Children and parents media use and attitudes: annex 1

Children's research annex

RESEARCH REPORT

Publication Date: 29 January 2019

Contents

Annex

A1. Introduction to the Research Annex

This research annex provides the detailed data, charts and narrative behind the key findings set out in the Children and Parents: Media Use and Attitudes Report 2018

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[1] aged 5-15 and their parents/carers[2], 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[3]. 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

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

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

[3] Where base sizes allow, analysis by household socio-economic group is conducted for 5-15s by comparing each of the four groups (AB/C1/C2 DE) to the average for 5-15s. Where base sizes are lower for one or more of these four groups the analysis compares those in ABC1 households to those in C2DE households. For 3-4s, socio-economic group analysis compares those in ABC1 households to those in C2DE households.

keep children and young people safe online; and to inform other stakeholder organisations such as Get Safe Online.

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, 2016 and 2017[4]. 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, 2017 and 2018[5]. In April/ May/ June 2018, 1,430 in-home interviews with parents of 5-15s and children aged 8-15 were conducted, along with 630 interviews with parents of children aged 3-4. 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 2014, 1,660 in-home interviews were conducted with parents and children aged 5-15 as well as 731 interviews with parents of children aged 3-4. In March/ April 2011, 1,717 in-home interviews with parents and children aged 5-15 were conducted. In April/ May and September/ October 2009, 2,131 in-home interviews with parents and children aged 5-15 were conducted.

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 630 interviews conducted in-home in April/ May/ June 2018. Findings have been shown for 3-4s wherever possible, with comparisons between 2017 and 2014 for this age group, and 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.

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

[5] Across most of the Figures in the report, findings from the 2010, 2011, 2012, 2013, 2015 and 2016 Media Literacy Trackers have been removed to reduce data overcrowding. In some instances, where it is helpful to show how the data has changed over the most recent three-year period, the data for 2016 have been included.

Changes that were made after 2014

Changes were made to the questions asked of parents and children on the Media Literacy Tracker surveys in 2014 regarding the child's use of media. Before 2014 parents and children were asked 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 of 3-4s and 5-7s, and responses from children aged 12-15. 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.

Significance testing

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[6]. 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 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.

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[6] 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.

Additional research

News survey

At the end of 2017 and in spring 2018, Ofcom conducted a news survey online with 12-15-year-olds, to explore their interest in news generally, in different types of news content, and the types of news sources used.

In total, 500 interviews from November and December 2017 have been combined with 501 interviews from March and April 2018. Please note that the combined 2017/2018 data have been reported as '2018' within this annex. Quotas were set on age, gender, SEG and nation to ensure that the sample was representative of 12-15s who are online in the UK[7].

Cross-Platform Media Tracker

In 2017, Ofcom used its Cross-Platform Media Tracker to explore 12-15 year-olds' attitudes and opinions towards on-demand and online content. Five hundred online interviews were conducted through a research panel between April and December 2017, with an equal number of interviews achieved each month.

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[7] A full discussion of the methodology and findings from the adults' and children's news consumption research is available here: https://www.ofcom.org.uk/__data/assets/pdf_file/0024/116529/news-consumption-2018.pdf

A2. Children's media time

This section details the self-reported[8] 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 similar amounts of time watching TV on a TV set and going online (around 13 hours), with fewer hours spent gaming or using a mobile phone (around 10 hours).
- Children aged 12-15 spend the most time per week[9] online (20 hours 30 minutes on average), followed by using a mobile phone (around 17 hours), with fewer hours spent gaming or watching TV on a TV set (around 13 hours)[10].
- Compared to 2017, the time spent watching television on a TV set in a typical week has decreased for 3-4s, 8-11s and 12-15s. In each case the decrease is by around one hour per week.
- Compared to 2017, children aged 3-4 spend more hours per week online (close to nine hours, up from close to 8 hours in 2017). For no other age group is there a change in time spent online.
- Children aged 12-15 with a mobile phone spend close to 17 hours per week using it, while those aged 8-11 spend around 10 hours doing so; these findings are comparable to those in 2017.
- Children aged 12-15 spend close to 14 hours per week playing games, an increase of around 90 minutes since 2017. Boys in each age group, including 3-4s, spend more hours per week playing games, compared to girls.
- Girls aged 12-15 spend more time in a typical week using their mobile phone and more time watching television on a TV set, compared to boys.

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[8] 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.

[9] 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.

[10] There will be a degree of overlap between these estimates, as discussed later in this section.

- Compared to the average, children aged 5-15 in DE households spend more time going online while those in AB households spend less time playing games and watching TV on a TV set.
- Children aged 3-4 in C2DE households spend more time going online, playing games and watching TV on a TV set, compared to those in ABC1 households.

Media consumption

Children aged 3-4 and 5-15 spend less time than in 2017 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 gaming devices (such as games players/ consoles, mobiles, tablets etc.) watching television on a TV set[11] and using their mobile phone[12], both on a typical school day and on a typical weekend day[13]. Parents of children aged 3-4, whose child uses each of these media, were asked about their use on a typical weekday[14] 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 (14 hours 24 minutes) than they do watching television on a TV set (13 hours 6 minutes) or playing games (10 hours 54 minutes).

In 2018, 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 hours spent gaming or using a mobile phone. Children aged 12-15 spend the largest proportion of their media time online; this is followed by time spent using a mobile phone. They spend the lowest proportion of their media time either gaming or watching TV on a TV set.

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[11] Since 2015, unlike in previous years, parents and children have been asked to focus on time spent watching TV on a TV set (including content as it is broadcast and on demand), as opposed to across any type of device used to watch television content

[12] 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).

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

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

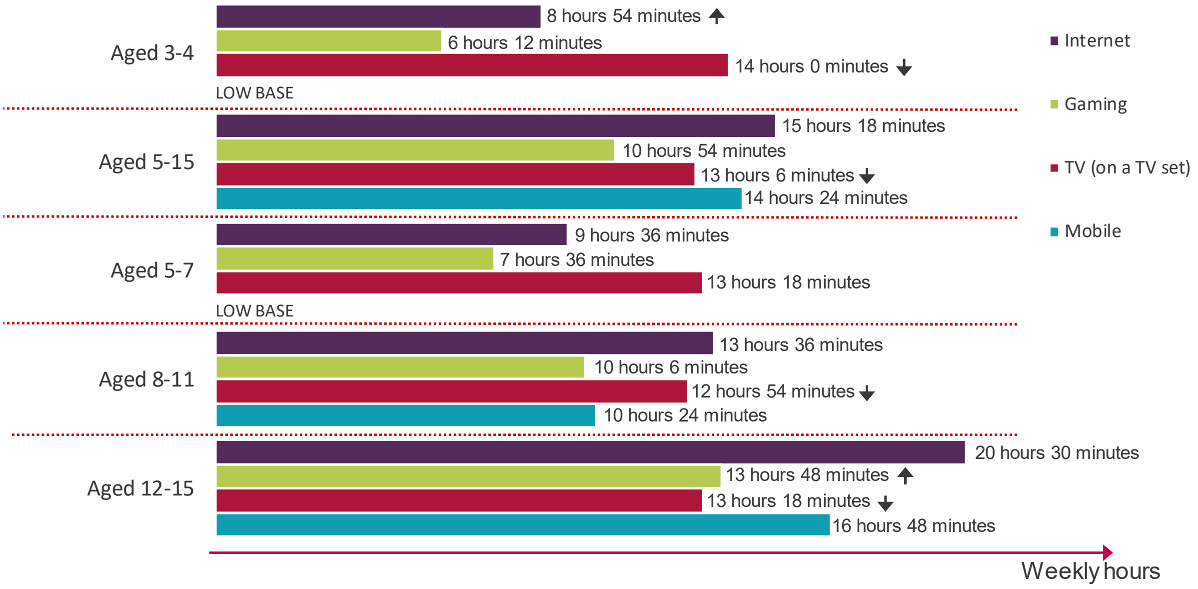
Children in every age group, except 5-7s, spend fewer hours per week watching television on a TV set than in 2017. These decreases are shown, by the age of the child, at Figure 6**.**

Children aged 3-4 are more likely to spend more hours per week using the internet in 2018 compared to 2017 (shown at Figure 3). Among children aged 5-15, however, there has been no change in estimated hours using the internet.

Compared to last year, time spent gaming is unchanged for 3-4s, 5-7 and 8-11s. Among 12-15s, the estimated time spent on gaming has increased by around 90 mins (shown at Figure 4).

Later in this report (Section A10), 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: 2018



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 2017 and 2018.

On average, children aged 5-15 spend around one hour 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, but a lower estimate for watching television on a weekend day. In fact, weekday /school day estimates for time spent watching television on a TV set are higher for 3-4s than for any other age group of children, although, as mentioned in the earlier footnote, this is probably because 3-4s are not yet at school and are therefore more available to consume media.

Parents of 5-7s give a higher estimate than parents of 3-4s of the time their child spends per weekend day going online and playing games, but they give similar or matching estimates for the time spent 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 consistently higher than those 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 on average around 20 minutes more time going online, playing games or watching television on a TV set on a weekend day than on a weekday. Children aged 5-7 spend around 45 minutes more on average using each type of media on a weekend day than on a school day, while 8-11s and 12-15s spend about an hour more on average 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: 2018

	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 12 minutes	0 hours 48 minutes	1 hour 54 minutes	LOW BASE
Weekend day	1 hour 30 minutes	1 hour 6 minutes	2 hours 18 minutes	LOW BASE
Aged 5-15				
School day	1 hour 54 minutes	1 hour 18 minutes	1 hour 36 minutes	1 hour 48 minutes
Weekend day	2 hours 48 minutes	2 hours 12 minutes	2 hours 30 minutes	2 hours 36 minutes
Aged 5-7				
School day	1 hour 12 minutes	0 hour 54 minutes	1 hour 36 minutes	LOW BASE
Weekend day	1 hour 54 minutes	1 hour 30 minutes	2 hours 30 minutes	LOW BASE
Aged 8-11				
School day	1 hour 42 minutes	1 hour 12 minutes	1 hour 36 minutes	1 hour 18 minutes
Weekend day	2 hours 36 minutes	2 hours 0 minutes	2 hours 36 minutes	1 hour 54 minutes
Aged 12-15				
School day	2 hours 36 minutes	1 hour 42 minutes	1 hour 42 minutes	2 hours 6 minutes
Weekend day	3 hours 42 minutes	2 hours 42 minutes	2 hours 30 minutes	3 hours 0 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).

Estimated time spent online by 3-4 year-olds has risen by an hour since 2017

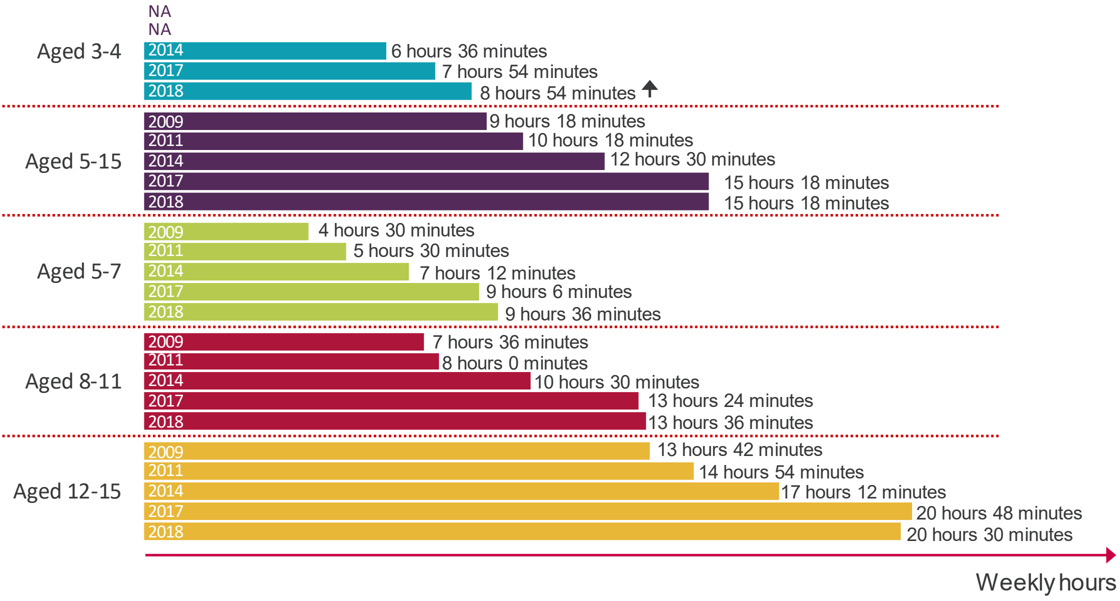
Children aged 5-15 who use the internet spend more than 15 hours online in total in a typical week (15 hours 18 minutes). The estimated weekly volume of time spent online at home or elsewhere increases with the age of the child: 8 hours 54 minutes for 3-4s, 9 hours 36 minutes for 5-7s, 13 hours 36 minutes for 8-11s and 20 hours 30 minutes for 12-15s.

As shown in Figure 3, these estimates of time spent online at home or elsewhere are unchanged since 2017 for 5-7s, 8-11s and 12-15s, although they have increased markedly over the last decade for these age groups. Among internet users aged 3-4 the estimated weekly volume of time spent online has increased by one hour since 2017: from 7 hours 54 minutes to 8 hours 54 minutes.

In 2018, boys aged 12-15 say they spend more hours online in a typical week (21 hours 42 minutes) compared to girls (19 hours 18 minutes).

The average time spent online in a typical week for all 5-15s is 15 hours 18 minutes. This rises to 16 hours 48 minutes for children in DE households. Children aged 3-4 in C2DE households spend more time online than those in ABC1 households (9 hours 54 minutes vs. 8 hours).

Figure 3: Estimated weekly hours of internet consumption by age, at home (2009, 2011) or elsewhere (2014, 2017 and 2018)



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 since 2014 they have been 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 2017 and 2018.

Children aged 5-15 who play games spend close to 11 hours per week gaming

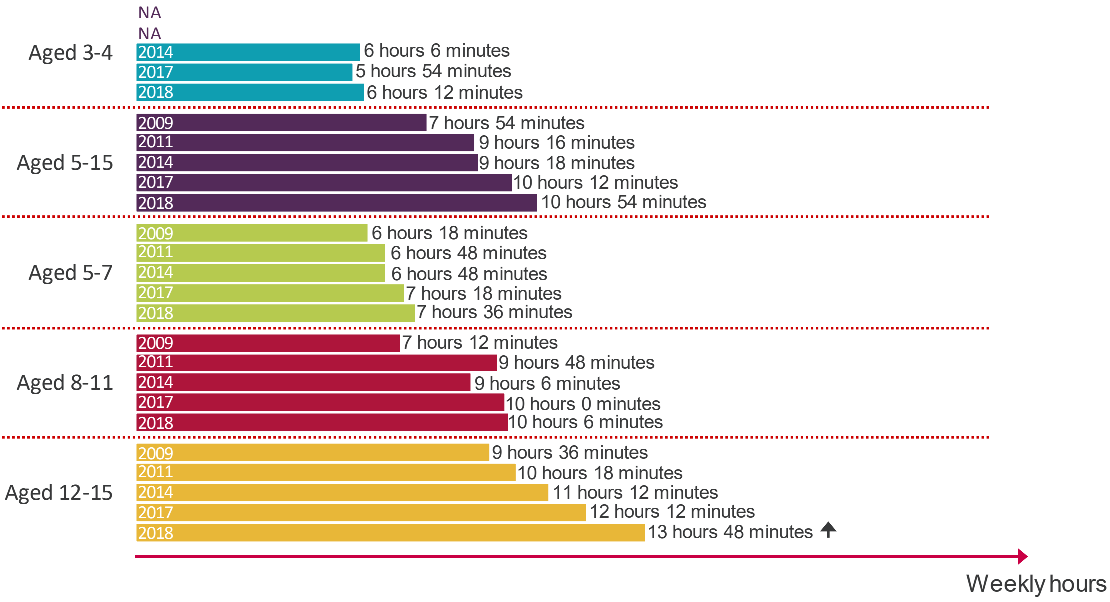
As with using the internet, the estimated weekly hours spent gaming at home or elsewhere increase with the age of the child, ranging from 6 hours 12 minutes for 3-4s to 13 hours 48 minutes for 12-15s.

As shown in Figure 4, there has been no change in the estimated time spent gaming compared to 2017 for 3-4s, 5-7s or 8-11s. Children aged 12-15 who play games say they spend an extra hour and a half gaming per week compared to last year.

As shown in Figure 5, boys in each age group spend more hours than girls in a typical week playing games, with the difference by gender increasing with the age of the child.

The average time spent gaming in a typical week for all 5-15s is 10 hours 54 minutes, decreasing to 8 hours 48 minutes for children in AB households. Children aged 3-4 in C2DE households spend more time gaming than those in ABC1 households (6 hours 54 minutes vs. 5 hours 24 minutes).

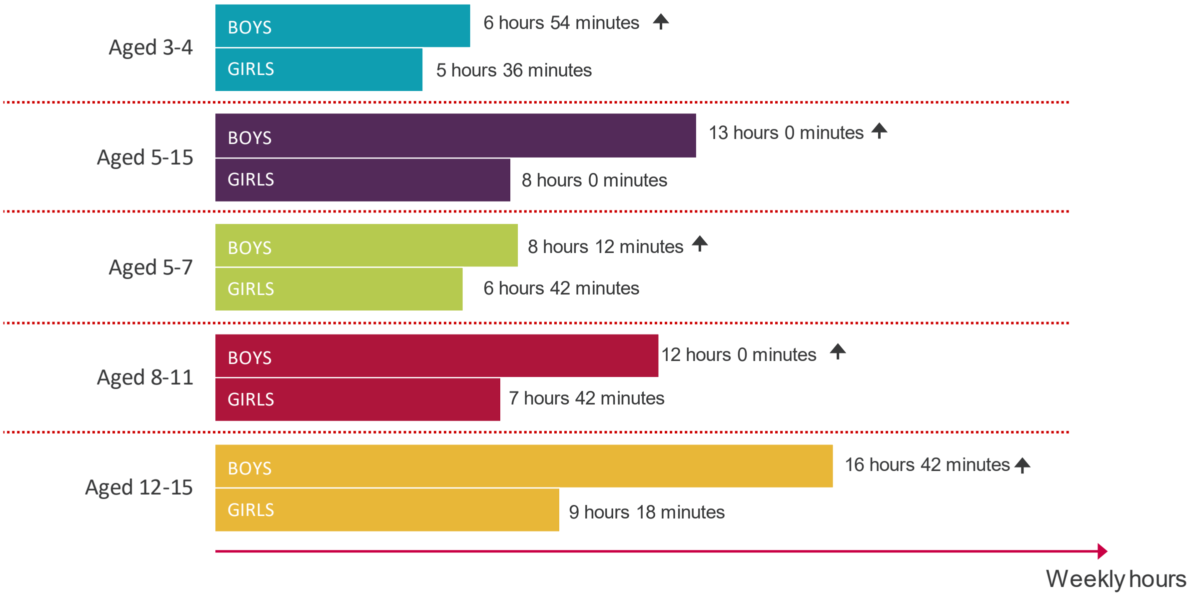
Figure 4: Estimated weekly hours of game playing by age at home (2009, 2011) or elsewhere (2014, 2017 and 2018)



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 2017 and 2018. Significance testing shows any change between 2017 and 2018.

Figure 5: Estimated weekly hours of game playing at home, by gender and age, 2018



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).

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 (117 boys aged 3-4, 111 girls aged 3-4, 588 boys aged 5-15, 427 girls aged 5-15, 158 boys aged 5-7, 119 girls aged 5-7, 205 boys aged 8-11, 164 girls aged 8-11, 225 boys aged 12-15, 144 girls aged 12-15). Significance testing shows any difference by gender.

Children aged 3-4, 8-11 and 12-15 spend less time per week watching TV on a TV set than in 2017

Unlike the time spent using other media detailed in this section, hours spent watching television on a TV set shows much less variation by age, as shown in Figure 6. In 2018, children aged 3-4 spend a similar amount of time watching TV on a TV set in a typical week as 5-7s and 12-15s, and more time than 8-11s.

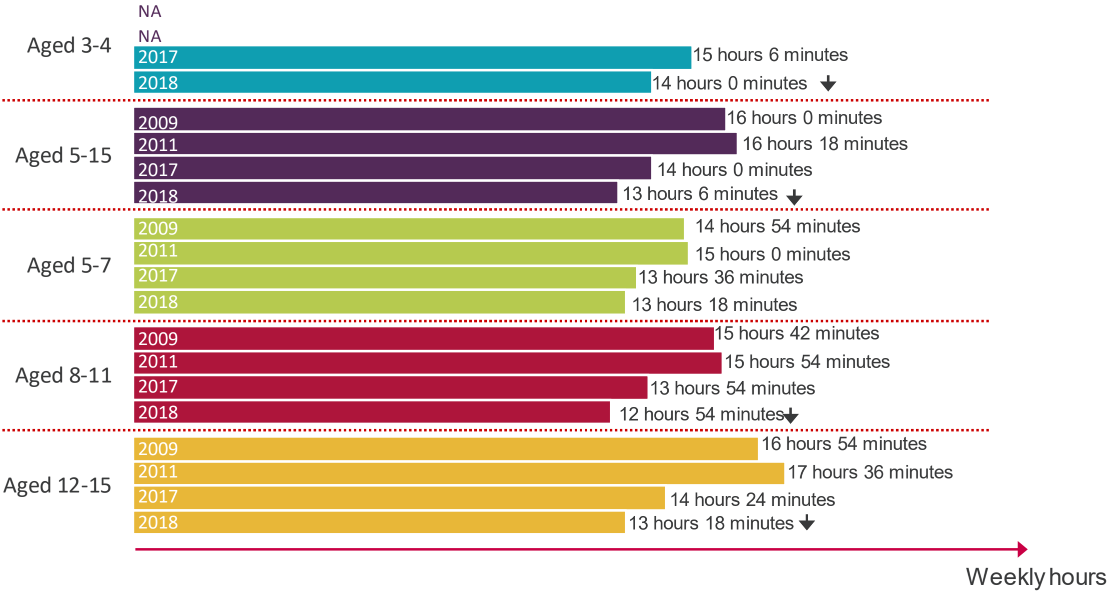
Compared to last year, there has been a decrease in the hours per week spent watching TV on a TV set among each of the age groups, with the exception of 5-7s.

Girls aged 12-15 say they spend more hours watching TV on a TV set in a typical week (14 hours 6 minutes) compared to boys (12 hours 30 minutes).

The average time spent watching television on a TV set for all 5-15s is 13 hours 6 minutes; this decreases to 11 hours 54 minutes for children in AB households. Children aged 3-4 in C2DE households spend more time than those in ABC1 households watching television on a TV set (15 hours 36 minutes vs. 12 hours 30 minutes).

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 6: Estimated weekly hours of television consumption by age, at home (2009, 2011) or elsewhere (2017, 2018)



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.

Base: Parents of children aged 3-7 who use watches television on a TV set (VARIABLE BASE). Significance testing shows any change between 2017 and 2018.

Insight from BARB: time spent watching the TV set

Examining 2017 data from BARB on time spent viewing (published as Annex 2) shows that children aged 4-15 watched an average of just over 10 hours of consolidated broadcast television per week in 2017 (including live viewing and time-shifted viewing up to seven days later). This is down by just under two hours per week since 2016. The decline is a continuation of longer-term annual falls in weekly viewing; there was a larger decline in 2017 than in 2016 (just over an hour) while in 2015 viewing fell by only 45 minutes.

BARB data also show that younger children watch more TV than older children. In 2017, children aged 4-9 watched an average of 11 hours per week compared to just over 9 hours per week among children aged 10-15.

The decline in weekly viewing among all children has been steep since 2012. The drop has been driven mainly by the 10-15 age group, who watched 7 and a half hours less per week on average in 2017 than in 2012. Viewing fell by nearly 6 hours 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, ITV, Channel 4 and Channel 5) and their respective portfolios has been more resilient than for other channels, having decreased to a lesser extent.

For children aged 4-15, unmatched viewing on the TV set, which includes subscription video-on-demand like Netflix, apps on smart TVs, DVDs and gaming, increased in 2017, but up to 7-day time-shifted and live viewing declined. On average, per week, children's live viewing decreased by 1 hour 39 minutes from 2016 to 2017, while 8-28-day time-shifted viewing and unmatched viewing together increased by just over an hour (1 hour 14 minutes), with most of this increase coming from unmatched viewing (Figure A1.3 in the BARB write up in Annex 2). This shows that not only are children spending less time using the TV set overall, but the type of content they are watching when they use the TV set is changing.

When we compare these findings with the findings of our 2018 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). As set out in Figure 6 above, in 2018 we saw a decrease of just under an hour in the hours per week spent watching television on a TV set among all 5-15s (from 14 hours in 2017 to 13 hours 6 minutes in 2018), with this decrease attributable to all ages except 5-7s. Like the BARB data, this indicates a continuation of longer-term annual falls in weekly viewing.

Children aged 12-15 say they spend close to 17 hours using their mobile phone in a typical week

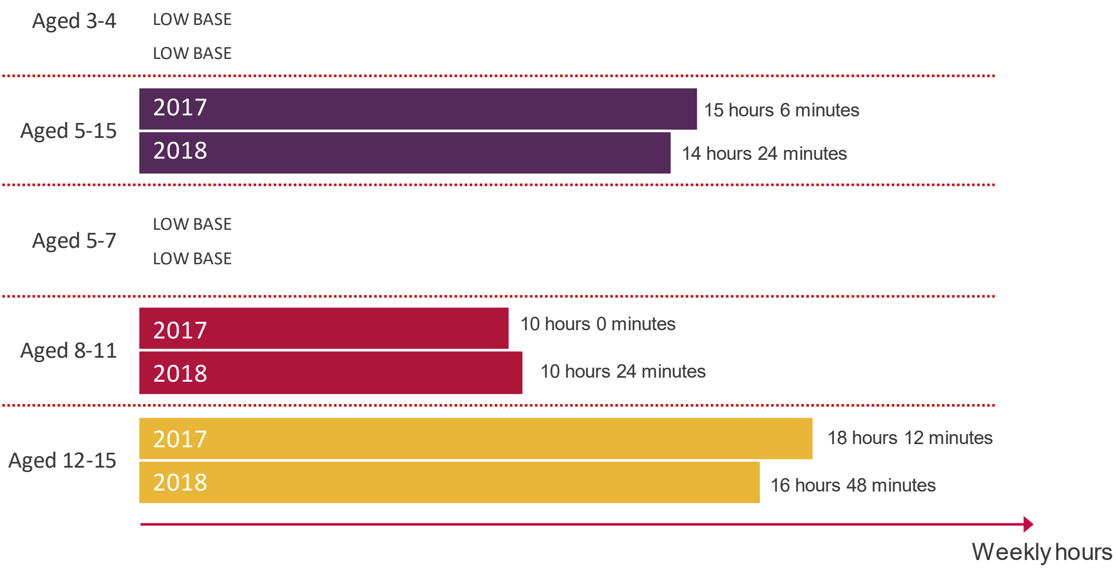
Parents of children aged 3-7[15], and children aged 8-11 and 12-15, were asked how many hours their child/ they spent using their mobile phone in a typical week[16]. The results for 5-15s overall and for 8-11s and 12-15s are shown in Figure 7.

Mobile phone users aged 8-11 say they spend 10 hours 24 minutes in a typical week using their phone, lower than the estimate made by 12-15s (16 hours 48 minutes).

As shown in Figure 7, there has been no change in the estimated time spent using a mobile phone by children aged 8-11 or 12-15, compared to 2017.

Girls aged 12-15 say they spend 18 hours 30 minutes in a typical week using their mobile phone, whereas boys say they typically spend 15 hours 6 minutes using their phone.

Figure 7: Estimated weekly hours of mobile phone use by age: 2017 and 2018



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).

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[15] Too few interviews were conducted with parents of mobile phone users aged 3-4 or 5-7 to show the data.
[16] 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”.

A3. Children’s use and ownership of media devices

This section looks at children’s use of media devices, use of the internet and gaming.

Key findings

Use of devices

- As in 2017, there are two devices that continue to be used by a majority of children at home in each age group: television sets[17] and tablets.
- Compared to last year, among 5-15s overall there has been a decrease in the use of computers, laptops, netbooks (63% vs. 69%), games consoles or players (53% vs. 60%) and DVD/ Blu-ray players (47% vs. 51%).

Access to devices at home

- Smart TV sets are the only type of device for which household access and use has increased for 5-15s, compared to 2017.
- Compared to 2017, home access to the internet (either through fixed broadband or a mobile network signal) has increased among 3-4s (from 81% to 86%) and among 12-15s (99% to 100%). These increases in access have not, however, contributed to an increase in time spent online for these age groups.

Child’s ownership of devices (as opposed to household ownership)

- Smartphone ownership is unchanged compared to 2017 for 3-4s (1%), 5-7s (5%), 8-11s (35%) and 12-15s (83%).
- Compared to 3-4s (19%), ownership of a tablet more than doubles among children aged 5-7 (42%). A comparable number of 8-11s (47%) and 12-15s (50%) own their own tablet. Since 2017, tablet ownership has increased only for 5-7s (42% vs. 35%).
- Girls aged 8-11 are more likely than boys of this age to own a tablet (52% vs. 42%). Parents of 3-4s in C2DE households are twice as likely as those in ABC1 households to say their child has their own tablet (26% vs. 13%).

Using the internet, and devices used to go online

- There has been no change in the incidence of internet use, compared to last year, for any age group. The overall incidence of internet use among 5-15s overall is 92%.
- Children aged 5-15 are, however, more likely to go online on smart TVs (13% vs. 9%).

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[17] Any type of television, whether a smart TV or a ‘standard’ TV set.

- While more than a quarter (27%) of 5-15s *only* use devices other than a computer to go online, this increases to a third (33%) of those in DE households.
- More than half (53%) of 12-15s say a mobile phone is the device they 'mostly' use to go online and this is more likely for girls of this age (62%) than for boys (45%).

Devices used for gaming

- Gaming on a games console or games player is less likely than in 2017 for 5-15s (50% vs. 59%), attributable to a decrease among 8-11s (50% vs. 59%). Children aged 5-15 are also less likely to play games on a computer, laptop or netbook.

Children's media use in the home

Compared to 2017, 5-15s are more likely to use smart TVs, but less likely to use desktops, laptops, netbooks, games consoles and DVD/Blu-ray players

This initial section looks at the specific devices children use, with subsequent sections covering the 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 8 shows the media used by all children aged 5-15, while Figure 9 shows the key media used by 3-4s, 5-7s, 8-11s and 12-15s.

Nearly all children aged 5-15 (97%) use a television set, with this incidence unchanged both at an overall level and for each of the three age groups since 2017. More than nine in ten parents of 3-4s (94%) say their child uses a television set, also unchanged since 2017.

The measures shown for the television set in Figure 8 and Figure 9 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, around half of 3-4s (52%) and six in ten 5-15s (61%) use one. Compared to 2017, use of a smart TV has increased among every age group.

As in 2017, apart from a TV set, the only other device used by a majority of children in each age groups is the tablet. Three in four 5-15s (76%) use a tablet, as do close to three in five (58%) 3-4s. Compared to last year, use of a tablet at home is unchanged for all age groups except 3-4s (58% vs. 65% in 2017). This decrease between 2017 and 2018 in use of a tablet among 3-4s should, however, be viewed in a wider context; as shown in Figure 9, it follows a corresponding increase between 2016 and 2017 (from 55% to 65%) and as such, use in 2018 is returning to an 'average' level over this three-year period.

Two-thirds (67%) of children aged 5-15 use a mobile phone. Use increases with age, rising from 32% of 3-4s to 94% of 12-15s[18]. Compared to last year, mobile phone use is unchanged among 5-15s overall and among 3-4s. Parents of children aged 5-7 are less likely to say their child uses a mobile phone compared to last year (33% vs. 43% in 2017). It is, however, worth noting that use among this age group increased between 2016 and 2017. As such, the decrease since last year reflects use returning to levels similar to those seen in earlier years.

More than three in five children aged 5-15 use an internet-connected desktop/ laptop/ netbook (63%); less likely now than in 2017 (69%). As in previous years, use of an internet-enabled desktop/ laptop/ netbook at home increases with age and rises from one in four 3-4s (23%) to close to four in five 12-15s (78%). Use of this device among 8-11s has decreased since 2017 (from 74% to 64%), following a corresponding increase between 2016 and 2017 (from 66% to 74%).

Three in five 5-15s use a digital video recorder (DVR) (63%), as in 2017. In 2018, use of a DVR is comparable for 5-7s (58%) and 8-11s (60%), and lower among 3-4s (44%). Use of a DVR by12-15s (69%) is higher than for any other age group of children.

Just over half of 5-15s (53%) use a games console or games player (like a PlayStation, Xbox, Nintendo Switch PS Vita etc.), and this figure is lower than in 2017 (60%). A minority of 3-4s (15%) and 5-7s (40%) use these types of devices at home, while this applies to over half of 8-11s (53%) and 12-15s (63%). The overall decline in use of a games console/ player use among 5-15s is attributable to fewer 8-11s using these devices compared to last year (53% vs. 66%).

Less than half of 5-15s use a DVD/ Blu-ray player (47%), a decrease from 51% in 2017. This decrease among 5-15s overall is only evident among 12-15s (45% vs. 52% in 2017). In 2018, use of a DVD/ Blu-ray player is lowest for 3-4s (38%) but does not vary within age among 5-15s.

A quarter of 5-15s use a radio set (either DAB or AM/FM), unchanged since 2017 (29%). Use of a radio set is higher among 8-15s and lower among 3-7s.

Although not shown in Figure 8 or Figure 9, one new device, smart speakers[19], was asked about in 2018. Fifteen per cent of 5-15s use smart speakers at home; accounting for one in ten 5-7s (11%) and around one in six 8-11s (16%) and 12-15s (18%). Less than one in ten 3-4s use a smart speaker at home (7%).

In 2018, boys in each age group from 3 to 15 are more likely than girls to use a games console or player, with the gap by gender increasing with the age of the child: 19% (boys) vs. 12% (girls) for 3-4s, 53% vs. 28% for 5-7s 73% vs. 34% for 8-11s and 87% vs. 40% for 12-15s. One other difference in device use at home by gender is also apparent: girls aged 8-11 are more likely than boys to use a

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[18] 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.

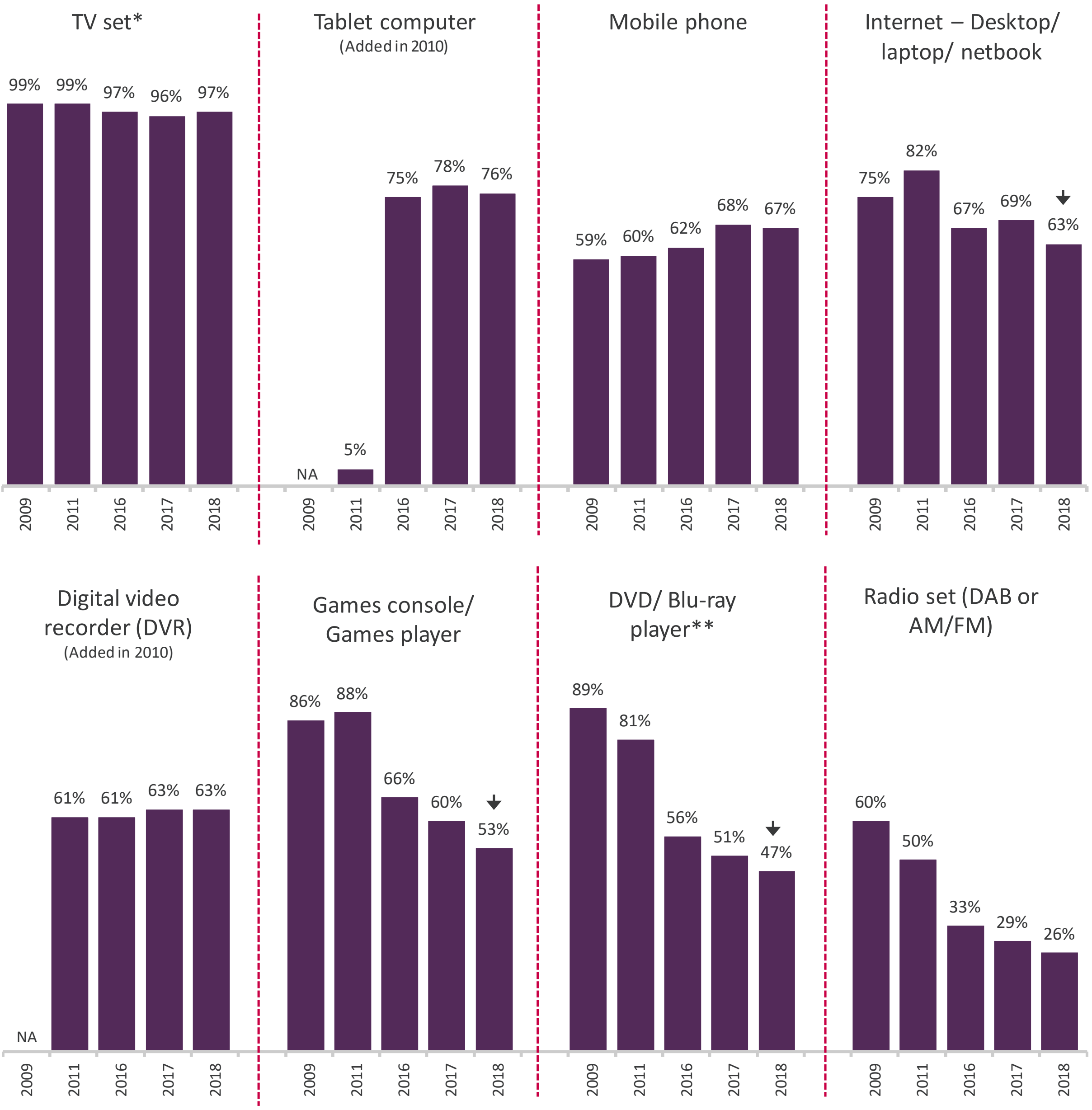
[19] The following description was read out to respondents: Smart speakers which can respond to voice commands – e.g. Amazon Echo (Alexa), Google HomePod.

mobile phone (72% vs. 61%), although this difference is not seen among the oldest children (95% for boys aged 12-15 vs. 93% for girls aged 12-15).

Children aged 3-4 in ABC1 households are more likely than those in C2DE households to use a smart TV (58% vs. 47%) or a DVR (50% vs. 38%). Those in C2DE households are more likely to use a 'standard' TV (68% vs. 59% for 3-4s in ABC1 households).

There are four devices that, compared to the average, are more likely to be used by 5-15s in AB households: a smart TV (68% vs. 61%), an internet-enabled desktop, laptop or netbook (72% vs. 63%), a tablet (83% vs. 76%) and a DVR player (70% vs. 63%). Children aged 5-15 in DE households are less likely than average to use a smart TV (53% vs. 61%), an internet-enabled desktop, laptop or netbook (54% vs. 63%) or smart speakers (9% vs. 15%).

Figure 8: Media used by children aged 5-15 at home: 2009, 2011, 2016, 2017, 2018



*QP3C/G/I/H - I’m going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use. (prompted responses, single coded) *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 asked about a DVD player/ DVD recorder/ Blu-ray recorder (fixed or portable).*

Base: Parents of children aged 5-15 (1430). Significance testing shows any change between 2017 and 2018.

Figure 9: Media used by children at home, by age: 2009, 2011, 2016, 2017 and 2018

*QP3C/G/I/H - I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use. (prompted responses, single coded) *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 asked about a DVD player/ DVD recorder/ Blu-ray recorder (fixed or portable).*

Base: Parents of children aged 3-4 (630) or 5-15 (448 aged 5-7, 497 aged 8-11, 485 aged 12-15). Significance testing shows any change between 2017 and 2018.

Use of devices in the context of household ownership

All 12-15s now have internet access at home, either through fixed broadband or a mobile network

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 10 summarises children’s access to[20] and use of devices at home, ranked by access to the device for children aged 5-15.

Some of the key changes are summarized below:

- The decrease in use of a tablet among 3-4s and in use of a desktop computer/ laptop/ netbook among 8-11s is not accompanied by an associated decrease in access to these devices for these children, suggesting that children may be opting to use these devices less.
- The decrease in use of a standard TV set and in use of a games console or player among 8-11s is accompanied by an associated decrease in access to these devices.
- Increased use of a smart TV among each age group of children is only associated with increased access to this device for 8-11s and 12-15s.
- Children aged 12-15 are less likely to use a DVD/ Blu-ray player at home, despite household access to this device being unchanged.

Figure 10 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). Internet access at home increases with the age of the child - close to nine in ten 3-4s have access at home (86%), increasing to more than nine in ten aged 5-7 (93%). Nearly all 8-11s (98%) and all 12-15s (100%) have access at home.

The gap between access to and use of the internet narrows as the child ages. Compared to 2017 home access has increased among 3-4s (from 81% to 86%) and among 12-15s (from 99% to 100%). For both these age groups there has been no change in use of the internet (at home or elsewhere).

When looking at differences in household access by gender, boys in each age group are more likely than girls to have access to games consoles or players at home: for 3-4s (47% boys vs. 36% girls), for 5-7s (66% vs. 48%), for 8-11s (77% vs. 51%) and for 12-15s (89% vs. 59%).

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[20] 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.

Among children aged 3-4, five devices are more likely in ABC1 households compared to C2DE households: a desktop computer, laptop or netbook (88% vs. 60%), a tablet (87% vs. 77%), a DVR (73% vs. 58%), a smart TV (68% vs. 55%) and smart speakers (20% vs. 13%).

There are six devices that parents in AB households are more likely to own, and parents in DE households are less likely to own, compared to the average for 5-15s: a tablet computer (93% for ABs vs.85% overall vs. 78% for DEs), an internet-enabled desktop/ laptop/ netbook computer (92% vs. 82% vs. 72%), a DVR (80% vs. 73% vs. 65%), a smart TV (73% vs. 65% vs. 58%), a DVD/ Blu-ray player (71% vs. 63% vs. 54%) and a radio (67% vs. 56% vs. 45%). Children aged 5-15 in DE households are also less likely than average to have access to smart speakers (13% vs. 21%).

Figure 10: Summary of access to and use of devices/ media, by age: 2018

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	82%	58%↓	85%	76%	85%	75%	85%	77%	85%	75%
Desktop computer/ laptop/ netbook – with internet access	74%	23%	82%	63% ↓	76%	42%	82%	64%↓	87%	78%
Standard TV set	70%	64%	76%↓	72% ↓	79%	72%	72% ↓	68%↓	79%	77%
DVR/ Digital video recorder	66%	44%	73%	63%	69%	58%	72%	60%	76%	69%
Games console/ games player	42%↓	15%	66%↓	53% ↓	57%	40%	64% ↓	53%↓	74%	63%
Smart TV set	61%	52%↑	65%↑	61% ↑	60%	55%↑	67% ↑	62%↑	67%↑	63% ↑
DVD/ Blu-ray player	59%	38%	63%	47% ↓	63%	47%	63%	50%	63%	45% ↓
Radio	52%	16%	56%	26%	54%	20%	55%	27%	58%	31%
Smart speakers	17%	7%	21%	15%	19%	11%	21%	16%	23%	18%
Mobile phone	1%	32%	48%	67%	7%	33%↓	40%	67%	87%	94%
ANY STANDARD/ SMART TV	99%	94%	98%↓	97%	99%	96%	97%	95%	99%	99%
ANY INTERNET	86%↑	52%	97%	92%	93%	82%	98%	93%	100%↑	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 (630) or 5-15 (1430 aged 5-15, 448 aged 5-7, 497 aged 8-11, 485 aged 12-15). Significance testing shows any change between 2017 and 2018.

Mobile phone ownership

Smartphone ownership is unchanged compared to 2017 among all children aged 3-15

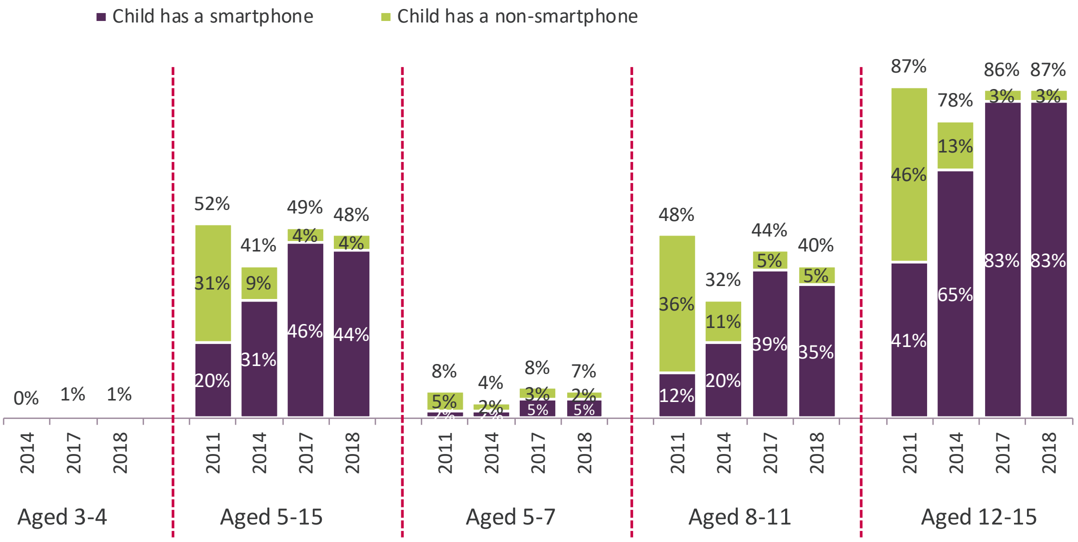
Figure 11 shows that close to half of all children aged 5-15 (48%) have a mobile phone of their own (any type) and nearly all of them (44%) have a smartphone.[21]

As in previous years, the likelihood of owning a smartphone increases with age, at just 1% of 3-4s, 5% of 5-7s, more than one third of 8-11s (35%) and more than eight in ten 12-15s (83%).

Smartphone ownership is unchanged compared to last year for each age group of children.

Overall ownership of a mobile phone or smartphone does not vary by gender within age, nor does it vary by household socio-economic group.

Figure 11: Smartphone and non-smartphone ownership, by age: 2011, 2014, 2017 and 2018



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).

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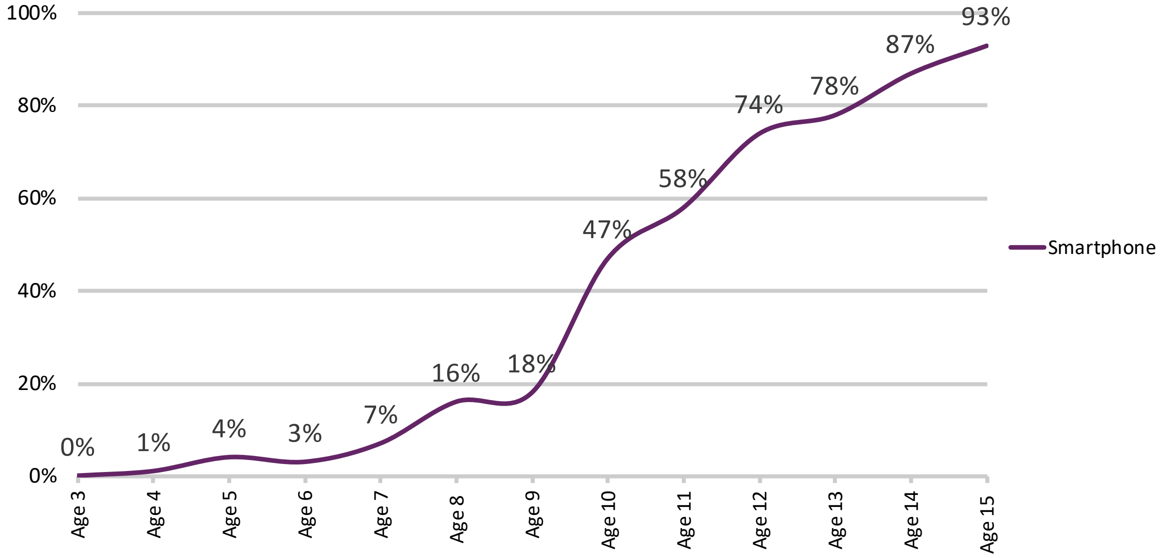
[21] The question (to parents) established smartphone ownership in the following way: “You mentioned that your child has their own mobile phone. Is this a smartphone? A smartphone is a phone on which you can easily access emails, download apps/ applications and other files, as well as view websites and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

Base: Parents of children aged 3-4 (630) or 5-15 (448 aged 5-7, 497 aged 8-11, 485 aged 12-15). Significance testing shows any change between 2017 and 2018.

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 then start to rise from age 7.

Between the ages of 9 and 10 smartphone ownership increases by 29 percentage points; from 18% to 47%.

Figure 12: Smartphone ownership, by age of child: 2018



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? (unprompted responses, single coded).

Base: Parents of children aged 3-4 or 5-15 (325 aged 3, 305 aged 4, 180 aged 5, 147 aged 6, 121 aged 7, 181 aged 8, 107 aged 9, 117 aged 10, 92 aged 11, 171 aged 12, 112 aged 13, 96 aged 14, 106 aged 15 in 2018).

Tablet ownership

Compared to last year, more 5-7s have their own tablet

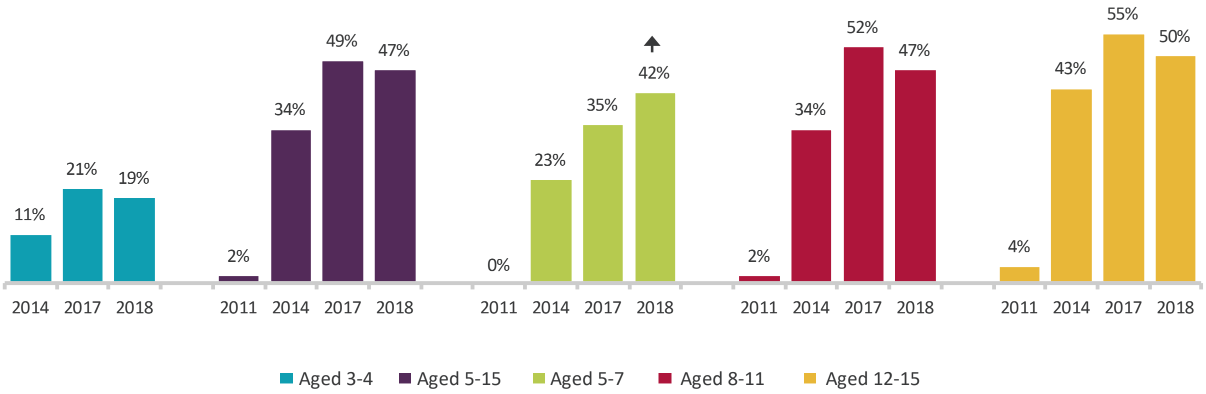
Figure 13 shows the incidence of tablet ownership among children, rather than household ownership. In 2018, tablets are owned by one in five 3-4s (19%) and close to half of 5-15 year-olds (47%).

Compared to 3-4s (19%), ownership of a tablet more than doubles by the time the child is aged 5-7 (42%). A comparable number of 8-11s (47%) and 12-15s (50%) own their own tablet.

Compared to 2017, tablet ownership has increased for 5-7s (42% vs. 35%).

Girls aged 8-11 are more likely than boys of this age to own a tablet (52% vs. 42%). Parents of 3-4s in C2DE households are twice as likely as those in ABC1 households to say their child has their own tablet (26% vs. 13%).

Figure 13: Tablet ownership, by age of child: 2011, 2014, 2017 and 2018

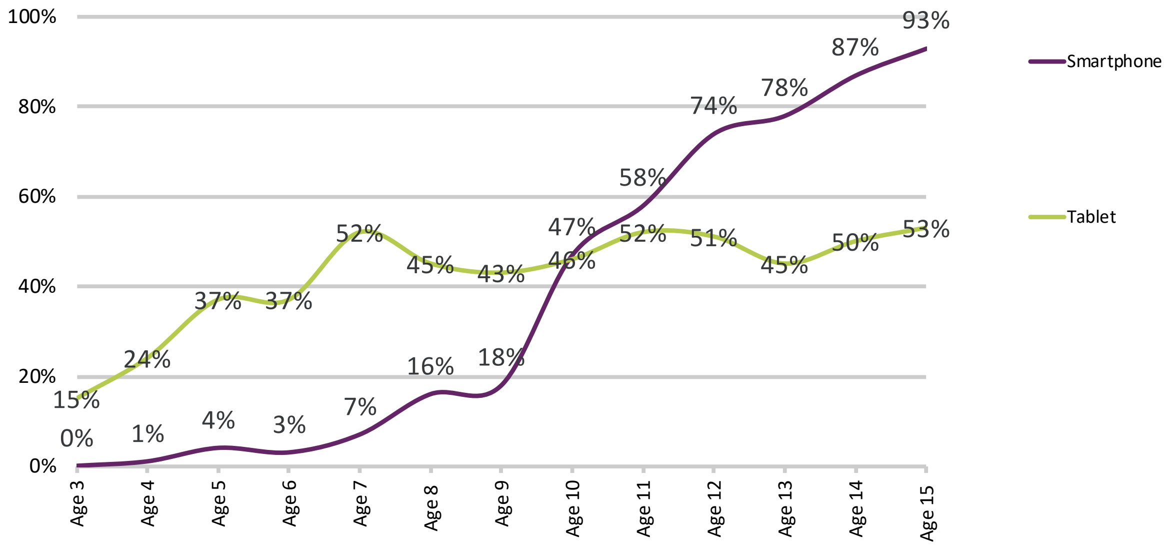


QP3E. I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use (prompted responses, single-coded).

Base: Parents of children aged 3-4 (630) or 5-15 (1430 aged 5-15, 448 aged 5-7, 497 aged 8-11, 485 aged 12-15). Significance testing shows any change between 2017 and 2018

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 age of 12 there is a clear preference for ownership of smartphones over tablets.

Figure 14: Tablet and smartphone ownership, by age of child: 2018



QP3E/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 (325 aged 3, 305 aged 4, 180 aged 5, 147 aged 6, 121 aged 7, 181 aged 8, 107 aged 9, 117 aged 10, 92 aged 11, 171 aged 12, 112 aged 13, 96 aged 14, 106 aged 15 in 2018).

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 ten[22] media devices we asked about are owned by children themselves, more than a quarter of children aged 3-4 (27%) own any of the devices asked about, compared to more than half aged 5-7 (58%), more than seven in ten 8-11s (73%) and more than nine in ten 12-15s (94%).

Most children aged 12-15 (61%) have three or more devices of their own, but this degree of multiple device ownership applies to less than half of 8-11s (35%) and a minority of 5-7s (17%) and 3-4s (4%).

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[22] In 2018 we asked about nine devices, rather than ten as in 2017. The figures are therefore not directly comparable.

The average number of devices owned by the child increases with each age group: 0.4 for 3-4s, 1.2 for 5-7s, 2.0 for 8-11s and 3.2 for 12-15s.

Devices used to watch television programmes or films

Use of alternative devices to watch TV has returned to 2016 levels

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. The reason for showing data for the three most recent years is to better explain the trend in use of various media devices to watch television programmes or films over this time period[23].

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; unchanged since 2017. As shown in Figure 16, watching on a TV set is more likely among 3-4s (96%), 5-7s (97%) and 8-11s (94%) than among 12-15s (90%). Each of these incidences is also unchanged compared to 2017.

One third of children aged 5-15 use a tablet to watch TV programmes or films (33%); a decrease since 2017 (40%). This follows a corresponding increase between 2016 and 2017; use of a tablet is returning to an 'average' level over this three-year period. Parents of 3-4s are now less likely to say their child uses a tablet for this purpose (23% vs. 33% in 2017), again, following an increase between 2016 and 2017.

One in five children aged 5-15 watch TV content on a mobile phone; this has also decreased since 2017 (26%) following an increase between 2016 and 2017. Parents of 3-4s are less likely than in 2017 to say their child uses a mobile phone for watching TV content (10% vs. 15%).

Use of a desktop computer, laptop or netbook for watching TV programmes or films is also lower among 5-15s compared to 2017 (17% vs. 23%). Five per cent of 3-4s use one of the devices to watch TV content, unchanged since last year.

Use of a games console or player to watch TV content is also lower for 5-15s compared to 2017 (13% vs. 16%) but this decrease is not attributable to any particular age group. Three per cent of 3-4s also watch TV programmes or films in this way.

Boys aged 8-11 and 12-15 are more likely than girls of these ages to say they watch TV programmes or films on a games console or player (12% vs. 6% for 8-11s and 31% vs. 8% for 12-15s). Girls aged 12-15 are more likely than boys to say they watch TV content on a TV set (95% vs. 86%).

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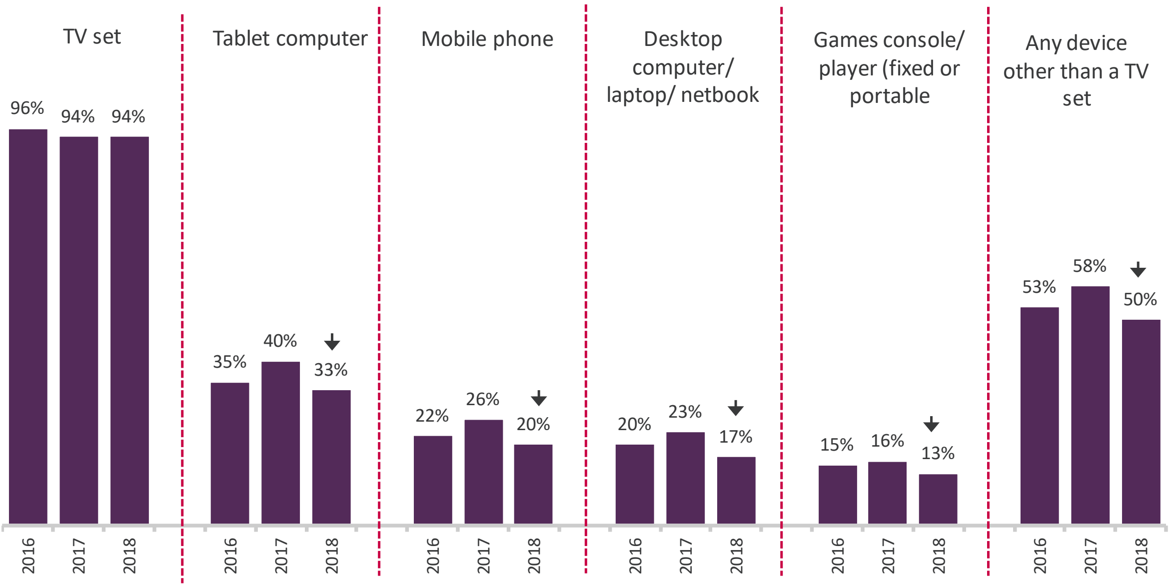
[23] At this question the results in 2018 show decreases compared to 2017 in the use of devices other than a TV set to watch TV content. In some instances, for some age groups of children, the data are returning to levels previously seen in 2016. It could also be the case that these decreases between 2017 and 2018 reflect children's preference to move away from watching content on smaller screens in favour of larger screens, particularly in the light of increased access to and use of smart TVs in the home, as discussed previously.

Compared to the average, children aged 5-15 in AB households are more likely to watch TV content on a tablet (40% vs. 33%). Watching on a desktop computer, laptop or netbook is lower than average for 5-15s in DE households (13% vs. 17%).

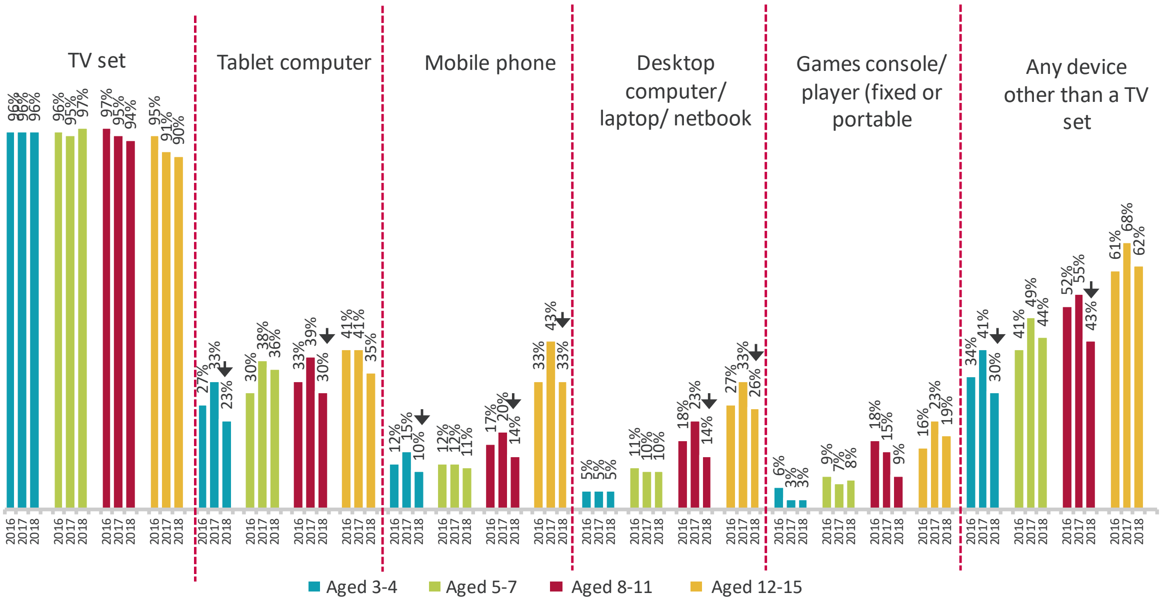
Figure 15: Devices ever used by children aged 5-15 to watch television programmes at home or elsewhere (2016, 2017 and 2018)



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.

Base: Parents of children aged 5-15 (1430). Significance testing shows any change between 2017 and 2018.

Figure 16: Devices ever used to watch television programmes at home or elsewhere (2016, 2017 and 2018), 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 for 3-7 year-olds and from children aged 8-15.

Base: Parents of children aged 3-4 (630) or 5-15 (448 aged 5-7, 497 aged 8-11, 485 aged 12-15). Significance testing shows any change between 2017 and 2018.

Internet use, by device

The overall incidence of going online is unchanged since last year

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

Figure 17 shows which devices the child ever uses to go online, at home or elsewhere, for 5-15s[24]. Figure 18 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[25].

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

[25] 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 earlier, more than nine in ten (92%) children aged 5-15 go online using any type of device, unchanged since 2017. As shown in Figure 18, going online using any type of device increases with age, ranging from 52% of 3-4s to 99% of 12-15s.

A majority of 5-15s use a tablet (64%) or a laptop/ netbook (58%) or to go online, while half use a mobile phone. More than one in five children aged 5-15 use a games console or player (23%) to go online and a similar proportion use a desktop computer (15%) or a smart TV (13%).

Compared to last year, among all 5-15s, laptops/ netbooks[26] (58% vs. 62%) and desktop computers (15% vs. 19%) are less likely to be used to go online. Smart TVs are more likely to be used to go online by 5-15s (13% vs. 9% in 2017).

As in 2017, no device is used to go online by a majority of 3-4s. Twice as many 3-4s use a tablet to go online (41%) compared to the next-most-used devices, laptop/netbooks (20%) or mobile phones (18%).

A tablet is the only device used to go online by more than half of 5-7s (63%). The next-most-used device to go online for this age group is the laptop/netbook, used by 37%. Nearly one in four 5-7s use a mobile phone to go online (22%).

In 2018, two in three children aged 8-11 say they use a tablet to go online, making this the most popular device for going online among this age group. Most 8-11s continue to go online on a laptop/ netbook (59%) but this is less likely than in 2017 (67%)[27]. Four in ten 8-11s use a mobile phone (41%), unchanged since last year. Use of a smart TV to go online has doubled for both 5-7s (5% to 10%) and 8-11s (6% to 12%) since 2017.

Four in five 12-15s use a mobile phone (79%) to go online and around three-quarters (73%) a laptop/netbook. More than three in five (64%) use a tablet computer and more than a third use a games console or player (35%).

More than a quarter of 5-15s (27%) use *only* a device other than a desktop, laptop or netbook to go online at home. Children aged 12-15 (17%) are less likely to access the internet in this way compared to 3-4s (30%), 5-7s (40%) and 8-11s (26%). Compared to 2017, using only an alternative device to go online is more likely among 5-15s (27% vs. 21%) and this overall increase is attributable to an increase among 5-7s (40% vs. 33%) and 8-11s (26% vs. 18%).

In 2018, there is no difference in the incidence of going online by gender within age among children aged 3 to 15, nor by household socio-economic group.

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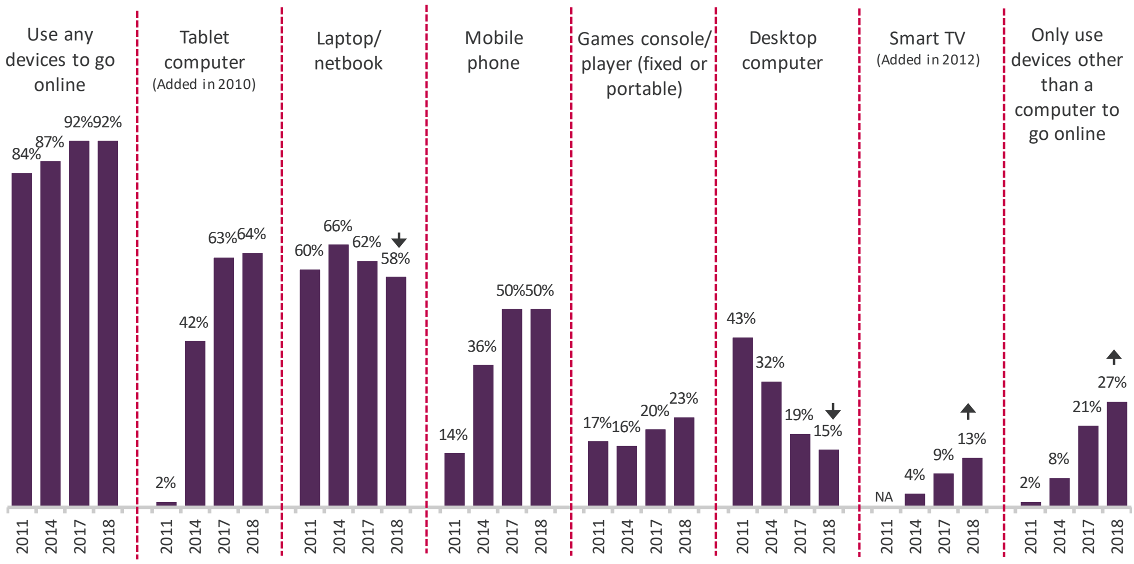
[26] This decrease follows a corresponding increase between 2016 and 2017 (from 58% to 62%).

[27] The decrease in use of a laptop/netbook to go online since 2017 for 8-11s (from 67% to 59%) follows a similar increase between 2016 and 2017 (from 55%).

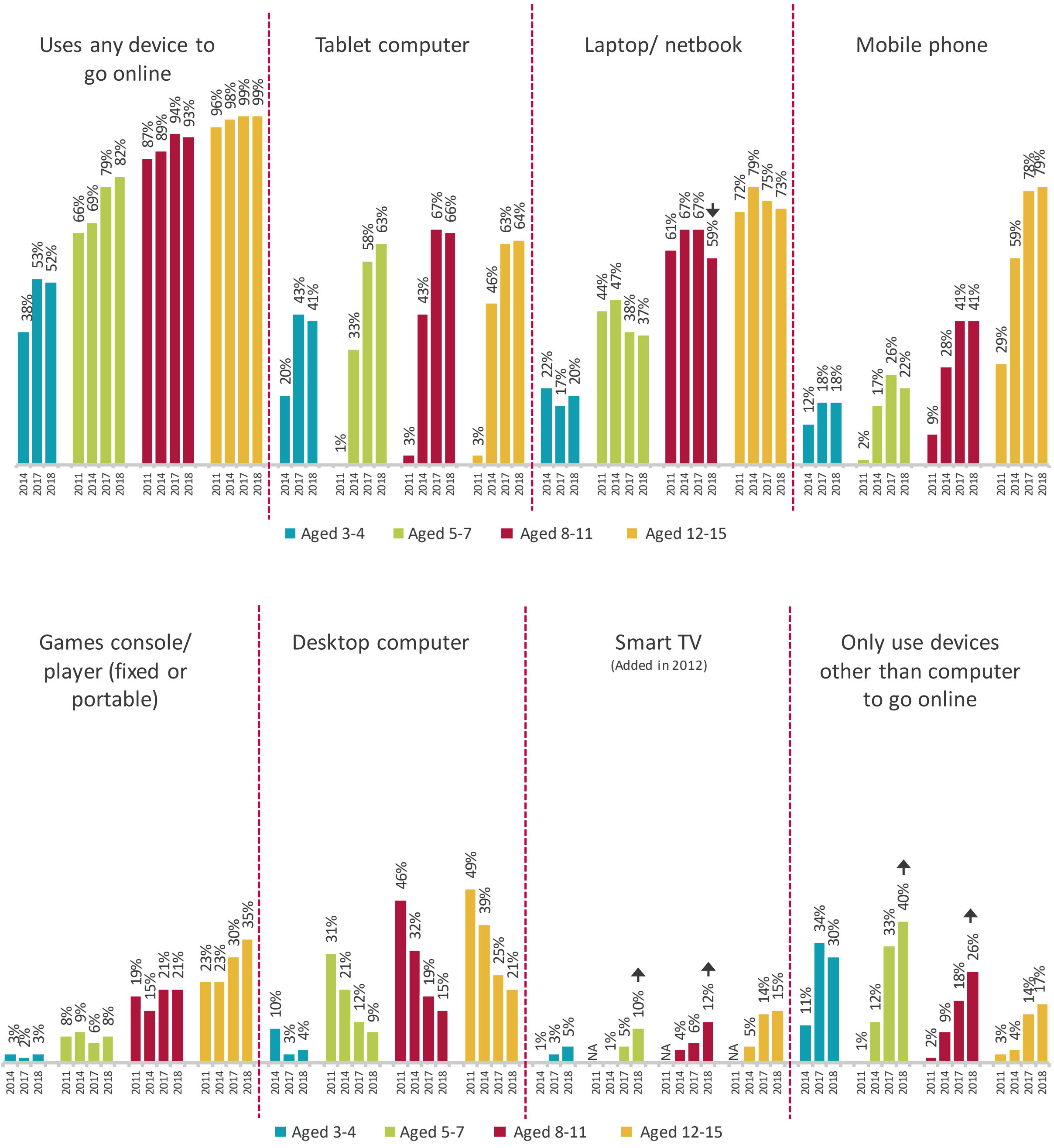
Figure 17: Devices ever used by children aged 5-15 to go online at home (2011) or elsewhere (2014, 2017, 2018)



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 (1430). Significance testing shows any change between 2017 and 2018.

Figure 18: Devices ever used by children to go online at home (2011) or elsewhere (2014, 2017, 2018), 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 have been asked about going online at home or elsewhere

Base: Parents of children aged 3-4 (630) or 5-15 (448 aged 5-7, 497 aged 8-11, 485 aged 12-15). Significance testing shows any change between 2017 and 2018.

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

More than half of 12-15s say a mobile phone is the device they 'mostly' use to go online

Figure 19 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[28].

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 (33%) or a laptop/ netbook (12%). Less than one in ten mostly use a games console/ player (8%) or a desktop computer (3%) to go online; desktops are less likely to be nominated in 2018 (3%) than they were in 2017 (6%).

In 2018, 3-4s (69%), 5-7s (67%) and 8-11s (45%) are all most likely to use a tablet to go online, with each of these incidences comparable to those in 2017. A comparable proportion of 3-4s (16%) and 5-7s (13%) say they mostly use a mobile phone to go online.

The next-most-used device to go online among 8-11s, after the tablet, is the mobile phone, mentioned by one quarter (24%). Sixteen per cent of 8-11s say they mostly use a laptop or netbook, higher than for any age group of children.

More than half of 12-15s nominate a mobile phone (53%) as the device mostly used to go online, while close to one in four (23%) mostly use a tablet. One in ten mostly use a games console or player or a laptop/ netbook. Since 2017, more 12-15s mostly use a games console or player to go online (11% vs. 7%).

Girls aged 12-15 are more likely than boys to mostly use a mobile phone to go online (62% vs. 45%). Games console/ players are more likely to be mostly used to go online by boys rather than girls for 3-4s (4% vs. 0%), 8-11s (17% vs. 1%) or 12-15s (20% vs. 2%).

Among 3-4s, those in ABC1 households are more likely than those in C2DE households to mostly use a tablet to go online (74% vs. 64%). In contrast, mobile phones are more likely to be mostly used by 3-4s in C2DE households (21%) compared to those in ABC1 households (11%).

Children aged 5-15 in DE households (12%) are more likely than average (8%) to mostly use a games console or player to go online.

