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Children and Parents: Media Use and Attitudes Report

RESEARCH REPORT:

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About this document

This report examines children's media literacy. It provides detailed evidence on media use, attitudes and understanding among children and young people aged 5-15, as well as detailed information about the media access and use of young children aged 3-4.

The report also includes findings relating to parents' views about their children's media use, and the ways that parents seek – or decide not – to monitor or limit use of different types of media.

The report is a reference for industry, stakeholders and consumers. It also provides context to the work Ofcom undertakes in furthering the interests of consumers and citizens in the markets we regulate.

The Communications Act 2003 placed a responsibility on Ofcom to promote, and to carry out research in, media literacy. This report on children and parents contributes to Ofcom's fulfilment of this duty.

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1. Executive summary

Media literacy is the ability to use, understand and create media and communications in a variety of contexts. Our 2017 Children's and Parents' Media Use and Attitudes report is part of Ofcom's media literacy research programme. It provides detailed evidence on media use, attitudes and understanding among children and young people aged 5-15, as well as in-depth information about media access and use among children aged 3-4. It also includes data on parents' views about their children's media use, and the ways that parents seek – or not – to monitor or limit such use.

In 2017, the report includes findings from an additional online study was conducted with 500 children aged 12-15, which explored children's awareness, use and perceptions of content providers, and their interest in and ability to make critical judgements about news.

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

1. Analysis of children's television viewing habits sourced from BARB, the UK's television measurement panel, 2011-2016.
2. ComScore data on the frequency with which the most popular web entities among internet users were visited by children aged 6-14 in May 2017.

Published alongside this report is the Children's Media Lives 2017 qualitative research report.

This executive summary draws together findings from all these sources to provide an overarching narrative on children's media experience in 2017.

Media lives by age: a snapshot

3-4s

1% have their own smartphone, **21%** have their own tablet.

96% watch TV on a TV set, for around **15h a week**

41% watch TV on other devices, mostly on a tablet

40% play games, for nearly **6h a week**.

53% go online, for nearly **8h a week**.

71% of these mostly use a tablet to go online.

48% use YouTube, of which 52% of these say cartoons are their favourite thing to watch, 15% say unboxing videos.

0% have a social media profile.

5-7s

5% have their own smartphone, **35%** have their own tablet.

95% watch TV on a TV set, for around **13½h a week**

49% watch TV on other devices, mostly on a tablet

66% play games, for nearly **7½h a week**.

79% go online, for around **9h a week**.

63% of these mostly use a tablet to go online.

71% use YouTube, of which 30% say cartoons are their favourite thing to watch, 18% say funny videos or pranks.

3% have a social media profile.

The **TV set** is the device they say they would miss the most.

8-11s

39% have their own smartphone, **52%** have their own tablet.

95% watch TV on a TV set, for nearly **14h a week**.

55% watch TV on other devices, mostly on a tablet

81% play games, for around **10h a week**.

94% go online, for nearly **13½h a week**.

46% of these mostly use a tablet to go online, **22%** a mobile.

81% use YouTube, of which 23% say funny videos or pranks are their favourite thing to watch, 18% say music videos.

23% have a social media profile.

The **TV set** or **tablet** are the devices they would miss the most.

12-15s

83% have their own smartphone, **55%** have their own tablet.

91% watch TV on a TV set, for nearly **14½h a week.**

68% watch TV on other devices, mostly a tablet or mobile.

77% play games, for around **12h a week**.

99% go online, for nearly **21h a week**.

49% of these mostly use a tablet to go online, **26%** mostly use a mobile.

90% use YouTube, of which 26% say music videos are their favourite thing to watch, 23% say funny videos or pranks.

74% have a social media profile.

Their **mobile phone** is the device they would miss the most.

Overview of key themes

Traditional TV and YouTube both play important roles in a changing viewing landscape, but some children feel that there is not enough content that reflects their lives

Live viewing on the TV set remains an important part of children's lives. The TV set is still used by more children than any other device for watching content, and most of this viewing is made up of live TV, with early evening family entertainment from the BBC and ITV dominating the top ten most-watched programmes among 4-15s. For younger children, TV on the TV set makes up the largest proportion of their media time, and although there has been a decline over the last decade in the number of hours children spend watching, 2017 has seen an increase in the number of hours parents of younger children say their child spends watching TV on the TV set.

For older children the picture is more mixed. The 12-15s who watch TV on a TV set spend nearly 14 and a half hours a week viewing, similar to younger children. However, this is part of their larger overall media consumption, and they spend more hours online and using their mobiles in a typical week than watching on a TV set. This age group are also most likely not to watch on a TV set at all: around one in ten 12-15s say that they don't watch any television on a TV set, higher than last year, while the number who say this is the device they mostly use to watch TV has decreased since last year to around six in ten.

This change in the habits of older children is part of wider changes in the media landscape. For example, more 3-11s are online than in 2016, with much of this growth coming from increased use of tablets. Unsurprisingly, tablets and other portable, connected devices are also playing an important role in TV viewing, with increases in the numbers of children who ever watch TV on a device other than a TV set, and nearly a quarter of 12-15s mostly watching on either a tablet or a mobile phone.

The other important factor in the changing content consumption landscape is YouTube. Double digit increases this year mean that half of 3-4s and more than eight in ten 5-15s now use YouTube. It is the most recognized content brand among 12-15s, and the one they are most likely to think includes their age group in its target audience, saying either that it is aimed specifically at their age group or at everyone. It is the one they would turn to first for all types of content they say is important to them, and the one they say they would miss the most if it was taken away. More 8-11s and 12-15s also say they prefer watching content on YouTube than TV programmes on the TV set. Some of what children are watching on YouTube includes whole programmes, but there is huge variety, and younger children are most likely to be using it to watch cartoons, mini-movies or songs, while older children are most likely to watch music videos and funny or prank videos.

Despite the wide range of available content and services, however, around a third of 8-11s say that there are not enough programmes that show children that look like them, and four in ten 12-15s say there are not enough programmes that show children living in the same part of the country as them.

TV is an important source of news for children, and is seen as more likely than social media to report the news truthfully

Around half of 12-15s say they are interested in the news, increasing to almost all 12-15s after prompting with a list of different types of news, including music, celebrities, sports and serious things going on in the UK and the world. TV is the most popular source of news among 12-15s, followed by social media and friends and family, and those who watch news on TV are more likely to say it is reported truthfully than those who get their news from social media.

News consumed online or via social media can be challenging to interpret, with nearly half of 12-15s who use social media for news agreeing that it is difficult to tell whether a news story is true, and two in five saying they have seen something online or on social media that they thought was fake news. However, most of those who use social media for news have strategies for checking whether a story is true, with the most popular approach checking to see if a story appears elsewhere, followed by looking at the comments to see what people had said about the story. The news brand was also important, with around a quarter looking to see whether the source of the story was trustworthy or whether they had heard of the organisation behind the story.

Children are adopting newer social media sites and services, but these can bring social pressure and parents are not always aware of the minimum age requirements

Almost a quarter of 8-11s and three-quarters of 12-15s have a social media profile. Although this is unchanged since 2016, the sites children use are changing. Fewer are using Facebook, and if they do, they are less likely to say it is their main profile. Snapchat has increased in popularity; the number saying it is their main profile has doubled since 2016. This is borne out in the qualitative research – Snapchat (and in particular Snapstreaks, where children send each other messages every day over consecutive days) is hugely popular across the sample. Other innovations are also catching on; one in ten 12-15s have 'gone live' by sharing a video using live streaming services such as Facebook Live, Snapchat's Live Stories or Instagram Live, while a third have not shared content themselves but have watched live streams.

However, social media can be difficult for children and parents to manage. One in eight 12-15s who say they use social media say there is pressure to look popular all the time, and parents aren't always aware of the minimum age requirements for social media sites. Close to two in five parents of 5-15s (38%) whose child has a profile on Facebook or Facebook Messenger are aware that 13 is the minimum age requirement for setting up a profile, with awareness lower among parents whose child has a profile on Instagram (21%), Snapchat (15%) or WhatsApp (7%).

Newer forms of online advertising can be hard for children to identify

The online world also brings other challenges, including a more complex advertising environment. While the majority of 12-15s are aware of personalised online advertising, and that vloggers may be paid to endorse products or brands, the qualitative research shows that they are not always able to identify this in practice, especially on social media when it looks similar to the other content they see. Similarly, while around half of 12-15s who use search engines understand that Google gets its revenue from companies paying to advertise on the site, less than half correctly identify sponsored links on Google as advertising, despite these being distinguished by a box with the word 'ad' in it, and around a quarter of 8-11s and 12-15s believe that Google provides some kind of authenticating role, in that if a website is listed by the search engine then it can be trusted.

Some children report negative experiences online, although many are taking action in response

Almost all 8-11s and 12-15s who go online say they have been told how to use the internet safely. Nevertheless, going online can expose children to unwanted experiences: 17% of 8-11s and 29% of 12-15s who go online say they have ever seen something online that they have found worrying or nasty; 45% of 12-15s who go online say they have seen hateful content online in the last year[1], an increase since 2016; one in ten 12-15s have seen something online or on their phone of a sexual nature that made them feel uncomfortable; and 12% of 12-15s say they have been bullied on social media, equal to the number who say they have been bullied face to face.

Many children who have these types of experiences take action in response. Most 8-11s and 12-15s who go online say they would tell someone if they saw something worrying or nasty, with this most likely to be a family member. Around three-quarters of 12-15s are aware of online reporting functions, and one in eight who go online had used it to report something they had seen that was worrying or nasty. For hateful content, where the comments are less likely to be directed at the recipient personally, the most common response is to ignore it, followed by reporting it or commenting on it to say it was wrong. We also saw in the qualitative research that some children were prepared to use social media or other online forums to challenge comments that they thought were hurtful or hateful, and that many of the children saw social media as a powerful tool for spreading positive messages.

More parents than in 2016 are concerned about their children's media use, and more are taking action to protect their children online

Levels of concern among parents have increased; more parents than in 2016 are saying they are concerned about their child's media use across TV, online, mobile phones and gaming. Nevertheless, most parents continue to say that their child has a good balance between screen time and doing other things.

Perhaps prompted by these concerns, most parents have measures in place to manage their children's media use. They use a combination of approaches to mediate their child's access to and use of online content and services, including regularly talking to their children about staying safe online, using technical tools, supervising their child, and using rules. Sixteen per cent of parents of 3-4s who go online and 40% of parents of 5-15s use all four types of approach, and nearly all parents use at least one. The number of parents of 5-15s using network-level filters, which filter content on

[1] Children aged 12-15 were asked 'In the past year, have you seen anything hateful on the internet that has been directed at a particular group of people, based on, for instance, their gender, religion, disability, sexuality or gender identity? Examples of these sorts of things might be nasty or hateful comments or images that have been posted on social media, comments in response to an article that you read online, or videos posted on sites like YouTube.'

all devices connected to the home broadband network, has increased since 2016; these are now used by around four in ten parents who have broadband and whose child goes online.

2. Summary of key findings

Internet access and portable devices

More younger children are going online than in 2016…

More 3-4, 5-7s and 8-11s are online than in 2016, with increases of more than ten percentage points for the youngest two age groups. As a consequence, half (53%) of 3-4s are now online, as are 79% of 5-7s and 94% of 8-11s. Ninety-nine per cent of 12-15s are also online, unchanged since last year.

… with much of the growth coming from increased use of tablets

Children aged 3-4 and 5-15 are more likely than in 2016 to have their own tablet, and those aged 3-11 are also more likely than in 2016 to use their tablets to go online. This has driven the increase in internet use, and tablets continue to be the devices most likely to be used by this age group to go online.

TV and content consumption

The TV set remains the most widely-used device for watching TV content

More than nine in ten children in all age groups ever watch TV on a TV set, and the TV set is also the device children are most likely to 'mostly' use to watch content. However, there are differences by age: while 88% of 3-4s mostly watch TV on a TV set, this decreases with age to 62% of 12-15s, and 12-15s are less likely than in 2016 to say they 'ever' or 'mostly' watch on a TV set.

Younger children spend the largest proportion of their media time watching the TV set, while older children spend more of their time online and on their mobile phone

Watching TV on the TV set makes up the largest proportion of 3-4s' and 5-7s' media time (around 15 hours and 13 and a half hours respectively), followed by going online and playing games. Children aged 8-11 spend comparable amounts of time watching TV on a TV set and using the internet (around 13 and a half hours), with fewer hours spent gaming or using a mobile phone. Those 12-15s who watch TV on a TV set spend more time doing this than either 5-7s or 8-11s: nearly 14 and a half hours. However, this is part of higher overall media consumption, and they spend the highest proportion of their time online (nearly 21 hours) followed by using a mobile phone (around 18 hours).

The amount of time younger children spend watching TV on the TV set has increased since 2016

The amount of time parents estimate their child spends watching TV on the TV set has increased by nearly an hour a week for 3-4s and just over an hour for 5-7s. It is unchanged for older children. This year's increase among younger children is in contrast to a longer-term decline in the time children spend watching the TV set. BARB data for 2016, which echoes Ofcom survey findings from 2016, shows that 4-15s watched an average of just under 12 hours of broadcast television per week in 2016, down by more than an hour per week since 2015 and by over five hours since 2011. However, in 2016 some of this was offset by an increase of 35 minutes in time-shifted and unmatched viewing (including viewing of video-on-demand services like Netflix, apps on smart TVs, DVDs and gaming).

Most of children's viewing on the TV set is to live broadcast programmes

Despite the increase in time-shifted viewing, BARB data show that most of 4-15s' viewing on the TV set is to programmes at the time of broadcast (83%). Early evening family favourites on BBC and ITV are particularly popular, with *Britain's Got Talent, Strictly Come Dancing* and *Bake Off* among the top ten most-watched programmes for 4-15s.

More children than in 2016 are watching TV programmes on devices other than a TV set

The number of children who watch content on other devices, while lower than those who watch on a TV set, has increased since 2016 for most age groups. The increase among younger children is attributable to their being more likely to watch on a tablet, while the increase among 12-15s is attributable to their being more likely to watch on a mobile phone, desktop or laptop, or on a games console. Nearly a quarter of 12-15s (23%) now mostly watch TV content on either a tablet or a mobile phone.

The qualitative research suggests that viewing on other devices is often to content that children think parents won't be interested in, or may not approve of

Children in the qualitative research were watching content on portable devices that they thought family members were less likely to be interested in, and in some cases, less likely to approve of. For some of the children this was part of a deliberate strategy to carve out space away from the oversight of parents. For others, it was a way to pass the time when alone during the day.

There have been big increases in the numbers of younger children watching YouTube

Use of YouTube has increased by 11 percentage points since 2016, to 48% for 3-4s, by 17 percentage points to 71% for 5-7s and by eight percentage points to 81% for 8-11s. Ninety per cent of 12-15s use YouTube, unchanged since last year. Half of YouTube users aged 3-4 and a quarter aged 5-7 only use the YouTube Kids app rather than the main YouTube website or app.

Younger children are most likely to use YouTube to watch cartoons, animations, mini-movies or songs, while older children are most likely to watch music videos and funny or prank videos

Children aged 3-4 and 5-7 are most likely to watch cartoons, animations, mini-movies or songs on YouTube, while 8-11 and 12-15s are most likely to watch music videos and funny videos/ jokes/ pranks/ challenges. Thirteen per cent of 3-4s watch whole programmes on YouTube, increasing with age to 27% of 12-15s.

YouTube is the most recognised content brand among 12-15s, followed by ITV and Netflix

YouTube is the most recognised content provider among 12-15s, with 94% saying they had heard of it, followed by ITV (89%), Netflix (87%) and BBC One/BBC Two (82%). YouTube was also the content brand 12-15s were most likely to say they ever watched (85%), and the only one that a majority of 12-15s said they 'often' used to watch content (67%). After YouTube, 12-15s are most likely to say they ever watch ITV (65%) and BBC One/Two (57%), but less than half say they 'often' watch either of these. Netflix (38%) is the next most likely to be watched 'often', after YouTube. Other Ofcom research[2] has found that BBC iPlayer and ITV Hub are also important content sources, with 54% saying they ever watch TV programmes or films on iPlayer and 32% on ITV Hub. BARB data suggest that children may be underestimating their viewing of some channels, perhaps because they are more familiar with programme than channel brands. For instance, according to BARB, 70% of 10-15s in TV households watched at least 15 consecutive minutes of BBC One in an average month in 2016. The figure for ITV1 was more in line with children's own perceptions, at 60%.

YouTube is the content brand 12-15s are most likely to think includes them in its target audience

None of the content brands asked about are seen by a majority of 12-15s as aimed at 'people my age'. YouTube, Netflix, Amazon Prime and ITV are most likely to be seen as aimed at 'everyone'. Nine in ten (88%) 12-15s who are aware of YouTube think it is aimed either at people 'my age' or at 'everyone', with between half and three-quarters saying this for Netflix, Amazon Prime, ITV and BBC One/BBC Two. CITV, CBBC, Sky Kids, Disney Channel and Nickelodeon are mostly seen by 12-15s as aimed at 'people younger than me'.

12-15s are most likely to say YouTube is the content brand they would miss the most

YouTube is the content brand 12-15s say they would miss the most if it was taken away, cited by 48%, followed by 19% saying Netflix. Both 8-11s and 12-15s are also more likely to say they prefer watching YouTube to TV programmes on a TV set (40% vs. 18% for 8-11s, 46% vs. 15% for 12-15s).

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[2] Research reported in the 2017 Communications Market Review.

Content that makes them laugh is most important to 12-15s when deciding what to watch

Children aged 12-15 were asked what was important to them when choosing what to watch. More than seven in ten choose content that makes them laugh, followed by content that relaxes them or that gives them something to talk about with their friends. Almost half choose content that helps them learn about or find out about new things, and four in ten choose content that makes them think.

Children would turn to YouTube first for all types of content that are important to them

YouTube is the provider that 12-15s who go online are most likely to turn to first for content that is important to them. Netflix is the second most popular provider among 12-15s for content that helps them relax or take time out; that gives them something to talk about with friends; that makes them laugh; or that inspires them to try something new or different. BBC One/BBC Two is the second most popular provider for content that makes them think; that gives them something to talk about with their family; or that helps them to learn about or find out about new things.

The majority of 8-15s say there are enough programmes that reflect them and their lives

A majority of 8-11s and 12-15s say there are enough programmes for children their age (76% and 65%) and that show children doing the sorts of things they/ their friends do (63% and 54%). About half say there are enough programmes that show children who look like them, and nearly half say that there are enough programmes that show children who live in the same part of the country as them. Twelve to 15s in the online survey were also asked about the importance of this content. Around half say it is important to them that the content they watch includes people their age (53%) or doing the same sort of things that they/ their friends do (49%), and around a fifth say that it includes people living in the same part of the country as them (23%) or people who look like them (22%).

But some think there is not enough of this kind of content

However, a sizeable minority of 8-15s say that there are not enough programmes across each of these areas. Children aged 8-11 are most likely to say this about programmes that show children who look like them (35%) and 12-15s are most likely to say this about programmes that show children who live in the same part of the country as them (41%).

Two-thirds of 12-15s say they have a good balance between screen time and doing other things, and a majority of parents agree.

However, managing screen time gets more difficult as children get older: 12% of parents of 3-4s agree that they 'find it hard to control their child's screen time', increasing to 41% of parents of 12-15s.

News

Half of 12-15s say they are interested in the news, increasing to nearly all 12-15s when prompted with a broad range of news categories

Half of 12-15s say they are interested in 'reading, watching, listening to or following news', with nearly one in ten very interested. Interest in news rises to almost all (96%) 12-15s once they are asked to choose from a list of 11 types of news, including music, celebrities, sports and serious things going on in the UK. Music news was the most popular type of news, followed by celebrity news. Thirty-seven per cent said they were interested in news about serious things going on in the UK, and 28% that they were interested in news about serious things going on in other countries.

The TV is the most popular sources of news among 12-15s, followed by social media, and friends or family. Nearly one in five say they read paper copies of newspapers for news.

12-15s are more likely to think news on the TV is reported truthfully than they are to say this about news on social media

Around half of 12-15s say that news on TV, the radio and from friends and family is *mostly* reported truthfully, with around a third saying it is *sometimes* reported truthfully. For news from social media this trend is reversed; around six in ten say news from this source is *sometimes* reported truthfully, and three in ten say it is *mostly* reported truthfully. Twelve per cent say news on the TV is always reported truthfully, compared to 2% who say this about social media.

Nearly half who use social media for news think it is difficult to tell whether a story is true

Nine in ten 12-15s who use social media as a news source say they ever think about whether a story on social media is true; nearly four in ten say they always or often do this. But although nearly half say it is difficult to tell whether a news story on social media is true, most have strategies for checking whether a story is true. The most popular approach is checking to see if a story appears elsewhere, cited by almost half who make checks, followed by looking at the comments to see what people have said about the story. The news brand is also important; about a quarter of those who make checks look to see whether the source of the story is trustworthy, or whether they have heard of the organisation behind the story.

Two in five 12-15s have seen fake news online or on social media

Nearly three-quarters of 12-15s who go online say they are aware of the concept of fake news and two in five say they have ever seen something online or on social media that they thought was a fake news story.

Social media

12-15s are more likely than in 2016 to say their main social media profile is on Snapchat

A quarter of 8-11s and three-quarters of 12-15s have a profile on a social media or messaging site or app. No 3-4s, and 3% of 5-7s, have a profile. Twelve-15s with a profile are less likely than last year to say that Facebook is their main social media profile year (40% vs. 52%) while the proportion who say Snapchat is their main profile has doubled to 32%.

In the qualitative research Snapchat was the most widely-used social media platform among the children, unlike last year, when WhatsApp and Facebook Messenger were the most popular. 'Snapstreaks', when two people on Snapchat send an image to each other every day over consecutive days, is particularly popular, and many of the children were maintaining streaks even with children they were not friends with.

One in ten 12-15s who go online have 'gone live'

Three-quarters of 12-15s who go online have heard of live streaming services (such as Facebook Live, YouTube Live and Instagram Live). One in ten have shared videos using a live streaming service and a third have not shared content but have watched live streams.

One in eight 12-15s with a social media profile say there is pressure to look popular all of the time

Over one in ten 12-15s with a social media profile (13%) agree that getting likes or followers is more important to them than keeping their posts, comments or photos private. The same proportion feel there is pressure to look popular on social media 'all the time'.

Parents are more likely to be aware of the minimum age for Facebook than for Instagram, Snapchat or WhatsApp

Close to two in five parents of 5-15s (38%) whose child has a profile on Facebook or Facebook Messenger are aware that 13 is the minimum age requirement. Awareness of the minimum age is lower among parents whose child uses Instagram (21%), Snapchat (15%) or WhatsApp (7%).

Understanding advertising

8-11s and 12-15s are more likely to say TV adverts mostly tell the truth about what they are selling than they are to say this about online adverts

Children aged 8-15 who say they see adverts online or on TV are most likely to say that each type of advertising 'sometimes' tells the truth about what it is selling. Fewer say these adverts 'mostly' tell the truth about what they are selling, but those who see TV adverts are more likely to say this than those who see online adverts.

Around six in ten 12-15s are aware of personalised adverting and vlogger endorsements

Around six in ten 12-15s who go online are aware of personalised advertising, in that they are aware that other people might see adverts online that are different to those they see, unchanged since 2016. A similar number are aware that vloggers may be being paid to endorse a product they say favourable things about, also similar to last year. However, the qualitative research suggests that children can find it difficult to identify these adverts in practice, especially on social media where they may look similar to other kinds of content.

More 12-15s know how Google and YouTube are funded than how the BBC is funded

Children aged 12-15 who use each service were asked how Google, YouTube and the BBC were funded. Around half give the correct response that companies pay to advertise on Google or on YouTube. When asked about the BBC, a quarter of 12-15s give the correct response, that funding is from everyone who uses the BBC, while the same proportion say it is from companies that advertise with the BBC, and a fifth that it is from the Government or council.

But only a minority of 8-11s and 12-15s can identify advertising on Google

Despite their being distinguished by a box with the word 'Ad' in it, only a minority of 8-11s (28%) and 12-15s (43%) who use search engines can correctly identify sponsored links on Google as advertising, consistent with the findings from 2016. A smaller proportion of 8-15s understand that this is the only reason the results are displayed (22% for 8-11s and 32% for 12-15s).

A quarter of 8-15s believe that if a website is listed by a search engine it can be trusted

A majority of 8-11s (52%) and 12-15s (62%) who use search engine websites are aware that some of the results returned by search engines can be trusted and some can't. However, a quarter of users aged 8-11 and 12-15 believe that if a website is listed by a search engine it can be trusted.

Risky behaviour/negative experiences

Almost all 8-15s who use the internet have been given advice about how to stay safe online

Nearly all internet users aged 8-15 recall being told about how to use the internet safely, with this advice most likely to have come from a parent or teacher. A majority also know how to take technical measures to keep themselves safe: almost seven in ten 12-15s who go online[3] say they

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[3] Most questions asked of children about their risky or negative experiences are based on those children who opted to answer these questions. In order to help ensure truthful responses to these potentially sensitive questions, the children were asked to complete these questions independently, but were also given the option of not completing these questions if they did not feel comfortable doing so. Overall, 87% of 8-11s and 91% of 12-15s opted to complete the section.

know how to block messages on social media from someone they don't want to hear from, and around half have done this; almost half say they know how to change the settings so fewer people can view their social media profile, with a third having done this.

Most 8-15s say they would tell someone if they saw something worrying or nasty online

Seventeen per cent of 8-11s and 29% of 12-15s who go online say they have ever seen something online that they found worrying or nasty. Nearly all 8-11s (95%) and nine in ten 12-15s (90%) say they would tell someone if they saw this kind of content, with this most likely to be a family member. This is unchanged since last year for 8-11s but is less likely for 12-15s (90% vs. 94%).

One in eight 12-15s who have seen something worrying or nasty online have reported it

Three-quarters of 12-15s who go online are aware of online reporting functions and 12% of those who have seen something they considered worrying or nasty have reported it. This chimes with the qualitative research, which found that most of the children were aware of report functions and how to access them, but were more likely to ignore an incident, or to challenge it directly online.

The proportion of 12-15s who say they have seen hateful content online has increased since 2016

More than two in five 12-15s who go online (45%) say that in the past 12 months they have seen 'something hateful on the internet directed at a particular group of people, based on, for instance, their gender, religion, disability, sexuality or gender identity?', an increase since 2016. Over a third of 12-15s who saw this kind of content took some action in response; the most common response was to report it to the website, followed by commenting on it to say they thought it was wrong. Three in five said they ignored it. Over seven in ten 12-15s agree that there should be rules about what can be said online so that people can't say hurtful things about others.

One in ten 12-15s say they have seen something of a sexual nature online or on their mobile phone that made them feel uncomfortable

A quarter of 12-15s say they have ever been contacted online by someone they don't know, and one in ten say they have ever seen something of a sexual nature that made them feel uncomfortable, either online or on their mobile phone.

A small proportion of 8-11s and 12-15s say they have been bullied, either online or face to face

A fifth of 12-15s say they have ever been bullied; this is equally likely to have been face to face or on social media (both 12%), followed by bullying via messaging apps or text (5%). A smaller proportion of 8-11s (12%) say they have been bullied, with this more likely to have been face to face than on social media.

Parental concerns and mediation

Parents are more likely than in 2016 to be worried about the amount of time, and the content, their children are watching on television

Concerns about television content and the time their child spends watching television at home have increased since 2016, with about a fifth of parents of 3-4s and a third of parents of 5-15s saying they have concerns about each of these. There has also been an increase in the proportion of parents who say they are very concerned about what their child has seen on pre-watershed TV, to 6% for 3-4s and 9% for 5-15s, although the majority continue to say they are not concerned.

The majority of parents agree that the benefits of the internet outweigh the risks, although this is lower than in 2016

The majority of parents whose child goes online continue to agree that they trust their child to use the internet safely, and feel they know enough to help their child to manage online risks. They are also more likely to agree than to disagree that the benefits of the internet outweigh the risks, although agreement has decreased since 2016 among parents of both 3-4s and 5-15s.

Parents of 5-15s are more likely than in 2016 to be concerned about online risks

Parents are most likely to say they are concerned about 'companies collecting information about what [their children] are doing online'; with almost half saying they were concerned about this. This is unchanged since last year, but there have been a number of increases in other concerns: parents of 5-15s are more likely to have concerns about cyberbullying; giving out details to inappropriate people; time spent online; seeing content which encourages them to harm themselves; their child damaging their reputation; online content; and the possibility of their child being radicalised online.

Parents are more likely than in 2016 to be concerned about mobile phones and gaming

Two in five parents of 12-15s are concerned about their child being bullied through their phone, or how much time their child spends using their phone, with around three in ten concerned about whom their child is in contact with on their mobile phone. Each of these has increased since 2016. Parents of 8-11s also expressed these concerns, although in lower proportions.

Concerns among parents of 5-15s are also higher than in 2016 for time spent gaming, the pressure to make in-game purchases, gaming content, whom their child is gaming with online, the amount of advertising in games, and the possibility of their child being bullied by other players.

Parental mediation

Most parents use a combination of approach to manage their children's internet use

Parents use a combination of approaches to mediate their child's access to and use of online content and services, including: regularly[4] talking to their children about staying safe online, using technical tools, supervising their child, and using rules. Sixteen per cent of parents of 3-4s who go online and 40% of parents of 5-15s use all four types of approach, and nearly all parents of 3-4s and 5-15s use at least one. Just 1% of parents of 3-4s, and 4% of parents of 5-15s, do not mediate their child's internet use in any of these ways.

Use of network level filters increased again this year

Nearly two in five parents of 3-4s and 5-15s who have home broadband and whose child goes online use home network-level content filters, and this has increased for both groups since 2016, part of a continuing upward trend. Use of parental control software (software set up on a particular device, e.g. Net Nanny, McAfee Family Protection) has also increased among parents of 3-4s and 5-15s, to around three in ten. More than nine in ten parents of 5-15s who use either of these tools consider them useful, and around three-quarters say they block the right amount of content.

One in five parents who use network-level filters think their child would be able to bypass them, although fewer 12-15s say they have done this

One in five of the parents of 5-15s who use network-level filters say they think their child would be able to unset, bypass or over-ride them; more likely than in 2016. This is similar to the number of 12-15s who say they know how to do this, although fewer say they have ever done it (6%).

Parents are more likely than in 2016 to have changed the settings on mobile phones and tablets

One in five parents of 5-15s have changed the settings on a tablet or mobile phone to prevent their child downloading apps or making in-app purchases, both up since 2016.

[4] In this context 'regularly' is defined as at least every few months

3. Introduction

Background

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

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

Ofcom's definition of media literacy is:

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

This report is designed to give an accessible overview of media literacy among children and young people[5] aged 5-15 and their parents/carers[6], as well as an overview of media use by children aged 3-4.

Where possible, within the sample of children aged 5-15 and their parents, demographic analysis is conducted by age (of the child interviewed), by gender and by household socio-economic group. Where differences exist by demography these are commented on in the report.

The key objectives of this research are:

- to provide a rich picture of the different elements of media literacy across the key platforms: the internet, television, games, and mobile phones;
- to identify emerging issues and skills gaps that help to target stakeholders' resources for the promotion of media literacy; and
- to provide data about children's internet habits/opinions and parents' strategies to protect their children online; to inform the work of the UK Council for Child Internet Safety (UKCCIS), which brings together over 180 organisations to help keep children and young people safe online; and other stakeholder organisations such as Get Safe Online.

[5] References to children in this report are used to refer to children and young people.
[6] References to parents in this report are used to refer to parents and carers.

Research methodology and analysis

This report provides an update to the reports on children's media literacy published in 2006, 2008, 2010, 2011, 2012, 2013, 2014, 2015 and 2016[7]. It draws on the following surveys:

Media Literacy Tracker with children and parents:

A quantitative tracking survey conducted in 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016 and 2017[8]. In April/ May/ June 2017, 1,388 in-home interviews with parents and children aged 5-15 were conducted, along with 677 interviews with parents of children aged 3-4. In April/ May/ June 2016, 1,375 in-home interviews with parents and children aged 5-15 were conducted, along with 684 interviews with parents of children aged 3-4. In April/ May/June 2013, 1,689 in-home interviews were conducted with parents and children aged 5-15 as well as 685 interviews with parents of children aged 3-4. In April/ May and September/ October 2010, 2,071 in-home interviews with parents and children aged 5-15 were conducted.

Young People's Media Usage survey:

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

Media Literacy Audit:

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

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

Significance testing at the 95% confidence level was carried out. This means that where findings are commented on in the report, there is only a 5% or less probability that the difference between the samples is by chance[9]. Statistically significant findings are indicated in the figures in the report by arrows.

Where possible, findings are shown for 5-15s as well as for the specific age groups (5-7, 8-11 and 12-15). However, some questions in earlier surveys, and some questions in the current survey, were not asked of all age groups. It is also worth noting that in some instances where there is a change over

[7] www.ofcom.org.uk/research-and-data/media-literacy-research

[8] Findings from the 2009, 2011, 2012, 2014 and 2015 Media Literacy Trackers have been removed from the Figures within this report to reduce data overcrowding.

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

time among all children aged 5-15, this may not be accompanied by a change among 5-7s, 8-11s or 12-15s for that measure, due to smaller base sizes for these sub-groups.

Online research with 12-15s

In 2017, the in-home research was complemented by an online study with 500 children aged 12-15. The purpose of this research was to better understand older children's media use and attitudes in two key areas:

- Their awareness, use and perceptions of content providers that could be used to watch TV programmes, films, videos or clips.
- Their interest in news, the sources used for news updates - with a particular focus on social media - and awareness of and exposure to fake news.

The online interviews were conducted through a research panel between the 1st and 7th June 2017. The initial approach was to the child's parent (the panel member) to gain their permission to interview the child aged 12-15, before gaining permission from the child. Quotas were set by age, gender and nation. The online data were weighted to match the socio-economic group profile for households with an internet user aged 12-15.

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

As detailed above, from 2013 onwards the *Media Literacy Tracker* was also conducted with parents of children aged 3-4, with a total of 677 interviews conducted in-home in April/ May/ June 2017. Findings have been shown for 3-4s wherever possible, with comparisons between 2017, 2016 and 2013 for this age group, and also comparing the findings for children aged 3-4 and the older children interviewed for this survey. Data for children aged 3-4 are not included in the overall analysis for all children aged 5-15, both because the media habits of pre-school children are likely to differ substantially from those of school-age children, and because including them in the larger group would impede our ability to compare results over time.

Changes that were made after 2014

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

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

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

4. Children's media time

This section details the self-reported[10] levels of consumption by the child for each of the following: going online, playing games, watching television on a TV set and using a mobile phone (owned by the child).

Key findings

- The youngest children (aged 3-4 and 5-7) continue to spend the highest proportion of their media time per week watching TV on a TV set, followed by going online and then playing games.
- Children aged 8-11 spend comparable amounts of time watching TV on a TV set and using the internet (around 13 hours 30 minutes), with fewer hours spent gaming or using a mobile phone (10 hours).
- Children aged 12-15 spend the most time per week[11] online (close to 21 hours), followed by using a mobile phone (around 18 hours) and watching TV on a TV set (more than 14 hours). They spend the least time gaming (around 12 hours)[12].
- Compared to 2016[13], the youngest children spend more time watching television on a TV set in a typical week. Estimates for 3-4s have increased by nearly one hour per week (to around 15 hours from around 14 hours) and by more than one hour for 5-7s (to around 13 and a half hours from around 12 and a half hours in 2016).
- Children aged 3-4 spend fewer hours per week playing games (about six hours, down from close to seven hours in 2016).
- Estimates for the time spent going online, playing games and watching TV on a TV set are unchanged since 2016 for children aged 8-11 or 12-15.

Differences by gender

- Boys in each age group from 5 to 15 spend more hours per week playing games, compared to girls.
- Boys aged 8-11 also spend more hours online than girls in a typical week.
- Girls aged 12-15 estimate they spend, on average, 21 and a half hours per week using their mobile phone, which is nearly 50% higher than the estimate given by boys (around 15 hours).

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[10] The estimates for the youngest children (aged 3-4 and 5-7) are taken from the parent, whereas children aged 8-11 and 12-15 provide their own estimates. These estimates are based on children who use each of these media: those who watch TV on a TV set, go online, play games, and those with a mobile phone, as opposed to all children.
[11] The estimates of media use by age group discussed in this section should also be considered in the context of the relative proportions undertaking each activity. For example, while 8-11s spend a similar amount of time in a typical week watching TV on a TV set as they do going online, more 8-11s watch TV on a TV set than go online.
[12] There will be a degree of overlap between these estimates, as discussed later in this section.
[13] It is not possible to comment on the trend for hours spent using a mobile phone, as this question was added to the study in 2017.

Differences by household socio-economic group

- Compared to the average, children aged 5-15 in DE households spend more time watching TV on a TV set and more time online, while those in AB households spend fewer hours online or gaming.

Media consumption

Children aged 3-4 and 5-7 spend more time than in 2016 watching TV on a TV set

We asked parents of younger children (aged 3-4 and 5-7) who undertake each activity, and older children themselves (aged 8-11 and 12-15), to estimate the hours spent at home or elsewhere, using the internet, playing games on games players/ consoles, watching television on a TV set[14] and using their mobile phone[15], both on a typical school day and on a typical weekend day[16]. Parents of children aged 3-4, whose child uses each of these media, were asked about their use on a typical weekday[17] and weekend day.

When making comparisons across media, as is the case here, it is worth bearing in mind that there will be a degree of overlap between these estimates. For example, a proportion of the hours spent using a mobile phone could also be included in the estimate for being online, or playing games, if the child also uses their mobile phone for these purposes. Some of these activities may also be undertaken simultaneously, for instance using a mobile phone while also watching TV on a TV set.

It is also worth bearing in mind that these figures rely on parents' and children's ability to recall their own behaviour, and as these estimates are self-reported it is likely that there will be a degree of under- and over-reporting. Given the difficulties inherent in this, these figures work best as an indication of the relative balance of these different activities in children's lives, and how this balance has changed over time.

Figure 1 shows that overall, children aged 5-15 spend more time online (15 hours 18 minutes) or using their mobile phone (15 hours 6 minutes) than they do watching television on a TV set (14 hours) or playing games (10 hours 12 minutes).

In 2017, as in previous years, there are differences by age: children aged 3-4 and 5-7 spend more time watching television on a television set than they spend online or playing games. Children aged 8-11 spend comparable amounts of time watching television and using the internet, with fewer

[14] Since 2015, unlike in previous years, parents and children have been asked to focus on time spent watching TV on a TV set, as opposed to across any type of device used to watch television content, so it is only possible to compare data between 2016 and 2017

[15] This particular measure was included in the survey for the first time in 2017. Before this, the measures for mobile phone related to the volumes of calls made and messages sent. As this question is based on children with their own mobile phone the base is too low to report on for the youngest groups (aged 3-4 and 5-7).

[16] Estimates of hours shown are not based on all children, but on all children who go online/ play games/ watch TV on a TV set/ have a mobile phone and who use these either at home or elsewhere.

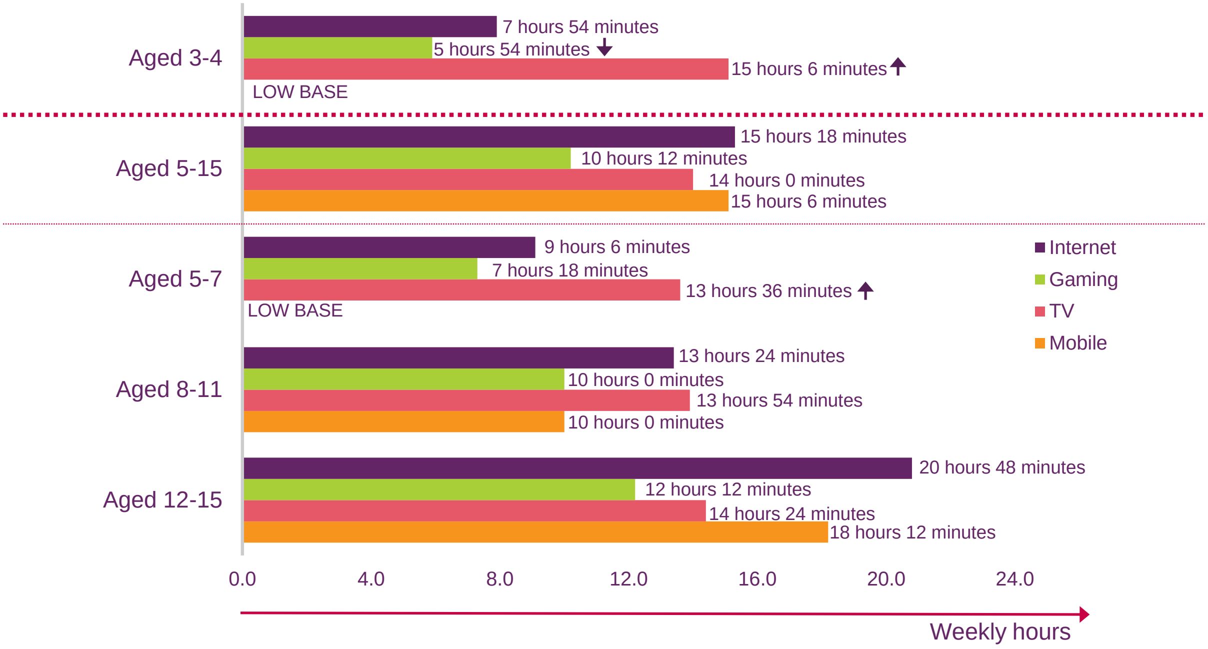
[17] As their child aged 3-4 may not yet be attending school, which in turn will affect their 'availability' to consume media.

hours spent gaming or using a mobile phone. Children aged 12-15 spend the most time online, followed by using a mobile phone and watching TV on a TV set, and spend the least time gaming.

At an overall level, across children aged 5-15 there has been no change in estimated hours consuming media since 2016. Children aged 3-4 or 5-7 are, however, more likely to spend more hours per week watching television on a TV set. Those aged 3-4 spend less time per week playing games[18].

Later in this report (Section 13), when addressing parental concerns, we look specifically at the extent to which parents say they are concerned about the amount of time their child spends consuming media, as well as the extent to which they are concerned about their child's screen time.

Figure 1: Estimated weekly hours of media consumption at home or elsewhere, among users, by age: 2017



QP8A-B/ QP25A-B/ QP57A-B/QP66A-B How many hours would you say he/ she spends [USING MEDIUM] on a typical school day/ on a weekend day?

Responses are taken from the child aged 8-11 or 12-15 rather than the parent.

Base: Parents of children aged 3-7 and children aged 8-15 who use each medium (VARIABLE BASE) - Significance testing shows any change between 2016 and 2017

[18] Although this decrease between 2016 and 2017 follows a corresponding increase between 2015 and 2016, as discussed at Figure 4.

On average, children spend 30 to 60 minutes more using media on a weekend day than on a school day

As mentioned above, the overall estimates for weekly media consumption are derived from individual estimates for school days and weekend days. These individual estimates by school day and weekend day are shown in Figure 2.

Parents of children aged 3-4 give a higher estimate of time spent per weekday/ school day for watching television on a TV set than parents of 5-7s (2 hours vs. 1 hour 42 minutes), but they give similar estimates for watching television on a weekend day.

In contrast, parents of 5-7s give a higher estimate than parents of 3-4s of time spent per weekend day for going online (1 hour 48 minutes vs. 1 hour 24 minutes) and for playing games (1 hour 36 minutes vs. 1 hour 6 minutes), but they give similar estimates for going online or playing games on a weekday/ school day.

Among 5-7s, 8-11s and 12-15s weekend-day estimates for hours spent watching television, going online and gaming are higher than for school days, as are 8-11s' and 12-15s' estimates for the amount of time spent using their mobile phone.

Broadly speaking, 3-4s spend about half an hour or less using each type of medium on a weekend day than on a weekday. Children aged 5-7 spend around 45 minutes more using each type of media on a weekend day, while 8-11s and 12-15s spend about 45 to an hour more on each type of media on a weekend day.

Figure 2: Estimated hours of media consumption at home or elsewhere among users, per week day and weekend day, by age: 2017

	Hours spent going online per day	Hours spent playing games per day	Hours spent watching TV on a television set per day	Hours spent using their mobile phone per day
Aged 3-4				
School day**	1 hour 0 minutes	0 hours 48 minutes	2 hours 0 minutes	LOW BASE
Weekend day	1 hour 24 minutes	1 hour 6 minutes	2 hours 36 minutes	LOW BASE
Aged 5-15				
School day	1 hour 54 minutes	1 hour 12 minutes	1 hour 42 minutes	1 hour 54 minutes
Weekend day	2 hours 54 minutes	2 hours 6 minutes	2 hours 42 minutes	2 hours 42 minutes
Aged 5-7				
School day	1 hour 6 minutes	0 hours 48 minutes	1 hour 42 minutes	LOW BASE
Weekend day	1 hour 48 minutes	1 hour 36 minutes	2 hours 36 minutes	LOW BASE
Aged 8-11				
School day	1 hour 36 minutes	1 hour 12 minutes	1 hour 42 minutes	1 hour 12 minutes
Weekend day	2 hours 36 minutes	2 hours 6 minutes	2 hours 36 minutes	1 hour 54 minutes
Aged 12-15				
School day	2 hours 36 minutes	1 hour 30 minutes	1 hour 48 minutes	2 hours 24 minutes
Weekend day	3 hours 54 minutes	2 hours 24 minutes	2 hours 42 minutes	3 hours 12 minutes

QP8A-B/ QP25A-B/ QP57A-B/QP66A-B How many hours would you say he/ she spends [USING MEDIUM] on a typical school day/ on a weekend day?

*Responses are taken from the child aged 8-11 or 12-15 rather than the parent. ** Parents of children aged 3-4 were asked about week day rather than school day as their child may not yet be attending school*

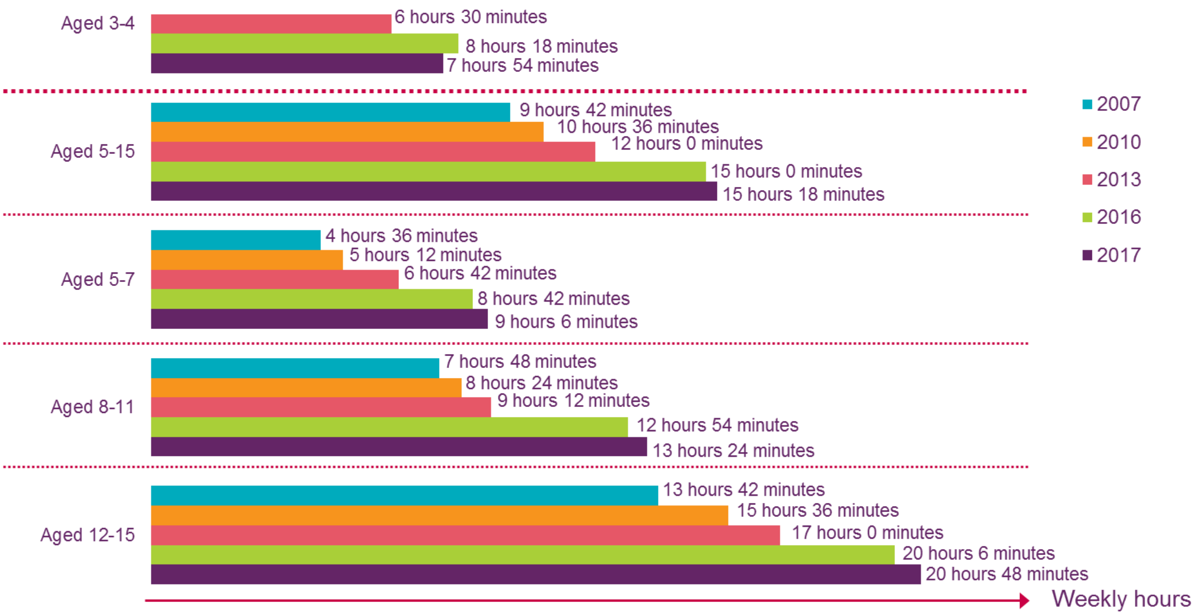
Base: Parents of children aged 3-7 and children aged 8-15 who use each medium (VARIABLE BASE).

Children aged 5-15 who use the internet spend more than 15 hours online in a typical week

The estimated weekly volume of time spent online at home or elsewhere increases with the age of the child: 7 hours 54 minutes for 3-4s, 9 hours 6 minutes for 5-7s, 13 hours 24 minutes for 8-11s and 20 hours 48 minutes for 12-15s. Children aged 5-15 who use the internet spend in total more than 15 hours online in a typical week (15 hours 18 minutes).

As shown in Figure 3, these estimates of time spent online at home or elsewhere are unchanged since 2016 for 3-4s, 5-7s, 8-11s and 12-15s, although they have increased markedly over the last decade.

Figure 3: Estimated weekly hours of internet consumption by age, at home (2007, 2010, 2013) or elsewhere (2016, 2017)



QP25A-B– How many hours would you say he/ she spends going online on a typical school day/ on a weekend day? (unprompted responses, single coded) In 2007-2012 the response for 12-15 was taken from the child and the parent for 5-7s and 8-11s. In 2007-2013 parents/ children were asked about use at home, whereas from 2014 they were asked about use at home or elsewhere.

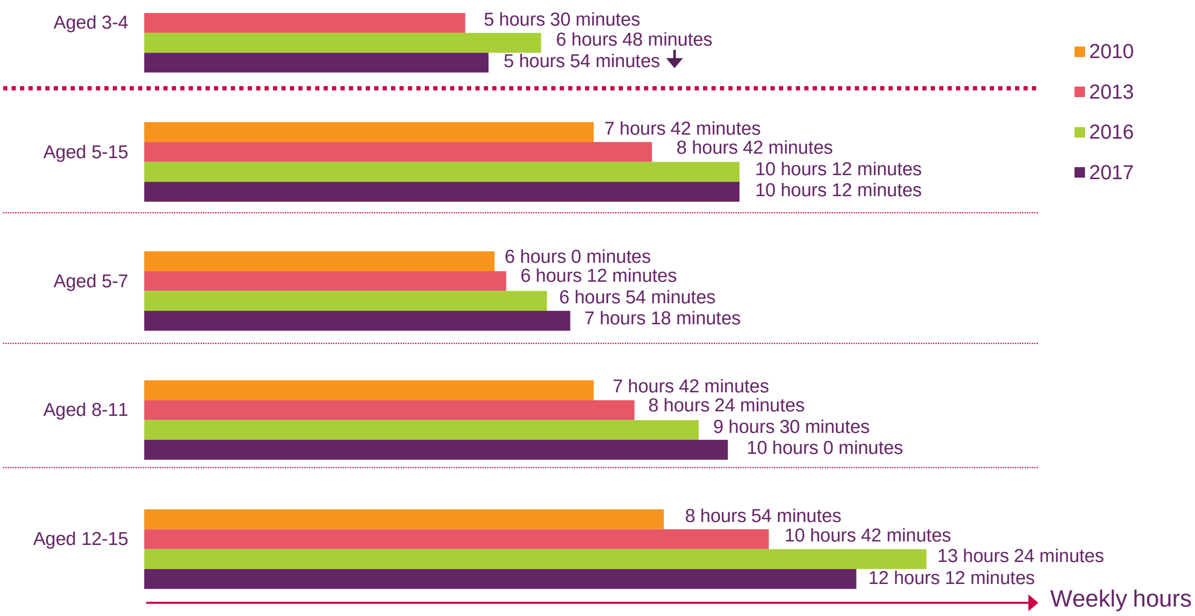
Base: Parents of children aged 3-7 who use the internet at home or elsewhere and children aged 8-15 who use the internet at home or elsewhere (VARIABLE BASE) - Significance testing shows any change between 2016 and 2017.

Children aged 5-15 who play games spend around ten hours per week gaming

As with using the internet, the estimated weekly hours spent gaming at home or elsewhere increase with the age of the child, ranging from 5 hours 54 minutes for 3-4s to 12 hours 12 minutes for 12-15s.

As shown in Figure 4, there has been no change in the estimated time spent gaming by children aged 5-7, 8-11 or 12-15, compared to 2016. Parents of 3-4s, however, give a lower estimate than in 2016 (5 hours 54 minutes vs. 6 hours 48 minutes). This decrease follows a corresponding increase in the time spent gaming among this age group between 2015 and 2016 (not shown in Figure 4); as such, the levels seen in 2017 are comparable to those for 2015 for this age group.

Figure 4: Estimated weekly hours of game playing by age at home (2010, 2013) or elsewhere (2016, 2017)



QP66A-B - How many hours would you say he/ she spends playing these games on a typical school day/ on a weekend day? (unprompted responses, single coded). In 2010-2012 the response for 12-15 was taken from the child and the parent for 5-7s and 8-11s. In 2010-2013 parents/ children were asked about use at home, whereas since 2014 they were asked about use at home or elsewhere.

Base: Parents of children aged 3-7 whose child plays games at home or elsewhere and children aged 8-15 who play games at home or elsewhere (VARIABLE BASE). Significance testing shows any change between 2016 and 2017.

Children aged 3-4 and 5-7 spend more time per week watching TV on a TV set than in 2016

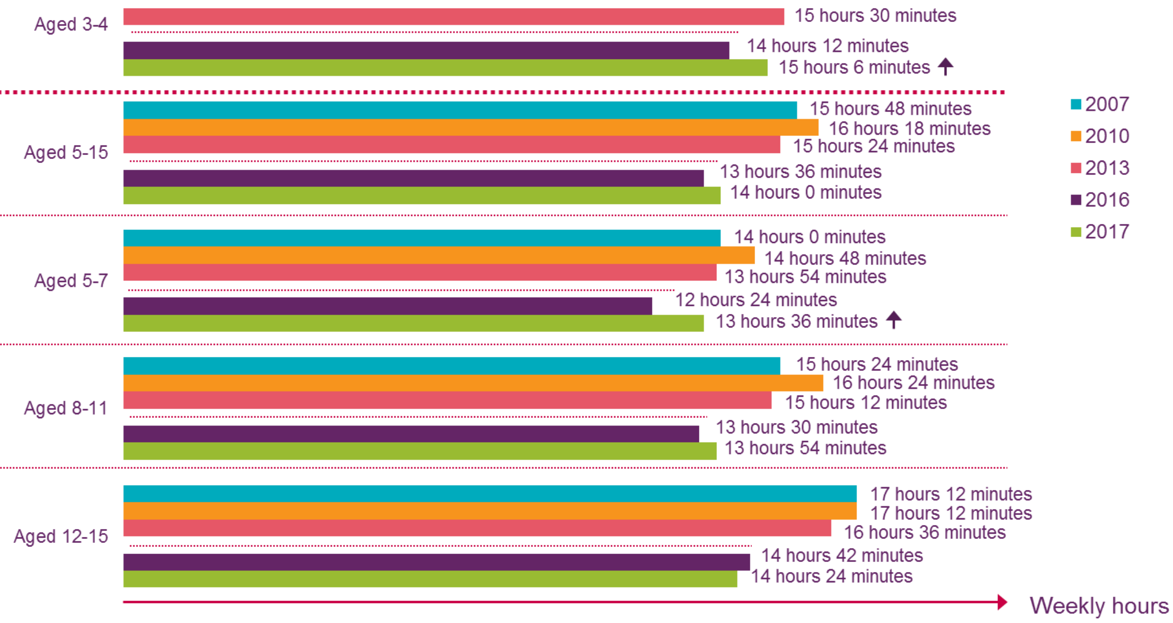
In recent years (since 2012), we have asked about hours spent watching television on any device. Since 2015, in order to reduce the overlap with estimates of time spent online, caused by the increase in online television viewing, we have asked parents of 3-4s and 5-7s and children aged 8-11 and 12-15 to estimate the amount of time they spend viewing television on a television set, as we did before 2012.

In 2017, children aged 3-4 spend more time in a typical week watching TV on a TV set than 5-7s or 8-11s, and a similar amount of time as 12-15s.

Compared to last year, there has been an increase in the hours per week spent watching TV on a TV set among the youngest children: from 14 hours 12 minutes to 15 hours 6 minutes for 3-4s and from 12 hours 24 minutes to 13 hours 36 minutes for 5-7s. There has been no change since 2016 for 8-11s or 12-15s. Looking at the longer-term trend, however, children aged 8-11 and 12-15 spend fewer hours per week watching TV on a TV set than they did in 2007.

To get a complete picture of how children are consuming television, we look later in this report at television viewing by device, as well as frequency of viewing on a TV set and on other devices.

Figure 5: Estimated weekly hours of television consumption by age, at home (2007, 2010, 2013) or elsewhere (2016, 2017)



QP8A-B – How many hours would you say he/ she spends watching TV programmes on a TV set on a typical school day/ on a weekend day? (unprompted responses, single coded). Before 2014 the response for 12-15s was taken from the child and the parent for 5-7s and 8-11s and parents/ children were asked about use at home, whereas from 2014 they were asked about use at home or elsewhere. Before 2015 responses included viewing on any type of device, not just on a TV set.

Base: Parents of children aged 3-7 who use watches television on a TV set (VARIABLE BASE) - Significance testing shows any change between 2016 and 2017.

Insight from BARB: time spent watching the TV set

We also examine 2016 data from BARB on time spent viewing (published in Annex 1 of this report) which show that children aged 4-15 watched an average of just under 12 hours of consolidated broadcast television per week in 2016 (including live viewing and time-shifted viewing up to seven days later). This was down by more than an hour per week since 2015, with the decrease coming from live viewing. In contrast, unmatched viewing, which includes subscription video-on-demand like Netflix, apps on smart TVs, DVDs and gaming, increased in 2015 and in 2016. There have also been small increases in time-shifted viewing, although these have not fully compensated for the decline in live viewing. On average, per week, children's live viewing decreased by just over an hour (1 hour 9 minutes) from 2015 to 2016, while all time-shifted viewing and unmatched viewing together increased by just over half an hour (35 minutes), with the majority of the increase coming from unmatched viewing.

When we compare these findings with the findings of our 2016 survey research, we see a similar trend. These data show parents' and children's estimates of time spent watching television on a TV set, so will include all live broadcast viewing, time-shifted viewing and some unmatched viewing (e.g. it would include use of Netflix and DVDs but not gaming). In 2016 we saw a decrease of just over an hour in the hours per week spent watching television on a TV set among all 5-15s (13 hours 36 minutes vs. 14 hours 48 minutes in 2015), with this decrease attributable to 5-7s and 8-11s. Like the BARB data, this indicates a continuation of longer-term annual falls in weekly viewing.

Children aged 12-15 say they spend around 18 hours using their mobile phone in a typical week

Parents of children aged 3-7[19], and children aged 8-11 and 12-15, were asked how many hours their child/ they spent using their mobile phone in a typical week[20]. The results for 5-15s overall and for 8-11s and 12-15s are shown in Figure 6.

Mobile phone users aged 8-11 say they spend ten hours in a typical week using their phone, lower than the estimate made by 12-15s (18 hours 12 minutes).

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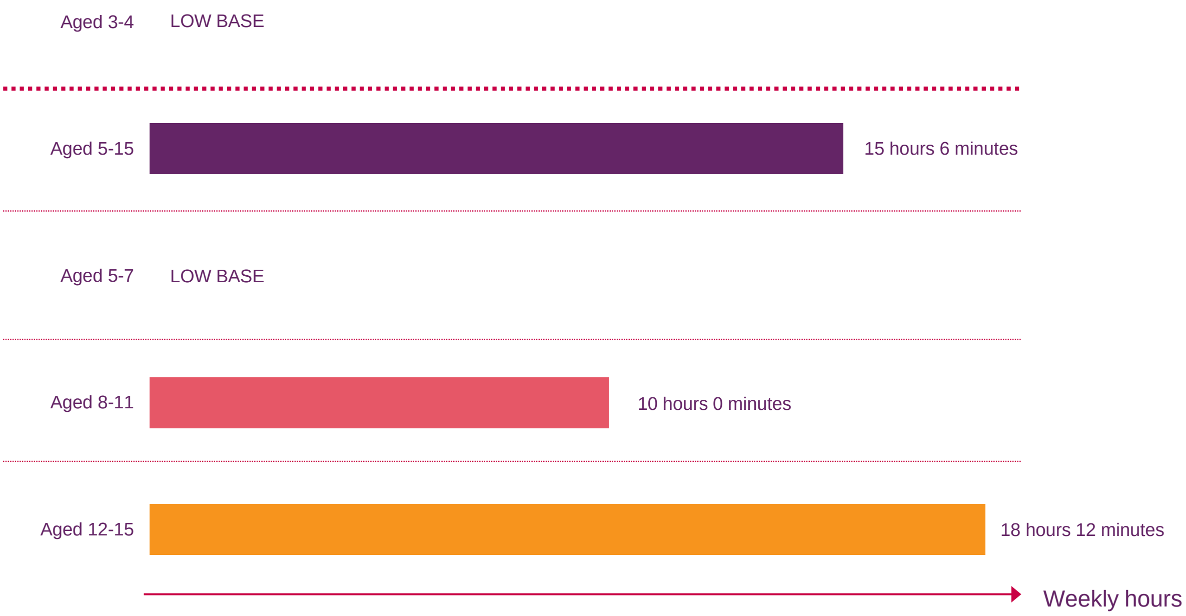
[19] Too few interviews were conducted with parents of mobile phone users aged 3-4 or 5-7 to show the data.
[20] If required, parents and children were also provided with this additional information: "This could be for calls, texts, for going online, checking social media, using other messaging apps, playing games, watching videos etc".

Figure 6: Estimated weekly hours of mobile phone use by age: 2017



QP57A-B– How many hours would you say he/ she spends using their mobile phone on a typical school day/ on a weekend day? (unprompted responses, single coded)
Base: Parents of children aged 3-7 and children aged 8-15 with a mobile phone (VARIABLE BASE).

Differences by gender and socio-economic group

Girls aged 12-15 say they spend more than 21 hours per week using their mobile phone – nearly 50% more time than boys

In 2017, boys aged 8-11 say they spend more hours online in a typical week (14 hours 24 minutes) compared to girls (12 hours 18 minutes).

Girls aged 12-15 say they spend 21 hours 30 minutes in a typical week using their mobile phone, whereas boys say they typically spend 14 hours 54 minutes using their phone.

Boys aged 5-7, 8-11 and 12-15 are more likely than girls to spend more hours in a typical week playing games, with the difference increasing with the age of the child. On average, boys aged 5-7 spend 8 hours 6 minutes playing games per week compared to 6 hours 6 minutes for girls. Boys aged 8-11 spend more than 11 hours (11 hours 36 minutes) per week playing games, compared to around eight hours for girls of this age (7 hours 54 minutes). Girls aged 12-15 spend around 8 hours per week gaming (8 hours 12 minutes) while boys of this age spend nearly 15 hours playing games (14 hours 48 minutes).

In 2017, there are no differences by gender for watching television on a TV set. There are also no differences by gender in time spent using media among children aged 3-4.

Children aged 5-15 in DE households spend more time watching TV and going online in a typical week

In 2017, compared to the average for 5-15s, children in AB households spend less time going online in a typical week (13 hours 42 minutes vs. 15 hours 18 minutes) and less time playing games (8 hours 48 minutes vs. 10 hours 12 minutes).

Children aged 5-15 in DE households spend more time compared to 5-15s overall watching TV on a TV set (15 hours 24 minutes vs. 14 hours) and more time online (17 hours vs. 15 hours 18 minutes).

Children aged 3-4 in C2DE households spend more time, in a typical week, than those in ABC1 households[21] watching TV on a TV set (15 hours 36 minutes vs. 14 hours 30 minutes) and playing games (6 hours 30 minutes vs. 5 hours 12 minutes).

[21]It is not possible to analyse the data by all four socio-economic groups for children aged 3-4 due to base sizes of fewer than 100 interviews for some of these groups. For children aged 3-4, any socio-economic group analysis therefore compares those in ABC1 households with those in C2DE households.

5. Children's use and ownership of media devices

This section looks at children's use of media devices. It documents those devices that children ever use at home, as well as those that they use on a regular basis, and looks at use within the context of the devices that children have access to at home.

It also looks more specifically at mobile phone/ smartphone ownership as well as tablet ownership, and how this varies by the age of the child.

Key findings

Use of devices

- There are two devices that continue to be used by a majority of children in each age group: television sets[22] (92% for 3-4s, 95% for 5-7s, 96% for 8-11s and 98% for 12-15s) and tablets (65% for 3-4s, 75% for 5-7s, 80% for 8-11s and 78% for 12-15s).
- Compared to last year, among 5-15s overall there has been growth in the use of mobile phones (68% vs. 62%) and a decrease in use of a games console or player (60% vs. 66%), a DVD/ Blu- ray player (51% vs. 56%) and a radio set (29% vs. 33%).
- Children aged 5-7 in particular are more likely to use a mobile phone (43% vs. 28% in 2016) and are also more likely to use a tablet computer (75% vs. 67%).
- Children age 3-4 are also more likely to use a tablet (65% vs. 55% in 2016) or a mobile phone (29% vs. 23%) and are less likely to use a games console or player (18% vs. 25%).

Access to devices at home

- Increased use of a tablet computer at home among 3-4s and 5-7s is linked to increased access to these devices.
- Among 5-15s overall the decline in use of games consoles or players at home is coupled with a decline in household ownership of these devices. For 3-4s and 8-11, however, the decrease in use is not accompanied by a decrease in ownership, suggesting children are opting to use available devices less.
- Smart TV sets are the only type of device for which household access and use has increased for 5-15s, compared to 2016.
- Compared to 2016, home access to the internet (either through fixed broadband or mobile network signal) has increased among 5-15s overall (from 94% to 96%), which has contributed to an increase in going online for this age group[23]. This increase in both access to and use of the internet is particularly true among households with children aged 5-7.

[22] Any type of television, whether a smart TV or a 'standard' TV set
[23] Increased use of the internet across all age groups is covered in more detail in the next section (Section 5)

Regular use of devices

- Regular use of a TV set is unchanged compared to 2016 for any age group of child, ranging from 85% for 5-7s to 69% for 12-15s.
- Children aged 12-15 are more likely than in 2016 to say they regularly use a mobile phone (86% vs. 75%). This increase means that 12-15s are now more likely to say they regularly use a mobile phone than a TV set, unlike in 2016 when the numbers regularly using each device were similar.
- Regular use of a tablet has increased for 5-7s (52% vs. 37%).
- A sizeable proportion of children in each age group say they regularly use books, magazines or comics (42% aged 5-7, 39% of 8-11s and 30% of 12-15s). Children aged 5-15 overall are more likely to say they regularly do this, compared to last year (36% vs. 32%).

Child's ownership of devices

- Smartphone ownership is higher among 5-15s compared to last year (46% vs. 41%), with this increase evident among 5-7s (5% vs. 2%) and 8-11s (39% vs. 32%).
- Tablet ownership has increased among 5-15s overall compared to 2016 (49% vs. 44%) although this is not attributable to any particular age group of child. One in five children aged 3-4 (21%) have their own tablet, an increase from 16% in 2016. This rises to more than one in three for 5-7s (35%), and to more than half of all 8-11s (52%) and 12-15s (55%).

Differences by gender

- As in previous years, boys continue to be more likely than girls to own and use games consoles or players.

Differences by household socio-economic group

- Children aged 5-15 in DE households are less likely than average to have access to and to use a wider range of devices, but they are equally likely to have their own tablet or smartphone.

Children's media use in the home

Compared to 2016, there has been growth in the use of mobile phones and smart TVs

This initial section looks at the specific devices children use, with subsequent sections addressing the devices that are used regularly, as well as household and children's ownership of media devices.

Parents were asked about their child's use of the various media within the home, regardless of whether the media devices were owned by the child or more generally by the household. Figure 7 shows the media used by all children aged 5-15, while Figure 8 shows the key media used by 3-4s, 5-7s, 8-11s and 12-15s.

Nearly all children aged 5-15 (96%) use a television set, with this incidence unchanged both at an overall level and for each of the three age groups, compared to 2016. More than nine in ten parents of 3-4s (92%) say their child uses a television set, also unchanged compared to 2016.

The measures shown for the television set in Figure 7 and Figure 8 are aggregate figures based on respondents who said their child used any type of television set, whether a smart TV or a standard TV. Looking at the figures for smart TVs separately, more than four in ten 3-4s (46%) and half of 5-15s (51%) use one. Compared to 2016, use of a smart TV has increased for 5-15s (from 47%), although this is not attributable to any specific age group of child, and smart TV use has not increased among 3-4s.

Apart from a TV set, the only other device used by a majority of children in each of the four age groups is the tablet. More than three in four 5-15s (78%) use a tablet, as do close to two in three (65%) of 3-4s. Use does not vary by age among 5-15s but is lower for 3-4s. Compared to last year, use of a tablet at home is more likely for the youngest children (65% vs. 55% for 3-4s and 75% vs. 67% for 5-7s).

Seven in ten children aged 5-15 use an internet-connected desktop/ laptop/ netbook (69%). Use of an internet-enabled desktop/ laptop/ netbook at home increases with age and rises from one in four 3-4s (23%) to more than four in ten 12-15s (82%). Use of this device among 8-11s increased compared to 2016 (from 66% to 74%), following a corresponding decrease between 2015 and 2016 (from 77% to 66%)[24].

Seven in ten children aged 5-15 also use a mobile phone (68%), and use increases with age, rising from 29% of 3-4s to 93% of 12-15s[25]. Use among 5-15s has increased compared to last year (from 62%), attributable to 5-7s (43% vs. 28%). Children aged 3-4 are also more likely than in 2016 to use a mobile phone (29% vs. 23%).

Three in five 5-15s use a digital video recorder (DVR) (63%) or a games console or games player (like a PlayStation, Xbox, Wii, Nintendo DS or PS Vita) (60%). Use of a DVR or a games console/ player is more likely among older children (8-15s) than among younger children (3-7s). While there is no change in use of a DVR among 5-15s, 8-11s say they are more likely to use one (66% vs. 59% in 2016), although this also follows a corresponding decrease for 8-11s, from 68% in 2015. Compared to 2016, use of games consoles or players has decreased among 5-15s (from 66%). This is evident among 5-7s (43% vs. 52%) and 8-11s (66% vs. 74%). Children aged 3-4 are also now less likely to use one of these gaming devices (18% vs. 25%).

Half of 5-15s use a DVD/ Blu-ray player (51%), a decrease from 56% in 2016. This decrease among 5-15s overall is only evident among 12-15s (52% vs. 59% in 2016). Use of a DVD/ Blu-ray player is lowest for 3-4s (42%) but does not vary within age among 5-15s.

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[24] The data for 2015 are not shown in this report in order to show a trend over a longer time-period than the previous three years. In some instances, changes between 2016 and 2017 need to be viewed in a wider context, as they could be returning to levels seen in the previous year (2015). As is the case, here the increase seen between 2016 and 2017 was accompanied by a corresponding decrease between 2015 and 2016. Instances like this will be flagged in the narrative where this occurs across key measures in this report.

[25] Children's use of a mobile phone includes circumstances in which the child may be using a mobile phone that belongs to someone else in the household.

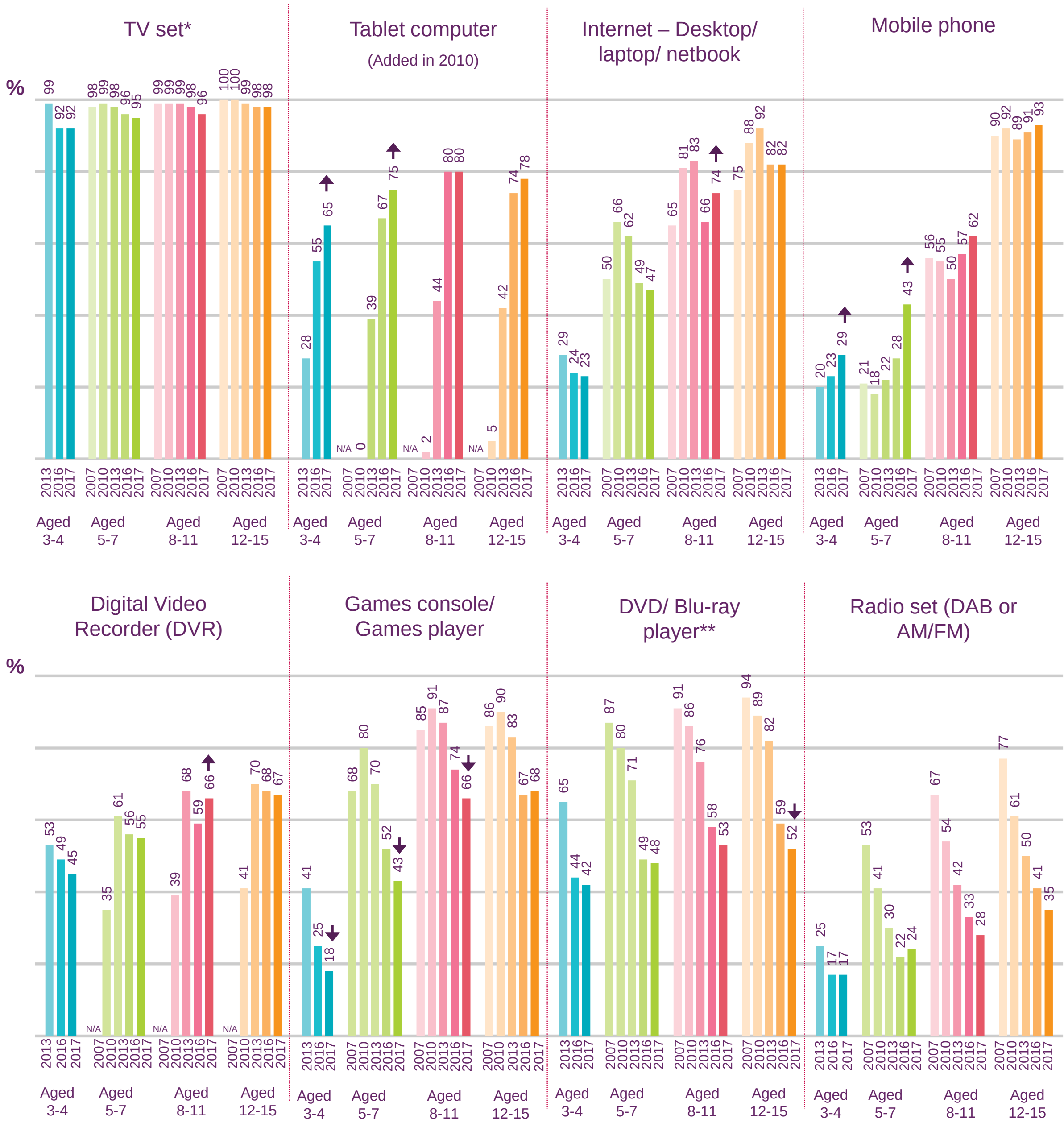
Three in ten 5-15s use a radio set (either DAB or AM/FM) (29%), a decrease compared to 2016 (33%), although there has been no change among 3-4s (17%), 5-7s (24%), 8-11s (28%) or 12-15s (35%).

Figure 7: Media used by children aged 5-15 at home: 2007, 2010, 2013, 2016 and 2017

*QP3A-I – I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use. (prompted responses, single coded) * Since 2014 this measure includes those who say they use either a smart TV or a 'standard 'TV set; before this we asked only about a TV set. ** Before 2016 this question was asked about a DVD player/ DVD recorder/ Blu-ray recorder (fixed or portable).*

Base: Parents of children aged 5-15 (1388) - significance testing shows any change between 2016 and 2017.

Figure 8: Media used by children at home, by age: 2007, 2010, 2013, 2016 and 2017



QP3A-I I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use. (prompted responses, single coded). *Since 2014 this measure includes those who say they use either a Smart TV or a 'standard 'TV set, prior to this we asked only about a TV set. ** Before 2016 this question was asked about a DVD player/ DVD recorder/ Blu-ray recorder (fixed or portable).

Base: Parents of children aged 3-4 (677) or 5-15 (412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

Use of devices in the context of household ownership

Smart TV sets are the only device for which access and use among 5-15s has increased since last year; access to and use of a tablet has increased for 3-4s

Children's use of media cannot be addressed in isolation; it should be framed within the context of the devices that are available within the home for the child to use.

Figure 9 below summarises children's access to[26] and use of devices at home, ranked by access to the device for children aged 5-15. For most devices, the difference or 'gap' between access and use tends to get narrower as the age of the child increases.

Broadly speaking, for younger children (3-4s and 5-7s) the difference between access and use tends to be smallest for TV sets (either standard or smart) and largest for radio and for desktop computers, laptops or netbooks. For older children, the gap between access and use tends also to be largest for radio and smallest for TV sets (either standard or smart).

Figure 9 below also shows changes in any of these measures compared to 2016. Some of the key changes are summarized below:

- The increase in use of a tablet among 3-4s and 5-7s is accompanied by increased access to these devices at home, as is the increased use of smart TVs among 5-15s.
- The decrease seen in use of a games console or games player among 3-4s and 8-11s is not accompanied by a decrease in home access to these devices for these age groups, suggesting that children are opting to use these devices less.
- The decrease in use of radio sets corresponds with households with children aged 5-15 being less likely to own this device.
- The increase in use of a mobile phone at home has not been matched by an increase in personal ownership of a mobile phone, suggesting that children at home are using mobile phones owned by other family members.

Figure 9 below also shows the proportion of children in each age group who have access to the internet at home (either through a fixed broadband connection or a mobile network signal) as well as the proportion who use the internet (at home or elsewhere). The gap between access and use narrows as the child ages. Compared to 2016, home access has increased among 5-15s overall and among 5-7s in particular. For both these age groups there has also been an increase in use of the internet (at home or elsewhere).

[26] For mobile phones the percentages shown in the 'access' columns relate to personal ownership of a mobile phone rather than household ownership. The percentages shown for use are higher than those shown for personal ownership, as this includes use of mobiles within the household that are not directly owned by the child.

Figure 9: Summary of access to and use of devices/ media at home, by age: 2017

All children	Aged 3-4		Aged 5-15		Aged 5-7		Aged 8-11		Aged 12-15	
	Access	Use	Access	Use	Access	Use	Access	Use	Access	Use
Tablet computer	86% ↑	65% ↑	86% ↑	78%	86% ↑	75% ↑	86%	80%	85%	78%
Desktop computer/ laptop/ netbook- with internet access	73%	23%	83%	69%	75%	47%	84% ↑	74% ↑	88%	82%
Standard TV set	74% ↓	66% ↓	82% ↓	78% ↓	81%	76%	83% ↓	80% ↓	80% ↓	77% ↓
Games console/ player	48%	18% ↓	72%	60% ↓	59% ↓	43% ↓	76%	66% ↓	77%	68%
Digital Video Recorder (DVR)	69%	45%	71%	63%	66%	55%	72%	66% ↑	73%	67%
DVD / Blu–ray player	63%	42%	64%	51% ↓	62%	48%	64%	53%	65%	52% ↓
Radio	54%	17%	58% ↓	29% ↓	56%	24%	58%	28%	60% ↓	35%
Smart TV set	56% ↑	46%	56% ↑	51% ↑	54%	47%	56%	51%	58%	54%
Mobile phone	1%	29% ↑	49%	68% ↑	8%	43% ↑	44%	62%	86%	93%
Any standard/ smart TV	98%	92%	99%	96%	98%	95%	98%	96%	99%	98%
ANY INTERNET	81%	53% ↑	96% ↑	92% ↑	92% ↑	79% ↑	96%	94% ↑	99%	99%

QP3 - I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use. (prompted responses, single coded).

Base: Parents of children aged 3-4 (677) or 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

Regular use of media devices

Half of children aged 5-15 regularly use a TV set, mobile phone or tablet

Children aged 5-15 were asked to choose from a list of nine media devices to say which, if any, they used regularly (defined in this research as 'almost every day'). As this question was asked of children (rather than parents) no data are available for children aged 3-4. These nine devices are mostly a subset of those their parents were asked about in Figure 7 and Figure 8, and were selected as those devices that would be easily recognisable to children of all ages.

Figure 10 shows the findings among 5-7s, 8-11s, 12-15s and for 5-15s overall.

The TV set is the only media device used regularly by more than half of all children in each age group between 5 and 15. More than three in four (77%) children aged 5-15 say they regularly use a TV set, and use decreases with age, ranging from 85% for 5-7s to 69% for 12-15s. Regular use for each age group is unchanged compared to 2016.

Half of 5-15s (50%) regularly use a mobile phone or smartphone. This incidence varies considerably by age, accounting for one in five for children aged 5-7 (20%), close to two in five 8-11s (38%) and more than four in five 12-15s (86%). Regular use of a mobile phone has increased among 5-15s compared to last year (50% vs. 44%) with this increase attributable to 12-15s (86% vs. 75%).

Half of 5-15s (50%) also say they regularly use a tablet, and this is as likely for 5-7s (52%) as for 8-11s (52%), while 12-15s (46%) are less likely than 8-11s (52%) to regularly use a tablet. Regular use of a tablet has increased since 2016 among 5-15s (from 44%), with this increase apparent only among 5-7s (52% vs. 37% in 2016).

Each of the other media shown in Figure 10 are used regularly by less than half of 5-15s. One in three 5-15s regularly use books, magazines or comics[27] (36%); more likely than in 2016 (32%). As in 2016, this is more likely for 5-7s (42%) and 8-11s (39%) than for 12-15s (30%).

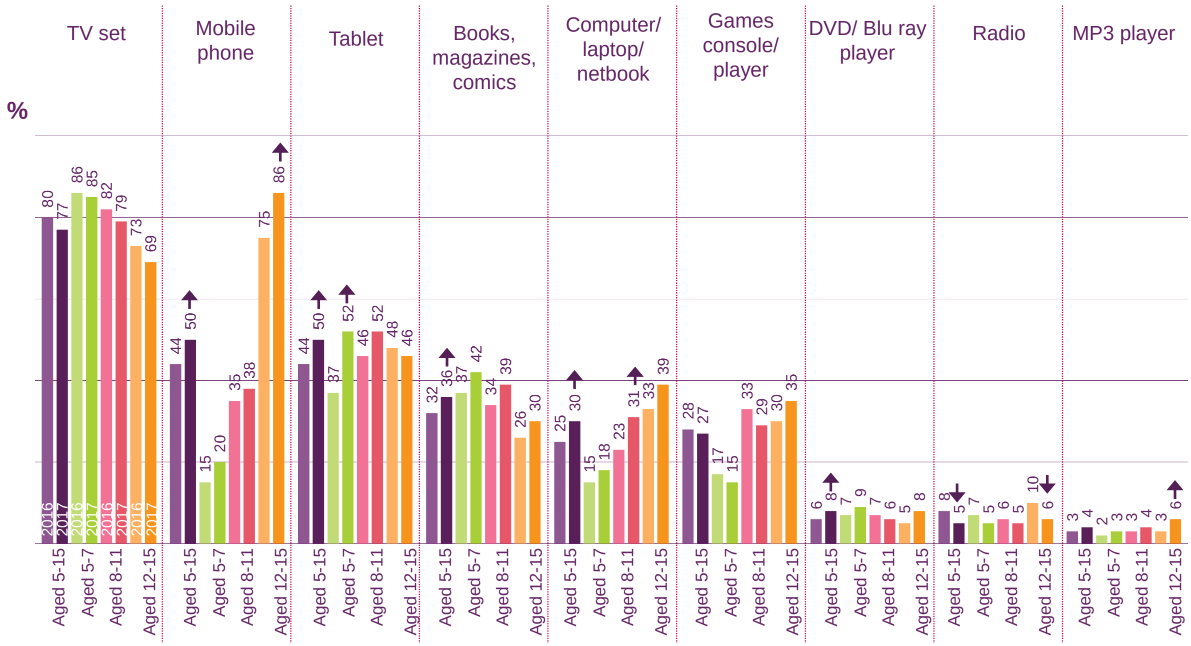
Three in ten 5-15s say they regularly use a desktop computer, laptop or netbook; this has increased since 2016 (30% vs. 25%), particularly among 8-11s (31% vs. 23%). These increases for 5-15s overall and for 8-11s both follow corresponding decreases in regular use between 2015 and 2016. As in 2016, however, use of a desktop/ laptop/ netbook computer increases with the age of the child, rising from 18% for 5-7s to 39% among 12-15s

Around one in four 5-15s regularly use games consoles or players (27%), unchanged since last year. Regular use continues to be less likely for 5-7s (15%) than for 8-11s (29%) or 12-15s (35%).

DVD/ Blu-ray players (8%), radios (5%) and MP3 players (4%) are used regularly by less than one in ten 5-15s; use of DVD/ Blu-ray players is more likely than in 2016 (6%) and regular radio use is less likely (8% in 2016).

[27] The question did not specify whether this related to physical or electronic copies of books, magazines or comics.

Figure 10: Regular use of media devices, by age: 2016 and 2017



QC50 – Which of the following do you use almost every day? (prompted responses, multi-coded).

Base: Children aged 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

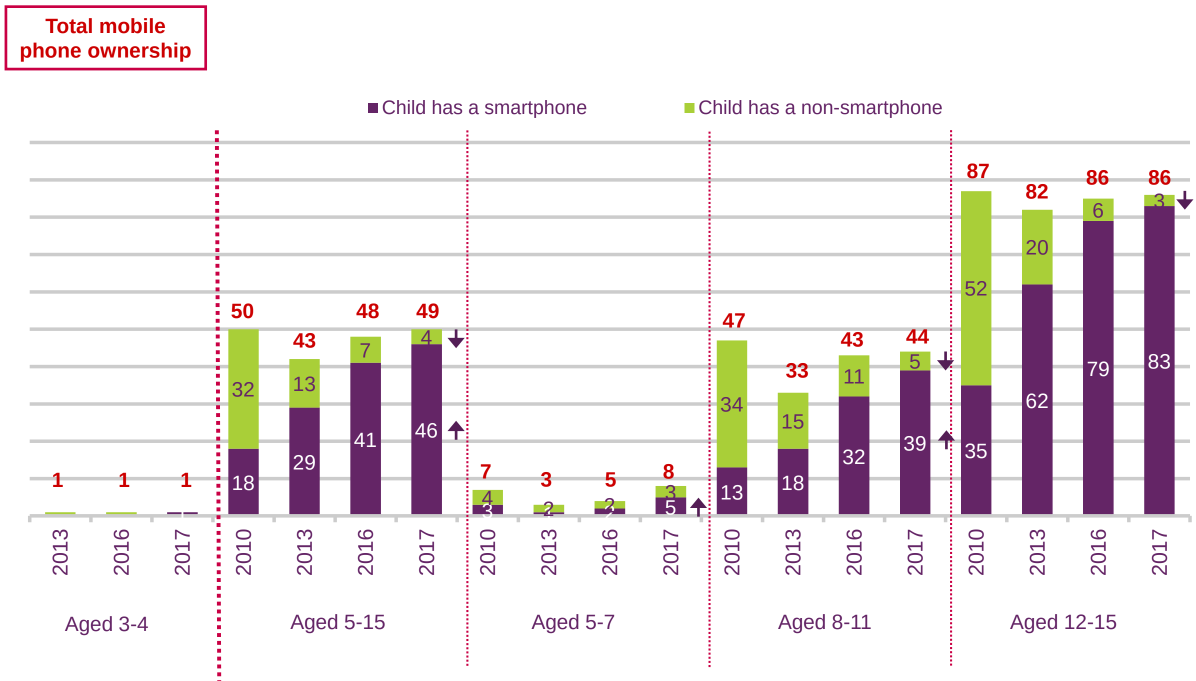
Mobile phone ownership

Smartphone ownership has increased to close to half of 5-15s, driven by increases among 5-7s and 8-11s

Figure 11 shows that half of all children aged 5-15 (49%) have a mobile phone of their own (any type) and nearly all of them (46%) have a smartphone.[28]

Smartphone ownership is higher compared to last year among all 5-15s (46% vs. 41%), with this increase evident among 5-7s (5% vs. 2%) and 8-11s (39% vs. 32%). The likelihood of owning a smartphone increases with the age of the child, at just 1% of 3-4s, 5% of 5-7s, four in ten 8-11s (39%) and more than eight in ten 12-15s (83%).

Figure 11: Smartphone and non-smartphone ownership, by age: 2010, 2013, 2016 and 2017



QP3F/ QP4 - I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use (prompted responses, single coded)/ You mentioned that your child has their own mobile phone. Is this a smartphone? A smartphone is a phone on which you can easily access emails, download apps/ applications and other files as well as view websites and generally surf the internet/ go online. Popular brands of smartphone include iPhone, BlackBerry and Android phones such as the Samsung Galaxy. (unprompted responses, single coded)

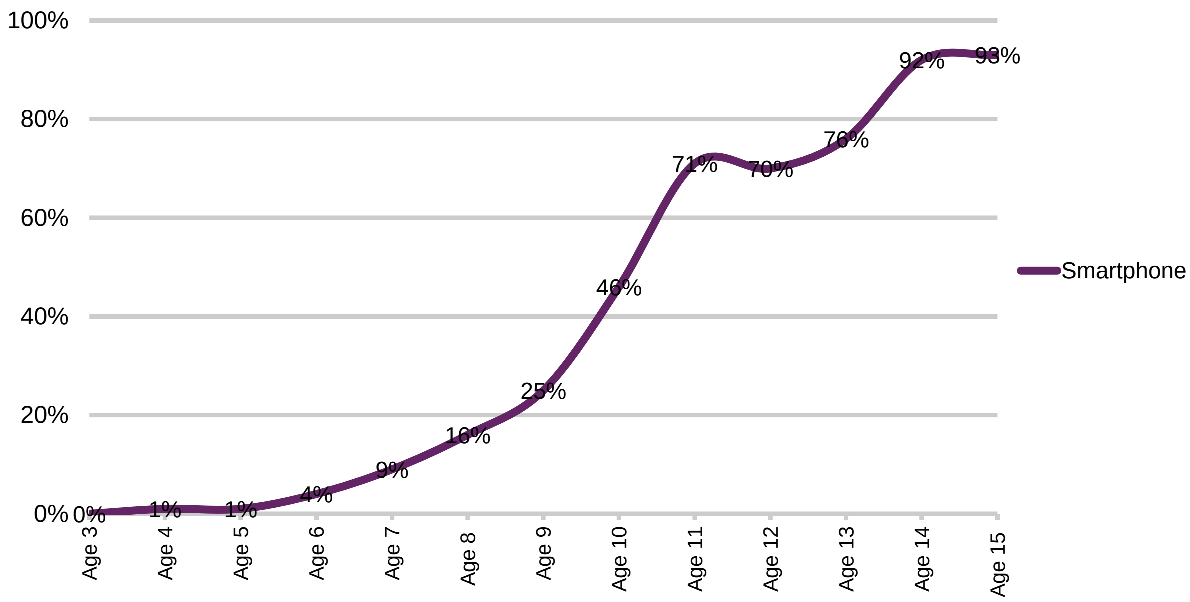
Base: Parents of children aged 3-4 (677) or 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

[28] The question (to parents) established smartphone ownership in the following way: "You mentioned that your child has their own mobile phone. Is this a smartphone? A smartphone is a phone on which you can easily access emails, download apps/ applications and other files, as well as view websites and generally surf the internet/ go online. Popular brands of smartphone include iPhone, BlackBerry, and Android phones such as the Samsung Galaxy".

Figure 12 shows how smartphone ownership increases from age 3 (0%) to age 15 (93%). Levels of ownership of a smartphone are very low among those aged up to 6 and start to rise from age 7.

Between the ages of 9 and 10 smartphone ownership increases by 21 percentage points; from 25% to 46%. This increases again by a further 25 percentage points between the age of 10 (46%) and 11 (71%)[29].

Figure 12: Smartphone ownership, by age of child: 2017



QP3F/ QP4 - I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use (prompted responses, single coded)/ You mentioned that your child has their own mobile phone. Is this a smartphone? A smartphone is a phone on which you can easily access emails, download apps/ applications and other files, as well as view websites and generally surf the internet/ go online. Popular brands of smartphone include iPhone, Blackberry, and Android phones such as the Samsung Galaxy. (unprompted responses, single coded)

Base: Parents of children aged 3-4 or 5-15 (351 aged 3, 326 aged 4, 169 aged 5, 129 aged 6, 114 aged 7, 175 aged 8, 123 aged 9, 102 aged 10, 97 aged 11, 162 aged 12, 101 aged 13, 108 aged 14, 108 aged 15).

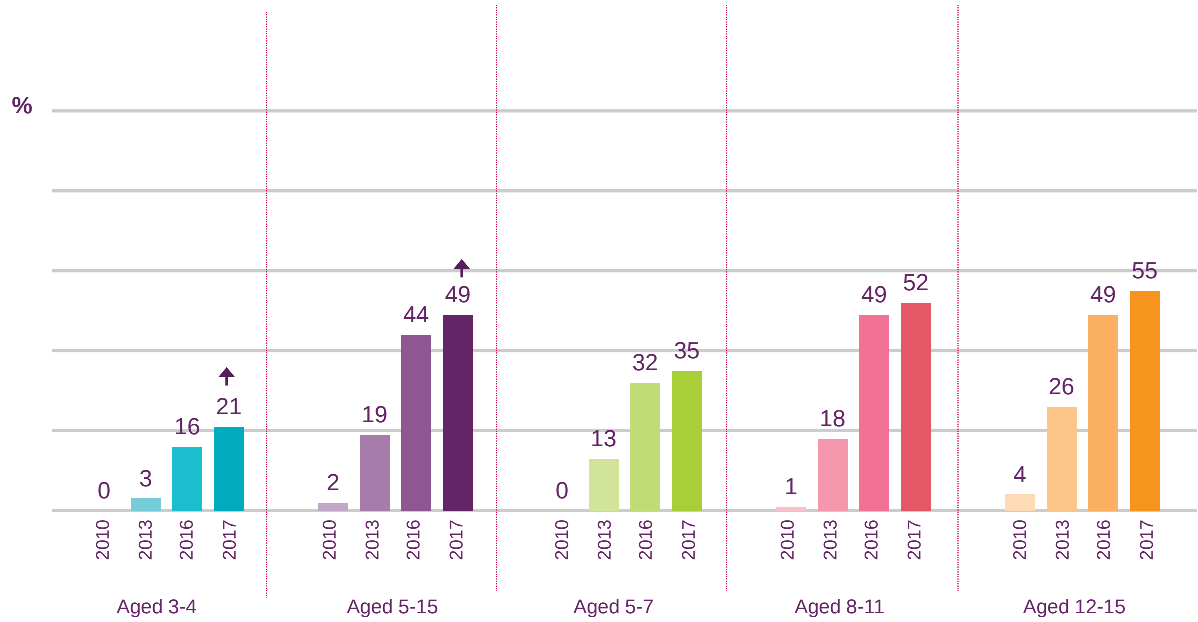
[29]Results are indicative only in 2017 for children aged 11, due to a relatively low base (97)

Tablet ownership

One in five 3-4s and more than half of 8-11s and 12-15s have their own tablet

Figure 13 shows the incidence of tablet ownership among children, rather than household ownership. In 2017, tablets are owned by one in five 3-4s (21%) and half of 5-15 year olds (49%). Ownership is higher among 8-11s (52%) and 12-15s (55%) than among 5-7s (35%). Compared to 2016, tablet ownership has risen for 3-4s (21% vs. 16%) and among all children aged 5-15 (49% vs. 44%). This increase in ownership among 5-15s is not attributable to any particular age group.

Figure 13: Tablet ownership, by age of child: 2010, 2013, 2016 and 2017



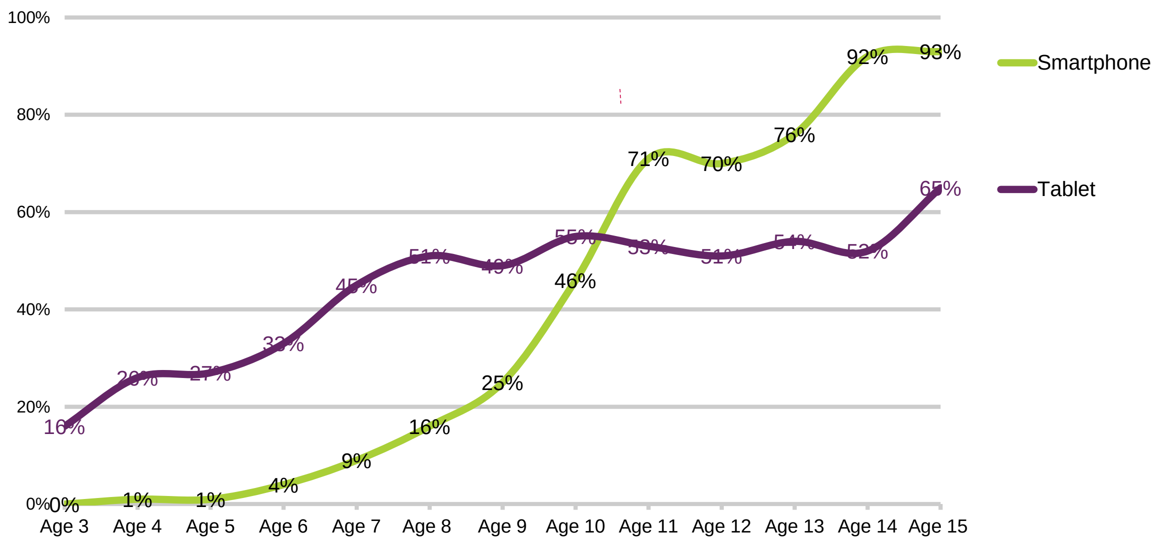
QP3E - I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use (prompted responses, single coded)

Base: Parents of children aged 3-4 (677) or 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

Figure 14 below shows how tablet and smartphone ownership varies by the age of the child. Tablet ownership is higher up to the age of 10. By the aged of 11[30] there is a clear preference for ownership of smartphones over tablets.

[30] Results are indicative only in 2017 for children aged 11, due to a relatively low base (97)

Figure 14: Tablet and smartphone ownership, by age of child: 2017



QPE3E/F/QP4 - I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use (prompted responses, single coded)/ You mentioned that your child has their own mobile phone. Is this a smartphone? A smartphone is a phone on which you can easily access emails, download apps/ applications and other files, as well as view websites and generally surf the internet/ go online. Popular brands of smartphone include iPhone, Blackberry, and Android phones such as the Samsung Galaxy. (unprompted responses, single coded)

Base: Parents of children aged 3-4 or 5-15 (351 aged 3, 326 aged 4, 169 aged 5, 129 aged 6, 114 aged 7, 175 aged 8, 123 aged 9, 102 aged 10, 97 aged 11, 162 aged 12, 101 aged 13, 108 aged 14, 108 aged 15).

Children's ownership of multiple media devices

Most children aged 12-15 have three or more media devices of their own

Focusing on how many of the nine[31] media devices we asked about are owned by children themselves, more than one in three children aged 3-4 (36%) own any of the devices asked about, compared to more than half aged 5-7 (55%), eight in ten 8-11s (81%) and more than nine in ten 12-15s (94%).

Most children aged 12-15 (64%) have three or more devices of their own, but this degree of multiple device ownership applies to less than half of 8-11s (45%) and a minority of 5-7s (19%) and 3-4s (5%).

The average number of devices owned by the child increases with each age group: 0.6 for 3-4s, 1.2 for 5-7s, 2.4 for 8-11s and 3.2 for 12-15s.

[31] In 2016 we asked about 11 devices, rather than nine in 2017. The figures are therefore not directly comparable.

Differences by gender and socio-economic group

Boys are more likely than girls to own and use games consoles or players

In addition to looking at media use, access and ownership among children by age, it is important to understand how, if at all, these differ by gender and socio-economic group.

Where differences in device use exist by gender, this is mostly related to use of a gaming device.

Parents of boys aged 5-15 are more likely than parents of girls to say their child uses a games console or games player, whether 5-7s (55% vs. 32%), 8-11s (81% vs. 51%) or 12-15s (88% vs. 47%). Girls aged 8-11 are more likely than boys to use a tablet (83% vs. 77%), while girls aged 12-15 are more likely than boys to use a radio (39% vs. 30%). Boys in each of the age groups are also more likely than girls to say they regularly use a games console/ player, while girls aged 8-11 are more likely than boys to say they regularly use books, magazines or comics (45% vs. 32%). Boys aged 5-7 are more likely than girls to say they regularly use a computer/ laptop/ netbook (23% vs. 14%).

There are no differences in ownership of mobile phones or tablets by gender for any age group of child. However, in 2017, the average number of devices owned by boys aged 12-15 is higher than for girls (3.5 vs. 3.0); mainly because boys are more likely to have their own games console or games player.

While children aged 5-15 in DE households are less likely than average to have access to and use several devices, they are as likely to have their own smartphone and tablet

In summary, when looking at household socio-economic group, children aged 5-15 in DE households are less likely to have access to and to use some devices; the reverse is true for those in AB households. However, this difference for children in DE households is not evident when looking at the child's personal ownership of devices.

