓	4% ↓

IN46 Please think about when you want to look for information about something online? Which if any of these sources have you ever used to look for information online?
Arrows show significant differences (95% level) for age compared to all internet users

By social grade there are also several significant differences (compared to all internet users), and these are shown in Figure 92:

- AB households are more likely to have looked online for information using six of the seven sources. The only exception is search engines (96%).
- Adults in C1 households are more likely to cite user reviews (46% vs. 39%).
- C2s and DEs are less likely to have looked online for information using any of the sources, except for search engines (93%) and YouTube (41%).

There are three sources that are higher among men than women - Wikipedia (58% vs. 51%), reviews by critics/ journalists in articles in the wider media (35% vs. 26%) and Twitter (23% vs. 15%).

Figure 92: Sources used when looking for information online, by socio-economic group and gender

	All internet users	AB	C1	C2	DE	Male	Female
Base	1609	404	497	314	394	791	818
Search engines	95%	96%	96%	96%	93%	96% ↑	95%
Wikipedia	54%	69% ↑	59%	44% ↓	39% ↓	58%	51%
YouTube	47%	53% ↑	49%	42%	41%	49%	45%
Online recommendations from friends	40%	49% ↑	45%	32% ↓	28% ↓	42%	38%
Websites with user reviews	39%	55% ↑	46% ↑	28% ↓	19% ↓	40%	38%
Reviews by critics/ journalists in articles in the wider media	30%	41% ↑	35%	22% ↓	17% ↓	35% ↑	26%
Twitter	19%	25% ↑	23%	12% ↓	12% ↓	23% ↑	15%

IN46 Please think about when you want to look for information about something online? Which if any of these sources have you ever used to look for information online? Arrows show significant differences (95% level) for socio-economic group compared to all internet users, and males compared to females.

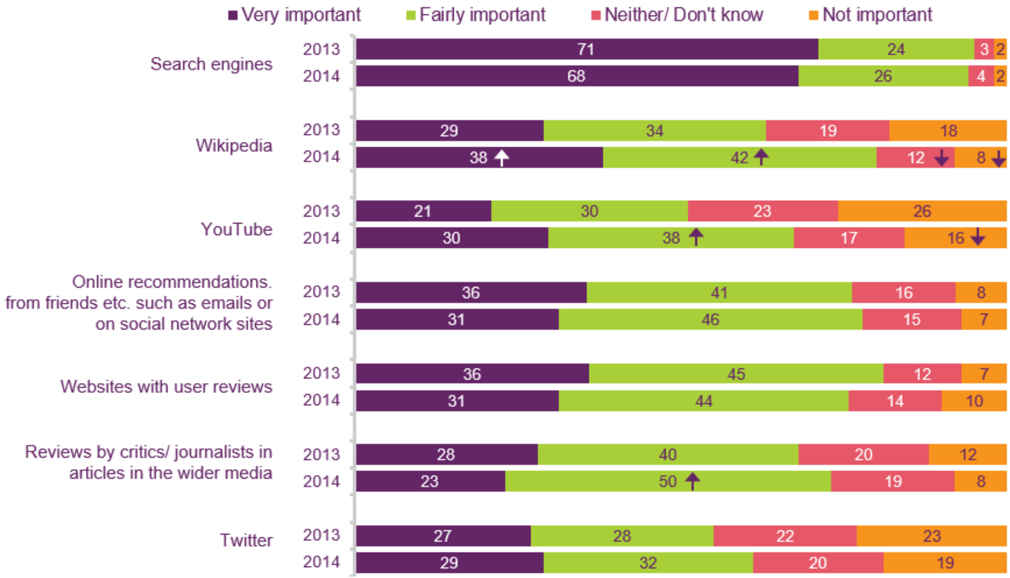
Search engines are considered the most important source, by far

Users of each online information source were then asked to say how important they considered that source. Results are shown in Figure 93.

There is only one source that a majority of users consider to be very important for information: search engines (68%). The other six information sources are mainly considered fairly important. There are two information sources considered 'not important' among more than one in ten users: Twitter (19%) and YouTube (16%).

Compared to 2013, users of Wikipedia are more likely to say they consider this online information source to be very important (38% vs. 29%) or fairly important (42% vs. 34%). YouTube users are also more likely to say they consider it a very important (30% vs. 21%) or fairly important (38% vs. 30%) source of information.

Figure 93: Importance of each information source used: 2013 vs. 2014



IN47A-G – Please use this card to say how important each of the following sources of information are to you…
Base: All adults aged 16+ who go online at home or elsewhere who use each source (variable base).
Arrows show significant changes (99% level) between 2013 and 2014

Reading online reviews is more popular than posting online reviews

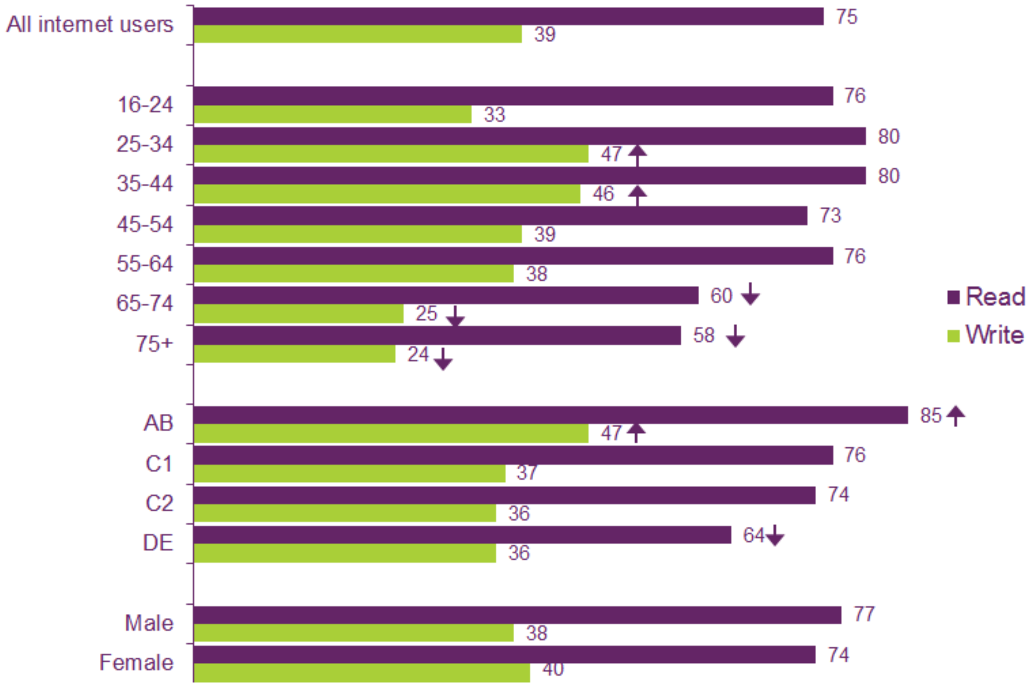
Internet users were asked whether (ahead of any decision to purchase a product or service) they read any online reviews about that product or service by members of the public. They were also asked whether they had ever written any online reviews for other people to read after they had purchased a product or service. The results for both these questions are shown at an overall level, by age, socio-economic group and gender in Figure 94.

While three quarters of internet users (75%) ever read reviews, only four in ten (39%) have ever written them. For each of the age and socio-economic groups, reading online reviews is more likely than writing them. Adult internet users aged 25-34 (47%) and 35-44 (46%) are more likely than all internet users (39%) to have ever written online reviews about a product or service, while those aged 65+ are less likely (25% of 65-74, and 24% of 75+).

By socio-economic group, internet users in AB households are the most likely to have read (85%) and written online reviews (47%), whereas DEs are less likely than average to have done the former (64% v 75%)

There are no significant differences by gender.

Figure 94: Reading and writing online reviews, by demographic group



IN48/ IN49 - Before you decide to purchase a product or use a service, do you read reviews that other members of the public have written or posted online about that product or service? / After purchasing a product or using a service, do you write online reviews for other people to read about that product or service
Base: All adults aged 16+ who go online at home or elsewhere (1609 in 2014, varies by demographic)
Arrows show significant differences (95% level) for socio-economic group compared to all internet users, and males compared to females.

Frequency of browsing and searching for content online

There has been an increase since 2013 in weekly use of the internet for browsing and searching for content online

Out of the thirty two individual online activities that internet users were asked about, seven activities relate specifically to browsing or searching for information. These are:

- General surfing/ browsing the internet
- Finding information for your leisure time including cinema and live music
- Finding information about health related issues
- Looking at news websites or apps
- Finding information for your work or your job or your studies
- Looking at job opportunities
- Looking at adult-only websites

Figure 95 shows the proportion of adult internet users in 2013 and in 2014 who say they ever undertake each online activity, with this overall measure also broken out into weekly use and use less frequently than weekly.

Nearly all internet users (97%) say they have ever gone online for general surfing or browsing, with close to nine in ten (86%) saying they do this at least weekly. Around eight in ten have ever gone online to find information for leisure time (83%), looked for information online about health related issues (78%) and looked at news websites or apps (76%). However, unlike general browsing, these figures are much lower at a weekly level – News has the highest weekly figure of the three types of information at 42%, followed by leisure (30%) and health (16%).

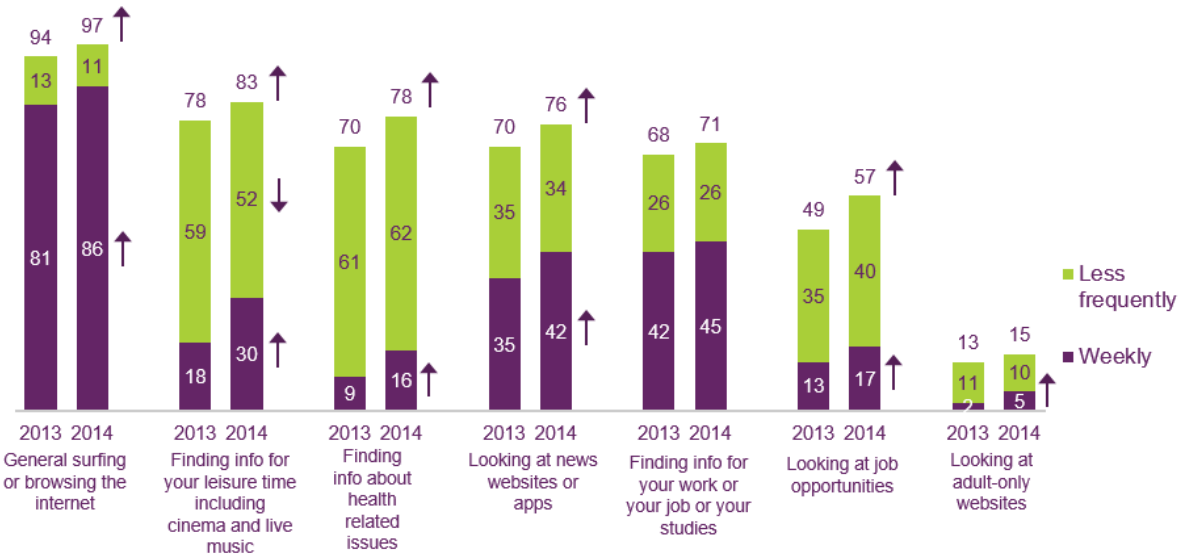
A majority of internet users have ever gone online to find information for work/ job/ studies (71%), with 45% doing this at least weekly. More than half have ever looked at job opportunities online (57%), but considerably fewer do so at least weekly (17%).

A minority cite using adult-only[42] websites (15%), with less than one in ten (5%) saying they do so weekly.

Compared to 2013, six of the activities shown in Figure 95 are more likely to have been undertaken online both ever and weekly. The only exception is finding information for work or studies.

[42] This activity is likely to be under-claimed by respondents due to its nature.

Figure 95: Browsing/ searching for information: 2013 vs. 2014



IN15/ IN16 From this list please tell me the types of things you currently do online and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 1609 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

Figure 96 shows the weekly incidence of undertaking each of these seven activities by age, and in terms of significant differences from the average:

- 16-24 year old internet users are more likely to cite five of the seven activities. The only one where this isn't the case is *looking at news websites or apps.*

- Those aged 25-34 are more likely to cite three of the seven activities. Health (22%) was an area that was almost twice as high as among 16-24s (12%), whereas the other two (general surfing at 93% and job hunting 24%) were at similar levels to that age group.

- 35-44s are more likely than average to go online at least weekly to find information for work/ job/ studies (56% vs. 45%).

- In contrast, 55-64s are less likely to go online to find information for work/ job/ (36%), and this is also the case for leisure time information (21% vs. 30%).

- 65-74s are less likely to go online at least weekly to do six out of the seven activities and are as likely as all internet users to go online at least weekly to look at news websites/ apps.

- Those aged 75+ are less likely to go online at least weekly for all seven activities.

Figure 96: Browsing/ searching for information at least weekly, by age

	All internet users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	1609	240	277	319	265	228	150	130
General surfing/ browsing the internet	86%	93% ↑	93% ↑	90%	84%	81%	65% ↓	66% ↓
Finding information for your work or your job or your studies	45%	57% ↑	50%	56% ↑	43%	36% ↓	12% ↓	6% ↓
Looking at news websites or apps	42%	42%	47%	45%	38%	37%	39%	29% ↓
Finding information for your leisure time including cinema and live music	30%	45% ↑	35%	35%	26%	21% ↓	15% ↓	11% ↓
Looking at job opportunities	17%	30% ↑	24% ↑	17%	14%	12%	1% ↓	0% ↓
Finding information about health related issues	16%	12%	22% ↑	18%	11%	17%	9% ↓	10% ↓
Looking at adult-only websites	5%	8% ↑	6%	6%	4%	2%	0% ↓	0% ↓

IN15/ IN16 –From this list please tell me the types of things you currently do online and how often you do each? (Prompted responses, single coded)
Arrows show significant differences (95% level) for age compared to all internet users

There are four activities where ABs show higher proportions than DEs: finding information for work/ job/ studies (62% vs. 24%), finding information for leisure time (43% vs. 19%), looking at news websites or apps (54% vs. 27%), and general surfing/ browsing (90% vs. 81%). However, adults in DE households are more likely than all users to cite looking for job opportunities (24% vs. 17%).

Men are more likely than women to say they go online at least weekly for three activities: to find information for work/ job/ studies (50% vs. 40%), to look at news websites/ apps (47% vs. 37%) and to look at adult-only websites (8% vs. 2%).

Figure 97: Browsing/ searching for information at least weekly, by socio-economic group and gender

	All internet users	AB	C1	C2	DE	Male	Female
Base	1609	404	497	314	394	791	818
General surfing/ browsing the internet	86%	90% ↑	85%	88%	81% ↓	86%	85%
Finding information for your work or your job or your studies	45%	62% ↑	50%	35% ↓	24% ↓	50% ↑	40%
Looking at news websites or apps	42%	54% ↑	43%	37%	27% ↓	47% ↑	37%
Finding information for your leisure time including cinema and live music	30%	43% ↑	32%	24% ↓	19% ↓	33%	28%
Looking at job opportunities	17%	17%	12% ↓	17%	24% ↑	19%	15%
Finding information about health related issues	16%	18%	17%	12%	13%	14%	17%
Looking at adult-only websites	5%	6%	5%	5%	3%	8% ↑	2%

IN15/ IN16 –From this list please tell me the types of things you currently do online and how often you do each?
Arrows show significant differences (95% level) for socio-economic group compared to all internet users, and males compared to females..

Device mostly used for general surfing/ browsing the internet

For general browsing, younger internet users are more inclined to using a smartphone, while older users use a desktop computer more regularly.

In the previous section of this report we showed how preferences for using internet-enabled devices varied by the online activity being conducted.

As shown in Figure 98, four in ten (42%) internet users who ever go online to surf or browse the internet say they mostly use a laptop or netbook for this activity, and this is less likely for 16-24s.

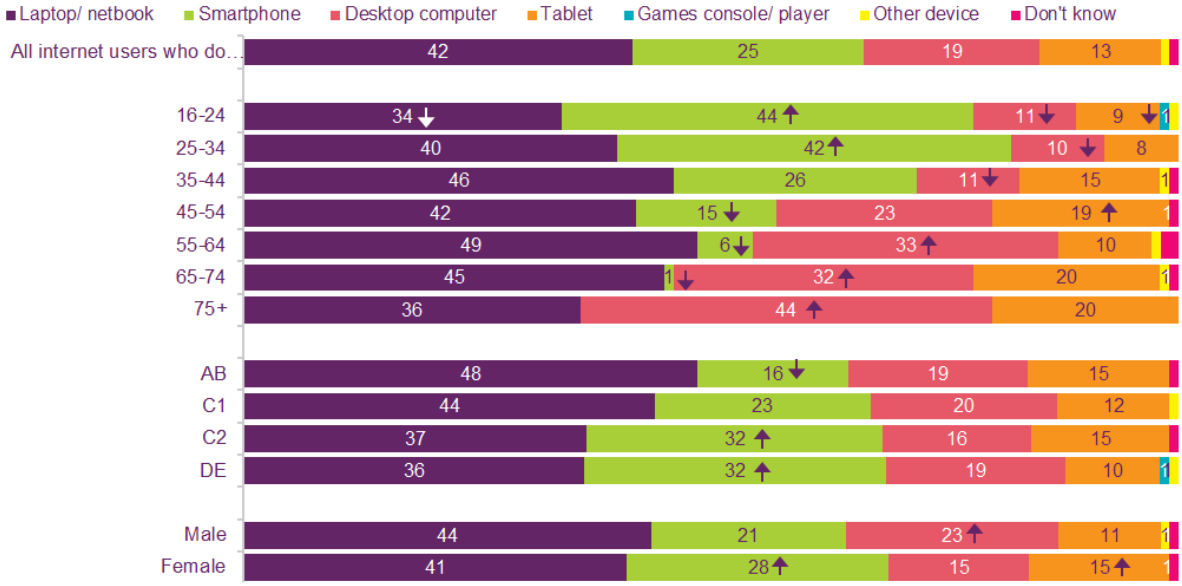
One in four internet users (25%) say they mostly use a smartphone for this purpose, with this being more likely for 16-24s (44%), 25-34s (42%), C2s (32%) and DEs (32%). In contrast, those over the age of 45 are less likely (ranging from zero 75+ year olds to 15% of 45-54s).

Those in AB households are also less likely (16% vs. 25%).One in five adults who surf or browse the internet mostly use a desktop computer for this purpose (19%). Respondents aged 55 or over are more likely to say this (rising to 44% of 75+ year olds). This compares to 1 in 10 for age groups under the age of 45.

While around one in eight mostly use a tablet for going online to surf or browse the internet (13%), this is more likely for 45-54s (19%) and less likely for 25-34s (8%).

There are some differences by gender. Women are more likely than men to mostly use a smartphone (28% vs. 21%) or tablet (15% vs. 11%) for general surfing/ browsing, while men are more likely to mostly use a desktop computer (23% vs. 15%).

Figure 98: Device mostly used for surfing/ browsing the internet, by demographic group



IN18F. Which one of these devices do you use most for surfing or browsing the internet?
Base: Adults aged 16+ who go online at home or elsewhere who ever surf/ browse the internet (1541 aged 16+, varies by demographic) .
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Device mostly used for looking at news websites or apps

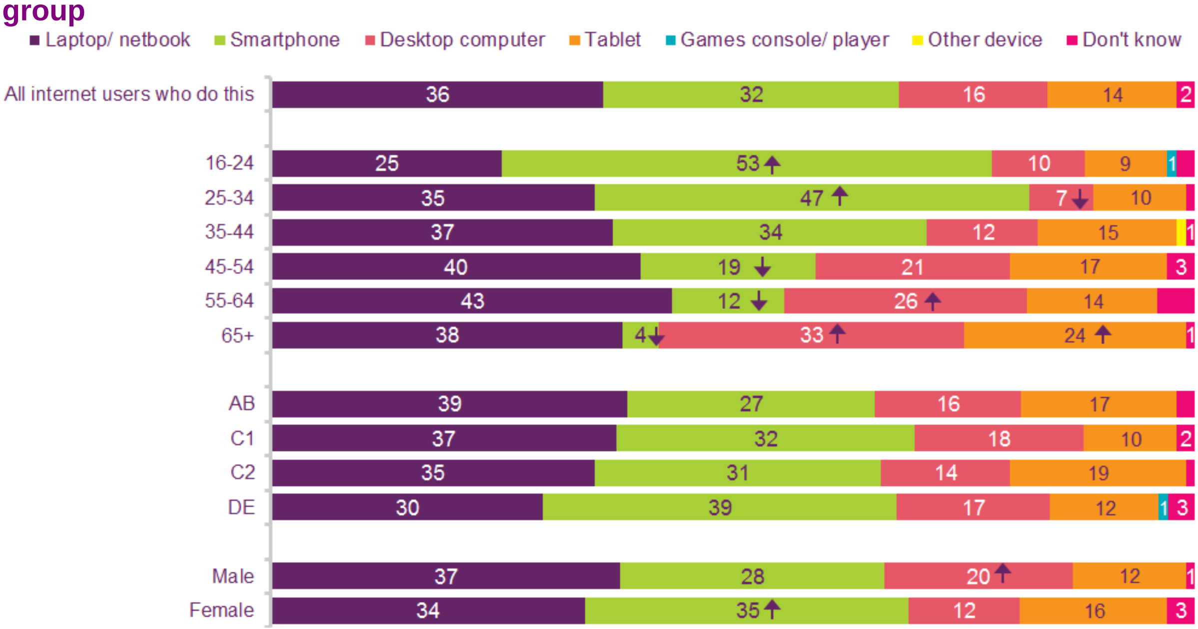
Devices mostly used for news websites or apps are reflective of the figures for general browsing. However, those aged 65+ are more inclined to use tablets than younger age groups.

As shown in Figure 99, when asked which device they mostly use for looking at news websites or apps, a similar proportion cite using a laptop or netbook (36%) as do a smartphone (32%); 16% mostly use a desktop computer, while 14% mostly use a tablet.

There are differences by age; 16-24s (53%) and 25-34s (47%) are more likely to say they mostly use a smartphone (32% for all), while those aged 45+ are less likely to say they mostly use this device for this purpose (19% of 45-54s being the highest of the older age groups). Adults aged 55 or over are more likely than all to say they mostly use a desktop computer (26% for 55-64s and 33% for 65+). Adults aged 65+ are also more likely to say they mostly use a tablet for looking at news websites or apps (24% vs. 14%).

Men who look at news websites or apps are more likely than women to say they mostly use a desktop computer for this purpose (20% vs. 12%) and women are more likely to say they mostly use a smartphone (35% vs. 28%).

Figure 99: Device mostly used for looking at news websites/apps, by demographic group



IN18G. Which one of these devices do you use most for looking at news websites or apps?
Base: All adult internet users aged 16+ who ever look at news websites or apps (1171 aged 16+, varies by demographic). Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

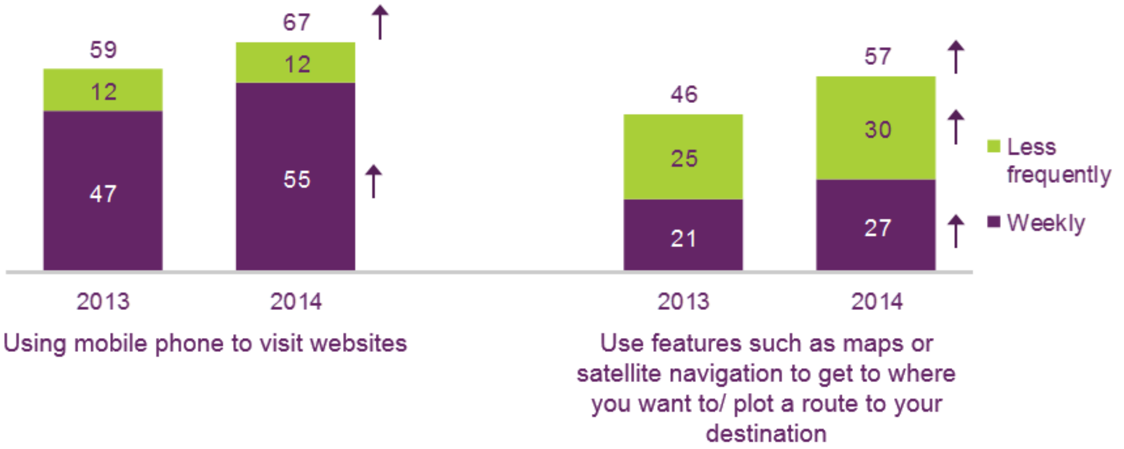
Browsing or searching for content on a mobile phone

Use of mobile phones to visit websites has increased since 2013, with a majority now doing it weekly.

Mobile phone users (89% of all adults) were also asked specifically about browsing or searching for content on their mobile. Figure 100 shows that in 2014, two in three have ever used their mobile phone to visit websites (67%) with more than half doing so at least weekly (55%). Since 2013, mobile users are more likely to have ever done it (67% vs. 59% in 2013), and to have done it at least weekly (55% vs. 47%).

In 2014, a majority (57%) of mobile phone users have ever used features on their phone such as maps or satellite navigation to get to where they want to go or plot a route to a destination. This is more likely compared to 2013 (57% vs. 46%). More than one in four (27%) make this use of their phone at least weekly, which is also more likely compared to 2013 (27% vs. 21%).

Figure 100: Use of a mobile phone for browsing/ searching for content: 2013 vs. 2014



M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1465 in 2013, 1670 in 2014) Arrows show significant changes (99% level) between 2013 and 2014

Figure 101 shows any variation in the weekly incidence of using a mobile phone to undertake either of these two activities by age, socio-economic group and by gender.

Compared to all mobile users, those aged 16-24, 25-34 and 35-44 and in AB socio-economic group are more likely to use their phone at least weekly for both these activities, while those aged 55-64, 65-74 and 75+ and DEs are less likely to.

Men are more likely than women to say they use features such as maps or satellite navigation on their mobile phone at least weekly (32% vs. 22%).

Figure 101: Use of a mobile phone at least weekly for browsing/ searching for content, by demographic group

	All mobile users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1670**	**244**	**281**	**321**	**270**	**243**	**167**	**144**
Using mobile phone to visit websites	55%	74% ↑	76% ↑	71% ↑	52%	26% ↓	12% ↓	2% ↓
Use features such as maps or satellite navigation to get to where you want to/ plot a route to your destination	27%	38% ↑	37% ↑	35% ↑	26%	12% ↓	5% ↓	0% ↓

	All mobile users	AB	C1	C2	DE	Male	Female
Base	**1670**	**399**	**492**	**337**	**442**	**808**	**862**
Using mobile phone to visit websites	55%	61% ↑	59%	52%	45% ↓	55%	54%
Use features such as maps or satellite navigation to get to where you want to/ plot a route to your destination	27%	36% ↑	28%	24%	18% ↓	32% ↑	22%

M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Arrows show significant differences (95% level) for socio-economic group compared to all internet users, and males compared to females.

5.8 Transacting

Frequency of using transactional services online

In 2014 one in four internet users say they purchase online at least weekly, and this is unchanged since 2013

Out of the thirty two individual online activities that internet users were asked about, three activities relate specifically to using transactional service online. These are:

- Buying things online
- Selling things online
- Banking and paying bills online

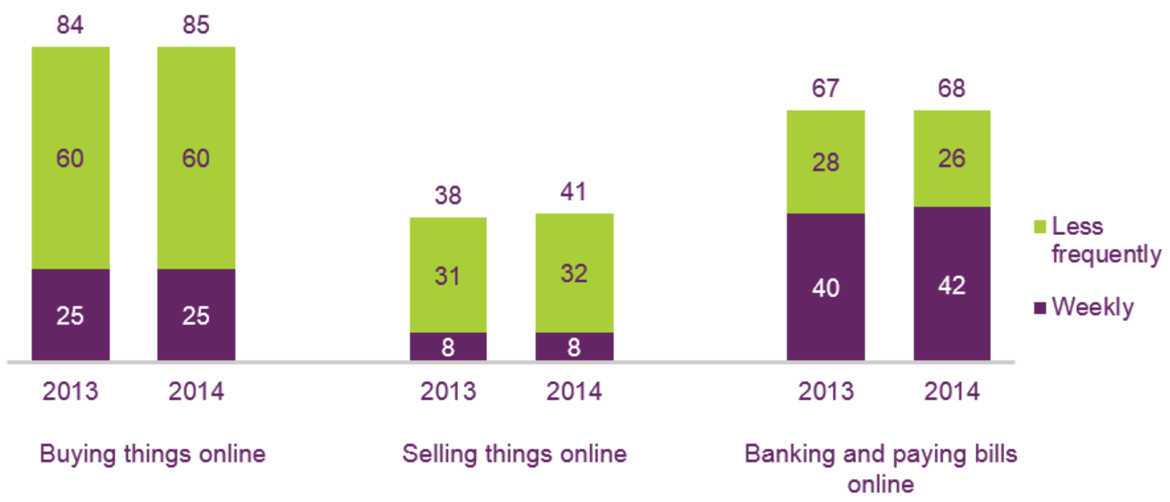
Figure 102 shows the proportion of adult internet users in 2013 and in 2014 who say they ever undertake each online activity, with this overall measure also broken out into weekly use and use less frequently than weekly.

Unlike some of the earlier categories of online use discussed in this section, there has been no change since 2013 in the incidence of ever having conducted any of these activities online, or in conducting them at least weekly.

Nearly nine in ten adult internet users (85%) say they have ever bought things online. A minority of these say they buy things online at least weekly, accounting for a quarter of internet users (25%). Around half the number who say have ever bought things online have sold things online (41%) with fewer than one in ten saying they do this at least weekly (8%).

Seven in ten internet users (68%) say they have ever gone online to bank or pays bills, with more than four in ten (42%) saying they do this at least weekly.

Figure 102: Using transactional services online, by activity type: 2013 vs. 2014



IN15/ IN16 –From this list please tell me the types of things you currently do online and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 1609 in 2014)

As shown in Figure 103 all three activities are lower among those aged 65+. In contrast, those aged 25-34 are the most likely to bank and pay bills online (49%), and to buy things online (34%) at least weekly. 16-24s are also less likely than average to do the former (34%). ABs (51%) are much more likely than DEs (29%) to bank and pay bills online

Figure 103: Weekly use of transactional services online, by demographic group

	All internet users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1609**	**240**	**277**	**319**	**265**	**228**	**150**	**130**
Banking and paying bills online	42%	34% ↓	49% ↑	52% ↑	43%	38%	24% ↓	20% ↓
Buying things online	25%	22%	34% ↑	30%	22%	19%	15% ↓	9% ↓
Selling things online	8%	7%	12%	12%	6%	8%	2% ↓	1% ↓

	All internet users	AB	C1	C2	DE	Male	Female
Base	**1609**	**404**	**497**	**314**	**394**	**791**	**818**
Banking and paying bills online	42%	51% ↑	46%	37%	29% ↓	42%	42%
Buying things online	25%	30%	22%	26%	21%	27%	23%
Selling things online	8%	11%	9%	6%	6%	9%	8%

IN15/ IN16 From this list please tell me the types of things you currently do online and how often you do each? Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Device mostly used for buying things or banking online

While the laptop is still the main device for banking, smartphones are increasingly being used for this purpose as well as shopping

In the previous section of this report we showed how preferences for using internet-enabled devices varied by the online activity being conducted. Figure 104 and Figure 105 shows how device use varies by age, socio-economic group and gender for each of the two activities.

Half of adults (50%) say the device they mostly use to buy things online is a laptop. This doesn't vary by age, but it is less likely among those in DE households (42% vs. 50% for all).

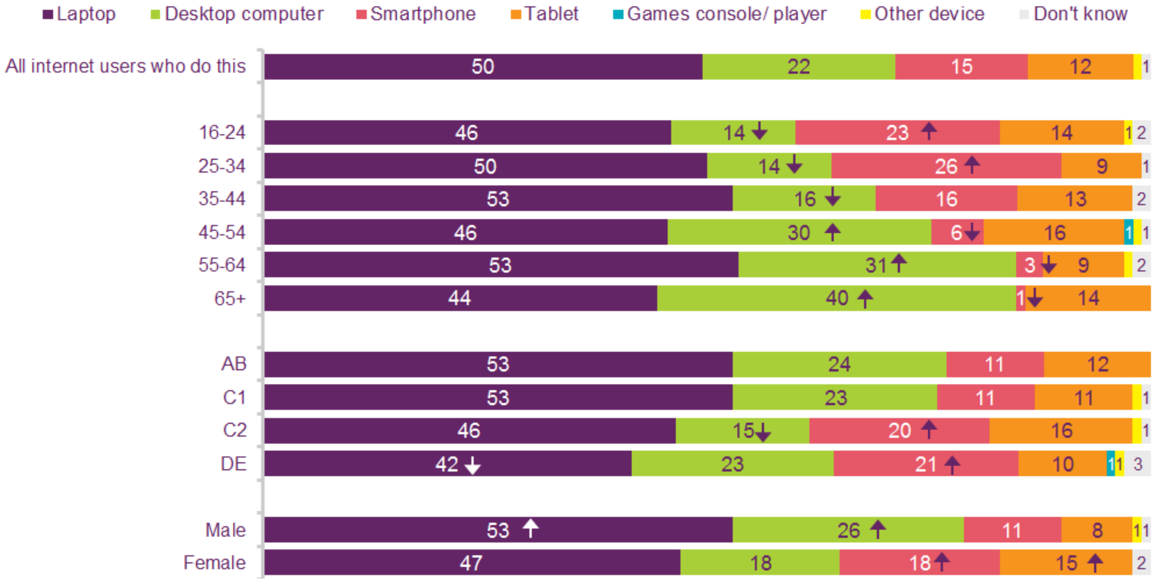
More than one in five internet users say they mostly use a desktop computer to buy things online (22%) with clear differences by age. Those aged between 16 and 44 are less likely than average (14-16% vs. 22%), while those aged 45 and over are more likely (30-40%). C2s are less likely to say this type of device also (15%).

Around one in seven adults (15%) say they mostly use a smartphone to buy things online, with this being more likely for 16-24s (23%) and 25-34s (26%) and less likely among 45-54s (6%), 55-64s (3%) and 65+ (1%). Those in C2 and DE households are also more likely to say they mostly use a smartphone compared to all (20% for C2s and 21% for DEs vs. 15%).

One in eight adults (12%) who go online to make purchases say they mostly use a tablet, and this incidence does not vary by age or socio-economic group. There are differences between men and women.

Men are more likely than women to mostly use a laptop (53% vs. 47%) and a desktop computer (26% vs. 18%). Women are more likely than men to mostly use a smartphone (18% vs. 11%), and a tablet (15% vs. 8%).

Figure 104: Device mostly used for buying things online, by demographic group



IN18A. Please take a look at this list of devices that can be used to go online. Which one of these devices do you use most for buying things online?
Base: All adult s aged 16+ who go online at home or elsewhere and who ever buy things online (1321 aged 16+, varies by demographic). Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

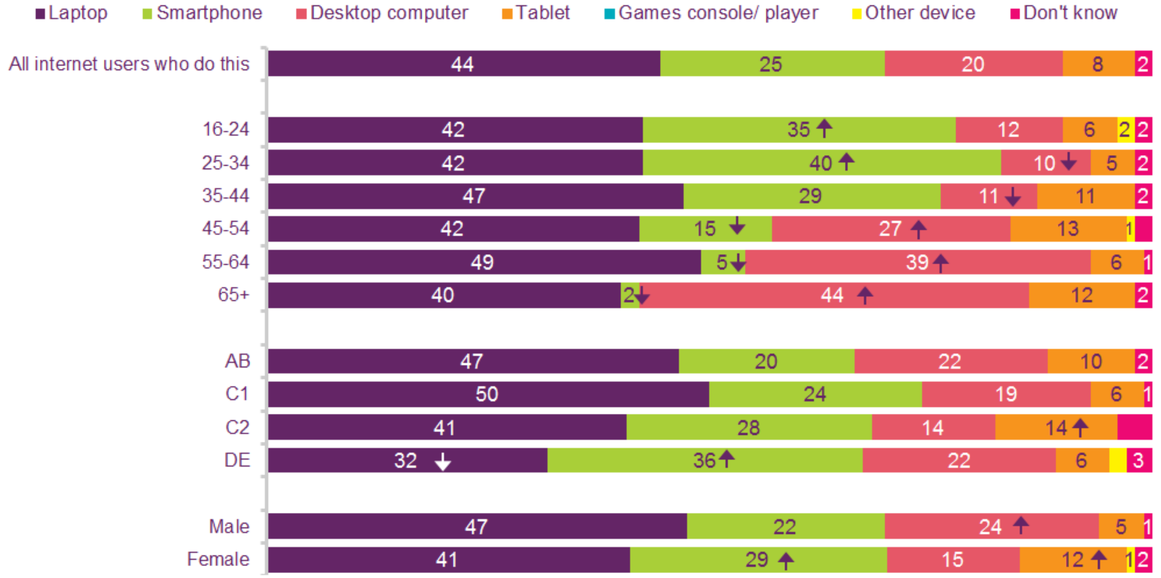
Among all internet users who have ever banked or paid bills online, 44% say they mostly use a laptop for this, with a quarter (25%) mostly using a smartphone and one in five (20%) a desktop computer. Eight per cent say they mostly use a tablet.

There are variations by age - banking online is more likely on a smartphone among 16-24s (35%) and 25-34s (40%), and for these two age groups these proportions are close to laptop (42% for both). For all age groups between aged 35 and 64, the laptop is the most popularly cited device, but as age increases the desktop becomes more prominent. Among those aged 65+ the desktop (44%) surpasses the laptop (40%).

There are only three differences by household socio-economic group. Compared to all who have ever banked or paid bills online, adults in DE households are less likely to say they mostly use a laptop to bank online (32% vs. 44%), and are more likely to say they mostly use a smartphone (36% vs. 25%). Those in C2 households are more likely to cite a tablet (14% vs. 8%).

There are also differences by gender - men are more likely than women to cite mostly using a desktop computer for banking online (24% vs. 15%). Women are more likely than men to cite a smartphone (29% vs. 22%) and a tablet (12% vs. 5%).

Figure 105: Device mostly used for banking online, by demographic group



IN18B. Which one of these devices do you use most for banking online?
Base: All adult s aged 16+ who ever bank or pay bills online (1017 aged 16+, varies by demographic). Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

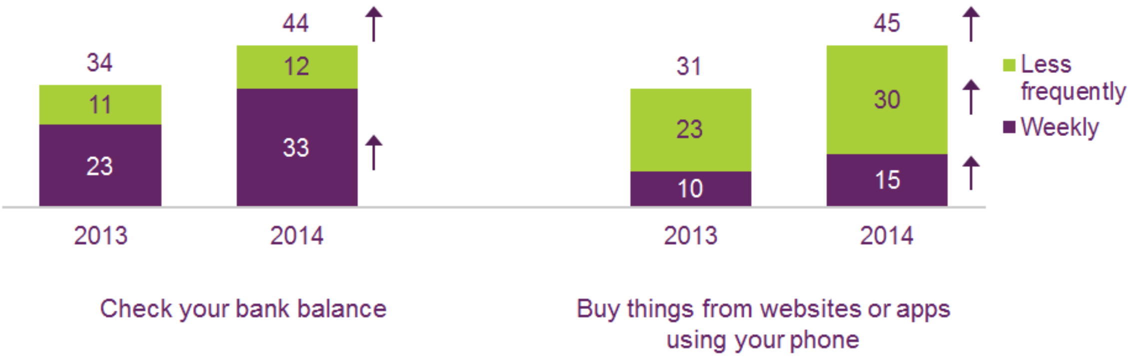
Transactional activities on a mobile phone

Mobile phone users were asked specifically about their use of a mobile phone for two activities – to *check your bank balance* and to *buy things from websites or apps*.

Figure 106 shows that more than four in ten mobile phone users have ever used their mobile phone to check their bank balance (44%) with one in three doing so at least weekly (33%). A similar proportion to this have also ever used their mobile phone to buy things (45%), though considerably fewer say they do so at least weekly (15%).

Compared to 2013, mobile users are more likely to have ever used their phone to check their bank balance (44% vs. 34% in 2013) or to have bought things from websites using their phone (45% vs. 31% ion 2013). They are also more likely to say they have undertaken both these activities at least weekly compared to 2013 (33% vs. 23% for checking a bank balance and 15% vs. 10% for buy things from websites or apps).

Figure 106: Use of a mobile phone for transactional activities: 2013 vs. 2014



M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1465 in 2013, 1670 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

Figure 107 shows any variation in the weekly incidence of using a mobile phone to undertake either of these activities by age, socio-economic group and by gender in 2014.

Compared to all mobile users (33%) those aged 16-24 (42%) and 25-34 (52%) are more likely to use their phone at least weekly check their bank balance, while it is less likely among those aged 55-64s (13%), 65-74s (3%) 75+ (3%) and DEs (24%).

In the case of buying things it is more likely among those under the age of 45 (20-22%), and less likely among those over the age of 54 (0-2%)

Figure 107: Use of a mobile phone at least weekly for transactional activities, by demographic group

	All mobile users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1670**	**244**	**281**	**321**	**270**	**243**	**167**	**144**
Check your bank balance	33%	42% ↑	52% ↑	39%	32%	13% ↓	3% ↓	3% ↓
Buy things from websites or apps using your phone	15%	22% ↑	24% ↑	20% ↑	11%	2% ↓	2% ↓	0% ↓

	All mobile users	AB	C1	C2	DE	Male	Female
Base	**1670**	**399**	**492**	**337**	**442**	**808**	**862**
Check your bank balance	33%	36%	37%	33%	24% ↓	33%	32%
Buy things from websites or apps using your phone	15%	17%	13%	15%	14%	17%	13%

M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each? Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

5.9 Accessing public or civic services

Frequency of using public or civic services online

Internet users are more likely than in 2013 to have ever gone online for all public/ civic activities, and a higher proportion have completed government processes in the last three months

Out of the thirty two individual online activities that internet users were asked about six activities that can be grouped under the heading of public or civic services. These are:

1. Find information about public services provided by local or national government
2. Complete government processes online – such as register for tax credits, renew driving licence, car tax or passport, complete tax return
3. Look at websites/ apps for news about or events in the local area/ the local community
4. Look at political/ campaign/ issues websites
5. Sign an online petition
6. Contact a local councillor or your MP online

Figure 108 shows the proportion of adult internet users (2013 and 2014) who say they ever undertake each online activity, with this overall measure also broken out into weekly, quarterly (at least every three months), and less frequent use.

Three of the six public or civic activities have ever been undertaken by a majority of internet users: *finding information about public services provided by local or national government* (78%), *looking at websites/ apps for news about or events in the local area/ the local community* (69%) and *completing government processes online* (69%).

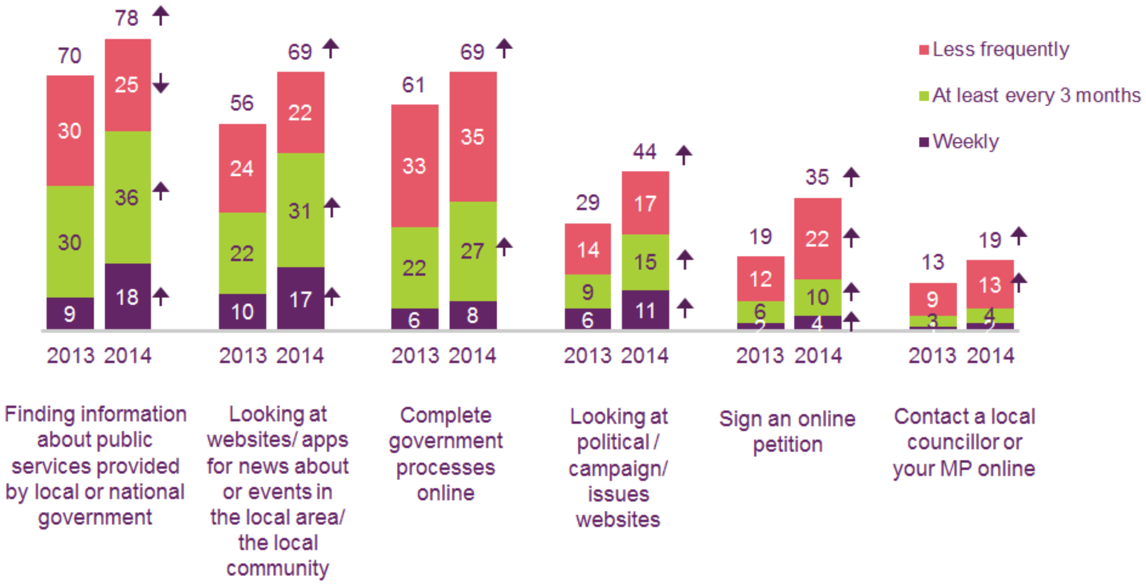
More than four in ten internet users say they have ever looked at political/ campaign/ issues websites (44%) while around one in three (35%) have ever signed an online petition. One in five (19%) say they have ever contacted a local councillor or their MP online.

On a weekly basis, slightly fewer than one in five internet users say they find out information about public services provided by local or national government (18%) look at websites or apps for news about local area or community (17%). The remaining activities are done by one in ten or fewer.

Compared to 2013, internet users are more likely to say they have ever undertaken all of the six activities asked, with 'quarterly' use more likely for five out of the six activities. The exception to this is contacting a local MP or councillor (6% vs. 4% in 2013). The activity that has risen by the highest number of percentage points (16) is *looking at websites/ apps for news about or events in the local area/ the local community* (48% vs. 32%)

Four of these activities are also more likely to be undertaken at least weekly, compared to 2013: *finding information about public services provided by local or national government* (18% vs. 9% in 2013), *looking at websites/ apps for news about or events in the local area/ the local community* (17% vs. 10%), *looking at political/ campaign/ issues/ websites* (11% vs. 6%) and *signing an online petition* (4% vs. 2%).

Figure 108: Using public or civic services online, by activity type: 2013 vs. 2014



IN15/ 16 –From this list please tell me the types of things you currently do online and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 1609 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

Figure 109 shows any variation in the incidence of ever[43] undertaking each of these six public or civic activities online by age, while Figure 110 shows any variation by socio-economic group and by gender in 2014.

Compared to all internet users, those aged 35-44 are more likely to have ever undertaken four of the six activities: finding information about public services provided by local or national government (88% vs. 78%), looking at websites/ apps for news about or events in the local area/ the local community (77% vs. 69%), completing government processes online (80% vs. 69%) and, looking at political/ campaign/ issues websites (51% vs. 44%). Users aged 25-34 are also more likely to have ever completed government processes online (77% vs. 69%).

In contrast, users aged 16-24 are less likely to have ever gone online to find out information about public services provided by local or national government (69% vs. 78%), to complete government processes online (51% vs. 69%) or to contact a local councillor or MP online (12% vs. 19%). Those aged 55-64 are also less likely to have ever gone online to find out information about public services provided by local or national government (70% vs. 78%).

There are four areas that both 65-74s and 75+ are less likely to have ever visited online: local community websites (59% and 51%), government processes (58% and 45%) political/ campaign websites (27% and 29%) and online petitions (27% and 13%). Those aged 75+ are also less likely to have ever gone online to find information about public services (58%).

[43] Previous charts in this section have always shown comparisons based on weekly use – however for public/ civic activities it would be more appropriate to draw comparisons based on ever having undertaken the activity as some activities may not be required to be undertaken at least weekly or even quarterly

Figure 109: Use of public or civic services online, by age

	All internet users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	1609	240	277	319	265	228	150	130
Finding information about public services provided by local or national government	78%	69% ↓	83%	88% ↑	81%	70% ↓	71%	58% ↓
Looking at websites/ apps for news about or events in the local area/ the local community	69%	63%	73%	77% ↑	73%	66%	59% ↓	51% ↓
Complete government processes online	69%	51% ↓	77% ↑	80% ↑	70%	66%	58% ↓	45% ↓
Looking at political / campaign/ issues websites	44%	40%	50%	51% ↑	44%	36%	27% ↓	29% ↓
Sign an online petition	35%	35%	42%	40%	34%	30%	27% ↓	13% ↓
Contact a local councillor or your MP online	19%	12% ↓	15%	23%	19%	21%	21%	15%

IN15/ IN16 –From this list please tell me the types of things you currently do online and how often you do each? Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females..

Adults in AB households are more likely than average to have cited all six public or civic activities. Those in C1 households are also more likely to have ever completed government processes online (74% vs. 69%). Adults in C2 households are less likely to say they have ever undertaken all six public or civic activities, while those in DE households are less likely to have undertaken five of the six activities (contacting a local councillor or MP is the only exception at 14%).

Men are more likely than women to say they have ever completed government processes online (73% vs. 65%), looked at political/ campaign/ issues websites (51% vs. 37%) and to have ever contacted a local councillor or MP online (23% vs. 15%).

Figure 110: Use of public or civic services online, by socio-economic group

	All internet users	AB	C1	C2	DE	Male	Female
Base	1609	404	497	314	394	791	818
Finding information about public services provided by local or national government	78%	90% ↑	80%	71% ↓	67% ↓	79%	77%
Looking at websites/ apps for news about or events in the local area/ the local community	69%	84% ↑	71%	61% ↓	57% ↓	70%	69%
Complete government processes online	69%	84% ↑	74% ↑	59% ↓	51% ↓	73% ↑	65%
Looking at political / campaign/ issues websites	44%	58% ↑	49%	31% ↓	28% ↓	51% ↑	37%
Sign an online petition	35%	48% ↑	38%	27% ↓	24% ↓	37%	34%
Contact a local councillor or your MP online	19%	31% ↑	15%	11% ↓	14%	23% ↑	15%

IN15/ IN16 –From this list please tell me the types of things you currently do online and how often you do each? Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Device mostly used for completing government processes online

Computers are mostly used for completing government processes online

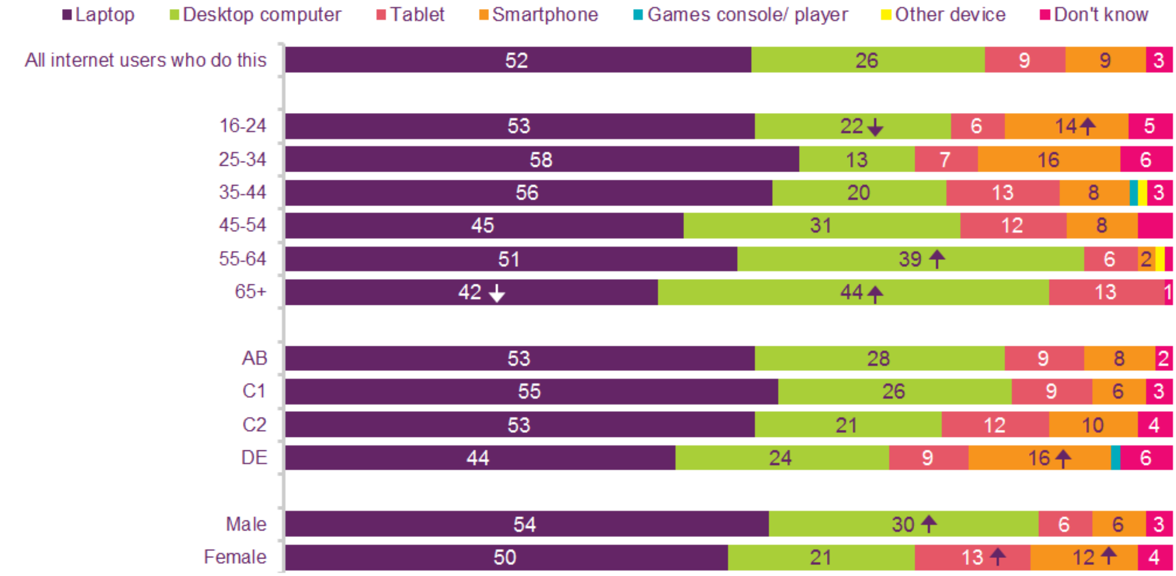
Figure 111 shows how device usage for completing government processes online varies by age, socio-economic and gender.

Half (52%) of all internet users who ever go online to complete government processes say they mostly use a laptop for this purpose, with one in four (26%) mostly using a desktop computer. One in ten (9%) say they mostly use a tablet or smartphone (9%).Laptop was the highest cited device cited for all age groups except for those aged 65+, where desktop was around the same proportion (44% vs. 42%). Those aged 25-34 were less likely to cite desktop computer (13% vs. 26% for all) and more likely to use a smartphone (16% vs. 9%).

Compared to all, adults in DE households who go online to complete government processes are more likely to say they mostly use a smartphone for this activity (16% vs. 9%).

Men are more likely than women to say they mostly use a desktop computer to complete this activity online (30% vs. 21%) while women are more likely to say they mostly use a tablet (13% vs. 6%) or a smartphone (12% vs. 6%).

Figure 111: Device mostly used for completing government processes, by demographic group



IN18E. Which one of these devices do you use most for completing government processes?
Base: All adult s aged 16+ who go online at home or elsewhere and who complete government processes online (1022 aged 16+, varies by demographic).
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Reasons for not completing government processes online

One in three who have never completed government processes online say it is because they prefer to speak to someone about these things

Internet users who had never completed any government processes online (such a register for tax credits, renew a driving licence, car tax or passport or complete a tax return, accounting for 31% of all internet users) were prompted with nine possible reasons[44] for not doing this online and were asked to say which applied to them.

As shown in Figure 112 around one in four (24%) say they don't complete any government processes online because they prefer to fill out a form or use the post. A similar proportion of adults (22%) say it is because they don't need to complete these government processes, or say it is because they prefer to talk with someone in person (22%). Around one in six would prefer to complete these types of processes by phone (16%), while one in ten (11%) do not consider it safe to give their information online. All other responses are given by fewer than one in ten.

Overall, a third of (32%) internet users who don't complete government processes online say it is because they prefer some kind of verbal contact – either by phone, or through talking to someone in person or through believing they cannot be done online.

Figure 112: Reasons for not completing government processes online

IN17. You said earlier that you don't go online to complete government processes such as register for tax credits, renew a driving licence, car tax or a passport or to complete a tax return. Which of these are reasons why you don't do this online?
Base: Adult internet users aged 16+ who have never completed government processes online (587)

[44] As well as an option for stating some other reason or reasons

5.10 Other activities

From all the individual activities (both online via any device, and specifically via a mobile phone) that respondents are asked about, there are a number of activities that have not been reported so far, and these are covered in this section:

1. Doing an online course to achieve a qualification
2. Filling in online forms and applications
3. Maintaining a website/blog
4. Downloading software or apps (including games)
5. Taking photos and videos (on a mobile phone)

Filling in online forms and applications

As shown in Figure 113, seven in ten internet users have ever filled in a form or application online (70%), and this is higher than in 2013 (61%). Only 13% have done it at least weekly, but again this is an increase from 2013 (8%).

Compared to all internet users, those aged 25-34 are more likely to say they fill in forms or applications online at least weekly (19% vs. 13%).

Maintaining a website/ blog

Around one in four (27%) internet users say they have ever set up or maintained a website or blog (with fewer than one in ten (8%) saying they do this at least weekly. Neither of these figures have changed to a statistically significant level since 2013[45].

Those in AB households are more likely to say they set up or maintaining a website or blog than all internet users (16% vs. 8%), as are males (11%).

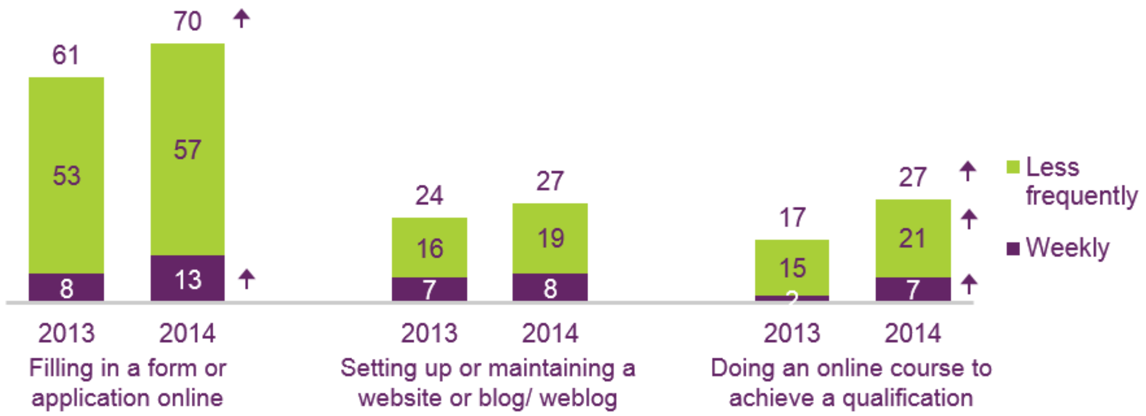
Doing an online course to achieve a qualification

A minority of internet users have ever gone online to do an online course (27%) with fewer than one in ten (7%) doing this at least weekly. Both these measures have increased since 2013 from 17% and 2% respectively.

Adults aged 25-34 (12%) are more likely to say they have done an online course to achieve a qualification at least weekly with those aged 55+ less likely. C2 adults are also less likely (2%).

[45] In 2013 respondents were asked about maintaining a website, blog or weblog and this was amended to setting up or maintaining a website, blog or weblog in 2014

Figure 113: Undertaking other digital activities online, by activity type: 2013 vs. 2014



IN15/ IN16: From this list please tell me the types of things you currently do online and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1272 in 2013, 1609 in 2014).
Arrows show significant changes (99% level) between 2013 and 2014

Figure 114: Online applications, website/blogs, and courses, weekly incidence by demographic group

	All internet users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1609**	**240**	**277**	**319**	**265**	**228**	**150**	**130**
Filling in a form or application online	13%	18%	19% ↑	12%	12%	10%	2% ↓	0% ↓
Setting up or maintaining a website or blog/ weblog	8%	9%	11%	11%	7%	7%	1% ↓	1% ↓
Doing an online course to achieve a qualification	7%	9%	12% ↑	7%	4%	3% ↓	3% ↓	1% ↓

	All internet users	AB	C1	C2	DE	Male	Female
Base	**1609**	**404**	**497**	**314**	**394**	**791**	**818**
Filling in a form or application online	13%	17%	13%	10%	10%	16% ↑	11%
Setting up or maintaining a website or blog/ weblog	8%	16% ↑	7%	3% ↓	5% ↓	11% ↑	5%
Doing an online course to achieve a qualification	7%	9%	9%	2% ↓	6%	6%	7%

IN15/ IN16 From this list please tell me the types of things you currently do online and how often you do each?
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Downloading software or apps (including games)

Downloading software online via any device:

A majority of internet users (60%) say they have ever downloaded software, although relatively few (14%) say they do this at least weekly. Despite this the latter has increased since 2013 (10%).

Compared to all internet users, those aged 25-34 are more likely to say they download software (20% vs. 14%). Internet users aged 55+ are less likely than average, ranging from zero 75+ year olds to 7% of 55-64s.

Those in AB households are more likely than average to download software at least once a week (19% vs. 14%)

Downloading apps (including games) on a mobile phone:

Six in ten (58%) mobile phone users have ever downloaded apps (including games) on their mobile phone, and this has increased since 2013 (48%). Despite this it has remained unchanged on a weekly basis (21%), meaning it is the less frequent use that has increased (from 27% to 37%).

Those aged 16-24 are the most likely to say they download apps on their mobile phone at least once a week (42%), followed by 25-34s (34%), and both of these age groups are more inclined than the average

Males (26%) are more likely than females (18%) to do this activity on a weekly basis.

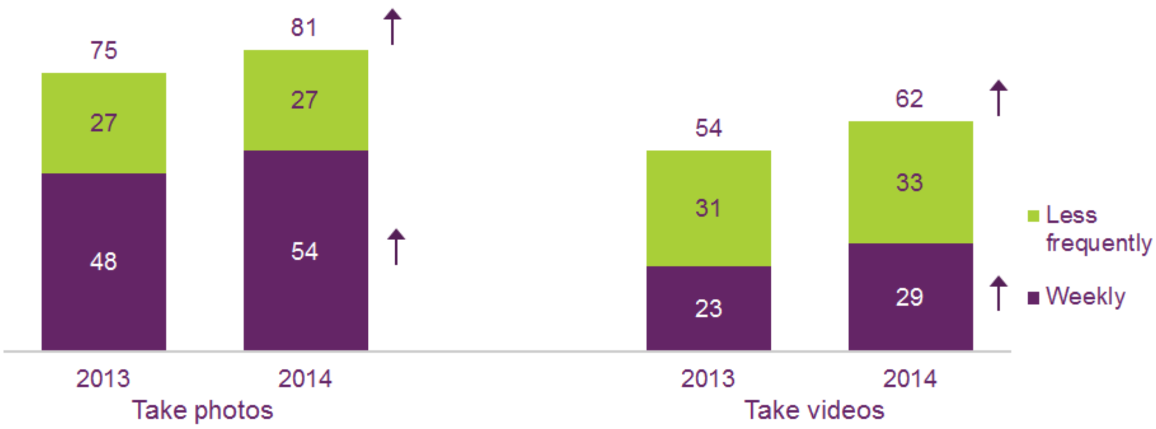
<u>Taking photos and videos on a mobile phone</u>

Mobile phone users are more likely to use their phone for taking photos or videos compared to 2013

Eight in ten mobile phone users (81%) have ever used their mobile phone for taking photos with a majority also doing this at least weekly (54%). This has increased since 2013 (48%).

Taking videos has also increased, with 29% of mobile users doing so at least once a week compared to 23% in 2013. Six in ten ever do this (62%).

Figure 115: Use of a mobile phone for taking photos and videos: 2013 vs. 2014



M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Base: All adults aged 16+ who use a mobile phone (1465 in 2013, 1670 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

Figure 116 shows that there is a clear distinction by age for using a mobile phone at least weekly for taking photos and taking videos, decreasing by age group. For both activities adults aged under the age of 45 are more likely to have done them at least once a week than those above this age. Photos ranges from 4% of 75+ year olds to 79% of 16-24s, while videos ranges from 1% to 47% among the same age groups.

There are no differences by socio-economic group. Women are more likely than men to use their phone at least weekly to take photos (56% vs. 51%).

Figure 116: Weekly use of a mobile phone for photos and videos, by demographic group

	All mobile users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1670**	**244**	**281**	**321**	**270**	**243**	**167**	**144**
Take photos	54%	79%↑	75%↑	66%↑	45%↓	27%↓	14%↓	4% ↓
Take videos	29%	47%↑	46%↑	37%↑	21%↓	6% ↓	4% ↓	1% ↓

	All mobile users	AB	C1	C2	DE	Male	Female
Base	**1670**	**399**	**492**	**337**	**442**	**808**	**862**
Take photos	54%	54%	58%	51%	50%	51%	56%↑
Take videos	29%	29%	27%	31%	29%	29%	29%

M7 – Please tell me from this list the types of things you use your mobile phone for, and how often you do each?
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Section 6

Media attitudes and critical understanding

6.1 Section overview

This section looks at adults' concerns about, attitudes towards, and levels of understanding of the media they engage with. It looks at awareness of the main sources of funding for TV programmes, radio stations and websites (and specifically the main source of funding for BBC content and commercial operators, for each of these media) and also looks at perceptions about regulation of each of the communications platforms and attitudes to online copyright infringement.

In this section we also report on questions relating to online data security and privacy; examining areas such as internet users' willingness to provide personal information online and the judgements made when providing such information. The study also looks at user attitudes towards websites' terms and conditions/ privacy statements, awareness of and use of various online security measures or safety features, the incidence of any negative online or mobile phone experiences, attitudes towards user protection and understanding of search engines.

6.2 Key findings

- Concerns about media among users are broadly unchanged since 2013; with 51% of internet users having any concerns about what is on the internet, 40% with a TV in the household having any concerns about television content, 24% of mobile users having any concerns about mobile phones, 21% of gamers with any concerns about gaming and 9% of radio users with any concerns about what is on radio.

- Concerns about apps among users have increased since 2013 from 20% to 28%, and mostly relate to security/ fraud or privacy issues.

- Since 2013 there has been no change in the proportion of adults who are able to correctly state how BBC TV programmes and the BBC website are funded. However, more adults are now aware how commercial TV programmes (72% vs. 67%) and search engine websites (45% vs. 36%) are funded.

- Adults are more likely than in 2013 to say that TV programmes (88% vs. 84%) and radio (79% vs. 72%) are regulated. Most people (60%) think there are rules or regulations for game content and what age you have to be to buy games.

- A clear majority of internet users agree (58% strongly, 21% slightly) that the internet needs to be regulated in terms of what can be shown and written online, and three in ten adults believe that 'all' (9%) or 'most' (20%) of what can be seen or read online is regulated.

- There is no consensus among internet users as to whether users should be free to say and do what they want online; with younger users and males more likely to agree and older users and females more likely to disagree.

- It remains the case that most internet users say they are happy to provide different types of personal information online. However, since 2013 more users say they would never provide their credit or debit card details or their mobile number because of security concerns.

- Awareness of website terms and conditions/ privacy statements is unchanged since 2013 (at 95% of internet users), but internet users are now more likely to say they don't read them (up from 21% to 26%).

- Fewer than half of internet users (42%) say they are 'very confident' they can stay safe online, and this measure is lower among older users, those in DE socio-economic groups and females.

- While a minority of internet users (40%) ever give out inaccurate or false information online to protect their personal identity, most (91%) say they only give the minimum amount of personal information required.

- Six in ten (60%) feel that some of the websites returned by search engines will be accurate or unbiased while others will not be; in other words, a response that shows a level of critical understanding about the provenance of content. This is unchanged since 2013.

6.3 Media concerns

Overall levels of concerns about media are unchanged since 2013

An important area we monitor is the extent to which people have concerns about the media they use, and which types of concern they have. We asked users if they had any concerns about what is on television, radio, the internet and about mobile phones, gaming and apps. Figure 117 compares the overall mentions of any concerns among users of each of the key platforms since 2005[46].

Half of all internet users (51%) say they have any concerns about what is on the internet. This compares to 40% of those in a TV household saying they have any concerns about television content. A quarter (24%) of mobile users say they have concerns about mobile phones, while one in five (21%) of those who play games say they have concerns about gaming. Around one in ten (9%) radio users have concerns about that particular media. None of these figures have changed to a statistically significant level since 2013.

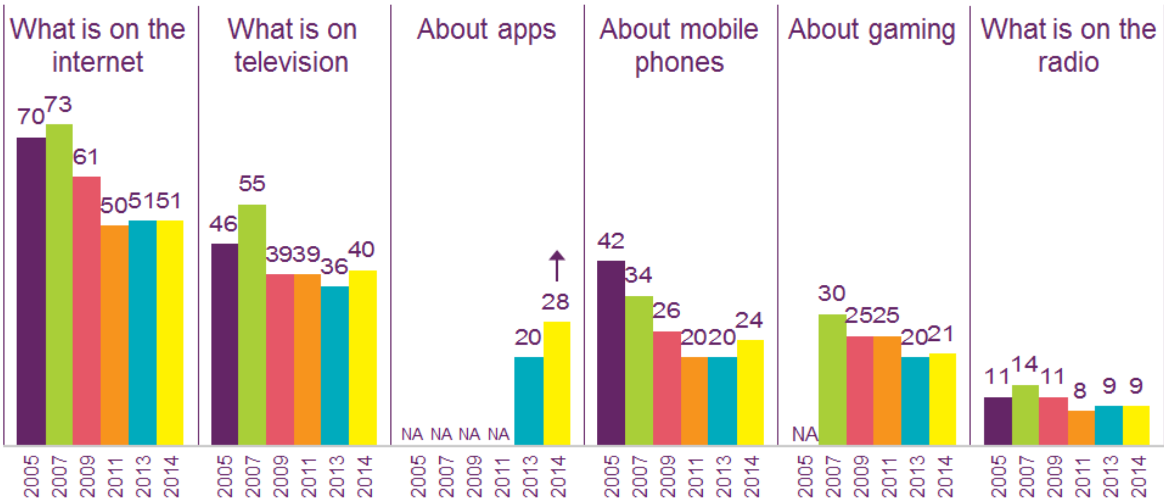
Almost three in ten app users (28%) say they have concerns about them, which is more likely than in 2013 (20%).

Demographic variations are as follows:

- **Internet:** Users aged 16-24 (36%) are less likely than average (51%) to have concerns about the internet, while 45-54s (59%) and 65-74s (62%) are more likely; women (57%) are also more likely than men (46%) to have concerns. Adults in C1 households who go online are more likely to have concerns compared to all internet users at (58%), while those in DE households are less likely to (41%).
- **Television:** Users aged 55 and over are more likely than all adult users to have concerns about TV (49% for 55-64s, 53% for 65-74s and 64% for 75+ vs. 40%). Unlike the internet, women (41%) are no more likely than men (37%) to have concerns about television and there are no differences by household socio-economic group.
- **Radio:** Concerns about what is on the radio are lower among 16-24s (3% vs. 9%), but there are no other variations by demographic group.
- **Games:** Among those who play games, concerns are less likely among 16-24s (11%) and more likely among those aged 55+ (33%) than all gamers (21%).
- **Mobile phones and apps:** Concerns about mobile phones or apps do not vary by age, gender or socio-economic group.

[46] Concerns about apps not asked about prior to 2013

Figure 117: Concerns about media among users: 2005-14



IN34/ T5/ R3/ G3/ M3/ IN23– Can you tell me if you have any concerns about what is on the internet/ TV/ radio. Do you have any concerns about gaming/ mobile phones/ apps?
Base: Adults aged 16+ who use each platform (variable base).
Arrows show significant changes between 2013 and 2014.

<u>Concerns with TV content</u>

Specific concerns about television content are unchanged since 2013, with one in four citing offensive content

When asked if they had any concerns about what is on television, four in ten adults with any TVs in the household said they had any. This is unchanged since 2013 (40% vs. 36%).

As shown in Figure 118, these concerns relate mainly to offensive content (23%)[47] and poor quality of content/ repeats (19%); both of these also remain unchanged since 2013. While few television users said they had any concerns that relate to mistrusting content perceived to be fixed/ fake/ biased, this has increased since 2013 (2% vs. 0%).

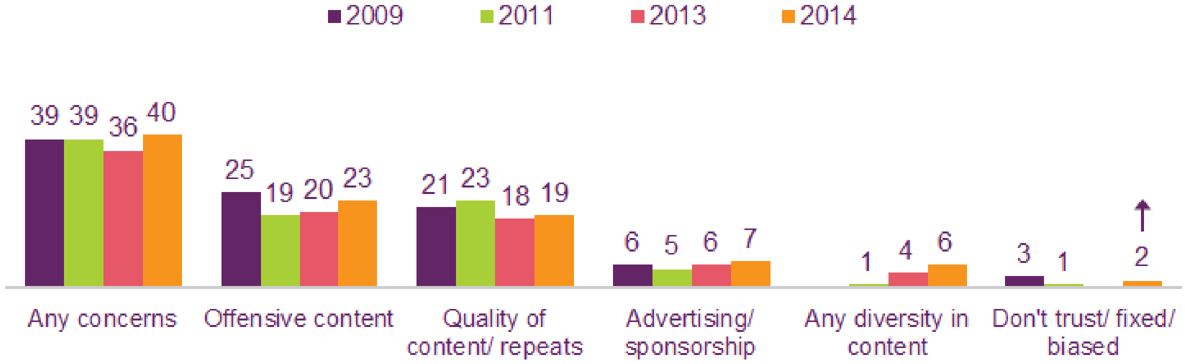
Adults aged 16-24 and 25-34 are less likely than all adults to have concerns about offensive content (14% for 16-24s and 13% for 25-34s vs. 23%), and about quality of content/ repeats (5% for 16-24s and 14% for 25-34s vs. 19%). Concerns relating to offensive content are more likely among those aged 65+ (35% for 65-74s and 45% for 75+ vs. 23%) and higher among those aged 55 and over relating to quality of content/ repeats (26% for 55-64s and 29% for 65-74s and 33% for 75+ vs. 19%).

Compared to all, adults in AB households are more likely to be concerned about mistrusting content that is perceived to be fixed/ fake/ biased (4% vs. 2%).

Women (27%) are more likely than men (19%) to be concerned about offensive content on television, while men (22%) are more likely to be concerned about quality of content/ repeats (than women (17%).

[47] The top three specific concerns about television are: violence (12%), bad/ offensive language (9%) and too many repeats (9%).

Figure 118: Concerns about television among users: 2009-14



T5 – Can you tell me if you have any concerns about what is on TV?
Base: Adults aged 16+ with any TVs in the household (1846 in 2014).
Arrows show significant changes between 2013 and 2014.

Concerns with internet content

Concerns about offensive or illegal online content still dominate, but those about risks to others/ society have increased since 2013

Half of all internet users told us that they had concerns about what is on the internet; unchanged since 2013 (51% in both years). These concerns relate mainly to offensive/ illegal content (38%) or risks to others/ society (28%).While concerns about offensive/ illegal content are unchanged since 2013 (38% vs. 35% in 2013), concerns relating to risks to others/society have nearly doubled (28% vs. 15% in 2013).

Although not shown on the chart, the top three specific[48] concerns about the internet, mentioned by adult internet users, are: content unsuitable for children (21%), strangers contacting children (19%) and sexual content/ pornography (18%).

Other concerns include security fraud (21%), personal privacy (9%) and advertising (7%). These are all unchanged since 2013.

In 2014, compared to all adult internet users, 16-24s are less likely to have concerns about offensive/ illegal content (24% vs. 38%), risks to others/ society (18% vs. 28%) and security/ fraud (13% vs. 21%).45-54s are more likely to have concerns about risks to others/ society (36% vs. 28%).

Three types of concern are less likely to be mentioned by adults in DE households, compared to all internet users: offensive / illegal content (30% vs. 38%), security/ fraud (15% vs. 21%) and personal privacy (5% vs. 9%).

Women are more likely than men to have concerns about offensive/ illegal content (44% vs. 31%) and risks to others/ to society (32% vs. 24%).

[48] These specific (unprompted) concerns are then placed into the categories described.

Figure 119: Concerns about the internet among users: 2009-14

IN34 – Can you tell me if you have any concerns about what is on the internet?
Base: Adults aged 16+ who go online at home or elsewhere (1609 in 2014).
Significance testing shows any change between 2013 and 2014

<u>Concerns with mobile phones</u>

Overall concerns about mobile phones are unchanged since 2013

When asked if they had any concerns about mobile phones, a quarter (24%) of adults who personally use a mobile phone said they did. No single category of concern dominates, with one in ten mentioning concerns relating to affordability (11%), and fewer than one in ten mentioning concerns relating to risks to others or society as a whole (8%), security/ fraud (6%), privacy (5%) and health, junk/ spam text messages and general cost of calls (4%). While the incidence of any concerns among mobile users is unchanged in 2014, concerns about affordability have increased (11% vs. 7% in 2013).

Mobile phone users aged 75 and over are less likely than all users (6%) to have concerns about security/ fraud (0%), as are DE users (3%), while AB users are more likely (10%). Concerns about health risks are slightly more likely among women (5%) than men (3%).

Figure 120: Concerns about mobile phones among users: 2009-14

M3 – Can you tell me if you have any concerns about mobile phones?
Base: Adults aged 16+ who personally use a mobile phone (1670 in 2014).
Arrows show significant changes between 2013 and 2014.

Concerns with apps

App users are more likely to have concerns compared to 2013

App users[49] were asked if they had any concerns about apps, and more than a quarter (28%) indicated that they did have; an increase since 2013 (20%). Concerns are more likely to relate to security/ fraud or privacy issues (20%) than to offensive content (9%). However, both these types of concerns have increased since 2013.

Compared to all app users (9%), concerns about offensive content are more likely among 35-44s (14%) and less likely among 16-24s (3%).Concerns about security/ fraud/ privacy are less likely among DEs (14% vs. 20%).

Figure 121: Concerns about apps among users: 2013 vs. 2014

IN23 – Can you tell me if you have any concerns about apps?
Base: Adults aged 16+ who use apps (1080 in 2014). Arrows show significant changes between 2013 and 2014.

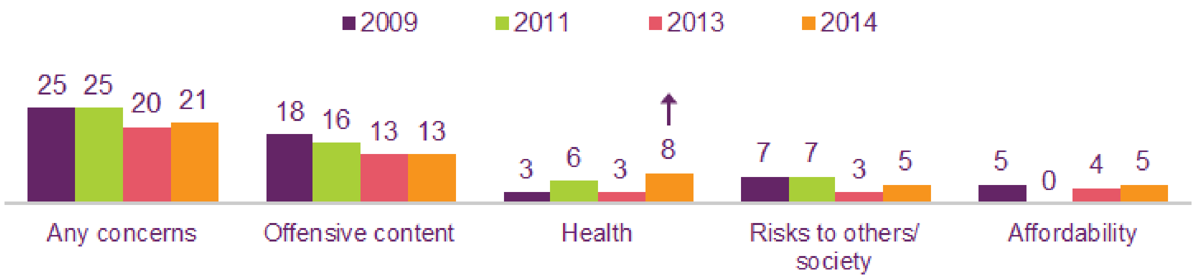
Concerns with gaming

Concerns about gaming are unchanged since 2013 at an overall level

When asked if they had any concerns about gaming, around one in five adults who ever play games said they did (21%); unchanged since 2013 (20%). Concerns relate mainly to offensive content (13%), while others relate to risks to health (8%), risks to others/ society (5%), and affordability (5%). Compared to 2013 (3%), concerns about health risks have increased (8%).

In 2014, those aged 55+ are more likely to say they have concerns relating to health risks (18% vs. 8%) and 16-24s are less likely to have concerns about affordability (1% vs. 5%).

Figure 122: Concerns about gaming among users: 2009-14



G3 – Can you tell me if you have any concerns about gaming?
Base: Adults aged 16+ who play games (743 in 2014). Arrows show significant changes between 2013 and 2014.

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[49] Defined as those who go online on either a smartphone, tablet or smart TV and say they use apps on any of these devices

6.4 Media funding

Compared to 2013, adults are more likely to be aware of how commercial television and search engine websites are mainly funded

All adults were asked to say, without prompting, what they believed were the main sources of funding for television programmes and websites. For each media, questions were asked about the main source of funding for content on BBC and for commercial operators.

As in previous years, unprompted awareness of the main source of funding is higher for television than for the internet. For both of these platforms, awareness of the main source of funding for the BBC is higher than for commercial operators.

TV funding

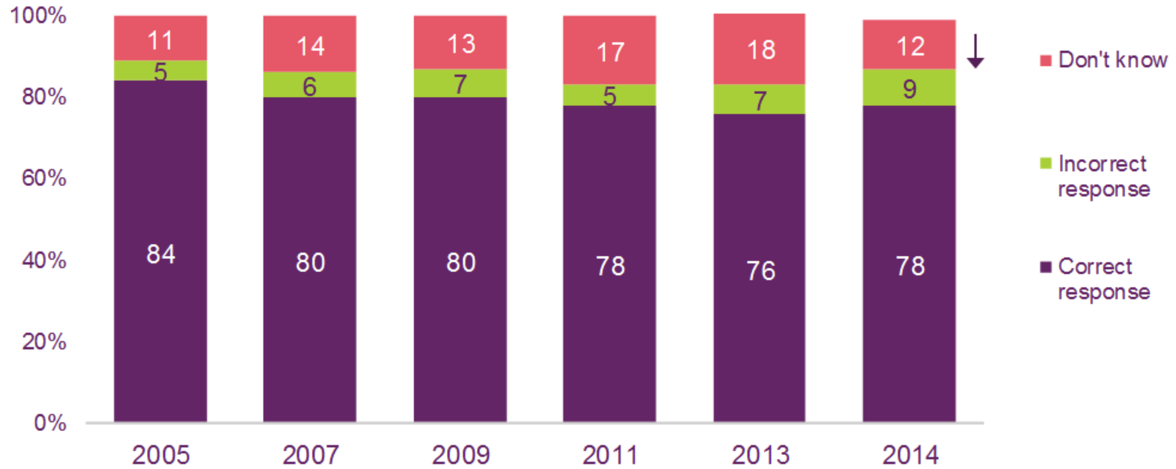
BBC television funding

As shown in Figure 123, awareness of the licence fee as the main source of funding for BBC television programmes has not changed since 2013 (78% from 76%). However, adults are less likely to say they are unsure (12% vs. 18% in 2013).

Adults aged 16-24 and 25-34 are less likely to give the correct response (56% for 16-24s and 70% for 25-34s vs. 78% for all adults. Adults aged 45 and over are more likely to be aware that the licence fee is the main source of funding (88% for 45-54s, 89% for 55-64s, 87% for 65-74s and 84% for 75+ vs. 78% for all).

Those in AB households (84%) are more likely to give the correct response than DEs (73%), and men (81%) are more likely than women (76%).

Figure 123: Awareness of how BBC TV programmes are mainly funded: 2005-14



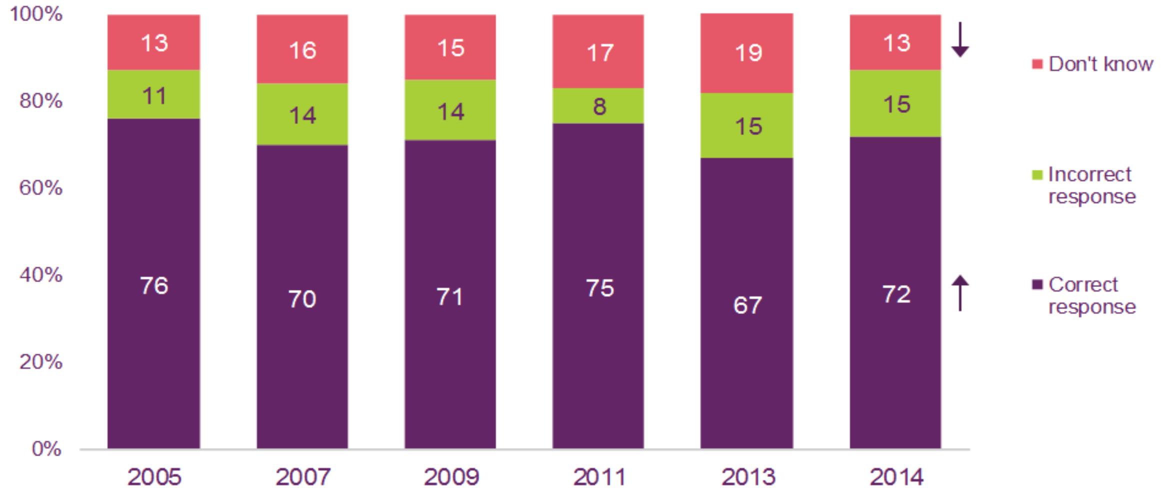
T3 – How would you say BBC TV programmes are mainly funded?
Base: All adults aged 16+ (1890 in 2014).
Arrows show significant changes between 2013 and 2014.

Commercial television funding

As shown in Figure 124, adults are more likely to be aware that advertising is the main source of funding for television programmes on the commercial stations (72%) than in 2013 (67%).

As with awareness of how BBC programmes are mainly funded, 16-24s (52%), 25-34s (60%) and DEs (60%) are less likely to give the correct response (72%), while adults aged 45 and over (79% aged 45-54, 81% aged 55-64), 81% aged 65+) and those in AB households are more likely to (79%).

Figure 124: Awareness of how commercial TV programmes are funded : 2005-14



T4 –How would you say programmes are mainly funded on ITV, Channel 4 and Five?
Base: All adults aged 16+ (1890 in 2014). Arrows show significant changes between 2013 and 2014.

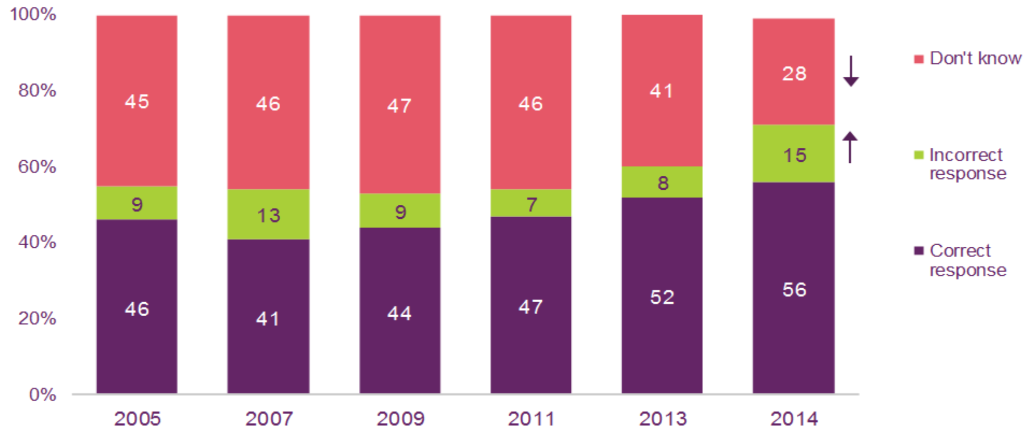
Website funding

BBC website funding

More than half of adults correctly identify the licence fee as the main source of funding for the BBC website, unchanged since 2013. However (as shown in Figure 125), adults are less likely to say they are unsure how the BBC website is funded (28% vs. 41%), and more likely to give an incorrect response (15% vs. 8% in 2013).

Compared to all (56%), the correct response is more likely among 45-54s (66%) 55-64s (67%) and ABs (67%), and is less likely among 16-24s (42%), those aged 75+ (46%) and DEs (43%). Men are also more likely than women to give this response (62% vs. 51%).

Figure 125: Awareness of how BBC website is funded: 2005-14



IN32 – How do you think the BBC's website is mainly funded?
Base: All adults aged 16+ (1890 in 2014). Arrows show significant changes between 2013 and 2014

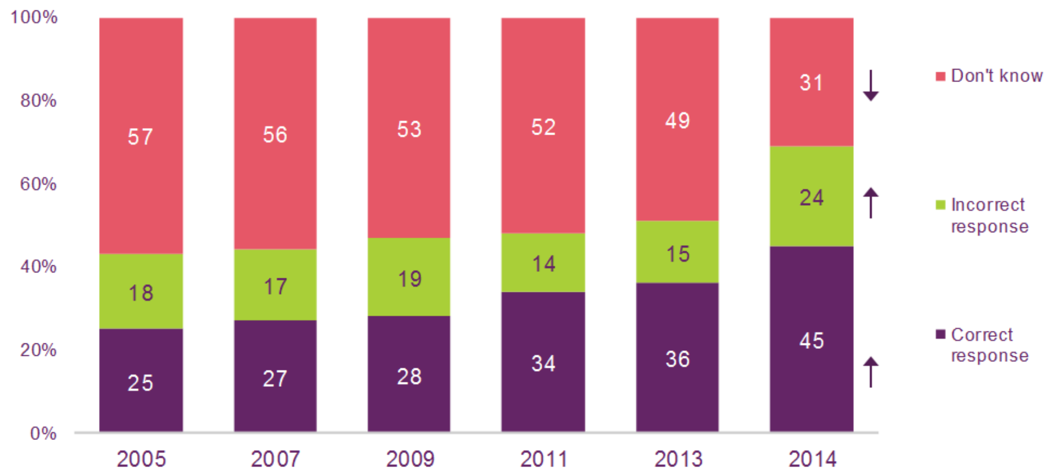
Search engine funding

Close to half (45%) of adults are aware of how search engine websites are mainly funded, three in ten (31%) are unsure, and 25% incorrect. Those aged 35-44 (56%) are more likely to give the correct response[50], while 16-24s (36%) and those aged 75+ are less likely (22%).

Compared to 2013 (See Figure 126), adults are more likely to be aware of how search engines are mainly funded (45% vs. 36%), less likely to be unsure (31% vs. 49%), but are also more likely to give an incorrect response (24% vs. 15%).

Adults in AB households are more likely to be aware of how search engine websites are mainly funded (60% vs. 45% for all), while those in DE households are less likely (28%). Men (51%) are also more likely than women (39%) to give the correct response.

Figure 126: Awareness of how search engines are funded: 2005-14



IN33 – How do you think search engine websites such as Google or Ask.com are mainly funded?
Base: All adults aged 16+ (1890 in 2014). Arrows show significant changes between 2013 and 2014

[50] Awareness is taken from two coded responses deemed as correct - 1) 'Advertising on the website' and 2) 'Advertisers pay when users click through from sponsored links to their website'

Compared to 2013, adults are less likely to agree that as long as the internet provides good websites it doesn't really matter who owns them or how they are funded

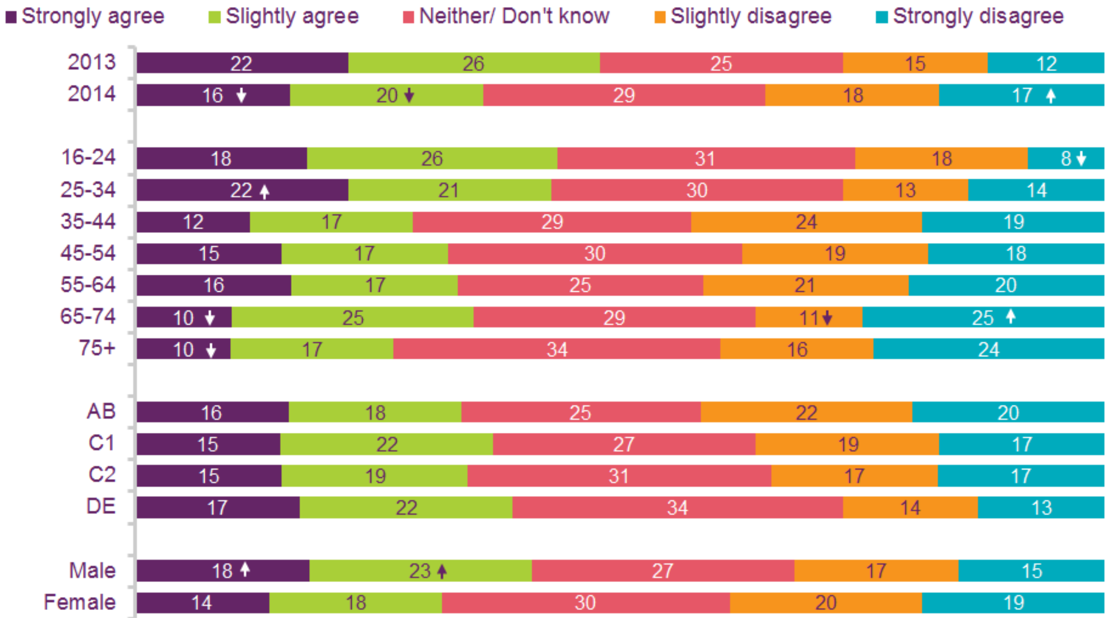
Internet users who go online at home or elsewhere were asked the extent to which they agree with the statement: *"As long as the internet provides good websites it doesn't really matter who owns them or how they're funded".*

Figure 127 shows that there has been a decrease in agreement since 2013. Internet users are less likely than they were to agree strongly (16% vs. 22%) and slightly (20% vs. 26%). Unlike in previous years, there is no clear consensus as to whether internet users agree overall (36%) or disagree overall (35%) with the statement.

Compared to all internet users (16%), those aged 25-34 (22%) are more likely to agree strongly. Those aged 65-74 (10%) and 75+ (10%) are less likely to agree strongly.

There are no differences by household socio-economic group, but men (41%) are more likely than women (32%) to agree with the statement.

Figure 127: Extent agree with statement: "it doesn't matter who owns a website or how it's funded as long as good websites are available"



IN35F…"As long as the internet provides good websites it doesn't really matter who owns the websites or how they're funded?"
Base: All respondents (1890 in 2014, varies by demographic)
Arrows show 1) significant changes (99% level) between 2013 and 2014, and 2) significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

6.5 Media regulation

Broadcast media (TV and radio) regulation

Adults are more likely to be aware of regulation for both broadcast media compared to 2013.

Adults were asked to say whether they believe that content is regulated[51] across a variety of platforms. As shown in Figure 128 close to nine in ten adults[52] (88%) are aware that TV programmes are regulated; an increase since 2013 (84%).

Although not shown in the chart, those aged 35-64 are more likely to be aware that television programmes are regulated (92% for 35-44s, 93% for 45-54s, and 93% for 55-64s) as are those in AB households (95%). Adults aged 16-24 (76%), aged 75+ (82%) and those in DE households (79%) are less likely to be aware of TV regulation, compared to all adults (88%).

Figure 128: Awareness of TV regulation: 2005-14

T6 – As far as you know, are TV programmes regulated? Base: All adults aged 16+ (1890 in 2014). Arrows show significant changes between 2013 and 2014

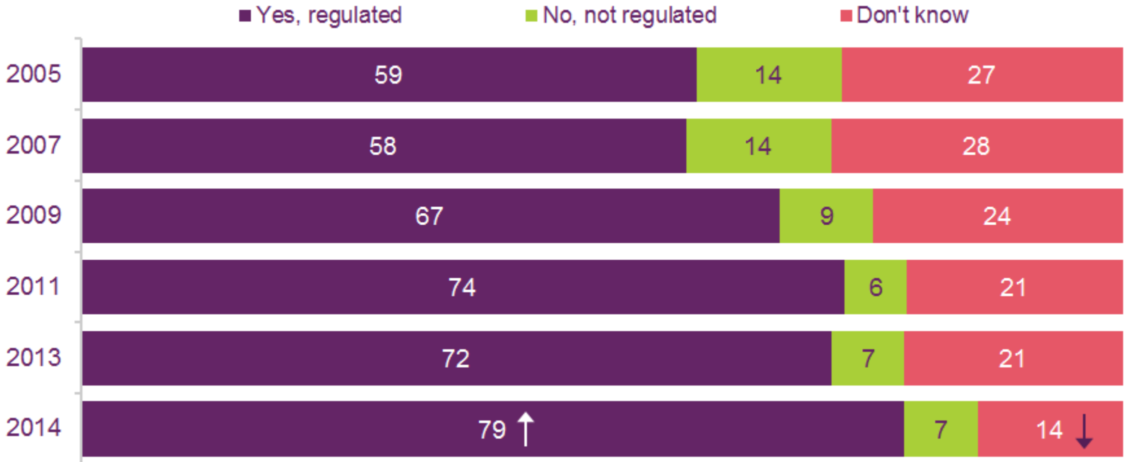
Compared to TV, slightly fewer adults are aware that radio is regulated (79%, rising to 84% among radio listeners). However, this figure has increased to a statistically significant level since 2013 (72%), as shown in Figure 129.

Compared to all adults, 16-24s (67%) and DEs (66%) are less likely to be aware of radio regulation (79% for all).Those aged 35-44 (85%) and 45-54 (87%) are more likely to be aware, as are those in AB (89%) and C1 (84%) households.

[51]The following definition was offered as an explanation of a regulator. "A regulator is often called a 'watchdog' – it sets rules or guidelines about content. People can also complain to the regulator if they feel something was inappropriate - perhaps because it was offensive, harmful, inaccurate or unfair."

[52] Note: the figures for all adults are the same among those with a TV in the household

Figure 129: Awareness of radio regulation: 2005-14



R4 – As far as you know, is radio regulated in terms of what can be broadcast?
Base: All adults aged 16+ (1890 in 2014). Arrows show significant changes between 2013 and 2014

Gaming rules and regulation

Most adults are aware that there are rules and regulations in place for gaming – with this more likely among 35-44s and ABs

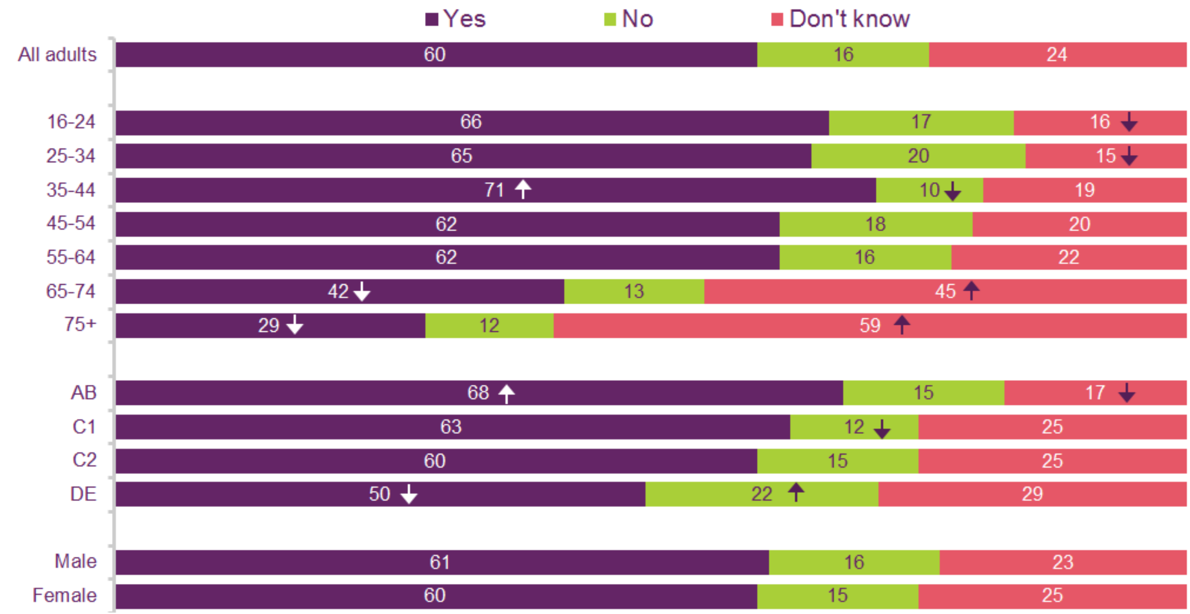
Adults were asked the following question for the first time in 2014*: "As far as you know are there any rules or regulations in place about the content of computer games or online games and what age you have to be to buy them?"* The results for this question are in Figure 130.

Six in ten adults (60%, rising to 74% among those who ever play games) are aware there are regulations in place, with 16% unaware. A quarter of adults (24%) are unsure whether such rules or regulations exist.

Compared to all (24%), 16-24s (16%) and 25-34s (15%) are less likely to say they are unsure of whether these regulations are in place, while these figures are higher for 65-74s (45%) and 75+ year olds (59%). As such, a minority of adults aged 65+ say they are aware of rules or regulations (42% for 65-74s and 29% for those aged 75+).

Those aged 35-44 (71%) and ABs (68%) are more likely than all adults (60%) to believe there are rules or regulations are in place (71%), while DEs are less likely (50%)

Figure 130: Awareness of rules and regulations relating to the content of games



G4. As far as you know, are there any rules or regulations in place about the content of computer games or online games and what age you have to be to buy them?
Base: Adults aged 16+ (1890 in 2014, varies by demographic)
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Internet regulation

Three in ten adults believe that all or most online content is regulated, but double this proportion agree strongly that the internet needs to be regulated

Respondents were asked how much of what can be seen and read online they think is regulated[53] and the results are shown in Figure 131.

One in ten adults[54] (9%) say that 'all' of what can be seen and read online is regulated, with twice as many (20%) saying 'most of it'. Close to half (46%) say that 'some' of it is regulated. Fewer than one in ten (7%) say that 'none' of what is seen or read online is regulated, and a further one in five is unsure (18%).

Those aged 75 and over are less likely to give the broadly correct response that 'some' content online is regulated (24%), although this is due to adults in this age group being much more likely to say they are unsure (53% vs. 18% overall).

Those in AB households are more likely to say 'some' of what they see/ read online is regulated (54% vs. 46%) while those in DE households are less likely (35% vs. 46%).

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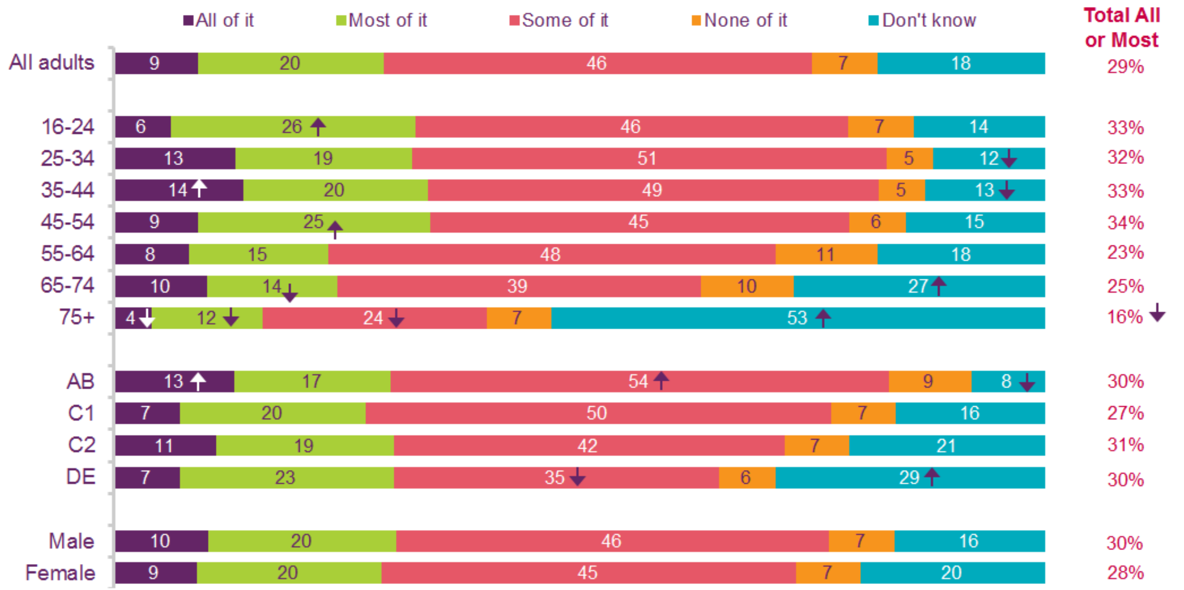
[53] This question differs to previous years – it was previously "As far as you know, is the internet regulated in terms of what can be shown and written?" – Among all adults the responses were Yes=46%, No=26%, Don't Know=28%.

[54] These figures are similar among internet users (All=10, Most=21, Some=50, None=7, Don't know=12, Total All or Most=31)

Figure 131: Opinions on extent to which online content is regulated

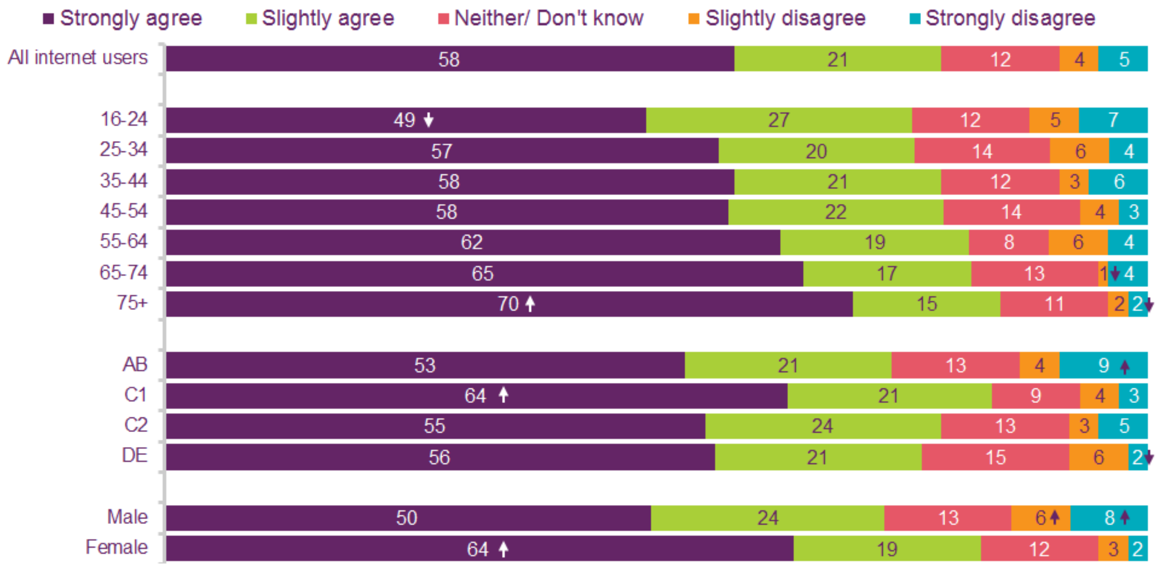


IN36…As far as you know, how much of what can be seen or read online is regulated?
Base: Adults aged 16+ (1890 in 2014, varies by demographic) . Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Internet users were also asked the extent to which they think the internet needs to be regulated in terms of what can be shown and written online. As shown in Figure 132, a majority agree strongly (58%), with a further one in five (21%) agreeing slightly. Around one in ten (9%) disagree overall (either strongly or slightly).

Those aged 16-24 are less likely than all users to agree strongly (49% vs. 58%) while those aged 75 and over are more likely (70% vs. 58%).Those in C1 households (64%) are more likely to strongly agree than DEs (58%), and men (8%) are more likely to strongly disagree than women (2%).

Figure 132: Extent of agreement that the internet needs to be regulated, by demographic group



IN35C… "The internet needs to be regulated in terms of what can be shown and written online"
Base: Adults aged 16+ who go online at home or elsewhere (1890 in 2014, varies by demographic) Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

16-34s and males are more likely to agree that they should be free to say and do what they want online

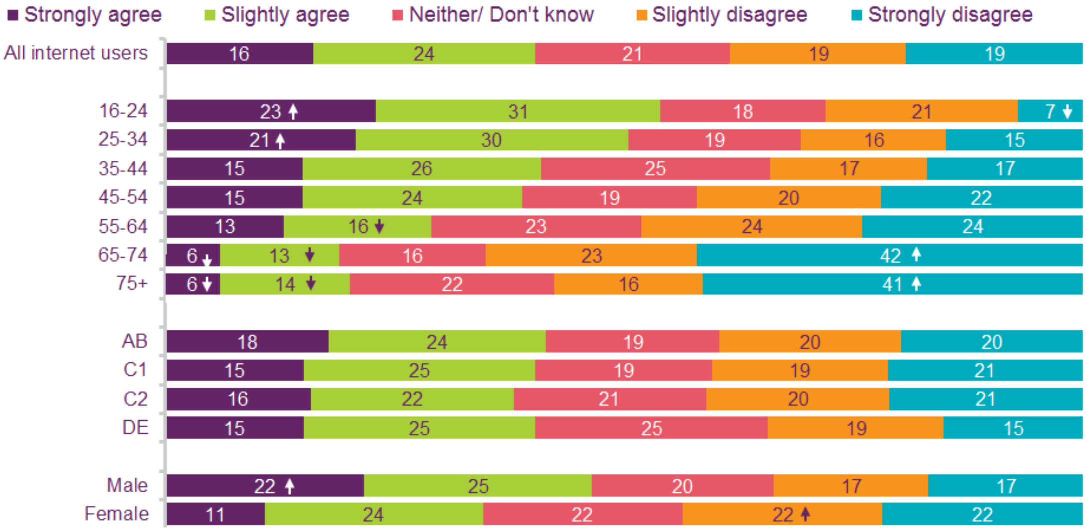
Adults who go online at home or elsewhere were asked the extent to which they agree with the statement: *"I should be free to say and do what I want online*[55]*"*.

A similar proportion of adults agree (40%) and disagree (39%) in total (i.e. including 'strongly' and 'slightly' responses). This is also the case for strongly agree (16%) and strongly disagree (19%).

Those aged 16-24 (23%) and 25-34 (21%) are more likely than all adults (16%) to strongly agree, while those aged 65 and over are more likely to strongly disagree (42% for 65-74s and 41% for 75+ vs. 19% for all).

Men (22%) are more likely than women (11%) to strongly agree, whereas women are more likely to slightly disagree (22% vs. 17% for men).

Figure 133: Extent of agreement "I should be free to say and do what I want online", by demographic group



IN35A… "I should be free to say and do what I want online"
Base: Adults aged 16+ who go online at home or elsewhere (1890 in 2014, varies by demographic).
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

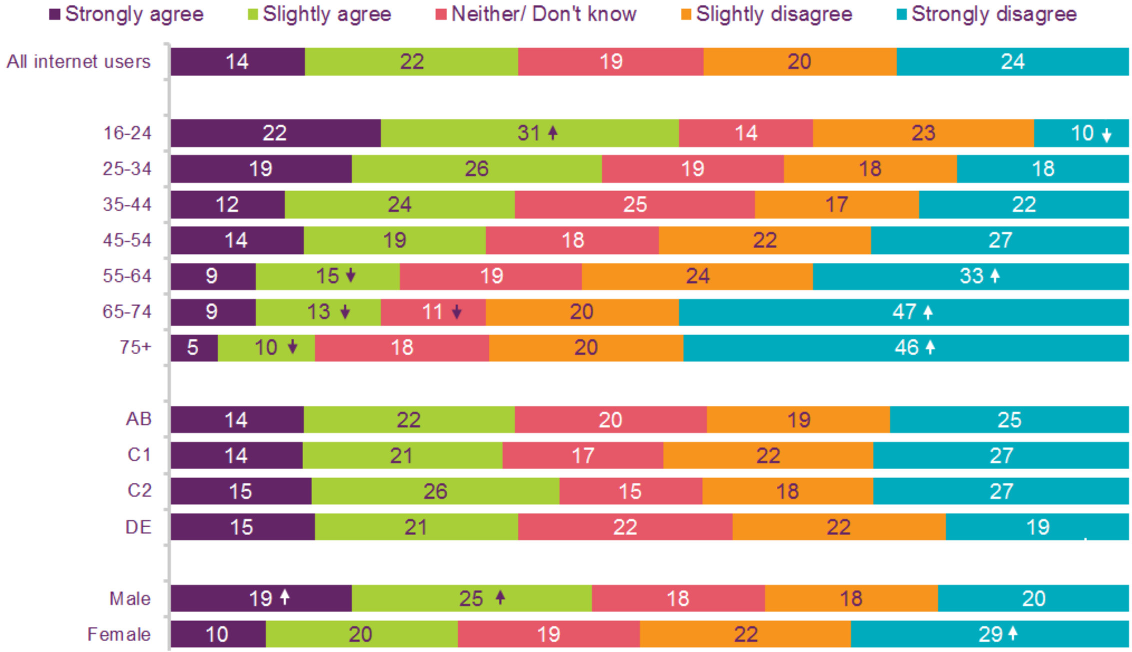
Internet users were also asked a very similar question but with the subtle difference of stressing the collective - *"Everyone should be free to say and do what they want online"*, and the results are shown in Figure 134.

Unlike the personal freedom question, the proportion who slightly or strongly disagree (44%) outweighs agreement (36%). This is driven by a higher proportion disagreeing strongly – 24% vs. 19%, and this is more prominent among those aged 55+ (33% for 55-64s, 47% for 65-74s and 46% for 75+).

Close to four in ten internet users (37%) agree with the statement, with 14% agreeing strongly. This is very similar to the levels shown for the question on personal freedom previously discussed (40% and 16% respectively), and agreement is higher among 16-24s (53%) and 25-34s (44%). Men are also more likely than women to agree (44% vs. 30%).

[55] These questions were not asked in 2013.

Figure 134: Extent of agreement "Everyone should be free to say and do what they want online", by demographic group



IN35B – Please use this card to tell me the extent to which you agree or disagree with each statement I read out – "Everyone should be free to say and do what I want online"
Base: Adults aged 16+ who go online at home or elsewhere (1890 in 2014, varies by demographic)
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Close to half of UK adults say that copyright infringement should be illegal

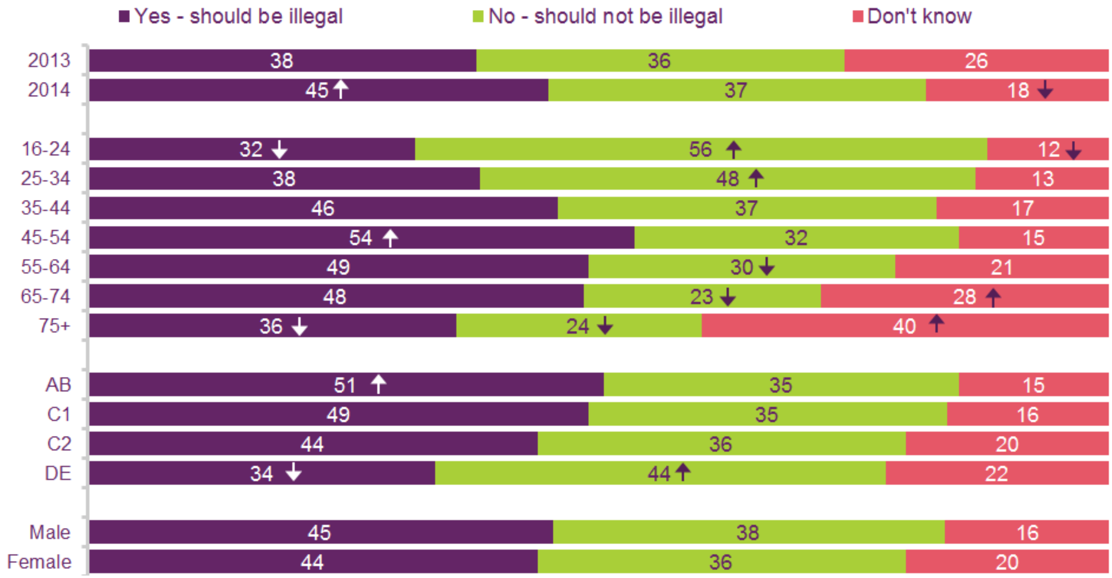
Respondents are asked whether downloading shared copies of copyright music and films without the permission of the rights-holder should be illegal, and this is shown in Figure 135.

Adults are more likely in general to believe that it should be illegal (45%) than it should be legal (37%), with the remainder (18%) unsure. There has been a shift since 2013 (from 38% to 45%) towards thinking that file-sharing should be illegal, and a decrease in the proportion of adults who don't know or don't have an opinion on this issue (from 26% to 18%).

Those aged 16-24 and 25-34 are more likely to say that downloading music and films in this way should be legal (56% for 16-24s and 48% for 35-44s vs. 37% for all). Those aged 45-54 are more likely to say it should be illegal (54% vs. 45%) while those aged 65-74 (28%) and 75+ (40%) are more likely to be unsure.

Adults in AB socio-economic groups are more likely to say file-sharing should be illegal (51% vs. 45%), while those in DE households are less likely to say this (34% vs. 45%) and more likely to say it should not be illegal (44% vs. 37%).

Figure 135: Attitudes towards online copyright infringement: 2009-14



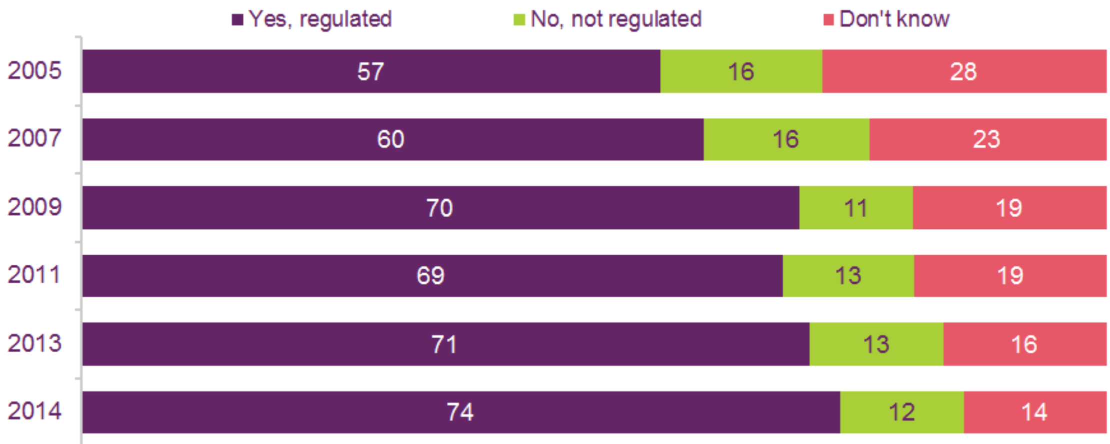
IN40 – Music and films can be downloaded from the internet in two main ways – by paying at an online shop like iTunes or Tesco.com, or by downloading for free from a site where someone has shared their copy of the music or film. Sharing content for free in this way is often illegal. Do you think that downloading music and movies for free in this way should be illegal?
Base: Adults aged 16+ (1890 in 2014, varies by demographic)
Arrows show 1) significant changes (99% level) between 2013 and 2014, and 2) significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Press regulation

In addition to broadcast, gaming and internet regulation, we also ask respondents whether they believe the press is regulated. Three quarters of adults (74%) believe it is, with similar proportions saying they are unsure (14%) or that it is not regulated (12%).These measures are unchanged since 2013.

Although not shown in the chart, adults aged 35-44 are more likely to be believe that the press is regulated (81%) as are adults in AB households (86%), while those in DE households are less likely (60%). Men (77%) are also more likely than women (72%).

Figure 136: Belief that the press is regulated: 2005-14



Z1 – As far as you know, is the press regulated in terms of what they show and write?
Base: All adults aged 16+ (1890 in 2014).Significance testing shows any change between 2013 and 2014

6.6 Confidence in using the internet

More than half of those who go online say they are very confident users, and this is higher among younger age groups, males and ABs.

We ask internet users to rate their levels of confidence across several aspects of using the internet, and at an overall level as an internet user.

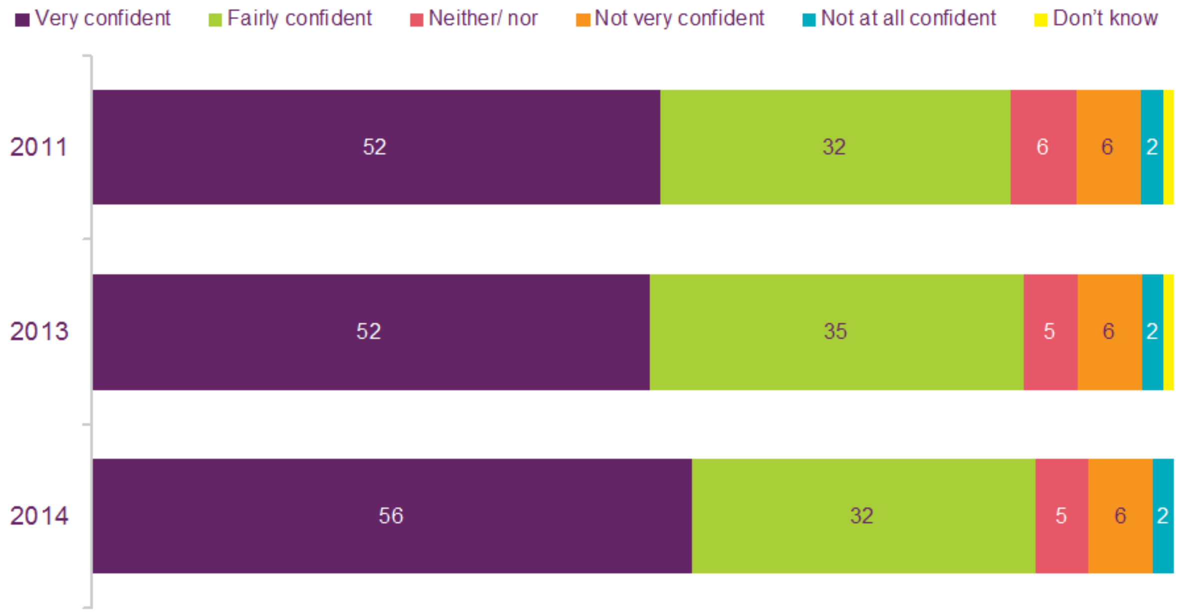
Overall, how confident are you as an internet user?

As shown in Figure 137 over half (56%) of all UK adults who go online describe themselves as being 'very confident' as an internet user, and this hasn't changed to a statistically significant level since 2013 (52%). Over eight in ten users are either 'very' or 'fairly' confident (87%) and this also hasn't changed since 2013 (86%).

Internet users aged 16-34 are more likely to say they are 'very confident' than the average adult internet population (74% for 16-24s, 70% for 25-34s vs. 56% for all), as are AB adults compared to all (66% vs. 56%); this is also the case for men compared to women (62% vs. 50%).

Those aged 55+ are more likely than all internet users to describe themselves as 'not confident' (13% for 55-64, 20% for 65-74 and 35% for 75+ vs. 8% for all adults), as are DEs (12% vs. 8%) and women (9% vs. 6% for men) and.

Figure 137: Confidence as an internet user, by year



IN13A/ B – Overall, how confident are you as an internet user?
Base: Adults aged 16+ who use the internet at home or elsewhere (1609 in 2014)

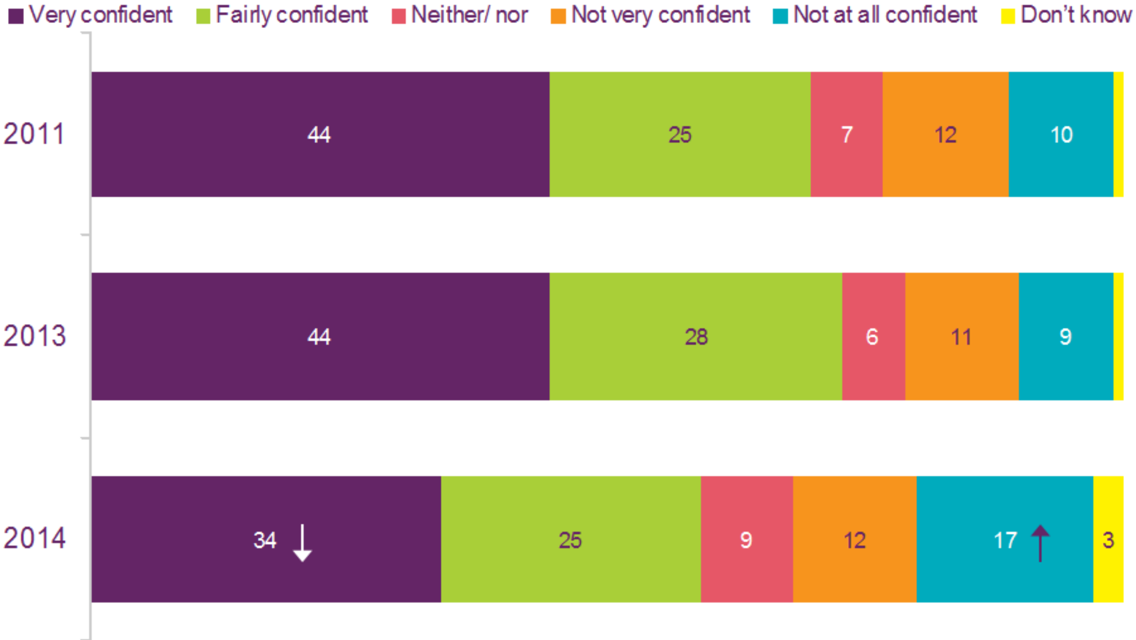
How confident are you using the internet to do creative things – like making blogs, sharing photos online, or uploading short videos?

Six in ten (59%) internet users say they are either very or quite confident in using the internet to do creative things (like making blogs, sharing photos online, or uploading short videos). This has decreased since 2013 from 72%, and is attributable to lower levels citing 'very confident' (from 44% to 34%).

Although not shown in the chart, there are some differences by demographic group:

- Younger internet users are more likely than all adults (34%) to say they are 'very confident' in using the internet to do creative things (53% for 16-24s and 46% for 25-34s).
- Those aged 45 and over are more likely to say they are either not very confident or not confident at all (37% for 45-54s, 47% for 55-64s, 55% for 65-74 and 64% for 75+ vs. 29% for all adults).
- Men are more likely than women to be 'very confident' (38% vs. 30%)
- AB adults are more likely to be 'very confident' (43% vs. 34% for all).
- Users in DE households are also more likely to say they are not confident in using the internet to do creative things (36% vs. 29% for all).

Figure 138: Confidence with creative activities online: 2011-14



IN13A/ B – How confident are you using the internet to do creative things – like making blogs, sharing photos online, or uploading short videos?
Base: Adults aged 16+ who use the internet at home or elsewhere (1609 in 2014)
Arrows show significant changes (99% level) between 2013 and 2014

Figure 139 reports on three measures that were added to the study in 2014:

How confident are you that you can find the information that you want online?

Six in ten internet users say they are 'very confident' they can find the information that they want online (61%), with only 4% saying they are not confident. Those aged 16-24 (73%), men (67%) and ABs (69%) are more likely to be 'very confident' in this respect. On the flip side, those aged 65+ (9% for 65-74, 17% for 75+) and DEs (7%) are more likely to not be confident they can find the information that they want online.

When you see or read things online, how confident are you in knowing what is advertising and what is not?

Similar to the question on online safety, a majority (81%) of internet users are either very or quite confident that they know what is advertising and what isn't online. However, fewer than half (43%) are 'very confident'. Around one in ten (8%) say they are not confident (either not very or not at all).

As with each of the other measures discussed, 16-24s (52%), men (49%) and ABs (54%) are more likely to be 'very confident' in knowing what is online advertising. Females (11%), DEs (13%) and those aged 75+ (20%) are also more likely to say they are not confident.

How confident are you that you can stay safe online?

A majority of internet users are either very or quite confident that they can stay safe online (80%). However, fewer than half (42%) are 'very confident'. Around one in ten (11%) say they are not confident (either not very or not at all).

Those aged 16-24 (54%), men (47%) and ABs (50%) are more likely than average to be 'very confident' that they can stay safe online, while those aged 75+ are more likely to say they are not confident (23%), as are women (14%) and DEs (15%).

Figure 139: Confidence online - search, safety and advertising

IN13C/D/E – See chart
Base: Adults aged 16+ who use the internet at home or elsewhere (1609 in 2014).

6.7 Understanding search engine results

Most users understand how search engines operate

Users of search engines (95% of all internet users in 2014) were asked to say which of the following statements was closest to their own opinion:

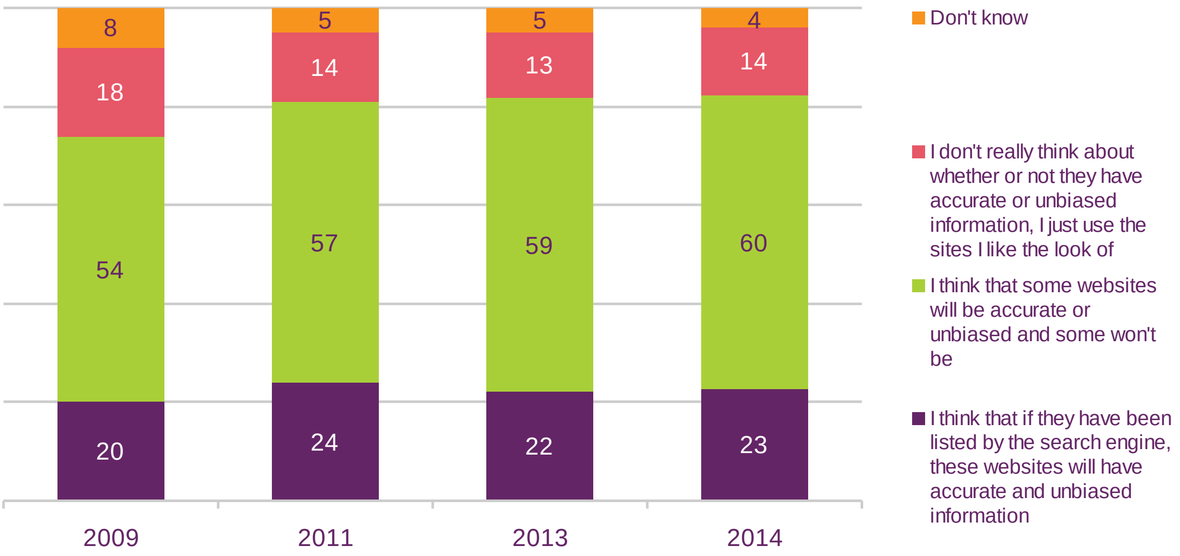
- *"I think that if they have been listed by the search engine, these websites will have accurate and unbiased information."'*
- *"I think that some of the websites in the list will be accurate or unbiased and some won't be."*
- *"I don't really think about whether or not they have accurate or unbiased information, I just use the sites I like the look of."*

Six in ten (60%) feel that some of the websites returned will be accurate or unbiased while others will not be; in other words, a response that shows a level of critical understanding about the provenance of content. This measure is similar to that in 2013 (59%), as shown in Figure 140.

No particular age group stands out, but ABs are more likely to 'understand' search engine results (66%) while C2s and DEs are less likely (both 52%).

Two in ten (23%) say that if results are listed by the search engine, the websites must be accurate/unbiased. This measure is also unchanged since 2013. The response is more likely to be given by women (25%) than by men (20%), with no other demographic variations observed.

Figure 140: Understanding of how search engines operate: 2009-14



IN45 – When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages?
Base: All adults aged 16+ who ever use search engines (407 in 2009, 1090 in 2010, 1285 in 2011, 1199 in 2013, 1516 in 2014).

6.8 Online privacy

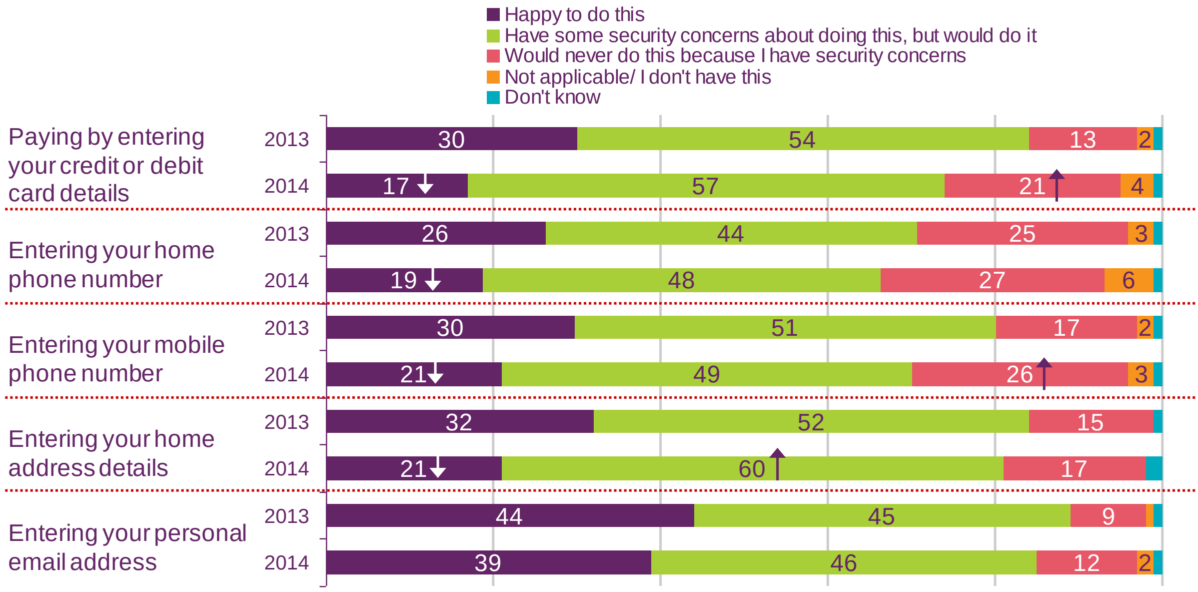
Fewer internet users say they would be happy to enter personal details online than in 2013

Internet users were asked how they feel about entering five types of personal information online, and Figure 141 shows the responses given in 2013 and 2014[56].

Two-thirds of adults or more, say they are either happy to provide each type of information, or would do so while having some security concerns about this. Of the five types of information, internet users are most relaxed about providing their email address; with four in ten (39%) happy to do this. Slightly more (46%) have some security concerns but still provide this information, while one in eight (12%) say they would not provide their email address because of security concerns. These are all unchanged since 2013.

For each of the other four types of personal information, internet users are less likely than in 2013 to say they would be 'happy to' provide this information. Two of these types of personal information see an increase in users saying they 'would never' provide this information because of security concerns: *paying by entering credit or debit card details* (21% vs. 13% in 2013) and *entering your mobile phone number* (26% vs. 17% in 2013). For both of these types of personal information, the proportion of users who say they 'would never' provide this information is higher among those aged 55 and over, and those in DE households. Furthermore, internet users in DE households are more likely than all users to say they 'would never' provide each of the five types of personal information shown in Figure 141.

Figure 141: Security concerns with sharing personal information: 2013 vs. 2014



IN38A-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.
Base: Adults aged 16+ who use the internet at home or elsewhere (1609 in 2014).
Arrows show significant changes (99% level) between 2013 and 2014

[56] The figures for previous years are covered in more detail in Section 3.5

Eight in ten internet users say they would make a judgement about a website before entering personal information

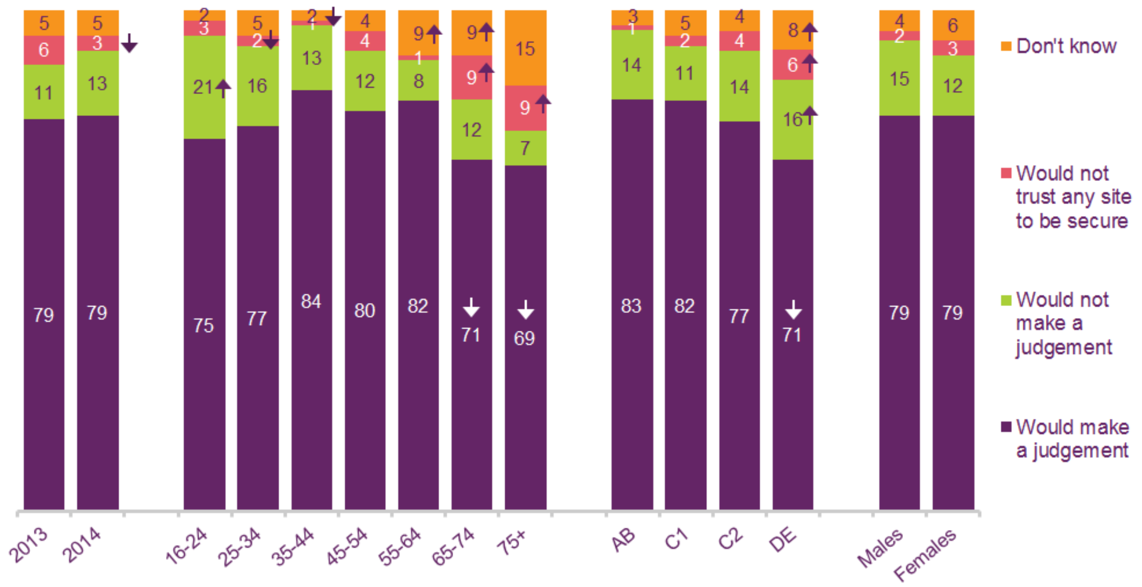
Having asked internet users to tell us how they would feel about entering personal details online, we also ask them to say whether they would make a judgement about a website before entering these types of details. Internet users were not prompted with any types of checks they might make, but responses were recorded. Figure 142 shows the extent to which internet users name a type of judgement they would make.

Four in five (79%) internet users say they would make a judgement about a website before entering any personal details, with no change since 2013. The most commonly cited judgements made are 'a company I've heard of' (42%), a 'padlock symbol in corner of the screen' (30%) and 'approved site rating' (23%).

Those aged 65 and over are less likely to say they would make a judgement (71% for 65-74 and 69% for 75+), with the latter age group (15%) more likely than all users to be unsure (5%). Both older age groups are more likely to say they would not trust any site to be secure (9% 65-74, 9% 75+ vs. 3%). Users aged 16-24 (21%) are more likely than all users (13%) to say they would not make a judgement about a website before entering any personal details.

The only differences across the socio-economic groups relate to those in DE households, who are more likely to be unsure (8% vs. 5%), more likely to say they would not trust any site to be secure (6% vs. 3%) and less likely to say they would make a judgement (71% vs. 79%). There are no differences between men and women.

Figure 142: Whether make judgements before entering personal details online



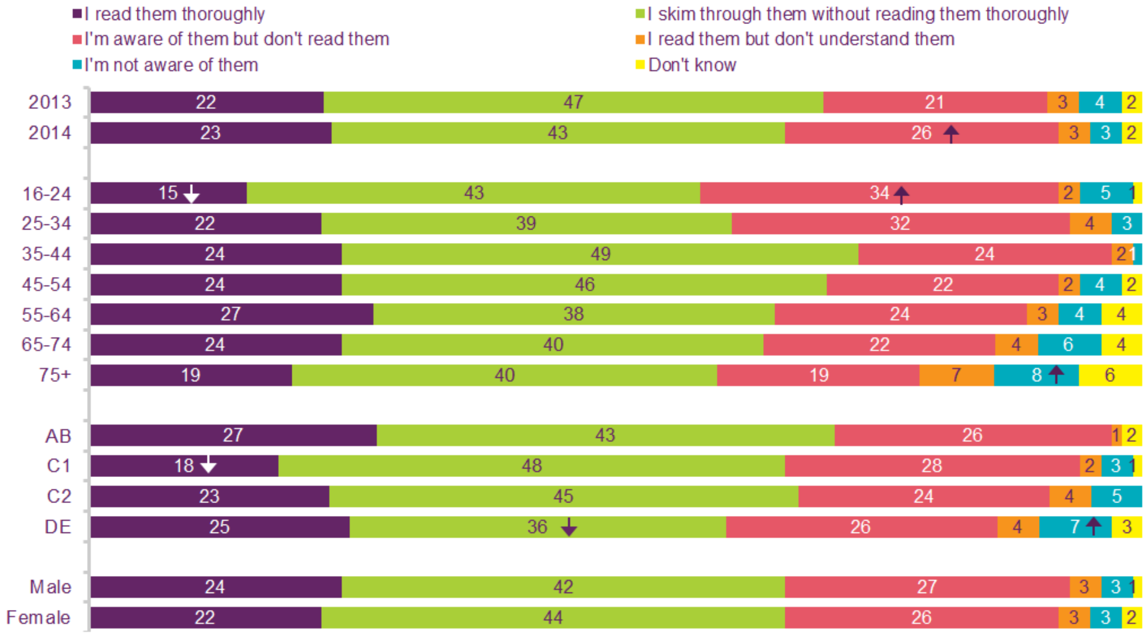
IN39 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure to enter these type of details?
Base: Adults aged 16+ who use the internet at home or elsewhere (1282 in 2009, varies by demographic)
Arrows show 1) significant changes (99% level) between 2013 and 2014, and 2) significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Adults are more likely than in 2013 to say they don't read website terms and conditions at all

We asked internet users the extent to which they are aware of, and read, website terms and conditions / privacy statements. Over nine in ten (95%) say they are aware of them, as was the case in 2013 (94%). However, they are more likely than in 2013 to say they are aware of them but do not read them at all (26% vs. 21% in 2013). No other response has changed to a statistically significant level since 2013, and it remains the case that most internet users either say they read website terms and conditions thoroughly (23%) or skim through them (43%).

No particular group of internet users is more likely to say they read website terms and conditions thoroughly, but 16-24s (15%) and C1s (18%) are less likely to say this than all internet users (23%). 16-24s (34%) are more likely than all users (26%) to say they are aware of them but do not read them at all, while those aged 75+ (8%) and DEs (7%) are more likely to say they are not aware of them. There are no differences by gender.

Figure 143: Attitudes towards website terms and conditions, by year and demographic group



IN42…Which of the following statements best describes what you do about website terms and conditions or privacy statements?
Base: Adults aged 16+ who go online at home using any device (1609 in 2014, varies by demographic)
Arrows show 1) significant changes (99% level) between 2013 and 2014, and 2) significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Most Facebook and Instagram users have made their profiles more private

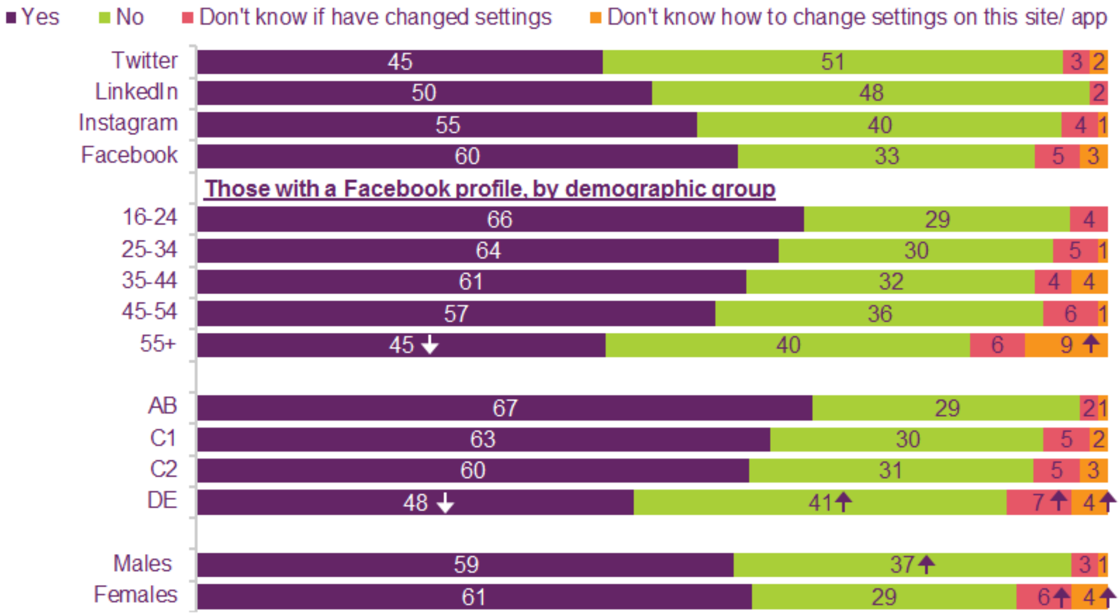
Internet users with an active page or profile on any of four popular social media sites or apps (Facebook, Instagram, LinkedIn and Twitter) were asked to say for each whether they had changed the privacy settings to be more private from the original default setting.

Figure 144 shows the findings for these four social media sites or apps as well as the demographic breakdown of responses from Facebook users (which has a higher base size than other social media). A majority of Facebook users (60%) and Instagram users (55%) say they have changed their privacy settings to make them more private. Around half of LinkedIn users (50%) have also done this, while this is less likely for those with a Twitter profile (45%).

Among Facebook users no demographic group is more likely to say they have changed their privacy settings to make them more private, but two groups are less likely to say this: those aged 55 and over (45% vs. 60%) and those in DE households (48% vs. 60%). Those in DE households (41% vs. 33% of all) and males (37% vs. 29% females) are more likely to say they have not changed the privacy settings to make them more private.

A small minority of Facebook users say they don't know how to do this (3%), with those aged 55 and over more likely than all Facebook users to say this (9%) and females are more likely than males (4% vs. 1%).

Figure 144: Whether changed social media settings of specific sites to be more private



IN29A-D. Have you changed the privacy settings to be more private from the original default setting for your Facebook/ Instagram/ LinkedIn/ Twitter profile

Base: Adult internet users aged 16+ with an active social networking site profile on Facebook (1057), Instagram (179), LinkedIn (139), Twitter (271) . Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Most Facebook users only share information with friends

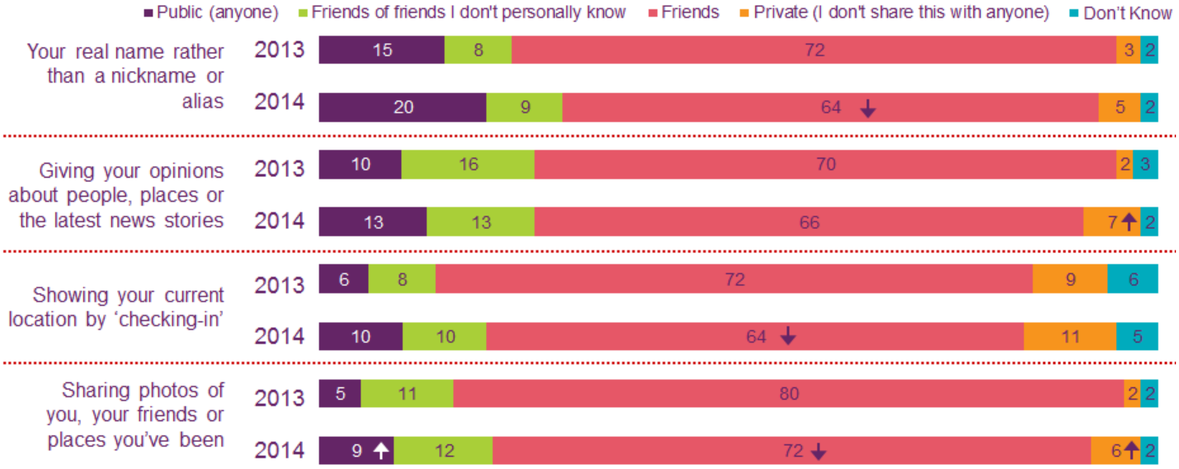
Facebook users were asked about four types of information, and who they share each type of information with. As shown in Figure 145, a majority only share each type of information with friends, rather than with a wider group including friends of friends, or with anyone.

Seven in ten (72%) say they only share their photos with friends. 'Friends only' was also cited by two-thirds of users in the case of sharing opinions about people, places or the latest news stores (66%), their real name (64%), and their current location (64%).

Since 2013, fewer Facebook users say they only share three of the types of information asked about with friends: their real name (64% vs. 72%), their current location (64% vs. 72%) and their photos (72% vs. 80%). While there has been an increase in sharing photos publically since 2013 (9% vs. 5%), this is not evident for the other types of information.

Two types of information appear less likely to be shared at all (i.e. posted privately) since 2013: opinions (7% don't share with anyone vs. 2% in 2013) and photos (6% vs. 2%).

Figure 145: Who share certain types of information with via Facebook: 2013 vs. 2014



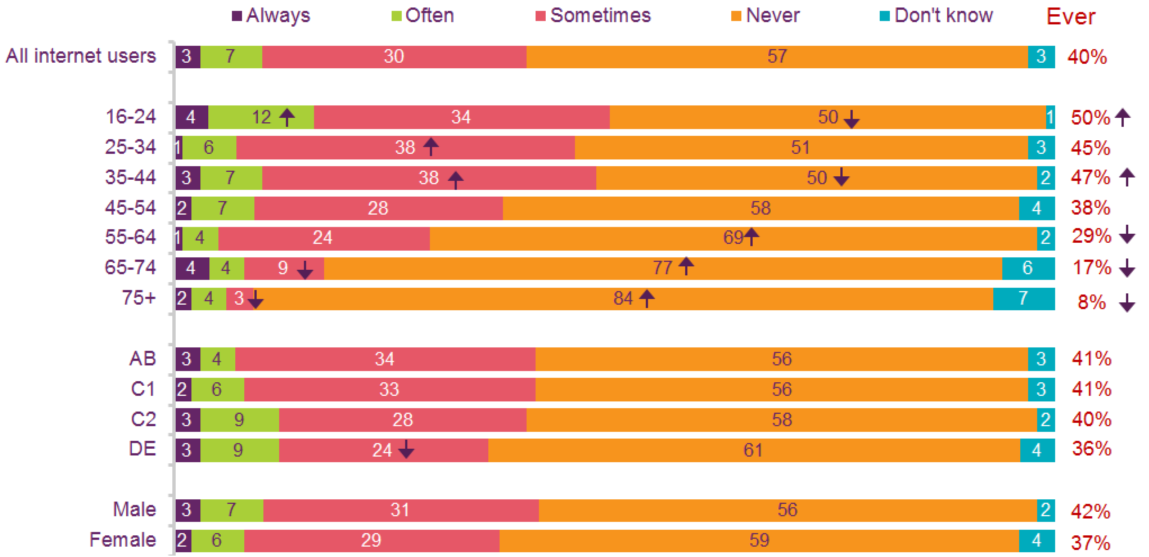
IN28A-D I'm going to read out some things you may do on Facebook, please tell me which one of these options applies in terms of who you share this type of information with
Base: Adult internet users aged 16+ with an active social networking site profile on Facebook – who say they undertake each activity (variable base) Arrows show significant changes (99% level) between 2013 and 2014.

Four in ten internet users say they ever give out inaccurate or false details online to protect their personal identity

Four in ten (40%) internet users say they ever give out inaccurate or false details on some websites to protect their personal identity online, as shown in Figure 146. This behaviour is more likely among 16-24s (50%) and 35-44s (47%), and less likely among users aged 55 and over (29% aged 55-64, 17% aged 65-74 and 8% aged 75+). Responses do not vary by socio-economic group or by gender.

One in ten internet users say they 'always' (3%) or 'often' (7%) give out inaccurate or false details online to protect their personal identity. This behaviour is most likely to be undertaken 'sometimes' (30%).

Figure 146: Extent to which "I give out inaccurate or false details on some websites to protect my personal identity online" applies, by demographic group

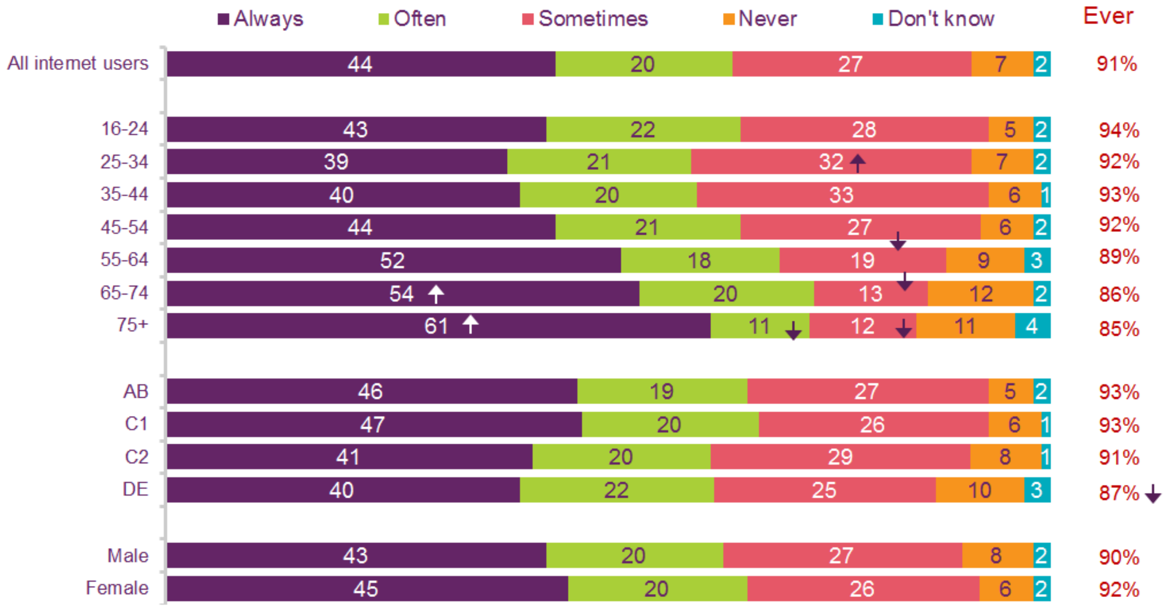


IN43A...."I give out inaccurate or false details on some websites to protect my personal identity online"
Base: Adults aged 16+ who go online at home using any device (1609 in 2014, varies by demographic)
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Nine in ten internet users ever give the minimum amount of personal info required

Nine in ten (91%) internet users say they ever (always, often or sometimes) give the minimum amount of personal information required online. As shown in Figure 147 users in the DE socio-economic group are less likely than all users to say they ever do this (87%), and users aged 65-74 (54%) and 75+ (61%) are more likely than all (44%) to say they 'always' give the minimum amount of personal information required online.

Figure 147: Extent to which "I only give the minimum amount of personal information required" applies, by demographic group



IN43B. "I only give the minimum amount of personal information required"
Base: Adults aged 16+ who go online at home using any device (1609 in 2014, varies by demographic.
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

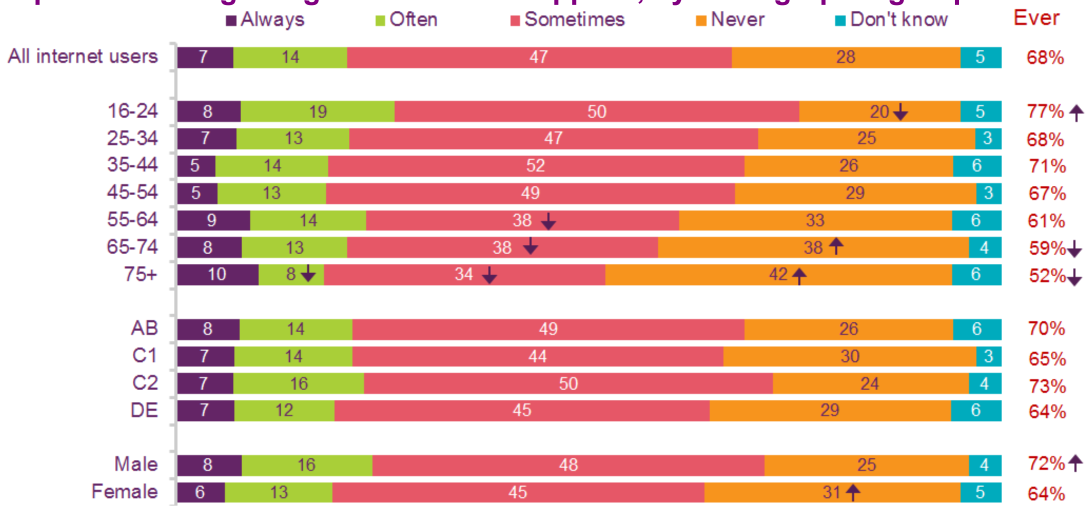
Most internet users say they are happy to provide their personal information online for something they want, while half say they don't really think about the personal information they provide at least sometimes

Close to seven in ten (68%) internet users say they are happy to provide personal information online to companies as long as they get what they want, as shown in Figure 148.

This attitude to providing personal information online is more likely among 16-24s (77%) and among men (72% vs. 64% women), and less likely among users aged 65 and over (59% aged 65-74 and 52% aged 75+). Most users in each age group, socio-economic group and gender say this is true for them at least sometimes.

Fewer internet users say they are 'always' (7%) or 'often' (14%) happy to provide personal information online to companies as long as they get what they want. This is most likely to be true for information provided 'sometimes' (47%).

Figure 148: Extent to which “I am happy to provide personal information online to companies as long as I get what I want” applies, by demographic group

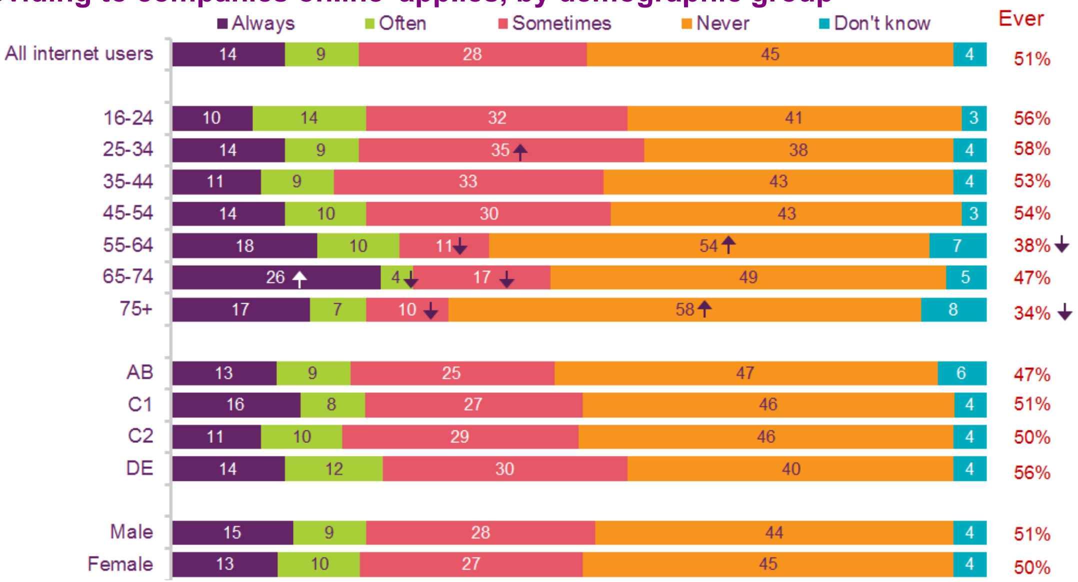


IN43C. “I am happy to provide personal information online to companies as long as I get what I want”
Base: Adults aged 16+ who go online at home using any device (1609 in 2014, varies by demographic)
Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Half (51%) of internet users say that – at least sometimes - they don’t really think about the personal information they are providing to companies online. As shown in Figure 149, there is no particular group more likely to say this. However, it is less likely among those aged 55-64 (38%) and aged 75+ (34%). Around half of users in each age group, socio-economic group and gender say this is true for them at least sometimes.

Fewer internet users say they ‘always’ (14%) or ‘often’ (9%) don’t really think about the personal information they are providing to companies online - it is more likely to be ‘sometimes’ (28%).

Figure 149: Extent to which “I don’t really think about the personal information I am providing to companies online”applies, by demographic group



IN43D. “I don’t really think about the personal information I am providing to companies online”
Base: Adults aged 16+ who go online at home using any device (1609 in 2014, varies by demographic). Arrows show significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

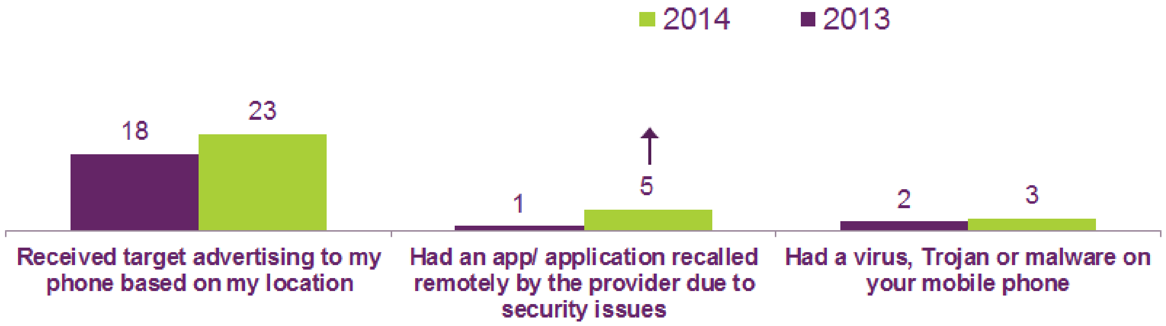
A quarter of mobile phone users say they've received targeted advertising

Since 2013 there has been an increase in mobile users saying they have received targeted advertising; rising from 18% to 23% as shown in Figure 150.

No particular age group is more likely to have received targeted advertising to their phone, but those aged 55 and over are less likely (13%), as are DEs (17%). Men are more likely than women to have received targeted advertising to their phone in the last 12 months (26% vs. 20%).

While very few mobile phone users have had an app recalled remotely by the provider due to security issues (5%), or have experienced viruses, trojans or malware on their mobile phone (3%), the former is more likely than in 2013 (1%).

Figure 150: Experience of issues from using mobile phones: 2013 vs. 2014



M4 – Which, if any, of the following things have happened to you as a result of using your mobile phone in the last 12 months? (prompted responses, multi-coded)
Base: Adults aged 16+ who use a mobile phone (1465 in 2013, 1670 in 2014). Significance testing shows any change between 2013 and 2014

6.9 Online safety and security

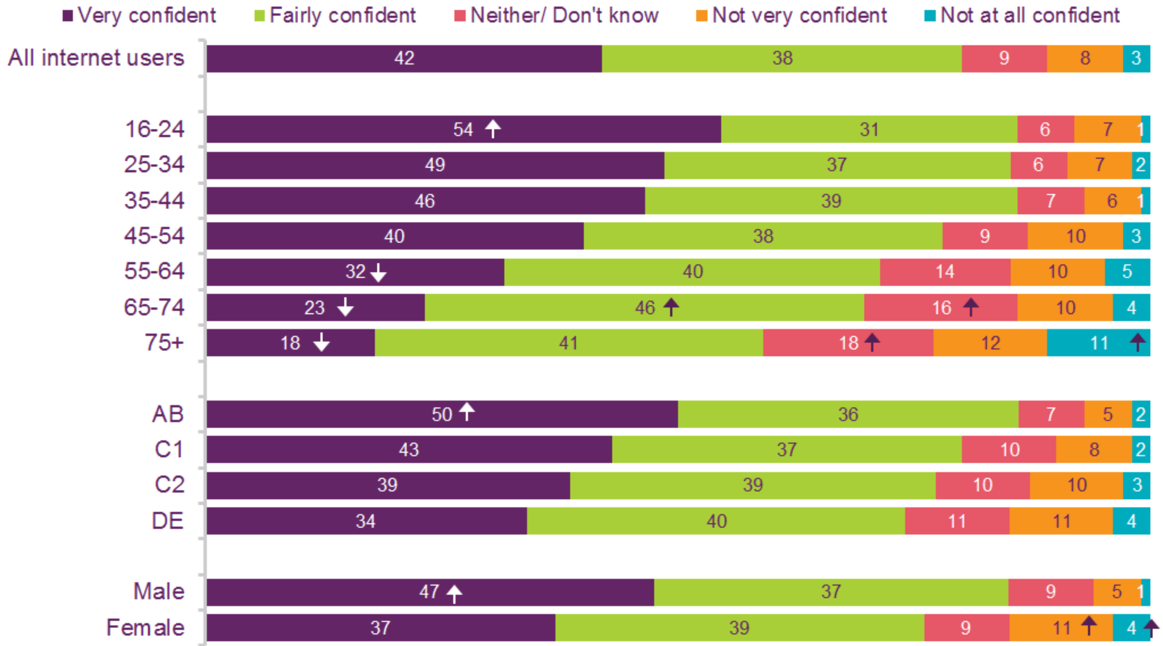
Fewer than half of internet users are 'very confident' they can stay safe online.

As already touched upon in Section 6.6, we introduced a question in 2014 assessing confidence in staying safe online. Across all internet users, eight in ten say they are at all confident (80%), which is split relatively evenly between 'very confident' (42%) and 'quite confident (38%).

As shown in Figure 151, those aged 16-24 (54%) are more likely than all internet users (42%) to say they are 'very confident' they can stay safe online, while those aged 55 and over are less likely (32% for 55-64, 23% for 65-74 and 18% for 75+).

ABs (50%) are more likely than DEs (34%), and males (47%) are more likely than females (37%) to be 'very confident.'

Figure 151: Confidence in staying safe online, by demographic group



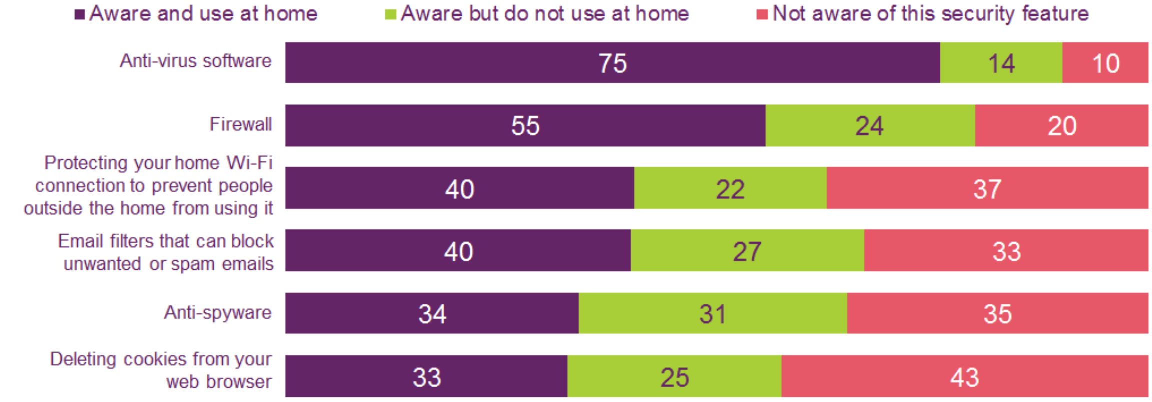
IN13D How confident are you that you can stay safe online?
Base: Adults aged 16+ who use the internet at home or elsewhere (1609 in 2014, varies by demographic)

The majority of internet users have security measures in place

As shown in Figure 152, the majority of internet users who go online at home are aware of each of the various measures and safety features they were asked about. The proportion who are 'aware and use' is higher for anti-virus software (75%) and firewalls (55%), but lower for home Wi-Fi protection (40%), email filters (40%), anti-spyware (34%) and deleting cookies from browsers (33%).

Use of each of the six security measures does not vary across the age groups, but it is more likely among ABs (95% use any vs. 88% of all) and males (91% vs. 85% females). It is less likely among those in DE households (78%).

Figure 152: Awareness and use of certain online security measures/ features



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 any of the devices you use to go online at home that are owned by you or a member of your household?
Base: Adults aged 16+ who go online at home using any device (1573)

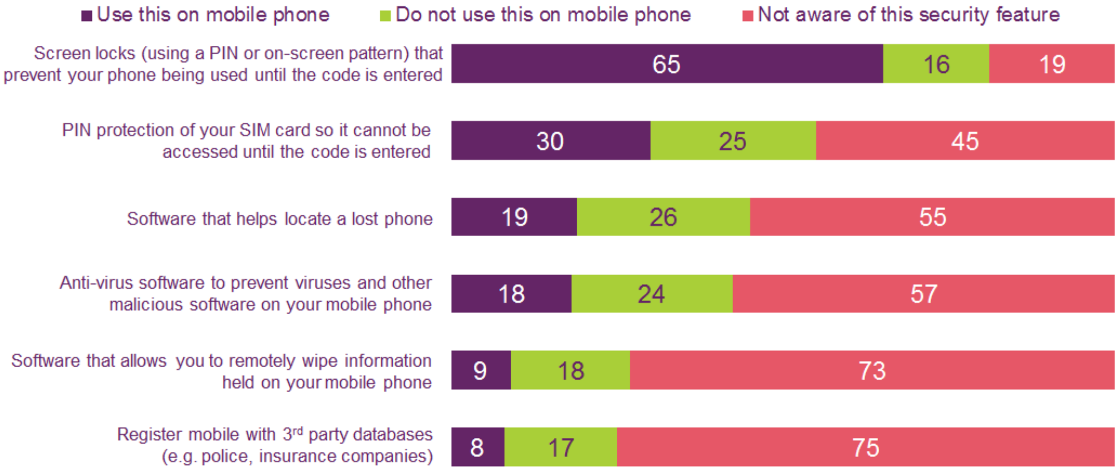
A minority use any mobile phone security measures beyond screen locks

As shown in Figure 153, the majority of mobile phone users (65%) say they use a screen lock (using a PIN or on-screen pattern) to prevent their phone being used. Far fewer say they use each of the other security measures and safety features that we asked about. Three in ten (30%) use PIN protection of their SIM card.

The proportion who use software to help locate a lost phone (19%) is similar to that of using anti-virus software on their phone (18%). One in ten use software to remotely wipe information held on their phone (9%) and have registered their phone with third-party databases (8%).

Mobile phone users aged 16-24 are more likely than all users to use each of the security measures, with the exception of anti-virus software. Results do not vary by socio-economic group or gender.

Figure 153: Awareness and use of mobile security measures/ features



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? Base: Adults aged 16+ who use a mobile phone (1670)

Six in ten internet users have experienced a negative online event in the last 12 months

All internet users were promoted with nine possible events and were asked to say which – if any – they had experienced in the last 12 months, as shown in Figure 154.

Half of all adults who go online (49%) have received spam/ unwanted emails from companies trying to sell to them in the last 12 months and one quarter have received emails or instant messages sending them to a 'phishing' site (25%) or have got a computer virus on a home PC, laptop or netbook (23%). All other 'negative' online activities that we asked about were experienced by around one in ten, or less.

Across the nine events shown in Figure 154, six in ten (62%) internet users had experience of any in the last 12 months. Any negative experience is more likely among users aged 35-44 (70% vs. 62%) and among those in AB households (69% vs. 62%), and less likely among those aged 65 and over (52% for 65-74 and 45% for 75+ vs. 62%) and those in DE households (55% vs. 62%). Overall experience does not vary by gender.

Figure 154: Experience of 'negative' online events in the past 12 months

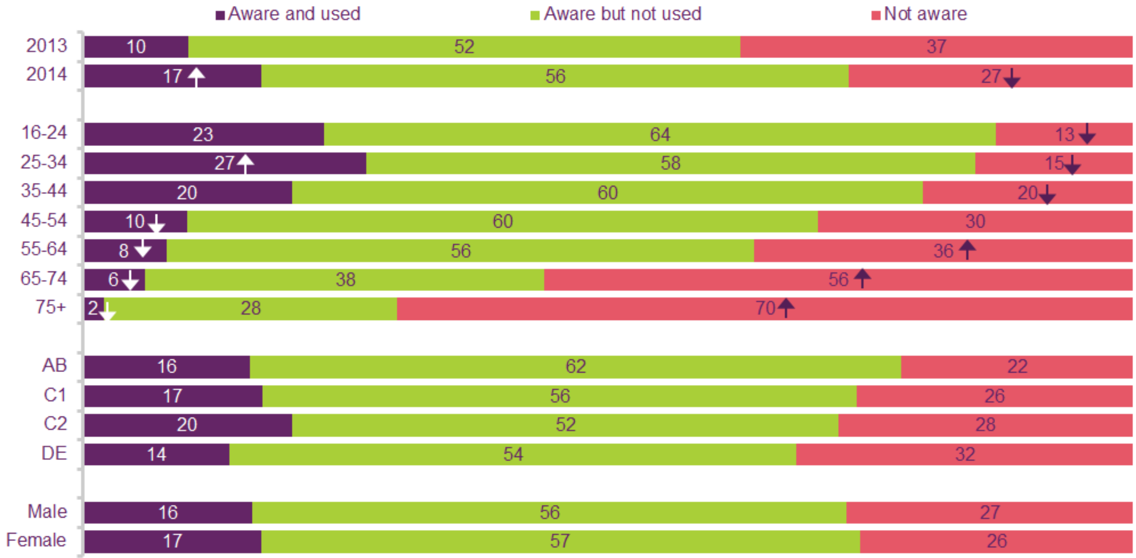
IN9 – Which, if any, of the following have you personally experienced in the last 12 months? (prompted responses, multi-coded)
Base: Adults aged 16+ who use the internet at home or elsewhere (1609 in 2014)

Awareness and use of reporting functions for inappropriate or offensive content have increased since 2013

The majority of internet users know how to report inappropriate or offensive content and a minority have done so in the past 12 months. As shown in Figure 155, the majority of internet users (73%) are aware that they can report inappropriate or offensive content on many websites and awareness has increased since 2013 (from 63%). While a minority of around one in five internet users (17%) have used the reporting function in the last 12 months, this also represents an increase since 2013 (from 10%).

Awareness of reporting functions is higher among those aged under 45 and lower among those aged 55 and over, with no variations by socio-economic group or gender. Use of reporting functions in the last 12 months is also higher among younger internet users (23% aged 16-24, 27% aged 25-34 vs. 17% of all) and lower among older internet users (10% aged 45-54, 8% aged 55-64, 6% aged 65-74 and 2% aged 75+ vs. 17% of all).

Figure 155: Awareness and use of reporting function: 2013 vs. 2014



IN30/ IN31 – If you were to see something online that you found inappropriate or offensive, are you aware that many websites and apps have a function to report this to the website? Have you reported anything in this way on a website or app in the last 12 months?
Base: Adults aged 16+ who go online at home using any device (1609 in 2014, varies by demographic)
Arrows show 1) significant changes (99% level) between 2013 and 2014, and 2) significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

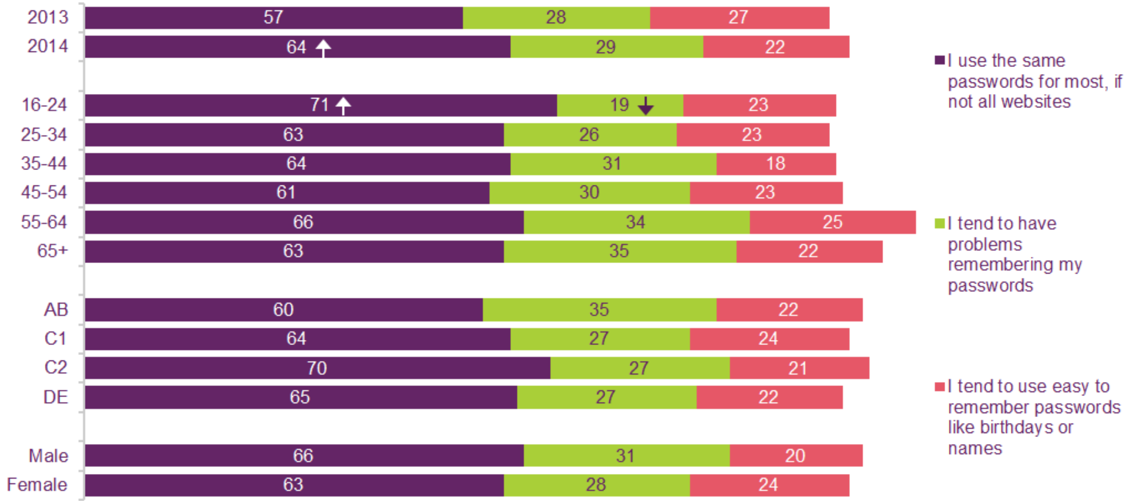
Two-thirds say they use the same passwords for most websites

Internet users were prompted with three statements about online passwords and were asked to select as many as applied. As shown in

Figure 156 shows that close to two-thirds (64%) of internet users use the same passwords for most, if not all, websites, an increase since 2013 (from 57%). This option was chosen by over half of users in each age group, socio-economic group and gender, and is not more or less likely among any particular group.

Three in ten (29%) users said they had problems remembering passwords, with this being less likely among users aged 16-24 (19%). One in five users (22%) said they tend to use easy-to-remember passwords like birthdays or names.

Figure 156: Attitudes towards online passwords



IN50: Which of these apply regarding the passwords that you use online?...
Base: Adults aged 16+ who go online at home using any device who say that any of these apply to them regarding the passwords they use online (1219 in 2014, varies by demographic).

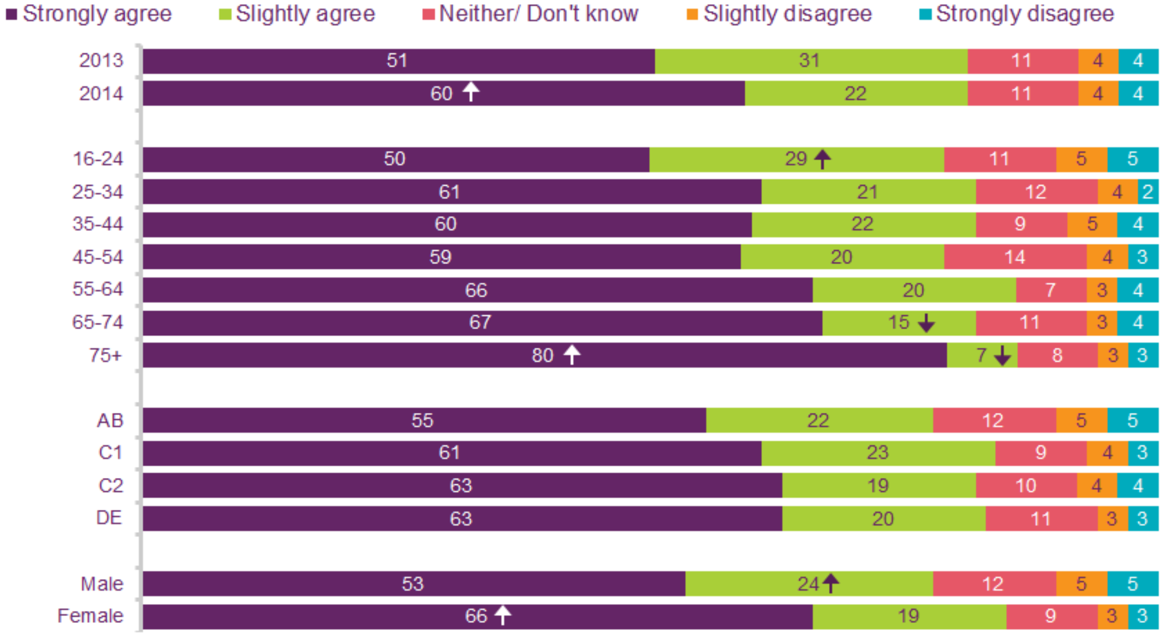
Most internet users believe that people must be protected from seeing inappropriate or offensive content

As context for understanding more about the levels of concern people have about media, we ask about the extent to which they feel it is necessary for there to be protection against inappropriate or offensive content.

Figure 157 shows the overall levels of agreement and disagreement among internet users. The majority feel that users should be protected from inappropriate or offensive content, and are more likely to strongly agree that this should be the case than in 2013 (60% vs. 51%).

Compared to all internet users (60%), those aged 16-24 (50%) are less likely to agree strongly with this statement. In contrast, those aged 75+ are more likely (80%). Women (66%) are more likely than men (53%) to agree strongly.

Figure 157: Extent agree with statement: "Internet users must be protected from seeing inappropriate or offensive content", by year and demographic group



IN35E:…"Internet users must be protected from seeing inappropriate or offensive content"
Base: Adults aged 16+ who go online at home using any device (1609 in 2014, varies by demographic)
Arrows show 1) significant changes (99% level) between 2013 and 2014, and 2) significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Most mobile phone users believe that people must be protected from receiving inappropriate or offensive content

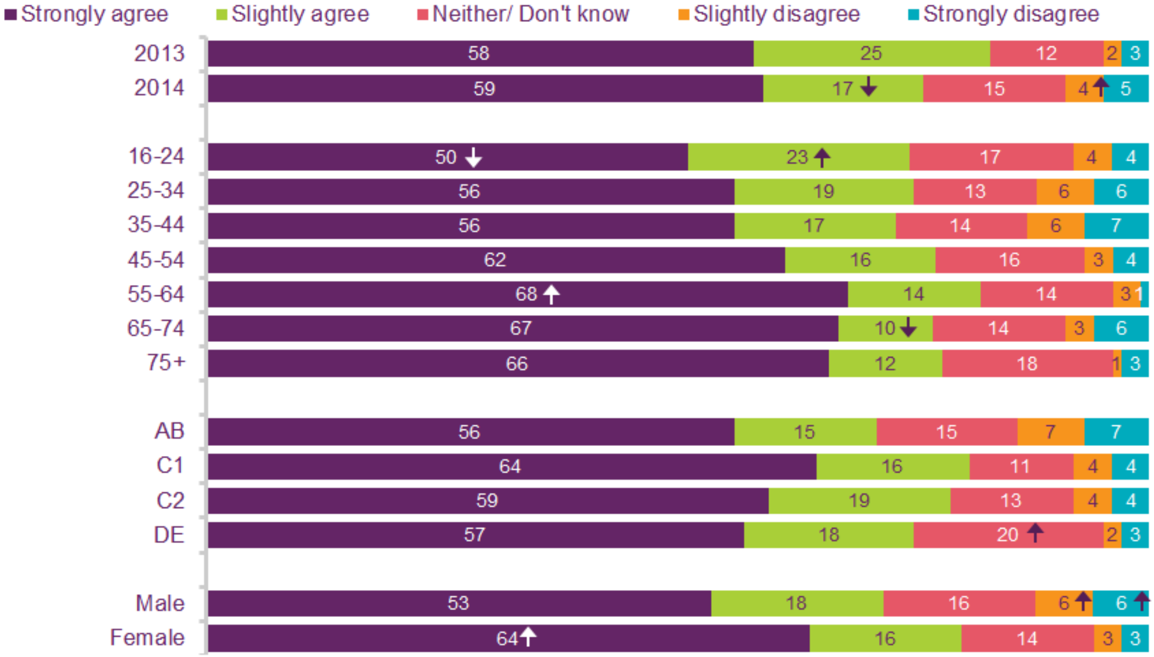
Similar to the question posed to internet users about protection from inappropriate or offensive online content, a similar question is asked to mobile phone users about content available on that particular type of device.

As shown in Figure 158, around three quarters (76%) agree (59% strongly, and 17% slightly) that mobile users must be protected from receiving inappropriate or offensive content on a mobile phone. While there has been no change since 2013 in those who agree strongly (59% vs. 58% in 2013), fewer say they agree slightly (17% vs. 25%).

A majority of all demographic groups agree with the statement, but there are some variations by age and by gender. Compared to all mobile users (59%), those aged 16-24 (50%) are less likely to agree strongly with this statement, while users aged 55-64 (68%) are more likely.

DEs (20%) are more likely than all mobile users to hold a neutral view (either neither or don't know), and women (64%) are more likely than men (53%) to agree strongly.

Figure 158: Extent agree with statement: "Mobile users must be protected from seeing inappropriate or offensive content", by year and demographic group



M8 – Please tell me the extent to which you agree or disagree with something that other people have said about mobile phones.
Base: All who use a mobile phone (1670 in 2014, varies by demographic)
Arrows show 1) significant changes (99% level) between 2013 and 2014, and 2) significant differences (95% level) for age / socio-economic group compared to all internet users, and males compared to females.

Section 7

Newer, narrow and non-users of the internet

7.1 Section overview

This section explores in detail the behaviour and attitudes of adults who are less familiar with using the internet. In addition to those who personally do not use the internet at all (non-users), we also categorise those who do use the internet through two dimensions:

- **Recency of take-up** i.e. when they first started using the internet. In particular we focus on those who say they first started using the internet less than five years ago - *newer* users.
- **Breadth of use** i.e. the number of activities they partake online. The main focus is on those who use between one and six categories of internet use, out of seventeen assessed. We term these *narrow* users.

We expand on the definitions used for each piece of analysis at the start of each sub-section, and then cover the following topics:

- The incidences and demographic profiles within the overall population of internet users.
- How the internet is used in terms of the volume and location of use, types of use made, experience of visiting sites that are new to them and the number of different websites visited.
- Confidence in using the internet and undertaking particular functions, their understanding of how search engines operate.
- The extent of any security concerns - whether they make a judgement about a website before entering personal information, attitudes towards sharing personal information online and experience of any negative events online in the past 12 months.
- Concerns about what can be seen online and the extent to which they believe that online content is regulated.

For *non-users* of the internet we explore the following:

- The incidences and demographic profiles within the overall adult population.
- The extent to which non-users have asked someone else to use the internet on their behalf (i.e. proxy use) in the past year.
- The extent to which non-users feel they will start to go online in the future.
- The perceived advantages of being online.

7.2 Key findings

Newer users

- Newer users are categorised as those who first went online less than five years ago. Just over a tenth (13%) of adults come under this category, though this is 22% of internet users aged 65+.

- A fifth (19%) are aged 65+, close to half (46%) are from the DE socio-economic group, and they are more likely to be women (59% vs. 52%).

- Newer users have a lower estimated weekly volume of use compared to established users (12.7 hours vs. 21.9 hours). This difference is due to a lower volume of use both at home and in the workplace/ place of education.

- While newer internet users are less likely to use alternative devices (devices other than a desktop computer/ laptop/ netbook) to go online, they are more likely than more established users to *only* use alternative devices to go online (19% vs. 4%).

- Newer users use the internet at least weekly for fewer activities – with only four activities undertaken weekly by more than three in ten newer users: general surfing/ browsing (68%), looking at social media sites/ apps (53%), sending/ receiving emails (51%) and using instant messaging (48%).

- Compared to established users, newer users are more likely to only use those websites they've visited before (52% vs. 27%) and to visit fewer different websites in a typical week (an average of five compared to seventeen for established users). They are also less likely to say they are confident internet users (66% vs. 91%).

- Newer users are less likely to say they make judgements about whether a website is secure before entering personal details (74% vs. 82%) and are less likely to enter personal details online due to security concerns. Awareness and use of online security measures/ safety features is lower among newer internet users.

- Concerns about what is on the internet are lower among newer users (42% vs. 53%) and newer users are more likely to believe that all or most online content is regulated (39% vs. 29%).

Narrow users

- There is a significant degree of overlap between newer and narrow internet users for older adults and DE adults, with newer users more likely to be narrow users of the internet. Narrow users are defined as those who carry out 1-6 of 17 types of online activity, and they comprise one in ten (11%) of all internet users. This is a decrease since 2013[57] (17%),

- Given the definition of narrow users, it is understandable that they are less likely to undertake certain activities online, compared to all users. They are, however,

[57] While comparisons are made to 2013 these are indicative only as prior to 2014 there were 18 types of use that were used to segment internet users into Narrow users (1-6 types) , Medium users (7-10 types) and Broad users (11-18 types). The activity 'Online gambling' was removed from the 2014 study. It is also worth noting that the individual online activities that make up each type of use have changed over time; however, the types of use have maintained as much consistency as possible over time.

considerably less likely than all internet users to use the internet for uploading/ adding content to the internet (6% vs. 66%), for watching video clips (16% vs. 73%), for music (5% vs. 61%) and for downloading software (5% vs. 60%).

- Narrow users are more likely to stick to ‘tried and tested’ websites and are less likely to say they use websites they haven’t visited before in a typical week. Three in four narrow users say they visit fewer than five different websites per week, compared to one in four of all internet users (75% vs. 26%).

- In terms of making judgements about websites, narrow users are more likely not to trust websites to be secure and less likely to say they would make a judgement about a website.

- Narrow internet users are no more likely to have concerns about online content. They are more likely to be unsure about the extent to which online content is regulated and less likely to be aware that only some online content is regulated

Non-users

- Fourteen per cent of adults in the UK are non-users of the internet. Six in ten (62%) of all non-users are aged 65 and over and half (50%) are in DE households.

- As in 2013, three in ten non-users (31%) have asked someone else to use the internet on their behalf in the last 12 months.

- One in ten non-users (10%) say they will start to go online in the next year or so.

- A majority of non-users (52%) do not think there are any advantages to them being online – although one in three (34%) can see any benefit and recognise at least one advantage to being online.

7.3 Newer internet users

Defining internet users by recency of use

This sub-section looks in detail at 'newer' users of the internet. Ideally, newer users of the internet would be those who first started going online in the last couple of years. However, there is also the need to ensure that any group of newer users has an adequate sample size (at least 100 respondents) in order to enable comparison against those who are more established internet users.

In 2014, 4% of internet users first started going online in the last 1 to 2 years (63 respondents), with a further 8% first going online in the last 3 to 4 years (123 respondents). Newer internet users are therefore defined as those who first started using the internet up to five years ago, with those who first started using the internet five or more years ago defined as 'established' users.

Incidence of newer users within the online population

Older adults, DEs and females are more likely to be newer users, and there has been no change in the incidence or demographic profile since 2013.

Across all UK adult internet users, just over a tenth (13%) are newer users with the remaining 87% established internet users. While not shown in Figure 159, a majority of internet users (59%) say they first started using the internet ten or more years ago. There has been no change in these incidences compared to 2013.

As shown in Figure 159, more than one in five internet users aged 65 and over (22% for both 65-74s and 75+) are newer users compared 13% of all UK adult users. No other age group are more or less likely to be newer users of the internet.

Those in the DE socio-economic group are more likely to be newer users (25% vs. 13%) while ABs are less likely (3% vs. 13%). Women (14%) are more likely than men (11%) to be newer users.

Figure 159: Proportion of newer and established users, by year and age

IN5 How long ago did you first start going online (Prompted responses, single coded)
Base: All adults who go online at home or elsewhere (1609 in 2014, varies by demographic)
Arrows show significant differences (95% level) for age compared to all internet users.

Demographic profile of newer versus established users

Newer internet users are more likely to be DE, female and aged 65+

Figure 160 compares the age, socio-economic group and gender profile of new and established internet users.

More than twice as many newer users (46%) are in the DE socio-economic group compared to more established users (20%). Newer users are also more likely to be women (59% vs. 50% for established users) and aged 65+ (19% vs. 11%).

While not shown in Figure 160, the profile of newer users is unchanged since 2013.

Figure 160: Demographic profile of newer vs. established users

	All internet users	Newer users (last 1-4 years)	Established users (5 years+)
Base	1609	226	1318
Aged 16-24	15%	16%	16%
Aged 25-34	20%	17%	21%
Aged 35-44	22%	18%	23%
Aged 45-54	17%	15%	16%
Aged 55-64	13%	14%	14%
Aged 65-74	9%	14%	8%
Aged 75+	3%	5%	3%
AB	28%	7%	31%
C1	31%	24%	32%
C2	18%	22%	17%
DE	24%	46%	20%
Male	48%	41%	50%
Female	52%	59%	50%

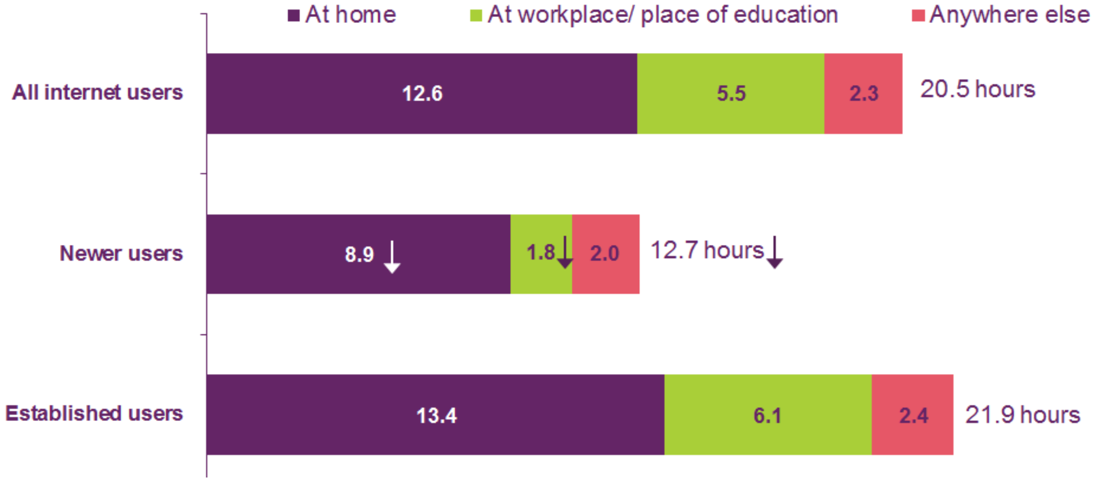
Newer users have a lower overall volume of internet consumption and are more likely to only use a device that isn't a computer to go online

As shown in Figure 161, newer users have a lower estimated weekly volume of use compared to established users (12.7 hours vs. 21.9 hours). This difference is due to a lower volume of use at home (8.9 vs. 13.4 hours) and in the workplace or place of education (1.8 vs. 6.1 hours).

A third (33%) of newer users only use the internet at home and not anywhere else, compared to around a fifth (18%) of the more established users. Six in ten newer users use the internet both at home and elsewhere, whereas this applies to eight in ten established users (60% vs. 80%). While one in twenty newer users use the internet only outside the home, this is higher than the incidence among more established users (6% vs. 2%).

Newer users are less likely than established users to use an alternative to a desktop computer, laptop or netbook (whether a mobile phone, portable media player, games console or player, e-book reader, smart TV, tablet computer or wearable technology) to go online at home or elsewhere (67% vs. 83%). However, newer users are nearly five times more likely than established users to only use an alternative to a desktop computer, laptop or netbook (19% vs. 4%).

Figure 161: Volume of internet use per week: newer vs. established users



IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
Base: All adults aged 16+ who go online at home or elsewhere (1609 aged 16+), those who first used the internet under 5 years ago (226), 5+ years ago (1318).

Newer users are less likely to use the internet at least once a week for the majority of activities

Figure 162 show the percentage of newer and more established users who use the internet at least once a week for each of the 32 individual activities asked about.

Compared to more established internet users, newer internet users are less likely to go online at least weekly for nineteen of the thirty two activities. The greatest differences in percentage points (pp) between newer and more established users are:

- Sending or receiving emails (33pp)
- Banking or paying bills online (27pp)
- Looking at news websites or apps (24pp)

The majority of newer users do three activities, as follows:

- General surfing/browsing (68%)
- Looking at social media sites/apps (53%)
- Sending/receiving emails (51%)

Figure 162: Weekly internet activities: newer vs. established users

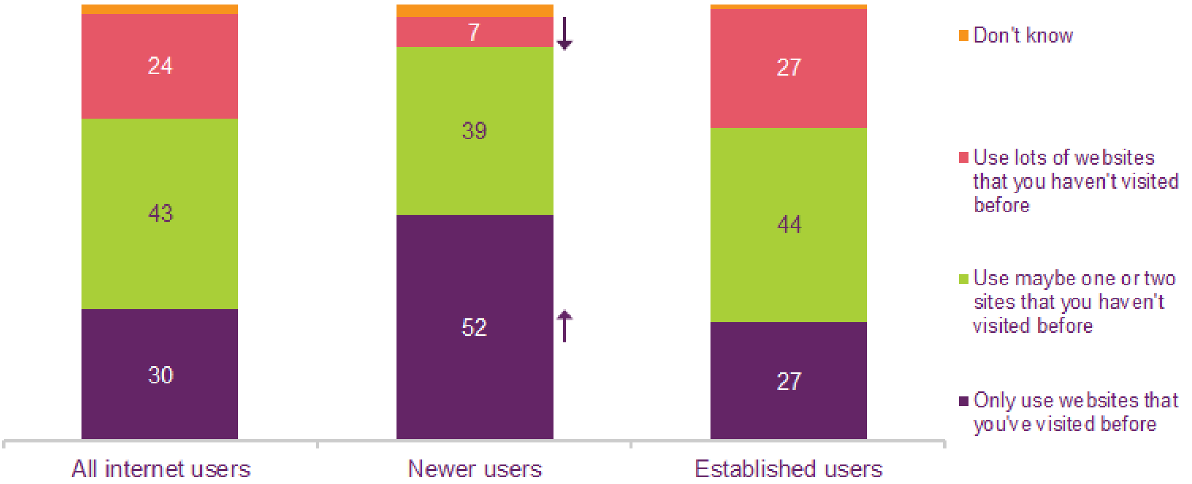
	All internet users	Newer users	Established users
Base	1609	226	1318
General surfing/ browsing	86%	68% ↓	88%
Sending/ receiving emails	79%	51% ↓	84%
Looking at social media sites/ apps	64%	53% ↓	65%
Using Instant Messaging	58%	48% ↓	60%
Finding info. for work/ job/ studies	45%	28% ↓	48%
Banking/ paying bills online	42%	19% ↓	46%
Looking at news websites/ apps	42%	21% ↓	45%
Watch/ download short clips (YouTube)	39%	24% ↓	41%
Finding info. for leisure (cinema etc.)	30%	15% ↓	33%
Share links to online articles (Twitter etc)	30%	24%	31%
Listen/ download music	29%	22% ↓	30%
Watch/ download TV prog's/ films	27%	16% ↓	29%
Buying things online	25%	16% ↓	27%
Make/ receive calls Skype/ FaceTime	22%	17%	23%
Playing games online	22%	22%	22%
Upload/ share videos or photos	22%	15% ↓	23%
Comments on website or blog	19%	10% ↓	21%
Finding info. public services	18%	9% ↓	19%
Looking at job opportunities	17%	15%	17%
Looking at sites for news/ events in area	17%	7% ↓	18%
Finding health-related info.	16%	10% ↓	17%
Downloading software	14%	6% ↓	15%
Listening to radio stations online	13%	11%	14%
Fill in form/ application online	13%	9%	14%
Look at political/ campaign/ issues sites	11%	7%	12%
Selling things online	8%	7%	8%
Maintain a website or blog	8%	3% ↓	9%
Complete government processes	8%	4%	8%
Online course to achieve a qualification	7%	6%	7%
Looking at adult-only websites	5%	4%	5%
Sign an online petition	4%	3%	4%
Contact a local councillor or your MP online	2%	2%	2%

IN15/ 16 – Could you please tell me from this list the types of things you currently do online, and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1609), started using under 5 years ago (226), 5+ years ago (1318).

Newer users are more likely to use only those sites they've visited before

In most weeks when the internet is used, newer users (52%) are almost twice as likely as established users (27%) to say that they only use websites they have visited before. Thus they are much less likely than more established users to say they use lots of websites they haven't visited before (7% vs. 27%).

Figure 163: Visits to websites not visited before: newer vs. established users



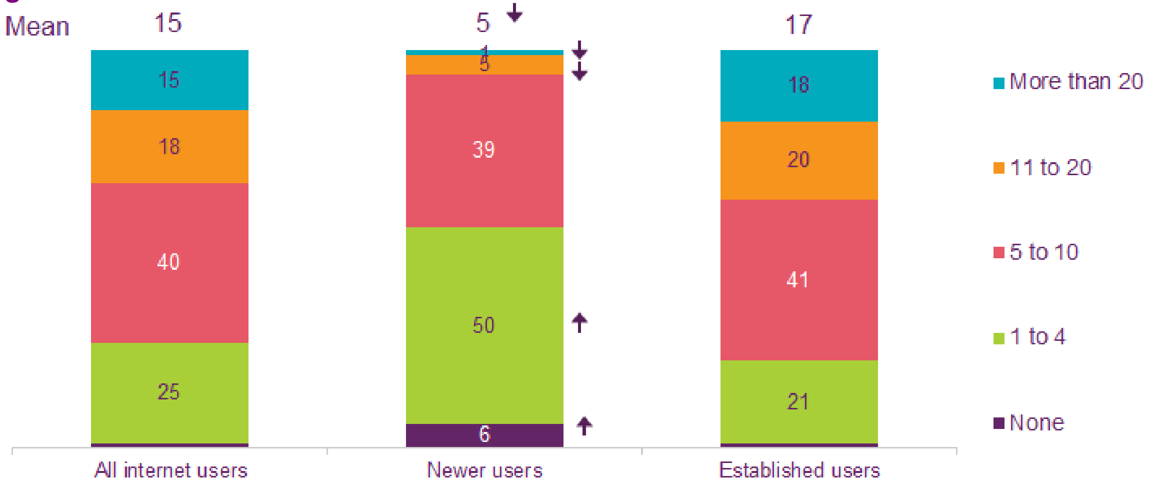
IN14 – In most weeks when go online, would you say that you…
Base: All adults aged 16+ who go online at home or elsewhere (1609), started using under 5 years ago (226), 5+ years ago (1318).

Newer users claim to visit fewer websites than established users per week

In a typical week, newer users estimate that they visit five different websites; lower than the 17 different websites that established internet users estimate they visit. This is shown in Figure 164.[58]

More than half of newer users visit fewer than five websites in a typical week, compared to one in five more established users (55% vs. 21%). Newer users are much less likely than more established users to say they visit more than ten different websites (6% vs. 38%).

Figure 164: Number of different websites visited a week: newer vs. established users



IN19 - Thinking now about all the different websites that you visit in a typical week for whatever purpose, whether that's at work, at home or elsewhere? How many different websites would you say you visit in a typical week?
Base: All adults aged 16+ who go online at home or elsewhere (1609), started using under 5 years ago (226), 5+ years ago (1318).

[58] Because these estimates are self-reported it is likely that a degree of under- and over-reporting will be present, and the estimates shown should be taken as indicative only.

Confidence as an internet user

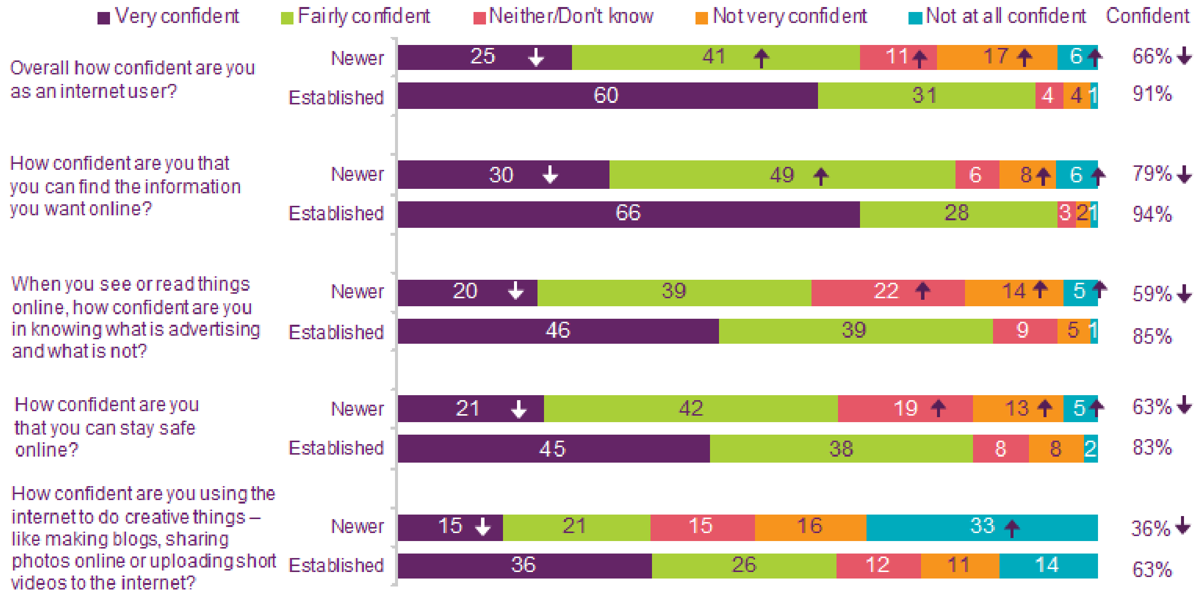
Newer users are less confident in their use of the internet

Figure 165 shows the self-reported ratings of confidence across the different aspects of using the internet, given by newer users and more established users. For each aspect, newer users are less likely to describe themselves as confident, and more likely to describe themselves as not confident (either not very, or not at all confident).

Three in ten newer users rate themselves as 'very confident' in finding the information that they want online (30% vs. 66%) with one in five 'very confident' that they can stay safe online (21% vs. 45%) or very confident they are aware of what online content is advertising (20% vs. 46%). Around one in seven newer users say they are 'very confident' using the internet to do creative things (15% vs. 36%).

Compared to newer users, more than twice as many more established users say they are 'very confident' internet users (60% vs. 25%).

Figure 165: Confidence as an internet user: newer vs. established users



IN13A-E – 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.
Base: All adults aged 16+ who started using under 5 years ago (226), 5+ years ago (1318).

Understanding search engines results

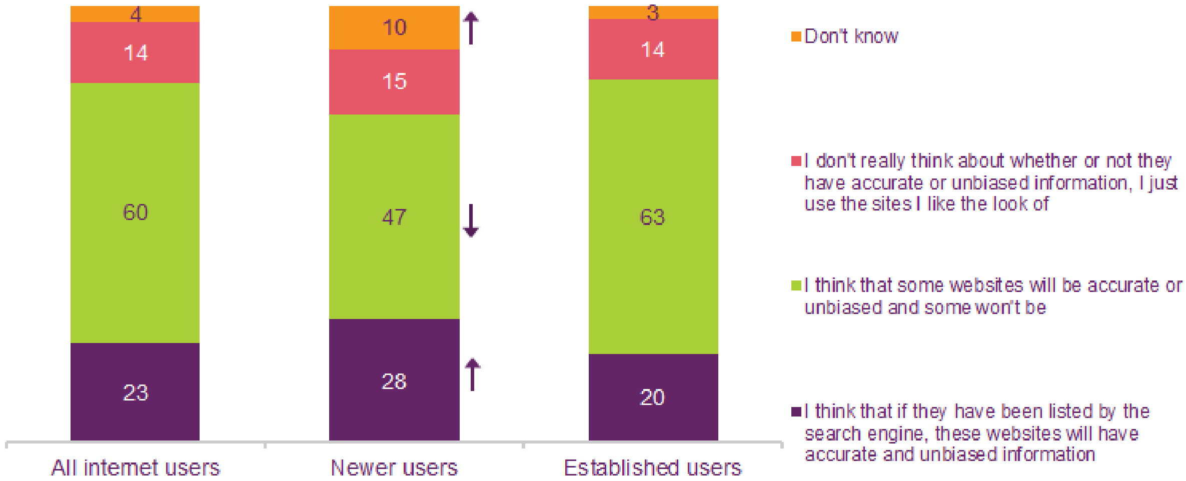
Newer users are less likely to 'understand' how search engines operate

Adults who ever use search engines (88% of newer users, 97% of more established users) were asked to say which of the following statements was closest to their own opinion:

- "I think that if they have been listed by the search engine, these websites will have accurate and unbiased information."
- "I think that some of the websites will be accurate or unbiased and some won't be."
- "I don't really think about whether or not they have accurate or unbiased information, I just use the sites I like the look of."

Figure 166 shows that, compared to more established internet users (63%), newer users are less likely to say that some websites will be accurate or unbiased and some won't be (47%). Instead, newer users are more likely than more established internet users to think that if listed by the search engine then the results will have accurate and unbiased information (28% vs. 20%) or are uncertain (10% vs. 3%).

Figure 166: Opinions on search engine accuracy: newer vs. established users



IN45 – When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages?
Base: All adults aged 16+ who go online at home or elsewhere (1609), started using under 5 years ago (226), 5+ years ago (1318).

Security concerns about providing personal information

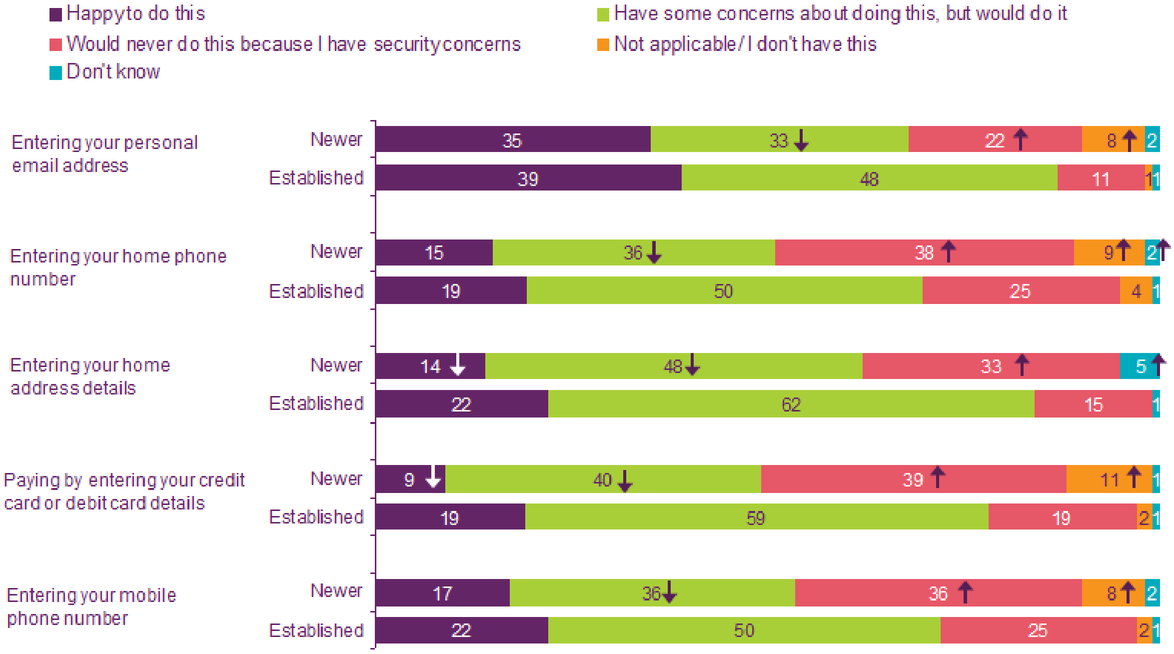
Newer users are more likely to say they would never enter personal details online because they have security concerns

Figure 167 compares the responses from newer and more established users in terms of the extent to which they say they would have any security concerns about providing five types of personal information online, perhaps when making an online payment or registering online. In each case, newer users are more likely than more established users to say they would never provide that information online due to security concerns.

Compared to more established users, newer users are also less likely to say they would be happy to enter their home address details (14% vs. 22%) and to be happy entering their credit or debit card details (9% vs. 19%).

Newer users are less likely than more established users to use the internet for transactions at least weekly (28% vs. 58%), which might account for some of the differences shown in Figure 167. Newer users may be more likely to have concerns because they lack experience with transacting online, or they may be less inclined to transact online because they have these concerns.

Figure 167: Personal details prepared to enter online: newer vs. established users



IN38A-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.
Base: All adults aged 16+ who go online at home or elsewhere (1609), started using under 5 years ago (226), 5+ years ago (1318).

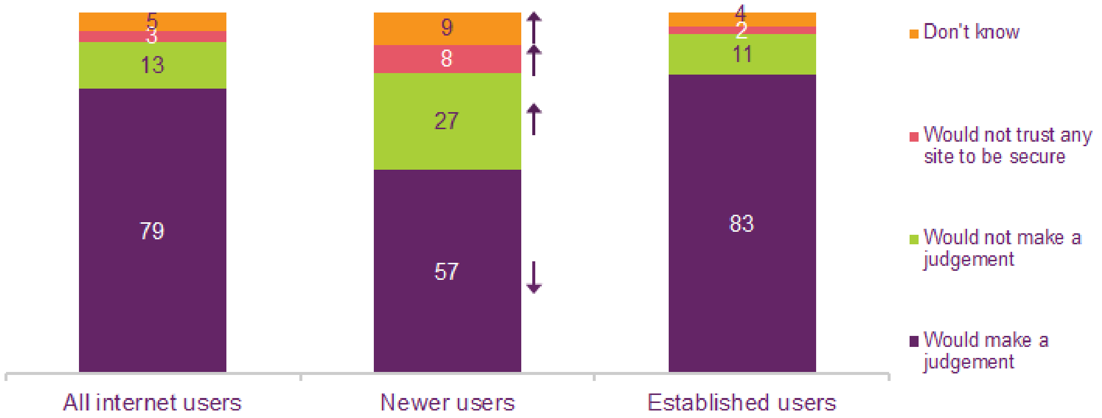
Judgements made about websites

Newer users are less likely to make a judgement about whether a site is secure

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

Figure 168 shows that newer users (57%) are less likely than more established users (83%) to say they would make a judgement about a website. They are, however, also more likely than established users to say they would not trust any site to be secure (8% vs. 2%) and to say they are unsure whether they would make any checks (9% vs. 4%).

Figure 168: Judgements made before entering personal details: newer vs. established users



IN39 – Could you tell me whether you would make a judgement about a website before entering these types of details? (Your home address or phone number, your credit or debit card details, and so on) How would you judge whether a website is secure to enter these type of details? Base: All adults aged 16+ who go online at home or elsewhere (1609), started using under 5 years ago (226), 5+ years ago (1318).

Online security measures and safety features

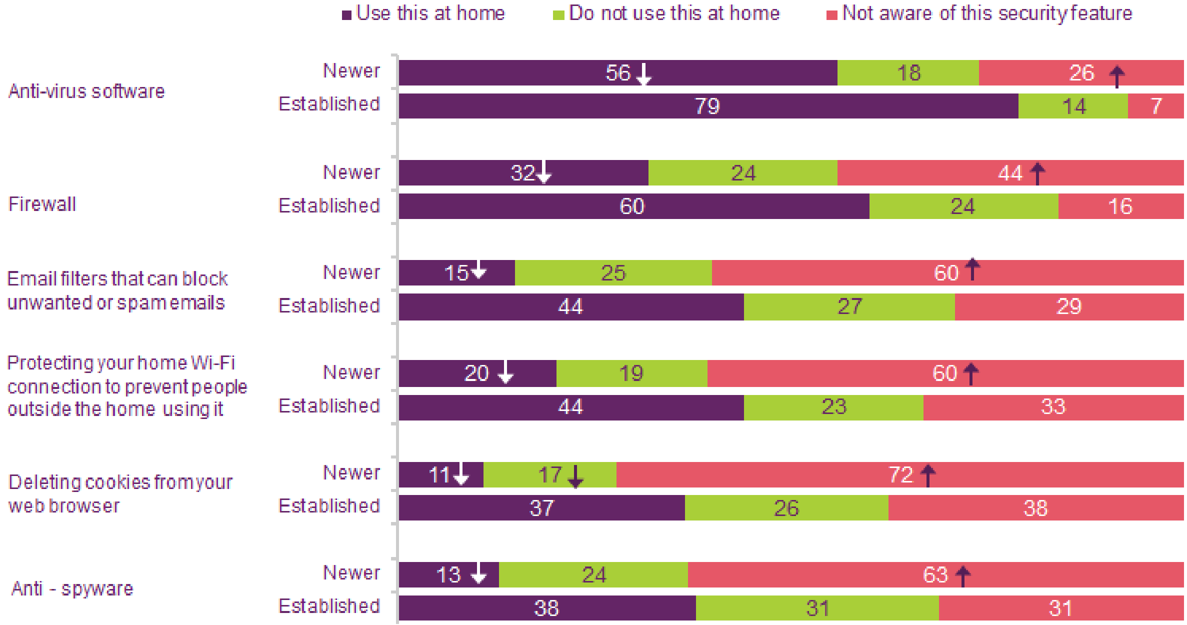
Awareness and use of online security measures or safety features is lower among newer internet users

Awareness and use of all six security measures or safety features asked about are lower for newer users than for more established users.

While a majority of more established users are aware of all six security measures or safety features, a majority of newer users are only aware of two features: anti-virus software (74%) and firewalls (56%).

Just one of the six features - anti-virus software (56%) - is in use by the majority of newer users.

Figure 169: Security measures installed on devices: newer vs. established users



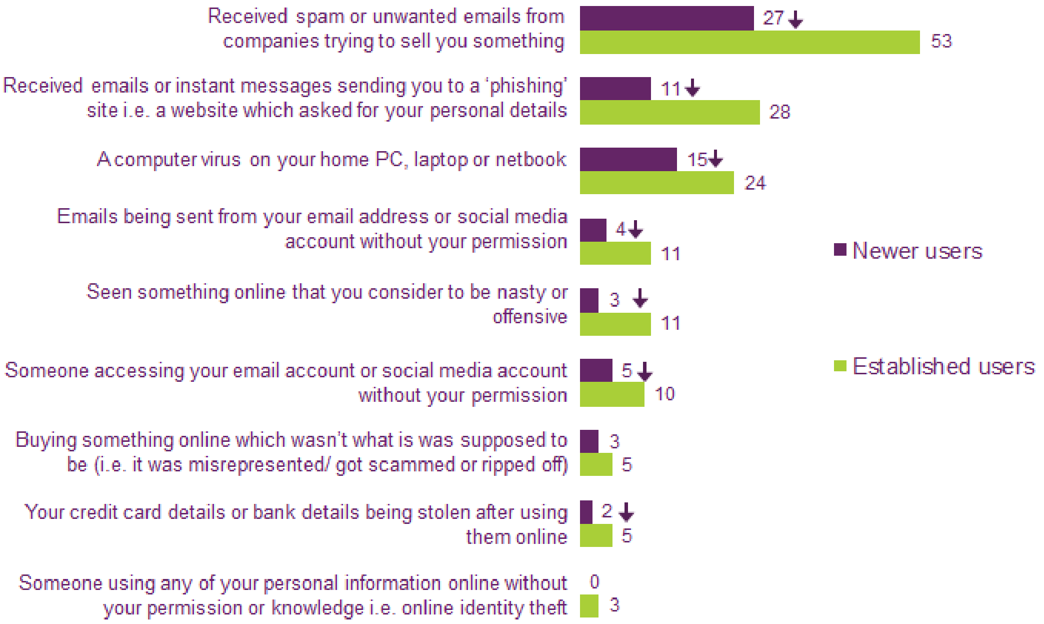
IN7 / IN8 Before today, which, if any, of the following online security measures or safety features had you, heard of? And which if any, of those measures or features do you have or use on any of the devices you use to go online at home?
Base: Adults aged 16+ who go online at home, 211 first used the internet under 5 years ago, 1301 first used the internet 5 or more years ago.

Experience of negative online events in the past 12 months

Newer users are less likely to say they have experienced some of the 'negative' events in the past 12 months

Figure 170 shows that newer users are less likely than more experienced users to say they have experienced seven of the nine 'negative' events asked about, in the past 12 months. For example, they are much less likely to have experienced, spam or unwanted emails (27% vs. 53%), or to have received emails or instant messages sending them to a 'phishing' site (11% vs. 28%).

Figure 170: Experience of negative types of online activity: newer vs. established users



IN9 – Which, if any, of the following have you personally experienced in the last 12 months?
Base: All adults aged 16+ who go online at home or elsewhere (226 first used the internet under 5 years ago, 1318 first used the internet 5 or more years ago).

Concerns about the internet

Newer users are less likely to have concerns about what is on the internet

Figure 171 shows that newer users are less likely than more established users to have any concerns about what is on the internet; it applies to four in ten newer users (42%), compared to a majority of more established users (53%).

There are, however, no differences between newer and more established internet users in terms of the specific type of concerns about what is online. Three in ten newer users have concerns relating to offensive or illegal content (31% for newer users vs. 39% for more established users), with around one in four concerned about security or fraud (23% vs. 21%) and the risks to others or to society (23% vs. 29%)

Figure 171: Concerns about the internet: newer vs. established users

IN34 – Can you tell me if you have any concerns about what is on the internet? Base: All adults aged 16+ who go online at home or elsewhere (226 first used the internet under 5 years ago, 1318 first used the internet 5 or more years ago

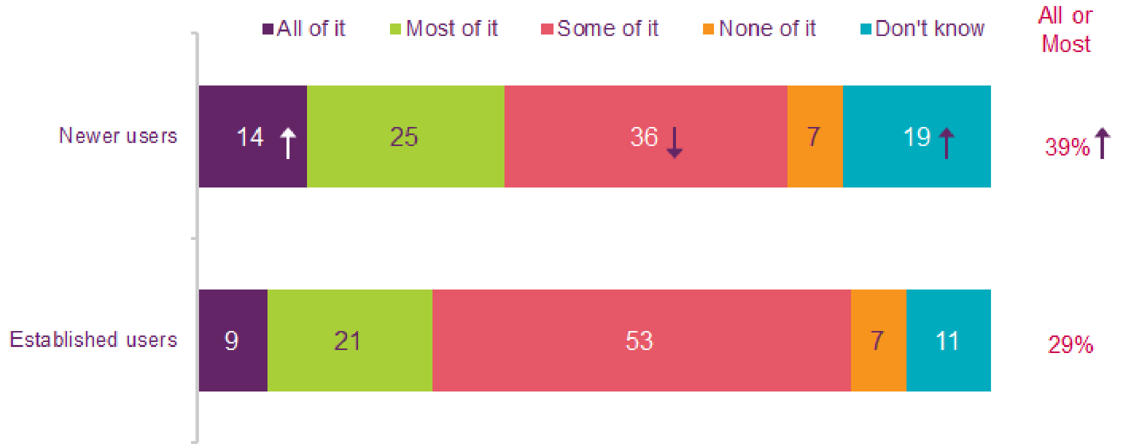
Online regulation

Newer users are more likely to say that all of what can be seen or read online is regulated

Figure 172 shows that newer users (39%, 14% for all and 25% for most) are more likely than established users (29%) to say that all or most of what can be seen or read online is regulated, and they are also more likely to be unsure (19% vs. 11%).

While around half of established internet users give the correct response that some of what can be seen or read online is regulated (53%), this is less likely among newer internet users (36%).

Figure 172: Opinion on much of what can be seen or read online is regulated: newer vs. established users



IN36. As far as you know, how much of what can be seen or read online is regulated? By regulation we mean rules and guidelines that must be followed when putting things online
Base: All adults aged 16+ who go online at home or elsewhere (226 first used the internet under 5 years ago, 1318 first used the internet 5 or more years ago).

7.4 Narrow internet users

Defining internet users by breadth of use

In order to assess the breadth of use of the internet, 30 of the 32[59] individual internet activities referenced in 2014 were grouped into 17 types 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 17 types of use they ever make.

This division into narrow, medium and broad users is achieved by dividing equally the frequency counts for the 17 categories of use into the three 'breadth of use' groups. Narrow users were defined as those ever carrying out 1-6 of the 17 types of online use, medium users ever carry out 7-10 types, and broad users ever carrying out 11-17 types.

The 17 types of use are detailed below:

1. **Information (personal)** – finding information for leisure time, looking at news websites or apps or adult-only websites, looking at websites for news about, or events in your local area or the local community
2. **Email -** sending and receiving emails
3. **Buying and selling -** buying and selling things online
4. **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
5. **Information (work / college / school) –** finding information for work/ job/ studies, doing an online course to achieve a qualification or looking at job opportunities
6. **Health -** finding information about health related issues
7. **Banking/ paying bills -** banking and paying bills online
8. **Social Media -** looking at social media sites or apps or sharing links to websites or online articles- perhaps on Twitter, Facebook, Reddit or LinkedIn
9. **Downloading software**
10. **Communications -** using Instant Messaging or making or receiving telephone or video calls over the internet (e.g. Skype)
11. **Watching video clips –** watching online or downloading short video clips such as music videos or comedy clips
12. **Music -** listening to or downloading music online
13. **Watching TV content –** watching online or downloading TV programmes or films
14. **Radio –** listening to radio stations online
15. **Civic involvement –** looking at political or campaign or issues websites, sign an online petition or contact a local councillor or your MP online
16. **Games –** playing games online
17. **Uploading/ adding content to the internet –** setting up or maintaining a website or blog or uploading or sharing videos or photos online or contributed comments to a website or blog

[59] The activities 'General surfing/ browsing the internet' and 'filling in a form or application online' have not been included in the definition of breadth of use, as it does not give us an indication of what type of use is being made by the user.

Incidence of Narrow users within the online population

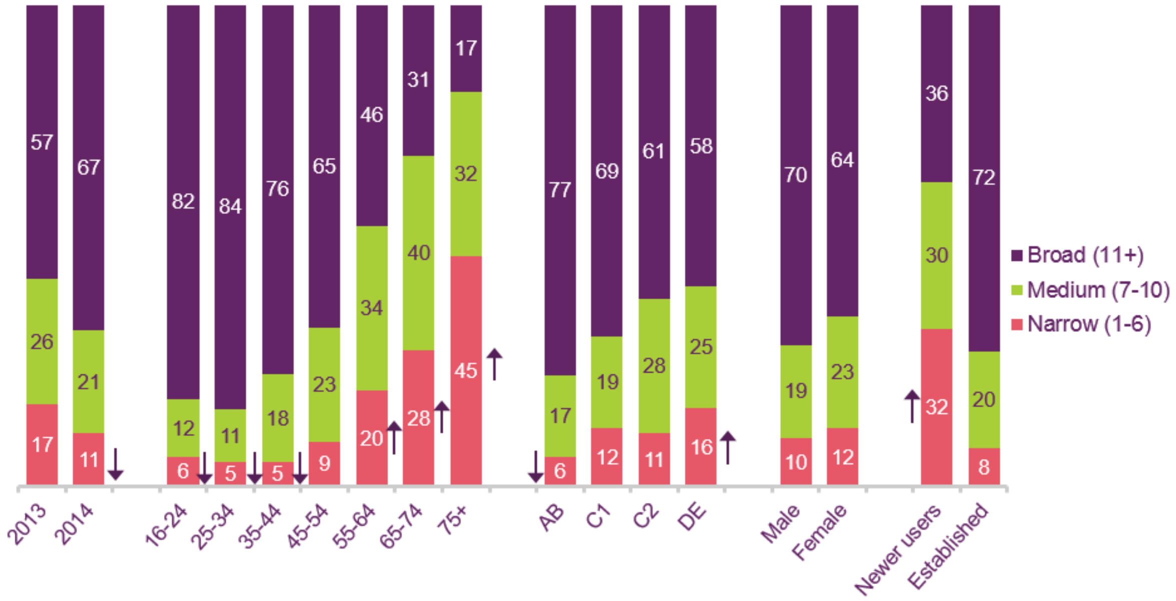
Older adults, DE adults and newer users are more likely to be Narrow users

Figure 173 compares the incidences of Narrow, Medium and Broad users between 2013 and 2014, and across the different demographic groups (including newer and more established users).

Narrow users account for around one tenth (11%) of all internet users, a decrease since 2013[60] (17%), Medium users account for a fifth (21%) of internet users, which has also decreased (26%). As a result Broad users have increased since 2013 (57%) and now account for two thirds (67%) of all internet users.

Those aged 55 and over are more likely than all internet users to be Narrow users (20% for 55-64s and 28% for 65-74s and 45% for 75+), as DEs (16%), and newer users (32%).

Figure 173: Breadth of use of the internet, by demographic group and recency of use



IN15/16 – Could you please tell me from this list the types of things you currently do online, and how often you do each?
Base: All adults aged 16+ who go online at home or elsewhere (1609 in 2014, varies by demographic)
Arrows show (for Narrow users) significant differences (95% level) for age / socio-economic group compared to all internet users, males compared to females, and newer users (less than 5 years) compared to more established users (more than 5 years)

[60] While comparisons are made to 2013 these are indicative only as prior to 2014 there were 18 types of use that were used to segment internet users into Narrow users (1-6 types) , Medium users (7-10 types) and Broad users (11-18 types). The activity 'Online gambling' was removed from the 2014 study. It is also worth noting that the individual online activities that make up each type of use have changed over time; however, the types of use have maintained as much consistency as possible over time.

Demographic profile of narrow users versus medium and broad users

Narrow internet users are more likely to be aged 55+ and DEs

Figure 174 compares the age, socio-economic group and gender profile of narrow, medium and broad internet users.

Compared to all internet users, narrow users are more likely to be aged 55+ and in DE socio-economic group. While not shown in Figure 174, the demographic profile of narrow users is unchanged since 2013.

Figure 174: Demographic profile of narrow vs. medium and broad users

Demographic	All internet users	Narrow users	Medium users	Broad users
Base	1609	226	380	988
Aged 16-24	15%	8%	9%	19%
Aged 25-34	20%	10%	11%	26%
Aged 35-44	22%	10%	19%	25%
Aged 45-54	17%	14%	18%	16%
Aged 55-64	13%	24%	22%	9%
Aged 65-74	9%	22%	16%	4%
Aged 75+	3%	12%	5%	1%
AB	28%	15%	22%	32%
C1	31%	33%	27%	32%
C2	18%	18%	23%	16%
DE	24%	34%	28%	20%
Male	48%	45%	43%	50%
Female	52%	55%	57%	50%

Internet use

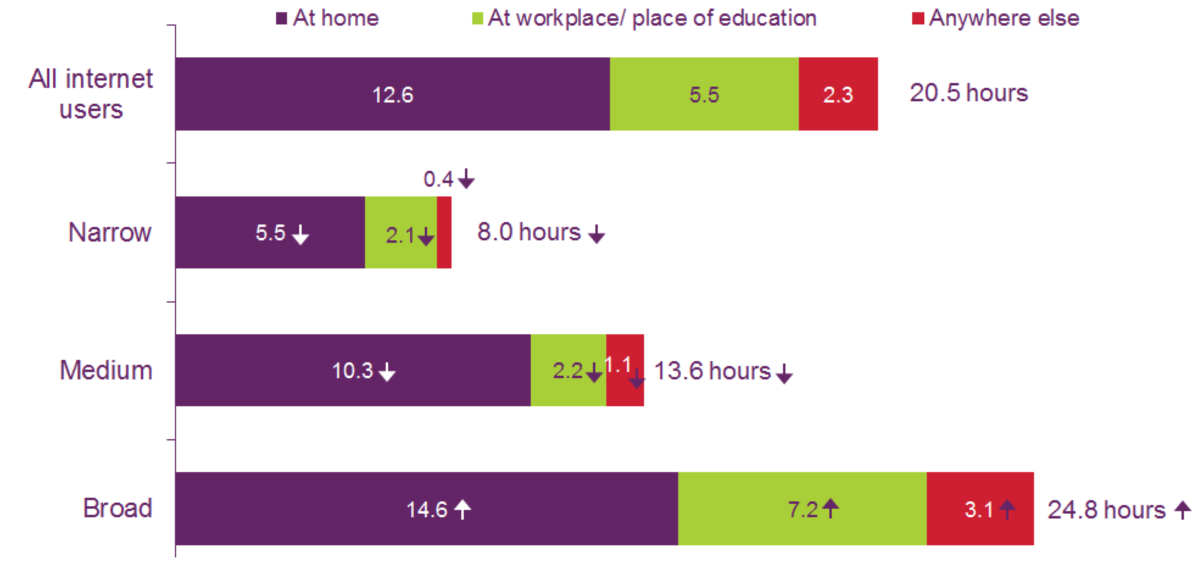
Narrow users have a lower overall volume of use and are more likely to use the internet only at home, or only outside the home

Both narrow and medium users of the internet have a lower estimated weekly volume of use compared to internet users as a whole (8.0 hours for narrow and 13.6 hours for medium vs. 20.5 hours for all internet users). Narrow users have a lower volume of use at home (5.5 vs. 12.6 hours), in the workplace/ place of education (2.1 vs. 5.5 hours) and anywhere else (0.4 vs. 2.3 hours).

More than twice as many narrow users use the internet only at home and nowhere else, compared to all internet users (45% vs. 20%). More than four in ten (44%) narrow users use the internet both at home and elsewhere, whereas this applies to the majority of all internet users (78%). While one in ten (11%) narrow users use the internet only outside the home, this is higher than the incidence among all users (2%).

Regarding the devices used to go online at home or elsewhere, narrow users (50%) are much more likely than all internet users (20%) to access via a desktop computer, laptop or netbook rather than an alternative device such as a mobile phone, games player, e-book reader, smart TV, tablet computer or wearable technology.

Figure 175: Volume of internet use per week: narrow, medium and broad users

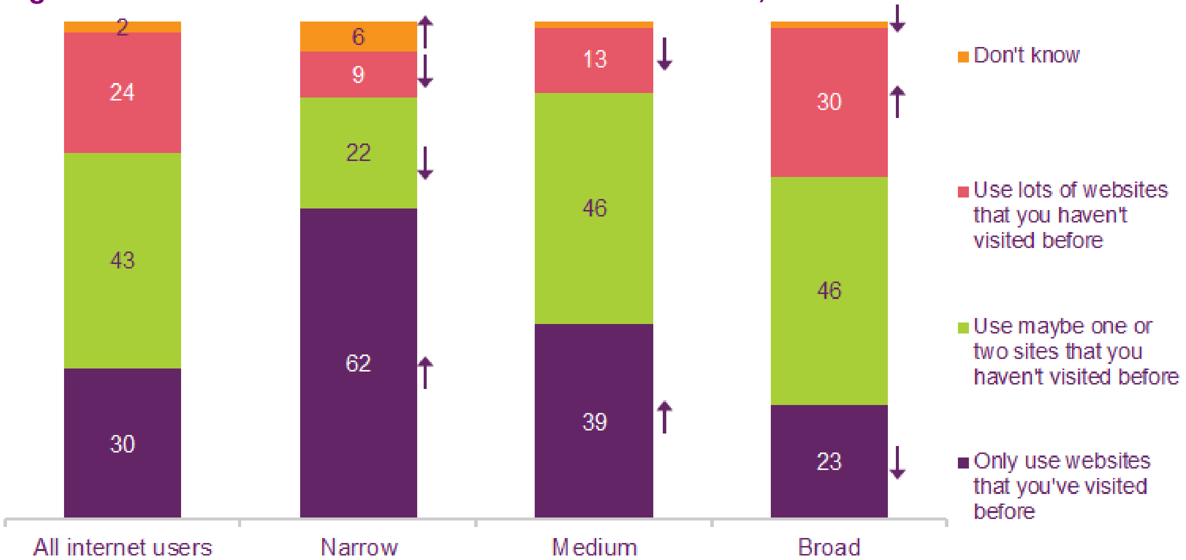


IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
Base: All adults aged 16+ who go online at home or elsewhere (1609 aged 16+), narrow (226), medium (380) and broad users (988).

Narrow users are more likely to use only those sites they've visited before

Compared to all internet users (30%), narrow users (62%) are more likely to say that (in most weeks when they use the internet) they only use websites they have visited before, and less likely to say they use lots of websites they haven't visited before (9% vs. 24%) or maybe one or two websites they haven't visited before (22% vs. 43%).

Figure 176: Use of websites not visited before: narrow, medium and broad users



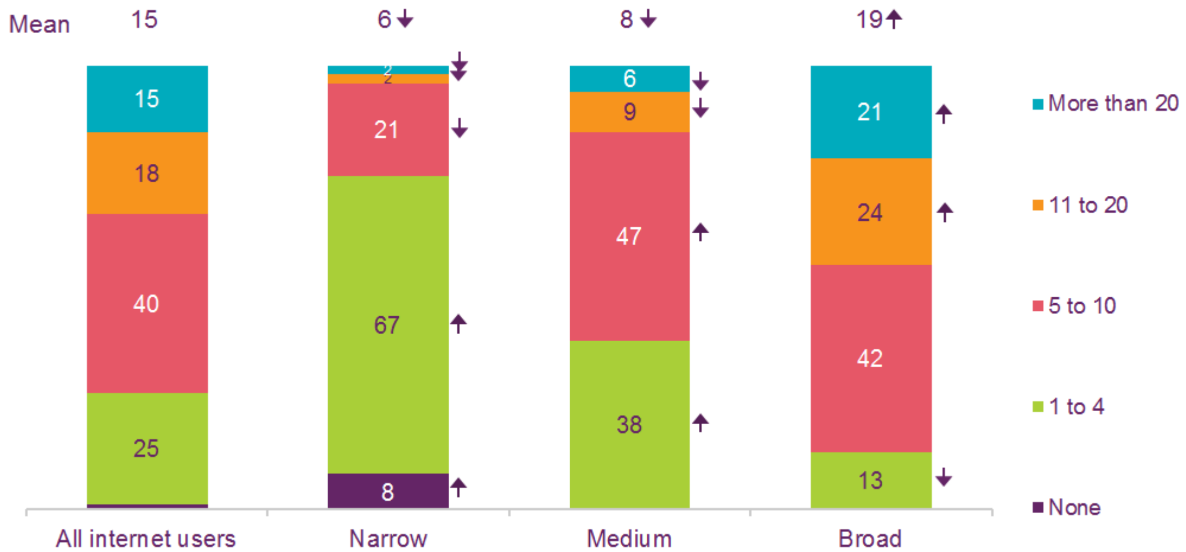
IN14 – In most weeks when go online, would you say that you…
Base: All adults aged 16+ who go online at home or elsewhere (1609 aged 16+), narrow (226), medium (380) and broad users (988).

Narrow users estimate that they visit fewer websites in a typical week

In a typical week, narrow internet users estimate that they visit six different websites, compared with the 15 different websites that all internet users estimate that they visit.[61]

Three quarters of (75%) narrow users say they visit fewer than five websites in a typical week compared to a quarter of all internet users (26%). Just 2% of narrow users say they visit more than twenty different websites, which is much lower than for all internet users (15%).

Figure 177: Estimated number of different websites per week: narrow, medium and broad users



IN19 - Thinking now about all the different websites that you visit in a typical week for whatever purpose, whether that's at work, at home or elsewhere? How many different websites would you say you visit in a typical week?
Base: All adults aged 16+ who go online at home or elsewhere (1609 aged 16+), narrow (226), medium (380) and broad users (988).

<u>Confidence as an internet user</u>

Narrow internet users are less confident users

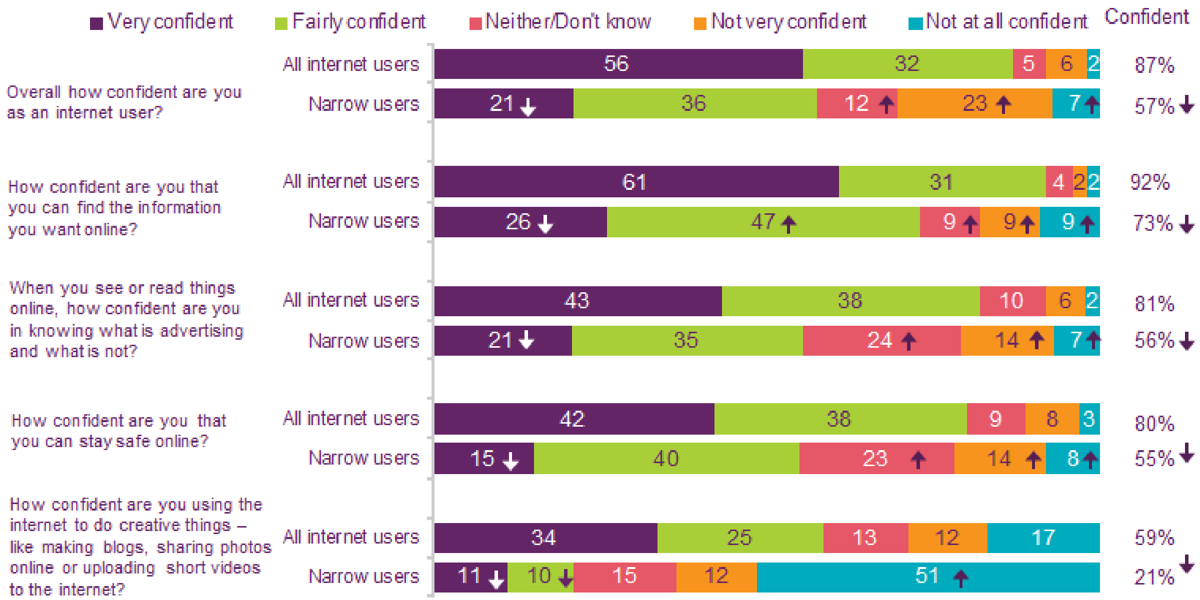
Figure 178 shows responses given by narrow users and by all internet users regarding different types of online confidence. For each aspect, Narrow users are less likely to describe themselves as 'very confident' and more likely to describe themselves as not confident (either not very or not at all confident).

A quarter (26%) of narrow users rate themselves as 'very confident' in finding the information that they want online (compared to 61% for all internet users), with one in five (21%) 'very confident' that they can distinguish between what is online advertising and what is not (43% for all). One in seven narrow users are 'very confident' they can stay safe online (15% vs. 42%), while one in ten are 'very confident' in using the internet to do creative things (11% vs. 34%).

[61] Because these estimates are self-reported it is likely that a degree of under- and over-reporting will be present, and the estimates shown should be taken as indicative only.

Just 21% of narrow users describe themselves as ‘very confident’ overall as an internet user, compared to over half (56%) of all users.

Figure 178: Confidence as an internet user: narrow vs. all internet users



IN13A-E – 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: All adults aged 16+ who go online at home or elsewhere (1609 aged 16+), narrow users (226).
Significance testing shows any difference between narrow users and all adults

Understanding search engine results

Narrow users are less likely to use search engines, and are less likely to ‘understand’ how search engines operate

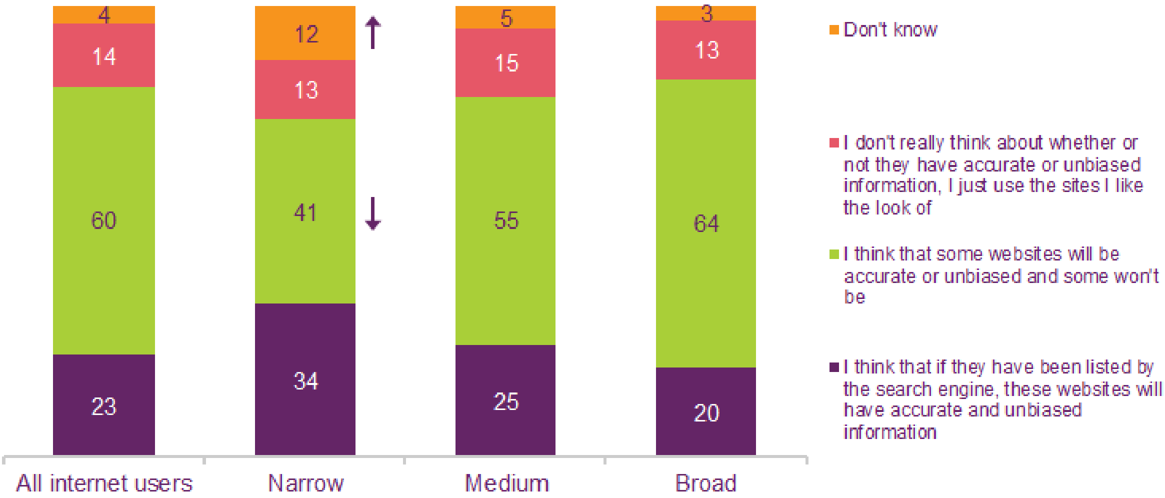
While eight in ten (81%) narrow users ever use search engines, this is lower than the figure for all internet users (95%).

Those who ever use search engines were asked to say which of the following statements was closest to their own opinion:

- “I think that if they have been listed by the search engine, these websites will have accurate and unbiased information.”
- “‘I think that some of the websites will be accurate or unbiased and some won’t be.”
- “I don’t really think about whether or not they have accurate or unbiased information, I just use the sites I like the look of.”

As shown in Figure 179, narrow users are less likely than all internet users to say that some websites will be accurate or unbiased and some won’t be (41% vs. 60%). Instead, narrow users are more likely to say that, if listed by the search engine, then the results will have accurate and unbiased information (34% vs. 23%) or are uncertain (12% vs. 4%).

Figure 179: Opinions on search engine accuracy: narrow, medium and broad users



IN45 – When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages?
Base: All adults aged 16+ who go online at home or elsewhere (1609 aged 16+), narrow (226), medium (380) and broad users (988).

Security concerns about providing personal information

Narrow users are much more likely to say they would never share personal information online

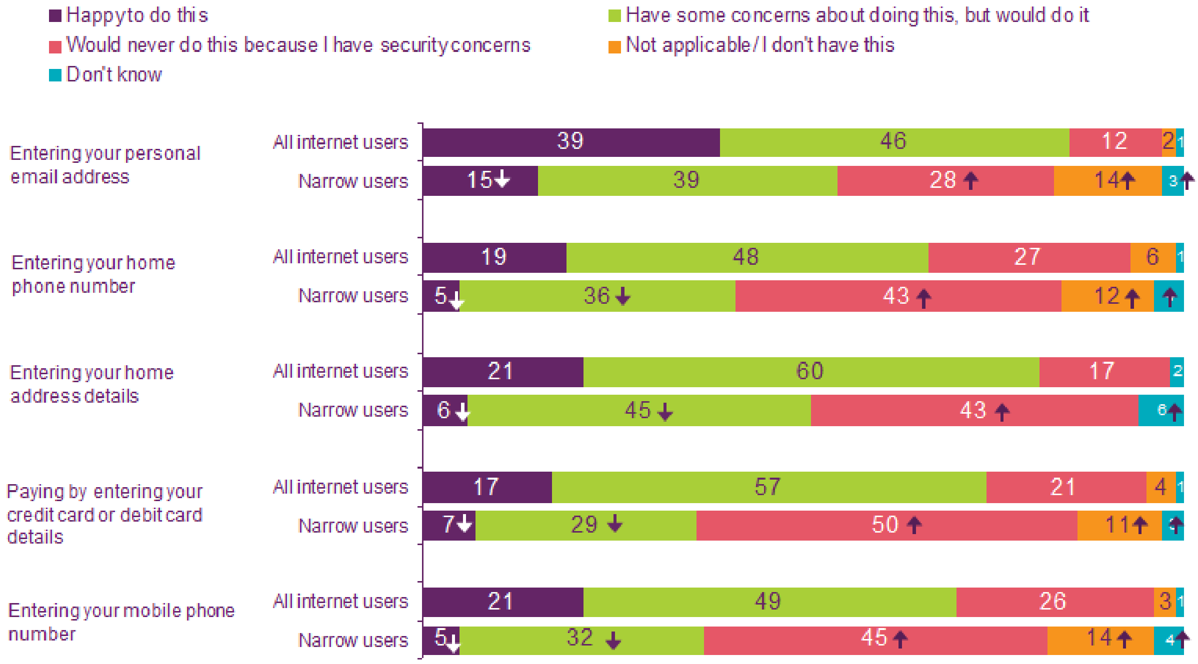
Figure 180 compares the responses of narrow users and all internet users, in terms of the extent to which they would have any security concerns about providing five types of personal information online, perhaps when making an online payment or registering online.

In each case, narrow users are more likely than all internet users to say they would never provide that information online because of security concerns, and are less likely to say they would be happy to provide this information.

Half of narrow internet users say they would not provide their credit or debit card details (50%) while three in ten narrow users say they would never provide details of their personal email address (28%).

Narrow users are much less likely to say they use the internet for transactions at least weekly (15% vs. 54%). This difference in experience of transacting online could account for some of the differences shown in Figure 180. Narrow users may be more likely to say they would not enter this information online because they lack experience with transacting online, or they may be less likely to transact online because they have these concerns.

Figure 180: Personal details prepared to enter online: narrow, medium and broad users



IN38A-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.
Base: Adults aged 16+ who go online at home or elsewhere (1609), narrow users (226).

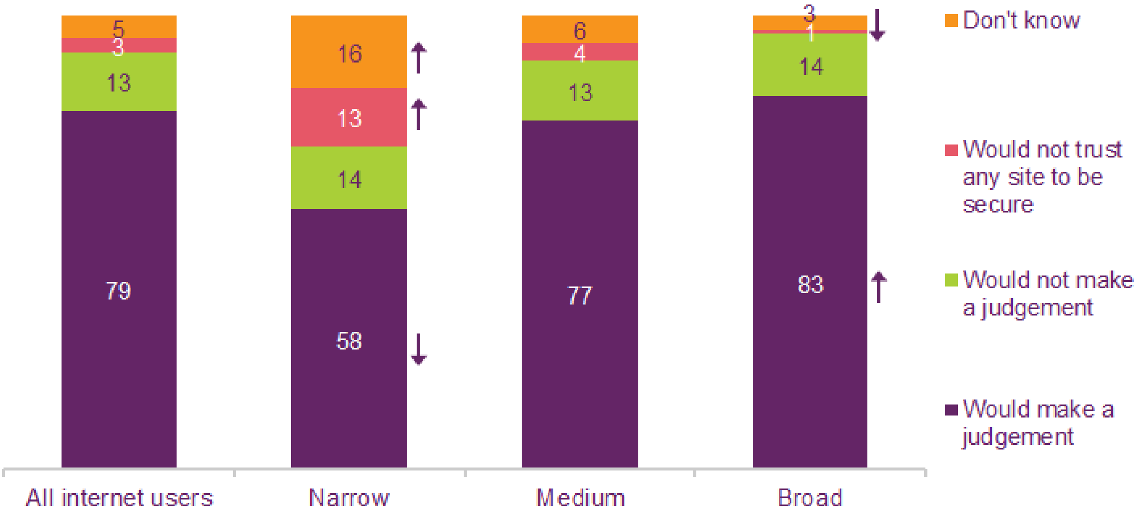
Judgements made about websites

Narrow users are less likely to say they would make a 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.

Four in five internet users (79%) say they would make a judgement about a website before entering any personal details, but this is less likely among narrow users (58%). Narrow users are as likely as all users to say they would not make a judgement (14% vs. 13%), but are more likely to say they would not trust any site to be secure (13% vs. 3%). Narrow users are also more likely to be unsure as to which option applies to their making a judgement before entering personal details online (16% vs. 5%); perhaps because they have had less experience of doing this.

Figure 181: Judgements made before entering personal details: narrow, medium and broad users



IN39 – Could you tell me whether you would make a judgement about a website before entering these types of details? (Your home address or phone number, your credit or debit card details and so on) How would you judge whether a website is secure to enter these type of details?
Base: All adults aged 16+ who go online at home or elsewhere (1609 aged 16+), narrow (226), medium (380) and broad users (988).

Online security measures and safety features

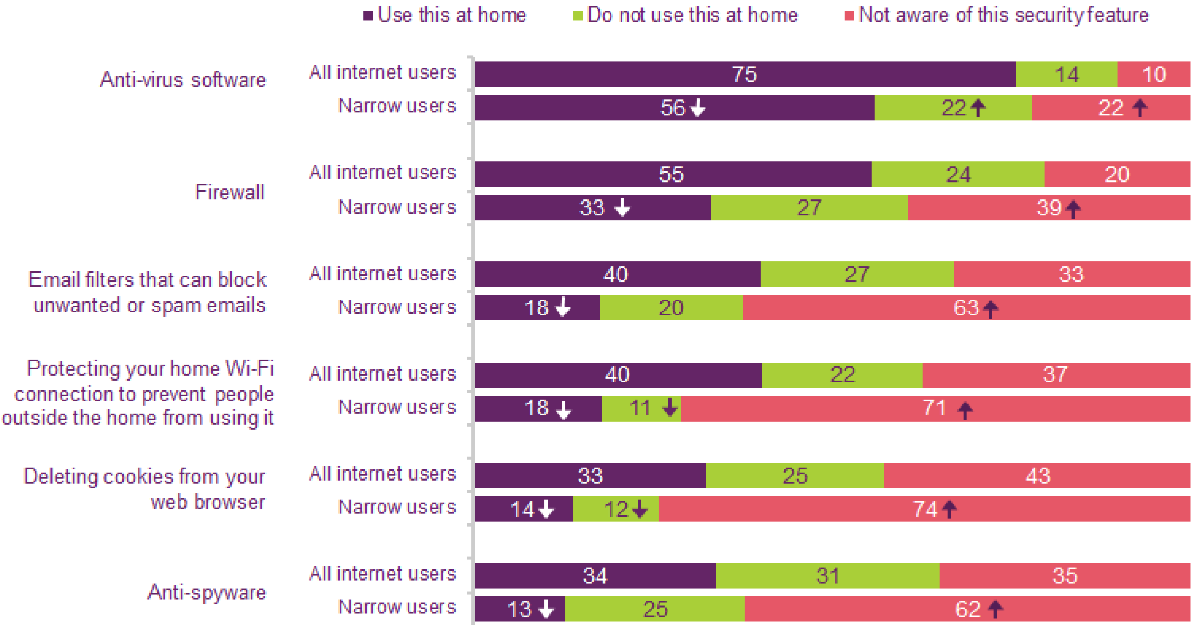
Narrow users are less likely to know about, or use, security measures and safety features

Awareness and use of each of the six security measures and safety features that we asked about is lower for narrow users than for all internet users.

A majority of internet users are aware of all six features, while a majority of narrow internet users are only aware of two features: anti-virus software (78%) and firewalls (61%). A similar proportion of narrow users, around four in ten, are aware of anti-spyware (38%) and email filters that can block unwanted or spam emails (37%), with 29% aware of protecting a home Wi-Fi connection and 26% aware of deleting cookies from a web browser.

More than half (56%) of narrow users say they use anti-virus software with a third (33%) of narrow users saying they use firewalls. The other four features are used by around one in five (20%) or fewer narrow users.

Figure 182: Security measures/ safety features installed on devices: narrow, medium and broad users



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 any of the devices you use to go online at home? (prompted responses, multi-coded)
Base: Adults aged 16+ who go online at home (1573 aged 16+), narrow users (207). Significance testing shows any difference between narrow users and all internet users.

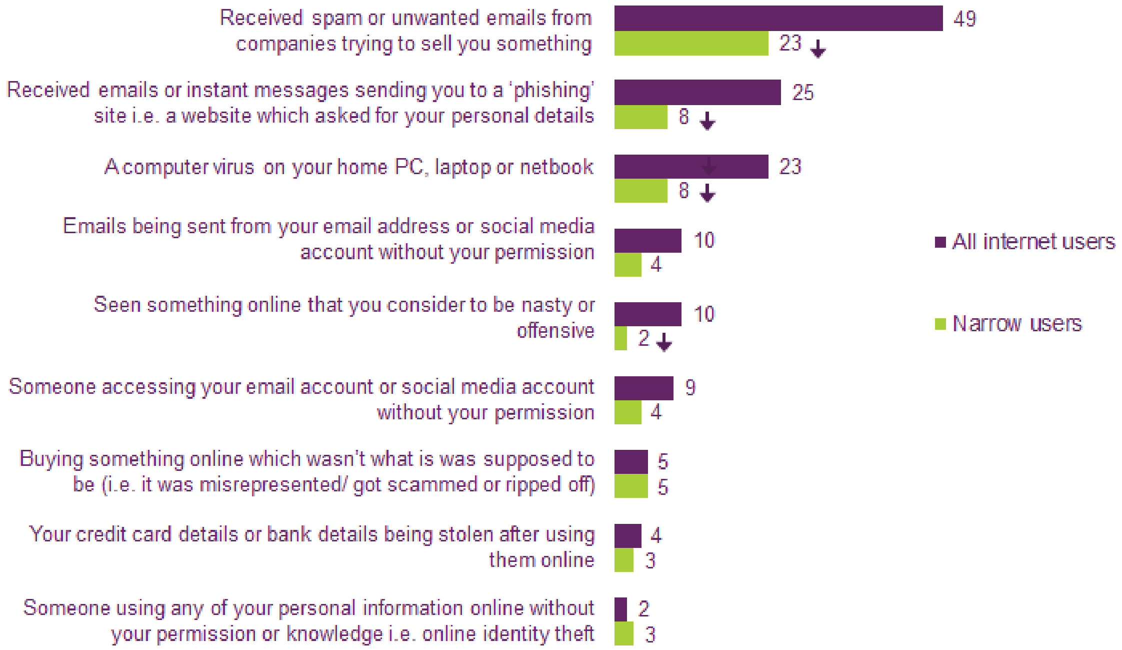
Experience of negative online events in the past 12 months

Narrow users are less likely to have experienced most of the negative events in the past 12 months

Respondents were prompted with a list of nine possible negative online events. Narrow users are less likely than all internet users to say they have experience of six of these events in the past 12 months. For example, they are much less likely to cite spam or unwanted emails (23% vs. 49%), emails or instant messages sending them to a 'phishing' site (8% vs. 25%), and a computer virus (8% vs. 23%).

None of the events we asked about are more likely to have been experienced by narrow users.

Figure 183: Experience of any negative types of online activity: narrow vs. all internet users



IN9 – Which, if any, of the following have you personally experienced in the last 12 months?
Base: All adults aged 16+ who go online at home or elsewhere (1609 aged 16+), narrow users (226).
Significance testing shows any difference between narrow users and all adults

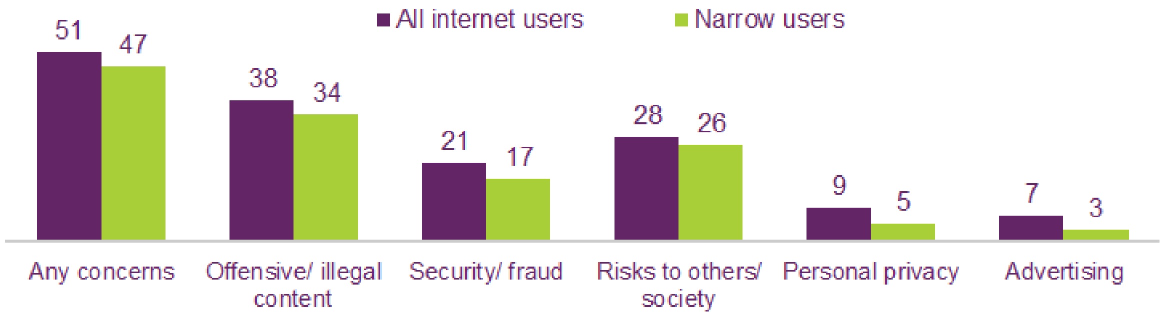
Concerns about the internet

Narrow users are as likely as all internet users to have concerns about what is on the internet

As shown in Figure 184, narrow users (47%) are as likely as all internet users (51%) to have concerns about what is on the internet.

There are no differences between narrow users and all internet users in terms of the specific type of concerns about what is online. One in three narrow users (34% vs. 38% for all) have concerns that relate to offensive/ illegal content, with one in four concerned about risks to others or to society (26% vs. 28%), and one in six about security/ fraud (17% vs. 21%).

Figure 184: Concerns about the internet: narrow users



IN34 – Can you tell me if you have any concerns about what is on the internet? Base: All adults aged 16+ who go online at home or elsewhere (1609 aged 16+), narrow users (226). Significance testing shows any difference between narrow users and all adults

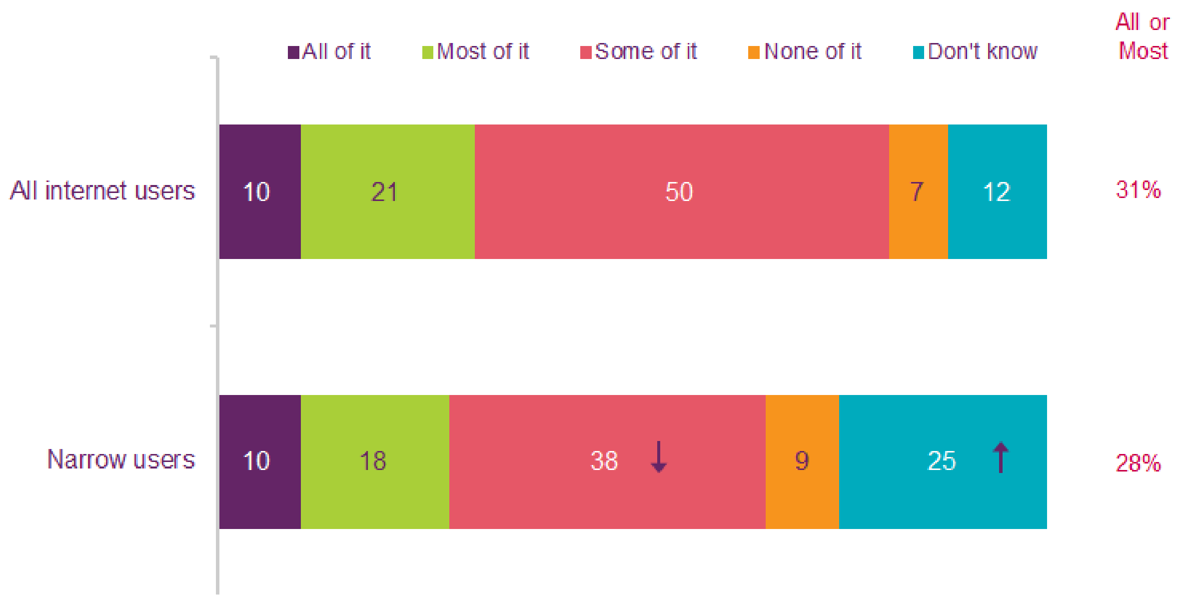
Online regulation

Narrow users more likely to say they are unsure as to how much of what can be seen and read online is regulated

Figure 185 shows that narrow users are more likely than all internet users (25% vs. 12%) to be unsure about how much of what can be seen or read online is regulated.

While half (50%) of internet users give the correct response that some of what can be seen or read online is regulated, this is less likely among narrow internet users (38%). Narrow users are, however, no more likely to believe that all or most online content is regulated (28% vs. 31% for all).

Figure 185: Opinion on how much of what can be seen or read online is regulated: narrow users



IN36. far as you know, how much of what can be seen or read online is regulated? By regulation we mean rules and guidelines that must be followed when putting things online
Base: All adults aged 16+ who go online at home or elsewhere (1609 aged 16+), narrow users (226).

7.5 Non-users of the internet

This section looks at the incidence of non-use of the internet i.e. those who do not use the internet at home or anywhere else on any type of internet-enabled device[62]. It makes comparisons between the demographic profiles of internet users and non-users in 2014.

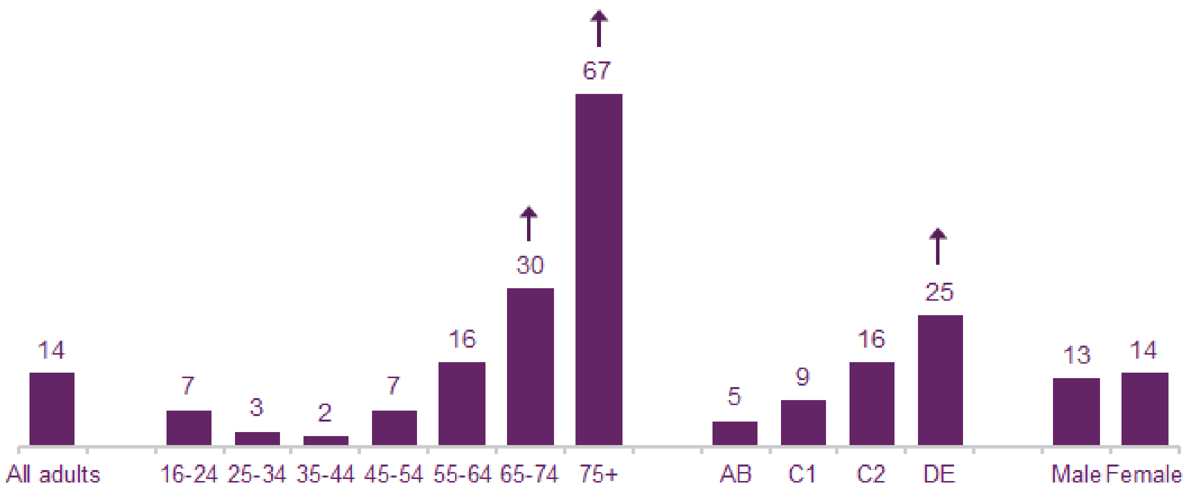
Incidence of non-users within the adult population

Two in three aged 75+ are non-users of the internet

Figure 186 shows that 14% of adults in the UK are non-users of the internet with this being more likely for those aged 65-74 (30%) and 75+ (67%) as well as among DEs (25%).

While not shown in the chart there has been no change in this incidence of non-users among all adults since 2013 (17% in 2013 vs. 14% in 2014).

Figure 186: Incidence of non-use of the internet, by demographic group



Derived from several questions - IN1/ IN2/ IN3 / IN4 (See questionnaire)
Base: All adults aged 16+ (1890 in 2014, 254 aged 16-24, 288 aged 25-34, 327 aged 35-44, 284 aged 45-54, 276 aged 55-64, 221 aged 65-74, 240 aged 75+, 430 AB, 551 C1, 376 C2, 533 DE, 927 male, 963 female).
Arrows show significantly higher groups for (95% level) for age and socio-economic group compared to all adults

Demographic profile of non-users versus internet users

More than half of non-users are aged 65 and DE

Figure 187 compares the age, socio-economic group and gender profile of internet users and non-users (across any device, in any location).

The key differences in profile are that non-users are more likely than users to be aged 65 and over. Three in five (61%) non-users are in this age bracket, compared to 12% for internet users, and 17% of the population as a whole. Half (50%) of non-users are also in the DE socio-economic group (vs. 24% of users).

[62] This definition of non-users therefore encompasses those adults that say they do not use any of the following devices to go online at home or anywhere else: desktop computer, laptop, netbook, smartphone, tablet computer, games console, games player, portable media player, smart TV, e-book reader or through wearable technology.

Figure 187: Demographic profile of all UK adults, users and non-users of the internet

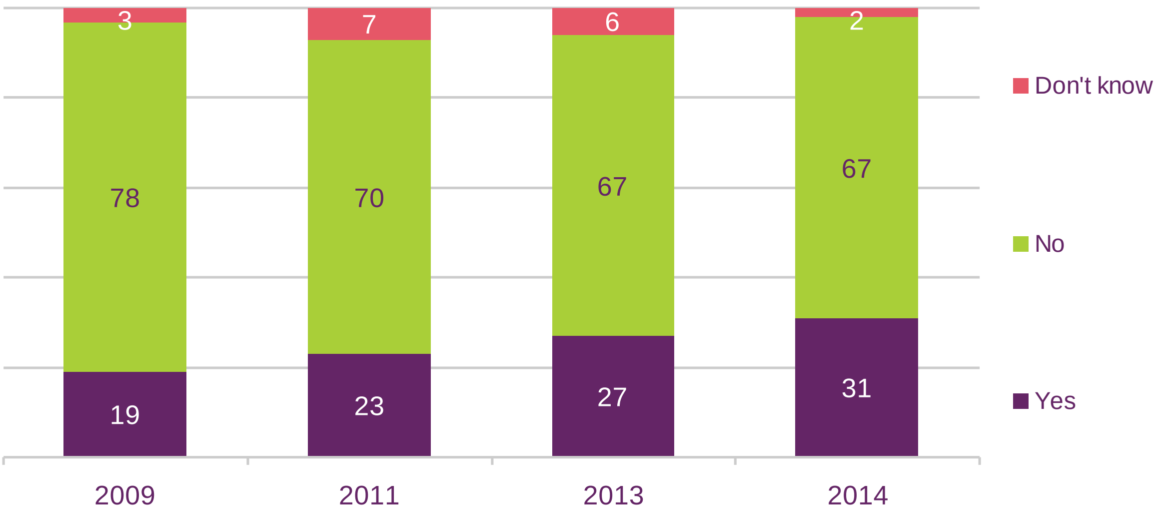
Demographic	All UK adults	Internet users	Non-users of the internet
Base	1890	1609	281
Aged 16-24	14%	15%	8%
Aged 25-34	18%	20%	4%
Aged 35-44	20%	22%	3%
Aged 45-54	14%	17%	8%
Aged 55-64	16%	13%	16%
Aged 65-74	10%	9%	23%
Aged 75+	7%	3%	38%
AB	25%	28%	10%
C1	29%	32%	20%
C2	18%	17%	21%
DE	27%	24%	50%
Male	48%	48%	47%
Female	52%	52%	53%

Proxy use of the internet by non-users

Three in ten non-users have asked someone else to use the internet on their behalf

We asked non-users of the internet whether they had asked someone else to send an email, get information from the internet or make a purchase from the internet on their behalf in the past year. Three in ten (31%) non-users have made a proxy use of the internet in this way, as was the case in 2013 (27%). There are no differences in making a proxy use of the internet in this way by age (when comparing those aged 16-64 to those aged 65+[63]) or by gender

Figure 188: Proxy use of the internet in the past year among non-users: 2009-14



IN10 – In the past year, have you asked someone else to send an email for you, get information from the internet for you, or make a purchase from the internet on your behalf? Base: All adults aged 16+ who do not go online at home or anywhere else (310 in 2009, 454 in 2011, 370 in 2013, 281 in 2014) Significance testing shows any change between 2013 and 2014

[63] The low base size of non-users prevents any further analysis by demographic sub group

Intentions for going online

One in ten non-users say they will start to use the internet in the next 12 months

In 2014, non-users of the internet were asked whether they thought, in the next year or so they would start to go online on a regular basis. Figure 189 shows that one in ten non-users (10%) say they will start to go online in the next year. Around three in four non-users (77%) say this will not change and the remaining one in eight non users (13%) are unsure.

Among non-users aged under 65, one in seven (14%) say they will start to go online in the next year or so, with close to one in four unsure (23%).

Non users aged 65 and over are more likely to say they will not start to go online in the next year or so, compared to those aged under 65 (87% vs. 63%).

Figure 189: Whether will become an internet user in the next year, by age and gender

IN11 –You said that you don't go online at the moment either at home or elsewhere using any type of device. Can you tell me if you think this will change in the next year or so? In other words that you will use the internet on a regular basis.
Base: All adults aged 16+ who do not go online at home or anywhere else (281 in 2014, 100 aged 16-64, 181 aged 65+, 136 male, 145 female)

Perceived advantages of being online

One in three non-users recognise the advantages to being online – rising to half of those non- users aged under 65

Non-users of the internet were prompted with seven possible benefits of being online and were asked to say which, if any, of them they thought would be the main advantages to them personally of being online, and also to nominate any other advantages. The results are shown in Figure 190.

Half of all non-users (52%) do not feel that there are any advantages to being online, with one in three (34%) stating at least one advantage and the remaining one in seven (14%) unsure. The most popular advantage to being online from the prompted list among non-users is finding information quickly (22%). Around one in ten non-users (11%) named being able to stay in touch with people through making free phone/ video calls and sharing photos as an advantage, with a similar proportion (9%) stating that getting the best deals and saving money would be an advantage to being online. All other potential benefits were only considered an advantage to being online by around one in twenty non-users or fewer.

Non-internet users aged 65 and over (58%) are more likely to say there are no advantages in being online compared to those aged under 65 (40%). Non-users aged under 65 are more likely than those aged 65 and over to consider the following as advantages to being online:

- Finding information quickly (33% vs. 14%)
- To stay in touch with people through free phone/ video calls or sharing photos (21% vs. 5%),
- Finding out or applying for social services or completing government processes (9% vs. 1%)
- Finding a job or course (6% vs. 0%).

Figure 190: Perceived advantages of being online among non-users

IN12 Which, if any, of the following do you think would be the main advantages to you of being online? Can you think of any other advantages for you personally in being online?
Base: Adult internet users aged 16+ who do not go online at home or elsewhere (281)