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[28] 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 19: Device 'mostly' used by children to go online at home (2011) or elsewhere (2014, 2017, 2018), 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 (328) or 5-15 (1298 aged 5-15, 362 aged 5-7, 456 aged 8-11, 480 aged 12-15). Significance testing shows any change between 2017 and 2018.

Devices used to play games

5-15s are less likely than last year to play games on games consoles or computers

Figure 20 shows which devices children aged 5-15 ever use to play games at home or elsewhere[29]. Figure 21 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 2018, more than seven in ten children aged 5-15 (72%) play games at home or elsewhere on any type of device, unchanged since last year. Children aged 8-11 (74%) and 12-15 (76%) are more likely than 3-4s (36%) and 5-7s (63%) to play games on any type of device. Children aged 8-11 are less likely to play games compared to last year (74% vs. 81%).

Playing games on a games console (connected to a TV) or a handheld games player is still the most popular type of gaming among 5-15s (47%), although this is less likely than in 2017 (53%). Although at least half of 8-11s (50%) and 12-15s (57%) play games on a console or handheld device, only a minority of 3-4s (10%) and 5-7s (30%) do so. Gaming in this way is less likely for 8-11s compared to last year (50% vs. 59%)

One in three children aged 5-15 and close to one quarter of 3-4s (23%) play games on a tablet. Children aged 5-7 (41%) are more likely than 3-4s (23%), 8-11s (33%) or 12-15s (27%) to play games on this device.

Three in ten 5-15s (31%) play games on a mobile phone, also unchanged since 2017. Gaming on a mobile increases with the age of the child, accounting for one in six 3-4s (16%) and 5-7s (17%), a quarter of 8-11s and close to half of 12-15s (46%).

Fewer 5-15s play games on a computer, laptop or netbook, compared to last year (15% vs. 21%). Relatively few 3-4s (2%) and 5-7s (7%) game on these devices, increasing to one in six (17%) 8-11s and one in five 12-15s (20%). The decrease among 5-15s in gaming on these devices since last year is attributable to a fall among 5-7s (7% vs. 14% in 2017) and 8-11s (17% vs. 25% in 2017) doing this.

There are no differences by gender in the overall incidence of gaming among 3-4s; boys of this age are, however, more likely than girls to play games on a games console or games player (14% vs. 5%).

Boys in each age group from 5 to 15 are more likely than girls to play games (74% vs. 52% for 5-7s, 84% vs. 65% for 8-11s and 91% vs. 61% for 12-15s); this is mainly because boys are more likely to play games on a console or games player games (42% vs. 18% for 5-7s, 68% vs. 33% for 8-11s and

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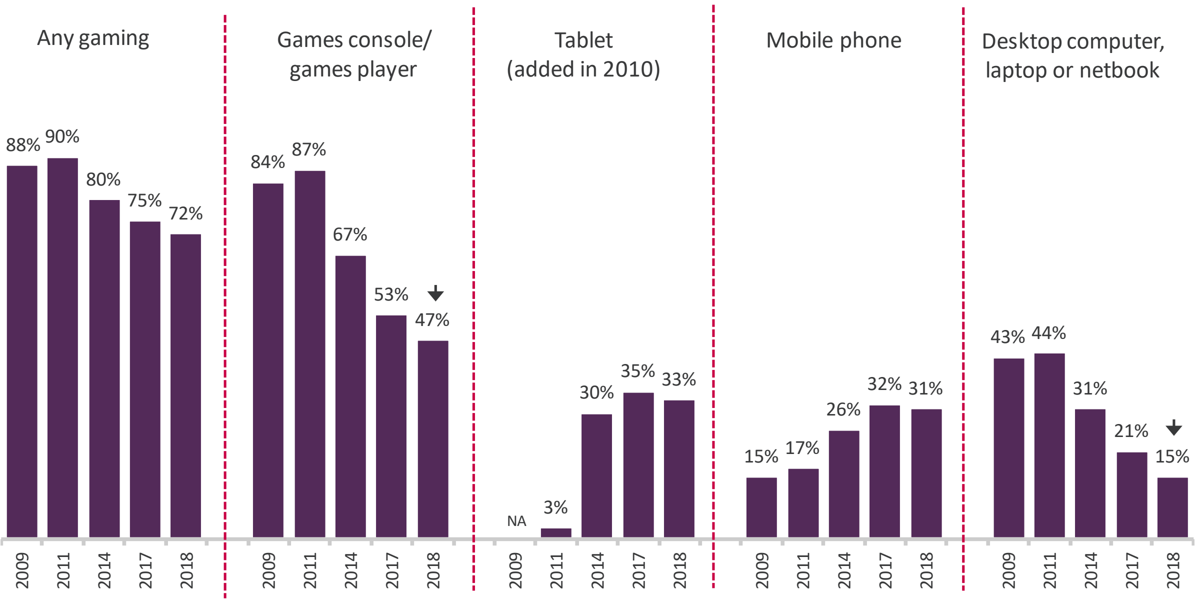
[29] Since 2014 responses have been taken from the parents of children aged 5-7 and from the child aged 8-11 or 12-15, whereas previously responses had been taken from the parent for children aged 8-11 and from the child aged 12-15. Since 2014 parents and children have been asked about devices used to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

80% vs. 33% for 12-15s). Boys aged 5-7 are also more likely than girls to play games on a desktop computer, laptop or netbook (9% vs. 4%) as are boys aged 12-15 (24% vs. 15%).

Parents of 3-4s in C2DE households are more likely than those in ABC1 households to say that their child ever plays games (41% vs. 32%); this is attributable to their child being more likely to game on a games console or games player (12% vs. 7%) or on a mobile phone (21% vs. 12%).

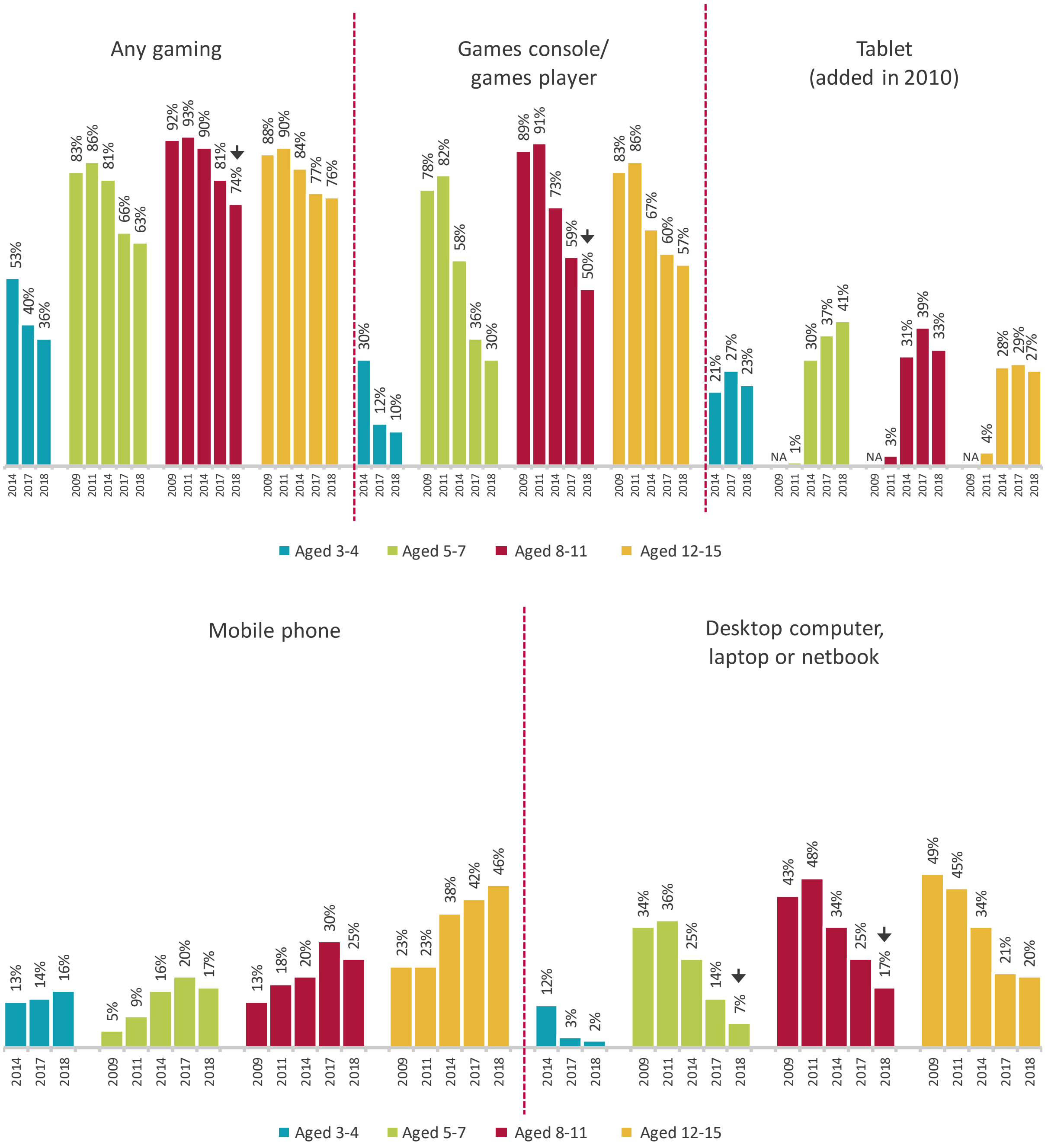
Figure 20: Devices used for gaming by children aged 5-15 at home (2009, 2011) or elsewhere (2014, 2017, 2018)



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 the child aged 8-11 and 12-15 rather than the parent.

Base: Parents of children aged 5-15 (1430). Significance testing shows any change between 2017 and 2018.

Figure 21: Devices used for gaming at home (2009, 2011) or elsewhere (2014, 2017, 2018), 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 have been asked about gaming at home or elsewhere. Since 2014 responses have been taken from the child aged 8-11 or aged 12-15 rather than the parent.

Base: Parents of children aged 3-4 (630) or 5-15 (448 aged 5-7, 497 aged 8-11, 485 aged 12-15). Significance testing shows any change between 2017 and 2018.

A4. Children's content consumption

This section reports on children's use of over-the-top (OTT)[30] television services such as Netflix, Amazon Prime Video and Now TV. It moves on to look at use of YouTube, including preferences for watching content on YouTube compared to television content through a TV set, and the type of content children access on YouTube.

It also reports on the extent to which children aged 8-15 feel there are enough programmes for children of their age or that reflect their experiences, in terms of showing children that 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 that it is important for programmes to meet these criteria.

Key findings

OTT television services

- A third of 3-4s (32%) and half of all 5-15s (49%) use OTT television services.
- Films are the most-mentioned 'favourite' content on OTT television services among 5-15s, particularly among 12-15s.
- Seven in ten 12-15s (71%) feel that their favourite OTT content is either aimed at people their age, people who are younger than them or at everyone, suggesting that they consider it to be age-appropriate. One quarter, however, feel that their favourite content is aimed at people older than them.
- Compared to the average for children aged 5-15, those in AB households are more likely to watch TV programmes or films on OTT television services (59% vs. 49%).

YouTube

- YouTube use is unchanged since last year with close to half of 3-4s (45%) and four in five (80%) 5-15s ever having used it.
- Compared to 2017, children aged 3-4 and 5-15 are more likely to watch vloggers on YouTube.
- 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 aged 12-15 are more likely than boys to watch music videos, vloggers and whole programmes or films on YouTube.

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[30] OTT refers to audio-visual content delivered on the 'open' internet rather than over a managed IPTV architecture.

- Among those who watch both, there is a clear preference for watching YouTube content rather than TV programmes on a TV set, for children aged 8-11 (49% vs. 14%) and 12-15 (49% vs. 16%). Eight to 11 year-olds are more likely than last year to say they prefer to watch YouTube content (49% for 40%).

Attitudes towards TV content

- As in 2017, more than one in five 8-11s and 12-15s say there are not enough TV programmes for children their age.
- Girls aged 12-15 are more likely than boys to say it is important that TV programmes show children that look like them

Devices used to watch TV content

Before looking at children's use of over-the-top[31] (OTT) television services it is worth referencing the data shown earlier in this report (Figure 15 and Figure 16), detailing the devices that children use to watch television programmes or films at home or elsewhere[32], in order to put these findings into context. The data for 2018 have been summarised below:

- Ninety-four per cent of children aged 5-15 watch television content on a TV set; this is more likely for 5-7s (97%) and less likely for 12-15s (90%), while 96% of parents of 3-4s also say their child watches content on a TV set.
- Nearly a quarter (23%) of 3-4s and a third of 5-15s (33%) watch television content on a tablet, with no difference in this incidence by the age of the child among 5-15s.
- Around one in ten 3-4s (10%) and 5-7s (11%) watch television on a mobile phone. Fourteen per cent of 8-11s use this device to view television content, and this increases to 33% of 12-15s.
- Watching TV content on a desktop computer/ laptop/ netbook increases with the age of the child, ranging from 5% of 3-4s to 26% of 12-15s
- One in eight 5-15s (13%) use a games console or player to watch television programmes or films; this is more likely for 12-15s (19%) than 5-7s (8%) or 8-11s (9%). Relatively few 3-4s (3%) use a gaming device for this purpose.
- Looking across all these devices, three in ten 3-4s (30%) and half of 5-15s (50%) watch television on devices *other than* a TV set. Among 5-15s this incidence ranges from 44% for 5-7s to 62% for 12-15s.

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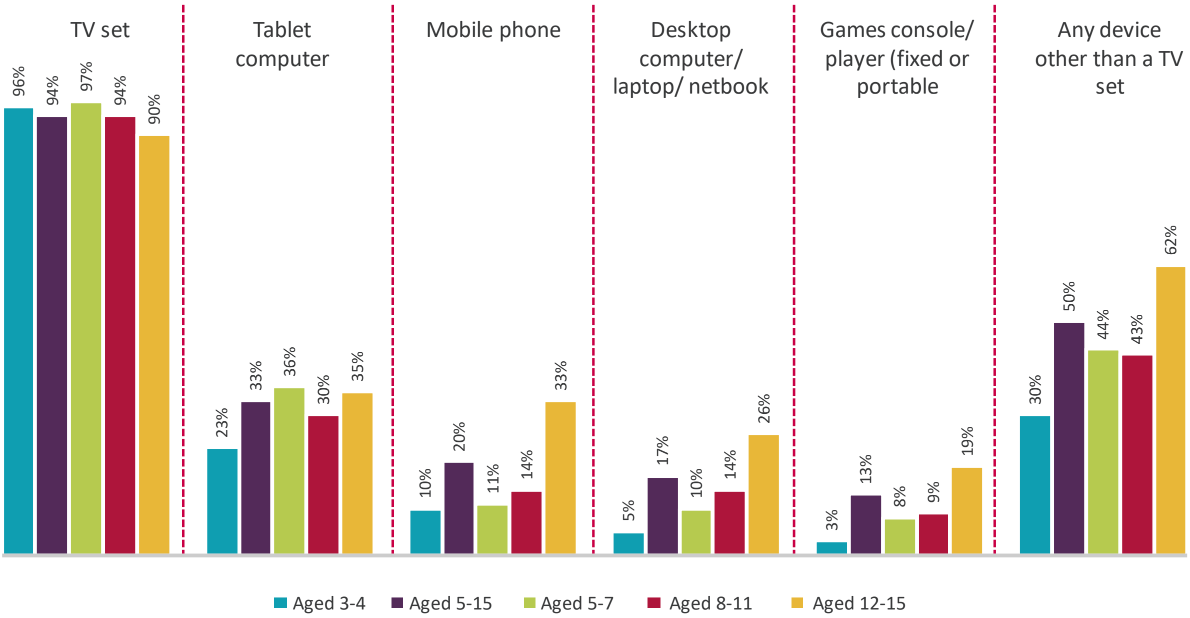
[31] OTT refers to audio-visual content delivered on the 'open' internet rather than over a managed IPTV architecture.

[32] Respondents were encouraged to think about the content that they might watch in its broadest context, including watching live broadcast content, anything recorded from the TV to view later, or any use of catch-up services or other on-demand content. This also includes content watched through OTT television services.

Figure 22:Devices ever used by children to watch television programmes or films at home or elsewhere, by age: 2018



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

Base: Parents of children aged 3-4 (630) or 5-15 (448 aged 5-7, 497 aged 8-11, 485 aged 12-15).

Insight from BARB: what children watch on the TV set

BARB data published in Annex 2 show that 63% of 4-15s' total TV viewing took place in adult airtime. However, this figure varied 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 (51%) of 4-9 year-olds' viewing time.

Twelve of the 20 most-watched programmes by children aged 4-15 were on BBC One, with one on Channel 4 and Sky Cinema, and the remainder on ITV. Virtually all the programmes were in peak family viewing time. *Britain's Got Talent* was the most popular programme overall, with 1.5 million children watching.

There was one children's-genre film in the top 20, *The Highway Rat* on BBC One. This achieved 1.4 million viewers on average. Younger children, aged 4-9, watched a higher proportion of films than did all children (eight of the top 20). *The Highway Rat* moved from second to first position in this list for younger children.

Use of OTT television services

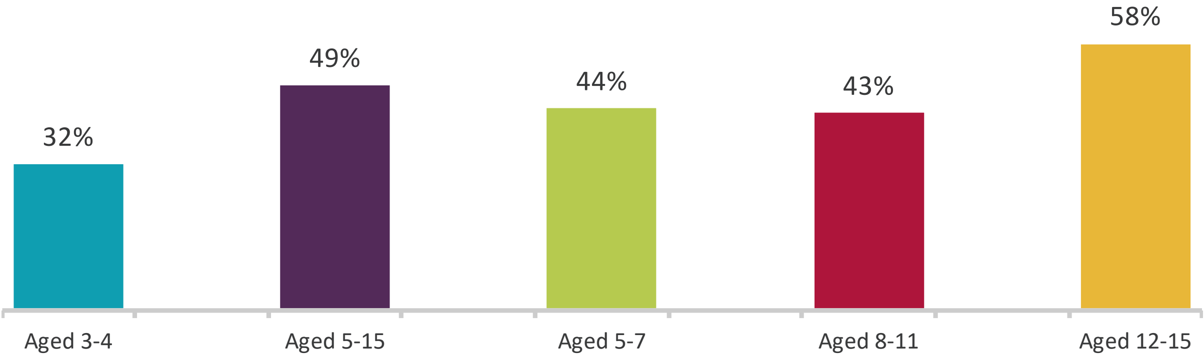
Half of all 5-15s use OTT television services

Parents of children aged 3-4 and 5-7, and children aged 8-11 and 12-15, were asked whether their child/ they ever watch TV programmes or films via any paid-for on-demand or streaming TV and video services such as Netflix, NOW TV or Amazon Prime Video.

As shown in Figure 23, a third of 3-4s (32%) and half of 5-15s (49%) watch content on OTT TV services. A similar proportion of 5-7s (44%) and 8-11s (43%) use these services, rising to 58% among 12-15s.

Compared to the average for children aged 5-15, those in AB households are more likely to watch TV programmes or films on OTT television services (59% vs. 49%).

Figure 23: Incidence of watching content on OTT television services:2018



QP6/ QC2A. Does your child ever watch TV programmes or films via any on-demand and streaming TV and video services that you pay to receive, such as Netflix, Now TV or Amazon Prime Video? (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 (630) or 5-15 (1430 aged 5-15, 448 aged 5-7, 497 aged 8-11, 485 aged 12-15).

Films are the most-nominated 'favourite' content on OTT services among 5-15s, particularly among older children

In 2018, in addition to asking about use of OTT television services, parents of children aged 3-11 and children aged 12-15 who watch content on OTT services were asked the following question: "Thinking now about the types of things your child watches/ you watch on Netflix, Now TV or Amazon Prime Video, what is the TV programme, box set or film that is currently their/ your favourite thing to watch?". Figure 24 shows the top ten favourite content nominations by age group.

Among children aged 5-15, viewing is relatively broad, with no single programme, box set, film or other type of content nominated by more than one in ten respondents.

In summary, when looking at nominations by age group, children aged 5-7 are interested in watching content aimed at their age group (i.e. *Paw Patrol*, Pokémon, cartoons, Disney content etc.). Among children aged 8-11, 'films' are currently the most favoured content (4%), followed by unspecified Netflix content (4%) and unspecified Disney content (3%). One in ten parents of 8-11s said that there was 'nothing in particular' or were unsure about the child's favourite type of content.

The most-mentioned content among 12-15s is films (7%). Children of this age group are more likely to nominate young adult or 'teen' content such as *The Vampire Diaries* (4%) and *Pretty Little Liars* (4%). Children of this age are also interested in watching comedy programmes such as *Brooklyn Nine-Nine* (4%), *Friends* (2%) or unspecified or general comedy content (2%). Three per cent of 12-15s say that *Love Island* is their favourite programme, with 2% mentioning *Game of Thrones*, suggesting that some content may not always be age-appropriate.

Girls aged 12-15 are more likely than boys to nominate *The Vampire Diaries* (8% vs. 1%), *Pretty Little Liars* (7% vs. 0%), *Riverdale* (5% vs. 1%) or *Love Island* (5% vs. 1%) as their favourite content. Boys aged 12-15 are more likely to mention comedy (4% vs. 1%) to say they don't have a favourite show, or to be unsure about this (14% vs. 8%).

Figure 24: Top ten favourite content watched on OTT services, by age: 2018

Aged 3-4	%
Peppa Pig	14%
Paw Patrol	11%
Ben and Hollys' Little Kingdom	3%
Disney (unspecified)	3%
Blaze and the Monster Machines	3%
PJ Masks	3%
Horrid Henry	3%
Boss Baby	2%
CBeebies	2%
My Little Pony	2%
None in particular/ DK	4%

Aged 5-15	%
Films (unspecified)	5%
Netflix (unspecified)	3%
Disney (unspecified)	2%
The Vampire Diaries	2%
Paw Patrol	2%
Pretty Little Liars	2%
The Simpsons	2%
Brooklyn Nine-Nine	2%
Love Island	1%
YouTube	1%
None in particular/ DK	10%

Aged 5-7	%
Paw Patrol	6%
Pokemon	4%
Films (unspecified)	4%
Cartoons (unspecified)	4%
Disney (unspecified)	3%
SpongeBob SquarePants	3%
Horrid Henry	3%
Netflix (unspecified)	3%
Power Rangers	3%
Peppa Pig	3%
None in particular/ DK	8%

Aged 8-11	%
Films (unspecified)	4%
Netflix (unspecified)	4%
Disney (unspecified)	3%
Cooking programmes	2%
The Simpsons	2%
YouTube	2%
Marvel (unspecified)	2%
The Next Step	2%
Paw Patrol	1%
iCarly	1%
None in particular/ DK	10%

Aged 12-15	%
Films (unspecified)	7%
The Vampire Diaries	4%
Brooklyn Nine-Nine	4%
Pretty Little Liars	4%
Netflix (unspecified)	3%
Riverdale	3%
Love Island	3%
Comedy (unspecified)	2%
Friends	2%
Game of Thrones	2%
None in particular/ DK	11%

QP7/ QC2B – Thinking now about the types of things your child watches on Netflix, Now TV or Amazon Prime Video, what is the TV programme, box set or film that is currently their favourite thing to watch? (unprompted responses, single coded) Responses from parents of 3-11s year olds and from children aged 12-15.

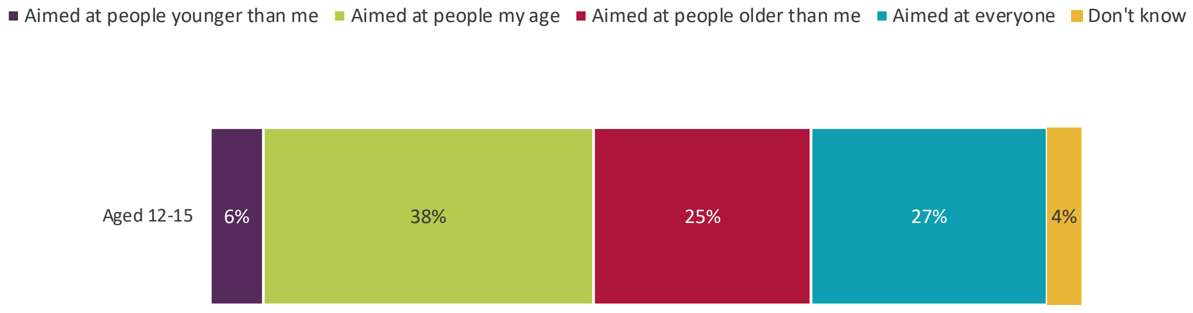
Base: Children who watch content on OTT services aged 3-4 (203) or 5-15 (685 aged 5-15, 198 aged 5-7, 211 aged 8-11, 276 aged 12-15).

While most users of OTT services aged 12-15 consider their favourite content to be age-appropriate, a quarter feel it is aimed at people older than them

Children aged 12-15 who use OTT services and nominated a favourite TV programme, box set or film, were asked whom they thought this favourite content is aimed at. They were prompted with the following five options and were asked to say which best applies: aimed at people younger than me, aimed at people my age, aimed at people older than me, aimed at everyone or that they were unsure who the content was aimed at. The results are shown in Figure 25.

Close to two in five 12-15s (38%) nominating favourite OTT content feel that this content is aimed at people their age, while a quarter (25%) feel it is aimed at people older than them. Less than one in ten (6%) consider it aimed at children younger than them, and 27% feel that their favourite content is aimed at everyone.

Figure 25: Perception of whom their favourite OTT content is aimed at, among 12-15s who use OTT services



QC2C – Which one of these statements best describes the type of people that [FAVOURITE SHOW] is aimed at? (prompted responses, single coded)

Base: Children aged 12-15 who use OTT services and nominate a favourite programme, film or box set (245 aged 12-15).

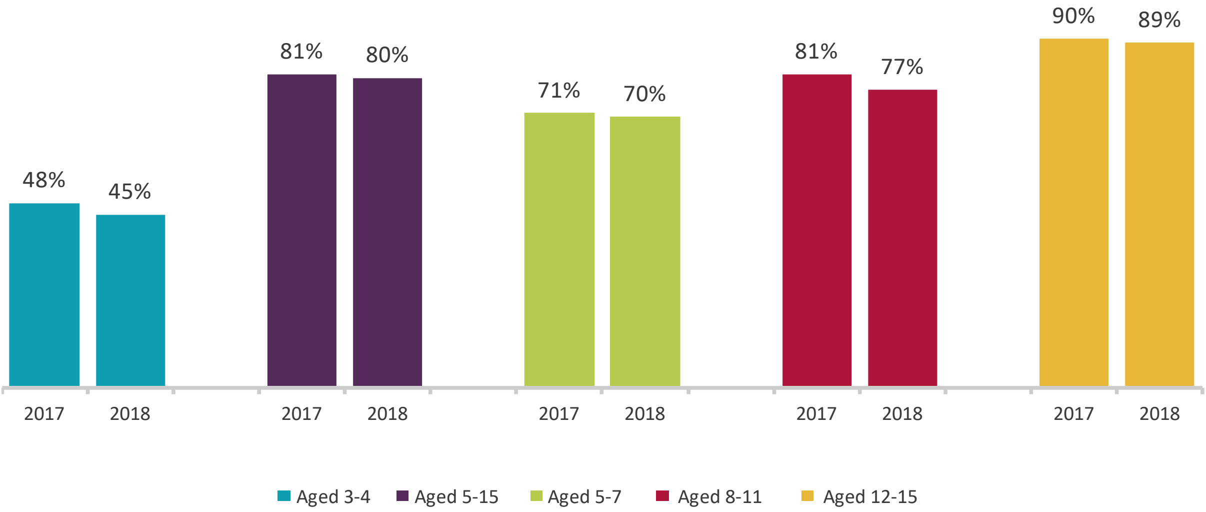
Use of YouTube

Use of YouTube by 3-4s and 5-15s is unchanged since 2017

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 26, eight in ten of all children aged 5-15 (80%) ever use YouTube. Use increases with the age of the child, ranging from more than 45% of 3-4s to 89% of 12-15s.

There has been no change since last year in the incidence of YouTube use among any age group of child. But it is worth noting that this follows substantial increases in use of YouTube between 2016 and 2017, as discussed in last year's report[33].

Figure 26: Incidence of using the YouTube website or app: 2017 and 2018



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 (630) or 5-15 (1430 aged 5-15, 448 aged 5-7, 497 aged 8-11, 485 aged 12-15).

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[33] Between 2016 and 2017, the incidence of YouTube use increased by 11 percentage points for children aged 3-4 (48% vs. 37% in 2016), by 17 percentage points for children aged 5-7 (71% vs. 54% in 2016), and by eight percentage points for children aged 8-11 (81% vs. 73% in 2016).

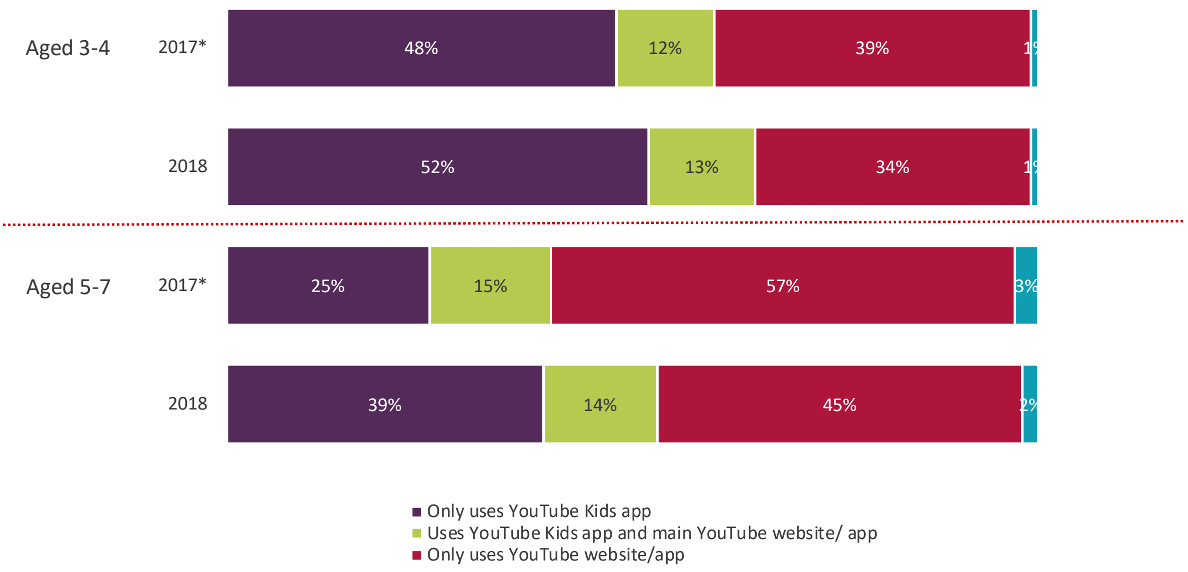
Half of YouTube users aged 3-4 and two in five aged 5-7 only use the YouTube Kids app

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 children, or uses both.

As shown in Figure 27, half (52%) of YouTube users aged 3-4 and two in five (39%) of YouTube users aged 5-7 use only the YouTube Kids app. The main YouTube website or app is therefore used by close to half of 3-4s (47%) and more than half (60%) of 5-7s who use YouTube.

While the data for 2017 is also shown in Figure 27, the question wording was amended in 2018[34] which may have affected the trend shown. The differences between 2017 and 2018 have therefore not been tested for statistical significance.

Figure 27: Use of YouTube Kids app and main YouTube website/ app: 2017, 2018



*QP22B - Do they use the main YouTube website or app, or the app that is aimed specifically at children called YouTube Kids, or do they use both? (unprompted responses, multi coded). * NB in 2017 the question was "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?" which may have influenced the responses given by parents, particularly those with children aged 5-7*

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[34] in 2017 the question was "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?" In 2018 the question text was amended to refer to 'children' rather than 'under-5s' which may have influenced the responses given by parents, particularly those with children aged 5-7.

Base: Parents of children aged 3-7 whose child uses the YouTube website or app (282 aged 3-4, 309 aged 5-7).

Vloggers, TV programmes/ films, 'how-to' and unboxing videos have all grown in popularity on YouTube since 2017 for 5-15s

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

As shown in Figure 28, 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 (80%). The next most popular YouTube activities among 3-4s are watching funny videos/ jokes/ pranks or challenges (40%), watching unboxing videos (27%), music videos (25%) and watching game tutorials or 'walk-throughs' (22%). All other types of content are used 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 (65%) and funny videos/ jokes/ pranks or challenges (61%). About four in ten parents of 5-7s say their child watches music videos (43%) with at least three in ten saying their child watches 'how to' videos or tutorials (34%), game tutorials or 'walk-throughs' (33%) or unboxing videos (32%). A quarter of parents of 5-7s say their child watches content posted by vloggers (25%).

A majority of 8-11s who use YouTube say they watch funny videos/ jokes/ pranks or challenges (75%) and music videos (58%), while close to half watch cartoons/ animations/ mini-movies or songs (48%) or 'how-to' videos or tutorials (46%). For 8-11s, watching cartoons/ animations/ mini-movies or songs is less likely compared to younger children; 8-11s are much more interested in watching film trailers, clips or programme highlights.

Three-quarters of YouTube users aged 12-15 say they watch funny videos/ jokes/ pranks/ challenges (74%) or music videos (74%) with half watching vloggers (52%) or 'how-to' videos or tutorials (50%). YouTube users aged 12-15 are more likely than younger children to watch music videos (74%), vloggers (52%), game tutorials/ 'walk-throughs' (47%) or film trailers, clips or programme highlights (43%). Users aged 12-15 do not differ from 8-11s in terms of watching funny videos (74%), 'how-to' videos (50%), sports or football clips (33%) or whole programmes or films (31%).

Compared to 2017, 3-4s (15% vs 6%) 5-7s (25% vs. 16%) and 12-15s (52% vs. 40%) are more likely to watch vloggers on YouTube. Children aged 3-4 are also more likely to watch game tutorials or 'walk-throughs' (22% vs. 12%) and this is also the case for 12-15s (47% vs. 40%). Children aged 12-15 are also more likely to say they watch 'how-to' videos or tutorials (50% vs. 43%).

Parents of 5-7 are more likely than in 2017 to say that their child watches unboxing videos (32% vs. 20%). At an overall level, children aged 5-15 are more likely to watch whole programmes or films (26% vs. 22%) but this is not attributable to any particular age group. Compared to 2017, parents of 3-4s are less likely to say their child watches music videos (25% vs. 33%).

Boys in each age group between 5 and 15 are more likely than girls to watch game tutorials or 'walk-throughs' (41% vs. 24% for 5-7s, 53% vs. 27% for 8-11s, 62% vs. 32% for 12-15s) and to watch sports/ football clips or videos (21% vs. 7% for 5-7s, 44% vs. 17% for 8-11s, 48% vs. 16% for 12-15). Boys aged 3-4 are more likely than girls to watch cartoons/animations/ mini-movies or songs (85% vs. 74%) and boys aged 12-15 are more likely than girls to watch 'how to' videos or tutorials (59% vs. 42%).

There are three types of YouTube content that girls aged 12-15 are more likely than boys to watch: music videos (81% vs. 67%), vloggers (58% vs. 47%) and whole programmes or films (36% vs. 26%).

Figure 28: Types of content watched on the YouTube website or app, by age: 2018

All who use the YouTube website or app	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Base	282	1119	309	378	432
Funny videos/ jokes/ pranks/ challenges	40%	71%	61%	75%	74%
Music videos	25% ↓	61%	43%	58%	74%
Cartoons/ animations/ mini-movies or songs	80%	46%	65%	48%	34%
'How to' videos or tutorials about hobbies/ sports/ things they are interested in	17%	45% ↑	34%	46%	50% ↑
Vloggers or YouTube personalities	15% ↑	41% ↑	25% ↑	40%	52% ↑
Game tutorials/ walk-throughs/ watching other people play games	22% ↑	41%	33%	40%	47% ↑
Film trailers, clips of programmes, 'best-bits' or programme highlights	6%	32%	11%	32%	43%
Sports/ football clips or videos	6%	27%	14%	30%	33%
Whole programmes or films	17%	26% ↑	17%	26%	31%
'Unboxing' videos - e.g. where toys are unwrapped or assembled	27%	25% ↑	32% ↑	25%	21%

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.

Significance testing shows any change between 2017 and 2018.

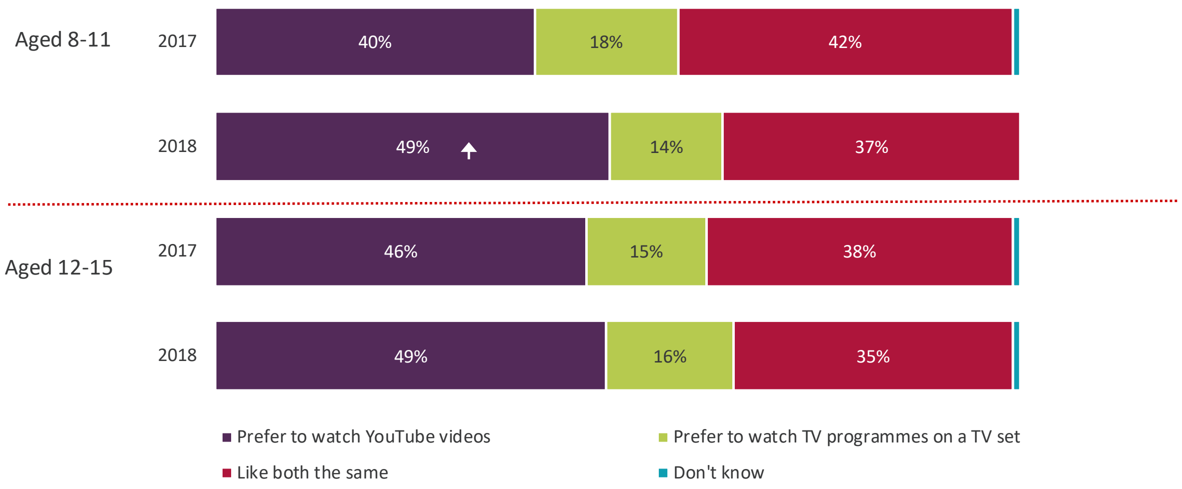
Half of 8-11s and 12-15s say they prefer to watch YouTube videos rather than watch TV programmes on a TV set

Children aged 8-15 who both use YouTube and watch television on a TV set (76% 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 29. Half of 8-11s (49%) and 12-15s (49%) who use YouTube and who also watch television on a TV set say they prefer to watch YouTube videos. This compares to one in seven 8-11s (14%) and one in six 12-15s (16%) who say they prefer to watch TV programmes on a TV set. The remainder in each age group say they like both equally.

Compared to 2017, 8-11s who use YouTube and who watch television on a TV set are more likely to say they prefer to watch YouTube videos (49% vs. 40%).

Figure 29: Preference for watching TV programmes on a TV set and YouTube videos, among 8-11s and 12-15s: 2017 and 2018



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 (357 aged 8-11 and 388 aged 12-15).

Significance testing shows any change between 2017 and 2018.

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

More than one in five 8-11s and 12-15s say there are not enough programmes for children their age

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 30 below.

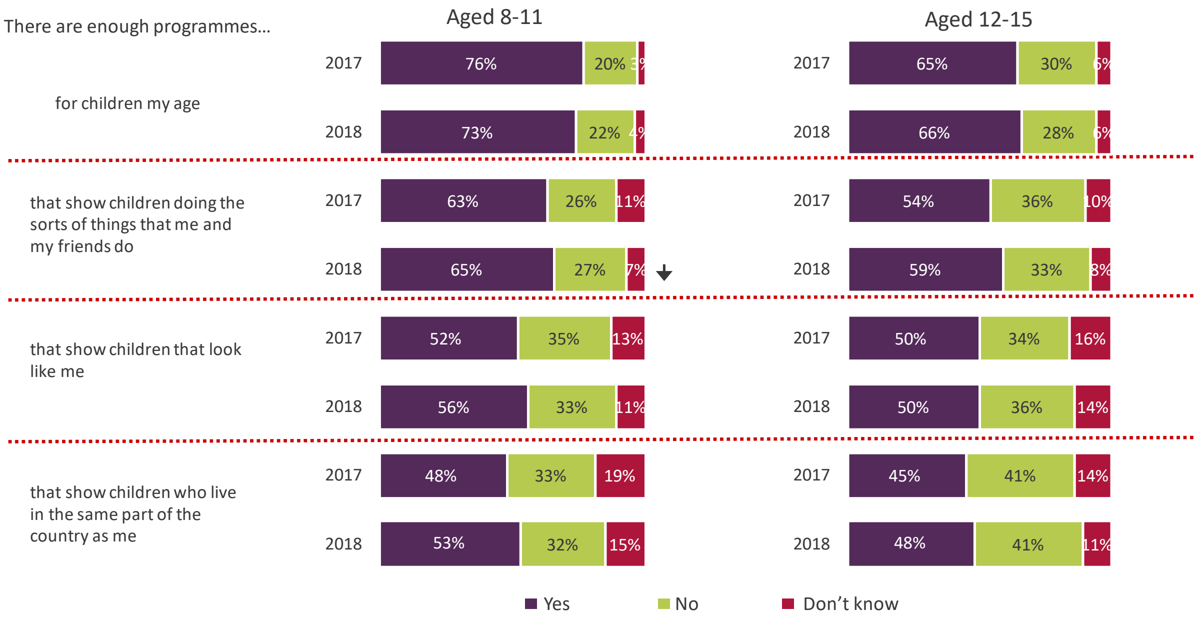
Close to three-quarters of 8-11s (73%) and two in three 12-15s (66%) feel there are enough programmes for children their age. About six in ten 8-11s (65%) and 12-15s (59%) feel that there are enough programmes that show children doing the sorts of things that they and their friends do.

At least half of 8-11s (56%) and 12-15s (50%) feel there are enough programmes that show children who look like them, while 53% of 8-11s and 48% of 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 (33%) or that live in the same part of the country as them (32%) 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%).

There has been no change in any of these measures since 2017.

Figure 30: Attitudes towards TV programmes among 8-15s: 2017 and 2018



QC4A1/B1/C1/D1 –I’m going to read out some things about the TV programmes that you watch. Which answer would you choose for each of the following? (prompted responses, single coded)

Base: Children aged 8-15 who watch TV at home or elsewhere (490 aged 8-11, 479 aged 12-15).

Significance testing shows any change between 2017 and 2018.

Children aged 8-15 are most likely to say it is important to watch things that include children their age, or that show children doing the same sorts of things that they do

In 2018[35], children aged 8-15 were also asked: “How important is it to watch things that are for children your age/ that show children that look like you/ that show children who live in the same part of the country as you/ that show children doing the sorts of things that you and your friends do?”. For each of these four questions, children could select important, not important, neither/ nor, or that they were unsure. The results are shown in Figure 31.

More than half of 8-11s (68%) and 12-15s (54%) say it is important to watch things that are for children of their age, and a majority of 8-11s (60%) and 12-15s (52%) also say that it is important to watch things that show children doing the sorts of things that they and their friends do.

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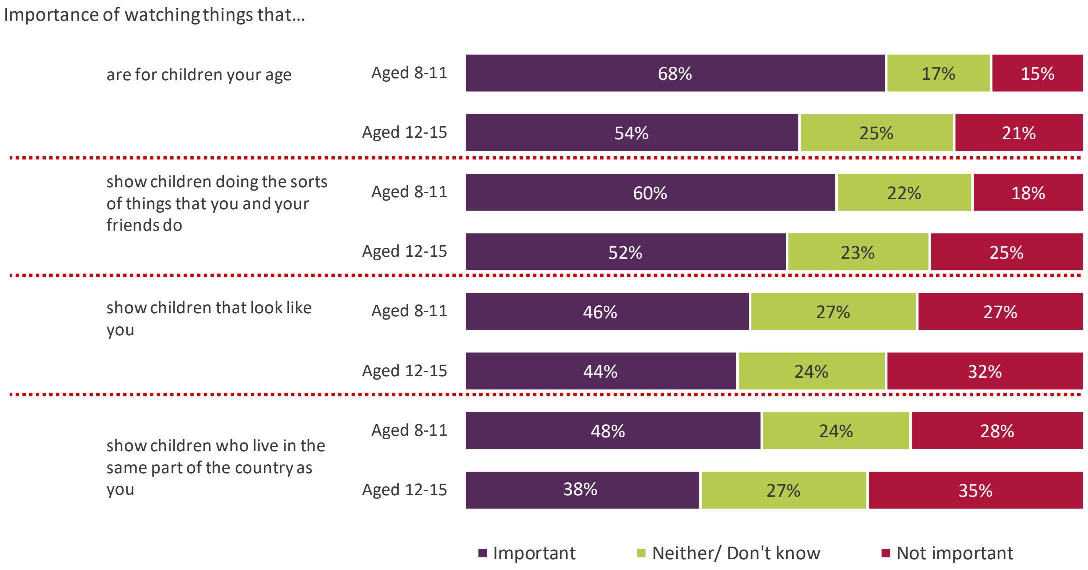
[35] In 2017, similar questions were asked of children aged 12-15 on the online rather than the face-to-face survey. The results in some instances differ to those shown here, which could be attributable to the differences in the question wording and/or due to the survey methodology. As such, we have not shown the results from 2017 in the above Figure.

Girls aged 12-15 are more likely than boys to say it is important that TV programmes show children that look like them (52% vs. 36%).

While three in ten 8-15s (31%) say it is ‘not important’ that TV programmes show children that live in the same part of the country as them, this increases to 39% among children aged 8-15 in AB households.

Figure 31: Importance of viewing various types of content, among 8-15s: 2018



QC4A2/B2/C2/D2 –I’m going to read out some more things about the TV programmes that you watch. Which answer would you choose for each of the following? (prompted responses, single coded)

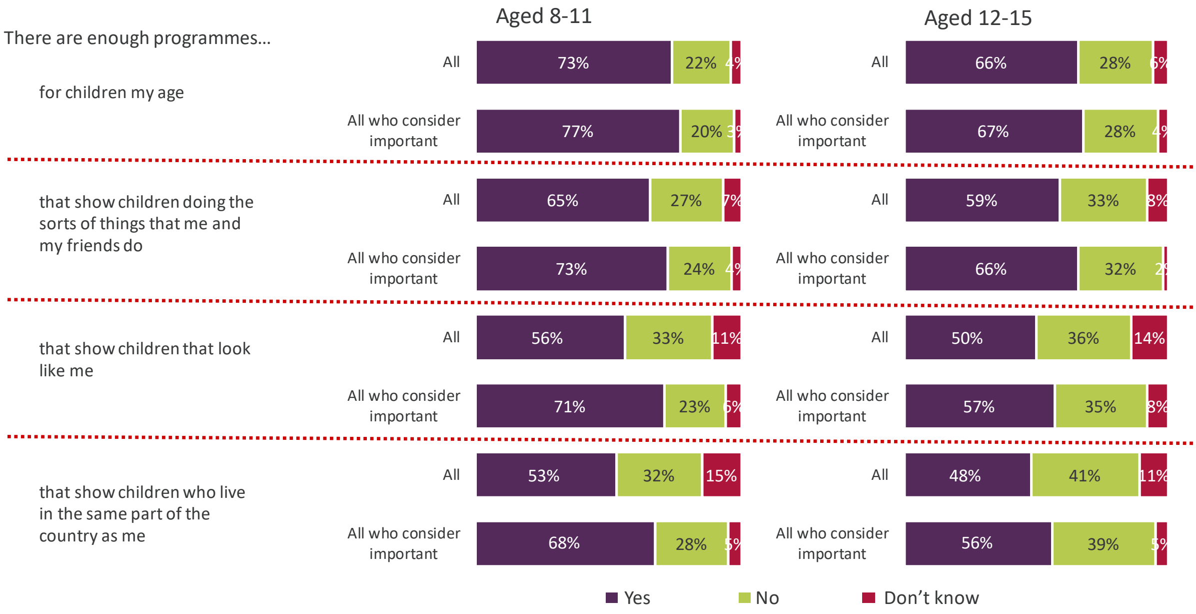
Base: Children aged 8-15 who watch TV at home or elsewhere (490 aged 8-11, 479 aged 12-15).

Figure 32 shows again the responses from 8-11s and 12-15s about whether there are enough of each type of programme (as discussed earlier at Figure 30) and also shows the responses among those children in each age group who say it is important that TV programmes meet each of these criteria (from Figure 31).

Most of the children in each age group who consider it important that TV programmes meet each of the four criteria shown in Figure 32 feel that there are enough programmes of each type.

Among 8-11s in particular, those who consider representation in TV programmes to be important are more likely than 8-11s overall to feel that there are enough of this type of TV programme.

Figure 32: Attitudes towards TV programmes among 8-15s overall, compared to those who consider it important to view each type of content: 2018



QC4A1/B1/C1/D1 –I'm going to read out some things about the TV programmes that you watch. Which answer would you choose for each of the following? (prompted responses, single coded)

Base: Children aged 8-15 who watch TV at home or elsewhere and among those who consider each type of content important (variable base).

A5. Social media, live streaming and gaming

This section looks in more detail at children’s use of the internet for social media, along with awareness and use of live streaming among 12-15s. It concludes by looking at children’s experience of playing games online.

Key findings

- When expressed as a proportion of all children, as opposed to all who go online, 1% of 3-4s, 4% of 5-7s, 18% of 8-11s and 69% of 12-15s have a profile on a social media or messaging site or app. None of these measures have changed since 2017. The only gender difference is among 8-11s, where girls are more likely than boys to have a profile on a social media or messaging site or app (25% vs. 15%).
- Among those with a profile on a social media/ messaging site or app, 12-15s are more likely than in 2017 to use Instagram (65% vs. 47%) and WhatsApp (43% vs. 32%).
- While Facebook remains the most-used social media/messaging site or app among 12-15s with a social media profile (72%), a lower proportion of this group than in 2017 nominate it as their main site or app (31% vs. 40%). Nearly a quarter nominate Instagram as their main site or app, up from 14% in 2017. Boys aged 12-15 are more likely than girls to nominate Instagram as their main site or app (29% vs. 18%).
- More than three-quarters (78%) of 12-15s who go online have heard of live streaming services such as Facebook Live or YouTube Live. Close to one in five (18%) have personally shared videos using a live streaming service, up from 10% in 2017. One third (35%) have not shared content but have watched live streams.
- One in eight (13%) of all 3-4s, three in ten of all 5-7s (31%), 58% of five 8-11s and 66% of 12-15s play games online. Compared to 2017, 5-7s are more likely to play games online (31% vs. 24%).
- Among those who play online games, one in ten 8-11s and a quarter of 12-15s say they use chat features within the game to talk to people they only know through the game.

Using social media and live streaming

Seven in ten 12-15s have a social media profile, unchanged since 2017

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[36] 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 33, very few parents of children aged 3-4 (2%) or 5-7 (5%) who go online say their child has a profile on these sites/ apps. This rises to 20% of 8-11s and 70% of 12-15s who go online. Measures for each age group are unchanged since 2017.

When rebased to report on all children (as opposed to those who go online, as shown in Figure 33), 1% of 3-4s and 33% of 5-15s have a social media profile, also unchanged since 2017. This overall figure among all 5-15s breaks out by age as follows: 4% of 5-7s, 18% of 8-11s and 69% of 12-15s.

The only difference by gender within age is among 8-11s: girls who go online are more likely than boys to have a profile on a social media site or messaging app (25% vs. 15%). When re-based on all children, these figures are 22% and 14% respectively.

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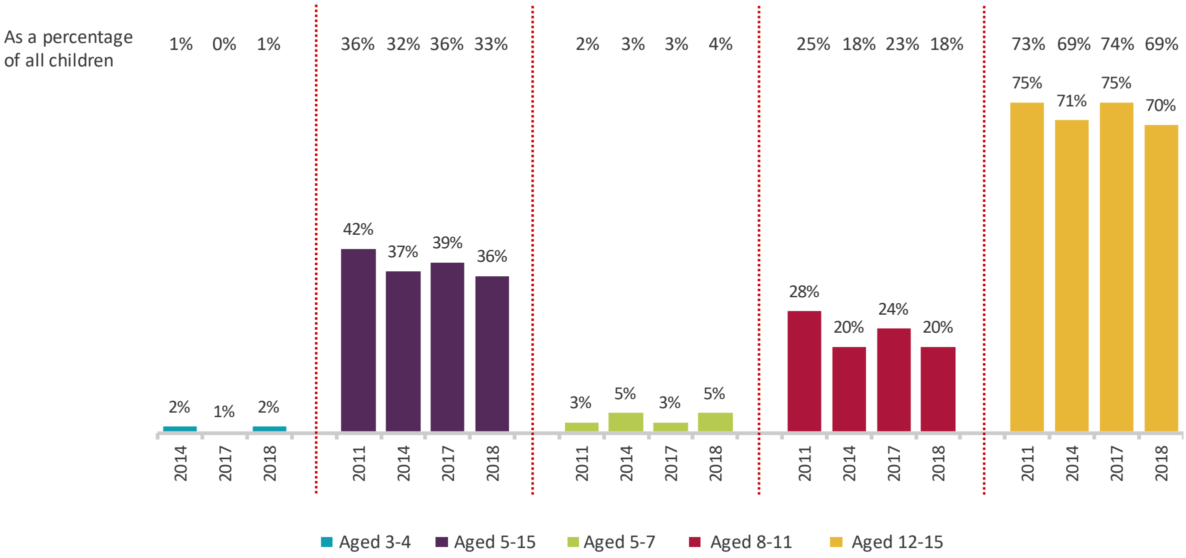
[36] I’d now like to ask you some questions about your (child’s) use of social media or messaging sites or apps* - so websites or apps like Facebook, Twitter, Instagram, Tumblr, Snapchat, WhatsApp and some activities on YouTube. Does your child/do you have a profile or account on any of these types of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

Figure 33: Children who go online and have a profile on a social media/ messaging site or app, by age: 2011, 2014, 2017, 2018



QP43/ QC19 – I'd now like to ask you some questions about your child's use of social media or messaging sites or apps - so websites or apps like Facebook, Twitter, Instagram, 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 the child aged 8-11 or 12-15 rather than the parent.*

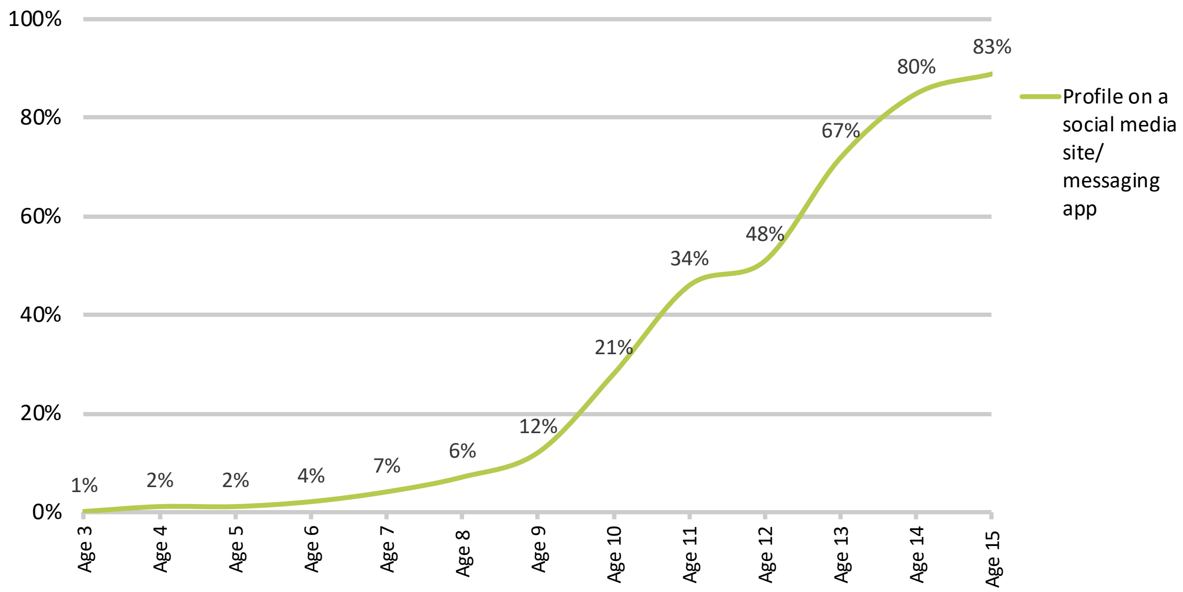
** Before 2017 this question asked only about use of social media sites or apps; this definition was expanded in 2017 to include messaging sites or apps.*

Base: Parents whose child ever goes online aged 3-4 (328) or 5-15 (1298 aged 5-15, 362 aged 5-7, 456 aged 8-11, 480 aged 12-15).

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

Figure 34 shows the incidence of having a profile on a social media site or messaging app 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 profile; the incidence increases so that by age 10, one in five have a profile and 48% by age 12. From 13 onwards, two-thirds (or more) of children have a profile. More than four in five (83%) children aged 15 have a profile on a social media site or messaging app.

Figure 34: Incidence of having a profile on a social media site or messaging app, by age: 2018



QP43/ QC19 – I'd now like to ask you some questions about your child's use of social media or messaging sites or apps - so websites or apps like Facebook, Twitter, Instagram, 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 5-7 year-olds and from children aged 8-15.*

Base: Parents of children aged 3-4 or 5-15 (325 aged 3, 305 aged 4, 180 aged 5, 147 aged 6, 121 aged 7, 181 aged 8, 107 aged 9, 117 aged 10, 92 aged 11, 171 aged 12, 112 aged 13, 96 aged 14, 106 aged 15).

Among 12-15s Facebook remains most popular social media site or app, although use of Instagram and WhatsApp has increased since 2017.

Parents of children aged 3-7 and children aged 8-15 with a profile on a social media site/ messaging app 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 used by younger children[37]. In 2018, 14% of all children aged 3-12 have a profile on a social media site or messaging app, and this is unchanged compared to 2017 (15%).

Figure 35 shows the social media sites or apps used by children aged 12-15[38] with a profile on a social media site/ messaging app. As shown, the top five social media/messaging sites or apps

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[37] The minimum age for having a profile on Facebook, Instagram, Snapchat, YouTube, Twitter and Google+ is 13. The minimum age for having a profile on WhatsApp in Europe was raised from 13 to 16 in April 2018. See https://www.net-aware.org.uk/networks/?order=-popularity

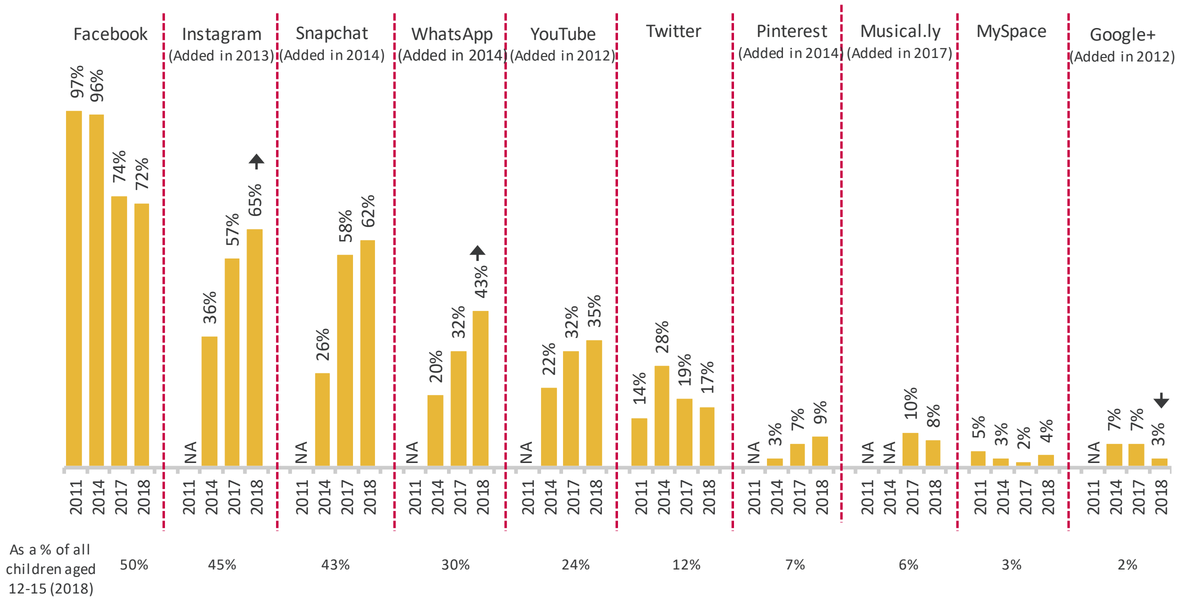
[38] There are too few social media users aged 3-4, 5-7 or 8-11 to look at the sites or apps used in more detail.

remain Facebook[39] (72%), Instagram (65%, up from 57% in 2017), Snapchat (62%), WhatsApp (43%, up from 32% in 2017) and YouTube (35%).

Nine per cent of 12-15s use Pinterest: this is more likely among girls (15%) than boys (3%). Girls are also more likely than boys to use Musical.ly (14% vs. 1%).

Children aged 5-15 in C2DE households are more likely than those in ABC1 households to say they use Facebook (69% vs. 57%).

Figure 35: Social media sites or apps used by children aged 12-15: 2011, 2014, 2017 and 2018



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 asked only about use of social media sites or apps; the 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 (322). Significance testing shows any change between 2017 and 2018.

Close to a quarter of 12-15s name Instagram as their main profile

As shown in Figure 36, in 2018, as in 2017, no single social media or messaging site or app is named as the main site or app by a majority of 12-15s[40] with a profile.

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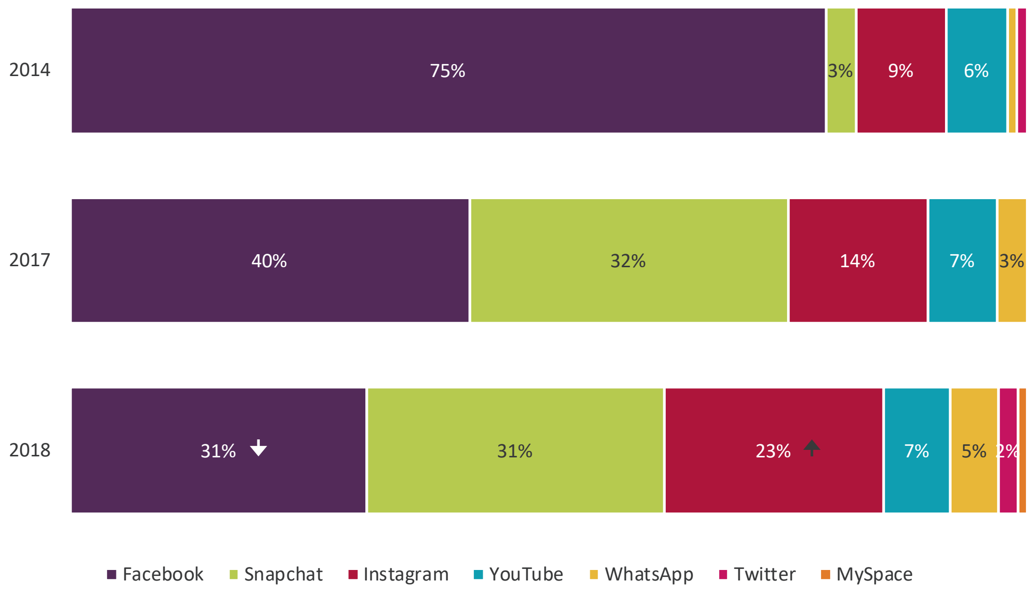
[39] Since 2016, Facebook Messenger (28% in 2017, 24% in 2018) was recorded separately to Facebook (73% in 2017, 71% in 2018) with the results combined to get an overall incidence for those 12-15s with a profile on Facebook (74% in 2017 and 72% in 2018).

[40] 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.

Three in ten 12-15s (31%) nominate Facebook as their main site/ app; this is less likely than in 2017 (40%). An identical proportion of 12-15s nominate Snapchat as their main social media site or app. Fewer mention Instagram (23%), although this is more likely than in 2017 (14%).

Boys aged 12-15 are more likely than girls to say that Instagram is their main social media or messaging site/ app (29% vs. 18%). Among 5-15s overall, Facebook is more likely to be nominated by those in C2DE households (31% vs. 23% in ABC1 households) while 5-15s in ABC1 households are more likely to nominate Snapchat (34% vs. 23% in C2DE households).

Figure 36: Main social media sites or apps used by children aged 12-15: 2014, 2017 and 2018



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

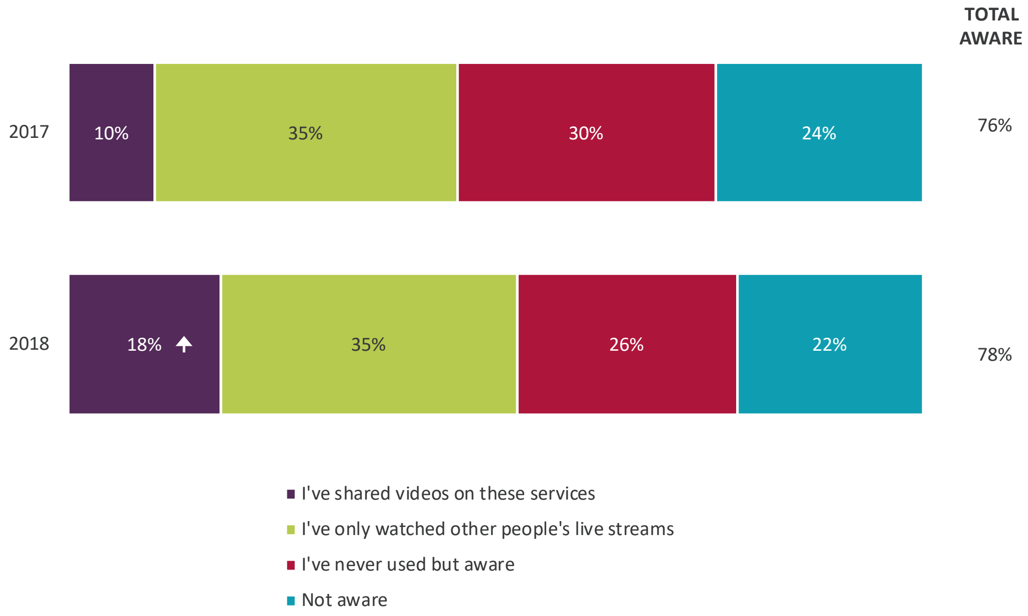
Base: Children aged 12-15 who have a social media or messaging site app profile (322). Significance testing shows any change between 2017 and 2018

Use of live streaming video services has increased since last year for 12-15s who go online, and is now at nearly one in five

Since 2017 we have asked 12-15 year-olds who go online some questions about live streaming services[41] such as Facebook Live, YouTube Live and 'Live' on Instagram Stories. 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 37, close to four in five (78%) of 12-15s who go online are aware of live streaming, unchanged since last year. Close to two in five (18%) have experience of sharing videos using live streaming; this is almost twice as likely as last year (10%). One-third have not posted content but have watched other people's live streams, and a quarter have never used them at all.

Figure 37: Awareness and use of live streaming services among 12-15s who go online: 2017, 2018



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 'Live' on Instagram Stories. 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 (480). Significance testing shows any change between 2017 and 2018.

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[41] The question to establish awareness was "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 'Live' on Instagram Stories. Before today, had you heard about live streaming?"

Playing games online

One in eight of all 3-4s and more than 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 were prompted with a description of online gaming[42] and were asked if their child/ they ever played online games. Figure 38 shows the incidence of online gaming across the different age groups in 2017 and 2018.

Among those who play games, three-quarters of 5-15s ever play games online; up from two-thirds in 2017. The incidence of online gaming increases with age, ranging from 37% for 3-4s to 87% for 12-15s. Since last year this incidence is unchanged for 3-4s but has increased for all other age groups.

When rebased to report on all children (as opposed to those who play games on any type of device), 13% of 3-4s, three in ten 5-7s (31%), close to three in five 8-11s (58%) and two-thirds of 12-15s (66%) play games online. Compared to last year, this represents an increase for 5-7s (31% vs. 24%) but does not represent a statistically significant increase for 3-4s, 8-11s or 12-15s.

Boys who play games in each age group from 5 to 15 are more likely than girls to play games online: 56% vs. 40% for 5-7s, 84% vs. 68% for 8-11s, 95% vs. 76% for 12-15s.

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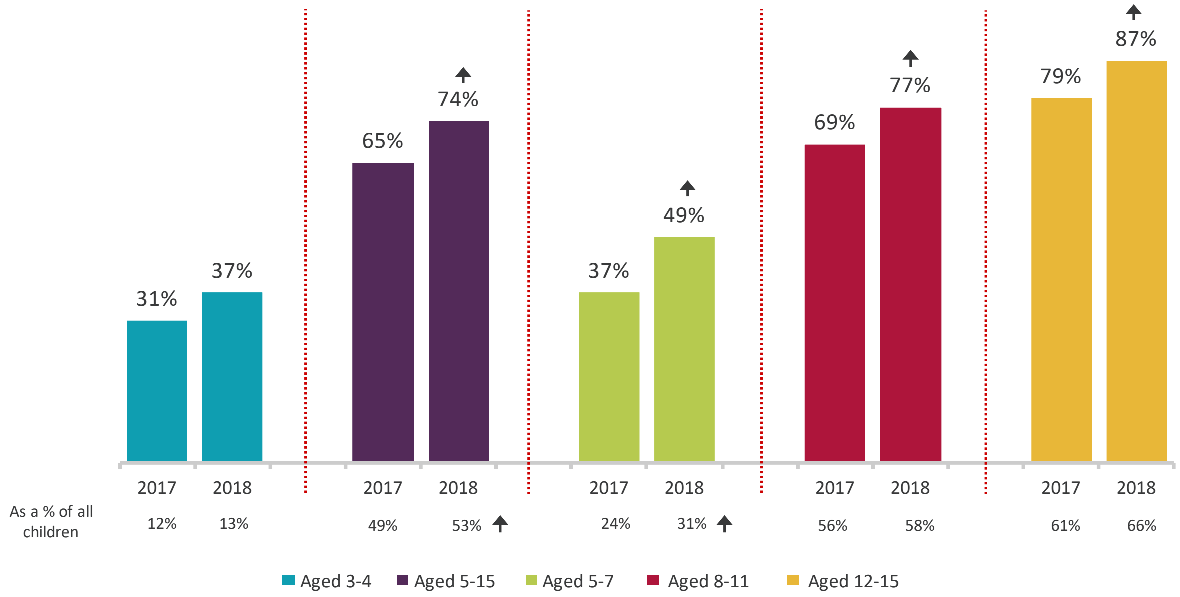
[42] Many games can now be played online, either through games consoles, other games players or through other devices such as desktop computers, laptops, tablets, mobile phones and smart TVs. Examples of popular games that can be played online include FIFA football games, Minecraft, Animal Jam, Stardoll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

Figure 38: Incidence of online gaming, by age: 2017 and 2018



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 you are playing? (prompted response, multi coded). Responses from parent of 3-7s and from children aged 8-15.

Base: Parents of children aged 3-7 whose child plays games and children aged 8-15 who ever play games (228 aged 3-4, 1015 aged 5-15, 277 aged 5-7, 369 aged 8-11, 369 aged 12-15).

Significance testing shows any change between 2017 and 2018.

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

To get a sense of with whom children are playing online games, we asked parents of younger children and older children themselves about a range of different ways in which they might play online games (Figure 39). 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 39, 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 34% of 3-4s who play games and 63% of 5-15s who play games (up from 51% in 2017).

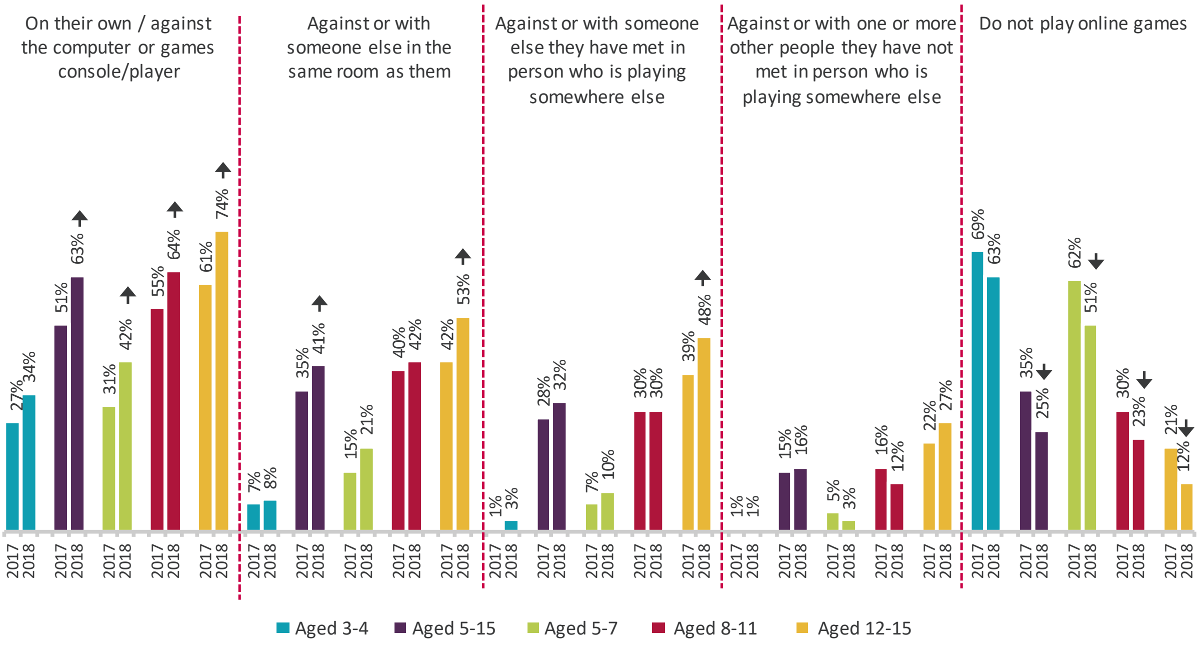
Few children aged 3-4 who play games play online with or against someone else in the same room, or with someone else they know who is playing elsewhere. Playing in either of these ways increases with the age of the child: two in five 5-15s (41%) play with or against someone else in the same room, and 32% of 5-15s play with or against someone they know who is playing somewhere else. For 5-7s and 8-11s, playing with or against someone else in the same room is more likely than playing with or against someone else they know who is playing elsewhere, while 12-15s are equally likely to play in each of these ways. Compared to last year, 12-15s are more likely to play in each of these ways.