Looking first at household ownership, there are three devices that parents in DE households are less likely to own, compared to parents of 5-15s overall: a tablet computer (80% vs. 86%), an internet-enabled desktop/ laptop/ netbook computer (72% vs. 83%), and a DVR (60% vs. 71%). In contrast, compared to parents of all 5-15s, those in AB households are more likely to own these devices at home: a tablet computer (91% vs. 86%), an internet-enabled desktop/ laptop/ netbook computer (94% vs. 83%), and a DVR (80% vs. 71%).

This lower ownership in DE households leads to lower use of those devices among children aged 5-15 in these households: for a tablet computer (71% vs. 78%) an internet-enabled desktop/ laptop/ netbook computer (58% vs. 69%), a DVR (51% vs. 63%), and a DVD/ Blu Ray player (45% vs. 51%). Similarly, the higher levels of ownership in AB households leads to higher use of two of those devices among 5-15s in AB households: an internet-enabled desktop/ laptop/ netbook computer (80% vs. 69%) and a DVR (71% vs. 63%).

Personal ownership of a mobile phone does not vary by socio-economic group, and 5-15s in DE households (42%) are as likely as the average (46%) to own a smartphone, as are 5-15s in AB households (48%). Children aged 5-15 in DE households (48%) are as likely as all children to have their own tablet (49%), as are 5-15s in AB households (49%). There is no single device that children in DE households are less likely to own personally.

Children aged 3-4 in ABC1 households[32] are more likely than those in C2DE households to have access at home to five devices: a tablet computer (91% vs. 81%), an internet-enabled desktop computer, a laptop or netbook (85% vs. 61%), a DVR (77% vs. 62%), a smart TV set (64% vs. 49%) and a radio set (60% vs. 47%).   Use of these same five devices is also higher among 3-4s in ABC1 households.

While 3-4s in ABC1 households are more likely to have access to and to use devices in the home, they are less likely have their own tablet (17% vs. 25% in ABC1 households).   In fact, while two in five 3-4s in C2DE households (42%) own any of the nine devices asked about, this is less likely among those in ABC1 households (29%).

[32] It is not possible to analyse the data by all four socio-economic groups for children aged 3-4 due to base sizes of less than 100 interviews for some of these groups. For children aged 3-4, any socio-economic group analysis therefore compares those in ABC1 households to those in C2DE households.

6. Children's device preferences and affinity

This section looks at children's use of media devices. It documents the devices that children ever, and mostly, use to watch television programmes or films, and how frequently children watch this type of content on a TV set and on devices other than a TV set.

It looks first at the overall incidence of internet use at home or elsewhere, together with the devices used to go online, and at the devices mostly used to watch content on the YouTube website or app.

It then looks at the devices used for gaming, and the devices children say they would miss the most.

Key findings

Devices used to watch TV programmes or films

- Although nine in ten children aged 12-15 (91%) ever watch TV programmes or films on a TV set this is lower than in 2016 (95%). Children aged 12-15 are also less likely to say they 'mostly' watch TV content on a TV set: 62%, down from 75% in 2016.
- More than four in ten children aged 12-15 (43%) ever watch TV content on a mobile phone, and twice as many as last year say they 'mostly' watch on a mobile phone (12% vs. 6% in 2016).
- The incidence of watching content on a TV set is unchanged for 3-4s, 5-7s and 8-11s, but the youngest children (aged 3-4 and 5-7) are now more likely to watch TV programmes or films on devices other than a TV set; this increase is attributable to their being more likely to watch on a tablet (33% vs. 27% in 2016 for 3-4s and 38% vs. 30% for 5-7s).
- Over a third (34%) of 3-4s and nearly half of 5-15s (46%) watch TV content on devices other than a TV set at least weekly; 15% of 3-4s and one in five (20%) of 5-15s watch daily.

Using the internet, and devices used to go online

- More 3-4 and 5-7s are online than in 2016, with increases of more than ten percentage points for both these age groups. Half of 3-4s are now online (53% from 41% in 2016) as are four in five 5-7s (79% vs. 67%). More than nine in ten 8-11s (94%) are online in 2017, up from 90% in 2016. Nearly all 12-15s are online (99%), unchanged since last year.
- The increase in the number of internet users is driven by increased use of a tablet to go online among 3-4s (43% vs. 30% in 2016), 5-7s (58% vs. 45%) and 8-11s (67% vs. 57%). Compared to last year, 3-4s (71% vs. 62%) and 5-7s (63% vs. 53%) are now more likely to 'mostly' use a tablet to go online.
- Children aged 5-7 are also more likely to use a mobile phone to go online (26% vs. 20%), as are 12-15s (78% vs. 71%).

Devices used for gaming

- The overall incidence of gaming is unchanged for 3-4s (40%), 5-7s (66%), 8-11s (81%) and 12-15s (77%).
- Gaming on a games console is less likely than in 2016 for 5-15s (46% vs. 50%), attributable to a decrease among 5-7s (26% vs. 38%). Children aged 3-4 are also less likely to play games on a games console (7% vs. 14%).

Media affinity

- A mobile phone is the most-missed media device among 5-15s (29%) with this rising to three in five 12-15s (57%). Both these measures have increased since last year – from 25% and 49% respectively.
- This is the first time that more children aged 5-15 nominate a mobile phone than a TV set as their most-missed device, although for 5-7s and 8-11s the TV set remains the most-missed device (42% for 5-7s, 27% for 8-11s).

Differences by gender

- Boys aged 5-7, 8-11 and 12-15 are more likely than girls to play games – particularly on a games console. Older boys (aged 8-11 and 12-15) are also more likely than girls to watch TV content or to go online using a games console.
- Girls aged 8-11 (22% vs. 14%) and 12-15 (68% vs. 47%) are more likely than boys to say they would miss their mobile phone the most, and girls aged 12-15 are more likely to watch TV programmes or films on their mobile phone (48% vs. 39%) and to say they mostly use a mobile to go online (57% vs. 41%).

Differences by household socio-economic group

- Children aged 5-15 in DE households are less likely than average to use a TV set to watch TV programmes or films (89% vs. 94% overall).
- Compared to the average, children aged 5-15 in DE households are as likely to go online, but are less likely to go online on a laptop or netbook (55% vs. 73%) or on a tablet (54% vs. 70%).

Devices used to watch television programmes or films

Children aged 12-15 are less likely than in 2016 to watch television programmes or films on a TV set

Figure 15 shows responses for all 5-15s as to which devices the child ever uses to watch television programmes or films at home or elsewhere, while Figure 16 shows responses among 3-4s, 5-7s, 8-11s and 12-15s.

As shown in Figure 15, more than nine in ten children aged 5-15 (94%) ever watch TV programmes or films at home or elsewhere on a TV set; this is less likely than in 2016 (96%). As shown in Figure 16, this change is evident only among 12-15s (91% vs. 95%).

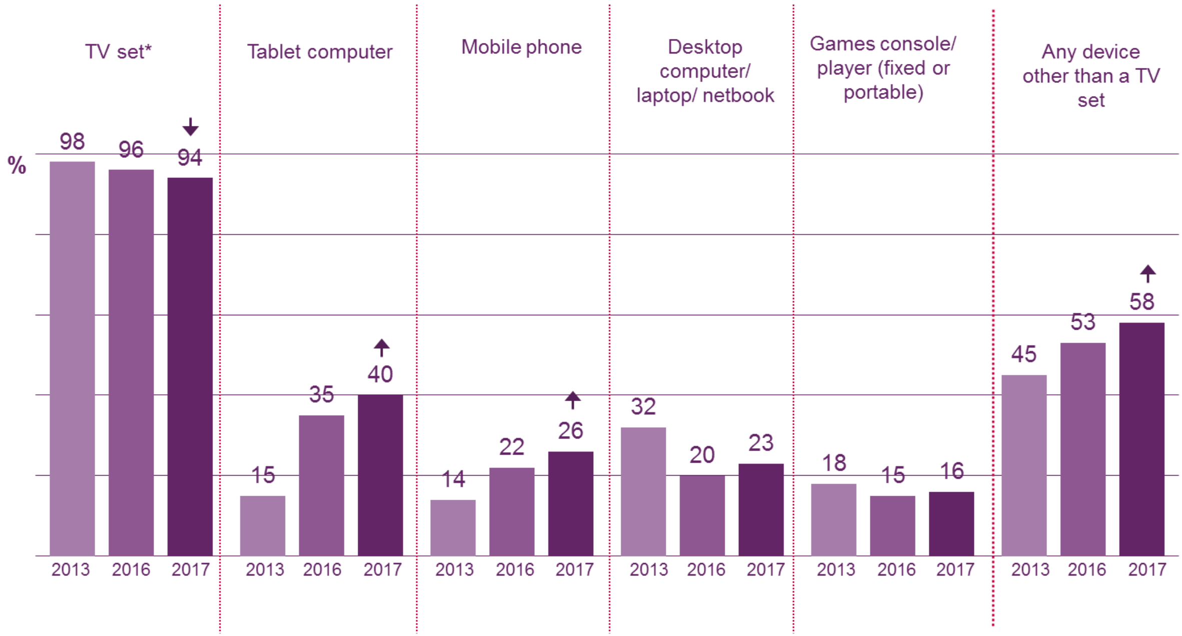
Children aged 5-15 are now more likely to watch television programmes or films on devices other than a TV set; close to three in five children aged 5-15 use an alternative device (58% vs. 53% last year). Using an alternative to a TV set to watch TV programmes or films is higher than in 2016 for the youngest children (41% vs. 34% for 3-4s and 49% vs. 41% for 5-7s) and for 12-15s (68% vs. 61%).

There has been an increase since 2016 in the incidence of 5-15s using a tablet to watch TV programmes or films (40% vs. 35%). This increase is evident among 5-7s (38% vs. 30%), who are now as likely as older children to watch on a tablet (39% for 8-11s and 41% for 12-15s). One in three 3-4s (33%) use a tablet for this purpose, up from 27% in 2016.

Watching TV content on a mobile phone increases with age among 5-15s, accounting for one in eight 5-7s (12%), one in five 8-11s (20%) and more than two in five 12-15s (43%). There has also been an increase in watching on a mobile phone among 5-15s (26% vs. 22%), driven by a ten percentage point increase for 12-15s (43% vs. 33%). Fifteen percent of 3-4s watch on a mobile phone, comparable to 2016.

Although there has been no change among all 5-15s, children aged 12-15 are more likely than in 2016 to say they use a desktop computer, laptop or netbook (33% vs. 27%) or a games console or player (23% vs. 16%), to watch television programmes or films. In both these instances, this follows a corresponding decrease between 2015 and 2016. Parents of children aged 3-4 are less likely than in 2016 to say their child watches this content on a games console or player (3% vs. 6%).

Figure 15: Devices ever used by children aged 5-15 to watch television programmes at home (2013) or elsewhere (2016 and 2017)

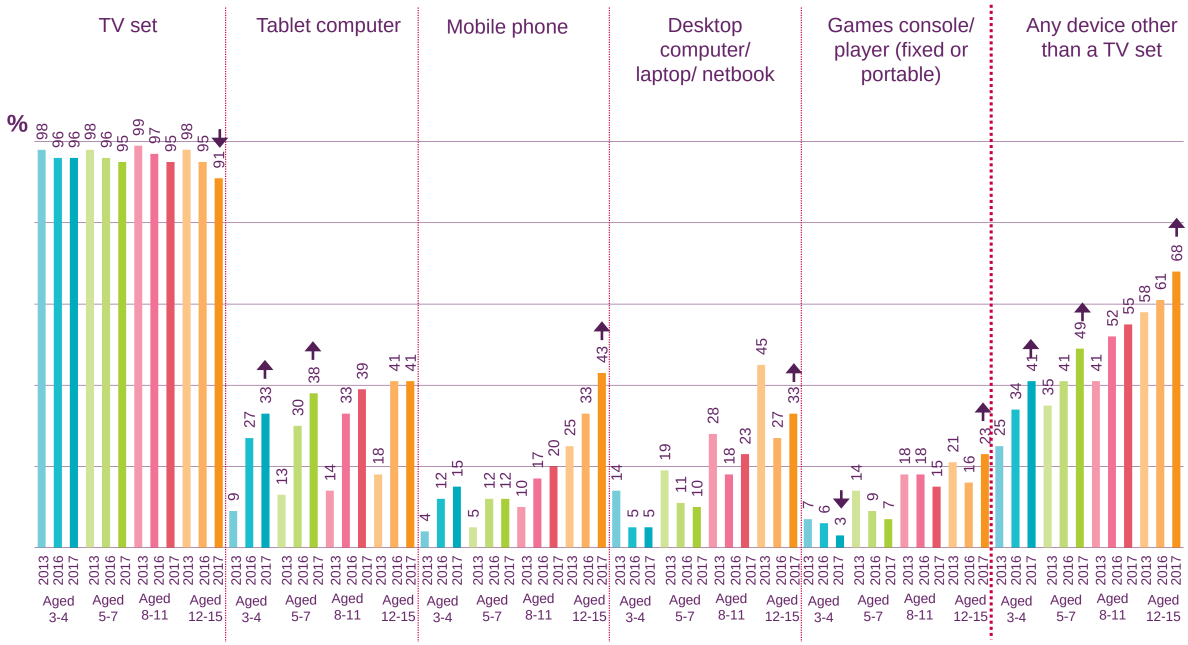


QP5/ QC1 – Does your child ever use any of these devices to watch television programmes or films at home or elsewhere? (prompted responses, multi-coded).

*Responses from parents for 5-7 year-olds and from children aged 8-15. *Since 2014 this measure includes those who say they use either a Smart TV or a 'standard 'TV set, prior to this we asked only about a TV set.*

Base: Parents of children aged 5-15 (1388) - significance testing shows any change between 2016 and 2017.

Figure 16: Devices ever used to watch television programmes at home (2013) or elsewhere (2016 and 2017), by age



QP5/ QC1 – Does your child ever use any of these devices to watch television programmes or films at home or elsewhere? (prompted responses, multi-coded). Responses from parents of 3-7 year-olds and from children aged 8-15. Base: Parents of children aged 3-4 (677) or 5-15 (412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

Six in ten 12-15s say they mostly use a TV set to watch TV programmes or films, less than in 2016

Figure 17 shows responses for 3-4s, 5-7s, 8-11s and all 5-15s as to which devices the child mostly uses to watch television programmes or films, at home or elsewhere.

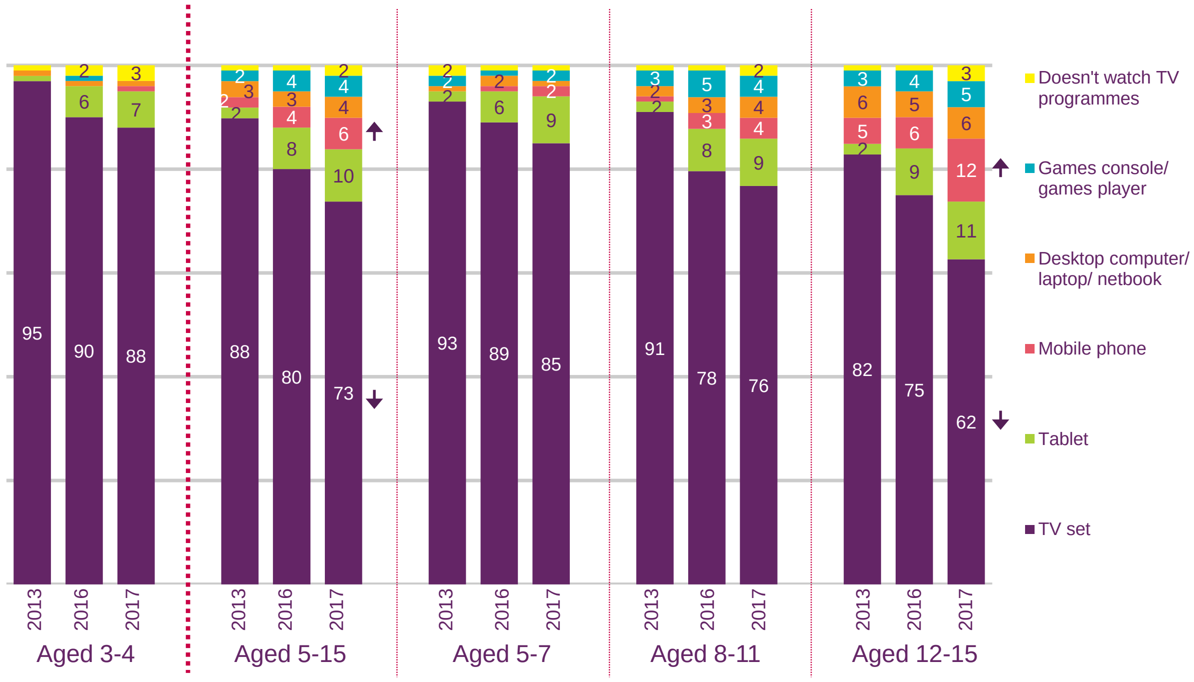
Close to nine in ten parents of 3-4s (88%) say their child mostly watches television programmes or films on a TV set; 7% say their child mostly watches on a tablet. Both these measures are unchanged since 2016. Each of the other devices shown are mostly used by less than 5% of 3-4s.

More than seven in ten children aged 5-15 say they mostly watch on a TV set; this incidence decreases with the age of the child, from 85% for 5-7s to 62% for 12-15s.

One in ten 5-15s (10%) say they mostly watch on a tablet, and this incidence does not vary by age. While 6% of 5-15s say they mostly watch on a mobile phone, this incidence increases with age (2% for 5-7s, 4% for 8-11s and 12% for 12-15s). This means that nearly a quarter of 12-15s (23%) now mostly watch TV content either on a tablet or on a mobile phone.

Compared to last year, 12-15s are less likely to say they mostly watch on a TV set (62% vs. 75%) and twice as likely to say they mostly watch on a mobile phone (12% vs. 6%).

Figure 17: Device 'mostly' used by children to watch television programmes or films at home (2013) or elsewhere (2016 and 2017), by age



QP6A/ QC2A – And which device do they mostly use to watch TV programmes or films? (prompted responses, single coded). Responses from parents for 3-7 year-olds and from children aged 8-15. Since 2014 responses are taken from the child aged 8-11 or aged 12-15 rather than the parent.

Base: Parents of children aged 3-4 (677) or 5-15 (412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

Insight from BARB: what children watch on the TV set

BARB data, published in Annex 1, show that most of the time spent viewing broadcast TV among children aged 4-15 in 2016 was at the time of broadcast (83%). This was a slight decline of two percentage points since 2015 and a seven percentage point fall since 2011. Viewing of recordings or catch-up services up to seven days after the original broadcast (time-shifted viewing) accounted for only 17% of total TV viewing time among all children aged 4-15.

Seventy-nine per cent of viewing among older children (aged 10-15) was in adult airtime, with 21% in children's airtime. For younger children (aged 4-9) adult airtime made up just over half (53%) of their viewing time, with 47% made up of children's airtime. For both younger and older children, many of the programmes with the largest children's audiences were early evening family entertainment shows like *Britain's Got Talent*, *Strictly Come Dancing* and *Bake Off*.

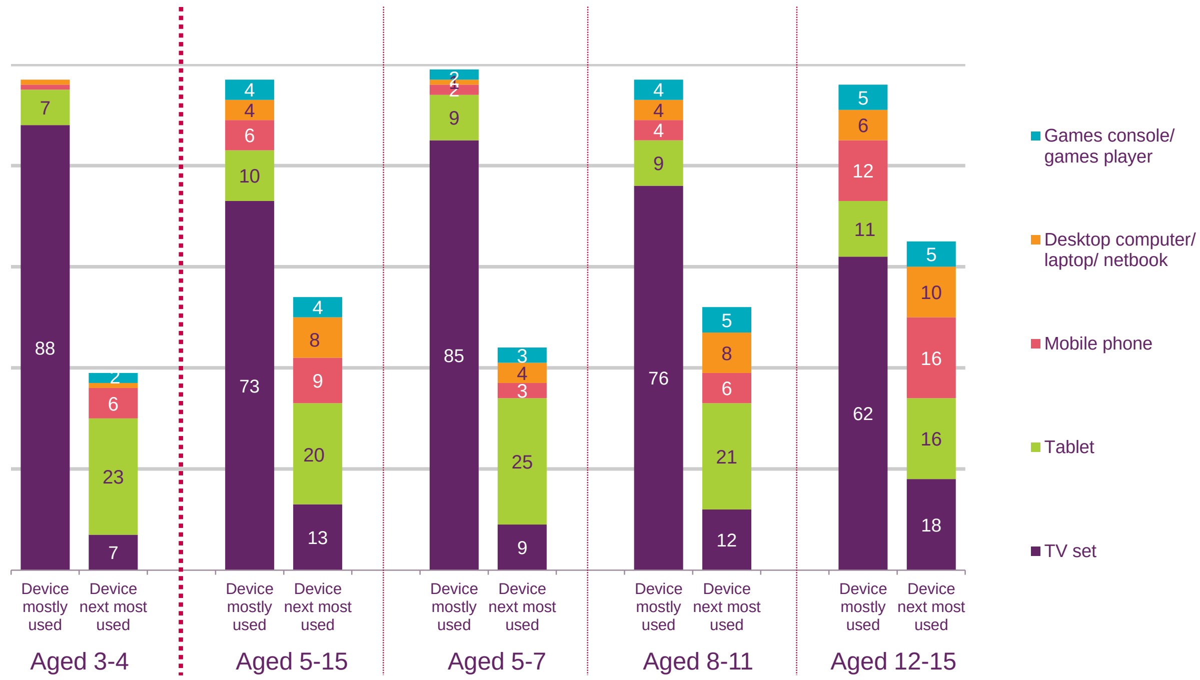
Tablets are the second most-used device for watching TV programmes or films, particularly among 3-4s and 5-11s

In 2017, in addition to asking about the device mostly used to watch TV programmes or films, parents of 3-7s and children aged 8-15 were asked about the second-most-used device in the household for watching this content.

Figure 18 shows the results based on all children. While one on ten 5-15s (10%) say the tablet is their most-used device for watching TV content, this doubles to two in ten (20%) nominating it as the next-most-used device.

Children aged 3-4 (23%), 5-7 (25%) and 8-11 (21%) are most likely to nominate a tablet as their next-most-used device for watching TV content. For 12-15s, a mobile phone (16%) is as likely as a tablet (16%) to be nominated as their next-most-used device.

Figure 18: Device preference for watching television programmes or films, by age: 2017



QP6B– And which is their second most used device to watch TV programmes or films? (prompted responses, single coded). Responses from parents for 3-7 year-olds and from children aged 8-15.

Base: Parents of children aged 3-4 (677) or 5-15 (412 aged 5-7, 497 aged 8-11, 479 aged 12-15)

Close to half of 5-15s watch TV content at least weekly on devices other than a TV set

In 2017, parents whose child watches television programmes or films on a TV set, and those whose child watches on devices other than a TV set, were asked to say how often their child watched this content on these devices.

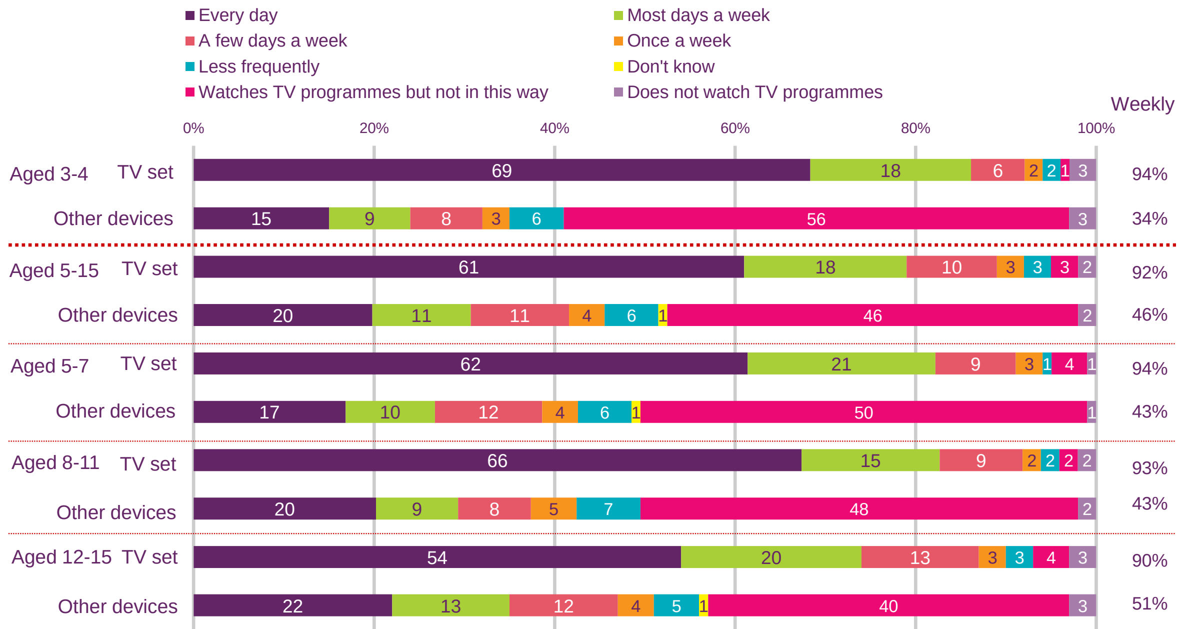
The results are shown in Figure 19, based on all children. Across each age group of child, daily viewing and weekly viewing are both higher on a TV set than on any other device the child might use for watching TV content.

Children aged 5-15 are three times as likely to watch TV content every day on a TV set (61%) as on any other device (20%). They are also twice as likely to watch TV content on a TV set at least weekly (92%) than they are to watch on other devices (46%).

Children aged 3-4 (69%) are more likely than 5-7s (62%) to watch TV programmes or films on a TV set every day, and those aged 12-15 (54%) are less likely than younger children to do so. There is less variation by age in watching TV content on a TV set at least weekly.

Compared to watching on a TV set, there is less variation by age in watching TV programmes or films every day on devices other than a TV set, ranging from 15% of parents of 3-4s who say their children do this, to 22% of parents of 12-15s. Half of 12-15s (51%) watch content on devices other than a TV set at least weekly; this is more likely than among 3-4s (34%), 5-7s (43%) or 8-11s (43%).

Figure 19: Frequency of watching TV programmes or films on a TV set and on other devices: 2017



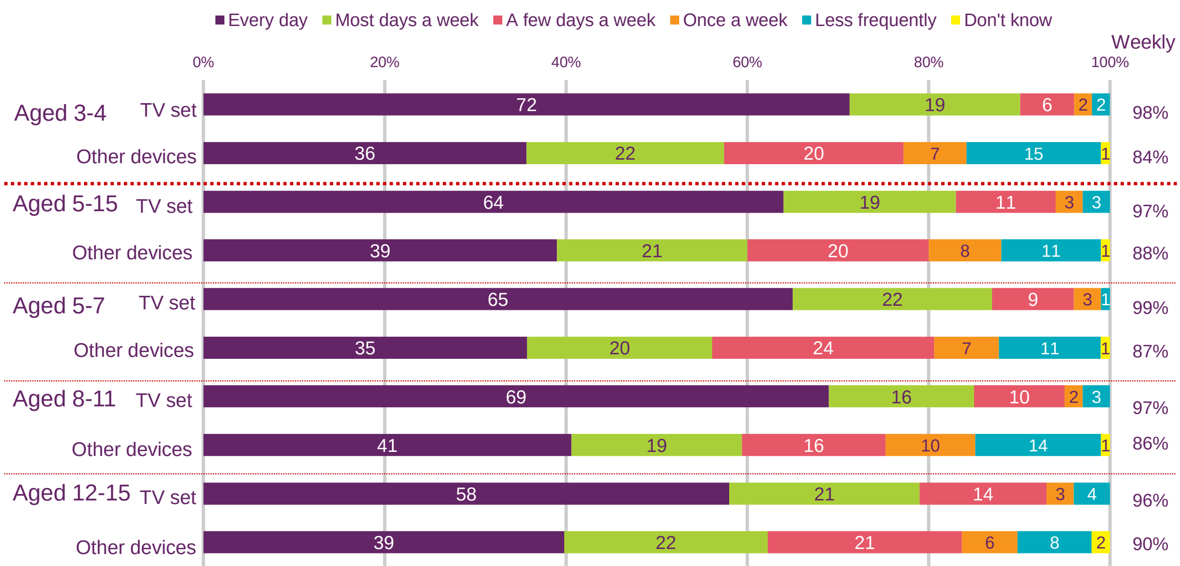
QP9 – How frequently does your child watch television programmes or films on a TV set at home or elsewhere? / QP10 – You said your child watches television programmes or films at home or elsewhere on devices other than a TV set. How frequently does your child watch television programmes or films at home or elsewhere on this device/ these devices? This could be watching television programmes or films as they are broadcast, anything recorded from the TV to view later or any use of catch-up services or other on-demand content (prompted responses, single coded).

Base: Parents of children aged 3-4 (677) or 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15).

Figure 20 shows the same results as Figure 19, but the data are based on children who watch content on a TV set and on devices other than a TV set, rather than on all children.

Given how many children watch TV programmes or films on a TV set, there is little difference in the *frequency* of watching, when this is based on users. Among those who watch content on devices other than a TV set, more than one in three 3-4s (36%) and two in five 5-15s (39%) watch every day, while more than four in five 3-4s (84%) and close to nine in ten 5-15s (88%) watch at least weekly. There is no variation in either daily or weekly viewing by the age of the child.

Figure 20: Frequency of watching TV programmes or films on a TV set and on other devices, among children who view in these ways: 2017



QP9 – How frequently does your child watch television programmes or films on a TV set at home or elsewhere? / QP10 - You said your child watches television programmes or films at home or elsewhere on devices other than a TV set. (prompted responses, single coded) / QP10 - How frequently does your child watch television programmes or films at home or elsewhere on this device/ these devices? This could be watching television programmes or films as they are broadcast, anything recorded from the TV to view later or any use of catch-up services or other on-demand content (prompted responses, single coded).

Base: Parents of children aged 3-4 who watch on a TV set (651) or 5-15 (1318 aged 5-15, 393 aged 5-7, 476 aged 8-11, 449 aged 12-15).

Base: Parents of children aged 3-4 who watch on devices other than a TV set (273 aged 3-4, 780 aged 5-15, 197 aged 5-7, 242 aged 8-11, 269 aged 12.15).

Internet use, by device

More than half of 3-4s and four in five 5-7s go online, up by 12 percentage points since 2016

This section looks at which devices children ever use to go online, and which ones they mostly use.

Figure 21 shows which devices the child ever uses to go online, at home or elsewhere, for 5-15s[33]. Figure 22 shows this for children aged 3-4, 5-7, 8-11 and 12-15. Changes were made to this question in 2014 to include use outside as well as in the home, so any comparisons with data collected before 2014 should be seen as indicative only[34].

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[33] With responses provided by parents of 5-7s and from children aged 8-11 and 12-15

[34] Since 2014 responses have been taken from the child aged 8-11 or 12-15 rather than the parent, whereas before then responses were taken from the parent for children aged 8-11 and from the child aged 12-15.

As mentioned briefly in Section 5, more than nine in ten (92%) children aged 5-15 go online using any type of device, up since 2016 (from 87%). As shown in Figure 22, going online using any type of device increases with age, ranging from 53% of 3-4s to 99% of 12-15s.

The overall increase in going online among 5-15s since 2016 is evident for 5-7s and 8-11s. Four in five of all 5-7s (79%) go online in 2017, a 12 percentage point increase on 2016 (from 67%). More than nine in ten 8-11s now go online (94%) up from nine in ten in 2016 (90%). And a majority of children aged 3-4 are now online (53%); a 12 percentage point increase since 2016 (41%).

A majority of 5-15s use a tablet (63%) or a laptop/ netbook (62%) or to go online, while half use a mobile phone (50%). One in five children aged 5-15 use a games console or player (20%) or a desktop computer (19%) to go online, while one in ten (9%) use a smart TV.

Compared to last year, among all 5-15s, tablet computers (63% vs. 54%), laptops/ netbooks[35] (62% vs. 58%) mobile phones (50% vs. 44%) and smart TVs (9% vs. 6%) are all more likely to be used to go online.

No device is used to go online by a majority of 3-4s, although there has been considerable growth since last year in use of a tablet computer to go online (43% vs. 30%). No other device is more likely than in 2016 to be used to go online, so the increase in going online among 3-4s is attributable to their increased use of tablets for this purpose. In 2017, as in 2016, 3-4s are equally likely to use a laptop or netbook (17%) as a mobile phone (18%) to go online.

A tablet is the only device used to go online by more than half of 5-7s (58%); this is more likely than in 2016 (45%). The next-most-used device to go online for this age group is the laptop/netbook, used by 38%, unchanged since last year. One in four 5-7s use a mobile phone to go online (26%); this is also more likely than in 2016 (20%). The growth in going online among 5-7s is therefore driven by increased use of tablets and mobile phones for this purpose.

In 2017, two in three children aged 8-11 say they use a tablet (67%) or a laptop/ netbook (also 67%) to go online; use of both these devices has increased since 2016 (up from 57% and 55% respectively)[36]. No other device is used by most 8-11s to go online. Four in ten 8-11s use a mobile phone (41%), unchanged since last year. One in five 8-11s use a games console or games player (21%) or a desktop computer (19%) to go online, as they did in 2016.

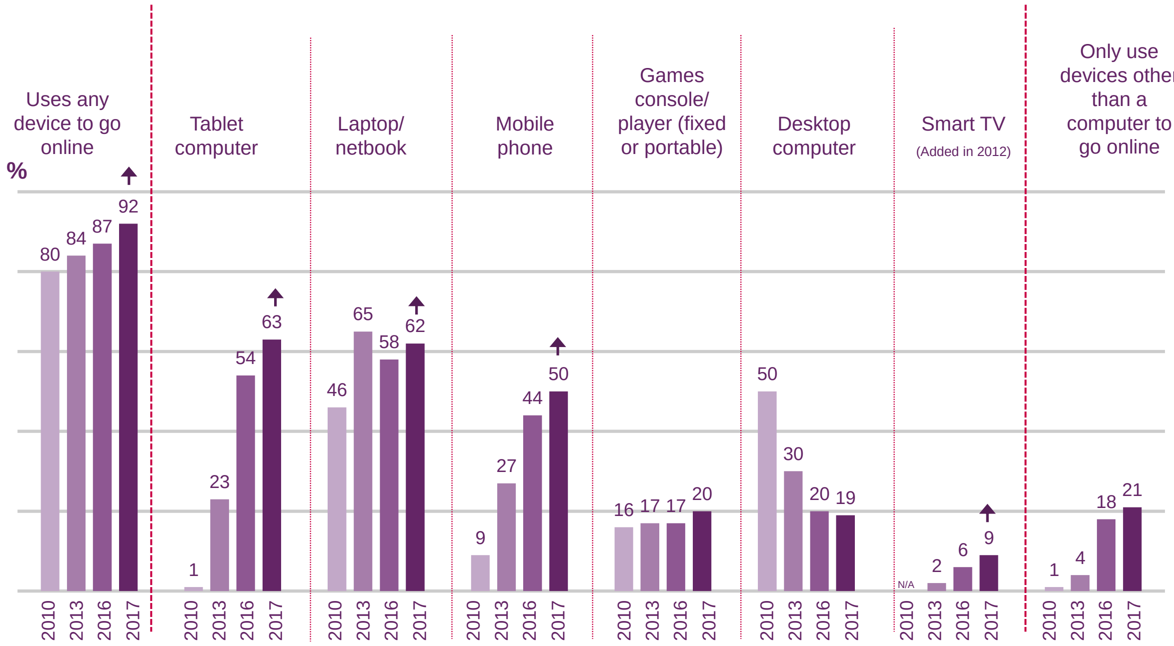
At least three in four 12-15s use a mobile phone (78%) or a laptop/netbook to go online (75%) while three in ten use a games console or player (30%) and one in four a desktop computer (25%). Although there has been no change in the overall incidence of going online for 12-15s (99%), they are now more likely to go online using a mobile phone (78% vs. 71% in 2016) or a smart TV (14% vs. 9%).

One in five 5-15s (21%) use *only* an alternative device, and not a desktop, laptop or netbook, to go online at home, unchanged since 2016. However, the youngest children are more likely only to use alternative devices to go online. One in three 3-4s (34%) and 5-7s (33%) go online in this way, up

[35] This increase follows a corresponding decrease between 2015 and 2016 (from 62% to 58%).
[36] The increase in use of a laptop/netbook to go online since 2016 follows a corresponding decrease between 2015 and 2016 (from 66%).

from one in five in 2016 (21% for both 3-4s and 5-7s). As such, 8-11s (18%) and 12-15s (14%) are less likely than 3-4s or 5-7s to use only an alternative device to go online.

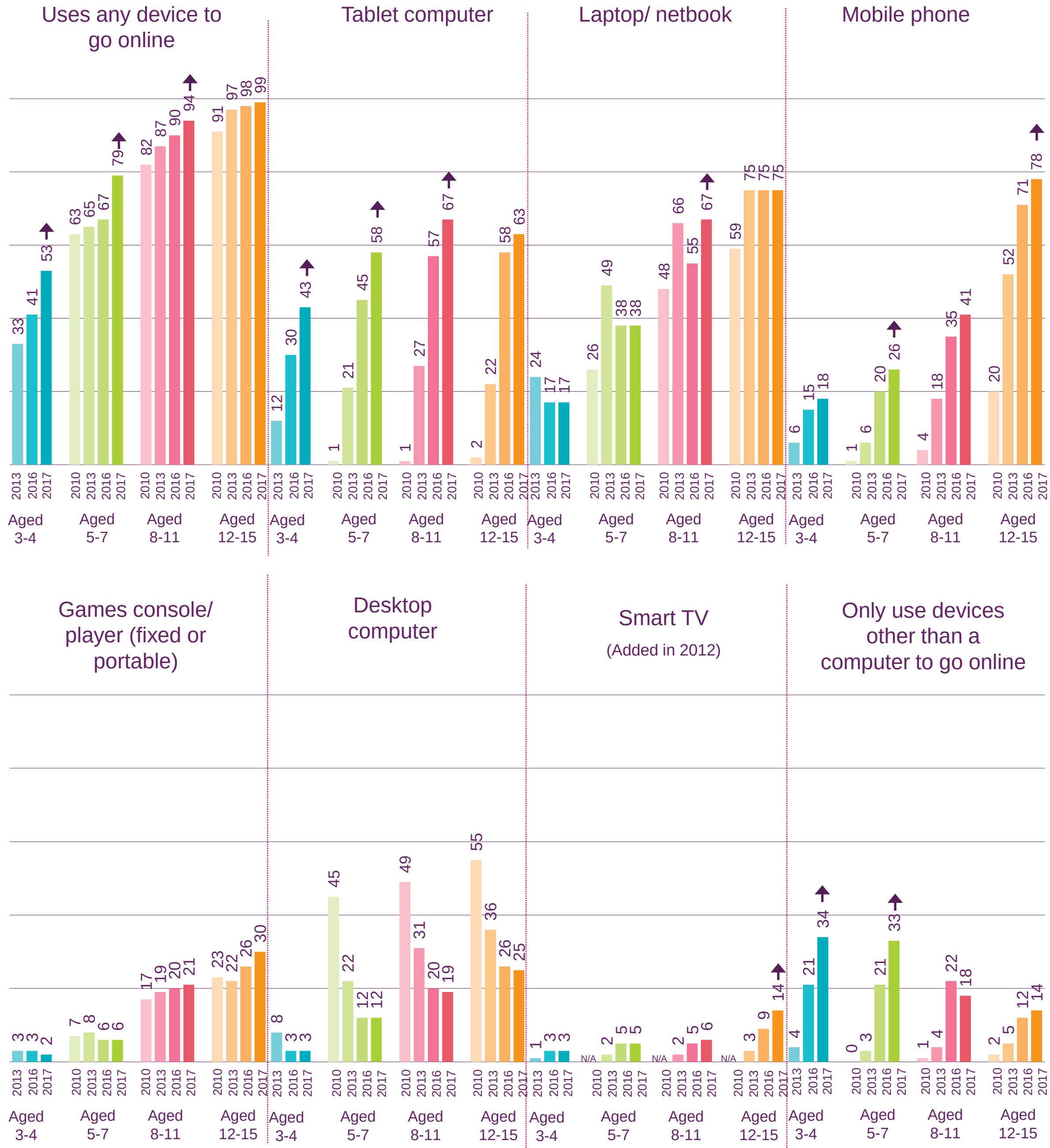
Figure 21: Devices ever used by children aged 5-15 to go online at home (2010, 2013) or elsewhere (2016, 2017)



QP23/ QC10 – Including any ways you may have already mentioned, does your child ever use any of the following devices to go online at home or elsewhere? (prompted responses, multi coded) Responses from parents for 5-7 year-olds and from children aged 8-15. In 2013 parents/ children were asked about going online at home whereas since 2014 they were asked about going online at home or elsewhere.

Base: Parents of children aged 5-15 (1388) - significance testing shows any change between 2016 and 2017.

Figure 22: Devices ever used by children to go online at home (2010, 2013) or elsewhere (2016, 2017), by age



QP23/ QC10 – Including any ways you may have already mentioned, does your child ever use any of the following devices to go online at home or elsewhere? (prompted responses, single coded). Responses from parents for 3-7 year-olds and from children aged 8-15. In 2013 parents/ children were asked about going online at home whereas since 2014 they were asked about going online at home or elsewhere

Base: Parents of children aged 3-4 (677) or 5-15 (412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

Device 'mostly' used to go online, at home or elsewhere

Compared to last year, 3-4s and 5-7s are more likely to mostly use a tablet to go online

Figure 23 shows responses from parents of 3-4s and 5-7s, and from children aged 8-11 and 12-15, as to which devices the child mostly uses to go online at home or elsewhere[37].

Children aged 5-15 who go online are most likely to say they 'mostly' use a tablet (42%) to go online, followed by a mobile phone (31%) or a laptop/ netbook (14%). Compared to 2016, 5-15s are now less likely to mostly use a laptop/ netbook to go online (14% vs. 17%).

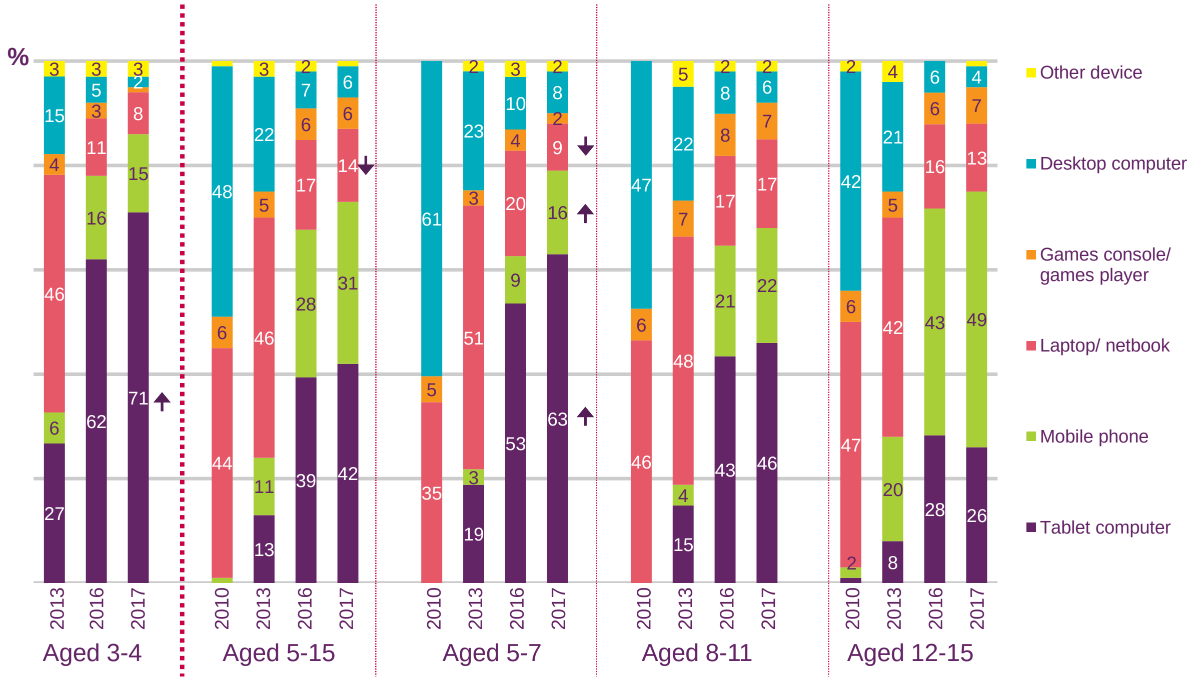
In 2017, 3-4s (71%), 5-7s (63%) and 8-11s (46%) are all most likely to use a tablet to go online. Compared to 2016, 3-4s (71% vs. 62%) and 5-7s (63% vs. 53%) are more likely to say they would mostly use a tablet. Children aged 5-7 are also less likely to mostly use a laptop/ netbook to go online, compared to last year (9% vs. 20%), and more likely to mostly use a mobile phone (16% vs. 9%).

The devices mostly used by 8-11s and 12-15s to go online are unchanged since 2016. Close to half of 8-11s (46%) say they mostly use a tablet computer, while one in five (22%) mostly use a mobile phone. Less than one in five (17%) mostly use a laptop or netbook.

Half of 12-15s nominate a mobile phone (49%) as the device mostly used to go online, while one in four (26%) mostly use a tablet and half this amount again (13%) nominate a laptop or netbook.

[37] Since 2014 responses have been taken from the child aged 8-11 or 12-15 rather than the parent, whereas previously these responses had been taken from the parent for children aged 8-11 and from the child aged 12-15. Since 2014 parents and children have been asked about devices used to go online at home or elsewhere, whereas previously the question asked about devices used to go online at home.

Figure 23: Device 'mostly' used by children to go online at home (2010, 2013) or elsewhere (2016, 2017), by age



QP24/ QC11 – And when your child goes online at home or elsewhere, which device do they mostly use? (prompted responses, single coded). Responses from parents for 3-7 year-olds and from children aged 8-15. Since 2014 responses are taken from the child aged 8-11 or aged 12-15 rather than the parent.

Base: Parents whose child ever goes online aged 3-4 (354) or 5-15 (1255 aged 5-15, 317 aged 5-7, 463 aged 8-11, 475 aged 12-15). Significance testing shows any change between 2016 and 2017.

Device 'mostly' used for YouTube

Tablets are the device mostly used by 3-4s and 5-11s to watch YouTube content, although 12-15s mostly watch on a mobile phone

Parents of children aged 3-4 and 5-7, and children aged 8-11 and 12-15 who use YouTube[38], were prompted with five possible devices and were asked to say which they mostly used for watching YouTube.

Among 3-4s who use YouTube, a majority of parents say their child uses a tablet (63%) for this, with only a third as many mentioning a mobile phone (21%). Less than one in ten mostly use a TV set (8%) or a computer, laptop or netbook (5%), or a games console (2%). Each of these measures is unchanged since last year.

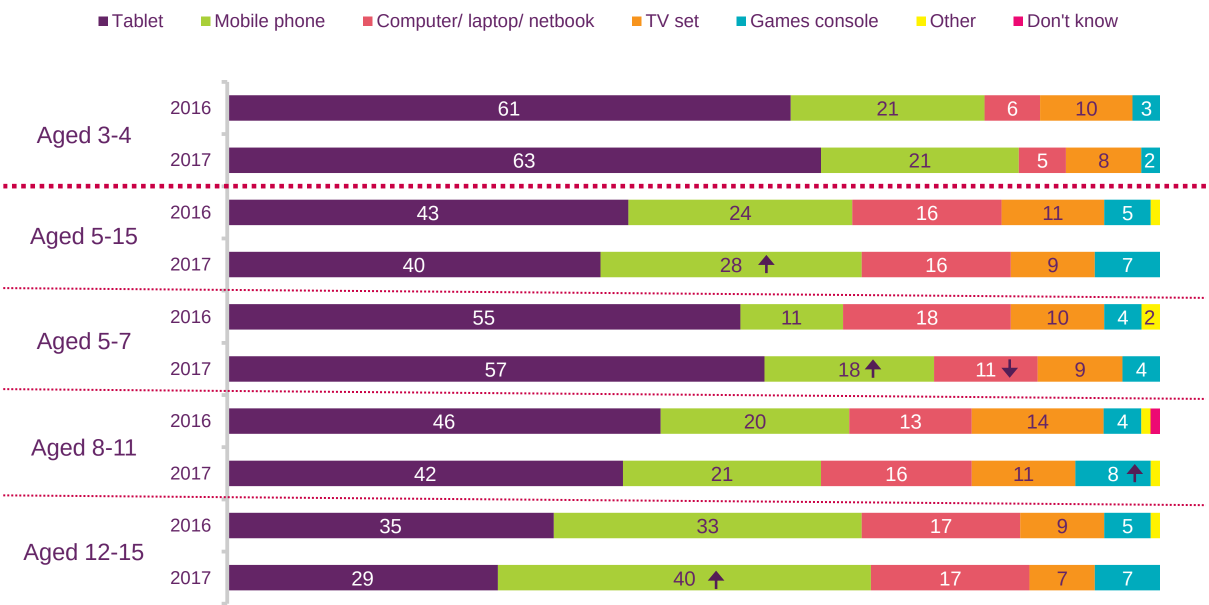
No single device is mostly used for accessing YouTube content by a majority of children aged 5-15, although a tablet is the device mostly used by two in five (40%) children of this age. Use of a tablet is more likely among 5-7s (57%) and 8-11s (42%) than among 12-15s (29%). In contrast, use of a mobile to watch YouTube content is higher for 12-15s (40%) than for 5-7s (18%) or 8-11s (21%).

Compared to 2016, 5-7s and 12-15s are more likely to say they mostly watch YouTube on a mobile phone (18% vs. 11% for 5-7s and 40% vs. 33% for 12-15s). While there is still a clear preference for tablet use among 5-7s and 8-11s, 12-15s are now more likely to mostly use a mobile phone rather than a tablet to watch YouTube.

Around one in six (16%) YouTube users aged 5-15 mostly watch content on a computer, laptop or netbook, 9% mostly watch on a TV set and 7% watch through a games console, with little variation by age in use of these devices for watching YouTube content.

[38] As discussed in more detail in the next Section (Section 6 - Figure 34)

Figure 24: Device mostly used for accessing the YouTube website or app, by age: 2016, 2017



QP22E/ QC8. Here is a list of devices that your child may use to access the YouTube website or app. Which device does your child mostly use to watch YouTube? (prompted responses, single coded). Responses from parents for 3-7 year-olds and from children aged 8-15.

Base: Parents of children who use the YouTube website aged 3-4 (325) or 5-15 (1100 aged 5-15, 285 aged 5-7, 388 aged 8-11, 427 aged 12-15). Significance testing shows any change between 2016 and 2017.

Devices used to play games

In 2017, 5-15s are less likely to play games on games consoles

Figure 25 shows which devices children aged 5-15 ever use to play games at home or elsewhere[39]. Figure 26 looks in more detail at the devices used to play games at home or elsewhere by children aged 3-4, 5-7, 8-11 and 12-15.

In 2017, three in four children aged 5-15 (75%) play games at home or elsewhere on any type of device, unchanged since last year. Children aged 8-11 (81%) and 12-15 (77%) are more likely than 3-4s (40%) and 5-7s (66%) to play games on any type of device. Compared to 2016, the incidence of gaming among 3-4s, 5-7s, 8-11s and 12-15s, as for 5-15s overall, is unchanged.

Playing games on a games console (connected to a TV) is still the most popular type of gaming among 5-15s (46%), although this is less likely than in 2016 (50%). While a majority of 8-11s (51%) and 12-15s (55%) play console-based games this is true of a minority of 3-4s (7%) and 5-7s (26%); both these measures are lower than last year (down from 14% for 3-4s and from 38% for 5-7s).

More than one in three (35%) children aged 5-15 play games on a tablet. Children aged 5-7 (37%) and 8-11 (39%) are more likely than 3-4s (27%) or 12-15s (29%) to play games on a tablet. Each of these measures is unchanged since last year.

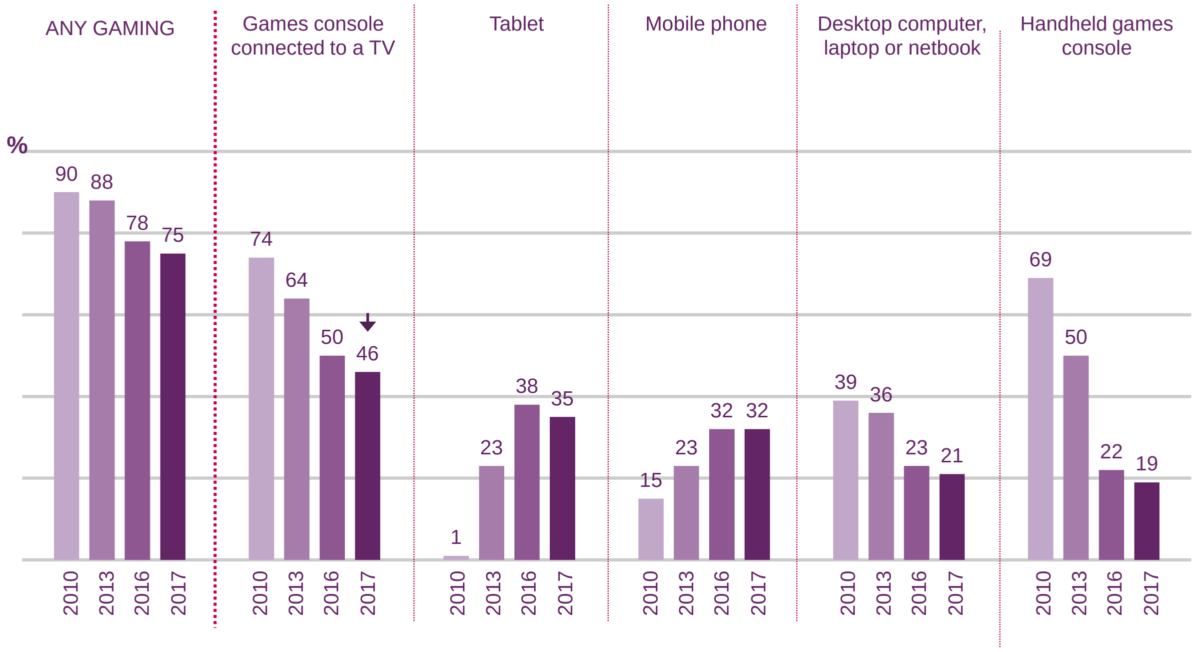
One in three 5-15s (32%) play games on a mobile phone, also unchanged since 2016. Gaming on a mobile increases with the age of the child, accounting for one in seven 3-4s (14%), one in five 5-7s (20%) three in ten 8-11s (30%) and more than four in ten 12-15s (42%). Each of these incidences are unchanged compared to last year.

One in five (21%) 5-15s play games on a computer, laptop or netbook, unchanged since 2016. There has also been no change in levels of gaming on these devices for 3-4s, 5-7s and 8-11s. One in five 12-15s (21%) play games in this way, less than in 2016 (28%).

One in five (19%) children aged 5-15 play games on a handheld games console (19%) with no variation in this incidence by age. Less than one in ten 3-4s plays games on a handheld player (7%). Compared to last year, there has been no change in the proportion of children who play games in this way, for any age group of child.

[39] Since 2014 responses have been taken from the parents of children aged 5-7 and from the child aged 8-11 or 12-15, whereas previously responses had been taken from the parent for children aged 8-11 and from the child aged 12-15. Since 2014 parents and children have been asked about devices used to play games at home or elsewhere, whereas previously the question had been asked about devices used to play games at home.

Figure 25: Devices used for gaming by children aged 5-15 at home (2010, 2013) or elsewhere (2016, 2017)



QP65/ QC40 – Does your child ever play games at home or elsewhere in any of these ways? (prompted responses, multi-coded) Responses from parents for 5-7 year-olds and from children aged 8-15, only showing responses by more than 3% of all 5-15s. In 2010-2013 parents and children were asked about gaming at home whereas in 2014 they were asked about gaming at home or elsewhere. Since 2014 responses have been taken from children aged 8-11 and 12-15 rather than their parents.

Base: Parents of children aged 5-15 (1388). Significance testing shows any change between 2016 and 2017.

Figure 26: Devices used for gaming at home (2010, 2013) or elsewhere (2016, 2017), by age

QP65/ QC40– Does your child ever play games at home or elsewhere in any of these ways? (prompted responses, multi-coded). Responses from parents for 3-7 year-olds and from children aged 8-15, only showing responses by more than 3% of all 5-15s. In 2011-2013 parents and children were asked about gaming at home whereas since 2014 they were asked about gaming at home or elsewhere. Since 2014 responses have been taken from children aged 8-11 and 12-15 rather than their parents.

Base: Parents of children aged 3-4 (677) or 5-15 (412 aged 5-7, 497 aged 8-11, 479 aged 12-15). Significance testing shows any change between 2016 and 2017.

Affinity with media devices

For the first time, in 2017, a mobile phone is the most-missed media device among 5-15s; this increases by age to almost three in five 12-15s

Children aged 5-15 were asked to choose, from a list of nine media devices, which one they would miss the most if it were taken away. The list of options for this question was revised in 2014 to focus on devices, rather than the previous mix of devices and media activities. Figure 27 shows the device that children aged 5-15 and those in each age group say they would miss the most, in 2016 and 2017.

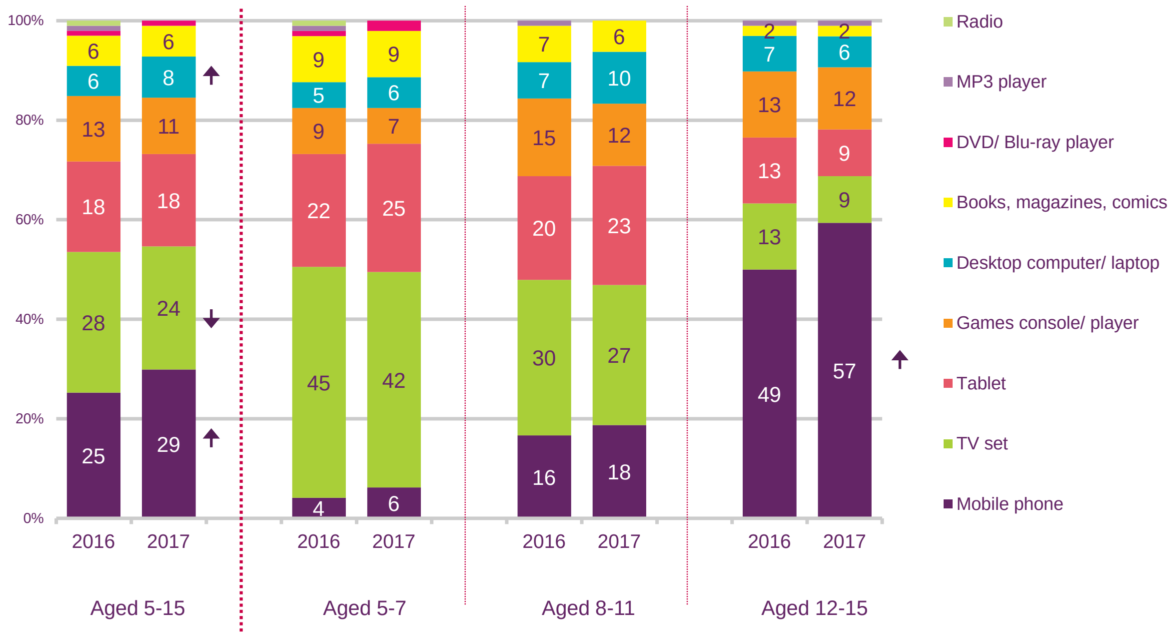
Across all 5-15s, around three in ten (29%) say they would miss a mobile phone the most, making this the device most likely to be chosen. This is more likely than in 2016 (29% vs. 25%) and it is the first time that more children aged 5-15 have nominated a mobile phone than a TV set as their most-missed device. Around a quarter of children aged 5-15 say they would most miss the TV set (24%, down from 28% in 2016).

Around one in five (18%) 5-15s say they would miss a tablet the most, while one in ten (11%) nominate a games console or games player. Both these preferences are unchanged since last year. While less than one in ten 5-15s (8%) nominate a desktop computer or laptop as their most-missed device, this is more than in 2016 (6%).

As shown in Figure 27, there are significant differences by age in terms of the media device the child would miss the most. For younger children (5-7s and 8-11s) the TV set is the most-missed device (42% for 5-7s, 27% for 8-11s), followed by the tablet (25% for 5-7s and 23% for 8-11s). Each of the remaining devices is nominated by one in ten 5-7s, or less. Among 8-11s, the next most-missed device is a mobile phone (18%) while 12% nominate a games console/ player or a desktop computer/ laptop. There has been no change in the devices that children aged 5-7 and 8-11 say they would miss the most, compared to 2016.

Most 12-15s (57%) say they would miss a mobile phone the most; this is up since 2016 (49%). The next most-missed device is a games console/ player (12%), while one in ten would miss a TV set (9%) or a tablet (9%).

Figure 27: Device children would miss the most, by age: 2016 and 2017

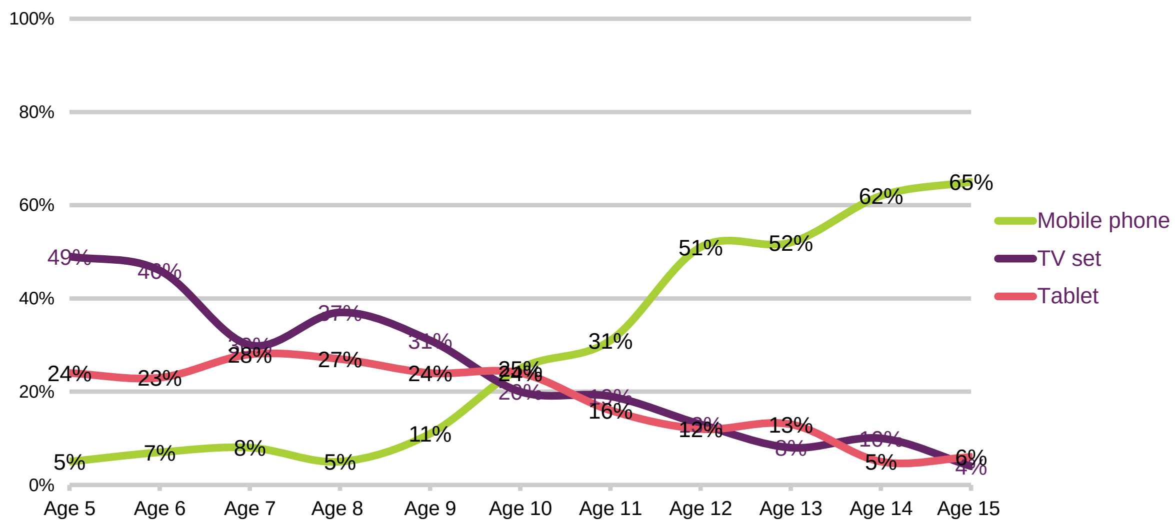


QC51– Which one of the things you use almost every day would you miss the most if it got taken away? (prompted responses, single coded)

Base: Children aged 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15). Significance testing shows any change between 2016 and 2017.

It is also possible to show how preferences, in terms of most-missed devices, vary by the age of the child for television sets, mobile phones and tablets. Figure 28 shows that up to the age of 10, children are more likely to nominate a TV set or a tablet than a mobile phone. This preference switches at the age of 11, with a clear preference for nominating a mobile phone rather than a TV set or tablet as the most-missed device.

Figure 28: Device children would miss the most, by individual age: 2017



QC51– Which one of the things you use almost every day would you miss the most if it got taken away? (prompted responses, single coded)

Base: Children aged 5-15 (169 aged 5, 129 aged 6, 114 aged 7, 175 aged 8, 123 aged 9, 102 aged 10, 97 aged 11, 162 aged 12, 101 aged 13, 108 aged 14, 108 aged 15).

Differences by gender and socio-economic group

Boys aged 5-7, 8-11 and 12-15 are more likely than girls to game (particularly on a games console) and to watch television and go online using their games console

The most obvious difference between boys and girls is in playing games. Boys aged 5-7, 8-11 and 12-15 are more likely than girls to play games, and to do so on a games console connected to a TV or a hand-held games player. Older boys aged 8-11 (20% vs. 10%) and 12-15 (32% vs. 14%) are more likely than girls to watch TV programmes or films using a games console or games player, and boys aged 12-15 are more likely to mostly watch TV in this way (9% vs. 1%).

Games consoles are more likely to be used to go online by boys aged 8-11 (31% vs. 11%) and 12-15 (46% vs. 14%) and to be the most-used device to go online among boys aged 8-11 (12% vs. 2%) and 12-15 (12% vs. 1%). Older boys who are YouTube users are more likely than girls to mostly access YouTube on a games console (8-11s: 13% vs. 4%, and 12-15s: 12% vs. 2%).

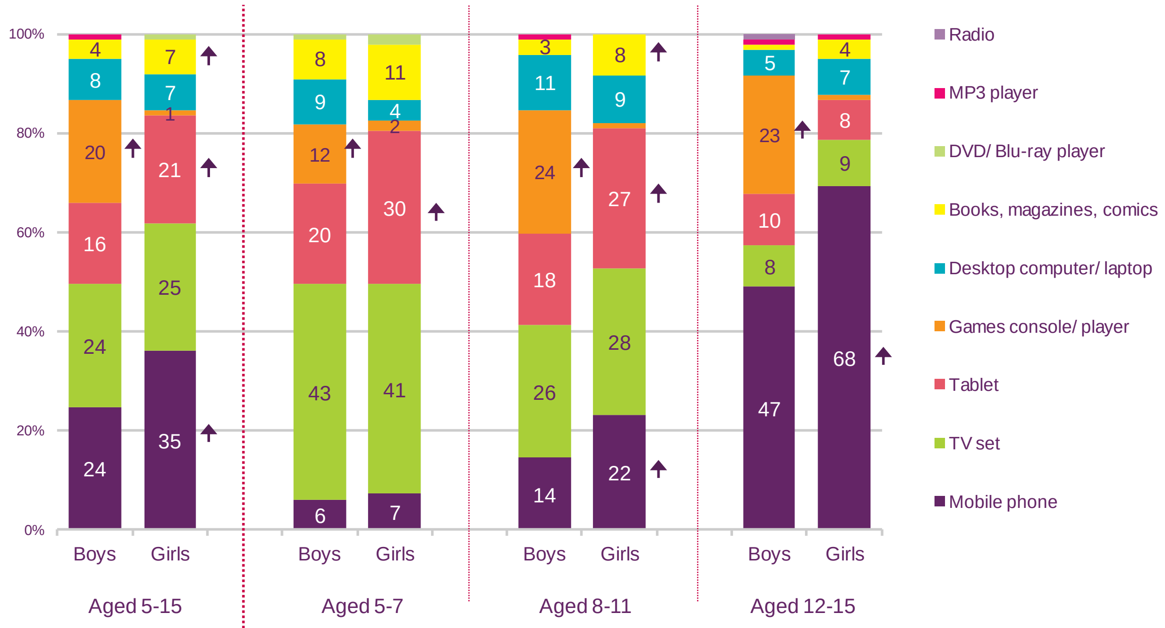
Where girls differ from boys in the devices they use, this is mainly due to their greater use of mobile phones. Girls aged 12-15 are more likely than boys to watch television programmes or films using a mobile phone (48% vs. 39%) and girls in this age group are also more likely to 'mostly' use a mobile to go online (57% vs. 41%). Younger girls, aged 5-7, who are YouTube users, are more likely than boys to 'mostly' access YouTube on a mobile phone (24% vs. 13%).

Girls aged 8-11 are more likely than boys to go online using a tablet (72% vs. 62%) and to mostly use a tablet to go online (52% vs. 41%).

As shown in Figure 29, when comparing the device children would miss the most by gender, boys in each age group are more likely than girls to say they would most miss a games console/ player. Girls aged 5-7 (30% vs. 20%) and 8-11 (27% vs. 18%) are more likely than boys to miss a tablet; girls aged 8-11 also more likely to miss books, magazines or comics (8% vs. 3%).

Girls aged 12-15 are more likely to miss a mobile phone (68% vs. 47%) as are girls aged 8-11 (22% vs. 14%).

Figure 29: Device children would miss the most, by gender within age: 2017



QC51 – Which one of the things you use almost every day would you miss the most if it got taken away? (prompted responses, single coded)

Base: Children aged 5-15 (696 boys aged 5-15, 692 girls aged 5-15, 201 boys aged 5-7, 211 girls aged 5-7, 255 boys aged 8-11, 242 girls aged 8-11, 240 boys aged 12-15, 239 girls aged 12-15) - Significance testing shows any difference between boys and girls in each age group

Children aged 5-15 in DE households are less likely to use a TV set to watch television programmes or films

Children aged 5-15 in DE households are as likely as 5-15s overall to watch television programmes or films at home or elsewhere, but they are less likely to do so using a TV set (89% vs. 94%) and less likely to 'mostly' watch using a TV set (67% vs. 73%). Children aged 5-15 in AB households are more likely than average to watch using a desktop computer/ laptop or netbook (31% vs. 23%).

Children aged 3-4 in C2DE households[40] are more likely than those in ABC1 households to watch TV programmes or films every day on devices other than a TV set (18% vs. 12%).

[40] It is not possible to analyse the data by all four socio-economic groups for children aged 3-4 due to base sizes of lower than 100 interviews for some of these groups. For children aged 3-4, any socio-economic group analysis therefore compares those in ABC1 households to those in C2DE households.

As with other YouTube users, a tablet is the device most likely to be used by children aged 5-15 in DE households to access the YouTube website or app. However, those in DE households are more likely than average to say they mostly use a games console for YouTube (11% vs. 7%), while those in AB households are less likely (2% vs. 7%).

Children aged 5-15 in DE households are less likely to use a tablet, laptop or netbook to go online

While there are no differences by socio-economic group in the overall incidence of going online, compared to the average, there are differences in the devices used to do so. Children aged 5-15 in AB households are more likely than average to use a laptop/ netbook (73%) or a tablet (70%) to go online, while those in DE households are less likely to use these devices (55% and 54%). As such, children in AB households are less likely to *only* use devices other than a desktop/ laptop to go online (12% vs. 21%).

Children aged 3-4 in ABC1 households are more likely than those in C2DE households to go online using a tablet (49% vs. 37%) and to 'mostly' go online on this device (42% vs. 33%). Children aged 3-4 in ABC1 households are also more likely to go online using a laptop/ netbook (22% vs. 13%).

Children aged 5-15 in DE households are less likely to use a tablet, mobile phone or desktop computer for gaming

There are also no differences by socio-economic group in the proportion of children who play games on any devices in 2017, compared to the average for 5-15s, but differences are evident in the devices used for gaming. Children aged 5-15 in DE households are less likely to play using a tablet (29% vs. 35%) or a mobile phone (26% vs. 32%) or a desktop computer/ laptop/ netbook (15% vs. 21%). Children in AB households are more likely to play using a tablet (42% vs. 35%).

Children aged 3-4 in ABC1 households are more likely than those in C2DE households to play games on a tablet (31% vs. 23%) on a mobile phone (18% vs. 11%) or on a desktop computer, laptop or netbook (5% vs. 1%).

7. Content consumption and YouTube

This section reports on some of the findings of an additional survey this year, conducted online with 12-15 year-olds. It reports on the content providers that can be used to watch TV programmes, films, videos or clips; levels of awareness and use for each of these content providers; the extent to which the providers are considered to have differing target audiences; and which provider would be missed the most.

Use of YouTube among all children is also covered in detail in this section, drawing on both the face-to-face and online surveys, including preferences for watching content on YouTube compared to television content through a TV set, the type of content children access on YouTube, and their favourite content.

Key findings

- YouTube is the most-recognised content provider of the 14 examples shown to 12-15s interviewed online (94%), followed by ITV (89%), Netflix (87%) and BBC One/BBC Two (82%).
- YouTube is the content provider the highest proportion of 12-15s say they 'ever' watch (85%), with ITV (65%) the next most nominated to 'ever' watch.
- YouTube is the only content provider, of the 14 examples, which is used by a majority of 12-15s to 'often' watch content (67%), with Netflix (38%) the next most nominated to 'often' watch.
- More than half of 12-15s ever watch ITV (65%) or BBC One/BBC Two (57%), but less than a third say they 'often' watch either of these.
- Most 12-15s (75%) know of Amazon Prime, and 24% say they ever watch it.
- Children aged 12-15 can differentiate between the target audiences of the different content providers. No provider is seen by a majority of 12-15s as being aimed at 'people my age'. YouTube, Netflix, Amazon Prime and ITV are mostly seen by 12-15s as being aimed at 'everyone'. Nine in ten (88%) 12-15s who are aware of YouTube think it is either aimed at people 'my age' or at 'everyone', with 77% saying this for Netflix, 71% for Amazon Prime, 60% for ITV and half (51%) for BBC One/BBC Two.
- CITV, CBBC, Sky Kids, Disney Channel and Nickelodeon are mostly seen by 12-15s as being aimed at 'people younger than me'. BBC Three, Channel 4, BBC One/BBC Two, Channel 5 and E4 are mostly seen by 12-15s as being aimed at 'people older than me'.
- YouTube is named as the content provider that would be missed the most by half (48%) of 12-15s, followed by Netflix (19%). No other provider is named by 10% or more.
- Use of the YouTube website or app increases with the age of the child, accounting for 48% of 3-4s, 71% of 5-7s, 81% of 8-11s and 90% of 12-15s. Use of YouTube has increased since 2016 by 11 percentage points for children aged 3-4, by 17 percentage points for 5-7s and by eight percentage points for 8-11s.
- Half of YouTube users aged 3-4 (48%) and a quarter (25%) aged 5-7 only use the YouTube Kids app rather than the main YouTube website or app.

- When given the choice, there is a clear preference for watching YouTube content rather than TV programmes on a TV set, for children aged 8-11 (40% vs. 18%) and 12-15 (46% vs. 15%).
- Parents of younger children aged 3-4 (84%) and 5-7 (69%) are most likely to say their child watches cartoons/ animations/ mini-movies or songs on YouTube. In contrast, the most-watched content among users aged 8-11 and 12-15 is music videos and funny videos/ jokes/ pranks/ challenges.

Differences by gender

- Boys aged 12-15 are more likely than girls to say that YouTube is the content provider they would miss the most (57% vs. 40%) while girls are more likely than boys to name Netflix (25% vs. 14%) or Disney Channel (8% vs. 3%).
- Boys aged 12-15 are more likely than girls to state a preference for watching YouTube videos rather than watching TV programmes on a TV set (50% vs. 32%).
- Boys in each age group between 5 and 15 are more likely than girls to watch game tutorials/ 'walk throughs' and to watch sports/ football clips or videos on YouTube.
- Girls in each age group between 5 and 15 are more likely than boys to say music videos are their favourite kind of content to watch on YouTube, and girls aged 8-15 are more likely to choose vloggers.
- Boys in each age group between 5 and 15 are more likely than girls to say their favourite YouTube content is game tutorials/ 'walk throughs' and sports/ football clips or videos.

Differences by household socio-economic group

- Children aged 12-15 in ABC1 households are more likely than those in C2DE households to ever watch content on BBC One/BBC Two (62% vs. 52%), Amazon Prime (31% vs. 17%), BBC Three (19% vs. 11%) or Sky Kids (16% vs. 8%).
- Children in AB households who watch YouTube are more likely than average to watch 'how-to' videos/ tutorials (48% vs. 40%) while those in DE households are less likely (32% vs. 40%). Children in AB households are also more likely than average to watch film trailers (38% vs. 31%)
- Children in DE households are less likely than average to say that their favourite type of YouTube content is 'how-to' videos/ tutorials (3% vs. 6%).

Awareness and use of content providers

YouTube is the best known and most frequently-used content provider of those shown to 12-15s

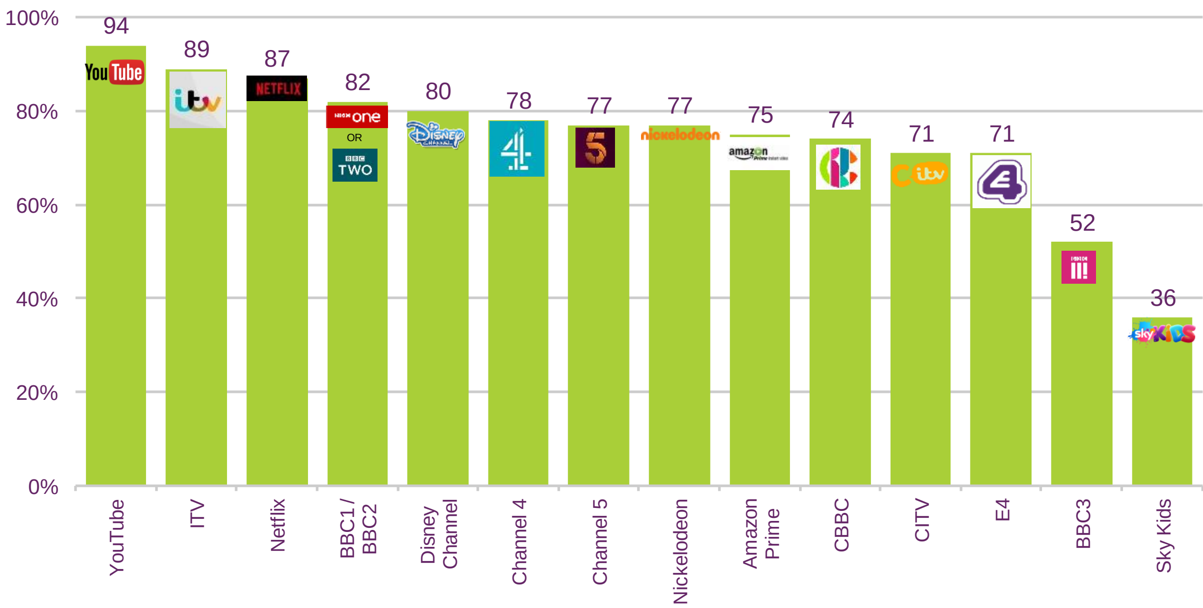
As detailed earlier in the Introductory section of this report (Section 3, in 2017 a separate survey was conducted online with children aged 12-15. The online survey initially dealt with awareness, use and perceptions of content providers that could be used to watch TV programmes, films, videos or clips.

Children aged 12-15 who were interviewed through the online survey were shown the channel logos and names of 14 different content providers and were asked to pick those that they knew. Figure 30 shows the incidence of awareness for each of the 14 content providers, along with the logos and names shown to the 12-15 year-old respondents.

Five providers are known to at least eight in ten 12-15s, with the highest level of awareness for YouTube (94%), followed by ITV[41] (89%), Netflix (87%), BBC One/BBC Two (82%) and Disney Channel (80%). A further four content providers are known to at least three-quarters of 12-15s: Channel 4 (78%), Five/ Channel 5 (77%), Nickelodeon (77%) and Amazon Prime (75%). Three more content providers are known to at least two-thirds of 12-15s: CBBC (74%), CITV (71%) and E4 (71%), while half are aware of BBC Three (52%). Fewest are aware of Sky Kids (36%); this is the only content provider of the 14 which is known to less than half of 12-15s.

[41] Children in Scotland responded about STV and children in Northern Ireland about UTV.

Figure 30: Brand awareness of content providers among 12-15s who go online: 2017



Source: Online survey with children aged 12-15

Q1 – Here are some companies that you may have heard of. Can you please pick those ones that you know? (prompted responses, multi coded)

Base: Children aged 12-15 who go online (500).

The frequency with which 12-15s say they use each of the 14 content providers to watch TV programmes, films, videos or clips is shown in Figure 31. The responses shown are based on all 12-15s, to enable comparisons between each of the providers. The proportion not aware of each content provider (the inverse of those shown as aware in Figure 30) is shown on the right hand side. The content providers are shown in the order of the proportion aware.

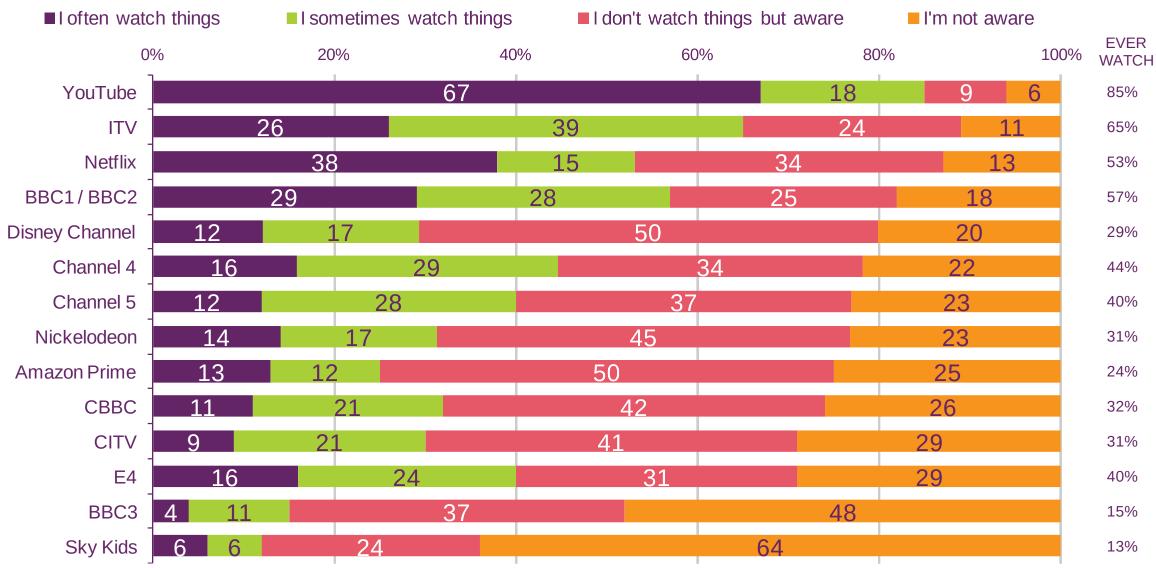
YouTube is the only provider that a majority of 12-15s say they use to 'often' watch things; 67% of all 12-15s give this response. An additional 18% say they 'sometimes' watch, giving a total of 85% of 12-15s who ever watch content on YouTube. ITV is the second most likely content provider to be watched at all by 12-15s (65%), while 53% say they ever watch Netflix. However, a higher proportion of 12-15s say they 'often' watch Netflix (38%) than ITV (26%). BBC One/BBC Two is the only other content provider of the 14 listed which is watched at all by more than half (57%); three in ten (29%) saying they 'often' watch BBC One/BBC Two[42].

Each of the remaining ten content providers shown in Figure 31 are watched by less than half of 12-15s. Almost all of these are more likely to be used for watching 'sometimes' rather than 'often'. The

[42] These findings represent children's own perceptions of their viewing habits, and reflect brand awareness, not just viewing behaviour. The BARB data, set out in Annex 1, suggest that children may be underestimating their viewing of some channels, perhaps because they are more familiar with programme than channel brands. For instance, according to BARB,

exception is Amazon Prime; 13% watch it 'often' and 12% 'sometimes'. While 75% of 12-15s are aware of Amazon Prime, only a quarter ever watch content this way. Four other providers are also relatively well known, but relatively little used, by 12-15s: Disney Channel (80% aware, 29% use), Nickelodeon (77% aware, 31% use), CBBC (74% aware, 32% use) and CITV (71% aware, 31% use). Sky Kids is less well known than the other providers and has relatively low use (36% aware, 13% use)[43].

Figure 31: Content providers used to watch TV programmes, films, videos or clips: 2017



Source: Online survey with children aged 12-15

Q2A - Can you please pick those that you ever use to watch TV programmes, films, videos or clips? (prompted responses, multi -coded)/ Q2B - Please now sort these into two groups based on how often you watch TV programmes, films, videos or clips on them. Can you click on each picture and drag it onto one of these two groups that best describes how frequently you use them to watch things - I sometimes watch things on these/ I often watch things on these (prompted responses, single coded).

Base: Children aged 12-15 who go online (500).

70% of 10-15s in TV households watched at least 15 consecutive minutes of BBC One in an average month in 2016. While the figures are not exactly comparable, they suggest that consumption may be higher than these figures suggest.

[43] Research conducted for the 2017 Communications Market Report also looked at the use of online and on-demand content providers among 12-15s. This found that 66% of 12-15s said they used YouTube to watch TV programmes or films, 54% used BBC iPlayer, 46% Netflix, 32% ITV Hub, 18% Amazon Prime and 18% SkyGo.

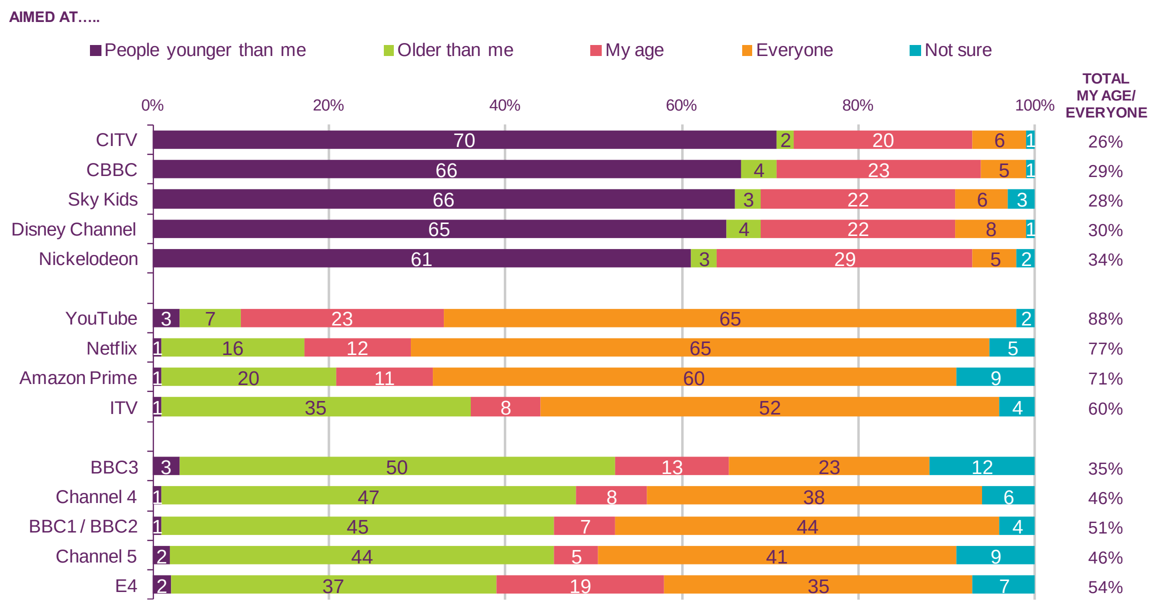
YouTube is the provider 12-15s are most likely to think is aimed either at people their age or at everyone

Children aged 12-15 who were aware of each content provider were asked to choose from five options to say which one best described whom that provider's content was aimed at: 'people younger than me', 'people my age', 'people older than me', 'everyone', or 'not sure'. As shown in Figure 32, almost all children who are aware of a provider can say whom they think that provider's content is aimed at.

The 14 providers are shown in Figure 32 in three groups, determined by the most popular responses from 12-15s aware of the provider. Five providers are mostly seen by 12-15s as being aimed at 'people younger than me': CITV, CBBC, Sky Kids, Disney Channel and Nickelodeon. At the other end of the scale, five providers are mostly seen by 12-15s as being aimed at 'people older than me': BBC Three, Channel 4, BBC One/BBC Two, Channel 5 and E4.

While no provider is seen by a majority of 12-15s as being aimed at 'people my age', four providers are mostly seen by 12-15s as being aimed at 'everyone': YouTube, Netflix, Amazon Prime and ITV. Combining the 'my age' and 'everyone' responses gives us 88% of 12-15s aware of YouTube who put themselves in YouTube's target audience, 77% for Netflix, 71% for Amazon Prime, and 60% for ITV, compared to 51% who put themselves in the target audience for BBC One/BBC Two.

Figure 32: Target audience for provider's content: 2017



Source: Online survey with children aged 12-15

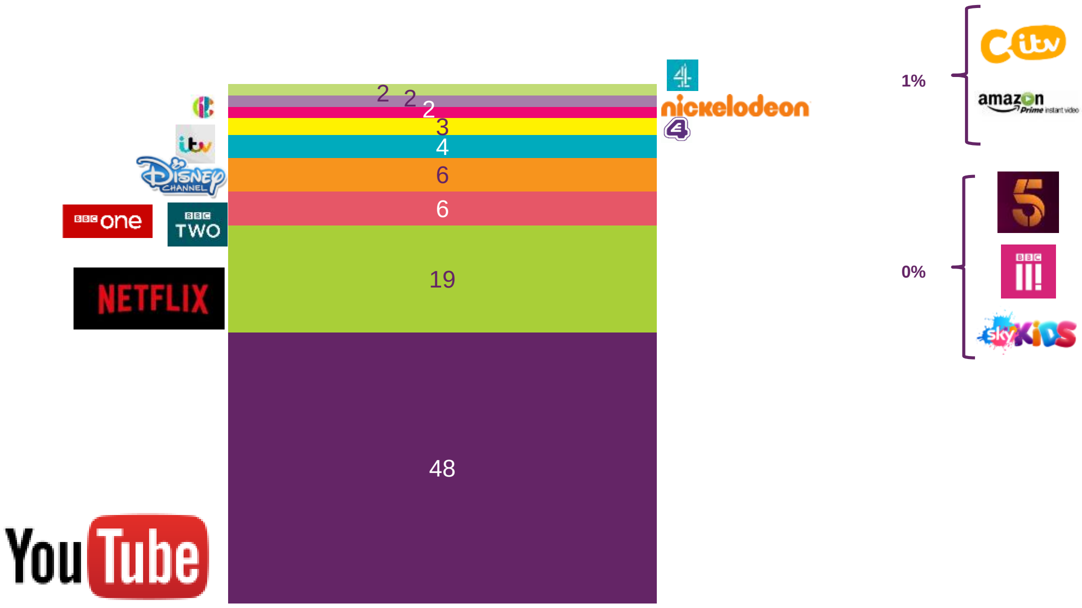
Q3 - Please sort each of these into groups that describe who you think the programmes, films, videos or clips are aimed at. Again, please just drag each picture into one of these groups: Aimed at people younger than me/ Aimed at people my age/ Aimed at people older than me/ Aimed at everyone/ Not sure who these are aimed at. (prompted responses, single coded).

Base: Children aged 12-15 who go online and who are aware of each of the content providers (variable base).

Half of 12-15s say YouTube is the content provider they would miss the most

When asked to say which one of the content providers they would miss the most if they couldn't watch it any more, half (48%) say YouTube and one in five (19%) say Netflix. No other content provider is named by more than one in ten 12-15s.

Figure 33: Content provider that would be missed the most: 2017



Source: Online survey with children aged 12-15

Q4 - Which one of these would you miss the most if you couldn't watch it any more? (prompted responses, single coded).

Base: Children aged 12-15 who go online (500).

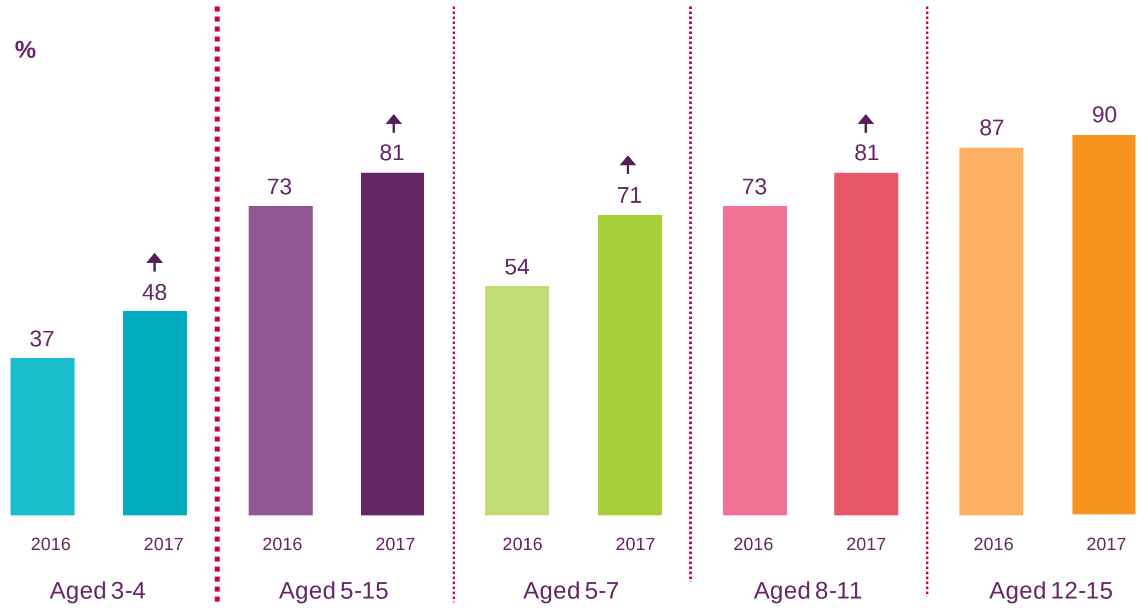
Use of YouTube

Use of YouTube by 3-4s, 5-7s and 8-11s has increased substantially since 2016

Parents of children aged 3-4 and 5-7, and children aged 8-11 and 12-15, were asked whether their child/ they ever used the YouTube website or app. As shown in Figure 34, eight in ten of all children aged 5-15 (81%) ever use YouTube. Use increases with the age of the child, ranging from about half of 3-4s (48%) to nine in ten 12-15s (90%).

Compared to 2016, the incidence of YouTube use has increased by 11 percentage points for children aged 3-4 (48% vs. 37%), by 17 percentage points for children aged 5-7 (71% vs. 54%), and by eight percentage points for children aged 8-11 (81% vs. 73%). As detailed earlier in Section 5, the incidence of going online has also increased since 2016 for 3-4s, 5-7s and 8-11s, so it is possible that the increase in going online is being driven to some extent by use of YouTube.

Figure 34: Incidence of using the YouTube website or app: 2016 and 2017



QP22A/ QC6. Does your child ever use the YouTube website or app? (prompted responses, single coded).

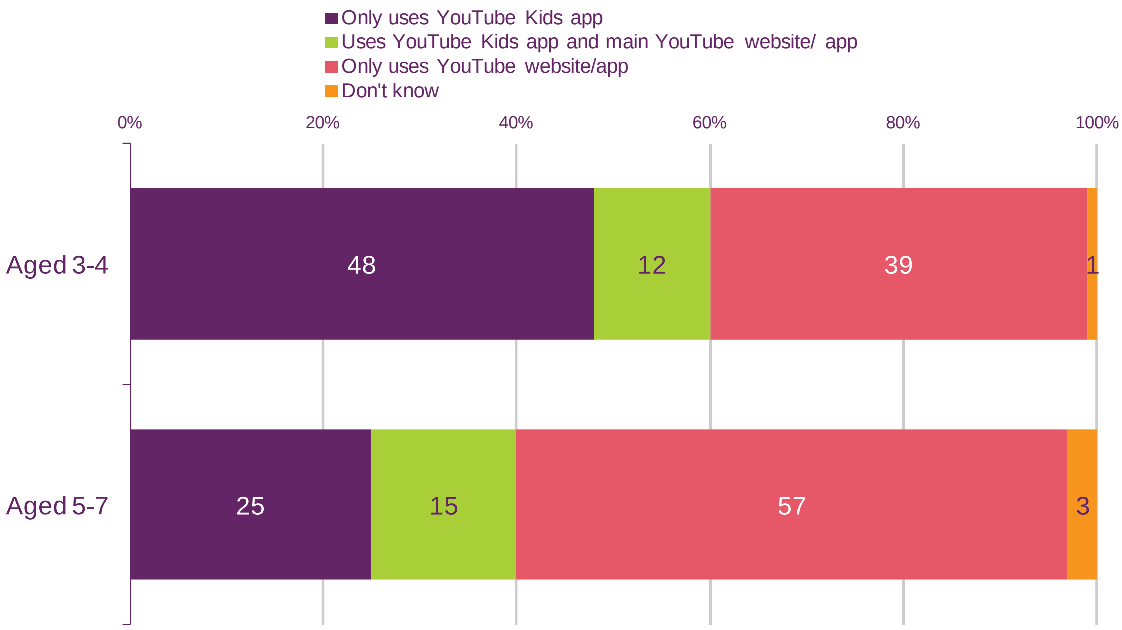
Responses from parents for 3-7 year-olds and from children aged 8-15.

Base: Parents of children aged 3-4 (677) or 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15). Significance testing shows any change between 2016 and 2017.

Half of YouTube users aged 3-4 only use the YouTube Kids app

YouTube Kids is an app specifically aimed at under-5s. Parents of children aged 3-4 and 5-7 whose child uses the YouTube website or app were asked to say whether their child uses only the main YouTube website or app, uses only the YouTube Kids app aimed at under-5s, or uses both. As shown in Figure 35, half (48%) of 3-4s who use YouTube only use the YouTube Kids app, while a quarter (25%) of YouTube users aged 5-7 only use the YouTube Kids app. Use of the main YouTube website or app therefore accounts for half (51%) of 3-4s who use YouTube and close to three-quarters (72%) of 5-7s who use YouTube.

Figure 35: Use of YouTube Kids app and main YouTube website/ app: 2017



QP22B - Do they use the main YouTube website or app, or the app that is aimed specifically at under-5s called YouTube Kids, or do they use both? (unprompted responses, multi-coded).

Base: Parents of children aged 3-7 whose child uses the YouTube website or app (325 aged 3-4, 285 aged 5-7).

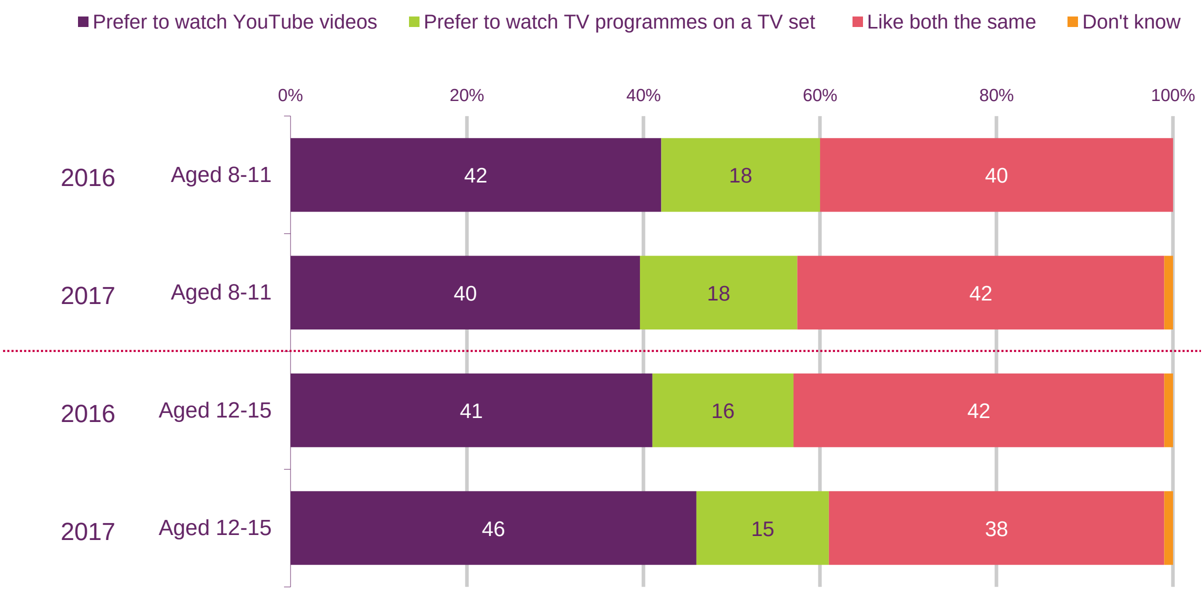
Twice as many 8-11s and three times as many 12-15s say they prefer to watch YouTube videos than watch TV programmes on a TV set

Children aged 8-15 who use YouTube and who watch television on a TV set (79% of 8-15s) were asked whether they preferred to watch YouTube videos, or TV programmes on a TV set, or whether they liked both equally.

There is a clear preference for watching YouTube content over watching TV programmes on a TV set, as shown in Figure 36. Two in five 8-11s (40%) who use YouTube and who watch television on a TV set say they prefer to watch YouTube videos, compared to one in five (18%) who say they prefer to watch TV programmes on a TV set. Among 12-15s, just under half (46%) say they prefer to watch YouTube videos, while 15% say they prefer to watch TV programmes on a TV set. The remainder in each age group say they like both equally.