Looking specifically at playing online with or against one or more people the children have not met in person, who are playing elsewhere, this type of online gaming is ever undertaken by 1% of 3-4s, 3% of 5-7s, 12% of 8-11s and more than a quarter of 12-15s (27%) who play games at all. When this is re-based to report on all children, as opposed to those who play games, it represents 0% of all 3-4s, 2% of all 5-7s, 9% of all 8-11s and 20% of all 12-15s.

Compared to the average (41%), children aged 5-15 in C1 households are more likely to play with or against someone else in the same room as them (48%).

As shown in Figure 40, there are no differences by gender in the ways in which 3-4s who play games play online. Boys aged 5-7 are more likely than girls to play in two of the ways shown, boys aged 8-11 are more likely to play in three of the ways and 12-15s are more likely to play in all four ways.

Figure 39: Types of online gaming undertaken by children at home or elsewhere, by age: 2017, 2018

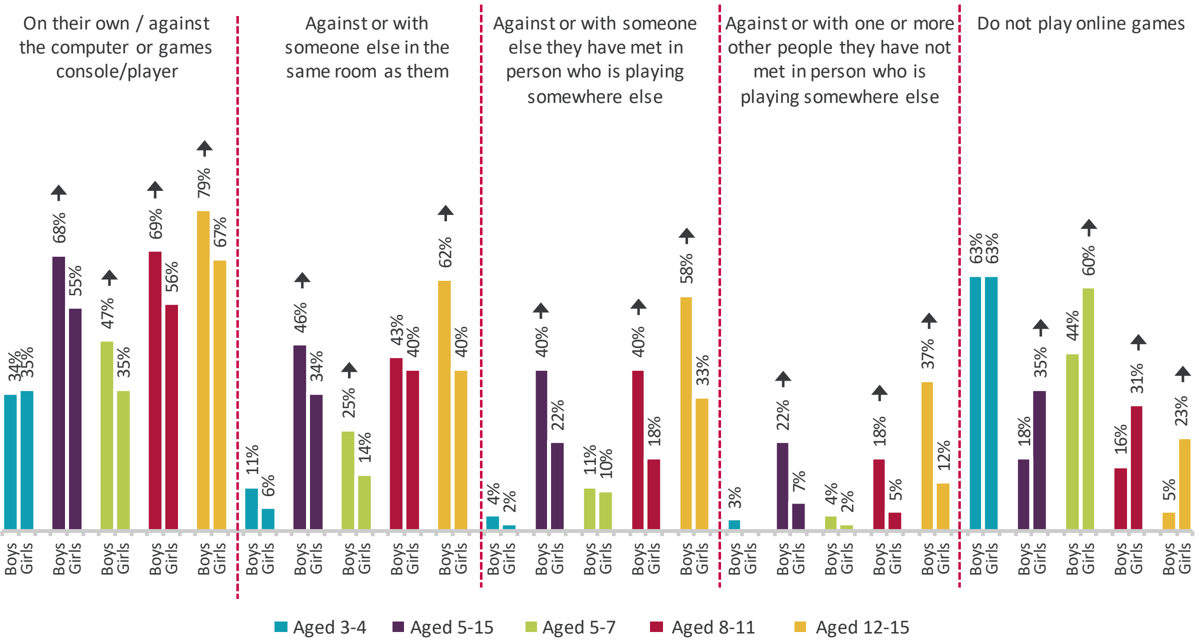


QP70/ QC42. Many games can now be played online, either through games consoles, other games players or through other things like computers, laptops, tablets, mobile phones and smart TVs. Examples of popular games that can be played online include FIFA football games, Minecraft, Club Penguin, Animal Jam, 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 parents of 3-7s and from children aged 8-15.

Base: Parents of children aged 3-7 whose child plays games, and children aged 8-15 who ever play games (228 aged 3-4, 1015 aged 5-15, 277 aged 5-7, 369 aged 8-11, 369 aged 12-15).

Significance testing shows any change between 2017 and 2018.

Figure 40: Types of online gaming undertaken by children at home or elsewhere, by gender and age: 2018



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 you are playing? (prompted response, multi coded). Responses from parents of 3-7s and from children aged 8-15.

Base: Parents of children aged 3-7 whose child plays games and children aged 8-15 who ever play games (117 boys aged 3-4, 111 girls aged 3-4, 588 boys aged 5-15, 427 girls aged 5-15, 158 boys aged 5-7, 119 girls aged 5-7, 205 boys aged 8-11, 164 girls aged 8-11, 225 boys aged 12-15, 144 girls aged 12-15). Significance testing shows any difference by gender.

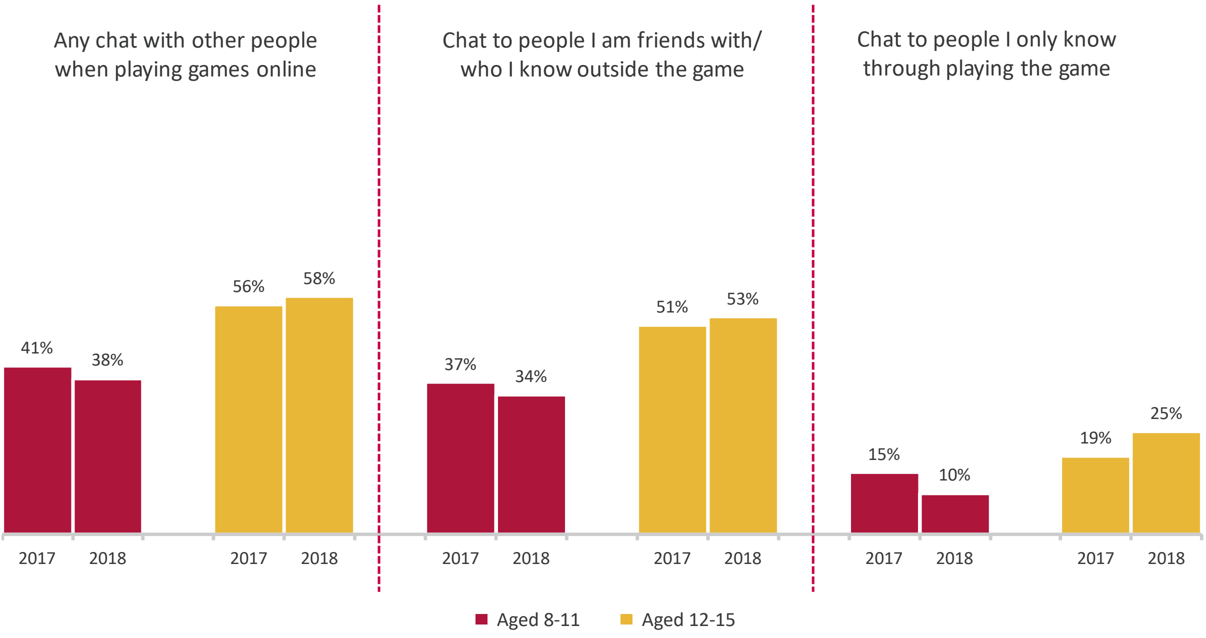
A quarter of online games players aged 12-15 chat via the game to players they don't know

Children aged 8-11 and 12-15 who ever play games online (58% of 8-11s and 66% of 12-15s) were asked about their use of chat features when playing games online. As shown in Figure 41, close to two in five 8-11s (38%) and three in five 12-15s (58%) ever chat with other people when playing games online, unchanged since 2017.

As in 2017, players of online games are more than twice as likely to chat through the game to people they already know outside the game (34% 8-11s, 53% 12-15s) than they are to chat to people they know only through playing the game (10% 8-11s, 25% 12-15s).

Boys aged 8-11 and 12-15 who play games online are more likely than girls to say they ever chat with other people when playing games online (44% vs. 29% for 8-11s and 66% vs. 42% for 12-15s). Boys aged 12-15 who play games online are twice as likely as girls to say they chat to people they know only through playing the game (30% vs. 16%).

Figure 41: Use of chat features when playing games online: 2017 and 2018



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 (281 aged 8-11, 321 aged 12-15).

A6. Children's media attitudes and experiences

This section looks at older children's attitudes (mostly among those aged 12-15) to their online environment. It explores:

- 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;
- children's attitudes towards the internet in terms of their perceptions of whether it is important to protect users from hurtful comments online;
- the issue of online media potentially being used to portray an idealised or 'rose-tinted' version of their life;
- children's perception of the pressure to appear popular on social media or messaging sites or apps, and the extent to which social media users feel that people are mean to each other;
- some of the positive aspects to social media use, such as the extent to which users say that social media makes them feel happy and the extent to which it can help them feel closer to their friends;
- the activities undertaken on social media sites/ messaging apps, with a particular focus on civic participation online among 12-15 year-olds, and creative activities undertaken online by 3-15 year olds; and
- the use of BBC resources for education purposes among 3-4s and 5-15s.

Key findings

- In 2018, more than a third of 12-15s agree (35%) that they find it hard to control their screen time, lower than the four in ten (41%) that disagree. However, agreement has increased among 12-15s since 2017 (35% vs. 27% in 2017).
- Nearly two-thirds of 12-15s agree that they have a good balance between screen time and doing other things (63%); this measure is unchanged since last year.
- As in 2017, more than seven in ten 12-15s who go online (72%) feel there should be rules to prevent hurtful comments online. Girls aged 12-15 are more likely than boys to say this (77% vs. 67%).
- Just over half of 12-15s who go online (54%) agree that the images or videos that people post online make their life look more interesting than it is.

- Although 12-15s who use social media or messaging sites/ apps are aware of some of the negative associations (78% feel there is pressure to look popular, and 90% say that people are mean to each other on social media at least 'sometimes'), this is balanced by nine in ten who say that social media 'ever' makes them feel happy (91%) or 'ever' helps them feel closer to their friends (91%).
- Girls aged 12-15 with a social media or messaging site profile/ account are more likely than boys to feel there is pressure to look popular on social media 'all of the time' (20% vs. 11%).
- Children aged 8-15 in C2DE households with a profile or account on a social media or messaging site/ app are more likely than those in ABC1 households to feel there is pressure to look popular on social media 'most of the time' (32% vs. 23%). In contrast, those in ABC1 households are more likely to say this applies 'sometimes' (40% vs. 26%). Children aged 8-15 in C2DE households are also more likely than those in ABC1 households to say that people are mean to each other on social media 'most of the time' (27% vs. 17%).
- Two-thirds of 12-15s (67%) who use social media or messaging sites/ apps say they send supportive messages, comments or posts to friends if they are having a hard time, while three in ten (31%) share or discuss news stories with others. One in eight (12%) support causes or organisations by sharing or commenting on posts, and 8% say they sign petitions.
- Making pictures (43%), editing photos (42%) and making videos (40%) are the top three online creative activities that we asked about undertaken by 5-15s.
- CBeebies is used by 75% of 3-4 year-olds, and 88% of parents of CBeebies users in this age range rate these resources as being educational.
- BBC websites or apps are used for schoolwork or homework by 34% of 5-7s, 56% of 8-11s and 64% of 12-15s. At least four in five users (or their parents), ranging from 81% to 86%, agree that these resources are helpful. Children aged 8-11 are less likely than in 2017 to say they are helpful (81% vs. 89%).
- Girls aged 12-15 are more likely than boys to say they ever use BBC websites or apps for their schoolwork or homework (68% vs. 60%).
- Compared to the average for 8-15s (60%), use of BBC websites or apps such as BBC Bitesize for schoolwork or homework is more likely in AB households (70%) and less likely in DE households (53%). However, agreement among users aged 8-15 that these BBC websites or apps are helpful does not vary by socio-economic group.

Children's attitudes to screen time

Compared to last year, children aged 12-15 are more likely to say they find it hard to control their screen time

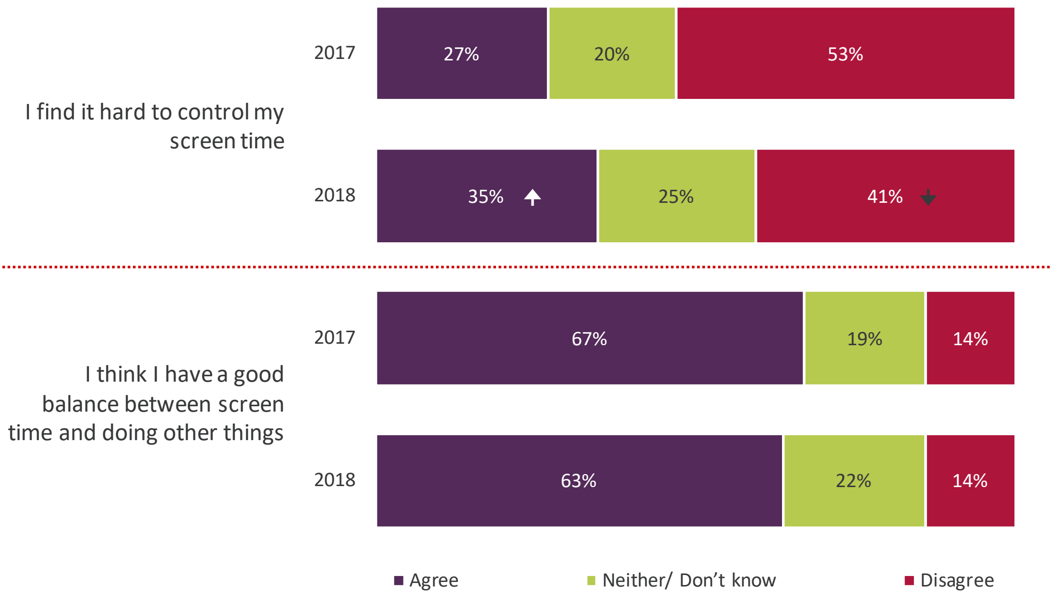
Since 2015, 12-15s have been asked about their attitudes towards their overall screen time. These questions are also asked of their parents. The parents' responses, and how these compare to the responses of their children, are set out in Section A10.

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.

Two in five 12-15s disagree that they find it hard to control their screen time (41%), higher than the one in three (35%) who agree with this statement. Children aged 12-15 are more likely than in 2017 to agree that they find it hard to control their screen time (35% vs. 27%).

When asked about the balance between screen time and doing other things, the scores are comparable to last year; more than three in five of 12-15s (63%) agree that they have a good balance and one in seven (14%) disagree.

Figure 42: Agreement with attitudinal statements about screen time among 12-15s: 2017, 2018



QC51A/B – 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 (485). Significance testing shows any change between 2017 and 2018.

Children's attitudes towards the internet

More than seven in ten 12-15s feel that there should be rules to prevent hurtful comments online, unchanged since last year

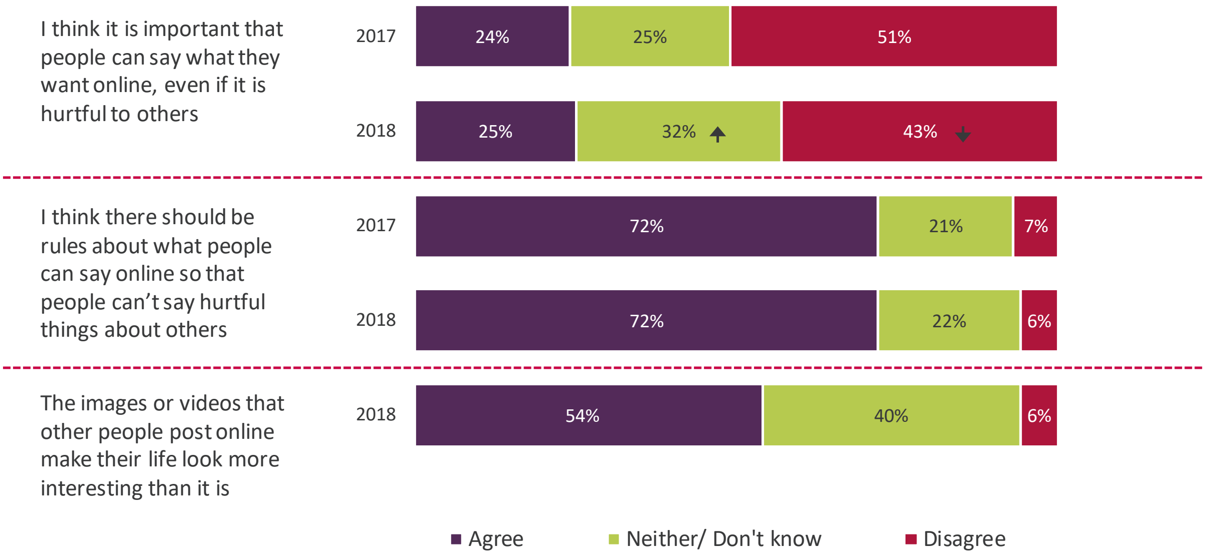
In 2017, we added statements to our research to assess the extent to which children felt that people should be able to say whatever they liked online, or whether they felt there should be rules about what is and is not acceptable. In 2018, one further statement: "The images or videos that other people post online make their life look more interesting than it is" was included in order to assess the extent to which children are aware that content posted online by an individual (such as photos or videos) may have been carefully curated. The responses from 12-15s are shown in Figure 43.

More than two in five 12-15s who go online (43%) disagree with the statement: "I think it is important that people can say what they want online, even if it is hurtful to others"; while just 25% agree, comparable to last year.

Close to three-quarters of 12-15s who go online (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 just 6% disagree. Each of these incidences is unchanged since last year. Girls in this group are more likely than boys to agree with the statement (77% vs. 67%).

Just over half of 12-15s (54%) agree that "The images or videos that other people post online make their life look more interesting than it is" while less than one in ten (6%) disagree.

Figure 43: Agreement among 12-15s who go online with statements about being online: 2017, 2018



QC38A-C– 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 (480). Significance testing shows any change between 2017 and 2018.

A quarter of 12-15s on social media say it helps them to feel closer to their friends 'all the time'

Since 2017, children aged 8-15[43] with a profile or account on a social media or messaging site/ app have been 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"

In 2018, we added two further statements to reflect the potential benefits of using social media:

- "Using social media makes me feel happy"
- "Using social media helps me feel closer to my friends"

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[43] The base for children aged 8-11 with a social media profile/ account is too low to report on (79 interviews).

The respondents were 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 which best described their thoughts about each statement. The results for all four statements are shown in Figure 44.

One third of 12-15s with a social media profile or account (34%) feel there is 'sometimes' pressure to look popular on social media and 28% say this applies 'most of the time'.

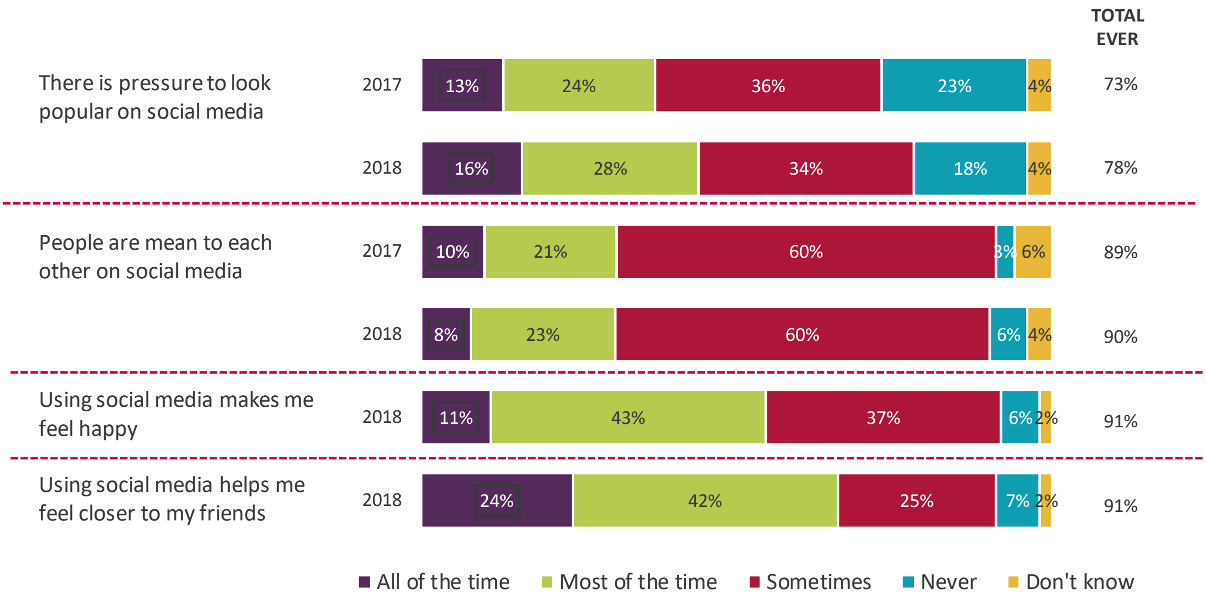
A majority of 12-15s with a social media profile or account (60%) say that people are mean to each on social media 'sometimes', and more than one in five (23%) say this is the case 'most of the time'.

Nine in ten 12-15s (91%) say that using social media 'ever' makes them feel happy, and an identical proportion (91%) say that it 'ever' helps them feel closer to their friends. More than two in five say that using social media makes them feel happy 'most of the time' (43%) and a similar proportion (42%) say it makes them feel closer to their friends 'most of the time'. While 11% of 12-15s (11%) say that using social media makes them feel happy 'all of the time', this group are more likely to say that social media helps them to feel closer to their friends 'all of the time' (24%).

Girls aged 12-15 with a profile or account on a social media or messaging site/ app are as likely as boys to say there is 'ever' pressure to appear popular on social media; they are, however, more likely than boys to say they feel there is pressure to appear popular 'all of the time' (20% vs. 11%). Girls aged 12-15 are also more likely than boys to say they that using social media helps them feel closer to their friends 'all of the time' (30% vs. 18%).

Children aged 8-15 in C2DE households are more likely than those in ABC1 households to feel that there is pressure to look popular on social media 'most of the time' (32% vs. 23%). In contrast, those in ABC1 households are more likely to say this applies 'sometimes' (40% vs. 26%). Children aged 8-15 in C2DE households are also more likely than those in ABC1 households to say that people are mean to each other on social media 'most of the time' (27% vs. 17%).

Figure 44: Agreement among 12-15s with a social media profile with statements about social media: 2017, 2018



QC22A-D - I'm going to read out some things about social media. Which of these best describes what you think for each one? (prompted responses, single coded)

Base: Children aged 12-15 with a social media profile or account (322).

Activities undertaken on social media sites/ messaging apps

Two-thirds of 12-15s say they use social media sites/ messaging apps to send supportive messages to their friends

In 2018, in order to better understand the perceived benefits of social media, 8-15s with a profile or account on a social media or messaging site/ app were prompted with seven options and were asked the following question: "Here is a list of things you may do on social media sites or messaging apps, which if any of them do you ever do?". The seven options that children were prompted with included some general social media activities and some that might be seen as civic activities. The results are shown for 12-15s[44] in Figure 45.

Overall, more than nine in ten (93%) ever did any of the things we asked about. Three activities were undertaken by most 12-15s: seeing what friends are doing/ liking or commenting on their posts or photos (88%), sending supportive messages, comments or posts to friends if they are having a hard time (67%) and looking at what famous people are doing/ following celebrities or YouTubers (56%).

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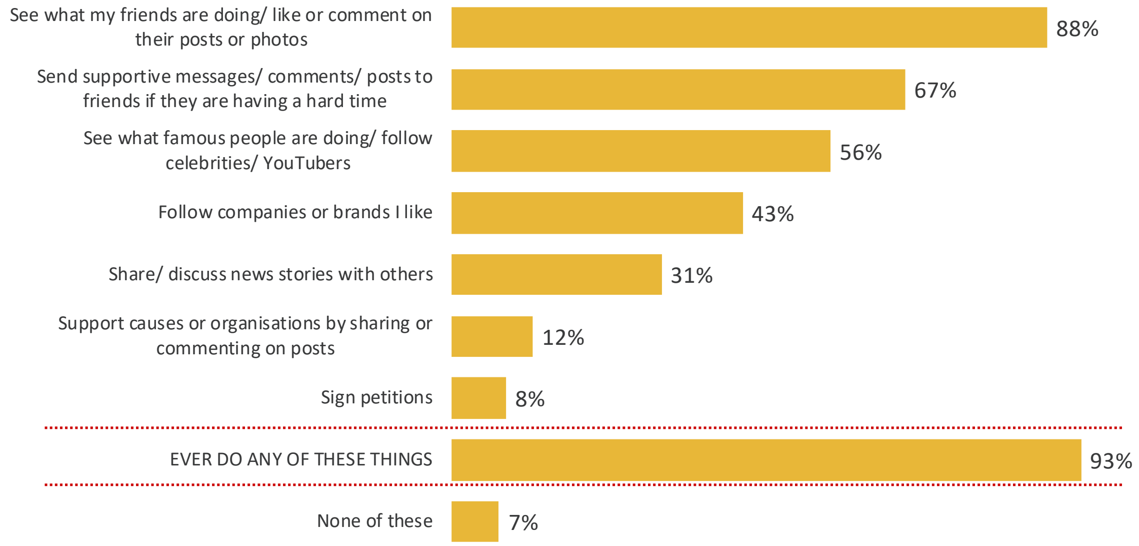
[44] The base for children aged 8-11 with a social media profile/ account is too low to report on (79 interviews).

Girls aged 12-15 with a profile or account on a social media or messaging site/ app are more likely than boys to use these sites for two specific activities: sending supportive messages, comments or posts to friends if they are having a hard time (75% vs. 57%) and seeing what famous people are doing or following celebrities or YouTubers (63% vs. 50%).

Figure 45: Activities undertaken on social media sites/ messaging apps among 12-15s: 2018



QC23 – Here is a list of things you may do on social media sites or messaging apps, which if any of them do you ever do? (prompted responses, multi coded).

Base: Children aged 12-15 with a social media profile or account (322).

Online creative activities undertaken by children

Making drawings or pictures, editing or changing photos, and making videos, are the three most popular online creative activities among 5-15s

Parents of children aged 3-7 and children aged 8-15 who go online were prompted with 11 creative activities and asked which, if any, their child/ they had ever done using any type of internet-enabled device.[45]

Figure 46 shows that, as in 2017, no single creative activity from the list provided is undertaken by a majority of 3-4s or 5-15s overall. The likelihood of undertaking any of the 11 activities increases with the age of the child, ranging from a third of 3-4s who go online (33%) to more than four in five 12-15s (82%).

The most popular creative activity undertaken by 3-4s is making or drawing a picture (28%), while 5-15s are as likely to do this (43%) as they are to have changed or edited a photo (42%) or made a video (40%). Unlike children in younger age groups, the most popular creative activity undertaken by those aged 12-15 is changing or editing a photo (59%).

There have been no decreases since 2017 in the creative activities undertaken online, and several increases, as indicated by the upward arrows in Figure 46[46]. Broadly speaking, where increases since last year are apparent among 5-15s this is mostly attributable to 12-15s being more likely to have undertaken that activity; although 5-7s, 8-11s and 12-15s are all more likely to have made their own music. Compared to last year, children aged 3-4, 5-7 and 8-11 are more likely to have made a website.

Girls aged 5-7 and 8-11 who go online are more likely than boys of these ages to have changed or edited a photo (25% vs. 16% for 5-7s and 46% vs. 32% for 8-11s). Girls aged 8-11 are also more likely than boys to have made their own music (19% vs. 9%) while boys of this age are more likely to have made a meme or gif (12% vs. 7%). There is only one difference by gender among the oldest children: girls aged 12-15 are more likely than boys to have created an emoji using sites like Snapchat or Bitmoji (36% vs. 27%).

There is very little variation by household socio-economic group in the type of online creative activities undertaken. Compared to those in ABC1 households, children aged 3-4 in C2DE households are more likely to have created an emoji of themselves using sites like Snapchat or Bitmoji (5% vs. 1%). Compared to the average for 5-15s, those in C2 households are less likely to say they have made a meme or a gif (7% vs. 12%).

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[45] Defined as computers, tablets or mobile phones

[46] In 2017, respondents were given a choice of 14 activities to select from, rather than the 11 shown in 2018. This reduction may have contributed to the differences over time that are flagged in the Figure.

Figure 46: Online creative activities ever undertaken, by age: 2018

All who go online	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Base	328	1298	362	456	480
Make a drawing or picture	28%	43% ↑	43%	43%	44% ↑
Change or edit a photo	8%	42%	20%	39%	59%
Make a video	12%	40% ↑	30%	39%	47% ↑
Make a character or avatar that lives and plays in games/sites like Moshi Monsters, Minecraft	3%	19% ↑	9%	22%	22% ↑
Created an emoji of themselves using sites/ apps like Snapchat or Bitmoji (added in 2018)	3%	19%	3%	16%	31%
Make their own music	2%	15% ↑	8% ↑	14% ↑	20% ↑
Make a meme or gif (an image, video or piece of text that is funny that gets spread around online)	3% ↑	12% ↑	4%	9%	19% ↑
Make an animation, moving picture or image	1%	12%	5% ↑	12%	16%
Make a website	3% ↑	8% ↑	3% ↑	5% ↑	15%
Make an app or game	2%	8%	2%	7%	12% ↑
Change or edit somebody else's music (such as cutting, editing or mixing tracks)	1%	7% ↑	3%	5%	11%
ANY OF THESE	33%	70%	52%	68%	82%

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 3-7s and from children aged 8-15. Significance testing shows any change between 2017 and 2018.

Use of BBC educational resources

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

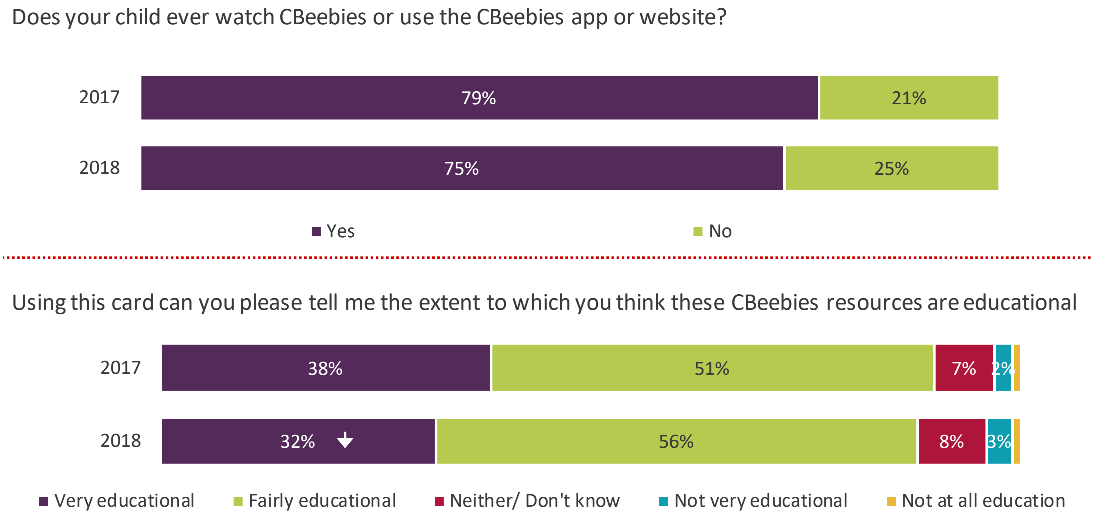
Since 2017, questions have been added to the study to understand whether children use BBC resources and the extent to which they or their parents consider these resources to be educational or helpful.

Three in four (75%) parents of children aged 3-4 say their child ever watches CBeebies or uses the CBeebies website or app, unchanged since 2017. Among parents of users, nine in ten (88%) rate the CBeebies resources as educational, with 32% saying it is 'very' educational. As shown in Figure 47, very few (4%) parents of CBeebies users rate the CBeebies resources as 'not very' or 'not at all' educational.

The proportion of parents of CBeebies users aged 3-4 who rate these resources as educational is unchanged since last year (88% vs. 89% in 2017). However, these parents are less likely to consider these resources to be 'very' educational (32% vs. 38% in 2017).

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 (91% vs. 85%).

Figure 47: Attitudes towards CBeebies among parents of 3-4s and among those whose child watches CBeebies TV, website or app: 2017, 2018



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 (630)/ Parents of children aged 3-4 whose child ever watches CBeebies or use the CBeebies app or website (472).

Significance testing shows any change between 2017 and 2018.

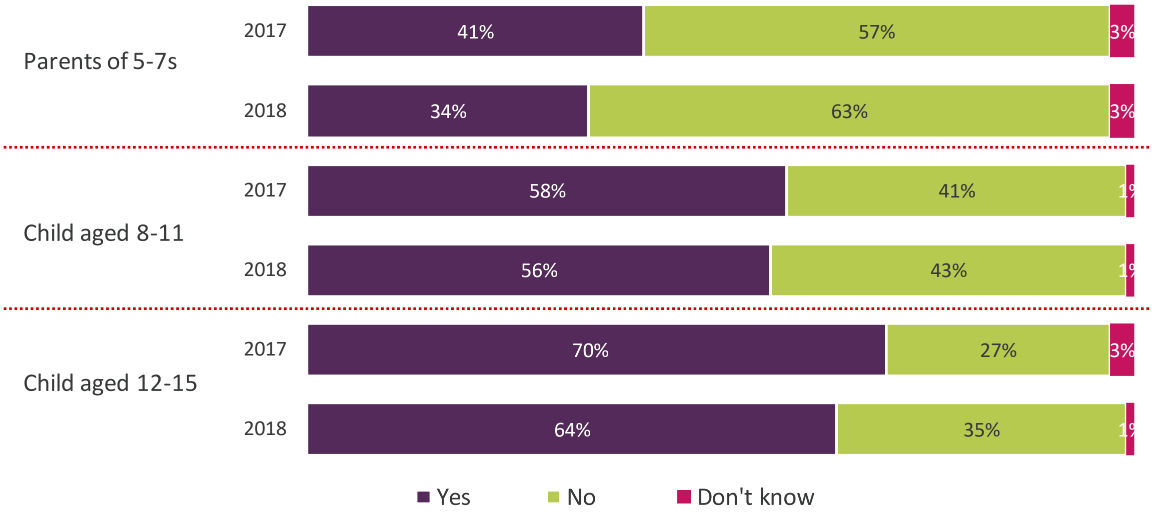
BBC websites and apps for schoolwork or homework are rated as helpful by around nine in ten parents of 5-7s and users aged 8-15

As shown in Figure 48, use of BBC websites, or apps such as Bitesize, for schoolwork or homework increases with the age of the child: from one in three (34%) for 5-7s, to more than half (56%) for 8-11s and close to two in three (67%) for 12-15s. Compared to 2017, use is unchanged for each of these age groups.

In 2018, girls aged 12-15 who go online are more likely than boys to say they ever use BBC websites or apps for their schoolwork or homework (68% vs. 60%).

The use of BBC websites or apps is less likely among 5-7s in C2DE households (29%) than among those in ABC1 households (40%). Compared to the average for 8-15s (60%), use of BBC websites or apps is more likely in AB households (70%) and less likely in DE households (53%).

Figure 48: Whether child uses BBC websites or apps for school work and homework: 2017, 2018

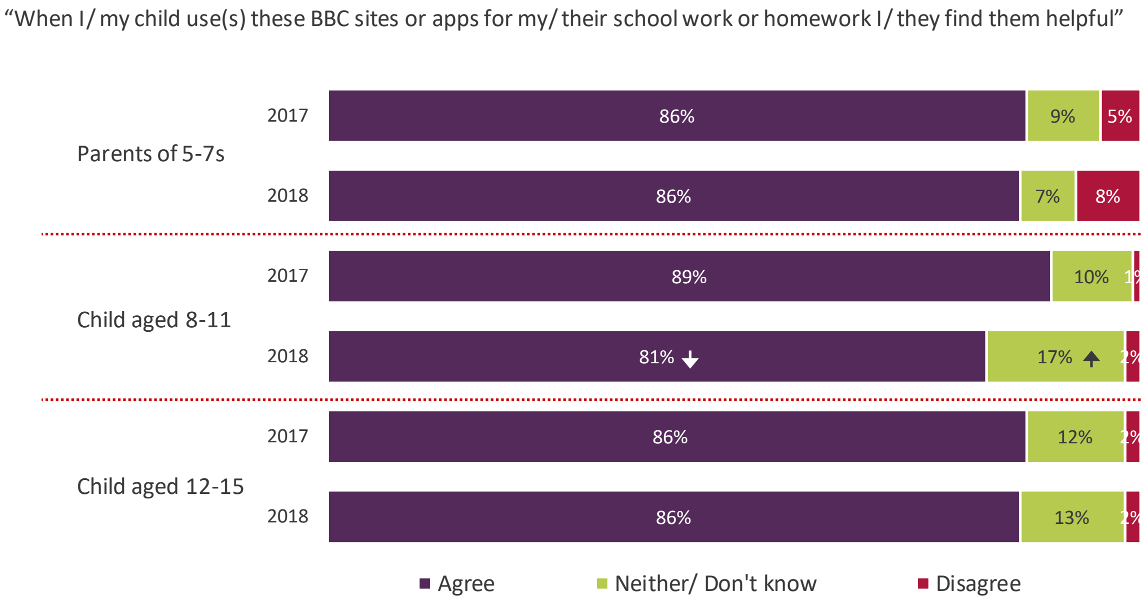


QP55B – Does your child ever use BBC websites or apps for their schoolwork or homework, so sites or apps like BBC Bitesize? (unprompted responses, single coded)/ QC39A - Do you ever use BBC websites or apps for your schoolwork or homework, so sites or apps like BBC Bitesize? (unprompted responses, single coded)

Base: Parents of children aged 5-7 whose child goes online (362)/ Children aged 8-15 who ever use BBC websites or apps (like BBC Bitesize) for their schoolwork or homework (251 aged 8-11, 307 aged 12-15). Significance testing shows any change between 2017 and 2018.

As shown in Figure 49, at least four in five users agree that these BBC resources are helpful, with similar responses from parents of users aged 5-7 (86%), and users aged 12-15 (86%); each of these incidences is unchanged since 2017. Users aged 8-11 are less likely than in 2017 to say that these resources are helpful (81% vs. 89%).

Figure 49: Whether BBC websites or apps for school work and homework are helpful: 2017, 2018



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). 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 and ever uses the BBC websites or apps (like BBC Bitesize) for their schoolwork or homework (119)/ Children aged 8-15 who ever use BBC websites or apps (like BBC Bitesize) for their schoolwork or homework (251 aged 8-11, 307 aged 12-15).

Significance testing shows any change between 2017 and 2018.

A7. Knowledge and understanding of media

This section addresses the extent to which older children (aged 8-15) understand their media environment. It explores:

- whether children visit websites that are new to them, and the ways in which they critically assess this content in terms of its truthfulness;
- whether children ever consider if the information they look for online can be trusted to be true or accurate. Search engine users are also asked the extent to which they trust the results returned by Google;
- whether children see advertising on TV or online and their attitudes towards the truthfulness of this advertising;
- children's understanding of how paid-for content appears in Google search results and their awareness of product endorsement by vloggers; and
- their understanding of how different media companies such as the BBC, YouTube and Google are funded.

Key findings

- Children aged 8-11 are more likely than 12-15s (60% vs. 49%) to say that in a typical week they only use websites or apps that they've used before.
- More than a third of internet users aged 12-15 (36%) would turn to Google first for accurate and true information about serious things going on in the world, more than any other source they were asked about, while YouTube is their preferred source for accurate and true information about creative activities (42%) and for fun things like hobbies and interests (38%). Compared to 2017, Google is more likely to be nominated by 12-15s as the source they would turn to first for serious content (36% vs. 27%) and for creative things (30% vs. 22%).
- Few users of social media sites/ apps believe that all the information on these sites is true (4% for 8-11s and 6% 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 25% of all 12-15s) and on news websites or apps (23% of 8-11s who use these sites and 17% of all 12-15s). Compared to 2017, social media users aged 12-15 are more likely to believe that all the information on these sites is true (6% vs. 2%), while users aged 8-11 are more likely to say that 'most' of the information on these sites is true (28% vs. 20%).
- Seven in ten internet users aged 12-15, who visit websites or apps they haven't used before, say they ever think about whether they can trust the information on these sites or apps to be true or accurate.

- At least half of 8-11s (50%) and 12-15s (55%) who use search engine websites are aware that some of the results returned by search engines can be trusted and some can't, although 12-15s' awareness is lower than in 2017 (62%). Three in ten users aged 8-11 and 12-15 believe that if a website is listed by a search engine it is trustworthy; for 12-15s this response is more likely than in 2017 (24%)
- Boys aged 8-15 who use search engine websites or apps are more likely than girls to feel that the results returned by a Google search can be trusted (34% vs. 28%) while girls of this age are more likely than boys to be aware that some results can be trusted, and some can't (56% vs. 48%).
- Although sponsored links are distinguished by a green box with the word 'Ad' in it, only a minority of 8-15s who use search engines (23% for 8-11s and 33% for 12-15s) correctly identified these links on Google as advertising and understood that this was the only reason these results appeared.
- Close to two in three internet users aged 12-15 (65%) are aware that vloggers may be being paid to endorse a product they say favourable things about, similar to last year.

Visiting new websites

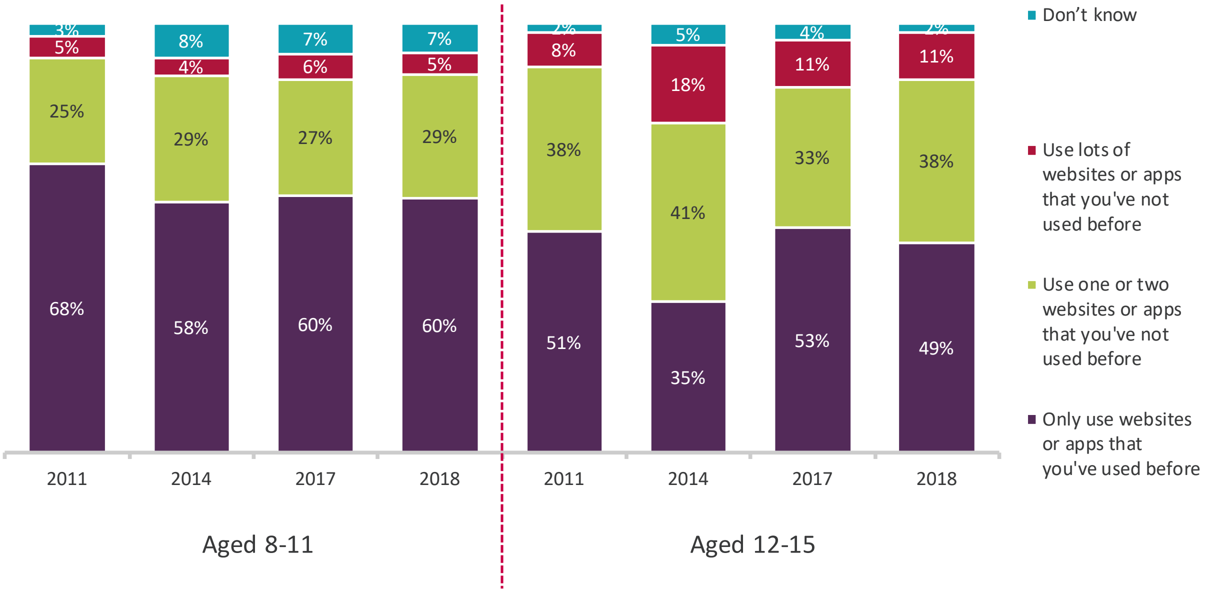
Younger children are more likely than older children to stick with familiar sites or apps

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, 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 50, three in five 8-11s (60%) say they only use websites or apps they have used before, more likely than among 12-15s (49%). Twelve to 15-year-olds are more likely than 8-11s to say they use one or two websites or apps they haven’t used before (38% vs. 29%) or lots of websites or apps they haven’t used before (11% vs. 5%), while 8-11s are more likely than 12-15s to say they are unsure (7% vs. 2%).

There has been no change since 2017 in this aspect of using websites, among 8-11s and 12-15s.

Figure 50: Experience of visiting websites not used before, among those who go online at home (2011) or elsewhere (2014, 2017, 2018), 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 (456 aged 8-11, 480 aged 12-15)

Distinguishing between different sources of online content

12-15s are more likely than in 2017 to name Google 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 51.

In 2018, 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 a third would turn to Google (36%) while 29% would turn to the BBC. Compared to 2017, 12-15s are more likely to say they would turn first to Google for this information (36% vs. 27%) and are less likely to turn first to the BBC (29% vs. 43%)[47]. 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 three in ten opting to use Google (29%) and around one in ten opting to use the BBC (9%) or social media (9%). Six per cent of 12-15s said they would be likely to turn first to Wikipedia, higher than in 2017 (3%).

More than two in five children aged 12-15 said they would turn first to YouTube (42%) when looking for information online about how to build, make or create things, with three in ten (30%) opting to use Google. One in ten (11%) would choose the BBC. No other source was chosen by more than one in ten children aged 12-15. Compared to last year, 12-15s are more likely to say they would turn first to Google (30% vs. 22%) or Wikipedia (6% vs. 3%).

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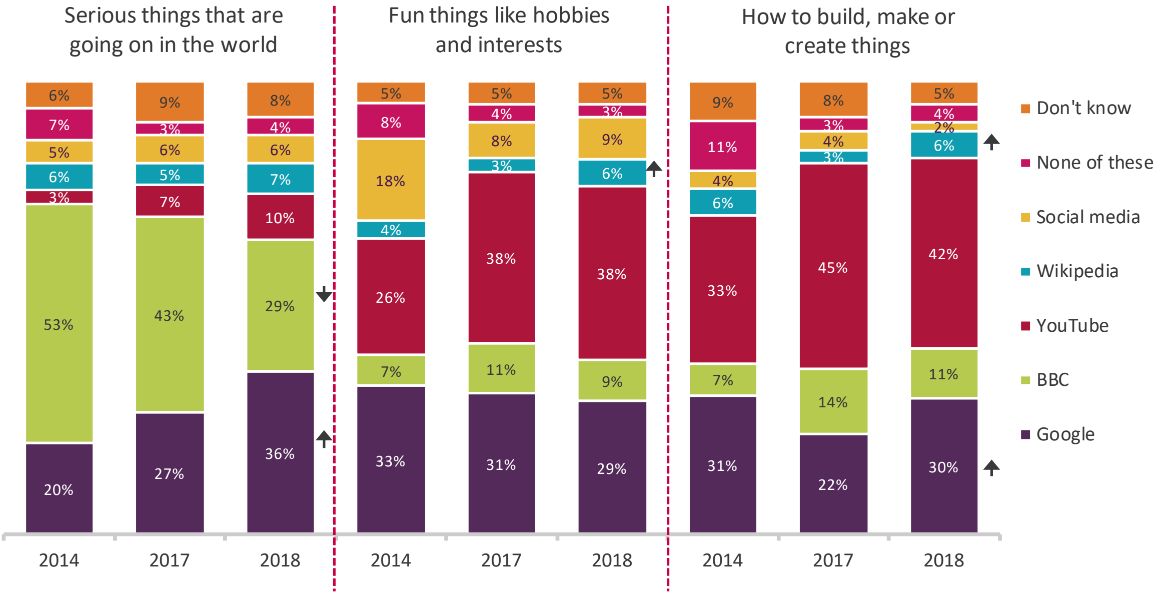
[47] This follows an increase between 2016 and 2017 from 35% to 43% for the BBC for this measure.

Figure 51: Online sources of accurate and true information for different scenarios among 12-15s: 2014, 2017, 2018



	Serious 2014	Serious 2017	Serious 2018	Fun 2014	Fun 2017	Fun 2018	Build 2014	Build 2017	Build 2018
Don't know	6%	9%	8%	5%	5%	5%	9%	8%	5%
None of these	7%	3%	4%	8%	4%	3%	11%	3%	4%
Social media	5%	6%	6%	18%	8%	9%	4%	4%	2%
Wikipedia	6%	5%	7%	4%	3%	6%	6%	3%	6%
YouTube	3%	7%	10%	26%	38%	38%	33%	45%	42%
BBC	53%	43%	29%	7%	11%	9%	7%	14%	11%
Google	20%	27%	36%	33%	31%	29%	31%	22%	30%

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 (480 aged 12-15). Significance testing shows any change between 2017 and 2018.

Critical understanding of online content

At least three in ten 8-15s consider that all or most of the information they see on social media sites is true

Children aged 8-15 who go online at home or elsewhere were asked whether they visited three particular types of websites or apps.[48] Those who visited each type were then asked whether they believed that all of the information on these sites or apps is true, most of it is true or some of it is true. The results are shown in Figure 52 for sites or apps used for school work/ homework[49], in

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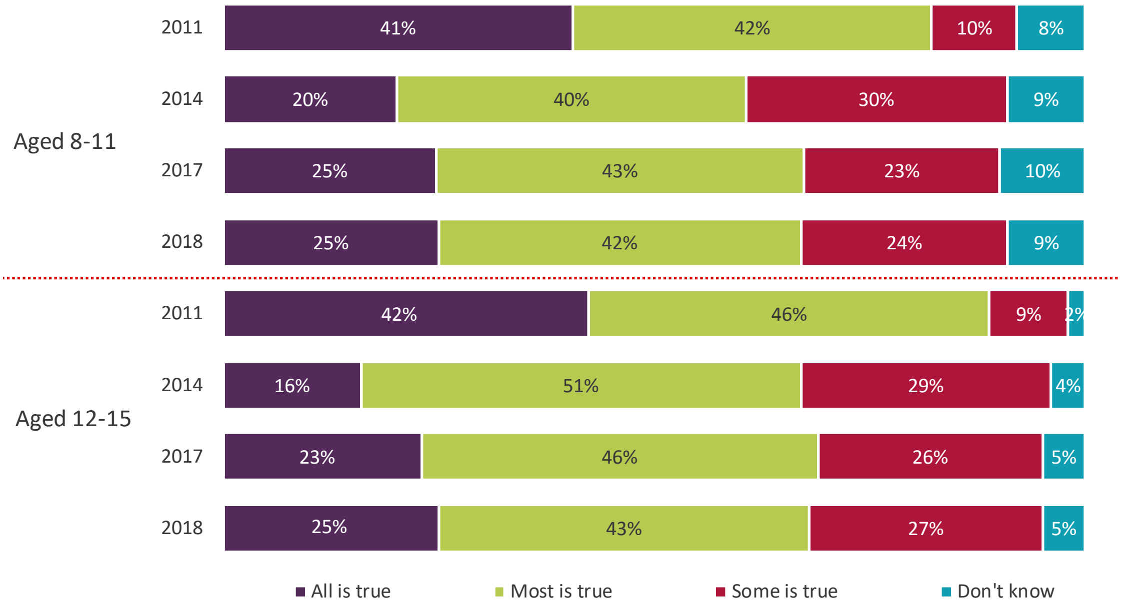
[48] Before 2014, home internet users were asked about types of websites, rather than types of websites or apps.

[49] Since 2016, the question wording has incorporated examples of the types of sites or apps referred to, which read 'for instance, BBC Bitesize or sites suggested by your teachers'.

Figure 53 for social media[50] and in Figure 54 for sites or apps about news and what is going on in the world[51].

The majority of 8-11s (81%) and 12-15s (91%) 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 both 8-11s and 12-15s believe that all of the information shown is true. This measure is unchanged since 2017 both for 8-11s and 12-15s.

Figure 52: Children's belief in the truthfulness in websites used for school/ homework at home (2011) or elsewhere (2014, 2017, 2018), by age



QC15B - When you go online do you visit sites 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 (362 aged 8-11, 433 aged 12-15).

Six in ten 8-11s (60%) and nearly nine in ten 12-15s (88%) 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

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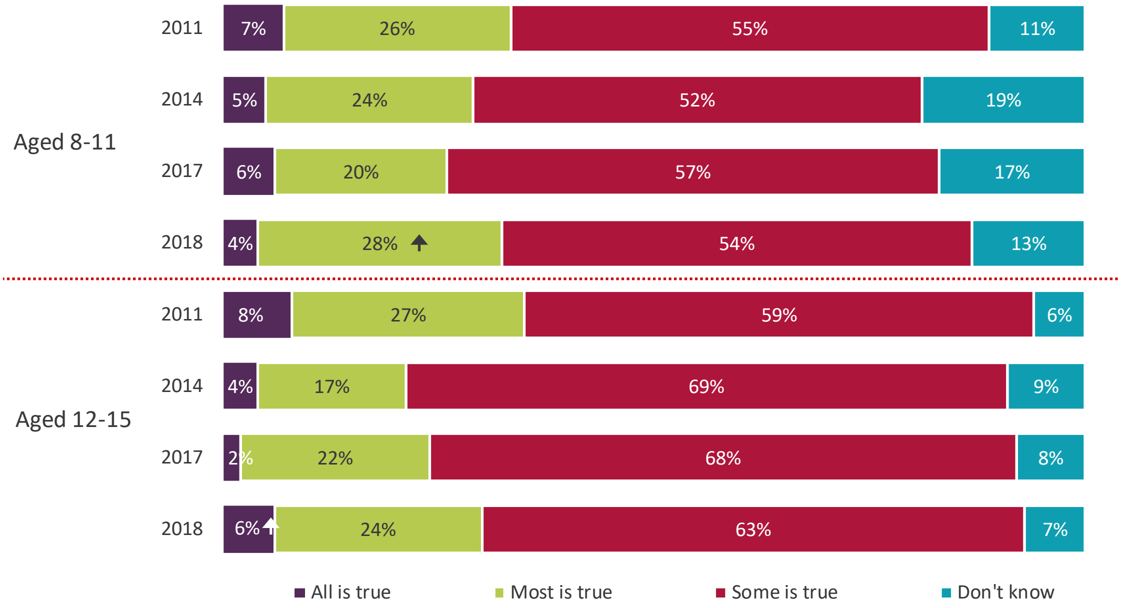
[50] Before 2014, home internet users were asked about social networking sites rather than social media sites or apps.
[51] Since 2016, the question wording has incorporated examples of the types of sites or apps referred to, which read 'for instance BBC news, CBBC Newsround, newspaper websites like the Daily Mail or the Guardian or news apps or sites like Buzzfeed'.

(4% for 8-11s and 6% for 12-15s). This response is more likely than in 2017 for 12-15s (6% vs. 2%), while 8-11s are more likely than last year to say that *most of* the information is true (28% vs. 20%).

Boys aged 8-11 are more likely than girls to say that 'most' of the information on social media sites or apps is true (36% vs. 20%). Girls of this age are more likely than boys to say they are unsure about this (17% vs. 10%).

Compared to the average for children aged 8-15, those in C1 households who visit social media sites or apps are more likely to believe that all the information on these sites is true (9% vs. 5%) and children aged 8-15 in DE households are less likely to say this (2%).

Figure 53: Children's belief in the truthfulness in websites used for social media at home (2011) or elsewhere (2014, 2017, 2018), 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 (261 aged 8-11, 416 aged 12-15). Significance testing shows any change between 2017 and 2018.

Two-thirds of 8-11s (66%) and around three-quarters of 12-15s (74%) 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. Around a quarter of 8-11s (23%) and one in six 12-15s (17%) who do this say that all of this information is true.

Compared to 2017, 12-15s are now more likely to believe that all the information on these sites or apps is true (17% vs. 10%)[52].

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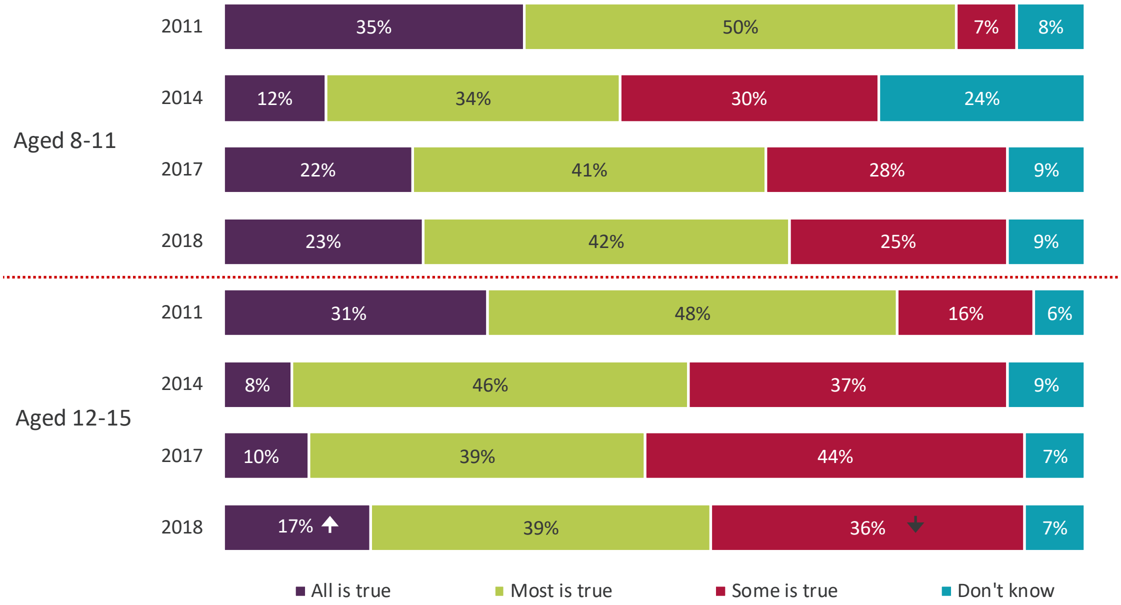
[52] This increase for 12-15s, however, follows a decrease between 2016 and 2017, from 20% to 10%.

Figure 54: Children's belief in the truthfulness in news websites or apps used at home (2011) or elsewhere (2014, 2017, 2018), 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 (288 aged 8-11, 351 aged 12-15). Significance testing shows any change between 2017 and 2018.

Three in ten 8-15s who use search engines think that if Google has listed a result it will be trustworthy

Children aged 8-15 who ever use search engines (83% of all 8-11s and 93% 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 55, half or more of all search engine users aged 8-11 (50%) or 12-15 (55%) make any type of critical judgement about search engine results, believing that some of the sites returned can be trusted and some can't[53].

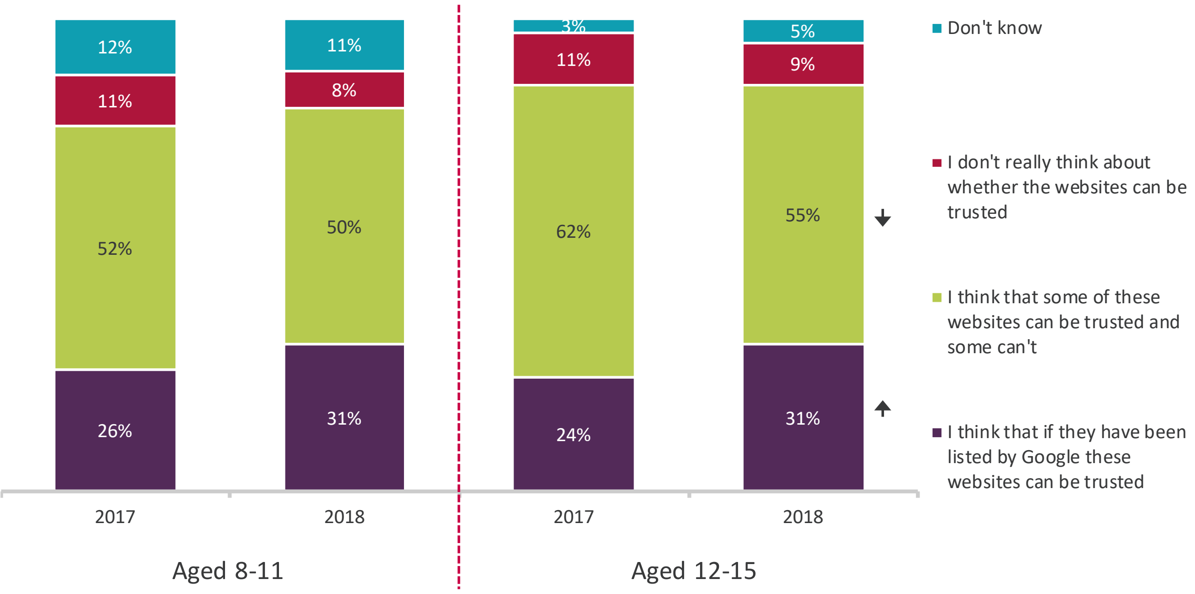
Three in ten 8-11s (31%) and 12-15s (31%) believe that if a website has been listed by Google it can be trusted, while about one in ten in each age group don't think about whether Google results can be trusted (8% for 8-11s and 9% for 12-15s).

Compared to 2017, 12-15s are less likely to say they make any type of critical judgement about search engine results (55% vs. 62%). But they are more likely to believe that the results returned by Google can be trusted (31% vs. 24%).

Among 8-15s who use search engines, girls are more likely than boys to say that some websites can be trusted, and some cannot (56% vs. 48%), while boys are more likely to say that results returned by a Google search can be trusted (34% vs. 28%).

Children aged 8-15 in AB households who go online and use search engine websites or apps are more likely than average to give the correct response: that some results returned by search engines can be trusted and some cannot (62% vs. 52%).

Figure 55: 8-15s' understanding of whether results listed by search engines can be trusted: 2017 and 2018



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[53] 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

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 (377 age 8-11, 443 aged 12-15). Significance testing shows any change between 2017 and 2018.

Seven in ten 12-15s who visit sites or apps they've not used before say they ever think about whether the information on these sites can be trusted to be true or accurate

In 2018, children aged 12-15 who go online and who say they ever visit sites or apps they have not used before (49% of all internet users aged 12-15) were asked the following question: "When you go to websites or apps you've never used before to look for information online, do you ever think about whether you can trust the information to be true or accurate?"[54]. Those who said they did were then asked: "Which of these things, if any, might you check to see if the information is true or accurate?" They were prompted with five potential checks and the option to nominate any other check, and the responses are shown in Figure 56.

Seven in ten (69%) 12-15s who say they ever visit sites or apps they've not used before say they ever think about whether the information can be trusted to be true/ accurate - a quarter (24%) say they don't think about this.

Among those who say they would consider whether they can trust websites they have not used before, no single check would be made by a majority of 12-15s. Four checks would, however, be made by at least one third of this group: check the general look of the website, e.g. the layout, colours or how professional it looks (39%), check how-up-to date the information on the website was (39%), ask someone else if they had used the website (37%) or cross-check some types of information on a number of websites (35%). A quarter (24%) would rely on whether they had previously heard of the company.

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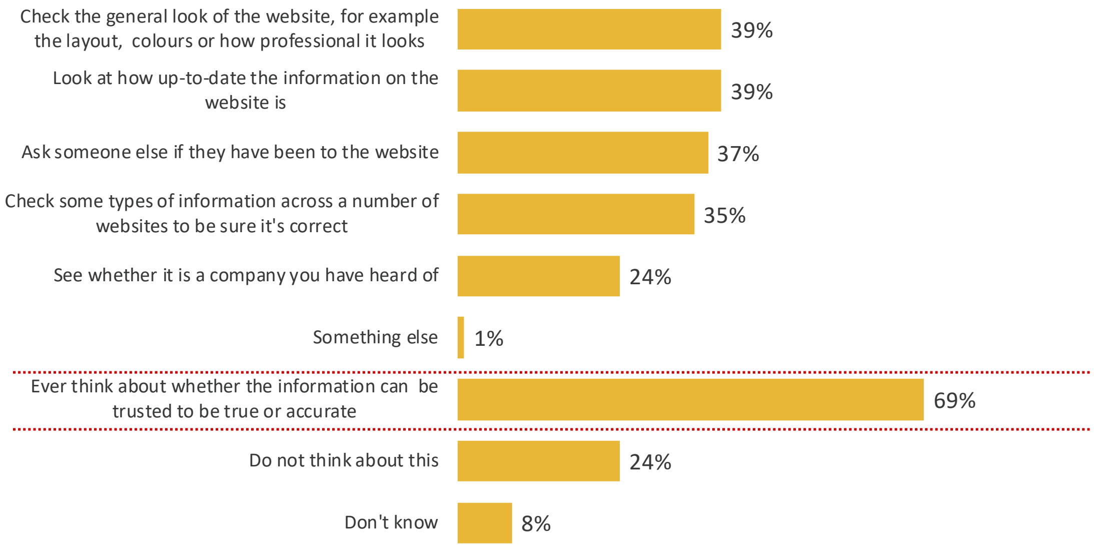
[54] This question was amended in 2018 and the results are not therefore comparable with previous years'.

Figure 56: Checks made by 12-15s who go online to establish whether they can trust websites they haven't visited before: 2018



QC18 – When you go to websites or apps you've never used before to look for information online, do you ever think about whether you can trust the information to be true or accurate? IF YES: Which of these things, if any, might you check to see if the information is true or accurate? (prompted responses, multi coded).

Base: Children aged 12-15 who go online who use websites they've not used before (205).

Awareness and understanding of advertising in media

More than nine in ten 12-15s say they see online adverts, an increase since 2017

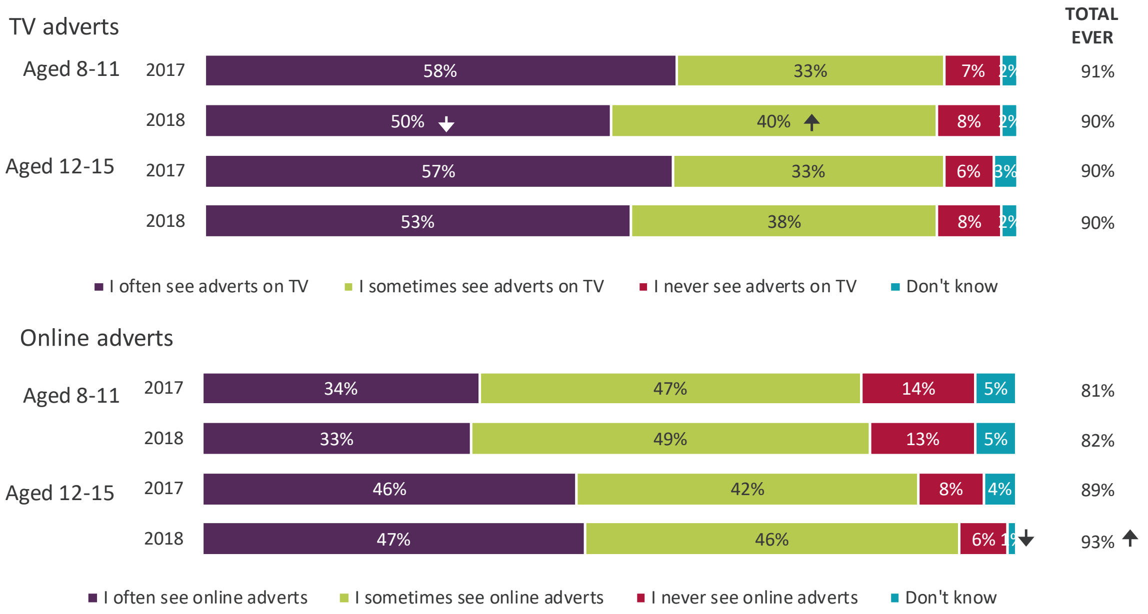
Since 2017, questions have been added to the study to look at awareness of TV advertising among 8-15s who watch TV at home or elsewhere, and awareness of online advertising among 8-15s who go online at home or elsewhere. The results are shown in Figure 57. Those aware of each type of advertising are then asked the extent to which they feel that the adverts tell the truth about what they are selling, as shown in Figure 58.

Among those who watch TV, there are no differences by age in the frequency with which children see TV adverts. While the overall incidence of ever seeing TV adverts is unchanged since 2017 for 8-11s, they are less likely to say they 'often' see adverts on TV (50% vs. 58%), and are more likely to say they 'sometimes' see them (40% vs. 33%)

Among those who go online, children aged 12-15 (93%) are more likely than those aged 8-11 (82%) to say they ever see online adverts and are more likely to say this happens 'often' (47% for 12-15s vs. 33% for 8-11s). Compared to last year, 12-15s are more likely to say they see online adverts (93% vs. 89%).

Girls aged 12-15 are more likely than boys to say they ever see adverts on television (94% vs. 86%), as they are more likely to say they 'sometimes' see these TV adverts (42% vs. 33%).

Figure 57: Frequency of seeing adverts on TV and online among 8-15s who watch TV/ go online: 2017, 2018



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 (490 aged 8-11, 479 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 (456 aged 8-11, 480 aged 12-15). Significance testing shows any change between 2017 and 2018.

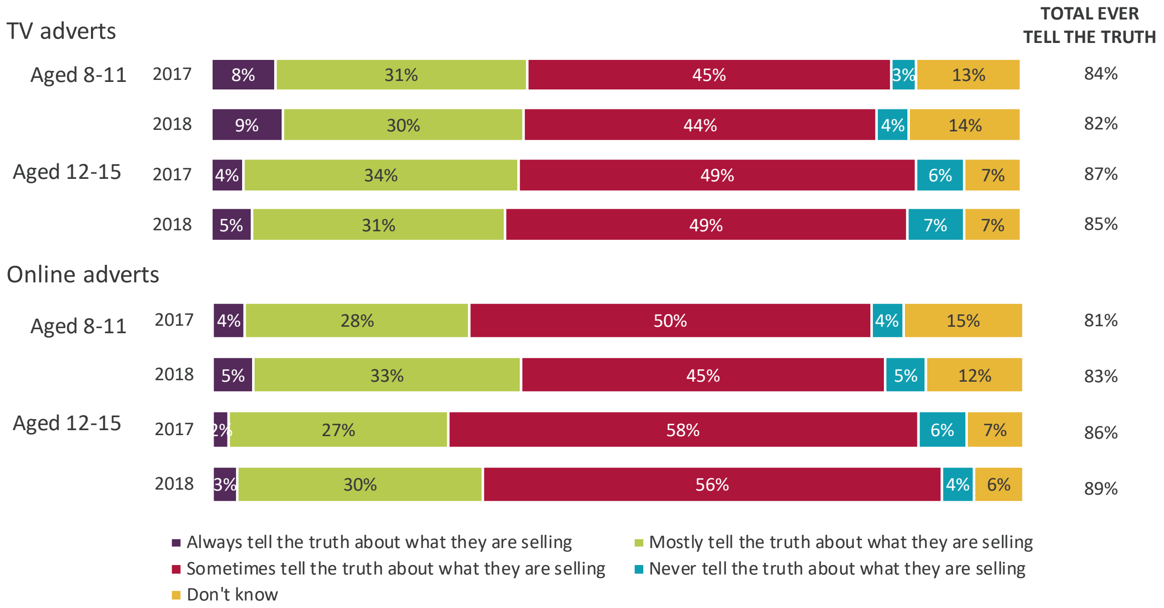
More than four in five 8-15s feel that TV and online advertising tells the truth, with most of these saying this applies 'sometimes' rather than 'mostly' or 'always'

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 58, the most likely response is that the TV adverts 'sometimes' tell the truth about what they are selling, given by 44% of 8-11s and 49% of 12-15s. About three in ten of 8-11s and 12-15s who ever see TV advertising say that these adverts 'mostly' tell the truth about what they are selling. Few (9% of 8-11s and 5% of 12-15s) say that TV adverts 'always' tell the truth, and more are unsure (14% of 8-11s and 7% of 12-15s).

In 2018, 12-15s are more likely than 8-11s to say that TV adverts 'never' tell the truth about what they are selling (7% vs. 4%), while 8-11s are more likely than 12-15s to say they 'always' tell the truth (9% vs. 5%). There has been no change since 2017 in attitudes towards the truthfulness of TV advertising, for either 8-11s or 12-15s.

Those aware of online advertising were asked the same question. As shown in Figure 58, the most likely response is that online adverts 'sometimes' tell the truth about what they are selling, given by more than two in five 8-11s (45%) and a higher proportion of 12-15s (56%). Around three in ten 8-11s (33%) and 12-15s (30%) who ever see online advertising say that these adverts 'mostly' tell the truth. Very few (5% of 8-11s and 3% of 12-15s) say that online adverts 'always' tell the truth; more respondents are unsure (12% of 8-11s and 6% of 12-15s). Children aged 12-15 (4%) are as likely as 8-11s (5%) to say that online adverts 'never' tell the truth about what they are selling. As with TV advertising, there has been no change since 2017 in attitudes towards the truthfulness of online advertising, for either 8-11s or 12-15s.

Figure 58: Attitudes toward the truthfulness of TV and online advertising among 8-15s who see TV/ online advertising: 2017, 2018



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 (445 aged 8-11, 430 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 (371 aged 8-11, 441 aged 12-15).

A minority of 8-15s who use search engines correctly identified sponsored links on Google as advertising

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 four 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 four results. The options they were prompted with were[55]:

- 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 59 below. More than a third of 8-11s (35%) stated that the first four results were advertising/ had paid to appear there. Compared to 8-11s, 12-15s demonstrate a better understanding of which results are sponsored or paid for, with half of 12-15s (49%) giving the correct response.

Similar proportions of 8-11s and 12-15s gave incorrect responses: either saying these were the most popular results (33% for 8-11s and 34% for 12-15s) or the best results (28% for 8-11s and 27% for 12-15s). A quarter of 8-11s (24%) said they were unsure, higher than among 12-15s (15%).

Children were allowed to select more than one response to this question, so it is useful to look at those who gave only the correct response and did not select any of the other options. Nearly a quarter of 8-11s (23%) and a third of 12-15s (33%) 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.

Compared to 2017, children aged 8-11 are more likely to say that the results are adverts (35% vs. 28%) but are also more likely to say they are the best results (28% vs. 18%); as such, the proportion stating only the correct response is unchanged. Twelve-15s are as likely now as in 2017 to identify these results as adverts. They are also as likely to state only the correct response, despite a higher proportion giving an incorrect response: that they are the best results (27% vs. 19% in 2017).

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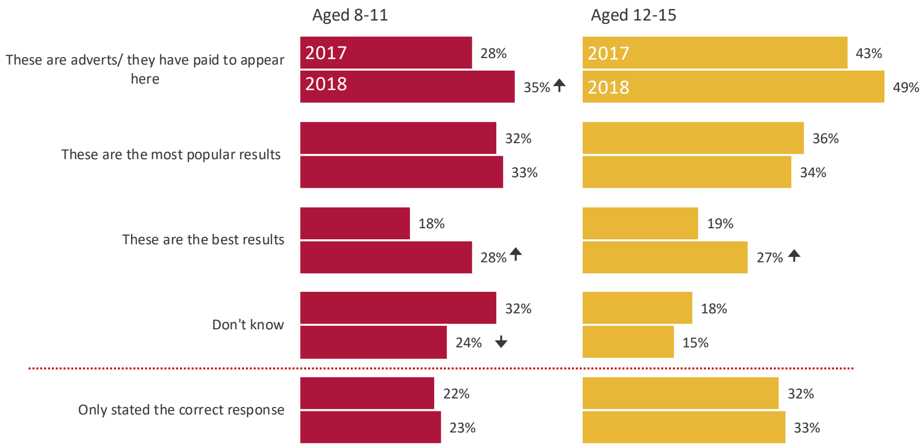
[55] They were also allowed to nominate some other reason or say that they were unsure.

Figure 59: Understanding of paid-for results returned by Google searches, among 8-15s who use search engine websites: 2017, 2018



QC28 - This is a picture (SHOWCARD OF IMAGE) from a Google search for ‘children’s trainers’. Do you know why the first four results on the left 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 (377 aged 8-11, 443 aged 12-15). Significance testing shows any change between 2017 and 2018.

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 explained why vloggers might say favourable things about a particular product or brand[56].

More than six in ten internet users aged 12-15 (65%) are aware that the vloggers might be paid by the company to say favourable things, similar to the findings in 2017 (62%).

Children aged 12-15 in ABC1 households who go online are more likely than those in C2DE households to be aware of the potential for product endorsement by vloggers on sites like YouTube; seven in ten in ABC1 households (70%) say that vloggers may be saying good things about products or brands because they are being paid by companies or brands to say this, compared to six in ten (60%) in C2DE households.

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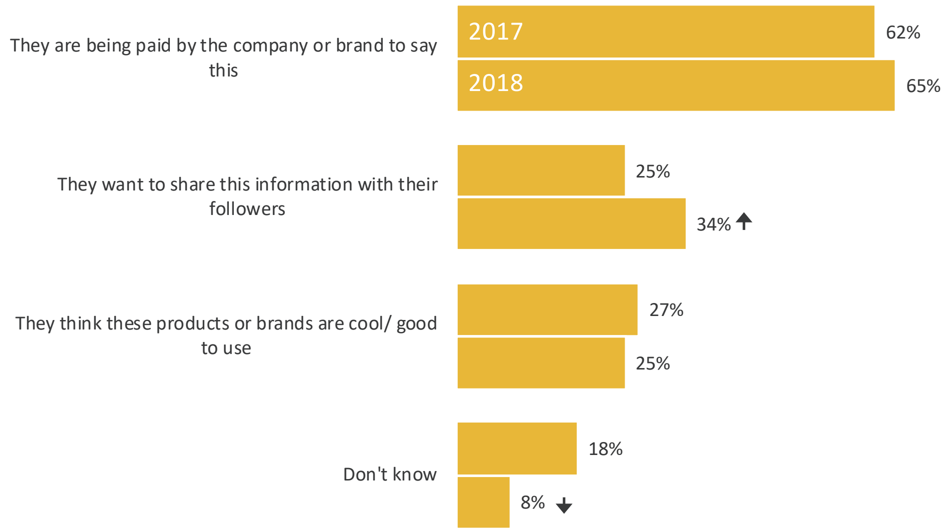
[56] The specific question stated: ‘On sites like YouTube some vloggers with lots of followers like Zoella or KSI might say good things about a particular company or product or brand, such as Nike clothing, a new game, or clothes from TopShop. Why do you think they might say good things about these products or brands?’

Figure 60: Understanding among 12-15s of potential product endorsement by vloggers: 2017, 2018



QC37 - On sites like YouTube some vloggers with lots of followers like Zoella or KSI might say good things about a particular company or product or brand, such as Nike clothing, a new game, or clothes from Top Shop. 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 (480). Significance testing shows any change between 2017 and 2018.

Understanding of how the BBC, Google and YouTube are funded

Although most YouTube users aged 12-15 correctly say that advertising is the main source of funding for YouTube, a quarter believe it is user-funded

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).

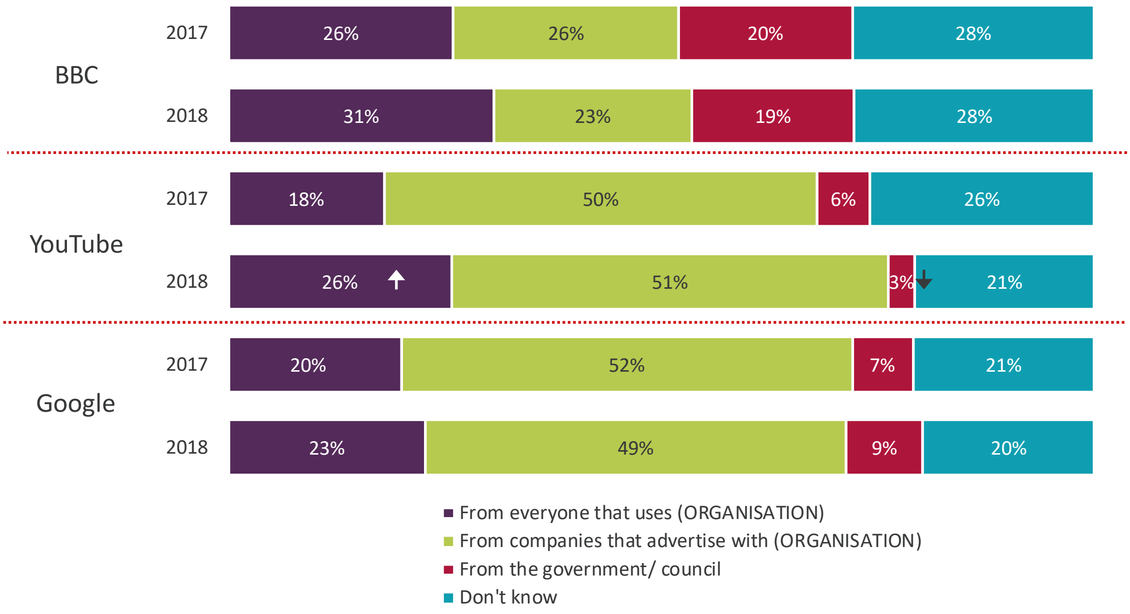
Children aged 12-15 who used these content providers are asked: "Where do you think the BBC/ Google/ YouTube mainly gets its money from?". At each of these questions, respondents are prompted with the same four possible response options (see Figure 61).

When asked about the BBC, three in ten 12-15s who watch TV (31%) gave the correct response that it was funded by everyone who uses the BBC, while 23% thought it was funded by companies that advertise with the BBC, or by the Government or council (19%). Around a quarter (28%) were unsure. All the measures relating to BBC funding are unchanged compared to 2017.

Results are similar across YouTube and search engine users. Around half of 12-15s gave the correct response: that companies pay to advertise on YouTube (51%) and on Google (49%). These results are unchanged since 2017. In 2018, however, a quarter (26%) of YouTube users gave the incorrect response: that YouTube is mainly funded by everyone who uses YouTube; an increase since 2017 (18%).

Children aged 12-15 in ABC1 households who use YouTube or search engines like Google are more likely than those in C2DE households to give the correct response about how these companies are funded. More than half (56%) of YouTube users in ABC1 households say that YouTube is funded from advertising, compared to less than half (45%) of those in C2DE households. Those in C2DE households are more likely than those in ABC1 households to say that YouTube is funded by users (31% vs. 21%). Similarly, 54% of search engine users aged 12-15 in ABC1 households correctly identify that Google is funded through advertising, compared to 44% of those in C2DE households. Those in C2DE households are more likely to say that Google is funded by the Government/ council (13% vs. 5%).

Figure 61: Understanding of how BBC/ YouTube/ Google are funded, among users aged 12-15: 2017 and 2018



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 (479)/ Children aged 12-15 who use the YouTube website or app (432) / Children aged 12-15 who go online and use search engine websites or apps (443). Significance testing shows any change between 2017 and 2018.

A8. News consumption

This section reports on some of the findings of Ofcom's news 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 they use.

In total, 500 interviews from November and December 2017 have been combined with 501 interviews from March and April 2018. Please note that the combined 2017/2018 data have been reported as '2018' in this annex. Quotas were set on age, gender, SEG and nation to ensure that the sample was representative of 12-15s who are online in the UK[57].

Key findings

- Six in ten 12-15s say they are interested in 'reading, watching, listening to or following news', with 14% saying they are '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'.
- The most popular type of news among 12-15s is 'music news' (58%) followed by news about celebrities (47%) and news about animals or the environment (43%).
- Six in ten (62%) 12-15s say that they actively look for news, but a greater proportion (82%) say they see news inadvertently; for example, by finding out news from other people or by seeing news while looking for something else.
- The most popular ways to access news among 12-15s are TV (68%), family (64%), social media and friends (both 56%). Around three in ten (31%) say they use the radio for news.
- The most popular source overall for news is BBC One/BBC Two (45%). However, social media sources dominate the top ten news sources for 12-15s, with six featuring in the list.
- When asked to score the news sources they use on a scale of one to ten for a range of attributes, 12-15s score TV highly for accuracy and trustworthiness, while social media scores lowest for these qualities.
- 12-15s who use social media for news are most likely to access news via comments from friends/family/other people they follow (52%), links to news stories (52%) and trending news (51%) when getting their news through this platform.

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[57] A full discussion of the methodology and findings from the adults and children's news consumption research is available here: https://www.ofcom.org.uk/__data/assets/pdf_file/0024/116529/news-consumption-2018.pdf

- Just over half of 12-15s (53%) who use social media for news think about whether news stories on social media are reported truthfully only ‘sometimes’, and a similar proportion (49%) said it was difficult to tell whether news on social media was accurate.
- Two in five (43%) 12-15s who go online say they have seen something online or on social media that they thought was fake news. A third of those who are aware of fake news say they would tell their parents or other family members if they saw a fake news story online.

Four in ten 12-15s say they are not interested in ‘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 62 below, six in ten children say they are interested in news; 14% say they are ‘very interested’ and 46% say they are ‘quite interested’. In contrast, around four in ten (39%) say they are not interested in news.

When those who said they were not interested in news were asked why, the most common response was that it is ‘too boring’ (41%), followed by ‘not relevant for people my age’ (23%). A further 13% also say that it is ‘too upsetting’. Girls who say they are not interested in reading, watching, listening to or following news are more likely than boys in this category to say that this is because it is ‘too upsetting’ (18% vs. 9%).

This is a theme that is also observed among adults in Ofcom’s qualitative news research[58]; some respondents say that they feel ‘down’ after consuming news as they think it always focuses on negative events. Parents in the qualitative research also told us that they sometimes shield their children from the news when a story is broadcast that they feel is inappropriate for their child to hear; for example, the reporting of a rape case on the lunchtime radio bulletin.

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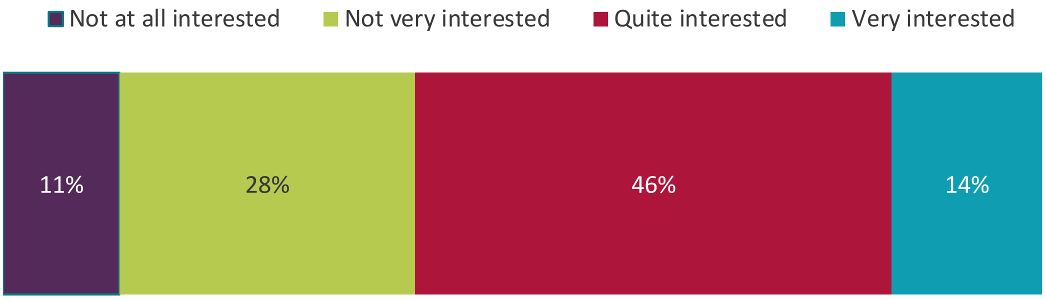
[58] https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/news-media/navigating-news-online

Figure 62: Interest in news among 12-15s who go online



Source: Ofcom Children's News Consumption Survey 2018

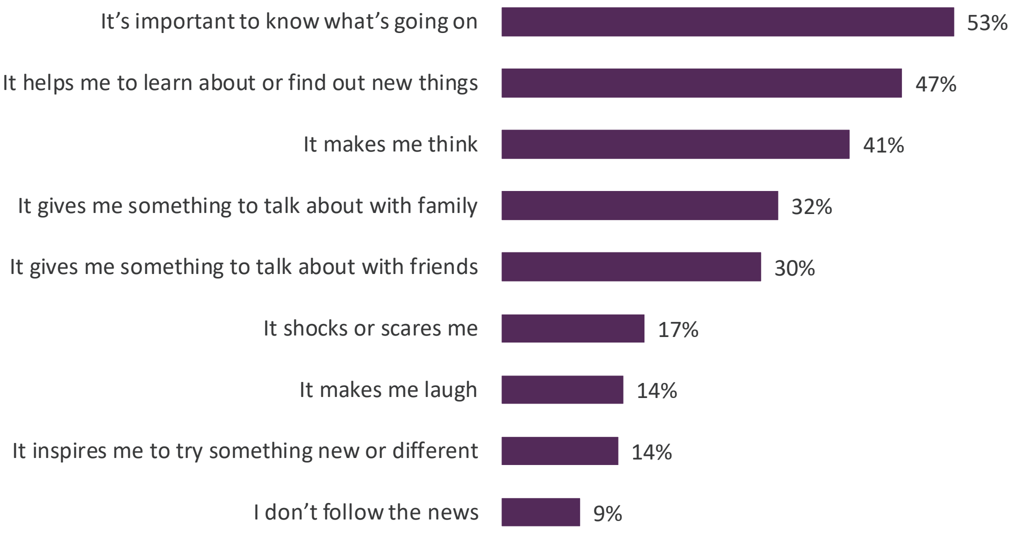
B1: How interested are you in reading, watching, listening to or following news?

Base: All children aged 12-15 (1001)

Around half of children follow the news to find out what's going on, or because they want to learn about new things

All the children surveyed were given a list of reasons why young people might follow the news and were asked to select the ones that applied to them. The most popular reasons were "it's important to know what's going on" (53%), "it helps me learn about or find out about new things" (47%) and "it makes me think" (41%). Some young teens consider news to be a talking point; around three in ten say "it gives me something to talk about with family" (32%) or "it gives me something to talk about with friends" (30%). While we saw earlier (Figure 62) that a considerable proportion (39%) of children say they are not interested in the news, only one in ten (9%) say they don't follow the news.

Figure 63: Reasons for following the news among 12-15s who go online



Source: Ofcom Children's News Consumption Survey 2018

F1: Here are some reasons that young people might have for reading, watching, listening to or following news. Which of these apply to you?

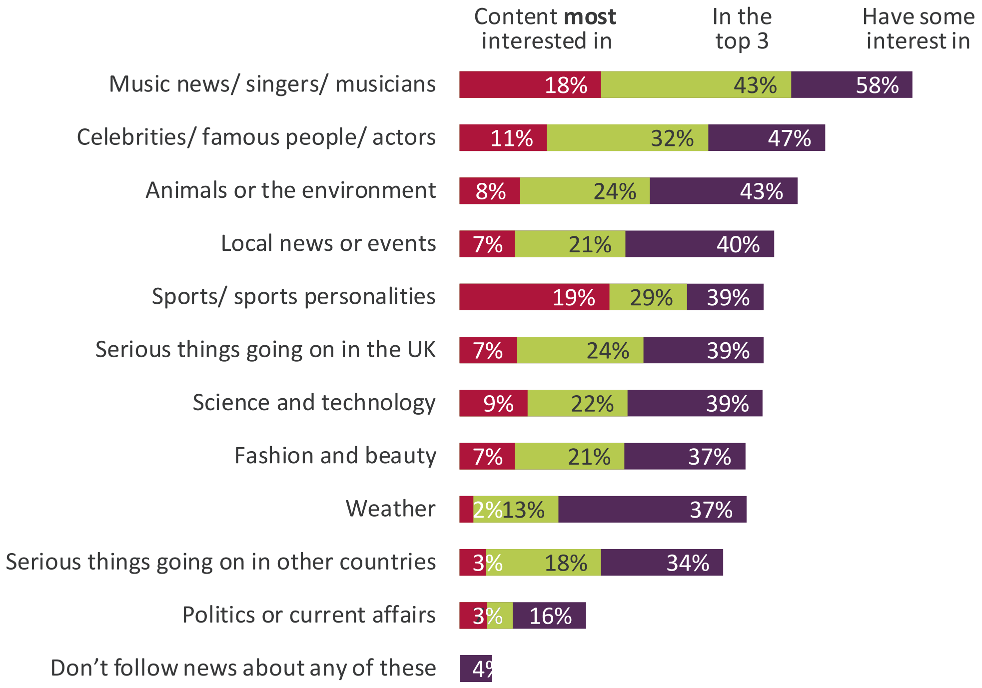
Base: All children aged 12-15 (1001)

When prompted with a list of different types of news, almost all 12-15s were interested in at least one type of news content

All children were 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 64, six in ten 12-15s are interested in music news (58%), while around half are interested in news about celebrities (47%), animals/the environment (43%) and local news and events (40%). Interest in some specific types of news does differ by gender, with greater interest among girls in news about music, celebrities, animals and the environment, fashion or beauty.

Once shown all the different types of news, 96% of 12-15s state an interest in at least one of the types. Given that just 39% said they were interested in "reading, watching, listening to or following news", it is apparent that 12-15s do not always associate the umbrella term 'news' with the broad range of topics subsequently presented to them.

Figure 64: Interest in different types of news content among 12-15s who go online



Source: Ofcom Children's News Consumption Survey 2018

B3: Here are some different types of news. Which, if any, of these are you interested in? B4: Which of these types of news are you most interested in?

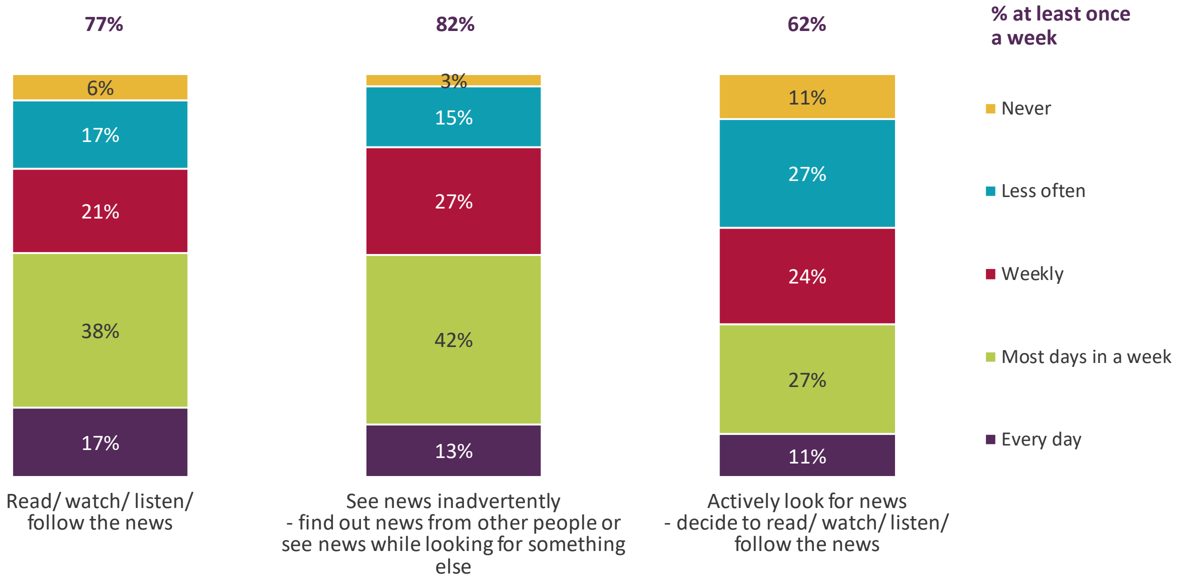
Base: All children aged 12-15 (1001)

Six in ten 12-15s say they actively look for news at least once a week rather than just coming across it, but a greater proportion say they see news inadvertently

We asked children how often they read, watch, listen to or follow the news, and 38% say they do so 'most days in a week' (38%). Two in ten (21%) say they consume news weekly, while a slightly lower proportion (17% in each case) say they consume news either every day or less than once a week. Six per cent say they never consume news.

When we asked children whether they actively look for news, six in ten (62%) say they do so at least weekly, but a greater proportion (82%) say they see news inadvertently; for example, by hearing it from other people or by coming across it while looking for something else.

Figure 65: Frequency of following the news among 12-15s who go online



Source: Ofcom Children's News Consumption Survey 2018

Question: B5. How often do you read, watch, listen to or follow the news? B6. Sometimes people find out about the news because others are watching, listening to or talking about it. On other occasions they may see a news story online, when they're lookling for something else. How often, if at all, do you come across the news like this? B7. Sometimes people actively look for news. For example, they decide to watch it on TV, listen to it on the radio or read it in the paper. On other occasions, they may go online to look for news, sign up to news alerts or read news updates on social media. How often, if at all do, you actively read, watch, listen to or follow the news like this?

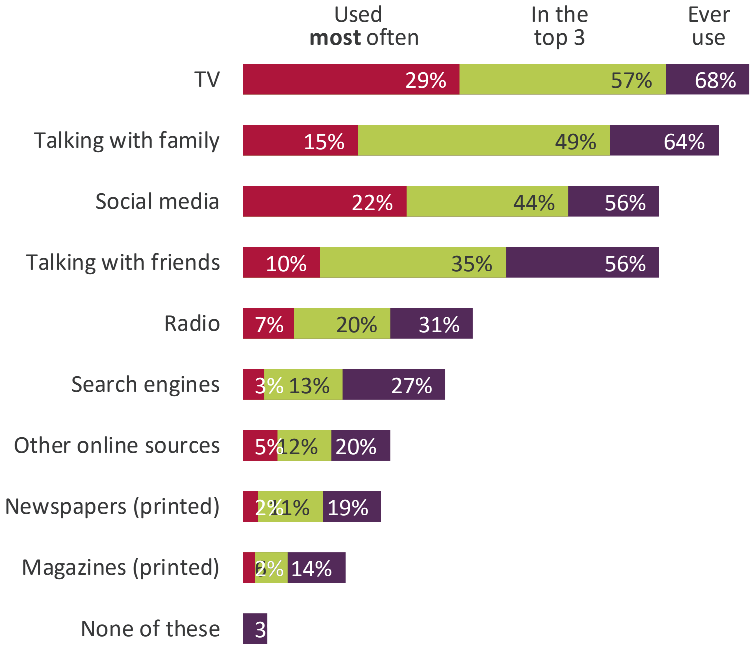
Base: All children aged 12-15. 2018=1001

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

All the children surveyed were shown a randomised list of nine different ways to access news and were asked to say which they ever used. As shown in Figure 66, the most popular way to access news is via TV (68%), followed by talking with family (64%), social media and talking with friends (both 56%). When asked which platform they used most often for news consumption, TV came top (29%), followed by social media (22%). This is mirrored in Ofcom's adults' News Consumption Survey, which found that TV was the most popular platform for news consumption, followed by social media and radio (both 44%). But when we look just at 16-24s in the adults' research, the internet is the most popular platform for news consumption (82%), followed by television (57%). This suggests there is a significant shift in the way younger teens consume news, compared to older teens/ young adults.

As observed in the qualitative news research, it is important to consider that the frequency with which children consume online news might be under-reported, for a number of reasons[59]. Many people most readily associate the term 'news' with traditional sources, such as newspapers and on TV, as opposed to online. People are also not always fully aware how much time they spend consuming news online, as much of this is processed unconsciously, and people are exposed to news stories without realising it. In addition, smartphones and social media typically mix news with other types of content, which can sometimes lead to people not being aware they are consuming news.

Figure 66: Platforms used for news 'nowadays' among 12-15s who go online



Source: Ofcom Children's News Consumption Survey 2018

Question: C1. 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? C2. And which of these ways do you use the most to get updates on news stories? Base: All children aged 12-15. 2018=1001

We asked children where they tend to go for the type(s) of news they are interested in. For most types of news, the most popular source is TV. This is particularly the case for international news (48%), weather (47%), serious issues in the UK, and politics/current affairs (both 46%). Music news, news about celebrities and fashion/beauty news are most commonly accessed via social media.

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[59] For further information on the findings of the qualitative news research, see: https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/news-media/navigating-news-online

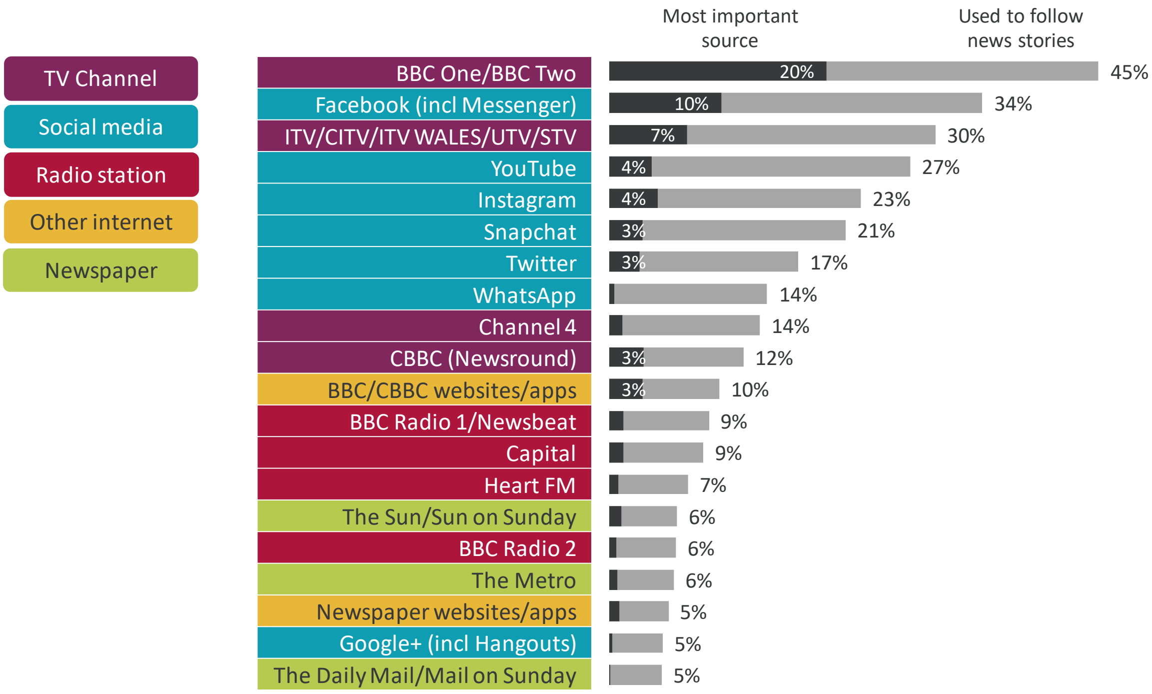
While the BBC is the most popular and most important news source among 12-15s, social media sources dominated the top ten news sources

We asked 12 to 15-year-olds about the specific news sources that they use to read, watch, listen to or follow news stories. The most popular source is BBC One/BBC Two (45%), followed by Facebook (34%) and ITV (30%). The children were also asked to select the news source that is most important to them, and reflecting the previous findings, BBC One/BBC Two came out on top (20%) followed by Facebook (10%) and ITV (7%).

There are seven social media sources in the top 20 most-used news sources, six of which appear in the top ten. In comparison, there are four TV channels, four radio stations, three newspapers (printed) and two other internet sources in the top 20 list. Given the widespread use of social media sites for news, it is possible that several other internet sources are under-reported. This is because social media sites often act as intermediaries, providing links to articles from other sources such as the BBC or the Daily Mail, rather than being the source themselves.

On average, children use 2.6 social media sites for news consumption, which is the highest number of individual sources among the five types of platform, except for ‘other internet’ sources (2.9). The average number for radio and TV is 1.5 for both, and for printed newspapers it is 1.8. Adults have a narrower repertoire of sources of social media news than children (2.0); but this is reversed when it comes to the number of news sources they use via other platforms (3.6 for other internet, 2.8 for both TV and newspapers and 2.0 for radio).

Figure 67: Top 20 news sources used by 12-15s who go online



Source: Ofcom Children's News Consumption Survey 2018

Question: D1. Which, if any, of the following do you use to read, watch, listen to or follow news stories? E1a. Here is a list of all the news sources that you say you use. Which ONE of these is the most important news source to you?

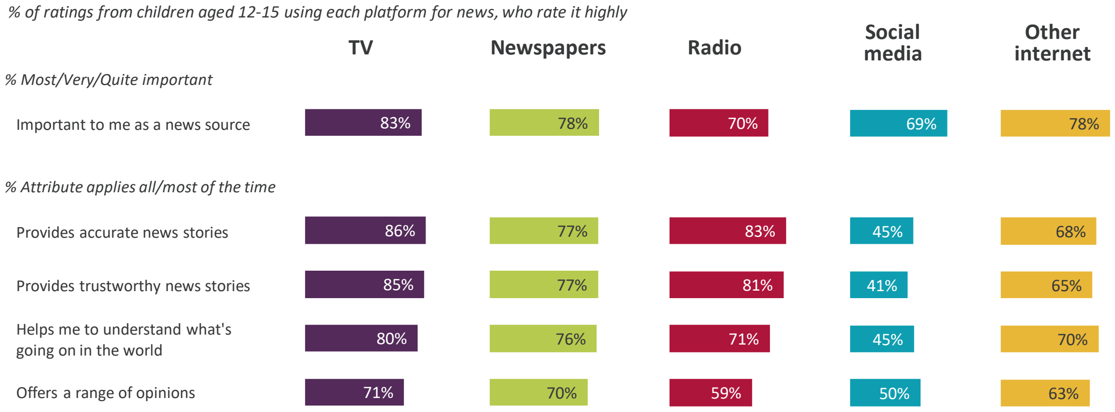
Base: All children aged 12-15. 2018=1001

TV news scores highly for attributes such as accuracy and trustworthiness while social media scores lowest

For each of the news sources they used, children were asked to rate how important each source was to them, from 'very' to 'not at all' important. The results for each source were then aggregated to get an indication of the overall importance of each platform for news consumption among children aged 12-15. As shown in Figure 68 below, TV is rated as the most important news platform, with 83% of 12-15s who get news from TV rating it either the most important news source, or 'very' or 'quite' important. This is followed by newspapers and 'other internet' sources (both 78%), radio and social media (70% and 69% respectively).

In addition to rating the importance of each news source, these 12-15 year-olds were asked to rate the news sources they used against a range of attributes. These are set out in Figure 68. Those who access news via TV give the strongest ratings for all of the attributes asked about, whereas those who access news via social media give relatively poor scores. Just over four in ten social media news users rate this platform highly for providing trustworthy news (41%) and for providing accurate news stories (45%), compared to 85% and 86% for TV. Newspapers and radio also scored comparatively highly for the majority of attributes (between 70% and 83%), although radio scored lower on the extent to which it offers a range of opinions (59%).

Figure 68: Attributes of news platforms among 12-15s who go online



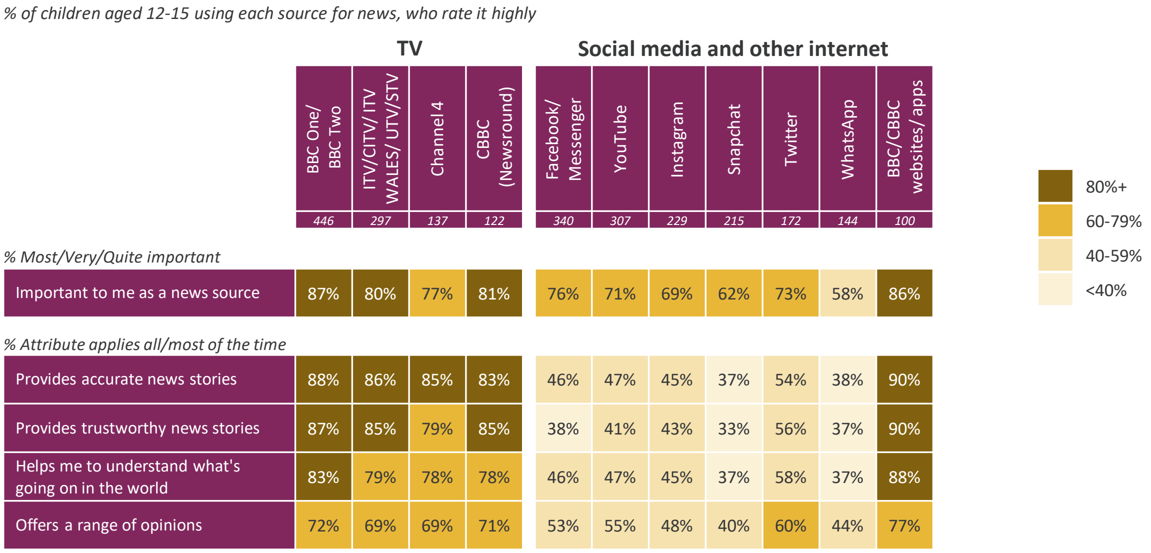
Source: Ofcom Children’s News Consumption Survey 2018

Question: E2. You will now see all of the other news sources that you use. I would like you to tell me how important each one is to you. E3. You will now see a list of statements.I would like you to tell me how often each of these statement applies to each of the different news sources

Base: All ratings by children aged 12-15 who use each platform for news. TV=1042, newspapers=341, radio=454, social media=1463, other internet=330

Figure 69 below shows these same attributes broken down by TV channels, social media sites and other internet channels/ websites. The shading has been added to indicate where comparatively high or low results have been achieved (it does not indicate statistically significant differences). TV news sources range between 69% and 88% for all attributes, with BBC One/Two scoring particularly well for most attributes. There is a much wider range of results for social media and other internet sources: between 33% and 90%. The BBC/CBBC websites/apps recorded the highest score across each of the four news attributes (ranging from 77% to 90%), with BBC One/Two achieving very similar scores for ‘provides accurate news stories’ and ‘provides trustworthy news’ (88% and 87%, respectively) and only slightly lower for ‘helps me to understand what’s going on in the world’ (83%) and ‘offers a range of opinions’ (72%). Snapchat and WhatsApp recorded the lowest scores across these attributes (for example, 33% of users rated Snapchat highly for providing trustworthy news sources, while 37% rated WhatsApp highly for this attribute).

Figure 69: Attributes of news sources among 12-15s who go online



% of children aged 12-15 using each source for news, who rate it highly

	TV				Social media and other internet						
	BBC One/ BBC Two	ITV/CITV/ ITV WALES/ UTV/STV	Channel 4	CBBC (Newsround)	Facebook/ Messenger	YouTube	Instagram	Snapchat	Twitter	WhatsApp	BBC/CBBC websites/ apps
	446	*297*	*137*	*122*	*340*	*307*	*229*	*215*	*172*	*144*	*100*
% Most/Very/Quite important											
Important to me as a news source	87%	80%	77%	81%	76%	71%	69%	62%	73%	58%	86%
% Attribute applies all/most of the time											
Provides accurate news stories	88%	86%	85%	83%	46%	47%	45%	37%	54%	38%	90%
Provides trustworthy news stories	87%	85%	79%	85%	38%	41%	43%	33%	56%	37%	90%
Helps me to understand what's going on in the world	83%	79%	78%	78%	46%	47%	45%	37%	58%	37%	88%
Offers a range of opinions	72%	69%	69%	71%	53%	55%	48%	40%	60%	44%	77%

Source: Ofcom Children's News Consumption Survey 2018

Question: E2. You will now see all of the other news sources that you use. I would like you to tell me how important each one is to you. E3. You will now see a list of statements. I would like you to tell me how often each of these statement applies to each of the different news sources.

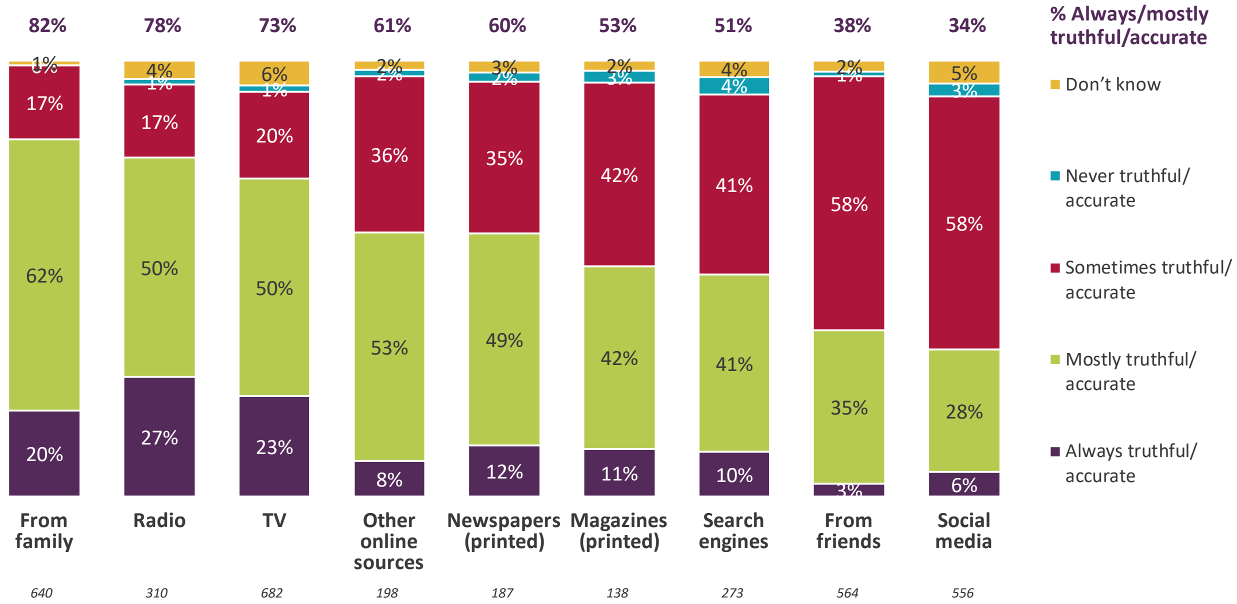
Base: All children aged 12-15 who use each source for news (bases shown above, only sources used by 100+ respondents included).

NOTE: colour differences in the table are to show different ranges of scores. The results have not been tested for statistical significance.

Family, radio and TV are perceived to be the most truthful news sources, while social media and friends are seen as the least truthful

Children who said they used a specific platform for news consumption were asked the extent to which they felt news on that platform was reported truthfully. News from family is perceived to be the most truthful type of news; 82% said it was either 'always' or 'mostly' reported accurately. This is followed by radio (78%), TV (73%), other online sources (61%) and printed newspapers (60%). Just over a quarter (27%) of radio news users say the news reported on the radio is 'always' accurate, the highest across all types of news platform. News on social media is seen to be the least accurate (with 34% saying it was either 'always' or 'mostly' reported accurately), followed by news from friends (38%).

Figure 70: Perceived accuracy of news stories from each platform among 12-15s who go online



Question: C4. Which one of these answers best describes the news that you read or see?

C5/6. When you hear about news stories from your [friends / family], how likely do you think the stories are to be accurate?

Base: All children aged 12-15 who use each platform for news (bases shown above)

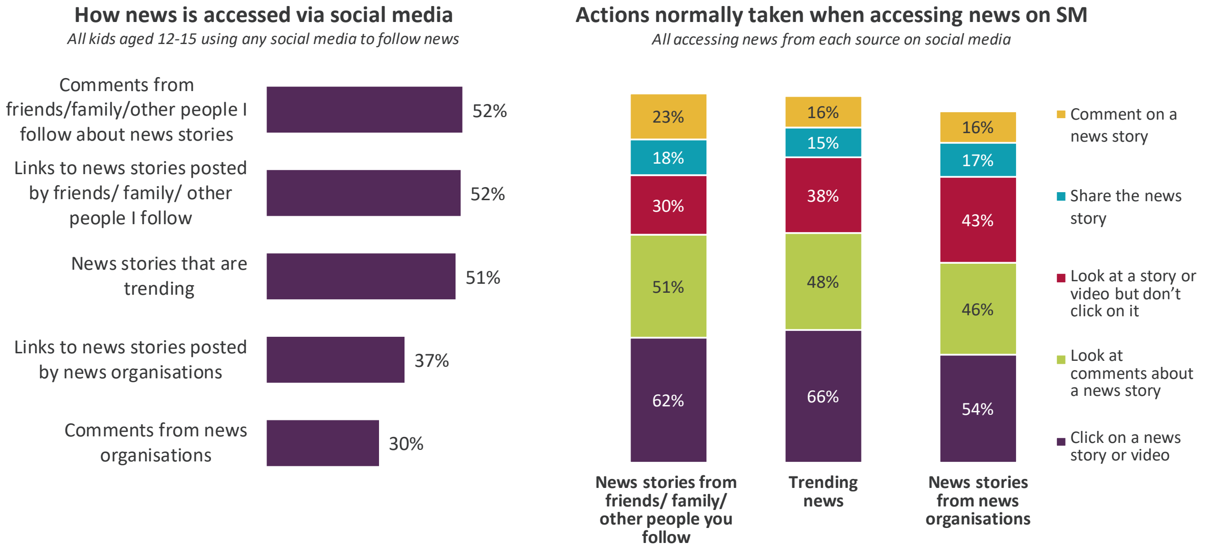
News consumption via social media platforms

The next section set outs the results to specific questions about social media, which we asked in order to gain a deeper understanding of news consumption via this platform.

The most common ways of accessing news via social media is though comments, links and trending news stories

We asked 12-15 year-olds who use social media for news *how* they access news via this platform. The most popular responses were 'comments from friends/family/other people I follow about news stories' and 'links to news stories posted by friends/family/other people I follow' (both 52%). In terms of how these older children interact with the news stories they see on social media, engagement tends to be passive (e.g. looking at comments, looking at or clicking on links). Fewer engage in an 'active' way (e.g. sharing or commenting on news stories).

Figure 71: How news is accessed via social media, and actions normally taken when accessing news on social media, among 12-15s who go online



Source: Ofcom Children's News Consumption Survey 2018

Question: C7. Which, if any, of the following do you read or see on the social media sites or apps you use most often?
Base: All using social media to follow news. 2018=556

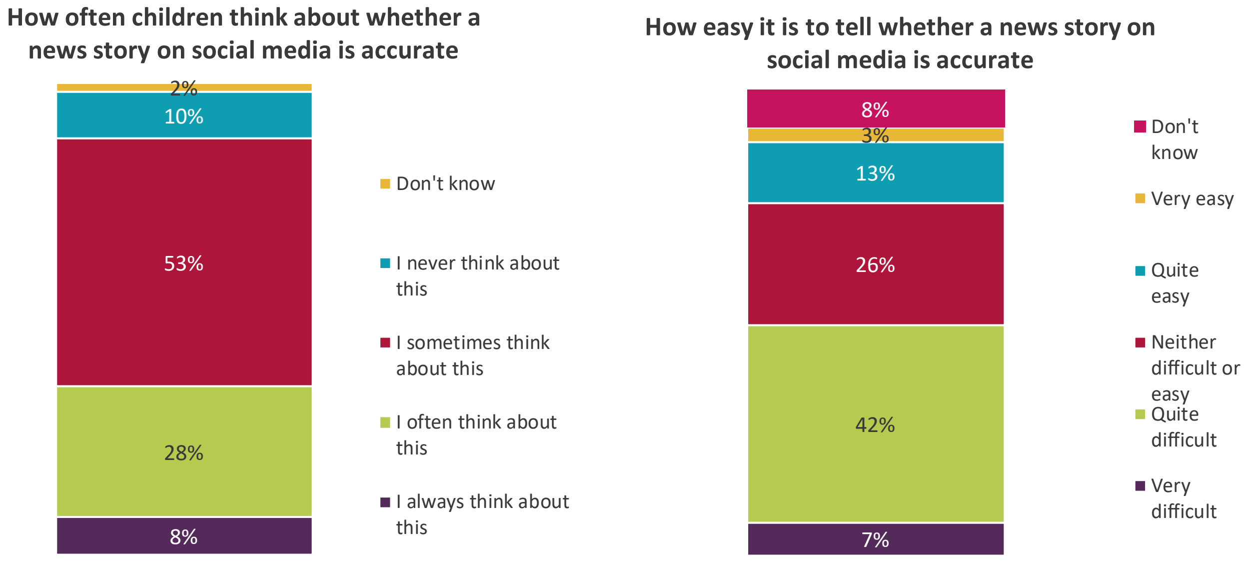
C8. Which, if any, of the following do you do when you read or see XXXX on social media sites or apps?
Base: All accessing news from each source via social media – News stories from friends/family/other people=409, Trending news=281, news organisations=274
Note: Columns do not sum to 100% (this was a multi-code question)

Just over half of children who use social media for news only think about whether news stories on social media are reported truthfully 'sometimes'

With only a third (34%) of 12-15 year-old social media news users believing that news reported via this platform is truthful, it is clear that they recognise that they should think critically when navigating news via social media, and indeed, 89% say they think about whether a news story they have seen on social media is accurate, at least some of the time. Just over half (53%) say they do this 'sometimes', leaving 36% who say they do this often or always.

While 12-15s are aware of concerns relating to news on social media, few (16%) say they find it easy to tell whether a news story on social media is accurate. However, they do not ignore the issue; when we asked them what they do when they read or see a news story on social media and want to check the accuracy of it, only one in ten said they would not take any action. Around half (45%) say they would check if the same news story appeared elsewhere, while 39% say they would look at the comments and 35% would think about the news story to see how likely it is to be true.

Figure 72: Accuracy of news stories accessed via social media among 12-15s who go online



Source: Ofcom Children News Consumption Survey 2018

2018: Question: C9a. 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? C10. How easy or difficult is it to tell whether a news story on social media is true? Base: All using social media to follow news. 2018=556

Around three-quarters say they have heard about fake news and know what it is, and two in five have seen a fake news story

Eight in ten (78%) 12-15s say they had heard of the concept of fake news. While not shown below, the 12-15s who said they had heard of fake news were provided with a description of the term and were asked whether that description matched their understanding of fake news. Overall, three-quarters of all children said that the definition corresponded with their understanding. Four in ten (43%) said they had seen something online or on social media that they considered to be fake news. The most popular action taken in response to this was to tell parents or other family members (32%) while 40% say they probably wouldn't do anything.

Figure 73: Awareness of fake news, and actions taken, among 12-15s who go online

Awareness of 'fake news'

All children aged 12-15

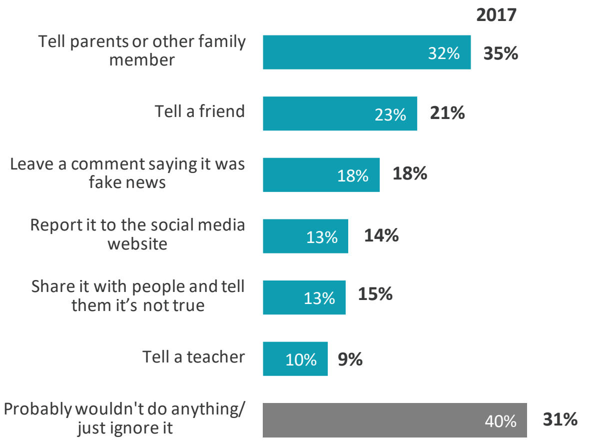
78% have **ever heard** of 'fake news' (22% had not heard of fake news) **(73% in 2017)**

74% are **aware of its meaning** as 'false/made up news stories written deliberately to mislead people' (26% were not aware) **(67% in 2017)**

43% have **seen a news story** online or on social media that they thought was 'fake news' (57% had not seen fake news) **(39% in 2017)**

Actions might take if saw a 'fake news' story online

All children aged 12-15 aware of 'fake news'



Source: Ofcom Children's News Consumption Survey 2018

Question: C12. Have you ever heard of 'fake news'? C13. 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. Is this what you thought 'fake news' was? C14. Have you ever seen anything online or on social media that you thought was a 'fake news' story? Base: All children aged 12-15. 2018=1001

C15. If you did see a story on social media or online that you thought was 'fake news' what, if anythin,g would you do about it? Base: All aware of 'fake news' =785

A9. 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 ever having been 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.

In 2018, as in 2017, children were allowed to opt in to completing the section about bullying and their exposure to online risk; they were also given the option of completing these questions directly through the interviewer's CAPI unit/ tablet[60]. 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 (95%) and 12-15 (96%) recall being told about how to use the internet safely.
- One in six children aged 8-11 (16%) who go online say they have ever seen something online that they found worrying or nasty; 12-15s are twice as likely to say this (31%). Nearly all 8-11s (96%) and nine in ten 12-15s (90%) say they would tell someone if they saw something like this online. Each of these incidences is unchanged since 2017.
- Girls aged 12-15 who go online are more likely than boys to say they have seen something online that they considered worrying or nasty (37% vs. 24%). Girls of this age are, however, more likely than boys to say they would tell someone about this type of content (93% vs. 87%).
- Close to seven in ten of 12-15s who go online say they are aware of online reporting functions (68%), lower than in 2017 (74%). One in eight (13%) have ever reported something they have seen online that they considered to be worrying or nasty, unchanged since 2017.

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[60] 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.

- More than two in five 12-15s who go online (45%) say they have seen something hateful about a particular group of people online in the last 12 months, unchanged since 2017. More than two in five of 12-15s (42%) who have seen hateful content online in the past year said they took some action in response, while most (55%) ignored it.
- While boys aged 12-15 are as likely as girls to say they have ever seen hateful content online, they are more likely to say they 'often' see this type of content (9% vs.4%).
- More than one in five 12-15s (22%) who opted to answer the question[61] 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. Seventeen per cent of children aged 12-15 who opted to answer the question said they had accidently spent money online that they had not meant to; up from 9% in 2017.
- Around one in ten 8-11s (11%) and one in five 12-15s (20%) who opted to answer the question said they had ever personally experienced some form of bullying; unchanged since last year. One in eight 12-15s say they have been bullied, either face-to-face (12%), or on social media (11%). Nine per cent say they have been bullied through messaging apps or by text, twice the 2017 level (5%).
- The incidence of being bullied does not vary by gender, although girls aged 8-11 (3% vs. 0%) and 12-15 (15% vs. 6%) who opted to answer these questions are more likely than boys to say they have been bullied on social media. Boys aged 12-15 are more likely than girls to say they have been bullied through online games (7% vs. 1%).
- Children aged 8-15 in C2DE households who opted to answer the question are more likely than those in ABC1 households to say they know someone who has ever been bullied (38% vs.29%) and to say they have ever personally been bullied (18% vs. 13%).

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[62]. Nearly all children aged 8-11 (95%) and 12-15 (96%) recalled being told about this, unchanged since last year.

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[61] 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 92% of 12-15s opted to complete this section

[62] Since 2017 this question referred to whether the child had ever been told about how to use the internet safely. In 2014 it referred to being given any information or advice about the risks while they are online and in 2011 to being given any

Those who said they had been told were asked who had told them. Children are most likely to recall receiving the information from a parent (78% for 8-11s and 71% for 12-15s) or from a teacher (72% for 8-11s and 75% for 12-15s).

Around one in five 8-15s, or less, mention receiving this information from any other source. Two sources are more likely to be mentioned by 12-15s than by 8-11s: from police coming into school to talk to them (12% vs. 8%) and websites (8% vs. 4%). Children aged 8-11 are more likely than 12-15s to recall being given this information by a parent (78% vs. 71% for 12-15s).

Compared to 2017[63], children aged 8-15 are less likely to say they have received information or advice from a parent (78% vs. 86% for 8-11s and 71% vs. 83% for 12-15s). It is, however, worth noting that for 8-11s this decrease follows an increase between 2016 and 2017[64] not shown in Figure 74, so the incidence shown in 2018 is comparable to that of 2016 for children aged 8-11. Those aged 12-15 are less likely to say they have received information or advice from TV/ radio programmes (4% vs. 7% in 2017).

There are no differences by household socio-economic group in the overall incidence of having been given any information or advice about how to use the internet safely among 8-15s who go online. Children aged 8-15 in AB households are, however, more likely to say they have received information or advice from the police coming to school (16%) and those in DE households are less likely to say this (4%), compared to the average for all 8-15s who go online (10%). Children aged 8-15 in AB households are also more likely than average to say they have received information/ advice from websites (11% vs. 6%).

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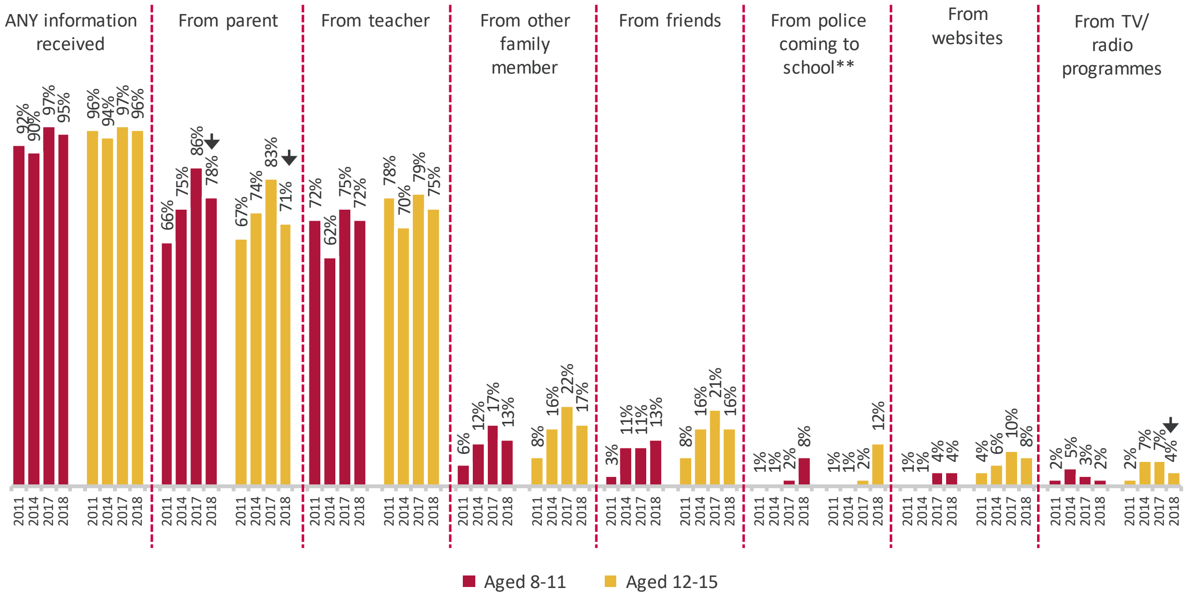
information or advice about how to stay safe when they are online. These amendments may have affected the reported trend.

[63] The increase between 2017 and 2018 among 8-11s and 12-15s for being given information or advice by 'the police coming to school' is statistically significant, but this response option was included in the list of possible responses for the first time this year (rather than being recorded as an 'other' response by the interviewer). As such, this difference may have contributed to the increases shown in the Figure and they have therefore not been flagged as statistically significant.

[64] From 73% in 2016 to 86% in 2017.

Figure 74: Children stating they have been given any information or advice about how to use the internet safely, among those who go online at home (2011) or elsewhere (2014,2017,2018), by age



*QC34 – Has anyone ever told you about how to use the internet safely (since 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.**Added in 2018, please refer to Footnote above.*

Base: Children aged 8-15 who go online (456 aged 8-11, 480 aged 12-15).

Significance testing shows any change between 2017 and 2018.

Since 2017, children aged 8-15 have been given the opportunity to opt in to complete a series of questions about some of the more difficult issues they might have ever encountered; for example, questions relating to their experience of being bullied, and their knowledge and experience of 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[65], i.e. without any interviewer assistance, or whether they would prefer to complete the questions with the interviewer's help. The purpose of this amended approach is twofold: first, 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.

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[65] 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.

Overall, 87% of 8-11s and 92% of 12-15s opted to respond to these questions. Around half of 8-11s (52%) and seven in ten 12-15s (71%) opted to respond directly using the interviewer's tablet, with the remainder responding with the assistance of the interviewer. Each of these incidences in 2018 is comparable to those in 2017.

When the data were 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 75, Figure 81, Figure 82, Figure 83 and Figure 84.

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[66]. Figure 75 shows those activities that were asked about which can be grouped under the heading of 'safe' behaviour.

Seven in ten 12-15s who go online (and opted to answer the question) said they knew how to block messages on social media from someone they didn't want to hear from (70%), with more than half having ever done this (52%).

Half said they knew how to block junk email or spam (50%) while more than two in five (44%) knew how to change the settings so fewer people could view their social media profile. A third had ever done either of these things.

Two in five said they could block pop-up adverts from appearing on-screen (39%) and nearly three in ten (28%) had done this.

Of the four 'safe' online measures shown in Figure 75, four in five 12-15s (79%) said they knew how to do any of them, and two-thirds (65%) had done any of them.

Each of these incidences is unchanged compared to 2017.

Boys aged 12-15 were more likely than girls to say they knew how to block junk email or spam (55% vs. 44%), although they were no more likely to have ever done this.

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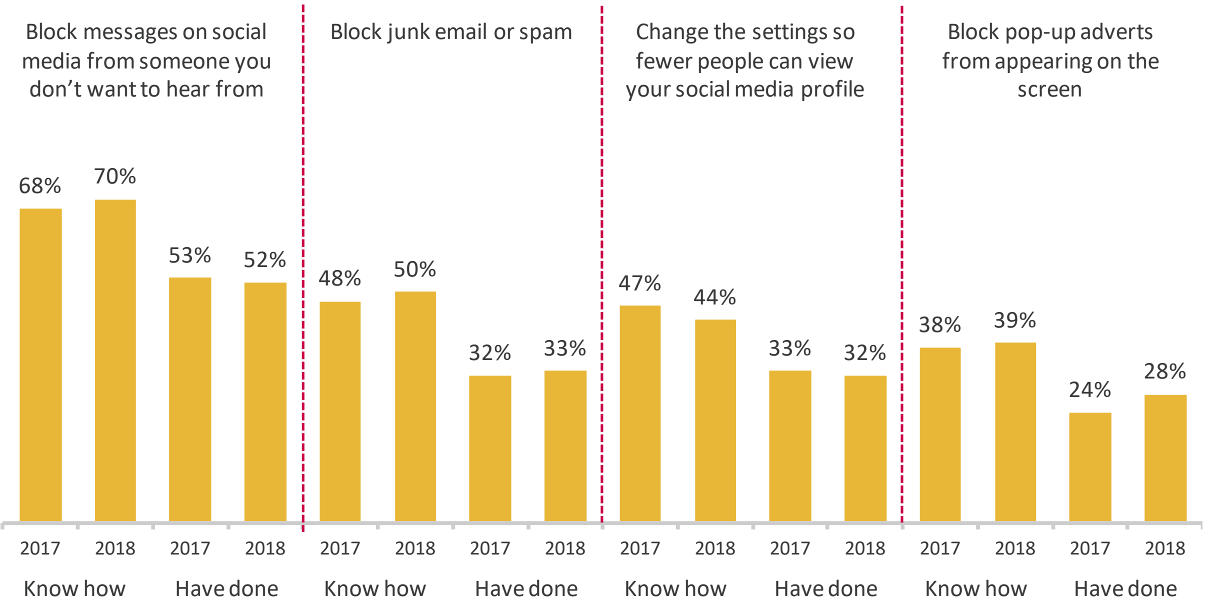
[66] Before 2017 children were asked about whether they had ever done them in the last 12 months, which was amended to whether they had 'ever' done them.

Figure 75: Experience of 'safe' online measures among children aged 12-15: 2017, 2018



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 (440)

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

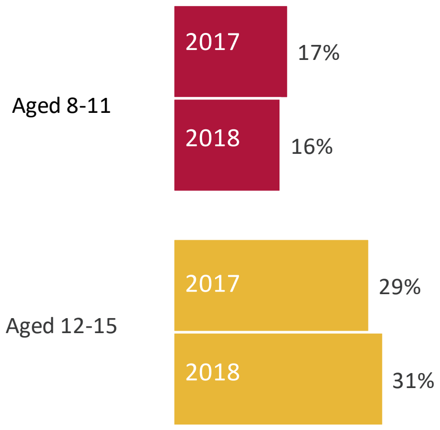
Children aged 8-11 and 12-15 who go online were asked whether they had ever[67] seen anything online that was worrying or nasty in some way that they didn't like, as shown in Figure 76.

One in six of the 8-11s (16%) said they had ever seen something online that was worrying or nasty, with 12-15s twice as likely to say this (31%).

There has been no change in each of these incidences compared to 2017.

Girls aged 12-15 are more likely than boys to say they have seen this type of content (37% vs. 24%).

Figure 76: Child's experience of having ever seen online content that they considered worrying or nasty that they didn't like, by age: 2017, 2018



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 (456 aged 8-11, 480 aged 12-15).

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[67] Before 2017, children were asked whether they had seen anything in the past year. This was amended in 2017 to whether they had 'ever' seen anything.

Internet users aged 8-15 are more likely than in 2017 to say they would confide in a friend if they ever saw worrying or nasty content 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[68]. If they said they would tell someone, they were asked whom that person would be. The responses given by more than 2% of all internet users aged 8-15 are shown in Figure 77.

Eight-11 year-olds (96%) are more likely than 12-15s (90%) to say they would tell someone[69]. A 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. 17%). Twelve-15 year-olds would be more likely than 8-11s to tell a friend (32% vs. 19%) or report it on the website (6% vs. 2%).

Less than one in ten children aged 12-15 or 8-11 say they would not tell anyone if they saw something online that they found worrying or nasty, with this response more likely for 12-15s (7%) than for 8-11s (3%).

Compared to 2017, children aged 8-11 and 12-15 are as likely to say they would tell someone about this type of content. They are, however, more likely to say they would tell a friend (19% vs. 12% for 8-11s and 32% vs. 26% for 12-15s).

Girls aged 8-11 who go online are more likely to say they would tell someone if they saw something online that they found worrying or nasty (98% vs. 93% for boys). They are more likely to report it to a family member (96% vs. 87%) or to a teacher (29% vs. 16%). Girls aged 12-15 are also more likely than boys to say they would tell someone if they saw worrying or nasty content online (93% vs. 87%).

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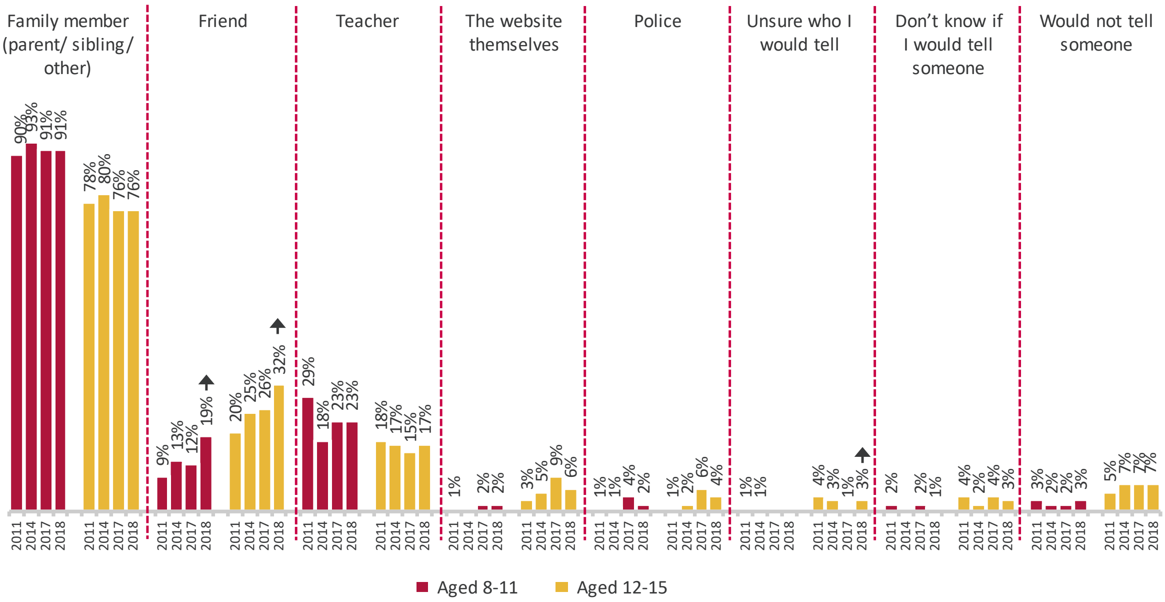
[68] Before 2016, this question referred to the child seeing something online they found 'worrying, nasty or offensive'; this change may affect the reported trend.

[69] Included in this group are the 0% of 8-11s and 3% 12-15s who said they were unsure whom they would tell.

Figure 77: Reporting online content considered by the child to be worrying or nasty, by age: 2011, 2014, 2017, 2018



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 (456 aged 8-11, 480 aged 12-15).

Significance testing shows any change between 2017 and 2018.

Awareness of online reporting functions among 12-15s is lower than in 2017

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[70] 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 76) 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 78, expressed as a proportion of all 12-15s who go online.

Overall, two-thirds of 12-15s (68%) are aware of the online reporting function, lower than in 2017 (74%). Around one in eight 12-15s who go online (13%) said they had ever reported something they had seen online that they considered worrying or nasty, with a similar proportion stating that although they had seen something like this, they had not reported it (12%). More than two in five (43%) are aware of the online reporting function but have not seen anything worrying or nasty online.

Five per cent of 12-15s have seen something worrying or nasty online and are unaware of the online reporting function.

There are no differences by gender in awareness of the online reporting function among 12-15s who go online (67% for boys vs. 70% for girls). However, twice as many girls aged 12-15 have seen something online that is worrying and nasty and not reported it (16% vs. 8% for boys).

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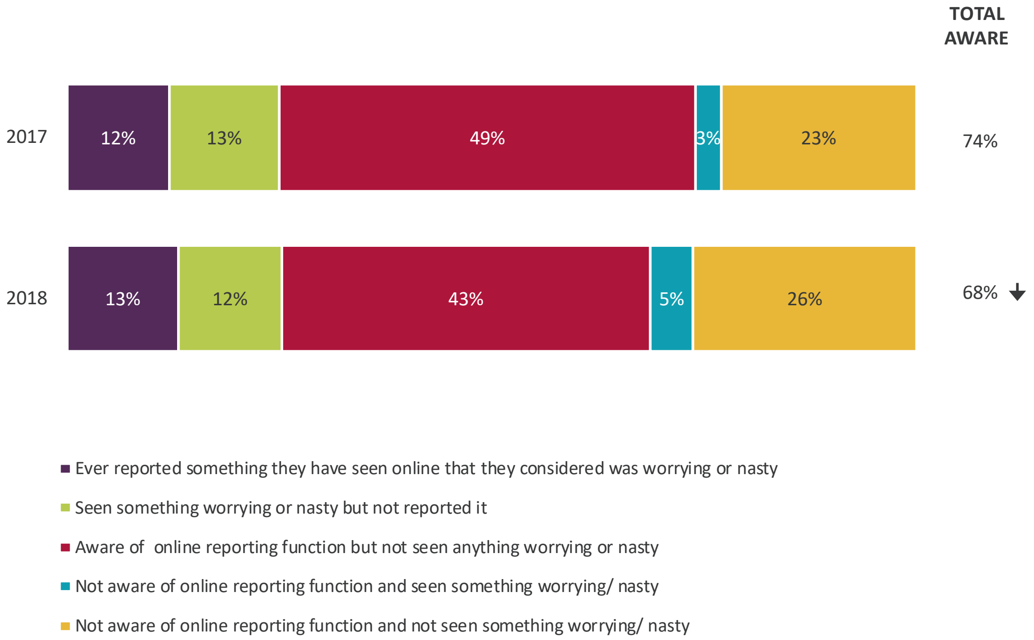
[70] The following definition of the report function was read out to children, if required: 'The report function could be a button, a link, an email address or online form through which you can point out the worrying or nasty content'.

Figure 78: Awareness and use of online reporting function for worrying or nasty online content, among 12-15s: 2017, 2018



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 (480).

Significance testing shows any change between 2017 and 2018.

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

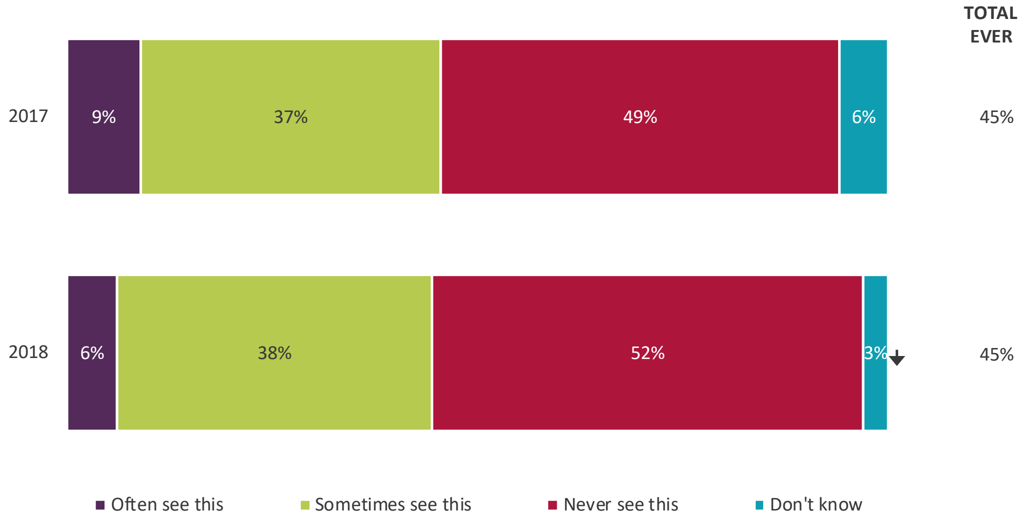
Since 2016, in order to better understand children's exposure to hate speech online, 12-15s who go online have been asked the following question: "In the past year, have you seen anything hateful on the internet that has been directed at a particular group of people, based on, for instance, their gender, 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 79, for all 12-15s who go online.

In 2018, more than two in five of 12-15s said they had seen this kind of hateful content online in the past year (45%). Less than one in ten (6%) said they 'often' see this, with the remaining 38% saying they 'sometimes' see it. Each of these incidences is unchanged since 2017.

There are no differences by gender among 12-15s in the likelihood of ever having seen hateful content online, but boys are more likely than girls to say they 'often' see this type of content (9% vs. 4%) while girls are more likely to say they 'sometimes' see it (43% vs. 34%).

Figure 79: Internet users aged 12-15 who say they have encountered hateful content online in the past 12 months: 2017, 2018



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 (450).

Significance testing shows any change between 2017 and 2018.