The responses are similar to those from 2016 for each age group, as shown in Figure 36.

Figure 36: Preference for watching TV programmes on a TV set and YouTube videos, among 8-11s and 12-15s: 2016 and 2017



QC7C – Do you prefer to watch YouTube videos, TV programmes on a TV set, or do you like both the same? (unprompted responses, single coded)

Base: Children aged 8-15 who use the YouTube website or app and watch TV on a TV set (367 aged 8-11 and 393 aged 12-15).

Children aged 3-7 are most likely to watch cartoons on YouTube, while 8-15s are most likely to watch funny videos and music videos

In 2017, parents of 3-7s and children aged 8-15 who use YouTube were prompted with a list of ten types of YouTube content[44] and were asked to say which of these their child/ they ever watched on YouTube.

As shown in Figure 37, there is only one type of content that a majority of parents of 3-4s say their child uses YouTube for: watching cartoons/ animations/ mini-movies or songs (84%). The next most popular YouTube activities among 3-4s are watching funny videos/ jokes/ pranks or challenges (37%), watching music videos (33%) and watching unboxing videos (26%). All other types of activity are undertaken by less than one in five 3-4s who use YouTube.

There are two types of content that a majority of parents of 5-7s say their child watches on YouTube: cartoons/ animations/ mini-movies or songs (69%) and funny videos/ jokes/ pranks or challenges (53%). Four in ten parents of 5-7s say their child watches music videos (40%) with three in ten saying their child watches game tutorials or 'walk-throughs' (30%) or 'how to' videos or tutorials (28%).

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[44] The types of content were amended from those used in the 2016 survey and so no comparisons with 2016 have been made

A majority of 8-11s who use YouTube say they watch funny videos/ jokes/ pranks or challenges (76%) and music videos (61%), while close to half watch cartoons/ animations/ mini-movies or songs (47%) or 'how to' videos or tutorials (45%), and four in ten watch game tutorials or 'walk-throughs' (42%). Around one in three 8-11s (35%) watch content posted by vloggers. Watching 'how-to' videos/ tutorials and vloggers is much more likely for 8-11s than for 5-7s or 3-4s, while watching cartoons/ animations/ mini-movies or songs is less likely for 8-11s (47%) than for younger children.

Three-quarters of YouTube users aged 12-15 say they watch music videos (75%) and seven in ten watch funny videos/ jokes/ pranks or challenges (71%). Children aged 12-15 are more likely than younger children to watch music videos, but do not differ from 8-11s in terms of watching funny videos, or 'how to' videos (43%), game tutorials (40%) or vloggers (40%). YouTube users aged 12-15 are more likely than any other age group to say they watch film trailers, clips or programme highlights (43%).

Figure 37: Types of content watched on the YouTube website or app, by age: 2017

All who use the YouTube website or app	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Base	325	1100	285	388	427
Funny videos/ jokes/ pranks/ challenges	37%	69%	53%	76%	71%
Music videos	33%	62%	40%	61%	75%
Cartoons/ animations/ mini-movies or songs	84%	48%	69%	47%	35%
'How-to' videos or tutorials about hobbies/ sports/ things they are interested in	16%	40%	28%	45%	43%
Game tutorials/ walk-throughs/ watching other people play games	12%	39%	30%	42%	40%
Vloggers or YouTube personalities	6%	32%	16%	35%	40%
Film trailers, clips of programmes, 'best-bits' or programme highlights	8%	31%	16%	26%	43%
Sports/ football clips or videos	4%	28%	14%	33%	32%
Whole programmes or films	13%	22%	14%	22%	27%
'Unboxing' videos - e.g. where toys are unwrapped or assembled	26%	21%	20%	23%	20%

QP22C/ QC7A – Here is a list of the sort of things that your child may have watched on YouTube. Which, if any of these types of things do they watch on YouTube? (prompted responses, multi-coded) Responses from parents of 3-7s year olds and from children aged 8-15.

Parents of 3-4s say that TV programmes, films and cartoons are their child's favourite type of content on YouTube

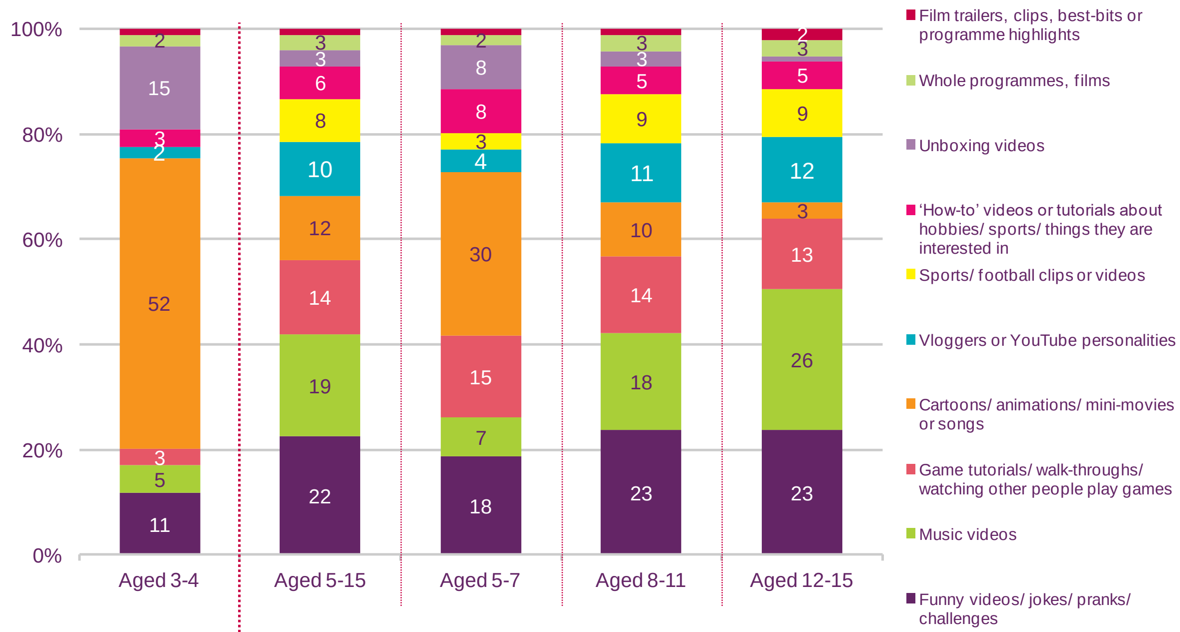
Parents of 3-7s and children aged 8-15 who use YouTube were also asked to nominate their favourite type of content on YouTube.

As shown in Figure 38, the category shown as cartoons/ animations/ mini-movies or songs is the most popular category of content watched on YouTube by 3-4s (52%); less than one in five parents of 3-4s mention either funny videos/ jokes/ pranks or challenges (11%) or unboxing videos (15%).

Parents of children aged 5-7 are, like parents of 3-4s, most likely to nominate cartoons/ animations/ mini-movies or songs as their child's favourite types of YouTube content (30%), followed by funny videos/ jokes/ pranks or challenges (18%) and game tutorials or 'walk-throughs' (15%). All other content types are nominated by less than one in ten parents of 5-7s.

The same proportion of 8-11s and 12-15s (both 23%) mention funny videos/ jokes/ pranks or challenges as their favourite type of content, making this the most popular response for 8-11s. Children aged 12-15 are, however, most likely to nominate music videos as their favourite type of content (26%); this is less likely among 8-11s (18%). Children aged 8-11 (14%) and 12-15 (13%) are equally likely to nominate game tutorials or 'walk-throughs' as their favourite, with a similar proportion of 8-11s (11%) and 12-15s (12%) naming content posted by vloggers. While popular with younger children, few 8-11s (10%) or 12-15s (3%) mention cartoons/ animations/ mini-movies or songs as their favourite type of YouTube content.

Figure 38: Favourite type of content watched on the YouTube website or app, by age: 2017



QP22D/ QC7B – And which one of these things is their favourite thing to watch on YouTube? (prompted responses, single coded)
Responses from parents of 3-7 year-olds and from children aged 8-15.
Base: Parents whose child uses YouTube website or app aged 3-4 (325) or 5-15 (1100 aged 5-15, 285 aged 5-7, 388 aged 8-11, 427 aged 12-15).

Differences by gender and socio-economic group

Boys have a stronger affinity with YouTube than girls, and are more likely than girls to prefer watching YouTube to watching TV programmes on a TV set

While there are no differences in awareness or overall use of YouTube, boys aged 12-15 (interviewed in the online survey) are more likely than girls to name YouTube as the content provider they would miss the most if they couldn't watch it any more (57% vs. 40%). YouTube is also the content provider most likely to be missed by girls aged 12-15, but girls are more likely than boys to say they would miss Netflix (25% vs. 14%) or Disney Channel (8% vs. 3%).

Boys aged 8-11 are more likely than girls to say they prefer to watch YouTube videos than TV programmes on a TV set (50% vs. 32%), while girls aged 8-11 are more likely to say they like both equally (45% vs. 37%) or that they prefer to watch TV programmes on a TV set (22% vs. 12%). These differences are not evident among 12-15s.

In terms of the types of content watched on YouTube, boys in each age group among 5-15s are more likely than girls to watch game tutorials or 'walk-throughs' (40% vs. 19% for 5-7s, 59% vs. 26% for 8-11s, 53% vs. 27% for 12-15s). This difference between boys and girls in each age group among 5-15s also applies to watching sports/ football clips or videos (40% vs. 19% for 5-7s, 59% vs. 26% for 8-11s, 53% vs. 27% for 12-15s), and this extends to 3-4s (6% vs. 1%). Boys aged 8-11 are more likely than girls to watch funny videos/ jokes/ pranks or challenges (84% vs. 69%).

There is no type of YouTube content that girls in each age group among 5-15s are more likely than boys to watch, but music videos are more likely to be watched by girls aged 3-4 (39% vs. 27%) and 8-11 (68% vs. 55%). Girls aged 12-15 are more likely than boys to watch 'how-to' videos/ tutorials (48% vs. 38%) and vloggers (49% vs. 30%).

Boys and girls aged 3-4 do not differ in terms of their favourite type of YouTube content, but differences are evident for each of the age groups among 5-15s. Girls in each age group from 5 to 15 are more likely than boys to say music videos are their favourite thing to watch on YouTube (13% vs. 2% for 5-7s, 25% vs. 11% for 8-11s, 34% vs. 18% for 12-15s), while older girls are more likely than boys to say their favourite on YouTube is watching vloggers (14% vs. 7% for 8-11s, 18% vs. 7% for 12-15s). Boys in each age group from 5 to 15 are more likely than girls to say that game tutorials or 'walk-throughs' are their favourite thing watch (22% vs. 7% for 5-7s, 21% vs. 7% for 8-11s, 20% vs. 7% for 12-15s). Boys aged 5-15 are also more likely than girls to say their favourite YouTube content is sports/ football clips or videos (5% vs. 1% for 5-7s, 15% vs. 2% for 8-11s, 17% vs. 1% for 12-15s).

Children aged 5-15 in AB socio-economic group households are more likely than average to watch 'how-to' videos on YouTube, while those in DE households are less likely

Children aged 12-15 in C2DE households (interviewed on the online survey) are more likely than those in ABC1 households to be aware of ITV as a content provider (92% vs. 86%). This is the only difference in awareness of providers by household socio-economic group, but there are several differences in the extent to which 12-15s ever use different providers to watch TV programmes, films or video clips. Children aged 12-15 in ABC1 households are more likely than those in C2DE households to ever watch content on BBC One/BBC Two (62% vs. 52%), Amazon Prime (31% vs. 17%), BBC Three (19% vs. 11%) and Sky Kids (16% vs. 8%).

In terms of the types of content watched on YouTube, there are a small number of differences by socio-economic group compared to the average. Children in AB households are more likely than average to watch ‘how-to’ videos/ tutorials (48% vs. 40%) while those in DE households are less likely (32% vs. 40%). Children in AB households are also more likely than average to watch film trailers (38% vs. 31%).

Children in DE households are less likely than average to say that their favourite type of YouTube content is ‘how-to’ videos/ tutorials (3% vs. 6%), but there are no other differences by socio-economic group compared to the average.

8. Children's attitudes to content

This section looks at older children's attitudes to content (mostly among those aged 12-15). It addresses their reasons for choosing what they watch, and their preferences, in terms of the provider they would turn to first to watch each type of content they consider important.

It also looks at the extent to which they feel it is important for content to reflect their experiences, in terms of showing people their age, or those who look like them, who live where they live, and do the sorts of things they and their friends like to do. It continues by assessing whether children feel there are enough programmes that meet these criteria.

It concludes by addressing children's attitudes towards screen time in terms of whether they consider it hard to control their screen time, and whether they feel they have a good balance between screen time and doing other things.

Key findings

- 12-15s are most likely to cite 'content that makes them laugh' as something that is important to them when choosing what to watch (74%), followed by content that relaxes them (61%) or that gives them something to talk about with their friends (56%). Forty-eight per cent choose content that helps them learn about or find out about new things and 39% choose content that makes them think.
- YouTube is the most popular of the 14 providers that 12-15s were prompted with, and is the content brand they say they would go to first for all the types of content they identified as important.
- Children aged 12-15 are more likely to say it is important that the content they watch includes people their age (53%) or people doing the same sort of things that they/ their friends do (49%), than that it includes people living in the same part of the country as them (23%) or people who look like them (22%).
- A majority of 8-11s (76%) and 12-15s (65%) feel there are enough programmes for children their age, and enough programmes showing children doing the sorts of things they/ their friends do (63% and 54%), while around half feel there are enough programmes that show children who look like them (52% and 50%). Less than half (48% and 45%) feel there are enough programmes that show children who live in the same part of the country as them.
- However, a sizeable minority of 8-15s feel that there are not enough programmes across each of these areas. Children aged 8-11 are most likely to say this about programmes that show children who look like them (35%) and 12-15s are most likely to say this about programmes that show children who live in the same part of the country as them (41%).
- Although two-thirds of 12-15s (67%) agree that they have a good balance between screen time and doing other things, and more than half of 12-15s disagree that they find it hard to control their screen time (53%), more than a quarter of 12-15s agree with the latter statement (27%).

Differences by gender

- Boys aged 12-15 who go online are more likely than girls to consider YouTube their favourite provider – in terms of the one they would turn to first – when choosing to watch content that makes them laugh (72% vs. 50%), content 'to relax / to take time out' (45% vs. 25%) or content that gives them something to talk about with friends (65% vs. 51%).
- Boys aged 12-15 who go online are also more likely than girls to say that YouTube is best at showing people their age (57% vs. 34%) and best at showing people doing the same sort of things that they and their friends do (59% vs. 43%).

Reasons for selecting content to watch, and providers used to meet these needs

When choosing to watch something, 12-15s are most likely to say it is important to watch content that makes them laugh, or helps them to relax

Children aged 12-15 were asked a series of questions in the online survey relating to their reasons for choosing what to watch.

As shown in Figure 39, children aged 12-15 who go online were prompted with eight possible reasons and were asked to select those that they considered important to them when choosing something to watch.

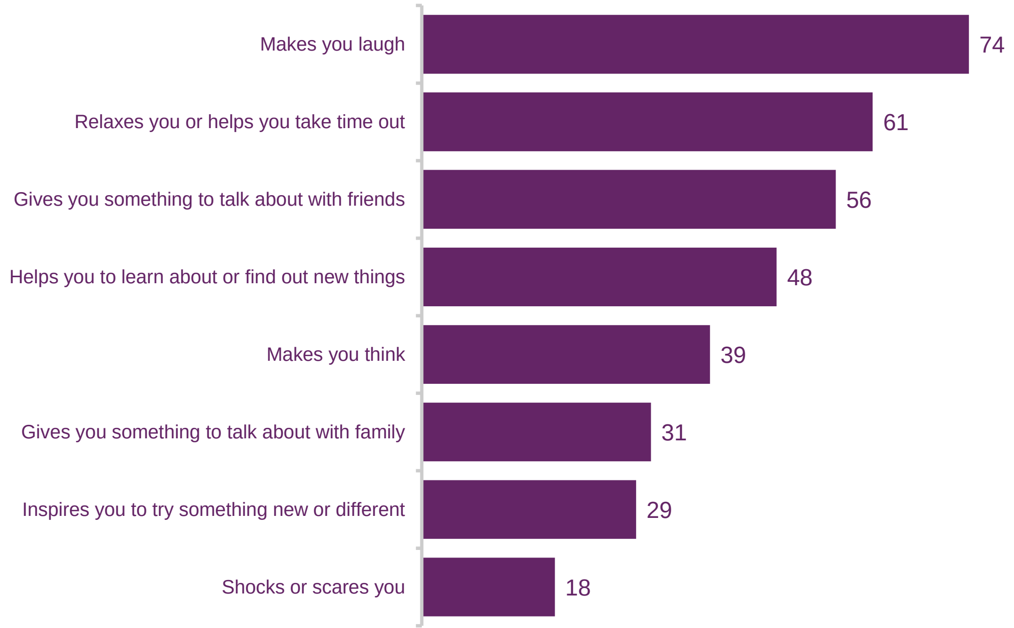
Three reasons were considered important by more than half of 12-15s. Three in four (74%) say it is important that content makes them laugh, while three in five (61%) say it is important that it relaxes them or helps them to take time out. Giving them something to talk about with their friends is also considered an important reason to choose to watch something by more half of 12-15s (56%).

Close to half of 12-15s (48%) say it is important that content helps them learn about or find out new things, while two in five (39%) would choose to watch things that make them think.

A comparable number of children, three in ten, say it is important to choose something to watch that gives them something to talk about with their family (31%) or inspires them to try something new or different (29%).

Slightly less than one in five (18%) think it is important to choose to watch things that shock or scare them.

Figure 39: Reasons for choosing content to watch among 12-15s who go online: 2017



Source: Online survey with children aged 12-15

Q5 - Here are some reasons why you might choose to watch something. Click on each reason if you think it is important to you when choosing something to watch? (prompted responses, multi-coded)

Base: Children aged 12-15 who go online (500).

YouTube stands out as the provider 12-15s would turn to first when choosing to watch each type of content they consider important

For each of the reasons 12-15s said were important to them when choosing content to watch, the children were asked which provider, among those they use, they would turn to first to watch this type of content.[45] The results are shown in Figure 40.

The dotted line shown in the Figure separates out those providers that were mentioned at least once by 10% or more of 12-15s who rated each type of content as important when choosing content to watch. The remaining providers are then listed alphabetically.

The main findings are summarised below:

- YouTube is the provider that 12-15s would turn to first to watch all seven types of content - with a majority nominating YouTube when choosing to watch something that makes them laugh (61%), gives them something to talk about with friends (58%), helps them to learn about or find out about new things (54%), or that inspires them to try something new or different (52%). While YouTube is still the most popular provider for the remaining three types of content, it is mentioned by fewer children, around one in three.

[45] Due to the low base of 12-15s saying it is important to watch things that shocks or scares them (88 interviews) it is not possible to show the provider they would choose first to watch this type of content

- Netflix is the next most popular provider that 12-15s would turn to first to watch four types of content: to watch something which helps them to relax or to take time out (29%), that gives them something to talk about with friends (18%), that makes them laugh (11%) or that inspires them to try something new or different (9%).
- For three types of content, BBC One or BBC Two are the next most popular providers (after YouTube): when choosing to watch something that makes them think (26%), that gives them something to talk about with their family (17%) or that helps them to learn about or find out about new things (16%).
- ITV is the only other provider to be mentioned by more than one in ten of 12-15s across any of the content types – 14% would turn to ITV first when choosing to watch something that gives them something to talk about with their family.

Figure 40: Provider that child would turn to first when choosing to watch content considered important by 12-15s who go online: 2017

	Makes you laugh	Relaxes you or helps you to take time out	Gives you something to talk about with your friends	Helps you to learn about or find out about new things	Makes you think	Gives you something to talk about with your family	Inspires you to try something new or different
Base	**364**	**304**	**281**	**240**	**196**	**158**	**146**
YouTube	61%	35%	58%	54%	34%	31%	52%
Netflix	11%	29%	18%	4%	10%	13%	9%
BBC1/ BBC2	1%	5%	3%	16%	26%	17%	6%
ITV	3%	7%	3%	2%	7%	14%	3%
Amazon Prime	1%	3%	0%	2%	1%	2%	3%
BBC3	0%	0%	1%	2%	1%	2%	0%
CBBC	0%	2%	1%	5%	2%	0%	6%
Channel 4	1%	2%	2%	4%	7%	3%	4%
Channel 5	1%	1%	1%	1%	4%	2%	2%
CITV	1%	1%	1%	1%	0%	0%	0%
Disney Channel	4%	7%	5%	4%	2%	4%	4%
E4	4%	4%	3%	1%	2%	3%	3%
Nickelodeon	4%	2%	1%	1%	1%	3%	2%
Sky Kids	0%	0%	0%	0%	0%	0%	3%
Don't know	5%	2%	4%	4%	3%	5%	4%

Source: Online survey with children aged 12-15.

Q7/Q8/Q9/Q10/Q11/Q12/Q13 - Which one of these would you choose first to watch something that……. (prompted responses, multi-coded).

Base: Children aged 12-15 who go online that say it is important that the content they watches (variable base).

Importance of and attitudes to watching content that reflects the child's experience

Children aged 12-15 are most likely to say it is important to watch things that include people their age, or that show people doing the same sorts of things they do

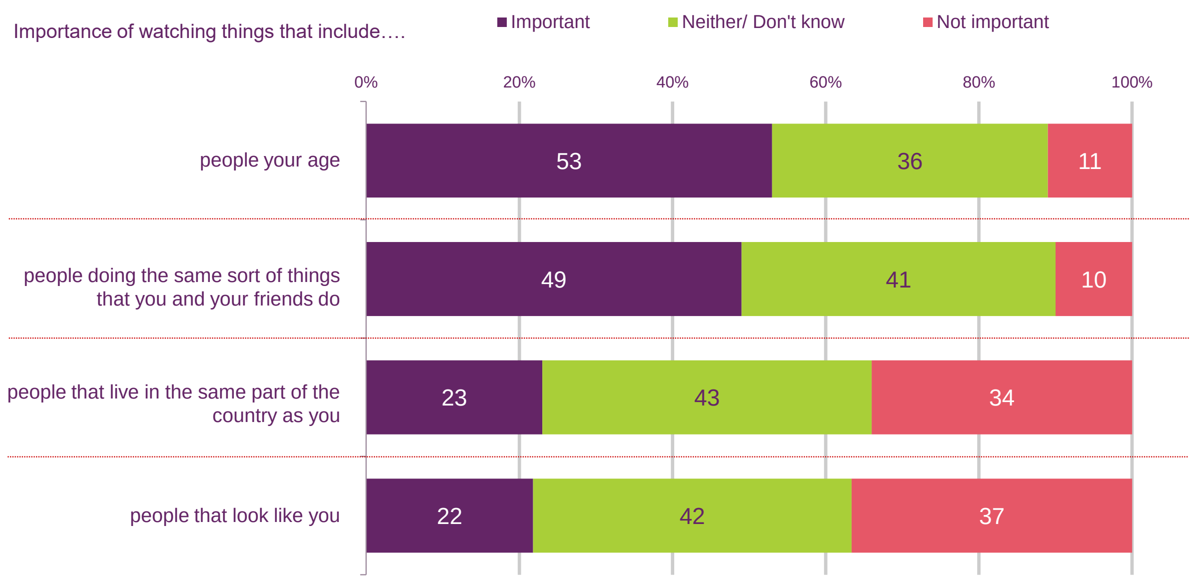
The online survey also asked 12-15s the following questions: "How important is it to watch things that include people your age/ that include people who look like you/ that include people who live in the same part of the country as you/ that include people doing the same sort of things that you and your friends do". For each of the four questions, the children could select important, not important, neither/ nor, or that they were unsure. The results are shown in Figure 41.

More than half of 12-15s (53%) said it was important to watch things that included people their age, with one in ten saying this was not important (11%).

Half of 12-15s (49%) said that it was important to watch things that included people doing the same sort of things that they and their friends do, with one in ten saying this was not important (10%).

Compared to these first two statements, children are less likely to say it is important to watch things that include people who live in the same part of the country as them (23%), or that include people who look like them (22%).

Figure 41: Importance of viewing various types of content, among 12-15s who go online: 2017



Source: Online survey with children aged 12-15.

Q6 - How important is it to watch things that include…….. (prompted responses, single coded).

Base: Children aged 12-15 who go online (500).

YouTube is the provider that 12-15s say is best at providing content that reflects them and their experiences

Children aged 12-15 who said it was important to them to watch each of the types of content that reflect their experience (Figure 41) were asked to say which of the content providers they use[46] would be best for each of these types. The results are shown in Figure 42 for those providers that were mentioned by more than 3% of children in any of the four categories.

YouTube is the provider that children are most likely to say is the best at providing each type of content that reflects their experience. Half (51%) say that YouTube is the best at showing people doing the same sort of things that they and their friends do, with slightly fewer (46%) saying it is the best at including people their age. About a third (36%) say that YouTube is the best at including people who live in the same part of the country as them, or people who look like them (31%).

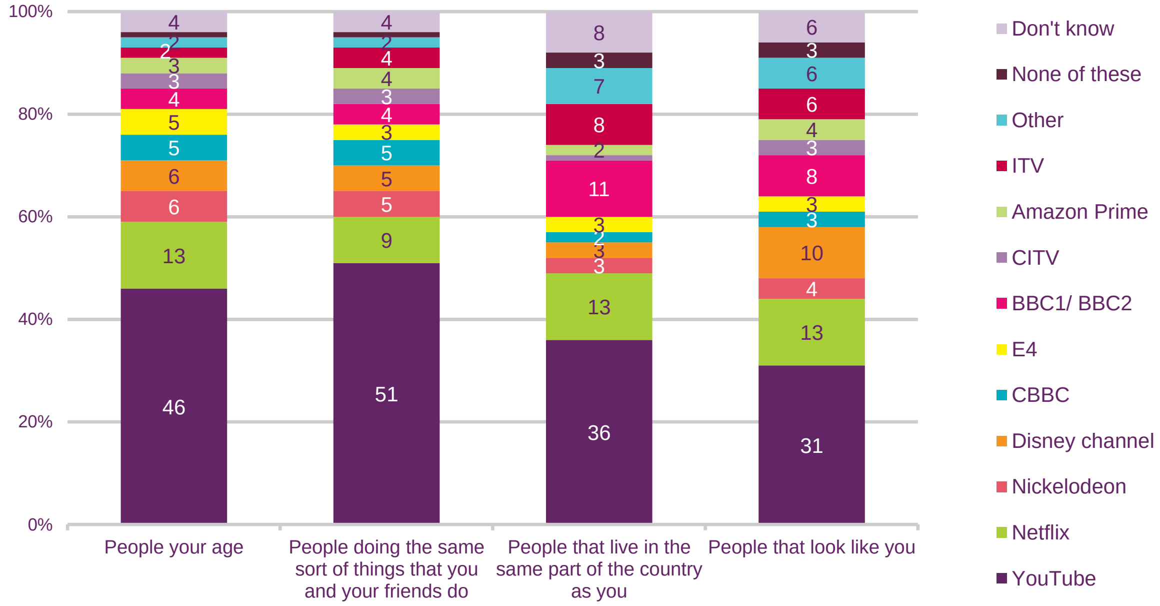
After YouTube, Netflix is the next most-cited provider, mentioned by around one in eight 12-15s (13%) as the best for including people their age, or people who live in the same part of the country as them, and for including people who look like them. One in ten (9%) say that Netflix is the best at including people who live in the same part of the country as them.

One in ten 12-15s who say it is important to watch things that include people who look like them say that the Disney Channel is the best at doing this (10%), while 8% say this about BBC One or BBC Two. Slightly more (11%) say that BBC One or BBC Two are best at including people who live in the same part of the country as them.

Each of the other providers was chosen by around one in 12 (8%), or fewer, 12-15s as being the best at providing each type of content.

[46] As reported on in Section 7 - Figure 31

Figure 42: Provider that 12-15s who go online consider best at providing particular types of content that reflect their experience: 2017



Q15/ Q16/ Q17/ Q18 – You think it is important for the things you watch to include people your age/ people doing the same sort of things that you and your friends do/ people who live in the same part of the country as you/ people who look like you. Which one of these is the best at including people your age/ people doing the same sort of things that you and your friends do/ people who live in the same part of the country as you/ people who look like you? (prompted responses, single coded) - only showing responses by more than 3% of all 12-15s

Base: Children aged 12-15 who go online who say it is important that the things they watch include people their age (268)/ people doing the same sort of things that they and their friends do (248)/ people who live in the same part of the country as them (121)/ people who look like them (114).

Two in five 12-15s say there are not enough programmes that show children living in the same part of the country as them, while about a third of 8-11s say there are not enough programmes showing children who look like them

In addition to asking children about the importance of watching various types of content that reflect their experience (the online study), the main in-home study asked whether they thought the volume of programming was adequate across these key measures. Children aged 8-15 who watch TV programmes or films were asked whether they felt there were enough programmes for children their age, that showed children doing the sorts of things they and their friends do, that showed children who look like them, and that showed children who live in the same part of the country as them. The results are shown in Figure 43.

Three in four 8-11s (76%) feel there are enough programmes for children their age, more than the two in three 12-15s who say this (65%). Children aged 8-11 are also more likely than 12-15s to feel that there are enough programmes that show children doing the sorts of things that they and their friends do (63% vs. 54%).

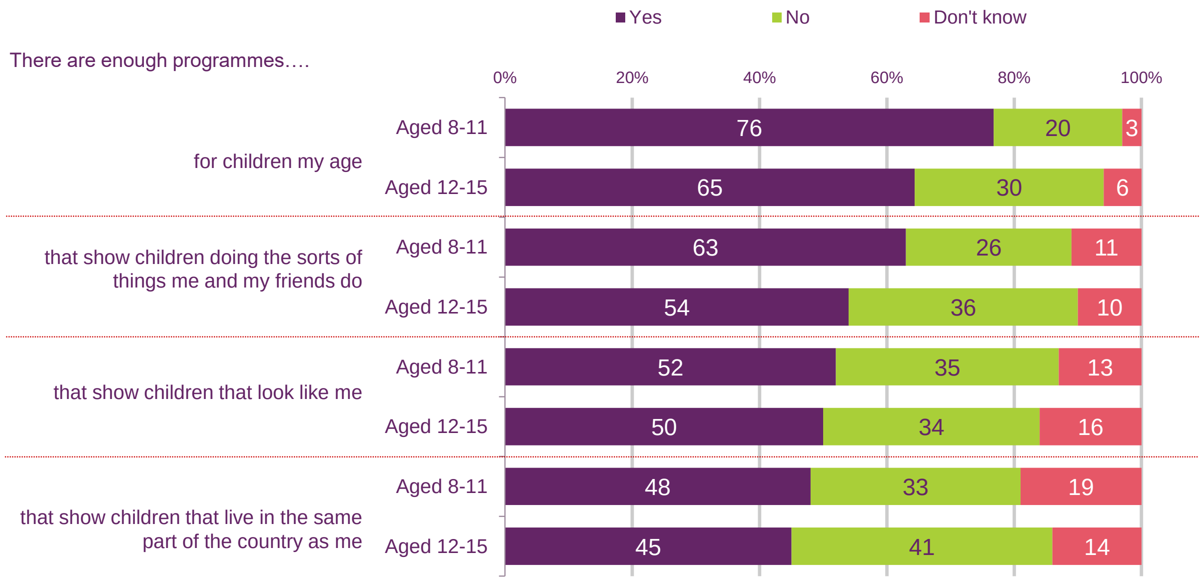
Around half of 8-11s (52%) and 12-15s (50%) feel there are enough programmes that show children who look like them, while less than half in each age group (48% for 8-11s and 45% for 12-15s) feel there are enough programmes that show children who live in the same part of the country as them.

However, a sizeable minority of 8-15s feel that there are not enough programmes across each of these areas. Children aged 8-11 are most likely to say this about programmes that show children who look like them (35%) and 12-15s are most likely to say this about programmes that show children who live in the same part of the country as them (41%).

As shown in Figure 41 and Figure 43 although most 12-15s say it is important to watch content that shows children their age (53%), three in ten (30%) do not think there are enough programmes that do this. Half of 12-15s (49%) feel it is important to watch content which shows children doing the sort of things that they and their friends do, and more than a third (36%) feel there are not enough programmes that do this.

Although fewer 12-15s consider it important to watch content that shows children who live in the same part of the country as them (23%) or who look like them (22%), at least a third feel that there are not enough programmes which meet these needs (41% and 34% respectively).

Figure 43: Attitudes towards TV programmes among 8-15s: 2017



QC4A/B/C/D –I'm going to read out some things about the TV programmes that you watch. Which answer would you choose for each (prompted responses, single coded).

Base: Children aged 8-15 who watch TV at home or elsewhere (488 aged 8-11, 467 aged 12-15).

Children's attitudes to screen time

As in 2016, the majority of children aged 12-15 think they have a good balance between screen time and doing other things

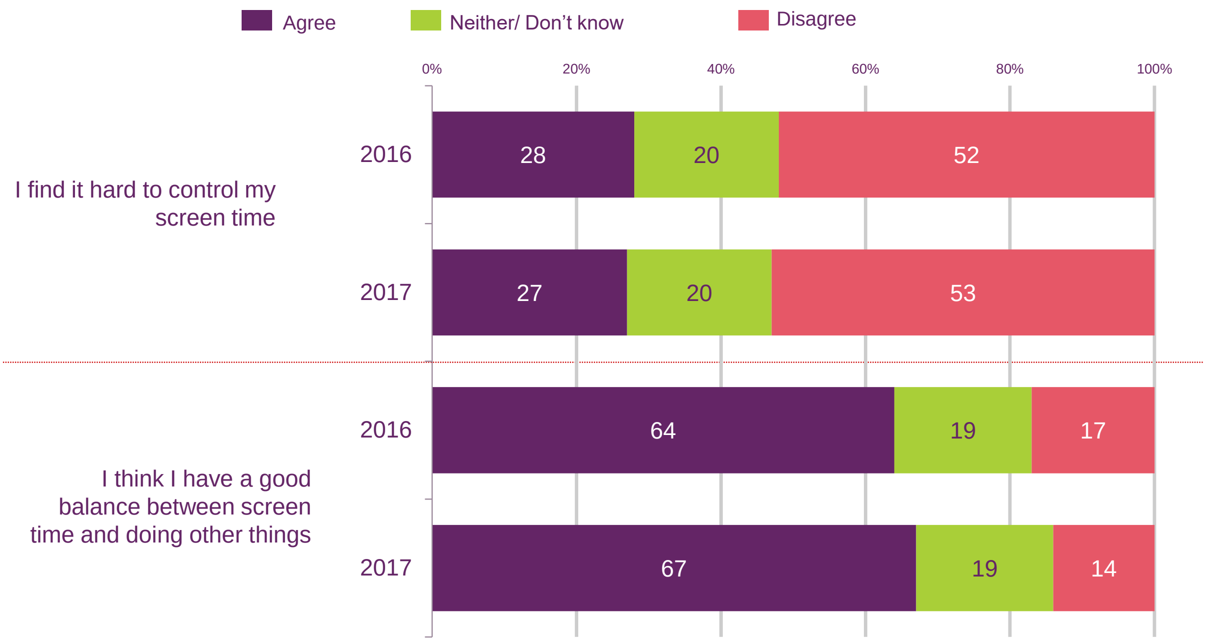
Since 2015, 12-15s have been asked about their attitudes towards their overall screen time. These questions are also asked of the parents. The parents' responses, and how these compare to the responses of their children, are set out in Section 14.

Children aged 12-15 were asked whether they found it difficult to control their screen time and whether they felt they had a good balance between screen time and doing other things.

As in 2016, around half of 12-15s disagree that they find it hard to control their screen time (53%) while slightly more than a quarter agree (27%).

When asked about the balance between screen time and doing other things, two-thirds of 12-15s (67%) believe they have a good balance; this is also unchanged since last year.

Figure 44: Agreement with attitudinal statements about screen time among 12-15s: 2016, 2017



QC51B/C – I'd now like to ask you some questions about your screen time. By screen time I mean the time you spend looking at screens on all the different devices you may use, including TV, mobile phones, laptops, tablets and gaming devices.

Base: Children aged 12-15 (479).

Differences by gender and socio-economic group

Boys aged 12-15 are more likely than girls to prioritise YouTube as their favourite provider for watching things that make them laugh, or that relax them, or give them something to talk about with their friends

While there are no differences by gender in the reasons given for choosing to watch each type of content (Figure 39), there are differences in the preferred content provider.[47] Boys aged 12-15 who go online are more likely than girls to say they would choose YouTube to watch something that makes them laugh (72% vs. 50%), that relaxes them/ helps them to take time out (45% vs. 25%) or that gives them something to talk about with friends (65% vs. 51%). Girls aged 12-15 are more likely to say they would turn to Netflix (15% vs. 7%) or the Disney channel to watch something that makes them laugh (7% vs. 2%). Girls aged 12-15 are also more likely than boys to say they would choose CBBC to watch something that helps them learn about new things (8% vs. 2%).

Boys aged 12-15 who go online are also more likely than girls to say that YouTube is best at providing content that shows people their age (57% vs. 34%) and best at showing people doing the same sort of things that they and their friends do (59% vs. 43%). Girls aged 12-15 are more likely than boys to say that CBBC is best at showing people their age (9% vs. 2%).

Boys aged 8-11 who watch TV programmes or films are more likely than girls to say that there are not enough programmes that show children doing the sorts of things they or their friends do (30% vs. 22%).

There is only one difference by household socio-economic group[48]. Children aged 12-15 in ABC1 households who go online are more likely than those in C2DE households to say that it is important to watch things that include people who look like them (25% vs. 17%).

[47] Where base sizes are large enough to look at by gender – so more than 100 interviews for boys and for girls aged 12-15
[48] Where base sizes are large enough to look at by household socio economic group - so more than 100 interviews in ABC1 and C2DE socio-economic groups

9. Social media, live streaming and gaming

This section looks in more detail at children's use of the internet for social media, in terms of overall incidence of use, the sites and apps on which users have profiles, and the one they consider to be their main social media site or app. It also covers awareness and use of live streaming among 12-15s. This section concludes with children's experience of playing games online.

Key findings

- Three-quarters (74%) of 12-15 year olds have a profile on a social media or messaging site or app. No 3-4s (0%) and 3% of 5-7s have a profile, rising to almost a quarter (23%) of 8-11s. None of these measures have changed since 2016.
- Among those with a social media profile, 12-15s are less likely than in 2016 to use Facebook (74% vs. 82%) and more likely to use WhatsApp (32% vs. 24%).
- Less than half (40%) of 12-15s with a profile say that Facebook is their main social media profile (down from 52% in 2016) while 32% now say Snapchat is their main profile (up from 16%).
- Three-quarters (76%) of 12-15s who go online have heard of live streaming services such as Facebook Live, YouTube Live or Instagram Live. One in ten (10%) have personally shared videos using a live streaming service and a third (35%) have not shared content but have watched live streams.
- More than half of all 8-11s (56%) and 12-15s (61%) ever play games online. More than one in ten 8-11s (13%) and 17% of 12-15s say they play games online with people they have never met. These measures are unchanged since 2016.
- Among those who play online games, 15% of 8-11s and 19% of 12-15s say they use chat features within the game to talk to people they only know through the game, also unchanged since 2016.

Differences by gender

- There is no difference in the overall incidence of having a profile on social media or messaging sites or apps between boys and girls in each age group. However, girls aged 12-15 are more likely than boys to have a profile on Musical.ly (15% vs. 4%).
- Girls aged 12-15 are more likely than boys to say their main profile is on Snapchat (39% vs. 24%) while boys aged 12-15 are more likely to say to say their main profile is on YouTube (10% vs. 4%).
- Girls aged 12-15 are more likely than boys to have shared videos through live streaming services (14% vs. 7%).
- Experience of online gaming is higher among boys than girls for both 8-11s (78% vs. 57%) and 12-15s (88% vs. 64%).
- Boys aged 8-11 (22% vs. 7%) and 12-15 (30% vs. 9%) who play games are more likely than girls to play against people they don't know, and boys aged 12-15 are more likely than girls to use the chat features to chat with people they only know through gaming (23% vs. 11%).

Differences by household socio-economic group

- Among all children aged 5-15 with a social media profile, Facebook is more likely to be used by children in DE households (75% vs. 65%), while profiles on YouTube are more likely among children in AB households (46% vs. 33%).
- Awareness and use of live streaming does not differ by socio-economic group; neither are there any differences in the incidence of online gaming, the types of online gaming undertaken or the use of chat features when playing games online.

Using social media and live streaming

Three-quarters of 12-15s who go online have a social media profile

Parents of children aged 3-4 and 5-7 who go online, and children aged 8-11 and 12-15 who go online, were prompted with a description of social media or messaging sites or apps[49] and were asked whether they/ their child had a profile or account on any of these types of sites or apps.

As shown in Figure 45, very few parents of children aged 3-4 (1%) or 5-7 (3%) who go online say their child has a social media profile. A quarter of 8-11s who go online (24%) and three-quarters of 12-15s who go online (75%) have a social media profile. Measures for each age group and across all 5-15s (39%) are unchanged since 2016.

When rebased to report on all children (as opposed to those who go online, as shown in Figure 45), 0% of 3-4s and 36% of 5-15s have a social media profile, also unchanged since 2016. This overall figure among all 5-15s breaks out by age as follows: 3% of 5-7s, 23% of 8-11s and 74% of 12-15s.

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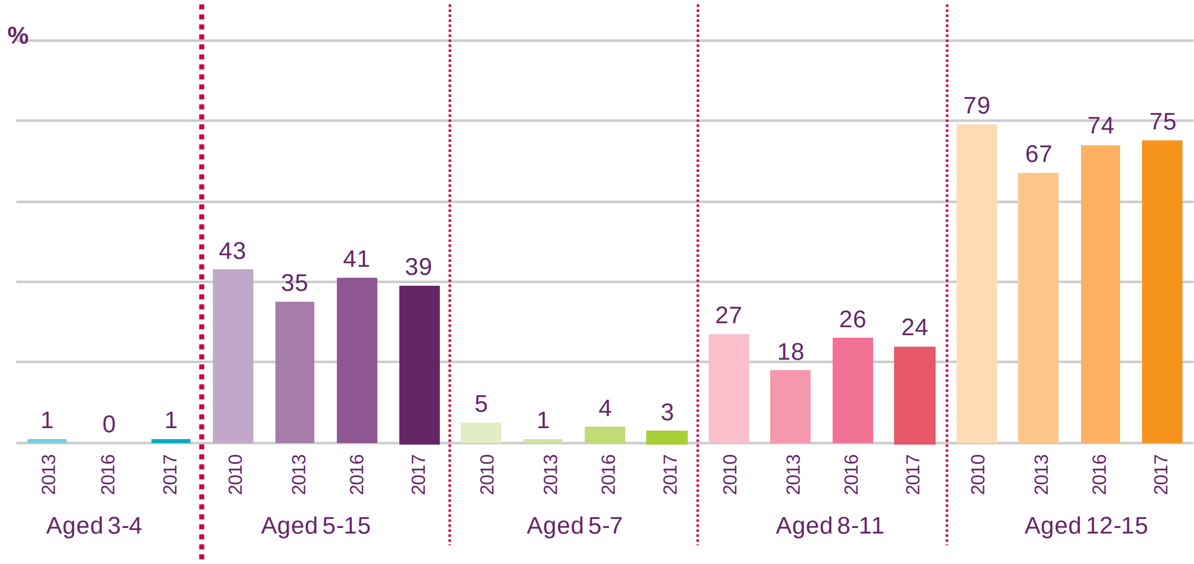
[49] I'd now like to ask you some questions about your (child's) use of social media or messaging sites or apps* - websites or apps like Facebook, Twitter, Instagram, Tumblr, Snapchat, WhatsApp and some activities on YouTube. Does your child/ Do you have a profile or account on any of these types of sites or apps?
*Definition expanded in 2017 to include messaging sites or apps in the description, previously asked about 'social media sites or apps'

Figure 45: Children who go online with an active social media profile, by age: 2010, 2013, 2016 and 2017



QP43/ QC19 – I'd now like to ask you some questions about your child's use of social media or messaging sites or apps - websites or apps like Facebook, Twitter, Instagram, Tumblr, Snapchat, WhatsApp and some activities on YouTube. Does your child have a profile or account on any of these types of sites or apps? (prompted responses, single coded). Responses from parents for 3-7 year-olds and from children aged 8-15. Since 2014 responses have been taken from children aged 8-11 and 12-15 rather than the parent.*

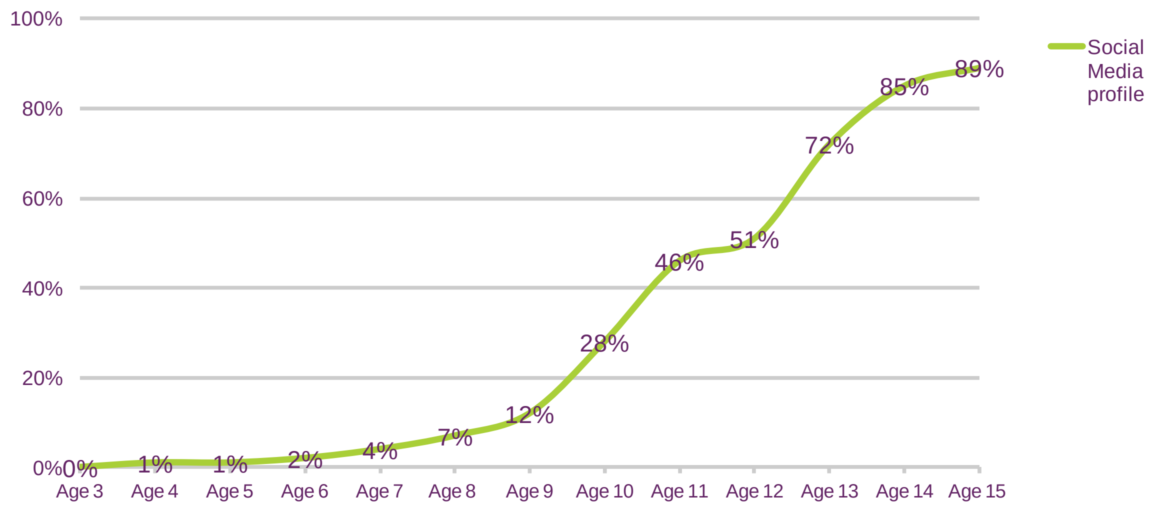
**Before 2017 this question was asked only about use of social media sites or apps, this definition was expanded in 2017 to include messaging sites or apps.*

Base: Parents whose child ever goes online aged 3-4 (354) or 5-15 (1255 aged 5-15, 317 aged 5-7, 463 aged 8-11, 475 aged 12-15). Significance testing shows any change between 2016 and 2017.

By age 12, half of all children have a social media profile

Figure 46 shows the incidence of having a social media profile among all children (as opposed to those who go online), broken out by the age of the child. By the age of 9, just over one in ten children (12%) have a social media profile; the incidence rises quickly so that by age 10, almost three in ten have a profile (28%) and close to half (46%) by age 11. From 12 (51%) onwards, half (or more) of children have a social media profile, with another steep increase, to 72%, at age 13. Nine in ten (89%) children aged 15 have a social media profile.

Figure 46: Incidence of having a social media profile, by age of child: 2017



QP43/ QC19 – I'd now like to ask you some questions about your child's use of social media or messaging sites or apps - websites or apps like Facebook, Twitter, Instagram, Tumblr, Snapchat, WhatsApp and some activities on YouTube. Does your child have a profile or account on any of these types of sites or apps? (prompted responses, single coded). Responses from parents for 3-7 year-olds and from children aged 8-15.*

Base: Parents of children aged 3-4 or 5-15 (351 aged 3, 326 aged 4, 169 aged 5, 129 aged 6, 114 aged 7, 175 aged 8, 123 aged 9, 102 aged 10, 97 aged 11, 162 aged 12, 101 aged 13, 108 aged 14, 108 aged 15).

Facebook continues to be the most used social media site or app for 12-15s, although this is less likely compared to last year

Parents of children aged 3-7 and children aged 8-15 with a social media profile were asked to say which social media sites or apps their child/ they used. Although many social media sites have a minimum age of 13 or older, many are still used by younger children[50].

Figure 47 shows the social media sites or apps used by children aged 12-15[51] with a social media account. As shown, three quarters of 12-15s with a social media profile use Facebook[52] (74%); still the most used social media site or app among 12-15s, but showing a decline compared to 2016 (from 82%).

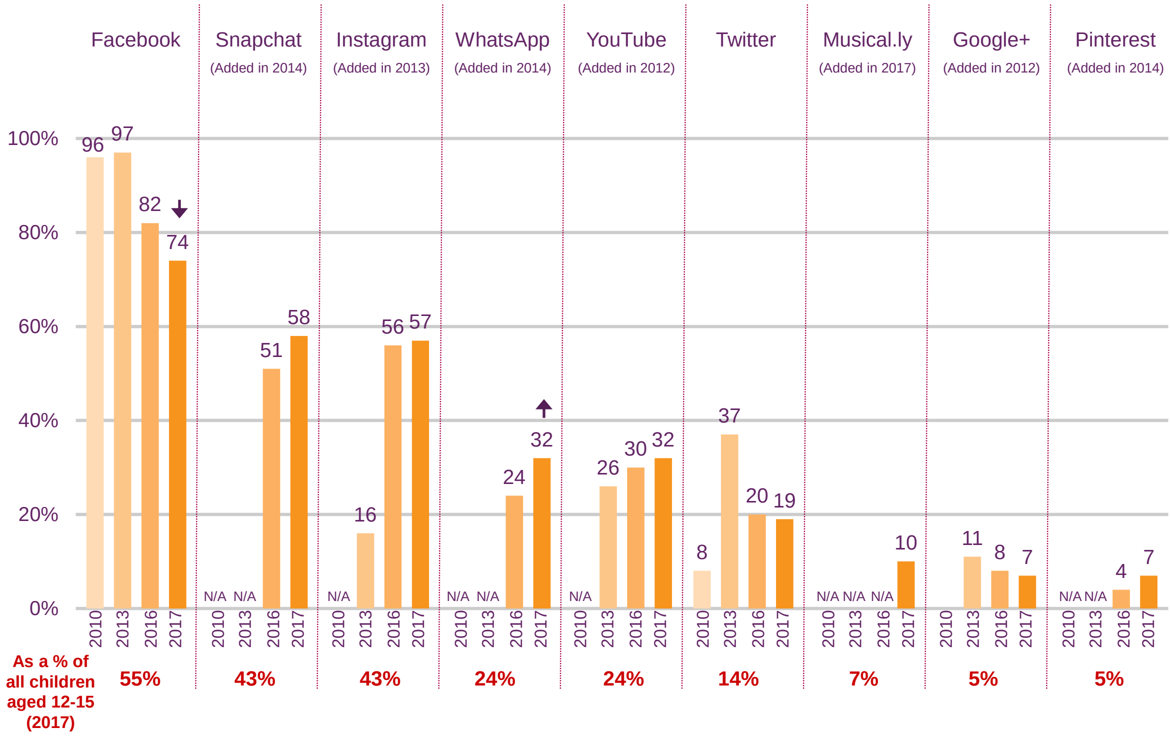
A majority of 12-15s with a social media profile use Snapchat (58%) or Instagram (57%), as in 2016, with an increase to one-third using WhatsApp (32% vs. 24% in 2016).

[50] The minimum age for having a profile on Facebook, Instagram, Snapchat, WhatsApp, YouTube, Twitter and Google+ is 13. See https://www.net-aware.org.uk/networks/?order=-popularity

[51] There are too few social media users aged 3-4, 5-7 or 8-11 to look at the sites or apps used in more detail.

[52] In 2016 and 2017, Facebook Messenger (both 28%) was recorded separately to Facebook (80% in 2016, 73% in 2017) with the results combined to get an overall incidence for those 12-15s with a profile on Facebook (82% in 2016 and 74% in 2017).

Figure 47: Social media sites or apps used by children aged 12-15: 2010, 2013, 2016 and 2017



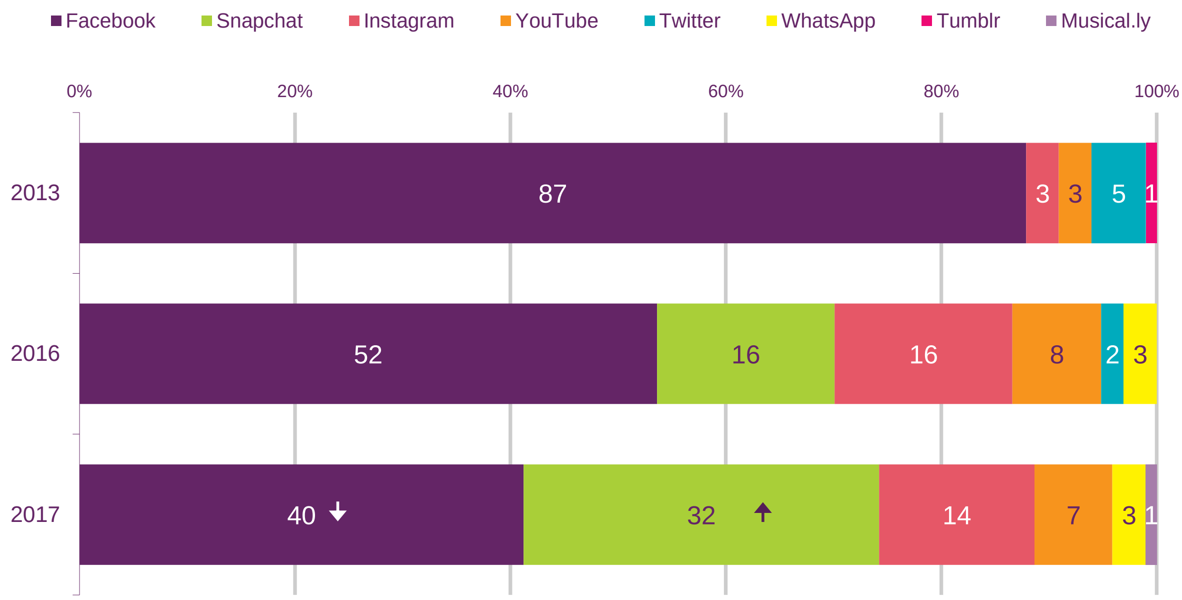
QP44/ QC20 – Which social media sites or messaging sites or apps do you use? (unprompted responses, multi coded) - showing responses of more than 2% of children aged 12-15 using any social media or messaging sites or apps. *Before 2017 this question was asked only about use of social media sites or apps, this definition was expanded in 2017 to include messaging sites or apps.*

Base: Children aged 12-15 who have a social media or messaging site app profile (343). Significance testing shows any change between 2016 and 2017.

Twice as many 12-15s name Snapchat as their main social media site or app as in 2016

As shown in Figure 48, in 2017 no single social media site or app is named as the main site or app by a majority of 12-15s with a social media profile. In previous years, Facebook had been named as the main site or app by a majority of 12-15s with a profile, but nominations are lower in 2017 than in 2016 (40% vs. 52%). By contrast, nominations for Snapchat as the main social media site or app have doubled - from 16% in 2016 to 32% in 2017. Instagram (14%) is the only other site or app named by more than one in ten 12-15s with a social media profile.

Figure 48: Main social media sites or apps used by children aged 12-15: 2013, 2016 and 2017



*QP45/ QC21 – And which is your main social media or messaging site or app, the one you use most often? (unprompted responses, multi coded). Responses from children aged 12-15. *Before 2017 this question was asked only about use of social media sites or apps, this definition was expanded in 2017 to include messaging sites or apps.*

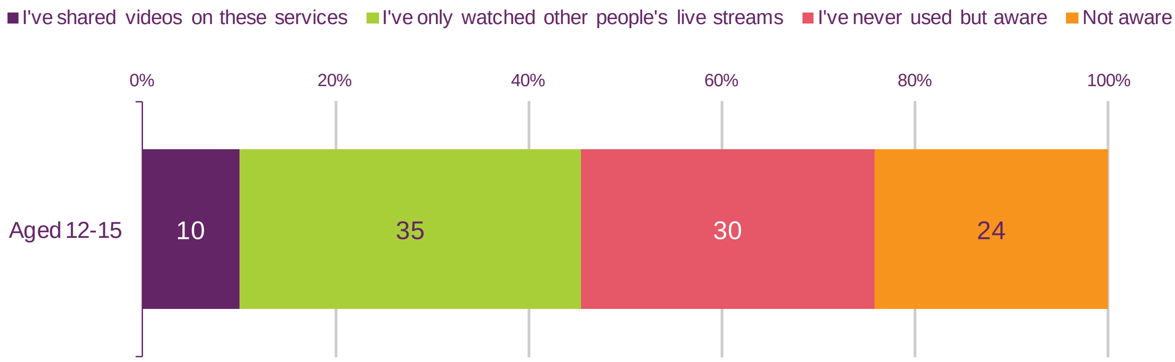
Base: Children aged 12-15 who have a social media or messaging site app profile (343). Significance testing shows any change between 2016 and 2017.

One in ten 12-15s has 'gone live' by sharing their own live-streamed videos

For the first time in 2017 we asked 12-15 year-olds who go online some questions about live streaming services[53] such as Facebook Live, YouTube Live and Instagram Live. Those who had heard of live streaming were asked if they had actively shared videos themselves, watched other people's live streams, or done neither of these.

As shown in Figure 49, three-quarters (76%) of 12-15s who go online are aware of live streaming, with one in ten (10%) having experience of sharing videos using live streaming. One-third (35%) have not posted content but have watched other people's live streams. So among those who are aware of live streaming, more than half have watched or shared live videos through a live streaming service.

Figure 49: Awareness and use of live streaming services among 12-15s who go online: 2017



QC24A - I'd now like to ask you a question about live streaming. This allows you to 'go live' by sharing live videos with others using services like Facebook Live, YouTube Live or Instagram Live. Before today, had you heard about live streaming? (unprompted responses, single coded). / QC42B - Which one of these best describes your experience of live streaming services? (prompted responses, single coded).

Base: Children aged 12-15 who go online (475).

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[53] The question to establish awareness asked "I'd now like to ask you a question about live streaming. This allows you to 'go live' by sharing live videos with others using services like Facebook Live, YouTube Live or Instagram Live. Before today, had you heard about live streaming?"

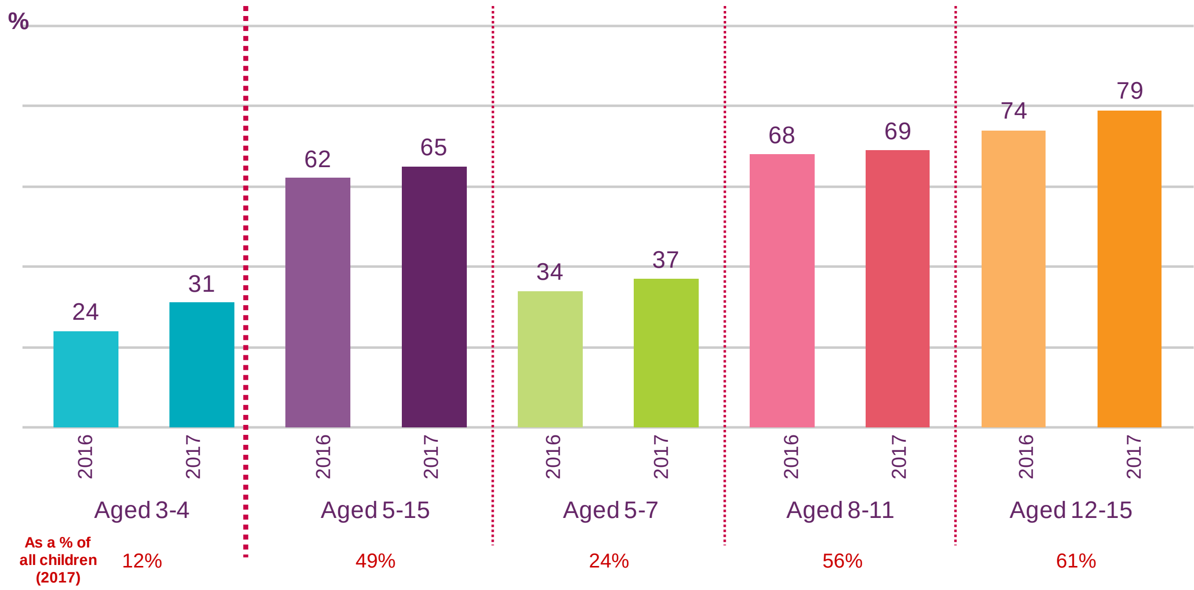
Playing games online

One in ten of all 3-4s and half of all 5-15s play games online

Parents of children aged 3-7 and children aged 8-15 who used any devices for gaming (reported in Figure 25 and Figure 26) were prompted with a description of online gaming[54] and were asked if their child/ they ever played online games. Figure 50 shows the incidence of online gaming across the different age groups in 2016 and 2017.

Among those who play games, nearly one-third (31%) of 3-4s and two-thirds (65%) of 5-15s ever play games online (equivalent to 12% of all 3-4s and 49% of all 5-15s). The incidence of online gaming is higher among 8-11s (69%) and 12-15s (79%) who play games than among 5-7s (37%) and 3-4s (31%). Each of these incidences is unchanged compared to 2016.

Figure 50: Incidence of online gaming, by age: 2016 and 2017



QP70/ QC42 – Many games can now be played online, either through games consoles, other games players or through other things like computers, laptops, tablets, mobile phones and smart TVs. Examples of popular games that can be played online include FIFA football games, Minecraft, Club Penguin, Animal Jam and Moshi Monsters. Do you ever play online games? IF YES: When you play online games, which of these describe how they are playing? (prompted response, multi -coded) . Responses from parent for 3-7s and from child aged 8-15

Base: Parents of children aged 3-7 whose child plays games and children aged 8-15 who ever play games (264 aged 3-4, 1028 aged 5-15,266 aged 5-7, 393 aged 8-11, 369 aged 12-15). Significance testing shows any change between 2016 and 2017.

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[54] Many games can now be played online, either through games consoles, other games players or through computers, laptops, tablets, mobile phones and smart TVs. Examples of popular games that can be played online include FIFA football games, Minecraft, Club Penguin, Animal Jam and Moshi Monsters.

One in ten of all 8-11s and two in ten 12-15s play games against people they have not met in person

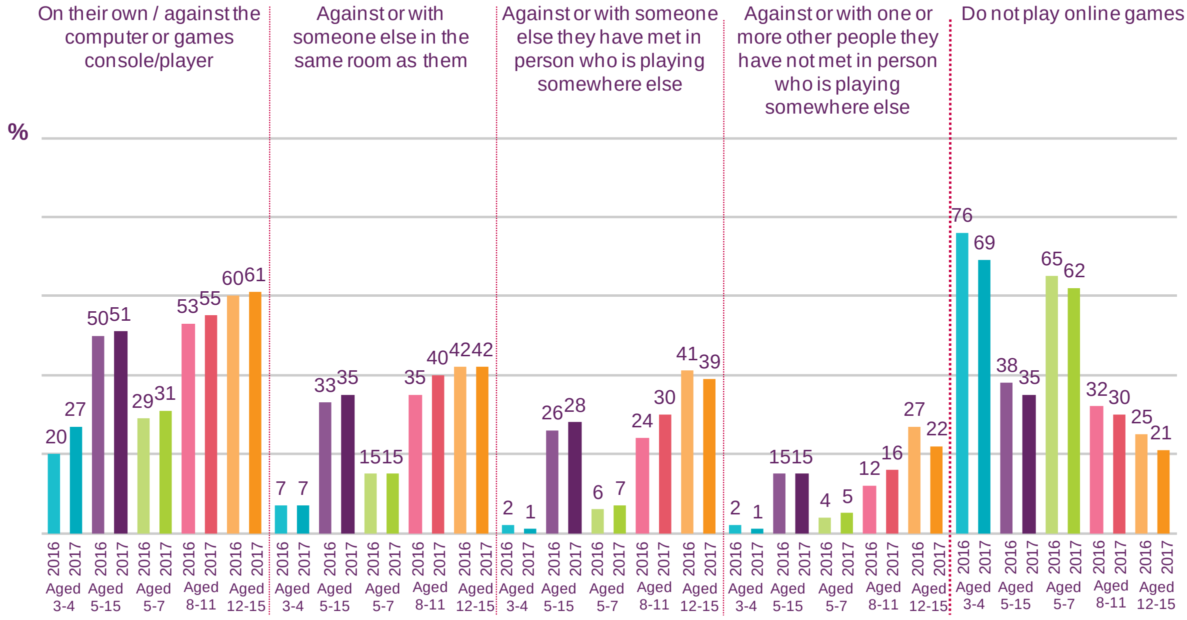
To get a sense of whom children are playing online games with, and whether this includes playing against strangers, we asked parents of younger children and older children themselves about a range of different ways of online gaming (Figure 51). The question asked whether they: play games on their own against the computer or games player; play against, or with, someone else in the same room; play against, or with, someone else they have met in person who is playing somewhere else; or play against one or more people they have not met in person who are playing somewhere else.

As shown in Figure 51, children in each age group who play online games are most likely to play on their own against the computer or games player, accounting for 51% of 5-15s who play games and 27% of 3-4s who play games.

Few children aged 3-4 or 5-7 who play games play online with or against someone else in the same room, or someone else they know who is playing somewhere else. This incidence is higher among older children but still accounts for less than half of online games players: at least three in ten 8-11s who play games and about four in ten 12-15s play games in these ways.

Looking specifically at playing online with or against one or more people the children have not met in person, who are playing somewhere else, this type of online gaming is ever undertaken by one in six 8-11s (16%) and one in five 12-15s (22%) who play games at all. When this is re-based to report on all children, as opposed to those who play games, it represents 13% of all 8-11s and 17% of all 12-15s. There has been no change any measure related to online gaming compared to 2016 for any age group of child.

Figure 51: Types of online gaming undertaken by children at home or elsewhere, by age: 2016 and 2017



QP70/ QC42 – Many games can now be played online, either through games consoles, other games players or through other things like computers, laptops, tablets, mobile phones and smart TVs. Examples of popular games that can be played online include FIFA football games, Minecraft, Club Penguin, Animal Jam and Moshi Monsters. Do you ever play online games? IF YES: When you play online games, which of these describe how they are playing? (prompted response, multi -coded). Responses from parent for 3-7s and from child aged 8-15

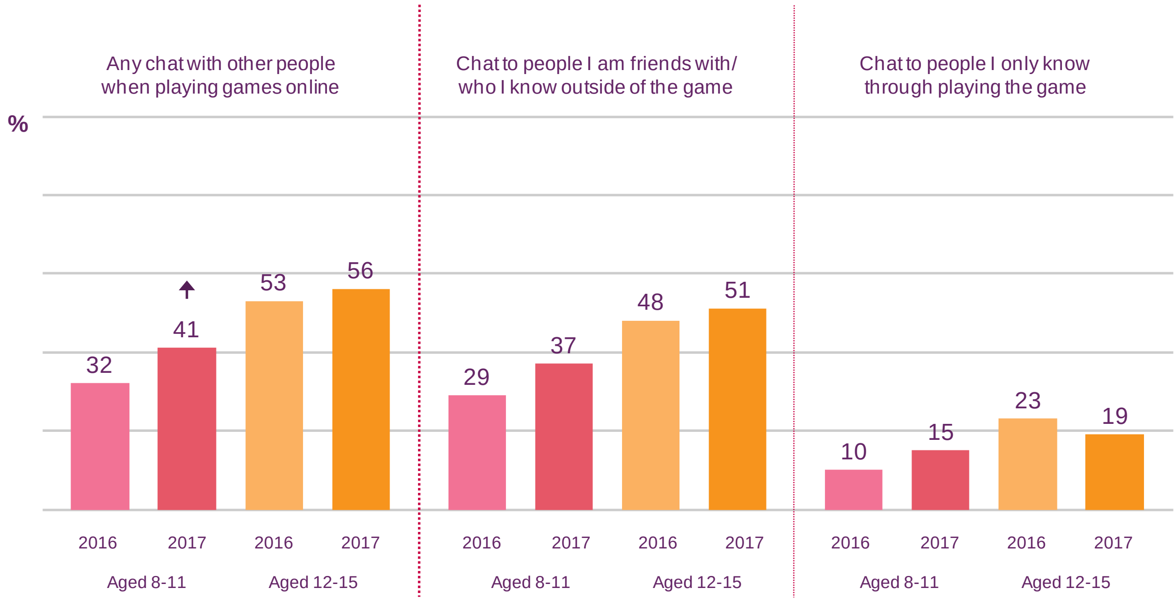
Base: Parents of children aged 3-7 whose child plays games and children aged 8-15 who ever play games (264 aged 3-4, 1028 aged 5-15,266 aged 5-7, 393 aged 8-11, 369 aged 12-15). Significance testing shows any change between 2016 and 2017.

A quarter of online games players aged 12-15 chat through the game to players they don't know

Children aged 8-11 and 12-15 who ever play games online (56% of 8-11s and 61% of 12-15s) were asked about their use of chat features when playing games online. As shown in Figure 52, online games players are more than twice as likely to chat through the game to people they already know outside the game (37% 8-11s, 51% 12-15s) than they are to chat to people they know only through playing the game (15% 8-11s, 19% 12-15s).

The incidence of using any chat features has increased since 2016 for 8-11s (41% vs. 32%), with no overall change for 12-15s.

Figure 52: Use of chat features when playing games online: 2016 and 2017



QC43/ QC44 – When you play games online do you ever chat via the game to other people who are playing, through instant messaging or using a headset? (unprompted responses, single coded)/ And when you chat who do you chat with? (prompted responses, multi coded)

Base: Children aged 8-15 who ever play games online (266 aged 8-11, 288 aged 12-15). Significance testing shows any change between 2016 and 2017.

Differences by gender and socio-economic group

Boys are more likely than girls to play games online and to chat online with people they don't know outside the game

Girls aged 12-15 are more likely than boys to have a profile on Musical.ly (15% vs. 4%), but take-up of other social media or messaging sites or apps does not differ to any significant extent in 2017.

Girls aged 12-15 are more likely to consider Snapchat to be their main profile (39% vs. 24%) while boys aged 12-15 are more likely to consider YouTube to be their main profile (10% vs. 4%). Girls aged 12-15 are more likely than boys to have experience of sharing videos using live streaming services (14% vs. 7%).

Among those who play games, boys aged 8-11 (78% vs. 57%) and 12-15 (88% vs. 64%) are more likely than girls to say they play online games, and boys aged 8-11 (22% vs. 7%) and 12-15 (30% vs. 9%) who game are more likely than girls to say they play against people they don't know. Boys aged 12-15 who game online (23%) are more likely than girls (11%) to use the chat features to chat with people they only know through gaming with them.

Facebook is more likely to be used by those in DE households, while those in AB households are more likely to have a profile on YouTube

Children aged 5-15 in DE socio-economic group households who have a social media profile are more likely to have a profile on Facebook compared to all 5-15s with a profile (75% vs. 65%). Children in AB households are more likely to have a profile on YouTube (46% vs. 33%).

There are no differences in any of the measures for online gaming by household socio-economic group in 2017.

10. News consumption, creative and civic activities

This section reports on some of the findings from a survey conducted online with 12-15 year-olds, exploring their interest in news generally, in different types of news content, and the types of news sources used.

It also looks at data from the main face-to-face study on the extent of civic participation online among 8-15 year-olds, the use of BBC sources for education purposes among 3-4s and 5-15s, and concludes by looking at the creative activities undertaken online by 3-15 year-olds.

Key findings

- Half (49%) of 12-15s say they are at all interested in 'reading, watching, listening to or following news', with just one in ten (8%) very interested.
- However, interest in news rises to almost all (96%) 12-15s once they are asked to choose from a list of 11 types of news, on topics including music, celebrities, sports and 'serious things going on in the UK'.
- Four in ten (37%) 12-15s say that they actively look for news, rather than just coming across it, and a similar proportion (41%) say they either look for, or get, updates about any type of news they are interested in more often than weekly.
- The most popular sources of news among 12-15s who are interested in any type of news are TV (64%), social media (56%) and friends or family (48%). Around one in five say they read paper copies of newspapers (17%) or magazines (14%) for news.
- Apart from editing photos, making pictures or making videos, relatively few children say they have done any of the other online creative activities that we asked about.
- Online civic participation (signing petitions, sharing news stories on social media, or writing written comments or talking online about the news) is evident among a quarter (26%) of 12-15s and one in 20 (4%) 8-11s.
- CBeebies is used by eight in ten (79%) 3-4 year-olds, and nine in ten (89%) parents of CBeebies users rate these resources as being educational.
- BBC websites or apps for schoolwork or homework are used by four in ten (41%) 5-7s, six in ten (58%) 8-11s and seven in ten (70%) 12-15s. Around nine in ten users (or their parents) (86% to 89%) agree that these resources are helpful.

Differences by gender

- Overall interest in news, actively looking for news, and the frequency of getting news updates does not differ between boys and girls aged 12-15. The news sources used also do not differ by gender in almost all cases.
- Interest in some specific types of news does differ, however, with higher interest among girls for news about music, celebrities and fashion or beauty, and higher interest among boys for news about sports, science and technology and 'serious things going on in other countries'.

- Some specific creative activities are more likely to be undertaken by girls or by boys, but there is no overall difference in ever undertaking any creative activity online.

Differences by household socio-economic group

- Children aged 12-15 in ABC1 households are more likely than those in C2DE households to say they are interested in news (54% vs. 44%), to say they actively look for news (43% vs. 30%) and to look for news updates at least once a week (78% vs. 61%).
- However, when prompted with a list of 11 types of news, the overall level of interest in any does not vary by socio-economic group and neither do the sources used for news.
- Undertaking any creative activities online is higher than the average among children aged 5-15 in AB households (73% vs. 65%).
- Parents of CBeebies users aged 3-4 in ABC1 households are more likely than those in C2DE households to say these resources are educational (94% vs. 85%).
- The use of BBC websites or apps for schoolwork or homework is less likely than the average in DE households for 5-7s, 8-11s and 12-15s. But among users, finding these resources helpful does not vary by socio-economic group.

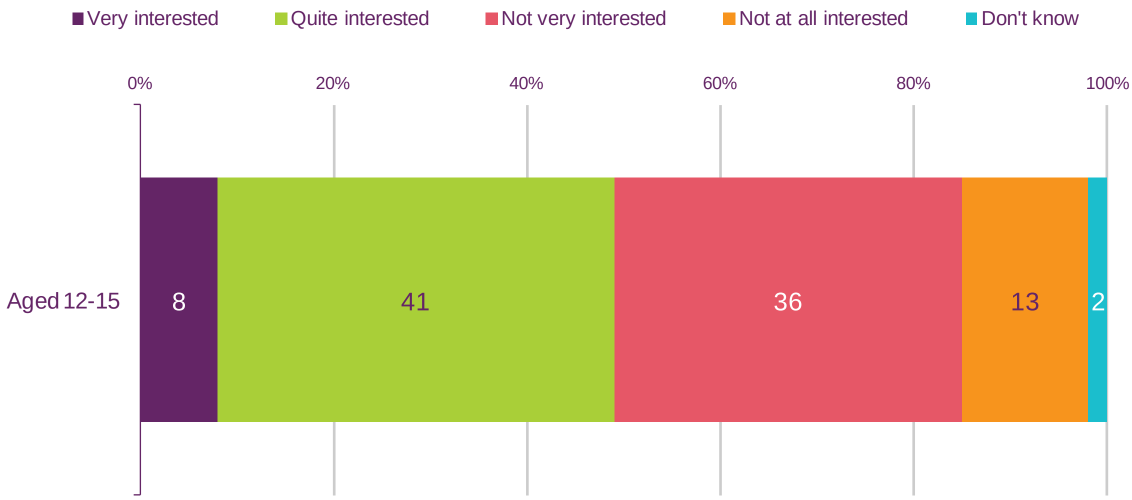
News consumption

Although just half of 12-15s say they are interested in 'news', when prompted with a list almost all are interested in any of the 11 types of news shown

As detailed earlier in Section 3, a separate survey was conducted online with children aged 12-15. The online survey covered interest in, and consumption of, news.

Children aged 12-15 who were interviewed through the online survey were asked to say how interested they are in 'reading, watching, listening to or following news'. As shown in Figure 53, equal proportions of 12-15s interviewed online said that they were interested (49%) or not interested (49%) in news. Less than one in ten (8%) were 'very interested', and most of those with any degree of interest were 'quite interested' (41% of all respondents).

Figure 53: Interest in news among 12-15s who go online: 2017



Source: Online survey with children aged 12-15

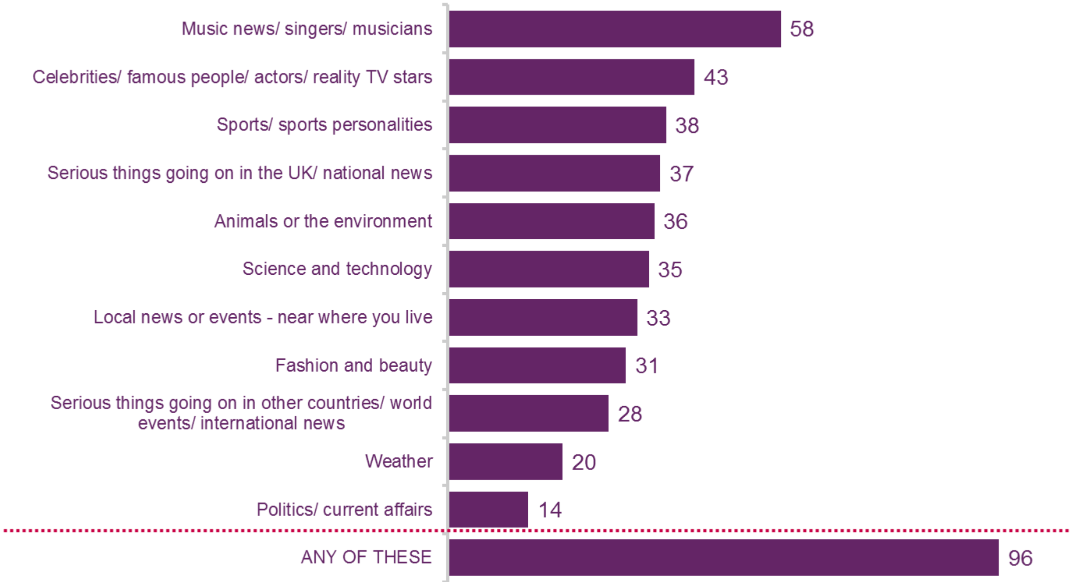
Q19 - How interested are you in reading, watching, listening to or following news? Would you say you are... (prompted responses, single coded).

Base: Children aged 12-15 who go online (500).

All children aged 12-15 interviewed through the online survey were then shown a randomised list of 11 types of news and were asked to say which, if any, they were interested in. As shown in Figure 54, most 12-15s are interested in music news (58%), while around four in ten are interested in news about celebrities (43%), sports (38%), serious things going on in the UK (37%), or animals/ the environment (36%). Around three in ten are interested in science and technology (35%), local news (33%), fashion and beauty (31%) or serious things going on in other countries (28%). Two in ten or less are interested in news about weather (20%) or politics/ current affairs (14%).

Once shown the 11 types of news, almost all (96%) 12-15s state any interest in any of the types. Given that just half (49%) said they were interested in 'reading, watching, listening to or following news', it is apparent that 12-15s do not associate the umbrella term 'news' with all the types of news subsequently presented for them to choose from.

Figure 54: Interest in types of news content among 12-15s who go online: 2017



Source: Online survey with children aged 12-15

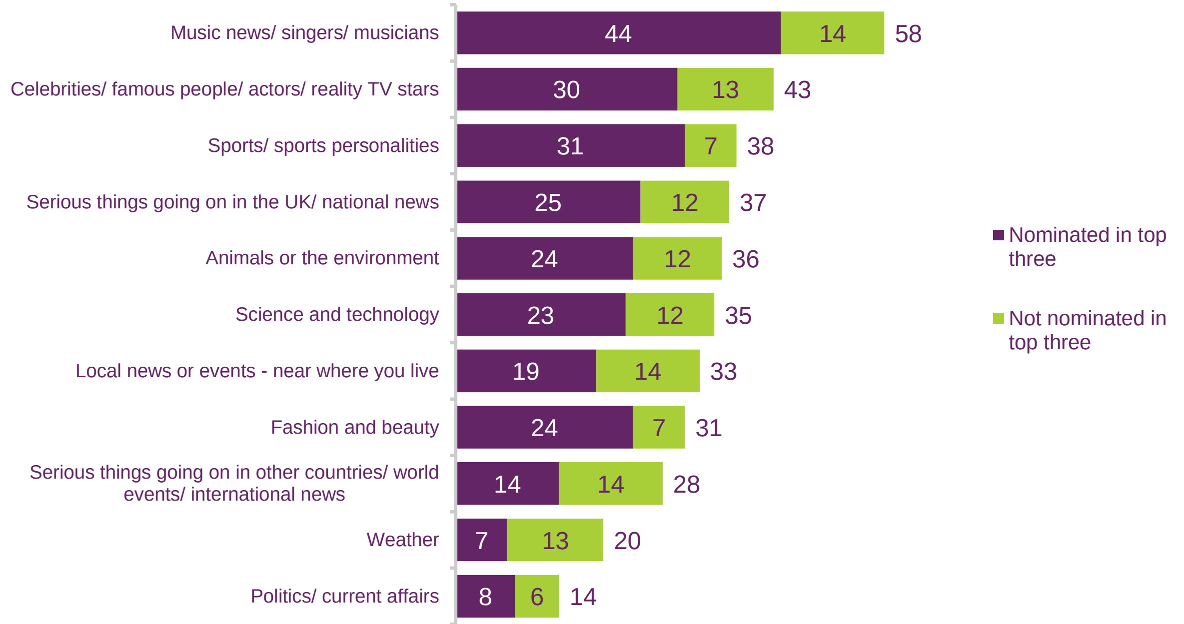
Q20A - Here are some different types of news. Which, if any, of these are you interested in? (prompted responses, single coded).

Base: Children aged 12-15 who go online (500).

Of the types of news the children said they were interested in, the online survey then asked 12-15s to select the three they were most interested in. In Figure 55 below, the overall level of interest for each type of news shown in Figure 54 is subdivided to show the proportion of all 12-15s nominating that type of news as being in their top three.

Three types of news have a higher-than-average share of top-three nominations, among the 12-15s who are interested: sports/ sports personalities (31% top three, 38% interested overall), fashion and beauty (24% top three, 31% interested overall) and music news/ singers/ musicians (44% top three, 58% interested overall).

Figure 55: Interest in types of news content among 12-15s who go online: top three nominations: 2017



Source: Online survey with children aged 12-15

Q20B - And which of these are the three that you are most interested in? (prompted responses, single coded).

Base: Children aged 12-15 who go online (500).

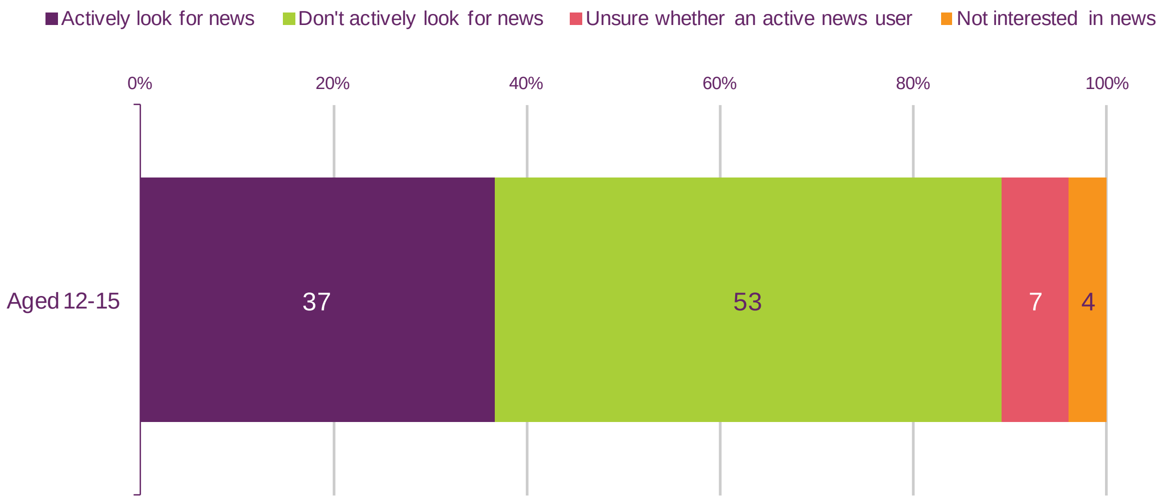
Four in ten 12-15s say they actively look for news rather than just coming across it

To understand the extent to which 12-15s actively look for news rather than just coming across it, the online survey distinguished[55] between passive and active interest in news, asking the 12-15s whether they actively look for news. This question was asked at a general level rather than being specific to each of the types of news that were of interest to the respondent. Figure 56 reports the findings based on all 12-15 year-olds; because of this, the 4% of 12-15s who are not interested in news, when prompted with the list of types, are also shown.

Across all 12-15s, as shown in Figure 56, four in ten (37%) say they actively look for news, while half (53%) say they don't actively look.

[55] "Sometimes you might find out about the news because people around you are watching, listening or talking about it or because you come across it online. Sometimes you might actively want to look for it, for instance by: watching news on TV, listening to it on the radio or reading the paper, going online to news websites or apps, signing up to news alerts or reading news stories or updates on social media."

Figure 56: Whether child aged 12-15 actively looks for news content: 2017



Source: Online survey with children aged 12-15

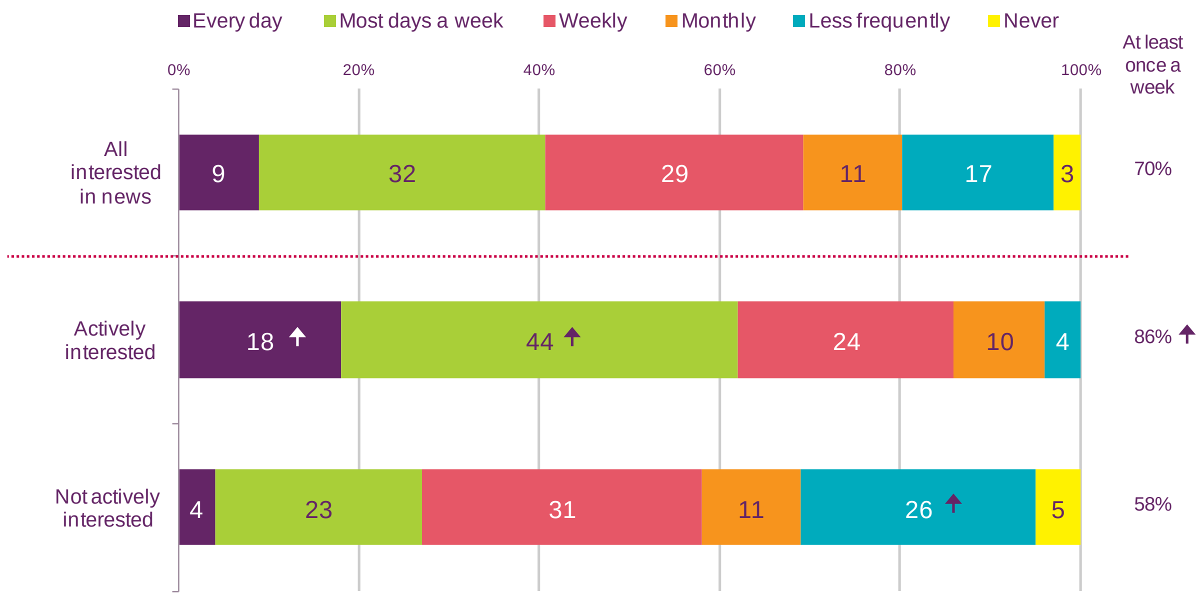
Q21 "Sometimes you might find out about the news because people around you are watching, listening or talking about it or because you come across it online. Sometimes you might actively want to look for it, for instance by: watching news on TV, listening to it on the radio or reading the paper, going online to news websites or apps, signing up to news alerts or reading news stories or updates on social media. Do you actively look for news?" (prompted responses, single coded).

Base: Children aged 12-15 who go online (500).

Those interested in any type of news were asked to think (at a general level) about the different types of interest to them, and to say how often they looked for information, or received updates about any of these types. Figure 57 shows responses from those interested in any type of news, with further detail below the dotted line about those 12-15s who said they actively looked for news and those who do not.

Across all 12-15s who are interested in any type of news, one in ten (9%) look for information or get updates every day and around three in ten do so most days a week (32%) or weekly (29%). In total, 70% of those interested in any types of news get news updates at least once a week. As might be expected, those who say they actively look for news (see Figure 56) get news updates more frequently; with two in ten (18%) looking for information or getting updates every day, around four in ten (44%) most days a week and one quarter weekly (24%). In total, 86% of those who actively look for news get news updates at least once a week. In contrast, six in ten (58%) of those with any interest in news who do not actively look for news say they get news updates at least once a week.

Figure 57: Frequency with which children interested in the news look for news or get news updates: 2017



Source: Online survey with children aged 12-15.

Q22 - Thinking about all the different types of news you said you are interested in, how often do you look for information or get the latest updates about any of these types of news? (prompted responses, single coded).

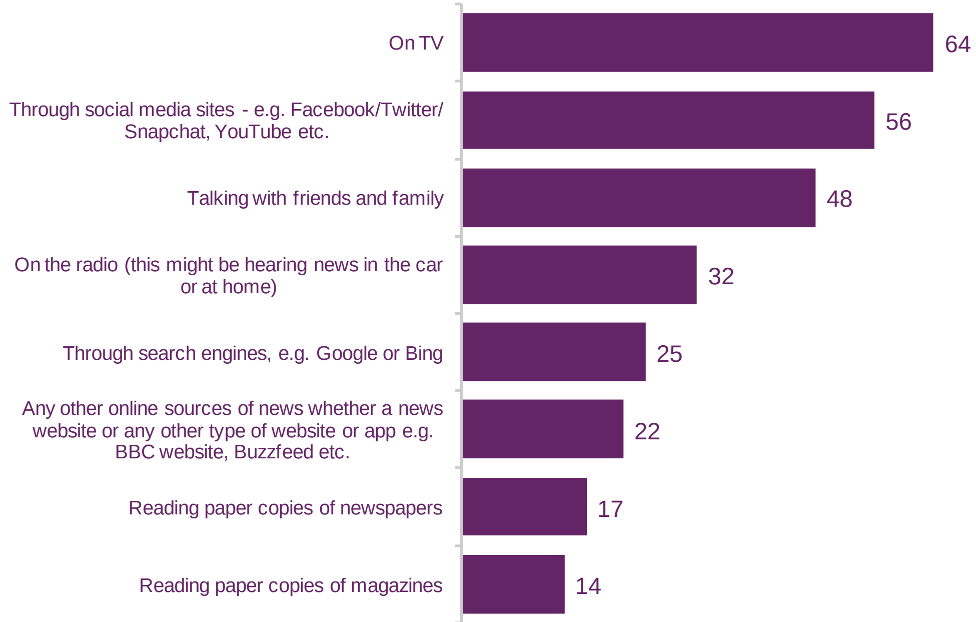
Base: Children aged 12-15 who go online and who say they are interested in any type of news (482).

The most popular sources of news for 12-15s are TV, social media and friends and family

Those interested in any type of news were shown a randomised list of seven news sources and were asked to say which they ever use. As shown in Figure 58, the most popular source of news/ news updates is TV (64%), followed by social media (56%), with half (48%) finding out through talking with their friends or family (48%). One-third (32%) use radio as a source of news, one quarter (25%) use search engines, with slightly fewer (22%) using any other online source of news. Fewer than one in five who are interested in any type of news say they read paper copies of newspapers (17%) or magazines (14%) for news updates.

While not shown in Figure 58, those who say they actively look for news are more likely than average to say they use the lesser-used news sources including search engines and other online sources, as well as paper copies of newspapers and magazines.

Figure 58: Sources of news updates used by 12-15s interested in any type of news: 2017



Source: Online survey with children aged 12-15.

Q23 - Here is a list of different ways you can find out about or get updates on news stories. Which of these ways do you ever use? (prompted responses, multi-coded).

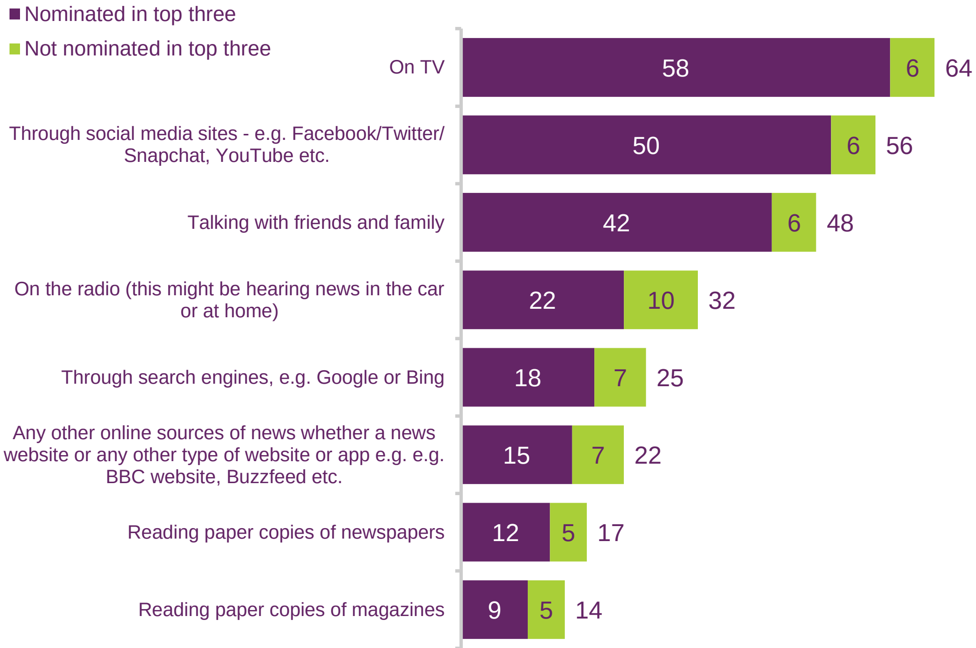
Base: Children aged 12-15 who go online who say they are interested in any type of news (482).

In addition to asking which news sources they use, the online survey asked 12-15s to select their top three most used news sources. In Figure 59 below the overall level of use for each type of news source shown in Figure 58 is sub-divided to show the proportion of all 12-15s nominating that news source as being in their top three most used.

Broadly nine in ten of those who use TV, social media or friends and family as a source of news nominate those sources as being in their top three most used.

While not shown in Figure 59, those who say they do not actively look for news are more likely than average to name social media as one of their most used news sources.

Figure 59: Sources of news updates used by 12-15s interested in any type of news: top three nominations: 2017



Source: Online survey with children aged 12-15.

Q24 - And which of these are the three you use most to get updates on news stories? (prompted responses, multi-coded).

Base: Children aged 12-15 who go online who say they are interested in any type of news (482).

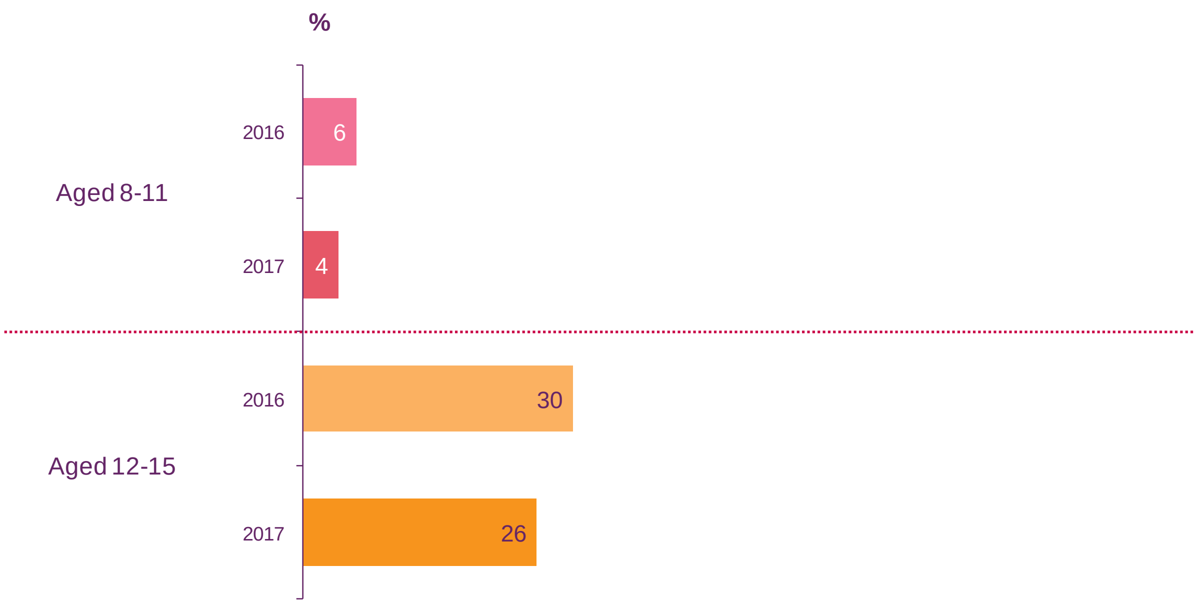
Civic participation

A quarter of internet users aged 12-15 have engaged in civic activities online

In order to better understand the extent to which internet users aged 8-15 ever get involved with civic activities online, we asked them: "When you go online do you ever do things like sign petitions, share news stories on sites like Facebook or Twitter or write comments or talk online about the news?". This question was first asked in 2016, and Figure 60 shows the findings from both 2016 and 2017 for 8-11s and 12-15s who go online.

Four per cent of internet users aged 8-11 say they have ever undertaken one of these civic activities, unchanged since 2016. Engagement in civic activities online is more likely among 12-15s (26%), where the incidence is also unchanged since 2016.

Figure 60: Civic participation among internet users, by age: 2016 and 2017



QC14 – When you go online do you ever do things like sign petitions, share news stories on sites like Facebook or Twitter or write comments or talk online about the news? (unprompted responses, single coded).

Base: Children aged 8-15 who go online (463 aged 8-11, 475 aged 12-15).

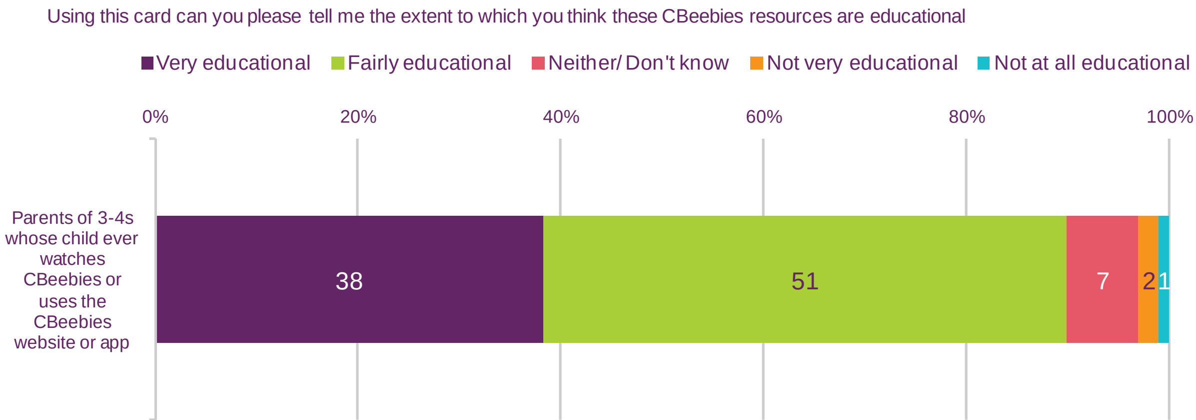
Use of BBC educational resources

Nine in ten parents of 3-4 year-olds who use CBeebies say the resources are educational

In 2017, questions were added to understand whether children use BBC resources and the extent to which they or their parents consider these resources to be educational or helpful.

Eight in ten (79%) parents of children aged 3-4 say their child ever watches CBeebies or uses the CBeebies website or app. Among parents of users, nine in ten (89%) rate the CBeebies resources as educational, with four in ten (38%) saying 'very educational'. As shown in Figure 61, very few (3%) parents of CBeebies users rate the CBeebies resources as not very or not at all educational.

Figure 61: Attitudes towards CBeebies among parents of 3-4s who watch CBeebies TV, website or app: 2017



QP55A – Does your child ever watch CBeebies or use the CBeebies app or website? (unprompted responses, single coded)/ QP56A - Using this card can you please tell me the extent to which you think these CBeebies resources are educational? (prompted responses, single coded).