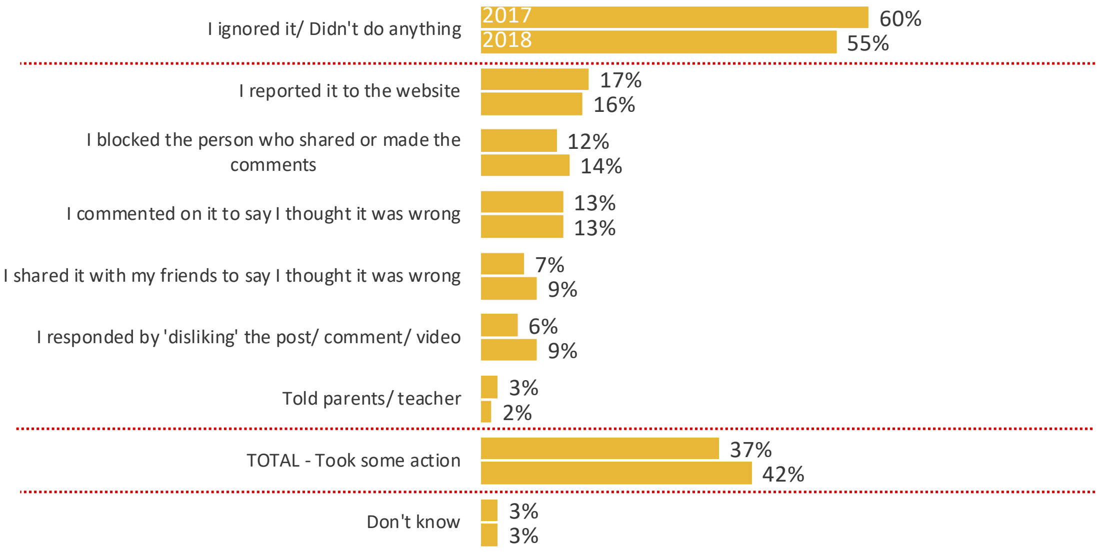
More than two in five of the 12-15s who have seen hateful content online in the past year say they took action in response

Since 2017, 12-15s who said they had seen hateful content online in the past year have been prompted with some possible responses to seeing this type of content, and have been asked what, if anything, they did, the last time they saw something hateful online.

More than half of these 12-15s (55%) said they ignored it or didn't do anything, while 42% took some sort of action as a result of viewing this content. Sixteen per cent said they reported it to the website, while around one in seven said they either blocked the person who made or shared the comments (14%) or commented on the content to say it was wrong (13%). Around one in ten said they shared it with friends or highlighted that they thought it was wrong (9%) and a similar proportion say they 'disliked the post or comment or video' (9%). Two per cent told their parents or a teacher.

There has been no change in the likelihood of taking any action as a result of viewing hateful content, nor in the type of actions taken, compared to 2017.

Figure 80: Actions taken as a result of seeing hateful content online among 12-15s: 2017, 2018



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).

Insight from Cross Platform Media Tracker: attitudes to risk - online and on-demand content

In 2017, Ofcom used its Cross-Platform Media Tracker (CPMT) to explore 12-15 year-olds' attitudes and opinions towards on-demand and online content (ODO content[71]). For simplicity, we sometimes refer to 12-15 year-olds as 'older children' in the following discussion.

Fifteen per cent of 12-15 year-old viewers of ODO content expressed concern about something they had seen on demand or online. When we compared this to the figure for adults who watch ODO content (9%), we saw that there was a higher level of concern among these older children; a pattern that was also evident when we compared the all-adult figure to that for young adults (16 to 34s) 12% of whom said they had seen ODO content that caused them concern.

The concerns that these older children expressed about ODO content centred around offensive language (46%), bullying (28%), seeing something of a sexual nature (25%) and dangerous behaviour (22%)[72]. Interestingly, this mirrors the views of adult ODO content consumers, among whom the top three concerns were also offensive language (36%), bullying (26%) and seeing something of a sexual nature (25%); dangerous behaviour and violence in general are just below these at 21% and 20% respectively. Adult respondents noted similar concerns about the content they watched on TV (with offensive language, sexual content, and violence appearing in the top four types of material cited as offensive). However, a key distinction is that, as set out above, adult ODO content consumers were also concerned about arguably more personal or insidious types of offensive content: bullying and dangerous behaviour.

The most common response among 12-15s who had seen something of concern when watching ODO content was to tell their parents (50%), followed by stopping viewing (41%) and/or telling their friends (33%)[73].

Older children were just as keen to see regulation of ODO content as their adult counterparts. Forty-eight per cent of ODO content consumers aged 12-15 thought that this type of content should be regulated (with 23% saying it should be highly regulated), compared to 45% of adult ODO content consumers (20% of whom said it should be highly regulated). Among both age groups, only around one in ten thought it should either be lightly regulated or not regulated at all.

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[71] By ODO content, we mean TV programmes, films, video clips, video podcasts or anything else watched online or on demand, as opposed to content watched via broadcast TV on a TV set, either at the time it is broadcast or recorded to watch later.

The further away we moved from broadcast television into on-demand services and online content (i.e. less-TV-like content), the more uncertain older children were of the regulatory environment. Seventy-six per cent of 12-15s who watched programmes delivered via catch-up services correctly identified that these services are regulated. But 21% mistakenly thought that long-form videos on websites such as YouTube are regulated, while 16% thought this for short video clips online. In an unprompted response, three in ten of all 12-15s questioned (29%) identified Ofcom as the regulator they thought was responsible for ODO content. This placed Ofcom third in the list behind the broadcasters themselves (54%) and the Government (35%)[74].

Forty-four per cent of older children who consumed ODO content thought that the level of regulation was about right, while 30% said they didn’t know and 22% thought there was too little regulation. Only 3% said there was too much.

A third (33%) of ODO content consumers aged 12-15 were aware that they could flag to the ODO content provider that they did not like their content because it was either offensive or invaded someone’s privacy, and among those whose were aware, 16% overall (i.e. using any device) had used these reporting tools.

A quarter of 12-15s who were asked to verify their age (26%) said that they had ticked the box to indicate they were old enough to access ODO content, even though they were younger than required at the time.

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[72] Caution: these findings are only indicative due to low base size (69) i.e. 15% of all 12-15s who said they watched ODO content.

[73] Ibid.

[74] For clarity, Ofcom regulates some, but not all, on-demand video services, depending on a number of factors such as where the service provider is based and whether the main purpose of the service is to offer ‘television-like’ programmes. Regulated on-demand services are not subject to the full range of rules applying to broadcast television, but have to comply with a set of minimum standards addressing issues such as serious harm to children.

Children aged 12-15s' negative online experiences

12-15s are more likely than in 2017 to say they have ever accidentally spent money online

Children aged 12-15 who opted to answer the question were asked whether they had ever[75] personally experienced, online or through a mobile phone, any of a range of negative experiences[76]. The responses are shown in Figure 81. More than one in three children aged 12-15 (36%) said they had ever had any of the five negative experiences they were asked about.

More than one in five of 12-15s (22%) said they had ever been contacted online by someone they didn't know who wanted to be their friend. One in six had accidentally spent money online that they did not mean to (17%); this response is more likely than last year (9%).

One in ten have either seen or received something scary or troubling online, like a scary video or comment (10%) or have seen something of a sexual nature that made them feel uncomfortable (9%). Three per cent say they have ever felt under pressure to send photos or other information about themselves to someone.

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 seen or received something scary or troubling online, like a scary video or comment (12% vs. 7%).

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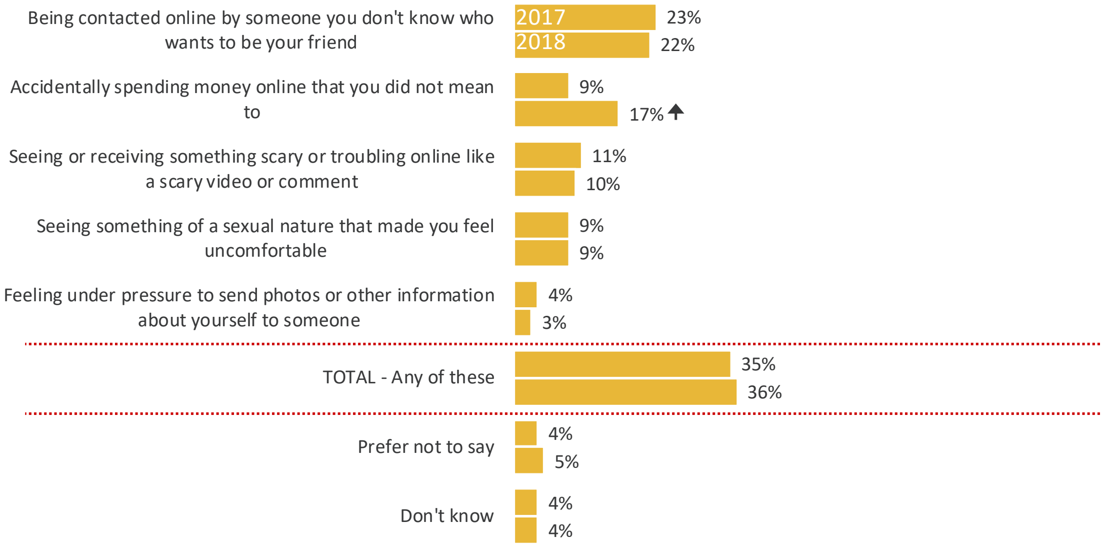
[75] Before 2017, children were asked about their experiences in the past 12 months rather than 'ever'. It is therefore not possible to show a trend before 2017 for this question.

[76] The face-to-face nature of the survey and the sensitive topic may have resulted in some under-reporting in response to this question.

Figure 81: Experience of negative types of online/ mobile phone activity, among children aged 12-15: 2017, 2018



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 (444).

Significance testing shows any change between 2017 and 2018.

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.

The definition of bullying that is read out to children was amended in 2016[77], as qualitative research[78] 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'.

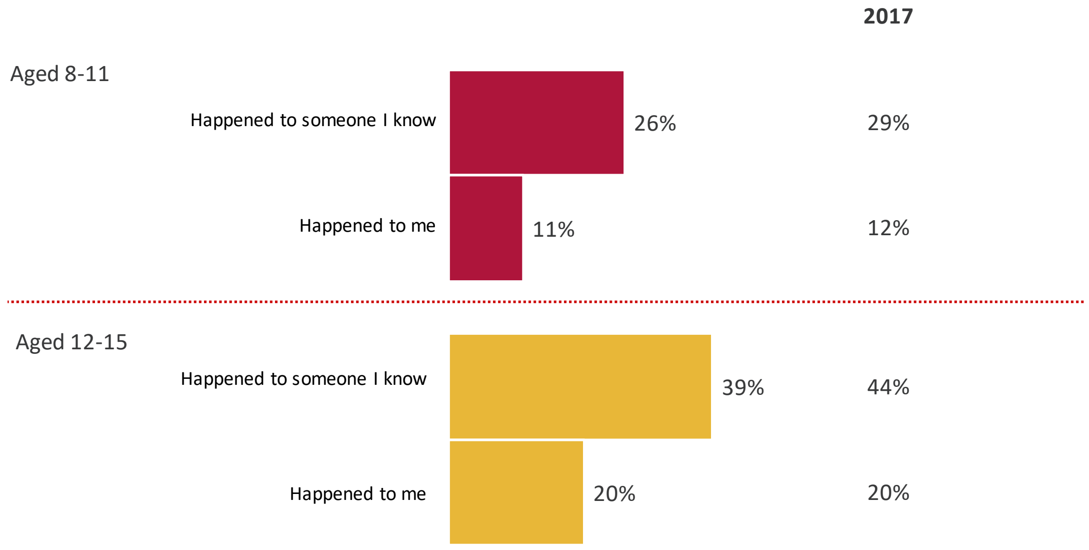
Figure 82 shows that in 2018 one in ten 8-11s (11%) and a fifth of 12-15s (20%) who opted to answer the question said they had ever been bullied[79]. Children in both age groups are twice as likely to know of someone who has been bullied (26% for 8-11s and 39% for 12-15s).

Compared to 2017, children aged 8-11 or 12-15 are no more (or less) likely to say they have ever been bullied or that they know of someone who has been bullied.

There are no differences by gender among either 8-11s or 12-15s in the reported incidence of ever having been bullied.

Children aged 8-15 in C2DE households who opted to answer the question are also more likely than those in ABC1 households to say they know someone who has been bullied (38% vs. 29%) and to say they themselves have been bullied (18% vs. 13%).

Figure 82: Experience of being bullied, by age: 2017, 2018



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[77] It is not, however, possible to show a trend before 2017 due to the amendments in methodology outlined earlier in this section. The focus of the question also shifted in 2017 from asking about the child's experience in the past year to whether they had 'ever' experienced this type of bullying.

[78] 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/

[79] The face-to-face nature of the survey and the sensitive topic may have resulted in some under-reporting in response to this question.

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, 444 aged 12-15).

Compared to last year, 12-15s are twice as likely to say their bullying has been via messaging apps or texts

Children aged 8-11 and 12-15 who said they had ever experienced any type of bullying were 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 83, expressed as a proportion of all children aged either 8-11 or 12-15 who opted to answer the question.[80]

Figure 83 shows that in 2018, 7% of 8-11s and 12% of 12-15s say they have been bullied in person/ face to face. One in ten 12-15s (11%) say they have been bullied on social media, although this is much less likely for 8-11s (1%). Children aged 12-15 are also three times as likely as 8-11s to say they have been bullied through messaging apps or by text (9% vs. 3%). Bullying by photo message or video is also more likely among 12-15s (5%) than among 8-11s (2%).

Four per cent of 8-11s and of 12-15s say they have been bullied through online games.

Compared to last year, 12-15s are nearly twice as likely to say this has been through messaging apps or by text (9% vs. 5% in 2017).

Girls who opted to answer the question are more likely than boys to say they have been bullied through social media, whether they are aged 8-11 (3% vs. 0% for boys) or 12-15 (15% vs. 6%). Boys aged 12-15 are more likely than girls to say they have been bullied through online games (7% vs. 1%).

Children aged 8-15 in DE households are more likely than average to say they have been bullied by messaging app or text (10% vs. 6%) or through online games (8% vs. 4%).

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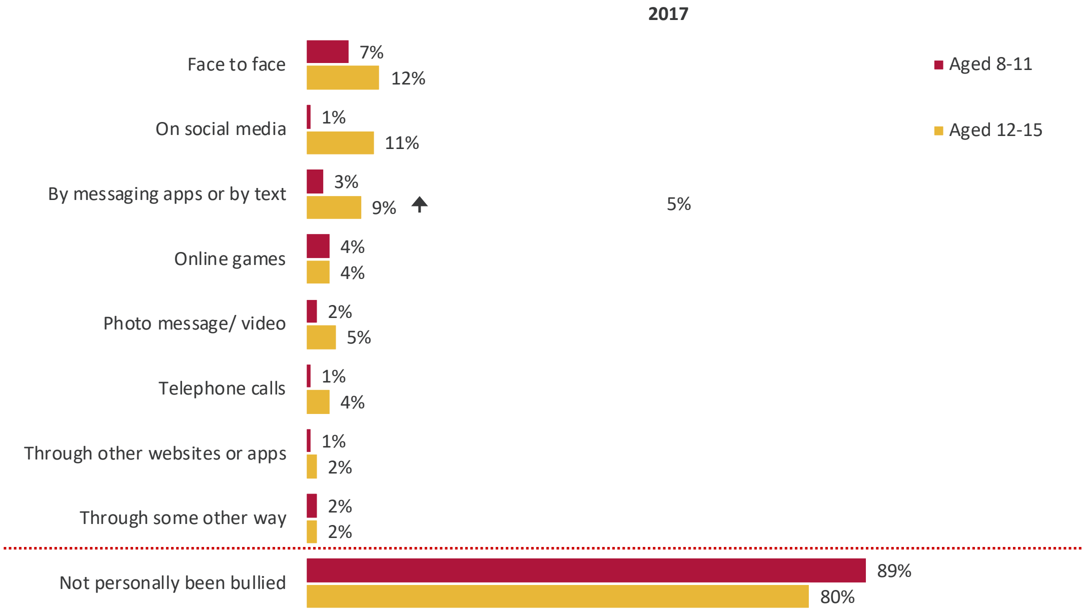
[80] It is not possible to express these incidences of bullying as a proportion of those that had been bullied, due to the low base size of 8-11s and 12-15s who had personally experienced any type of bullying.

Figure 83: Type of bullying experienced, by age: 2017, 2018



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). Significance testing shows any change between 2017 and 2018.

Potentially risky online behaviour

Nearly a quarter of internet users aged 12-15 have deleted their browser history

Children aged 12-15 who go online and 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 84 shows the activities asked about which could be grouped under the heading of 'risky' behaviour[81].

More than two in five 12-15s (43%) said they knew how to delete their browsing history; more than one in five hade ever done this (23%). Two in five (41%) said they knew how to use a web browser in privacy mode, while half of these (21%) had ever done this.

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[81] However, it is worth noting that the first two activities shown in the Figure: 'delete the history records of which websites you have visited' and 'choose to use privacy mode/incognito mode on a web browser' could, from a data privacy perspective, be considered 'safe' behaviour, if the child's intention for using these tools was to manage who has access to their personal data.

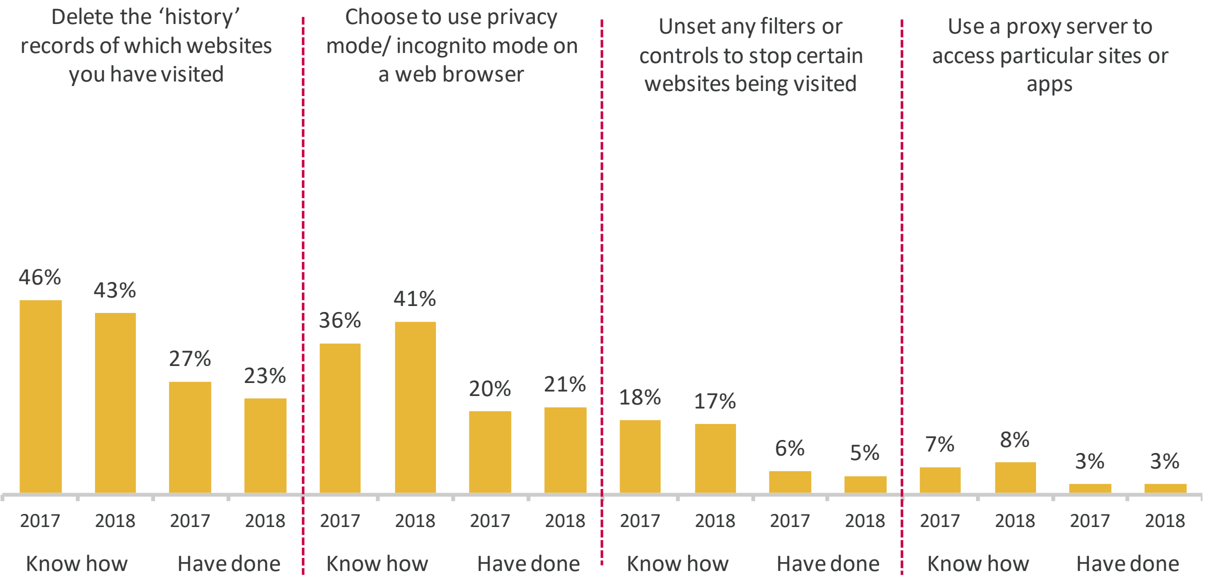
Fewer 12-15s said they knew how to disable online filters or controls (17%) and only 5% said they had ever done this, while 8% knew how to use a proxy server to access particular sites or apps and around half of them had ever done this (3%).

Of the four 'risky' measures shown in Figure 84, more than half the children (56%) know how to do any of them, while a third (34%) have ever done any of them.

Each of these incidences is unchanged since 2017.

While they are no more likely to say they know how to unset any filters or controls that prevent certain websites being visited, boys aged 12-15 are more likely than girls to say they have ever done this (8% vs. 3%).

Figure 84: Experience of 'risky' online measures among children aged 12-15: 2017, 2018



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 and who opted to answer the question (440).

A10. Parents' attitudes and concerns

This section looks at parents' attitudes towards various aspects of their child's use of media. In particular, it assesses the extent to which they have specific concerns about: television programmes, the internet, mobile phones, and games that their children play on media devices, 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

- As in 2017, nearly four in ten parents of 5-15s whose child undertakes each activity are concerned about the time their child spends playing games, using their mobile or going online. More than a quarter (28%) are concerned about the time their child spends watching television.
- However, the majority of parents of children aged 3-15 (as opposed to just those whose children use these media) agree with the statement: "I think my child has a good balance between screen time and doing other things" (85% for 3-4s, 81% for 5-7s, 76% for 8-11s, 62% for 12-15s). Each of these incidences is unchanged since last year.
- As in 2017, managing screen time gets more difficult as children get older. While 19% of parents of 3-4s agree that they "find it hard to control their child's screen time", this increases to 44% of parents of 12-15s. Since last year, parents of 3-4s are more likely to say they find it hard to control their child's screen time (19% vs. 12%).
- Compared to last year, parental concerns about the amount and content of TV advertising seen by their child are unchanged; around three in ten parents of 3-4s and 5-15s say they are concerned about each of these aspects.
- Around a third of parents of 5-15s are also concerned about the media content their children encounter, whether gaming content, online content or television content.
- Concerns about the content of the games their child plays have increased since 2017 among parents of 3-4s (25% vs. 10%) and 5-15s (34% vs. 29%).
- The majority of parents whose child goes online agree that they know enough to help their child stay safe online. Although parents whose children go online continue to be more likely to agree than to disagree that the benefits of the internet outweigh the risks, agreement continues to decrease among parents of 5-15s (54% vs. 58% in 2017).
- A minority of parents of 5-15s (27%) say they are concerned about what their child has seen on pre-watershed television; this is unchanged since last year.

- Parents of 3-4s are more likely than in 2017 to have concerns about seven of the nine online concerns asked about, with the biggest rise in concern being about pressure to spend money online (31% vs. 21%). Parents of 5-15s are more likely to be concerned about three of these nine potential online concerns; the steepest rise in concern is also the pressure on their child to spend money online (41% vs. 35%).
- Concerns among parents of both 3-4s and 5-15s about their child’s gaming are higher than in 2017 regarding gaming content, the possibility of their child being bullied by other players, the amount of advertising in games, and, the pressure to make in-game purchases. Parents of 3-4s are more likely to be concerned about the time their child spends gaming.

Parents’ attitudes to the time their child spends using media

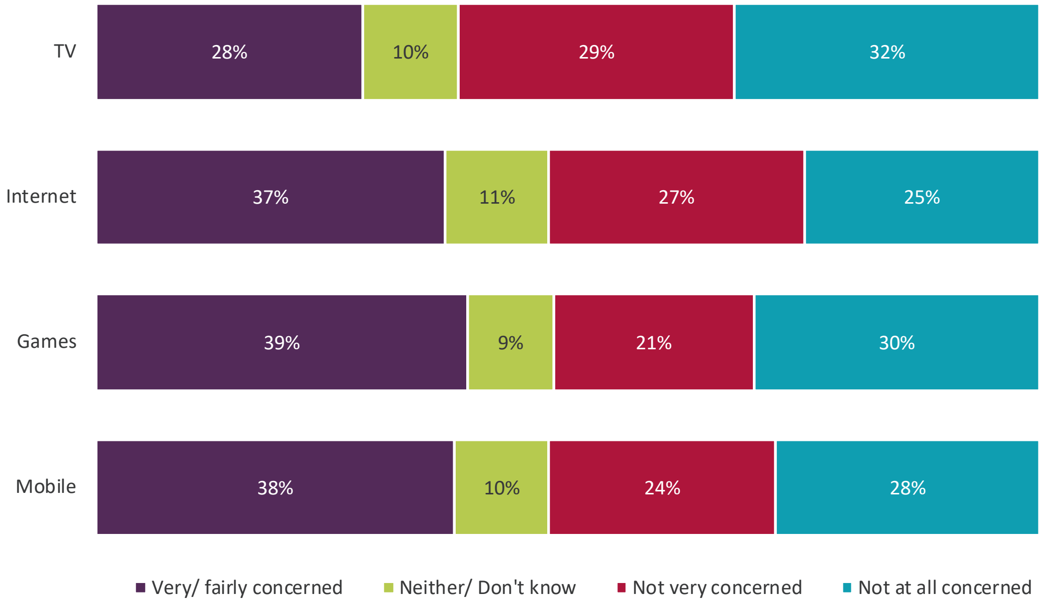
Parents of 3-4s (since 2013) and parents of 5-15s (since 2009) were asked about the extent to which they were concerned about various aspects of their child’s use of media. One aspect relates to the amount of time their child spends watching television (on any device), going online, playing games and using a mobile phone. These concerns are discussed in more detail later in this section but are summarised in Figure 85 for parents of children aged 5-15, while the responses from parents in each age group from 3 to 15 are shown in Figure 86.

In 2018 (as in 2017), 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 87 and Figure 88**.**

Close to four in ten parents of 5-15s who use these media are worried about the time their child spends playing games, using their phone or going online

As shown in Figure 85, in 2018 four in ten parents of 5-15s whose child plays games (39%) are concerned about the time their child spends gaming. A similar proportion (38%) of parents of 5-15s whose child has a mobile are concerned about the time their child spends using their phone. Close to four in ten parents whose child goes online (37%) are concerned about the time their child spends online. Parents are least likely to be concerned about the time their child spends watching television (28%).

Figure 85: Concerns about time spent using media, among parents of 5-15s using each medium: 2018



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)

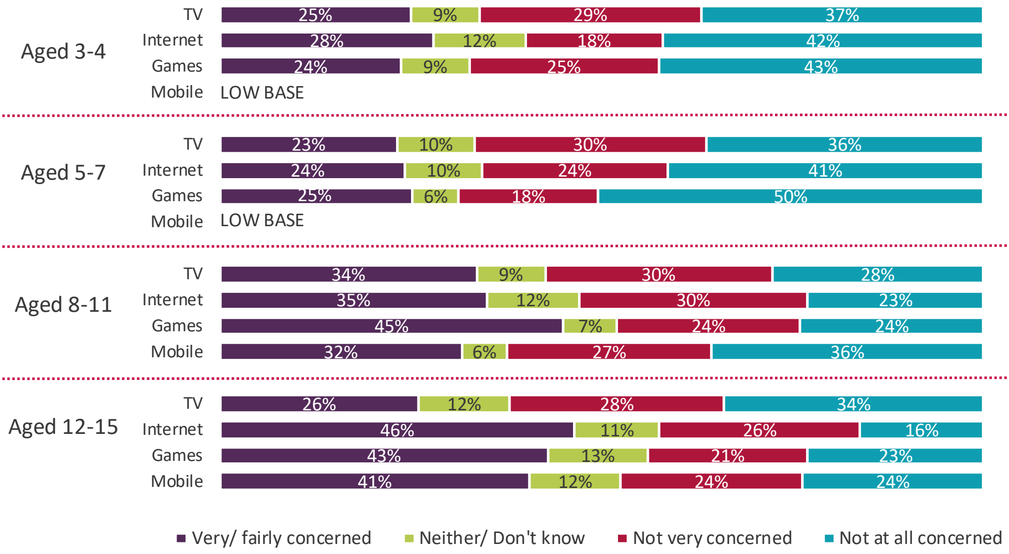
Base: Parents of children whose child watches TV (1411 aged 5-15)/ goes online (1304 aged 5-15)/ plays games (1012 aged 5-15)/ with their own mobile phone (627 aged 5-15).

As shown in Figure 86, parents of 3-4s and 5-7s are equally concerned about the time their child spends online, watching television, and playing games.

Parents of 8-11s are most likely to be concerned about the time their child spends playing games (45% are very/ fairly concerned), while around a third are concerned about their time spent going online, 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.

Details on the trends over time for each of these age groups are shown later in this section: at Figure 100 for time spent watching television, at Figure 110 for time spent online, at Figure 114 for time spent using their mobile phone, and at Figure 121 for time spent gaming.

Figure 86: Concerns about time spent using media, among parents of 3-4s, 5-7s, 8-11s and 12-15s using each medium: 2018



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 (616 aged 3-4, 441 aged 5-7, 492 aged 8-11, 478 aged 12-15)/ goes online (328 aged 3-4, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15)/ plays games (228 aged 3-4, 277 aged 5-7, 368 aged 8-11, 367 aged 12-15)/ with their own mobile phone (183 aged 8-11, 415 aged 12-15).

One in five parents of 3-4s agree that they find it hard to control their child's screen time, an increase since 2017

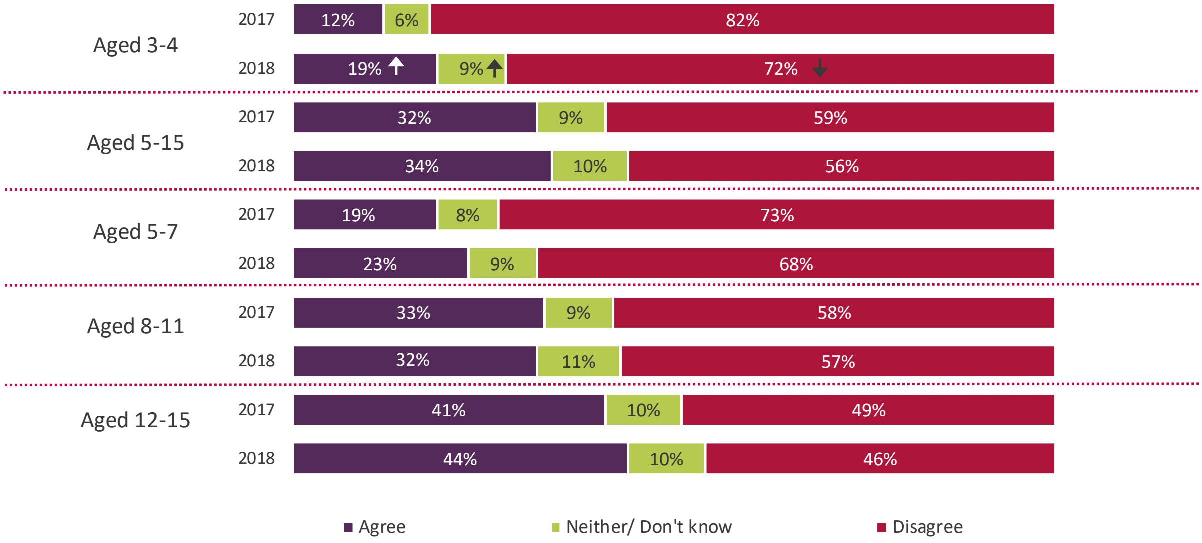
Since 2016 we have asked questions to assess parental attitudes towards screen time - the time spent looking at screens on all the devices used, including TV, mobiles, laptops, tablets and games players.

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 87 and Figure 88:

- "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 87, a majority of parents of 3-4s (72%), 5-7s (68%) and 8-11s (57%) disagree that they find it hard to control their child's screen time. This falls to 46% of parents of 12-15s disagreeing. The number who agree that they find it hard to control their child's screen time are therefore in the minority for each age group, with agreement lower for 3-4s (19%) and 5-7s (23%), compared to 8-11s (32%) and 12-15s (44%). The extent to which parents agree with this statement is unchanged compared to 2017, for 5-7s, 8-11s and 12-15s; parents of 3-4s are, however, more likely to agree (19% vs.12%).

Figure 87: Parental agreement with "I find it hard to control my child's screen time", by age: 2017, 2018



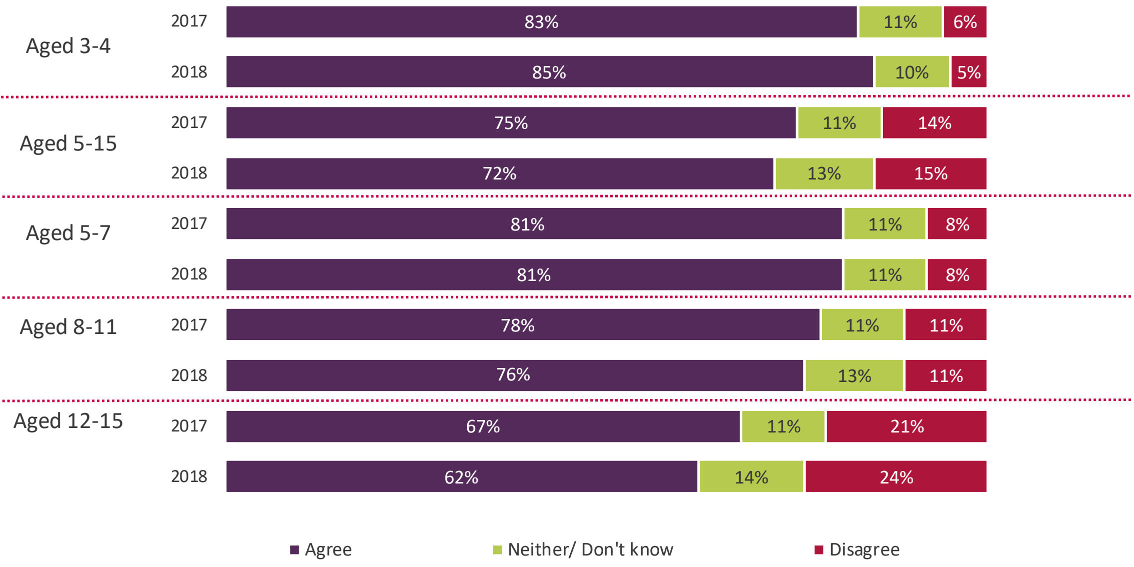
QP75A – I'd now like to ask you some questions about your child's screen time. By screen time I mean the time your child spends looking at screens on all the different devices they may use, including TV, mobile phones, laptops, tablets and gaming devices.

Base: Parents of children aged 3-4 (630) or 5-15 (1430 aged 5-15, 448 aged 5-7, 497 aged 8-11, 485 aged 12-15). Significance testing shows any change between 2017 and 2018.

As shown in Figure 88, a majority of parents of each age group agree with the statement "I think my child has a good balance between screen time and doing other things". More than four in five parents of 3-4s agree (85%) as do four in five parents of 5-7s (81%) and three-quarters (76%) of parents of 8-11s. Agreement is lowest for 12-15s (62%), and as such, nearly a quarter of parents of 12-15s (24%) disagree with this statement. Parental attitudes in response to this statement are unchanged since 2017.

In 2018, parents of girls aged 8-11 are more likely than parents of boys to agree with this statement (81% vs. 72%).

Figure 88: Parental agreement with "I think my child has a good balance between screen time and doing other things", by age: 2017, 2018



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 (630) or 5-15 (1430 aged 5-15, 448 aged 5-7, 497 aged 8-11, 485 aged 12-15).

Children aged 12-15 are more likely than in 2017 to agree that they find it hard to control their own screen time

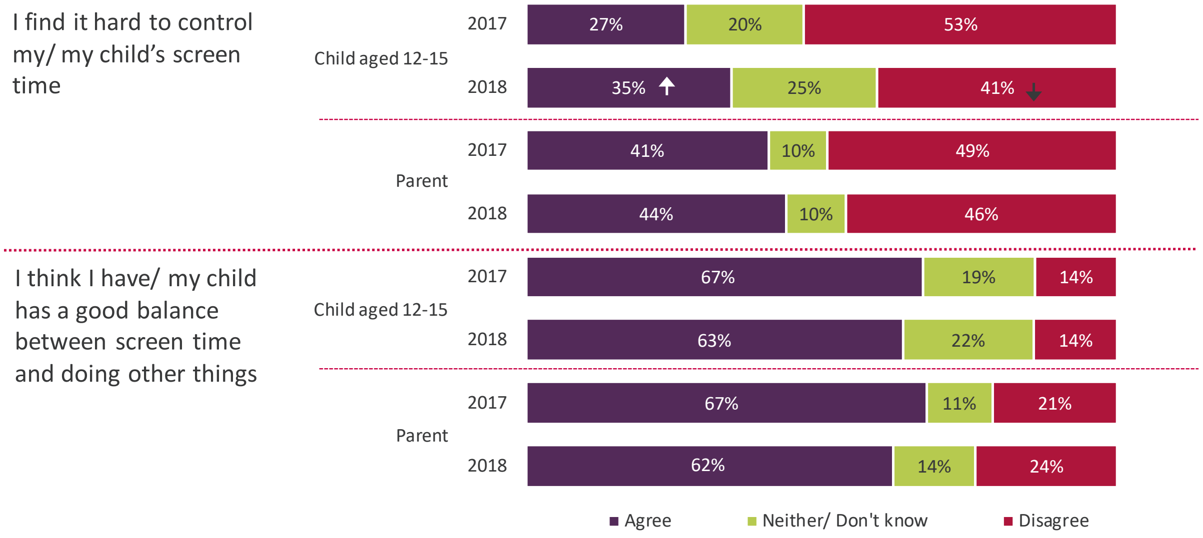
In addition to asking parents the extent to which they agreed or disagreed with the statements regarding their child’s screen time, children aged 12-15 were asked how they felt about their own screen time. Figure 89 shows the responses to each of the statements in 2017 and in 2018: the child aged 12-15’s response, followed by the parental response.

Four in ten children aged 12-15 (41%) disagree with the statement “I find it hard to control my screen time”, while more than a third (35%) agree with this statement. As in 2017, parents of 12-15s (44%) 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 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: a similar proportion of 12-15s (63%) agree with this statement, compared to this group’s parents (62%).

Compared to 2017, children aged 12-15 are more likely to agree that they find it hard to control their screen time (35% vs. 27%).

Figure 89: Agreement with attitudinal statements about screen time for children aged 12-15, child and parent responses: 2017 and 2018



QP75A/B/ QC51A/B – 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 and children aged 12-15 (485). Significance testing shows any change between 2017 and 2018.

Parental attitudes to advertising

Three in ten parents say they are concerned about the amount and content of TV advertising seen by their child

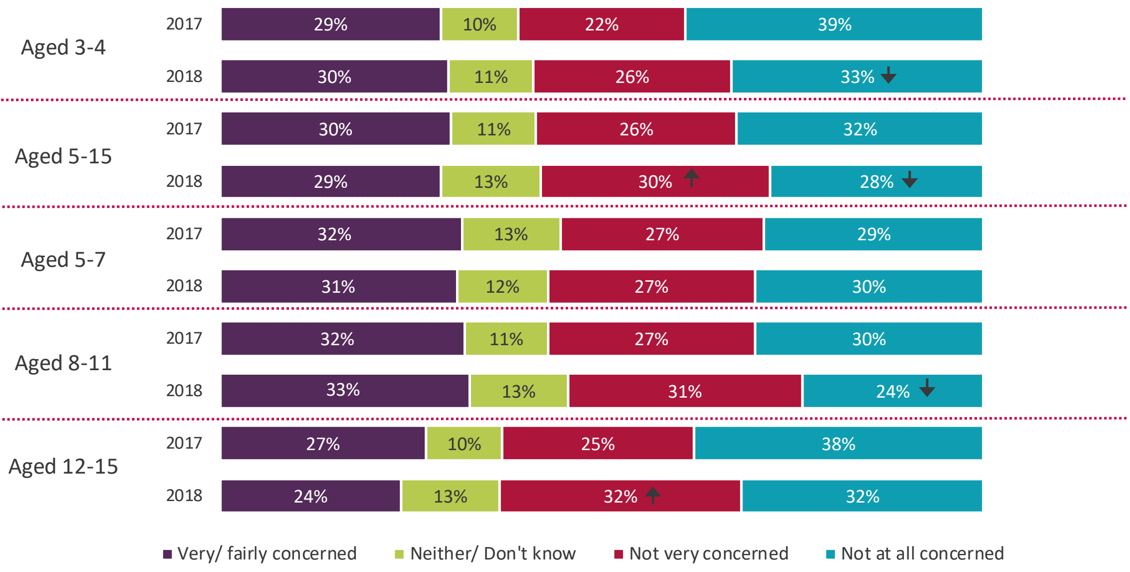
Since 2016, parents have been asked some questions about advertising. As shown in Figure 90 and Figure 91, parents of children aged 3-15 are most likely to say they are not very, or not at all, concerned about the amount or content of the TV advertising that their child sees. Parents with children in each of the four age groups are equally concerned about the amount of TV advertising as they are about the content of TV advertising. Both these findings are consistent with the results from 2017.

For each measure parents of 3-4s, 5-7s and 8-11s are more likely than parents of 12-15s to be concerned.

Compared to 2017, parents of 3-4s and parents of 5-15s are less likely to say they are 'not at all' concerned about the amount of TV advertising and the content of this advertising.

Parents of 3-4s in ABC1 households are more likely than those in C2DE households to say they are concerned about the amount of TV advertising (34% vs. 26%).

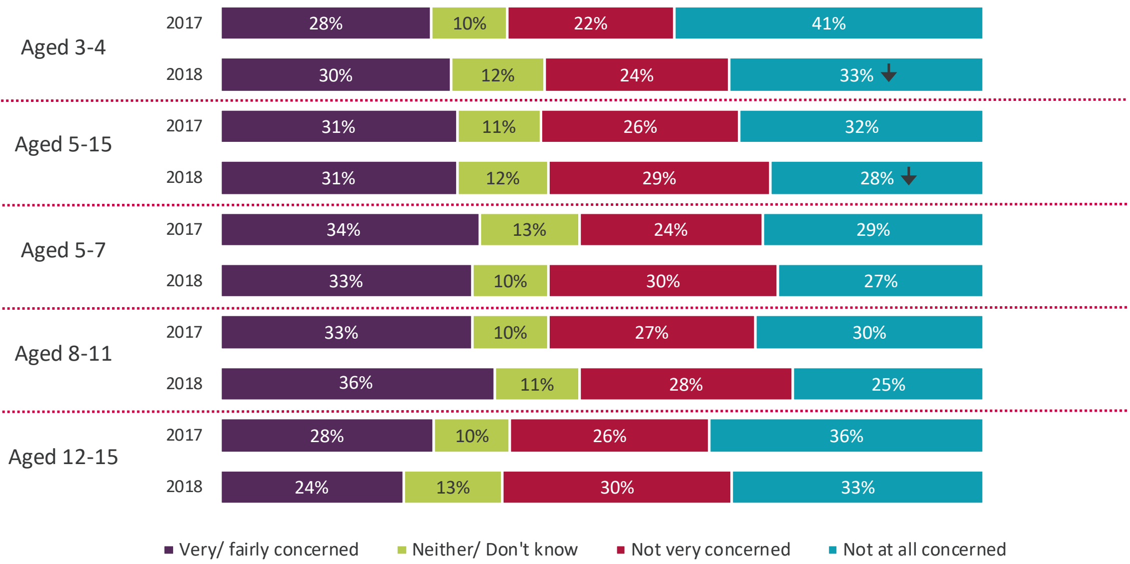
Figure 90: Parents' concerns about the amount of TV advertising seen by their child: 2017, 2018



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 (616 aged 3-4, 1411 aged 5-15, 441 aged 5-7, 492 aged 8-11, 478 aged 12-15). Significance testing shows any change between 2017 and 2018.

Figure 91: Parents' concerns about the content of TV advertising seen by their child: 2017, 2018



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 (616 aged 3-4, 1411 aged 5-15, 441 aged 5-7, 492 aged 8-11, 478 aged 12-15). Significance testing shows any change between 2017 and 2018.

Three-quarters of parents of 5-15s say their child has ever asked them to buy something after seeing it advertised on TV – comparable to 2017

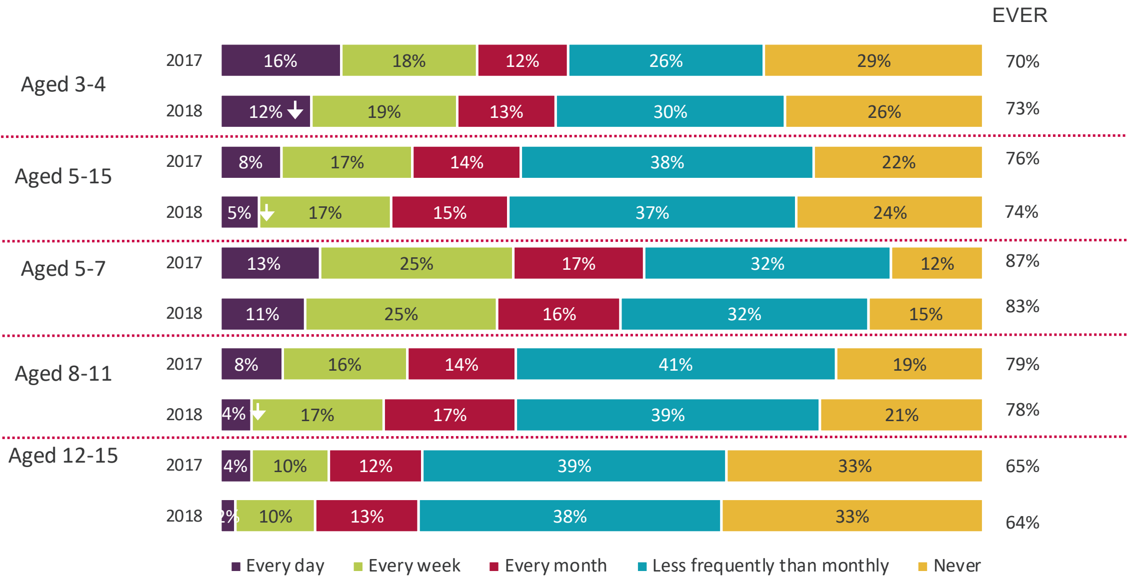
Parents of children who watch television were asked: "In the past 12 months has your child asked you to buy something because they've seen it advertised on TV?". The results are shown in Figure 92.

Three-quarters of parents of 3-4s (73%) and 5-15s (74%) whose child watches television say their child has ever asked them to buy something as a result of TV advertising. As shown in Figure 92, parents of 12-15s (64%) are less likely to report this than parents of 3-4s (73%), 5-7s (83%) or parents of 8-11s (78%). And parents of 5-7s are twice as likely (51%) as parents of 12-15s (26%) to say their child has asked them to buy something *at least monthly*, as a result of TV advertising.

Compared to 2017, parents of 3-4s (12% vs. 16%) and 8-11s (4% vs.8%) are less likely to say their child has made requests *on a daily basis* prompted by TV advertising.

There are no differences by household socio-economic group in terms of a child ever asking their parent to buy something as a result of TV advertising. However, compared to the average (22%), parents of 5-15s in AB households are less likely to say their child does this on a weekly basis (13%) while parents in DE households are more likely to say this (28%). Parents of 3-4s in C2DE households are more likely to say their child does this on a weekly basis than those in ABC1 households (38% vs. 23%).

Figure 92: Frequency with which parents whose child watches TV have been asked to buy something due to television advertising, by age: 2017, 2018



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 (616 aged 3-4, 1411 aged 5-15, 441 aged 5-7, 492 aged 8-11, 478 aged 12-15). Significance testing shows any change between 2017 and 2018.

Parents’ attitudes towards media content

Around a third of parents of 5-15s are concerned about the TV, gaming and online content their child engages with

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[82], 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[83]. Figure 93 shows responses from parents of children aged 5-15, while Figure 94 shows responses from parents of children in each age group from 3 to 15.

Around a third of parents of 5-15s are concerned about gaming (34%), online (32%) or TV (30%), content. As shown in Figure 94, around a quarter of parents of 3-4s are concerned about gaming (25%), online (24%) or TV content (23%). Concern about gaming, online and TV content is lower among parents of 3-4s than among parents of 8-11s and 12-15s.

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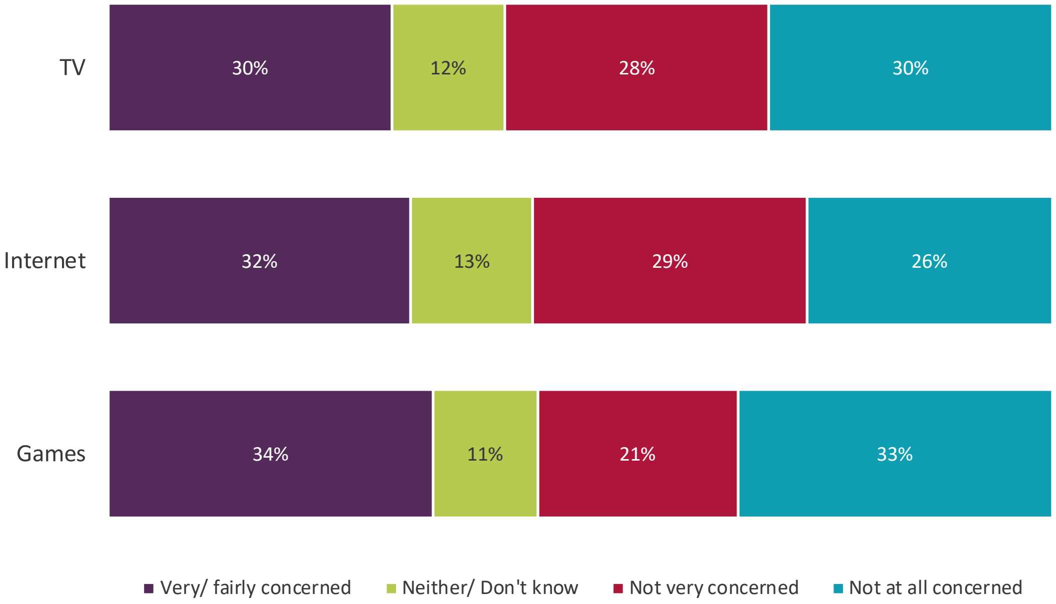
[82] There has been a change in the survey’s focus since 2014: moving from a child’s use of media ‘at home’ in previous years to ‘at home or elsewhere’.

[83] The comparisons are drawn between users of each medium, as opposed to being based on all parents.

Parents of 3-4s, 5-7s and 8-11s are equally concerned about TV, online and gaming content, while parents of 12-15s are more concerned about gaming content (37%) than TV content (29%).

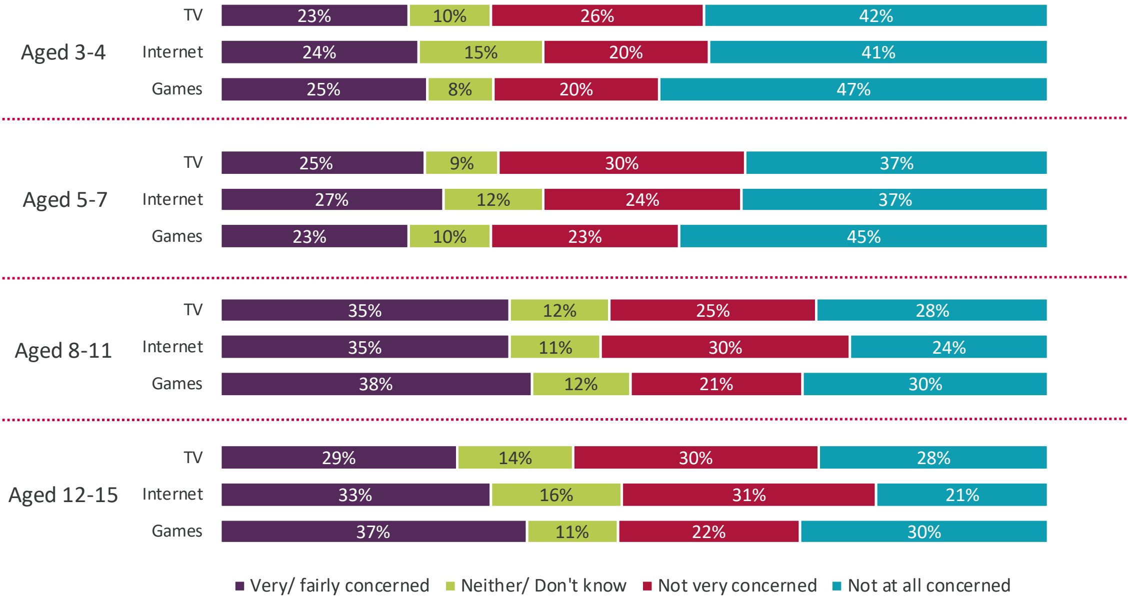
Figure 93: Concerns about media content, among parents of 5-15s using each medium: 2018



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 (1411 aged 5-15)/ goes online at home or elsewhere (1304 aged 5-15)/ plays games (1012 aged 5-15).

Figure 94: Concerns about media content among parents of 3-4s, 5-7s, 8-11s and 12-15s using each medium: 2018



QP13A/ QP51A/ QP74A - Please tell me the extent to which you are concerned about these aspects of your child's TV content viewing/ online activities/ games playing? (prompted responses, single coded)

Base: Parents whose child watches TV (616 aged 3-4, 441 aged 5-7, 492 aged 8-11, 478 aged 12-15)/ goes online at home or elsewhere (328 aged 3-4, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15)/ plays games (228 aged 3-4, 277 aged 5-7, 368 aged 8-11, 367 aged 12-15).

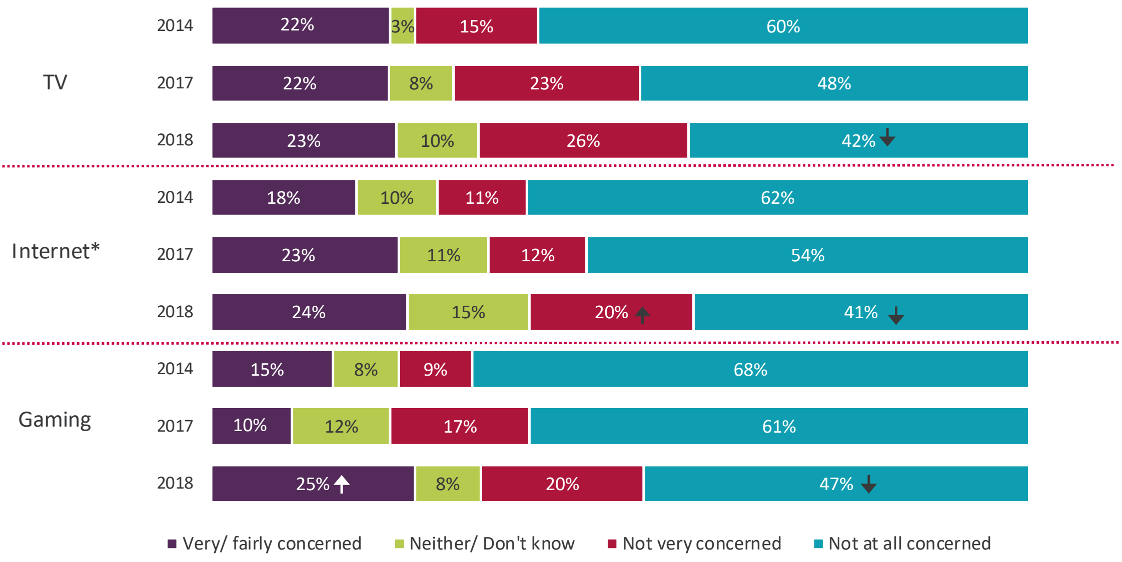
Parents of 3-4s and 5-15s are more likely than in 2017 to be concerned about gaming content

Figure 95 shows trends over time for concerns about television, online and gaming content among parents of users aged 3-4, while Figure 96 shows concerns over time among parents of users aged 5-15.

Since 2017 there has been an increase in the proportion of parents of 3-4s (25% vs. 10%) and 5-15s (34% vs. 29%) who say they are concerned about the content of the games their child plays. While there has been no change in the proportion of parents of 3-4s who say they are concerned about TV or internet content, parents are less likely to say they are 'not at all' concerned: 42% vs. 48% for TV content and 41% vs. 54% for online content. Parents of 5-15s are also less likely to say they are 'not at all' concerned about online content (26% vs. 30%).

More details on the trends for each of these age groups are shown later in this section: at Figure 97 for television content, Figure 111 for online content, and Figure 116 for gaming content.

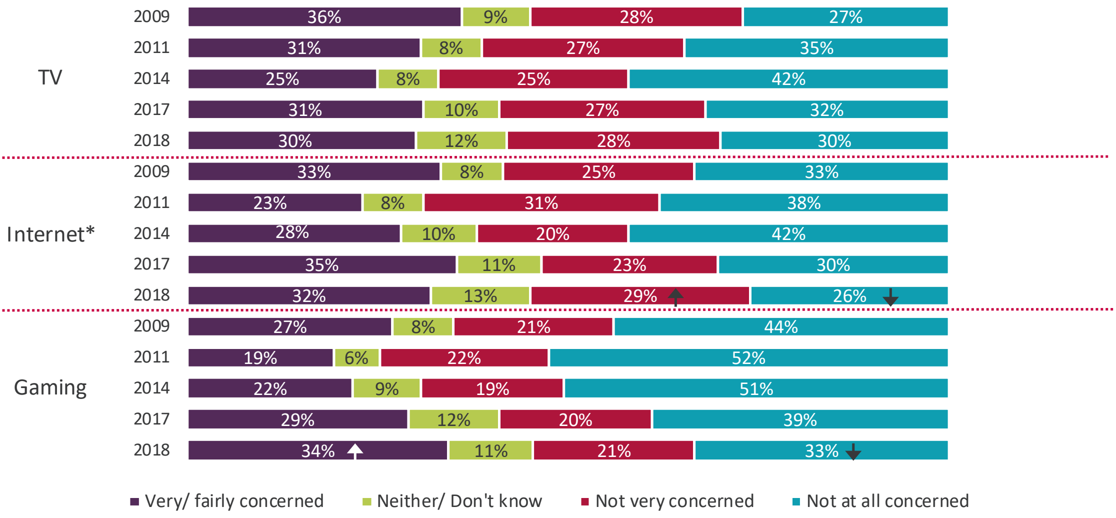
Figure 95: Parental concerns about media content, among parents of 3-4s using each media type at home or elsewhere (2014, 2017, 2018)



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). Since 2015 the question for the internet asked about 'The content on the websites or apps that they visit'. Before this it did not refer to apps, just websites.*

Base: Parents of 3-4s whose child watches TV (616), goes online (328), plays games (228). Significance testing shows any change between 2017 and 2018.

Figure 96: Concerns about television, online or gaming content, among parents of 5-15s using each media type at home (2009, 2011) or elsewhere (2014, 2017, 2018)



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

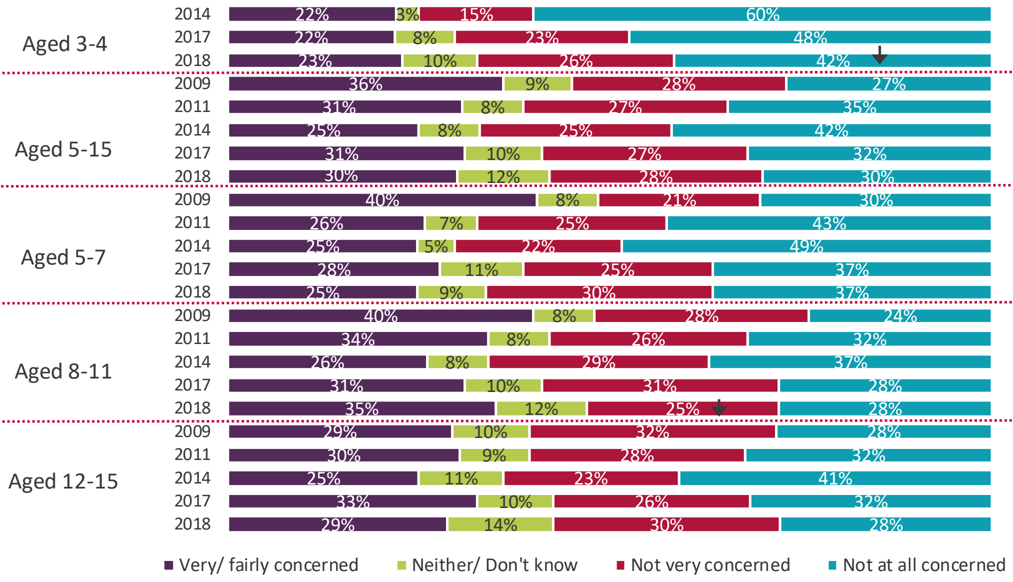
Most parents continue to say they are not concerned about television content

Figure 97 shows that overall concern (very/fairly) about television content is higher among parents of 8-11s (35%), and 12-15s (29%) than among parents of 3-4s (23%). Parents of children in each age group continue to be more likely to be unconcerned than concerned about the television content their child watches.

As mentioned above, while there has been no change in the proportion of parents of 3-4s who say they are concerned about the television content their child watches, they are less likely to say they are 'not at all' concerned (42% vs. 48%).

Parents of boys aged 5-7 are more likely than parents of girls to be concerned (29% vs. 20%).

Figure 97: Parental concerns about television content watched at home (2009, 2011) or elsewhere (2014, 2017, 2018), 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 (616 aged 3-4, 1411 aged 5-15, 441 aged 5-7, 492 aged 8-11, 478 aged 12-15). Significance testing shows any change between 2017 and 2018.

Insight from Cross-Platform Media Tracker: parental awareness of and attitude towards the watershed

Awareness levels of the watershed remain high. At almost nine in ten (88%), the level of awareness of the 9pm watershed on TV among all parents is the same as that among all adults (89%) and has not changed since 2015.

However, there are signs of erosion of awareness of the watershed among younger adults. This is likely to be driven by their higher levels of non-linear viewing activity.

Interestingly, although awareness of the watershed is lowest among younger adults – those aged 16 to 34 (at 84% compared to 89% for all adults) – this age group is more likely than average (23% vs. 18%) to think that the watershed should be earlier than 9pm. Perhaps unsurprisingly, the group most likely to think this is parents with children aged 3-4 (28%).

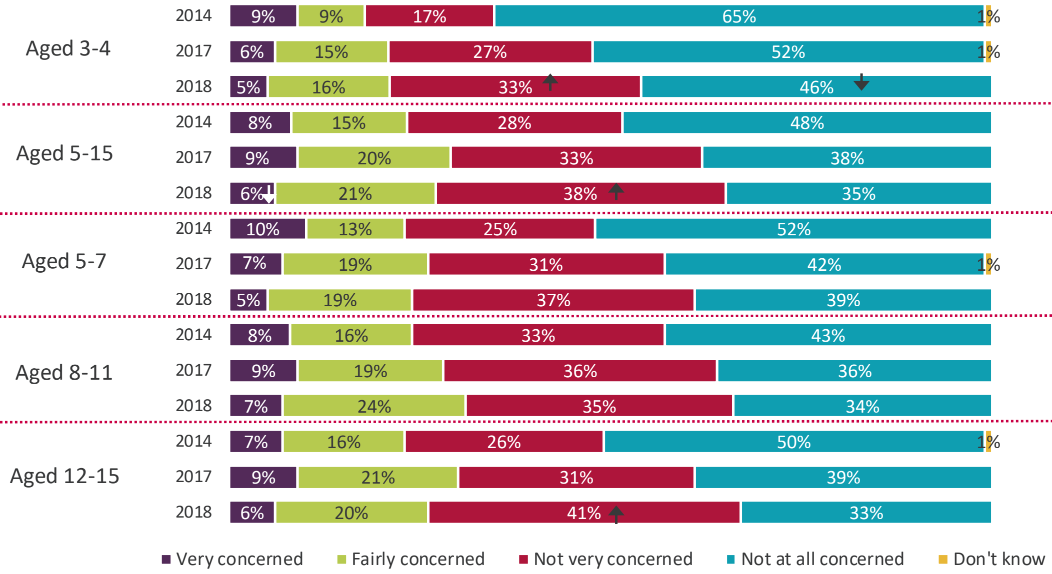
A minority of parents say they are concerned about what their child has seen on pre-watershed television

Parents of 3-4s 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 98.

One in five parents of 3-4s say they are concerned overall (very/ fairly) about the types of things their child has seen on pre-watershed TV, with eight in ten saying they are either not very, or not at all concerned. Parents of 5-15s (27%) are more likely than parents of 3-4s (21%) to say they are concerned. Among parents of 5-15s, parents of 8-11s (31%) are more likely than parents of 5-7s (24%) to say they are concerned.

Parents of boys aged 5-7 are more likely than parents of girls to say they are concerned (28% vs. 20%) about the types of things their child has seen on pre-watershed TV.

Figure 98: Parental concerns about pre-watershed television content: 2014, 2017, 2018



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 (616 aged 3-4, 1411 aged 5-15, 441 aged 5-7, 492 aged 8-11, 478 aged 12-15). Significance testing shows any change between 2017 and 2018.

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[84]. These responses were then categorised by the interviewer into a list of possible concerns. The results are shown in Figure 99, 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 a higher proportion of parents of 5-15s (27%) have concerns about what their child has seen on pre-watershed TV in the past 12 months.

Parents of 5-15s are more likely than parents of 3-4s to express 12 of the 15 concerns. Among parents of 5-15s, there tends to be little variation in concerns by the age of the child; where differences exist (i.e. for offensive language or unsuitable content aired pre-watershed) parents of 8-11s are more likely to be concerned compared to parents of 5-7s.

There are five types of concern that 10% or more parents of 5-15s are likely to be concerned about: offensive language (16%), content unsuitable for younger people (13%) sex or sexually-explicit content (13%), violence (in general) (12%), and unsuitable content aired pre-watershed (10%). Among parents of 3-4s whose child watches television, offensive language (10%) and content unsuitable for younger people (10%), are the only concerns mentioned by at least one in ten parents in 2018.

There has only been one change since 2017: parents of 3-4s are now more likely to say they are concerned about the glamorisation of certain lifestyles; e.g. celebrity lifestyles or drug-taking (4% vs. 2%).

As mentioned above, parents of boys aged 5-7 are more likely than parents of girls to say they are concerned, and this is attributable to their being more likely to have three specific concerns: sex/ sexually explicit content (14% vs. 8%), unsuitable content aired pre-watershed (11% vs. 4%) and nakedness/ naked bodies (9% vs. 3%).

Compared to the average for parents of 5-15s, those in AB households are more likely to be concerned about nakedness/ naked bodies (12% vs. 8%) while those in DE households are less likely to be concerned about content unsuitable for younger people (9% vs.13%) and about the glamorisation of certain lifestyles (4% vs.7%).

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[84] For more information about children's concerns about the on-demand and online content they engage with, please refer to Section A9 of this report.

Figure 99: Types of concern about pre-watershed television content, by age: 2018

	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
ANY CONCERNS	21%	27%	24%	31%	25%
Offensive language	10%	16%	14%	19%	15%
Unsuitable content for younger people/ children	10%	13%	13%	14%	13%
Sex/ sexually explicit content	7%	13%	11%	14%	14%
Violence (in general)	9%	12%	10%	13%	13%
Unsuitable content aired pre-watershed	6%	10%	7%	12%	10%
Sexually provocative/ sexualised performances (i.e. could be through acting or dancing in music videos etc.)	4%	9%	6%	11%	10%
Nakedness/ naked bodies/ naked body parts	5%	8%	6%	8%	10%
Portrayal of anti-social behaviour	5%	7%	6%	6%	8%
Glamorisation of certain lifestyles	4% ↑	7%	5%	7%	6%
Makes me feel embarrassed/ don't feel comfortable watching with others/ adults	3%	5%	4%	6%	6%
Makes me feel embarrassed/ don't feel comfortable watching with my child/ children	3%	5%	4%	5%	6%
Lack of respect towards adults	2%	4%	3%	4%	5%
Discriminatory treatment/ portrayal of people	2%	4%	4%	3%	6%
Negative portrayal of or objectification of women	2%	3%	3%	4%	3%
Invasion of privacy/ not respecting people's privacy	1%	3%	2%	2%	4%

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 (616 aged 3-4, 1411 aged 5-15, 441 aged 5-7, 492 aged 8-11, 478 aged 12-15). Significance testing shows any change between 2017 and 2018.

A quarter of parents of 3-4s and three in ten parents of 5-15s say they are concerned about the time their child spends watching television

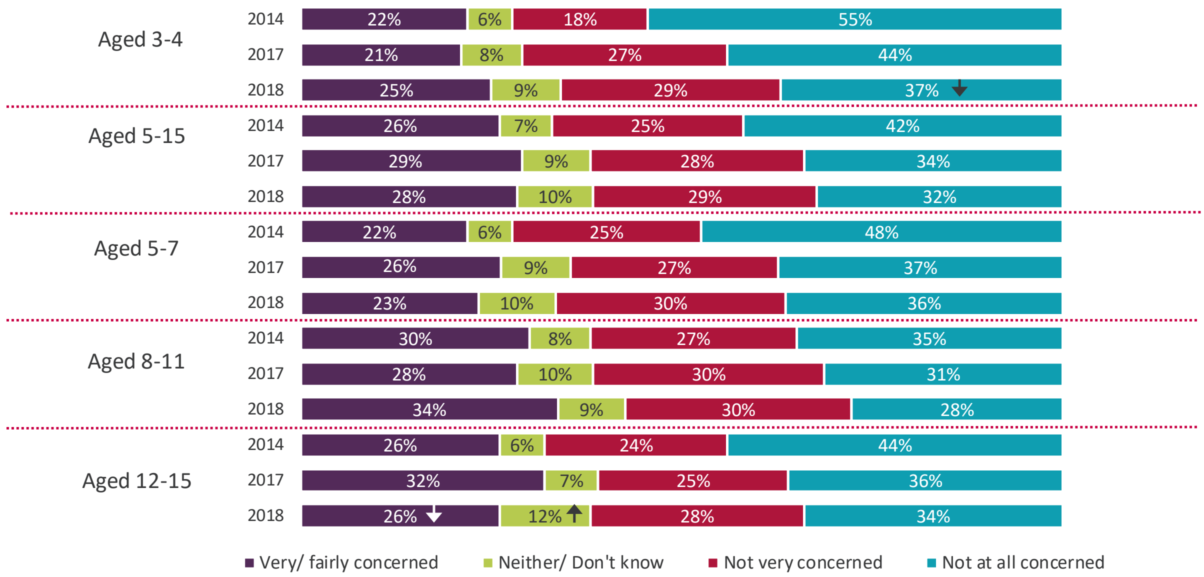
As summarised earlier, parents of 3-4 and 5-15s whose child watches TV at home or elsewhere were asked to think about the extent to which they are concerned about the time their child spends watching television (on any device). Parents of 8-11s (34%) are more likely than parents of 3-4s (25%), 5-7s (23%) and 12-15s (26%) to say they are concerned.

For each age group of children, parents are more likely to say they are 'not very' or 'not at all' concerned, rather than being 'very' or 'fairly' concerned, about how much time their child spends watching television.

Compared to 2017, parents of 12-15s are less likely to say they are concerned about the time their child spends watching television (26% vs.32%)[85]. Parents of 3-4s are less likely to say they are 'not at all' concerned (37% vs. 44%).

Parents of 3-4s in ABC1 households are more likely to be concerned compared to those in C2DE households (31% vs.19%).

Figure 100: Parental concerns about the time their child spends watching television at home or elsewhere (2014, 2017, 2018)



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[85] This decrease for parents of 12-15s between 2017 and 2018 follows a corresponding increase (not shown in the Figure) between 2016 (25%) and 2017 (32%).As such, the data in 2018 are returning to levels previously seen in 2016 for parents of 12-15s.

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).

Base: Parents of children whose child watches TV (616 aged 3-4, 1411 aged 5-15, 441 aged 5-7, 492 aged 8-11, 478 aged 12-15). Significance testing shows any change between 2017 and 2018.

Parental attitudes towards the internet

Fewer parents of 5-15s feel that the benefits of the internet outweigh the risks than in 2017

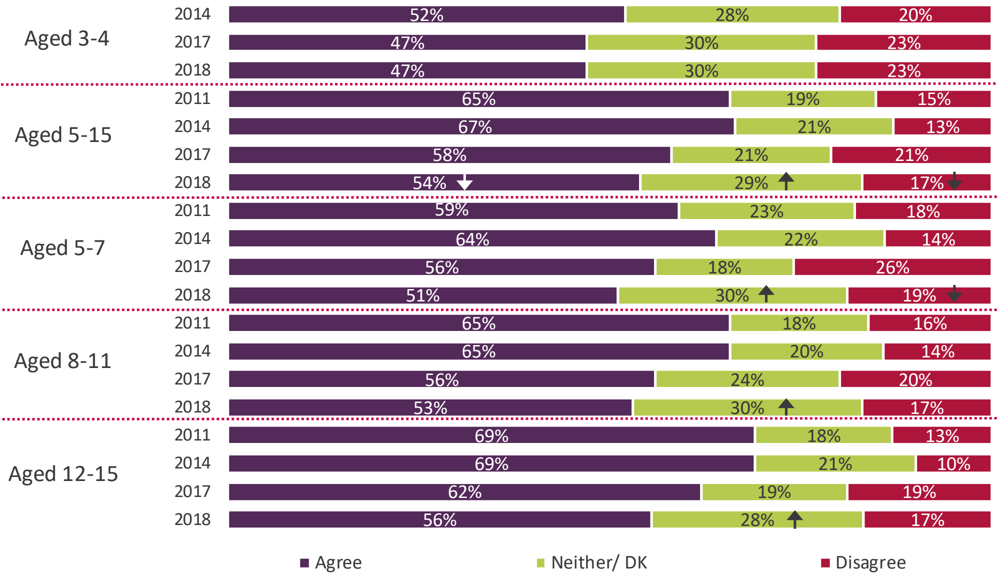
Close to half of parents of 3-4s who go online (47%) agree that the benefits of the internet outweigh the risks, while a sizeable minority, 23%, disagree. More than half of parents of 5-15s who go online also agree with this statement (54%), while 17% disagree.

Parents of children in each group are more likely to agree than to disagree that the benefits of the internet outweigh the risks.