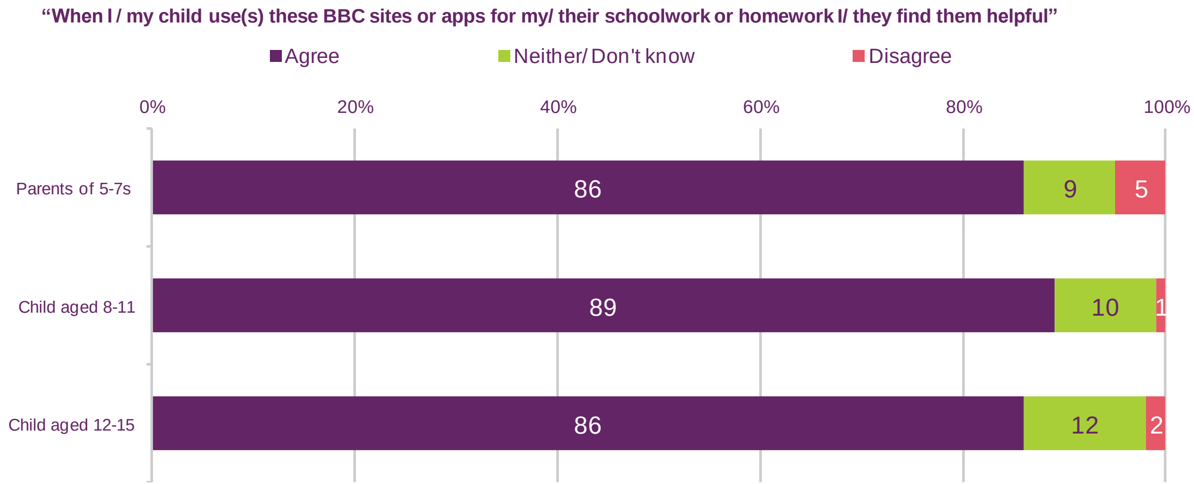
Base: Parents of children aged 3-4 (677)/ Parents of children aged 3-4 whose child ever watches CBeebies or use the CBeebies app or website (534).

BBC websites and apps for schoolwork or homework are rated as helpful by around nine in ten parents of 5-7s and users aged 8-15

Use of BBC websites, or apps such as Bitesize, for schoolwork or homework increases with the age of the child among 5-15s: from four in ten (41%) for 5-7s, to six in ten (58%) for 8-11s and seven in ten (70%) for 12-15s.

Around nine in ten users agree these BBC resources are helpful, with similar responses across parents of users aged 5-7 (86%), users aged 8-11 (89%) and users aged 12-15 (86%). As shown in Figure 62, very few disagree that the BBC websites or apps are helpful; accounting for one in twenty (5%) parents of users aged 5-7 and fewer users aged 8-11 (1%) or 12-15 (2%).

Figure 62: Whether BBC websites or apps for schoolwork and homework are helpful: 2017



QP55B – Does your child ever use BBC websites or apps for their schoolwork or homework, so sites or apps like BBC Bitesize? (unprompted responses, single coded)/ QP56B – To what extent do you agree with the following statement about their use of BBC sites or apps like BBC Bitesize? “When my child uses these BBC sites or apps for their schoolwork or homework they find them helpful” (prompted responses, single coded).

QC39A - Do you ever use BBC websites or apps for your schoolwork or homework, so sites or apps like BBC Bitesize? (unprompted responses, single coded)/ QC39B – Please say which of these options applies to you: “When I use these BBC websites or apps for my schoolwork or homework I find them helpful“ (prompted responses, single coded).

Base: Parents of children aged 5-7 whose child goes online (317)/ Parents of children aged 5-7 whose child goes online and who ever use the BBC websites or apps (like BBC Bitesize) for their schoolwork or homework (126)/ Children aged 8-15 who go online (463 aged 8-11, 475 aged 12-15)/ Children aged 8-15 who ever use BBC websites or apps (like BBC Bitesize) for their schoolwork or homework (263 aged 8-11, 336 aged 12-15).

Online creative activities undertaken by children

Editing or changing photos, and making drawings or pictures, are the two most likely online creative activities among 5-15s

Parents of children aged 3-7 and children aged 8-15 who go online were prompted with 14 creative activities and asked which, if any, their child/ they had ever done using any type of internet-enabled device.[56]

Figure 63 shows that no single creative activity from the list provided is undertaken by a majority of 3-4s or 5-15s overall, as was also the case in 2016. The likelihood of undertaking any of the 14 activities increases with the age of the child, ranging from about three in ten 3-4s who go online (29%) to around seven in ten 12-15s (73%).

The most popular creative activity undertaken by 3-4s is making or drawing a picture (27%), while 5-15s are as likely to do this (39%) as to have changed or edited a photo (40%). One-third of 5-15s have made a video (33%). Unlike children in younger age groups, the most popular creative activity undertaken by those aged 12-15 is changing or editing a photo (55%).

A small number of creative activities have declined since 2016, with one increase (the number of 8-11s who have changed or edited someone else's music), indicated by the downward and upward arrows in Figure 63.

[56] Defined as computers, tablets or mobile phones

Figure 63: Online creative activities ever undertaken, by age: 2017

All who go online	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Base	354	1255	317	463	475
Change or edit a photo	8%	40%	21%	36%	55%
Make a drawing or picture	27%	39%	40%	43%	35%
Make a video	9%	33%	25%	33%	38%
Make a character or avatar that lives an plays in games or sites like Moshi Monsters, Minecraft	2%	14%↓	6%	18%	16%
Make their own music	2%	10%	4%	9%	15%
Make an animation, moving picture or image	1%	10%	2%↓	12%	12%
Make a meme or gif (an image, video or piece of text that is funny that gets spread around online)	0%	7%	2%	7%	11%
Make an app or game	1%	6%	2%	6%	8%
Change or edit somebody else's music (such as cutting, editing or mixing tracks)	0%	5%	1%	4%↑	9%
Make a website	0%	5%	0%	2%	11%
Write a blog	0%	5% ↓	0%	5%	8%
Make a vlog	0%	4%	1%	5%	5%
Modify or change a game	0% ↓	4%	2%	3%	7%
Make or design a robot	1%	4%	3%	4%	4%
ANY OF THESE	29%↓	65%	50%	67%	73%

QP54/ QC13 Thinking about the different devices that your child uses, for instance computers, tablets, or mobile phones, have they ever used these devices to do any of the following? This could include any time spent learning about this when they are at school. Responses from parents of 3-7 year olds and from children aged 8-15. Significance testing shows any change between 2016 and 2017.

Differences by gender and socio-economic group

There are several differences between boys and girls aged 12-15 in the types of news they're interested in

Girls aged 12-15 are more likely than boys to say they are interested in three of the 11 types of news we asked about: music news (66% vs. 50%), celebrity news (55% vs. 30%), and fashion and beauty (51% vs. 11%). Boys aged 12-15 are also more likely to say they are interested in three of the 11 types of news we asked about: sports (56% vs. 20%), science and technology (45% vs. 25%), and serious things going on in other countries (33% vs. 23%). The incidence of actively looking for news, and the frequency of getting news updates, does not differ by gender.

For the most part, the news sources used by boys and girls aged 12-15 do not differ, but boys are more likely than girls to say they read paper copies of newspapers (22% vs. 12%).

There are no differences between boys and girls relating to civic participation online, use of CBeebies or use of BBC educational resources such as Bitesize for homework or school work.

While there are no differences by gender in ever undertaking any of the creative activities online that we asked about, there are some differences for specific activities. Girls aged 8-11 are more likely than boys to have made a drawing or picture (48% vs. 37%). Boys aged 12-15 are more likely than girls to have made a character or avatar (20% vs. 11%) or to have modified or changed a game (11% vs. 3%), with this also more likely among boys aged 8-11 (5% vs. 1%). Boys in this age group are also more likely to have made or designed a robot (6% vs. 2%).

Children aged 12-15 in ABC1 households are more likely than those in C2DE households to say they are interested in news, to actively look for news and to do so more frequently

Children aged 12-15 in ABC1 households are more likely than those in C2DE households to say they are very interested in reading, watching, listening to or following news (13% vs. 4%) and also more likely to be interested at an overall level (54% vs. 44%). However, when prompted with 11 different types of news, interest in any of these does not differ by socio-economic group (both 96%). There are some differences for particular types of news; there is higher interest among ABC1s for news about sports (48% vs. 28%) and higher interest among C2DEs for local news (37% vs. 28%) and news about fashion and beauty (36% vs. 27%).

Children aged 12-15 in ABC1 households are more likely than those in C2DE households to say they actively look for news (43% vs. 30%) and those who are interested in news are more likely to say they look for news updates at least once a week (78% vs. 61%). The news sources used by those interested do not differ, however.

There are no differences among 8-15s across socio-economic groups relating to civic participation online.

The incidence of using CBeebies by 3-4s does not differ by socio-economic group, but parents of users in ABC1 households are more likely than parents of users in C2DE households to say these resources are educational (94% vs. 85%).

The use of BBC websites or apps such as BBC Bitesize for schoolwork or homework is less likely than the average in DE households, both for 5-7s (25% vs. 41%) and 8-15s (54% vs. 64%). However, agreement among users (or their parents) that these BBC websites or apps are helpful does not vary by socio-economic group.

In terms of creative activities online, compared to the average, children aged 5-15 in AB households are more likely to have ever made an animation (16% vs. 10%) while those in C2 (4%) or DE (6%) households are less likely. Children in AB households are also more likely to have made an app or game (9% vs. 6%) or to have ever undertaken any of the creative activities that we asked about (73% vs. 65%).

11. Knowledge and understanding of media – trust in online content and news

This section addresses the extent to which older children (aged 8-15) understand their media environment, with a particular focus on the content they engage with.

It explores the extent to which children visit websites that are new to them, and the ways in which they distinguish between different sources of online content as well as the ways in which they critically assess this content in terms of the extent to which it is truthful. Search engine users are also asked the extent to which they trust the results returned by Google.

It moves on to look at the judgements made about the trustworthiness of news sources used – with a particular focus on those using social media for this purpose. It concludes by assessing children's awareness and experience of fake news.

Key findings

- Children aged 8-11 (60%) are more likely than 12-15s (53%) to say that in a typical week they only use websites or apps that they've used before.
- Among those 12-15s who visit sites they have not used before (43% of all 12-15s who go online) – two in five (41%) say they would check the information on a number of websites if they were unsure whether they could trust it.
- Forty-three per cent of internet users aged 12-15 would turn to the BBC first for accurate and true information about serious things going on in the world, more than any for other source they were asked about, while YouTube is their preferred source for accurate and true information about creative activities (45%) and for fun things like hobbies and interests (38%).
- Few users of social media sites/ apps believe that all the information on these sites is true (6% for 8-11s and 2% for 12-15s). Considerably more users believe that all the information is true on websites for school/ homework (25% of 8-11s who use these sites and 23% of all 12-15s) and on news websites or apps (22% of 8-11s who use these sites and 10% of all 12-15s).
- A majority of 8-11s (52%) and 12-15s (62%) who use search engine websites are aware that some of the results returned by search engines can be trusted and some can't. But a quarter of users aged 8-11 (26%) and 12-15 (24%) believe that if a website is listed by a search engine it can be trusted. Each of these measures is unchanged since last year.
- Twelve per cent of internet users aged 12-15 who consider TV one of their top three sources for news say this content is always reported truthfully, a higher proportion than those who say this about social media (2%).
- Nine in ten (90%) 12-15s who use social media as a news source say they ever consider whether or not a story on social media is true. A minority (37%) say they 'always' or 'often' do this, although the majority (53%) only 'sometimes' do it.

- Close to three- quarters of 12-15s who go online say they are aware of the concept of fake news (73%) and two in five (39%) say they have ever seen something online or on social media that they thought was a 'fake news' story.

Differences by gender

- Girls aged 12-15 are more likely than boys to say that in a typical week they only use websites or apps they've used before (60% vs. 46%).
- Boys aged 8-11 who go online and use search engine websites or apps are twice as likely as girls to feel that the results returned by a Google search can be trusted (34% vs. 17%).

Differences by household socio-economic group

- Children aged 12-15 in ABC1 households who go online are more likely than those in C2DE households to say they have heard of fake news (81% vs. 64%) and more likely to say they have seen something online or on social media that they thought was fake news (46% vs. 31%).

Visiting new websites

Younger children are more likely than older children to stick with familiar sites or apps

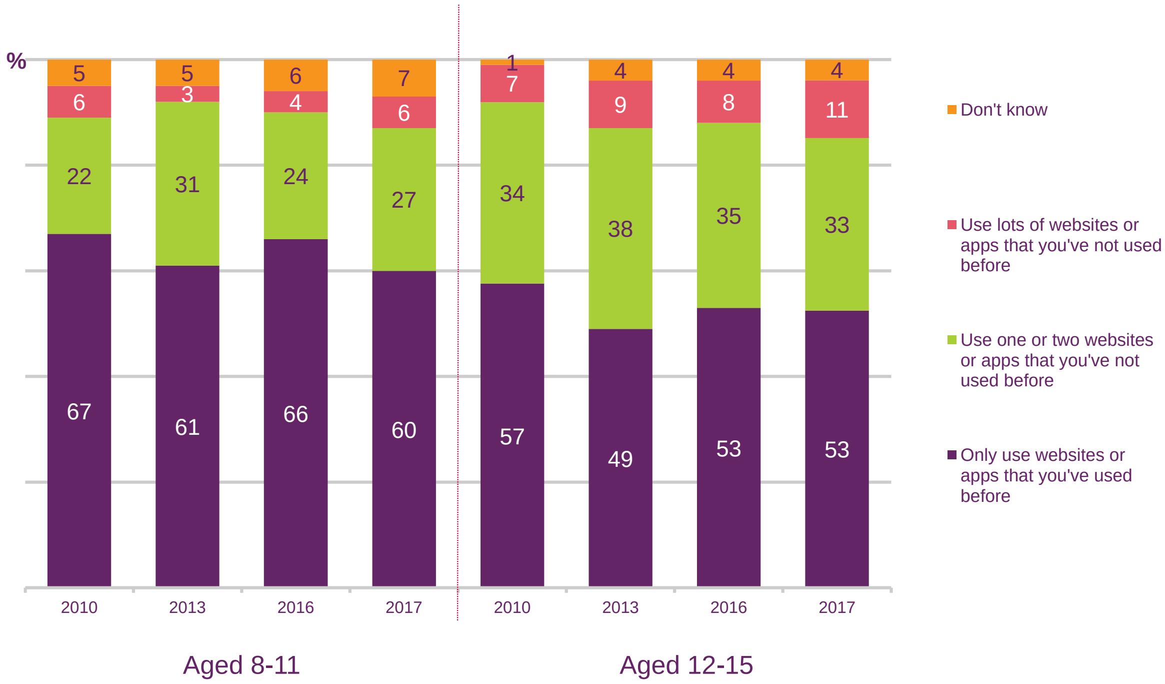
Before we look at children's critical understanding of, and ability to distinguish between, different forms of online content, it is worth addressing the extent to which children are discovering new things online through using lots of new websites or apps, or whether they tend to stick with familiar sites and apps.

Children aged 8-15 who go online were asked to say whether, in a normal week, they only used websites or apps they had used before, or used one or two websites that they hadn't used before, or used lots of websites or apps they hadn't used before.

As shown in Figure 64, three in five 8-11s (60%) say they only use websites or apps they have used before, more likely than among 12-15s (53%). Twelve to 15-year-olds are more likely than 8-11s to say they use lots of websites or apps they have not used before (11% vs. 6%) while 8-11s are more likely than 12-15s to say they are unsure (7% vs. 4%).

There has been no change since last year in claimed experience of visiting websites for 8-11s or 12-15s.

Figure 64: Experience of visiting websites not used before, among those who go online at home (2010, 2013) or elsewhere (2016, 2017), by age



QC17 – Thinking about all the things you use to go online, in a normal week would you say that you….(prompted responses, single coded).

Base: Children aged 8-15 who go online (463 aged 8-11, 475 aged 12-15). Significance testing shows any change between 2016 and 2017.

Distinguishing between different sources of online content

12-15s are more likely than in 2016 to name the BBC as a source of accurate and true information, both for serious and creative things

Children aged 12-15 who go online were prompted with five sources of online information and were asked to say which one they would turn to first for accurate and true information in each of three scenarios, as shown in Figure 65.

In 2017, no single source (that we asked about) was chosen by a majority of 12-15s for finding accurate and true information online about serious things that are going on in the world. More than two in five would turn to the BBC (43%) while around a quarter would turn to Google (27%). Compared to 2016, 12-15s are more likely to say they would turn first to the BBC for this information (43% vs. 35%)[57]. No other source would be used by more than one in ten children aged 12-15.

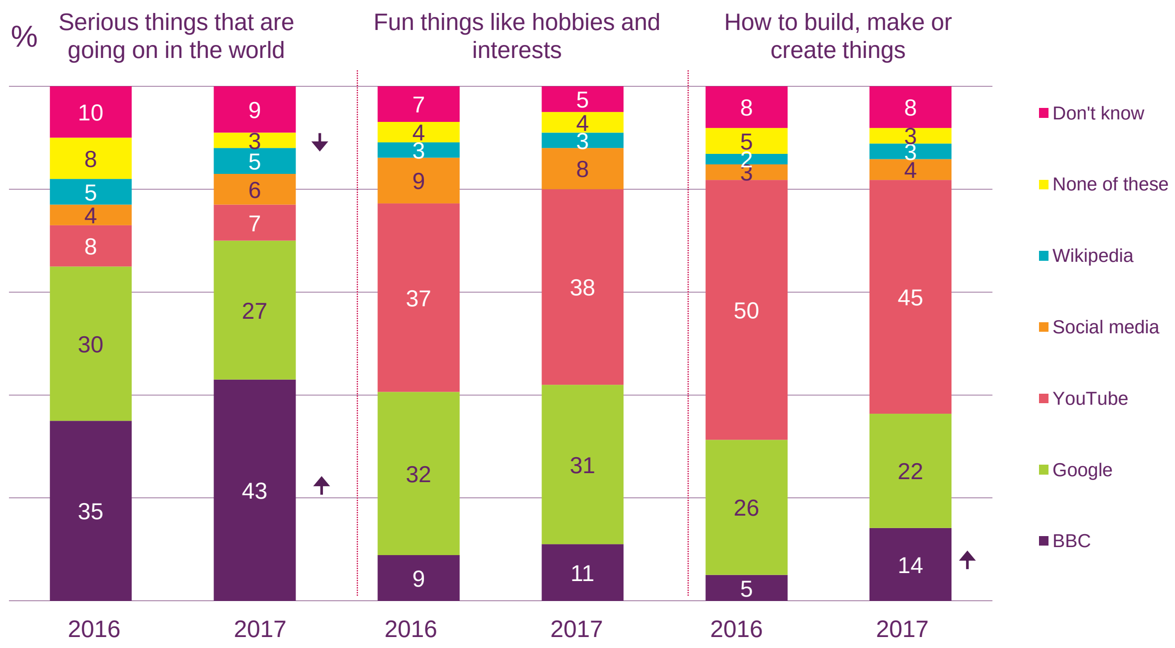
No single online source of information (that we asked about) was preferred by a majority of 12-15s for finding accurate and true information online about 'fun things like hobbies and interests'. Close to two in five 12-15s said they would turn first to YouTube (38%) for this purpose, with one in three

[57] This follows a decrease between 2015 and 2016 from 52% to 35% for the BBC for this particular measure.

opting to use Google (31%) and one in ten opting to use the BBC (11%). Less than one in ten 12-15s said they would be likely to use any other source for this purpose. Each of these measures is unchanged since 2016.

Close to half of children aged 12-15 say they would turn first to YouTube (45%) when looking for information online about how to build, make or create things, with more than one in five (22%) opting to use Google. One in seven (14%) would opt to use the BBC, an increase since last year (5%).

Figure 65: Online sources of accurate and true information for different scenarios among 12-15s: 2016, 2017



QC52A-C I'm going to read out some types of information you may want to find out about and I'd like you to say which one of these you would turn to first for accurate and true information online about… (prompted responses, single coded).

Base: Children aged 12-15 who go online (475 aged 12-15). Significance testing shows any change between 2016 and 2017.

Critical understanding of online content

Compared to last year, 12-15s are less likely to believe that all the information on news sites or apps is true, while 8-11s are more likely to believe this

Children aged 8-15 who go online at home or elsewhere were asked whether they visited three particular types of websites or apps.[58] Those who visited each type were then asked whether they believe that all of the information on these sites or apps is true, or most of it is true, or some of it is true. The results are shown in Figure 66 for sites or apps used for school work/ homework[59], in Figure 67 for social media[60] and in Figure 68 for sites or apps about news and what is going on in the world[61].

The majority of 8-11s (77%) and 12-15s (89%) who go online say they visit websites or apps for schoolwork/ homework, such as BBC Bitesize or sites suggested by their teachers. Of those who do this, 25% of 8-11s and 23% of 12-15s believe that all of the information shown is true. This measure is unchanged since 2016 both for 8-11s and 12-15s.

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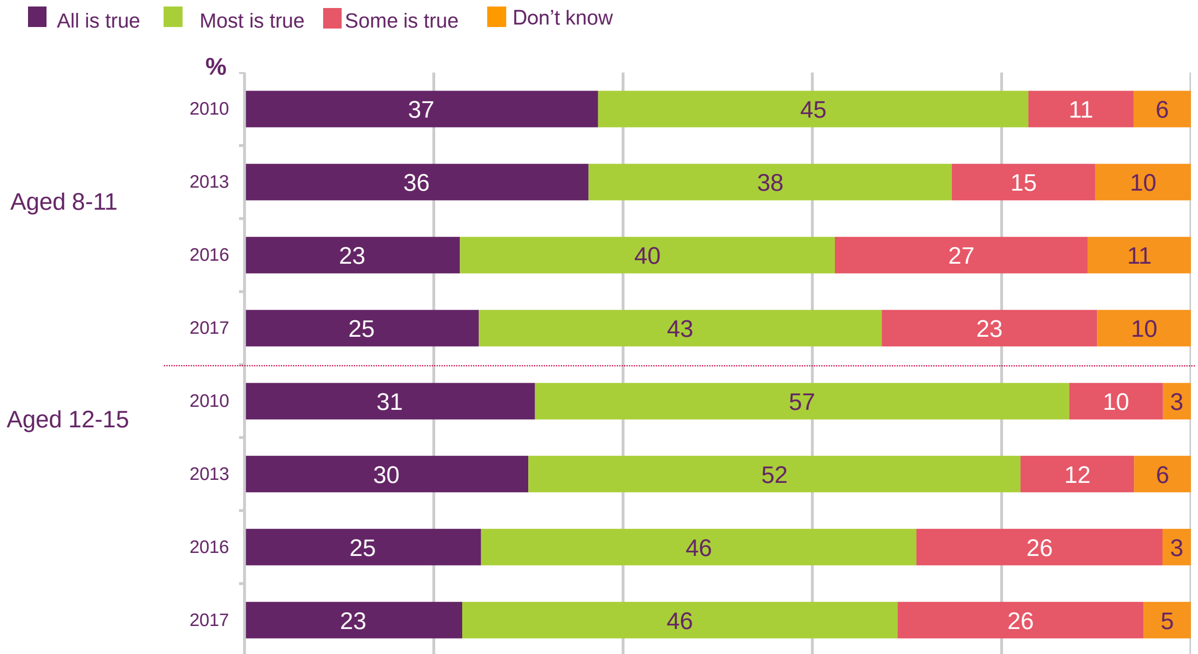
[58] Before 2014, home internet users were asked about types of websites, rather than types of websites or apps.
[59] Since 2016, the question wording incorporated examples of the types of sites or apps referred to, which read 'for instance, BBC Bitesize or sites suggested by your teachers'.
[60] Before 2014, home internet users were asked about social networking sites rather than social media sites or apps.
[61] Since 2016, the question wording incorporated examples of the types of sites or apps referred to, which read 'for instance BBC news, CBBC Newsround, newspaper websites like the Daily Mail or the Guardian or news apps or sites like Buzzfeed'.

Figure 66: Children's belief in the truthfulness in websites used for school/ homework at home (2010, 2013) or elsewhere (2016, 2017), by age



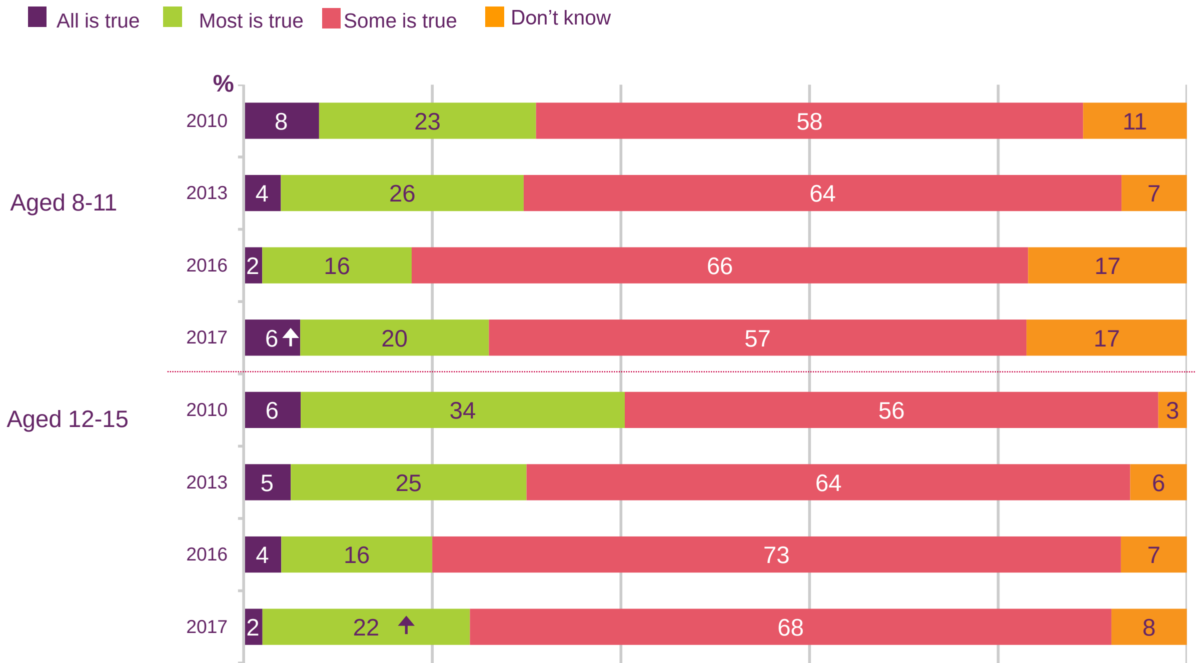
QC15B - When you go online do you visit site or apps for school work or homework, for instance BBC Bitesize or sites suggested by your teachers? IF YES - Do you believe that all of the information you see on these sites or apps is true, most of it is true or just some of it is true? (prompted responses, single coded). Question wording changed in 2016 to include specific examples of the sorts of websites/ apps they might use.

Base: Children aged 8-15 who go online and who say they visit sites or apps for their schoolwork or homework (352 aged 8-11, 420 aged 12-15). Significance testing shows any change between 2016 and 2017.

More than half of 8-11s (53%) and nearly nine in ten 12-15s (87%) who go online say they have visited social media sites or apps (like Facebook, Instagram, Snapchat, Twitter and YouTube). Less than one in ten in each age group who do this believe that all the information on social media sites or apps is true (6% for 8-11s and 2% for 12-15s). This response is more likely than in 2016 for 8-11s (6% vs. 2%)[62].

[62] This increase, however, follows a decrease between 2015 and 2016 for 8-11s, from 8% to 2%.

Figure 67: Children's belief in the truthfulness in websites used for social media at home (2010, 2013) or elsewhere (2016, 2017), by age



QC15A - When you go online do you visit social media sites or apps like Facebook, Instagram, Snapchat, Twitter or YouTube? IF YES - Do you believe that all of the information you see on these sites or apps is true, most of it is true or just some of it is true? (prompted responses, single coded).

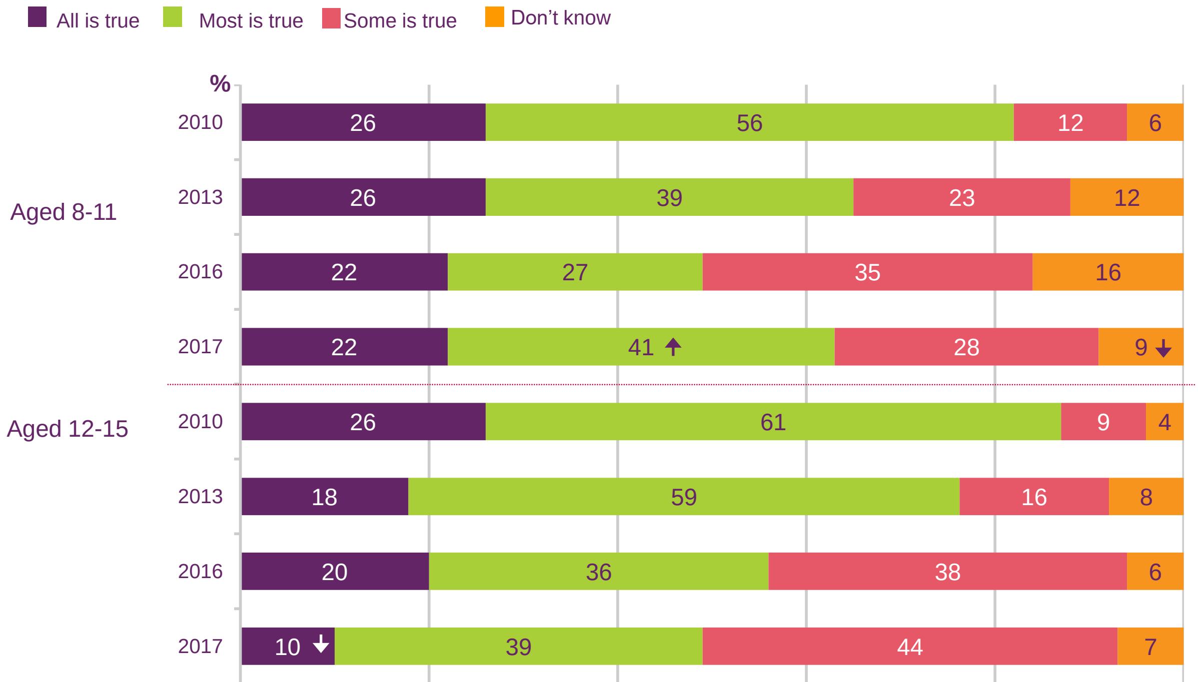
Base: Children aged 8-15 who go online and who say they visit social media sites or apps (231 aged 8-11, 403 aged 12-15). Significance testing shows any change between 2016 and 2017.

More than half of 8-11s (56%) and seven in ten 12-15s (70%) who go online say they visit sites or apps about news and what is going on the world, such as BBC News, CBBC Newsround, newspaper websites like the Daily Mail or the Guardian, or news apps or sites like Buzzfeed[63]. Around one in five 8-11s (22%) and one in ten 12-15s (10%) who do this say that all of this information is true.

Compared to 2016, 12-15s are now less likely to believe that all the information on these sites or apps is true (10% vs. 20%)[64]. This measure is unchanged for 8-11s, although this age group is more likely to say that *most of* the information is true (41% vs. 27%).

[63] The figure of 70% of 12-15s who say they go online and visit sites or apps about news and what is going on in the world is taken from the in-home face-to-face survey. From the online survey, as shown in Figure 58, 22% of 12-15s interested in the news said they found out about or got updates on news stories from 'any other online sources of news, whether a news website or any other type of website or app, e.g BBC website or Buzzfeed'. While there is considerable variation in these incidences, the differences could be attributable to the research methodology; the placement of each question within the questionnaire in terms of potentially being influenced by the questions preceding them. Moreover, the question in the face-to-face study is broader, referring to 'what is going on in the world' as well as news, which might also explain the higher numbers who say they do this.
[64] This decrease, however, follows an increase between 2015 and 2016 for 8-11s, from 14% to 20%.

Figure 68: Children's belief in the truthfulness in news websites or apps used at home (2010, 2013) or elsewhere (2016, 2017), by age



QC15C - When you go online do you visit sites or apps about news and what is going on in the world, for instance BBC news, CBBC Newsround, newspaper websites like the Daily Mail or Guardian or news apps or sites like Buzzfeed? IF YES - Do you believe that all of the information you see on these sites or apps is true, most of it is true or just some of it is true? (prompted responses, single coded) Question wording changed in 2016 to include specific examples of the sorts of websites/ apps they might use.

Base: Children aged 8-15 who go online and who say they visit sites or apps about news and what is going on in the world (255 aged 8-11, 332 aged 12-15). Significance testing shows any change between 2016 and 2017.

While the majority of 8-15s who use search engines are aware that not all Google results should necessarily be trusted, around a quarter think that if Google has listed a result it will be trustworthy

Children aged 8-15 who ever use search engines (86% of all 8-11s and 91% of all 12-15s who go online) were asked about the trustworthiness of search results returned by Google. Children were asked to say which of the following statements was closer to their opinion:

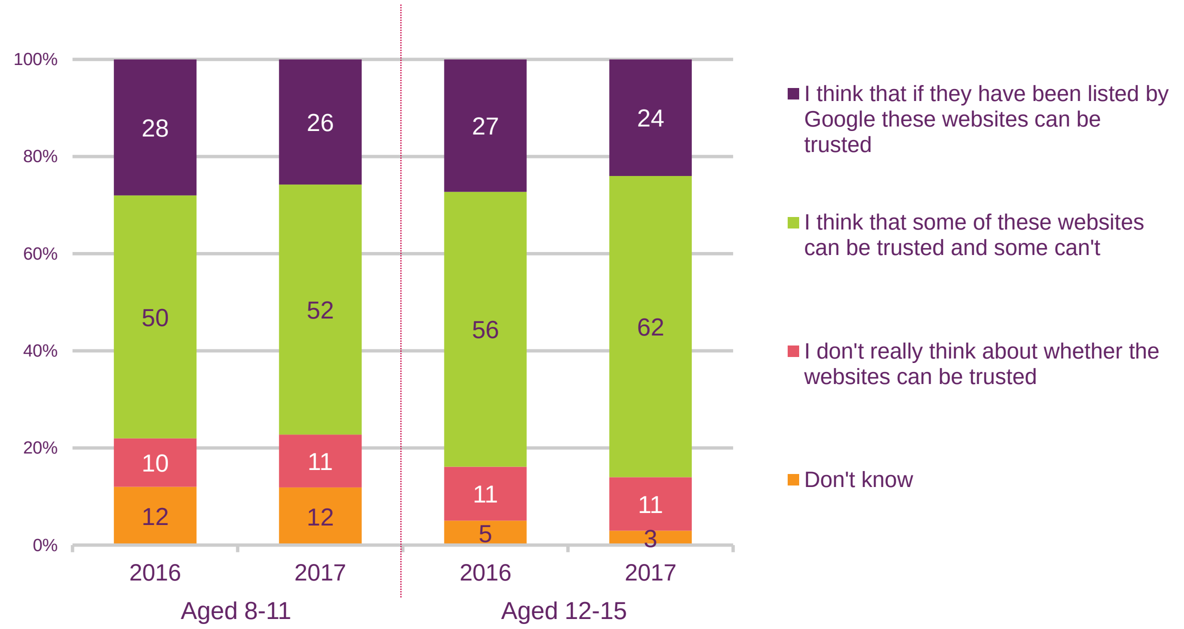
- "I think that if they have been listed by Google, these websites can be trusted."
- "I think that some of these websites can be trusted and some can't."
- "I don't really think about whether the websites can be trusted."

As shown in Figure 69, more than half of all search engine users aged 8-11 (52%) or 12-15 (62%) make some type of critical judgement about search engine results, believing that some of the sites returned can be trusted and some can't[65].

A quarter of 8-11s (26%) and 12-15s (24%) believe that if a website has been listed by Google it can be trusted, while about one in ten in each age group don't think about whether Google results can be trusted (11% for both 8-11s and 12-15s).

Each of these measures is unchanged since 2016.

Figure 69: 8-15s' understanding of whether results listed by search engines can be trusted: 2016 and 2017



QC26 – When you use Google to look for something online, you are given a list of websites in the Google results page. Which one of these sentences about these results do you agree with most? (prompted responses, single coded).

Base: Children aged 8-15 who go online and use search engine websites or apps (392 age 8-11, 432 aged 12-15). Significance testing shows any change between 2016 and 2017.

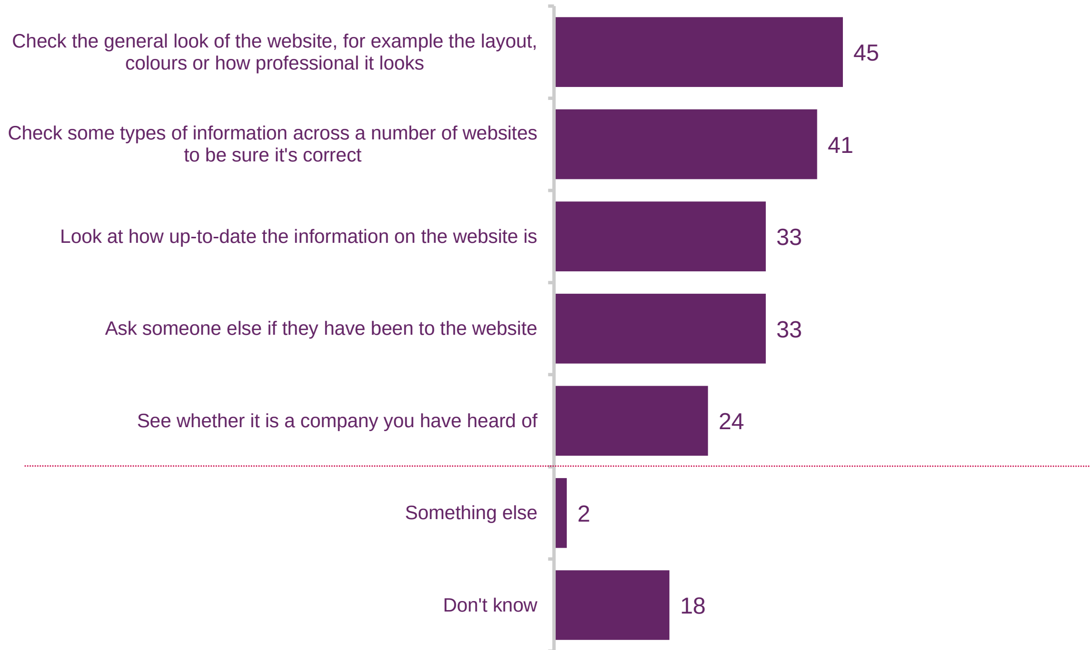
[65] This question was amended in 2016 and the results are therefore not directly comparable with previous years. Before 2016, search engine users aged 12-15 were asked about the 'truthfulness' of the information that appears in the websites listed by Google

Close to half of 12-15s who visit sites or apps they've not used before say they would consider how professional the site appeared if they were unsure whether it could be trusted

In 2017, children aged 12-15 who go online and who say they ever visit sites they have not used before (43% of all internet users aged 12-15) were asked the following question: "If you were using a website or app you hadn't visited before to look for information online and you weren't sure whether you could trust the website or app, which of these things, if any, might you check?"[66]. They were prompted with five potential checks and the option to nominate any other check, and the responses are shown in Figure 70.

No single check would be made by a majority of 12-15s, although more than two in five (45%) say they would check the general look of the website, for example the layout, colours or how professional it looks. Two in five (41%) would cross-check some types of information on a number of websites, while one-third would check how-up-to date the information on the website was, or would ask someone else if they had used the website (both 33%). A quarter (24%) would rely on whether they had previously heard of the company. Close to one in five (18%) say they are unsure as to what they might do.

Figure 70: Checks made by 12-15s who go online to establish whether they can trust websites they haven't visited before: 2017



QC18 – If you were using a website or app you hadn't visited before to look for information online and you weren't sure whether you could trust the website or app, which of these things, if any might you check? (prompted responses, multi-coded).

Base: Children aged 12-15 who go online who use websites they've not used before (205).

[66] This question was amended in 2017 and the results are not therefore comparable with previous years.

Making judgements about the trustworthiness of news sources

As discussed previously, in 2017 the main in-home survey among parents and children was complemented by an online survey among children aged 12-15. This survey included additional questions about children's attitudes to news. The data about children's news consumption from this online survey has been reported in the previous chapter (Section 10). This section addresses the judgements children make about the trustworthiness of the news sources they use, with a particular focus on the use of social media as a news source. It then addresses the findings from the online survey relating to children's awareness of fake news.

12-15s are more likely to be circumspect about the truthfulness of news updates they see on social media

Earlier in Section 10, Figure 59 showed the news sources that internet users aged 12-15 who are interested in news use to get updates on news stories, and whether the source is a 'top' source (one of the three they use most often).

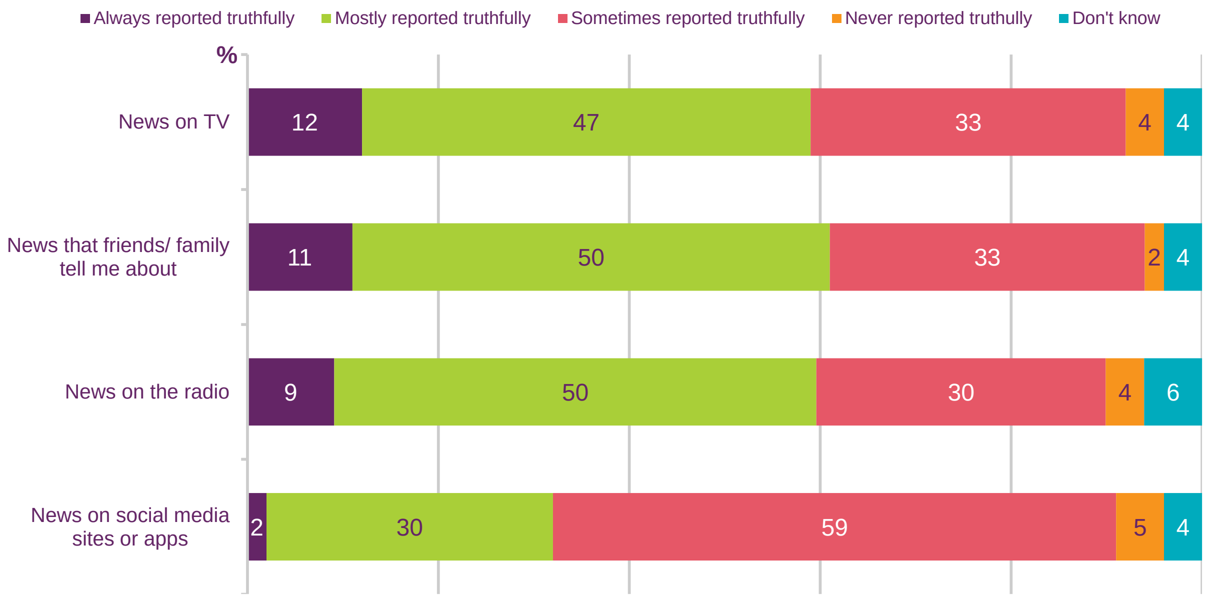
Children who nominated a source that was one of their top three were then asked the extent to which they felt news from that source was reported truthfully. The results for the four most frequently nominated of these sources[67] are shown in Figure 71.

The most common response for news on TV, the radio, and news from friends and family, is that the news is *mostly* reported truthfully, followed by that it is *sometimes* reported truthfully. For news from social media this trend is reversed; the most frequently-cited response is that news is *sometimes* reported truthfully, followed by *mostly* reported truthfully.

A small proportion of those for whom TV, radio and friends and family are top sources say that this news is always reported truthfully (12% for TV, 11% for friends and family and 9% for radio). Considerably fewer (2%) say that news on social media sites or apps is always reported truthfully. A small proportion also say that this news is never reported truthfully, for each source, ranging from 2% of those who cite friends and family as a top source to 5% for social media.

[67] It is not possible to show the results for the remaining four sources shown in Figure 59 as fewer than 100 children nominated them as one of their three most-used sources.

Figure 71: Attitudes towards the truthfulness of news sources used among 12-15s who go online: 2017



Source: Online survey with children aged 12-15.

Q25 - Which one of these answers best describes news that you read or see… I think news on TV/ that friends/ family tell me about/ on the radio/ on social media sites or apps… is always reported truthfully/ is mostly reported truthfully/ is sometimes reported truthfully/ is never reported truthfully (prompted responses, single coded).

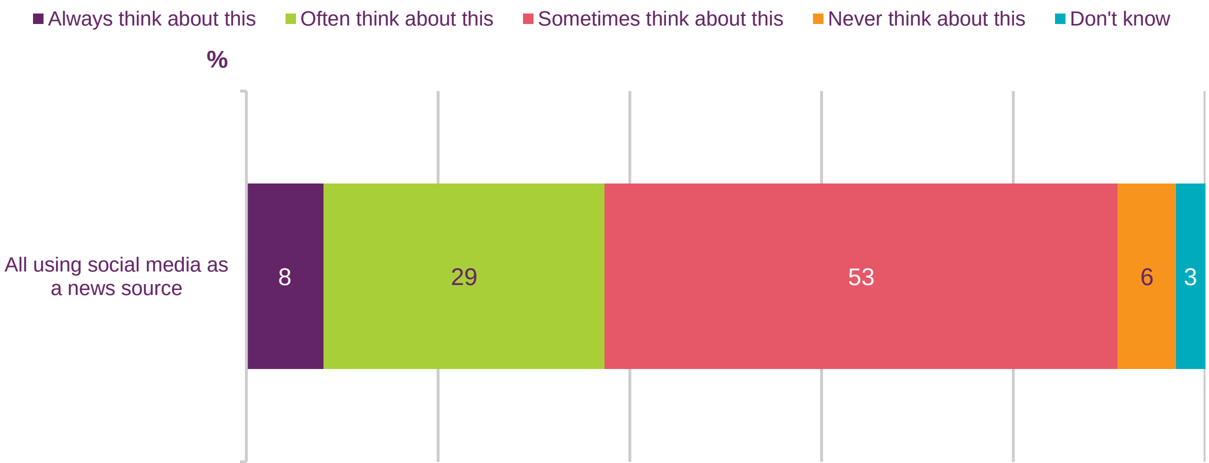
Base: Children aged 12-15 who go online who are interested in the news who nominate each of the following as a main (top three) source for news updates - news on TV (280)/ news that they are told about by friends or family (199)/ news on the radio (110)/ news on social media sites or apps (236).

Nine in ten 12-15s using social media for news say they ever think about whether a story is true; close to one in ten say they always think about this

Internet users aged 12-15 interested in news, who ever use social media websites or apps as a news source,[68] were asked the following question: "When you read or see a news story on social media sites or apps how often, if at all, do you think about whether the story is actually true?"

Nine in ten (90%) of these children say they ever think about whether the news story is actually true, with 6% saying they never think about this. More than half (53%) say they sometimes think about it, while three in ten (29%) often think about it. Close to one in ten 12-15s (8%) say they always think about it.

Figure 72: Frequency with which 12-15s who use social media as a news source consider whether the social media story is actually true: 2017



Source: Online survey with children aged 12-15.

Q26 - When you read or see a news story on social media sites or apps how often, if at all do you think about whether the story is actually true? (prompted responses, single coded).

Base: Children aged 12-15 who go online who are interested in the news who use social media as a news source (262).

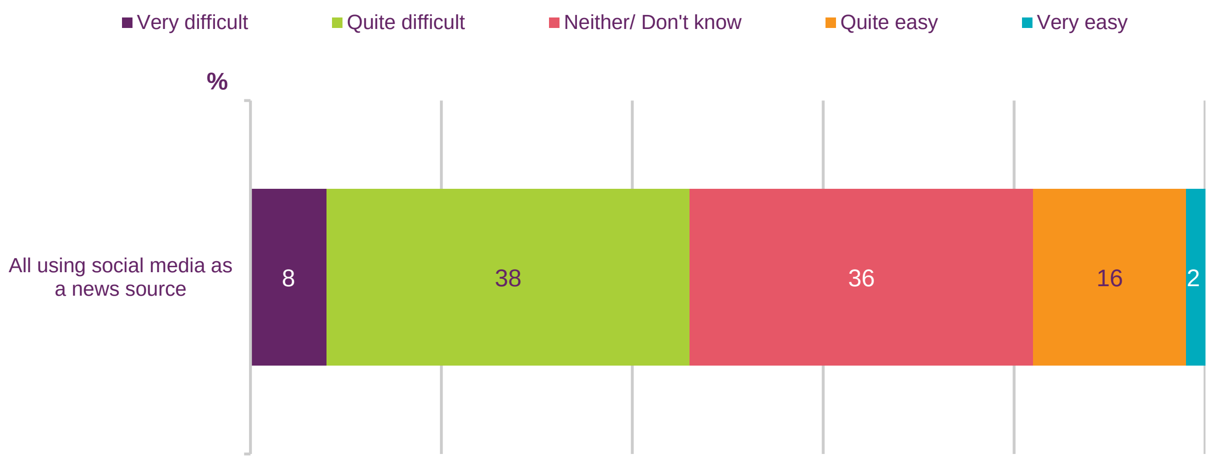
[68] 56% of all interested in news, 54% of all 12-15s who go online.

Close to half who use social media for news think it is difficult to tell whether a story is true

Internet users aged 12-15 interested in news, who ever use social media websites or apps as a news source,[69] were also asked how easy or difficult it is to tell whether a news story on social media is true.

The results are shown in Figure 73. Eight per cent feel it is 'very' difficult to tell whether a news story on social media is true, with around four times as many feeling it is 'quite' difficult (38%). As such, close to half (46%) say they feel it is difficult overall. This compares to around one in five (18%) who feel it is easy to tell whether it is true; 16% say it is 'quite' easy and 2% consider it 'very' easy.

Figure 73: Ease with which 12-15s who use social media as a news source are able to gauge the truthfulness of news stories on social media: 2017



Source: Online survey with children aged 12-15.

Q27 - How easy or difficult is it to tell whether a news story on social media is true? (prompted responses, single coded).

Base: Children aged 12-15 who go online who are interested in the news who use social media as a news source (262).

[69] 56% of all interested in news, 54% of all 12-15s who go online

Around two in four who use social media for news say that if they wanted to check the story they would see if it was from a known or trusted organisation

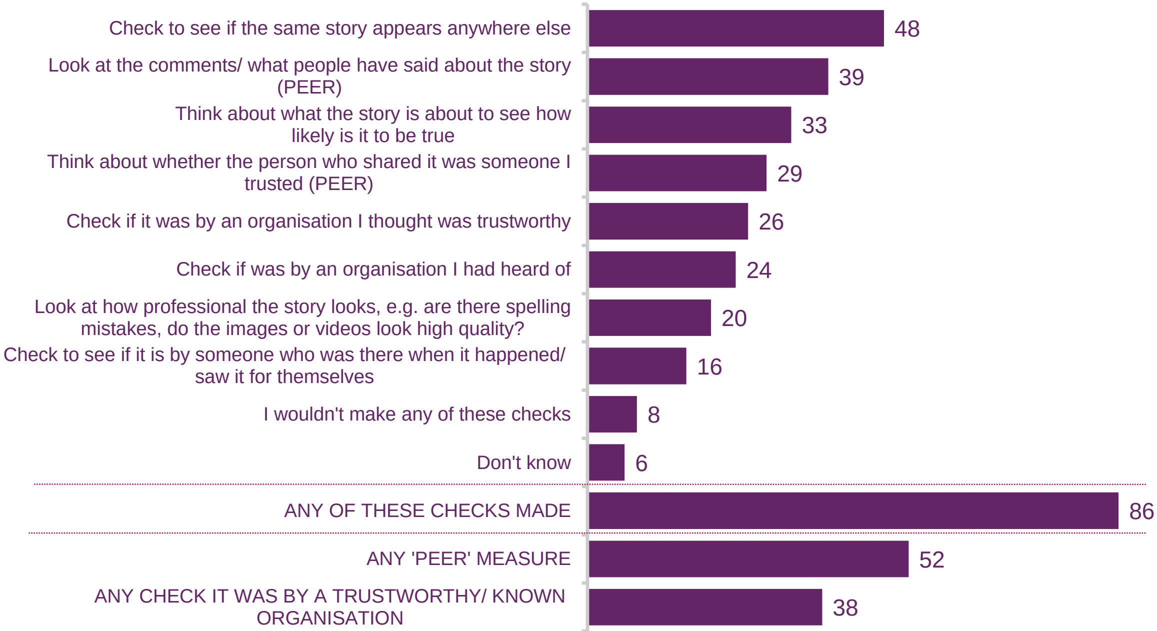
Children aged 12-15 using social media as a news source were also asked the following question: "When you read or see a news story on social media sites or apps which if any of these things would you ever do if you wanted to check the story?"

More than four in five (86%) say they would potentially make any of the checks they were asked about. Close to half of these (48%) say they would check to see if the story appeared elsewhere, making this the most popular potential check. Four in ten 12-15s would look at the comments to see what people had said about the news story (39%) while a third would think about the story to assess the likelihood of it being true (33%). Three in ten would potentially think about whether the person who shared the story could be trusted (29%). A quarter would check whether the source of the story was an organisation they considered trustworthy (26%) or would check whether they knew the organisation (24%). One in five (20%) would check how professional the story appeared, and one in six (16%) would assess whether it was a first-hand account, reported by someone who saw it for themselves.

Less than one in ten (8%) say they would not make any of these checks.

Grouping together some of these potential checks, a majority (52%) would rely on a 'peer-based' judgement, either by looking at what others had said about the story, or by assessing whether the person who shared the story was trustworthy, while close to two in five (38%) would assess whether the source of the story was a known or trustworthy organisation.

Figure 74: Potential checks made on news stories appearing on social media among 12-15s who use social media as a news source: 2017



Source: Online survey with children aged 12-15.

Q28 - When you read or see a news story on social media sites or apps which if any of these things would you ever do if you wanted to check the story? (prompted responses, multi-coded).

Base: Children aged 12-15 who go online who are interested in the news who use social media as a news source (262).

Children's awareness and experience of fake news

Two in five 12-15s who go online say they have seen something online or on social media that they thought was fake news

As shown in Figure 75, close to three-quarters of 12-15s who go online (73%) say they are aware of fake news. While not shown below, those 12-15s who said they were aware of fake news were then provided with a description of fake news[70] and were asked whether that description matched their understanding of fake news. Overall, nine in ten (92%) said that the definition corresponded with their understanding.

Two in five who are aware of fake news (39%) say they have ever seen something online or on social media that they consider fake news[71] while a third as many (13%) say they haven't seen anything like this. The remaining one in five (21%) are unsure.

Figure 75: Awareness and experience of fake news among 12-15s who go online: 2017

Source: Online survey with children aged 12-15.

Q30 - Have you ever heard of 'fake news'? (prompted responses, single coded)/ Q32 - Have you ever seen anything online or on social media that you thought was a 'fake news' story? (prompted responses, single coded)

Base: Children aged 12-15 who go online (500).

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[70] The following definition of fake news was provided to 12-15s: "Fake news stories are those that are false or made up that can appear on websites or on social media as well as on TV, radio or in newspapers. They are written deliberately to mislead people".

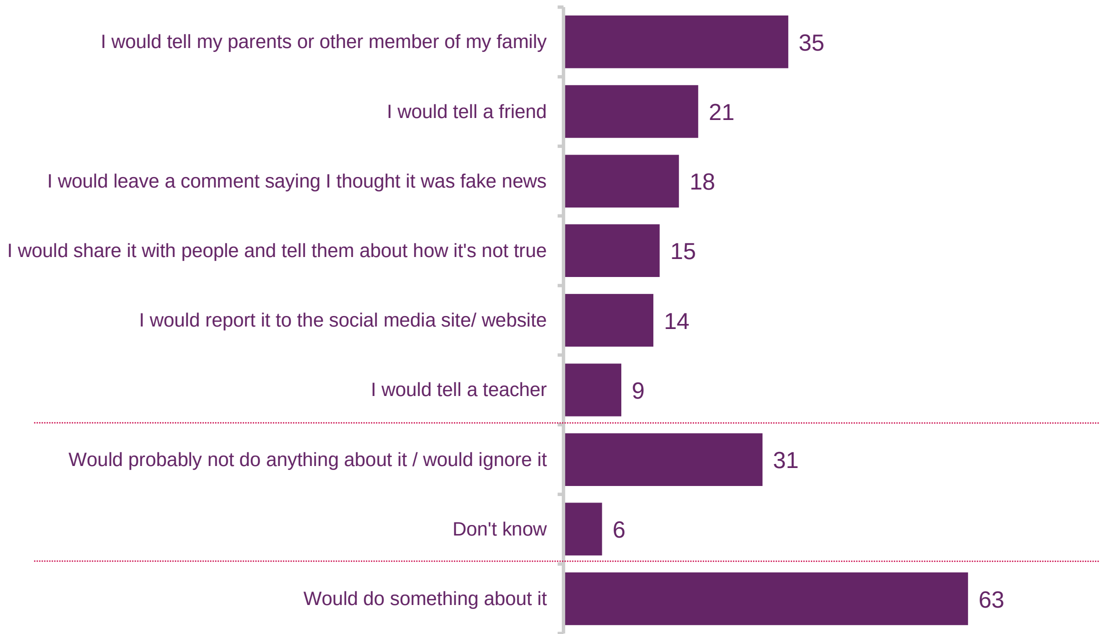
[71] Children were provided with the correct definition of fake news before being asked about whether they had ever seen anything on social media that they thought was a fake news story. It is not therefore necessary to exclude from Figure 75 those who were initially incorrect in their understanding of what constituted fake news.

Six in ten 12-15s aware of fake news say they would take action if they saw such content online

Internet users aged 12-15 who are aware of fake news were also asked what, if anything, they would do if they saw something online or on social media they suspected of being fake news.

More than three in five (63%) say they would do something about it, while three in ten say they would just ignore it (31%). One in three say they would tell their parents or other family member (35%) while around one in five would either tell a friend (21%) or leave a comment flagging it as fake news (18%). Fifteen per cent would share it with other people to tell them it was not true, and a similar proportion would report it to the website/ social media site (14%). One in ten would tell a teacher (9%).

Figure 76: Potential reactions to fake news content among 12-15s aware of fake news: 2017



Source: Online survey with children aged 12-15.

Q33 - If you did see a story on social media or online that you thought was 'fake news' what, if anything would you do about it? (prompted responses, single coded).

Base: Children aged 12-15 who go online and who are aware of fake news (378).

Differences by gender and socio-economic group

Boys aged 8-11 are more likely than girls to say that the results returned by a Google search can be trusted

There are some differences by gender in children's knowledge and understanding of their media environment[72].

Girls aged 12-15 are more likely than boys to say they only use websites or apps they've used before (60% vs. 46%). Neither boys nor girls aged 12-15 are more likely to say they use lots of websites or apps they've not used before, but boys are more likely than girls to say they use one or two websites or apps that they've not used before (39% vs. 27%).

There are no differences by gender within age for 8-11s or 12-15s in terms of their belief in the truthfulness of information on websites used for schoolwork/ homework, for social media or for news. However, among 8-15s overall, girls are more likely than boys to say that all the information on sites used for school or homework is true (27% vs. 21%).

While there are no differences by gender in the likelihood of making any checks on news stories that appear on social media, among 12-15s using social media sites or apps as a news source, girls are more likely than boys to say they would potentially rely on one specific check: looking at the comments/ seeing what people have said about the story (46% vs. 32%).

Boys aged 8-11 who go online and use search engine websites or apps are twice as likely as girls to feel that results returned by a Google search can be trusted (34% vs. 17%). Girls aged 8-11 are more likely to say they don't think about whether the results returned by a Google search can be trusted (15% vs. 6%).

12-15s who go online in ABC1 households are more likely than those in C2DE households to be aware of and to have seen something online that they thought was fake news

There are some differences in knowledge and understanding of media by household socio-economic group[73].

Children aged 12-15 who go online in ABC1 households are more likely than those in C2DE households[74] to nominate the BBC as the online source they would turn to first for accurate and true information about serious things that are going on in the world (47% vs. 37%). Those in C2DE households are more likely to use Google for this purpose (33% vs. 21% for ABC1s).

Children aged 8-15 in DE households who visit social media sites or apps are more likely than average to believe that all the information on these sites is true (7% vs. 3% for all 8-15s).

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[72] In some instances it is not always possible to make comparisons by gender due to low base sizes – particularly for some of the questions on the online survey that were filtered on particularly types of users (i.e. those that use social media as a news source).
[73] See footnote 72.
[74] As this question was asked of 12-15s who go online it is not possible to analyse by all four socio-economic groups compared to the average for 12-15s, so instead compare those in ABC1 households to those in C2DE households.

Children aged 12-15 in ABC1 households who go online are more likely than those in C2DE households to say they have heard of fake news (81% vs. 64%) and are more likely to say they have seen something online or on social media that they thought was fake news (46% vs. 31%).

12. Knowledge and understanding of media – advertising and media content

This section looks at the extent to which older children (aged 8-15) understand their media environment. It explores the extent to which children see advertising on TV or online and their attitudes towards the truthfulness of this advertising. It also looks at children's understanding of how paid-for content appears in Google search results, their awareness of personalised online advertising and of in-game advertising that encourages players to 'pay to win'. It looks at awareness of product endorsement by vloggers, children's attitudes towards providing personal details to sites or apps, and their understanding of how different media are funded.

Key findings

- The most common response among 8-15s who see TV and online adverts is that each type of advertising 'sometimes' tells the truth about what they are selling.
- 12-15s who see TV adverts are more likely to say these 'mostly' tell the truth about what they are selling (34%) than those who see online adverts are to say these adverts 'mostly' tell the truth (27%). Few 8-11s or 12-15s say that TV or online adverts 'always' tell the truth.
- Despite their being distinguished by a green box with the word 'Ad' in it, only a minority of 8-11s (28%) and 12-15s (43%) who use search engines correctly identified sponsored links on Google as advertising, consistent with our 2016 findings. At this question children were allowed to select more than one response, so while some of these children correctly identified the results as advertising they may also have given incorrect responses. A smaller proportion of 8-15s understood that this was the only reason the results were displayed (22% for 8-11s and 32% for 12-15s).
- Children aged 8-11 and 12-15 who understand that some of the websites returned by Google can be trusted and some cannot (52% of those aged 8-11 and 62% of those aged 12-15 who use search engine websites or apps) are more likely than all search engine users to identify sponsored links on Google as advertising (42% vs. 36%), and are also more likely to give *only* the correct response (32% vs. 27%).
- More than half of 12-15s who go online (58%) are aware of personalised advertising, in that they are aware that other people might see adverts online that are different to those they see, unchanged since 2016.
- Six in ten internet users aged 12-15 (62%) are aware that vloggers may be being paid to endorse a product they say favourable things about, similar to last year.
- Six in ten 12-15s who play games (61%) are aware of advertising that encourages them to 'pay-to-win', unchanged since 2016.
- One in five (19%) 12-15s agree they give details about themselves online to be able to get something they want, compared to 47% who disagree. Compared to 2016, children are more likely to be neutral or unsure about this (34% vs. 22%) and less likely to disagree (47% vs. 60%).

- Half of 12-15s who go online (53%) think that they can easily delete information they have posted about themselves online if they don't want people to see it.
- There has been almost no change since 2016 in the extent of understanding of how the BBC, YouTube and Google are funded, and it remains the case that children aged 12-15 are more likely to understand how Google and YouTube are funded than to understand how the BBC is funded.

Differences by gender

- Girls are more likely than boys aged 12-15 to be unsure about personalised advertising and about funding for YouTube.

Differences by household socio-economic group

- Children in AB households are more likely than the average for 8-15s to be aware of sponsored links in Google search results.

Awareness and understanding of advertising in media

This section looks at children's awareness and understanding of advertising in media. It covers advertising on TV and online, advertising that appears in Google search results as well as personalised advertising that appears more generally online, and in-game advertising that encourages players to 'pay to win'. It also looks at awareness of product endorsement by vloggers.

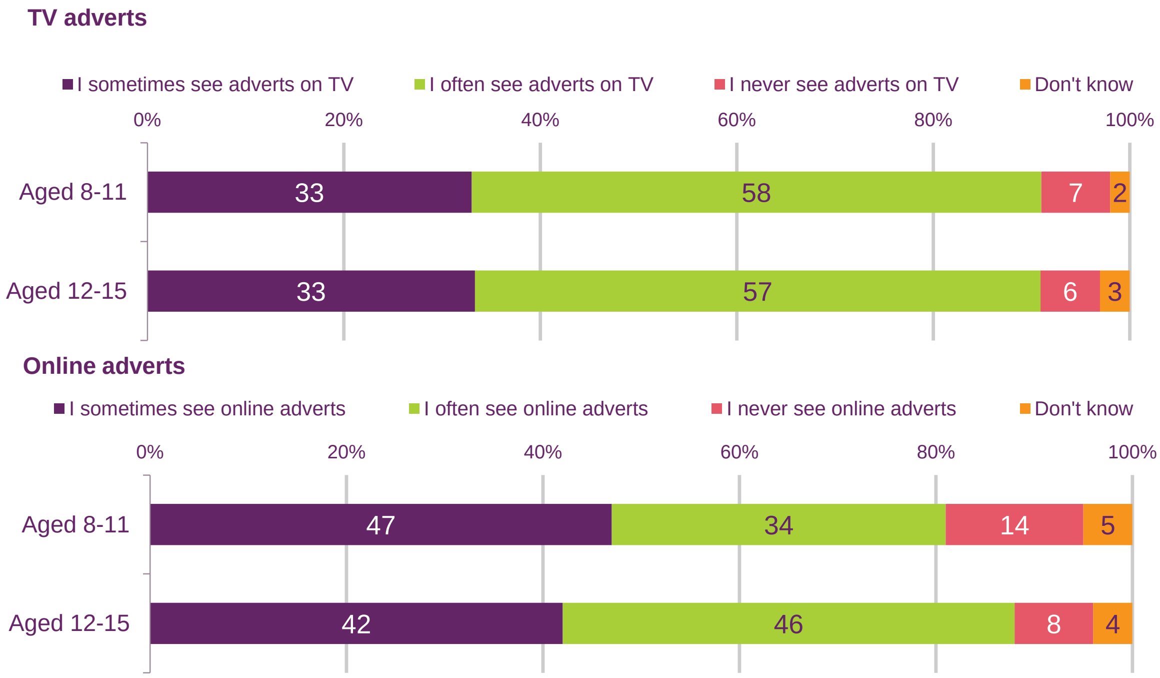
Most 8-15s have seen TV and online advertising

In 2017, questions were added to the study to look at awareness of TV advertising among 8-15s who watch TV at home or elsewhere, and awareness of online advertising among 8-15s who go online at home or elsewhere. The results are shown in Figure 77. Those aware of each type of advertising were then asked the extent to which they feel that the adverts tell the truth about what they are selling, as shown in Figure 78.

Among those who watch TV, there are no differences by age in the frequency with which children see TV adverts. Nine in ten 8-11s (91%) and 12-15s (90%) ever see adverts on TV, and more than half of 8-11s (58%) and 12-15s (57%) say they often see adverts on TV; a third (33% for both age groups) say they sometimes see adverts on TV.

Among those who go online, children aged 12-15 (88%) are more likely than those aged 8-11 (81%) to say they ever see online adverts, and more likely to say this happens often (46% for 12-15s, 34% for 8-11s).

Figure 77: Frequency of seeing adverts on TV and online among 8-15s who watch TV/ go online: 2017



QC5A - Which one of these answers best describes how often you see adverts when you watch TV? (prompted responses, single coded).

Base: Children aged 8-15 who watch TV at home or elsewhere (488 aged 8-11, 467 aged 12-15).

QC35A - When you go to websites or use apps which one of these answers best describes how often you see any online adverts? (prompted responses, single coded).

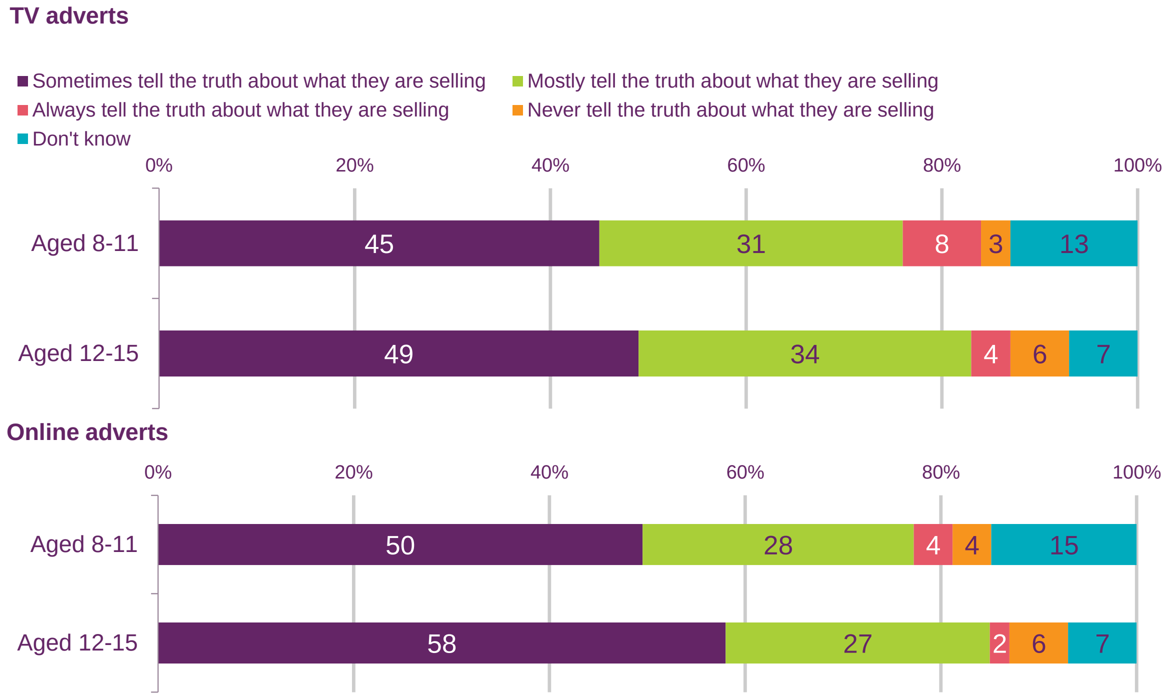
Base: Children aged 8-15 who go online at home or elsewhere (463 aged 8-11, 475 aged 12-15).

Children aged 12-15s are more likely to say TV adverts ‘mostly’ tell the truth than to say this about online adverts

Those aware of TV advertising were asked to say whether TV adverts tell the truth about what they are selling ‘sometimes’, ‘mostly’, ‘always’ or ‘never’. As shown in Figure 78, the most likely response is that the TV adverts ‘sometimes’ tell the truth about what they are selling; given by around half of 8-11s (45%) and 12-15s (49%). About a third of 8-11s (31%) and 12-15s (34%) who ever see TV advertising say that these adverts ‘mostly’ tell the truth about what they are selling. Few (8% of 8-11s and 4% of 12-15s) say that TV adverts ‘always’ tell the truth, and more are unsure (13% of 8-11s and 7% of 12-15s). Children aged 12-15 are more likely than 8-11s to say that TV adverts ‘never’ tell the truth about what they are selling (6% vs. 3%).

Those aware of online advertising were asked the same question. As shown in Figure 78**Figure 71**, the most likely response is that the online adverts ‘sometimes’ tell the truth about what they are selling, given by half of 8-11s (50%) and 58% of 12-15s. Around three in ten of 8-11s (28%) and 12-15s (27%) who ever see online advertising say that these adverts ‘mostly’ tell the truth about what they are selling. Very few (4% of 8-11s and 2% of 12-15s) say that online adverts ‘always’ tell the truth; more respondents are unsure (15% of 8-11s and 7% of 12-15s). Children aged 12-15 (6%) are as likely as 8-11s (4%) to say that online adverts ‘never’ tell the truth about what they are selling.

Figure 78: Attitudes toward the truthfulness of TV and online advertising among 8-15s who see TV/ online advertising: 2017



QC5B - Which one of these answers best describes how you feel about these TV adverts? I think the TV adverts.... (prompted responses, single coded).

Base: Children aged 8-15 who say they ever see adverts on TV (447 aged 8-11, 425 aged 12-15).

QC35B - Which one of these answers best describes how you feel about these online adverts? I think the online adverts.... (prompted responses, single coded).

Base: Children aged 8-15 who say they ever see adverts online (370 aged 8-11, 423 aged 12-15).

A minority of 8-15s can identify sponsored links in search engine results, despite their being distinguished by a green box with the word 'Ad' in it

Children aged 8-15 who use search engine websites or apps were shown a printed screenshot of the results returned by Google for an online search for 'children's trainers'. Their attention was drawn to the first two results at the top of the list, which were distinguished by a green box with the word 'Ad' written in it. They were then prompted with possible options and were asked whether any of these applied to these first two results. The options they were prompted with were[75]:

- These are adverts/ they have paid to appear here
- These are the best results
- These are the most popular results

The results are shown in Figure 79 below. Around three in ten 8-11s (28%) stated that the first two results were advertising/ had paid to appear there. Compared to 8-11s, 12-15s demonstrate a better

[75] They were also allowed to nominate some other reason or say that they were unsure.

understanding of which results are sponsored or paid for, with around four in ten 12-15s (43%) giving the correct response.

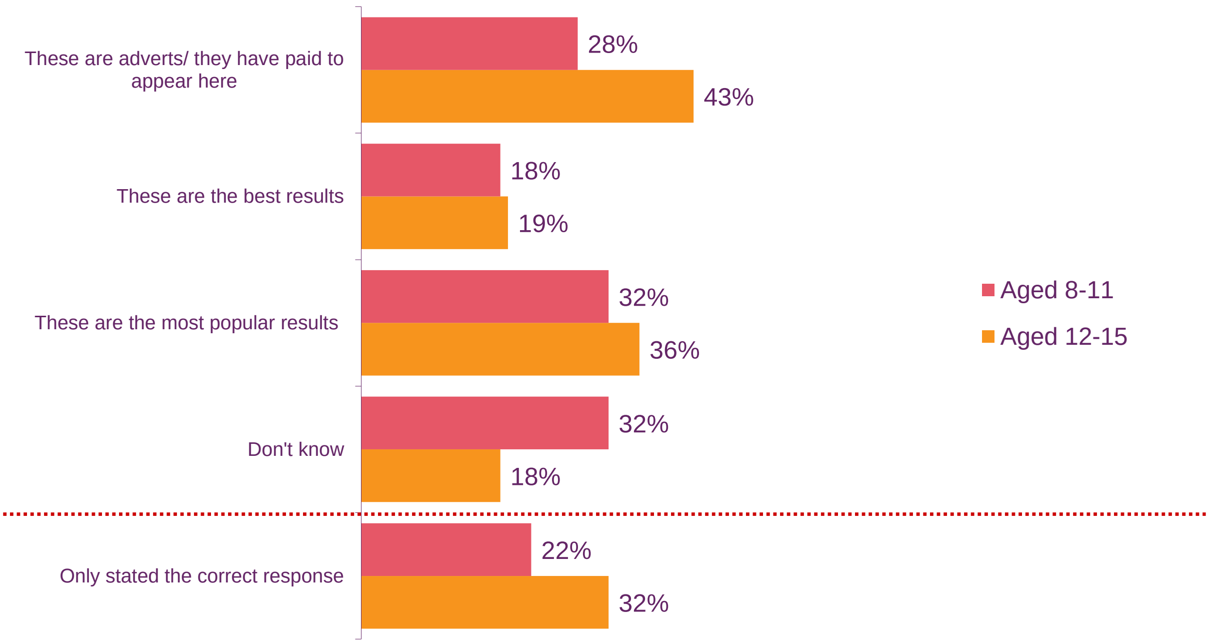
Similar proportions of 8-11s and 12-15s gave incorrect responses: either saying these were the best results (18% for 8-11s and 19% for 12-15s), or were the most popular results (32% for 8-11s and 36% for 12-15s). Three in ten 8-11s (32%) stated they were unsure, higher than among 12-15s (18%).

Children were allowed to select more than one response to this question, so it is also worthwhile looking at those who gave only the correct response and did not select any of the other options. One in five 8-11s (22%) and one-third of 12-15s (32%) gave only the correct response; that is, they only stated that the results were adverts. As such, a majority of search engine users in each age group either gave an incorrect response or were unsure.

While not shown in Figure 79, the findings from the 2017 study are consistent with 2016 findings, with no significant differences for either age group.

In 2017 there is a relationship between understanding that not all search engine results can be trusted, and recognising advertising on search engines. Those children aged 8-11 and 12-15 who understand that some of the websites returned by Google can be trusted and some cannot (52% of those aged 8-11 and 62% of those aged 12-15 who use search engine websites or apps, as shown earlier in Figure 69) are more likely than all search engine users to be aware that the first two results are adverts (42% vs. 36%), and are also more likely to give only the correct response (32% vs. 27%). These differences were not evident last year.

Figure 79: Understanding of paid-for results returned by Google searches, among 8-15s who use search engine websites: 2017



QC28 - This is a picture (SHOWCARD OF IMAGE) from a Google search for 'children's trainers'. Do you know why the first two results shown under the pictures have been listed first? (prompted responses, multi-coded).

Base: Children aged 8-15 who go online at home or elsewhere and use search engine websites or apps (392 aged 8-11, 432 aged 12-15). Significance testing shows any change between 2016 and 2017.

More than half of 12-15s who go online are aware of personalised advertising

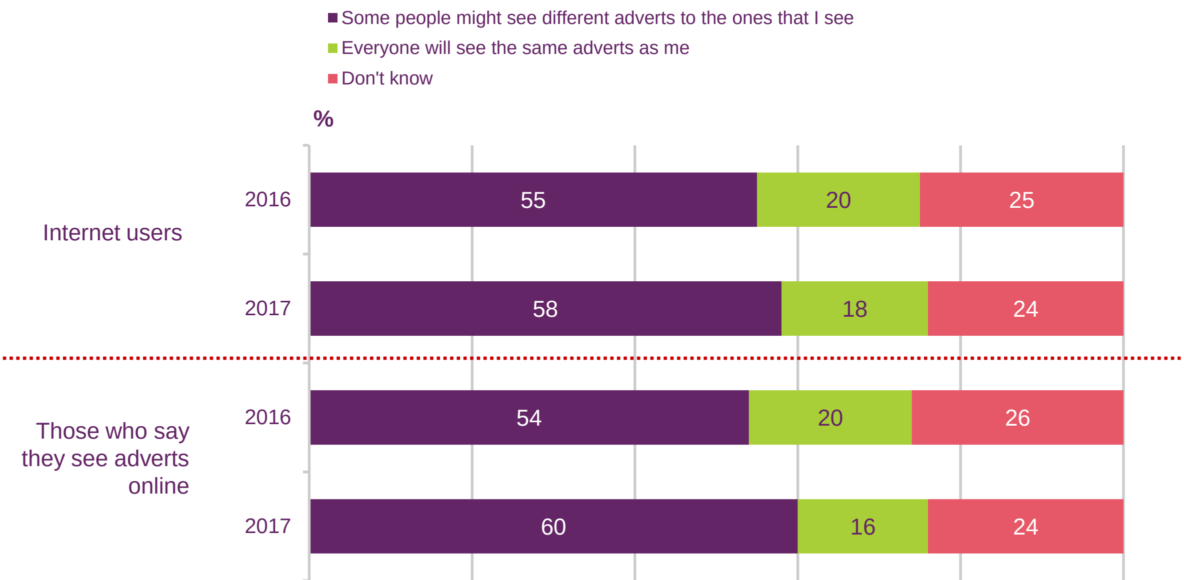
Children aged 12-15 who go online were prompted with two options and were asked which one applied to any advertising they might see on a website or app that they visited[76].

Figure 80 shows that more than half of 12-15s (58%) are aware of personalised advertising, in that they are aware that some people might see different adverts to those that they see. This is in line with the finding from 2016 (55%).

One in five 12-15s (18%) say that everyone would see the same adverts, while one in four are unsure (24%). Both measures are similar to those from 2016 (20% and 25% respectively).

As already detailed at Figure 77, eight in ten internet users aged 12-15 (88%) say they see adverts when they visit websites or apps. In 2017, as in 2016, awareness of personalised advertising for this group of children (60%) does not differ from that of all internet users aged 12-15 (58%).

Figure 80: Awareness among 12-15s of personalised advertising: 2016 and 2017



QC36 - If someone in the same country as you visits the same website or app at the same time as you, which one of these things applies to any advertising shown? (prompted response, single coded)

Base: Children aged 12-15 who go online at home or elsewhere (475)/ Children aged 12-15 who say they see ads online (423). Significance testing shows any change between 2016 and 2017.

[76] In 2017 the specific question stated: *If someone in the same country as you visits a website or app at the same time as you, which one of these things applies to any advertising shown?* The purpose of this question was to gauge the extent to which children were aware of personalised advertising. The question wording was close to that used in the 2016 study: *When someone in the same country as you visits a website or app at the same time as you, which one of these things applies to any advertising you can see?*

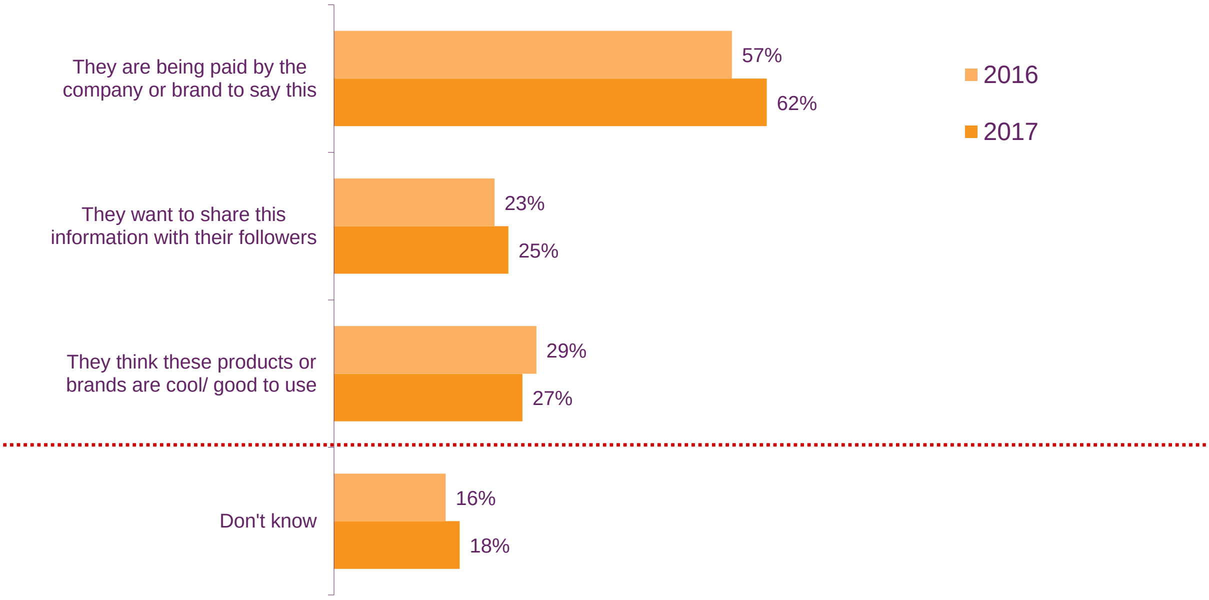
Most 12-15s who go online are aware of the potential for product endorsement by vloggers on sites like YouTube

Twelve to 15 year olds who go online were asked about vloggers endorsing or promoting brands on sites like YouTube. They were offered three choices of response and asked which of these might explain why vloggers might say favourable things about a particular product or brand[77].

Six in ten internet users aged 12-15 (62%) are aware that the vloggers might be being paid by the company to say favourable things, similar to the findings from 2016 (57%).

It's not possible to compare responses from 12-15s who say they watch videos on YouTube with those who do not, due to the low base size for the non-user group. While not shown in Figure 81, awareness of potential product endorsement by vloggers is higher among those who say they watch vloggers on YouTube (75%) compared to those who do not (54%). Those who watch vloggers are also more likely to say that the product endorsement could be because the vlogger thinks these products or brands are cool or are good to use (34% vs. 22%). These differences were also evident in 2016.

Figure 81: Understanding among 12-15s of potential product endorsement by vloggers: 2016 and 2017



QC37 - On sites like YouTube some vloggers with lots of followers like Zoella or Thatcher Joe might say good things about a particular company or product or brand, such as Nike clothing, a new game, or clothes from TopShop. Why do you think they might say good things about these products or brands? (prompted response, multi-coded).

Base: Children aged 12-15 who go online (475). Significance testing shows any change between 2016 and 2017.

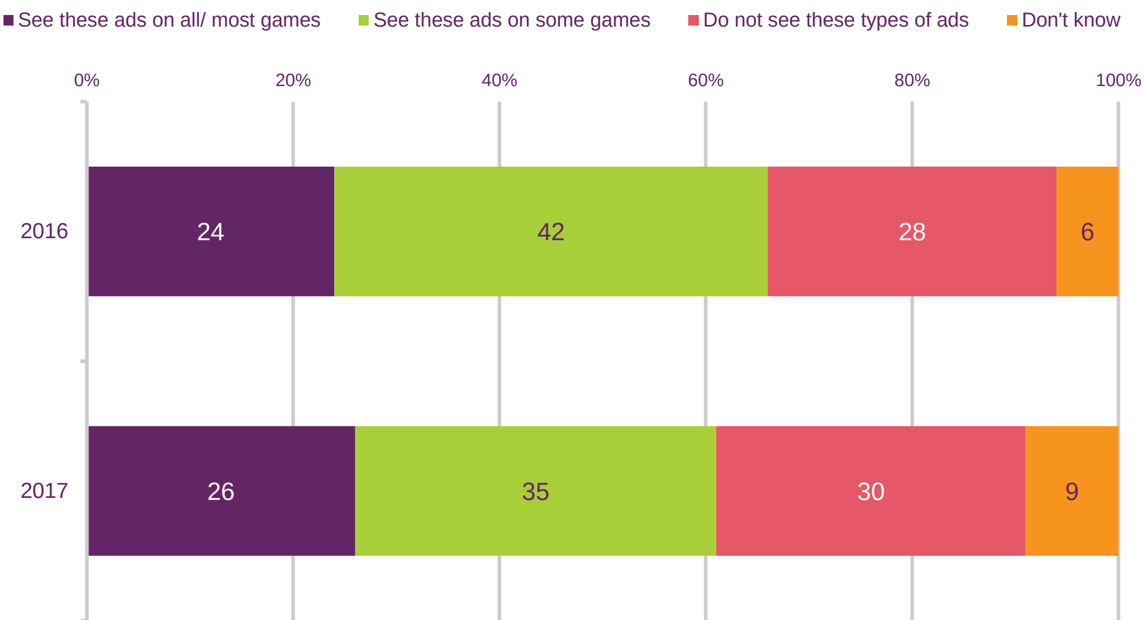
[77] The specific question stated: 'On sites like YouTube some vloggers with lots of followers like Zoella or Thatcher Joe might say good things about a particular company or product or brand, such as Nike clothing, a new game, or clothes from TopShop. Why do you think they might say good things about these products or brands?'

One in four 12-15s who play games say they see 'pay-to-win' advertising in all or most games they play

Children aged 12-15 who play games on any type of device were asked whether they ever see any in-game advertising that encourages them to 'pay to win'. This type of advertising promotes spending money in order to get further ahead in the game, by clearing a level, or buying more powers or abilities, or by prolonging life in a game.

Six in ten 12-15s say they are aware of this type of advertising (61%), with a quarter saying they see these type of ads on all or most games (26%) and around one-third (35%) in some games. All of these measures are unchanged since 2016.

Figure 82: Awareness among 12-15s of exposure to in-game advertising which promotes access to advanced features/ 'pay-to-win': 2016 and 2017



QC46 – When you play games do you ever see adverts or screens appearing within the game that give you the chance to spend money to allow you to do get further ahead in the game? IF NECESSARY -Through spending money it might make it easier to win the game, to clear a level, to progress to the next level or to buy more powers or abilities or to prolong your life in the game. Would you say you see these sorts of ads on all games, most games, or just some games that you play? (prompted responses, single coded).

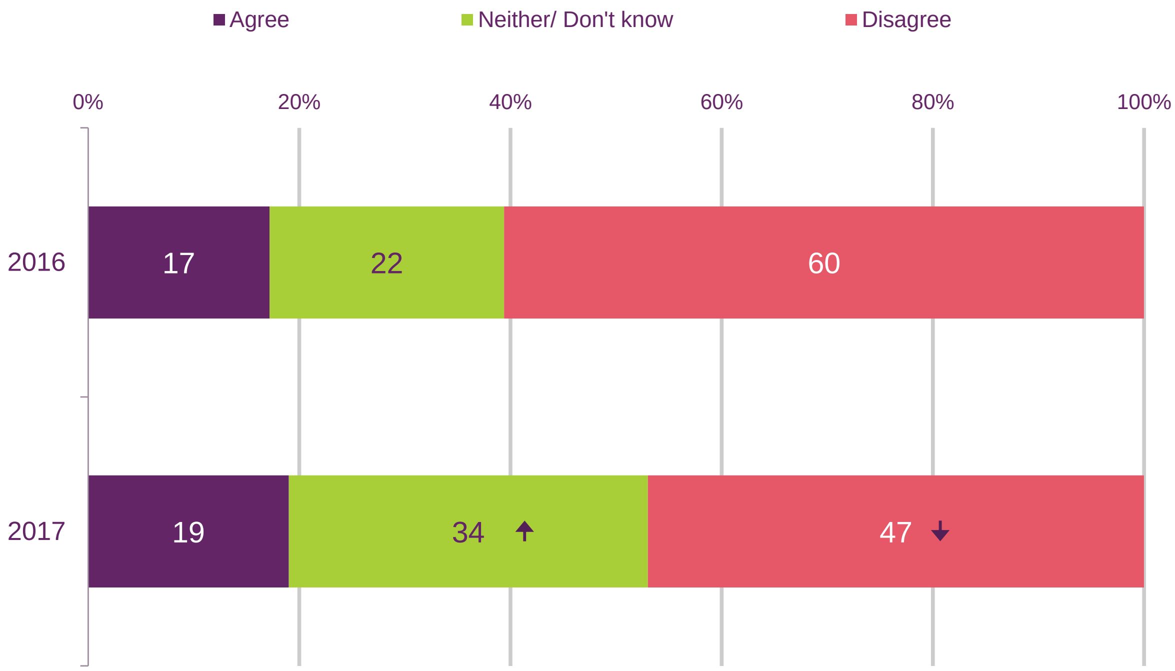
Base: Children aged 12-15 who ever play games at home or elsewhere (369). Significance testing shows any change between 2016 and 2017.

Attitudes towards providing personal details online

Children aged 12-15 are more likely to disagree than to agree that they will give personal details online to be able to get something they want

As shown in Figure 83, close to one in five (19%) children aged 12-15 who go online agree with the statement: 'I will give details about myself to a website or app to be able to get something that I want'. This response is broadly half as likely as disagreement with this statement (47%). The remaining proportion (34%) are neutral or unsure. Compared to 2016, there is no change in the proportion who agree that they give details online to get what they want. However, fewer now disagree with the statement (47% vs. 60% in 2016) and more are now neutral or unsure (34% vs. 22% in 2016).

Figure 83: Agreement among 12-15s with the statement "I will give details about myself to a website or app to be able to get something that I want": 2016 and 2017



QC29A - I'm going to read out some things about being online, for each one please say which of the options on the card applies to you – I will give details about myself to a website or app to be able to get something that I want. (prompted responses, single coded).

Base: Children aged 12-15 who go online (475). Significance testing shows any change between 2016 and 2017

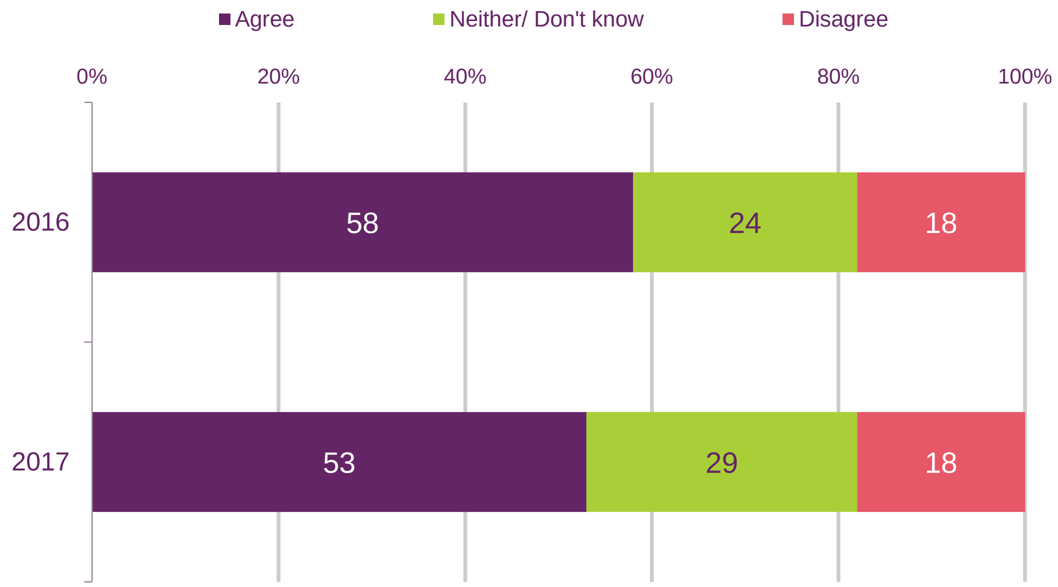
More than half of 12-15s who go online say they can delete information they have posted online if they decide they don't want it to be seen

In 2017, 12-15s who go online were asked about their attitudes towards how they use their personal information.

As shown in Figure 84, a majority of 12-15s (53%) agree with the statement: 'I can easily delete information that I have posted about myself online if I don't want people to see it'. Around one in five (18%) disagree and three in ten (29%) are neutral or unsure.

Each of these responses are unchanged compared to last year.

Figure 84: Agreement among 12-15s with the statement "I can easily delete information that I have posted about myself online if I don't want people to see it": 2016 and 2017



QC29B - I'm going to read out some things about being online, for each one please say which of these applies to you – I can easily delete information that I have posted about myself online if I don't want people to see it.

Base: Children aged 12-15 who go online (475).

Understanding of how the BBC, Google and YouTube are funded

12-15s are more likely to understand how Google and YouTube are funded, compared to the BBC

Questions were added to the study in 2016 in order to assess children's understanding of how certain organisations are funded (the BBC, Google and YouTube).

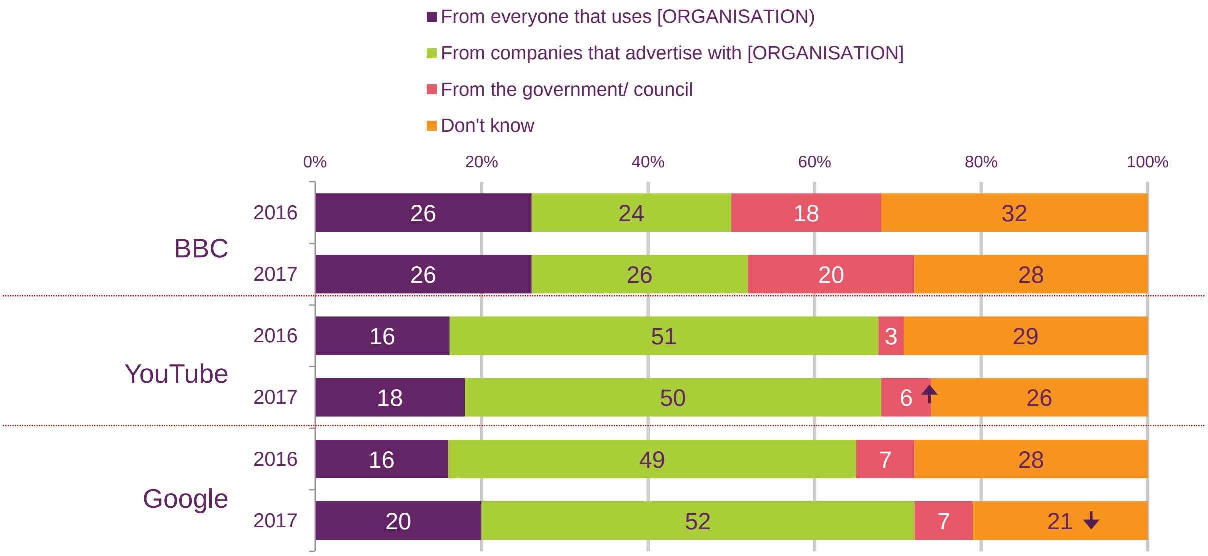
Children aged 12-15 who watch TV were asked: "Where do you think the BBC mainly gets its money from?". Children aged 12-15 who say they ever use YouTube were asked "Where do you think YouTube mainly gets its money from?". Children aged 12-15s who go online and say they ever use search engines were asked "Where do you think Google mainly gets its money from?". At each of these questions, respondents were prompted with the same four possible response options. The results from both 2016 and 2017 are shown in Figure 85.

Around a quarter of 12-15s were unsure how the BBC (28%) and YouTube (26%) were funded, as in 2016. Search engine users were relatively less likely to be unsure how Google is mainly funded (21%); less likely than in 2016 (28%)

When asked about the BBC, one in four 12-15s who watch TV (26%) gave the correct response that it was from everyone who uses the BBC, while the same proportion (26%) felt it was from companies that advertise with the BBC. Fewer 12-15s said it was from the Government or council (20%). All of these measures relating to BBC funding are unchanged since 2016.

Results are very similar across YouTube and search engine users. Around half of 12-15s gave the correct response that companies pay to advertise on YouTube (50%) and on Google (52%). These correct responses are unchanged since 2016.

Figure 85: Understanding of how BBC/ Google/ YouTube are funded, among users aged 12-15: 2016 and 2017



QC5/ QC9/ QC27 – Where do you think the BBC/ YouTube/ Google mainly gets its money from? (prompted responses, single coded).

Base: Children aged 12-15 who watch TV at home or elsewhere (467)/ Children aged 12-15 who use the YouTube website or app (427) / Children aged 12-15 who go online and use search engine websites or apps (432). Significance testing shows any change between 2016 and 2017

Differences by gender and socio-economic group

Girls aged 12-15 are more likely than boys to be unsure about personalised advertising and YouTube funding

There are some differences by gender in children's knowledge and understanding of their media environment.

While neither boys nor girls aged 12-15 are more likely to be aware of personalised advertising, girls are more likely than boys to say they are unsure (31% vs. 18%).

Neither boys nor girls aged 12-15 are more likely to give the correct response about how the BBC, YouTube and Google are funded, but girls are more likely than boys to be unsure about funding for YouTube (31% girls unsure vs. 21% boys).

Children aged 8-15 in AB households are more likely to be aware of how sponsored links can appear in search engine results

There are some differences in knowledge and understanding of media by household socio-economic group.

Compared to the average for 8-15s, those in AB households are more likely to identify sponsored links in search engine results by stating the correct answer: that the first two results they were shown for the Google search for children's trainers were adverts (45% vs. 36%). Children in DE households are less likely to give this correct answer compared to the average for 8-15s (28% vs. 36%).

While no particular socio-economic group is more likely to give the correct response about how the BBC, YouTube and Google are funded, children aged 12-15 in C2DE[78] households are more likely than those in ABC1 households to be unsure about funding for the BBC (32% C2DE unsure vs. 25% ABC1) and for YouTube (30% C2DE unsure vs. 22% ABC1).

[78] As these questions were asked of users of search engines, YouTube and those who watch television, it was not always possible to analyse by all four socio-economic groups compared to the average.

13. Children's negative experiences and risky behaviour

This section looks at some of the negative aspects of going online that children may have experienced, as well as some of the risky behaviour they may exhibit online.

It starts by looking at children's awareness of how to stay safe online and their use of online safety measures. This is followed by looking at their experience of negative events online, such as their exposure to 'worrying or nasty' and 'hateful' content, and their awareness of online reporting tools.

It also looks at their experience of being bullied, both online and in person. It explores some of the riskier activities that children may have carried out or be aware of, such as sending information to people they have only had contact with online, and using proxy servers.

It concludes by addressing children's attitudes towards the internet in terms of their perceptions of whether people behave differently online, whether it is important to protect users from hurtful comments online, and their belief in the importance of keeping their online information private. It also looks at their perception of the pressures to appear popular online, and the extent to which social media users and online gamers feel that people are mean to each other.