Parents of 12-15s (56%) are more likely than parents of 3-4s (47%) to agree.

Compared to 2017, parents of 5-15s are less likely to agree (54% vs. 58%) although this decrease is not attributable to any particular age group. In recent years, across parents of children in each age group, there has been a clear decrease in the proportion who agree that the benefits of the internet outweigh the risks.

Figure 101: Parental agreement with "The benefits of the internet for my child outweigh any risks", among those whose child goes online at home (2011) at home or elsewhere (2014, 2017, 2018), 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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

Eight in ten parents of 5-15s feel they know enough to help their child to stay safe online

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 stay safe online[86]”. The responses are shown in Figure 102, as given by parents of children in each age group who go online at home.

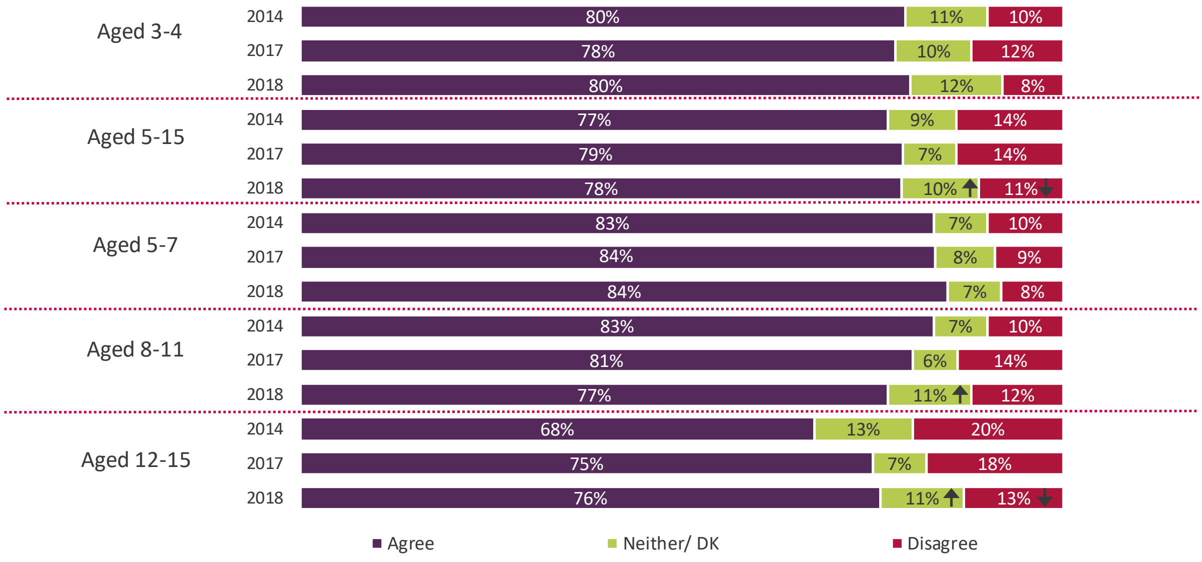
In 2018, more than three-quarters of parents of 5-15s who go online (78%) agree with this statement. A comparable proportion of parents of 3-4s who go online also agree (80%).

Among parents of 5-15s, parents of 5-7s (84%) are more likely to agree compared to parents of 8-11s (77%) and parents of 12-15s (76%).

Eleven per cent of parents of 5-15s disagree (either strongly or slightly) that they feel they know enough to help their child to stay safe online, as do a similar proportion of parents of 3-4s (8%). While agreement is unchanged since last year, parents of 5-15s are less likely to disagree (11% vs. 14%), attributable to parents of 12-15s (13% vs. 18%).

Parents of boys aged 3-4 and 12-15 are more likely than parents of girls to feel they know enough to help their child to stay safe online (55% vs. 42% for 3-4s and 44% vs. 32% for 12-15s).

Figure 102: Parental agreement with “I feel I know enough to help my child to stay safe online*” among those whose child goes online at home or elsewhere (2014, 2017, 2018), 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)

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[86] Before 2018, parents were asked whether they felt they knew enough to help their child manage online risks.

**In 2017, this question referred to “I feel I know enough to help my child manage online risks”*

Base: Parents of children who go online (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

Summary of parental concerns about the internet

At least three in ten parents of 5-15s who go online are concerned about aspects of their child’s internet use, with substantial increases since 2011

Figure 103 below summarises 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, and which are discussed in more detail in this section.

In summary, between 29% and 50% of parents of 5-15s whose child goes online are concerned about each of these aspects of their child’s internet use.

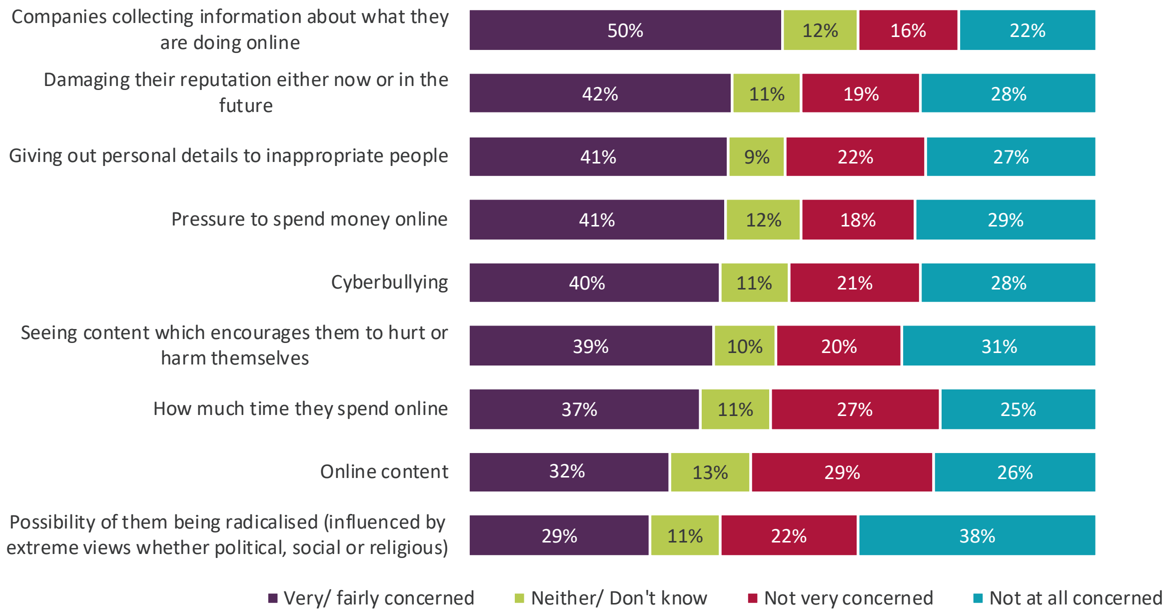
In 2018, half of the parents of 5-15s are concerned about companies collecting information about what their child is doing online. As set out in Figure 103, the following aspects are of concern for around four in ten parents of 5-15s who go online: their child damaging their reputation, their child giving out details to inappropriate people, the pressure on their child to spend money online, cyberbullying, and their child seeing content online that encourages them to harm themselves. Around a third, or more, are concerned about how much time their child spends online or the content of the websites their child visits. Three in ten parents are concerned about the possibility of their child being radicalised online.

While not shown in Figure 103, parents of 5-15s are more likely than in 2017 to be concerned about three of these nine potential concerns: their child damaging their reputation (42% vs. 37%), the pressure on their child to spend money online (41% vs. 35%) and the possibility of their child being radicalised online (29% vs. 25%).

Compared to 2017, parents of 3-4s are more likely to have concerns about seven of the nine concerns asked about: companies collecting information about what the child is doing online (32% vs. 25%), their child damaging their reputation (27% vs. 18%), giving out details to inappropriate people (25% vs. 18%), pressure to spend money online (31% vs. 21%), cyberbullying (23% vs. 15%), seeing content which encourages them to harm themselves (29% vs. 20%) and the possibility of their child being radicalised online (22% vs. 16%).

Where it is possible to make a comparison with 2011 (for parents of 5-15s) and 2014 (for parents of 3-4s) the trend among these parents is that concerns about their child’s internet use have increased.

Figure 103: Parental concerns about aspects of their child's internet use, 5-15s: 2018



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 (1304).

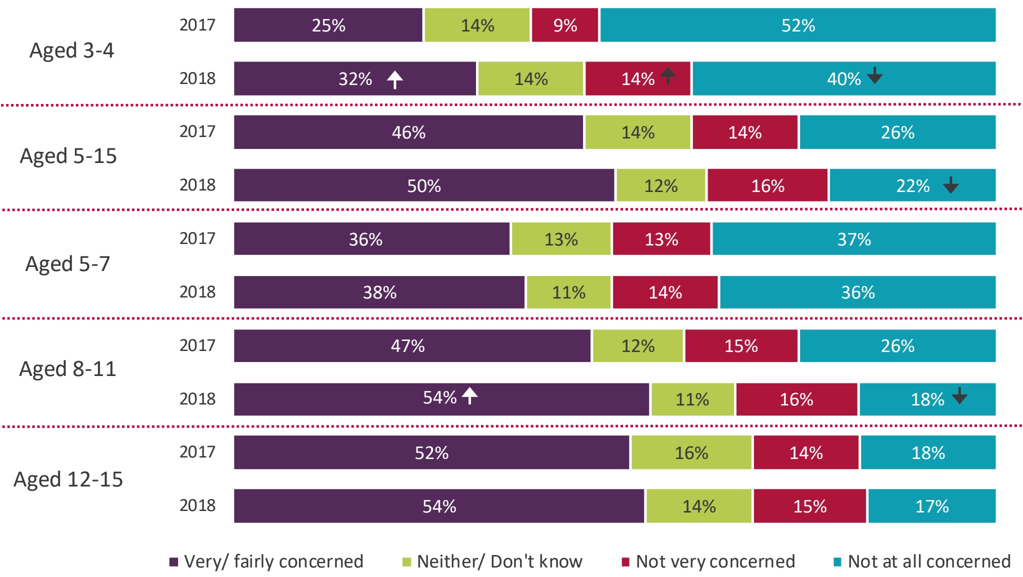
A third of parents of 3-4s and half of parents of 5-15s who go online are concerned about companies collecting information about what their child is doing online

As shown in Figure 104, half 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 (54%) and 12-15s (54%) than among parents of 3-4s (32%) and parents of 5-7s (38%).

Compared to 2017, parents of 3-4s (32% vs. 25%) and parents of 8-11s (54% vs. 47%) are more likely to say they are concerned about this aspect of their child's internet use.

In 2018, parents of girls aged 3-4 are more likely than parents of boys to say they are concerned (38% vs. 26%). Parents of 3-4s who go online in ABC1 households are more likely to be concerned than parents in C2DE households (38% vs. 25%).

Figure 104: Parents' concerns about companies collecting information about what their child is doing online, by age: 2017, 2018



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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

Parents of 3-4s and 5-15s who go online are more concerned than in 2017 about their child damaging their reputation as a result of their online activities

As shown in Figure 105, more than four in ten (42%) 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.

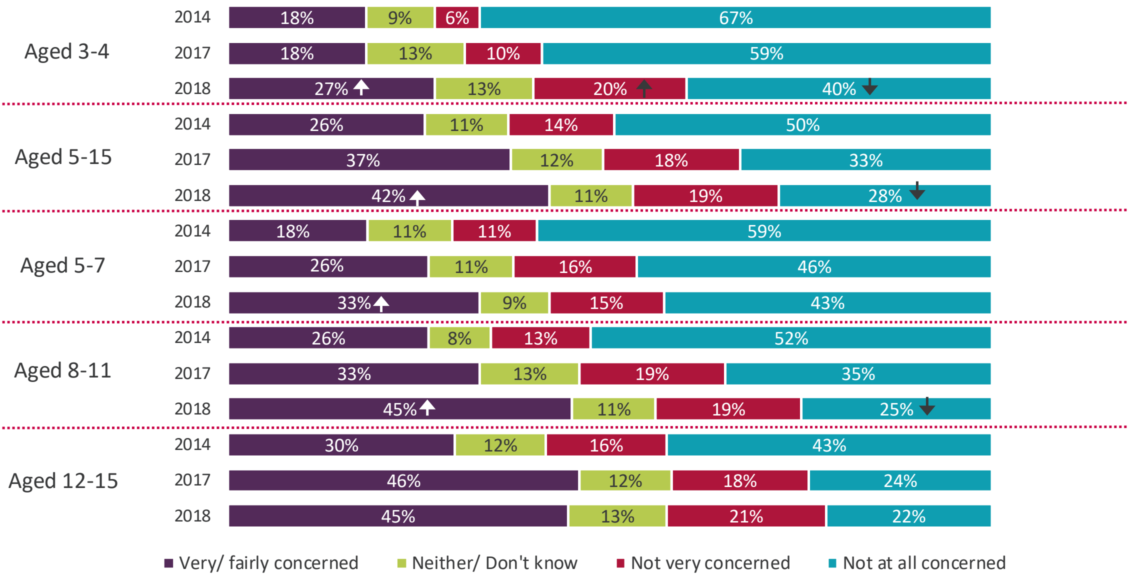
Concern is lower among parents of 3-4s (27%) and 5-7s (33%) than among parents of 8-11s or 12-15s (both 45%).

Parents of 5-15s whose child goes online are more likely than in 2017 to say they are concerned about their child damaging their reputation (42% vs 37%) and this increase is evident for parents of 5-7s (33% vs 26%) and 8-11s (45% vs 33%). Parents of 3-4s are also more likely to be concerned about this (27% vs. 18%).

Parents of girls aged 12-15 whose child goes online are more likely than parents of boys to say they are concerned about their child damaging their reputation as a result of what they do online (49% vs. 40%).

Parents of 3-4s whose child goes online in ABC1 households are twice as likely as those in C2DE households to say they are concerned about this (36% vs. 18%).

Figure 105: Parents’ concerns about their child damaging their reputation, by age: 2014,2017,2018



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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

Compared to last year, parents of 3-4s are more likely to be concerned that their child may be giving out personal details to inappropriate people

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 106.

A quarter of parents of 3-4s (25%) and four in ten parents of children aged 5-15 (41%) are concerned that their child may be giving out personal details to inappropriate people.

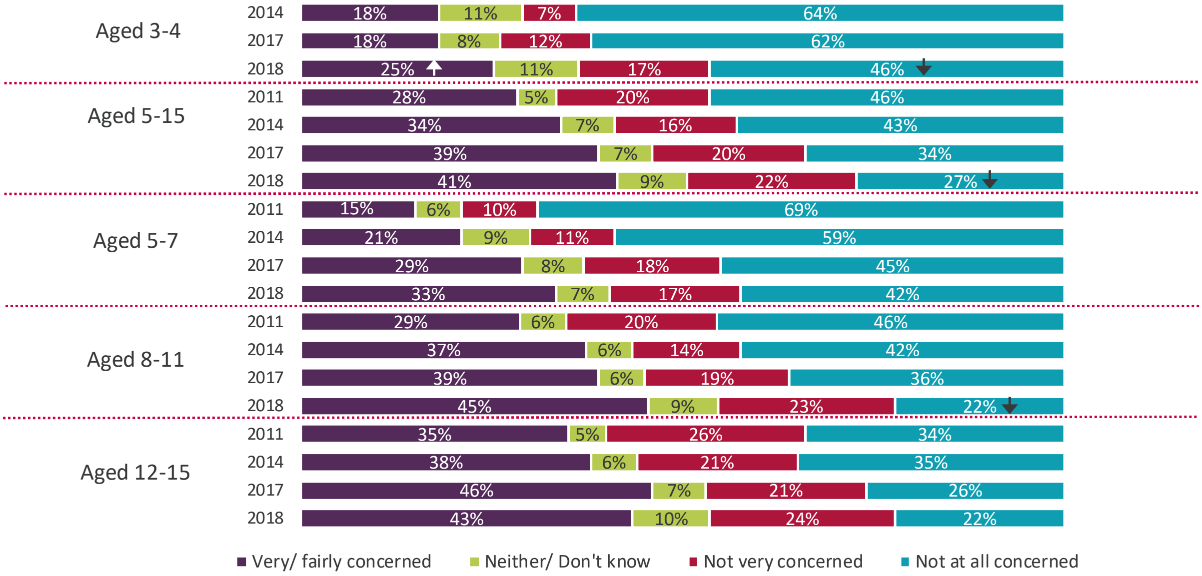
Parents of 8-11s (45%) and 12-15s (43%) are more likely than parents of 3-4s (25%) or 5-7s (33%) to be concerned.

Parents of 3-4s whose child goes online are more concerned than in 2017 about their child giving out personal details online to inappropriate people (25% vs. 18%).

While parents of 5-15s are no more likely to say they are concerned, they are less likely to say they are 'not at all' concerned compared to 2017 (27% vs. 34%) - this decrease is attributable to parents of 8-11s (22% vs. 36%). Concern among parents of 5-15s about this aspect of their child's internet use has, however, increased substantially since 2011 (up from 28% to 41%).

Parents of boys aged 12-15 are more likely than parents of girls to say they are 'not at all' concerned about this aspect of their child's internet use (27% vs. 17%). Parents of 3-4s in ABC1 households are more likely than those in C2DE households to say they are concerned (31% vs. 19%).

Figure 106: Parental concerns about their child giving out personal details online to inappropriate people, among those whose child goes online at home (2011), or elsewhere (2014, 2017, 2018), 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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

Compared to 2017, parents of 3-4s and 5-15s are now more likely to say they 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 107.

Four in ten parents of 5-15s (41%) are concerned about the pressure on their child to spend money online.

Concern is lower among parents of 3-4s (31%) and 5-7s (33%) than among parents of 8-11s (46%) and 12-15s (42%).

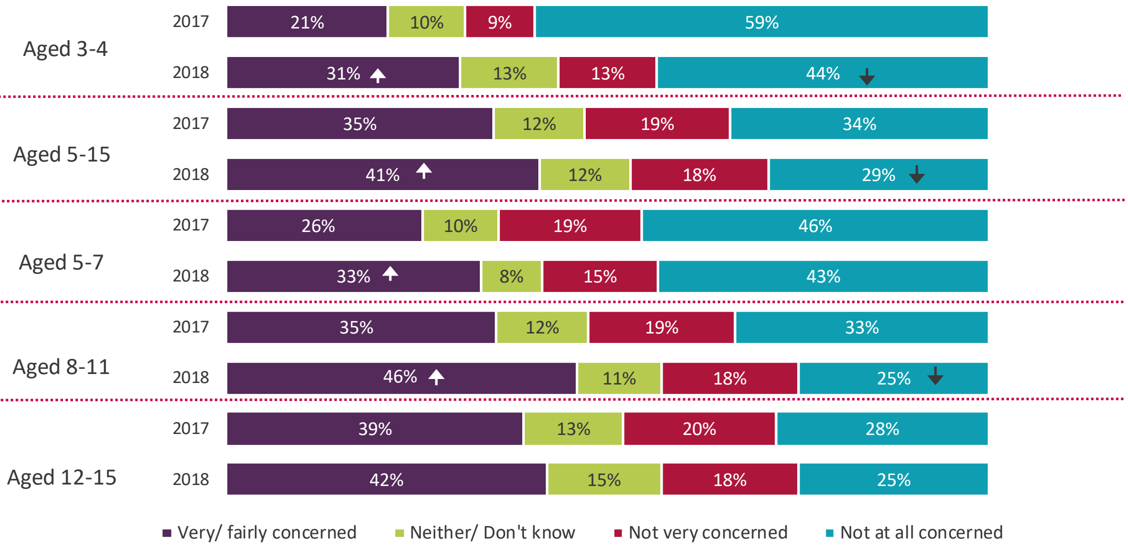
Compared to 2017, parents of 3-4s (31% vs. 21%) and 5-15s (41% vs. 35%) are now more likely to say they are concerned about the pressure on their child to spend money online[87]. The increase among parents of 5-15s is evident for parents of 5-7s (33% vs. 26%) and parents of 8-11s (46% vs. 35%).

In 2018, parents of boys aged 5-7 are more likely than parents of girls to be concerned about their child being under pressure to spend money online (39% vs. 28%).

Parents of 3-4s who go online in ABC1 households are more likely than those in C2DE households to be concerned about this aspect of their child's internet use (38% vs. 23%), while those in C2DE households are more likely to say they are 'not at all' concerned (51% vs. 37%).

Compared to the average for parents of 5-15s (41%), those in C1 households are more likely to be concerned (49%).

Figure 107: Parents' concerns about their child being under pressure to spend money online, by age: 2017, 2018



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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

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[87] As discussed earlier at Figure 81, compared to 2017, children aged 12-15 who opted to answer the question are more likely to say they have accidentally spent money online (17% vs. 9%)

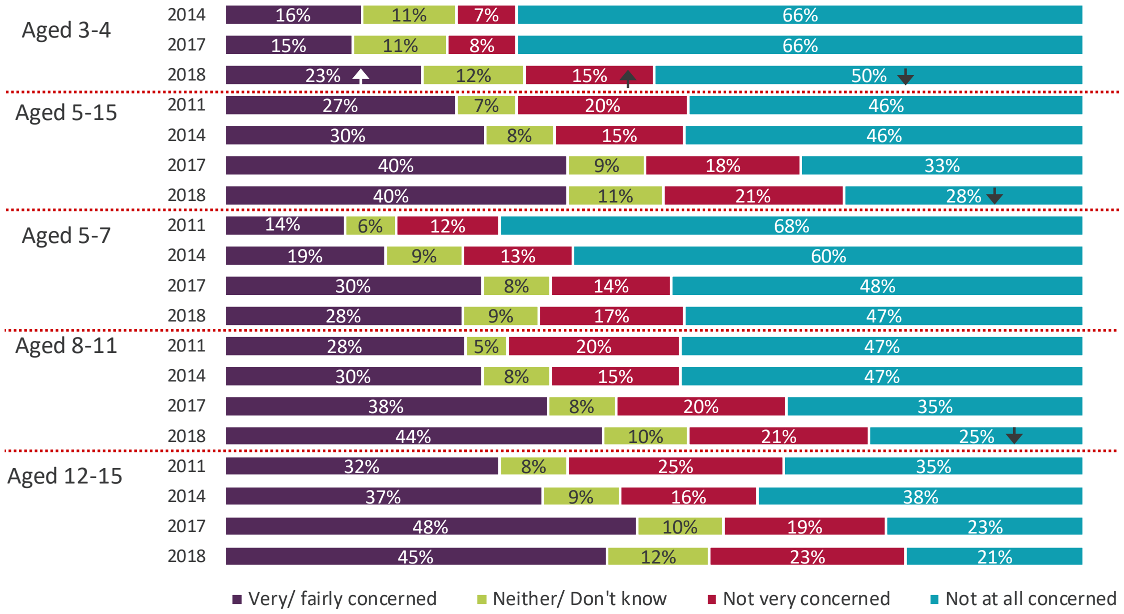
Parents of 3-4s whose child goes online are becoming more concerned about online bullying

Four in ten parents of 5-15s, and nearly a quarter of parents of 3-4s (23%), are concerned about their child being bullied online. Parents of 8-11s (44%) and 12-15s (45%) are more concerned than parents of 3-4s (23%) or 5-7s (28%).

Parents of 3-4s whose child goes online are more concerned about online bullying than in 2017 (23% vs. 15%). While parents of 5-15s are no more likely to say they are concerned, they are less likely than in 2017 to say they are ‘not at all’ concerned (28% vs. 33%); this decrease is attributable to parents of 8-11s (25% vs. 35%). Since 2014, however, parents of 5-15s are more likely to be concerned about online bullying (up from 27%).

Parents of boys aged 12-15 are more likely than parents of girls to say they are ‘not at all’ concerned about online bullying (25% vs. 17%). Parents of 3-4s in C2DE households are more likely than those in ABC1 households to say they are ‘not at all’ concerned (58% vs. 43%).

Figure 108: Parents' concerns about online bullying among those whose child goes online at home (2011) or elsewhere (2014, 2017, 2018), 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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

Parents of 3-4s are becoming more concerned about their child seeing content which encourages them to harm themselves

Three in ten parents of 3-4s (29%) and four in ten parents of 5-15s who go online (39%) are concerned about their child seeing content which encourages them to hurt or harm themselves, as shown in Figure 109.

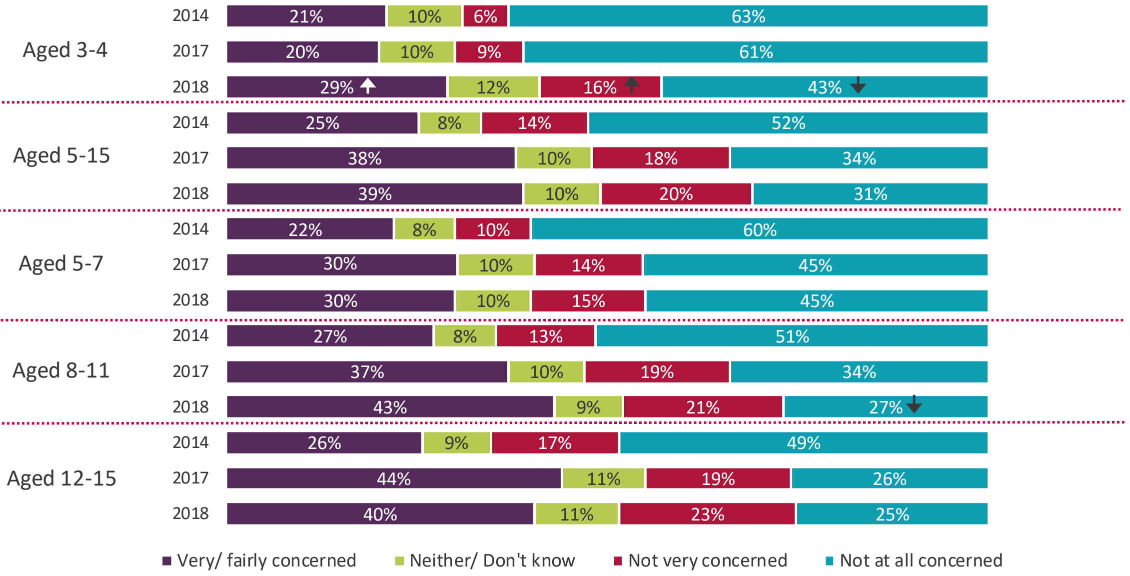
Parents of 3-4s (29%) and 5-7s (39%) are less likely to be concerned about this aspect of their child's internet use compared to parents of 8-11s (43%) and 12-15s (40%).

Compared to 2017, parents of 3-4s whose child goes online are more concerned about this issue (29% vs. 20%). While no more likely to be concerned, in 2018 parents of 8-11s are less likely to say they are 'not at all' concerned about their child seeing content which encourages them to harm themselves (27% vs. 34%). Since 2014, however, parents of 5-15s are more likely to be concerned (up from 25%).

In 2018, parents of boys aged 5-7 who go online are more likely than parents of girls to say they are concerned about their child seeing this type of content online (36% vs. 24%); parents of girls aged 12-15 are also more likely to say this (45% vs. 35%).

Among parents of 3-4s whose child goes online, those in ABC1 households are more likely than parents in C2DE households to be concerned about their child seeing content which encourages their child to harm themselves (35% vs. 22%).

Figure 109: Parents' concerns about their child seeing content which encourages them to harm themselves, by age: 2014, 2017, 2018



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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

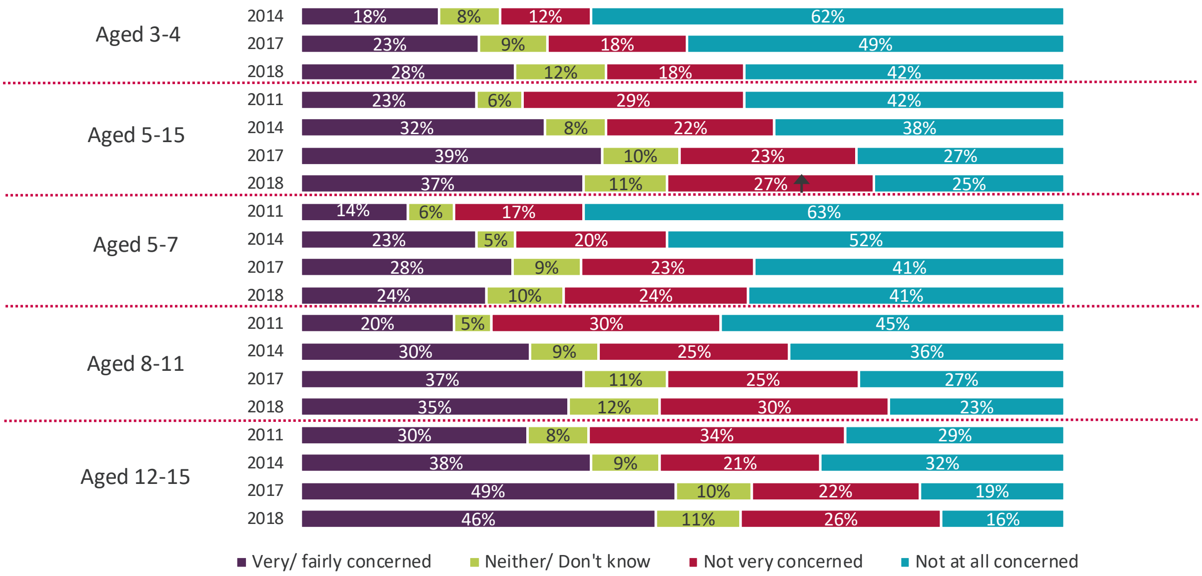
Since 2011, concerns about how much time their child spends online have increased by 14 percentage points for parents of 5-15s

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. Close to three in ten parents of 3-4s (28%) are concerned about how much time their child spends online, with concern higher among parents of 5-15s (37%). Among parents of 5-15s concern increases with the age of the child: from 24% of parents of 5-7s who go online to 46% of parents of 12-15s.

Concern about how much time their child spends online is unchanged since 2017 for parents of 3-4s, 5-7s, 8-11s and 12-15s. But concerns have increased by 10 percentage points since 2014 for parents of 3-4s and by 14 percentage points since 2011 for parents of 5-15s.

In 2018, parents of boys aged 5-7 are more likely than parents of girls (31% vs. 17%) to say they are concerned about the time their child spends online. Among parents of 5-15s, those in AB households (44%) are more likely than average (37%) to be concerned, while those in DE households are more likely than average to say they are 'not at all' concerned (59% vs. 52%). Two-thirds (66%) of parents of 3-4s who go online in C2DE households say they are 'not at all' concerned, more than in ABC1 households (55%).

Figure 110: Parental concerns about how much time their child spends online, among those whose child goes online at home (2011) or elsewhere (2014, 2017, 2018), 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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

One-third of parents of 5-15s are concerned about the online content to which their child is exposed

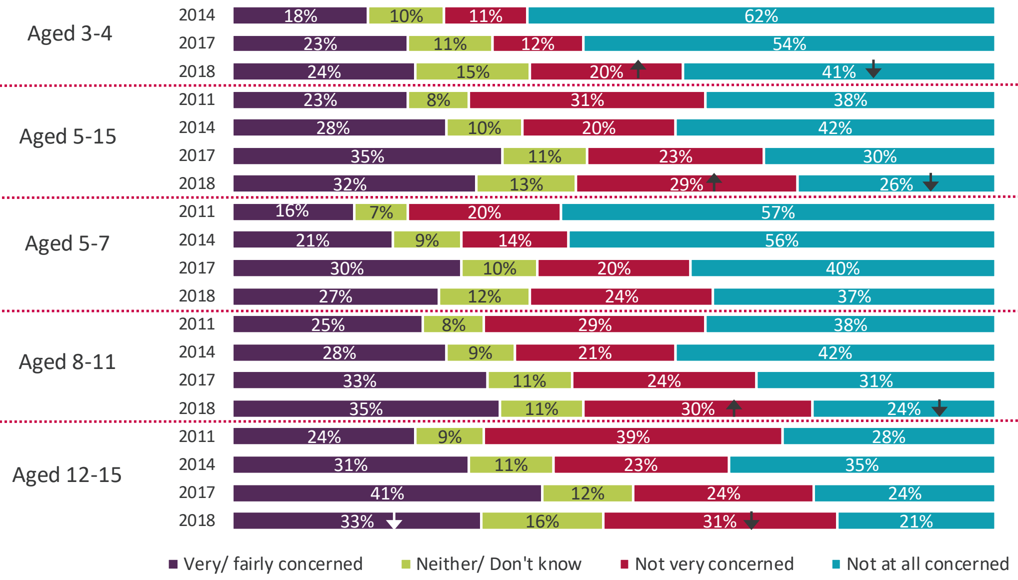
Parents of children aged 3-4 and 5-15 who go online were asked about the extent of their concerns relating to online content, as shown in Figure 111.

While a quarter of parents of 3-4s who go online (24%) are concerned about the content of the websites or apps their child visits, this rises to a third (32%) for parents of 5-15s.

Compared to 2017, parents of 12-15s are less likely to say they are concerned about online content (33% vs. 41%), with this response unchanged for any other age group of children. Parents of 3-4s and 5-15s are, however, less likely to say they are 'not at all' concerned (41% vs. 54% for 3-4 and 26% vs. 30% for 5-15s) and this decrease among parents of 5-15s is only evident for parents of 8-11s (24% vs. 31%). Parents of 5-15s who go online are, however, more likely than in 2011 to be concerned about online content (32% vs. 23%).

Parents of 3-4s in ABC1 households who go online are more likely than those in C2DE households to be concerned about the content of the websites or apps their child visits (29% vs. 18%).

Figure 111: Parental concerns about online content, among those whose child goes online at home (2011) or elsewhere (2014, 2017, 2018), 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).* Since 2015 the question for the internet asked about 'The content on the websites or apps that they visit'. Before this it did not refer to apps, just websites.*

Base: Parents of children who go online (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

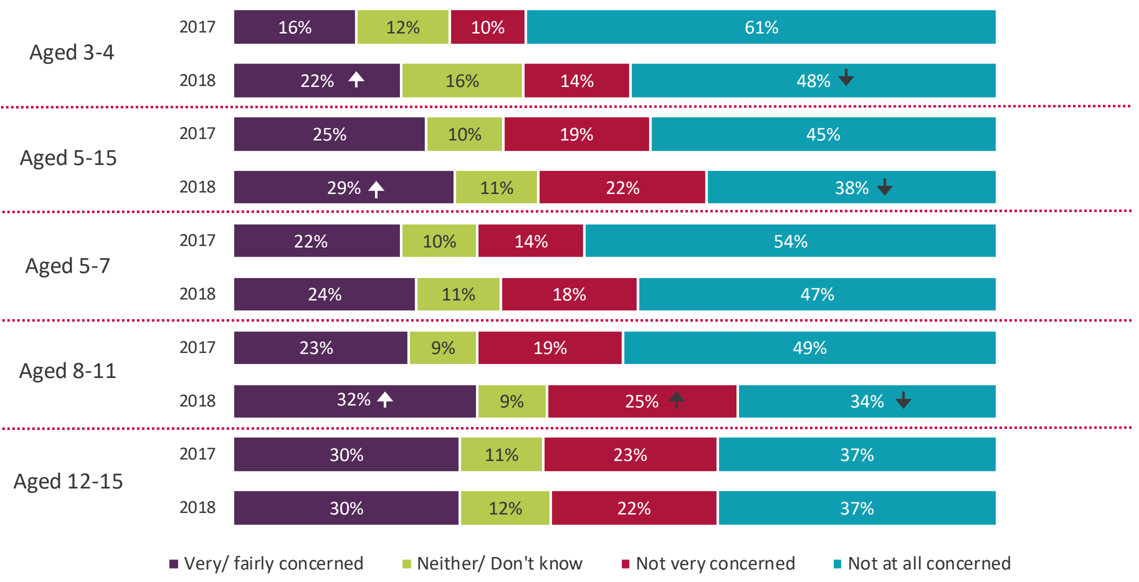
One in five parents of 3-4s and three in ten parents of 5-15s who go online are concerned about the potential for their child to be radicalised online, an increase compared to 2017

As shown in Figure 112, three in ten (29%) 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 lower among parents of 3-4s (22%).

Concern is higher than in 2017 among parents of 3-4s (22% vs. 16%) and parents of 5-15s (29% vs. 25%). The increase for the latter age group is attributable to parents of 8-11s being more concerned in 2018 (32% vs. 23%).

Parents of 3-4s in ABC1 households who go online are more likely than those in C2DE households to be concerned about this aspect of their child's internet use (27% vs. 16%), while those in C2DE households are more likely to say they are 'not at all' concerned (58% vs. 38%).

Figure 112: Parents' concerns about the possibility of their child being radicalised online: 2017, 2018



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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15). Significance testing shows any change between 2017 and 2018.

Parental concerns about mobile phones

Levels of concern about their child's mobile phone use are unchanged since 2017

Parents of 8-15s[88] 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 sizeable 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 2017. Compared to parents of 8-11s, parents of 12-15s are more likely to be concerned (very/ fairly) about how much time their child spends using their phone (41% vs. 32%), but results do not vary by age for each of the other two concerns about their child's mobile phone use.

Results are unchanged since 2017 for each concern among parents of 8-11s or 12-15s. Compared to 2011, however, concerns have increased substantially among parents of 8-11s and 12-15s.

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[88] 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.

Three in ten parents of 8-15s are concerned about whom their child is in contact with on their mobile phone

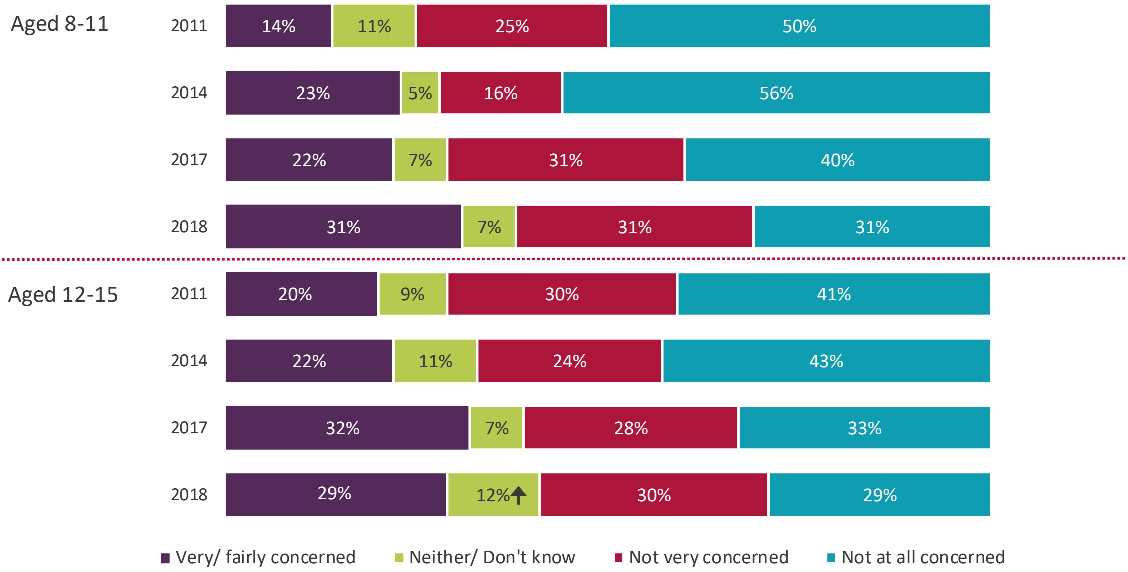
Figure 113 shows responses from parents of 8-11s and 12-15s regarding concerns about whom their child may be in contact with via their mobile phone.

Three in ten parents of 8-11s (31%) and 12-15s (29%) are concerned overall (very/ fairly) about whom their child may be in contact with via their mobile phone. Concern among parents of 8-11s and 12-15s is unchanged compared to 2017.

Parents of 8-11s and 12-15s are, however, more likely than in 2011 to be concerned about this aspect of their child's mobile phone use. This is particularly true for parents of 8-11s, where concern has increased by 17 percentage points.

In 2018, parents of girls aged 12-15 are more likely than parents of boys to say they are concerned about whom their child is in contact with on their mobile phone (35% vs. 22%).

Figure 113: Parents' concerns about whom their child is in contact with via their mobile, by age: 2011, 2014, 2017 and 2018



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 (183 aged 8-11, 415 aged 12-15). Significance testing shows any change between 2017 and 2018.

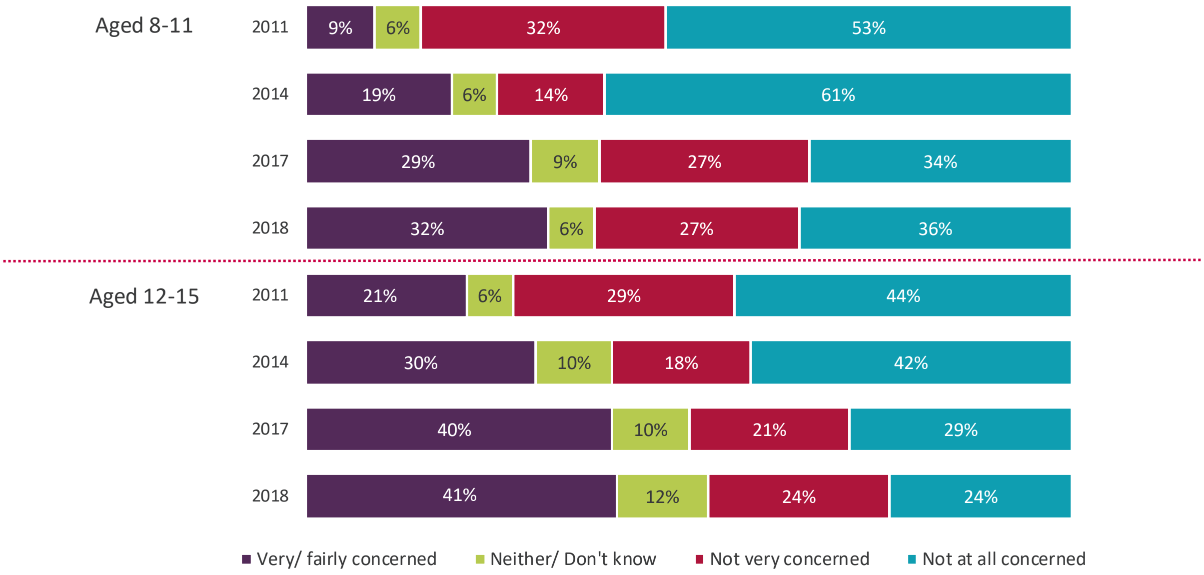
Four in ten parents of 12-15s are concerned about how much time their child spends using their mobile phone

Figure 114 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 more likely to say they are not concerned, than concerned, about this aspect of their child's mobile phone use; concern remains higher among parents of 12-15s (41%) than among parents of 8-11s (32%). Concern among parents of 8-11s and 12-15s is unchanged since 2017. However, compared to 2011 concern among parents of 8-11s has more than trebled, and has doubled among parents of 12-15s.

In 2018, parents of girls aged 12-15 are more likely than parents of boys to say they are concerned about how much time their child spends using the phone (47% vs. 35%).

Figure 114: Parents' concerns about how much time their child spends using the phone, by age: 2011, 2014, 2017 and 2018



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 (183 aged 8-11, 415 aged 12-15).

Compared to 2011, parents of 8-11s are twice as likely to be concerned about their child being bullied via their mobile phone

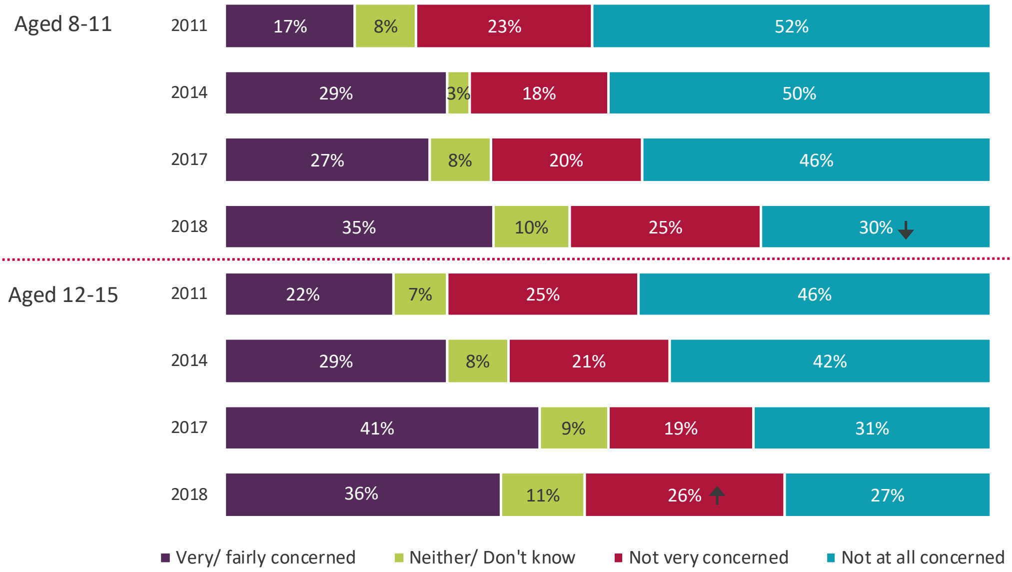
Parents of children aged 5-15 with their own mobile phone were asked about the extent of their concern about their child being bullied via calls/ texts/ emails/ messages to their mobile phone. The responses are shown in Figure 115.

Slightly more than a third of parents of 8-11s (35%) or 12-15s (36%) say they are concerned about their child being bullied through their mobile phone.

Compared to 2017, parents of 8-11s are no more likely to say they are concerned (very/ fairly) about this aspect of their child's mobile phone use. They are, however, less likely to say they are 'not at all' concerned (30% vs. 46%). Since 2011, parents of 8-11s are twice as likely to be concerned about their child being bullied via their mobile phone (35% vs. 17%). Parents of 12-15s are also substantially more likely to be concerned (36% vs. 22%).

In 2018, parents of girls aged 12-15 are more likely than parents of boys to say they are concerned about their child being bullied through the phone (42% vs. 29%).

Figure 115: Parents' concerns about their child being bullied via calls/ texts/ emails/ messages to the child's mobile phone, by age: 2011, 2014, 2017, 2018



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 (183 aged 8-11, 415 aged 12-15). Significance testing shows any change between 2017 and 2018.

Parental concerns about gaming

A sizeable minority of parents express concerns about their child’s gaming

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.

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 2017, parents of 3-4s and 5-15s are now more likely to be concerned about four of these six aspects related to their child’s game playing. As with concerns about their child’s online and mobile phone use, parental concerns about gaming have increased substantially since 2011 or 2014.

Parents of 3-4s and 5-15s are more likely to be concerned about the content of the games their child plays

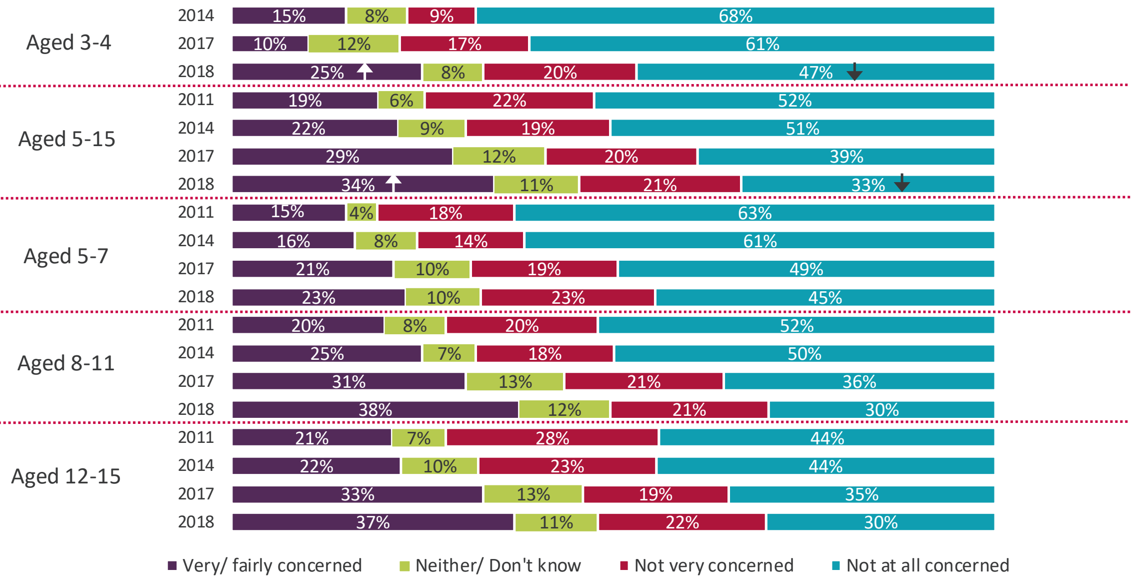
As discussed earlier, parents of children aged 3-4 and aged 5-15 who ever play games through a gaming device were asked how concerned they were about the content of the games that their child played. In addition to showing responses among parents of 3-4s and 5-15s, responses are broken out among parents of 5-7s, 8-11s and 12-15s (Figure 116).

A sizeable minority of parents of children in each age group say they are concerned about the content of the games that their child plays. Parents of 3-4s (25%) and 5-7s (23%) are less likely to say they are concerned about this, compared to parents of 8-11s (38%) and 12-15s (37%).

Since last year parents of 3-4s (25% vs. 10%) and parents of 5-15s (34% vs. 29%) are more likely to be concerned about the content of games; this increase in concern among 5-15s overall is not evident for parents of 5-7s, 8-11s or 12-15s.

Parents of boys aged 5-7 and 8-11 whose child plays games are more likely than parents of girls to say they are concerned (27% vs. 17% for 5-7s and 44% vs. 28% for 8-11s).

Figure 116: Parents' concerns about gaming content among those whose child plays games at home (2011) or at home or elsewhere (2014, 2017, 2018), 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 (228 aged 3-4, 1012 aged 5-15, 277 aged 5-7, 368 aged 8-11, 367 aged 12-15). Significance testing shows any change between 2017 and 2018.

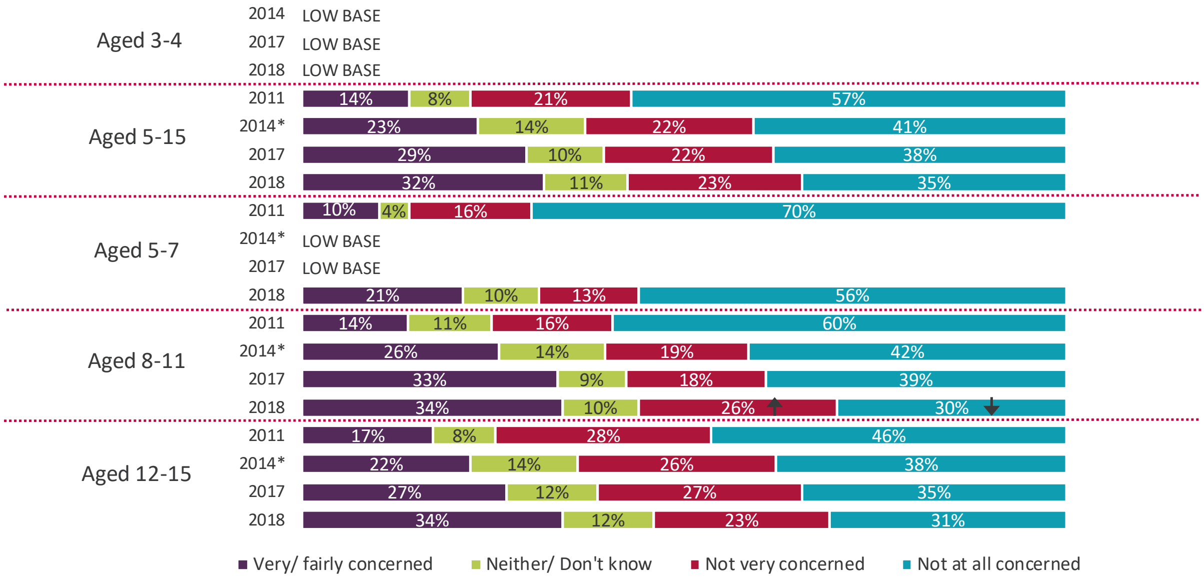
A third of parents of 5-15s say they are concerned about whom their child is playing online games with

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 117, a third of parents of 5-15s (32%) say they are concerned about whom their child is playing online games with through the games player. Parents of 8-11s and 12-15s (both 34%) are more likely than parents of 5-7s (21%) to be concerned about this aspect of their child's gaming[89].

There is only one change compared to 2017: parents of 8-11s are less likely to say they are 'not at all' concerned about whom their child may be playing online games with (30% vs. 39%). Compared to 2011, however, concern has increased considerably for parents of 5-15s (by 18 percentage points), for parents of 8-11s (by 20 percentage points) and for parents of 12-15s (by 17 percentage points).

Figure 117: Parents' concerns about whom their child is gaming with through the games player, among those whose child plays games online at home (2011) or at home or elsewhere (2014, 2017, 2018), by age



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[89] The base for parents of children aged 3-4 who play games online is too low for these results to be included

*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 online (82 aged 3-4, 695 aged 5-15, 133 aged 5-7, 264 aged 8-11, 298 aged 12-15). Significance testing shows any change between 2017 and 2018.

Parents of 3-4s and 5-15s are more likely than in 2017 to say they are concerned about their child being bullied when gaming

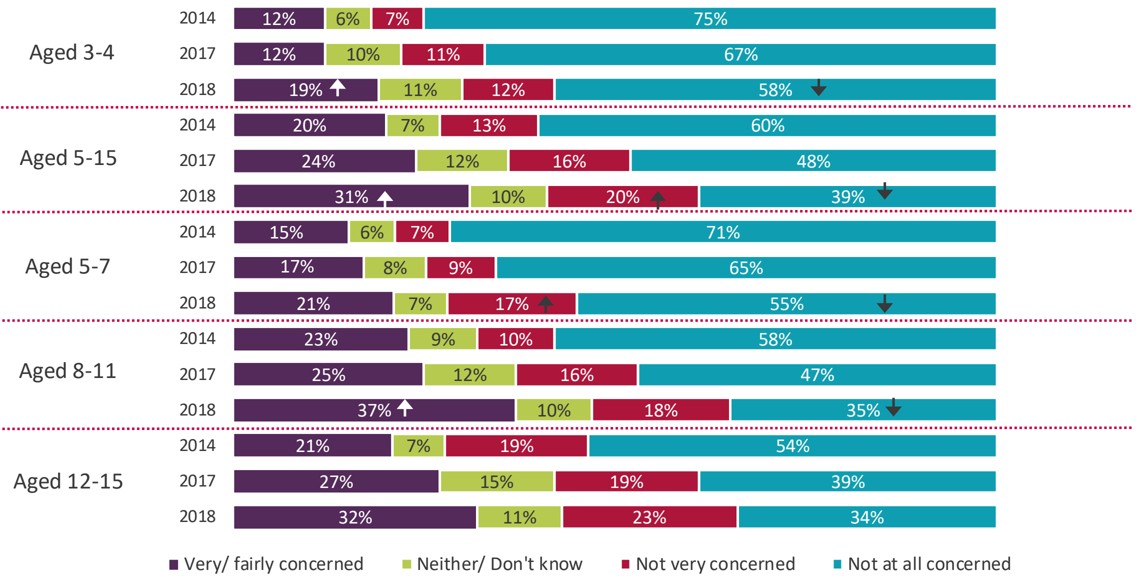
Parents whose child ever plays games through a gaming device, at home or elsewhere, were asked how concerned they were about the possibility of their child being bullied by other players. Responses from parents of children in each age group are shown in Figure 118.

Concerns about their child being bullied by other players are lower among parents of 3-4s (19%) and parents of 5-7s (21%) than among parents of 8-11s (37%) and parents of 12-15s (32%).

Compared to 2017, parents of 3-4s are more likely to say they are concerned about this (19% vs. 12%). Concerns are also more likely among parents of 5-15s (31% vs. 24% in 2017); this increase is attributable to parents of 8-11s (37% vs. 25%). While they are no more likely to say they are concerned (very/fairly), parents of 5-7s are less likely than in 2017 to say they are 'not at all' concerned (35% vs. 47%).

In 2018, parents of girls aged 8-11 and 12-15 are more likely than parents of boys to say they are 'not at all' concerned about the possibility of their child being bullied by other players (41% vs. 30% for 8-11s and 42% vs. 29% for 12-15s).

Figure 118: Parents' concerns about the possibility of the child being bullied by other players: 2014, 2017, 2018



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 (228 aged 3-4, 1012 aged 5-15, 277 aged 5-7, 368 aged 8-11, 367 aged 12-15). Significance testing shows any change between 2017 and 2018.

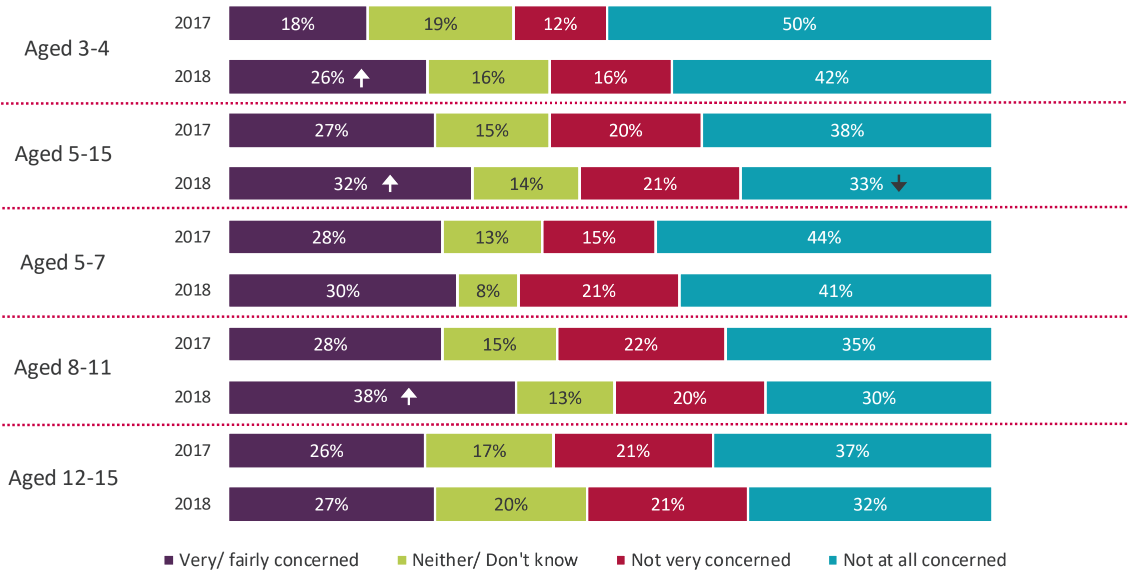
A quarter of parents of 3-4s and a third of parents of 5-15s are concerned about the amount of advertising in games, an increase since 2017

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 119.

A quarter of parents of 3-4s (26%) and a third of parents of 5-15s (32%) whose child plays games say they are concerned about the amount of advertising in games. Parents of children aged 8-11 are more likely to be concerned than parents of 5-7s (30%) or 12-15s (27%).

Parents of 3-4s (26% vs. 18%) and 5-15s (32% vs. 27%) are more likely than in 2017 to have concerns about the amount of advertising in games. This increase in concern among parents of 5-15s is attributable to parents of 8-11s (38% vs 28%).

Figure 119: Parents' concerns about the amount of advertising in games, by age: 2017, 2018



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 (228 aged 3-4, 1012 aged 5-15, 277 aged 5-7, 368 aged 8-11, 367 aged 12-15). Significance testing shows any change between 2017 and 2018.

A quarter of parents of 3-4s and four 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 2017

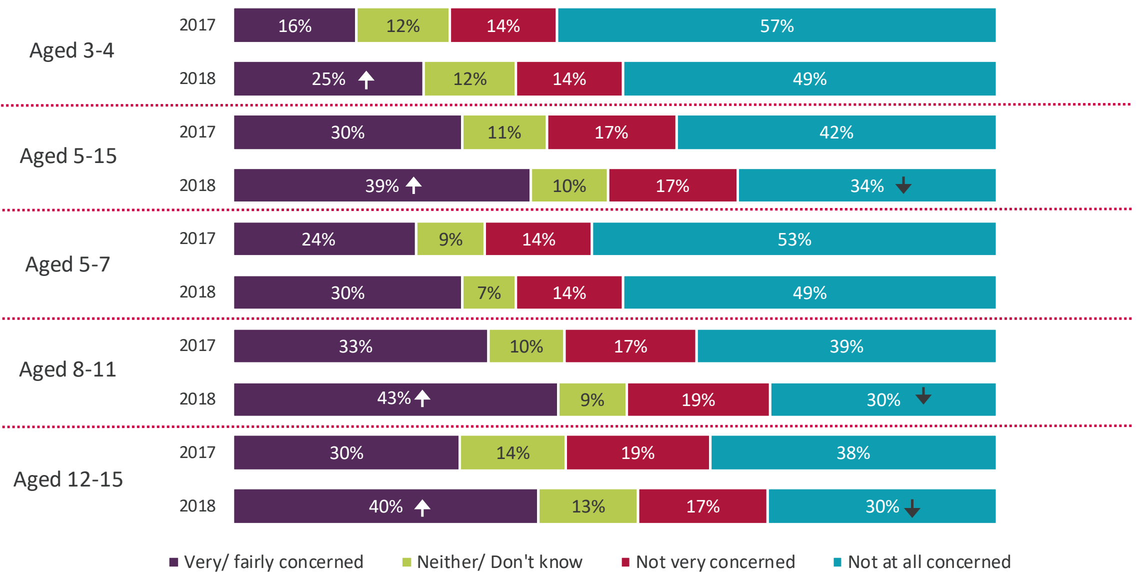
As shown in Figure 120, a quarter of parents of 3-4s and four in ten parents of 5-15s (39%) are concerned about the pressure on their child to make in-game purchases (for things like access to additional points, tokens or levels or for game upgrades or add-ons).

Concern is higher among parents of 8-11s (43%) and 12-15s (40%) than among parents of 3-4s (25%) and 5-7s (30%).

Parents of 5-15s are more likely than in 2017 to have concerns about the pressure on their child to make in-game purchases (39% vs 30%); this increase is evident for parents of 8-11s (43% vs 33%) and 12-15s (40% vs 30%). Parents of 3-4s are also more likely than in 2017 to be concerned (25% vs. 16%).

In 2018, parents of boys aged 8-11 are more likely than parents of girls to say they are concerned about this (48% vs. 36%).

Figure 120: Parents' concerns about the pressure to make in-game purchases, by age: 2017, 2018



QP74D – Please tell me the extent to which you are concerned about these aspects of your child's game 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 (228 aged 3-4, 1012 aged 5-15, 277 aged 5-7, 368 aged 8-11, 367 aged 12-15). Significance testing shows any change between 2017 and 2018.

Compared to 2017, parents of 3-4s are twice as likely to have concerns about how much time their child spends gaming

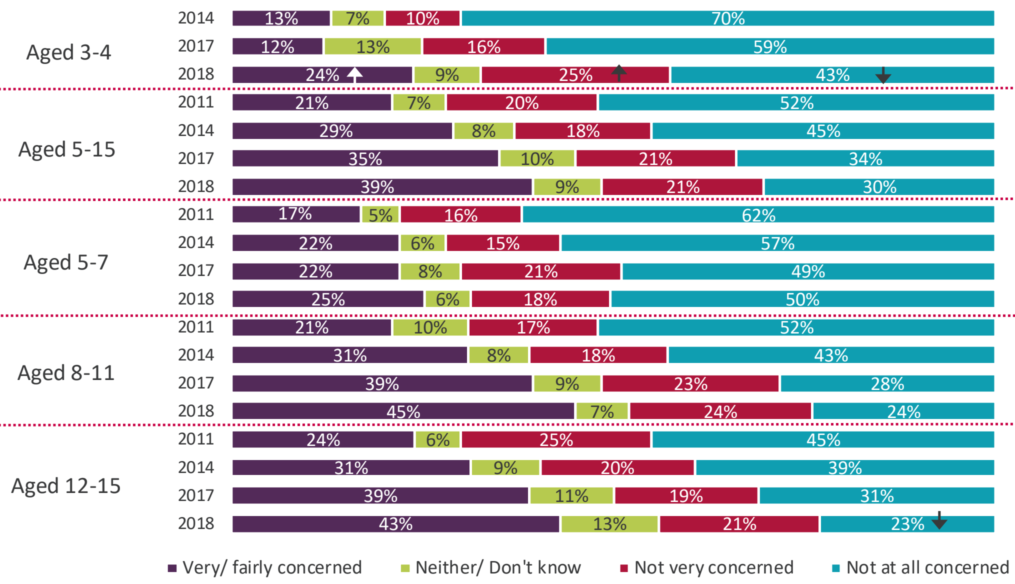
Figure 121 shows responses from parents of 3-4s and 5-15s whose child plays games, regarding concerns about how much time their child spends playing games, as summarised earlier in this section.

A quarter of parents of 3-4s (24%) and four in ten parents of 5-15s (39%) are concerned about the amount of time their child spends playing games. Concern is lower among parents of 3-4s (24%) and 5-7s (25%) than among parents of 8-11s (45%) and 12-15s (43%).

Compared to 2017, parents of 3-4s are twice as likely to have concerns about how much time their child spends gaming (24% vs. 12%). While no more likely to say they are 'very' or 'fairly' concerned, parents of 12-15 are less likely to say they are 'not at all' concerned (23% vs. 31%) in 2017. Since 2011, parents of 5-15s are, however, nearly twice as likely to be concerned (39% vs. 21%).

Parents of boys aged 5-7, 8-11 or 12-15 who play games are more likely than parents of girls to say they are concerned about the time their child spends playing games (30% vs. 19% for 5-7s, 51% vs. 37% for 8-11s, 49% vs. 34% for 12-15s).

Figure 121: Parents' concerns about time spent gaming among those whose child plays games at home (2011) or at home or elsewhere (2014, 2017, 2018), 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 (228 aged 3-4, 1012 aged 5-15, 277 aged 5-7, 368 aged 8-11, 367 aged 12-15). Significance testing shows any change between 2017 and 2018.

A11. 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.

Key findings

- Nearly all parents of 3-4s and 5-15s whose child goes online (97%) use at least one of the four approaches to mediate their child's use of the internet.
- Just over half of parents of 3-4s and 5-15s who have home broadband and whose child goes online are aware of home network-level content filters (51% for 3-4s and 57% for 5-15s). Awareness is, however, lower compared to last year for parents of 3-4s (51% vs. 66%) and for parents of 5-15s (57% vs. 62%), as is use of these filters among parents of 3-4s (29% vs. 39%). A third of parents of 5-15s use these filters, comparable to last year.
- Parents of 3-4s and 5-15s are also less likely to be aware of parental control software[90] compared to 2017 (54% vs. 64% for 3-4s and 60% vs. 65% for 5-15s), although use is unchanged.
- Parents are satisfied with content filters: as in previous years, more than nine in ten parents of 5-15s who use home network-level (93%) or parental control software content filters (91%) consider them useful, and more than seven in ten users of each type of content filter say they block the right amount of content.
- Half 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 use other types of supervision (49%) or because they trust their child to be sensible/ responsible (48%).
- Around half of parents of 3-4s (47%) and more than half of parents of 5-15s (56%), whose child uses a smartphone or tablet, are aware of at least one of the three tools we asked about for restricting app installation or use. At least one in five parents of 3-4s (21%) and 5-15s (29%) use any of these three tools.
- More than a third of parents of 3-4s (35%) and eight in ten (81%) parents of 5-15s whose child go online have ever talked to their child about how to stay safe online; the likelihood of this increases with age. While parents of 3-4s are more likely to have done this since last year (35% vs. 26% in 2017), the reverse is true for parents of 5-15s (81% vs. 85%) – this is due to a decrease among parents of 12-15s (87% vs. 92%).

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[90] Software such as Net Nanny or McAfee Family Protection which is set up on a particular device used to go online.

- Two in five parents of 8-11s (40%) and seven in ten parents of 12-15s (71%) with their own mobile phone say their child is allowed to keep their phone with them at bedtime; fewer parents say their child is allowed to keep their tablet with them at bedtime (28% for 8-11s and 61% for 12-15s).
- Parents of 5-15s whose child uses Instagram or Snapchat are more likely than last year to be aware that these sites have a minimum age requirement (66% vs. 50% for Instagram and 60% vs. 44% for Snapchat). Despite this increase in awareness, parents are no more likely to correctly identify the minimum age of 13 for use of these sites or apps (28% vs. 21% in 2017 for Instagram and 21% vs. 15% for Snapchat).
- Among parents whose child has a mobile phone, 45% of parents of 8-11s and 33% 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 (82%) than for 12-15s (72%).
- 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.
- More than half of parents of 3-4s (56%) and 5-15s (62%) say it is possible to set up voluntary PINs on the TV service(s) used at home. A third of parents of 3-4s (32%) and 38% of parents of 5-15s use voluntary PINs.

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[91] including content filters[92], PIN/ passwords, safe search and other forms of technical mediation;
- regularly[93] talking to the child about how to stay safe online;
- rules around what the child does online;[94] 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 122 shows the relationship between the four types of mediation that parents might use to regulate their child’s use of the internet.[95]

Nearly all parents whose child goes online use at least one of the approaches that we asked about; one in five parents of 3-4s (22%) and more than a third of parents of 12-15s (37%) use all four.

As in 2017, parents of 8-11s (46%) who go online are more likely to say they use all four types of mediation than parents of 5-7s (35%) and parents of 12-15s (31%). Parents of 3-4s are the least likely (22%) to use all four types of mediation, although this is more likely compared to last year (16%).

Few parents of each age group use only one approach, with the exception of 3-4s’ parents, of whom 13% use only supervision.

Three per cent of parents of both 3-4s and 5-15s do not use any of the four approaches. The likelihood of not using any of these elements is higher for parents of 12-15s (8%) than for parents of 3-4s (3%), 5-7s (1%) and 8-11s (1%). Of the 4% of parents of 5-15s who do not use any of the four approaches, half of these (2%) *have* spoken to their child about staying safe online, but less frequently than every few months.

Parents of internet users aged 3-4 in ABC1 households are more likely than those in C2DE households to use all four forms of mediation (27% vs. 17%).

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[91] ‘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.

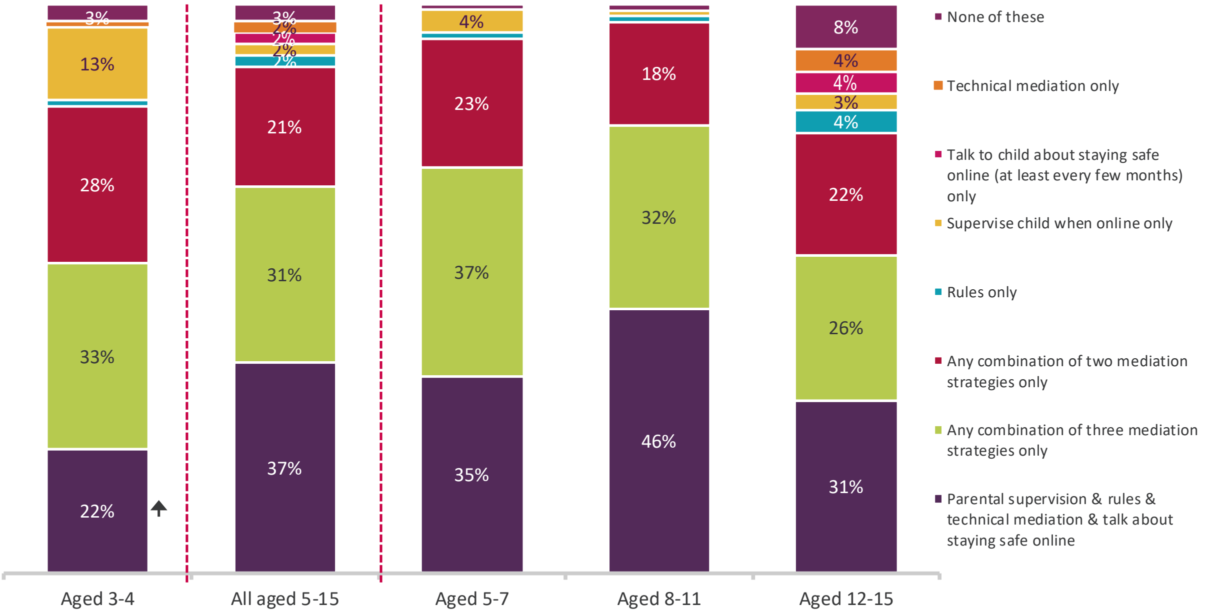
[92] Content filters include ISP home network-level filters and parental control software such as McAfee and Net Nanny.

[93] In this instance ‘regularly’ is defined as talking to the child at least every few months.

[94] The rules included here relate to any of the rules about what the child does online, as shown in Figure 135

[95] Subsequent sections in this chapter of the report look at each of these forms of mediation in more detail.

Figure 122: Combinations of online mediation strategies used by parents of 3-15s whose child goes online: 2018



Derived from several questions

Base: Parents of children who go online (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15).

Significance testing shows any change between 2017 and 2018.

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.

The first two of these six tools 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 123 to Figure 126.

Use and awareness of the remaining four technical tools is shown for parents of 3-4s in Figure 128 and for parents of 5-15s in Figure 129.

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[96].

The remaining three tools that parents were asked about relate specifically to app installation and use, and are analysed separately in Figure 130 and Figure 131

Awareness of content filters has decreased since last year among parents of 3-15s

More than half 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 (51% for 3-4s and 57% for 5-15s). Levels of awareness are similar for parental control software, at 54% among parents of 3-4s and 60% among parents of 5-15s. Since 2017, awareness of both these types of content filter has decreased for parents of 3-4s and 5-15s[97].

Three in ten parents of 3-4s and a third of parents of 5-15s use home network-level filters; use is less likely among parents of 3-4s compared to last year (39%).

About a quarter of parents of 3-4s (26%) and three in ten parents of 5-15s use parental control software; this is unchanged since 2017.

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 5-7s (34%) are more likely than parents of 12-15s (26%) to use parental control software.

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[96] 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, 47% of 3-4s and 87% of 5-15s with broadband access go online.

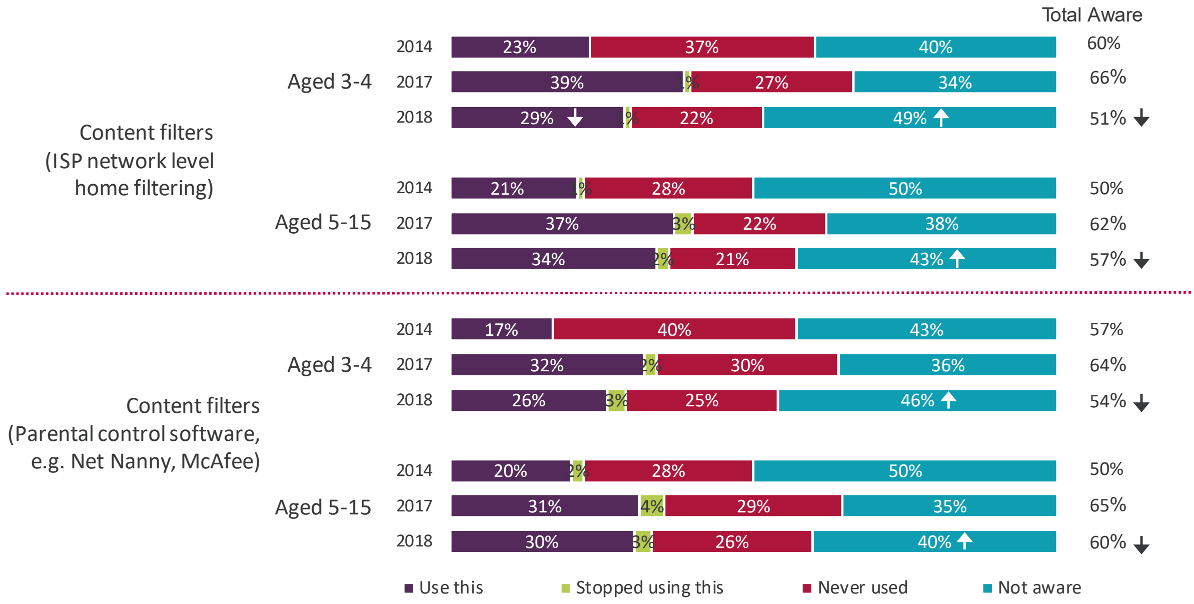
[97] Among parents of 5-15s awareness of parental control software increased between 2016 and 2017 from 59% to 65%, so this decrease suggests that awareness is returning to levels previously seen in 2016.

- The overall decrease in awareness of parental control software since 2017 among 5-15s overall is attributable to a decrease in awareness among parents of 8-11s (57% vs. 67%). The decrease in awareness of network-level filters among parents of 5-15s is not attributable to parents of any particular age group of children.

In 2018, parents of 3-4s in ABC1 households are more likely than those in C2DE households to be aware of both types of content filters (60% vs. 42% for network-level filters and 61% vs. 46% for parental control software). This increase in awareness among ABC1 parents of 3-4s only contributes to the increased use of network-level filters (34% ABC1 vs. 22% in C2DE households).

Compared to the average for 5-15s, parents in AB households are more likely to be aware of network-level filters (64% vs. 57%) but are no more likely to use them. While awareness of network level filters among parents in DE households does not differ from the average, parents in DE households are less likely to use these (27% DE vs. 34%).

Figure 123: Parents of 3-4s and 5-15s who have home broadband and whose child goes online, use and awareness of content filters: 2014, 2017, 2018



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 (293 parents of 3-4s, 1222 parents of 5-15s). Significance testing shows any change between 2017 and 2018.

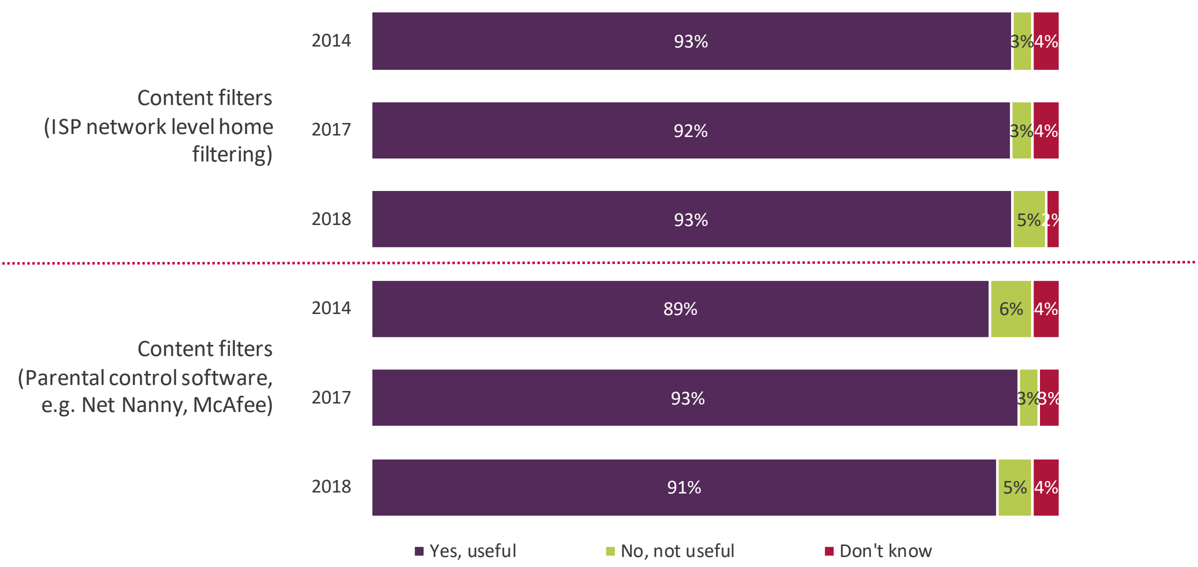
More than nine in ten parents of 5-15s who use content filters consider them useful

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[98] are shown in Figure 124.

Ninety-three per cent of parents who use home network-level content filters consider them useful, and a similar proportion (91%) say this about parental control software.

Very few parents of 5-15s who use each tool said they did not consider the tools useful (5%).

Figure 124: Parents of 5-15s who use filters, usefulness of technical tools: 2014, 2017, 2018



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).

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[98] In 2018 it not possible to show the data for parents of 3-4s who use network-level filters or parental control software, due to a low base size of 82 and 74 interviews respectively.

As in 2017, more than seven in ten parents of 5-15s who use each type of content filter say it blocks the right amount of content

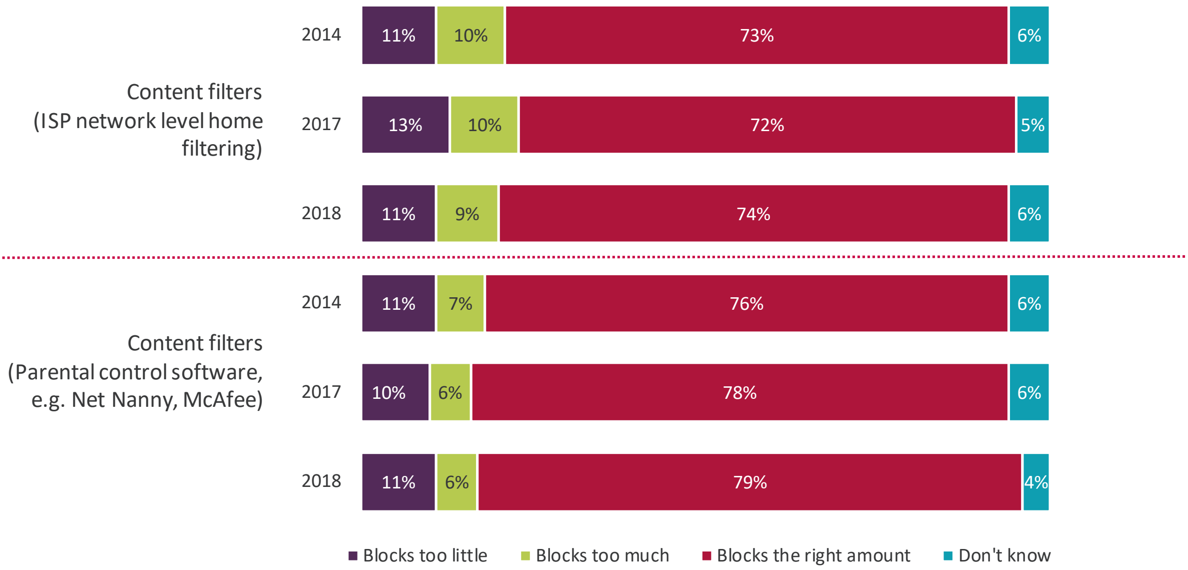
Parents who use each of the content filters were asked whether they felt these tools blocked too much, too little or the right amount of content. The results are shown in Figure 125 for parents of 5-15s[99].

Around three-quarters who use home network-level content filters say they block the right amount of content (74%), while one in ten say they block too little (11%) or block too much (9%). 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 (79%), while one in ten say it blocks too little (11%). Six per cent say it blocks too much. Each of these responses is also unchanged compared to last year.

Compared to those in ABC1 households, parents of 5-15s in C2DE households who use network-level filters are more likely to say that these filters block too little (16% C2DE vs. 9% ABC1).

Figure 125: Parents of 5-15s who use content filters, perception of technical tools blocking too much or too little: 2014, 2017, 2018



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).

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[99] In 2018 it not possible to show the data for parents of 3-4s who use network-level filters or parental control software, due to a low base size of 82 and 74 interviews respectively.

Parents of 5-15s who use home network-level filters are less likely than in 2017 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[100] are shown in Figure 126.

Around one in seven parents of 5-15s who use home network-level filters (15%) and one in ten using parental control software feel their child can bypass these controls. Compared to 2017, parents are less likely to say their child can bypass home network-level filters (down from 21%), although this decrease follows a previous increase between 2016 and 2017 (from 15% to 21%). Parents of 5-15s are also less likely to say their child can bypass parental control software (10% vs. 16% in 2017).

One in five parents of 12-15s say their child can bypass home network-level filters, and 13% say they can bypass parental control software. As shown earlier (at Figure 84), this compares to 17% of 12-15s (who go online and who opted to respond) who say they know how to disable online filters and 5% who have done this.

Compared to those in ABC1 households, parents of 5-15s in C2DE households are more likely to say their child can bypass these controls, whether network level filters (22% C2DE vs. 11% ABC1) or parental control software (16% vs. 7%).

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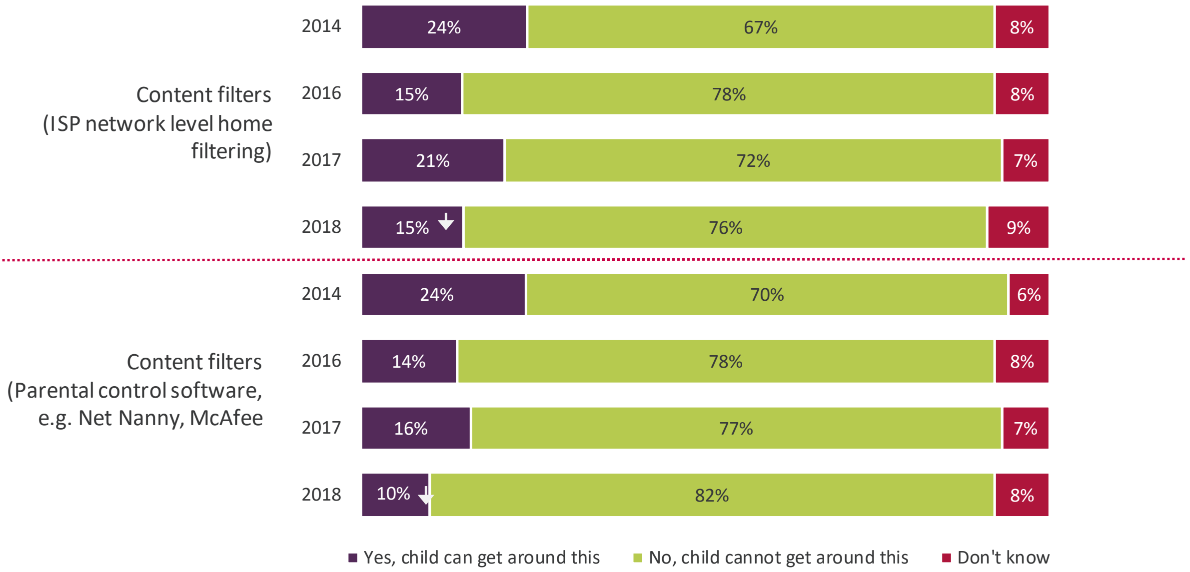
[100] In 2018 it not possible to show the data for parents of 3-4s who use network-level filters or parental control software, due to a low base size of 82 and 74 interviews respectively.

Figure 126: Parents of 5-15s who use content filters, perception of child's ability to bypass technical tools: 2014, 2016, 2017, 2018



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 2017 and 2018.

Reasons for not using content filters

Parents without home network-level filters say they either use other mediation strategies or trust their child to be sensible

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 these, and were asked to say whether any of these reasons applied.

Figure 127 below shows the results among parents of 5-15s in 2018.[101] Half of parents of 5-15s (49%) say they opt not to use content filters because they prefer to use other mediation strategies (like supervision/ rules/ talking to their child) or because they trust their child to be sensible/ responsible (48%). One in five say it is because their child learns how to be safe online at school (21%) or because their child is always supervised (21%), while one in six say it is because they don't know how

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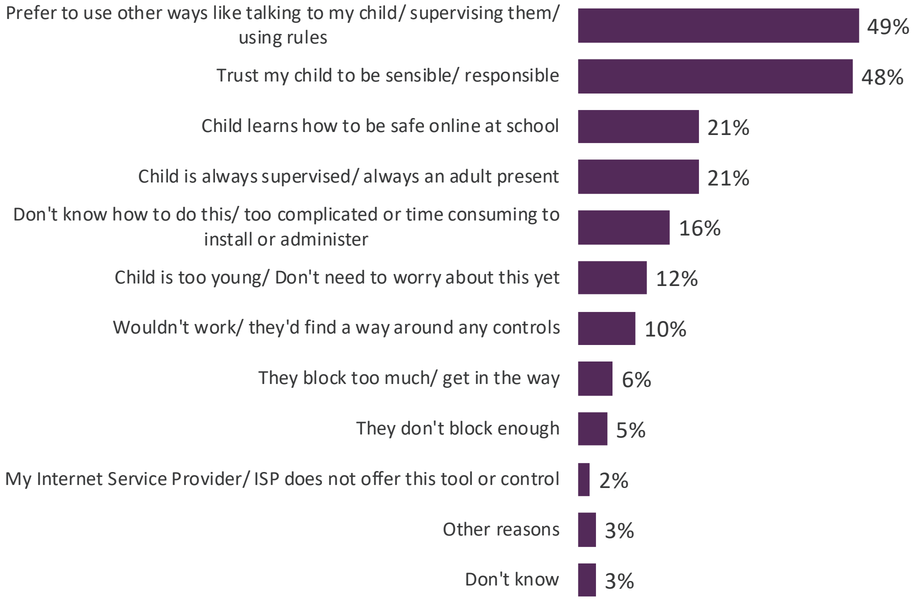
[101] Low base sizes prevent analysis among parents of 3-4s. Changes to the question in 2018 (the inclusion of additional response options) mean that it is not possible to make a year-on-year comparison.

to do it, or because it is too complicated or time consuming to install (16%). Slightly more than one in ten (12%) say the child is too young so they don’t need to worry about it yet, and one in ten think their child would find a way around the controls. All other responses are given by less than one in ten parents.

Trusting the child to be sensible or responsible increases with the age of the child; 18% of parents of 5-7s give this response, compared to 38% of parents of 8-11s and 72% of 12-15s. More than a third of parents of 5-7s (36%) say their child is too young/ they don’t need to worry about this, compared to one in ten parents of 8-11s (9%). Parents of 5-7s (31%) and 8-11s (26%) are more likely than parents of 12-15s (10%) to say their child is always supervised.

Parents of 5-15s in ABC1 households are twice as likely as those in C2DE households to say they do not use home network-level filters because their child learns about how to be safe online at school (28% vs.14%).

Figure 127: 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: 2018



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 (280).

Use of other technical tools to manage online access and use

Awareness of safe search on search engine websites is lower than in 2017 among parents of 5-15s

Measures of use and awareness of the remaining four technical tools, as well as content filters, are shown for parents of 3-4s in Figure 128 and for parents of 5-15s in Figure 129.

As in 2017, there is only one of these remaining four tools that a majority (55%) 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 51% of parents who said they were aware of network-level home content filters, and the 54% aware of parental control software. At least two in five are aware of the YouTube restricted mode (44%) or parental controls built into the device by the manufacturer (43%) while fewer are aware of safe search on search engine websites (39%).

Of parents of 3-4s who have home broadband and whose child goes online, a third, or less, use each of these technical tools. One in three use PIN/ passwords to enter websites not already approved, while less than a quarter use YouTube restricted mode (22%). Around one in seven parents use controls built into the device by the manufacturer (15%), or safe search on search engine websites (15%). Use of all four tools is unchanged since last year among parents of 3-4s.

Parents of 3-4s in ABC1 households are no more likely than those in C2DE households to be aware of safe search on search engine websites, but they are twice as likely to use this particular tool (20% vs. 9%). Awareness of YouTube restricted mode is higher among parents of 3-4s in ABC1 households (50% vs. 36% in C2DE households), although ABC1 parents are more likely to say they *do not* use this particular control (26% vs. 16% in C2DE households).

As shown in Figure 129, awareness of each of the remaining four tools 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 (57%), also comparable to those aware of network-level home content filters (57%) and those aware of parental control software (60%).

Awareness of these four technical tools among parents of 5-15s does not tend to vary by the age of the child. Compared to 2017, awareness of safe search on search engine websites is lower among parents of 5-15s (40% vs. 47%) and this decline is attributable to lower awareness among parents of 5-7s (40% vs. 50%) and 8-11s (39% vs. 49%).

In 2018, there is only one difference by gender within age, parents of boys aged 12-15 are more likely to be aware of safe search on search engine websites (46 % vs. 36%).

Use of each of the four tools among parents of 5-15s is also similar to use among parents of 3-4s. Around three in ten parents of 5-15s use PIN/ passwords required to enter websites (29%) and one in five use parental controls built into the device by the manufacturer or restricted mode on YouTube, with fewer parents using safe search on search engine websites (17%).

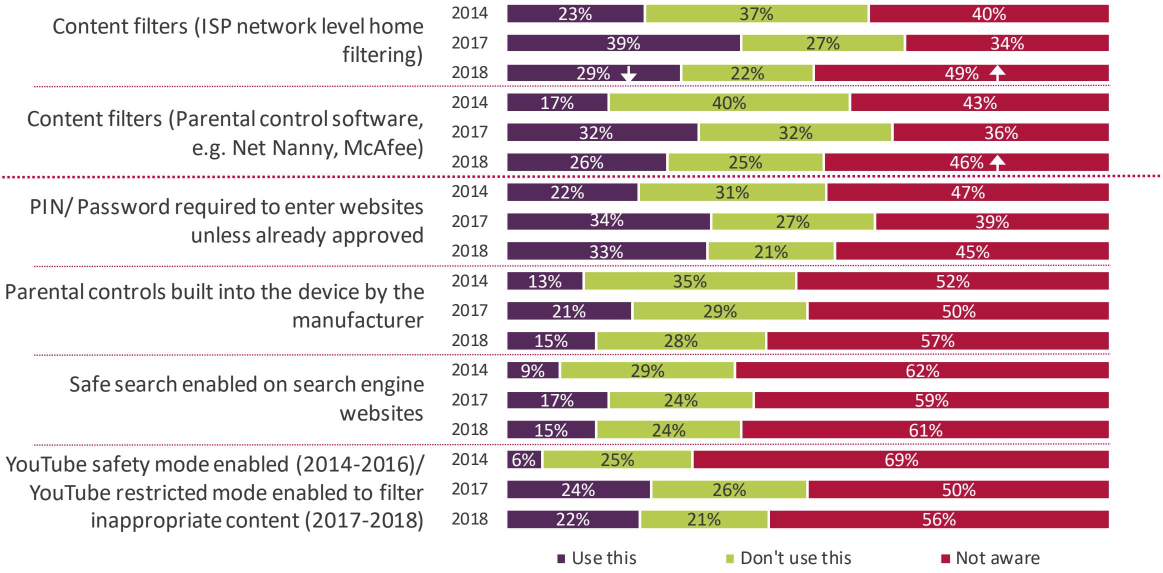
Parents of 8-11s are more likely than parents of 12-15s to say they use three controls: parental controls built into the device by the manufacturer (23% for 8-11s vs. 17% for 12-15s), safe search on search engine websites (21% vs. 13%) and YouTube restricted mode enabled (25% vs. 14%). Parents of 5-7s are also more likely than parents of 12-15s to have enabled YouTube restricted mode (23% vs. 14%) and to use PIN/ passwords required to enter websites (32% vs. 25%).

Looking across all six of the technical tools that parents were asked about, 77% of parents of 3-4s and 83% 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.

More than half of parents of 3-4s (56%) and 5-15s (59%) use at least one of these six tools; use is lower among parents of 3-4s (56%) and 12-15s (52%) than among parents of 5-7s (65%) and 8-11s (64%).

Parents of 5-15s in AB households are more likely than average to use YouTube restricted mode (26% vs.20%).

Figure 128: Parents of 3-4s who have home broadband and whose child goes online, use and awareness of technical tools: 2014, 2017, 2018

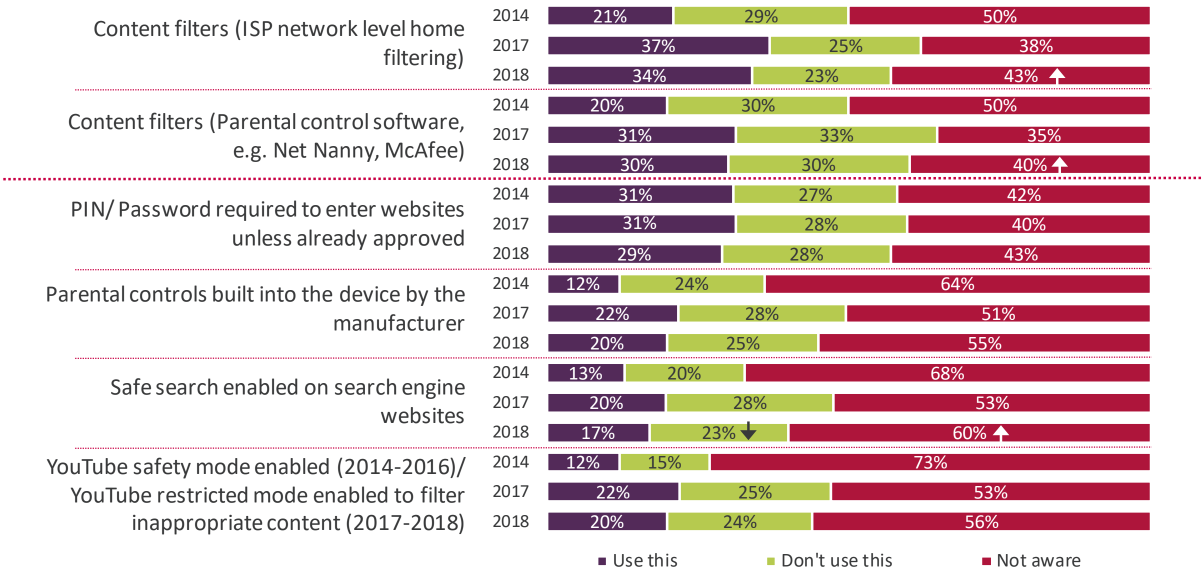


QP31A-F Please read each of the descriptions shown on this card. Before today, were you aware of any of these types of technical tools or controls? Which ones? (prompted responses, multi coded)/ QP32A-F Do you use any of these types of technical tools or controls to manage your child's access to online 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 (293).

Significance testing shows any change between 2017 and 2018.

Figure 129: Parents of 5-15 who have home broadband and whose child goes online, use and awareness of technical tools: 2014, 2017, 2018



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 (1222).

Significance testing shows any change between 2017 and 2018.

Awareness and use of tools for managing app installation and use is unchanged since 2017 among parents of 3-15s

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.

Figure 130 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 131 shows this among parents of 5-15s.

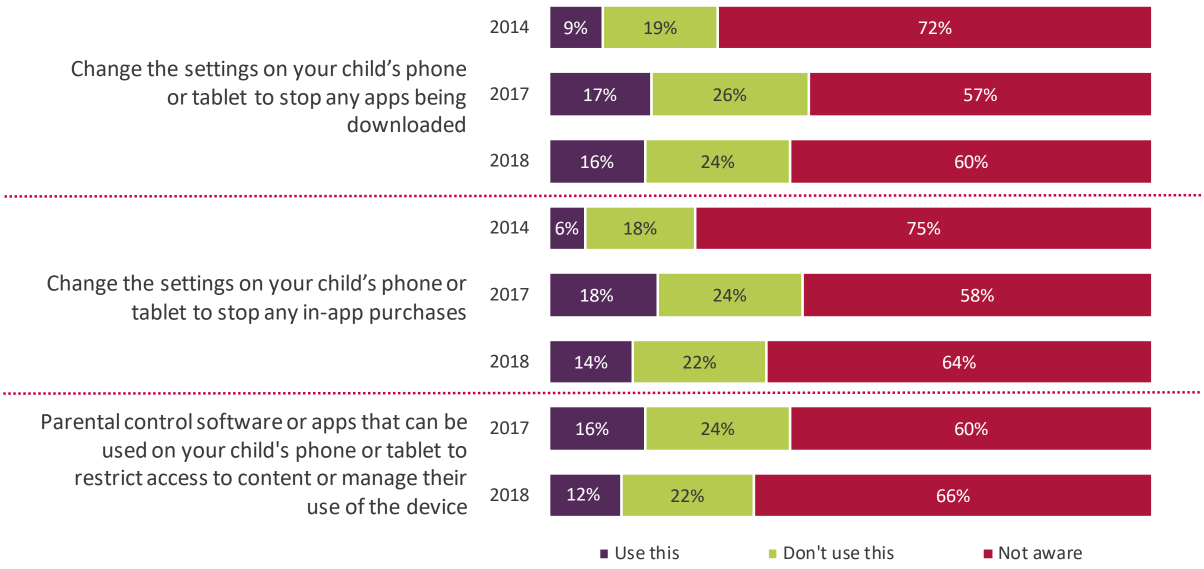
Around half of parents of 3-4s (47%) and more than half of parents of 5-15s (56%) whose child uses a smartphone or tablet are aware of any of these three tools, and at least one in five of parents of 3-4s (21%) and 5-15s (29%) use any of them.

At least one-third of parents of 3-4s and two in five parents or 5-15s whose child uses a smartphone or tablet are aware of each of these tools. Parents of 5-15s are more likely than parents of 3-4s to be aware of two tools: changing the settings to prevent in-app purchases (43% vs. 36%) and use of software/ apps to restrict access to content or manage their use of the device (41% vs. 34%). These two tools are also more likely to be used by parents of 5-15s than parents of 3-4s. Among parents of 5-15s, use of each tool is more likely among parents of 8-11s than parents of 12-15s.

Parents of 3-4s in ABC1 households are more likely than those in C2DE households to know that it is possible to change the settings to stop apps being downloaded (47% vs. 32%).

Parents of 5-15s in DE households are less likely than average to be aware of two tools: changing settings to prevent apps being downloaded (35% vs. 44%) and to prevent in-app purchases (34% vs. 43%). Use of the first tool is lower than average only for those in DE households (15% vs. 20%).

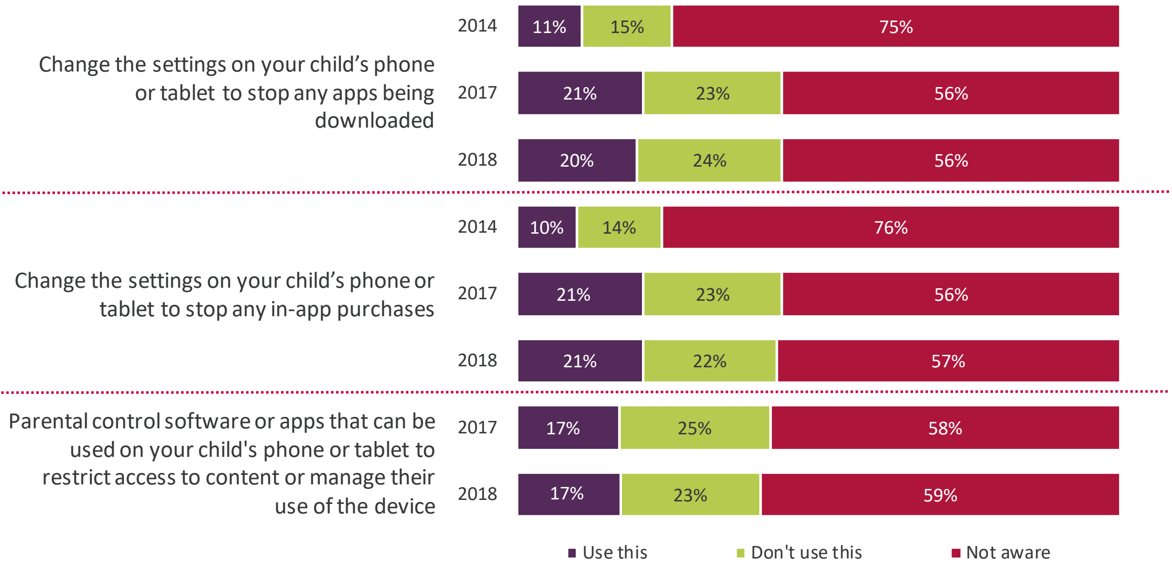
Figure 130: Parents of 3-4s whose child uses a smartphone or tablet computer, use and awareness of technical tools/ controls for these devices: 2014, 2017, 2018



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 (365).

Figure 131: Parents of 5-15s whose child uses a smartphone or tablet computer, use and awareness of technical tools/ controls for these devices: 2014, 2017, 2018



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 (1218).

Talking to children about staying safe online

Compared to last year, fewer parents of 5-15s are talking to their children about staying 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[102]. The results are shown in Figure 132.

Overall, eight in ten parents of 5-15s (81%) have ever talked to their child about staying safe online. More than three in five of parents of 5-7s (64%) have done this, and it is more likely for parents of 8-11s (86%) and parents of 12-15s (87%). More than a third of parents of 3-4s whose child goes online have ever talked to their child about staying safe online (35%).

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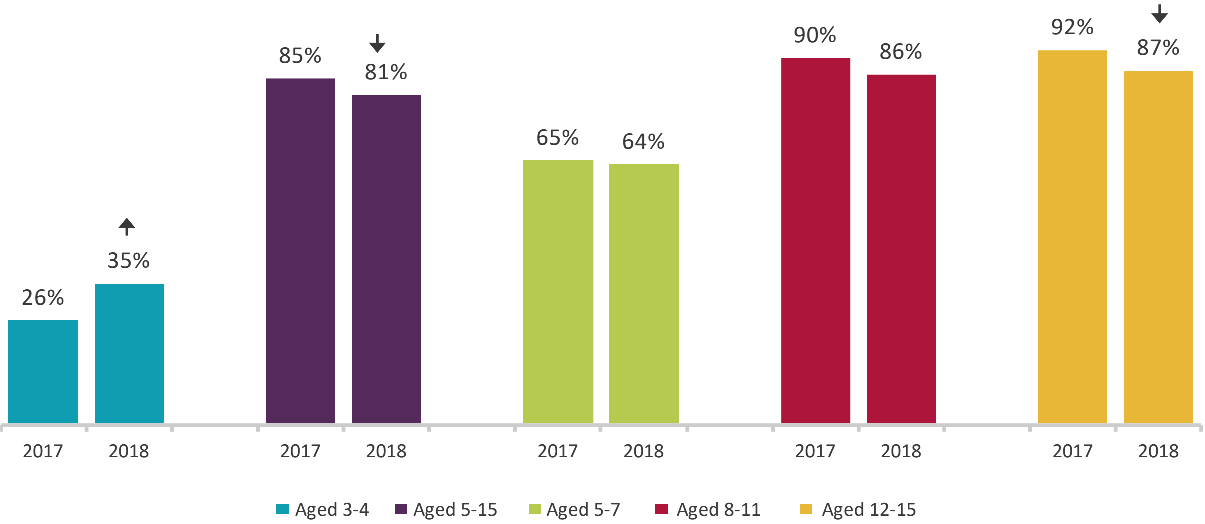
[102] If necessary, parents were provided with the following definition: For example, "have you ever discussed with them the potential dangers of things like content on sites or apps that might be unsuitable for their age, sharing too much information online, contact with people they don't know personally etc.".

Compared to last year, parents of 3-4s are more likely to have talked to their child about this (35% vs. 26%) while parents of 12-15s are less likely (87% vs. 92%).

Parents of girls aged 3-4 are more likely than parents of boys to have spoken with their child about staying safe online (41% vs. 30%).

Parents of 3-4s in ABC1 households are more likely than those in C2DE households to say they have ever spoken to their child about this (41% vs. 29%). Compared to the average for 5-15s (81%), parents in AB households are more likely to say they have spoken to the child about staying safe online (87%).

Figure 132: Parents talking to their child about staying safe online: 2017, 2018



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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15).

Significance testing shows any change between 2017 and 2018.

More than one in five parents of 3-4s say they talk to their child at least every few weeks about how to stay safe online – an increase since last year

Parents who said they had ever spoken to their child about how to stay safe online were asked how often they talked to their child about this[103]. The results are shown in Figure 133, expressed as a proportion of those whose child goes online at home or elsewhere.

More than one in five parents of 3-4s (22%) talk to their child at least every few weeks, an increase compared to last year (15%). A further 6% of parents of 3-4s in 2018 say they do this at least every few months.

Four in ten parents of 5-15s who go online say they talk to their child about staying safe online at least every few weeks. This is more likely for 8-11s (46%) than for 5-7s (38%) or 12-15s (35%). A further one in five parents of 5-15s (23%) 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 5-15s (62%) speak to their child at least every few months. This incidence is higher among parents of 8-11s (70%) and 12-15s (62%) and lower among parents of 5-7s (51%) and 3-4s (28%).

Parents of internet users aged 3-4 in ABC1 households are more likely than those in C2DE households to say they talk to their child every few months (34% vs.23%), on account of their being more likely to talk to them every few weeks (27% vs. 18%).

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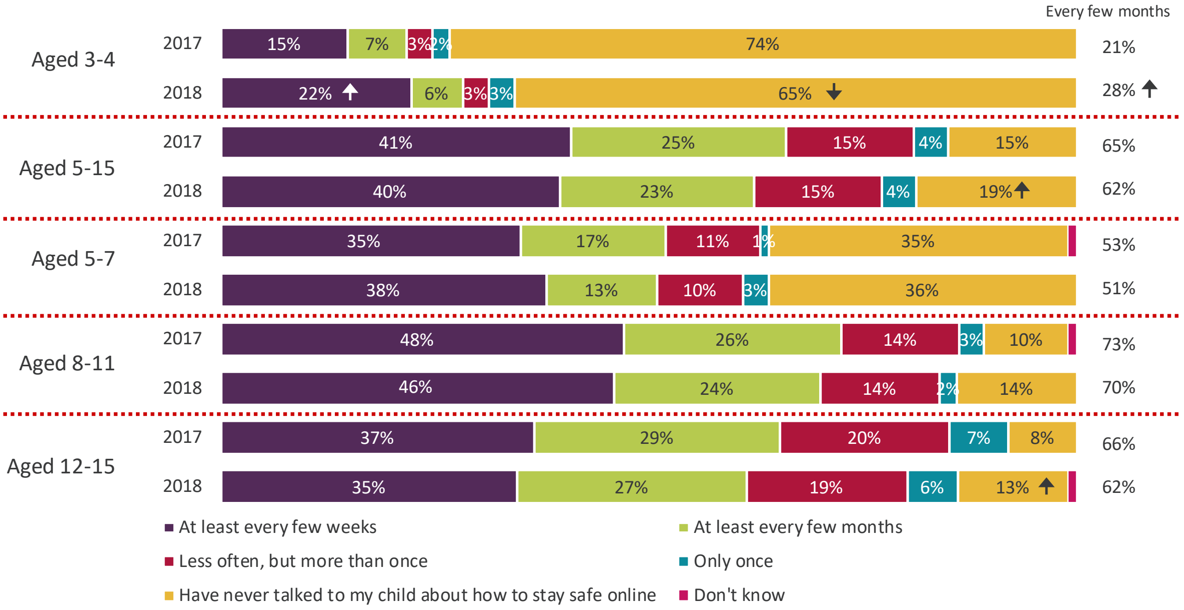
[103] This question was used in the analysis relating to 'Talking to child about how to stay safe online at least every few months' for the combinations of online mediation strategies used by parents, as shown in Figure 122, and more detail is provided in this section of the report.

Figure 133: Frequency of talking to children about how to stay safe online, by age: 2017, 2018



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 (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15).

Significance testing shows any change between 2017 and 2018.

More than four in five of parents of 5-15s have looked for or received information or advice about how to help their child stay safe online

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 stay safe online [104]. Parents were prompted with nine possible sources, with the option of nominating other sources. Figure 134 shows the responses given by parents of 3-4s and 5-15s, broken out by age.

More than four in five of parents of children aged 5-15 (84%) have looked for or received information or advice from any source, and this is more likely for parents of 8-11s (89%) than for parents of 5-7s (82%) or 12-15s (82%). Close to two-thirds of parents of 3-4s (64%) say they have ever done this.

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[104] In 2017 parents were asked if they had ever looked for or received information or advice about how to 'manage online risks'. This change in wording appears to have impacted on the responses given, so we are not reporting a trend for this measure. The findings in 2017 for 'ever looked for or received information about how to manage online risks' were 56% for 3-4s, 78% for 5-15s, 70% for5-7s, 81% for 8-11s, 81% for 12-15s.

The most commonly-used source for parents of 3-4s and parents of 5-15s is the child's school, followed by friends and family.

Seven in ten parents of 5-15s have looked for or received information or advice from the child's school and more than a third (37%) have sourced/ received this information from friends and family. Eighteen per cent of parents of 5-15s have looked for or received information from internet service providers, while a similar proportion have asked their child (16%) or sourced /received information from the media (15%). Slightly more than one in ten have used other websites (12%) or received this information or advice from the Government or local authority (11%). All other information sources were mentioned by one in ten parents of 5-15s, or less.

Two in five parents of 3-4s have also looked for or received any information or advice from their child's school about how to help their child stay online, with 28% getting this information from family and friends. Around one in eight parents of 3-4s (13%) have looked for or received information from internet service providers.

Using family and friends as a source is more likely for parents of 8-11s (41%) and 12-15s (37%) than for parents of 3-4s (28%) or parents of 5-7s (29%). Parents of girls aged 8-11 who go online are more likely than parents of boys to say they have looked for or received this information from family or friends (46% vs. 36%).

Parents of 3-4s who go online in ABC1 households are more likely than those in C2DE households to say they have obtained this information from their child's school (46% vs. 34%).

Compared to the average (18%), internet service providers are more likely to be mentioned as an information source by parents of 5-15s in C1 households (23%) and less likely to be mentioned by parents in DE households (12%). Parents of 5-15s in AB households are also more likely than average to mention other websites that have information about how to stay safe online (17% vs. 12%).

Figure 134: Parents of 5-15s stating they have looked for or received any information or advice about how to help their child to stay safe online: 2018

All who go online	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Base	328	1304	362	459	483
From child’s school	40%	70%	70%	75%	66%
From family or friends	28%	37%	29%	41%	37%
From Internet service providers (ISPs)	13%	18%	14%	19%	20%
From your child themselves	7%	16%	13%	16%	18%
From TV, radio, newspapers or magazines	7%	15%	13%	15%	16%
From other websites with information about how to stay safe online	9%	12%	10%	13%	13%
From Government or local authority	4%	11%	11%	10%	10%
From manufacturers or retailers selling the product	6%	9%	7%	8%	11%
From the BBC	6%	7%	8%	8%	6%
From other sources	3%	3%	4%	3%	2%
TOTAL – ANY INFORMATION LOOKED FOR/ RECEIVED**	64%	84%	82%	89%	82%

*QP52 – Have you looked for or received information or advice about how to help your child stay safe online from any of these sources or in any other way? (prompted responses, multi coded) ** In 2017 parents were asked if they had ever looked for or received information or advice about how to ‘manage’ online risks*

Base: Parents of children who go online (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15).

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 the 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.

More than three-quarters of parents of 3-4s who go online (77%), and more than four in five parents of 5-15s, have at least one of these rules in place (85%). As in 2017, rules are more likely for 5-7s (88%) and 8-11s (92%) than for 3-4s (77%) and 12-15s (77%).

There is only one category of rules in place among a majority of parents of 3-4s and 5-15s: rules about the types of websites or apps their child can use (61% of parents of 3-4s and 66% of 5-15s). The next most frequently-applied category of rules among parents of 3-4s who go online is rules about how much time they spend online (46%). At least three in ten parents of 3-4s have rules in place about whom the child can contact online (34%), when they can go online (34%), spending money online (32%) or the information they can share online (30%).

Among parents of 5-15s who go online, the next most frequently-applied category of rules relates to how much time their child can spend online (53%) and whom they can contact online (51%). A similar proportion have rules about the information their child can share online (49%), or about spending money online (48%). Two in five (41%) have rules about when their child can go online.

Use 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 their child can use, and about when they can go online. Parents of 8-11s and 12-15s are more likely than parents of 5-7s to have rules about whom their child can contact, the information they can share online and about spending money.

The overall incidence of having any rules about what the child does online is unchanged since last year. But in 2018, parents of 12-15s are less likely than in 2017 to have rules about whom the child can contact online (51% vs. 60%).

In 2018, parents of 3-4s in ABC1 households whose child goes online are more likely than those in C2DE households to have rules about when their child can go online (40% vs. 28%).

Among parents of 5-15, those in AB households are more likely than average to have rules about spending money online (57% vs.48%).

Figure 135: Rules about what child does online, by age: 2018

All whose child goes online	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Rules about… Base	328	1304	362	459	483
The types of websites or apps they can use	61%	66%	74%	75%	53%
How much time they spend online	46%	53%	54%	57%	47%
Who they can contact online	34%	51% ↓	41%	58%	51% ↓
The information they can share online	30%	49%	37%	56%	50%
Spending money online	32%	48%	41%	50%	50%
When they can go online	34%	41%	45%	45%	33%
Spontaneous response: Only going online when supervised	4%	1%	2%	1%	0%
TOTAL - ANY RULES ABOUT WHAT CHILD DOES ONLINE	77%	85%	88%	92%	77%

QP26 - Do you have any of these rules about what your child does online? (prompted responses, multi coded)

Base: Parents of children who go online (328 aged 3-4, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15).

Significance testing shows any change between 2017 and 2018.

Parental supervision of mobile or tablet use at bedtime

Seven in ten 12-15s with their own mobile and six in ten with their own tablet keep these devices with them when they go to bed

In 2018, parents whose child uses a mobile phone and those whose child uses a tablet were asked whether their child is allowed to keep their mobile or tablet with them when they go to bed.

The results are shown in Figure 136 for a mobile phone and in Figure 137 for a tablet, and where base sizes allow, are shown for children who *use* these devices as well as for those who have their own mobile or tablet.

Less than half of 5-15s (45%) who use a mobile phone are allowed to keep it with them when they go to bed: this incidence ranges from 11% for 5-7s to 67% for 12-15s. Six per cent of parents of 3-4s whose child uses a mobile allow them to keep it with them at bedtime.

Compared to those who use a mobile phone, a higher proportion of children aged 5-15 who own a mobile phone are allowed to keep it with them when they go to bed (60%). Parents of 12-15s with their own mobile (71%) are more likely to say this than parents of 8-11s (40%).

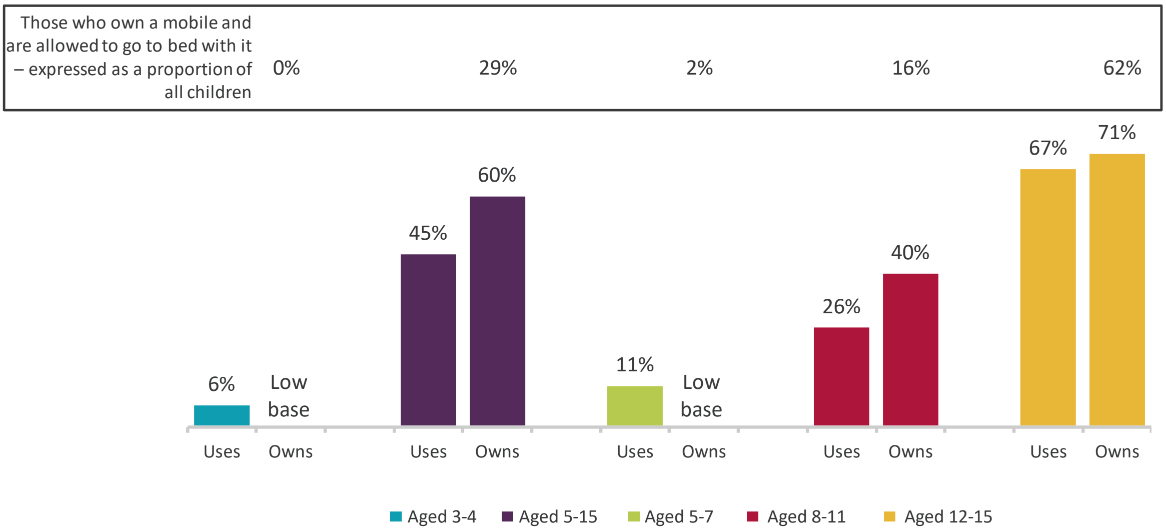
As shown in Figure 137, three in ten parents of 5-15s whose child uses a tablet say their child is allowed to keep it with them when they go to bed. Close to half of parents of 12-15s (48%) say this; more than double the figure for parents of 8-11s (22%) and nearly three times as many as parents of 5-7s (17%). One in ten parents (9%) of 3-4s who use a tablet say their child can keep it with them at bedtime.

Two in five 5-15s (39%) who own their own tablet are allowed to keep it with them when they go to bed and 18% of 3-4s with their own tablet are also allowed to do this.

Girls aged 12-15 with their own tablet are more likely than boys to be able to keep their tablet with them at bedtime (69% vs. 53%).

Children aged 8-15 who own these devices are more likely to be able to keep their mobile phone with them when they go to bed than they are to keep their tablet with them.

Figure 136: Incidence of parents allowing their child to go to bed with a mobile, among parents whose child uses and has their own mobile: 2018

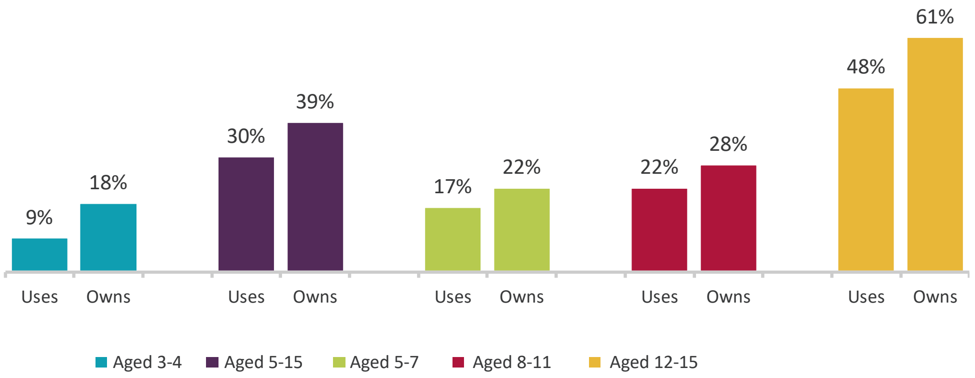


QP30A-You said earlier your child uses a mobile phone. When they go to bed are they allowed to keep the mobile phone with them?

Base: Parents of children who use a mobile phone (202 aged 3-4, 915 aged 5-15, 144 aged 5-7, 319 aged 8-11, 452 aged 12-15)/ who have their own mobile phone (5 aged 3-4, 627 aged 5-15, 29 aged 5-7, 183 aged 8-11, 415 aged 12-15)

Figure 137: Incidence of parents allowing their child to go to bed with a tablet, among parents whose child uses and has their own tablet: 2018

Those who own a tablet and are allowed to go to bed with it – expressed as a proportion of all children	3%	18%	9%	13%	31%



QP30B-You said earlier your child uses a tablet. When they go to bed are they allowed to keep the tablet with them?

Base: Parents of children who use a tablet (365 aged 3-4, 1083 aged 5-15, 334 aged 5-7, 383 aged 8-11, 366 aged 12-15)/ with their own tablet (121 aged 3-4, 668 aged 5-15, 187 aged 5-7, 234 aged 8-11, 247 aged 12-15).

Parental supervision of internet use

Close to nine in ten 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 the ways in which they might supervise their child online, and were asked whether they usually supervised their child in any of these ways when their child is online, using any type of device[105].

Figure 138 shows the responses from parents of 5-15s, and Figure 139 shows the responses from parents of 3-4s, 5-7s, 8-11s and 12-15s.

More than nine in ten parents of 3-4s (95%) and close to nine in ten parents of 5-15s (86%) say they supervise their child’s online access and use in at least one of the four ways we asked about.

Among parents of 5-15s, half say they ask them about what they are doing/ have been doing online, or are usually nearby when their child is online and regularly check what they are doing. More than one in three parents (37%) say they check the browser/ device history after the child has been online, and three in ten (30%) 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 (95%), 5-7s (98%) and 8-11s (95%), and is lower among parents of 12-15s (70%).

Broadly speaking, parents of 3-4s and 5-7s are most likely to supervise their child online by sitting beside them and watching or helping them when they are online (71% for 3-4s and 54% for 5-7s) or through being nearby and regularly checking what they do (64% for 3-4s and 69% for 5-7s). Parents of 8-11s are most likely to supervise their child by being nearby and regularly checking what they do (58%) or by asking about what they have been doing online (56%). Parents of 12-15s are most likely to ask about what their child has been doing online (48%) or to check the browser or device history after the child has been online (37%).

While a minority of parents of 3-4s supervise their child through asking about what they have been doing online or by checking the browser or device history, both these measures have increased since last year (from 25% to 33% and from 16% to 24% respectively). Parents of 5-7s are also more likely than in 2017 to supervise their child’s internet use by asking them about what they have been doing (45% vs. 37%).

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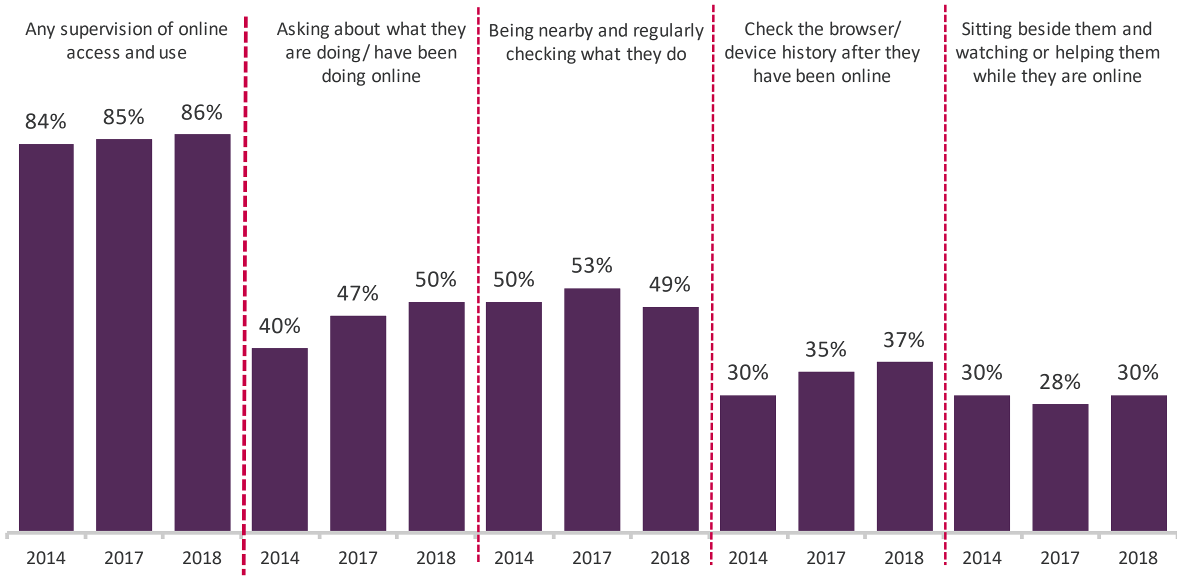
[105] This question was used in the analysis relating to parental supervision for the combinations of online mediation strategies used by parents, as shown in Figure 122, and more detail about online supervision is provided in this section of the report.

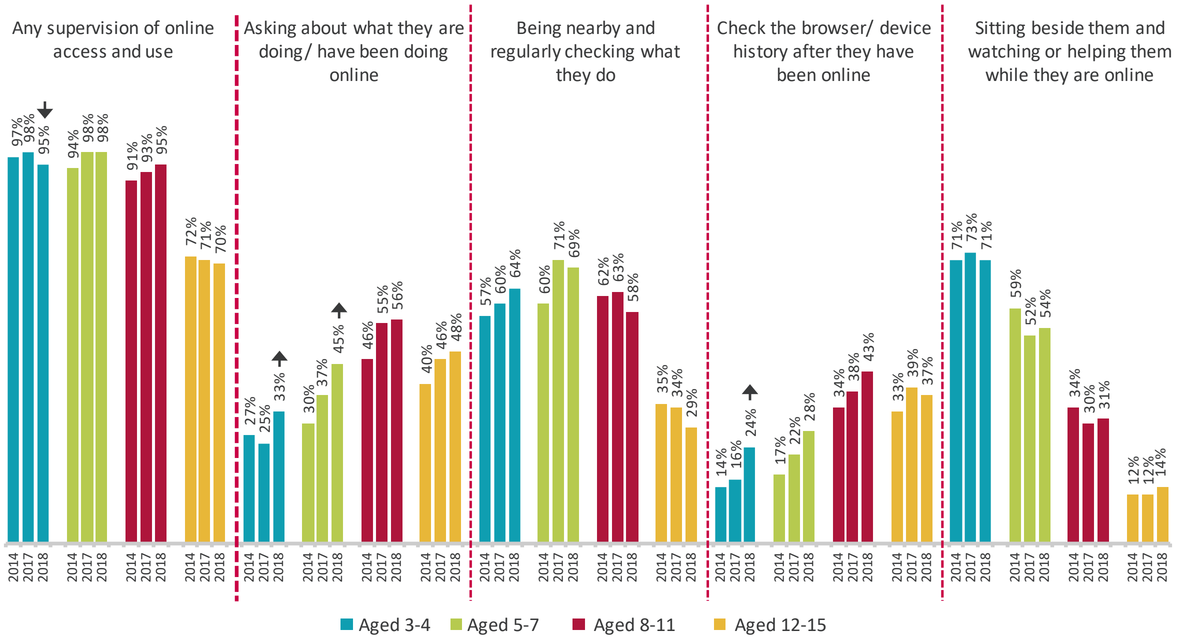
Figure 138: Types of parental supervision when child goes online, among parents of 5-15s: 2014, 2017, 2018



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 (1304 aged 5-15).

Figure 139: Types of parental supervision when child goes online, by age: 2014, 2017, 2018



QP27. When your child goes online on any devices, would you usually supervise them, in any of these ways? (prompted response, multi coded).

Base: Parents whose child goes online (328 aged 3-4, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15).

Significance testing shows any change between 2017 and 2018.

Awareness of and attitudes towards minimum age requirements on social media sites/ messaging apps

Parental awareness of a minimum age requirement for Instagram and for Snapchat has increased compared to 2017

Parents of 5-15s whose child has a profile or account on four specific social media or messaging sites or apps 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 140 for Facebook/ Facebook Messenger, Instagram and Snapchat: for each of these sites/ apps the minimum age requirement is 13. The data for WhatsApp have not been shown in Figure 140, as in May 2018 (when the fieldwork on this study had started) WhatsApp announced its intention to increase the minimum age requirement from 13 to 16[106]. The results for WhatsApp are therefore discussed separately below.

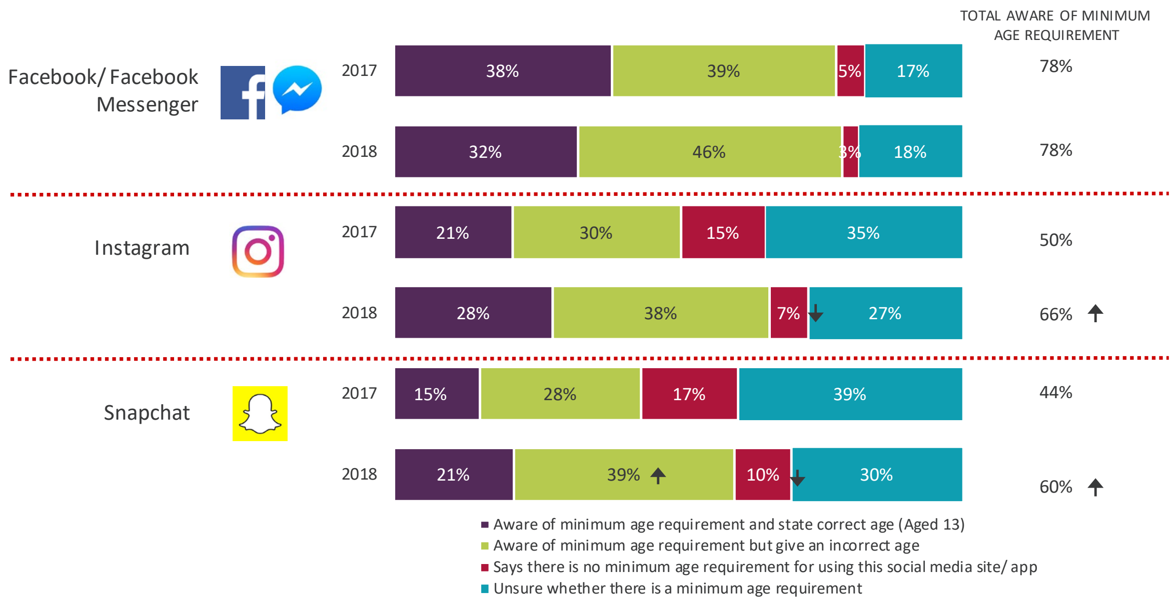
About three in four parents of 5-15s whose child uses either Facebook or Facebook Messenger are aware of a minimum age requirement for these sites/apps (78%) but less than half of these parents give the correct response of 13 years old (32%).

Two-thirds of parents of 5-15s whose child uses Instagram (66%) are aware of a minimum age requirement on this site/ app, more than in 2017 (50%). Close to three in ten (28%) give the correct response.

Three in five parents whose child uses Snapchat say there is a minimum age requirement on this site; this has also increased since 2017 (44%). But only a third of these (21%) gave the correct response; twice as many gave an incorrect response (39%). Parents of 5-15s are more likely to give an incorrect response than in 2017 (39% vs. 28%).

Given the changes to the minimum age requirement for WhatsApp that occurred during fieldwork, it seemed appropriate to include any mention of either age 13 or age 16 as a correct response. Close to half of parents (48%) whose child uses WhatsApp are, therefore, aware of a minimum age requirement on this site/ app. Around half of these parents (23%) give a response that can be regarded as correct (i.e. 13 or 16).

Figure 140: Parental awareness of minimum age requirement for particular social media sites/ apps used by their child aged 5-15: 2017, 2018



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[106] As of May 2018, WhatsApp's minimum age of use is 16 for users in the European Union. It was previously 13.

QP46A/B/C – 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 (229)/ Instagram (208)/ Snapchat (191).

Significance testing shows any change between 2017 and 2018.

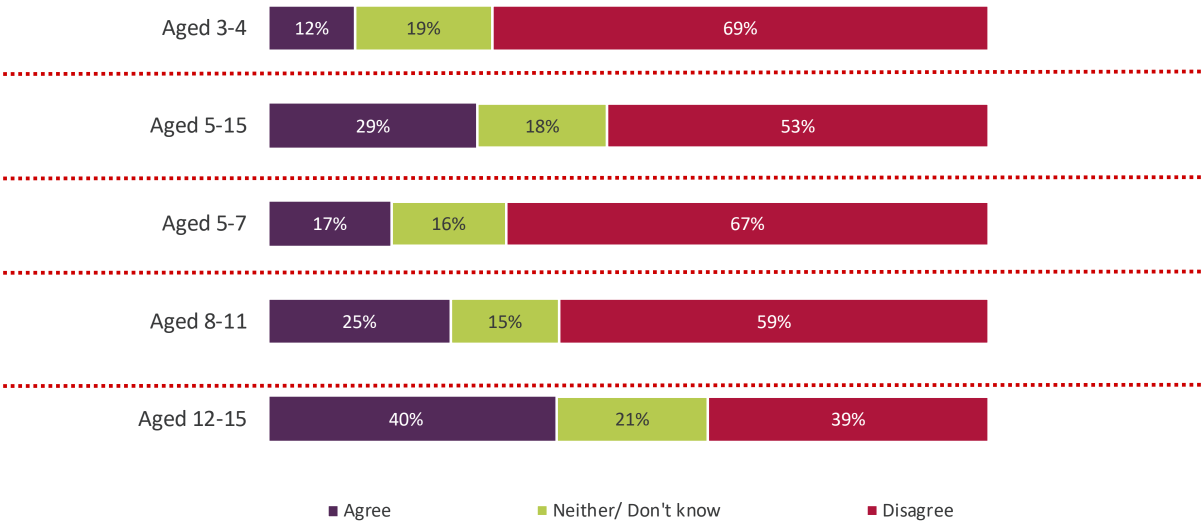
Three in ten parents of 5-15s whose child goes online say they would allow their child to use social media or messaging sites/ apps before reaching the required minimum age

Parents of 5-15s whose child goes online[107] 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".

Three in ten parents of 5-15s agree (29%) with this statement, while just over half disagree (53%). Agreement is higher among parents of 8-11s (25%) and 12-15s (40%) than among parents of 3-4s (12%) and 5-7s (17%).

In 2018, parents of girls aged 8-11 or 12-15 are more likely than parents of boys to agree (30% vs. 21% for 8-11s and 46% vs. 35% for 12-15s). Parents of 5-15s in AB households are more likely than average to disagree (61% vs. 53%).

Figure 141: 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 goes online: 2018



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[107] It is not possible to show a trend for this measure as in 2017 this question was asked of parents whose child uses social media or messaging sites or apps, rather than those whose child goes online.

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 goes online (328 aged 5-15, 1304 aged 5-15, 362 aged 5-7, 459 aged 8-11, 483 aged 12-15).

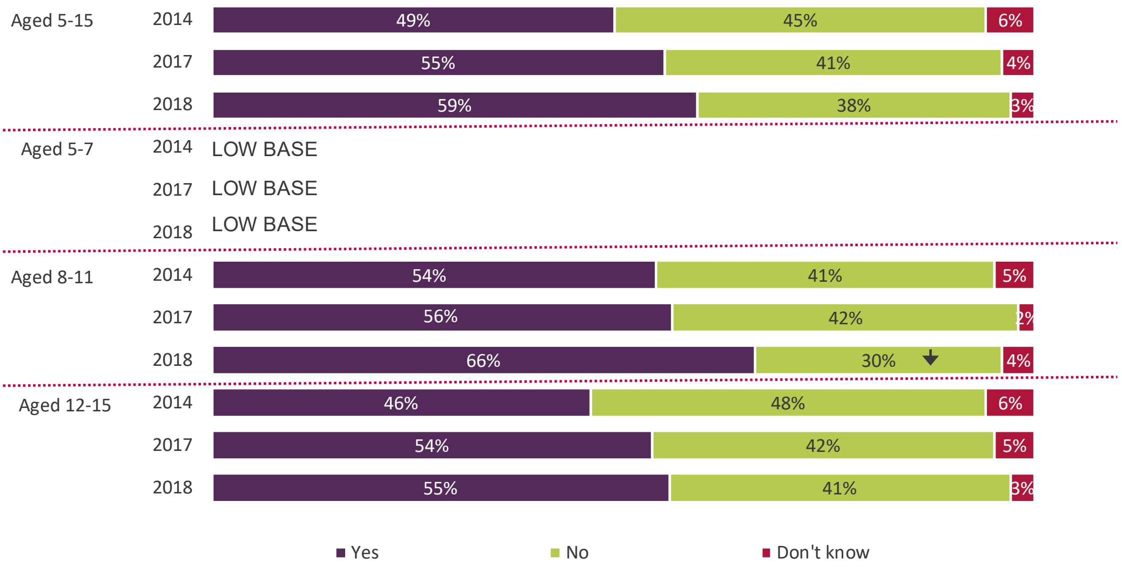
Parental controls for mobile phones

One in six parents of 5-15s whose child has a mobile phone and are aware of the bar on adult content are unsure whether this bar 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 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 142 for parents of 5-15s, 8-11s and 12-15s.[108] Three in five parents of 5-15s say they are aware of this bar on adult content (59%) with nearly two in five saying they are not aware (38%). Awareness is higher among parents of 8-11s (66%) than among parents of 12-15s (55%). There has been no change since 2017 in the proportion of parents stating they are aware of this bar.

Figure 142: Awareness of bar on adult content for mobile phones, by age: 2014, 2017, 2018



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[108] Low base sizes prevent analysis among parents of 3-4s and 5-7s.

QP61 - The UK mobile phone networks - O2, Vodafone, EE and so on 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)

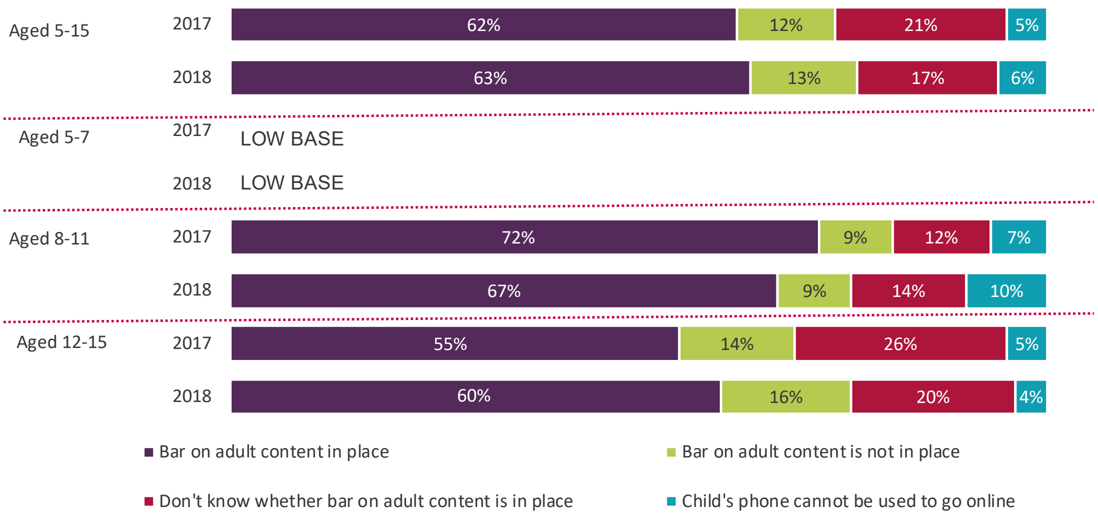
Base: Parents whose child has a mobile phone (627 aged 5-15 183 aged 8-11, 415 aged 12-15).

Significance testing shows any change between 2017 and 2018.

Parents aware of the bar on adult content were then asked whether it was set up on their child’s phone; the results are shown in Figure 143. 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 (63%). This incidence does not vary by age between 8-11s and 12-15s.

When re-basing these figures on parents whose child has a mobile phone (rather than on parents being aware of the bar on adult content), more than a third of parents of 5-15s say the bar is in place (37%). This is more likely for 8-11s (45%) than for 12-15s (33%).

Figure 143: Use of bar on adult content for mobile phones, by age: 2017, 2018



QP62 - Do you know whether the bar on accessing adult content is set up on your child's mobile phone? (unprompted responses, single coded)

Base: 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 (370 aged 5-15, 123 aged 8-11, 229 aged 12-15).

Parental rules for mobile phones

As in 2017, rules about the child’s mobile phone use are more likely for 8-11s than for 12-15s

As shown in Figure 144, most parents of 8-11s and 12-15s[109] whose child has their own mobile phone have put in place at least one of the rules that we asked about. At an overall level, rules about mobile phone use are more likely for 8-11s (82%) than for 12-15s (72%).

Three of the five types of rules are more likely among parents of 8-11s than among parents of 12-15s: rules about how much time they spend using their phone (55% vs. 43%), rules about whom they are in contact with (49% vs. 40%) and rules about when they can use their phone (43% vs.33%).

There has been no change in these responses since 2017.

Figure 144: Parental rules for mobile phones, by age: 2018

All whose child has a mobile phone		Aged 8-11	Aged 12-15
Rules about…	Base	183	415
How much time they spend using their phone		55%	43%
How much money they can spend on their phone		43%	44%
Who they are in contact with on their phone		49%	40%
Downloading apps onto their phone		47%	38%
When they can use their phone		43%	33%
TOTAL - ANY RULES ABOUT THEIR CHILD’S MOBILE PHONE USE		82%	72%

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 (183 aged 8-11, 415 aged 12-15).

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[109] Low base sizes prevent analysis among parents of 3-4s and 5-7s.

Parental awareness of using games consoles/ players to go online

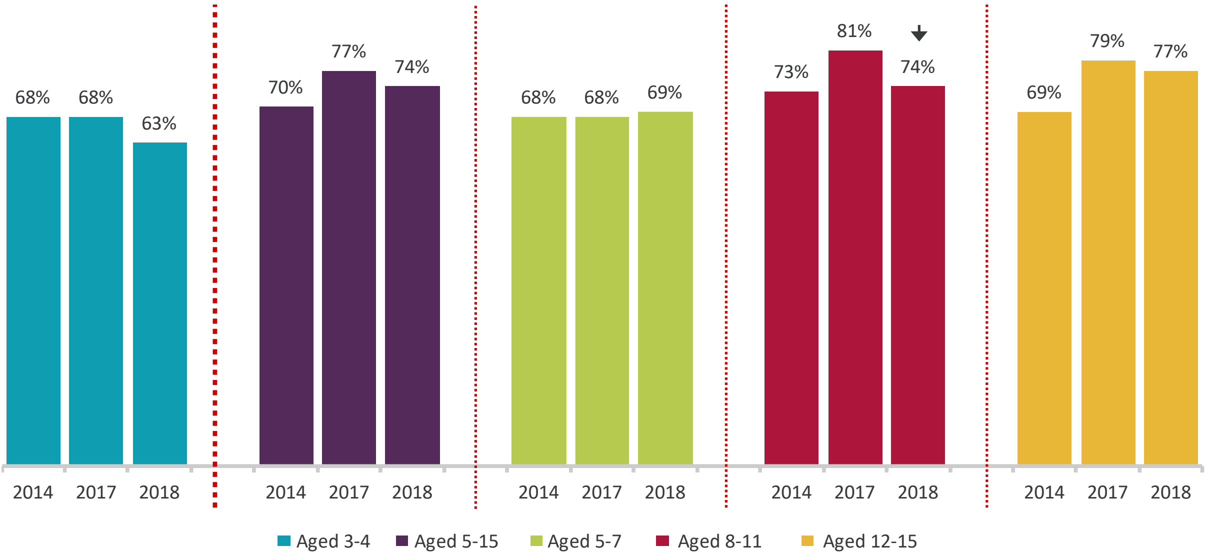
Three-quarters of parents of 5-15s are aware that games consoles/ players can be used to go online

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 145, more than three in five parents of 3-4s (63%) and three-quarters of parents of 5-15s (74%) are aware that games consoles/ players can be used in this way. Parents of 12-15s (77%) are more likely than parents of younger children to be aware of this (63% for 3-4s, 69% for 5-7s). Three-quarters of parents of 8-11s are aware that games consoles/ players can be used to go online, lower than in 2017 (81%).