In 2017, for the first time, children were allowed to opt in to completing the relevant section about bullying and their exposure to online risk, and were also given the option of completing these questions directly through the interviewer's CAPI unit/ tablet[79]. This was to allow children to feel as comfortable as possible in responding to these questions. More detail about this approach is provided later in this section.

Key findings

- Nearly all internet users aged 8-11 (97%) and 12-15 (97%) recall being told about how to use the internet safely. Both 8-11s and 12-15s are most likely to say they have been given this information or advice from a parent (86% for 8-11s and 83% for 12-15s) or from a teacher (75% for 8-11s and 79% for 12-15s).
- More than half of 12-15s who go online (opting to answer the question[80]) say they know how to block messages on social media from someone they don't want to hear from (68%); about half (53%) had done this. Less than half (47%) know how to change the settings so fewer people can view their social media profile; a third (33%) have ever done this.

[79] The survey with both the parent and child is administered through a Computer Assisted Personal Interviewing (CAPI) methodology with the CAPI software loaded onto a tablet for the interviewer to complete.
[80] These children were given the option of not completing this section of the questionnaire if they did not feel comfortable doing so. Overall, 87% of 8-11s and 91% of 12-15s opted to complete the section.

- Close to one in five children aged 8-11 (17%) who go online say they have ever seen something online that they found worrying or nasty; 12-15s are more likely to say this (29%). Nearly all 8-11s (95%) and nine in ten 12-15s (90%) say they would tell someone if they saw something like this online. This incidence is unchanged since last year for 8-11s and is less likely for 12-15s (90% vs. 94%).
- Three-quarters of 12-15s who go online are aware of online reporting functions (74%) and one in eight (12%) have ever reported something they have seen online that they considered to be worrying or nasty.
- More than two in five 12-15s who go online (46%) say they have seen something hateful about a particular group online in the last 12 months, up since 2016 (34%). A third of 12-15s (37%) who have seen hateful content online in the past year said they took some action in response, while three in five (60%) ignored it.
- A quarter of 12-15s (23%) who opted to answer the question say they have ever been contacted online by someone they don't know, and one in ten (9%) say they have ever seen something of a sexual nature that made them feel uncomfortable, either online or on their mobile phone.
- Around one in eight 8-11s (12%) and one in five 12-15s (20%) who opted to answer the question say they have ever personally experienced some form of bullying. One in eight 12-15s say they have been bullied either face to face (12%), or on social media (12%); this is lower for 8-11s (6% and 1% respectively).
- More than half (57%) of children aged 12-15 who go online (opting to answer the question) say they know how to do any of the four 'risky' measures they were asked about, and close to two in five (37%) have ever done any of them. One in four (27%) say they have ever deleted the history records of the websites they have visited, and one in five (20%) have ever used a browser in privacy mode. Less than one in ten say they have ever unset any filters that prevent websites being visited (6%) or used a proxy server (3%).
- Compared to 2016, 12-15s who go online are less likely to say that they agree that most people behave in a different way online than when they talk to people face to face (67% vs. 74%). Seven in ten (72%) agree that there should be rules about what can be said online, so that people can't say hurtful things about others.
- One in eight 12-15s with a social media profile (13%) agree that getting likes or followers is more important to them than keeping their posts, comments or photos private. An identical proportion (13%) feel there is pressure to look popular on social media 'all the time'.

Differences by gender

- Among 12-15s opting to answer the question, girls are more likely than boys to say they have been contacted online by someone not known to them who wants to be their friend (27% vs. 18%).
- Boys aged 8-11 who go online are more likely than girls to say they have seen something online that they considered worrying or nasty (21% vs. 13%).

- Girls aged 12-15 are more likely than boys to agree that "I think there should be rules about what people can say online so that people can't say hurtful things to others" (77% vs. 68%).

Differences by household socio-economic group

- While there are no differences by household socio-economic group in having seen hate speech online in the past 12 months (44% for 12-15s in ABC1 households vs. 46% for those in C2DE households), those in ABC1 households are more likely to say they have *often* seen this (11% vs. 6%).

Knowledge about using the internet safely

Nearly all internet users aged 8-15 say they have been told about how to use the internet safely

Children aged 8-15 who go online were asked whether they had ever been told about how to use the internet safely[81]. Nearly all children aged 8-11 (97%) or 12-15 (97%) recalled being told about this.

Those who said they had been told were asked who had told them. Children aged 8-11 or 12-15 are most likely to recall receiving the information from a parent (86% for 8-11s and 83% for 12-15s) or from a teacher (75% for 8-11s and 79% for 12-15s).

Around one in five 8-15s, or less, mention receiving this information from any other source. Four sources are more likely to be mentioned by 12-15s than by 8-11s: other family members (22% for 12-15s vs. 17% for 8-11s), friends (21% vs. 11%), TV/ radio programmes (7% vs. 3%) and websites (10% vs. 4%).

Although the question wording changed between 2016 and 2017 it is interesting to note that 8-11s are more likely to say they have been told about how to use the internet safely (97%) than they are to have been told about how being online can sometimes be risky or dangerous (the question wording in 2016) (92%), and to recall being told about this by a parent (86% vs. 73% in 2016) or a teacher (75% vs. 62%). Compared to last year, children aged 12-15 are more likely to say they have received information or advice from a teacher (79% vs. 68%). They are also more likely to say they have received it from other family members (22% vs. 15%) or from websites (10% vs. 5%).

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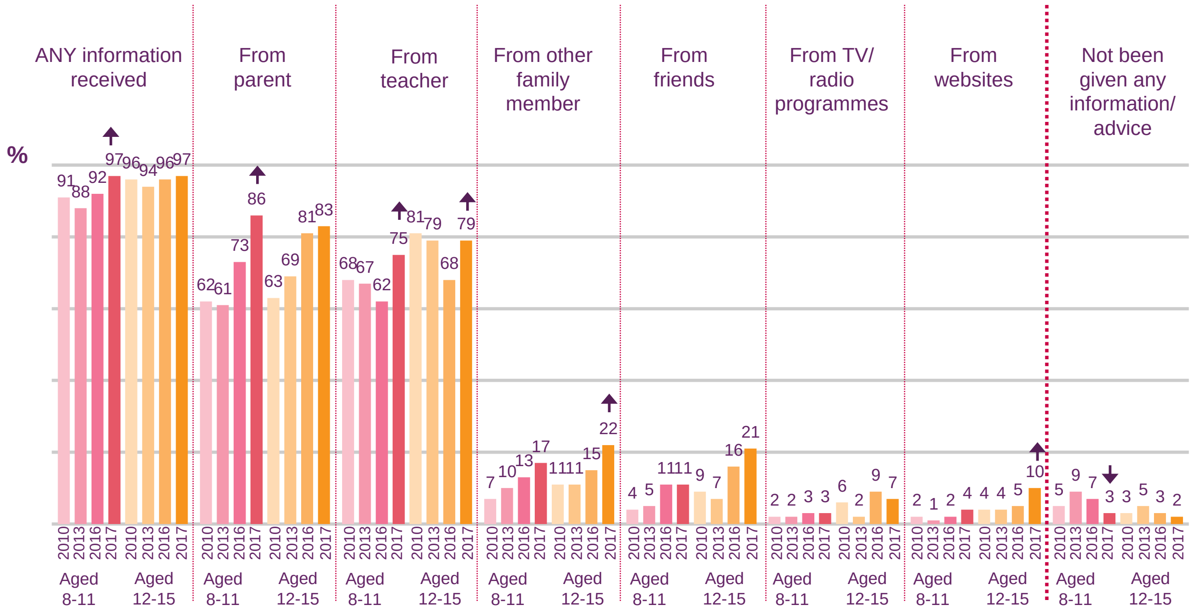
[81] In 2016 this question referred to whether the child had ever been told about how being online can sometimes be a bit risky or dangerous. Before 2014, this question referred to being given any information or advice about how to stay safe when they are online. These amendments may have affected the reported trend.

Figure 86: Children stating they have been given any information or advice about how to use the internet safely, among those who go online at home (2010, 2013) or elsewhere (2016, 2017), by age



QC34 – Has anyone ever told you about how to use the internet safely (2017)/ Has anyone ever told you about how being online can sometimes be a bit risky or dangerous? (2016)/ Have you ever been given any information or advice about the risks of being online (2015)/ risks while you are online (2014)/ how to stay safe when you are online (2010-2012)? (Unprompted responses, multi-coded) Showing responses from more than 2% of all 8-15s who go online

Base: Children aged 8-15 who go online at home or elsewhere (463 aged 8-11, 475 aged 12-15)

Significance testing shows any change between 2016 and 2017.

In 2017 children aged 8-15 were given the opportunity to opt in to complete a series of questions about some of the more difficult issues that they might have ever encountered; for example, questions relating to their experience of being bullied, and their knowledge and experience or risky (and safe) online behaviour. In addition to being asked whether they wanted to answer these questions, they were asked whether they would prefer to respond directly using the interviewer's tablet[82], without any interviewer assistance, or whether they would prefer to complete the relevant questions with the interviewer's help. The purpose of this amended approach is twofold: firstly, to ensure that children felt comfortable responding about their more difficult experiences, and also to allow them to respond more privately, and therefore minimize any under-reporting that might occur due to the presence of the parent or adult interviewer.

Overall, 87% of 8-11s and 91% of 12-15s opted to respond to these questions. Close to half of 8-11s (46%) and seven in ten 12-15s (72%) opted to respond directly using the interviewer's tablet, with the remainder responding with the assistance of the interviewer.

[82] The survey with both the parent and child is administered through a computer-assisted personal interviewing (CAPI) methodology, with the CAPI software loaded onto a tablet for the interviewer to complete.

Given this change in approach, it is not appropriate to comment on any differences in the results compared to last year.

Where the data was collected in this way, the base will be flagged as a proportion of 'children opting to answer the question'. This applies for each of the following figures in this section: Figure 87, Figure 93, Figure 94, Figure 95 and Figure 96.

Half of 12-15s have ever blocked messages on social media from someone they don't want to hear from

Children aged 12-15 who go online who opted to answer the question were prompted with a list of online activities and were asked to say whether they knew how to do any of them, and whether they had ever done any of them[83]. Figure 87 shows those activities that were asked about which can be grouped under the heading of 'safe' behaviour.

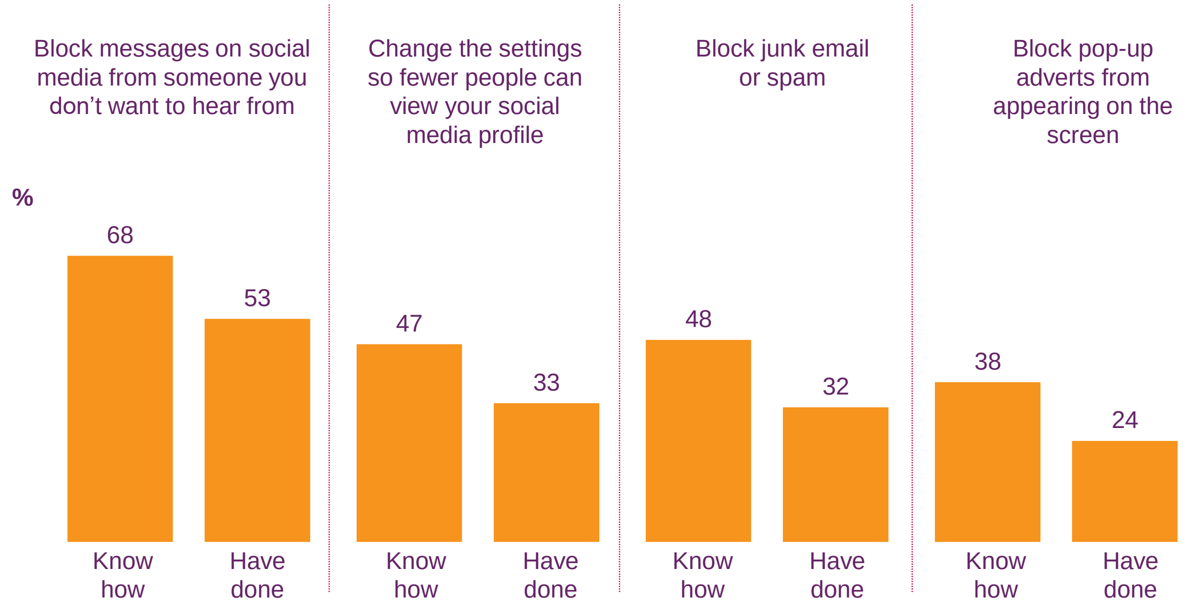
Two-thirds of 12-15s who go online (who opted to answer the question) say they know how to block messages on social media from someone they don't want to hear from (68%), with more than half having ever done this (53%).

Around half say they know how to change the settings so fewer people can view their social media profile (47%) or know how to block junk email or spam (48%) with a similar proportion (one–third) having ever done either of these things.

Close to four in ten say they can block pop-up adverts from appearing on-screen (38%); a quarter (24%) have done this.

[83]In previous years children were asked about whether they had ever done them in the last 12 months, which was amended to whether they had 'ever' done them. It is not therefore possible to show a trend.

Figure 87: Experience of 'safe' online measures among children aged 12-15: 2017



QC57/ QC58– Do you know how to do any of these things online?/ This list shows the things the you just said you know how to do online. If you have ever done any of them please choose them again (prompted responses, multi coded)

Base: Children aged 12-15 who go online who opted to answer the question (436).

Experience of worrying or nasty online content

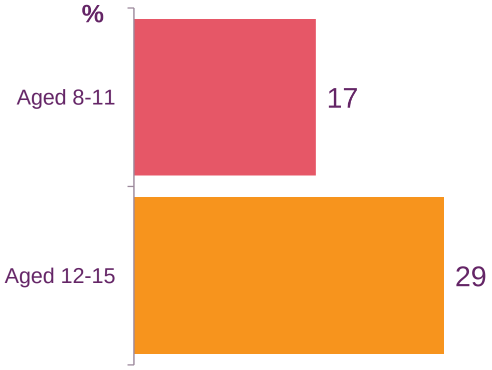
Three in ten 12-15s and one in six 8-11s who go online say they have ever seen online content that they found worrying or nasty

Children aged 8-11 and 12-15 who go online were asked whether they had ever[84] seen anything online that was worrying or nasty in some way that they didn't like, as shown in Figure 88.

One in six of the 8-11s (17%) said they had ever seen something online that was worrying or nasty, with 12-15s more likely to say this (29%).

[84] In previous years, children were asked whether they had seen anything in the past year. This was amended in 2017 to whether they had 'ever' seen anything. It is not therefore possible to show a trend.

Figure 88: Child's claimed experience of having ever seen any online content that they considered worrying or nasty that they didn't like, by age: 2017



QC31 – And, have you ever seen anything online that you found worrying or nasty in some way that you didn't like? (unprompted responses, single coded).

Base: Children aged 8-15 who go online (463 aged 8-11, 475 aged 12-15).

At least nine in ten of 8-11s and 12-15s who go online would tell someone if they saw something worrying or nasty online

Children aged 8-15 who go online were asked whether they would tell anyone if they saw something online that they found worrying or nasty in some way that they didn't like[85]. If they said they would tell someone, they were asked whom that person would be. The responses are shown in Figure 89.

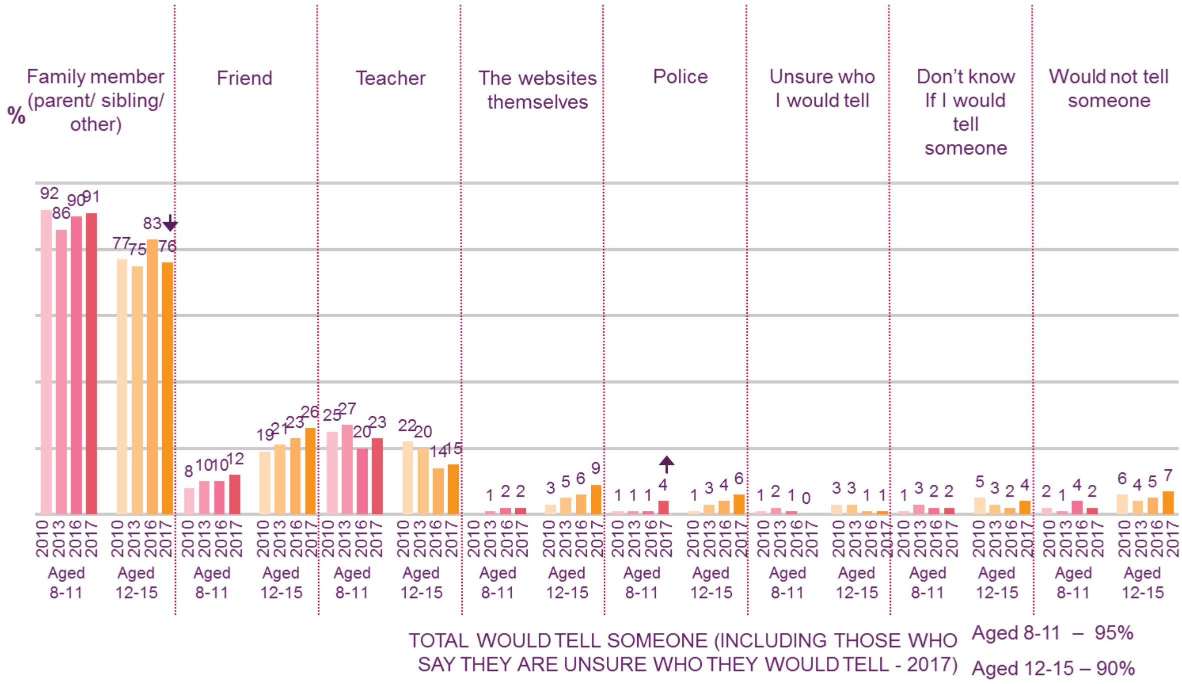
Eight to 11 year olds (95%) are more likely than 12-15s (90%) to say they would tell someone[86]. The majority of both age groups would tell a family member (parent/ sibling or other family member), with younger children more likely than older children to do this (91% vs. 76%). Younger children would also be more likely to tell a teacher (23% vs. 15%). Twelve to 15 year-olds would be more likely than 8-11s to tell a friend (26% vs. 12%) or the website (9% vs. 2%).

Less than one in ten children aged 12-15 (7%) and 8-11 (2%) say they would not tell anyone if they saw something online that they found worrying or nasty.

Compared to 2016, 12-15s are less likely to say they would tell someone (90% vs. 94%) and are less likely to say they would tell a family member (76% vs. 83%). While 8-11s are no more likely to say they would tell anyone, they are more likely to say they would tell the police (4% vs. 1%).

[85] Before 2016, this question referred to the child seeing something online they found 'worrying, nasty or offensive'; this change may affect the reported trend.
[86] Included in this group are the 1% of 8-11s and 12-15s who said they were unsure whom they would tell.

Figure 89: Reporting online content considered by the child to be worrying or nasty, by age: 2010, 2013, 2016, 2017



QC30 – When you go online to do things like visit websites or apps, play games online, watch TV programmes or video clips or visit social media sites, if you saw something online that you found worrying or nasty in some way that you didn't like, would you tell someone about it? IF YES – Who would you tell? (Shows unprompted responses from >2% of all internet users aged 8-15) (unprompted responses, multi-coded).

Base: Children aged 8-15 who go online (463 aged 8-11, 475 aged 12-15). Significance testing shows any change between 2016 and 2017.

Three-quarters of 12-15s who go online say they are aware of online reporting facilities

Children aged 12-15 who go online were asked a series of questions, in order to understand their awareness and use of online reporting facilities.

They were told that "many websites, apps and online games have a report function[87] so that you can let them know if you see something that is worrying or nasty" and were then asked whether they were aware of this. Those who had said they had seen something worrying or nasty (as shown in Figure 88) and who were aware of the reporting function were then asked whether they had ever reported this content using the report function. The results are shown in Figure 90, expressed as a proportion of all 12-15s who go online.

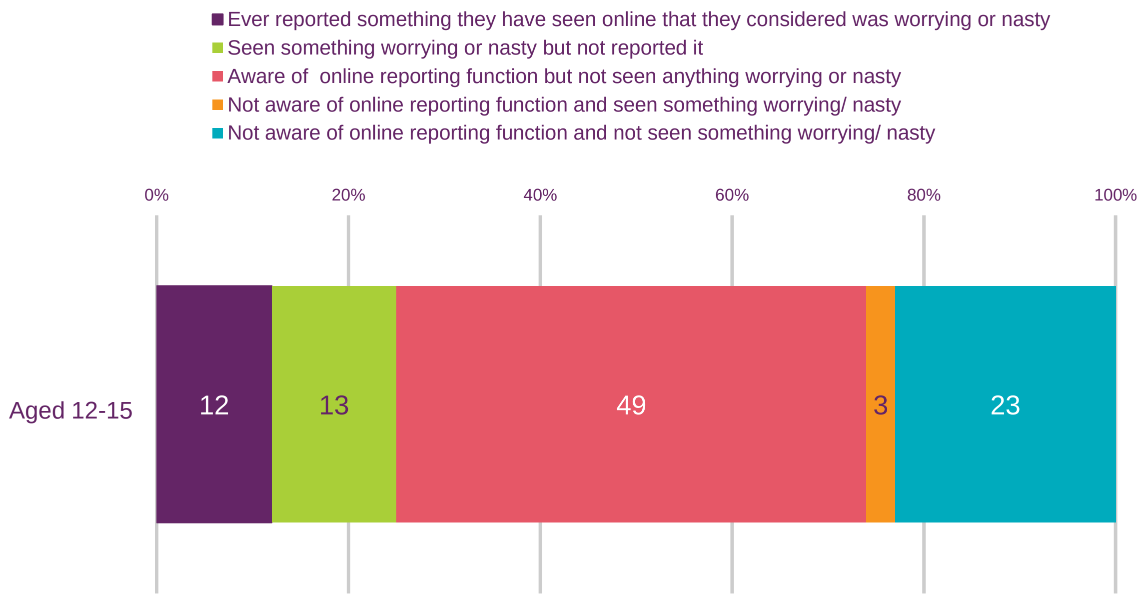
Overall, three-quarters of 12-15s (74%) are aware of the online reporting function. Around one in eight 12-15s who go online (12%) say they have ever reported something they have seen online that

[87] The following definition of the report function was read out to children, if required: 'The report function could be a button, a link, an email address or online form through which you can point out the worrying or nasty content'.

they considered worrying or nasty, with a similar proportion stating that although they had seen something like this, they had not reported it (13%). Half of 12-15s (49%) are aware of the online reporting function but have not seen anything worrying or nasty online.

Three per cent of 12-15s have seen something worrying or nasty online, and are unaware of the online reporting function.

Figure 90: Awareness and use of online reporting function for worrying or nasty online content, among 12-15s: 2017



QC32/ QC33 – Did you know that many websites, apps and online games have a report function so that you can let them know if you see something worrying or nasty?

IF NECESSARY: The report function could be a button, a link, an email address or online form through which you can point out the worrying or nasty content/ Have you ever used this report function to report what you saw online that you found worrying or nasty? (unprompted responses, single coded).

Base: Children aged 12-15 who go online (475).

Children aged 12-15s' experience of hateful content online

More than two in five 12-15s who use the internet say they have seen something hateful online in the past 12 months – an increase since 2016

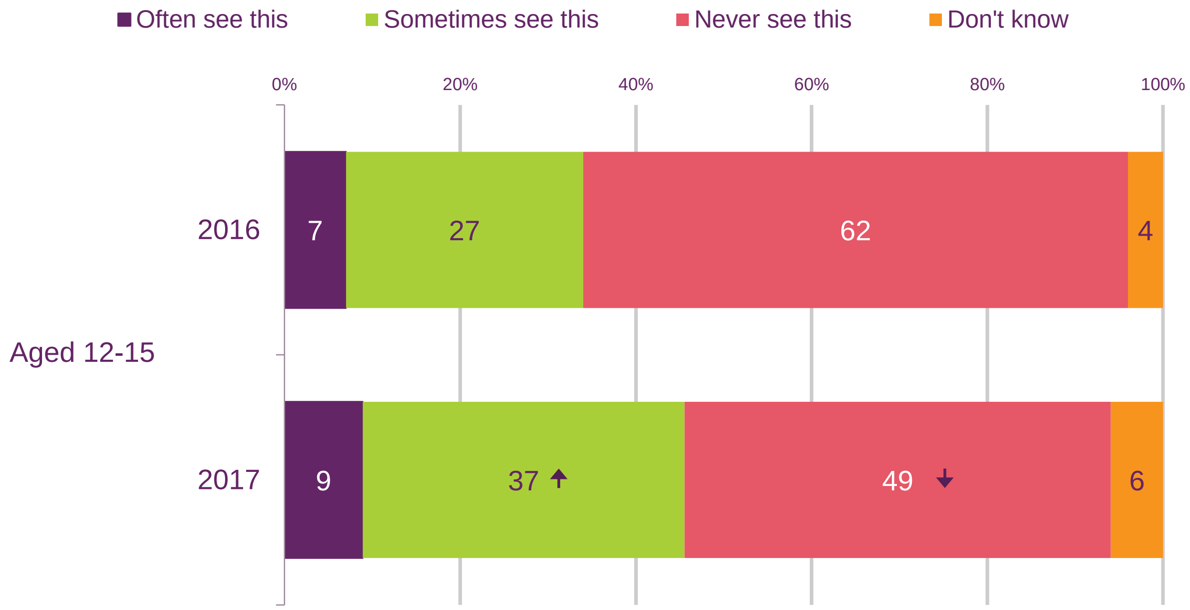
Since 2016, in order to better understand children's exposure to hate speech online, 12-15s who go online have been asked the following question: "In the past year, have you seen anything hateful on the internet that has been directed at a particular group of people, based on, for instance, their gender, religion, disability, sexuality or gender identity? Examples of these sorts of things might be nasty or hateful comments or images that have been posted on social media, comments in response to an article that you read online, or videos posted on sites like YouTube". The results are shown in

Figure 91, for all 12-15s who go online.

In 2017, more than two in five of 12-15s say they have seen this kind of hateful content online in the past year (45%). Less than one in ten (9%) say they 'often' see this, with the remaining 37% saying they 'sometimes' see it.

Compared to 2016, 12-15s are more likely to have seen hateful content online (45% vs. 34%); this increase is attributable to children saying they are more likely to 'sometimes' see this (37% vs. 27%).

Figure 91: Internet users aged 12-15 who say they have encountered hateful content online in the past 12 months: 2016, 2017



QC59– In the past year have you seen anything hateful on the internet that has been directed at a particular group of people, based on for instance their gender, religion, disability, sexuality or gender identity? Examples of these sorts of things might be nasty or hateful comments or images that have been posted on social media, comments in response to an article that you read online, or videos posted on sites like YouTube (prompted responses, single coded).

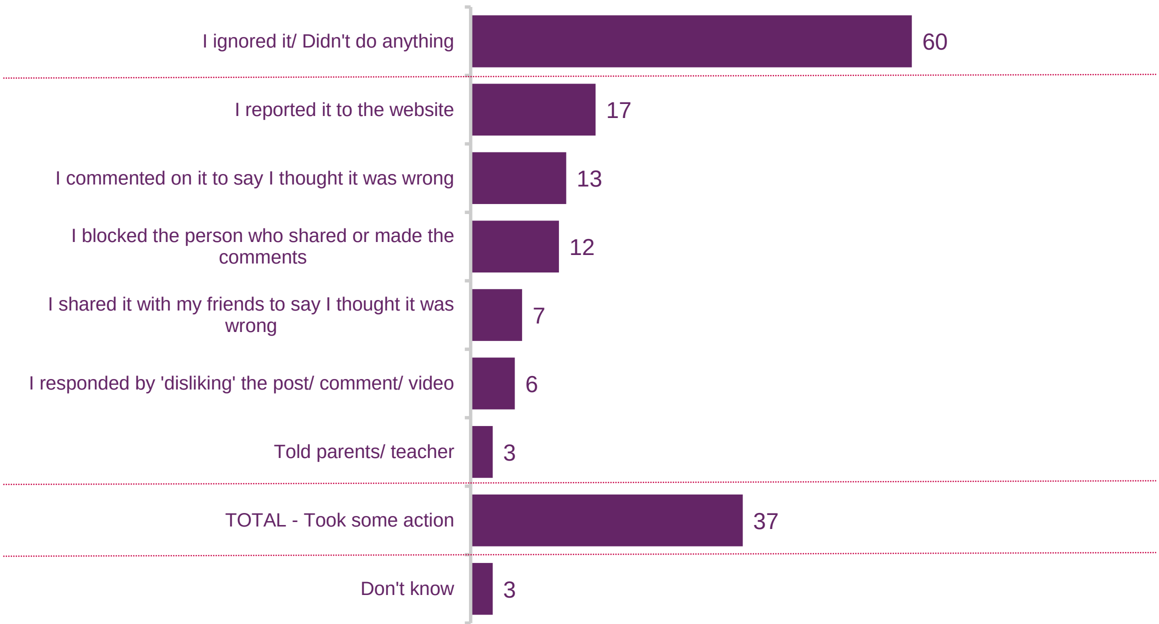
Base: Children aged 12-15 who go online (475). Significance testing shows any change between 2016 and 2017

Around a third of those 12-15s who have seen hateful content online in the past year say they took action in response

In 2017, 12-15s who said they had seen hateful content online in the past year were prompted with some possible actions and were asked what, if anything, they did as a result, the last time they saw something hateful online.

Three in five of these 12-15s (60%) said they ignored it, or didn't do anything. Around a third (37%) took some sort of action as a result of viewing this content. Seventeen per cent say they reported it to the website, while around one in eight say they either commented on the content to say it was wrong (13%) or blocked the person who made or shared the comments (12%). Less than one in ten say they shared it with friends and highlighted that they thought it was wrong (7%) and a similar proportion say they 'disliked the post or comment or video' (6%). Three per cent told their parents or a teacher.

Figure 92: Actions taken as a result of seeing hateful content online among 12-15s: 2017



QC60 – What if anything did you do after you saw the most recent example of something hateful online? (prompted responses, multi coded).

Base: Children aged 12-15 who have ever seen hate speech online (205).

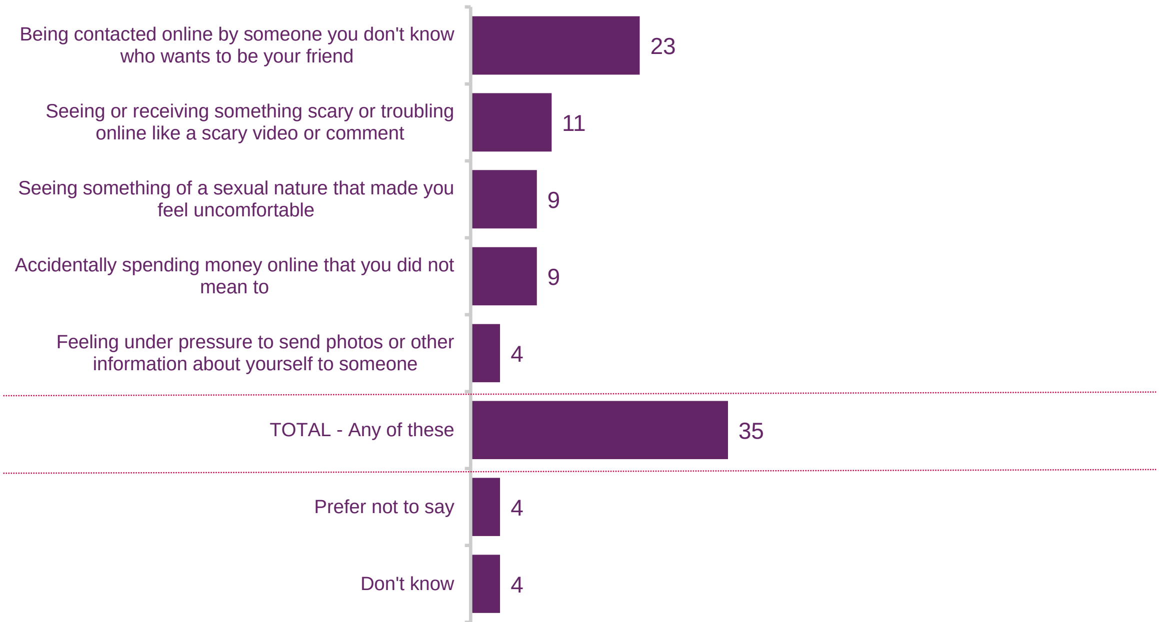
Children aged 12-15s' negative online experiences

One in ten 12-15s say they have ever seen something of a sexual nature online or on a mobile phone

Children aged 12-15 who opted to answer the question were asked whether they had ever[88] personally experienced, online or through a mobile phone, any of a range of negative experiences[89]. The responses are shown in Figure 93. Around one in three children aged 12-15 (35%) said they had ever had any of the five negative experiences they were asked about.

Close to a quarter of 12-15s (23%) say they have ever been contacted online by someone they don't know who wants to be their friend. One in ten have either seen or received something scary or troubling online, like a scary video or comment (11%), seen something of a sexual nature that made them feel uncomfortable (9%), or have accidentally spent money online that they did not mean to (9%). Four per cent say they have ever felt under pressure to send photos or other information about themselves to someone.

Figure 93: Experience of negative types of online/ mobile phone activity, among children aged 12-15: 2017



QC56 – Please take a look at the list of things below and think about whether they have happened to you, either online or on a mobile phone (prompted responses, multi-coded).

Base: Children aged 12-15 who opted to answer the question (439).

[88] In previous years, children were asked about their experiences in the past 12 months rather than 'ever'. It is therefore not possible to show a trend for this question.
[89] The face-to-face nature of the survey and the sensitive topic may have resulted in some under-reporting in response to this question.

Around one in eight 8-11s and one in five 12-15s say they have ever experienced bullying

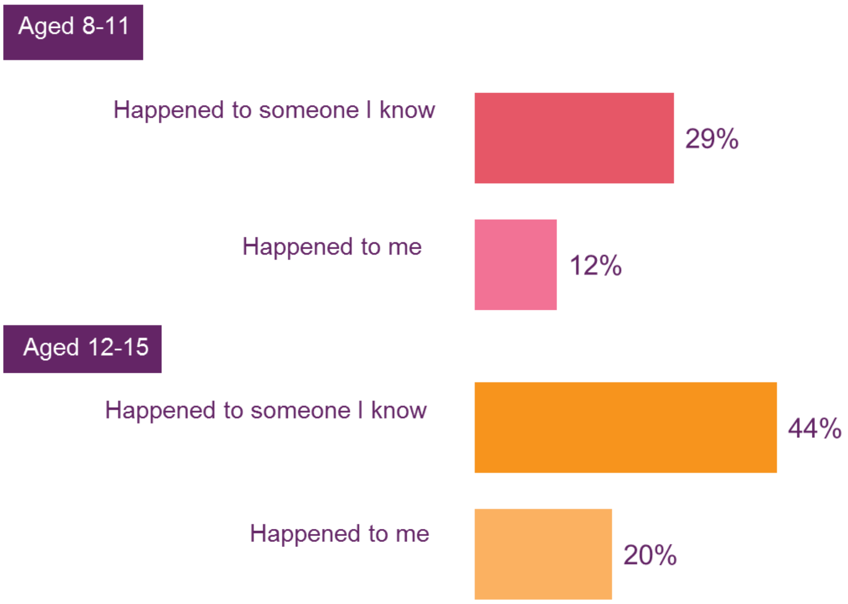
Children aged 8-11 and 12-15 who opted to answer the question were given the following description of behaviour that would commonly be described as bullying: 'People can be nasty or hurtful. It could be behind someone's back, to their face, through calls or texts. It could be being nasty through social media, games or other websites. It could be by calling people names, leaving them out, or through sharing photos or videos that upset them. It could be threatening to hurt or actually hurting them. It could be done on purpose or as a joke that goes too far.' They were then asked whether they knew of anyone who had ever experienced this, followed by whether they themselves had ever experienced this.

Figure 94 shows that in 2017 one in eight 8-11s (12%) and one-fifth of 12-15s (20%) say they have ever been bullied[90]. Children in both age groups are more than twice as likely to know of someone who has been bullied (29% for 8-11s and 44% for 12-15s).

The definition of bullying that has been read out to children was amended in 2016[91], as qualitative research[92] suggests that children may be less likely than adults to use the word 'bullying' for certain types of behaviour. We therefore amended the description to describe these behaviours without using the word 'bullying'.

[90] The face-to-face nature of the survey and the sensitive topic may have resulted in some under-reporting in response to this question.
[91] It is not, however, possible to show a trend due to the amends in methodology outlined earlier in this section. The focus of the question also shifted from asking about the child's experience in the past year to whether they had 'ever' experienced this type of bullying.
[92] See *Children's Media Lives: Year 2* Findings at http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/childrens/childrens_media_lives_year2/

Figure 94: Experience of being bullied, by age: 2017



QC53/ QC54 – (DESCRIPTION OF 'BULLYING' SHOWN TO CHILD ON TABLET SCREEN) Has this ever happened to anyone you know? / And has this ever happened to you? (prompted responses, single coded)

Base: Children aged 8-15 who opted to answer the question (429 aged 8-11, 439 aged 12-15).

One in eight 12-15s say they have been bullied on social media, which is as likely as face-to-face bullying

Children aged 8-11 and 12-15 who had ever experienced any type of bullying were then prompted with seven possible types of bullying and were asked which of them best described the ways in which somebody had been 'nasty' or 'hurtful' to them. The results are shown in Figure 95, expressed as a proportion of all children aged either 8-11 or 12-15 who opted to answer the question.[93]

Figure 95 shows that in 2017, around one in twenty 8-11s (6%) and twice as many 12-15s (12%) say they have been bullied in person/ face to face in the past year. A similar proportion of 12-15s (12%) say they have been bullied on social media, although this is much less likely for 8-11s (1%).

Compared to 12-15s, 8-11s are less likely to have been bullied via messaging apps or by text (2% vs. 5%), by photo message or video (1% vs. 4%) or via calls (1% vs. 4%).

Three per cent of 8-11s and 4% of 12-15s say they have been bullied through online games.

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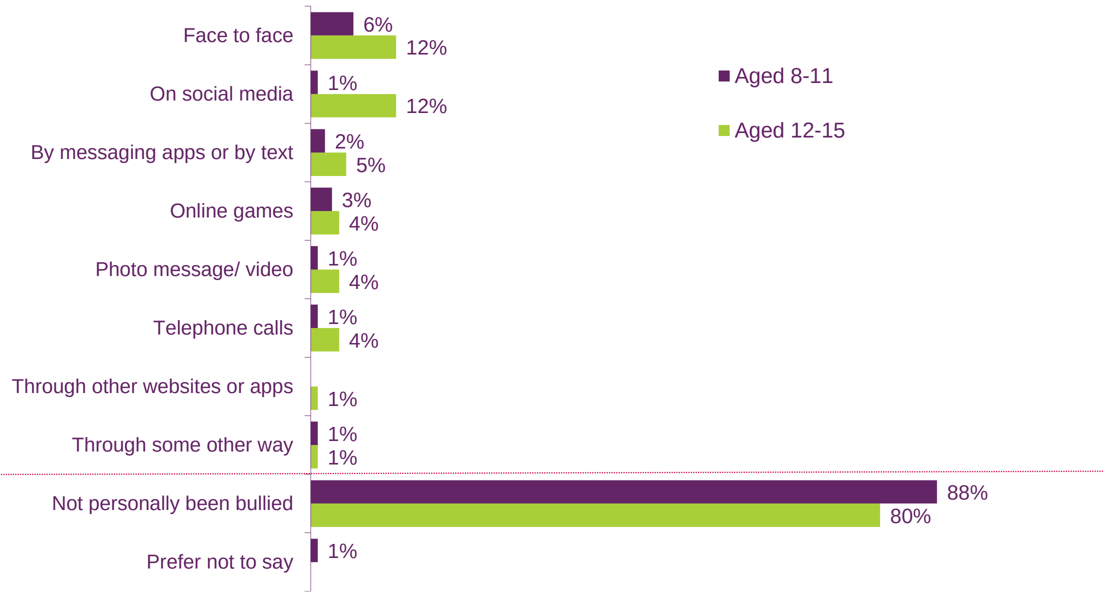
[93] It is not possible to express these incidences of bullying as a proportion of those that had been bullied, due to the low base size of 8-11s and 12-15s who had personally experienced any type of bullying.

Figure 95: Type of bullying experienced, by age: 2017



QC55 - When somebody was nasty or hurtful to you did it happen in any of these ways? (prompted responses, multi-coded).

Base: Children aged 8-15 who opted to answer the question (429 aged 8-11, 439 aged 12-15).

Potentially risky online behaviour

A quarter of 12-15s who go online have deleted the history records of websites they have visited, while one in five have used a web browser in privacy mode

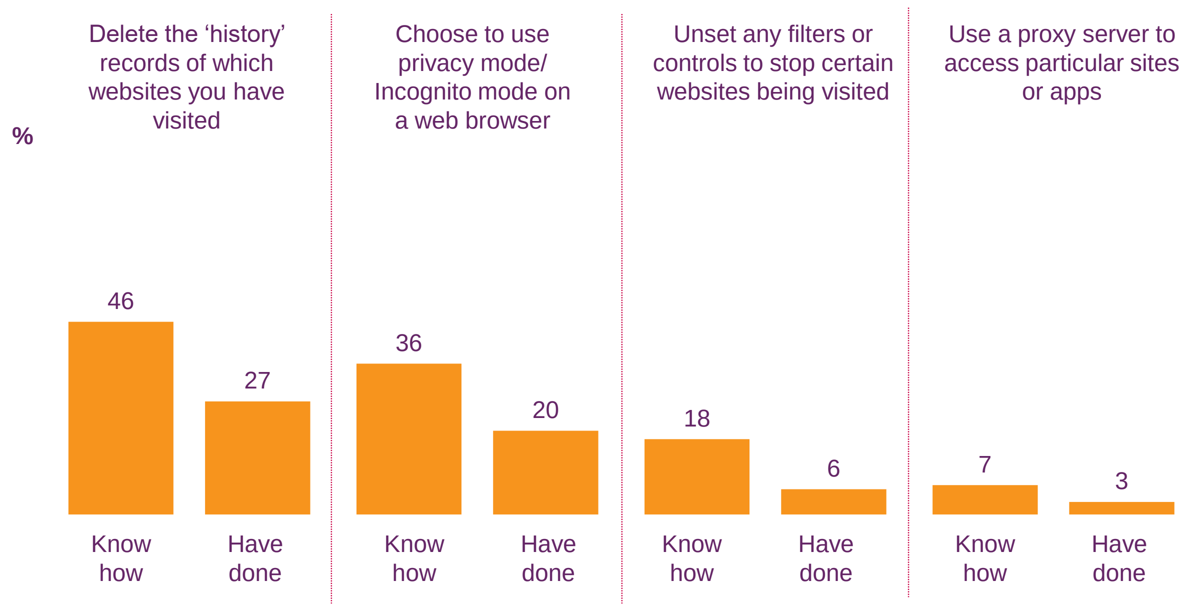
Children aged 12-15 who go online who opted to answer the question were prompted with a list of online actions and were asked to say whether they knew how to do any of them, and whether they had ever done them. Figure 96 shows the activities asked about which can be grouped under the heading of 'risky' behaviour.

Close to half of 12-15s (46%) say they know how to delete their browsing history; more than a quarter have ever done this (27%). More than one-third (36%) say they know how to choose to use a web browser in privacy mode, while around half of these (20%) have ever done this.

Fewer 12-15s say they know how to disable online filters or controls (18%) and only 6% say they have ever done it, while 7% know how to use a proxy server to access particular sites or app and around half of them have ever done it (3%).

Of the four 'risky' measures shown in Figure 96, more than half the children (57%) know how to do any of them, while around two in five (37%) have ever done any of them.

Figure 96: Experience of 'risky' online measures among children aged 12-15: 2017



QC57/ QC58– Do you know how to do any of these things online?/ This list shows the things the you just said you know how to do online. If you have ever done any of them, please choose them again. (prompted responses, multi-coded).

Base: Children aged 12-15 who go online who opted to answer the question (436).

Children's attitudes towards the internet

While two in three 12-15s believe that most people behave differently online, this is less likely than in 2016

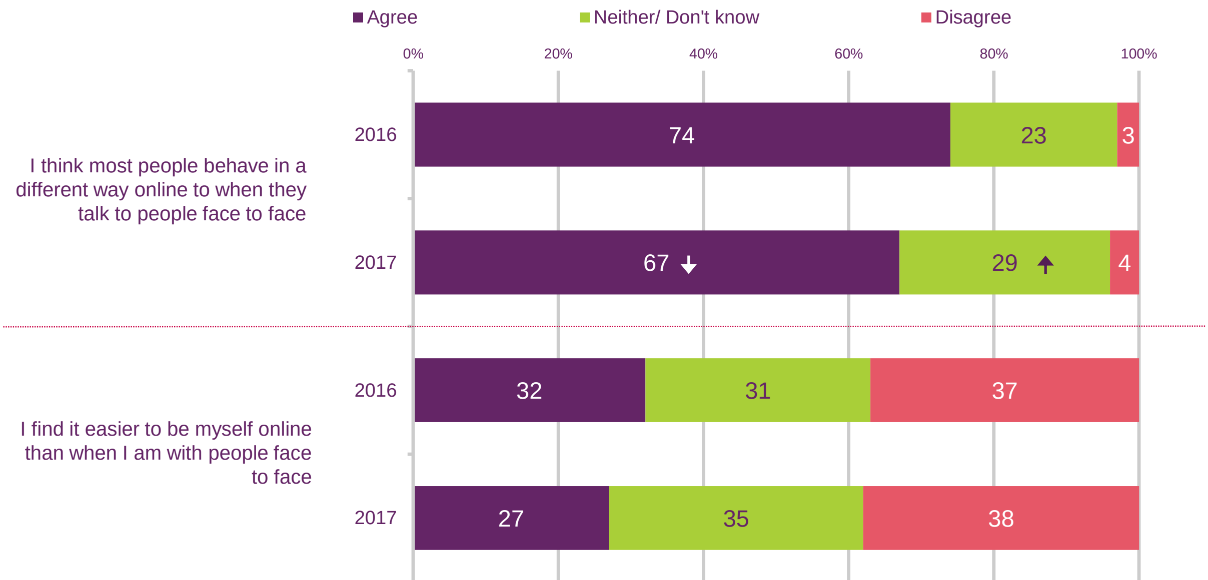
This section examines the attitudes of 12-15 year-olds towards going online.

Children aged 12-15 who go online were prompted with two statements about the internet and were asked how far they agreed or disagreed with each one. The responses are shown in Figure 97.

Two-thirds of 12-15s (67%) agree with: "I think most people behave in a different way online to when they talk to people face to face"; with less than one in 20 disagreeing (4%), and the remaining 29% neutral or unsure. Since 2016, 12-15s are less likely to agree with this statement (67% vs. 74%).

Children aged 12-15 who go online are more likely to disagree (38%) than to agree (27%) with the statement: "I find it easier to be myself online than when I am with people face to face"; with a third (35%) neutral or unsure. Each of these proportions are unchanged since 2016.

Figure 97: Agreement among 12-15s who go online with statements about the way people behave online: 2016 and 2017



QC38A/B– I'm going to read out some things about going online, for each one please say which of these applies to you (prompted responses, single coded).

Base: Children aged 12-15 who go online at home or elsewhere (475). Significance testing shows any change between 2016 and 2017.

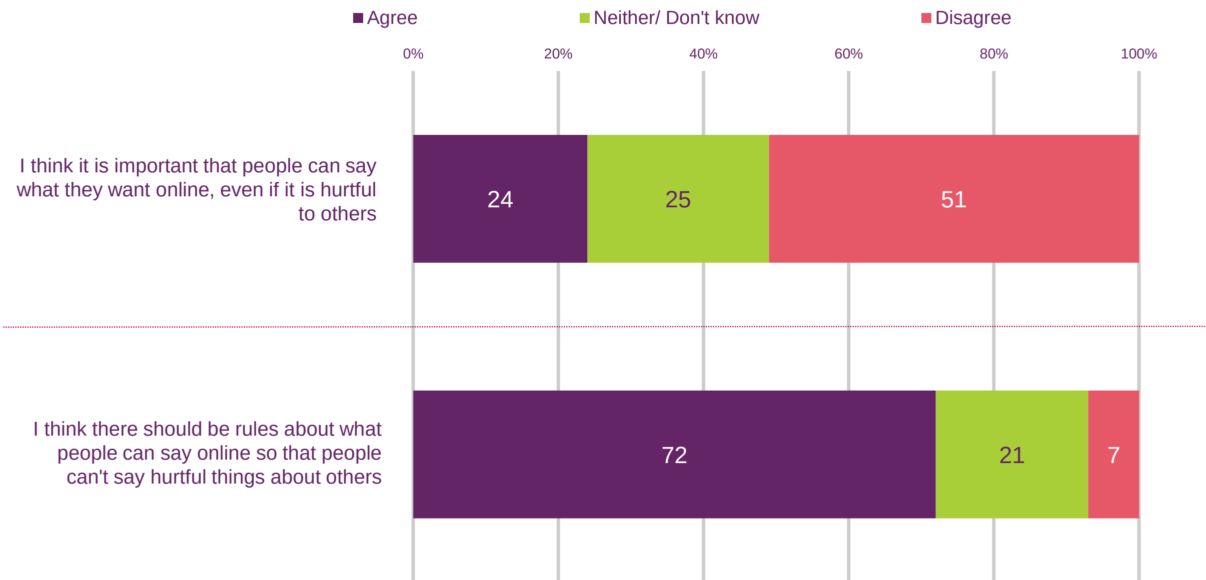
More than seven in ten 12-15s feel that there should be some form of regulation of hurtful comments online

In 2017, additional statements were added to the study to assess the extent to which children felt that people should be able to say whatever they liked online, or whether they felt there should be rules about what is and is not acceptable. The responses from 12-15s are shown in Figure 98.

Half of 12-15s who go online (51%) disagree with the statement: "I think it is important that people can say what they want online, even if it is hurtful to others"; twice as many as agree (24%).

Close to three-quarters of 12-15s (72%) agree with the statement: "I think there should be rules about what people can say online so that people can't say hurtful things about others"; while less than one in ten (7%) disagree.

Figure 98: Agreement among 12-15s who go online with statements about what people can and should say online: 2017



QC38C/D – I'm going to read out some things about going online, for each one please say which of these applies to you (prompted responses, single coded).

Base: Children aged 12-15 who go online at home or elsewhere (475).

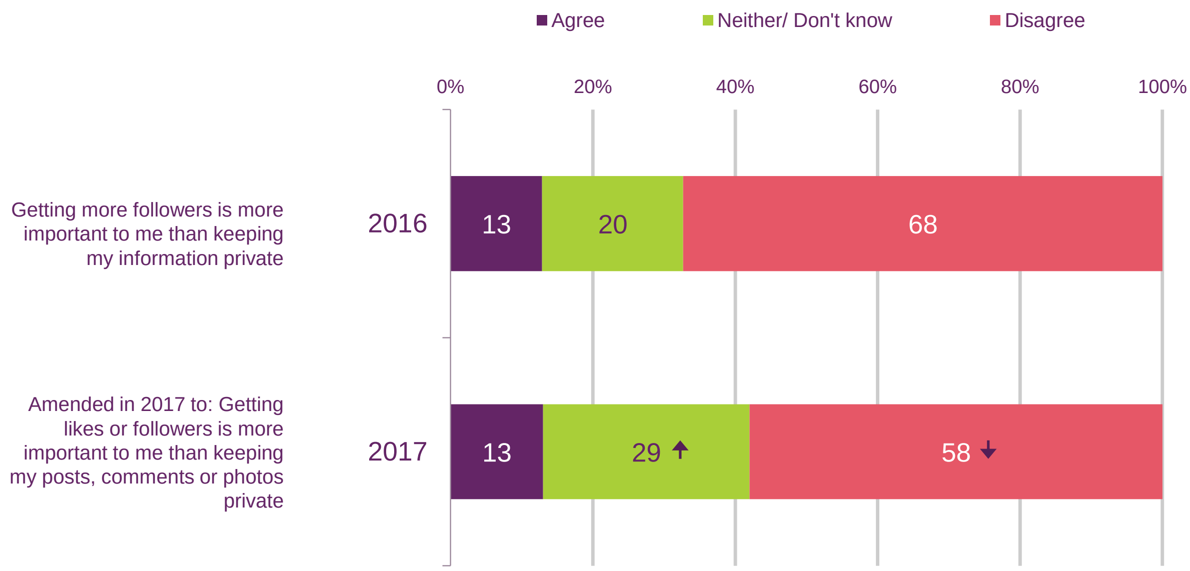
One in eight social media site users aged 12-15 say that getting likes or followers is more important to them than keeping their information private

In 2017, children aged 12-15 with a social media profile were prompted with a statement about social media sites and apps and were asked to say the extent to which they agreed or disagreed with it. The responses are shown in Figure 99.

For some children, the focus on getting likes can lead them towards potentially risky behaviour. One in eight 12-15s with a social media profile (13%) agree that "getting likes or followers is more important to me than keeping my posts, comments or photos private"; although the majority disagree (58%).

Although the question wording was amended slightly between 2016 and 2017 (which may influence the trend shown), children are less likely than in 2016 to disagree with the statement (58% vs. 68%). The proportion who agree is, however, unchanged; children are now more likely to be neutral or unsure (29% vs. 20% in 2016).

Figure 99: Agreement among 12-15s with a social media profile with statements about the importance of getting likes or followers: 2016, 2017



QC23 - I'm now going to read out one more statement about social media, but this time can you please have a look at this card and say which one applies to you (prompted responses, single coded).

Base: Children aged 12-15 with a social media profile or account (343). Significance testing shows any change between 2016 and 2017

One in eight 12-15s on social media feel there is pressure to look popular 'all the time'

In 2017, children aged 8-15[94] with a social media profile were prompted with two statements about social media sites or apps:

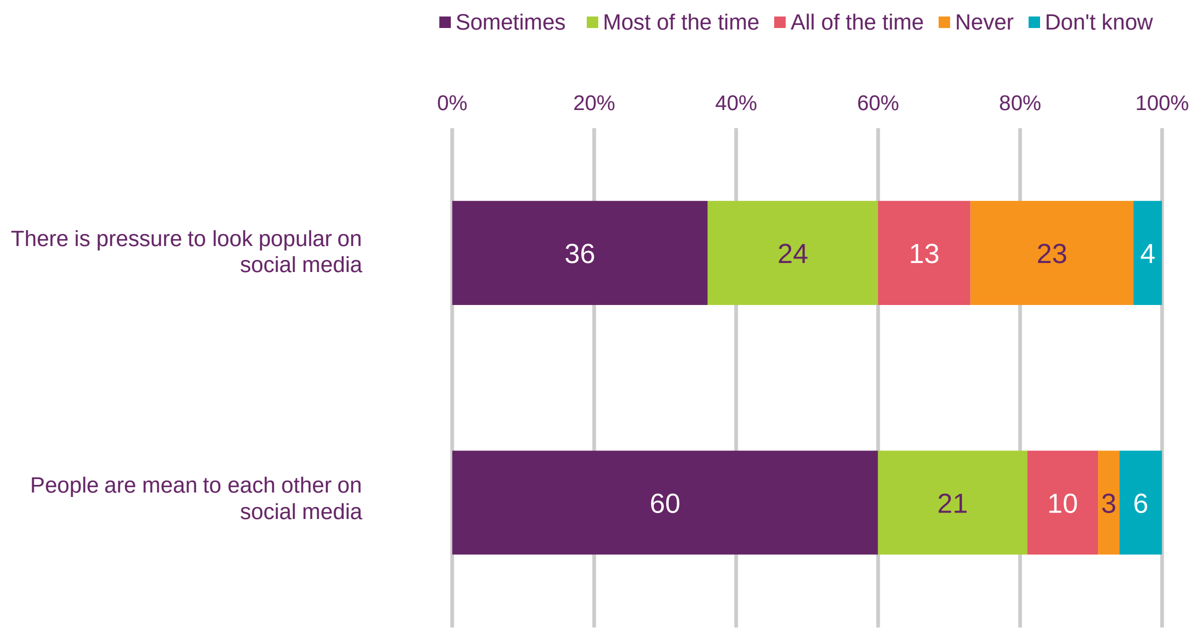
- "There is pressure to look popular on social media"
- "People are mean to each other on social media"

They were then prompted with four possible responses to each statement (all the time, most of the time, sometimes and never) and were asked to select the one answer that best described what they thought about each statement.

As shown in Figure 100, slightly more than a third of 12-15s with a social media profile or account (36%) feel there is 'sometimes' pressure to look popular on social media. About a quarter feel this applies either 'most of the time' (24%) or 'never' (23%). One in eight (13%) say there is pressure to look popular 'all the time'.

A majority of 12-15s with a social media profile or account (60%) say that people are mean to each on social media 'sometimes', and one in five (21%) say this is the case 'most of the time'. One in ten (10%) say that people are mean to each other 'all the time' and only 3% say this is 'never' true.

Figure 100: Agreement among 12-15s with a social media profile with statements about how people behave when using social media: 2017



QC22A/ QC22B - I'm going to read out some things about social media. Which of them best describes what you think for each one? (prompted responses, single coded).

Base: Children aged 12-15 with a social media profile or account (343).

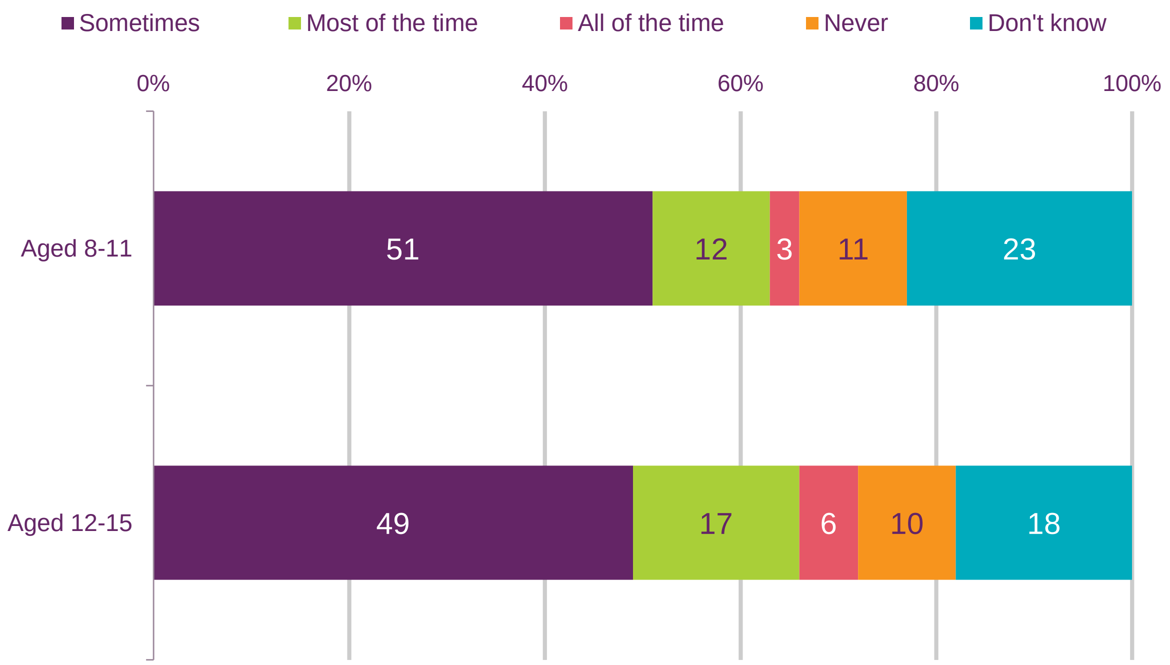
[94] The base for children aged 8-11 with a social media profile/ account is too low to report on (96 interviews).

Children aged 8-15 who ever play games online were asked about the extent to which they felt people are mean to each other when playing games online.

As shown in Figure 101, half of 8-11s (51%) and 12-15s (49%), say that people are 'sometimes' mean to each other when playing games online. Twelve per cent of 8-11s and 17% of 12-15s say this is true 'most of the time'.

Few 8-11s (3%) and 12-15s (6%) say that people are mean 'all the time' while one in ten 8-11s and 12-15s say people are 'never' mean to each other (11% for 8-11s and 10% for 12-15s). About one in five 8-11s (23%) and 12-15s (18%) say they are unsure.

Figure 101: Agreement among 8-15s who play games online with the statement that "people are mean to each other when playing games online": 2017



QC45 - Which one of these best describes what you think about a statement I am going to read out? (prompted responses, single coded).

Base: Children aged 8-15 who ever play games online (266 aged 8-11, 288 aged 12-15).

Differences by gender and socio-economic group

Girls aged 12-15 are more likely than boys to say that there should be rules about what people can say online to avoid them saying hurtful things

There are differences by gender among those 12-15s who opted to answer the question about knowing how to use, or having ever used, some of the 'safe' online measures (Figure 87). Girls aged 12-15 are more likely than boys to know how to change the settings so fewer people can view their social media profile (52% vs. 42%). They are, however, no more likely to have ever done this. While girls aged 12-15 are no more likely than boys to know how to block messages on social media from people they don't want to hear from, they are more likely to have ever done this (58% vs. 47%).

There are no differences by gender among 12-15s in terms of their experience of having ever seen anything online that they considered worrying or nasty; boys aged 8-11 are, however, more likely to say they have seen this (21% vs. 13% for girls).

Among 12-15s who opted to answer the question (Figure 93), girls are more likely than boys to say they have been contacted online by someone not known to them who wants to be their friend (27% vs. 18%). Boys are more likely than girls to say they have ever accidentally spent money online (13% vs. 5%). And boys aged both 8-11 and 12-15 are more likely than girls to say they have been bullied through online games (5% vs. 0% for 8-11s and 7% vs. 1% for 12-15s).

Attitudinally, there are also differences by gender. Girls aged 12-15 who go online are more likely than boys to disagree with the following statement: "I think it is important that people can say what they want online, even if it is hurtful to others" (59% vs. 43%). Girls of this age are also more likely than boys to agree that "I think there should be rules about what people can say online so that people can't say hurtful things about others" (77% vs. 68%).

Girls aged 12-15 who ever play games online are more likely than boys to say they are unsure whether people are mean to each other when playing games online (27% vs. 17%).

12-15s in ABC1 households are more likely than those in C2DE households to say they have often seen hate speech online in the past year

Children aged 12-15 who go online in ABC1 households are more likely than those in C2DE households[95] to know how to block junk email or spam (53% vs. 43%) and to have ever done this (39% vs. 25%). While they are no more likely to say they know how to do this, 12-15s in ABC1 households are more likely to say they have ever blocked on-screen pop-up adverts (29% vs. 19%).

While there are no differences by household socio-economic group in having seen hate speech online in the past 12 months (44% for 12-15s in ABC1 households vs. 46% for those in C2DE households), those in ABC1 households are more likely to say they have *often* seen this in the past year (11% vs. 6%).

[95] As this question was asked of 12-15s who go online it is not possible to analyse by all four socio-economic groups compared to the average for 12-15s, so we instead compare those in ABC1 households to those in C2DE households.

Children aged 12-15 in C2DE households who opted to answer the question are more likely than those in ABC1 households to say they have been contacted online by someone they don't know who wants to be their friend (27% vs. 19%).

14. Parents' attitudes and concerns

This section looks at parents' attitudes towards their children's use of the internet, and the extent to which they have specific concerns about television programmes, the internet, mobile phones, and any games that their children play, either at home or elsewhere. It starts by looking at attitudes towards screen time, advertising and content across all media types, before looking in more detail at concerns about each medium.

Key findings

- More parents of 5-15s are concerned about the time their child spends online (39% of parents whose child goes online) than are concerned about the time their child spends watching TV (29% of parents of 5-15s who watch TV).
- The majority of parents of children aged 3-15 agree with the statement: "I think my child has a good balance between screen time and doing other things" (83% for 3-4s, 81% for 5-7s, 78% for 8-11s, 67% for 12-15s).
- Managing screen time gets more difficult as children get older. While a minority of parents of 5-15s agree that they "find it hard to control their child's screen time" (32%), this increases from 12% of parents of 3-4s to 41% of parents of 12-15s.
- Children are more likely to ask their parents for something after seeing it advertised on TV than online: 70% of parents of 3-4s and 76% of parents of 5-15s whose child watches television say their child has ever asked them to buy something as a result of TV advertising, while 55% of parents of online 3-4s and 67% of parents of online 5-15s say their child has done this after seeing online advertising.
- Concerns about the kind of content children encounter are highest for online (35% among parents of online 5-15s), followed by television (31% among parents of 5-15s who watch TV) and gaming (29% among parents of 5-15s who play games).
- Concerns about television content have increased since 2016 among parents of 3-4s (22% vs. 14%) and 5-15s (31% vs. 25%). Similarly, concerns about the time their child spends watching television at home have increased since 2016 among parents of 3-4s (21% vs. 14%) and 5-15s (29% vs. 23%).
- The majority of parents whose child goes online continue to agree that they trust their child to use the internet safely and feel they know enough to help their child to manage online risks.
- Although parents whose child goes online continue to be more likely to agree than to disagree that the benefits of the internet outweigh the risks, agreement has decreased since 2016 among parents of 3-4s (47% vs. 55%) and 5-15s (58% vs. 66%).
- The concern most likely to be nominated by parents of 5-15s, of the nine potential concerns about their child's internet use we asked about, was "companies collecting information about what they are doing online", cited by 46%.

- Compared to 2016, parents of 5-15s are more likely to have concerns about seven of the nine concerns asked about: cyberbullying (40% vs. 30%), giving out details to inappropriate people (39% vs. 34%), time spent online (39% vs. 35%), seeing content which encourages them to harm themselves (38% vs. 27%), their child damaging their reputation (37% vs. 30%), online content (35% vs. 30%) and the possibility of their child being radicalised online (25% vs. 19%).
- A minority of parents are concerned about their child's mobile use, in terms of whom their child is in contact with (22% for 8-11s and 32% for 12-15s), how much time their child spends using the phone (29% for 8-11s and 40% for 12-15s), or their child being bullied through their phone (27% for 8-11s and 41% for 12-15s). However, each of these concerns is more likely, compared to 2016, among parents of 12-15s.
- Similarly, while a minority of parents are concerned about their child's gaming, concerns among parents of 5-15s are higher than in 2016 regarding gaming content (29% vs. 21%), whom their child is gaming with online (29% vs. 21%), their possibility of their child being bullied by other players (24% vs. 18%), the amount of advertising in games (27% vs. 20%), the pressure to make in-game purchases (30% vs. 26%), and time spent gaming (35% vs. 29%).

Differences by gender

- Parents of girls aged 3-4 (34%) are more likely than parents of boys (25%) to have concerns about the amount of TV advertising seen by their child.
- Parents of boys aged 12-15 (48%) are more likely than parents of girls (30%) to have concerns about their child being put under pressure to spend money online.
- Parents of boys aged 8-11 or aged 12-15 whose child plays games are more likely than parents of girls to be concerned about whom their child is playing with online and how much time they spend playing games. Parents of boys aged 12-15 are more likely than parents of girls to be concerned about the content of the games their child plays.

Differences by household socio-economic group

- Compared to the average for 5-15s, parents in DE socio-economic group households are less likely to have concerns about the amount and content of TV advertising their child sees, while those in AB households are more likely. Parents of 3-4s in ABC1 households are also more likely than those in C2DE households to say they have concerns about the content of TV advertising seen by their child.
- Concern among parents of 3-4s about the time spent watching television are higher among ABC1 parents than C2DE parents, and higher among AB parents compared to the average for 5-15s.
- Compared to the average for 5-15s, parents in AB households are more likely to agree that "the benefits of the internet for my child outweigh any risks". However, these parents are also more likely than average to be concerned about five of the nine specific concerns they were asked about.

- Parents of children aged 5-15 in AB households are more likely than average to have concerns about how much time their child spends using their phone.

Parents' attitudes to the time their child spends using media

Parents of 3-4s (since 2013) and parents of 5-15s (since 2009) were asked about the extent to which they were concerned about various aspects of their child's use of media. One aspect relates to the amount of time their child spends watching television (on any device), going online, playing games and using a mobile phone. These concerns are discussed in more detail later in this section but are summarised in Figure 102 for parents of children aged 5-15, while the responses from parents in each age group from 3 to 15 are shown in Figure 103.

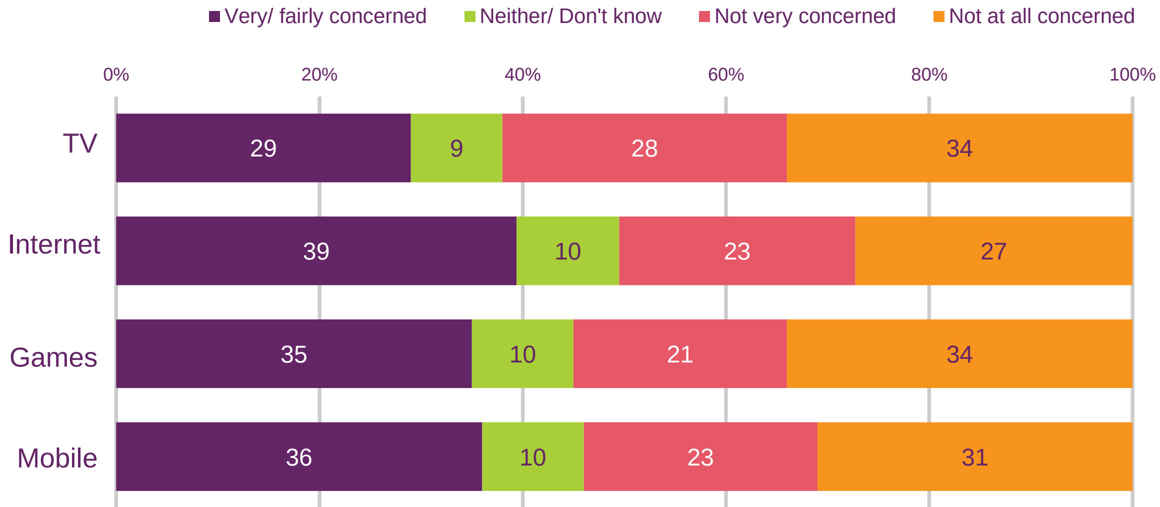
In 2017 (as in 2016), these questions were supplemented by questions assessing parental attitudes towards screen time (the time spent looking at screens on all the different devices used, including TV, mobiles, laptops, tablets and games players). These results are shown in Figure 104 and Figure 105.

Parents of 5-15s are most concerned about the time their child spends online and least concerned about the time spent watching TV

As shown in Figure 102, in 2017 close to four in ten parents of 5-15s whose child goes online (39%) are concerned about the time their child spends online, while fewer parents are concerned about the time their child spends using a mobile phone (36%) or playing games (35%). Parents are least likely to be concerned about the time their child spends watching television (29%).

Across each of the four media, parents of 5-15s are more likely to say they are either 'not very' or 'not at all' concerned than they are to say they are concerned.

Figure 102: Concerns about time spent using media, among parents of 5-15s using each medium: 2017



QP13B/ QP51B/ QP74B/ QP60A - Please tell me the extent to which you are concerned about these aspects of your child's TV viewing/ online activities/ game playing/ mobile phone use (prompted responses, single coded)

Base: Parents of children whose child watches TV (1360 aged 5-15)/ goes online (1247 aged 5-15)/ plays games (1028 aged 5-15)/ with their own mobile phone (633 aged 5-15).

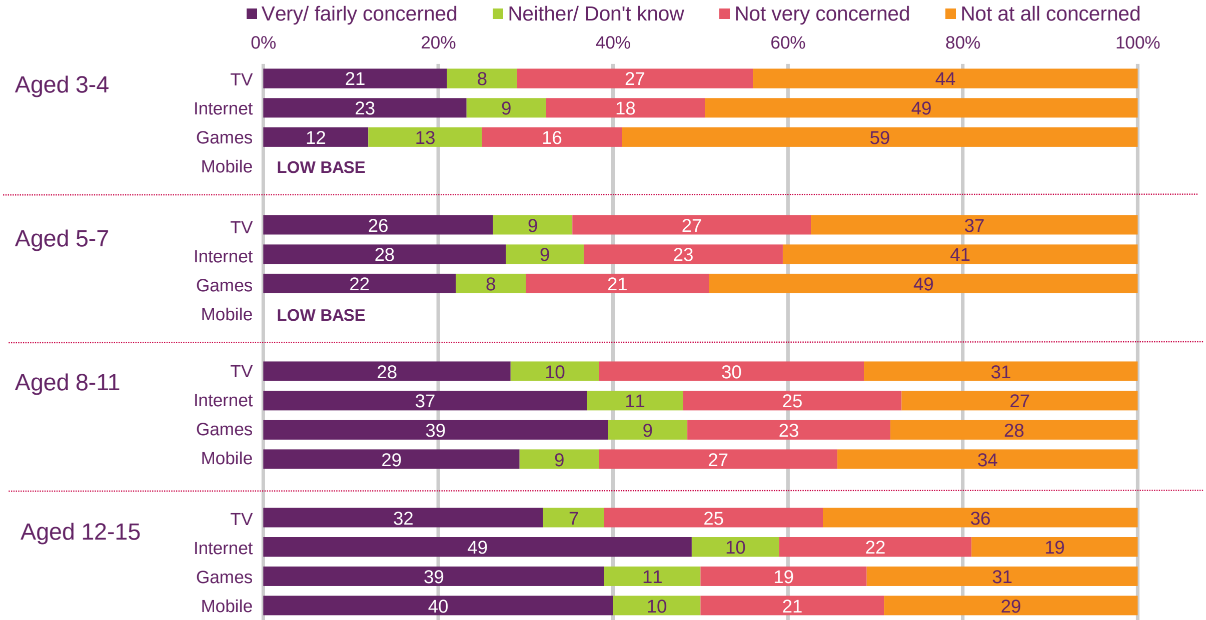
As shown in Figure 103, both for going online and for gaming, parents of 3-4s and 5-7s are less likely than parents of 8-11s or 12-15s to be concerned about the time their child spends using these media. Concern about the time their child spends going online increases with each age group of child, ranging from 23% of parents of 3-4s to 49% of parents of 12-15s. Concern about the time their child spends using a mobile[96] is also more likely among parents of 12-15s (40%) compared to parents of 8-11s (29%).

Parents of 3-4s and 5-7s are equally concerned about the time their child spends online and watching television; concerns about gaming are less likely. Parents of 8-11s are most likely to be concerned about the time their child spends online and gaming, and are less concerned about their time spent watching TV or using a mobile. Parents of 12-15s are most concerned about the time their child spends online and least concerned about the time their child spends watching TV. These findings about relative concerns, for each of the age groups, are consistent with those from 2016.

Details on the trends over time for each of these age groups are shown later in this section: at Figure 118 for time spent watching television, at Figure 126 for time spent going online, at Figure 133 for time spent using their mobile phone, and at Figure 140 for time spent gaming.

[96] It is not possible to show concerns for parents of 3-4s and 5-7s due to the low base size of children with their own mobile phone.

Figure 103: Concerns about time spent using media, among parents of 3-4, 5-7s, 8-11s and 12-15s using each medium: 2017



QP13B/ QP51B/ QP74B/ QP60A - Please tell me the extent to which you are concerned about these aspects of your child's TV viewing/ online activities/game playing/ mobile phone use (prompted responses, single coded).

Base: Parents of children whose child watches TV (657 aged 3-4, 408 aged 5-7, 485 aged 8-11, 467 aged 12-15)/ goes online (354 aged 3-4, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15)/ plays games (264 aged 3-4, 266 aged 5-7, 393 aged 8-11, 369 aged 12-15)/ with their own mobile phone (199 aged 8-11, 407 aged 12-15).

Around a third of parents of 5-15s agree that they find it hard to control their child's 'screen time'

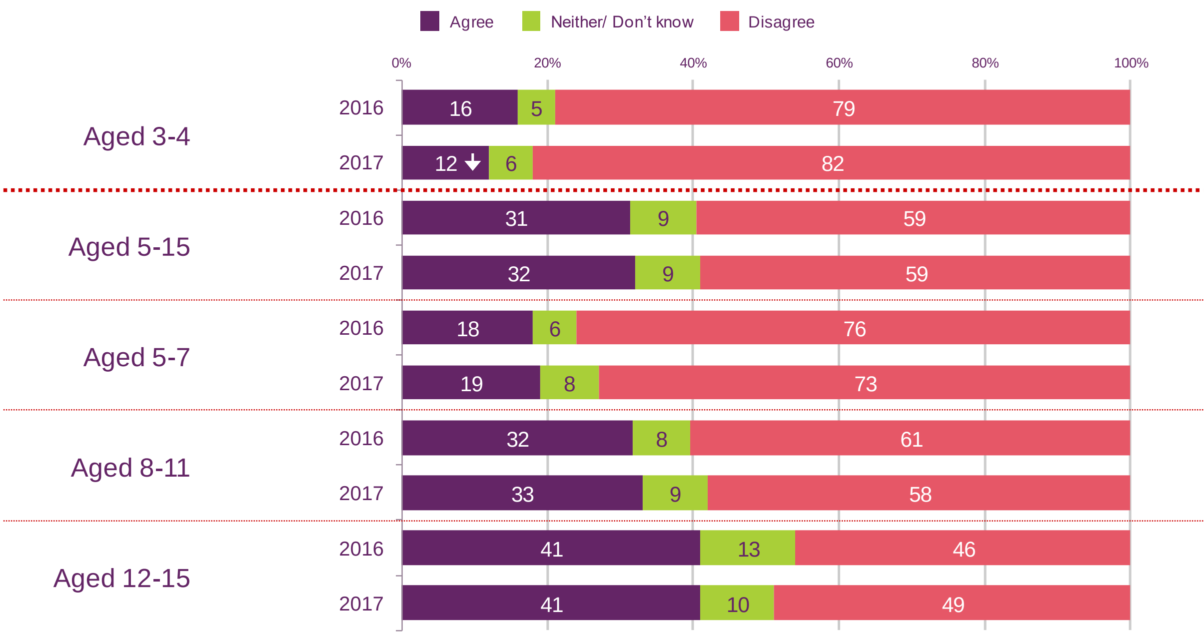
Since 2016 we have asked questions to assess parental attitudes towards screen time - the time spent looking at screens on all the devices used, including TV, mobiles, laptops, tablets and games players.

Parents of children aged 3-15 were asked the extent to which they agreed or disagreed with two specific statements, with findings shown in Figure 104 and Figure 105:

- "I find it hard to control my child's screen time"
- "I think my child has a good balance between screen time and doing other things"

As shown in Figure 104, a majority of parents of 3-4s (82%), 5-7s (73%) and of 8-11s (58%) disagree that they find it hard to control their child's screen time. Close to half (49%) of parents of 12-15s also disagree. The number who agree that they find it hard to control their screen time are therefore in the minority for each age group, although agreement increases with the age of the child, ranging from just over one in ten parents of 3-4s (12%), one in five parents of 5-7s (19%) to a third of 8-11s (33%) and four in ten parents of 12-15s (41%). Apart from a decline in agreement among parents of 3-4s (12% from 16%), parental attitudes in response to the statement "I find it hard to control my child's screen time" are unchanged since 2016.

Figure 104: Parental agreement with "I find it hard to control my child's screen time", by age: 2016, 2017

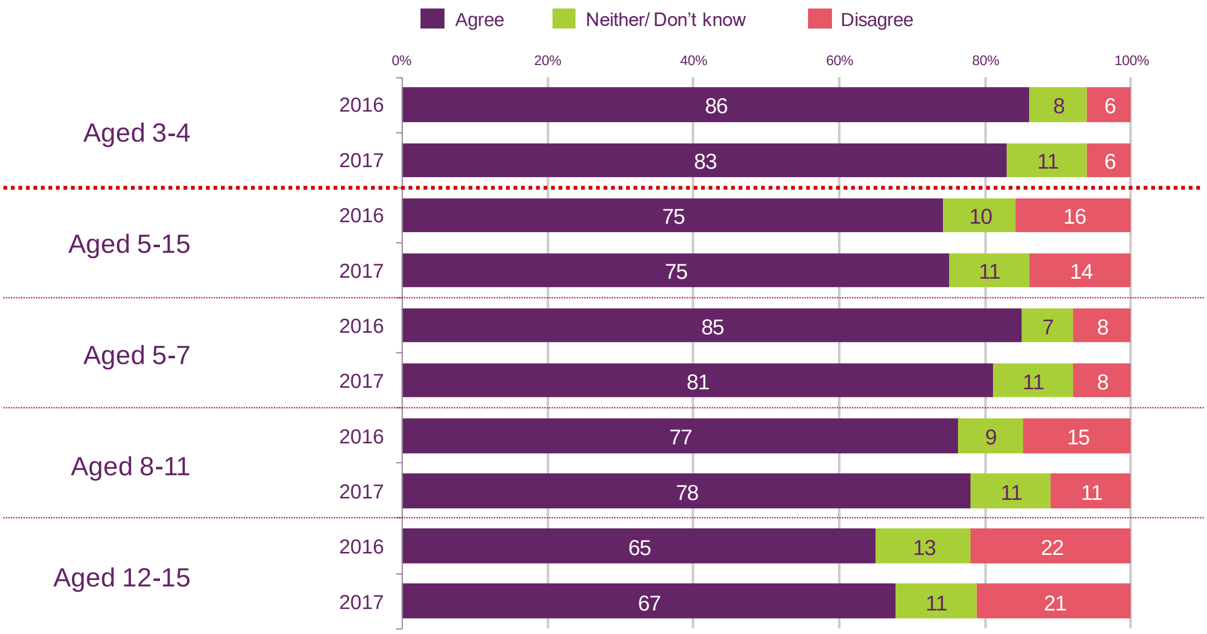


QP75A – I'd now like to ask you some questions about your child's screen time. By screen time I mean the time your child spends looking at screens on all the different devices they may use, including TV, mobile phones, laptops, tablets and gaming devices.

Base: Parents of children aged 3-4 (677) or 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15). Significance testing shows any change between 2016 and 2017

As shown in Figure 105, a majority of parents in each age group agree with the statement "I think my child has a good balance between screen time and doing other things", with agreement decreasing with the age of the child and ranging from 83% of parents of 3-4s and 81% of parents of 5-7s, through to 78% of parents of 8-11s and 66% of parents of 12-15s. As such, around one in five parents of 12-15s (21%) disagree with this statement. Parental attitudes in response to the statement "I think my child has a good balance between screen time and doing other things" are unchanged since 2016.

Figure 105: Parental agreement with "I think my child has a good balance between screen time and doing other things", by age: 2016, 2017



QP75B – I'd now like to ask you some questions about your child's screen time. By screen time I mean the time your child spends looking at screens on all the different devices they may use, including TV, mobile phones, laptops, tablets and gaming devices.

Base: Parents of children aged 3-4 (677) or 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15).

Children aged 12-15 and their parents are equally likely to agree that the child has a good balance between screen time and doing other things

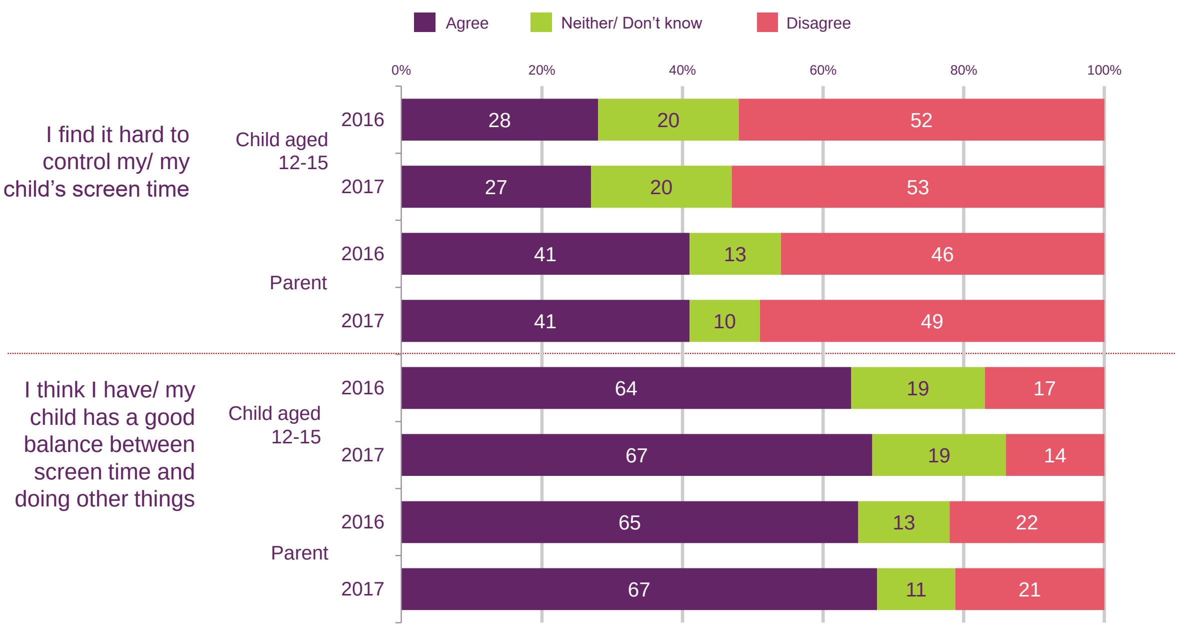
In addition to asking parents the extent to which they agreed or disagreed with the statements regarding their child's screen time, children aged 12-15 were asked how they felt about their own screen time. Figure 106 shows the responses to each of the statements in 2016 and in 2017: the child aged 12-15's response, followed by the parental response.

Around half of 12-15s (53%) disagree with the statement "I find it hard to control my screen time", while around a quarter (27%) agree with this statement. Parents of 12-15s are more likely than their child to agree with the statement "I find it hard to control my child's screen time", suggesting that controlling their child's screen time is more of an issue for parents than for children.

In comparison, the responses about having a good balance between screen time and doing other things are much more closely aligned between parents and children, with an identical proportion of 12-15s agreeing with this statement, compared to this group's parents (67%).

As shown in Figure 106, agreement with each of the statements is unchanged since 2016 for both children and parents.

Figure 106: Agreement with attitudinal statements about screen time for children aged 12-15, child and parent response: 2016 and 2017



QP75A/B/ QC51B/C – I'd now like to ask you some questions about your child's/ your screen time. By screen time I mean the time your child spends/ you spend looking at screens on all the different devices they / you may use, including TV, mobile phones, laptops, tablets and gaming devices.

Base: Parents of children aged 3-4 (677) or 5-15 (1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15).

Parental attitudes to advertising

Compared to last year, parents of 3-4s and 5-15s are more likely to be concerned about the amount of TV advertising seen by their child

Since 2016, parents have been asked some questions about advertising, including the extent to which they were concerned about the amount of TV advertising their child sees (Figure 107) and the content of this advertising (Figure 108) and about whether their children ever asked them to purchase products after seeing them advertised, either on television or online (Figure 109).

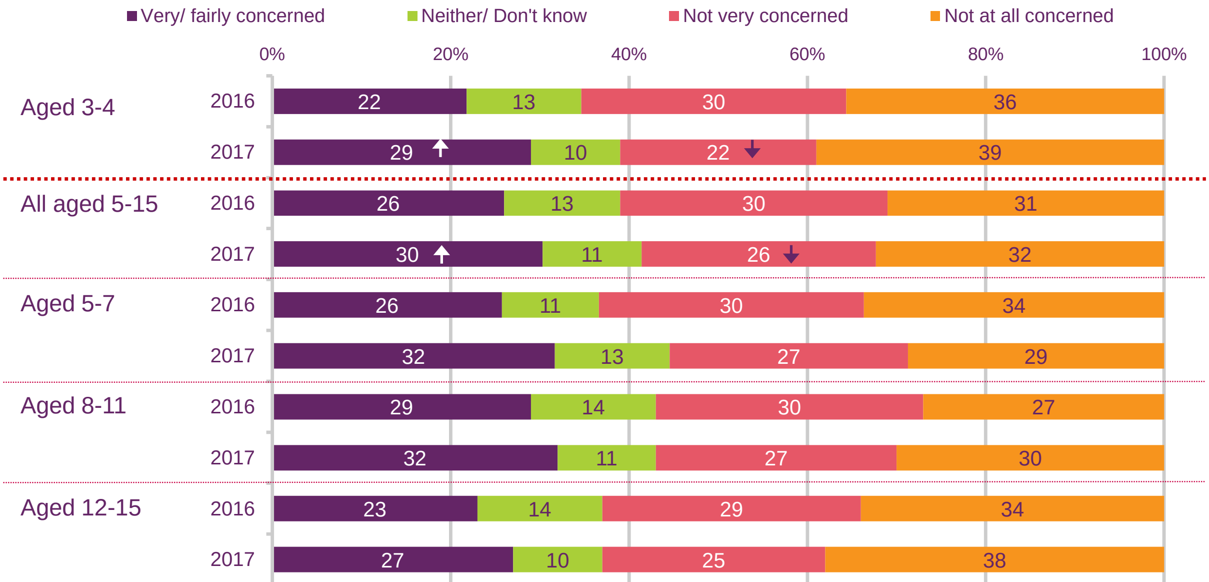
As shown in Figure 107 and Figure 108, parents of children aged 3-15 are most likely to say they are not very, or not at all, concerned about the amount or content of the TV advertising that their child sees. Parents with children in each of the four age groups are equally concerned about the amount of TV advertising as they are about the content of the TV advertising.

There is also little variation by the age of the child; between 27% and 34% of parents are concerned about either the amount or the content of the TV advertising their child sees.

Compared to 2016, parents of 3-4s (29% vs. 22%) and parents of 5-15s (30% vs. 26%) are more likely to say they are concerned about the amount of TV advertising seen by their child. This increase in the proportion who are concerned is matched by a decrease in the proportion of parents of 3-4s (22% vs. 30%) and parents of 5-15s (26% vs. 30%) who say they are not very concerned about this.

Concerns among parents about the content of TV advertising seen by their child are unchanged since 2016.

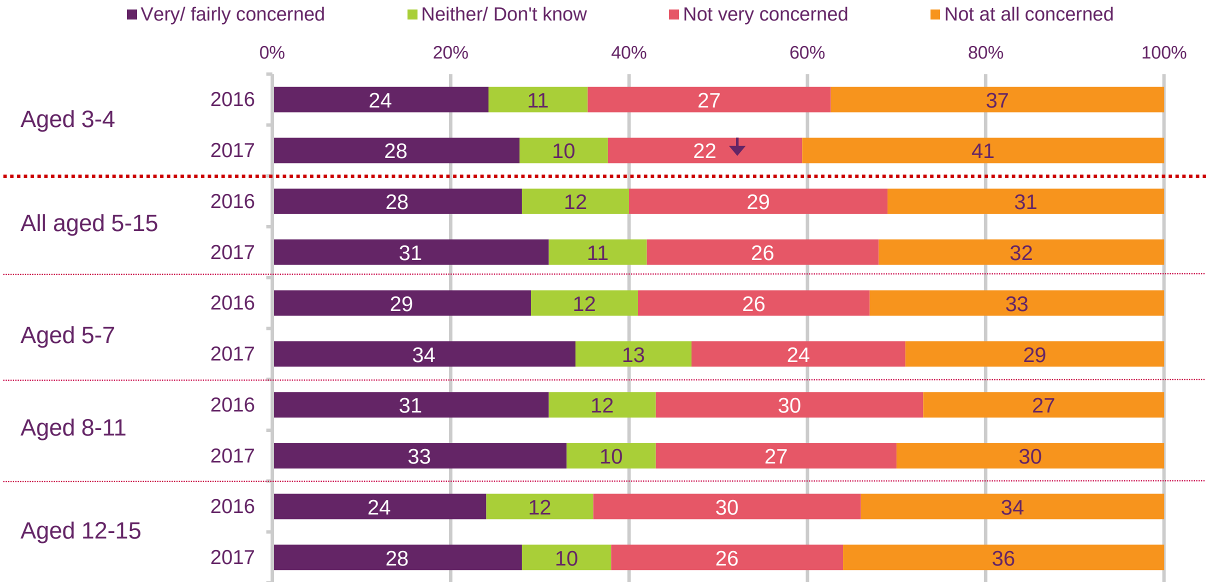
Figure 107: Parents' concerns about the amount of TV advertising seen by their child: 2016, 2017



QP13C – Please tell me the extent to which you are concerned about these aspects of your child's TV viewing – The amount of TV advertising they see (prompted responses, single coded)

Base: Parents of children whose child watches TV (657 aged 3-4, 1360 aged 5-15, 408 aged 5-7, 485 aged 8-11, 467 aged 12-15). Significance testing shows any change between 2016 and 2017

Figure 108: Parents' concerns about the content of the TV advertising seen by their child: 2016, 2017



QP13D – Please tell me the extent to which you are concerned about these aspects of your child's TV viewing – The content of the TV advertising they see (prompted responses, single coded).

Base: Parents of children whose child watches TV (657 aged 3-4, 1360 aged 5-15, 408 aged 5-7, 485 aged 8-11, 467 aged 12-15). Significance testing shows any change between 2016 and 2017

Compared to last year, parents of 5-15s are more likely to say their child has asked them for something they've seen advertised on TV or online

Parents of children who watch television were asked: "In the past 12 months has your child asked you to buy something because they've seen it advertised on TV?"; the results are shown in Figure 109. A similar question was asked of parents whose child goes online, about online advertising (Figure 110).

Three-quarters of parents of 5-15s (76%) whose child watches television say their child has ever asked them to buy something as a result of TV advertising; this incidence is lower among parents of 3-4s (70%).

As shown in Figure 109, parents of 5-7s whose child watches television are the most likely to say their child has ever asked them to buy something as a result of TV advertising (87%), while parents of 12-15s are the least likely (65%).

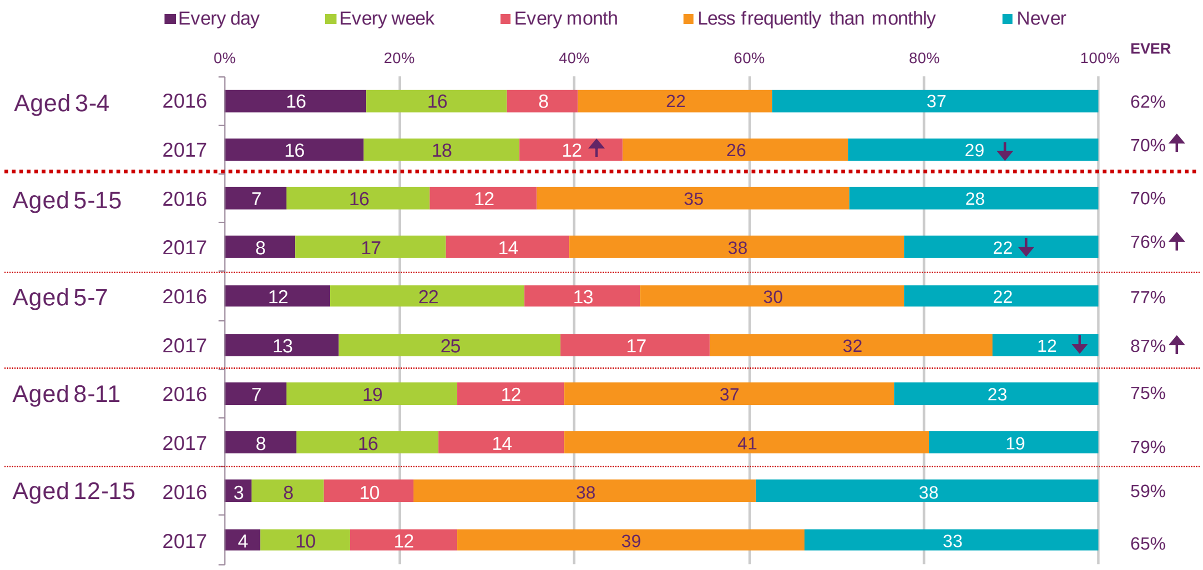
Compared to 2016, parents of younger children are more likely to say their child has made requests prompted by TV advertising, with this increase seen among parents of 3-4s (70% vs. 62%) and 5-7s (87% vs. 77%), leading to an increase for 5-15s as a whole (76% vs. 70%).

Figure 110 shows that requests to buy something after seeing online advertising are less likely than requests prompted by TV advertising; 67% of parents of 5-15s who go online and 55% of parents of 3-4s say their child has ever done this after seeing online advertising.

Comparing the overall incidence of children making requests of their parents as a result of TV advertising and online advertising, the incidence for online advertising is lower among parents of 3-4s (55% vs. 70%), 5-15s (67% vs. 76%), 5-7s (62% vs. 87%) and 8-11s (69% vs. 79%). Parents of 12-15s are, however, broadly equally likely to say their child has done this as a result of online, and TV, advertising (64% vs. 69%).

Compared to 2016, parents of 5-15s are more likely to say their child has made requests prompted by online advertising (67% vs. 63%), but this increase is not evident for any individual age group.

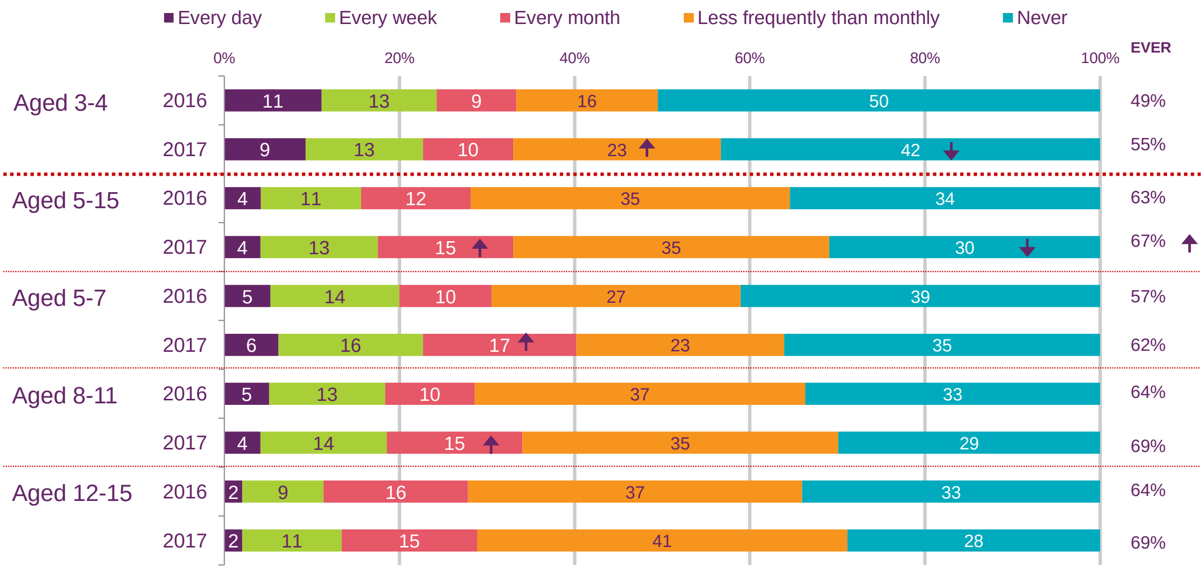
Figure 109: Frequency with which parents whose child watches TV have been asked to buy something due to television advertising, by age: 2016, 2017



QP16 – In the past 12 months, has your child asked you to buy something because they've seen it advertised on TV? IF YES - Which of these best describes how frequently in the past 12 months your child has asked you to do this? (prompted responses, single coded).

Base: Parents of children whose child watches TV (657 aged 3-4 , 1360 aged 5-15, 408 aged 5-7, 485 aged 8-11, 467 aged 12-15). Significance testing shows any change between 2016 and 2017

Figure 110: Frequency with which parents whose child goes online have been asked to buy something due to online advertising, by age: 2016, 2017



QP51K – In the past 12 months, has your child asked you to buy something because they've seen it advertised online? IF YES - Which of these best describes how frequently in the past 12 months your child has asked you to do this? (prompted responses, single coded).

Parents whose child ever goes online aged 3-4 (354) or 5-15 (1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017

Parents' attitudes towards media content

Parents are more likely to be concerned about online content than about television or gaming content

Parents were asked a range of questions to gauge the extent to which they are concerned about their child's exposure, at home or elsewhere[97], to potentially harmful or inappropriate content across the different media used by their child.

To show how the level of concern varies for each medium, responses from parents of children in different age groups are shown below[98]. Figure 111 shows responses from parents of children aged 5-15, while Figure 112 shows responses from parents of children in each age group from 3 to 15.

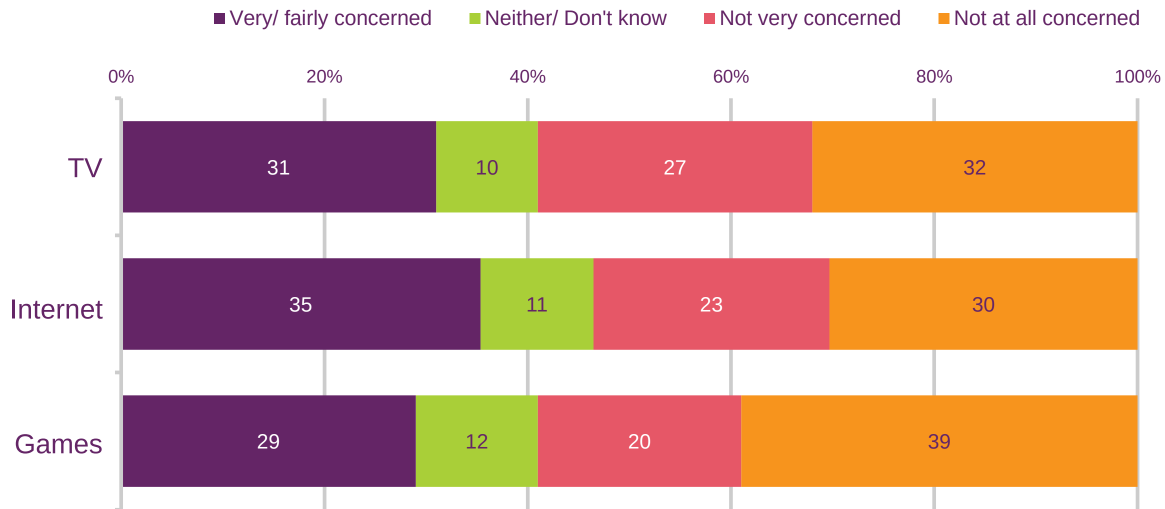
Parents of 5-15s are most likely to be concerned about online content (35%), followed by television content (31%) and gaming content (29%). As shown in Figure 112, around one in five parents of 3-4s

[97] There has been a change in the survey's focus since 2014: moving from a child's use of media 'at home' in previous years to 'at home or elsewhere'.
[98] The comparisons are drawn between users of each medium, as opposed to being based on all parents, irrespective of whether their child uses that medium.

are concerned about television (22%) or online content (23%), with one in ten concerned about gaming (10%).

Concern about TV and online and gaming content is lower among parents of 3-4s than among parents of older children. For gaming content, concerns are lower among parents of 5-7s than among parents of 8-11s or 12-15s.

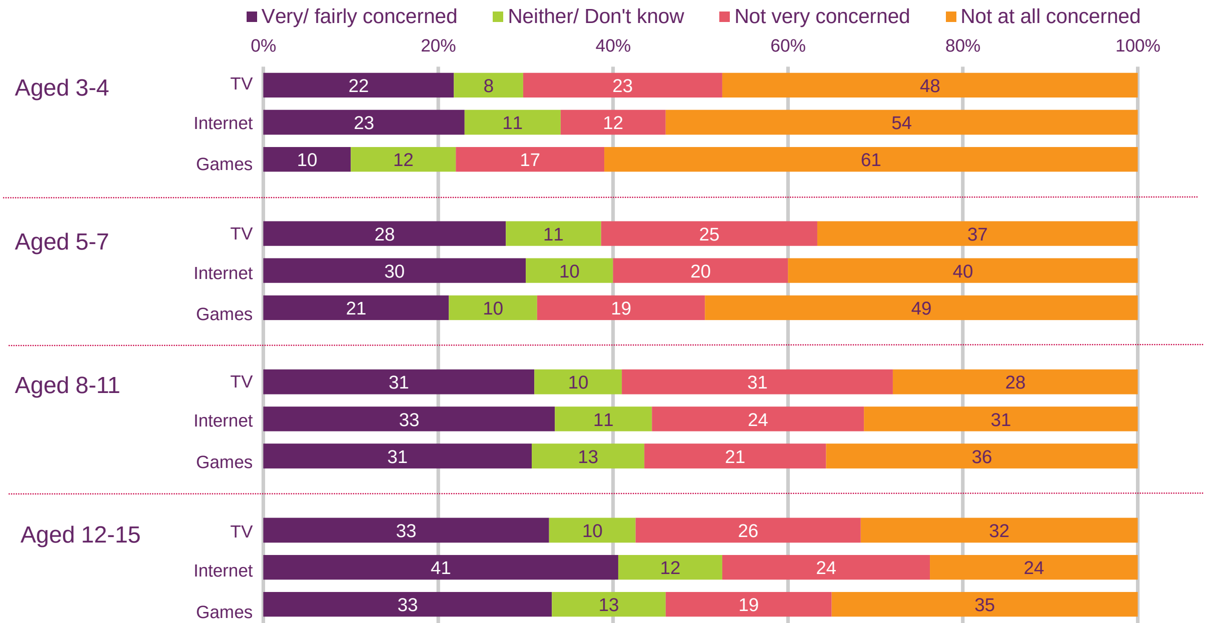
Figure 111: Concerns about media content, among parents of 5-15s using each medium: 2017



QP13A/ QP51A/ QP74A - Please tell me the extent to which you are concerned about these aspects of your child's TV viewing/ online activities/game playing (prompted responses, single coded).

Base: Parents of children whose child watches TV (1360 aged 5-15)/ goes online (1247 aged 5-15)/ plays games (1028 aged 5-15).

Figure 112: Concerns about media content, among parents of 3-4s, 5-7s, 8-11s and 12-15s using each medium: 2017



QP13A/ QP51A/ QP74A - Please tell me the extent to which you are concerned about these aspects of your child's TV viewing/ online activities/ games playing? (prompted responses, single coded).

Base: Parents whose child watches TV (657 aged 3-4, 408 aged 5-7, 485 aged 8-11, 467 aged 12-15)/ goes online (354 aged 3-4, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15)/ plays games (264 aged 3-4, 266 aged 5-7, 393 aged 8-11, 369 aged 12-15).

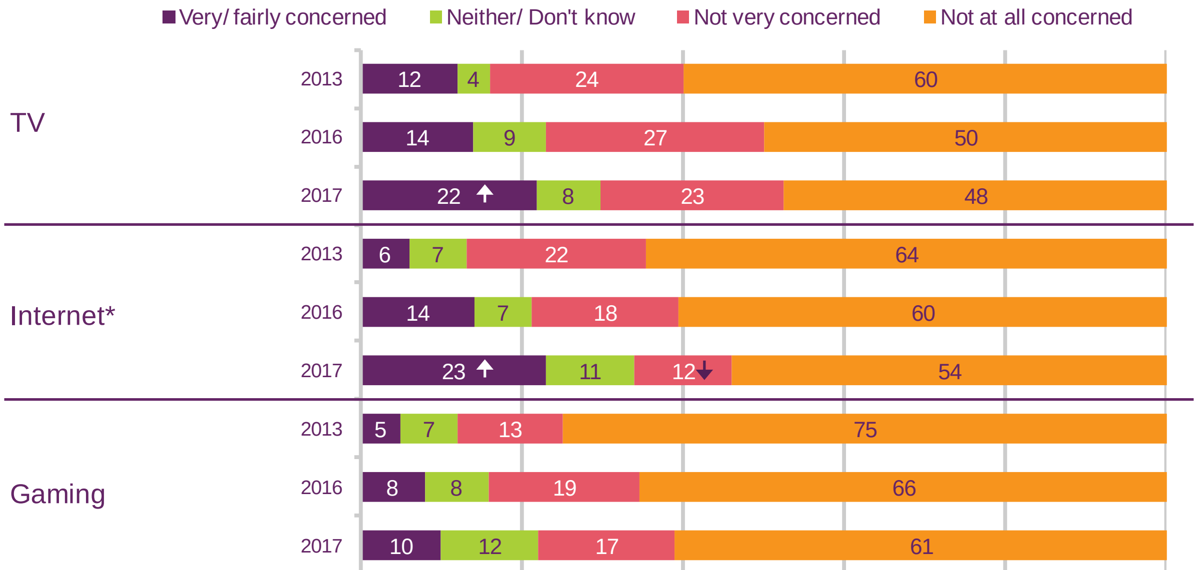
Parents of 3-4s and 5-15s are more likely than in 2016 to be concerned about TV and online content

Figure 113 shows trends over time for concerns about television, online and gaming content among parents of users aged 3-4, while Figure 114 shows concerns over time among parents of users aged 5-15.

Compared to 2016 there has been an increase in the proportion of parents of 3-4s who say they are concerned about television (22% vs. 14%) or online (23% vs. 14%) content, with no change for gaming content (10%). There has been an increase since 2016 in the proportion of parents of 5-15s who say they are concerned about television (31% vs. 25%), online (35% vs. 30%) and gaming (29% vs. 21%) content.

More details on the trends for each of these age groups are shown later in this section: at Figure 115 for television content, Figure 129 for online content, and Figure 135 for gaming.

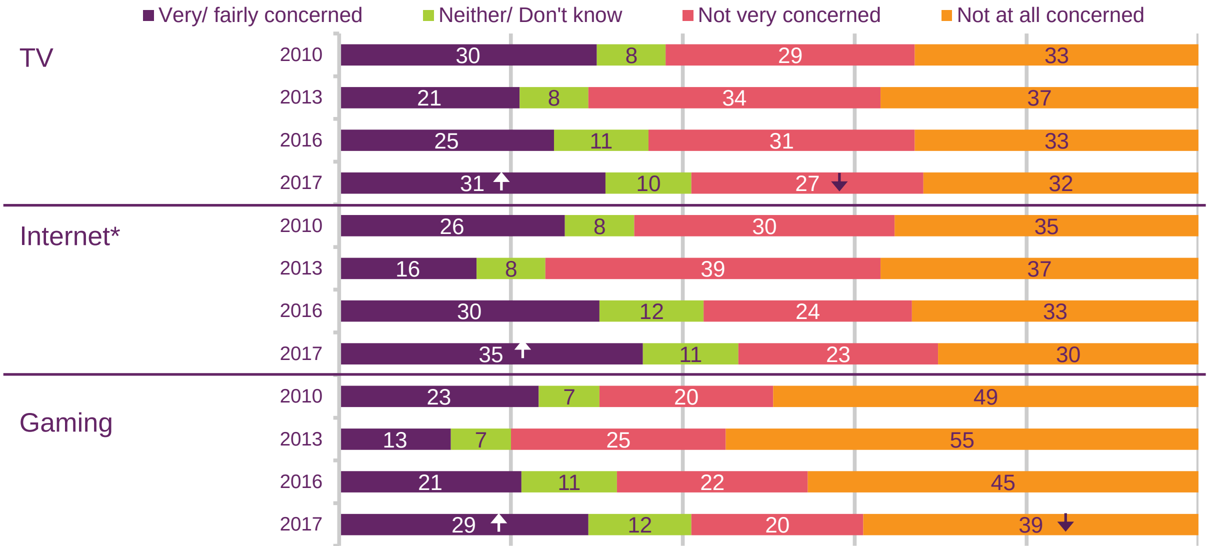
Figure 113: Parental concerns about media content, among parents of 3-4s using each media type at home (2013) or elsewhere (2016, 2017)



QP13A/ QP51A/ QP74A – Please tell me the extent to which you are concerned about these aspects of your child's TV viewing/ online activities/ games playing? (prompted responses, single coded). In 2016 and 2017 the question for the internet asked about 'the content on the websites or apps that they visit'. In 2013 it did not refer to apps, just websites.*

Base: Parents of 3-4s whose child watches TV (657), goes online (354), plays games (264) – significance testing shows any change between 2016 and 2017.

Figure 114: Concerns about television, online or gaming content, among parents of 5-15s using each media type at home (2010, 2013) or elsewhere (2016, 2017)



QP13A/ QP51A/ QP74A – Please tell me the extent to which you are concerned about these aspects of your child's TV viewing/ online activities/game playing? (prompted responses, single coded). In 2016 and 2017 the question for the internet asked about 'the content on the websites or apps that they visit'. In 2010 and 2013 it did not refer to apps, just websites.*

Base: Parents of children aged 5-15 whose child watches TV (1360 aged 5-15)/ goes online (1247 aged 5-15)/ plays games (1028 aged 5-15)– significance testing shows any change between 2016 and 2017.

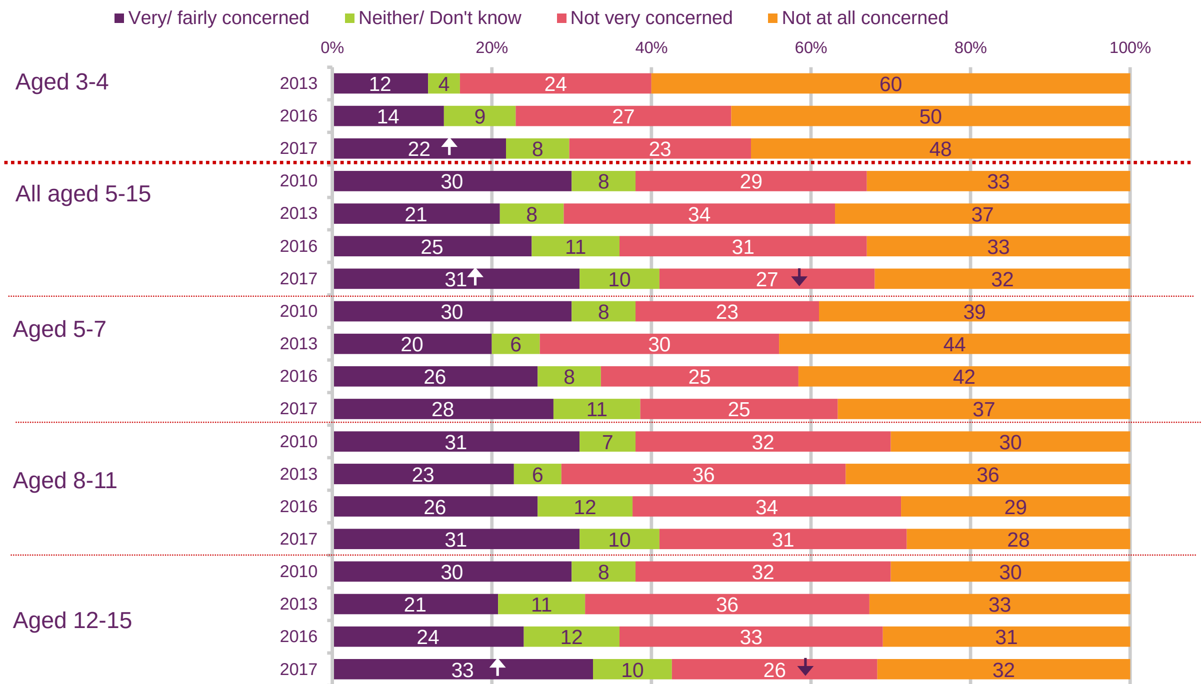
Parental concerns about television

Most parents continue to say they are not concerned about television content, but there is increased concern among parents of 3-4s and 5-15s

Figure 115 shows that overall concern (very/fairly) about television content does not vary particularly by the age of the child among parents of 5-7s (28%), 8-11s (31%) or 12-15s (33%), and is lower for parents of 3-4s (22%). Parents of children in each age group continue to be more likely to be unconcerned than concerned about the television content their child watches.

The overall increase since 2016 in the proportion of parents of 5-15s with concerns about the television content their child watches (31% vs. 25%) is attributable to an overall increase among parents of 12-15s compared to 2016 (33% vs. 24%). As shown in Figure 113, there has also been an increase in parental concerns about television content since 2016 among parents of 3-4s (22% vs. 14%).

Figure 115: Parental concerns about television content watched at home (2010, 2013) or elsewhere (2016, 2017), by age of child



QP13A – Please tell me the extent to which you are concerned about these aspects of your child's TV viewing – The content of the TV programmes they watch (prompted responses, single coded).

Base: Parents of children whose child watches TV (657 aged 3-4, 1360 aged 5-15, 408 aged 5-7, 485 aged 8-11, 467 aged 12-15) Significance testing shows any change between 2016 and 2017.

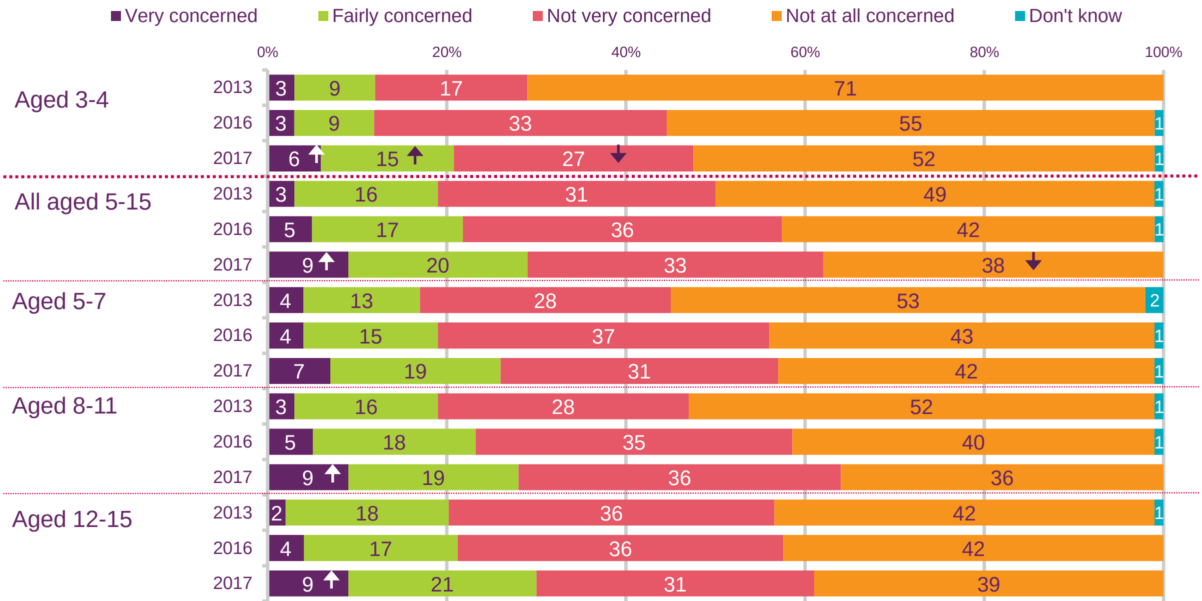
Although a minority of parents say they are concerned about what their child has seen on pre-watershed television, concerns are higher than in 2016

Parents of 3-4 and 5-15s whose child watches TV at home or elsewhere were asked to think specifically about television programmes that are on during the day and evening up to 9pm, and were asked how concerned, if at all, they were about the types of things their child had seen on TV in the past 12 months, at home or elsewhere. The results are shown in Figure 116.

One in five parents of 3-4s (21%) say they are concerned overall (very/ fairly) about the types of things their child has seen on pre-watershed TV, with close to eight in ten (79%) saying they are either not very, or not at all concerned. Parents of 5-15s (29%) are more likely than parents of 3-4s (21%) to say they are concerned. Among parents of 5-15s, concern does not vary by the age of the child.

There has been an increase since 2016 in the proportion of parents saying they are very concerned about the types of things their child has seen on pre-watershed TV, among parents of 3-4s (6% vs. 3%), 8-11s (9% vs. 5%), 12-15s (9% vs. 4%) and 5-15s as a whole (9% vs. 5%).

Figure 116: Parental concerns about pre-watershed television content: 2013, 2016, 2017



QP14 – I’d like to ask you a bit more about your views on the types of programmes your child watches, and would like you to think specifically about TV programmes that are on during the day and evening up until 9pm. So, thinking about your child's television viewing, how concerned are you, if at all, by the types of things your child has seen on TV in the last 12 months? (prompted responses, single coded).

Base: Parents of children whose child watches TV (657 aged 3-4, 1360 aged 5-15, 408 aged 5-7, 485 aged 8-11, 467 aged 12-15) - Significance testing shows any change between 2016 and 2017.

Parents of children aged 3-4 and 5-15 who said they were concerned about the types of things their child had seen on pre-watershed TV in the past 12 months were then asked to say, without prompting, what had concerned them about their child’s TV viewing. These responses were then categorised by the interviewer into a list of possible concerns. The results are shown in Figure 117, with the proportions rebased and expressed as a proportion of all parents whose child watches TV at home or elsewhere.

As mentioned above, one in five parents of 3-4s (21%) and about three in ten parents of 5-15s (29%) have concerns about what their child has seen on pre-watershed TV in the past 12 months.

As with the overall incidence of concern, parents of 3-4s are mostly less likely than parents of 5-15s to have each individual concern. Among parents of 5-15s, there is little variation in concerns by the age of the child.

There are four types of concern that one in ten or more parents of 5-15s are likely to be concerned about: offensive language (16%), sex or sexually-explicit content (14%), content unsuitable for younger people (13%) and violence (in general) (12%). Among parents of 3-4s whose child watches television, offensive language (11%) is the only concern mentioned by one in ten parents, or more, in 2017.

Parents of 3-4s and 5-15s are more likely than in 2016 to say they are concerned about offensive language, sex/ sexually-explicit content, content unsuitable for younger people and violence (in general). Parents of 3-4s are also more likely than in 2016 to be concerned about nakedness/ naked bodies and portrayal of anti-social behaviour. There are no concerns that are less likely than in 2016.

Figure 117: Types of concern about pre-watershed television content, by age: 2017

	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
ANY CONCERNS	21% ↑	28% ↑	26% ↑	28%	30% ↑
Offensive language	11% ↑	16% ↑	15%	17%	17% ↑
Sex/ sexually explicit content	8% ↑	14% ↑	9%	15%	15%
Unsuitable content for younger people/ children	9% ↑	13% ↑	10%	15%	13%
Violence (in general)	9% ↑	12% ↑	11%	13%	12%
Sexually provocative/ sexualised performances (i.e. could be through acting or dancing in music videos etc.)	6%	8%	6%	9%	10%
Unsuitable content aired pre-watershed	6%	8%	5%	9%	10%
Nakedness/ naked bodies/ naked body parts	7% ↑	8%	5%	9%	9%
Portrayal of anti-social behaviour	5% ↑	6%	4%	7%	7%
Glamorisation of certain lifestyles	2%	6%	3%	7%	7%
Makes me feel embarrassed/ don't feel comfortable watching with others/ adults	3%	4%	2%	4%	6%
Makes me feel embarrassed/ don't feel comfortable watching with my child/ children	3%	4%	3%	4%	5%
Lack of respect towards adults	2%	4%	4%	5%	3%
Discriminatory treatment/ portrayal of people	2%	4%	3%	4%	5%
Negative portrayal of or objectification of women	2%	3%	2%	3%	4%
Invasion of privacy/ not respecting people's privacy	1%	2%	2%	3%	2%

QP15 – Still thinking specifically about what your child watches during the day and up until 9pm in the evening, what kind of things concern you about what your child has seen on TV in the last 12 months? (unprompted responses, multi-coded).

Base: Parents of children whose child watches TV (657 aged 3-4, 1360 aged 5-15, 408 aged 5-7, 485 aged 8-11, 467 aged 12-15) - Significance testing shows any change between 2016 and 2017.

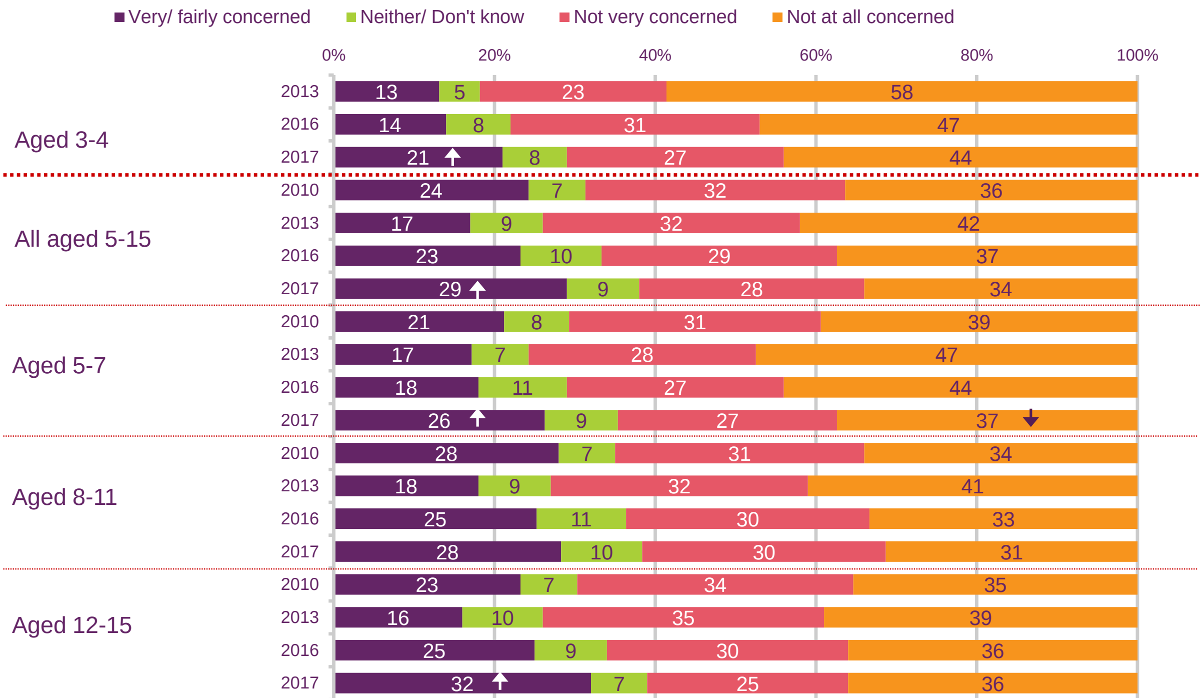
Around three in ten parents of 5-15s say they are concerned about the time their child spends watching television, an increase since 2016

As summarised earlier, parents of 3-4 and 5-15s whose child watches TV at home or elsewhere were asked to think about the extent to which they are concerned about the time their child spends watching television (on any device)[99]. Parents of 3-4s (21%) are less likely than parents of 5-7s (26%), 8-11s (28%) or 12-15s (32%) to say they are concerned.

For each age group of child, parents are more likely to say they are not at all concerned, rather than being very, or fairly, concerned about how much time their child spends watching television.

Compared to 2016, there has been an increase in the proportion of parents who are concerned about the time their child spends watching television: among parents of 3-4s (21% vs. 14%), 5-7s (26% vs. 18%), 12-15s (32% vs. 25%) and 5-15s as a whole (29% vs. 23%).

Figure 118: Parental concerns about the time their child spends watching television at home (2010, 2013) at home or elsewhere (2016, 2017)



QP13B – Please tell me the extent to which you are concerned about these aspects of your child's TV viewing – How much time they spend watching TV (prompted responses, single coded) NB before 2012 this was asked of those who watched TV content on a TV set as opposed to TV content on any type of device.

Base: Parents of children whose child watches TV (657 aged 3-4, 1360 aged 5-15, 408 aged 5-7, 485 aged 8-11, 467 aged 12-15) - Significance testing shows any change between 2016 and 2017.

[99] Before 2012, this question was only asked of those who watched television on a TV set, but this is now asked of those who watch television on any type of device.

Parental attitudes towards the internet

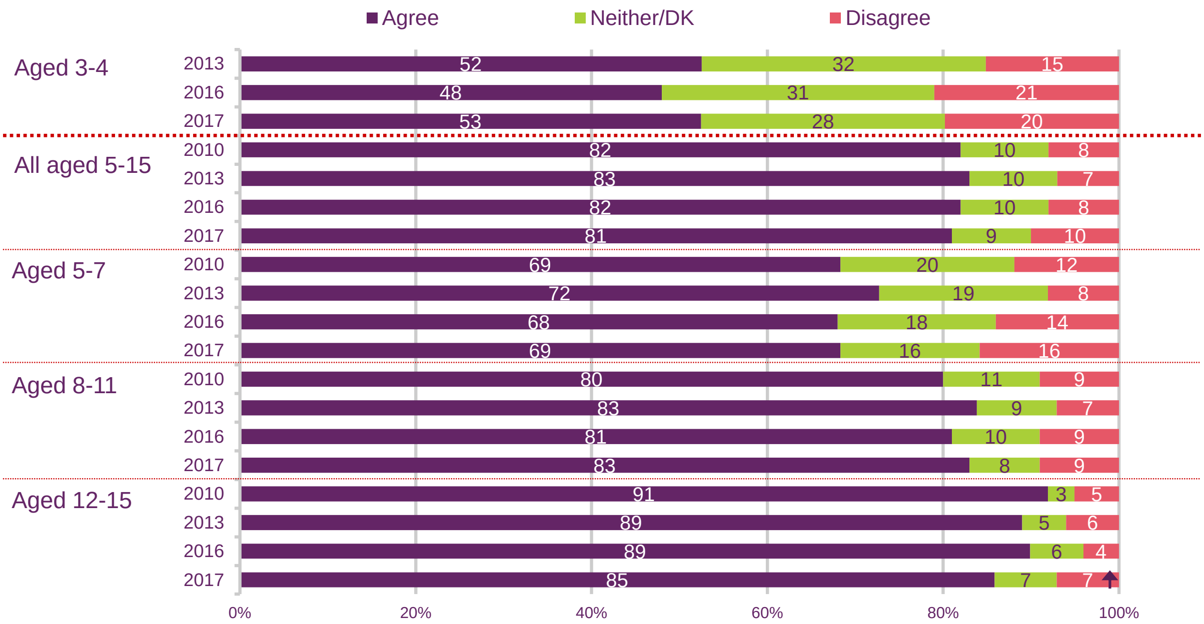
Most parents of 5-15s say they trust their child to use the internet safely

Parents of children aged 3-4 and 5-15 who go online were asked about the extent to which they agreed or disagreed with a range of statements about their child's use of the internet.

There has been no change since 2016 in the extent to which parents of 3-4s or 5-15s say they trust their child to use the internet safely.

Figure 119 shows that half of parents of 3-4s agree with the statement "I trust my child to use the internet safely" (53%). A majority of parents of 5-15s also agree with this statement (81%). Parents' agreement that they trust their child is higher for parents of 8-11s (83%) and 12-15s (85%) than among parents of 5-7s (69%).

Figure 119: Parental agreement with "I trust my child to use the internet safely", among those whose child goes online at home (2010, 2013) at home or elsewhere (2016, 2017), by age



QP48B – Please tell me the extent to which you agree or disagree with these statements in relation to your child? (prompted responses, single coded).

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

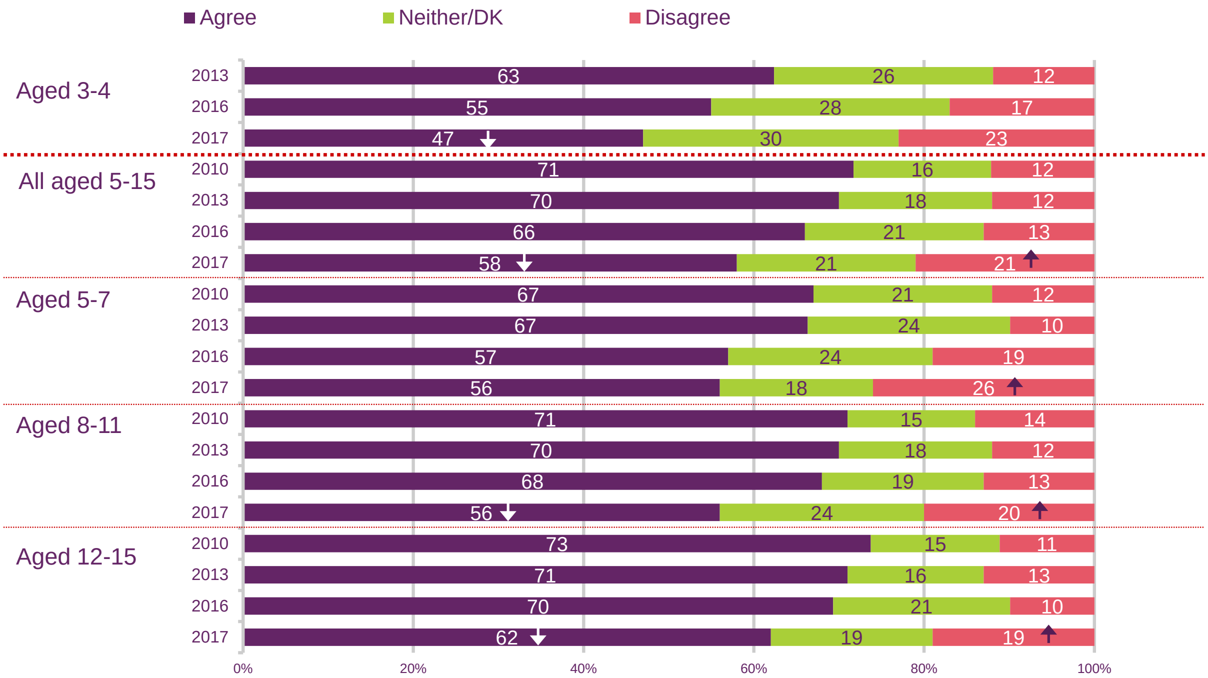
The majority of parents of 5-15s continue to feel that the benefits of the internet outweigh the risks, but agreement is lower than in 2016

Close to half of parents of 3-4s who go online (47%) agree that the benefits of the internet outweigh the risks, while around one in five disagree (23%). Close to six in ten parents of 5-15s who go online also agree with this statement (58%), while around one in five (21%) disagree.

Parents of 12-15s (62%) are more likely than parents of 3-4s (47%), 5-7s (56%) or 8-11s (56%) to agree.

Parents of children in each age group, apart from parents of 5-7s, are less likely than in 2016 to agree that the benefits of the internet outweigh the risks; this decrease in agreement is evident for parents of 3-4s (47% vs. 55%), 8-11s (56% vs. 68%), 12-15s (62% vs. 70%) and of 5-15s as a whole (58% vs. 66%). While a minority of parents disagree that the benefits of the internet outweigh the risks, disagreement has increased since 2016 for parents of 5-15s as a whole (21% vs. 13%), parents of 5-7s (26% vs. 19%), parents of 8-11s (20% vs. 13%) and parents of 12-15s (19% vs. 10%).

Figure 120: Parental agreement with "The benefits of the internet for my child outweigh any risks", among those whose child goes online at home (2010, 2013) at home or elsewhere (2016, 2017), by age



QP48A – Please tell me the extent to which you agree or disagree with these statements in relation to your child? (prompted responses, single coded).

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

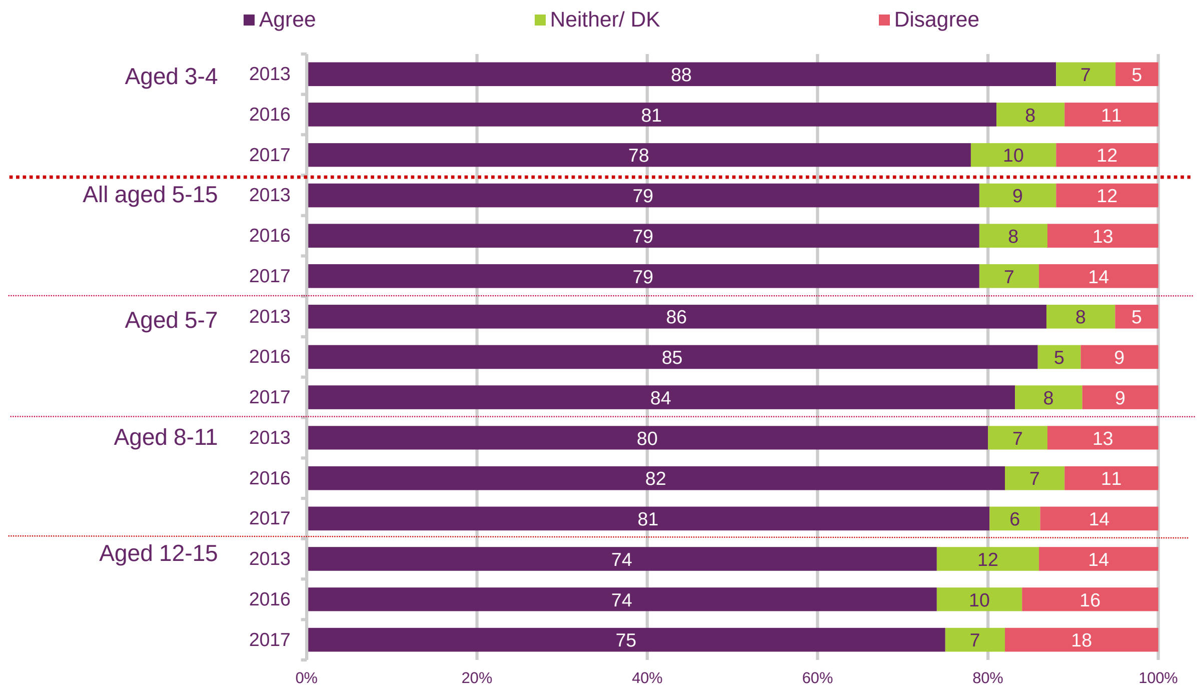
One in six parents of 12-15s feel they don't know enough to help their child manage online risks

Parents of children aged 3-4 and 5-15 who go online were asked the extent to which they agreed that: "I feel I know enough to help my child to manage online risks". The responses are shown in Figure 121, alongside responses to the 2013 statement: "I feel I know enough to help my child to stay safe when they are online", as given by parents of children in each age group who go online at home.

In 2017, as in 2016, eight in ten parents of 5-15s who go online (79%) agree with this statement. Parents of 3-4s (78%), 5-7s (84%) and 8-11s (81%) are more likely than parents of 12-15s (75%) to agree. Around one in seven (14%) parents of 5-15s disagree (either strongly or slightly) that they know enough to help their child to manage online risks, as do one in eight parents of 3-4s (12%). This increases to one in six (18%) for parents of 12-15s.

Compared to 2016 there has been no change in the extent to which parents of 3-4s or 5-15s agree or disagree with this statement.

Figure 121: Parental agreement with "I feel I know enough to help my child to manage online risks*" among those whose child goes online at home (2013), or elsewhere (2016, 2017), by age



QP48E – Please tell me the extent to which you agree or disagree with these statements in relation to your child (prompted responses, single coded).

**In 2013, this question referred to 'I feel I know enough to help my child to stay safe when they are online'*

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

Parental concerns about the internet

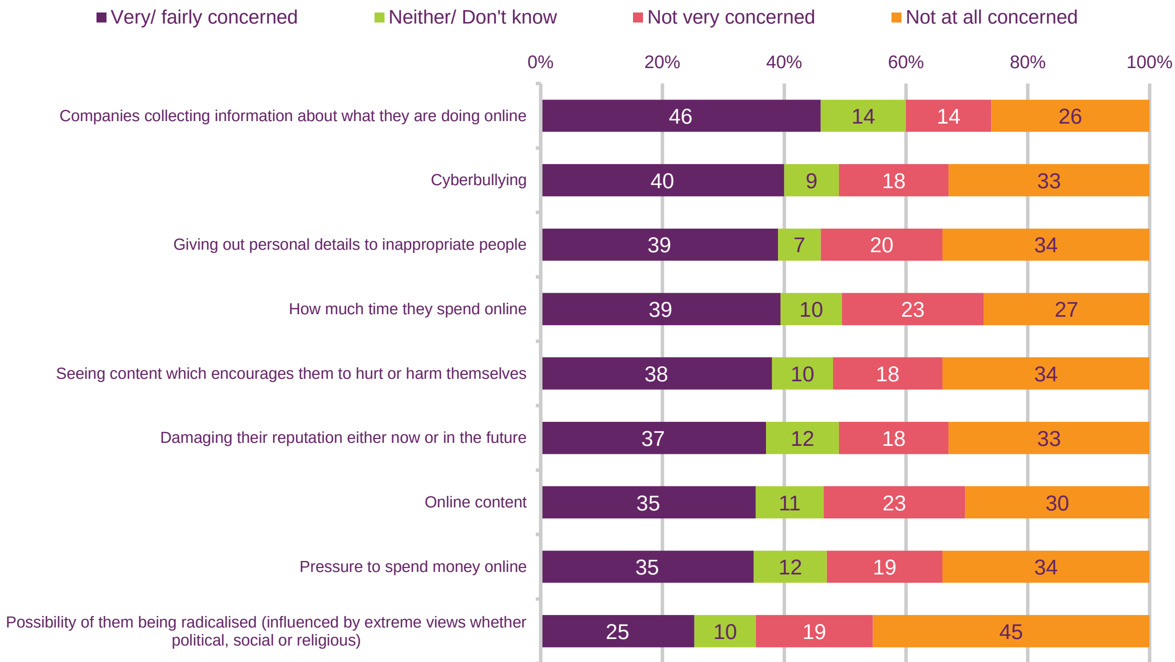
While a minority of parents say they have concerns about their child's online activities, concerns are more likely than in 2016

Figure 122 below summarises, in ranked order, the nine concerns about possible aspects of their child's online activities that parents of 5-15s who use the internet at home or elsewhere were asked about. A minority of parents of 5-15s are concerned (either very or fairly) about each of these aspects of their child's internet use.

More than four in ten parents of 5-15s are concerned about companies collecting information about what their child is doing online (46%). Five aspects are of concern to around four in ten parents of 5-15s who go online: cyberbullying (40%), their child giving out details to inappropriate people (39%), how much time their child spends online (39%), their child seeing content online that encourages them to harm themselves (38%) and their child damaging their reputation (37%). Around one in three are concerned about the content of the websites their child visits, or the pressure on their child to spend money online (both 35%). A quarter of parents are concerned about the possibility of their child being radicalised online (25%).

Subsequent figures in this section show each of these ten concerns over time, among parents of 3-4s, 5-7s, 8-11s and 12-15s. In summary, since 2016, and where it is possible to make a comparison, parents of 5-15s are more likely to be concerned about seven of these nine potential concerns: cyberbullying, giving out details to inappropriate people, time spent online, seeing content which encourages them to harm themselves, their child damaging their reputation, online content and the possibility of their child being radicalised online.

Figure 122: Parental concerns about aspects of their child's internet use, 5-15s: 2017



QP51A-I – Please tell me the extent to which you are concerned about these possible aspects of your child's online activities (prompted responses, single coded).

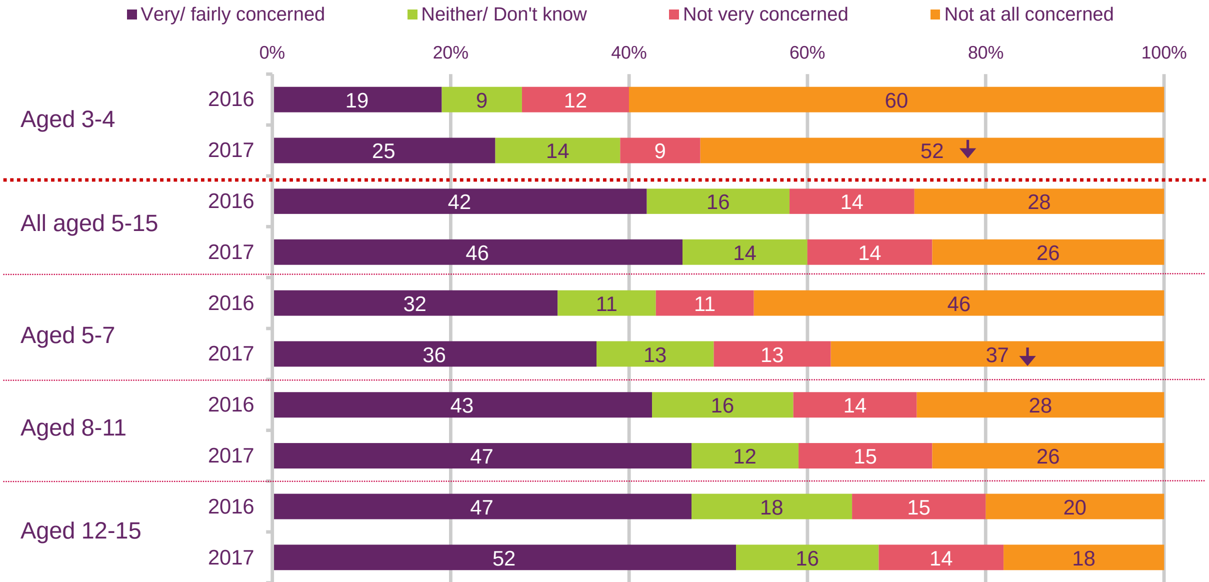
Base: Parents of children aged 5-15 who go online (1247).

Close to half of parents of 5-15s who go online are concerned about companies collecting information about what their child is doing online

As shown in Figure 123, close to half (46%) of parents of 5-15s who go online are concerned about companies collecting information about what their child is doing online (e.g. what they have been looking at online/ sites they have visited, etc.). Concern is more likely among parents of 8-11s (47%) and 12-15s (52%) than among parents of 3-4s (25%) and parents of 5-7s (36%).

Levels of concern are unchanged since 2016 among parents of 3-4s and 5-15s.

Figure 123: Parents' concerns about companies collecting information about what their child is doing online, by age: 2016, 2017



QP51I - Please tell me the extent to which you are concerned about these possible aspects of your child's online activities – Companies collecting information about what they are doing online (e.g. what they have been looking at online/ sites they have visited etc.).

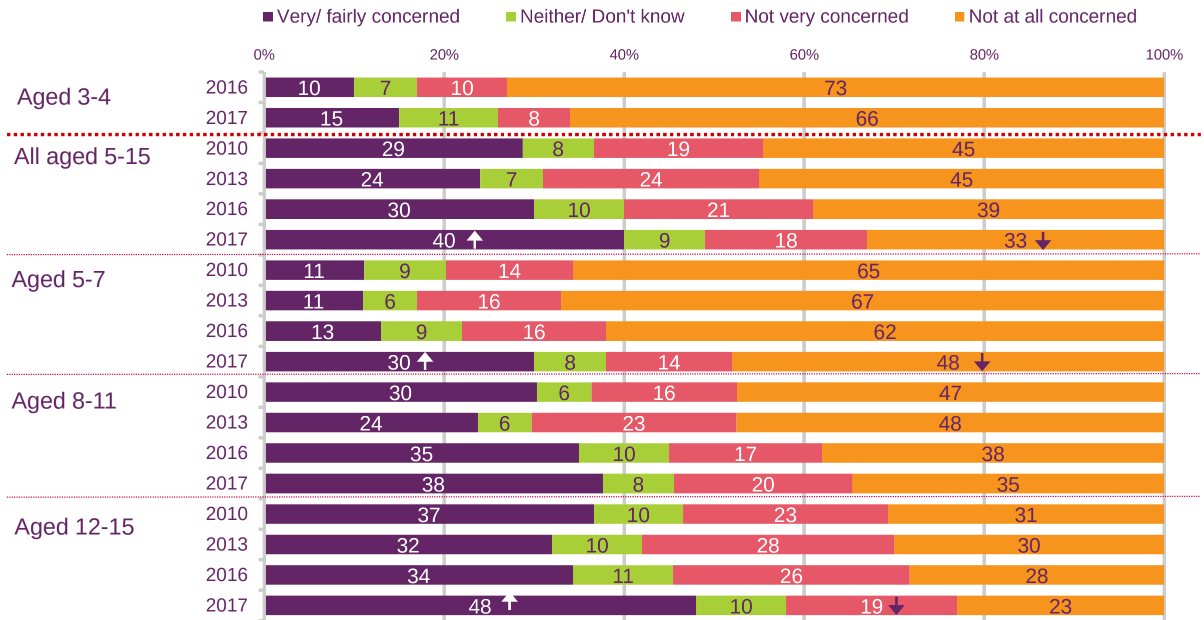
Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

Close to half of parents of 12-15s whose child goes online are concerned about online bullying, an increase since 2016

Four in ten (40%) parents of 5-15s, and one in seven parents of 3-4s (15%), are concerned about their child being bullied online. Concern increases with the age of the child, from 30% among parents of 5-7s, 38% for parents of 8-11s, and close to half of parents of 12-15s (48%).

Parents of 5-15s whose child goes online are more likely compared to 2016 to say they are concerned about their child being bullied online (40% vs. 30%); this increase in concern is also evident among parents of 5-7s (30% vs. 13%) and 12-15s (48% vs. 34%).

Figure 124: Parents' concerns about online bullying among those whose child goes online at home (2010, 2013) or elsewhere (2016, 2017), by age



QP51E- Please tell me the extent to which you are concerned about these possible aspects of your child's online activities – Them being bullied online (prompted responses, single coded).

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

Four in ten parents of children aged 5-15 are concerned that their child may be giving out personal details to inappropriate people, an increase since 2016

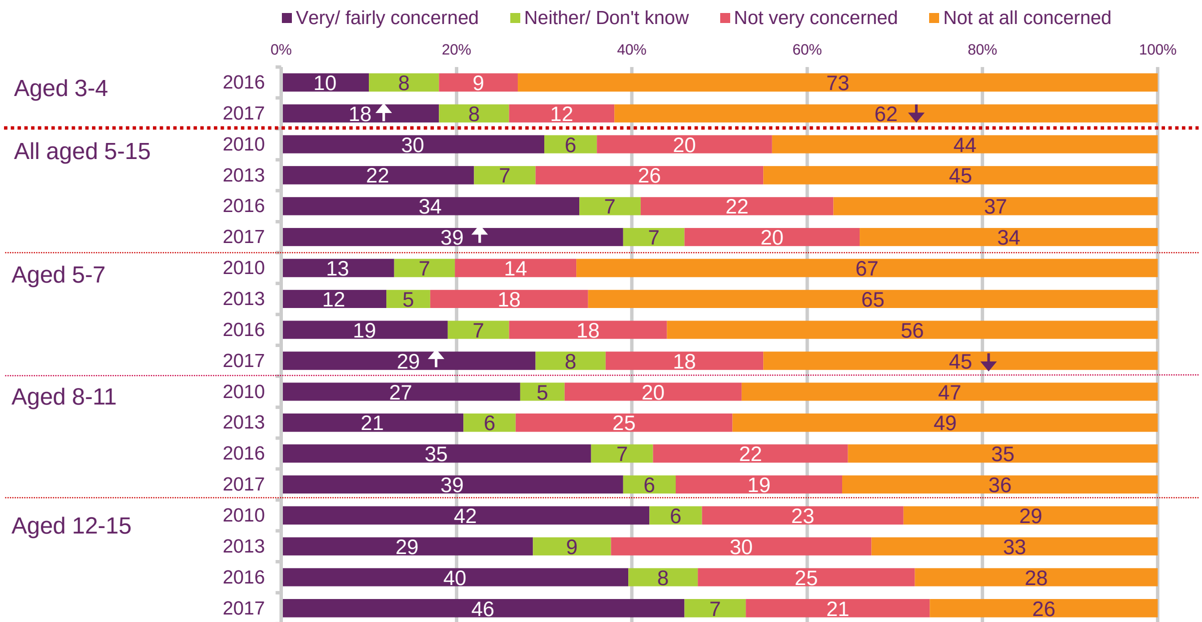
Parents of 5-15s who go online were asked how concerned they were about their child giving out personal information online to inappropriate people, as shown in Figure 125.

Two in ten parents of 3-4s (18%) and four in ten parents of children aged 5-15 (39%) are concerned that their child may be giving out personal details to inappropriate people.

Parents of 8-11s (39%) and 12-15s (46%) are more likely than parents of 3-4s (18%) or 5-7s (29%) to be concerned.

Parents of 5-15s whose child goes online are more likely than in 2016 to say they are concerned about their child giving out personal information online to inappropriate people (39% vs. 34%); this increase in concern is also evident among parents of 5-7s (29% vs. 19%). Parents of 3-4s are also more likely than in 2016 to say they are concerned about their child giving out personal information online to inappropriate people (18% vs. 10%).

Figure 125: Parental concerns about their child giving out personal details online to inappropriate people, among those whose child goes online at home (2010, 2013) or elsewhere (2016, 2017), by age



QP51D – Please tell me the extent to which you are concerned about these possible aspects of your child's online activities – Them giving out their personal details to inappropriate people (prompted responses, single coded).

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

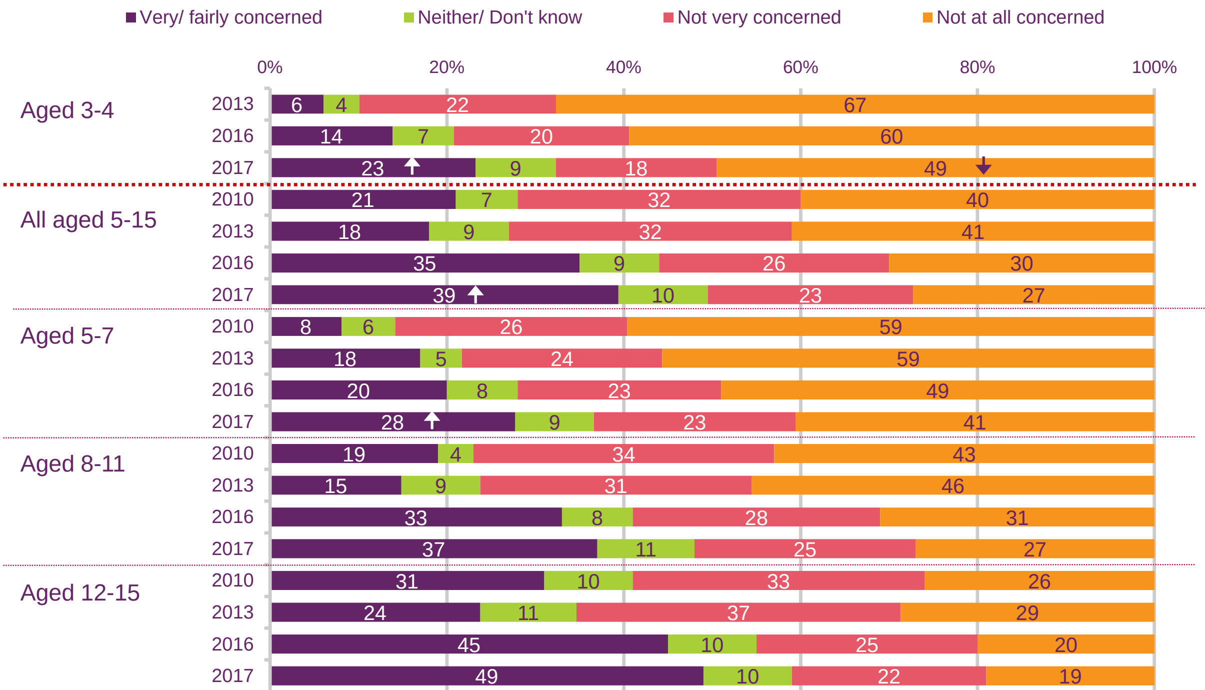
Parents of 3-4s and 5-7s who go online are more likely than in 2016 to say they are concerned about the time their child spends online

As summarised at the start of this section, parents whose child goes online were asked about the extent to which they were concerned about the length of time their child spends online. As shown in Figure 126, parental concern increases with the age of the child: from a quarter of parents of 3-4s who go online (23%) to half of parents of 12-15s (49%).

Parents of 12-15s are more likely to say they are 'very' or 'fairly' concerned (49%) than they are to say they are 'not very' or 'not at all' concerned (41%). For all other age groups parents are more likely to say they are not concerned than concerned.

Parents of 5-15s whose child goes online are more likely than in 2016 to say they are concerned about how much time their child spends online (39% vs. 35%); this increase in concern is also evident among parents of 5-7s (28% vs. 20%). Parents of 3-4s are also more likely than in 2016 to say they are concerned about how much time their child spends online (23% vs. 14%).

Figure 126: Parental concerns about how much time their child spends online, among those whose child goes online at home (2010, 2013) or elsewhere (2016, 2017), by age



QP51B - Please tell me the extent to which you are concerned about these possible aspects of your child's online activities – How much time they spend online.

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

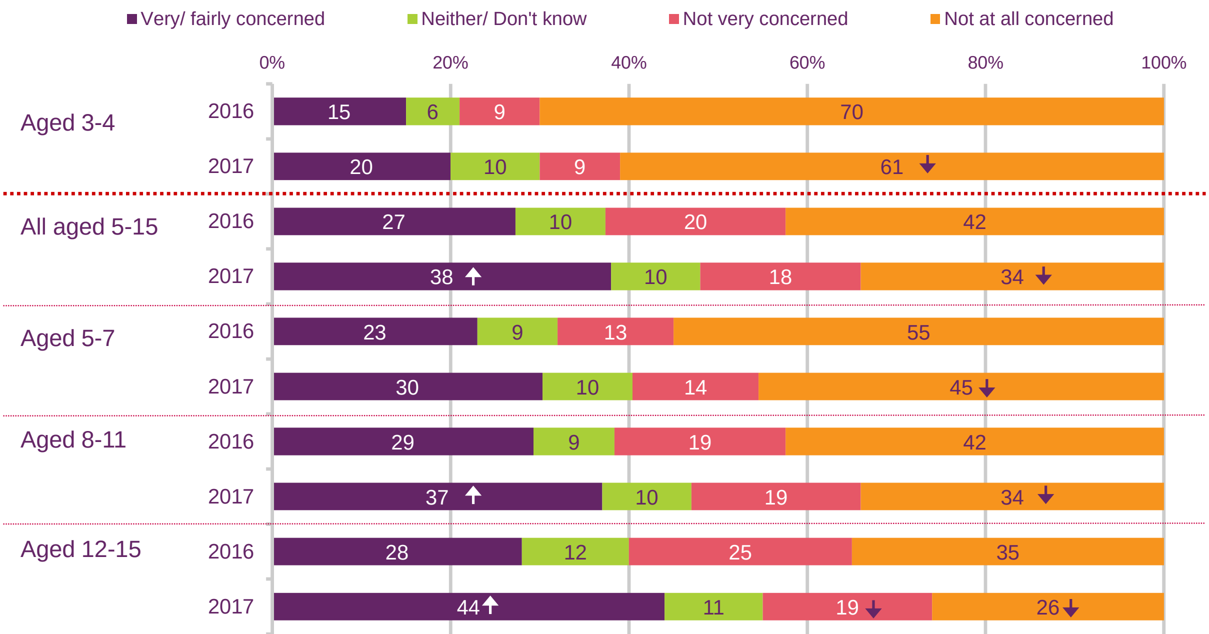
Around four in ten parents of 5-15s are concerned about their child seeing content which encourages them to harm themselves, an increase since 2016

One in five parents of 3-4s (20%) and close to four in ten parents of 5-15s who go online (38%) are concerned about their child seeing content which encourages them to hurt or harm themselves, as shown in Figure 127.

Concern increases with the age of the child, from 30% among parents of 5-7s, 37% for parents of 8-11s to more than four in ten parents of 12-15s (44%).

Compared to 2016, parents of 5-15s are more likely to say they are concerned about their child seeing content which encourages them to hurt or harm themselves (38% vs. 27%); this overall increase is evident for both 8-11s (37% vs. 29%) and 12-15s (44% vs. 28%).

Figure 127: Parents' concerns about their child seeing content which encourages them to harm themselves, by age: 2016, 2017



QP51G - Please tell me the extent to which you are concerned about these possible aspects of your child's online activities – Seeing content which encourages them to hurt or harm themselves.

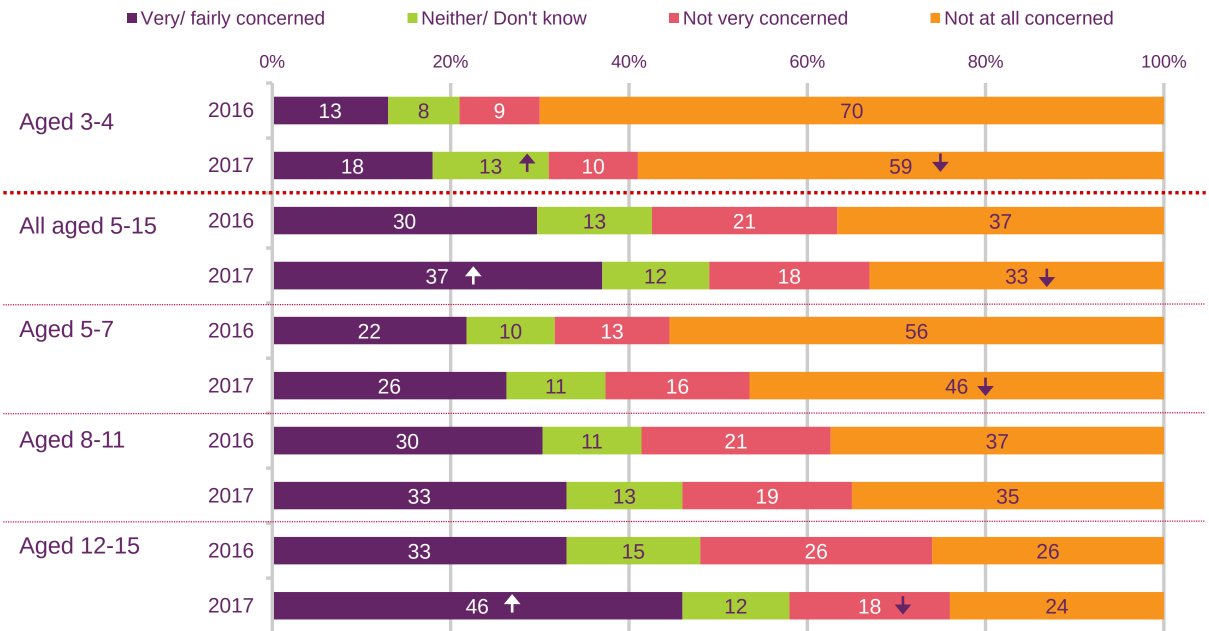
Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

Close to half of parents of 12-15s are concerned about their child damaging their reputation as a result of their online activities, an increase since 2016

Close to four in ten (37%) parents of 5-15s who go online are concerned about their child damaging their reputation, either now or in the future, as a result of their online activities (Figure 128). Concern is lower among parents of 3-4s (18%) and 5-7s (26%) than among parents of 8-11s (33%) or 12-15s (46%).

Parents of 5-15s whose child goes online are more likely than in 2016 to say they are concerned about their child damaging their reputation (37% vs. 30%); this overall increase in concern is evident among parents of 12-15s (46% vs. 33%), but is unchanged for other age groups.

Figure 128: Parents' concerns about their child damaging their reputation, by age: 2016, 2017



QP51F - Please tell me the extent to which you are concerned about these possible aspects of your child's online activities – Damaging their reputation either now or in the future.

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

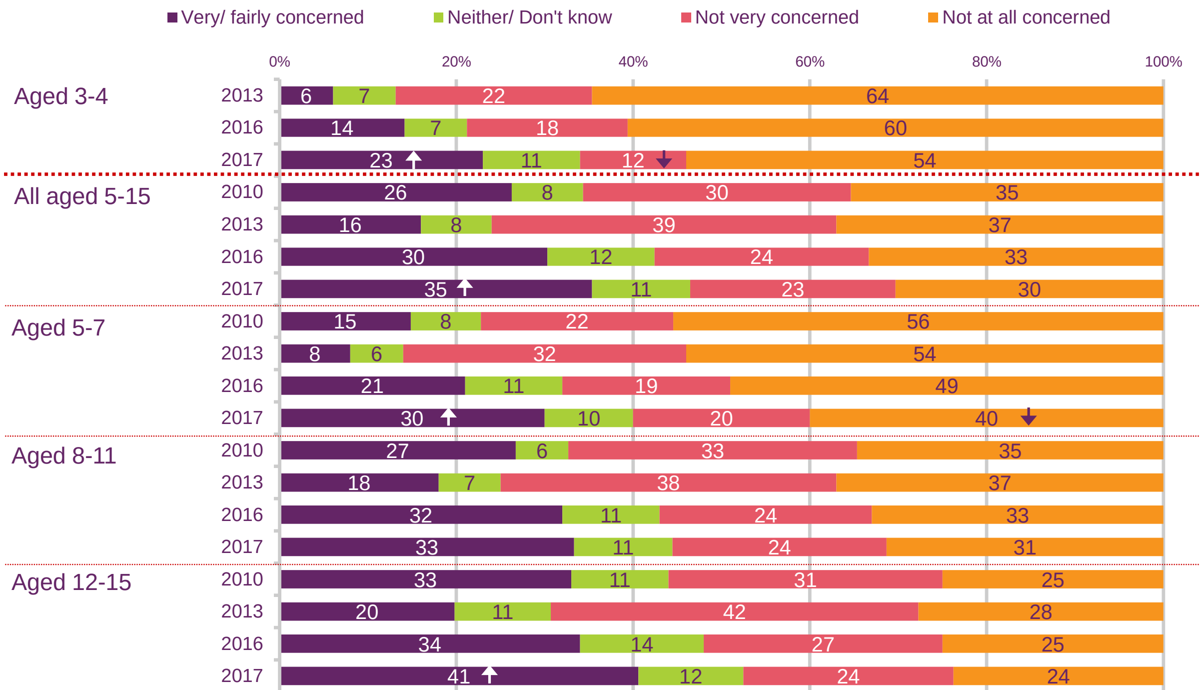
One-third of parents of 5-15s are concerned about the online content their child is exposed to, an increase since 2016

Parents of children aged 3-4 and 5-15 who go online were asked about the extent of their concerns relating to online content, as shown in Figure 129.

While a quarter of parents of 3-4s who go online (23%) are concerned about the content of the websites or apps their child visits, this rises to a third (35%) for parents of 5-15s. Among parents of 5-15s, concern is higher for 12-15s (41%) than for 5-7s (30%) and 8-11s (33%).

Parents of 5-15s are more likely than in 2016 to say they are concerned (35% vs. 30%); this increase in concern is seen among parents of 5-7s (30% vs. 21%) and 12-15s (41% vs. 34%). Parents of 3-4s are also more likely than in 2016 to say they are concerned about the content of websites or apps their child visits (23% vs. 14%).

Figure 129: Parental concerns about online content, among those whose child goes online at home (2010, 2013) or elsewhere (2016, 2017), by age



QP51A – Please tell me the extent to which you are concerned about these possible aspects of your child's online activities – The content on the websites or apps that they visit (prompted responses, single coded). Apps was added in 2015.*

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

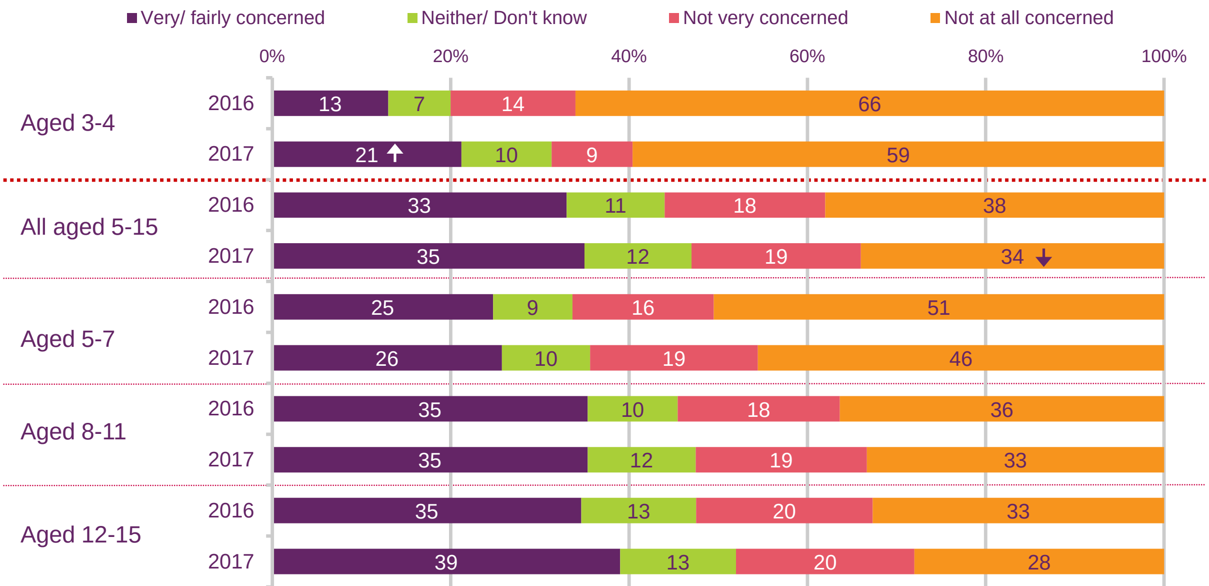
One in three parents of 5-15s are concerned about the pressure on their child to spend money online

Parents of children aged 3-4 and 5-15 who go online were asked about the extent of any concern relating to pressure on their child to spend money online. The results are shown in Figure 130.

About a third of parents of 5-15s (35%) are concerned about the pressure on their child to spend money online. Concern is higher among parents of 8-11s (35%) and 12-15s (39%) and lower for parents of 3-4s (21%) and 5-7s (26%).

Compared to 2016, there is no change in the level of concern among parents of 5-15s. Parents of 3-4s are now more likely to say they are concerned about the pressure on their child to spend money online (21% vs. 13%).

Figure 130: Parents' concerns about their child being under pressure to spend money online, by age: 2016, 2017



QP51H - Please tell me the extent to which you are concerned about these possible aspects of your child's online activities – The pressure on them to spend money online.

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

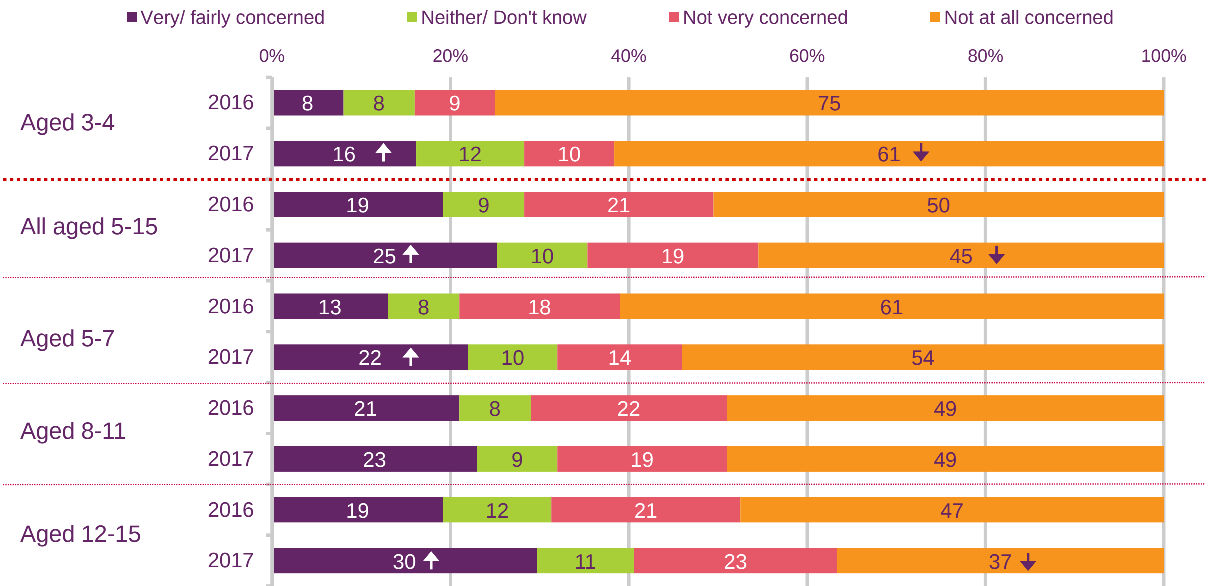
One in four parents of 5-15s who go online are concerned about the potential for their child to be radicalised online, an increase compared to 2016

As shown in Figure 131, a quarter (25%) of parents of 5-15s who go online are concerned about the possibility of their child being radicalised online (e.g. influenced by extreme views, whether political, social or religious).

Concern is higher among parents of 12-15s (30%) than among parents of 8-11s (23%), 5-7s (22%) or 3-4s (16%).

Parents of 5-15s whose child goes online are more likely than in 2016 to say they are concerned about the possibility of their child being radicalised online (25% vs. 19%); this increase in concern is also evident among parents of 5-7s (22% vs. 13%) and parents of 12-15s (30% vs. 19%). Parents of 3-4s are also more likely than in 2016 to say they are concerned about the possibility of their child being radicalised online (16% vs. 8%).

Figure 131: Parents' concerns about the possibility of their child being radicalised online: 2016, 2017



QP51J - Please tell me the extent to which you are concerned about these possible aspects of your child's online activities – The possibility of my child being radicalised e.g. influenced by extreme views online whether political, social or religious.

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

Parental concerns about mobile phones

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

Parents of 8-15s[100] whose child has their own mobile phone were asked about their concerns relating to their child's mobile phone use. For those parents whose child has a smartphone or other type of internet-enabled mobile phone, the online concerns covered in the preceding section are relevant here. There are, however, specific concerns that relate to the portable and personal nature of mobile phones. These are:

- whom their child is in contact with via their mobile phone;
- how much time their child spends using their mobile phone; and
- their child being bullied via calls/ texts/ emails/ messages to their phone.

In summary, a minority of parents of 8-11s and 12-15s say they have concerns about these aspects of their child's mobile phone use, as was also the case in 2016. Unlike the findings from 2016, however, parents of 12-15s are more likely than parents of 8-11s to have each of the three concerns. Previously, the only variation in concern by age related to the time 12-15s spend using their phone.

There was an increase in each of these three concerns among parents of 12-15s since 2016, but no change for parents of 8-11s.

[100] Parents of 3-4s and 5-7s whose child has their own mobile phone were also asked this question, but too few children in these age groups have a mobile phone to include their results in this section.

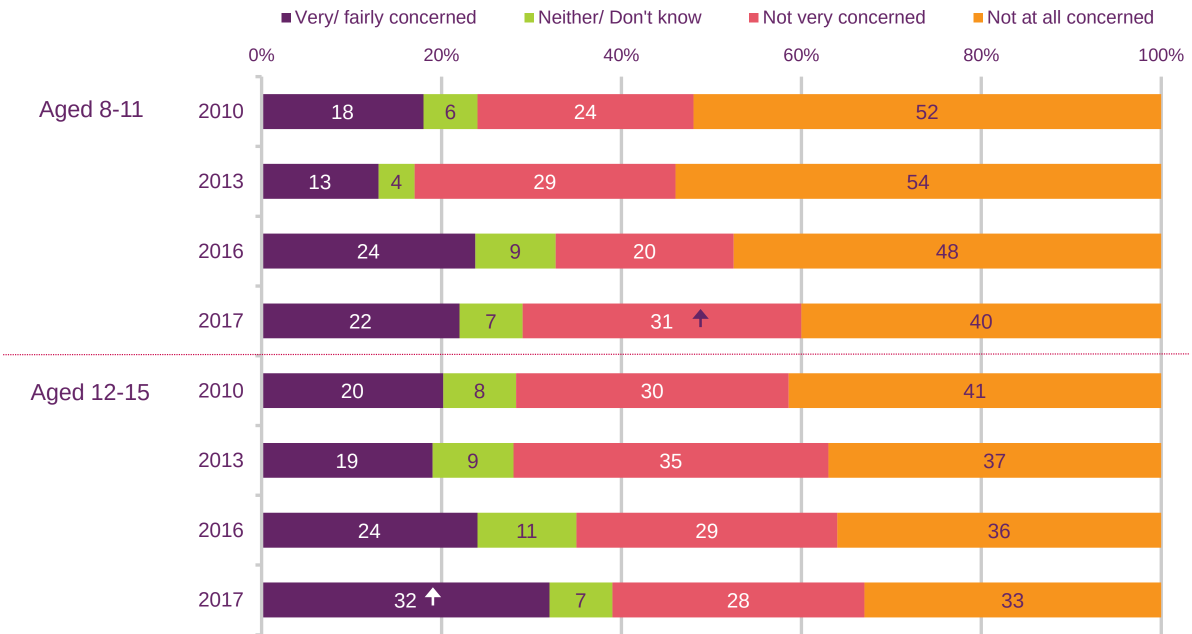
One-third of parents of 12-15s are concerned about whom their child is in contact with on their mobile phone, an increase since 2016

Figure 132 shows responses from parents of 8-11s and 12-15s regarding concerns about whom their child may be in contact with via their mobile phone.

One in five (22%) parents of 8-11s and a third (32%) of parents of 12-15s are concerned (very or fairly) about whom their child may be in contact with via their mobile phone. As such, concern among parents of 12-15s is more likely than among parents of 8-11s, which was not evident in 2016.

Compared to 2016, parents of 8-11s are now more likely to say they are 'not very' concerned about whom their child is in contact with (31% vs. 20%), while parents of 12-15s are now more likely to say they are concerned (32% vs. 24%).

Figure 132: Parents' concerns about whom their child is in contact with via their mobile, by age: 2010, 2013, 2016 and 2017



QP60B – Please tell me the extent to which you are concerned about these aspects of your child's mobile phone use - Who they are in contact with using their mobile phone. (prompted responses, single coded).

Base: Parents of children whose child has their own mobile phone (199 aged 8-11, 407 aged 12-15). Significance testing shows any change between 2016 and 2017.

.

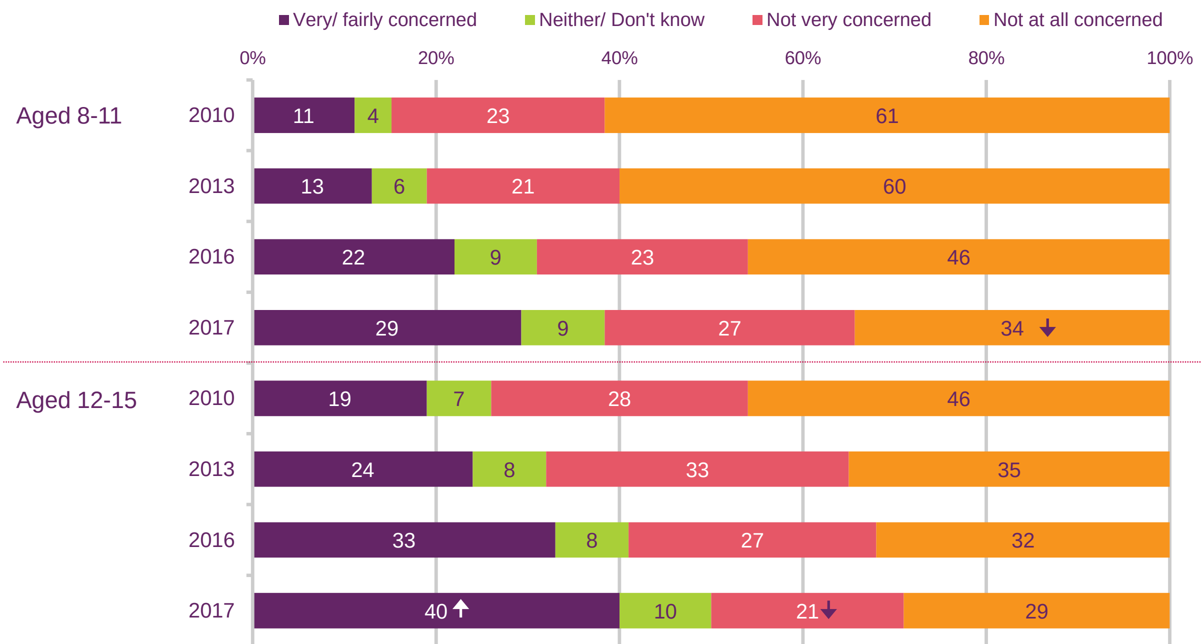
Four in ten parents of 12-15s are concerned about how much time their child spends using their mobile phone, an increase since 2016

Figure 133 shows responses from parents of 8-11s and 12-15s regarding concerns about how much time their child spends using their mobile phone, as summarised at the beginning of this section.

Parents of 8-11s and 12-15s are still more likely to say they are not concerned than concerned about this aspect of their child's mobile phone use, with concern remaining higher among parents of 12-15s (40%) than among parents of 8-11s (29%).

Compared to 2016, parents of 12-15s are now more likely to say they are concerned about how much time their child spend using their mobile phone (40% vs. 33%), while parents of 8-11s are no more likely to be concerned, but are now less likely to say they are 'not at all' concerned (34% vs. 46%).

Figure 133: Parents' concerns about how much time their child spends using the phone, by age: 2010, 2013, 2016 and 2017



QP60A – Please tell me the extent to which you are concerned about these aspects of your child's mobile phone use – How much time they spend using the phone (prompted responses, single coded).

Base: Parents of children whose child has their own mobile phone (199 aged 8-11, 407 aged 12-15). Significance testing shows any change between 2016 and 2017.

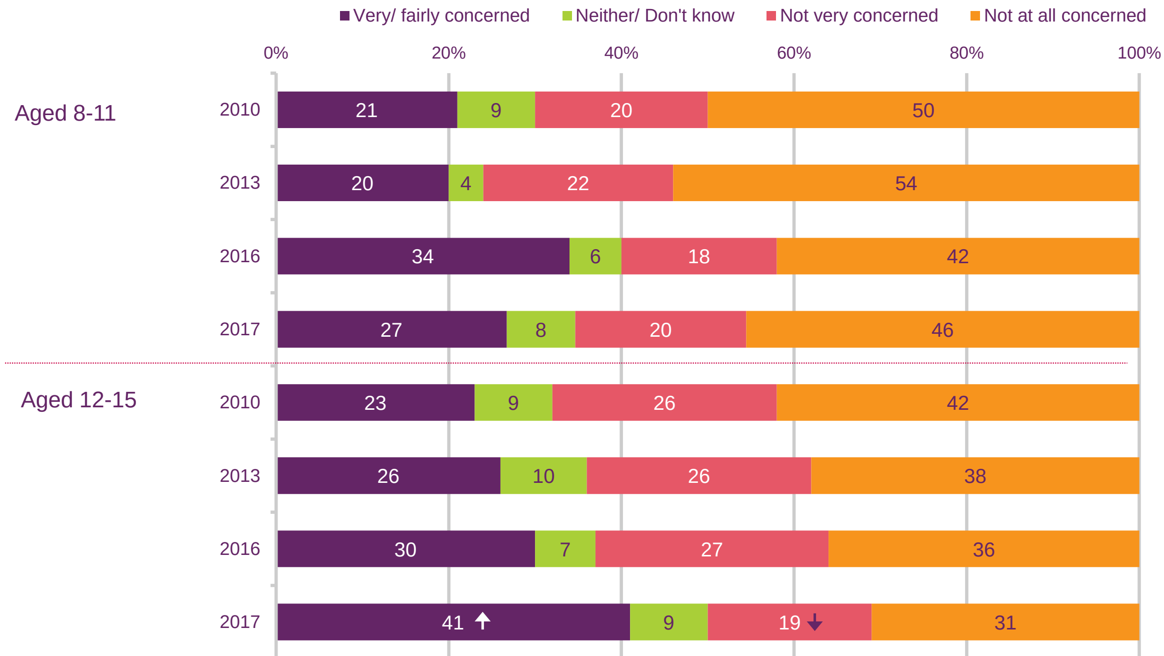
Four in ten parents of 12-15s say they are concerned about their child being bullied through their mobile phone, an increase since 2016

Parents of children aged 5-15 with their own mobile phone were asked about the extent of their concern about their child being bullied via calls/ texts/ emails/ messages to their mobile phone. The responses are shown in Figure 134.

A quarter of parents of 8-11s (27%) and four in ten parents of 12-15s (41%) say they are concerned about their child being bullied through their mobile phone. As such, concern among parents of 12-15s is more likely than among parents of 8-11s, which was not evident in 2016.

Compared to 2016, parents of 12-15s are now more likely to say they are concerned about their child being bullied through their mobile phone (41% vs. 30%), with no change for parents of 8-11s.

Figure 134: Parents' concerns about their child being bullied via calls/ texts/ emails to the child's mobile phone by age: 2010, 2013, 2016, 2017



QP60D – Please tell me the extent to which you are concerned about these aspects of your child's mobile phone use/- Being bullied via calls/ texts/ emails/ messages to their mobile phone (prompted responses, single coded).

Base: Parents of children whose child has their own mobile phone (199 aged 8-11, 407 aged 12-15). Significance testing shows any change between 2016 and 2017.

Parental concerns about gaming

A minority of parents express concerns about their child's game playing

Parents whose child plays games on any type of device were asked about six concerns relating to their child's gaming. Some of the online concerns outlined earlier may also apply here, given the online nature of some types of gaming. This section therefore looks in detail at those concerns more likely to be generally related to gaming:

- the content of the games the child is playing;
- with whom they are playing (asked of those whose child plays online games);
- the possibility of their being bullied by other players;
- the amount of advertising in games;
- the pressure on the child to make in-game purchases, e.g. for additional points, tokens or levels, game upgrades or add-ons; and
- how much time the child spends gaming.

In summary, a minority of parents of 3-4s and 5-15s say they have concerns about these aspects of their child's gaming.

Where possible, subsequent figures in this section show the trend over time for each of these six concerns among parents of 3-4s, 5-7s, 8-11s and 12-15s.

Compared to 2016, parents of 5-15s are now more likely to be concerned about each of these six aspects related to their child's game playing, with parents of 3-4s now more likely to be concerned about the possibility of their child being bullied.

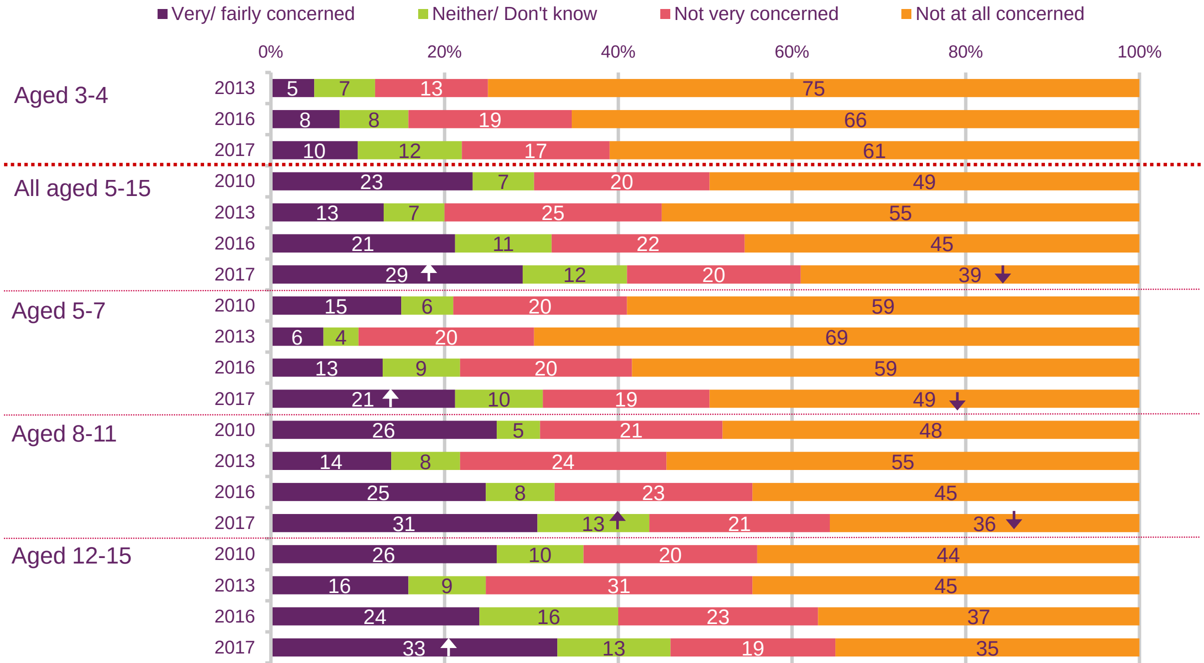
Three in ten parents of 5-15s who play games are concerned about gaming content, an increase since 2016

As discussed earlier and shown in Figure 111 to Figure 114, parents of children aged 3-4 and aged 5-15 who ever play games through a gaming device were asked how concerned they were about the content of the games that their child played. In addition to showing responses (Figure 135) among parents of 3-4s and 5-15s, responses are also broken out among parents of 5-7s, 8-11s and 12-15s.

A majority of parents of children in each age group say they are not concerned about the content of the games that their child plays. Parents of 3-4s (10%) and 5-7s (21%) are less likely to be concerned than parents of 8-11s (31%) and 12-15s (33%).

As shown earlier in Figure 114, parents of 5-15s are more likely than in 2016 to have concerns about gaming content (29% vs. 21%); this increase is evident among parents of 5-7s (21% vs. 13%) and parents of 12-15s (33% vs. 24%). There has been no change for parents of 3-4s.

Figure 135: Parents' concerns about gaming content among those whose child plays games at home (2010, 2013) at home or elsewhere (2016, 2017), by age



QP74A – Please tell me the extent to which you are concerned about these aspects of your child's games playing through any means – The content of the games they are playing (prompted responses, single coded).

Base: Parents whose child ever plays games (264 aged 3-4, 1028 aged 5-15, 266 aged 5-7, 393 aged 8-11, 369 aged 12-15). Significance testing shows any change between 2016 and 2017.

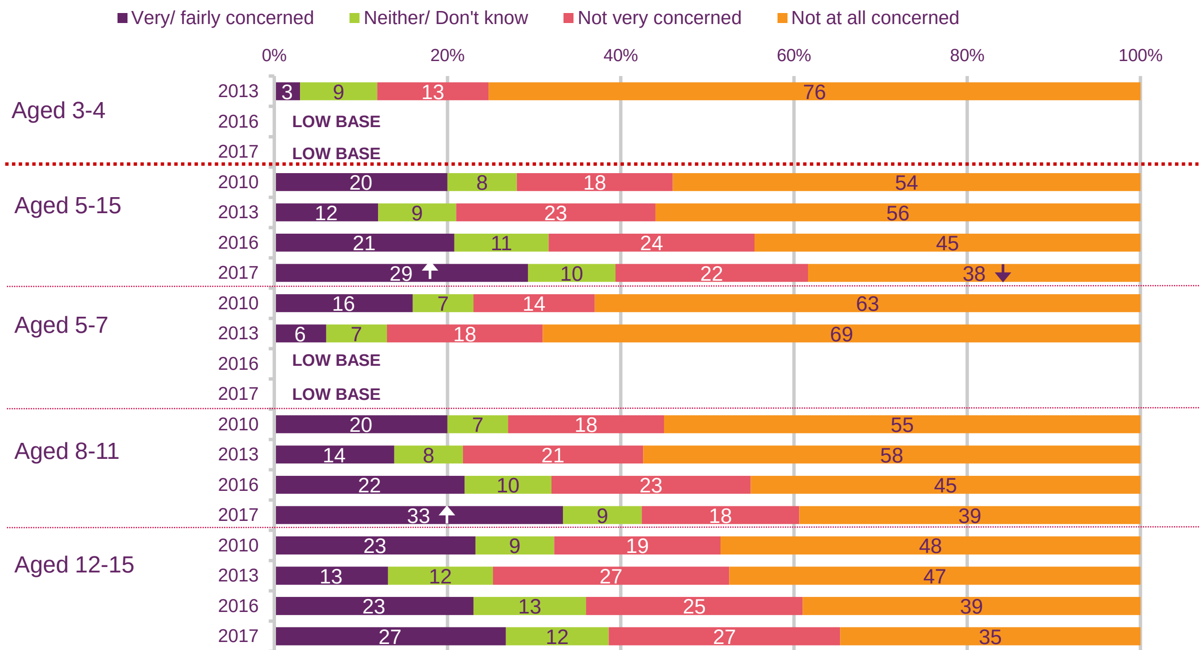
Three in ten parents of 5-15s say they are concerned about whom their child is playing online games with, an increase since 2016

Parents of children who ever play games online through a gaming device were asked how concerned they were about whom their child may be playing online games with.

As shown in Figure 136, three in ten parents of 5-15s (29%) say they are concerned about whom their child is playing online games with through the games player. Parents of 8-11s (33%) are as likely as parents of 12-15s (27%) to be concerned about this aspect of their child's gaming[101] .

Parents of 5-15s are more likely than in 2016 to have concerns about whom their child is playing online games with (29% vs. 21%); this increase is evident among parents of 8-11s (33% vs. 22%).

Figure 136: Parents concerns about whom their child is gaming with through the games player, among those whose child plays games online at home (2010, 2013) at home or elsewhere (2016, 2017), by age



*QP74C– Please tell me the extent to which you are concerned about these aspects of your child's games playing through any means – Who they are playing online games with (prompted responses, single coded) *Since 2014 this question was only asked of those parents who said their child played games online, in earlier years parents were allowed to state Not Applicable if their child does not play online games.*

Base: Parents whose child ever plays games (264 aged 3-4, 1028 aged 5-15, 266 aged 5-7, 393 aged 8-11, 369 aged 12-15). Significance testing shows any change between 2016 and 2017.

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[101] The base for parents of children aged 3-4 and 5-7 who play games online is too low for their results to be included

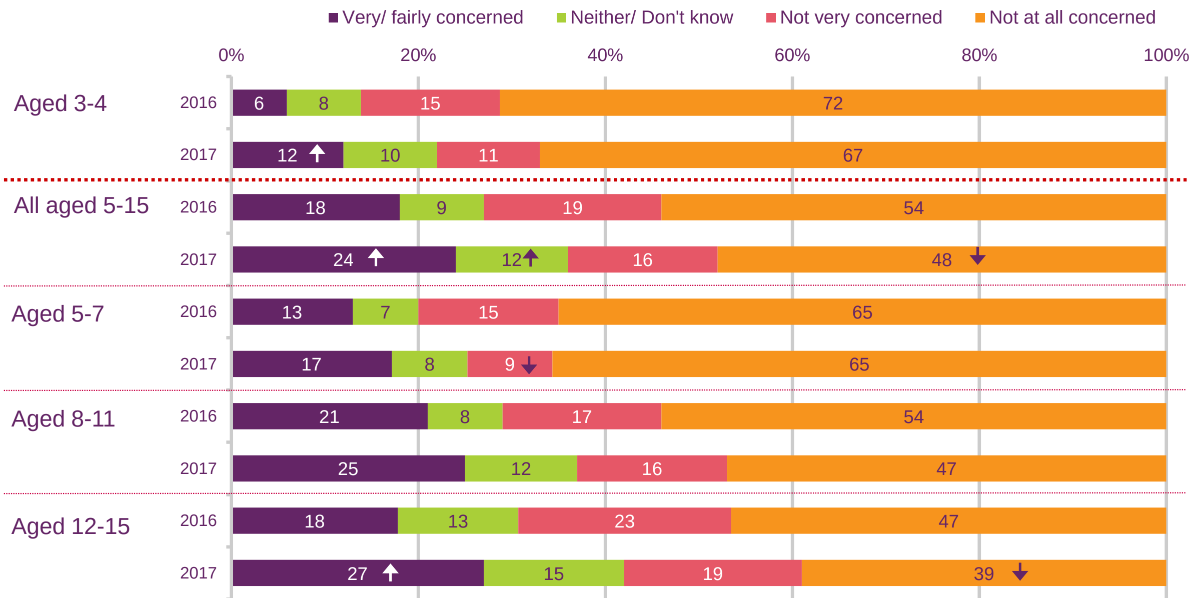
Parents of 12-15s are more likely than in 2016 to say they are concerned about their child being bullied when gaming

Parents whose child ever plays games through a gaming device, at home or elsewhere, were asked how concerned they were about the possibility of their child being bullied by other players. Responses from parents of children in each age group are shown in Figure 137.

Levels of concern about their child being bullied by other players are lower among parents of 3-4s (12%) and parents of 5-7s (17%) than among parents of 8-11s (25%) and parents of 12-15s (27%).

Parents of 3-4s are more likely than in 2016 to have concerns about their child being bullied by other players (12% vs. 6%). Concerns are also higher than in 2016 among parents of 5-15s (24% vs. 18%); this increase is evident among parents of 12-15s (27% vs. 18%).

Figure 137: Parents' concerns about the possibility of the child being bullied by other players: 2016, 2017



QP74E – Please tell me the extent to which you are concerned about these aspects of your child's games playing through any means - The possibility of them being bullied by other players (prompted responses, single coded).

Base: Parents whose child ever plays games (264 aged 3-4, 1028 aged 5-15, 266 aged 5-7, 393 aged 8-11, 369 aged 12-15). Significance testing shows any change between 2016 and 2017.

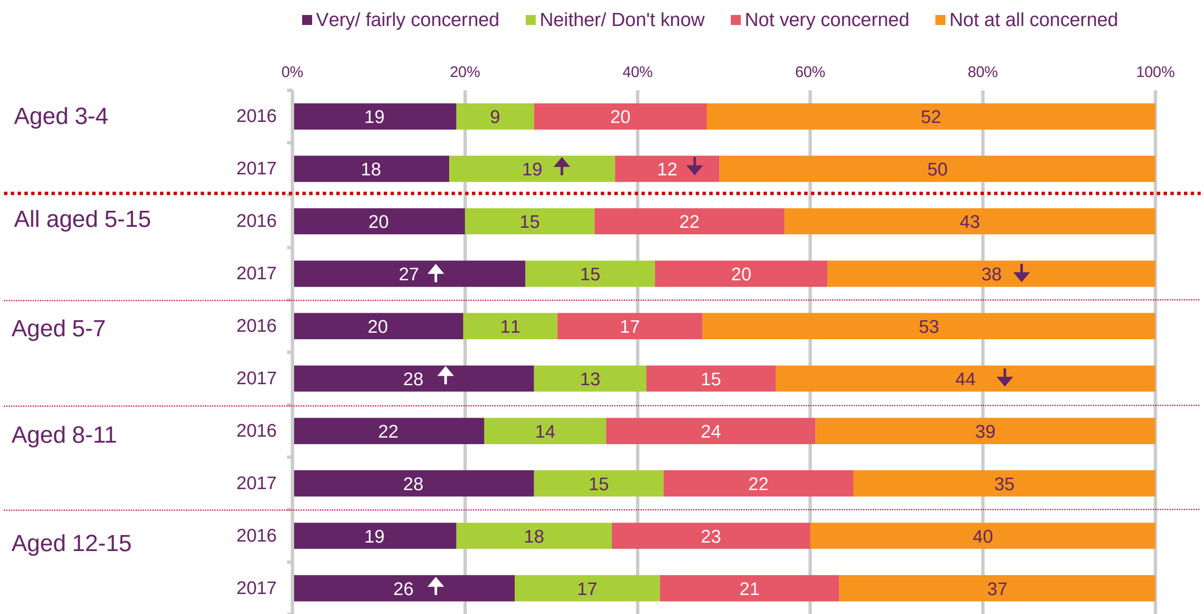
A quarter of parents of 5-15s are concerned about the amount of advertising in games, an increase since 2016

Parents whose child ever plays games through a gaming device, at home or elsewhere, were asked about the extent to which they were concerned about the amount of advertising in games. The results are shown in Figure 138.

One in five parents of 3-4s (18%) and one quarter of parents of 5-15s (27%) whose child plays games say they are concerned about the amount of advertising in games. While this incidence is higher for parents of 5-15s compared to parents of 3-4s, there is no variation in the proportion concerned among parents of 5-7s, 8-11s and 12-15s.

Parents of 5-15s are more likely than in 2016 to have concerns about the amount of advertising in games (27% vs. 20%); this increase is evident among parents of children aged 5-7 (28% vs. 20%) and parents of 12-15s (26% vs. 19%).

Figure 138: Parents' concerns about the amount of advertising in games, by age: 2016, 2017



QP74F – Please tell me the extent to which you are concerned about these aspects of your child's games playing through any means – The amount of advertising in games (prompted responses, single coded).

Base: Parents whose child ever plays games (264 aged 3-4, 1028 aged 5-15, 266 aged 5-7, 393 aged 8-11, 369 aged 12-15). Significance testing shows any change between 2016 and 2017.

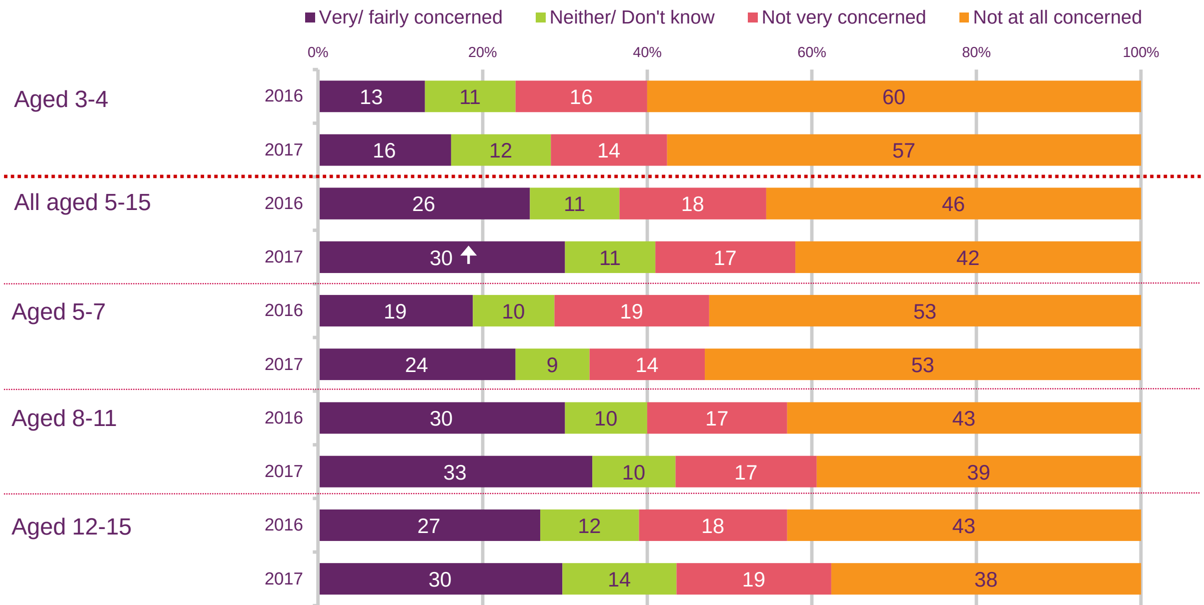
Three in ten parents of 5-15s who play games are concerned about the pressure on their child to make in-game purchases, an increase since 2016

As shown in Figure 139, twice as many parents of 5-15s (30%) as parents of 3-4s (16%) are concerned about the pressure on their child to make in-game purchases (for things like access to additional points, tokens or levels or for game upgrades or add-ons).

Concern is higher among parents of 8-11s (33%) and 12-15s (30%) than among parents of 3-4s (16%) and 5-7s (24%).

Parents of 5-15s are more likely than in 2016 to have concerns about the pressure on their child to make in-game purchases (30% vs. 26%), but this increase is not evident for any particular age group.

Figure 139: Parents' concerns about the pressure to make in-game purchases, by age: 2016, 2017



QP74D – Please tell me the extent to which you are concerned about these aspects of your child's games playing through any means - The pressure to make in game purchases for things like access to additional points/ tokens/ levels or for game upgrades or add-ons (prompted responses, single coded).

Base: Parents whose child ever plays games (264 aged 3-4, 1028 aged 5-15, 266 aged 5-7, 393 aged 8-11, 369 aged 12-15). Significance testing shows any change between 2016 and 2017.

.

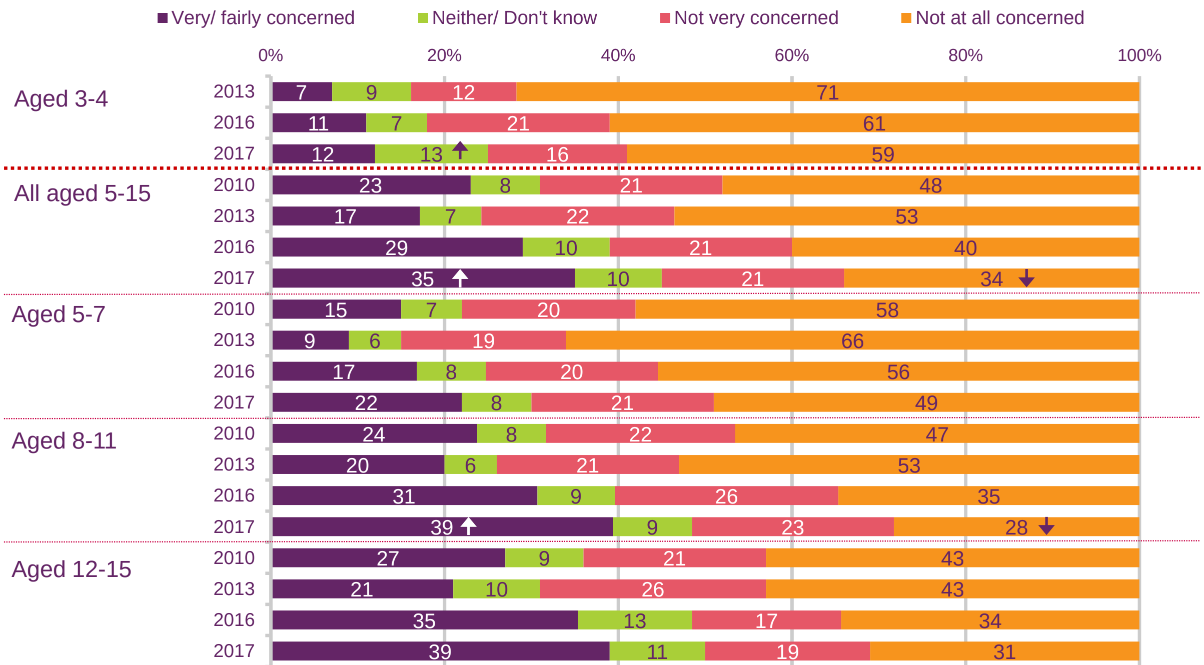
One-third of parents of 5-15s whose child plays games say they are concerned about how much time their child spends gaming

Figure 140 shows responses from parents of 3-4s and 5-15s whose child plays games, regarding concerns about how much time their child spends playing games, as summarised earlier in this section.

About one in ten parents of 3-4s (12%) and a third of parents of 5-15s (35%) are concerned about the amount of time their child spends playing games. Concern is lower among parents of 3-4s (12%) and 5-7s (22%) than parents of 8-11s and 12-15s (both 39%).

Parents of 5-15s are more likely than in 2016 to have concerns about how much time their child spends gaming (35% vs. 29%); this increase is seen among parents of 8-11s (39% vs. 31%).

Figure 140: Parents' concerns about time spent gaming, among those whose child plays games at home (2010, 2013) at home or elsewhere (2016, 2017), by age



QP74B – Please tell me the extent to which you are concerned about these aspects of your child's games playing through any means – How much time they spend playing games (prompted responses, single coded).

Base: Parents whose child ever plays games (264 aged 3-4, 1028 aged 5-15, 266 aged 5-7, 393 aged 8-11, 369 aged 12-15). Significance testing shows any change between 2016 and 2017.

Differences by gender and socio-economic group

Parents of boys aged 8-11 and 12-15 whose child plays games are more likely than parents of girls to say they have concerns about their child's gaming

There are relatively few differences by the gender of the child in parental attitudes and concerns, and these are summarised below:

- Parents of girls aged 5-7 (85%) are more likely than parents of boys (77%) to agree that "I think my child has a good balance between screen time and doing other things".
- Parents of girls aged 3-4 (34%) are more likely than parents of boys (25%) to have concerns about the amount of TV advertising seen by their child.
- Parents of boys aged 12-15 (48%) are more likely than parents of girls (30%) to have concerns about their child being under pressure to spend money online.

Most differences relate to parental concerns about gaming, as follows:

- Parents of boys aged 8-11 or aged 12-15 whose child plays games are more likely than parents of girls to be concerned about: with whom their child is playing online (45% vs. 31% for 8-11s, and 51% vs. 21% for 12-15s), and how much time they spend playing games (45% vs. 31% for 8-11s and 51% vs. 21% for 12-15s). Among parents of 12-15s, parents of boys (39%) are more likely than parents of girls (23%) to have concerns about the content of the games they are playing.

Compared to the average, parents of 5-15s in AB households are more likely to have concerns about their child's online use, while parents in DE households are less likely

There are more differences by household socio-economic group.

Compared to the average for 5-15s (30%), parents in DE socio-economic group households (20%) are less likely to have concerns about the amount of TV advertising their child sees, while those in AB households (40%) are more likely. This difference is also evident for concerns about the content of TV advertising seen; concerns are lower compared to the average (31%) for DE adults (20%) and higher for AB adults (41%). Parents of 3-4s in ABC1 households are more likely than their counterparts in C2DE households to say they have concerns about the content of TV advertising seen by their child.

Similarly, there are differences in concerns about the content of TV programmes: higher among ABC1 parents than C2DE parents of 3-4s (21% vs. 17%), higher than the average for 5-15s (31%) among AB parents (40%), and lower among DE parents (20%).

Concern among parents of 3-4s regarding pre-watershed content are also higher among ABC1 parents than among C2DE parents (24% vs. 17%), and lower compared to the average for 5-15s (28%) among DE parents (21%).

Concern among parents of 3-4s about the time spent watching television are higher among ABC1 parents than among C2DE parents (24% vs. 18%), and higher compared to the average for 5-15s (29%) among AB parents (38%).

Compared to the average for 5-15s (58%), parents in AB households (66%) are more likely to agree that "The benefits of the internet for my child outweigh any risks". However, parents in AB households are more likely than the average for 5-15s to say they are concerned about: companies collecting information about what their child is doing online (57% vs. 46%), their child giving out personal details to inappropriate people (48% vs. 39%), how much time their child spends online (47% vs. 39%), their child damaging their reputation (48% vs. 37%), and the online content seen by their child (44% vs. 35%). Parents in DE households are less likely than the average for 5-15s to say they are concerned about: companies collecting information about what their child is doing online (37% vs. 46%), how much time their child spends online (30% vs. 39%), and their child damaging their reputation (27% vs. 37%).

There is just one difference in concerns relating to mobile phones: parents of children aged 5-15s in AB households (45%) are more likely than average (36%) to have concerns about how much time their child spends using the phone.

Regarding gaming, parents of children aged 5-15 in AB households (31%) are more likely than average (24%) to have concerns about the possibility of their child being bullied by other players, and parents in AB households are more likely than the average for 5-15s (35% vs. 27%) to be concerned about the amount of advertising in games.

15. Parental mediation

This chapter provides an overview of how parents are mediating their children's access to and use of media, with a particular focus on their use of the internet.

It examines in detail four approaches to online mediation: regularly talking to children about staying safe online, rules about what children do online, supervision when online, and awareness and use of technical tools.

This chapter also explores how parents and children learn about online mediation and managing online risks. It then looks at approaches to mediation across the other media children use, including controls and rules for mobile phones, gaming and television services.

Key findings

- Parents use a combination of approaches to mediate their child's access to and use of online content and services, including: regularly[102] talking to their children about staying safe online, using technical tools, supervising their child, and using rules. Four in ten parents of 5-15s whose child ever goes online use all four types of approach (40%), but this is less likely among parents of 3-4s (16%). Nearly all parents of 3-4s (99%) and 5-15s (96%) use at least one of these approaches. One per cent of parents of 3-4s, and 4% of parents of 5-15s, do not therefore mediate their child's internet use in any of these ways, rising to 7% for parents of 12-15s.
- A majority of parents of both 3-4s and 5-15s who have home broadband and whose child goes online are aware of home network-level content filters (66% for 3-4s and 62% for 5-15s) and around two in five use them (39% for parents of 3-4s and 37% for parents of 5-15s).
- Use of home network-level content filters has increased by six percentage points since 2016 among parents of 5-15s (from 31%), and by 16 percentage points since 2014 (from 21%).
- Awareness levels for parental control software (software set up on a particular device used to go online, e.g. Net Nanny, McAfee Family Protection) are similar to network-level filters, at 64% among parents of 3-4s and 65% among parents of 5-15s. Parents of 5-15s are less likely to use parental control software than they are to use home network-level filters (31% vs. 37% for 5-15s).
- Awareness of parental control software among parents of 3-4s with broadband at home whose child goes online is unchanged compared to 2016, but use among this group has increased (32% vs. 24%). Among parents of 5-15s both awareness (65% vs. 59% in 2016) and use (31% vs. 27% in 2016) have increased since last year.
- As in previous years, more than nine in ten parents of 5-15s who use home network-level (92%) or parental control software content filters (93%) consider them useful. Around three-quarters of users of each type of content filter say they block the right amount of content.

[102] In this context 'regularly' is defined as at least every few months

- One in five of the parents of 5-15s who use network-level filters (21%) say they think their child would be able to unset, bypass or over-ride them; this is more likely than in 2016 (15%).
- Half (50%) of parents of 5-15s with home broadband whose child goes online, and who do not use home network-level filters, say that this is because they trust their child to be sensible or because they use other types of supervision (48%).
- More than half of parents of 3-4s (52%) and 5-15s (57%), whose child uses a smartphone or tablet, are aware of any of the three tools we asked about for restricting app installation or use. At least a quarter of parents of 3-4s (25%) and 5-15s (29%) use any of these three tools.
- Among parents of 5-15s, use has increased compared to last year for changing the settings to prevent apps being downloaded (21% vs. 15%) and to prevent any in-app purchases (21% vs. 16%).
- A quarter of parents of 3-4s (26%) and 85% of parents of 5-15s who go online have ever talked to their child about how to stay safe online; this likelihood increases with age. Two in three parents of 5-15s (65%) say they talk to their child at least every few months.
- Rules about what the child does online are more likely among parents of 5-7s (88%) and 8-11s (89%) than among parents of 3-4s (75%) or 12-15s (80%).
- Nearly all parents of online 3-4s (98%) and 85% of parents of 5-15s supervise their child when online in any of the four ways we asked about. The likelihood of their using any of these means of online supervision decreases with the age of the child for 5-15s.
- While close to two in five parents of 5-15s (38%) whose child has a profile on Facebook or Facebook Messenger are aware that 13 is the minimum age requirement for setting up a profile on this site/app, awareness of the minimum age is lower among parents whose child uses Instagram (21%), Snapchat (15%) or WhatsApp (7%).
- Among parents whose child has a mobile phone, 41% of parents of 8-11s and 30% of parents of 12-15s say their child's phone has a bar on adult content in place. Rules about mobile phone use are more likely for 8-11s (83%) than for 12-15s (68%).
- Rules about gaming are more likely to be in place for 5-7s (85%) and 8-11s (86%) than for 12-15s (68%) or 3-4s (73%). Around a third (36%) of parents of 5-15s who play games on a games console connected to a television or on a handheld gaming device have controls in place. This is more likely for 5-7s (45%) and 8-11s (41%) than for 12-15s (27%).
- Three in five parents of 3-4s (57%) and 5-15s (60%) say that mandatory PINs are in use on the TV service(s) they use at home. Around one in ten parents of 3-4s and one in eight parents of 5-15s are unsure. Parents of 5-15s whose main TV service is satellite or cable are more likely than those with Freeview to say that mandatory PINs are in use. One in five parents of 3-4s (20%) and more parents of 5-15s (28%) say their child's TV viewing has ever been blocked by a mandatory PIN.

- A majority of parents of 3-4s (57%) and 5-15s (61%) say it is possible to set up voluntary PINs on the TV service(s) used at home. One-third of parents of 3-4s (34%) and close to four in ten parents of 5-15s (38%) use voluntary PINs. Use of voluntary PINs is less likely among parents of 5-15s who say their main TV service is Freeview than among those who say their main TV service is satellite or cable.
- Around one in ten parents of 3-4s (10%) and 5-7s (12%) who use mandatory or voluntary PINs on their TV service say their child knows the PIN, rising to 17% of parents of 8-11s and more than one in three parents of 12-15s (35%).
- More than one in five parents of 3-4s (21%) and 5-15s (23%) say they have removed the adult channels from the on-screen menu of channels on their TV service(s), while around two in five parents are unsure whether this is possible.
- Four in five parents of 5-15s are aware of content ratings or guidance labels in use on UK broadcasters' catch-up services (81%), and half (50%) have set up a PIN or password to prevent their child downloading unsuitable programmes or films on broadcasters' websites. Both these measures are unchanged since 2016.

Differences by gender

- Parents of girls aged 5-7 are more likely than parents of boys to say they supervise their child's use of the internet by sitting beside them and watching/ helping them (58% vs. 45%). Parents of girls aged 12-15 are more likely to say they are nearby, and regularly check what their child is doing online (40% vs. 29%). In contrast, parents of boys aged 12-15 are more likely to say they check the browser or device history after their child has been online (45% vs. 33% for girls).
- Parents of girls aged 5-15 with a mobile phone are more likely than parents of boys to have two rules in place; whom their child is in contact with on the phone (50% vs. 41%) and how much time they spend using the phone (49% vs. 41%).
- Parents of boys aged 12-15 who go online are more likely than parents of girls to say they do not use any of the four mediation approaches (11% vs. 3%): parental supervision, rules about what the child does online, any of the six types of technical tools, and talking to their child about staying safe online at least every few months.

Differences by household socio-economic group

- Compared to the average for 5-15s who go online (40%), those in DE households are less likely to use a combination of all four mediation approaches (33%).
- Compared to the average, parents of 5-15s in DE households with broadband at home and where the child goes online are less likely to be aware of home network-level filters (51% vs. 62%) and parental control software (55% vs. 65%), and are less likely to use either of them (27% vs. 37% for home network-level filters and 25% vs. 31% for parental control software).
- Parents of 5-15s in DE households (75%) have lower awareness, and those in AB households have higher awareness (87%), of content ratings or guidance labels in use on UK broadcasters' catch-up services, compared to the average (81%). Adults in AB households are also more likely than average to have set up a PIN or password on these services (62% vs. 50%) while DEs are less likely (39%).

- Parents of 3-4s in ABC1 households with broadband at home where the child goes online are more likely than those in C2DE households to use home network-level content filters (44% vs. 33%).

An overview of online parental mediation strategies

There are a range of approaches that parents can take to manage their child's access to and use of online content and services. The use of technical tools or controls that can restrict access to online content, talking to children about how to stay safe online, rules and restrictions, and supervision, all have a role to play.

This initial section looks at the interplay of these potential mediation strategies, to better understand the extent to which parents use a range of techniques for helping their child navigate the online landscape. In addition to establishing the extent to which they use a combination of mediation strategies, we look at each strategy in turn. We have grouped these approaches into four categories:

- technical tools[103] including content filters[104], PIN/ passwords, safe search and other forms of technical mediation;
- regularly[105] talking to the child about how to stay safe online;
- rules around what the child does online;[106] and
- supervision when online.

Nearly all parents of 3-4s and 5-15s mediate their child's use of the internet in some way

Figure 141 shows the relationship between the four types of mediation that parents might use to regulate their child's use of the internet.[107]

Nearly all parents whose child goes online (99% of parents of 3-4s and 96% of parents of 5-15s) use at least one of the approaches that we asked about, and one in six parents of 3-4s (16%) and two in five parents of 12-15s (40%) use all four.

Parents of 8-11s (50%) who go online are more likely to say they use all four types of mediation than parents of 5-7s (39%) and parents of 12-15s (30%). Parents of 3-4s are the least likely (16%) to use all four types of mediation.

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[103]'Technical tools' in this instance refers to the following six types of tools or controls, which were selected as they are non-device-specific tools which might be used by parents whose children go online: content filters provided by the broadband internet service provider, content filters in the form of parental control software set up on a particular computer or device used to go online (e.g. Net Nanny, McAfee Family Protection, Open DNS etc), parental controls built into the device by the manufacturer (e.g. Windows, Apple, Xbox, PlayStation etc), PIN/password required to enter websites unless already approved, safe search enabled on search engine websites and YouTube restricted mode enabled to filter inappropriate content.

[104] Content filters include ISP home network-level filters and parental control software such as McAfee and Net Nanny.

[105] In this instance 'regularly' is defined as talking to the child at least every few months.

[106] The rules included here relate to any of the rules about what the child does online, as shown in Figure 154.

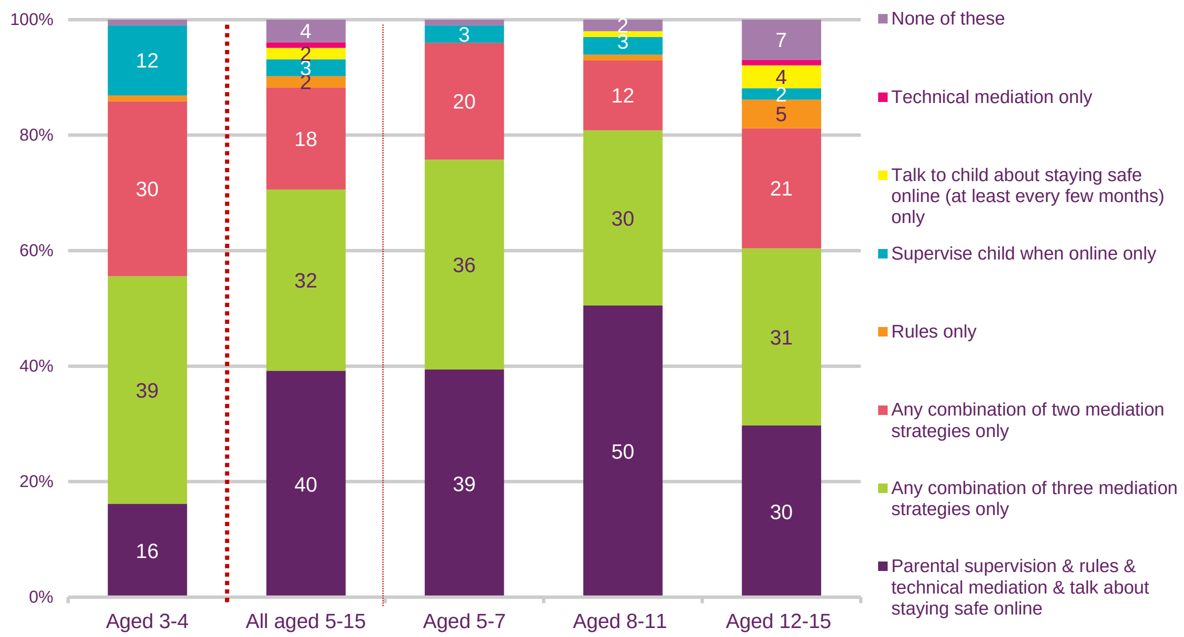
[107] Subsequent sections in this chapter of the report look at each of these forms of mediation in more detail.

Few parents of each age group use only one approach, with the exception of 3-4s, of whom 12% use only supervision. No parents of 3-4s rely *only* on talking to their child at least every few months about managing online risks or only on using technical tools, while 1% rely only on rules.

One per cent of parents of 3-4s and 4% of parents of 5-15s do not use any of the four approaches. The likelihood of not using any of these elements is more likely for parents of 12-15s (7%) than 5-7s (1%) and 8-11s (2%). Of the 4% of parents of 5-15s who do not use any of the four approaches, most of these (3%) *have* spoken to their child about staying safe online, but less frequently than every few months. Therefore, the remaining 1% of parents of 5-15s have never spoken to their child about staying safe online, and do not supervise their child online, or have technical mediation or any of the rules in place.

Due to changes that have been made to the questions used in this analysis[108] it is not possible to show a direct comparison with results in previous years. Broadly speaking, however, in 2016 the figures for not using any mediation (1% for 3-4s and 4% for 5-15s) and for using all four types of mediation (16% for 3-4s and 40% for 5-15s) were in line with those for 2017.

Figure 141: Combinations of online mediation strategies used by parents of 5-15s whose child goes online: 2017



Derived from several questions.

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15).

[108] These amends are also discussed in the relevant sections of this chapter.

Use of technical tools to manage online access and use

Parents were given descriptions of a range of technical tools and were asked whether they were aware of them, and if so, whether they used any of them.

Six of the nine technical tools asked about are applicable to most types of internet access. These six tools are:

- Content filters in the form of home network-level filtering, provided by the broadband internet service provider (e.g. BT, TalkTalk, Sky and Virgin Media), which apply to all the devices using the home broadband service.
- Content filters in the form of parental control software set up on a particular device used to go online (e.g. Net Nanny, McAfee Family Protection, Open DNS FamilyShield).
- Parental controls built into the device by the manufacturer – e.g. Windows, Apple, Xbox, PlayStation etc.
- PINs/ passwords required to enter websites, unless already approved.
- Safe search enabled on search engine websites, e.g. Google.
- YouTube restricted mode enabled to filter inappropriate content.

Two of these tools, home network-level filters provided by the ISP, and parental control software set up on a particular device used to go online, such as Net Nanny or McAfee Family Protection, are types of content filter. More detailed questions were asked of parents who used content filters, and this analysis is set out first in Figure 142 to Figure 145.

Use and awareness for the remaining four technical tools is shown for parents of 3-4s (Figure 147) and for parents of 5-15s (Figure 148).

Where awareness and use of these six tools is shown in this section, this is based on parents whose child goes online and who have a broadband internet connection at home[109].

The remaining three tools that parents were asked about relate specifically to app installation and use, and are analysed separately in Figure 149 and Figure 150.

[109]The rationale for including those households with a broadband connection (as opposed to just those where the child goes online) was twofold: first, home network-level filters work by restricting access to content across any internet-enabled devices that connect to the home broadband service. Second, it is consistent with how the data were reported on in previous years, allowing commentary on any changes over time. Overall, 46% of 3-4s and 86% of 5-15s with broadband access go online.

Use of content filters has increased since last year among parents of 5-15s

More than three in five parents of both 3-4s and 5-15s, who have home broadband and whose child goes online, are aware of home network-level content filters (66% for 3-4s and 62% for 5-15s). Levels of awareness are similar for parental control software, at 64% among parents of 3-4s and 65% for parents of 5-15s. Compared to 2016, awareness of both these types of content filter is unchanged for parents of 3-4s, while parents of 5-15s are more likely to be aware of parental control software (65% vs. 59%).

Around two in five parents of 3-4s (39%) or 5-15s (37%) use home network-level filters; use is more likely among parents of 5-15s compared to last year (31%). This is the third consecutive year in which use has increased among parents of 5-15s (not shown in Figure 142). This means that there has been a 16 percentage point increase over the last three years (37% in 2017 vs. 21% in 2014).

About one in three parents of 3-4s (32%) and 5-15s (31%) use parental control software; use has increased since 2016 for parents of 3-4s (from 24%) and parents of 5-15s (from 27%).

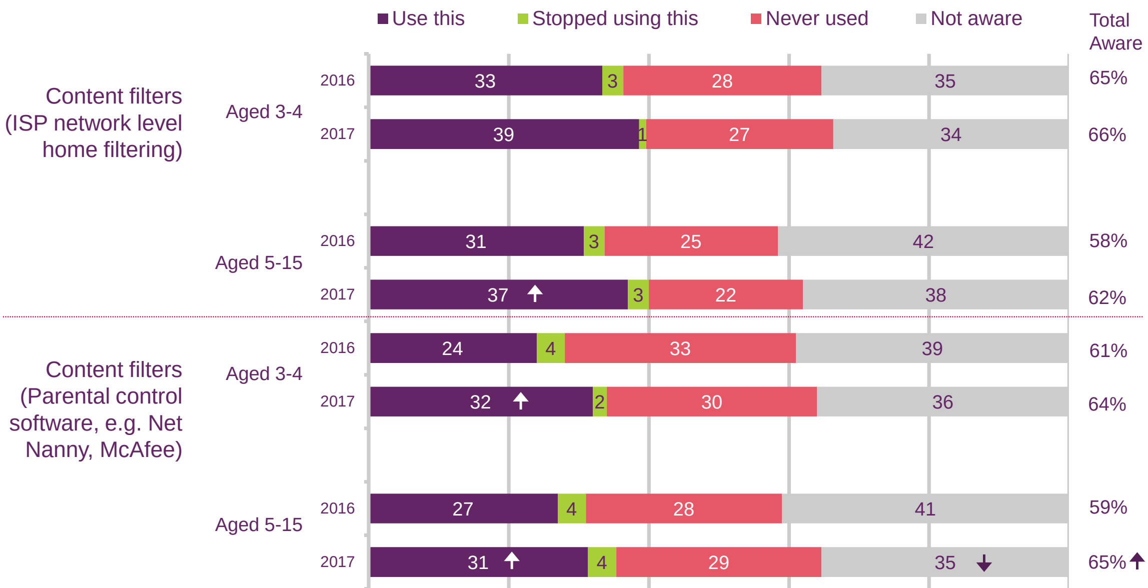
Use of home network-level filters (37%) is higher than use of parental control software filters among parents of 5-15s (31%).

For both types of content filter, parents of 3-4s and 5-15s who do not use them are more likely to say they have never used them than they have stopped using them.

Looking now at awareness and use by the age of the child, among parents of 5-15s:

- For both type of content filter, awareness does not vary by the age of the child.
- Parents of 8-11s are more likely than parents of 12-15s to use home network-level filters (41% vs. 33%) while parents of 5-7s (34%) and 8-11s (37%) are more likely than parents of 12-15s (24%) to use parental control software.
- The overall increase in use of both types of content filter among parents of 5-15s, compared to last year, is attributable to an increase among parents of 8-11s (41% vs. 34% for home network-level filters and 37% vs. 27% for parental control software).

Figure 142: Parents of 3-4s and 5-15s who have home broadband and whose child goes online, use and awareness of content filters: 2016, 2017



QP31A-B Please read each of the descriptions shown on this card. Before today were you aware of any of these types of technical tools or controls? Which ones? (prompted responses, multi coded)/ QP32A-B Do you use any of these types of technical tools or controls to manage your child's access to online content? Which ones? (prompted responses, multi coded)/ QP33A-B Have you stopped using any of these types of technical tools or controls to manage your child's access to online content? Which ones? (prompted responses, multi coded). Base: Parents with a fixed broadband connection at home where the child goes online (311 parents of 3-4s, 1174 parents of 5-15s). Significance testing shows any change between 2016 and 2017.

More than nine in ten parents of 5-15s who use parental control software consider it useful, unchanged since last year

Parents of children who have home broadband, whose child goes online and who use either of the content filters were asked whether they felt these tools were useful. The results for 5-15s[110] are shown in Figure 143.

Ninety-two per cent of parents who use home network-level content filters consider them useful, and a similar proportion (93%) say this about parental control software.

Very few parents of 5-15s who use each tool said they did not consider the tools useful (3%).

There has been no change compared to 2016 for any of these responses.

Figure 143: Parents of 5-15s who use filters, usefulness of technical tools: 2016, 2017

QP34A-B Do you find this tool useful? (unprompted responses, single coded).

Base: Parents of children aged 5-15 with a broadband internet connection at home where the child goes online who use each technical tool or control (variable base) Significance testing shows any change between 2016 and 2017.

[110] In 2017, 96% of parents of 3-4s who use ISP network-level filters consider them useful. There is no trend data available for 2016 for 3-4s due to low base sizes. It is also not possible to show the data for parents of 3-4s who use parental control software in 2017, due to a low base size of 98 interviews.

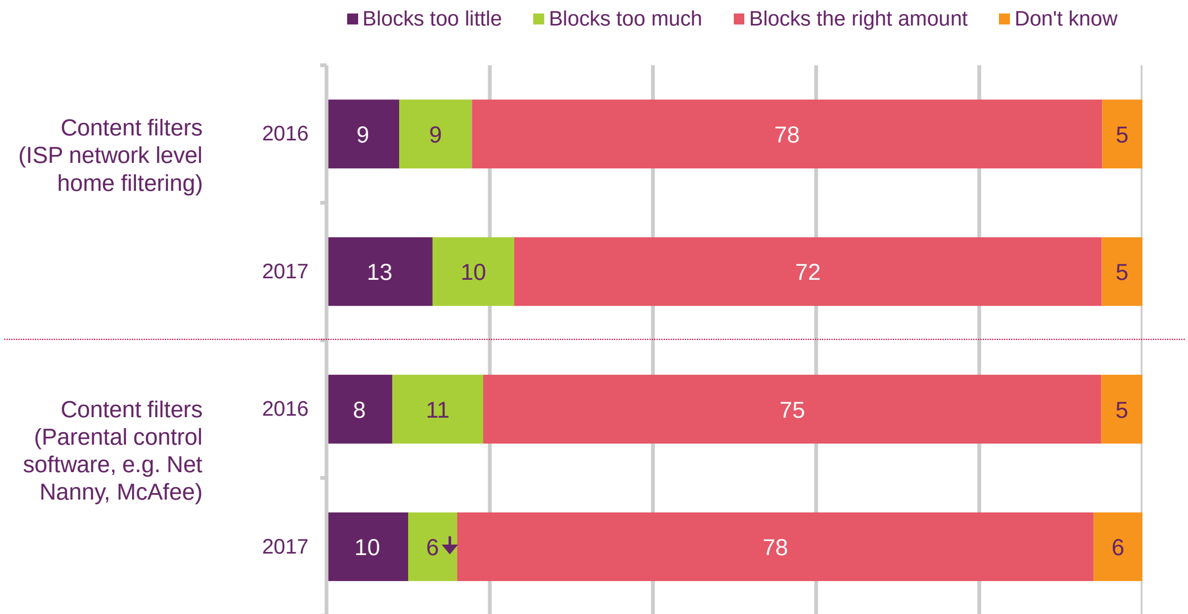
More than seven in ten parents of 5-15s who use each type of content filter say it blocks the right amount of content

Parents who use each of the content filters were asked whether they felt these tools blocked too much, too little or the right amount of content. The results are shown in Figure 144 for parents of 5-15s[111].

More than seven in ten parents who use home network-level content filters say they block the right amount of content (72%), while one in eight say they block too little (13%) and one in ten say they block too much (10%). Each of these responses is unchanged since last year.

Close to four in five parents who use parental control software say it blocks the right amount of content (78%), while one in ten say it blocks too little (10%). Six per cent say it blocks too much, lower than in 2016 (11%).

Figure 144: Parents of 5-15s who use content filters, perception of technical tools blocking too much or too little: 2016, 2017



QP35A-B Do you think they block too much content or too little content? (unprompted responses, single coded).

Base: Parents of children aged 5-15 with a broadband internet connection at home where the child goes online who use each technical tool or control (variable base). Significance testing shows any change between 2016 and 2017

[111] In 2017, 82% of parents of 3-4s who use ISP network-level filters say they block the right amount of content while 6% say they block too little or too much. There are no trend data available for 2016 for 3-4s due to low base sizes. It is also not possible to show the data for parents of 3-4s who use parental control software in 2017, due to a low base size of 98 interviews.

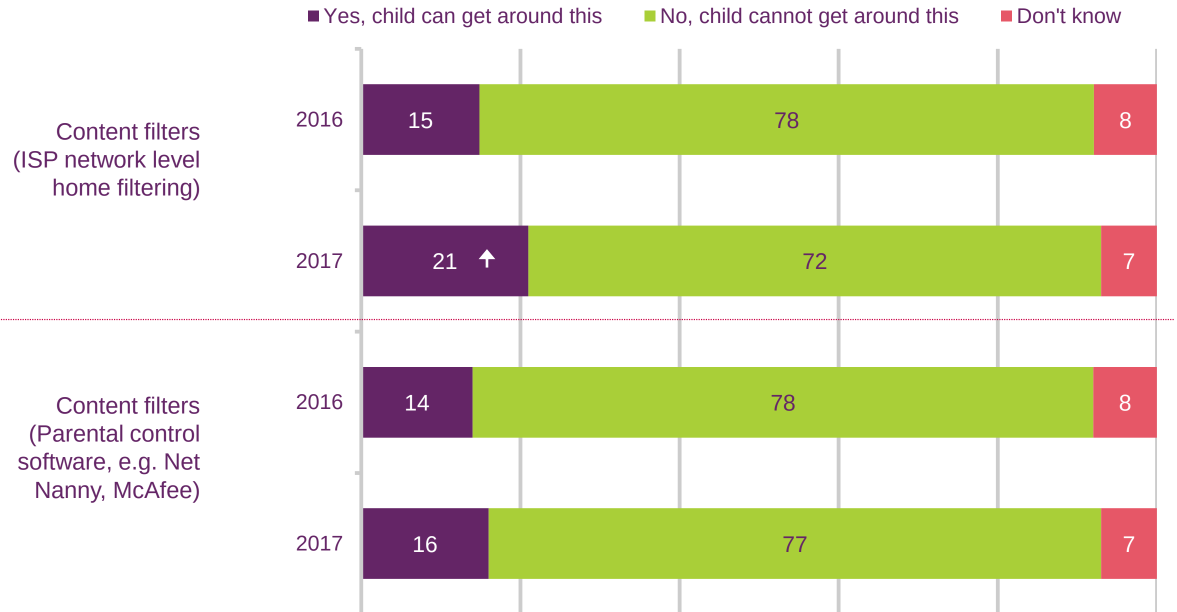
Parents of 5-15s who use home network-level filters are more likely than in 2016 to feel that their child is able to bypass them

Parents who use each of the content filters were asked whether they felt their child was able to bypass the tools. The results for 5-15s[112] are shown in Figure 145.

Around one in five parents of 5-15s who use home network-level filters (21%) and one in six using parental control software (16%) feel their child can bypass these controls. Compared to 2016, parents are more likely to say their child can bypass home network-level filters (up from 15%), although this increase follows a decrease between 2015 and 2016 (from 26% to 15%).

Parents of 12-15s are more likely than parents of 8-11s to say their child can bypass both types of content filter (30% for 12-15s vs. 17% for 8-11s for home network-level filters, and 26% vs. 13% for parental control software). As shown earlier (Figure 96), this compares to 18% of 12-15s (who go online and who opted to respond) who say they know how to disable online filters and 6% who have done this.

Figure 145: Parents of 5-15s who use content filters, perception of child's ability to bypass technical tools: 2016, 2017



QP36A-B Do you think your child can get around them? (unprompted responses, single coded).

Base: Parents of children aged 5-15 with a broadband internet connection at home where the child goes online who use each technical tool or control (variable base). Significance testing shows any change between 2016 and 2017.

[112] In 2017, 12% of parents of 3-4s who use ISP network-level filters say they think their child can bypass this control. There are no trend data available for 2016 for 3-4s due to low base sizes. It is also not possible to show the data for parents of 3-4s who use parental control software in 2017, due to a low base size of 98 interviews.

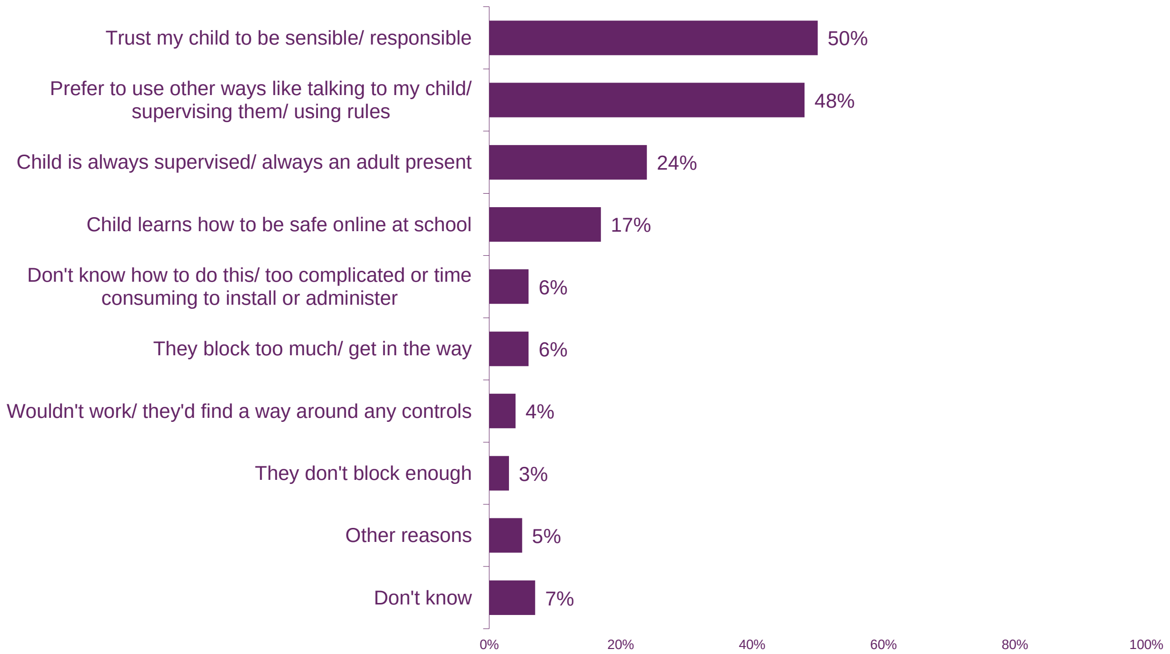
Reasons for not using content filters

Parents without home network-level filters in place say they either trust their child to be sensible or are using other mediation strategies

Parents with broadband and whose child goes online, who are aware of but do not use home network-level filters, were prompted with various reasons why they might not use them, and were asked to say whether any of these reasons applied.

Figure 146 below shows the results among parents of 5-15s.[113] Half of parents of 5-15s say they opt not to use content filters because they trust their child to be sensible/ responsible (50%), while slightly less (48%) say it is because they prefer to use other mediation strategies (like supervision/ rules/ talking to their child). A quarter say it is because their child is always supervised (24%) while one in six say their child learns how to be safe online at school (17%). All other responses are given by less than one in ten parents.

Figure 146: Parents of 5-15s with a home broadband connection whose child goes online and who are aware of but do not use home network filters – reasons for *not* using them: 2017



QP42A Here are some reasons that other people have given for not using this particular technical tool or control, do any of these apply? (prompted response, multi-coded).

Base: Parents of children aged 5-15 with a broadband internet connection at home (whose child goes online) who are aware of but do not use home network filters (297).

[113] Low base sizes prevent analysis among parents of 3-4s

Use of other technical tools to manage online access and use

Awareness of YouTube restricted mode has increased among parents of 3-4s and 5-15s

Measures of use and awareness of the remaining four technical tools, as well as those for content filters, are shown for parents of 3-4s in Figure 147 and for parents of 5-15s in Figure 148.

As in 2016, there is only one of these four tools that a majority (61%) of parents of 3-4s with home broadband and whose child goes online are aware of: PIN/ passwords required to enter websites. This is comparable with the 66% of parents who said they were aware of network-level home content filters, and the 64% aware of parental control software. Half are aware of parental controls built into the device by the manufacturer (50%) or the YouTube restricted mode (50%) while two in five parents are aware of safe searches on search engine websites (41%).

Parents of 3-4s are more likely than in 2016 to be aware of YouTube restricted mode to filter inappropriate content (50% vs. 40%)[114]. Awareness of the other three technical tools is unchanged among these parents.

Awareness among parents of 5-15s (who have home broadband and whose child goes online) is comparable to that for parents of 3-4s. A majority of parents of 5-15s are aware of PIN/ passwords required to enter websites (60%). This is lower than the two in three parents of 5-15s aware of parental control software (65%) and comparable to those aware of network-level home content filters (62%).

As with parents of 3-4s, awareness of YouTube restricted mode is higher than last year (47% vs. 39% in 2016).[115] Unlike parents of 3-4s, parents of 5-15s are less likely than in 2016 to be aware of PIN/ passwords required to enter websites (60% vs. 65% in 2016).

Parents of 5-7s (52%) and 8-11s (53%) are more likely than parents of 12-15s (37%) to be aware of YouTube restricted mode. Awareness of the other three technical tools among parents of 5-15s does not vary by the age of the child.

Parents of 5-15s are less likely than in 2016 to use PINs or passwords to prevent access to websites that have not already been approved, but more likely to use YouTube restricted mode

Two in five, or fewer, parents of 3-4s who have home broadband and whose child goes online use each of these technical tools. One in three use PIN/ passwords to enter websites unless already approved (34%), comparable to those using home network-level content filters (39%) or parental control software (32%). A quarter, or less, use YouTube restricted mode (24%), controls built into the device by the manufacturer (21%), or safe searches on search engine websites (17%). Use of all four tools is unchanged since last year.

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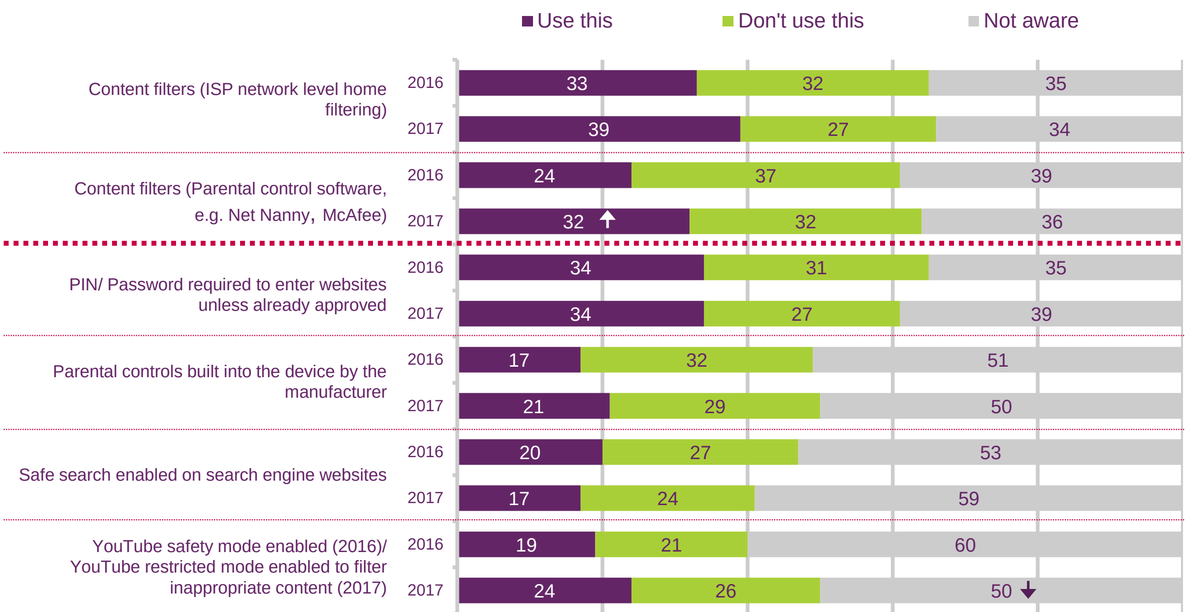
[114] In 2016 this technical tool was referred to as YouTube safety mode rather than YouTube restricted mode. Any difference in awareness/ use seen since last year could therefore be attributable to this change in definition.
[115] See footnote 114

Use of each of the four tools among parents of 5-15s is comparable to use by parents of 3-4s. Around three in ten parents of 5-15s use PIN/ passwords required to enter websites (31%), although this is lower than last year (35%). About one in five use parental controls built into the device by the manufacturer (22%), restricted mode on YouTube (22%) or safe search on search engine websites (20%). Since 2016, use of YouTube restricted mode is more likely (22% vs. 17%).[116]

Parents of 5-7s and 8-11s are more likely than parents of 12-15s to say they use three controls: PIN/ passwords required to enter websites (40% for 5-7s, 34% for 8-11s vs. 23% for 12-15s), safe searches on search engine websites (21% for 5-7s, 25% for 8-11s vs. 14% for 12-15s) and YouTube restricted mode enabled (27% for 5-7s, 28% for 8-11s vs. 13% for 12-15s).

The decline in use since 2016 of PIN/ passwords to enter websites unless already approved among 5-15s is attributable to parents of 12-15s being less likely to use this tool (23% vs. 31% in 2016). The increase in use of YouTube restricted mode is seen only among parents of 8-11s (28% vs. 19% in 2016).

Figure 147: Parents of 3-4s who have home broadband and whose child goes online - use and awareness of technical tools: 2016, 2017

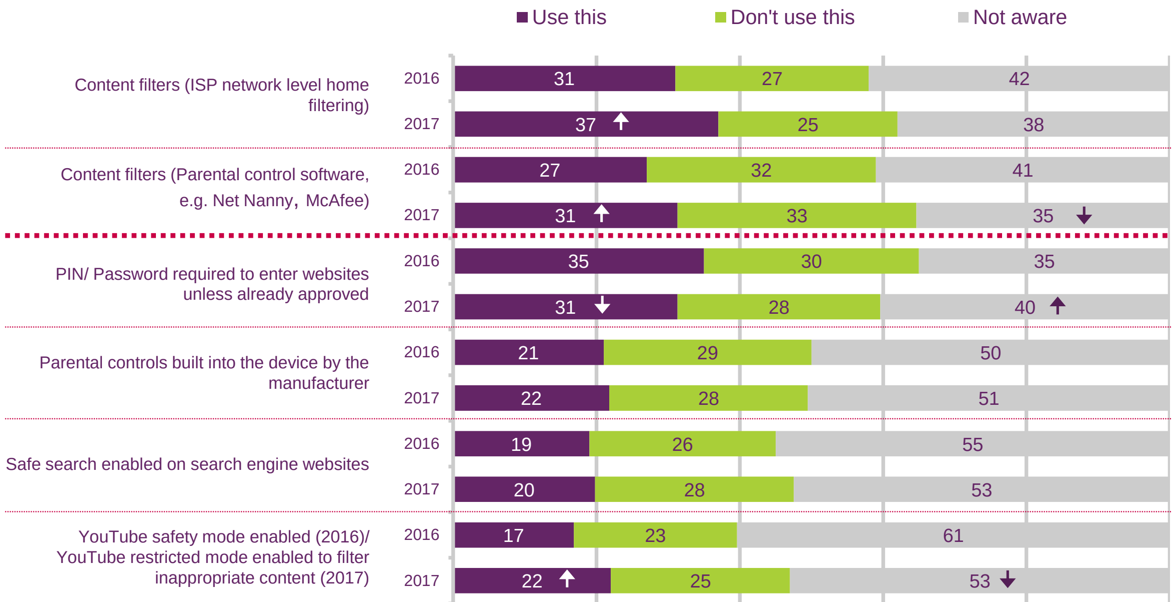


QP31A-F Please read each of the descriptions shown on this card. Before today were you aware of any of these types of technical tools or controls? Which ones? (prompted responses, multi coded)/ QP32A-F Do you use any of these types of technical tools or controls to manage your child's access to online content? Which ones? (prompted responses, multi coded).

Base: Parents of 3-4s with a fixed broadband connection available to their child at home where the child goes online (311). Significance testing shows any change between 2016 and 2017.

[116] See footnote 114

Figure 148: Parents of 5-15 who have home broadband and whose child goes online - use and awareness of technical tools: 2016, 2017



QP31A-F Please read each of the descriptions shown on this card. Before today were you aware of any of these types of technical tools or controls? Which ones? (prompted responses, multi coded)/ QP32A-F Do you use any of these types of technical tools or controls to manage your child's access to online content? Which ones? (prompted responses, multi coded).

Base: Parents of 5-15s with a fixed broadband connection available to their child at home where the child goes online (1174). Significance testing shows any change between 2016 and 2017.

Looking across all the technical tools that parents were asked about, 86% of parents of 3-4s and 87% of parents of 5-15s who have home broadband and whose child goes online are aware of one or more of these six technical tools. Parents of 3-4s (91%) are more likely than parents of 12-15s (84%) to be aware of these tools.

At least six in ten parents of 3-4s (64%) and 5-15s (61%) use any of these six tools; use is lower among parents of 12-15s (50%) compared to 5-7s (71%) and 8-11s (68%).

Parents of 5-15 are more likely than in 2016 to have changed the settings on their child's smartphone or tablet to prevent apps being downloaded and to prevent in-app purchases

In addition to asking about the technical tools discussed above, parents were asked about their awareness and use of tools for managing app installation and use, including:

- changing the settings on a phone or tablet to stop apps being downloaded;
- changing the settings on a phone or tablet to prevent in-app purchases; and
- parental control software or apps that can be used to restrict access to content or manage use of the device[117].

Figure 149 shows awareness and use of each of these three tools among parents of 3-4s whose child uses a smartphone or a tablet computer, while Figure 150 shows this among parents of 5-15s.

More than half of parents of 3-4s (52%) and 5-15s (57%) whose child uses a smartphone or tablet are aware of any of these three tools, and at least a quarter of parents of 3-4s (25%) and 5-15s (29%) use any of them.

Around four in ten parents of 3-4s or 5-15s whose child uses a smartphone or tablet are aware of each of these tools.

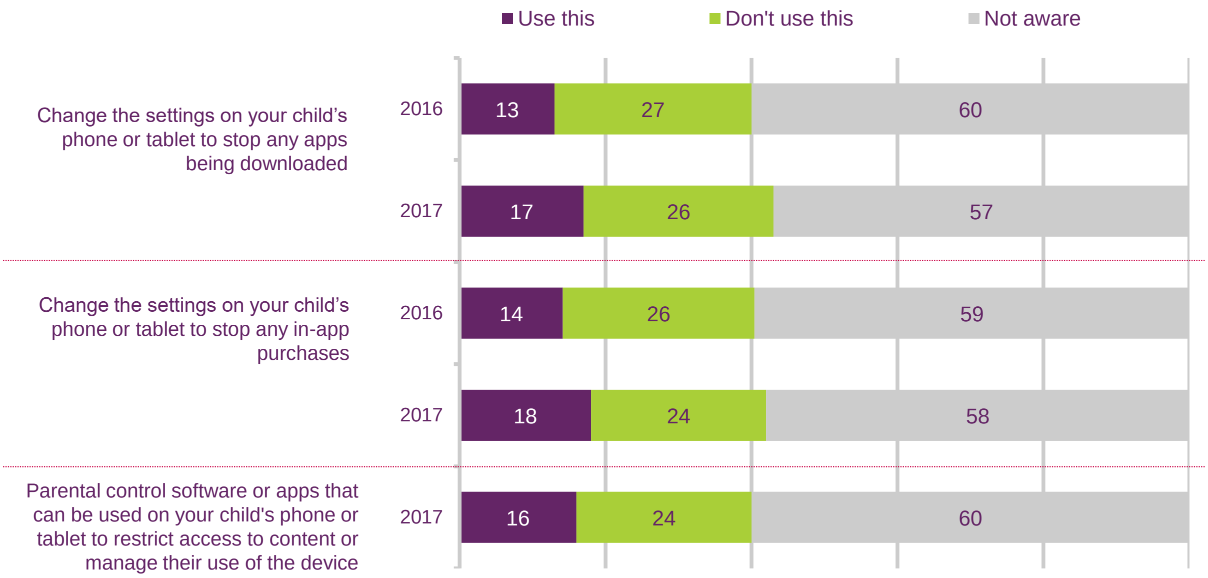
Awareness has increased since 2016 among parents of 5-15s of changing settings to prevent in-app purchases (44% vs. 39%); this increase is attributable to parents of 8-11s (48% vs. 40% in 2016). Awareness is unchanged for each tool among parents of 3-4s.

Use of each of these tools is consistent among parents of 3-4s and 5-15s; between 16% and 21% of parents say they use each of them. Parents of 5-7s and 8-11s whose child uses a smartphone or tablet are more likely than parents of 12-15s to have changed the settings to prevent apps being downloaded or to prevent in-app purchases.

Use is unchanged compared to last year among parents of 3-4s for those controls, where it is possible to show a trend. Parents of 5-15s are more likely to have changed the settings to prevent apps being downloaded (21% vs. 15%) and to prevent in-app purchases (21% vs. 16%). These increases in use are attributable to parents of 8-11s.

[117] This particular technical tool was included for the first time in 2017 so no trend data are available

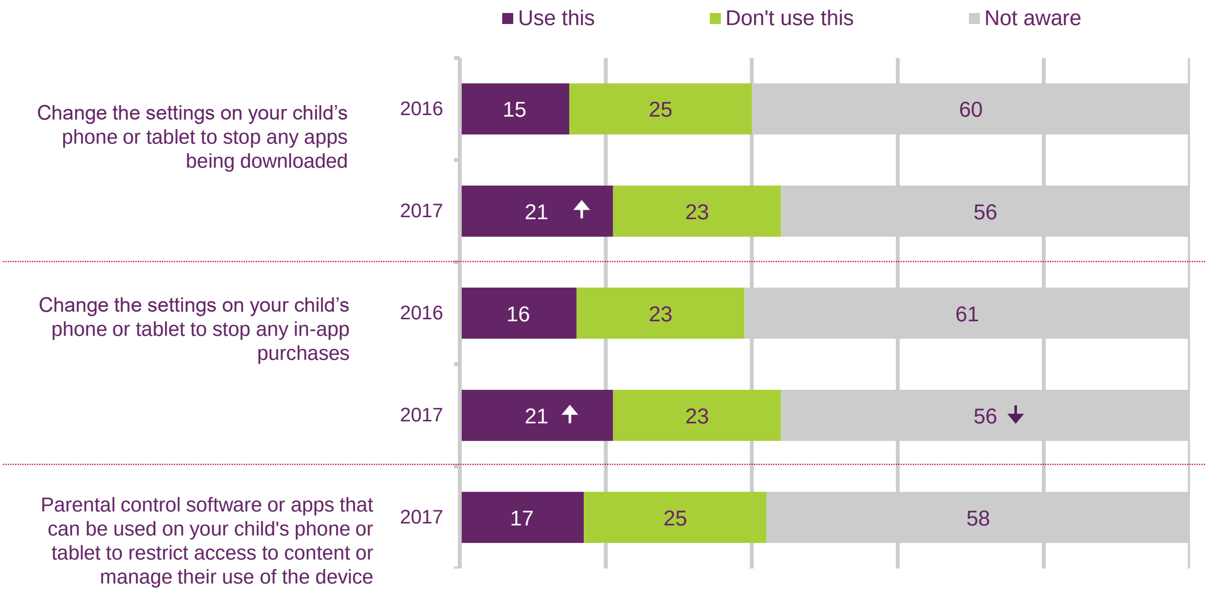
Figure 149: Parents of 3-4s whose child uses a smartphone or tablet computer - use and awareness of technical tools/ controls for these devices: 2016, 2017



QP31G-I Please read each of the descriptions shown on this card. Before today were you aware of any of these types of technical tools or controls? Which ones? (prompted responses, multi coded)/ QP32G-I Do you use any of these types of technical tools or controls to manage your child's access to online content? Which ones? (prompted responses, multi coded).

Base: Parents of 3-4 whose child uses a smartphone or tablet computer (435). Significance testing shows any change between 2016 and 2017.

Figure 150: Parents of 5-15s whose child uses a smartphone or tablet computer - use and awareness of technical tools/ controls for these devices: 2016, 2017



QP31G-I Please read each of the descriptions shown on this card. Before today were you aware of any of these types of technical tools or controls? Which ones? (prompted responses, multi coded)/ QP32G-I Do you use any of these types of technical tools or controls to manage your child's access to online content? Which ones? (prompted responses, multi coded).

Base: Parents of 5-15s whose child uses a smartphone or tablet computer (1205). Significance testing shows any change between 2016 and 2017.

Talking to children about staying safe online

More than four in five parents of 5-15s who go online say they have spoken to their child about how to stay safe online

Parents of 3-4s and 5-15s whose child goes online were asked whether they had ever talked to their child about how to stay safe online[118]. The results are shown in Figure 151.

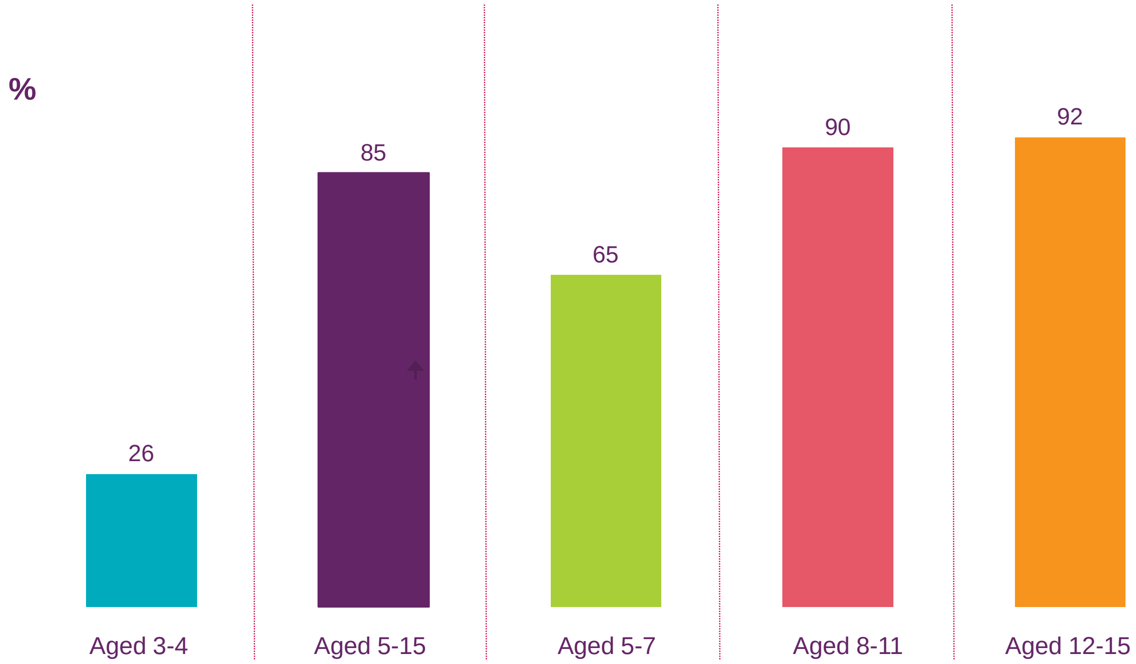
Overall, more than eight in ten parents of 5-15s (85%) have ever talked to their child about staying safe online. While two-thirds of parents of 5-7s (65%) have done this, it is more likely for parents of 8-11s (90%) and parents of 12-15s (92%). A quarter of parents of 3-4s whose child goes online have ever talked to their child about staying safe online (26%).

It is not possible to show the trend compared to last year due to changes made to this question. In 2016, parents of 3-4s and 5-15s whose child goes online were instead prompted with 12 possible online risks and asked whether they had ever talked to their child about each of them. About a

[118] If necessary, parents were provided with the following definition: For example, "have you ever discussed with them the potential dangers of things like content on sites or apps that might be unsuitable for their age, sharing too much information online, contact with people they don't know personally etc".

quarter of parents of 3-4s (27%) and more than four in five parents of 5-15s (84%) had ever talked to their child about managing at least one of these online risks.

Figure 151: Parents talking to their child about staying safe online: 2017



QP28 – Have you ever talked to your child about how to stay safe online? IF NECESSARY: For example, have you ever discussed with them the potential dangers of things like content on sites or apps that might be unsuitable for their age, sharing too much information online, contact with people they don't know personally etc.

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15).

Two in five parents of 5-15s say they talk to their child at least every few weeks about how to stay safe online

Parents who said they had ever spoken to their child about how to stay safe online were then asked how often they talked to their child about this[119].

The results are shown in Figure 152, expressed as a proportion of those whose child goes online at home or elsewhere.

One in seven parents of 3-4s (15%) talk to their child at least every few weeks, and a further 7% of parents of 3-4s say they do this at least every few months.

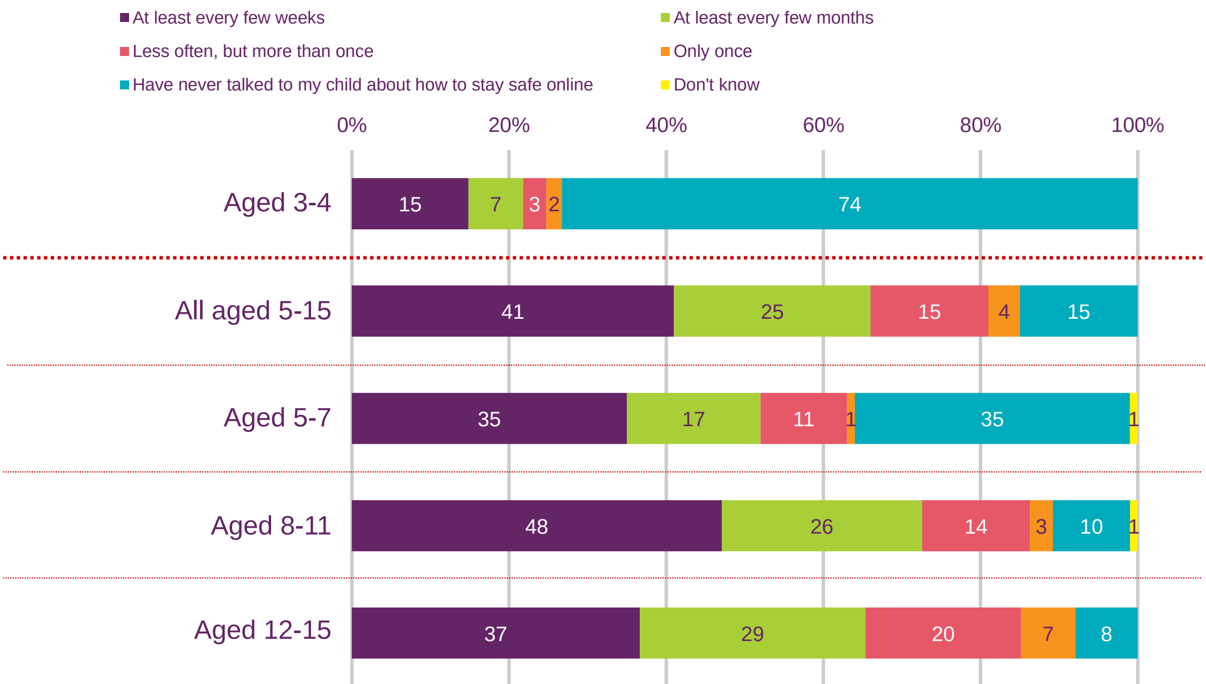
Four in ten parents of 5-15s who go online (41%) say they talk to their child about staying safe online at least every few weeks. This is more likely for 8-11s (48%) than for 5-7s (35%) or 12-15s (37%). A further quarter of parents of 5-15s (25%) who go online say that although they don't speak to their child every few weeks, they do speak to them every few months. Therefore, a majority of parents of

[119] This question was used in the analysis relating to 'Talking to child about how to stay safe online at least every few months' for the combinations of online mediation strategies used by parents, as shown in Figure 141, but more detail is provided in this section of the report.

5-15s (65%) speak to their child at least every few months. This incidence is higher among parents of 8-11s (73%) and 12-15s (66%) and lower among parents of 5-7s (53%) or 3-4s (21%).

Parents of 12-15s who go online are most likely to say they have only ever spoken to their child once about how to stay safe online (7% vs. 3% for 8-11s, 1% for 5-7s and 2% for 3-4s).

Figure 152: Frequency of talking to children about how to stay safe online, by age: 2017



QP29 – Which of these best describes how often you talk to your child about how to stay safe online? (prompted responses, single coded).

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15).

More than three-quarters of parents of 5-15s have looked for or received information or advice about how to help their child manage online risks – an increase since last year

Parents of children who go online were asked whether they had ever looked for, or received, information or advice about how to help their child manage online risks. Parents were prompted with nine possible sources, with the option of nominating other sources. Figure 153 shows the responses given by parents of 3-4s and 5-15s, broken out by age.

More than three-quarters of parents of children aged 5-15 (78%) have looked for or received information or advice from any source, and this is more likely for parents of 8-11s (81%) or 12-15s (81%) than for parents of 5-7s (70%). More than half of parents of 3-4s (56%) say they have *ever* done this.

The most commonly-used source for parents of 5-7s, 8-11s and 12-15s is the child's school (61% for parents of 5-15s), followed by friends and family (34%). Fifteen per cent of parents of 5-15s have looked for or received information from the media, while a similar proportion have used internet service providers (14%), other websites with information about how to stay safe online (13%) and the child themselves (13%). All other information sources were mentioned by one in ten parents of 5-15s, or less.

Compared to last year, parents of 3-4s are more likely to say they have looked for information or advice (56% vs. 45%) and are more likely to have used once source in particular: family or friends (28% vs. 20%).

Parents of 8-11s are also more likely than they were last year to say they have looked for any information or advice (81% vs. 75%) and to have used three sources in particular: the child's school (63% vs. 56%), the media (16% vs. 9%) and other websites with safety information (15% vs. 10%). While parents of 12-15s are more likely to say have looked for information or advice (81% vs. 73% in 2016), this is not attributable to increased use of any individual source.

Figure 153: Parents of 5-15s stating they have looked for or received any information or advice about how to help their child to manage online risks: 2017

All who go online	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Base	354	1247	317	458	472
From child's school	24%	61% ↑	53%	63% ↑	63%
From family or friends	28% ↑	34%	30%	34%	37%
From TV, radio, newspapers or magazines	8%	15% ↑	12%	16% ↑	16%
From Internet service providers (ISPs)	11%	14%	11%	16%	15%
From other websites with information about how to stay safe online	7%	13% ↑	9%	15% ↑	13%
From your child themselves	3%	13%	6%	13%	16%
From Government or local authority	7%	9%	7%	7%	12%
From manufacturers or retailers selling the product	7%	8%	7%	9%	7%
From the BBC	6%	7%	7%	6%	8%
From other sources	3%	3%	3%	3%	3%
TOTAL – ANY INFORMATION LOOKED FOR/ RECEIVED	56% ↑	78% ↑	70%	81% ↑	81% ↑

QP52 – Have you looked for or received information or advice about how to help your child manage online risks from any of these sources or in any other way? (prompted responses, multi-coded).

Base: Parents of children who go online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017

Rules about the internet

More than four in five parents of 5-15s who go online have rules in place about their child's online activities

To provide a more granular insight into parents' mediation of online services and content, we asked parents of 3-4s and 5-15s who go online about rules they might have in place to mediate their child's online activities and behaviour. Parents were prompted with six types of rules, with the option of nominating other rules, and were asked which, if any, they had in place. Figure 154 shows results among parents of 3-4s, 5-7s, 8-11s and 12-15s[120].

Three-quarters of parents of 3-4s who go online (75%), and more than four in five parents of 5-15s, have any of these rules in place (85%). Rules are more likely for 5-7s (88%) and 8-11s (89%) than for 3-4s (75%) and 12-15s (80%).

There is only one rule in place among a majority of parents of 3-4s and 5-15s: rules about the types of websites or apps they can use (66% of parents of 3-4s and 59% of 5-15s). The next most frequently applied rules among parents of 3-4s who go online are the rules about how much time they spend online (41%), and when they can go online (38%). More than a quarter of parents of 3-4s have rules in place about whom the child can contact online (29%), about spending money online (28%) or about the information they can share online (27%).

Among parents of 5-15s who go online the next most frequently-applied rule relates to whom they can contact online (58%). Around half have rules about the information they can share online (51%) or how much time they can spend online (49%), or about spending money online (49%). Two in five (39%) have rules about when they can go online.

The use of particular rules varies by age among 5-15s; parents of 12-15s are less likely than parents of younger children (5-7s and 8-11s) to have rules about the types of websites or apps they can use, how much time they spend online and when they can go online.

[120] Due to changes in the way that this question was asked in 2017 it is not possible to show a trend for this measure

Figure 154: Rules about what child does online, by age: 2017

All whose child goes online		Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Rules about…….	Base	354	1247	317	458	472
The types of websites or apps they can use		59%	66%	73%	73%	54%
Who they can contact online		29%	58%	45%	63%	60%
The information they can share online		27%	51%	39%	58%	50%
How much time they spend online		41%	49%	55%	52%	43%
Spending money online		28%	49%	41%	52%	50%
When they can go online		38%	39%	44%	44%	32%
Spontaneous response: Only going online when supervised		4%	1%	2%	0%	0%
TOTAL - ANY RULES ABOUT WHAT CHILD DOES ONLINE		75%	85%	88%	89%	80%

QP26 - Do you have any of these rules about what your child does online? (prompted responses, multi-coded)

Base: Parents whose child goes online (354 aged 3-4, 1247 aged 5-15, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15).

Significance testing shows any change between 2016 and 2017.

Parental supervision of mobile or tablet use at home

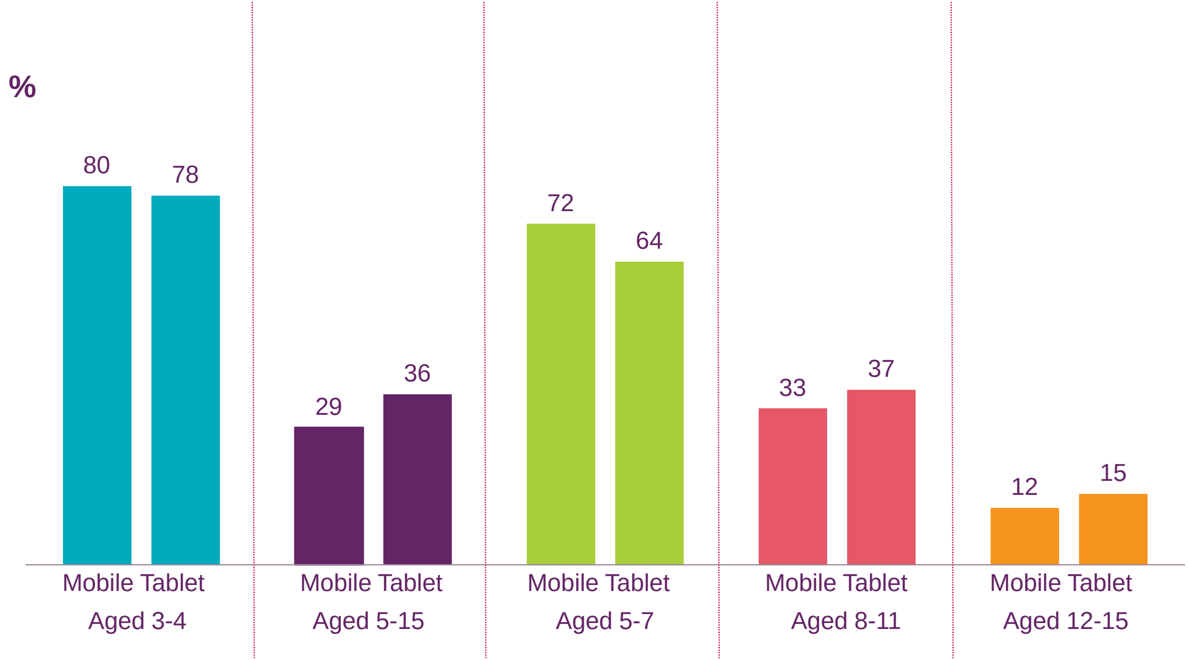
Younger children are more likely than older children to be allowed to use a mobile or tablet at home only where a parent can see them

In 2017, parents whose child uses a mobile phone and those whose child uses a tablet were asked where in the home their child was allowed to use these devices. Parents could either say their child could use the device only in a communal area/ where a parent could see them, or that they could use the phone anywhere at home. The proportions of parents giving the former response are shown in Figure 155.

The likelihood of the child being able to use a mobile phone or tablet only at home where the parent can see them decreases with the age of the child.

Four in five children aged 3-4 who use a mobile phone (80%) or tablet (78%) are only allowed to use these devices at home in communal areas; at least three in five parents of 5-7s say this about their child's mobile (72%) or tablet use (64%). This compares to about a third of parents of 8-11s saying this about their child's mobile (33%) or tablet use (37%) while around one in seven parents of 12-15s impose this rule at home for their child's mobile (12%) or tablet use (15%).

Figure 155: Parents stating their child can use a mobile phone or tablet only at home in communal areas/ where a parent can see them, by age: 2017



QP30A – You said earlier your child uses a mobile phone. When your child uses the phone at home, which one of these statements best applies as to where they can use it?/ QP30B - You said earlier that your child uses a tablet. When they use the tablet at home, which one of these statements best applies as to where they can use it?

Base: Parents whose child uses a mobile phone (196 aged 3-4, 908 aged 5-15, 171 aged 5-7, 293 aged 8-11, 444 aged 12-15)/ Parents whose child uses a tablet (434 aged 3-4, 1085 aged 5-15, 307 aged 5-7, 403 aged 8-11, 375 aged 12-15.

Parental supervision of internet use

More than four in five parents of 5-15s say they supervise their child in some way when they go online

Parents of children aged 3-4 and 5-15 who go online were prompted with four possible responses to questions about ways in which they supervise their child online, and were asked whether they usually supervised their child in any of these ways when the child went online using any type of device[121].

Figure 156 shows the responses from parents of 5-15s, and Figure 157 shows the responses from parents of 3-4s, 5-7s, 8-11s and 12-15s.

Almost all parents of 3-4s (98%) and more than four in five parents of 5-15s (85%) say they supervise their child's online access and use in any of the four ways we asked about.

[121] This question was used in the analysis relating to parental supervision for the combinations of online mediation strategies used by parents, as shown in Figure 141, but more detail about online supervision is provided in this section of the report.

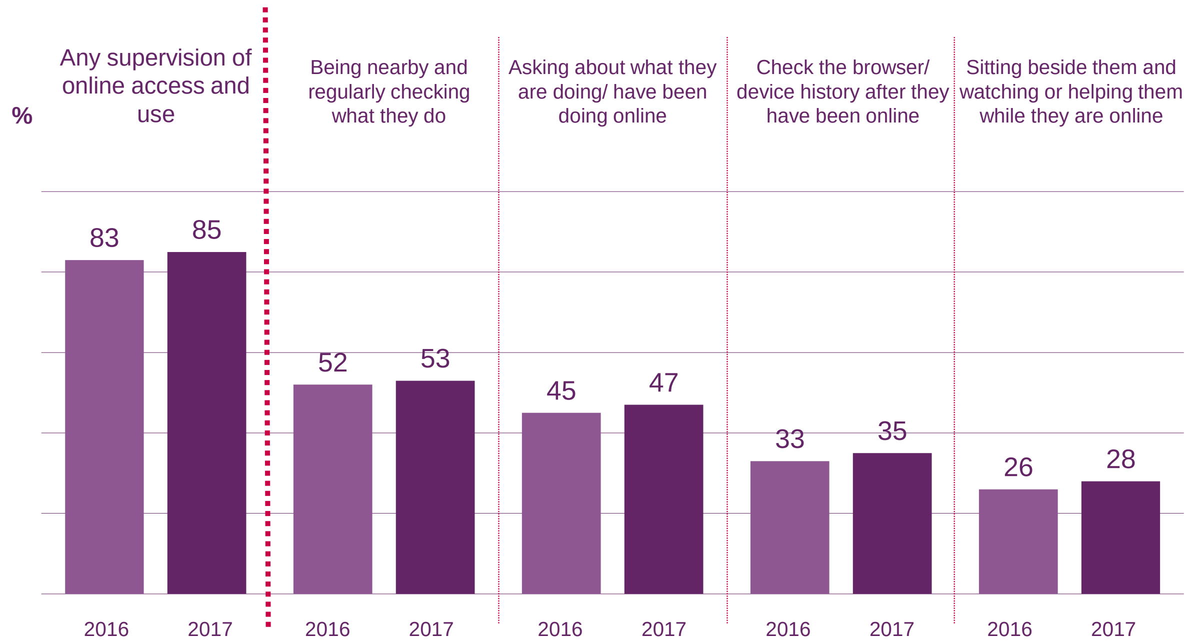
Among parents of 5-15s, half (53%) say they are usually nearby when their child goes online and regularly check what they are doing, with just under half (47%) saying they usually ask them about what they are doing/ have been doing online. Around one in three (35%) parents say they check the browser/ device history after the child has been online, and close to three in ten (28%) usually sit beside their child and watch or help them when online.

The likelihood of using any of these means of online supervision is similar for parents of 3-4s and 5-7s (98% for both), and then decreases with the age of the child (93% for 8-11s, 71% for 12-15s). Supervising the child by sitting beside them and watching/ helping them is the most likely way of supervising a child aged 3-4 (73%) but the least likely for parents of 12-15s (12%). A majority of parents of 3-4s (60%), 5-7s (71%) and 8-11s (63%) say they supervise their child by being nearby and regularly checking what they do. One in three parents of 12-15s also adopt this approach (34%).

Parents of 8-11s (55%) and 12-15s (46%) are more likely than parents of 3-4s (25%) and 5-7s (37%) to rely on asking their child what they have been doing online. Parents of 8-11s and 12-15s are also more likely than parents of 3-4s and 5-7s to say they check the browser/ device history after their child has been online (38% for 8-11s, 39% for 12-15s vs. 16% for 3-4s and 22% for 5-7s).

The only change since 2016 is that parents of 12-15s are more likely to check the browser or device history after the child has been online (39% vs. 32%).

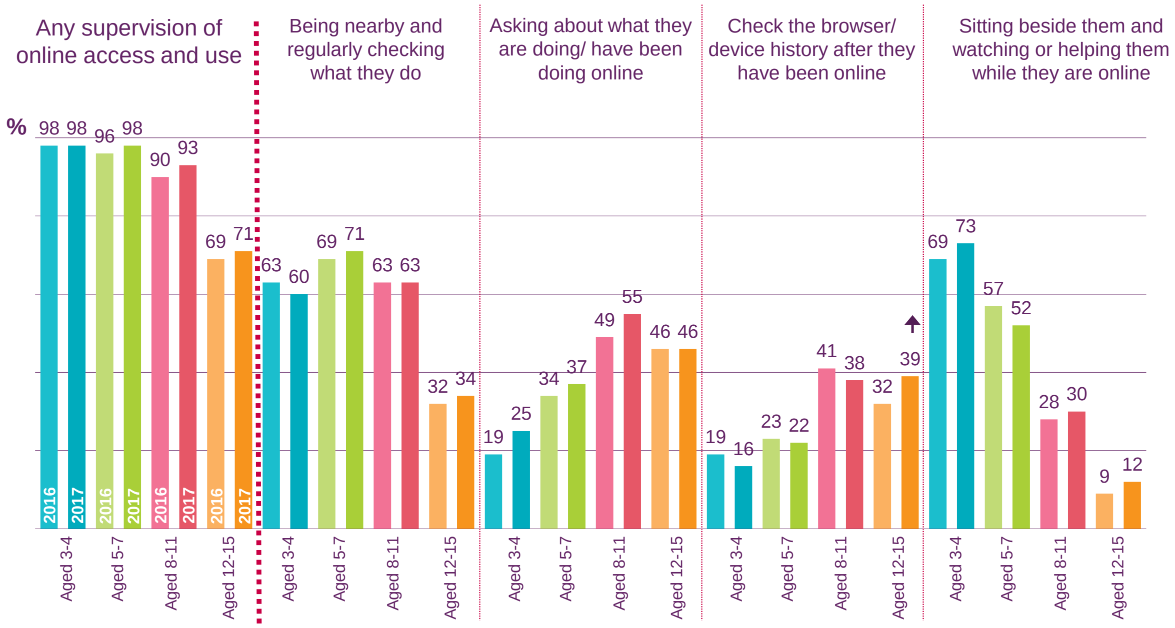
Figure 156: Types of parental supervision when child goes online, among parents of 5-15s: 2016, 2017



QP27 – When your child goes online on any devices, would you usually supervise them, in any of these ways? (prompted responses, multi-coded).

Base: Parents whose child goes online at home or elsewhere (1247 aged 5-15). Significance testing shows any change between 2016 and 2017.

Figure 157: Types of parental supervision when child goes online, by age: 2016, 2017



QP27 – When your child goes online on any device, would you usually supervise them, in any of these ways? (prompted responses, multi-coded).

Base: Parents whose child goes online (354 aged 3-4, 317 aged 5-7, 458 aged 8-11, 472 aged 12-15). Significance testing shows any change between 2016 and 2017.

Awareness of and attitudes towards minimum age requirements on social media sites/ messaging apps

Parental awareness of the minimum age requirements on social media or messaging sites is low

In 2017, parents of 5-15s whose child has a profile or account on four specific social media or messaging sites or apps (Facebook or Facebook Messenger, Instagram, Snapchat or WhatsApp) were asked the following question about each site: "As far as you are aware, is there a minimum age that someone has to reach before they can be on Facebook or Facebook Messenger/ Instagram, Snapchat/ WhatsApp?". If they said there was a minimum age requirement, they were asked what age that was. Parents were not prompted with possible responses, and the results are shown in Figure 158. For each of the sites/ apps that parents were asked about, the minimum age requirement is 13 years old.

Around three in four parents whose child either uses Facebook or Facebook Messenger (78%) are aware of a minimum age requirement for these sites/apps and around half of these parents give the correct response of 13 years old (38%), while a similar proportion (39%) mention an incorrect minimum age.

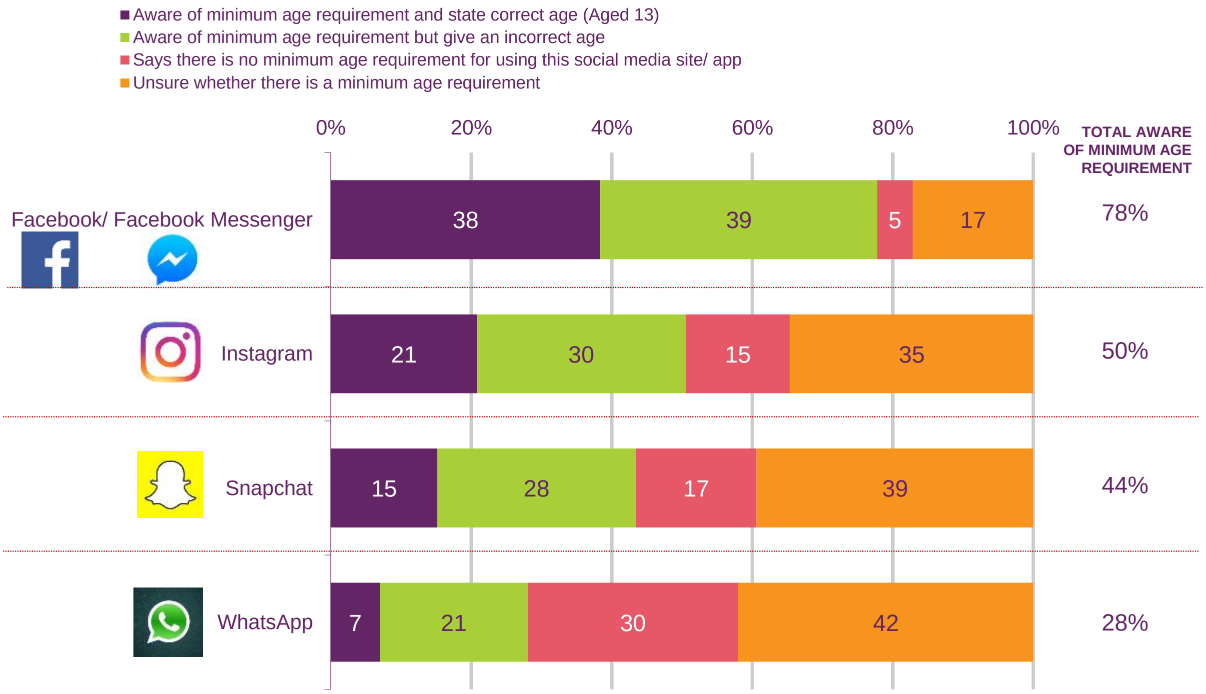
While half of parents of 5-15s whose child uses Instagram (50%) are aware of a minimum age requirement on this site/ app, two in five of these (21%) give the correct response and three in five of these an incorrect response (30%).

Less than half of parents whose child uses Snapchat (44%) say there is a minimum age requirement on this site. Only a third of these (15%) give the correct response while two-thirds give an incorrect response (28%).

Three in ten parents whose child uses WhatsApp are aware of a minimum age requirement on this site/ app (28%). A quarter of these parents (7%) give the correct response, and three-quarters (21%) an incorrect response.

Across each of the four sites parents were asked about, where a parent is unaware about minimum age requirements they are more likely to be unsure, rather than stating that there is no minimum age requirement. However, while 5% of parents whose child uses Facebook or Facebook Messenger say there is no minimum age requirement, this increases to 30% among parents whose child uses WhatsApp.

Figure 158: Parental awareness of minimum age requirement for particular social media sites/ apps used by their child aged 5-15: 2017



QP46A/B/C/D – You said your child is on .... As far as you are aware is there a minimum age that someone has to reach before they can be on ...... IF YES: What age is that? (unprompted responses, single coded).

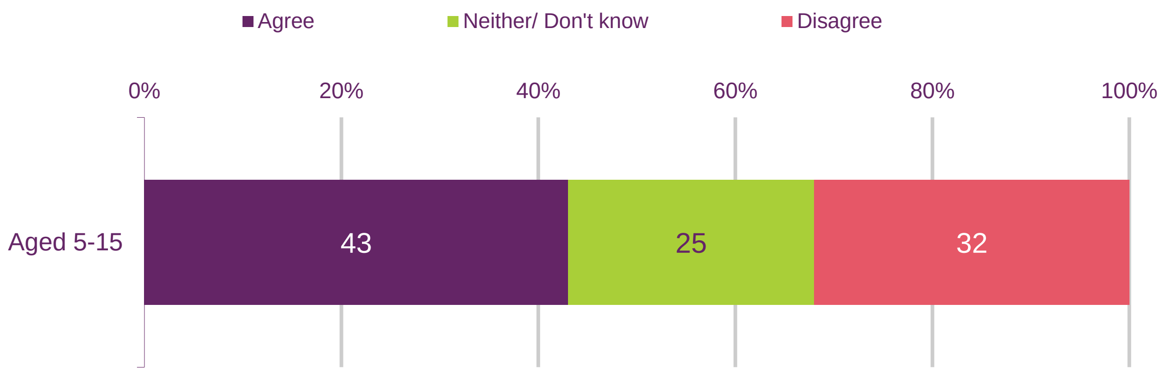
Base: Parents of 5-15s whose child has a social media profile/ account on Facebook/ Facebook Messenger (279)/ Instagram (215)/ Snapchat (213), WhatsApp (129).

Two in five parents whose child uses social media or messaging services say they would allow their child to use them before reaching the required minimum age

Parents of 5-15s whose child has a social media profile were asked the extent to which they agreed or disagreed with the following statement about their child's use of social media or messaging sites or apps: "I would allow my child to use these sites before they had reached the minimum age required by that site or app"

Two in five parents agree (43%) with this statement, while a third of parents disagree (32%). A quarter (25%) are either unsure or give a neutral response.

Figure 159: Parental agreement with "I would allow my child to use these sites before they had reached the minimum age required by that site or app", among parents of 5-15s whose child has a social media account/ profile: 2017



QP47 – Please tell me the extent to which you agree or disagree with this statement about your child's use of social media or messaging sites or apps - I would allow my child to use these sites before they had reached the minimum age required by that site or app (prompted responses, single coded).

Base: Parents whose child has a social media account/ profile (422 aged 5-15).

Parental controls for mobile phones

A fifth of parents whose child has a mobile phone are unsure whether the bar on adult content is in place

Parents of 3-4s and 5-15s with their own mobile phone were prompted with the following information: "The UK mobile phone networks - O2, Vodafone, EE and so on - each have a block on adult or 18+ content which requires users to go through an age verification process before this content can be unblocked and received on the user's phone". These parents were then asked whether they had been aware of this bar on adult content before they were told about it.

The results are shown in Figure 160 for parents of 5-15s, 8-11s and 12-15s.[122] More than half of parents of 5-15s say they are aware of this bar on adult content (55%) with fewer saying they are not aware (41%). These results do not vary by the age of the child (among 8-11s and 12-15s) and are unchanged since 2016.

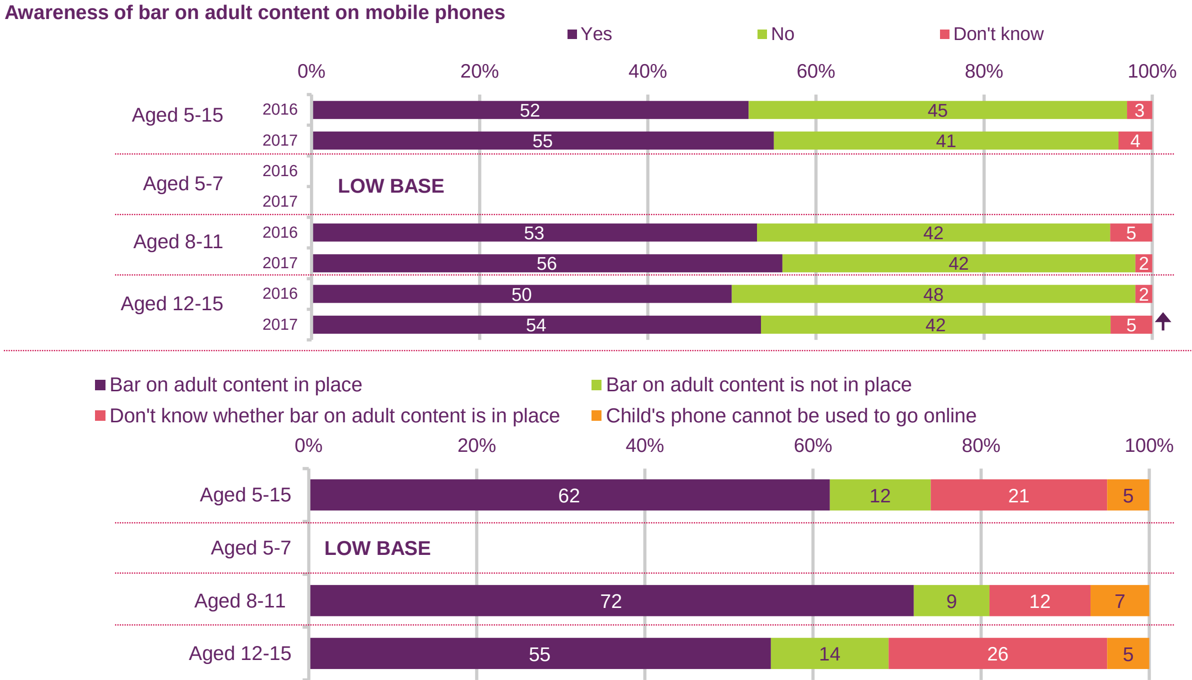
Parents aware of the bar on adult content were asked whether it was set up on their child's phone. More than three in five parents of 5-15s whose child has their own mobile phone, and who are aware of the bar, said it was set up (62%); this was more likely for 8-11s (72%) than for 12-15s (55%).

One in five parents of 5-15s, aware of the bar, were unsure whether this was in place on their child's mobile phone (21%). This response was more likely among parents of 12-15s (26%) than parents of 8-11s (12%).

When re-basing these figures on all children with a mobile phone (rather than on all parents aware of the bar on adult content), a third of parents of 5-15s say the bar is in place (34%), with this being more likely for 8-11s (41%) than for 12-15s (30%).

[122] Low base sizes prevent analysis among parents of 3-4s and 5-7s.

Figure 160: Awareness and use of bar on adult content for mobile phones, by age: 2016, 2017



QP61 - The UK mobile phone networks - O2, Vodafone, EE and so on - each have a block on adult or 18+ content which requires users to go through an age verification process before this content can be unblocked and received on the user's phone. Did you know about this bar on adult content before today? (unprompted responses, single coded) / QP62 - Do you know whether the bar on accessing adult content is set up on your child's mobile phone? (unprompted responses, single coded). Significance testing shows any change between 2016 and 2017

Base: Parents whose child has a mobile phone (633 aged 5-15, 199 aged 8-11, 407 aged 12-15)/ Parents of children aged 5-15 whose child has a mobile phone that are aware of the bar on adult content that can be set on the child's phone (351 aged 5-15, 1113 aged 8-11, 221 aged 12-15).

Parental rules for mobile phones

Rules about the child's mobile phone use are more likely for 8-11s than for 12-15s

As shown in Figure 161, most parents of 8-11s and 12-15s[123] whose child has their own mobile phone have put in place at least one of the rules that we asked about.[124]

Five of these six types or rules are more likely among parents of 8-11s than among parents of 12-15s: rules about with whom they are in contact (55% vs. 40%), how much time they spend using their phone (52% vs. 40%), downloading apps onto their phone (51% vs. 37%) and when they can

[123] Low base sizes prevent analysis among parents of 3-4s and 5-7s.
[124] Due to changes in the way that this question was asked in 2017 it is not possible to show a trend for this measure

use their phone (45% vs. 27%). Rules about how much money they can spend on their phone are equally likely for 8-11s (48%) as for 12-15s (44%).

At an overall level, rules about mobile phone use are less likely for 12-15s (68%) than for 8-11s (83%).

Figure 161: Parental rules for mobile phones, by age: 2017

All whose child has a mobile phone		Aged 8-11	Aged 12-15
Rules about…….	Base	199	407
How much money they can spend on their phone		48%	44%
Who they are in contact with on their phone		55%	40%
How much time they spend using their phone		52%	40%
Downloading apps onto their phone		51%	37%
When they can use their phone		45%	27%
TOTAL - ANY RULES ABOUT THEIR CHILD'S MOBILE PHONE USE		83%	68%

QP59 – Do you have any of these rules about the use that your child makes of their mobile phone? (prompted responses, multi-coded).

Base: Parents whose child has a mobile phone (199 aged 8-11, 407 aged 12-15).

Parental awareness of using games consoles/ players to go online

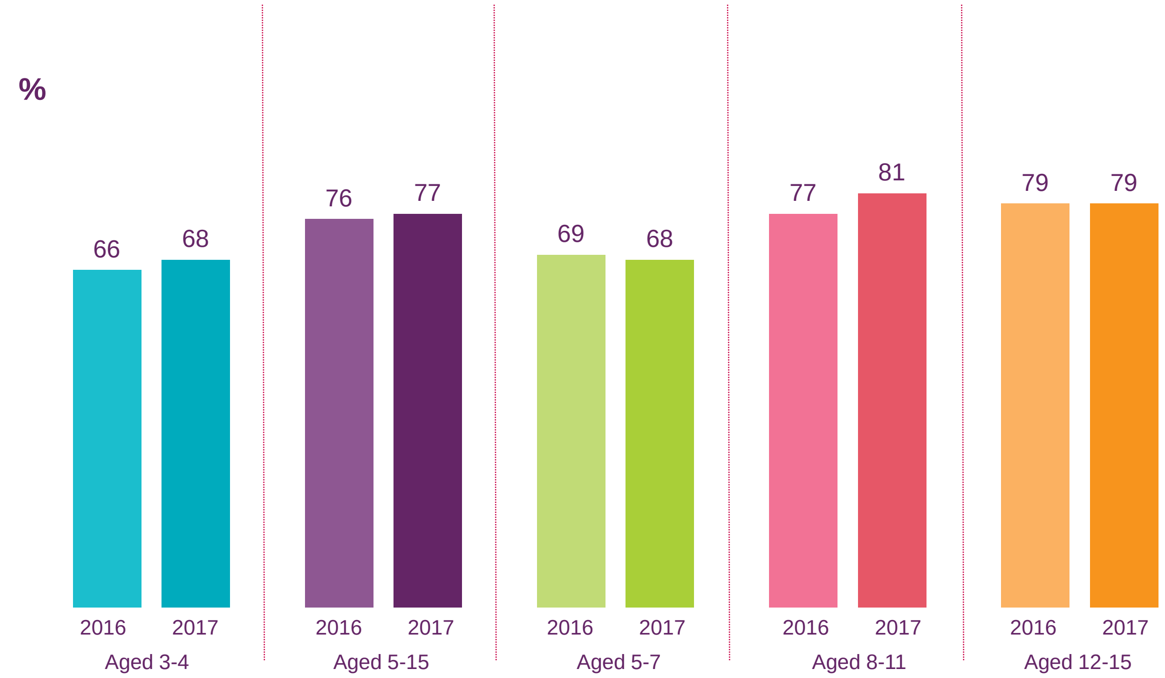
Two-thirds of parents of 3-7s and four in five parents of 8-15s are aware that games consoles/ players can be used to go online

Parents of 3-15s were asked whether they were aware that certain games consoles or players can be used to go online, watch and download TV programmes and other content, and to chat to other people.

As shown in Figure 162, two-thirds of parents of 3-4s (68%) and 5-7s (68%) are aware that games consoles/ players can be used in this way. This is lower than the four in five parents of 8-11s (81%) and 12-15s (79%) who say they are aware of this.

There has been no change in these awareness levels for any age group since 2016.

Figure 162: Parental awareness of use of games consoles/ players to go online: 2016, 2017



QP68 – Some games consoles and games players can be used to go online, watch and download TV and movies and to chat with others. Did you know this before today? (unprompted responses, single coded).

Base: All parents of children aged 3-4 or 5-15 (677 aged 3-4, 1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

Parental controls on gaming devices

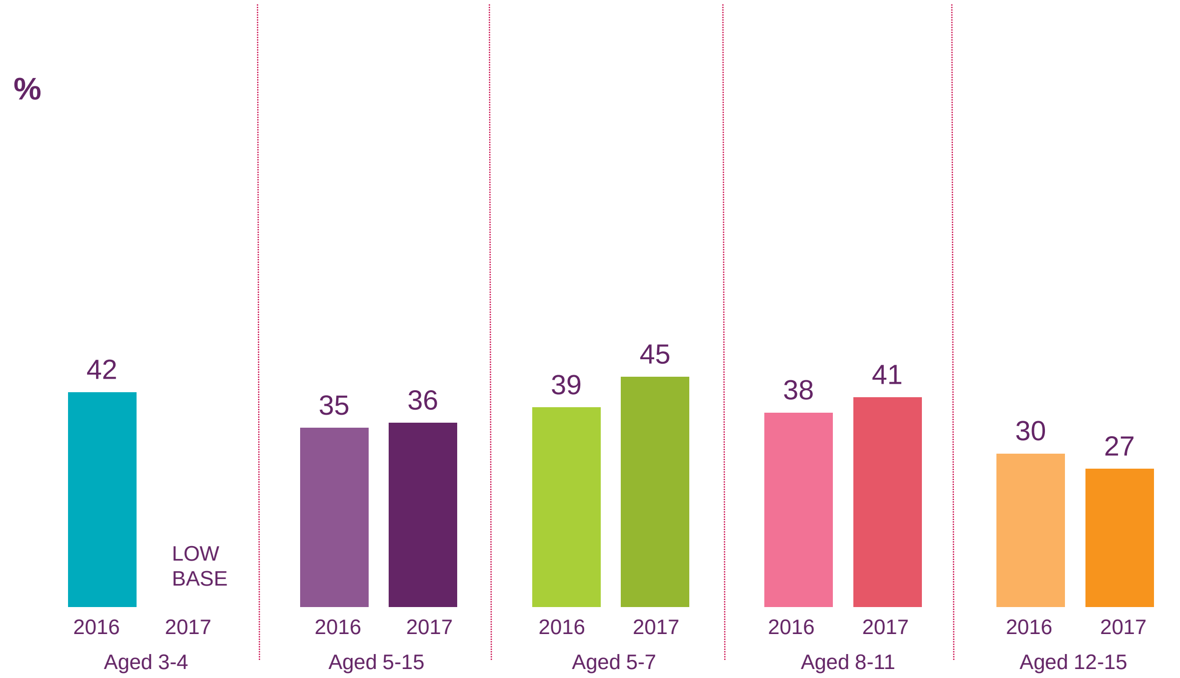
More than a third of parents of 5-15s have controls on the portable or fixed games console on which their child plays games

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

As shown in Figure 163, more than a third (36%) of parents of 5-15s[125] whose child plays games on either type of device have controls in place. Parents of 5-7s (45%) and 8-11s (41%) are more likely than parents of 12-15s (27%) to have these controls in place.

Compared to 2016, there has been no change in use of these controls for any age group.

Figure 163: Use of parental controls on games consoles/ games players by age: 2016 and 2017



QP71 – Are there any controls set on either the handheld games player or the games console connected to a TV? This might include things like time-limiting software that only allows them to play for a set amount of time or controls to stop your child playing games above a certain age rating or to restrict or prevent them going online. (unprompted responses, single coded).

Base: Parents whose child ever plays games on a handheld games console or a games console connected to a TV (711 aged 5-15, 139 aged 5-7, 290 aged 8-11, 282 aged 12-15). Significance testing shows any change between 2016 and 2017.

[125] Low base sizes prevent analysis among parents of 3-4 whose child plays games on a handheld or fixed gaming device

Rules about playing games

Four in five parents of 5-15s who play games have rules in place

Most parents whose child plays games on a gaming device[126] say that they have rules or restrictions about the games their child plays[127]. Rules are more likely to be in place for 5-7s (85%) and 8-11s (86%), than for 12-15s (68%) and 3-4s (73%).

There is only one rule in place among a majority of parents of 3-4s: only play games with an appropriate age rating (57%). This same rule is the only one in place among a majority of parents of 5-7s (68%). There are three rules in place among a majority of parents of 8-11s: only playing games with an appropriate rating (66%), only playing games with appropriate content (54%) and about how much time is spent playing games (54%). No single rule is in place among a majority of parents of 12-15s.

Parents of 5-7s and 8-11s are more likely than parents of 12-15s to have five individual rules in place: only playing games with an age-appropriate rating (68% for 5-7s, 66% for 8-11s vs. 43% for 12-15s), how much time is spent playing games (48% for 5-7s, 54% for 8-11s vs. 38% for 12-15s), when they can play games (46% for both 5-7s and 8-11s vs. 29% for 12-15s), who they can play games with (33% for 5-7s, 41% for 8-11s vs. 25% for 12-15s) and whether they can play games online (32% for 5-7s and 31% for 8-11s vs. 24% for 12-15s).

Figure 164: Parental rules for gaming, by age: 2017

All whose child plays games		Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Rules about…….	Base	264	1028	266	393	369
Only playing games with an age appropriate rating		57%	58%	68%	66%	43%
Only playing games with appropriate content (no violence/ nudity/ swearing etc.)		38%	47%	46%	54%	39%
How much time they spend playing games		41%	47%	48%	54%	38%
When they can play games		37%	39%	46%	46%	29%
Purchasing or downloading games or apps / in-app purchasing		24%	35%	34%	40%	32%
Who they can play games with		19%	33%	33%	41%	25%
Whether they can play games online		21%	29%	32%	31%	24%
TOTAL - ANY RULES ABOUT THE GAMES THEIR CHILD PLAYS		73%	79%	85%	86%	68%

QP67 - Do you have any of these rules about the games your child plays at home or elsewhere - whether on a games console or player, a computer, or any other device? (prompted responses, multi-coded).

Base: Parents of children aged 5-15 whose child ever plays games at home or elsewhere on any type of game playing device (264 aged 3-4, 1028 aged 5-15, 266 aged 5-7, 393 aged 8-11, 369 aged 12-15).

[126] This could be a fixed or portable games console/ computer or any other device.
[127] Due to changes in the way that this question was asked in 2017 it is not possible to show a trend for this measure

Technical controls on television services

In 2017, the questions relating to use of parental controls on the household television service were amended. These revised questions are reported on at Figure 165 to Figure 171, and trend data are therefore not available.

The questions focus initially on parental awareness and use of mandatory and voluntary PINs, as well as their opinions on effectiveness. They also ask whether the parent thinks the child is aware of the PINs in use, and whether the parent has removed adult channels from the TV service's on-screen menu of channels[128].

As the description of mandatory and voluntary PINs required explanation, parents were provided with a showcard giving the information below which they were asked to read before answering these questions:

PINs are typically 4-digit access codes that need to be used to watch certain programmes or access certain channels or services.

There are two different types of PINs.

1. **Mandatory PINs** are used by some TV service providers. They use them to restrict access to unsuitable content and they cannot be removed by the household, so are **always** in place.

   Examples of these are when the user has to enter a PIN to:

   - access content on a pay-per-view basis through services like Sky Movies, or
   - access either a premium subscription service or a pay-per-view service; e.g. to view adult content

2. **Voluntary PINs** can be set up by users to restrict children's access to unsuitable content, such as programmes with adult themes, sexual or violent content. Users can choose whether to set them or not.

   Examples include use of PINs to:

   - restrict access to particular TV channels or to watch recorded content that was originally broadcast after 9pm.

[128] Ofcom will be publishing more in-depth research on the use of PINs in 2018.

Three in five parents of 5-15s say their TV service provider uses mandatory PINs

After reading the description of the types of PINs, parents with a TV in the household were asked to think about mandatory PINs and were asked: "As far as you are aware does your TV service provider(s) use these mandatory PINs to restrict access to unsuitable content?"

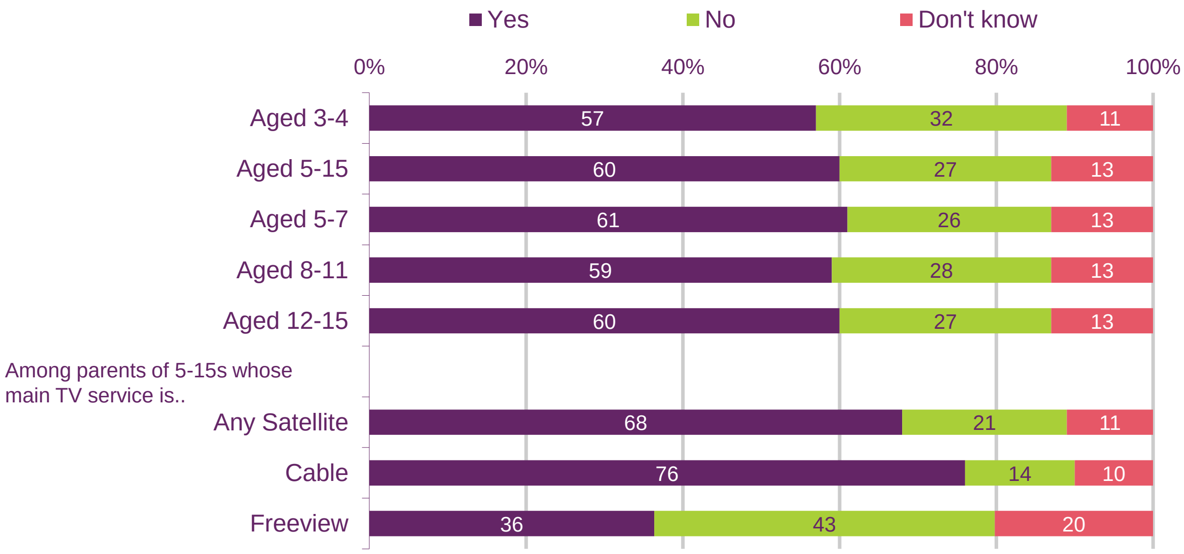
The results are shown in Figure 165. Around three in five parents of 3-4s (57%) say their TV service provider uses mandatory PINs, while a third (32%) say their provider does not; one in ten (11%) are unsure.

A similar proportion of parents of 5-15s say their TV service provider uses mandatory PINs (60%) while a quarter (27%) say they do not and one in eight (13%) are unsure. Results do not vary by age among parents of 5-15s.

There is some variation in response by the main type of TV service in use at home[129]. Three-quarters of parents of children aged 5-15 (76%) whose main TV service is cable say their provider uses mandatory PINs to restrict access to unsuitable content. This compares to less than seven in ten saying this whose main TV service is satellite (68%), and a third of those whose main TV service is Freeview (36%). Among those whose main TV service is cable, 10% say they are unsure; this rises to 20% among those whose main TV service is Freeview.

[129] In 2017, among parents of 5-15s with a TV service in the household, 52% say their main service at home is satellite, 24% say it is Freeview, while 14% say it is cable. The remaining 10% either nominate BT TV, TalkTalk TV, Now TV, or are unsure.

Figure 165: Awareness of whether mandatory PINs are in use on household TV service(s) among parents of 3-15s: 2017



QP18 – Can I please ask you to read the following information about personal identification numbers or PINs on your TV service? PINs are typically 4-digit access codes that need to be used in order to watch certain programmes or access certain channels or services. There are two different types of PINs, mandatory PINs and voluntary PINs (description of both types of pin provided by interviewer for respondent to read). First of all I'd like you to think about mandatory PINs. As far as you are aware does your TV service provider/ do your TV service providers use these mandatory PINs to restrict access to unsuitable content? (unprompted responses, single coded).

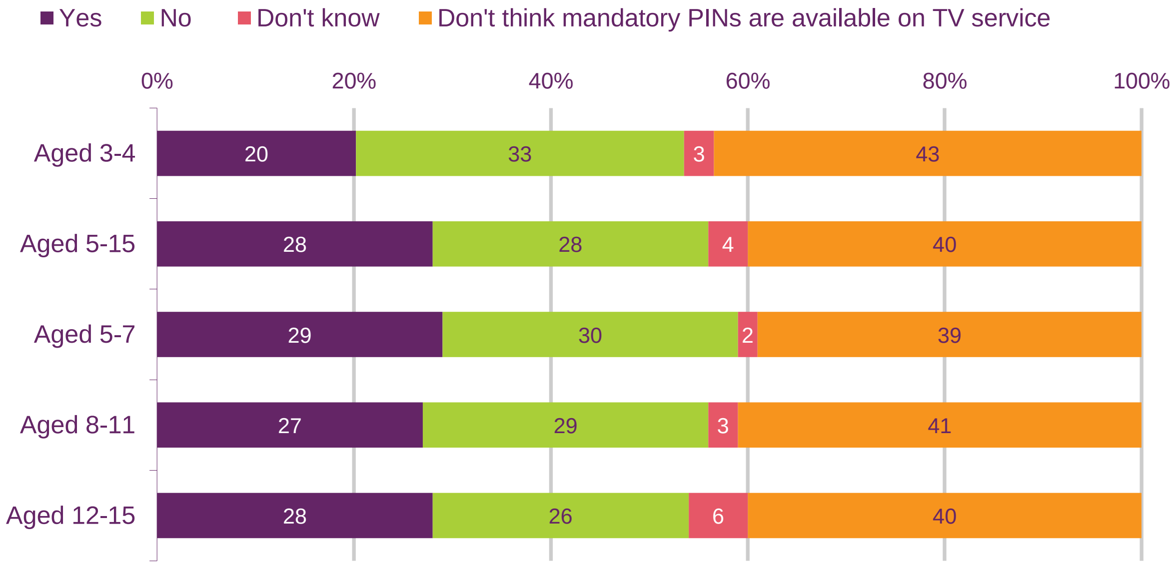
Base: Parents of children with a TV set in the household (667 aged 3-4,1370 aged 5-15, 405 aged 5-7, 489 aged 8-11, 476 aged 12-15).

One in five parents of 3-4s and close to three in ten parents of 5-15s say their child's viewing has been blocked by a mandatory PIN

Parents who were aware of their TV service provider(s) using mandatory PINs were then asked whether their child's viewing had ever been blocked by a mandatory PIN on any of the TV services used by their child at home.

Figure 166 shows the results expressed as a proportion of those with a TV set in the household. One in five parents of 3-4s (20%) say their child's TV viewing has ever been blocked by a mandatory PIN. Parents of 5-15s are more likely to say this (28%), and this incidence does not vary by age for 5-7s (29%), 8-11s (27%) or 12-15s (28%).

Figure 166: Incidence of child's viewing ever being blocked by a mandatory PIN: 2017



QP18A – And as far as you are aware, has your child's viewing ever been blocked by a mandatory PIN on any of the TV services you use at home (unprompted responses, single coded).

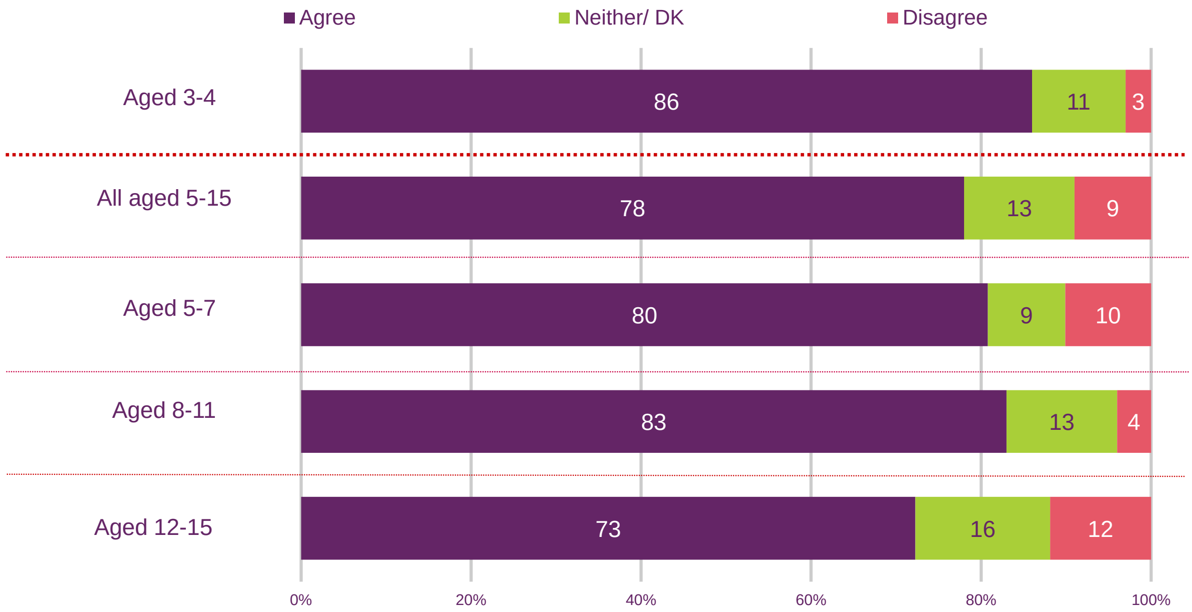
Base: Parents of children with a TV set in the household (667 aged 3-4,1370 aged 5-15, 405 aged 5-7, 489 aged 8-11, 476 aged 12-15).

Three-quarters of parents of 5-15s whose viewing had ever been blocked by a mandatory PIN felt that they were effective

Parents whose child's viewing had ever been blocked by a mandatory PIN were then asked the extent to which they agreed with the following statement: "The mandatory PINs in place on my TV service(s) are effective in managing my child's TV viewing".

Parents of 3-4s are more likely to agree that the mandatory PINs are effective (86%) compared to parents of 5-15s (78%). Agreement does not vary by age among parents of 5-15s. Only 3% of parents of 3-4s and 9% of parents of 5-15s disagreed with the statement.

Figure 167: Parental agreement with "the mandatory PINs in place on my TV service(s) are effective in managing my child's TV viewing", by age: 2017



QP18B – To what extent do you agree with the following statement I am going to read out – The mandatory PINs in place on my TV service(s) are effective in managing my child's TV viewing (prompted responses, single coded).

Base: Parents whose child has had their TV viewing blocked by a mandatory PIN (134 aged 3-4, 384 aged 5-15, 115 aged 5-7, 132 aged 8-11, 137 aged 12-15).

Parents of 8-11s are more likely than parents of younger children or parents of 12-15s to use voluntary PINs

Parents of 5-15s with a TV set in the household were asked to think about voluntary PINs and were asked whether it was possible to set up voluntary PINs to restrict access to unsuitable content on any of the TV services used at home. Those parents who said their TV service allowed them to do this were then asked whether they had set up voluntary PINs.

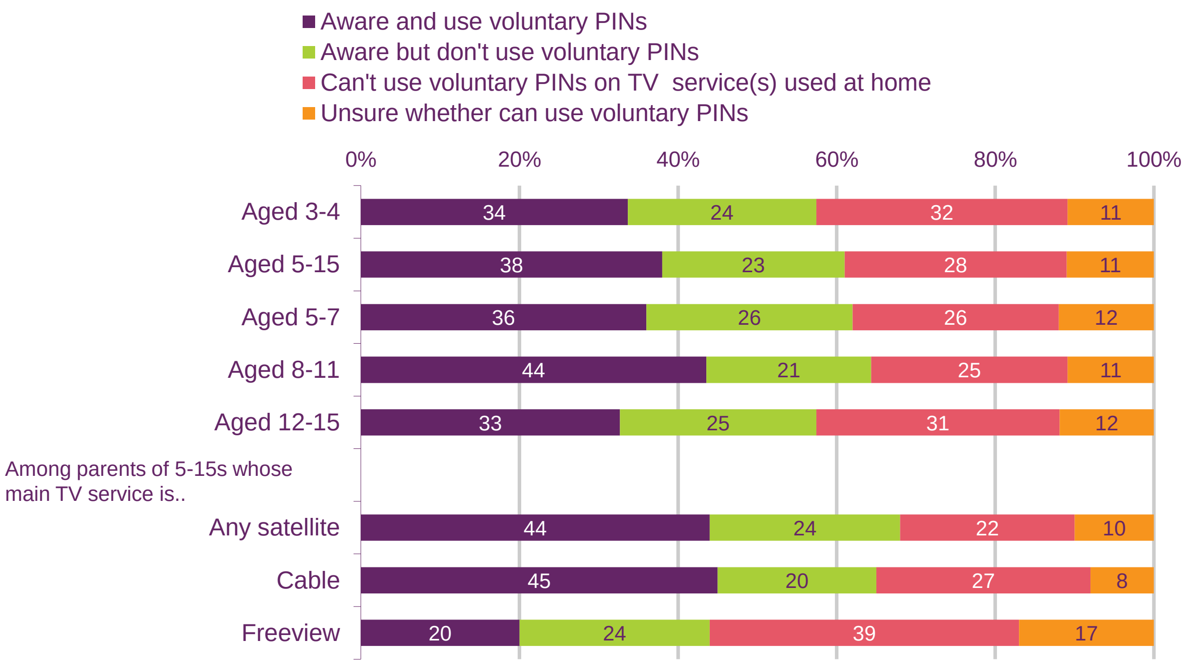
The results are shown in Figure 168, expressed as a proportion of all parents with a TV set in the household.

A majority of parents of 3-4s (57%) and 5-15s (61%) say it is possible to set up voluntary PINs on the TV service(s) they use at home. Results do not vary by age among parents of 5-15s (62% for 5-7s, 64% for 8-11s and 58% for 12-15s).

While around one third of parents of 3-4s (34%), 5-7s (36%) and 12-15s (33%) say they use voluntary PINs, use is higher among parents of 8-11s (44%).

Results also differ based on the type of TV service used at home. Parents of 5-15s whose main TV service at home is satellite (68%) or cable (65%) are more likely than those whose main service is Freeview (44%) to say it is possible to set up voluntary PINs, and they are more likely to use them (44% for satellite, 45% for cable vs. 20% for Freeview).

Figure 168: Use of voluntary PINs on TV service(s) used at home, by age: 2017



QP19 – I'd now like you to think about voluntary PINs. As far as you are aware is it possible to set up voluntary PINs to restrict access to unsuitable content on any of the TV services you use at home (unprompted responses, single coded)/ QP19A – And do you use voluntary PINs to manage your child's viewing on any of the TV services you use at home? (unprompted responses, single coded).

Base: Parents of children with a TV set in the household (667 aged 3-4,1370 aged 5-15, 405 aged 5-7, 489 aged 8-11, 476 aged 12-15).

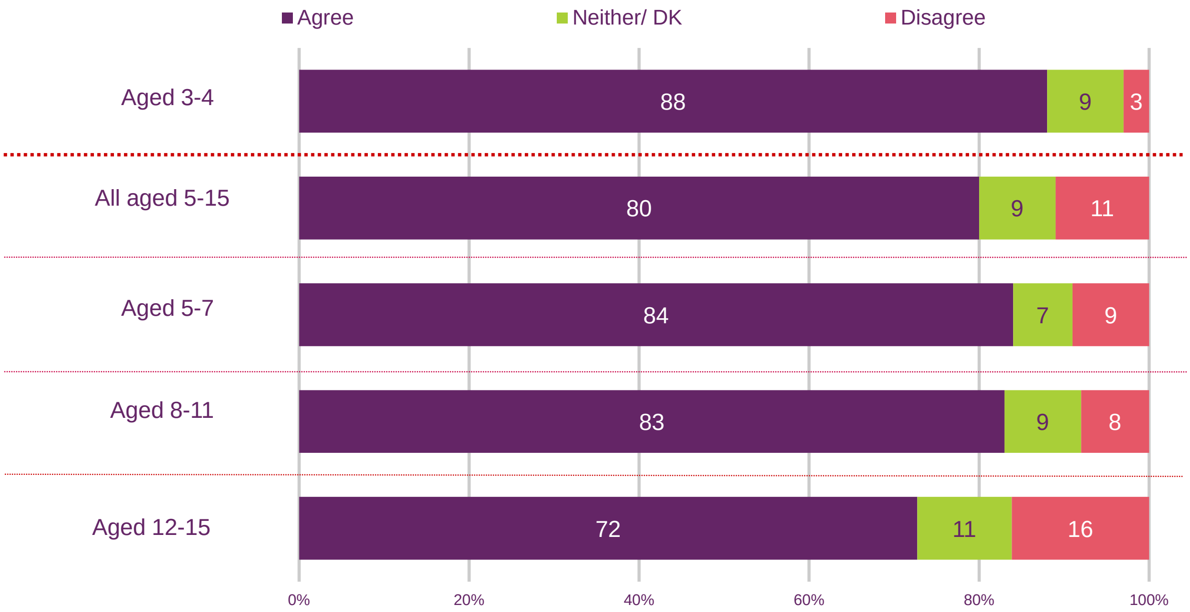
Parents of 12-15s are less likely than parents of younger children to say that the voluntary PINs they use are effective in managing their child's TV viewing

Parents who use voluntary PINs were also asked the extent to which they agreed with the following statement: "The voluntary PINs in place on my TV service(s) are effective in managing my child's TV viewing".

More than four in five parents of 3-4s (88%), 5-7s (84%) and 8-11s (83%) agree that the voluntary PINs are effective; this is significantly higher than the seven in ten parents of 12-15s who say this (72%).

Relatively few parents of 3-4s disagree (3%) rising to one in six parents of 12-15s (16%)

Figure 169: Parental agreement with "the voluntary PINs in place on my TV service(s) are effective in managing my child's TV viewing", by age: 2017



QP19B – To what extent do you agree with the following statement I am going to read out: The voluntary PINs in place on my TV service(s) are effective in managing my child's TV viewing (prompted responses, single coded).

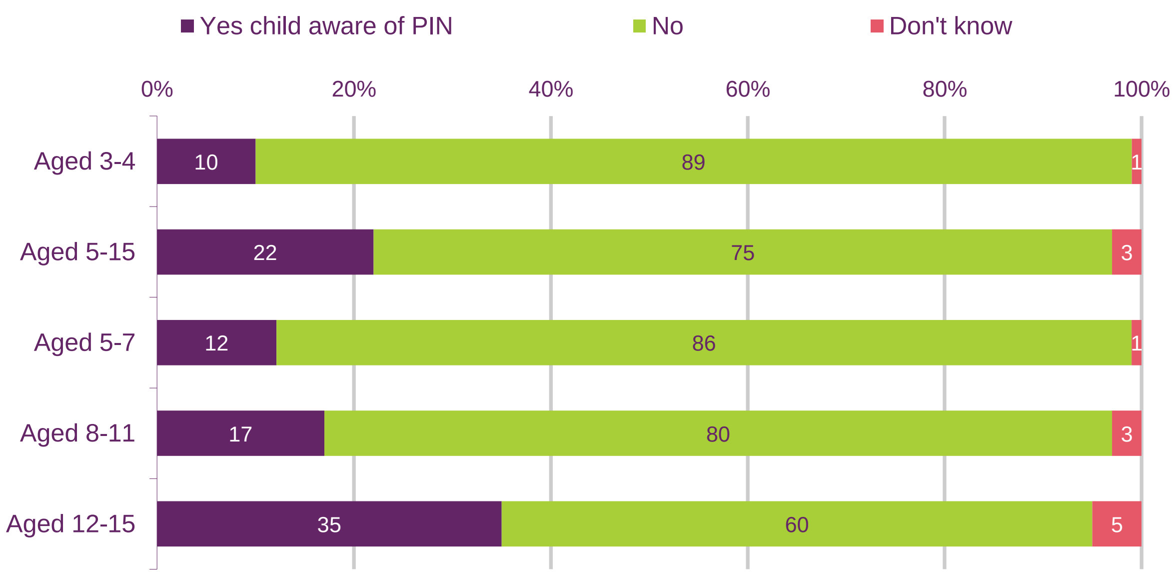
Base: Parents whose use voluntary PINs (221 aged 3-4, 510 aged 5-15, 145 aged 5-7, 207 aged 8-11, 158 aged 12-15).

One in three parents of 12-15s who use PINs on their TV service say their child knows the PIN

Parents of 5-15s using either mandatory or voluntary PINs were asked whether their child knows the PIN that is used.

As shown in Figure 170, around one in ten parents of 3-4s (10%) or 5-7s (12%) say that their child knows the PIN. Twice as many parents of 12-15s (35%) as parents of 8-11s (17%) say this.

Figure 170: Child's awareness of PINs used on TV services, by age: 2017



QP20 - As far as you are aware, does your child know any of the PINs that have been set on any of your TV services? (unprompted responses, single coded).

Base: Parents who use mandatory or voluntary PINs on their TV service(s) (271 aged 3-4,649 aged 5-15, 187 aged 5-7, 245 aged 8-11, 217 aged 12-15).

More than one in five parents say they have removed the adult channels from the on-screen menu of channels, and two in five parents are unsure whether this is possible

Parents of 3-4s and 5-15s with a TV set in the household were asked whether their TV service provider(s) allowed them to remove the adult channels from the on-screen menu of channels, so they cannot be seen. Those who said this was possible were then asked whether they had removed these channels. The results are shown in Figure 171.

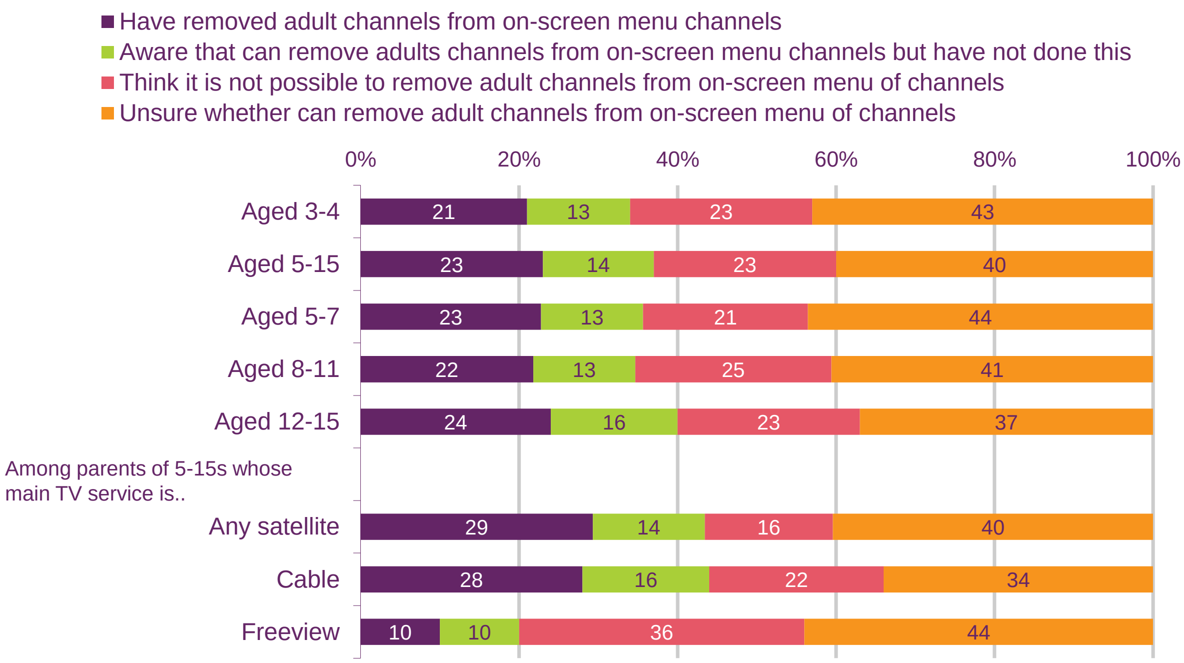
A third of parents of 3-4s (34%) say they can remove adult channels from their TV services; comparable to the 37% of parents of 5-15s who say this. Although there is no difference by age in this measure among all parents of 5-15s, parents of 12-15s (40%) are more likely than parents of 3-4s (34%) to say this.

Around two in five parents of 3-4s (43%) and 5-15s (40%) are unsure whether it is possible to remove adult channels from the on-screen menu of channels; this response is more likely among parents of 3-4s (43%) than among parents of 12-15s (37%).

There is no difference by age in the proportion of parents who say they have removed adult channels from the on-screen menu. Around one in five parents of 3-4s (21%) and 5-15s (23%) say they have done this. So approximately three in five of those parents who are aware that channels can be 'hidden' have done this.

Parents of 5-15s whose main TV service is satellite (44%) or cable (45%) are more likely than those whose main service is Freeview (20%) to say that they can remove adult channels, and to say they have done this (29% for satellite, 28% for cable vs. 10% for Freeview).

Figure 171: Removal of adult channels from the EPG, by age of the child: 2017



QP21A – As far as you are aware does your TV service provider(s) allow you to remove adult channels from the on-screen menu of channels, so they cannot be seen (unprompted responses, single coded)/ QP21B – And have you removed adult channels from the on-screen menu of channels? (unprompted responses, single coded).

Base: Parents of children with a TV set in the household (667 aged 3-4,1370 aged 5-15, 405 aged 5-7, 489 aged 8-11, 476 aged 12-15).

Awareness and use of PIN controls on catch-up services

More than four in ten parents of 3-4s and half of parents of 5-15s have set up a PIN or password on broadcaster catch-up services

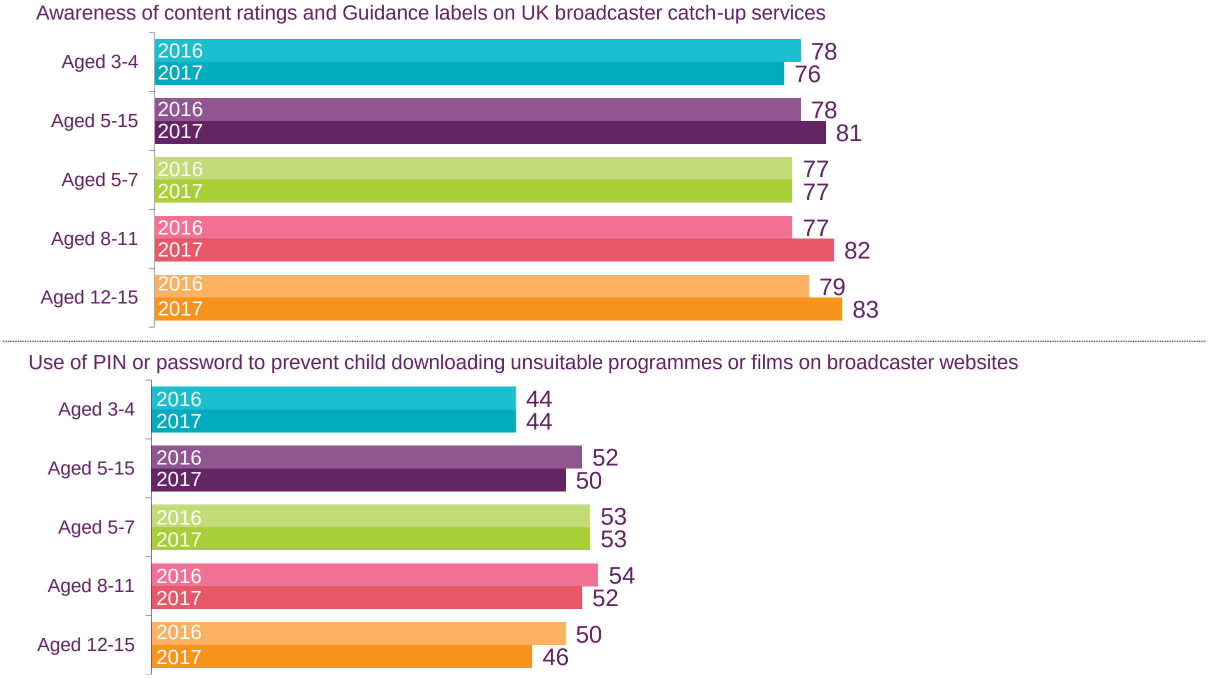
In 2017, parents of children aged 3-4 and 5-15 were provided with the following information: "Thinking specifically about the catch-up services of UK broadcasters (e.g. BBC iPlayer, ITV Hub etc), these services offer information about the age suitability of programmes. This information can be in the form of ratings (e.g. G for guidance, 12, 15, 18) or labels (such as 'violence', 'sex', 'drug use', or 'strong language'). They may appear as a pop-up screen asking for age confirmation before accessing the content".

Parents were then asked whether they were aware of these content ratings and guidance labels. The results are shown in Figure 172. Three-quarters of parents of 3-4s (76%) are aware of the content ratings and guidance labels in use on broadcaster catch-up services. Awareness among parents of 5-15s is higher, at 81%. Parents of 12-15s (83%) are more likely than parents of 5-7s and 8-11s (both 77%) or parents of 3-4s (76%) to be aware. There has been no change in these awareness levels since 2016.

Parents of 3-4s and 5-15s were also asked whether they had set up a PIN code or password on any of these catch-up services to prevent their child watching or downloading unsuitable programmes or films (Figure 172). More than four in ten of parents of 3-4s have set up a PIN/ password (44%); less likely than among parents of 5-15s (50%). Parents of 5-7s (53%) and 8-11s (52%) are more likely than parents of 12-15s (46%) to have set up a PIN/ password.

There has been no change in use of PIN/ passwords on broadcasters' websites since last year.

Figure 172: Awareness of content ratings and guidance labels on UK broadcaster catch-up services, and use of PINs/ passwords on these services among parents, by child's age: 2016, 2017



QP11A –Thinking specifically about the catch-up services of UK broadcasters (e.g BBC iPlayer, ITV Hub, All 4 etc), these services offer information about the age suitability of programmes. This information can be in the form of ratings (e.g. G for guidance, 12, 15, 18) or labels (such as 'violence', 'sex', 'drug use', or 'strong language'). They may appear as a pop-up screen asking for age confirmation before accessing the content. Did you know that, before today? (prompted responses, single coded)/ QP11B - Have you set up a PIN code or password on any of these catch-up services to prevent your child watching or downloading unsuitable programmes or films? (prompted responses, single coded).

Base: All parents of children aged 3-4 or 5-15 (677 aged 3-4, 1388 aged 5-15, 412 aged 5-7, 497 aged 8-11, 479 aged 12-15) - significance testing shows any change between 2016 and 2017.

Rules about television viewing

More than four in five parents whose child watches TV have rules in place about their child's viewing

Four in five parents of 3-4s whose child watches TV say they have rules in place (82%), with a majority saying they have rules about what they watch (63%). Half of these parents (49%) say they have rules about what their child watches or when they watch (49%) with fewer saying they have rules about whom they are watching with or only watching when supervised (38%).

Household rules for television viewing are more likely to be in place for 5-7s (91%) and 8-11s (87%) than for 12-15s (73%). This is also true for each of the four individual rules shown in Figure 173.

There are three rules in place among a majority of parents of 5-7s and 8-11s compared to only one among a majority of parents of 12-15s, which relates to rules about what they watch (60% for 12-15s).

Figure 173: Parental rules for television, by age: 2017[130]

All whose child watches television		Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Rules about…….	Base	657	1360	408	485	467
What they watch		63%	72%	80%	78%	60%
When they watch		49%	54%	60%	59%	45%
How much time they spend watching		49%	52%	58%	55%	44%
Who they are watching with/ can only watch when supervised		38%	29%	35%	33%	21%
TOTAL - ANY RULES ABOUT THE TV/ DVDs THEIR CHILD WATCHES		82%	83%	91%	87%	73%

QP12 – Do you have any of these rules about the TV and DVDs that your child watches? (prompted responses, multi-coded).

Base: Parents of children aged 3-4 or 5-15 whose child watches TV at home or elsewhere (657 aged 3-4, 1360 aged 5-15, 408 aged 5-7, 485 aged 8-11, 467 aged 12-15).

[130] Due to changes in the way that this question was asked in 2017, it is not possible to show a trend for this measure

Differences by gender and socio-economic group

Parents of boys aged 12-15 are more likely than parents of girls to say they do not use any of the mediation approaches

Differences in parental mediation approaches by gender are summarised below.

Online mediation

- Looking across the mediation approaches, parents of boys aged 12-15 who go online are more likely than parents of girls to say they do not use any of the four mediation approaches (11% vs. 3%); that is they do not use any of the more general technical tools, they do not use rules, they do not supervise their child when online and they have not spoken to them about staying safe online at least every few weeks.
- Parents of girls aged 5-7 with broadband at home where the child goes online are more likely than parents of boys to say they have stopped using parental control software (4% vs. 0%)
- Parents of boys aged 5-15 with broadband at home where the child goes online who use home network-level filters are more likely than parents of girls to say this control is not useful (5% vs. 1%) and that this control blocks too much content (14% for boys vs. 7% for girls). In contrast parents of girls aged 5-15 are more likely to say this control blocks the right amount of content (78% vs. 66%)
- While no more likely to use this technical tool, parents of boys aged 12-15 with broadband at home where the child goes online are more likely than parents of girls to be aware of restricted mode on YouTube (42% vs. 33%).
- Parents of girls aged 5-7 are more likely than parents of boys to say they supervise their child's use of the internet by sitting beside them and watching/ helping them (58% vs. 45%). Parents of girls aged 12-15 are more likely to say they are nearby and regularly check what their child is doing online (40% vs. 29%). In contrast, parents of boys aged 12-15 say they check the browser or device history after their child has been online (45% vs. 33% for girls).

Mobile phone mediation

- Parents of girls aged 5-15 with a mobile phone are more likely than parents of boys to have two rules about mobile use in place; whom their child is in contact with on the phone (50% vs. 41%) and how much time they spend using the phone (49% vs. 41%).

Games console/player mediation

- Parents of boys aged 12-15 are more likely than parent of girls to be aware of how games consoles or players can be used to go online, download content and to chat with other people (84% vs. 74%).
- There are also differences by gender in the types of rules about gaming. Parents of boys aged 8-11 (60% vs. 46%) and 12-15 (44% vs. 30%) are more likely than parents of girls to say they have a rule about how much time they spend playing games. Parents of boys aged 12-15 are also more likely to have the rule about whom the child can play games with (30% vs. 17%).

TV mediation

- Parents of boys aged 8-11 with a TV in the household are more likely than parents of girls to say they have removed adult channels from the on-screen menu (26% vs. 17%).

Compared to the average, awareness of content filters is lower in DE households

Differences in parental mediation approaches by household socio-economic group among 5-15s are summarised below.

Online mediation

- Compared to the average (40%), parents of 5-15s who go online in DE households are less likely to use all four mediation approaches (33%) - so parental supervision, rules about what the child does online, any of the six types of technical tools and talking to their child about staying safe online at least every few months.
- Parents of 3-4s in ABC1 households with broadband at home where the child goes online are more likely than those in C2DE households[131] to use home network-level content filters (44% vs. 33%)
- Compared to the average, parents of 5-15s with broadband at home where the child goes online in DE households are less likely to be aware of both types of content filters: home network-level filters (51% vs. 62%) and parental control software (55% vs. 65%). They are also less likely to use both of them (27% vs. 37% for home network-level filters and 25% vs. 31% for parental control software).
- Parents of 5-15s with broadband at home where the child goes online in AB households are more likely than average to be aware of parental control software (73% vs. 65%), but are no more likely to use this type of content filter. Those in C1 households are no more likely to be aware of home network-level filters but are more likely than average to use them (43% vs. 37%).
- Parents of 5-15s in C2DE households using parental control software are more likely than those in ABC1 households to say this content filter does not block enough content (15% vs. 7%)
- Parents of 5-15s with broadband at home where the child goes online in DE households are less likely than average to be aware of (41% vs. 49%) and to use (16% vs. 22%) parental controls built into the device by the manufacturer.
- Parents of 5-15s whose child uses a smartphone or tablet in AB households are more likely than average to be aware of two particular tools for these devices; changing the settings to prevent apps being downloaded (51% vs. 44%) and parental control software that can be used to restrict access to content or to manage use of the device (52% vs. 42%). They are, however, no more likely to use these tools. For this latter tool, awareness is lower for parents of 5-15s in DE households (35% vs. 42%).
- Compared to parents of 3-4s who go online in ABC1 households, those in C2DE households are more likely to say they have only ever spoken to their child once about how to stay safe online (4% vs. 0%).

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[131] Due to low base sizes it is not possible to show results by all four socio-economic group

- Compared to the average for parents of 5-15s who go online, those in AB households are more likely to say they have looked for or received information or advice from websites about how to manage online risks (85% vs. 78%) and to say they have used two specific sources: internet service providers (21% vs. 14%) and manufacturers/ retailers selling the product (12% vs. 8%). These same two sources are less likely used by those in DE households (8% for ISPs and 4% for manufacturers or retailers). There are also differences among parents of 3-4s whose child goes online; parents in ABC1 households are more likely than those in C2DE households to use three specific sources: ISPs (17% vs. 5%), other websites with information about how to stay safe online (12% vs. 2%) and from manufacturers/ retailers selling the product (11% vs. 3%).
- At an overall level, the use of rules about what the child does online does not vary by household socio-economic group. However, compared to the average, parents of 5-15s in AB households are more likely to use five of the six individual rules: whom they can contact online (66% vs. 58%), the information they can share online (59 vs. 51%), how much time they can spend online (59% vs. 49%), spending money online (56% vs. 49%) and when they can go online (48% vs. 39%). Three of these rules are less likely to be used by parents of 5-15s in DE households: rules about the information they can share online (43% vs. 51%), how much time they can spend online (40% vs. 49%) and when they can go online (33% vs. 39%). In contrast, parents of 3-4s in C2DE households are more likely than those in ABC1 households to use two rules about their child's internet use: those that relate to the types of websites or apps that they can use (65% vs. 53%) and about whom they can contact online (36% vs. 23%).

Mobile phone mediation

- Compared to the average for parents of 5-15s whose child has a mobile phone, those in DE households are less likely to say they use three rules: rules about whom their child is in contact with (34% vs. 45%), downloading apps (31% vs. 43%), and when they can use the phone (25% vs. 34%). Rules about downloading apps onto the phone are more likely among parents of 5-15s in AB households (56% vs. 43%).

Games console/player mediation

- Six out of the seven rules about gaming are more prevalent in AB households and less prevalent in DE households, compared to the average in households with 5-15s who play games. They are: rules relating to only playing games with appropriate content (57% for ABs vs. 47% overall vs. 40% for DEs), how much time is spent playing games (60% vs. 47% vs. 39%), when children can play games (52% vs. 39% vs. 33%), purchasing/ downloading games or apps or in-app purchases (50% vs. 35% vs. 28%), with whom they can play (42% vs. 33% vs. 25%) and whether they can play games online (39% vs. 29% vs. 20%). Despite these differences, the overall incidence of rules does not vary compared to the average for parents of 5-15s in DE households, although they are more likely in AB households (85% vs. 79%).

TV mediation

- Parents of 3-4s in ABC1 households are more likely than those in C2DE households to say their TV service provider uses mandatory PINs to restrict access to unsuitable content (63% vs. 50%) and that their child's viewing has been blocked by a mandatory PIN (25% vs. 16%).
- Parents of 5-15s in AB households are more likely than average to say their TV service provider uses mandatory PINs (68% vs. 60%) while those in DE households are less likely (53% vs. 60%). Parents of 5-15s in DE households are also less likely to say their child's viewing has been blocked by a mandatory PIN (21% vs. 28%).
- While there are no differences in awareness of whether the household's TV service can use voluntary PINs, by household socio-economic group among parents of 5-15s, compared to the average (38%), parents in AB households are more likely to say they use them (45%) and those in DE households are less likely (32%).
- Compared to the average (81%), parents of 5-15s in DE households (75%) have lower awareness and those in AB households have higher awareness (87%) of content ratings and guidance labels on UK broadcasters' catch-up services. Adults in AB households are more likely than average to have set up a PIN or password on these services (62% vs. 50%) while DEs are less likely (39%).

A1. Children's TV viewing: BARB analysis

Introduction

Broadcast TV viewing

BARB figures provide the industry measure of viewing for UK television audiences. Analysis is based on viewing of scheduled TV programmes watched on the TV set through any device connected to it, including set-top boxes, digital video recorders (DVRs), DVD players and games consoles. Catch-up and recorded viewing is also captured under 'time-shifted viewing' if the content has been broadcast live in the past seven days. Live and time-shifted viewing make up the official industry measure of viewing, often referred to as consolidated gold standard data, on which our analysis is based. Viewing is reported for people aged 4 and above. This analysis focuses on viewing among children aged 4-15.

Overall viewing trends

Time spent viewing broadcast television

Viewing of broadcast television remains widespread among UK children: on average in 2016 the weekly reach of live broadcast television among 4-15 year-olds[132] was 86%.

Children aged 4-15 watched an average of just under 12 hours of broadcast television per week in 2016, down by over an hour per week on 2015 (Figure A1.1). The decline is a continuation of longer-term annual falls in weekly viewing; 2016 saw a larger decline than 2015 (45 minutes) but not as large as that in 2014 when viewing fell by nearly two hours.

Younger children watch more TV than older children. In 2016, children aged 4-9 watched an average of 13 hours per week compared to just over ten and a half hours per week among children aged 10-15.

The decline in weekly viewing among all children has been particularly steep since 2012. The drop has been driven mainly by the 10-15 age group, who watched 5 hours 51 minutes less per week on average in 2016 than in 2012. Viewing fell by 3 hours 53 minutes among 4-9 year-olds over the same period.

The amount of time children spend viewing the main five PSB channels (BBC One, BBC Two, ITV1, Channel 4 and Channel 5) and their respective portfolios has been more resilient than for other channels, having decreased to a lesser extent.

Children's share of viewing to PSB channels and their portfolio channels (i.e. the proportion of children's viewing to those channels out of all channels) has been fairly consistent in recent years. Between 2011 and 2016, the main five PSB channels represented around 30% of viewing, and the PSB families combined represented around 56% of viewing (Figure A1.2).

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[132] Weekly reach is defined as the proportion of this age group in households with a working TV set who watched at least 15 consecutive minutes of broadcast TV in a week.

However, the proportion of all children in households with a working TV set who watch at least 15 consecutive minutes of the main five PSB channels in a week 'average weekly reach', has declined. Between 2015 and 2016 the average weekly reach decreased by one percentage point to 64%, the same reduction as for all TV among children. However, between 2011 and 2016 the decrease in the proportion of children who watched the main five PSBs in a week was larger than the decrease in the proportion of children watching television overall: 14 percentage points, compared to six percentage points for total TV. This decrease in average weekly reach has been driven by older children (aged 10-15). Average monthly reach for the main five channels is higher than average weekly reach, at 83% of 4-15s.

Of the five channels, BBC One had the biggest reach, followed by ITV1. BBC One had an average weekly reach of 43% in 2016 (39% among 4-9s and 47% among 10-15s) and an average monthly reach of 68% (66% among 4-9s and 70% among 10-15s). ITV1 had an average weekly reach of 34% (31% among 4-9s and 37% among 10-15s) and an average monthly reach of 57% (54% among 4-9s and 60% among 10-15s).

Live broadcasts vs. time-shifting

Figure A1.3 shows that most of the time spent viewing TV among children aged 4-15 in 2016 was to programmes at the time of broadcast (83%). This was a slight decline of two percentage points (pp) since 2015 and a seven pp fall since 2011. Yet, despite over three-quarters of the child population having access to digital video recorders in their home (79% in 2016 vs. 66% in 2011), viewing of recordings or catch-up services (time-shifted viewing) accounted for only 17% of total TV viewing time among all children aged 4-15. The proportion of time-shifted viewing among younger children (aged 4-9) and older children (aged 10-15) was equal, at 17%[133].

Total TV screen time

Besides the standard industry data sets of seven-day consolidated viewing, BARB makes available other data that it collects. One of these is time-shifted viewing between eight and 28 days after the initial broadcast. Another is unmatched viewing[134], which refers to activities when the TV set is in use but the content cannot be matched to broadcast TV programmes and films (this can include subscription VoD like Netflix, apps on smart TVs, DVDs and gaming). Both of these were introduced in July 2013. For children, time-shifted and unmatched viewing on the TV set both increased in 2015 and 2016, but have not fully compensated for the declines in live viewing. On average, per week, children's live viewing decreased by just over an hour (1 hour 9 minutes) from 2015 to 2016, while all time-shifted viewing and unmatched viewing together increased by just over half an hour (35 minutes), with the majority of this increase coming from unmatched viewing (Figure. A1.4). This

[133] The time-shifted data for 2011, reported in the Annex of the 2012 Children's and Parents' Media Use and Attitudes report, uses a base of all children (4-15) with a DVR. The data reported in the Annex of the 2013 report and subsequent annual reports uses a base of all children (4-15).

[134] Unmatched viewing = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing to DVDs/box sets/archives, SVoD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation of EPG guides where there is no in-picture linear content. Digital radio stations are excluded. Unmatched viewing has been reported by BARB since July 2013.

shows that not only are children spending less time using the TV set overall, the type of content they are watching when they use the TV set is changing.

When are children viewing?

Throughout the day, the average number of children aged 4-15 watching TV at the time of broadcast increases during breakfast hours (6am to 9am), before tailing off and then gradually growing again from 3pm, after school hours (Figure A1.5). The largest number of child viewers in 2016 was concentrated around family viewing time, between 6pm and 9pm. The size of the audience peaked at over 1.3 million, or 15% of the child TV population, between 7pm and 8pm.

The audience for younger children (aged 4-9) peaks slightly earlier. In 2016 the biggest volume of viewers in this age group was between 6pm and 7pm, with just under 800,000 viewers (16% of the 4-9-year-old TV population). The peak audience among children aged 10-15 was an hour later than the average for all children, with audiences highest between 8pm and 9pm (16% of the 10-15 year-old population).

In terms of post-watershed viewing, a significant volume of children continued to watch live TV in the first hour after the watershed. Almost one million child viewers aged 4-15 watched TV between 9pm and 10pm in 2016, representing 10% of the child population. Our analysis of the children's top 20 most popular programmes originally broadcast after 9pm, based on consolidated viewing[135], (Figure. A1.14) in 2016, shows that they were largely the same as the most popular titles among all individuals overall.

Post-9pm broadcasts of programmes that are usually watched during family viewing time featured in the list, such as *EastEnders* (Christmas day special), *Strictly Come Dancing* (the Friday series opener), *Britain's Got Talent* (semi-finals) and *Coronation Street* (on the same night as the *Britain's Got Talent* semi-final), along with New Year's Eve programming. The majority of the most-watched post-9pm programmes were scheduled in the first hour between 9pm and 10pm, and this is reflected in Figure A1.5, which shows that the child audience watching live fell sharply at 10pm and continued to fall each hour into the early morning.

Although the proportion of the child audience is broadly evenly split between younger and older viewers in the run-up to the watershed, after 9pm the distribution increases towards children aged 10-15. Between 9pm and midnight in 2016, 37% of the small number of children viewing at that time were aged 4-9 and 63% were aged 10-15.

What types of programming are children watching?

While total TV viewing hours are in decline among all children, the proportion of time spent, by channel group, remained broadly similar year on year (Figure A1.6). Overall, three-quarters of children's viewing was spent watching commercial channels (both children's and adults', including the commercial PSBs[136]). This proportion of viewing in commercial airtime has increased slightly over the past six years (from 72% in 2011 to 76% in 2016) with a shift towards an increased proportion of weekly viewing to the commercial multi-channels, and a gradual decrease in children's viewing to the main commercial PSB channels. The proportion of time spent viewing BBC One and BBC Two

[135] Consolidated viewing includes live and time-shifted viewing within seven days of the original broadcast, through the TV set.
[136] ITV, Channel 4 and Channel 5, including their HD variants where applicable.

combined remained fairly stable from 2011 (14%) to 2016 (13%). The remaining 11% in 2016 was to the BBC portfolio channels.

Sixty-four per cent of 4-15s' total viewing took place in adult airtime[137] (Figure A1.8). However, this figure varies significantly by age. Seventy-nine per cent of viewing among older children (aged 10-15) was in adult airtime, while it made up just over half (53%) of 4-9 year-olds' viewing time.

The remaining 36% of children's total viewing that took place in children's airtime[138] was mostly attributed to commercial airtime[139] (26%) while 10% was spent in non-commercial children's airtime. Younger children, aged 4-9, spent a higher proportion of their total weekly viewing in children's airtime (47%) than 10-15 year-olds (21% of their viewing time).

Drilling down further into total viewing just in children's airtime, figure A1.7 shows that the majority (72%) of this viewing among children aged 4-15 was to commercial children's airtime, almost the same as in 2015 (73%). By channel, most viewing time was spent on dedicated commercial children's channels (69%). The proportion of viewing time to children's programming slots on the main commercial PSB channels (ITV, Channel 4 and Channel 5) has stayed steady over the last six years, at between 3% and 4%. BBC One and BBC Two did not have dedicated children's programme slots between 2013 and 2016, and this is reflected in figure A1.7. Children's viewing to the BBC's dedicated children's channels, CBBC and CBeebies, has decreased by 4pp since 2011, to 27%.

With whom are children watching?

When watching TV at the time of broadcast, 25% of children watched alone. Figure A1.9 shows that this varied only slightly between 10-15 year-olds (27%) and 4-9 year-olds (23%).

Across the day, children watched TV with other people (children and/or adults) most between 7pm and 11pm. Between 82 and 84% of viewing by children was with other people during this time. The presence of adults watching TV with children remained high after 9pm, but, of the very small number of children watching later in the night, the proportion of children watching alone increased notably after 12am (23%) to 58% between 5am and 6am.

Top programmes among children

Figure A1.11 looks at the top-performing programmes among all children in 2016. Fourteen of the 20 most-watched programmes by children aged 4-15 were on BBC One, with one on Channel 4 and the remainder on ITV. Virtually all the programmes were in peak family viewing time, and many of them were in the Christmas / New Year period. Entertainment programmes accounted for 11 of the 20 most popular programmes, with *Britain's Got Talent* being the most popular programme overall, with 1.6 million children watching, giving it a 68% share of all children watching broadcast TV at that time. There was one children's-genre programme in the top 20, (*We're Going on a Bear Hunt*) on

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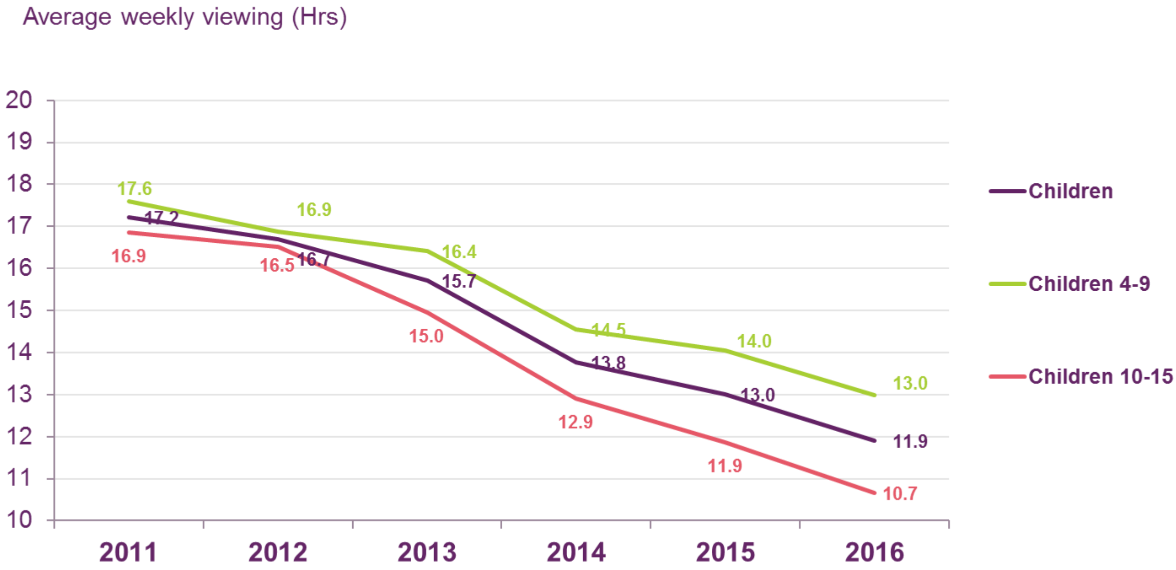
[137] This comprises the main five PSB channels and ITV, Channel 4 and Channel 5 +1 channel services, excluding the slots when children's programmes are shown, combined with all other multi-channel channels except for the dedicated children's channels.
[138] This comprises the children's programme slots on the main five PSB channels and the equivalent slots on ITV +1, Channel 4 +1 and Channel 5 +1, as well as the dedicated multi-channel children's channels.
[139] This comprises children's programme slots on the commercial PSB channels that have them (ITV and Channel 5) and the equivalent slots on ITV +1 and Channel 5 +1, as well as the dedicated commercial multi-channel children's channels.

Channel 4 on Christmas Eve. This achieved 1.5 million viewers on average, a 44% share of all children viewing broadcast TV at that time.

Younger children, aged 4-9, watched a similar range of genres as all children, with even more entertainment programming appearing in the top 20 than for all children (13 of the top 20). *We're Going on a Bear Hunt* moved to the top position for younger children, and *The Lion Guard* on Disney Junior was the only other children's-genre programme to appear (in 13th place) in this list (Figure A1.12).

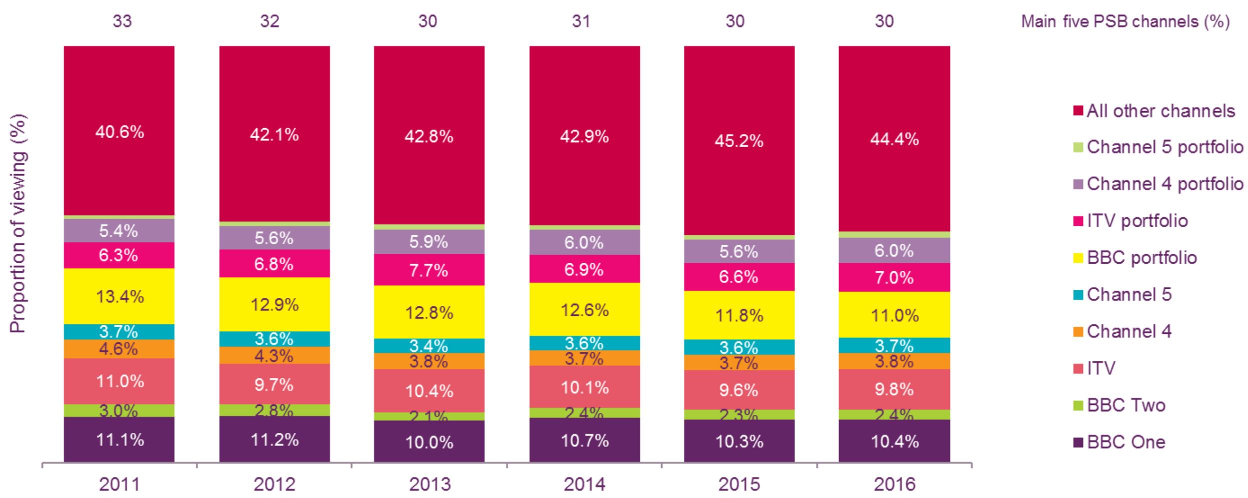
Entertainment was the most popular genre among 10-15 year-olds in 2016 (Figure A1.13). More sport programmes appear for this age group than for all children, with three football matches from the European Championships featuring in the top 20.

Figure A1.1: Average hours of weekly viewing, by age



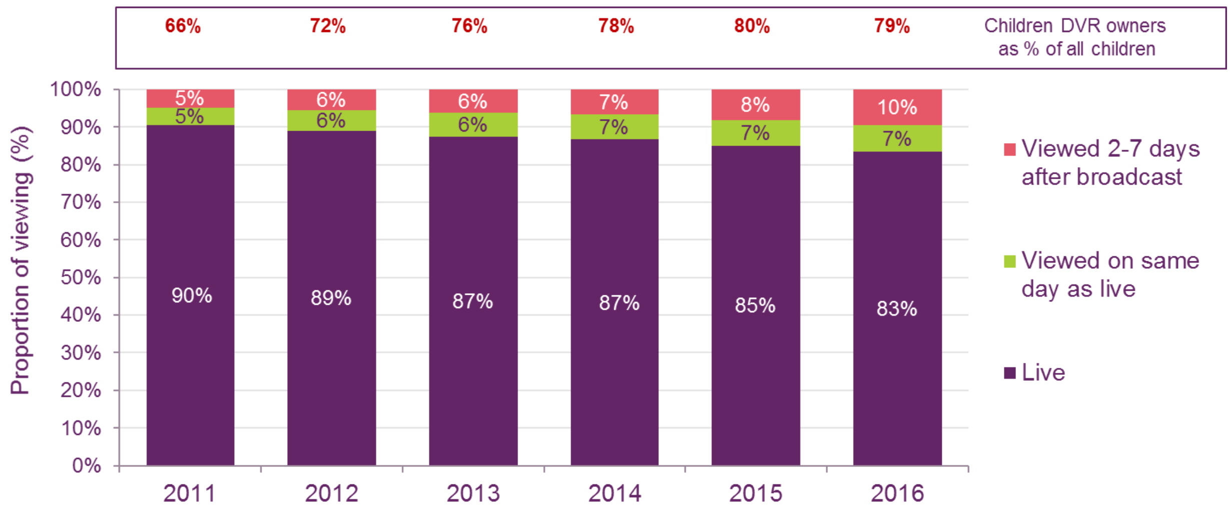
Source: BARB, 2011-2016. Total TV consolidated.

Figure A1.2: Channel share of viewing, all children (4-15)



Source: BARB, 2011-2016, all children 4-15. Network, consolidated.

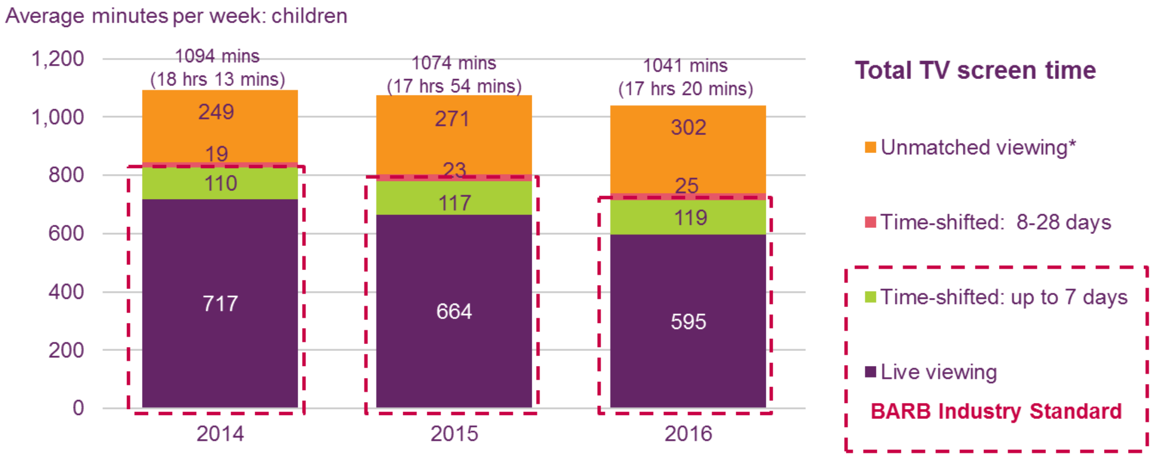
Figure A1.3: Live versus time-shifted TV viewing, all children (4-15)



Source: BARB, 2011-2016, all children 4-15. Based on total minutes per child each year.

Values may not sum up to 100% due to rounding.

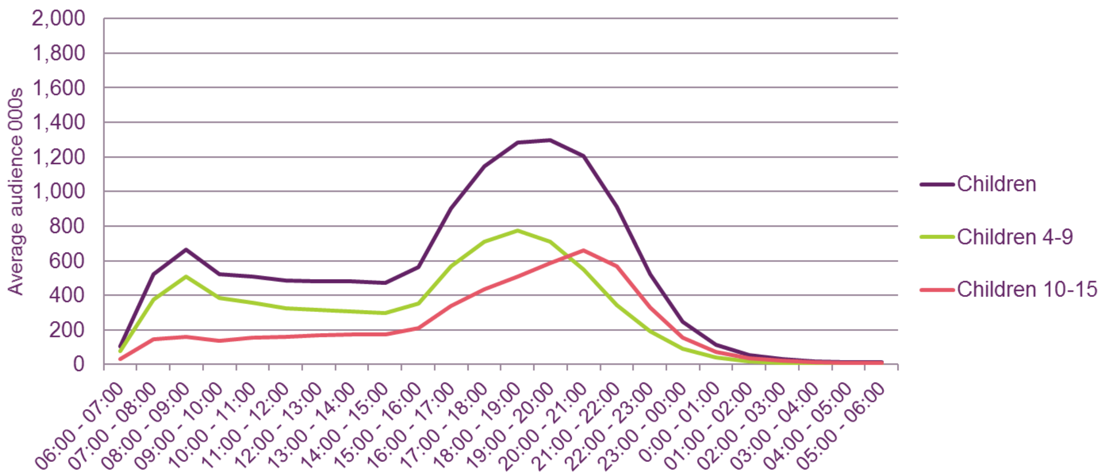
Figure A1.4: Average weekly minutes of total TV screen time for children



Source: BARB, children 4-15, network, total TV. Average minutes of viewing per week, per child.

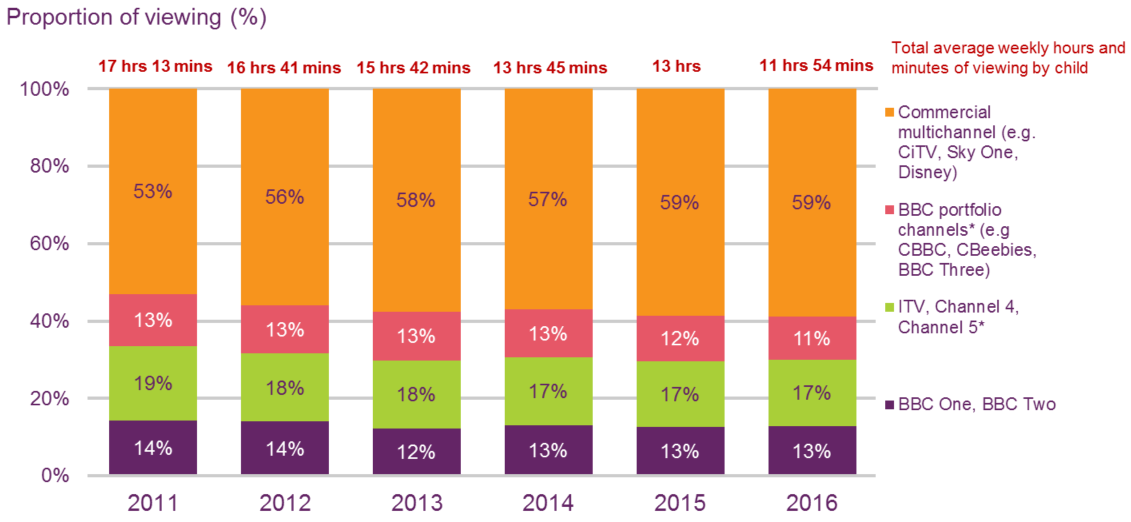
**Note: Unmatched viewing = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing to DVDs/box sets/archives, SVoD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation of EPG guides where there is no in-picture linear content. Digital radio stations are excluded (reported by RAJAR). Unmatched viewing has been reported by BARB since July 2013. Dotted line marks difference between BARB industry standard data and the 8-28-day time-shifted and unmatched viewing.*

Figure A1.5: Average 2016 audience, by day part and age: total TV



Source: BARB, 2016. Live viewing only.

Figure A1.6: Children's total weekly viewing, by channel type



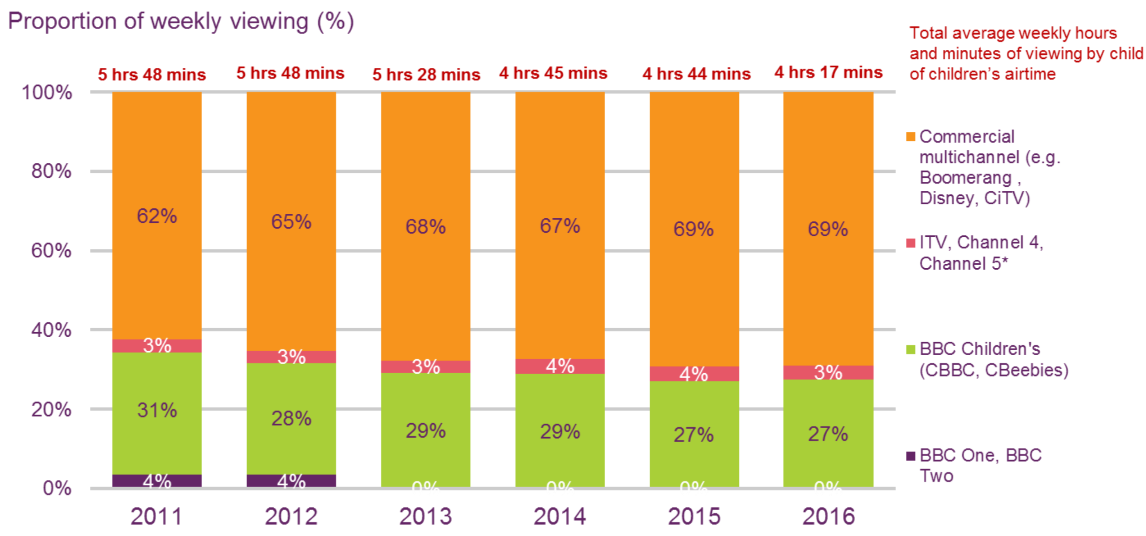
Source: BARB 2011-2016, all children 4-15, consolidated.

**BBC portfolio channels include all BBC channels except BBC One and BBC Two.*

**ITV, Channel 4 and Channel 5 include HD variants. +1 viewing is included in 'commercial multichannel'.*

Values may not sum up to 100% due to rounding.

Figure A1.7: Children's weekly viewing of children's airtime, by channel type



Source: BARB, 2011-2016, all children 4-15, consolidated.

**ITV, Channel 4 and Channel 5 children's slots include HD variants. +1 viewing is included in 'commercial multichannel'.*

'Commercial multichannel' consists of all dedicated commercial multi-channel children's channels and the children's slots on the main PSB channels' +1 services.

Figure A1.8: Demographic differences

Weekly Viewing Summary	Children	4-9	10-15
Total hours of viewing	11.9	13.0	10.7
Total hours of viewing in comm. airtime	9.1	9.8	8.2
Total hours of viewing in adult airtime	7.6	6.9	8.5
Total hours of viewing in comm. adult airtime	6.0	5.4	6.6
Total hours of viewing in children's airtime	4.3	6.1	2.2
Total hours of viewing in comm. children's air.	3.1	4.4	1.6
% total time spent in commercial airtime	76%	75%	77%
% total time spent in adult airtime	64%	53%	79%
% total time spent in comm. adult air.	50%	42%	62%
% total time spent in children's airtime	36%	47%	21%
% total time spent in comm. children's airtime.	26%	34%	15%

Source: BARB, 2016, consolidated.

***Commercial airtime** consists of commercial PSB channels (ITV, Channel 4 and Channel 5), including HD variants and +1 channels, and commercial multi-channel channels.*

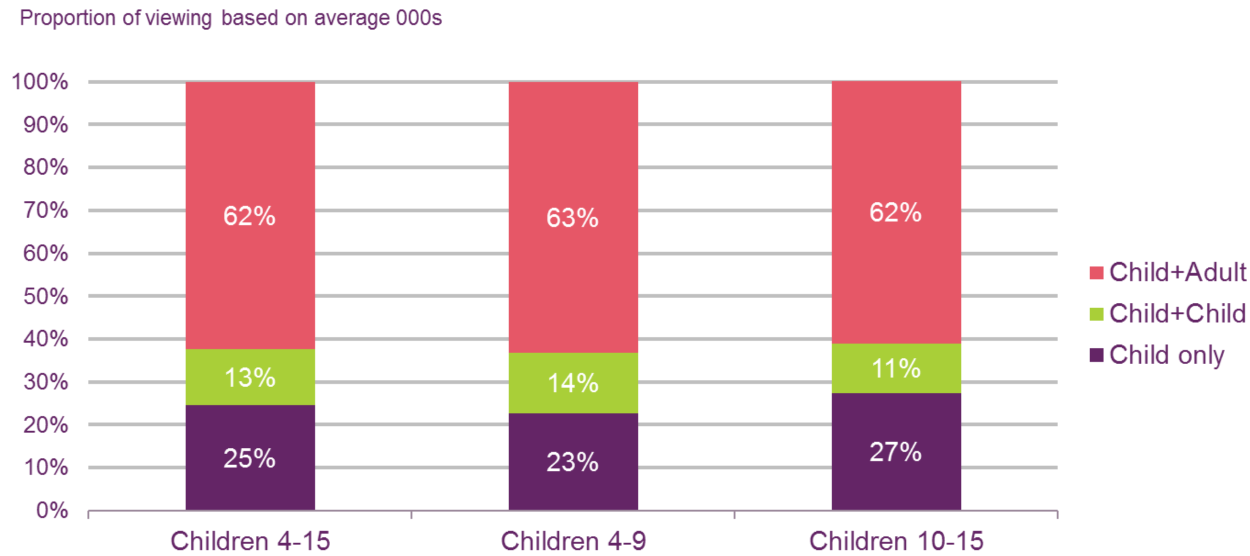
***Adult airtime** consists of the main five PSB channels (including HD) and ITV, Channel 4 and Channel 5 +1 channels, excluding the slots when children's programmes are shown, combined with all other multi-channel channels except for the dedicated children's channels.*

***Commercial adult airtime** consists of commercial PSB channels (ITV, Channel 4 and Channel 5), including HD and +1 variants but excluding the slots when children's programmes are shown, combined with all other multi-channel channels except for the dedicated children's channels.*

***Children's airtime** consists of the children's programme slots on the main five PSB channels and the equivalent slots on ITV +1, Channel 4 +1 and Channel 5 +1, as well as the dedicated multi-channel children's channels.*

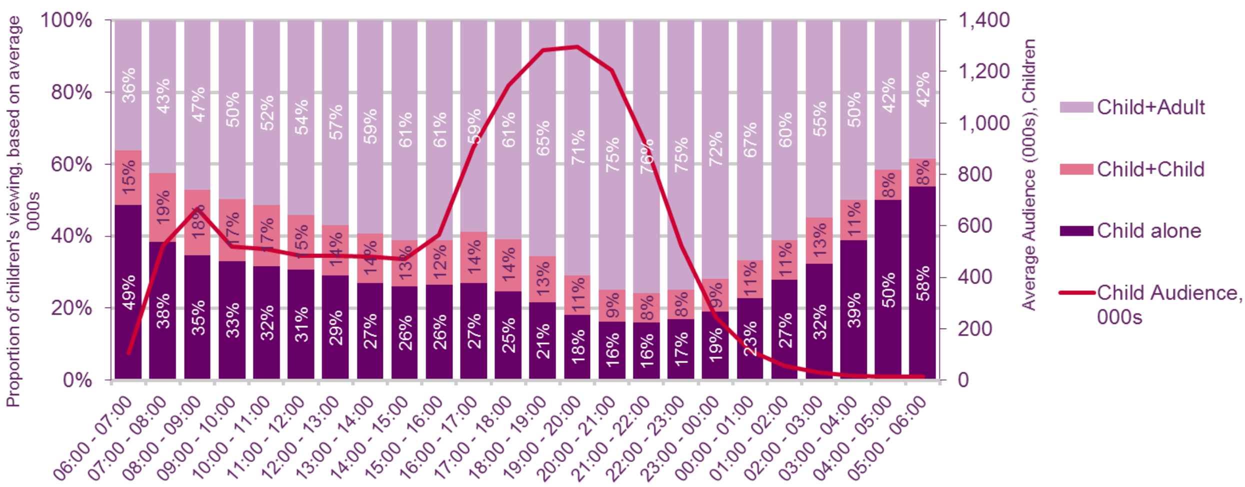
***Commercial children's airtime** consists of children's programme slots on the commercial PSB channels (ITV, Channel 4 and Channel 5) and the equivalent slots on ITV +1, Channel 4 +1 and Channel 5 +1, as well as the dedicated commercial multi-channel children's channels.*

Figure A1.9: Co-viewing across total TV



Source: BARB, all children 4-15, 2016. Based on live viewing at the time of broadcast. Values may not sum up to 100% due to rounding.

Figure A1.10: Co-viewing across the day: all TV viewing



Source: BARB, all children 4-15, 2016. Based on live viewing at the time of broadcast. Values may not sum up to 100% due to rounding.

Figure A1.11: Top 20 programmes in 2016 among all children aged 4-15

	Title	Channel	Date	Start time	End time	Duration	Genre	000s	Rating (%)	Share (%)
1	BRITAIN'S GOT TALENT	ITV	16/04/2016	20:02:20	21:20:46	01:18:26	Entertainment	1638	18.4	68.3
2	WE'RE GOING ON A BEAR HUNT	CH4	24/12/2016	19:29:13	19:53:39	00:24:26	Children's	1539	17.2	43.7
3	THE GREAT BRITISH BAKE OFF	BBC1	26/10/2016	19:59:13	20:58:49	00:59:36	Hobbies/Leisure	1331	14.9	58.3
4	NEW YEAR'S EVE FIREWORKS	BBC1	31/12/2016	23:59:01	24:15:01	00:16:00	Entertainment	1270	14.2	65.2
5	BILLIONAIRE BOY	BBC1	01/01/2016	19:01:05	20:01:05	01:00:00	Drama:Single Plays	1241	14.0	40.5
6	I'M A CELEBRITY - GET ME OUT OF HERE!	ITV	13/11/2016	21:02:05	22:46:05	01:44:00	Entertainment	1205	13.5	70.9
7	THE X FACTOR	ITV	03/09/2016	20:16:10	21:14:57	00:58:47	Entertainment	1081	12.1	55.5
8	ANT & DEC'S SATURDAY NIGHT TAKEAWAY	ITV	20/02/2016	19:00:00	20:30:10	01:30:10	Entertainment	1077	12.1	41.6
9	STRICTLY COME DANCING: THE FINAL	BBC1	17/12/2016	18:39:55	20:54:15	02:14:20	Entertainment	1064	11.9	46.8
10	STRICTLY COME DANCING	BBC1	19/11/2016	18:58:00	20:10:21	01:12:21	Entertainment	987	11.1	39.4
11	THE GREAT CHRISTMAS BAKE OFF	BBC1	25/12/2016	16:44:01	17:42:58	00:58:57	Entertainment	934	10.5	35.3
12	DOCTOR WHO	BBC1	25/12/2016	17:44:12	18:44:36	01:00:24	Drama:Series/Serials	926	10.4	31.5
13	PLANET EARTH II	BBC1	13/11/2016	20:00:39	20:58:50	00:58:11	Documentaries	922	10.3	40.7
14	FILM: WRECK-IT RALPH (2012)	BBC1	01/01/2016	16:33:42	18:05:14	01:31:32	Films:Cinema	916	10.3	38.8
15	NINJA WARRIOR	ITV	16/01/2016	18:59:08	19:58:25	00:59:17	Entertainment	880	9.9	39.7
16	STRICTLY COME DANCING LAUNCH SHOW	BBC1	03/09/2016	18:51:57	20:15:49	01:23:52	Entertainment	877	9.8	42.9
17	STRICTLY COME DANCING CHRISTMAS SPECIAL	BBC1	25/12/2016	18:46:42	19:58:33	01:11:51	Entertainment	876	9.8	30.7
18	EASTENDERS	BBC1	01/01/2016	20:01:47	20:33:13	00:31:26	Drama:Soaps	872	9.8	39.1
19	EURO 2016: POR V FRA	BBC1	10/07/2016	20:01:03	22:32:20	02:31:17	Sport	869	9.7	51.7
20	FILM: FROZEN (2013)	BBC1	25/12/2016	15:10:21	16:42:08	01:31:47	Films:Cinema	832	9.3	35.5

Source: BARB, 2016, consolidated. Based on the best-performing programme episode (000s). All channels include viewing to HD variants but exclude +1s.

Figure A1.12: Top 20 programmes in 2016 among all children aged 4-9

	Title	Channel	Date	Start time	End time	Duration	Genre	000s	Rating (%)	Share (%)
1	WE'RE GOING ON A BEAR HUNT	CH4	24/12/2016	19:29:13	19:53:39	00:24:26	Children's	1177	24.8	57.8
2	BRITAIN'S GOT TALENT	ITV	23/04/2016	20:02:30	21:19:56	01:17:26	Entertainment	840	17.7	67.5
3	ANT & DEC'S SATURDAY NIGHT TAKEAWAY	ITV	02/04/2016	19:00:00	20:32:30	01:32:30	Entertainment	592	12.5	44.5
4	FILM: WRECK-IT RALPH (2012)	BBC1	01/01/2016	16:33:42	18:05:14	01:31:32	Films:Cinema	587	12.4	39.9
5	NINJA WARRIOR	ITV	16/01/2016	18:59:08	19:58:25	00:59:17	Entertainment	585	12.4	43.7
6	STRICTLY COME DANCING	BBC1	19/11/2016	18:58:00	20:10:21	01:12:21	Entertainment	574	12.1	42.5
7	THE X FACTOR	ITV	03/09/2016	20:16:10	21:14:57	00:58:47	Entertainment	557	11.7	56.5
8	STRICTLY COME DANCING: THE FINAL	BBC1	17/12/2016	18:39:55	20:54:15	02:14:20	Entertainment	546	11.5	45.6
9	THE GREAT BRITISH BAKE OFF	BBC1	26/10/2016	19:59:13	20:58:49	00:59:36	Hobbies/Leisure	532	11.2	52.5
10	FILM: FROZEN (2013)	BBC1	25/12/2016	15:10:21	16:42:08	01:31:47	Films:Cinema	532	11.2	40.2
11	BILLIONAIRE BOY	BBC1	01/01/2016	19:01:05	20:01:05	01:00:00	Drama:Single Plays	526	11.1	32.6
12	THE GREAT CHRISTMAS BAKE OFF	BBC1	25/12/2016	16:44:01	17:42:58	00:58:57	Entertainment	516	10.9	36.3
13	THE LION GUARD	Disney Junior	08/02/2016	17:31:42	18:14:07	00:42:25	Children's	515	10.9	32.0
14	STRICTLY COME DANCING LAUNCH SHOW	BBC1	03/09/2016	18:51:57	20:15:49	01:23:52	Entertainment	515	10.9	42.9
15	NEW YEAR'S EVE FIREWORKS	BBC1	31/12/2016	23:59:01	00:15:01	00:16:00	Entertainment	493	10.4	64.6
16	REVOLTING RHYMES	BBC1	26/12/2016	18:30:03	18:58:11	00:28:08	Entertainment	463	9.8	36.3
17	CHILDREN IN NEED	BBC1	18/11/2016	19:29:04	21:59:05	02:30:01	Entertainment	450	9.5	43.2
18	PLANET EARTH II	BBC1	13/11/2016	20:00:39	20:58:50	00:58:11	Documentaries	441	9.3	42.5
19	THE VOICE UK	BBC1	23/01/2016	19:44:45	21:02:09	01:17:24	Entertainment	417	8.8	37.9
20	STRICTLY COME DANCING CHRISTMAS SPECIAL	BBC1	25/12/2016	18:46:42	19:58:33	01:11:51	Entertainment	411	8.7	27.2

Source: BARB, 2016, consolidated. Based on the best-performing programme episode (000s). All channels include viewing to HD variants but exclude +1s.

Figure A1.13: Top 20 programmes in 2016 among all children aged 10-15

	Title	Channel	Date	Start time	End time	Duration	Genre	000s	Rating (%)	Share (%)
1	I'M A CELEBRITY - GET ME OUT OF HERE!	ITV	13/11/2016	21:02:05	22:46:05	01:44:00	Entertainment	901	21.5	76.2
2	BRITAIN'S GOT TALENT	ITV	16/04/2016	20:02:20	21:20:46	01:18:26	Entertainment	838	20.2	69.6
3	THE GREAT BRITISH BAKE OFF	BBC1	26/10/2016	19:59:13	20:58:49	00:59:36	Hobbies/Leisure	799	19.1	63.0
4	NEW YEAR'S EVE FIREWORKS	BBC1	31/12/2016	23:59:01	24:15:01	00:16:00	Entertainment	777	18.5	65.6
5	BILLIONAIRE BOY	BBC1	01/01/2016	19:01:05	20:01:05	01:00:00	Drama:Single Plays	714	17.2	49.2
6	THE X FACTOR	ITV	19/11/2016	20:03:30	21:19:26	01:15:56	Entertainment	587	14.0	46.5
7	EURO 2016: POR V FRA	BBC1	10/07/2016	20:01:03	22:32:20	02:31:17	Sport	562	13.4	51.9
8	EASTENDERS	BBC1	01/01/2016	20:01:47	20:33:13	00:31:26	Drama:Soaps	543	13.0	47.9
9	DOCTOR WHO	BBC1	25/12/2016	17:44:12	18:44:36	01:00:24	Drama:Series/Serials	540	12.9	38.1
10	ANT & DEC'S SATURDAY NIGHT TAKEAWAY	ITV	20/02/2016	19:00:00	20:30:10	01:30:10	Entertainment	529	12.7	43.5
11	STRICTLY COME DANCING: THE FINAL	BBC1	17/12/2016	18:39:55	20:54:15	02:14:20	Entertainment	518	12.3	48.2
12	EURO 2016: GER V FRA	BBC1	07/07/2016	20:00:57	21:53:20	01:52:23	Sport	504	12.0	55.3
13	THE X FACTOR RESULTS	ITV	09/10/2016	19:59:45	20:58:25	00:58:40	Entertainment	485	11.6	52.8
14	PLANET EARTH II	BBC1	13/11/2016	20:00:39	20:58:50	00:58:11	Documentaries	481	11.5	39.3
15	STRICTLY COME DANCING CHRISTMAS SPECIAL	BBC1	25/12/2016	18:46:42	19:58:33	01:11:51	Entertainment	464	11.1	34.7
16	SHERLOCK	BBC1	01/01/2016	21:03:39	22:32:58	01:29:19	Drama:Series/Serials	434	10.4	42.2
17	EURO 2016: SVK V ENG	ITV	20/06/2016	19:14:00	22:25:52	03:11:52	Sport	431	10.3	47.5
18	STRICTLY COME DANCING	BBC1	05/11/2016	18:55:25	20:18:08	01:22:43	Entertainment	424	10.1	44.0
19	THE GREAT CHRISTMAS BAKE OFF	BBC1	25/12/2016	16:44:01	17:42:58	00:58:57	Entertainment	419	10.0	34.1
20	ROBBIE ROCKS BIG BEN LIVE	BBC1	31/12/2016	24:15:01	24:55:56	00:40:55	Music	409	9.8	53.1

Source: BARB, 2016, consolidated. Based on the best-performing programme episode (000s). All channels include viewing to HD variants but exclude +1s.

Figure A1.14: Top 20 programmes after 9pm in 2016 among all children aged 4-15

	Title	Channel	Date	Start time	End time	Duration	Genre	000s	Rating (%)	Share (%)
1	NEW YEAR'S EVE FIREWORKS	BBC1	31/12/2016	23:59:01	24:15:01	00:16:00	Entertainment	1270	14.2	65.2
2	I'M A CELEBRITY - GET ME OUT OF HERE!	ITV	13/11/2016	21:02:05	22:46:05	01:44:00	Entertainment	1205	13.5	70.9
3	EURO 2016: POST MATCH	BBC1	01/07/2016	21:49:51	22:08:59	00:19:08	Sport	681	7.6	49.7
4	STRICTLY COME DANCING	BBC1	23/09/2016	20:59:35	21:58:36	00:59:01	Entertainment	670	7.5	40.1
5	ROBBIE ROCKS BIG BEN LIVE	BBC1	31/12/2016	00:15:01	00:55:56	00:40:55	Music	633	7.1	51.2
6	EASTENDERS	BBC1	25/12/2016	21:29:02	22:30:01	01:00:59	Drama:Soaps	626	7.0	34.3
7	BRITAIN'S GOT TALENT	ITV	26/05/2016	21:33:15	22:00:49	00:27:34	Entertainment	559	6.3	45.0
8	SHERLOCK	BBC1	01/01/2016	21:03:39	22:32:58	01:29:19	Drama:Series/Serials	547	6.2	32.2
9	MICHAEL MCINTYRE'S BIG SHOW	BBC1	17/12/2016	20:56:06	21:54:41	00:58:35	Entertainment	535	6.0	33.0
10	CORONATION STREET	ITV	26/05/2016	21:04:11	21:30:45	00:26:34	Drama:Soaps	534	6.0	40.2
11	MRS BROWN'S BOYS CHRISTMAS SPECIAL	BBC1	25/12/2016	22:31:05	23:00:56	00:29:51	Entertainment	531	5.9	35.6
12	THE APPRENTICE	BBC1	27/10/2016	20:59:40	21:58:30	00:58:50	Documentaries	481	5.4	38.1
13	FILM: HARRY POTTER AND THE DEATHLY HALLO	ITV	31/12/2016	21:04:30	23:24:45	02:20:15	Films:Cinema	393	4.4	25.4
14	BENIDORM	ITV	15/02/2016	21:00:10	21:59:16	00:59:06	Entertainment	391	4.4	25.4
15	FILM: HARRY POTTER AND THE HALF-BLOOD PR	ITV	29/12/2016	21:01:28	22:58:55	01:57:27	Films:Cinema	388	4.3	27.4
16	THE APPRENTICE: THE FINAL	BBC1	18/12/2016	21:08:24	22:08:39	01:00:15	Documentaries	386	4.3	29.9
17	CASUALTY	BBC1	23/01/2016	21:04:06	21:53:08	00:49:02	Drama:Series/Serials	379	4.3	25.6
18	OUTNUMBERED	BBC1	26/12/2016	22:01:36	22:40:54	00:39:18	Entertainment	378	4.2	27.1
19	PLAY TO THE WHISTLE (SERIES 2)	ITV	23/04/2016	21:24:55	22:03:57	00:39:02	Entertainment	345	3.9	23.4
20	NEWZOIDS	ITV	10/09/2016	21:04:02	21:30:50	00:26:48	Entertainment	343	3.8	24.6

Source: BARB, 2016, consolidated. Based on the best-performing programme episode (000s). All channels include viewing to HD variants but exclude +1s.

Glossary

Adult airtime – this comprises the main five PSB channels (including HD) and ITV, Channel 4 and Channel 5 +1 channels, excluding the slots when children's programmes are shown, combined with all other multi-channel channels except for the dedicated children's channels.

Average audience 000s – this is the average audience for the duration of the programme. For each minute of the programme, the viewing 000s are counted and then averaged over the duration of the programme minutes.

Children's airtime – this comprises the children's programme slots on the main five PSB channels and the equivalent slots on ITV +1, Channel 4 +1 and Channel 5 +1, as well as the dedicated multi-channel children's channels.

Commercial adult airtime – this comprises the commercial PSB channels (ITV, Channel 4 and Channel 5), including HD and +1 variants but excluding the slots when children's programmes are shown, combined with all other multi-channel channels except for the dedicated children's channels.

Commercial children's airtime – this comprises the children's programme slots on the commercial PSB channels (ITV, Channel 4 and Channel 5) and the equivalent slots on ITV +1, Channel 4 +1 and Channel 5 +1, as well as the dedicated commercial children's channels.

DVRs – digital video recorders.

Rating % (also known as TVR) – this measures the popularity of a programme, daypart, channel, commercial break or advert by comparing its audience to the population as a whole (whether they watched TV or not). One TVR is equivalent to 1% of a target audience.

Share % – this is the percentage of the total TV viewing audience at that specific time.

Time-shifted viewing – this is defined in BARB analysis as viewing of programmes, on TV sets, recorded and subsequently played back within seven days, as well as viewing after pausing or rewinding live TV. It also includes viewing to catch-up TV services viewed through a TV set, where the content has been broadcast in the previous seven days.

A2. Websites visited by children: comScore analysis

Introduction

This annex provides a table listing 'web properties' accessed by children aged 6-14, in order of popularity, during May 2017. We have used the comScore MMX service to measure internet use on laptop and desktop computers. These data do not include use of the internet on other devices, such as a smartphone or tablet computer, as mobile device use by under-18s is not measured by comScore.

Highlights

As we can only measure children's online use on desktop and laptop computers, this analysis provides only a partial picture of children's activity, given the increased use of portable devices to go online. Nevertheless, the table provides some useful insight into what children are doing online, providing valuable context to our children's media literacy report.

Search sites

As the table demonstrates, search sites are among the most popular web entities used by children. In May 2017, Google sites ranked highest in the data. These sites had a unique audience of nearly 3.7 million, with each visitor spending an average of 3 hours 14 minutes on them over the course of the month. YouTube and Google Search were the most popular brands within the Google sites overall, with children spending an average of 4 hours 36 minutes hours on YouTube during May 2017. Microsoft sites ranked second, with Yahoo sites at fifth place in the table. As noted last year, the popularity of these search sites may in part be explained by the fact that they are used by many as home pages for their web browsers.

Online gaming and e-commerce

Online gaming sites such as Roblox, Valve Corporation (which owns the popular PC gaming platform Steam) and EA Games are among the top 15 sites most visited by children. The Roblox site, which hosts a popular children's multi-player online game of the same name, and can also be used as a social gaming platform where players can chat with each other, was the third most-visited site by children in May 2017.

The data also show relatively high numbers of unique visitors to online retailers such as Amazon and eBay (which this year are ranked sixth and ninth in the table respectively), suggesting that children are browsing, and possibly also purchasing, online.

Social media

Social media websites continue to attract large numbers of visitors, with Facebook at seventh place and Twitter at 24th place in the unique audience list.

While Facebook had a larger number of unique visitors than Twitter in May 2017, on average children spent less time on it (26.0 minutes) than they did on Twitter (33.2 minutes). Reddit, which has active online forums and allows anonymous, private messages between users, ranked 23rd with 306,000 unique visitors. On average visitors spent 9.2 minutes on the site.

Online content

This year Netflix was 27th in the top 50 sites. The number of unique visitors to Netflix in May 2017 was 312,000.

The data also show that a large number of children visit websites that provide educational support. Web properties such as National Geographic and MyMaths Ltd held 19th and 23rd place respectively, while BBC Learning (which sits within the BBC sites) attracted a unique audience of 298,000 in May 2017.

Table 1: May 2017, Top 30 web properties accessed by children aged 6-14 from desktop and laptop computers

No.	Web Property	Unique Audience (000s)	Active Reach (%)	Average Daily Visitors (000)	Average minutes per visitor
1	Google Sites	3,678	63.2	792	193.6
2	Microsoft Sites	3,556	61.1	843	50.7
3	ROBLOX.COM	2,796	48.0	747	233.2
4	BBC Sites	1,827	31.4	201	20.9
5	Yahoo Sites	1,307	22.5	183	19.9
6	Amazon Sites	1,240	21.3	90	23.9
7	Facebook	1,139	19.6	116	26.0
8	Valve Corporation	1,112	19.1	293	33.2
9	eBay	877	15.1	61	36.1
10	Dropbox Sites	707	12.2	214	0.3
11	EA Games - Media Network	637	10.9	167	7.6
12	Spotify	633	10.9	177	0.7
13	Apple Inc.	600	10.3	35	2.1
14	Wikimedia Foundation Sites	487	8.4	31	4.0
15	MOVIESTARPLANET.CO.UK	468	8.0	84	92.5
16	Sky Sites	410	7.0	31	7.0
17	CBS Interactive	386	6.6	22	8.1
18	COOLMATH-GAMES.COM	374	6.4	19	9.8
19	National Geographic Sites	363	6.2	33	15.8
20	Fandom Powered By Wikia	354	6.1	31	13.2
21	Ask Network	352	6.0	27	5.9
22	Viacom Digital	352	6.0	24	11.7
23	MyMaths Ltd	345	5.9	25	19.0
24	Twitter	338	5.8	31	33.2
25	Virgin Media	334	5.7	29	4.9
26	Adobe Sites	332	5.7	15	3.6
27	Netflix Inc.	312	5.4	34	23.0

28	Home Retail Group	308	5.3	18	13.0
29	Reddit	306	5.3	30	9.2
30	Mail Online / Daily Mail	297	5.1	22	8.2

Methodology

comScore's Unified Digital Measurement methodology combines panel and census measurement techniques in its approach to digital audience measurement. This method uses the comScore global measurement panel to determine audience reach and demographics. In addition to directly measured census-level activity at publishers' digital content assets (i.e. websites, videos, apps), which accurately accounts for total media consumption, these datasets are brought together to provide a more accurate view of audiences and their activity, in a way that is not affected by variables such as cookie deletion, blocking and rejection.

The table in this annex lists the top 30 *Media Titles* and *Properties* ordered by unique audience and active reach among the 6-14 year-old audience. The *Media Titles* are subsidiary entities of the internet *Properties* listed in comScore's *All Properties* category, which collects data from all available properties measured by comScore without the default screening applied to the Top 1000 category (which excludes adult sites by default). The table also includes some *Property* entities which do not have any subsidiary *Media Titles,* where their unique audience and active reach would place them within the top-30 ranking. Ofcom considers that this unique approach best reflects internet users' consumption of online content without over-aggregating websites into their parent entities, nor duplicating websites which host several *Channels* or *Sub-channels* of content.

A *Media Title* is an editorially- and brand-consistent collection of content in the digital landscape that provides the marketplace with a view of online user behaviour. This may represent a domain, a group of domains, an online service or a computer application. In contrast, a *Property* is the parent entity and can represent a full domain (i.e. bbc.co.uk), pages (e.g. bbc.co.uk/sport), applications or online services under common ownership or majority ownership, for a single legal entity.

The table is ranked by unique audience and active reach. 'Unique audience' is defined as the total number of unique persons who visited a website or used an application at least once in a given month. Persons visiting the same website more than once in the month are therefore counted only once in this measure. The 'active audience' is the total number of people who visited any website or used any application at least once in a given month. The active reach of a website is therefore the proportion of the unique audience who visit that website at least once during the month.

Browsing data used for this report is collected with parental consent, and is based on the predicted likelihood that a user visiting a property is a child. comScore and Ofcom are not responsible for the listed publishers' compliance with any applicable laws.

Please note: all rankings included in this report are based on Ofcom's ranking approach, outlined above. While all the data are based on reportable entities in comScore MMX, Ofcom's unique treatment of the various media entities means that the rankings will not directly align with comScore's own web property or media entity rankings.

Additional web entity definitions
* Not all visitors to a webpage of this domain are attributed to this entity. The domain contains content belonging to another entity, and as such any visitors to this content are attributed to the other entity.

† Property with no 'child' *Media Titles*.

For more information on the data methodology and measurement contained in this annex, please visit www.comscore.com