Parents of boys aged 12-15 are more likely than parents of girls to be aware of this (86% vs. 68%).

Figure 145: Parental awareness of use of games consoles/ players to go online: 2014, 2017, 2018



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: Parents of children aged 3-4 or 5-15 (630 aged 3-4, 1430 aged 5-15, 448 aged 5-7, 497 aged 8-11, 485 aged 12-15).

Significance testing shows any change between 2017 and 2018.

Parental controls on gaming devices

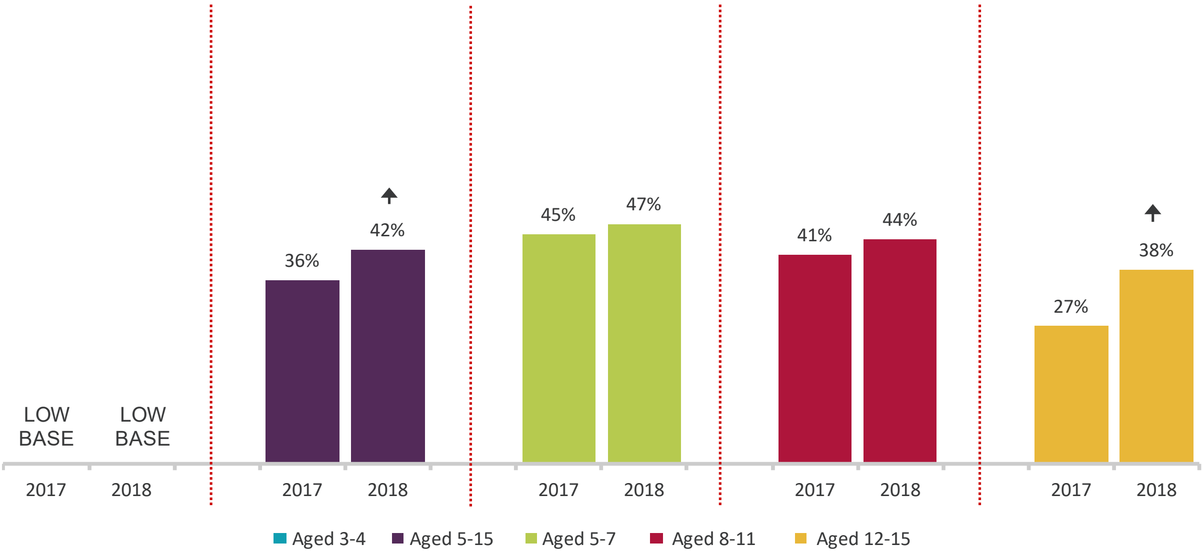
More than two in five parents of 5-15s have controls on the games console/ player on which their child plays games – an increase since 2017

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/ player.

As shown in Figure 146, more than two in five (42%) of parents of 5-15s[110] whose child plays games on either type of device have controls in place, and this incidence does not vary by age.

Compared to 2017, parents of 5-15s are more likely to use parental controls (42% vs 36%); this increase is attributable to parents of 12-15s (38% vs. 27%).

Figure 146: Use of parental controls on games consoles/ games players, by age: 2017, 2018



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)

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[110] Low base sizes prevent analysis among parents of 3-4 whose child plays games on a handheld or fixed gaming device

Base: Parents whose child ever plays games on a handheld games console or a games console connected to a TV (658 aged 5-15, 130 aged 5-7, 249 aged 8-11, 279 aged 12-15).

Significance testing shows any change between 2017 and 2018.

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Rules about playing games

More than four in five parents of 5-15s who play games have rules in place; an increase since last year

Most parents whose child plays games on a gaming device[111] say that they have rules or restrictions about the games their child plays. As in 2017, rules are more likely to be in place for 5-7s (90%) and 8-11s (91%) than for 12-15s (73%) and 3-4s (80%).

There is only one rule in place among a majority of parents of 3-4s: only play games with an appropriate age rating (68%). This same rule is the only one in place among a majority of parents of 5-7s (75%). There are four rules in place among a majority of parents of 8-11s: only play games with an appropriate rating (73%), limits on how much time is spent playing games (54%); only play games with appropriate content (53%) and rules on when they can play games (52%). 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 three rules in place: only play games with an age-appropriate rating, limits on how much time is spent playing games and rules on when they can play games.

Compared to 2017, there has been an increase in the use of rules for gaming among parents of 5-15s (84% vs. 79% in 2017) but this is not attributable to any particular age group. Parents of 3-4s (68% vs. 57%) and 8-11s (73% vs.66%) are now more likely to have the rule about only playing games with an appropriate age rating, while parents of 12-15s are more likely to have the rule about whom their child can play games with (34% vs. 25%).

Parents of boys aged 12-15 are more likely than parents of girls to have any rules about the games their child plays (78% vs. 65%). Limits on how much time is spent playing games are more likely among parents of boys aged 5-7 (55% vs. 41% for girls) and parents of boys aged 12-15 (44% vs. 33%).

Three rules are more likely to be in place among parents of 3-4s in ABC1 households: Rules about only playing games with appropriate content (50% vs. 33% in C2DE households), limits on how much time they spend playing (56% vs. 39%) and rules about when they can play games (49% vs. 31%).

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[111] This could be a fixed or portable games console/ computer or any other device.

Parents of 5-15s in AB households are more likely than average to have rules about purchasing or downloading games or apps or in-app purchasing (49% vs. 36%).

Figure 147: Parental rules for gaming, by age: 2018

All whose child plays games	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Rules about… Base	228	1012	277	368	367
Only playing games with an age appropriate rating	68% ↑	64% ↑	75%	73% ↑	48%
Only playing games with appropriate content (no violence/ nudity/ swearing etc.)	40%	48%	48%	53%	43%
How much time they spend playing games	46%	47%	49%	54%	39%
When they can play games	39%	44% ↑	47%	52%	35%
Who they can play games with	26%	37%	33%	43%	34% ↑
Purchasing or downloading games or apps / in-app purchasing	23%	36%	34%	38%	37%
Whether they can play games online	26%	31%	31%	35%	27%
TOTAL - ANY RULES ABOUT THE GAMES THEIR CHILD PLAYS	80%	84% ↑	90%	91%	73%

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 (228 aged 3-4, 1012 aged 5-15, 277 aged 5-7, 368 aged 8-11, 367 aged 12-15).

Technical controls on television services

This section looks at use of parental controls on the household television service. The questions are reported on at Figure 148 to Figure 154.

The questions focus initially on parental awareness and use of mandatory and voluntary PINs, as well as parents' opinions on their effectiveness. They also ask whether parents think that their child is aware of the PINs in use, and whether they (the parent) have removed adult channels from the TV service's on-screen menu of channels[112].

As the description of mandatory and voluntary PINs required explanation, parents were provided with a showcard which they were asked to read before answering these questions. The showcard included the following information:

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.

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 films on a pay-per-view or premium subscription film service like Sky Cinema
   - access adult content (sex) on a premium subscription service or a pay-per-view service
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 programmes
   - restrict access to content that has been recorded that was originally broadcast after 9pm.

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[112] Ofcom published more detailed research on the use of PINs earlier in 2018. For more information see https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/tv-research/daytime-pin-research.

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 148 and are comparable for parents of 3-4s and 5-15s. Around three in five parents say their TV service provider uses mandatory PINs, while three in ten say their provider does not; around one in ten are unsure.

There is some variation in response by the main type of TV service in use at home[113]. Two-thirds of parents of children aged 5-15 whose main TV service is satellite (68%) or cable (67%) say their provider uses mandatory PINs to restrict access to unsuitable content. More than half (56%) of those whose main TV service is hybrid IPTV[114] say that mandatory PINs are in use; this falls to two in five (39%) whose main TV service is Freeview.

Parents of 5-15s in AB households are more likely than average to say their TV service uses mandatory PINs (67% vs. 60%).

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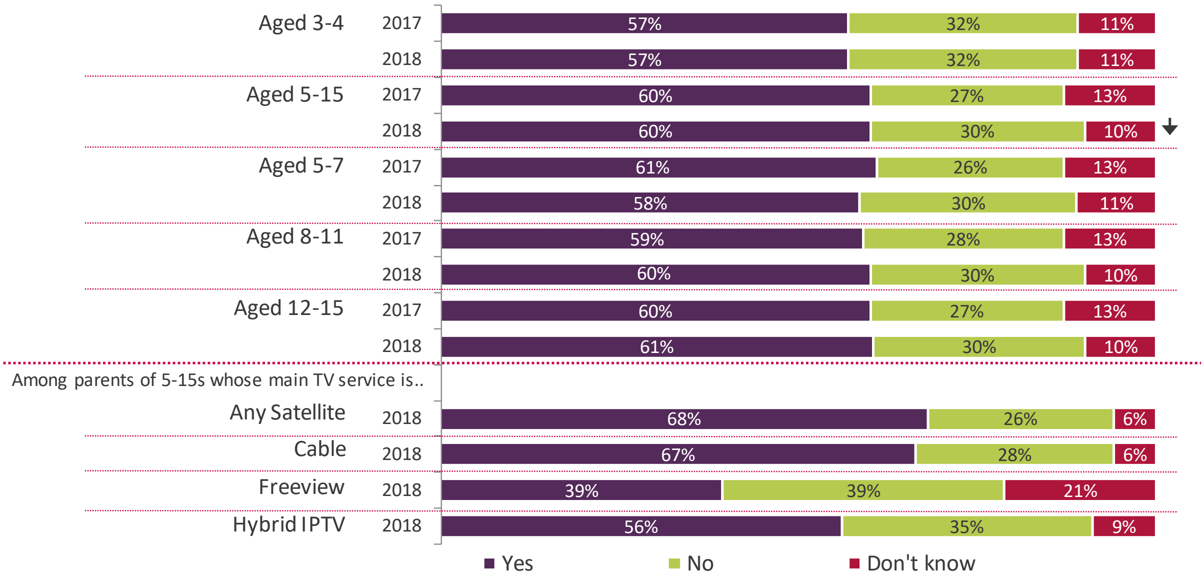
[113] In 2018, among parents of 5-15s with a TV service in the household, 50% say their main service at home is satellite, 27% say it is Freeview, 12% say it is cable and 7% say it is hybrid IPTV. The remaining 4% either nominate Now TV or are unsure.

[114] Hybrid IPTV services refer to television services that provide the bulk of their channels via the DTT platform and offer additional channels and functionality through a broadband connection (such as access to online video services and programme recordings). For this study, the providers included in this category are BT TV, TalkTalk TV, EE TV and YouView.

Figure 148: Awareness of whether mandatory PINs are in use on household TV service(s) among parents of 3-15s: 2017, 2018



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 INTERVIEWIER 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)

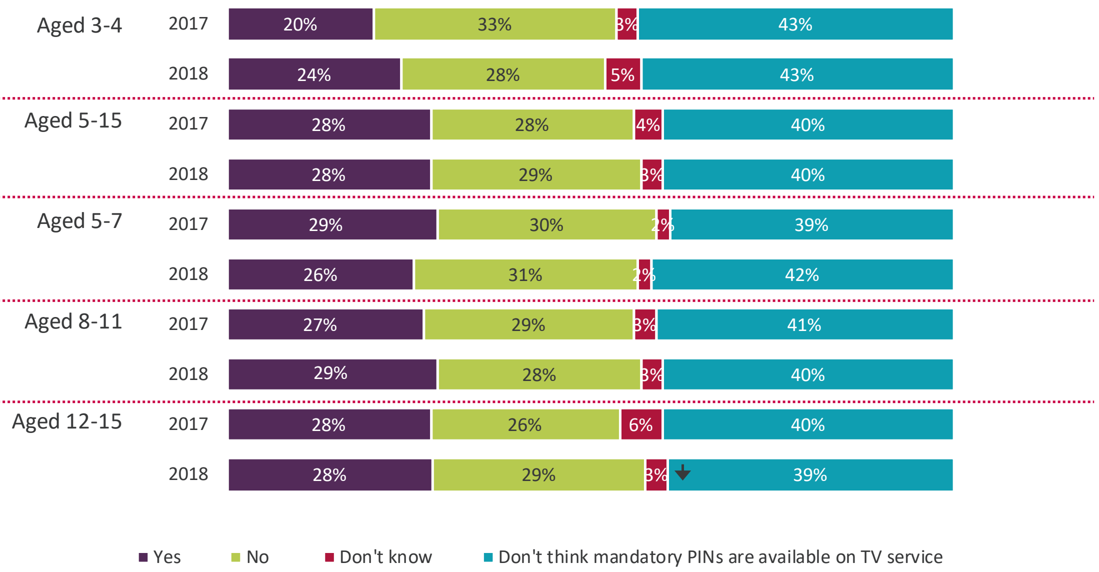
Base: Parents of children with a TV set in the household (621 aged 3-4, 1409 aged 5-15, 444 aged 5-7, 484 aged 8-11, 481 aged 12-15). Significance testing shows any change between 2017 and 2018).

A quarter of 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 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 149 shows the results expressed as a proportion of those with a TV set in the household. A quarter of parents of 3-4s (24%) say their child's TV viewing has ever been blocked by a mandatory PIN. Parents of 5-15s are as likely to say this (28%), and this incidence does not vary by age.

Figure 149: Incidence of child's viewing ever being blocked by a mandatory PIN: 2017, 2018



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 (621 aged 3-4, 1409 aged 5-15, 444 aged 5-7, 484 aged 8-11, 481 aged 12-15). Significance testing shows any change between 2017 and 2018.

Two-thirds of parents of 5-15s who are aware that their TV service uses mandatory PINs consider these PINs effective

Parents who are aware that their TV service provider uses mandatory PINs[115] were 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".

More than three in five parents of 3-4s (64%) and two-thirds of parents of 5-15s agree that the mandatory PINs are effective. Parents of 8-11s are more likely to agree than parents of 12-15s (71% vs.61%).

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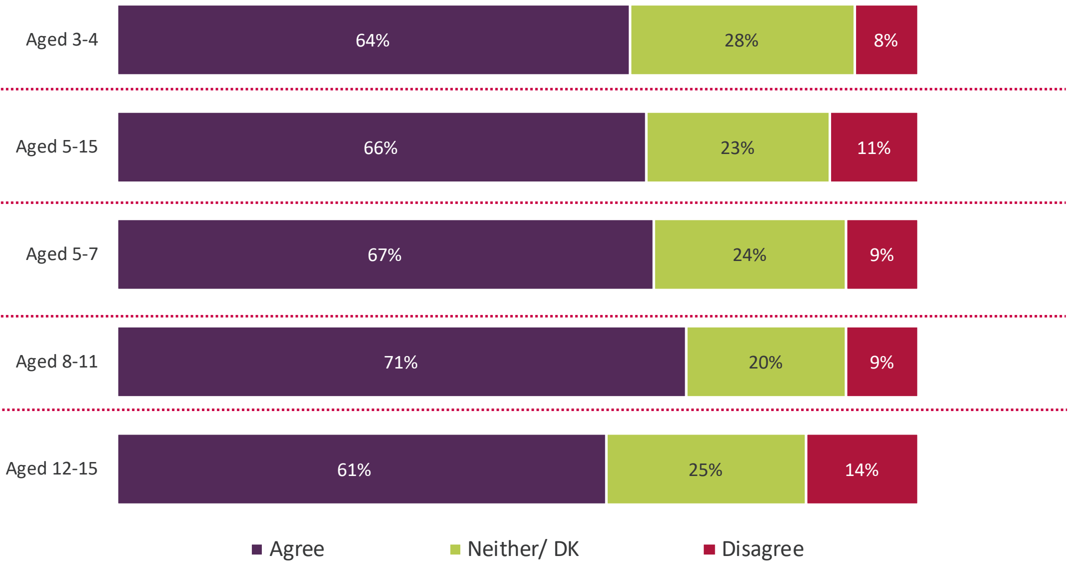
[115] It is not possible to show a trend for this measure as in 2017 this question was asked of those parents whose child's viewing had ever been blocked by a mandatory PIN, so the results cannot be compared.

Figure 150: Parental agreement with “the mandatory PINs in place on my TV service(s) are effective in managing my child’s TV viewing”, by age: 2018



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 who are aware that their TV service provider uses mandatory PINs (348 aged 3-4, 829 aged 5-15, 256 aged 5-7, 285 aged 8-11, 288 aged 12-15). * NB – in 2017 this question was asked of those parents whose child’s viewing had been blocked by a mandatory PIN. It is therefore not possible to show the data for 2017*

Voluntary PINs are used by one third of parents of 3-4s and two in five parents of 5-15s

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.

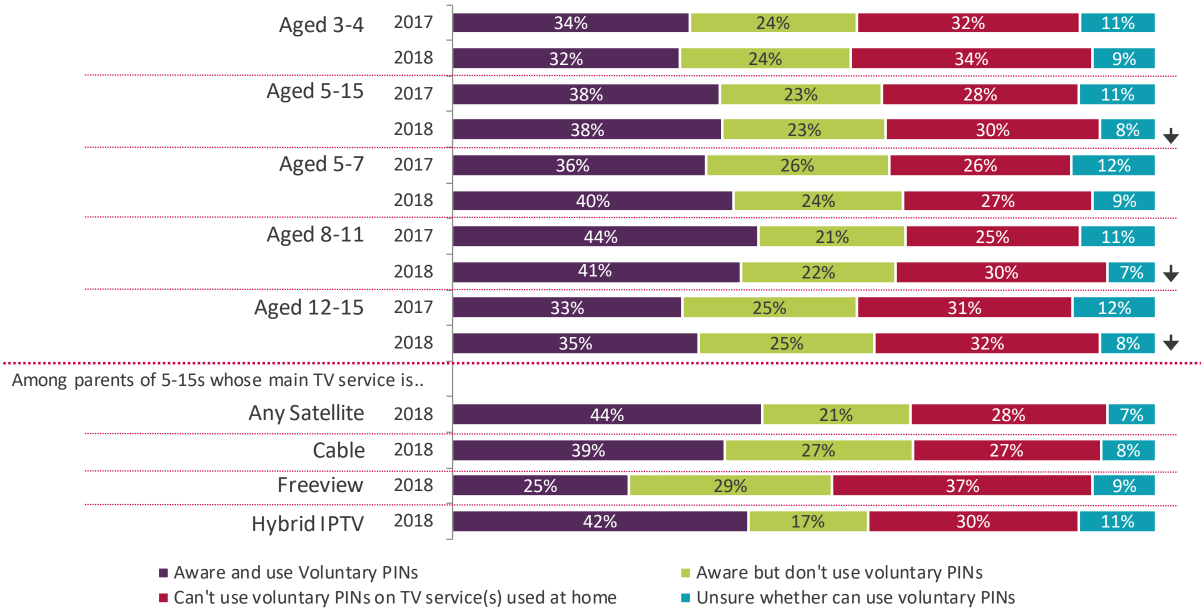
The results are shown in Figure 151, expressed as a proportion of all parents with a TV set in the household.

More than half of parents of 3-4s (56%) and 5-15s (62%) 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.

A third of parents of 3-4s (32%) say they use voluntary PINs, as do 38% of parents of 5-15s (38%). Use also does not vary by age among 5-15s. In 2018, parents of 5-15s in AB households are more likely to use voluntary PINs (45% vs.38%). Parents of 3-4s in C2DE households are more likely than those in ABC1 households to be unsure whether they can use voluntary PINs on their TV services (12% vs.7%).

Results also differ by the type of TV service used at home. Parents of 5-15s whose main TV service at home is satellite (64%) or cable (65%) are more likely than those whose main service is Freeview (53%) to say it is possible to set up voluntary PINs, and they are more likely to use them (44% for satellite, 39% for cable vs. 25% for Freeview). Parents of 5-15s whose main TV service is hybrid IPTV are also more likely to use voluntary PINs than those whose main service is Freeview (42% vs 25%).

Figure 151: Use of voluntary PINs on TV service(s) used at home, by age: 2017,2018



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 (621 aged 3-4, 1409 aged 5-15, 444 aged 5-7, 484 aged 8-11, 481 aged 12-15). Significance testing shows any change between 2017 and 2018.

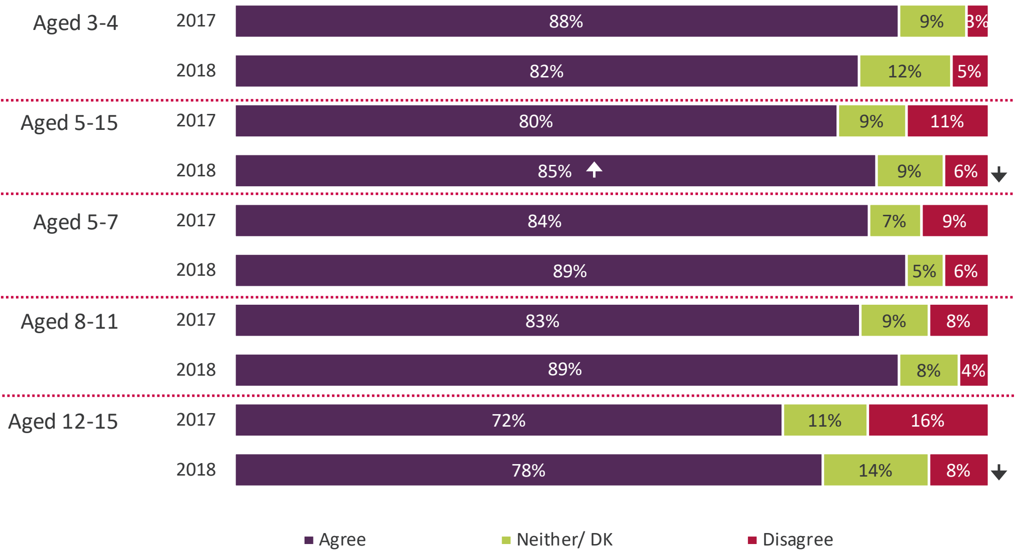
Compared to last year, parents of 5-15s are more likely to say that the voluntary PINs they use are effective in managing their child's TV viewing

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 (82%) and 5-15s (85%) agree that the voluntary PINs are effective. Among parents of 5-15s overall, agreement is higher among parents of 5-7s and 8-11s (both 89%) than among parents of 12-15s (78%).

Compared to last year, parents of 5-15s are more likely to agree that the voluntary PINs are effective (85% vs. 80%), although this increase is not attributable to any particular age group. Parents of 12-15s are, however, less likely to disagree compared to 2017 (8% vs.16%).

Figure 152: 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, 2018



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).

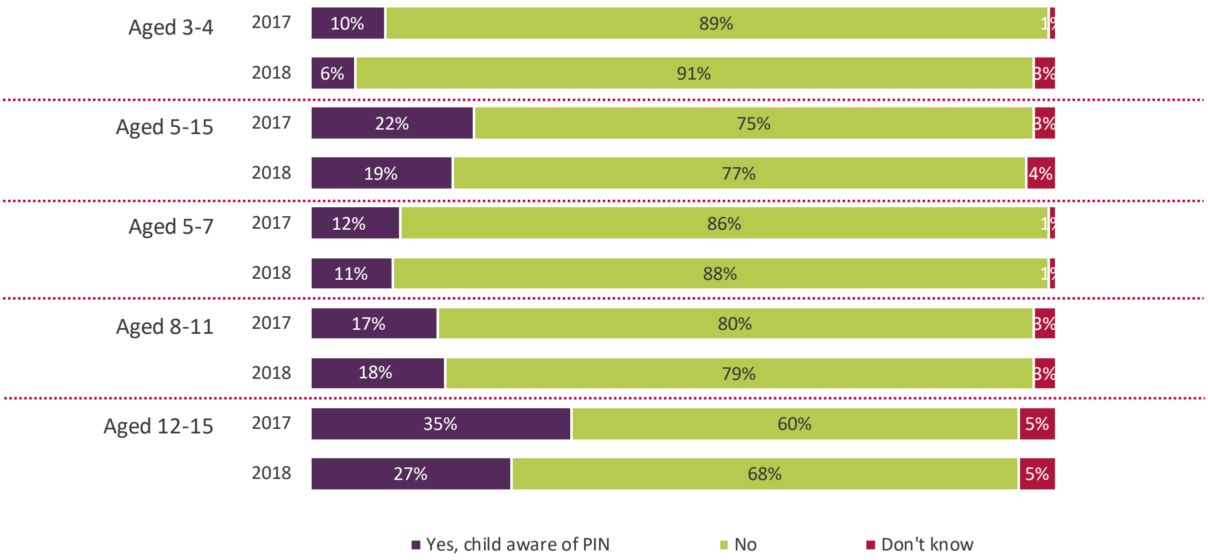
Base: Parents who use voluntary PINs (197 aged 3-4, 538 aged 5-15, 174 aged 5-7, 194 aged 8-11, 170 aged 12-15). Significance testing shows any change between 2017 and 2018.

One in five parents of 5-15s 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 153, 6% of parents of 3-4s and 19% of parents of 5-15s say that their child knows the PIN. Among parents of 5-15s, this incidence increases with the age of the child, accounting for one in ten 5-7s (11%), close to two in ten 8-11s (18%) and more than a quarter of 12-15s (27%).

Figure 153: Child's awareness of PINs used on TV services, by age: 2017, 2018



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) (261 aged 3-4,670 aged 5-15, 206 aged 5-7, 242 aged 8-11, 222 aged 12-15).

Compared to last year, parents are more likely to think it is not possible to remove adult channels from their EPG

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 (the Electronic Programme Guide or EPG), 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 154.

Three in ten parents of 3-4s say they can remove adult channels from their TV services; less than the 35% of parents of 5-15s who say this.

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 (18%) and 5-15s (21%) say they have done this. So approximately three in five of those parents who are aware that channels can be 'hidden' have done this, as in 2017.

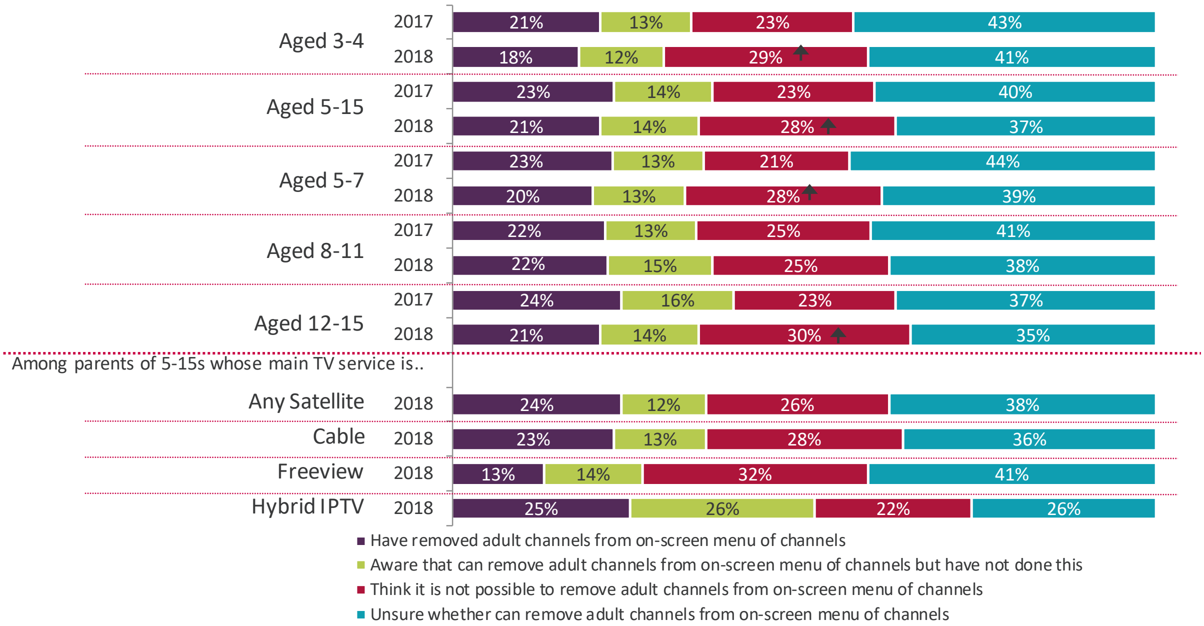
Compared to last year, however, parents of 3-4s (29% vs. 23%) and 5-15s (28% vs. 23%) are more likely to say that it is not possible to remove adult channels from their EPG. This increase among parents of 5-15s overall is driven by more parents of 5-7s (28% vs. 21%) and parents of 12-15s (30% vs. 23%) saying this in 2018.

Parents of boys aged 5-7 are more likely than parents of girls to be aware that it is possible to remove adult TV channels from their EPG (37% vs. 27%) and are more likely to have done this (25% vs. 14%). Parents of boys aged 12-15 are more likely than parents of girls to say that it is not possible to remove these channels (34% vs. 25%) while parents of girls aged 12-15 are more likely to be unsure (40% vs.31%).

Compared to the average among parents of 5-15s (21%), parents in AB households are more likely to have removed adult channels from the EPG (27%).

Parents of 5-15s whose main TV service is hybrid IPTV (49%) are more likely than those whose main TV service is satellite (36%), cable (36%) or Freeview (25%) to say that they can remove adult channels and to have removed them (25% for hybrid IPTV, 24% for satellite, 23% for cable vs. 13% for Freeview).

Figure 154: Removal of adult channels from the EPG, by age of child: 2017, 2018



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 (621 aged 3-4, 1409 aged 5-15, 444 aged 5-7, 484 aged 8-11, 481 aged 12-15).

Significance testing shows any change between 2017 and 2018.

Awareness and use of PIN controls on catch-up services

Close to half of parents of 3-4s and most parents of 5-15s have set up a PIN or password on broadcaster catch-up services

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, 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”.

Parents were then asked whether they were aware of these content ratings and guidance labels. The results are shown in Figure 155. More than three-quarters of parents of 3-4s (78%) 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 83% and this incidence does not vary by age among 5-15s.

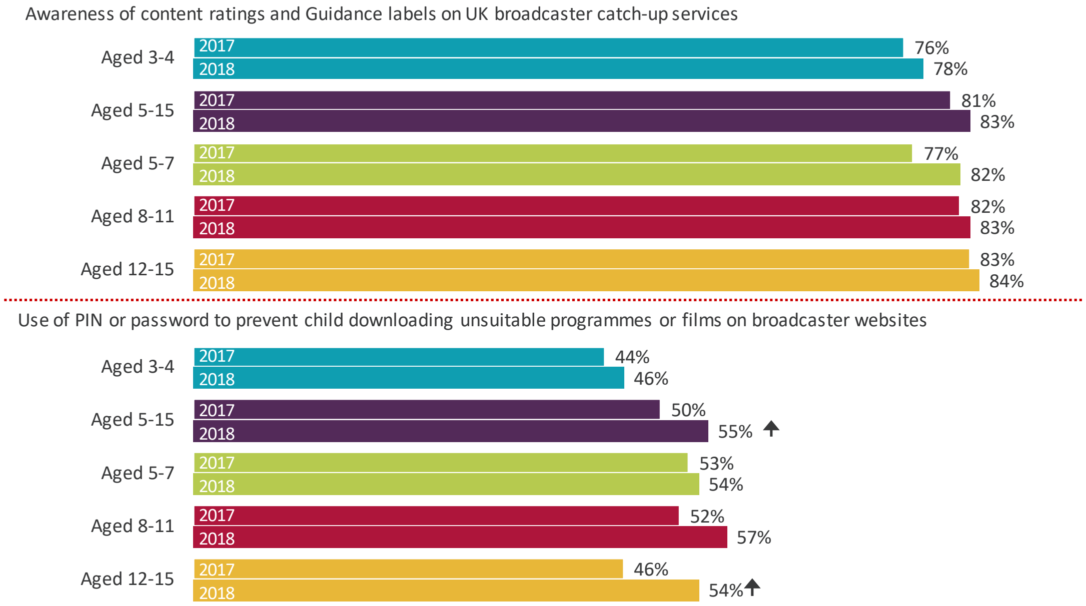
Parents of 3-4s and 5-15s were also asked whether they had set up a PIN code or password on any of these catch-up services to prevent their child watching or downloading unsuitable programmes or films; these results are also shown in Figure 155. Close to half of parents of 3-4s have set up a PIN/ password (46%); this is less likely than among parents of 5-15s (55%). Use of PINs/ passwords among parents of 5-15s does not vary by age.

Compared to last year, parents of 5-15s are more likely to use PINs/ passwords on broadcasters’ websites (55% vs. 50%) with this increase attributable to parents of 12-15s (54% vs.46%).

Among parents of 5-15s, compared to the average (55%), parents in AB households are more likely to use PINs/ passwords on broadcasters’ websites (62%) and parents in DE households are less likely (47%).

In 2018, parents of 3-4s in ABC1 households are more likely to be aware of content ratings and guidance label in use on broadcaster catch-up services, compared to those in C2DE households (82% vs.74%) and are also more likely to use PINs/ passwords on broadcaster services (50% vs.47%).

Figure 155: 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: 2017, 2018



QP9 - 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)/ QP10 - 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 (630 aged 3-4, 1430 aged 5-15, 448 aged 5-7, 497 aged 8-11, 485 aged 12-15) . Significance testing shows any change between 2017 and 2018.

Rules about television viewing

A majority of parents of 3-4s, 5-7s and 8-11s 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 (81%), with a majority saying they have rules about what the child watches (66%). Half these parents (50%) say they have rules about how much time they spend watching or about when they watch (48%) with fewer saying they have rules about whom they are watching with, or only watching when supervised (33%).

Household rules for television viewing are more likely to be in place for 5-7s (89%) and 8-11s (88%) than for 12-15s (73%). This is also true for each of the four individual rules shown in Figure 156.

There are three rules in place among a majority of parents of 5-7s and 8-11s, but only one among a majority of parents of 12-15s, which relates to rules about what the children watch (59% for 12-15s).

There has been no change in these responses since 2017 for any age group of children.

Parents of 3-4s in ABC1 households are no more likely than those in C2DE households to have rules (80% vs. 81%), but they are more likely to have three particular rules: about how much time their child spends watching (56% vs. 45%), when they watch (53% vs.44%) and rules about who they are watching with/ can only watch when supervised (38% vs.27%).

Figure 156: Parental rules for television, by age: 2018

All whose child watches television	Aged 3-4	Aged 5-15	Aged 5-7	Aged 8-11	Aged 12-15
Rules about... Base	616	1411	441	492	478
What they watch	66%	71%	76%	78%	59%
When they watch	48%	55%	57%	62%	46%
How much time they spend watching	50%	54%	58%	59%	46%
Who they are watching with/ can only watch when supervised	33%	29%	33%	32%	21%
TOTAL - ANY RULES ABOUT THE TV/ DVDs THEIR CHILD WATCHES	81%	83%	89%	88%	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 (616 aged 3-4, 1411 aged 5-15, 441 aged 5-7, 492 aged 8-11, 478 aged 12-15).

A12. 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

Children aged 4-15 watched an average of just over 10 hours of broadcast television per week in 2017, down by just under two hours per week in 2016 (Figure 1). The decline is a continuation of longer-term annual falls in weekly viewing: a larger decline in 2017 than in 2016 (just over an hour) and 2015, when viewing fell by 45 minutes.

Younger children watch more TV than older children. In 2017, children aged 4-9 watched an average of 11 hours per week compared to just over 9 hours per week among children aged 10-15.

The decline in weekly viewing among all children has been steep since 2012. The drop has been driven mainly by the 10-15 age group, who watched 7 and a half hours less per week on average in 2017 than in 2012. Viewing fell by nearly 6 hours 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, ITV, 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 of PSB channels and their portfolio channels (i.e. the proportion of children’s viewing of those channels out of all channels) has been fairly consistent in recent years. Between 2012 and 2017, the main five PSB channels represented around 30% of viewing, *and the PSB families combined represented around 56% of viewing (Figure 2).*

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 (excluding their +1 channels) in a week (‘average weekly reach’), has declined. Between 2016 and 2017 average weekly reach decreased by nearly 6 percentage points (pp) to 59%. This is a larger decrease than the previous year (-1 pp), and compared to the total TV decline for all children (-4 pp). This decrease in average weekly reach came from both older and younger children.

Of all channels, BBC One had the largest reach, followed by ITV. BBC One had an average weekly reach of 38% in 2017 (35% among 4-9s and 42% among 10-15s). ITV's main channel (excluding the +1) had an average weekly reach of 30% (28% among 4-9s and 33% among 10-15s).

Live broadcasting vs. time-shifting

Figure 3 shows that most of the time spent viewing TV among children aged 4-15 in 2017 was of programmes at the time of broadcast (82%). This was a slight decline of one percentage point (pp) since 2016 and a 7pp fall since 2012. Yet despite over three-quarters of the child population having access to a digital video recorder in the home (78% in 2017 vs. 72% in 2012), viewing of recordings or catch-up services (time-shifted viewing) accounted for only 18% of total TV viewing time among all children aged 4-15. Access to digital video recorders has been falling by 1pp per year since 2015, although viewing of recordings or catch-up services (time-shifted viewing) has grown by 3pp over this period.

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 8 and 28 days after the initial broadcast. Another is unmatched viewing[116], which refers to activities when the TV set is in use but the content cannot be matched to broadcast TV programmes or films (this can include subscription VoD like Netflix, apps on smart TVs, DVDs and gaming). Both these measures were introduced in July 2013.

For children, unmatched viewing on the TV set increased in 2017, but up to 7-day time-shifted and live viewing declined. On average, per week, children's live viewing decreased by 1 hour 39 minutes from 2016 to 2017, while 8-28-day time-shifted viewing and unmatched viewing together increased by just over an hour (1 hour 14 minutes), with the majority of this increase coming from unmatched viewing (Figure 4). This 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 5). The largest number of child viewers in 2017 was

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[116] 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.

concentrated in family viewing time, between 6pm and 9pm, peaking at over 1.1 million between 7pm and 8pm.

The audience for younger children (aged 4-9) peaks slightly earlier. In 2017 the biggest volume of viewers in this age group was between 6pm and 7pm, at just under 700,000. 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, at over 550,000 viewers.

In terms of post-watershed viewing, a significant volume of children continued to watch live TV in the first hour after the watershed. More than 750,000 child viewers aged 4-15 watched TV between 9pm and 10pm in 2017. Our analysis of the children's top 20 most popular programmes originally broadcast after 9pm, based on consolidated viewing117, (Figure 14) in 2017, shows that four of these were among the most popular titles for children overall.

Post-9pm broadcasts of programmes that are usually watched during family viewing time such as *EastEnders, Britain's Got Talent*, and *I'm a Celebrity...Get Me Out Of Here!* featured in the list, 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 5, which shows that the child audience watching live fell sharply at 10pm and continued to fall each hour into the early morning.

In 2017, in the run-up to the watershed, a higher proportion of the child audience is aged 4-9 (62%) than 10-15 (38%). This is reversed between 9pm and midnight, with a higher proportion of older viewers (63%) than younger viewers (37%).

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 6). Overall, three-quarters of children's viewing was spent watching commercial channels (both children's and adults', including the commercial PSBs118). This proportion of viewing in commercial airtime has remained relatively consistent over the past six years (from 74% in 2012 to 75% in 2017) with a shift towards an increased proportion of weekly viewing to the commercial multi-channels, and a gradual decrease in children's viewing of the main commercial PSB channels. The proportion of time spent viewing BBC One and BBC Two combined remained fairly stable from 2012 (14%) to 2017 (13%). The remaining 12% in 2017 was to the BBC portfolio channels.

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[117] Consolidated viewing includes live and time-shifted viewing within seven days of the original broadcast, through the TV set.

[118] ITV, Channel 4 and Channel 5, including their HD variants where applicable.

Sixty-three per cent of 4-15s' total viewing took place in adult airtime[119] (Figure 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 (51%) of 4-9 year-olds' viewing time.

The remaining 37% of children's total viewing that took place in children's airtime[120] was mostly attributed to commercial airtime[121] (25%) while 12% was spent in non-commercial children's airtime. Children aged 4-9 spent a higher proportion than 10-15 year-olds of their total weekly viewing in children's airtime (49% vs. 21% of their viewing time).

Drilling down further into total viewing just in children's airtime, Figure 7 shows that the majority (69%) of this viewing among children aged 4-15 was to commercial children's airtime, declining from 72% in 2016. By channel, most viewing time was spent on dedicated commercial children's channels (64%). The proportion of viewing time to children's programming slots on the main commercial PSB channels (ITV, Channel 4 and Channel 5) has grown slightly since 2016 (2 pp higher). BBC One and BBC Two did not have dedicated children's programme slots between 2013 and 2017, and this is reflected in Figure 7. Children's viewing to the BBC's dedicated children's channels, CBBC and CBeebies, has increased by 3pp since 2012, to 31%.

With whom are children watching?

When watching TV at the time of broadcast, 25% of children watched alone. Figure 9 shows that this varied slightly between 10-15 year-olds (28%) and 4-9 year-olds (23%).

Across the day, children watched TV with other people (children and/or adults) most between 7pm and midnight. Between 81% and 83% of viewing by children was with other people during this time. The proportion of children watching alone was highest (43%) early in the morning, between 6am and 7am.

Top programmes among children

Figure 11 looks at the top-performing programmes among all children in 2017. Twelve of the 20 most-watched programmes by children aged 4-15 were on BBC One, with one on Channel 4 and Sky Cinema and the remainder on ITV. Virtually all the programmes were in peak family viewing time. *Britain's Got Talent* was the most popular programme overall, with 1.5 million children watching.

There was one children's-genre film in the top 20, *The Highway Rat* on BBC One, which achieved 1.4 million viewers on average. Younger children, aged 4-9, watched a higher proportion of films than did all children (eight of the top 20). *The Highway Rat* moved to the top position for younger children in this list (Figure 12).

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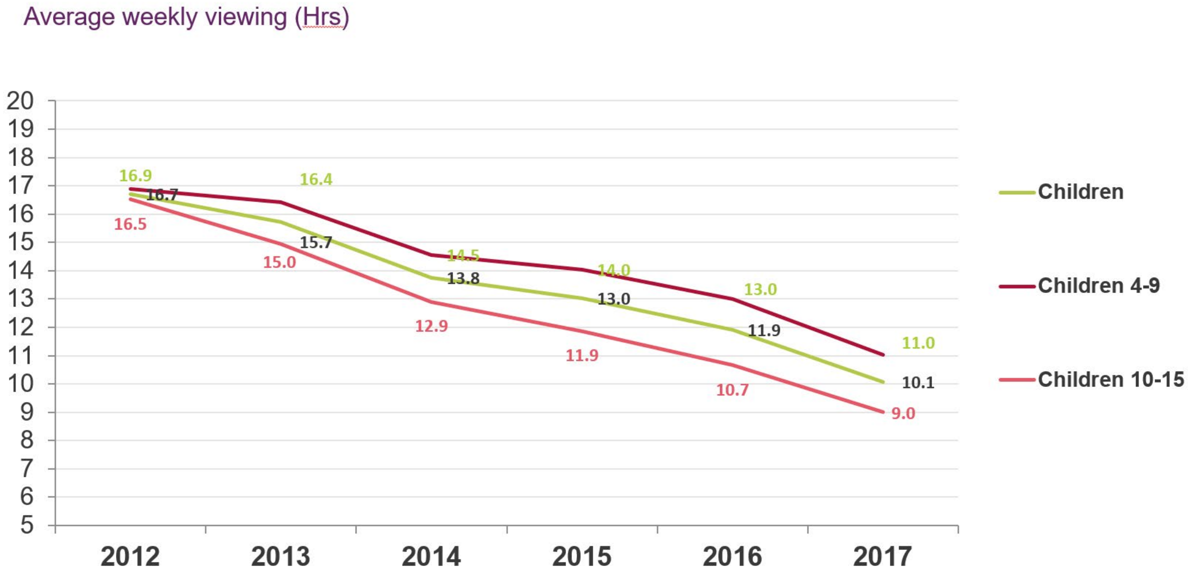
[119] This comprises the main five PSB channels and ITV, Channel 4 and Channel 5 +1 channel services, excluding the slots when children's programmes are shown, combined with all other multichannels except for the dedicated children's channels.

[120] 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.

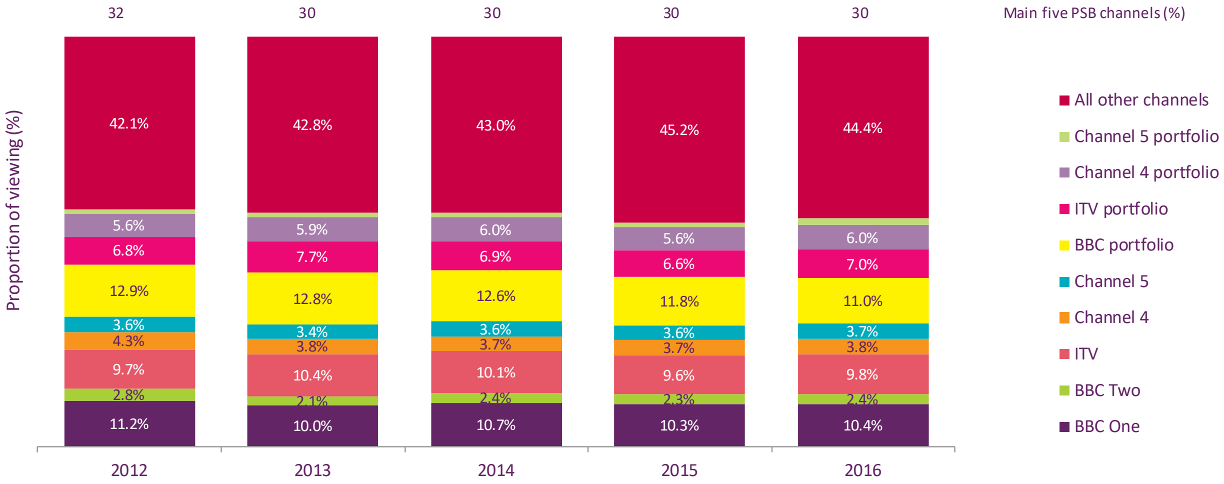
[121] This comprises children's programme slots on the commercial PSB channels that have them (ITV and Channel 5) and the equivalent slots on ITV +1 and Channel 5 +1, as well as the dedicated commercial multi-channel children's channels.

Figure 157: Average hours of weekly viewing, by age



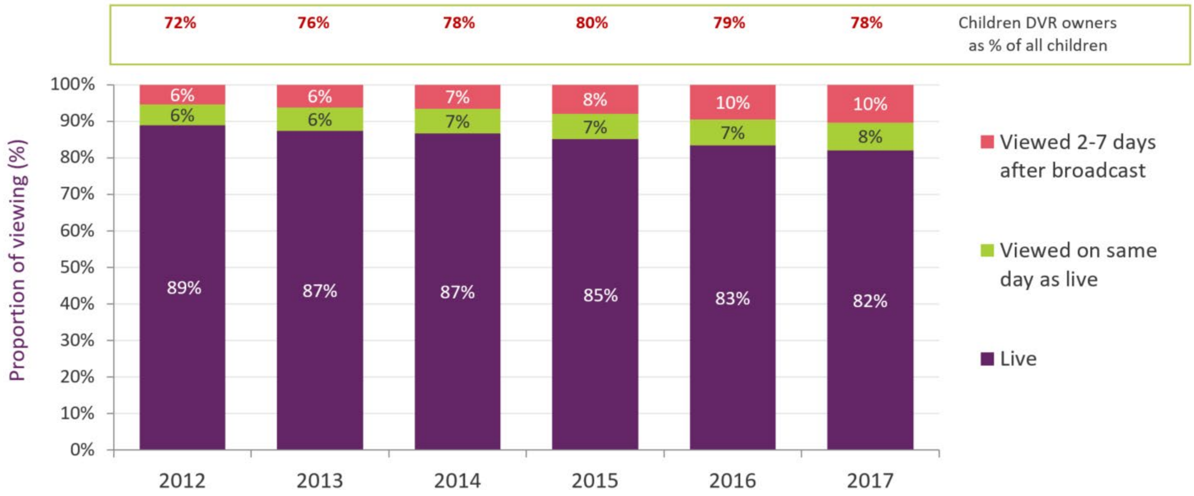
Source: BARB. Total TV, network, consolidated.

Figure 158: Channel share of viewing by children



Source: BARB. All children 4-15, network, consolidated.

Figure 159: Live versus time-shifted TV viewing by children

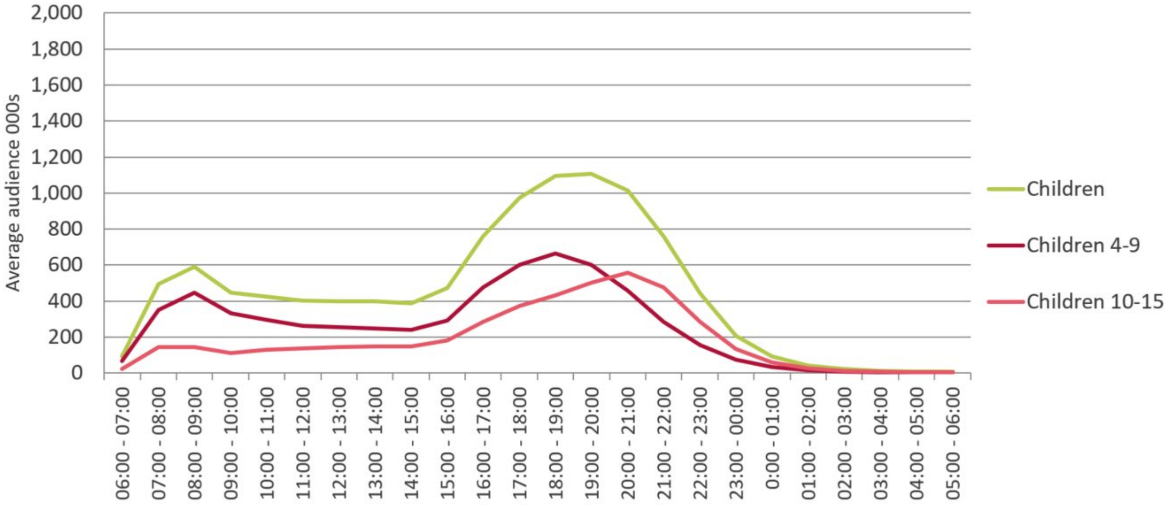


Source: BARB. All children 4-15, total TV, network, consolidated. Based on total minutes per child each year. Values may not sum up to 100% due to rounding.

Figure 160: Average weekly minutes of children's total TV screen time

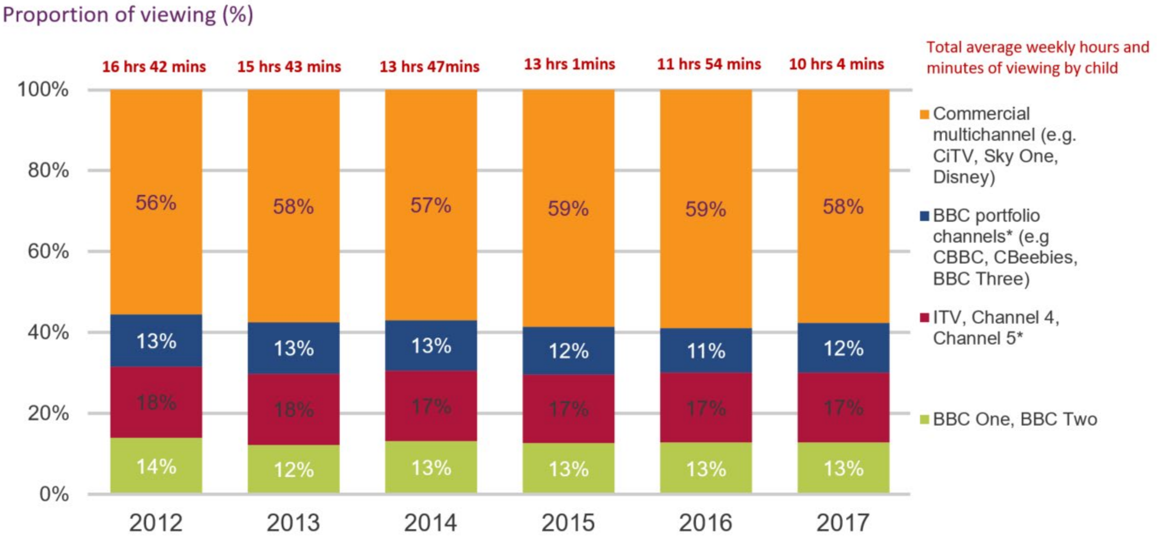
Source: BARB. All children 4-15, total TV, network. Average minutes of viewing per week, per child.
**Note: Unmatched viewing = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing to DVDs/box sets/archives, SVoD, time-shifted viewing beyond 28 days, apps on 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 161: Average 2017 audience, by day part and age: total TV



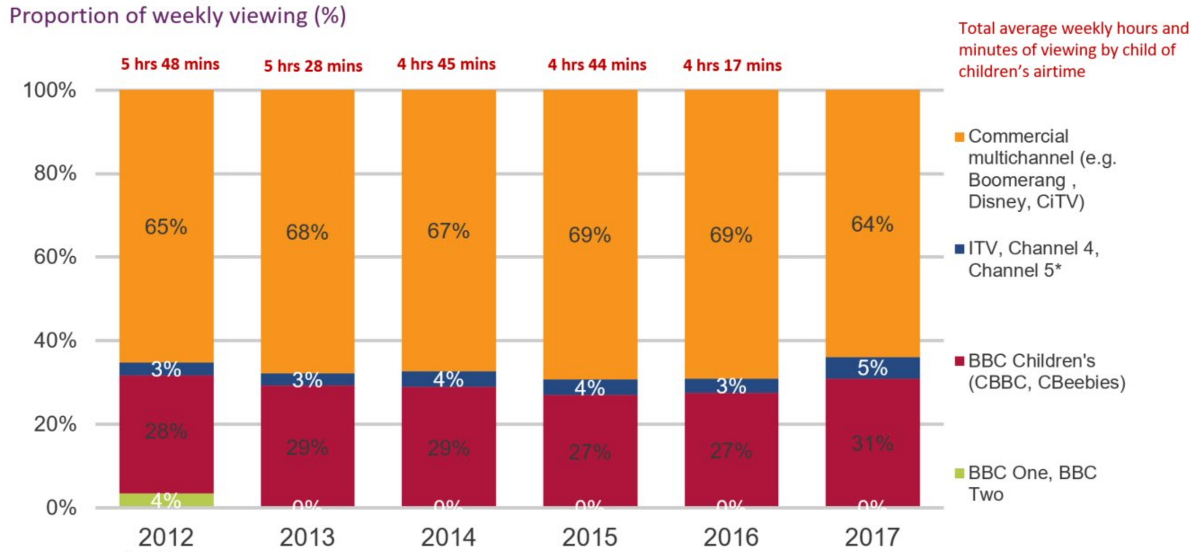
Source: BARB, 2017. Live viewing only, total TV, network.

Figure 162: Children's total weekly viewing, by channel type



Source: BARB. All children 4-15, consolidated, network.
**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 163: Children's weekly viewing of children's airtime, by channel type



Source: BARB. All children 4-15, consolidated, network.

**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 164: Demographic differences

Weekly Viewing Summary	Children	4-9	10-15
Total hours of viewing	10.1	9.6	7.8
Total hours of viewing in comm. airtime	7.6	7.0	6.0
Total hours of viewing in adult airtime	6.4	4.9	6.2
Total hours of viewing in comm. adult airtime	5.0	3.9	4.8
Total hours of viewing in children's airtime	3.7	4.6	1.6
Total hours of viewing in comm. children's air.	2.5	3.2	1.2
% total time spent in commercial airtime	75%	74%	77%
% total time spent in adult airtime	63%	51%	79%
% total time spent in comm. adult air.	50%	41%	62%
% total time spent in children's airtime	37%	49%	21%
% total time spent in comm. children's airtime.	25%	33%	15%

Source: BARB 2017. Consolidated, network.

***Commercial airtime** consists of commercial PSB channels (ITV, Channel 4 and Channel 5), including HD variants and +1 channels, and commercial multichannels.*

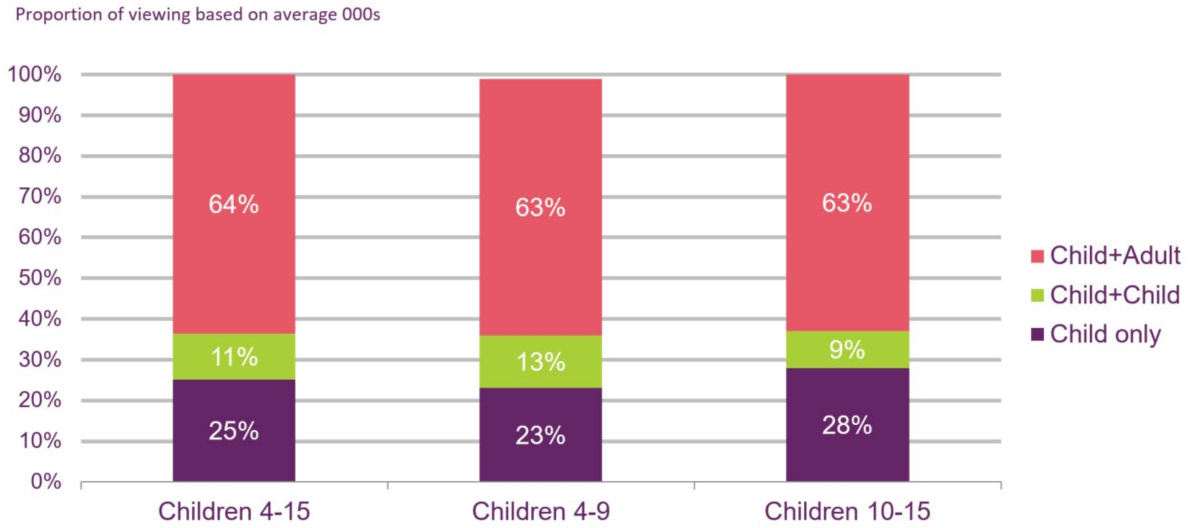
***Adult airtime** consists of the main five PSB channels (including HD) and ITV, Channel 4 and Channel 5 +1 channels, excluding the slots when children's programmes are shown, combined with all other multichannels except for the dedicated children's channels.*

***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 multichannels 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 children's multichannels.*

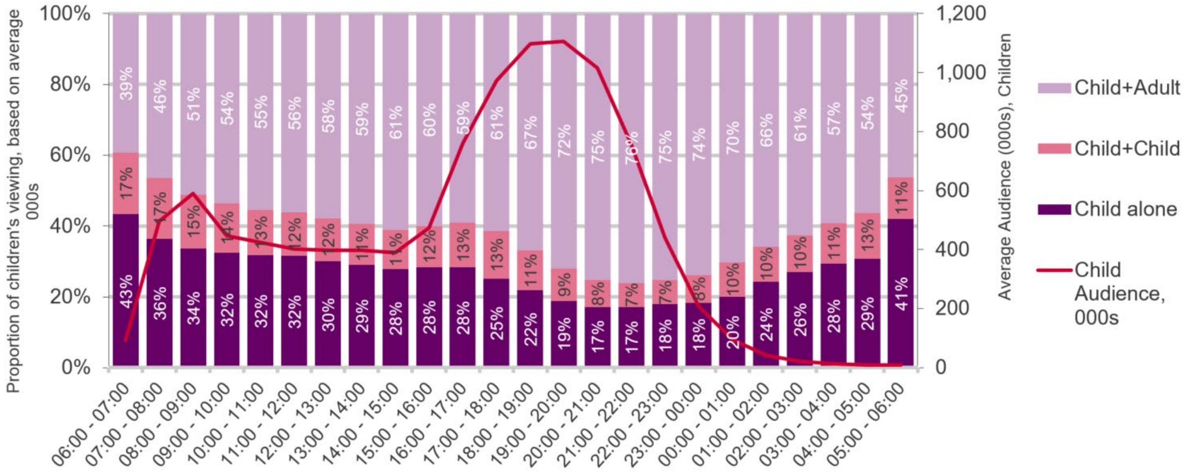
***Commercial children's airtime** consists of children's programme slots on the commercial PSB channels (ITV, Channel 4 and Channel 5) and the equivalent slots on ITV +1, Channel 4 +1 and Channel 5 +1, as well as the dedicated commercial children's multichannels.*

Figure 165: Co-viewing across total TV



*Source: BARB 2017. All children 4-15, total TV, network. Based on live viewing at the time of broadcast. Values may not sum up to 100% due to rounding. *The children + adults group excludes those were other children were also present as well as at least one adult as those are included in the children + children figures.*

Figure 166: Co-viewing across the day: all TV viewing



*Source: BARB 2017. All children 4-15, total TV, network. Based on live viewing at the time of broadcast. Values may not sum up to 100% due to rounding. * The Child+ child group excludes any viewing when adults are present as these are included in Child+adult.*

Figure 167: Top 20 programmes in 2017 among all children aged 4-15

	Title	Channel	BARB Genre	Date	Start time	End time	Duration	000s	Rating (%)	Share (%)
1	Britain's Got Talent (Series 11)	ITV	Entertainment	06/05/2017	20:02:00	21:15:45	73	1459	16.2	68.4
2	The Highway Rat	BBC One	Children's	25/12/2017	16:48:38	17:13:46	25	1369	14.9	46.3
3	New Year's Eve Fireworks	BBC One	Entertainment	31/12/2017	23:59:19	24:13:42	14	1351	14.7	69.6
4	Ant & Dec's Saturday Night Takeaway	ITV	Entertainment	25/02/2017	19:01:00	20:29:09	88	1168	13.0	54.6
5	Strictly Come Dancing	BBC One	Entertainment	28/10/2017	18:38:30	20:18:42	100	1114	12.2	54.9
6	I'm A Celebrity - Get Me Out Of Here!	ITV	Entertainment	19/11/2017	21:02:30	22:45:59	103	1026	11.2	69.0
7	Blue Planet II	BBC One	Documentaries	05/11/2017	20:01:37	20:59:56	58	1010	11.0	47.1
8	One Love Manchester	BBC One	Music	04/06/2017	18:55:00	22:09:48	194	984	10.9	59.3
9	Film: Moana (2016)	Sky Cinema	Film	29/07/2017	10:32:18	12:15:03	102	929	10.3	54.7
10	The Voice UK	ITV	Entertainment	11/02/2017	20:02:28	21:15:54	73	918	10.2	49.7
11	Doctor Who	BBC One	Drama	25/12/2017	17:28:48	18:28:38	59	875	9.5	34.0
12	The Great British Bake Off	CH4	Entertainment	29/08/2017	19:59:00	21:13:36	74	873	9.7	49.5
13	Strictly Come Dancing Launch Show	BBC One	Entertainment	09/09/2017	19:01:04	20:38:27	97	821	9.1	45.7
14	Children In Need	BBC One	Entertainment	17/11/2017	19:22:16	21:59:23	157	803	8.7	49.0
15	The X Factor	ITV	Entertainment	16/09/2017	20:02:00	21:14:23	72	785	8.7	49.5
16	Strictly Come Dancing Christmas Special	BBC One	Entertainment	25/12/2017	18:29:53	19:42:05	72	771	8.4	31.7
17	Ninja Warrior	ITV	Entertainment	07/01/2017	18:59:36	19:57:39	58	767	8.5	33.4
18	Eastenders	BBC One	Soaps	25/12/2017	21:03:00	22:03:23	60	753	8.2	38.6
19	Red Nose Day	BBC One	Entertainment	24/03/2017	18:59:05	21:59:03	179	732	8.1	46.1
20	Strictly Come Dancing: The Results	BBC One	Entertainment	05/11/2017	19:17:56	20:00:16	42	720	7.9	39.8

Source: BARB 2017. Consolidated, network. Based on the best-performing programme episode (000s). All channels include viewing to HD variants and +1s.

Figure 168: Top 20 programmes in 2017 among all children aged 4-9

	Title	Channel	BARB Genre	Date	Start time	End time	Duration	000s	Rating (%)	Share (%)
1	The Highway Rat	BBC One	Children's	25/12/2017	16:48:38	17:13:46	25	1,085	22.1	55.1
2	Film: Moana (2016)	Sky Cinema	Film	29/07/2017	10:32:18	12:15:03	102	739	15.4	59.0
3	Britain's Got Talent (Series 11)	ITV	Entertainment	20/05/2017	20:02:08	21:17:55	75	672	14.1	67.4
4	Strictly Come Dancing	BBC One	Entertainment	28/10/2017	18:38:30	20:18:42	100	650	13.4	55.6
5	Ant & Dec's Saturday Night Takeaway	ITV	Entertainment	25/02/2017	19:01:00	20:29:09	88	606	12.7	53.5
6	Film: Trolls (2016)	Sky Cinema	Film	26/08/2017	11:21:55	12:50:37	88	573	12.0	59.6
7	Film: Sing (2016)	Sky Cinema	Film	21/10/2017	09:53:24	11:36:50	103	569	11.7	55.3
8	New Year's Eve Fireworks	BBC One	Entertainment	31/12/2017	23:59:19	24:13:42	14	562	11.5	72.8
9	Blue Planet II	BBC One	Documentaries	05/11/2017	20:01:37	20:59:56	58	547	11.2	53.5
10	The Gruffalo	BBC One	Film	27/12/2017	15:44:34	16:11:08	26	502	10.2	52.5
11	The Voice Uk	ITV	Entertainment	07/01/2017	20:02:30	21:33:05	90	487	10.2	48.6
12	Strictly Come Dancing Launch Show	BBC One	Entertainment	09/09/2017	19:01:04	20:38:27	97	486	10.1	46.6
13	Ninja Warrior	ITV	Entertainment	07/01/2017	18:59:36	19:57:39	58	483	10.1	35.5
14	Film: Toy Story 3 (2010)	BBC One	Film	25/12/2017	13:22:52	14:58:33	95	458	9.3	38.2
15	Film: Big Hero 6 (2014)	BBC One	Film	27/12/2017	16:12:17	17:44:16	92	444	9.0	41.9
16	Strictly Come Dancing Christmas Special	BBC One	Entertainment	25/12/2017	18:29:53	19:42:05	72	442	9.0	33.1
17	Film: The Boss Baby (2017)	Sky Cinema	Film	30/12/2017	12:31:57	14:05:25	93	433	8.8	43.5
18	Doctor Who	BBC One	Drama	25/12/2017	17:28:48	18:28:38	59	433	8.8	31.4
19	One Love Manchester	BBC One	Music	04/06/2017	18:55:00	22:09:48	194	410	8.6	55.0
20	Film: Home (2015)	BBC One	Film	24/12/2017	16:10:29	17:34:14	83	410	8.4	34.8

Source: BARB 2017. Consolidated, network. Based on the best-performing programme episode (000s). All channels include viewing to HD variants and +1s.

Figure 169: Top 20 programmes in 2017 among all children aged 10-15

	Title	Channel	BARB Genre	Date	Start time	End time	Duration	000s	Rating (%)	Share (%)
1	Britain's Got Talent (Series 11)	ITV	Entertainment	06/05/2017	20:02:00	21:15:45	73	827	19.4	71.0
2	New Year's Eve Fireworks	BBC One	Entertainment	31/12/2017	23:59:19	24:13:42	14	788	18.3	67.5
3	I'm A Celebrity - Get Me Out Of Here!	ITV	Entertainment	19/11/2017	21:02:30	22:45:59	103	714	16.6	73.6
4	Ant & Dec's Saturday Night Takeaway	ITV	Entertainment	04/03/2017	19:00:00	20:28:29	88	578	13.7	52.8
5	One Love Manchester	BBC One	Music	04/06/2017	18:55:00	22:09:48	194	574	13.5	62.8
6	The Great British Bake Off	CH4	Entertainment	05/09/2017	19:59:00	21:13:29	74	527	12.4	52.0
7	Blue Planet II	BBC One	Documentaries	29/10/2017	20:01:04	20:59:06	58	526	12.2	47.7
8	Eastenders	BBC One	Soaps	25/12/2017	21:03:00	22:03:23	60	514	12.0	44.2
9	The X Factor	ITV	Entertainment	03/09/2017	19:59:37	20:58:24	58	477	11.2	50.9
10	The Voice Uk	ITV	Entertainment	11/02/2017	20:02:28	21:15:54	73	465	11.0	52.7
11	Strictly Come Dancing	BBC One	Entertainment	28/10/2017	18:38:30	20:18:42	100	464	10.8	54.1
12	Doctor Who	BBC One	Drama	27/05/2017	19:51:02	20:37:06	46	453	10.7	40.3
13	Red Nose Day	BBC One	Entertainment	24/03/2017	18:59:05	21:59:03	179	410	9.7	50.4
14	Children In Need	BBC One	Entertainment	17/11/2017	19:22:16	21:59:23	157	409	9.5	48.8
15	Michael Mcintyre's Big Show	BBC One	Entertainment	24/12/2017	20:31:28	21:33:56	62	399	9.3	39.4
16	Sherlock	BBC One	Drama	15/01/2017	21:00:30	22:29:25	88	383	9.1	53.5
17	Mrs Brown's Boys Christmas Special	BBC One	Entertainment	25/12/2017	22:04:10	22:34:30	30	361	8.4	38.1
18	Film: Jurassic World (2015)	ITV	Films	26/12/2017	18:41:47	20:55:34	133	353	8.2	33.8
19	Strictly Come Dancing: The Results	BBC One	Entertainment	05/11/2017	19:17:56	20:00:16	42	352	8.2	35.8
20	I'm A Celebrity...Coming Out	ITV	Entertainment	15/12/2017	21:00:06	21:58:27	58	350	8.1	43.8

Source: BARB 2017. Consolidated, network. Based on the best-performing programme episode (000s). All channels include viewing to HD variants and +1s.

Figure 170: Top 20 programmes after 9pm in 2017 among all children aged 4-15

	Title	Channel	BARB Genre	Date	Start time	End time	Duration	000s	Rating (%)	Share (%)
1	New Year's Eve Fireworks	BBC One	Entertainment	31/12/2017	23:59:19	24:13:42	14	1,351	14.7	69.6
2	I'm A Celebrity - Get Me Out Of Here!	ITV	Entertainment	19/11/2017	21:02:30	22:45:59	103	1,026	11.2	69.0
3	Eastenders	BBC One	Soaps	25/12/2017	21:03:00	22:03:23	60	753	8.2	38.6
4	Britain's Got Talent Result (2017)	ITV	Entertainment	01/06/2017	21:33:15	21:59:48	26	553	6.1	46.0
5	I'm A Celebrity...Coming Out	ITV	Entertainment	15/12/2017	21:00:06	21:58:27	58	528	5.7	39.0
6	Mrs Brown's Boys Christmas Special	BBC One	Entertainment	25/12/2017	22:04:10	22:34:30	30	526	5.7	34.0
7	Keith And Paddy Picture Show	ITV	Entertainment	13/05/2017	21:22:42	21:49:07	26	496	5.5	29.9
8	Michael Mcintyre's Big Show	BBC One	Entertainment	16/12/2017	21:01:37	22:01:23	59	493	5.4	34.4
9	Coronation Street	ITV	Soaps	01/06/2017	21:03:45	21:30:39	26	481	5.3	40.0
10	Sherlock	BBC One	Drama	15/01/2017	21:00:30	22:29:25	88	468	5.2	44.4
11	Nile Rodgers And Chic: Good Times	BBC One	Music	31/12/2017	24:13:43	24:57:55	44	460	5.0	46.7
12	The Apprentice: The Final	BBC One	Entertainment	17/12/2017	21:12:37	22:13:07	60	455	4.9	41.0
13	Peter Kay's Car Share	BBC One	Entertainment	11/04/2017	21:02:11	21:29:09	26	454	5.0	36.5
14	The Apprentice	BBC One	Entertainment	25/10/2017	21:00:32	21:59:29	58	411	4.5	34.1
15	Casualty	BBC One	Soaps	25/11/2017	21:12:06	22:00:44	48	382	4.2	22.7
16	Ratburger	Sky One	Film	23/12/2017	26:01:01	27:26:49	85	326	3.5	86.7
17	Not Going Out	BBC One	Entertainment	24/12/2017	21:35:25	22:14:06	38	316	3.4	26.1
18	Through The Keyhole	ITV	Entertainment	11/02/2017	21:20:36	22:18:41	58	312	3.5	26.2
19	Death In Paradise	BBC One	Drama	09/02/2017	21:01:09	21:59:08	58	304	3.4	26.0
20	Gogglebox: Celebrity Special SU2C 2017	CH4	Entertainment	03/11/2017	21:01:52	22:15:04	73	302	3.3	26.2

Source: BARB 2017. Consolidated, network. Based on the best-performing programme episode (000s). All channels include viewing to HD variants and +1s.

A13. 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 multichannels 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.

Average weekly reach – the percentage of the total TV population who watched any TV or a channel in a typical week. Data can also be expressed in 000s. There are various ways of defining the amount of viewing an individual must have done in order to be counted as having been reached. The BARB definition if for this to be at least three consecutive minutes while Ofcom defines this to be at least 15 consecutive minutes, unless otherwise stated.

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 children's multichannels.

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 multichannels 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.

Unmatched viewing – this is defined in BARB analysis as when the TV set is in use but the content cannot be audio-matched or otherwise identified by BARB. This includes gaming, viewing of DVDs/box sets/archives, SVoD, time-shifted viewing beyond 28 days, apps on smart TVs and navigating EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded.