



Media Literacy Audit:

Report on UK adults from ethnic minority groups

Research Document

Publication date: 15 September 2008

Contents

Section		Page
1	Executive summary	3
2	Introduction	12
3	Ethnic minority groups in the UK	16
4	Indian adults	28
5	Pakistani adults	82
6	Black Caribbean adults	136
7	Black African adults	189
Annex		Page
1	Research methodology	244
2	Glossary	248

Section 1

Executive summary

The promotion of media literacy is a responsibility placed on Ofcom by Section 11 of the Communications Act 2003. Ofcom's definition of media literacy, developed after formal consultation with stakeholders, is "the ability to access, understand and create communications in a variety of contexts". The purpose of this report is to provide a rich picture of the different elements of media literacy across the key platforms of television, radio, the internet and mobile phones. It is a report that looks specifically at adults (aged 16+) from ethnic minority groups (EMGs) within the UK population. People surveyed for this research will be of ethnic origin and may have been born in the UK or overseas but now reside in the UK. Respondents were given the option of conducting the survey in English, Punjabi, Gujarati, Urdu, French, Somali or Arabic North African.

The general UK adult population was surveyed as part of the wider Media Literacy Audit at the same time as fieldwork for this report was being conducted¹. Comparisons are made to the total UK adult population throughout this report, for context².

According to the 2001 Census,³ EMGs⁴ represent 7.9% of the UK population. The four largest groups are:

- Indians, representing 1.8% of the UK population;
- Pakistanis, representing 1.3% of the UK population;
- Black Caribbeans, representing 1.0% of the UK population; and
- Black Africans, representing 0.8% of the UK population.

Other groups reported in the Census are mixed race (1.2%), Bangladeshi (0.5%), other Asian (0.4%), Chinese (0.4%), Black other (0.2%) and other ethnic groups (0.4%).

For this report we selected the four largest ethnic minority populations living within the UK and interviewed a representative sample of 300 adults from each. The four EMGs that are covered in this report are therefore Indian, Pakistani, Black Caribbean and Black African adults.

¹ See Section 2 for further details of the methodologies used.

² The Adult Media Literacy Audit contained a sub sample representative of the total size of the EMG population (7.9% of the respondents).

³ See www.statistics.gov.uk

⁴ The 2001 Census asked the following questions related to Country of Birth and ethnicity.

Country of birth. "What is your country of birth?" with tick box options of: England; Wales; Scotland; Northern Ireland; Republic of Ireland and Elsewhere, please write in the present name of the country.

Ethnic Group. "What is your ethnic group? Chose ONE section from A to E, then tick the appropriate box to indicate your cultural background.

A **White.** Tick box options of: British; Irish or Any other White background (please write in).

B **Mixed.** Tick box options of: White and Black Caribbean; White and Black African; White and Asian or any other Mixed background (please write in).

C **Asian or Asian British.** Tick box options of: Indian; Pakistani; Bangladeshi; Any other Asian background (please write in).

D **Black or Black British.** Tick box options of: Caribbean; African; Any other Black background (please write in).

E **Chinese or other ethnic group.** Tick box options of: Chinese; Any other (please write in).

Each chapter in this report looks at elements of media literacy within the specific ethnic minority group, structured according to the elements of Ofcom's media literacy definition:

Access includes take-up of media devices and the internet, volume and breadth of use.

Understand includes interest and competence in using the features available on each platform, extent and levels of concern about content, trust in internet sites, trust in news, and knowledge of regulation and funding sources.

Create includes people's confidence in engaging with creative content, and their interest in carrying out creative tasks, notably using social networking sites.

While almost everyone engages with media to some degree, the extent of media literacy varies across the UK population, and this variation is apparent across each of the three elements of media literacy outlined above. We have found that age and socio-economic group play a pivotal role in the extent of a person's media literacy.

EMGs tend to be younger than the UK population in general. The proportions of adults aged 16-44 are:

- 52% of the UK adult population as a whole;
- 67% of Indian adults;
- 74% of Pakistani adults;
- 62% of Black Caribbean adults; and
- 83% of Black African adults.

This research has found that under-45s tend to be more engaged with digital media, and aspects such as take-up are higher among EMGs because of their younger age profile. However, we have found that while this younger age profile does influence many of the differences in media literacy measures, it is not the only influencing variable. Other socio-economic and cultural factors also appear to be playing a role.

Variations in media literacy are evident within specific EMGs, between EMGs, and when compared to the UK population in general. Within each EMG covered in this report, under-45s and ABC1s are more likely to use media devices and to be interested in their functionality – to a greater degree than their counterparts in the general UK population.

Looking across the EMGs and comparing them with the UK population as a whole, there are clear differences. Overall, people from EMGs are at the forefront of digital device take-up and use; this is particularly the case for Indians and Pakistanis. When watching television, most people are using another media device at the same time. Compared to the UK population as a whole, EMGs are more likely to live in a household which has the internet and/or a mobile phone. In general they are more interested in the various functions or interactive features available on digital media.

Indians and Pakistanis claim to spend more time online than people from the other two EMGs, and compared to the UK population in general.

When looking specifically at creative uses of media, all four of the EMGs report higher levels of downloading music and programme content as well as carrying out creative activities.

Compared to the UK overall, they are more likely to upload photographs and develop social networking profiles.

With the exception of the internet, a higher proportion of EMGs are concerned about media platforms. They have greater concern about what is on the television and radio, and more concerns, in general, about gaming and mobile phones. However, concern and the types of concern vary between EMGs. The proportion of adults from EMGs who express some concern about what is on the internet is broadly similar to the UK population as a whole.

Access

The following table summarises home ownership of digital television, internet access and personal use of a mobile phone. The multiple platform ownership measurement illustrates the proportion of people who have access to all three of these devices. The last measurement refers to the percentage of adults (16+ years) whose household is currently not connected to the internet but who intend to be connected in the next 12 months.

Key access measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK adults total
**Multiple platform ownership	62%	65%	55%	62%	53%
Digital TV ownership	83%	89%	81%	82%	82%
Mobile phone take-up	90%	91%	88%	95%	85%
Internet take-up	76%	72%	64%	69%	62%
*Willingness to get internet	25%	35%	30%	30%	15%

** Home ownership of digital television, internet and mobile phone

* Base: All adults who do not have the internet at home

Adults from EMGs are at the forefront of media take-up

The majority of EMG adults live in households which have multiple platform access. Indian, Pakistani and Black African adults are more likely to live in households with multiple platform access than are the UK population as a whole (62%-65% compared to 53% in the UK population as a whole). Across all the EMGs, take-up of media platforms is higher among under-45s and ABC1s. Among Indian and Pakistani adults, males are more likely to have access to the internet at home and use a mobile phone than are females.

Pakistani adults are more likely to have digital television (89%) than any other adults in the UK. Indian, Pakistani and Black Caribbean adults are more likely to receive their television service through satellite or cable services than through Freeview. This is perhaps not

surprising, considering that satellite and cable services offer an array of international channels, including foreign news, which are known to be core drivers of take-up among EMGs⁵.

Mobile phone take-up is higher among each of the EMGs than among the UK population as a whole. In comparison, the level of in-home internet access is comparable across the UK population as a whole, Black Caribbeans and Black Africans, but significantly higher among Indian and Pakistani adults. Indians and Pakistanis also spend more time online than others.

Take-up of the internet is likely to continue at a higher level among EMGs than the general UK population over the next 12 months, based on claimed intentions

Between 24% and 36% of EMGs do not currently have internet access at home, compared with 37% of the UK population as a whole. Based on people's claimed intentions, it is likely that internet penetration in EMG households will continue to increase over the next 12 months. However, the current economic conditions may influence some people's intentions over this period.

Online activities are dominated by communication and finding information for work/studies

The online activities most mentioned by the UK population in general and specifically by EMGs are communicating (including email, instant messaging) and finding out information for work and/or studies. A wider range of online tasks is undertaken by under-45s, and ABC1s.

Indian and Pakistani internet users conduct a similar number of activities online to the UK average, while Black African internet users conduct fewer activities. One activity that all EMGs do less (19% - 29%) than the UK on average (41%) is conducting transactions online (such as banking, making purchases or using online auction sites).

EMGs are less likely to participate regularly in more traditional media activities such as reading a newspaper or magazine or watching a DVD

Most EMG adults say they watch television and talk on their mobile phone regularly. However, fewer people than in the UK population on average participate in traditional media activities such as reading a newspaper/magazine or watching a DVD. Black Caribbean and Black African adults are the least likely to consume these types of media.

The importance of mobiles and the internet reflect the younger population, as well as socio-demographic and cultural factors

Watching television is the media activity that many EMG adults say they would miss the most. However, mobile phones are also important, particularly among the under-45s, with between 24% and 43% saying they would miss their mobile the most. Black Africans are the group most attached to their mobiles.

The internet is also important to the under-45s. While adults under 45 in the UK population overall are likely to say they would miss their mobile or the internet the most, the figures are higher among Pakistani and Black African adults in the same age range, suggesting that other socio-demographic or cultural influences are playing a part.

⁵ See Ofcom research report *New News, Future News* published 26 June 2007
<http://www.ofcom.org.uk/research/tv/reports/newnews/>

The majority of EMG adults are using more than one media device while watching television or using the internet

A large majority of EMGs say they use another digital device while watching television or using the internet – these figures are significantly higher than in the UK overall. Talking on the telephone, whether fixed or mobile, is the most commonly mentioned activity that people do while watching television.

Understand

Two areas that we use to measure understanding in media literacy are *interest in*, and *confidence in using*, a variety of functions offered by media devices. We also examine the concerns that people have about media content or about the devices themselves.

The table below summarises the percentage of adults who expressed interest in any of the digital features listed in the research for each platform. The second half of the table summarises the proportion of adults who expressed concern regarding content delivered on that platform.

Key understand measure

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK adults total
Interest in...					
digital TV functions	77%	79%	85%	91%	67%
digital radio functions	68%	72%	77%	78%	61%
internet functions	100%	98%	98%	100%	97%
mobile functions	98%	95%	98%	97%	94%
Concerns					
TV	65%	73%	73%	60%	55%
Radio	35%	34%	42%	32%	12%
Internet	65%	69%	64%	65%	63%
Mobile	57%	57%	57%	48%	34%
Gaming	37%	46%	41%	38%	30%

Adults from EMGs are more likely to be interested in, and confident about using, interactive functions than the general UK population

Overall interest in the various functions that we assessed for digital television and radio is significantly higher among all EMGs than among the UK population as a whole.

Over three-quarters of adults from each of the EMGs said that they were interested in the digital television functions that we asked about (such as using the interactive button on the remote, setting up a menu of favourite channels, selecting different viewing angles and using a PIN to block access). Black Africans and Black Caribbeans were the most likely to show interest. Using the interactive button on the remote was the feature attracting most interest.

Adults from each of the EMGs are also more likely to be interested in radio functions. Most interest was shown in being able to see the details of music as it is being played.

Interest in internet functions differs by EMG. Black Caribbeans and Black Africans are more likely to say they are interested in installing security features, doing online banking (along with Pakistani adults) and joining online debates than others. Generally speaking, fewer Indian internet users are interested in the specific internet functions we asked about, compared with the other EMGs.

Almost all of the EMGs expressed interest in mobile phone functions, with text messaging, not surprisingly, attracting the most interest. Three in five Indian, Pakistani and Black Caribbean adults are interested in accessing their mobile operator's web portal – significantly more than Black African adults.

Despite the higher proportion saying they have various media devices and are interested and confident about using their interactive functions, the proportion of EMG adults who say they are confident about finding information online is lower (69% - 83%) than the UK population as a whole (91%).

Awareness of how television programmes are funded is higher than awareness of how radio programming, or certain online content, is funded

We asked respondents what the main source of funding was for BBC television and radio programming and the BBC website, as well as for commercial television and radio programming, and search engines.

Awareness of how BBC television programming is funded is higher than awareness of how commercial television programming is funded. The main variations across the EMGs are among Indian and Pakistani adults. Awareness of funding among these two communities is higher for commercial radio stations than for BBC radio stations. In general, awareness in this area is lower among under-45s and C2DEs.

Similarly, funding awareness among Indian and Pakistani adults is higher for search engines than for the BBC website.

Compared to awareness across the UK population overall, awareness of BBC funding is significantly lower among Indian and Pakistani adults.

There is a degree of confusion about how content is regulated

We also asked people whether they thought television, radio, internet, mobile phones and electronic gaming were regulated or not.

Awareness of regulation, apart from television and radio, is mixed - and similar to the UK population as a whole, in that there is confusion and lack of knowledge/understanding in this area.

Although the majority of adults in EMGs are aware that television is regulated, awareness does vary by EMG. Awareness of television regulation is higher among Black Caribbeans than among Indian, Pakistani and Black African adults, and awareness of the watershed is lower among Indian and Black African adults.

Between 51% and 63% of EMGs say radio broadcasts are regulated. Awareness among Black Caribbean (63%) and Black African adults (57%) is comparable with the UK overall (58%) but awareness is significantly lower among Indian (51%) and Pakistani adults (47%).

Understanding of whether internet content is regulated is mixed; opinion is divided between EMGs saying that content is regulated, not regulated or 'don't know'. Indian adults are more likely to say that internet content is not regulated (41%), whereas Pakistani (39%), Black Caribbean (42%) and Black African (41%) adults are more likely to say that it is regulated.

In comparison with the EMG population, people in the overall UK population are more likely to say they don't know whether the internet is regulated.

Similarly, opinion among EMGs is split on whether mobile phone content and gaming are regulated.

Awareness of whether mobile phone content is regulated also differs by EMG. Over two in five Black Caribbeans and Black Africans adults say they don't know whether mobile phone content is regulated. In contrast, between 36% and 38% of Indian and Pakistani adults say that mobile phone content is regulated.

Across the different EMGs in this report, over two in five say they don't know whether gaming is regulated or not.

Around half of the UK population as a whole don't know whether mobile phone content and gaming is regulated or not.

Online content has a role to play in informing, educating and entertaining

Views are mixed about the main role of media content.

Adults from EMGs are more likely to say that the role of the internet is to educate or inform than it is to entertain. Although there is little demographic variation among those who say the main role of the internet is to educate, under-45s and C2DEs are more likely to say they think the main role is entertainment.

At the UK overall level, 47% agree that the main role of online content should be to entertain and 73% agree that it should be to inform and educate. Across each of the EMGs, between 48% and 59% agree it should be for entertainment, and Black Africans are the most likely to agree (59%).

Indian adults are less likely to agree that the main role is to inform and educate (61%) than are Pakistani and Black African adults; they share a similar opinion to the UK total.

In general, a higher proportion of people from EMGs say they are concerned about media than the UK population in general

Over three in five adults from EMGs are concerned about the internet - similar to the UK population in general. One of the main differences in the types of concern is the higher level of concern among EMGs about PC viruses and security.

Concerns about mobile phones and gaming are higher among EMGs than in the UK population in general. Mobile phone concerns are related mainly to affordability.

Pakistanis and Black Caribbeans are most likely to express concerns about what is on television, followed by concerns about what is on the internet. For Indian adults, equal proportions are concerned about the television and the internet. Black African adults are most likely to say they are concerned about the internet, followed by television. Across all EMGs, fewer adults mention concerns about gaming and radio, than the other platforms.

Concerns about television content are mainly about offensive content, while concerns expressed about the radio include poor quality programming and offensive content.

Among Indian adults, concerns about what is on the television and radio are higher among C2DEs and females. Among Pakistani adults, concerns about television, the internet and gaming are higher among ABC1s. Among Black African adults, concerns about what is on the television are greater among over-44s and concern about the internet is higher among under-45s and ABC1s.

Pakistani adults are more likely to mention poor quality programming, and specifically the view that there are too many adverts.

Create

We measured people's participation in creative activities by asking internet users how confident they felt about using creative functions online, and whether they had any experience or interest in creating online content. The creative activities we assessed were: *experience* of downloading different types of programming and audio content and *interest* in activities such as uploading photos, creating a social networking profile, contributing to blogs and creating videos that are later uploaded.

We also asked how confident people felt about carrying out these creative activities on the internet.

Key create measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK adults total
Confidence creating content	62%	64%	59%	62%	66%

It is interesting that despite take-up of the internet among EMGs and their use of it for creative activities such as consuming and creating content, they are less likely to say they are confident in creating content than the average for the UK population.

EMGs are more likely to use certain creative functions than the UK population overall

Adults from EMGs are interested in engaging with creative content; they are more likely to say they have downloaded music, video clips and longer content such as films and television programmes, than the UK population as a whole. They have experienced a range of creative activities including uploading photos and setting up social networking profiles.

Again, the higher proportion carrying out creative activities is not just due to the younger age profile of the four EMGs covered in this report. Further analysis of the data shows that EMG under-45s are more likely to use creative functions than under-45s in the UK population in general. This may be influenced by cultural factors, and among Indian adults, by socio-economic factors.

Learn

It is particularly noteworthy that all EMG respondents show greater levels of interest in learning about digital technology (38% - 54%) than the UK average (31%). Indian and Pakistani adults are more likely than other groups to be interested in learning about creating a website (13-15% compared to 8% UK average), while Indian (8%), Pakistani (12%) and Black Caribbean adults (8%) are more interested than Black Africans (6%) or the UK average (4%) in learning about setting controls for internet access. Overall, although varying in preference by group, the most popular options for learning about digital technology are 'asking friends or family', 'reading the manual' or 'trial and error'.

However, Indian adults are more likely than the UK average to prefer to learn via a supplier or store (26% compared to 12%) and Indian and Pakistani adults are more likely than the UK average to choose to go to a class (13%-16% compared to 6%).

Section 2

Introduction

2.1 Background

As outlined in the Ofcom *Annual Plan*⁶, a media-literate society will have the skills, knowledge and understanding that people need to make full use of the opportunities presented by both traditional and new communications services. It will enable people to protect themselves and their families from possible risks presented by new services. We will continue working with other public bodies and with our stakeholders to fulfil Ofcom's aim of supporting UK children and adults in acquiring the ability to engage confidently with the ever-growing range of sophisticated communications services.

The promotion of media literacy is a responsibility placed on Ofcom by Section 11 of the Communications Act 2003.

Ofcom's work to promote media literacy is intended:

- to give people the opportunity and motivation to develop competence and confidence to participate in communications technology and digital society; and
- to inform and empower people to manage their own media activity (both consumption and creation).

This report is a research-based document designed to give a thorough understanding of media literacy among specific EMGs within the UK. The four EMGs that are covered in this report are Indian, Pakistani, Black Caribbean and Black African adults. All measures are reported at the total level for each EMG. Where possible, we show measures by gender, age, socio-economic group, and the presence of children in the household within EMGs.

2.2 Defining media literacy

Ofcom's definition of media literacy, developed after formal consultation with stakeholders, is:

'the ability to access, understand and create communications in a variety of contexts'

In order to track media literacy we needed to convert our definition of media literacy into quantifiable elements, and so have used the following measures as proxies for some of the key areas of media literacy. It is important to note that our definition of 'access' is much wider than simple availability or take-up of the platforms. Rather, it focuses upon interest, awareness, use and competence.

⁶ *Annual Plan 2008/2009* published 3 April 2008 http://www.ofcom.org.uk/about/accoun/reports_plans/

The following box summarises the quantifiable elements of the media literacy framework detailed in this report:

Access

- Use, volume of use and breadth of use of the platforms

Understand

- Interest in, and awareness of, the digital features of the various media platforms
- Knowledge of regulation
- Knowledge of how elements of each media platform are funded
- Trust in news outlets on each medium
- Trust in internet sites
- Competence in using the features available on each platform
- The extent and level of concerns with each platform
- Knowledge of and competence in using content controls, such as ability to block unwanted email messages

Create

- The ability of individual users to create their own content
- The ability of users to interact with the medium or with other users.

We also asked a range of other questions about media habits and preferred media forms, which add further context and background to the research.

2.3 Objectives

The key objectives of the Audit are:

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

The results of this Audit provide a guide to many of the key elements of media literacy. It is Ofcom's intention to continue to repeat this Audit in future, to track how these elements evolve over time.

2.4 Methodology

This report draws mainly on research from two sources of consumer research; the EMG Media Literacy Audit and the Adult Media Literacy Audit.

Ofcom Ethnic Minority Groups' Media Literacy Audit

The Ofcom EMG Media Literacy Audit is a quantitative survey that involved conducting in-home face-to-face interviews with 1200 respondents throughout the UK. Fieldwork took place from October to December in 2007.

Interviews were conducted among members of the Indian, Pakistani, Black Caribbean and Black African communities by a specialist research agency, Ethnic Focus. Respondents were given the option of conducting the survey in English, Punjabi, Gujarati, Urdu, French, Somali or Arabic North African.

According to the 2001 Census⁷ EMGs represent 7.9% of the UK population. The four largest groups are

- Indian 1.8%
- Pakistani 1.3%
- Black Caribbean 1.0%
- Black African 0.8%

Other groups reported in the Census are mixed race (1.2%), Bangladeshi (0.5%), other Asian (0.4%), Chinese (0.4%), Black other (0.2%) and other ethnic groups (0.4%).

For this report we selected the four largest ethnic minority populations living within the UK and interviewed a representative sample of 300 adults from each. The four EMGs that are covered in this report are therefore Indian, Pakistani, Black Caribbean and Black African.

Full details of the research methodology can be found at Annex 1.

Note: from this point forward in the report, references made to EMGs will include only the four groups covered in the research and will *not* refer to the total UK EMG population.

Ofcom Adult Media Literacy Audit

The Ofcom Adult Media Literacy Audit is a quantitative survey that involved conducting in-home face-to-face interviews with 2905 respondents throughout the UK. Fieldwork took place from October to December in 2007.

Full details of the research methodology can be found at Annex 1.

2.5 Analysis

The main points of reference in this report are between each of the four EMGs and a nationally representative sample of the UK population as a whole. Where possible, within each EMG, demographic analysis is conducted by age, gender, socio-economic group and presence of children in the household.

We do not present single data points representing all EMGs in this report. EMGs are not a homogenous group and differ significantly on a multitude of measures. Therefore, a single measure for EMGs as a whole would not provide an accurate insight into media literacy behaviour and would have been difficult to determine because of the complexities in sampling and weighting the data in order to make them representative.

2.6 Statistical reliability

Significance testing at the 95% confidence level was carried out. This means that where findings are reported as 'significant', there is only a 5% or less probability that the difference between the samples is by chance, and is different from the main population. Where findings are reported as 'significant', this is what is being referred to.

⁷ See www.statistics.gov.uk

2.7 Structure of the report

The report is structured according to Ofcom's definition of media literacy.

Section 3: 'Ethnic Minority Groups in the UK' covers the demographic profiles of each of the groups and how they compare to the UK population as a whole.

Section 4: 'Indian adults' covers the media literacy elements; access, understand and create, within the Indian population.

Section 5: 'Pakistani adults' covers the media literacy elements; *access, understand* and *create*, within the Pakistani population.

Section 6: 'Black Caribbean adults' covers the media literacy elements; *access, understand* and *create*, within the Black Caribbean population.

Section 7: 'Black African adults' covers the media literacy elements; *access, understand* and *create*, within the Black African population.

Annex 1 presents a detailed explanation of the research methodologies used.

Annex 2 is a glossary of terms used through this report.

2.8 Further publications

Alongside this report, separate reports have been published, focusing on the media literacy of children in the UK and on adults⁸.

⁸ http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrssi/

Section 3

Ethnic minority groups in the UK

3.1 Demographic profile

There are demographic differences between adults in ethnic minority groups (EMGs) and adults in the total UK population. These demographic differences are relevant to the interpretation of the findings from this study and are detailed in this section. While the remainder of this report details the findings for adults in each of the four EMGs individually, this section makes comparisons between the UK adult population and the populations of Indian, Pakistani, Black Caribbean and Black African adults in the UK.

Following the illustration of the demographic profile of the four EMGs below, the influence of age and socio-economic group on take-up of media and media behaviour is discussed.

3.2 Age profile

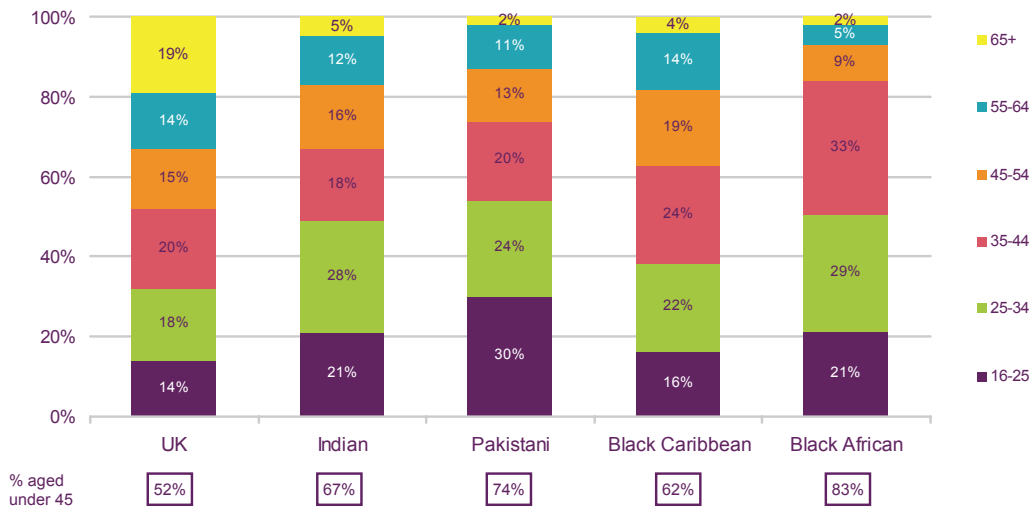
Age is a critical factor in assessing media literacy, as under-45s tend to have a greater take-up of, interest in, confidence with, and volume of use of digital media. At the same time, under-45s tend to be less aware of sources of funding for media and the regulatory environment, and also tend to have fewer concerns.

The individual EMGs contained within this report have a younger age profile when compared to the UK population as a whole. Under-45s account for at least three in five adults (62% to 83%) in each EMG compared to half (52%) of the general UK adult population. By contrast, one in five (19%) in the UK adult population is aged 65 and over, compared to less than one in twenty (2% to 5%) in each EMG. The Office for National Statistics (ONS) attributes this different age profile to past immigration and fertility patterns⁹.

Because of the importance of age in influencing media literacy, we frequently make comparisons between adults aged 16 to 44 and those aged 45 and over throughout this report.

⁹ <http://www.statistics.gov.uk/>

Figure 1: Age distribution



S2B – Age of respondent
 Base: All adults aged 16+ (2905 UK, 300 Indian, 300 Pakistani, 300 Black Caribbean, 300 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

3.3 Socio-economic group

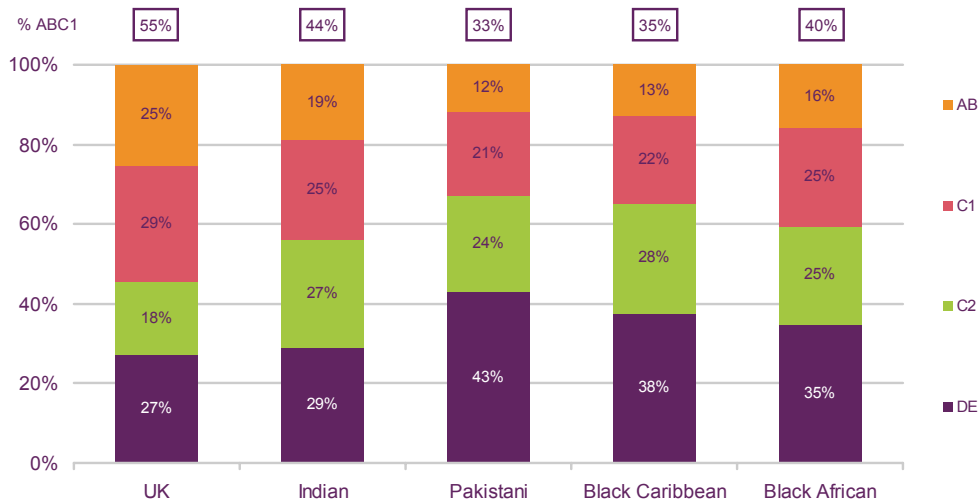
The socio-economic group of the household also has implications for media literacy. It is known that ABC1 households tend to have greater take-up, interest in, confidence with and volume of use of digital media, as well as being more likely to make checks and judgements about websites, while having more concerns about platform content generally.

The proportion of ABC1 households differs considerably across the EMGs, accounting for over two in five (44%) Indian adults, two in five (40%) Black African adults, and around one in three (33%), Pakistani adults and Black Caribbean adults (35%).

Within the general UK adult population, over half (55%) of adults are in ABC1 households.

Again, socio-economic status is an important variable in influencing media literacy, we frequently make reference to ABC1 and C2DE social groups throughout this report.

Figure 2: Household socio-economic group



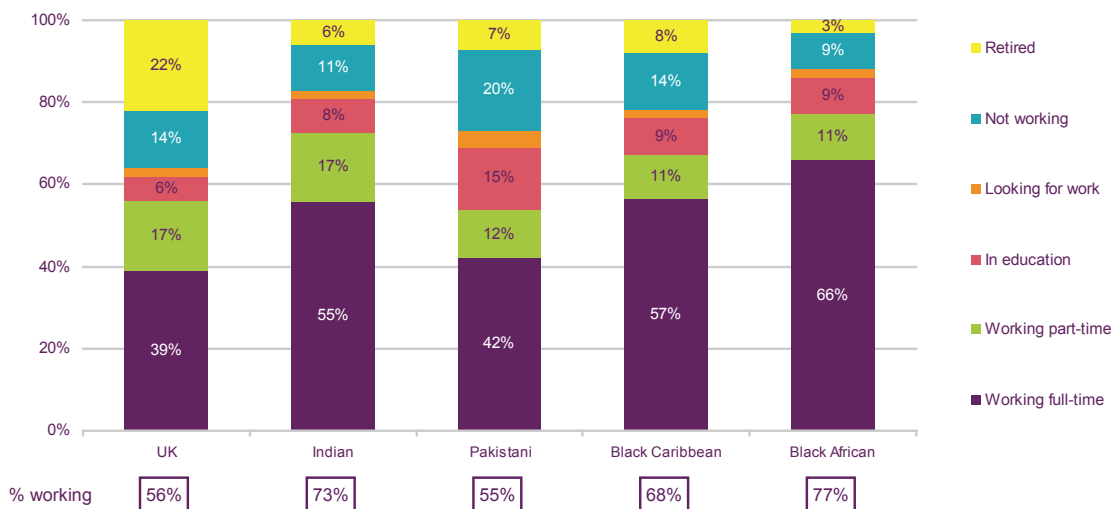
S1 – What is the occupation of the main wage earner in your household?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 300 Pakistani, 300 Black Caribbean, 300 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

3.4 Working status

Working status tends to be correlated with age, household income and socio-economic group, and is an influencing variable when looking at digital media and media literacy levels.

Black African adults (77%) and Indian adults (73%) are the most likely to be working (either full-time or part-time), followed by Black Caribbeans (68%). Pakistani adults are the least likely to be working (55%). The proportion of working adults in the Pakistani population is at a similar level to the general UK population (56%), despite the younger age profile in this EMG.

Figure 3: Working status

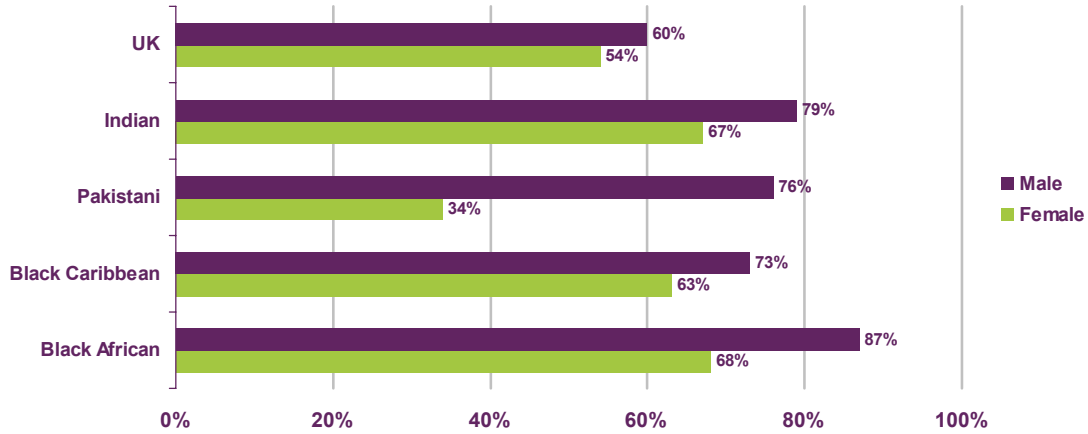


C6 – Are you currently working? Is that full-time or part-time? Are you looking for work?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 300 Pakistani, 300 Black Caribbean, 300 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

When looking at gender differences in working status, each of the EMGs has a greater gap between males and females who are working than is found in the UK population at large. This is particularly the case in Pakistani households. Here the lower proportion of working

Pakistani adults can be explained to some degree by the lower proportion of working females within the Pakistani population. This reflects a cultural difference in attitudes towards women working outside the home.

Figure 4: Working status by gender



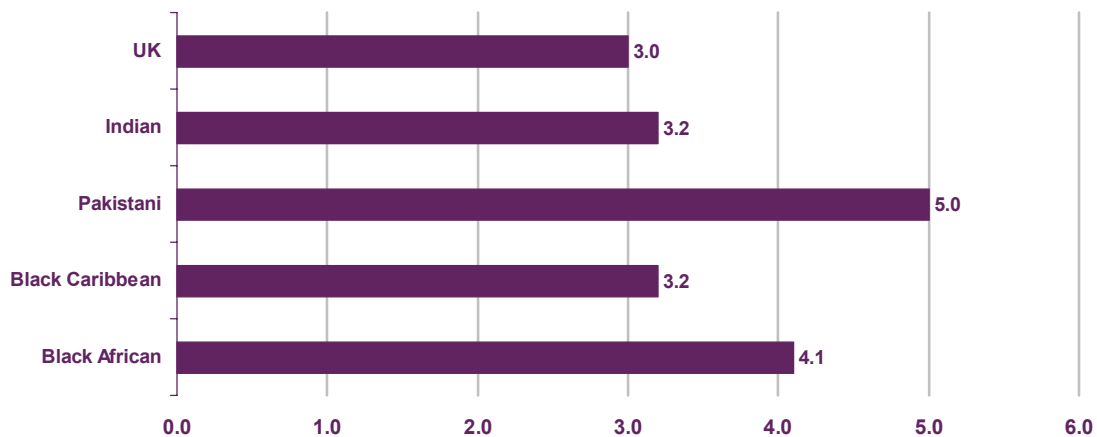
C6 – Are you currently working? Is that full-time or part-time? Are you looking for work?
 Base: All adults aged 16+ (1370 UK male, 1535 UK female, 147 Indian male, 153 Indian female, 153 Pakistani male, 147 Pakistani female, 143 Black Caribbean male, 157 Black Caribbean female, 147 Black African male, 153 Black African female)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

3.5 Household size and presence of children in the household

Household size and the presence of children also influence take-up and consumption of digital media, as they are likely to affect the number and type of devices in the household, access to the devices owned by the household, and where the devices are located.

EMG households are generally larger than households in the general UK population, although there is considerable variation across the four groups. Pakistani households are the largest, with an average size of 5.0 people, followed by Black African households (4.1 people), then Indian and Black Caribbean (each 3.2 people).

Figure 5: Average household size

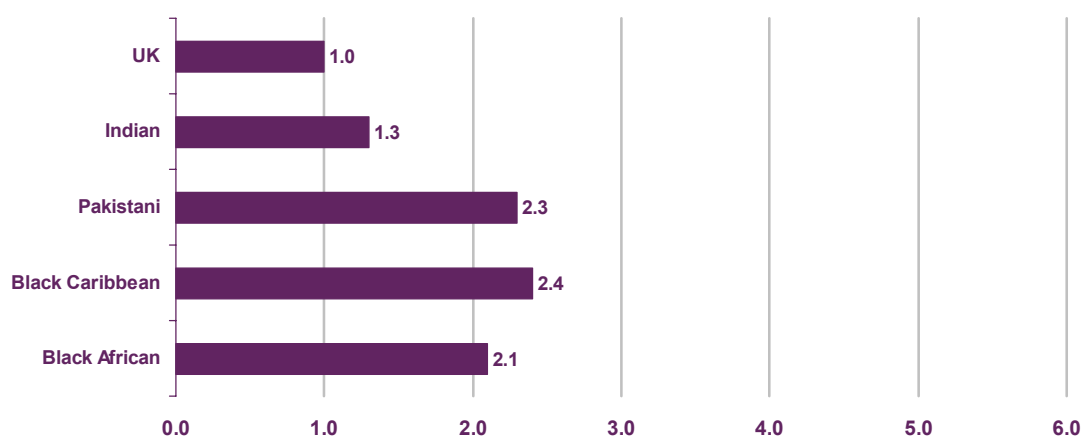


C2 – How many people are there in your household in total (including yourself)?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 300 Pakistani, 300 Black Caribbean, 300 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Given the younger age profile, people from EMGs are more likely than the average UK population to have children in the household. Again, there are significant variations across the four EMGs. The highest average number of children are found in Black Caribbean

households (2.4 children), followed by Pakistani (2.3 children), Black African (2.1 children), and Indian (1.3 children).

Figure 6: Average number of children in household



C3 – Do you have any children who live at home with you? How many of your children live at home with you?
Base: All adults aged 16+ (2905 UK, 300 Indian, 300 Pakistani, 300 Black Caribbean, 300 Black African)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

3.6 The influence of demographics on behaviour

We highlighted in the Executive Summary that the younger age profile explains a number of differences between the various EMGs included in the report and the UK population in general. While this report covers each EMG separately, in the interests of being concise and to clarify the influence demographic profiles play in understanding the results, the following sub-section is a summary of key take-up figures and media behaviour across all of the EMGs.

Comparing take-up of media between EMGs and the UK population, take-up is generally higher among EMGs. When age is taken into consideration by comparing under-45s only, there are fewer differences between the UK population and the EMGs, indicating that differences in the total population are largely driven by age variations between the populations.

In contrast, when we look at using media, variations in behaviour between EMGs and UK adults continue to be present even when age and socio-economic group are taken into consideration. For example, the range of media activities that people participate in is higher among UK adults, regardless of age or socio-economic group, due to the higher readership of newspapers and magazines. The proportion that use more than one media device at the same time is significantly higher among EMGs, regardless of demographic profile. Therefore, it is apparent that there are cultural and attitudinal differences which are influencing behaviour.

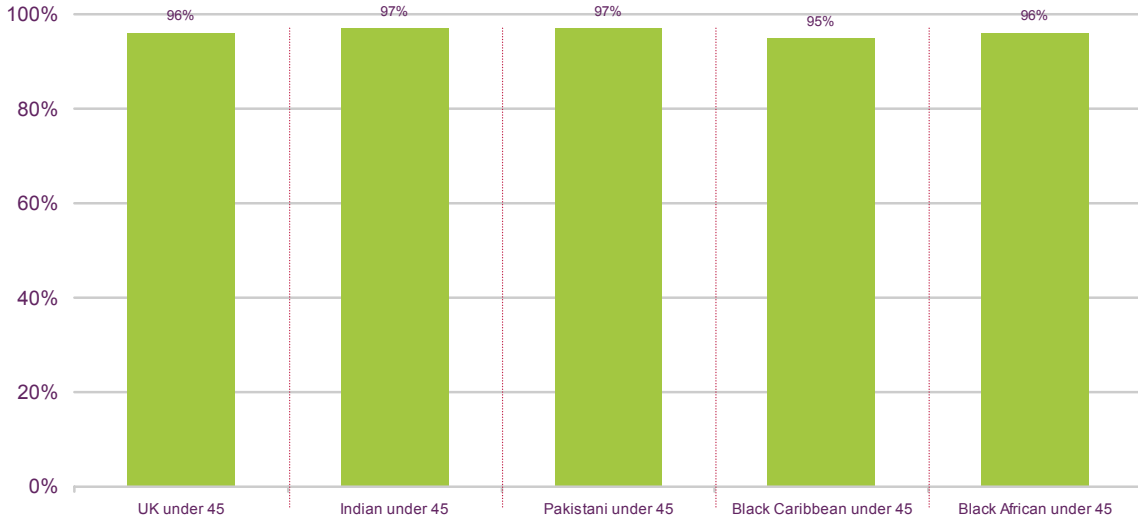
The influence of age and socio-economic group on take-up of media services

In general, take-up of the internet and of mobile phones is higher among EMGs than for the UK population in general. When we compare under-45s in each of the populations we are able to get a greater insight into whether the differences are due to age, or to other factors such as cultural and attitudinal influences.

Among under-45s the differences in take-up between EMGs and the UK in general are less obvious. Take-up of the internet and mobile phones is significantly different only between

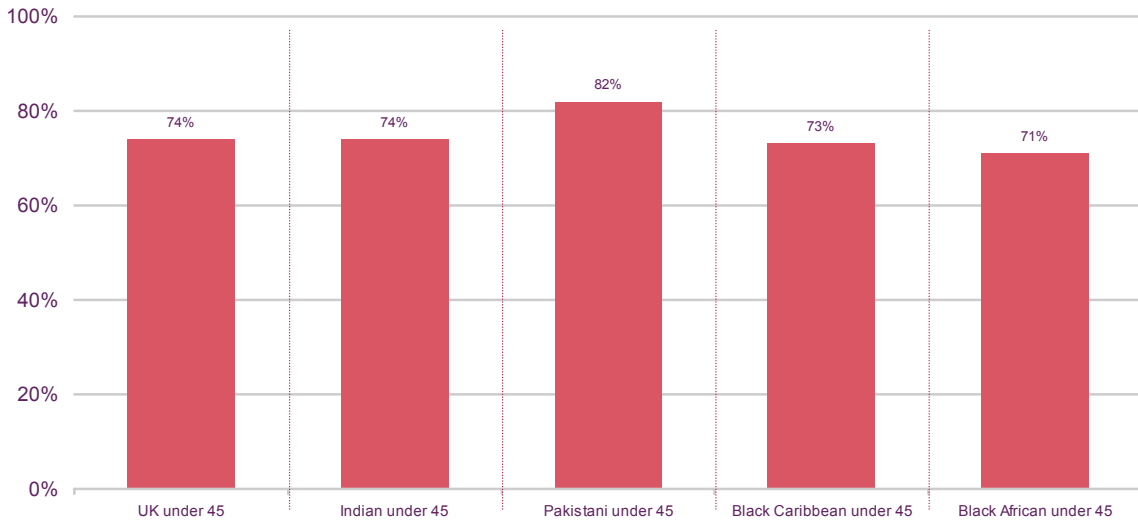
Pakistani under-45s and UK under-45s. We can therefore infer that the differences in take-up are largely determined by differences in age profile.

Figure 7: Take-up of mobile phones by age



M1 – Do you personally use a mobile phone?
 Base: All adults aged 16-44 (1547 UK, 206 Indian under 45, 201 Pakistani under 45, 182 Black Caribbean under 45, 190 Black African under 45)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

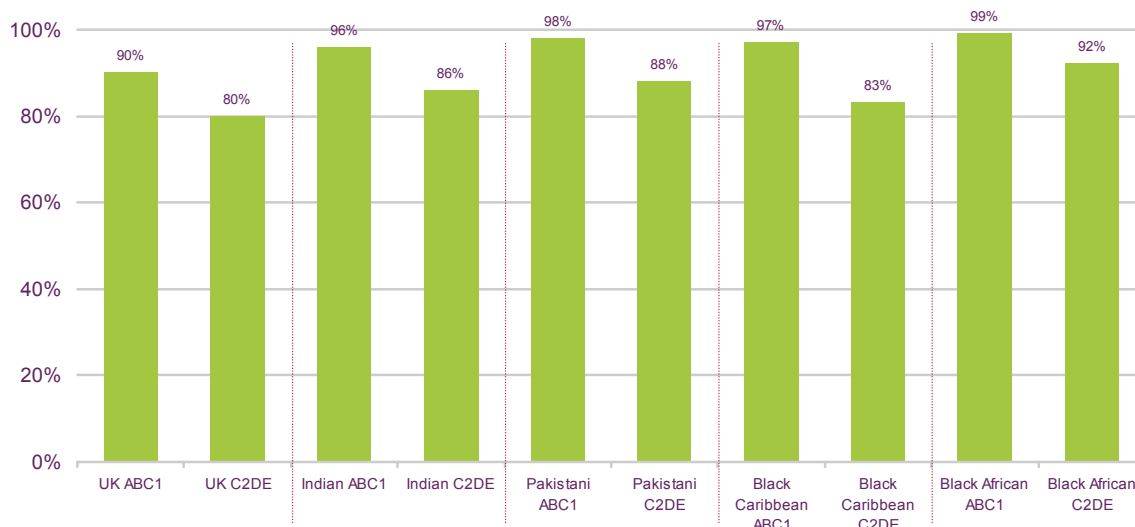
Figure 8: Take-up of the internet by age



IN1 – Does anyone in your household have access to the internet at home through a computer or laptop?
 Base: All adults aged 16-44 (1547 UK, 206 Indian under 45, 201 Pakistani under 45, 182 Black Caribbean under 45, 190 Black African under 45)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

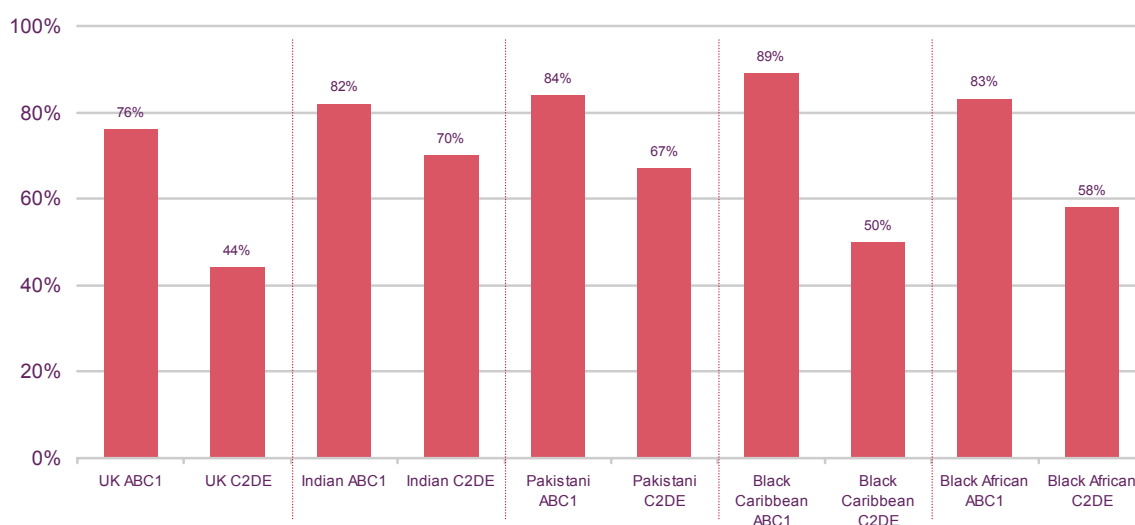
The picture is not the same when we look at the various populations by socio-economic group. There is greater take-up among EMGs (compared to UK adults in general) among both ABC1s and C2DEs. In particular the socio-economic group differences observed in internet take-up in the UK population are less pronounced in EMGs. This implies that socio-economic group is less of a barrier to take-up among EMGs.

Figure 9: Take-up of mobile phones by socio-economic group



M1 – Do you personally use a mobile phone?
 Base: All adults aged 16+ (UK: ABC1 1388 C2DE 1502, Indian: ABC1 193 C2DE 101, Pakistani: ABC1 164 C2DE 135, Black Caribbean: ABC1 124 C2DE 169, Black African: ABC1 137 C2DE 154)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Figure 10: Take-up of the internet by socio-economic group



IN1 – Does anyone in your household have access to the internet at home through a computer or laptop?
 Base: All adults aged 16+ (UK: ABC1 1388 C2DE 1502, Indian: ABC1 193 C2DE 101, Pakistani: ABC1 164 C2DE 135, Black Caribbean: ABC1 124 C2DE 169, Black African: ABC1 137 C2DE 154)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The influence of age and socio-economic group on media behaviour

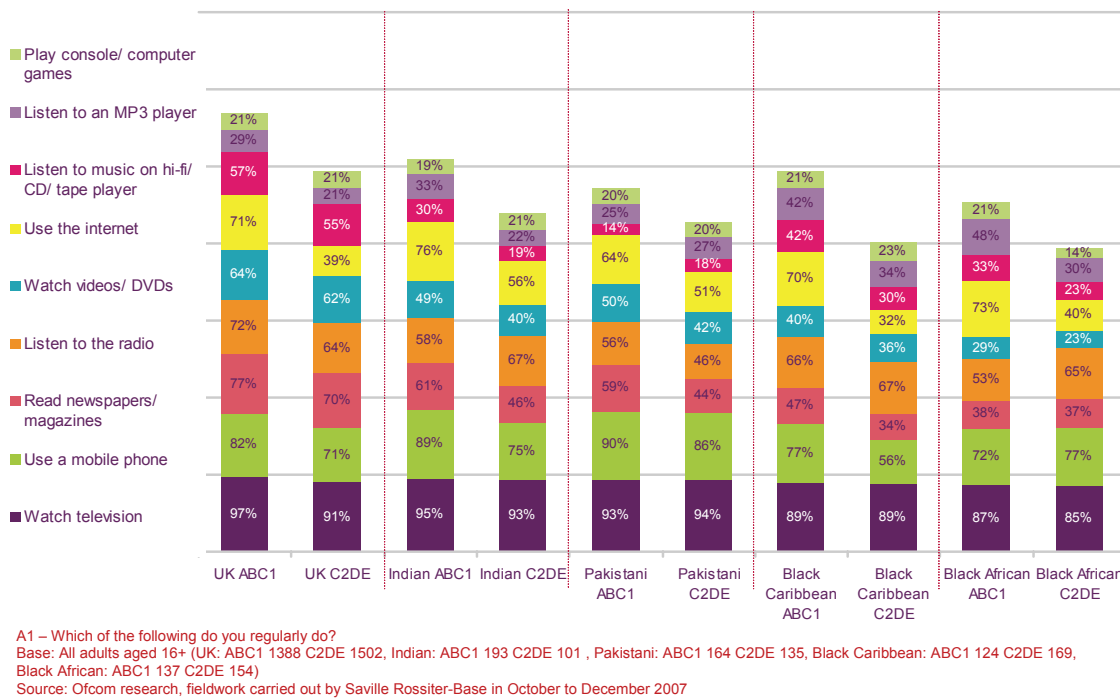
The higher range of media activities undertaken by the UK population in general is also seen when we look specifically at under-45s. The smaller range of media activities among EMGs is due to lower use of traditional media such as newspapers/magazines.

Figure 11: Breadth of media use, by age



UK ABC1s participate in a greater range of activities than ABC1s in each of the four EMGs. However, differences in the breadth of use of media activities between ABC1s and C2DEs within each of the ethnic minority communities do exist and these are influenced in most cases by great use of the mobile and the internet by ABC1s.

Figure 12: Breadth of media use, by socio-economic group



When people were asked which media activity they would miss the most, across each of the EMGs, regardless of age, respondents were significantly less likely to say they would miss

television the most, compared with UK adults. EMGs were significantly more likely to say they would miss a mobile phone.

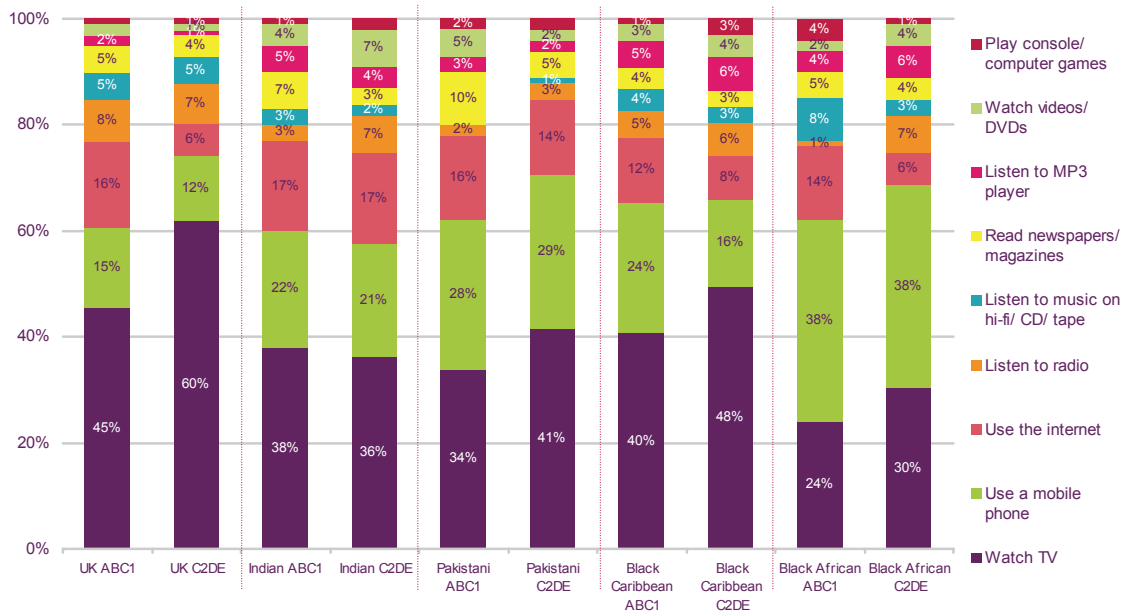
Figure 13: Media activity adults would miss the most, by age



A2 – Which one of these would you miss doing the most?
 Base: All adults aged 16-44 (1547 UK, 206 Indian under 45, 201 Pakistani under 45, 182 Black Caribbean under 45, 190 Black African under 45)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Within the UK ABC1s were less likely than C2DEs to say they would miss the television most. In comparison there were fewer differences in attitudes towards television among the difference socio-economic groups within the EMGs.

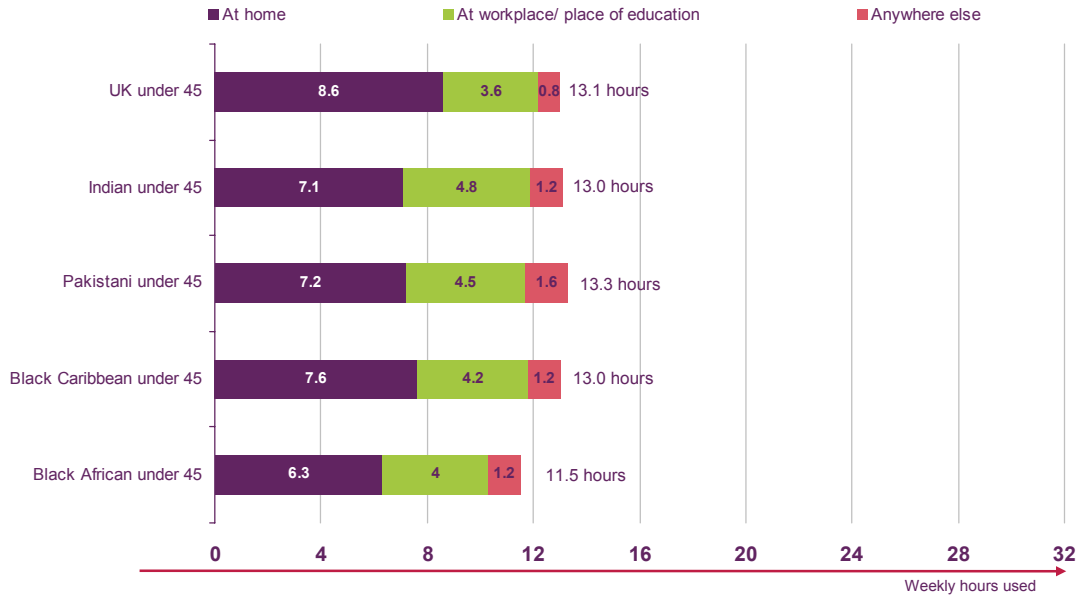
Figure 14: Media activity adults would miss the most, by socio-economic group



A2 – Which one of these would you miss doing the most?
 Base: All adults aged 16+ (UK: ABC1 1388 C2DE 1502, Indian: ABC1 193 C2DE 101, Pakistani: ABC1 164 C2DE 135, Black Caribbean: ABC1 124 C2DE 169, Black African: ABC1 137 C2DE 154)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Among under-45s, there is little difference between EMGs and the UK population in general in the number of hours they spend online per week. The exception is Black Africans under 45, who spend 11.5 hours, compared with the UK average of 13.1 hours.

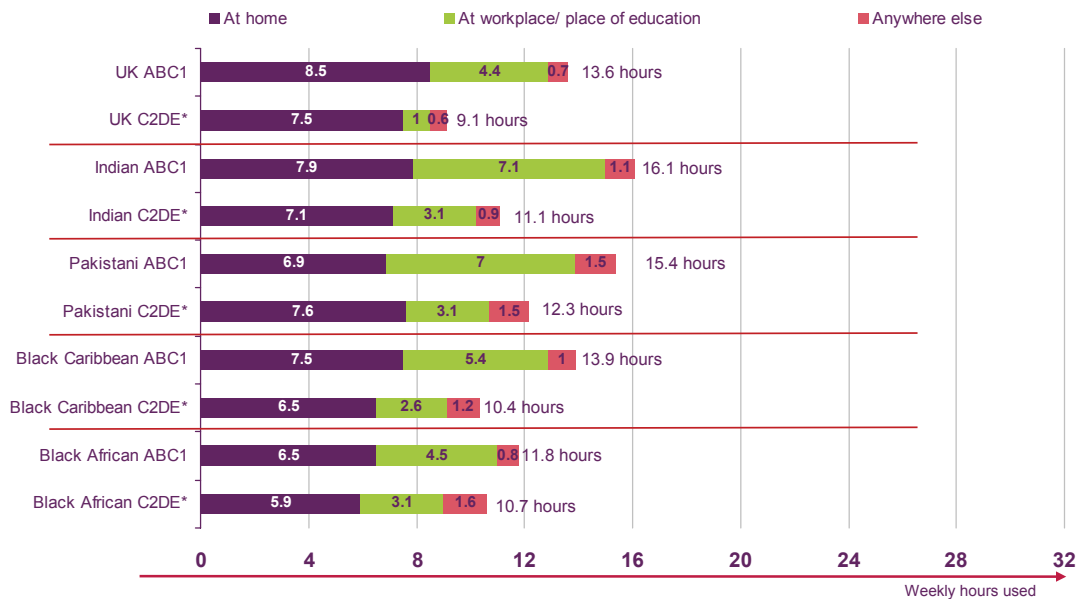
Figure 15: Length of time spend online, by age



IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
 Base: All adults aged 16-44 who use the internet at home or elsewhere (1142 UK under 45, 175 Indian under-45, 172 Pakistani under 45, 157 Black Caribbean under 45, 156 Black African under 45)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

Across the UK and the EMG populations, those in ABC1 households spend more time online than do people in C2DE households. The difference between the two socio-economic groups is smallest among Black African adults.

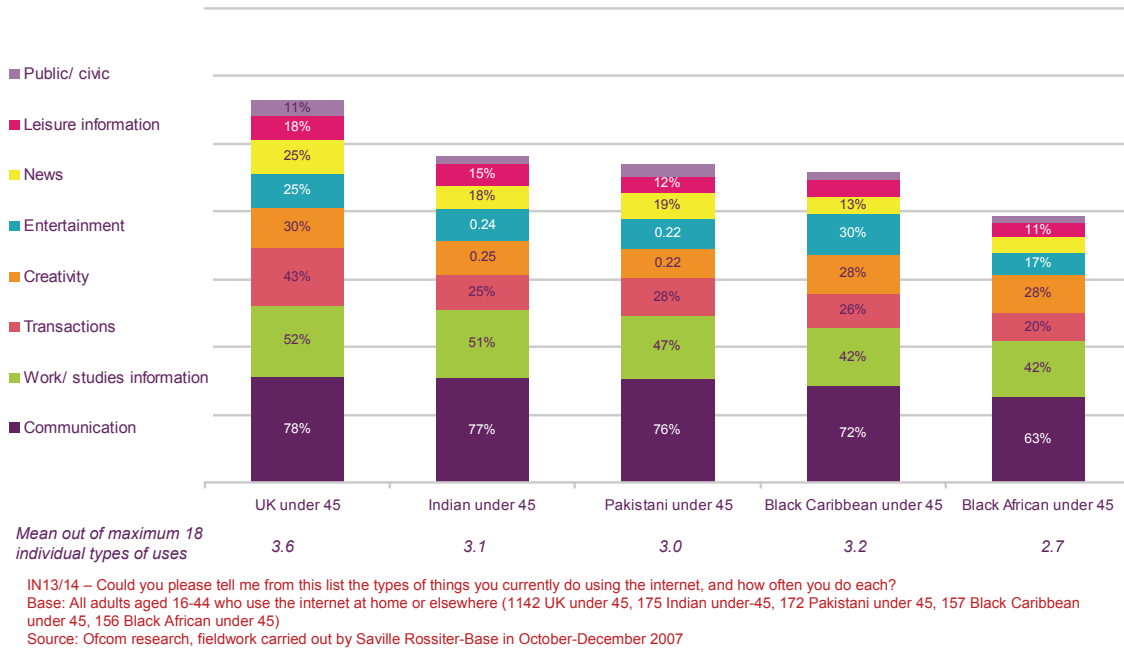
Figure 16: Length of time spend online, by socio-economic group



IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
 Base: All adults aged 16+ who use the internet at home or elsewhere (UK: ABC1 1036 C2DE 678, Indian: ABC1 167 C2DE 69*, Pakistani: ABC1 124 C2DE 75*, Black Caribbean: ABC1 113 C2DE 99*, Black African: ABC1 127 C2DE 84*) LOW BASE SIZE FOR C2DE.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

As with the trends in the total adult population, UK under-45s participate in a wider range of internet activities than similar age groups in each of the EMGs. Within the EMGs, Black African under-45s report the narrowest range of internet activities.

Figure 17: Breadth of internet use, by age



Across all groups, people in ABC1 households participate in a greater breadth of internet activities than do people in C2DE households.

Figure 18: Breadth of internet use, by socio-economic group



In general, EMGs are much more likely than UK adults to use another media device at the same time as watching television or using the internet. This trend is more pronounced

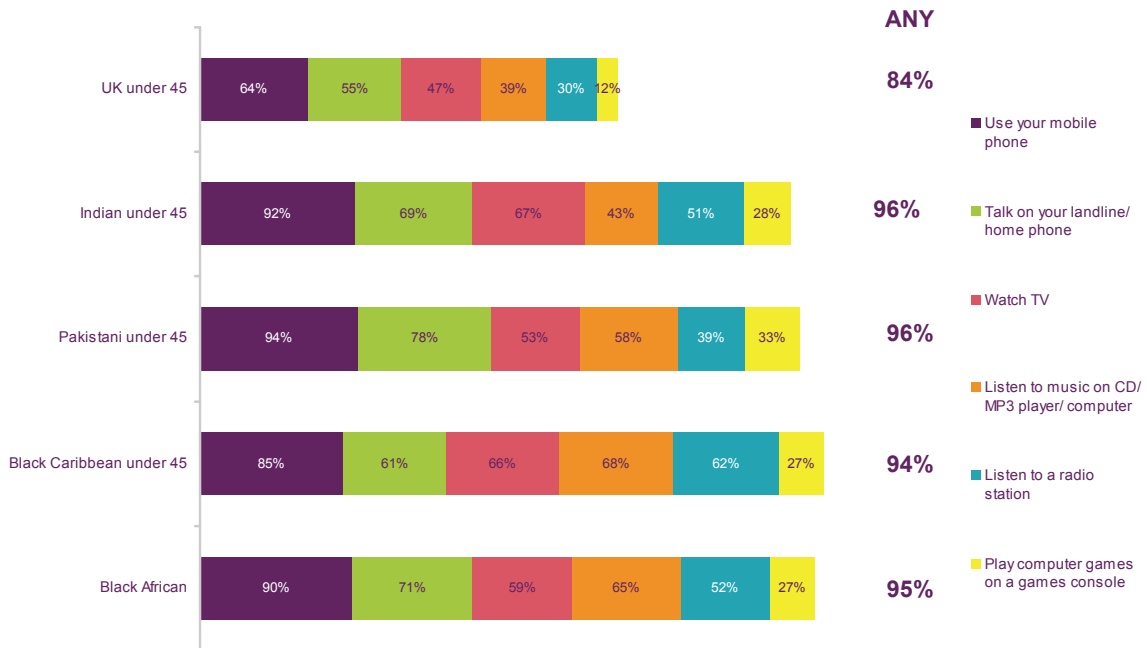
among the under-45s. Even when age and socio-economic group differences are taken into consideration, EMGs are still more likely to consume media simultaneously.

Figure 19: Use of other media at the same time as watching television



T3A-F – Do you ever watch TV at home and do these other things at the same time? Is that most times or sometimes when you watch TV?
 Base: All adults aged 16-44 with a TV in the household (1536 UK under 45, 200 Indian under-45, 195 Pakistani under 45, 179 Black Caribbean under 45, 187 Black African under 45)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Figure 20: Use of other media at the same time as using the internet



IN4A-F – Do you ever use the internet at home and do these other things at the same time? Is that most times or sometimes when you use the internet?
 Base: All adults aged 16-44 who use the internet at home (1142 UK under 45, 175 Indian under-45, 172 Pakistani under 45, 157 Black Caribbean under 45, 156 Black African under 45)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Section 4

Indian adults

4.1 Summary

Profile

The demographic profile of the Indian adult population differs from the UK average population and the other EMGs in this report across a number of variables:

- The Indian community has a younger profile; 67% of Indian adults are aged 16-44 years compared with 52% of the total UK population. They are, however, older than Pakistani and Black African adults; this reflects their longer migration history.
- Indian adults are more likely to live in an ABC1 household, compared with other EMGs, and represent the most affluent EMG in this report.
- Higher socio-economic group is correlated with working status, with nearly three-quarters (73%) of Indian adults reporting that they work either full-time or part-time, compared with 56% of the UK adult population as a whole.
- Linked to this, they are one of the groups least likely to be *not* working (11% compared to 14% among the UK population as a whole), along with Black African adults (9%). Indian adults are also the EMG in which the highest proportion of adults finish their education at the age of 21 or over (59%).
- Household size (3.2 compared to 3.0 the UK average) and the average number of children in the household (1.3 compared to the 1.0 UK average) are similar to the UK population as a whole.

It should be noted that the age profile of those who do *not* have children in the household is different between Indian adults and the UK population as a whole. In the Indian population those without children tend to be younger (pre-family) whereas households without children in the UK general population tend to be older (post-family). This is influenced by the higher proportion of under-45s, compared with the UK population in general. Therefore, in Indian households without children media literacy attitudes and behaviours tend to be those of younger people, whereas in UK households without children the media literacy attitudes and behaviours more closely reflect those of retired people.

Access

Table 1: Key access measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
**Multiple platform ownership	62%	65%	55%	62%	53%
Digital TV ownership	83%	89%	81%	82%	82%
Mobile phone take-up	90%	91%	88%	95%	85%
Internet take-up	76%	72%	64%	69%	62%
*Willingness to get internet	25%	35%	30%	30%	15%

** Home ownership of digital television, internet and mobile phone

* Base: All adults who do not have the internet at home

Three in five Indian adults live in a household with multiple media devices (defined as being digital television *and* the internet *and* a mobile phone). Indian adults who have these media devices tend to be under 45 years of age, ABC1, and male. Multimedia access is higher in Indian households than in the UK population as a whole.

Digital television ownership is at a similar level to the UK population as a whole, although Indian adults are more likely to have a cable or satellite subscription while the UK population as a whole is more likely to have Freeview. This is perhaps not surprising, because satellite and cable services offer an array of specialist and international channels, including foreign news¹⁰.

The vast majority of Indian adults personally use a mobile phone, and mobile phone use is more common among Indian adults under 45, ABC1s, and males. Personal ownership of mobile phones is also significantly higher than in the UK population in general.

Indian adults are more likely than the general UK population to live in a household that has the internet (75% compared to 62%). Internet take-up among the Indian community is likely to continue, with a quarter of Indian adults who do not currently have the internet at home saying they are likely to get it within the next 12 months. This compares to 15% among the UK population in general.

In terms of regular use, Indian adults are more likely to use the internet than are UK adults overall. In contrast, UK adults are more likely to regularly use more traditional media: reading newspapers or magazines, listening to radio, watching videos or DVDs, and listening to music on a hi-fi/ CD or tape player. The proportion of adults who regularly watch television does not differ between UK adults and Indian adults. Because of this lower use of more traditional media among Indian adults, overall Indian adults are using fewer media activities.

¹⁰ See Ofcom research report *New News, Future News* published 26 June 2007
<http://www.ofcom.org.uk/research/tv/reports/newnews>

Watching television is important, with 37% of Indian adults saying that television is the media device they would miss the most. However, compared to the UK average, a higher proportion of Indians say they would miss their mobile phone or the internet the most. This finding is in part due to the younger profile of the Indian community, compared to the UK as a whole, and the higher importance of mobiles and the internet to the under-45s.

Indians say they spend more time online in an average week than the UK average (13.5 hours compared to the UK average of 12.1 hours per week). While overall breadth of use of the internet does not differ from the UK average, Indian adults are more likely to use the internet to watch or download content; whether music, video clips or longer films and videos.

Reflecting the behaviour of younger people, Indian adults are more likely to use another media device while they are watching television or using the internet. Talking on the mobile or landline are the most common media activities that people do concurrently.

Understand

The table below summarises the percentage of owners or users who expressed interest in any one of a number of functions on each platform. The second half of the table summarises the proportion of adults who have concerns about the media covered in this report.

Table 2: Key understand measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
Interest in...					
digital TV functions	77%	79%	85%	91%	67%
digital radio functions	68%	72%	77%	78%	61%
internet functions	100%	98%	98%	100%	97%
mobile functions	98%	95%	98%	97%	94%
Concerns					
TV	65%	73%	73%	60%	55%
Radio	35%	34%	42%	32%	12%
Internet	65%	69%	64%	65%	63%
Mobile	57%	57%	57%	48%	34%
Gaming	37%	46%	41%	38%	30%

There is almost universal interest in internet functions and mobile functions among users of these devices in the Indian community, as is seen in the overall UK population. The majority

of Indians are also interested in using interactive digital television services. Their interest in digital television features is higher than for the total UK population.

For a variety of functions, Indian adults are more likely to be confident about carrying out a task, compared to the total UK population. However, some are interested but do not feel confident that they would be able to complete the task.

There is a mixed level of awareness of how media content is funded. Awareness of how television and commercial radio are funded is highest, while significantly fewer Indian adults are aware of how BBC radio stations, the BBC website and search engine websites are funded.

The picture is also mixed when looking at awareness of how media content is regulated. Two-thirds of Indian adults are aware that television programming is regulated and around half are aware that radio broadcasts are regulated. While there is a similar amount of confusion in both the Indian and the total UK population about whether the internet and gaming are regulated, there appears to be greater confusion over whether mobile phone content is regulated among Indian adults.

Some websites require users to give personal details in order to register or be able to use the site. With the exception of entering personal email addresses and mobile phone numbers Indians are less likely to say they are happy about doing this than are UK adults overall. Nearly nine in ten Indians say they check a website when they first visit it, compared with three-quarters in the overall UK population. The two most-mentioned checks are assessing the overall look and feel of the site and seeing how up to date the information is.

Indian adults are more likely to say they would not make a judgement about whether a website is secure, compared to the UK average (23% compared with 11%). Those who do make a judgment generally look for professional signs (such as a padlock symbol), use their instinct and/or peer signs. The higher proportion who say they do not look for secure signs may be influencing the reluctance of Indians to enter their personal details on websites.

A higher proportion of Indian adults than the UK average say that they are concerned about what is on television, and the radio, as well as concerns about mobile phones and electronic games. The higher level of mentions of concerns about television is driven by concern about offensive content, which is more likely to be mentioned by females. In contrast, concerns about the internet are more likely to be mentioned by ABC1s.

Concerns about offensive online content and risks to society are higher in the total UK population. Indians are more concerned about risks to finance and devices, personal privacy and poor quality content. Affordability is the key concern relating to mobile phones and is more likely to be expressed by Indians aged over 45.

Create

We have measured people's participation in creative activities by asking internet users how confident they feel about using creative functions online, and also whether they have any experience of or interest in creating online content. The creative activities we assessed were: *experience* of downloading different types of programming and audio content and *interest* in activities such as uploading photos, creating a social networking profile, contributing to blogs and creating videos that are later uploaded.

Table 3: Key create measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
Confidence in creating content	62%	64%	59%	62%	66%

Nearly two-thirds of Indian adults say they are confident about creating content, comparable to the general UK population. However, a higher proportion of Indian adults claim to have used an online creative function. Over half have uploaded photos onto the internet and one in three have made a short video that they have uploaded, and/or have a profile on a social networking site.

Indians are significantly more likely to have had experience of learning about media (43% compared with 27% in the UK population). Similar to the UK population overall, Indians prefer to learn by asking friends or family, through trial and error or by reading a manual. They are also more likely than others to say they prefer to learn by asking a supplier or going to a class.

4.2 Access

This section looks at take-up of digital television, internet and mobile phones, non-internet owners' intention to get the internet, what people use the internet for, the regular media activities of adults, the media activity that they would miss the most, the extent to which other media devices are used at the same time as watching television or using the internet, and people's main reasons for using media devices.

We make comparisons between the Indian adults surveyed in the Ofcom Ethnic Minority Groups Media Literacy Audit and a representative sample of UK adults surveyed in the Ofcom Adult Media Literacy Audit.

In most figures, data are shown for the total adult UK population and for the adult Indian population within the UK. The demographic breakdown (age, socio-economic group, gender and presence of children) is shown for the Indian adult population.

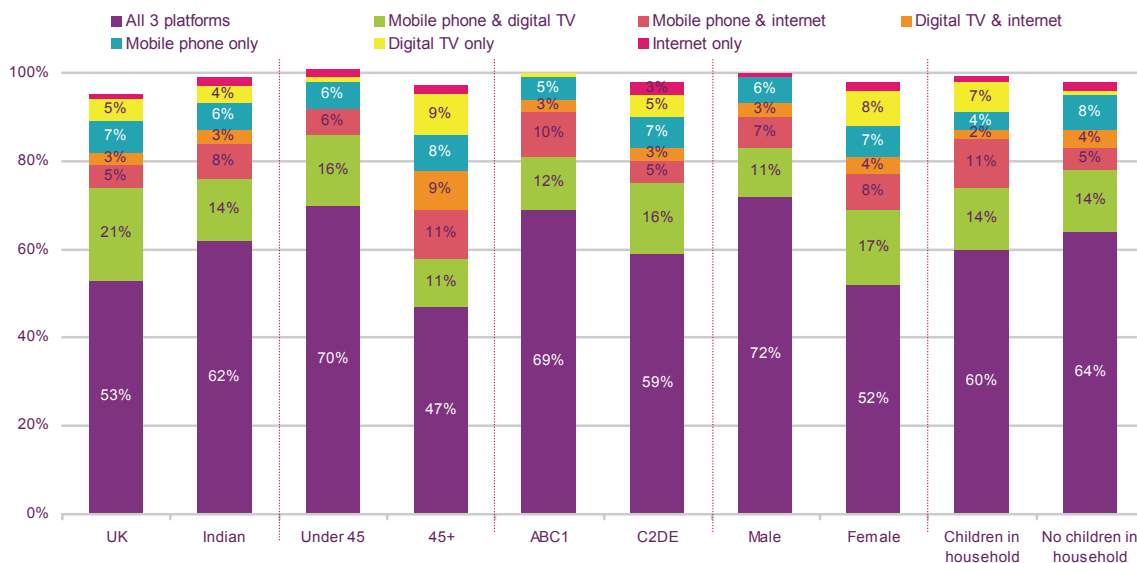
The percentage of Indian households with multiple media access is higher than in the general UK population, with three in five Indian adults living in households with multi-media devices

Figure 21 illustrates the proportion of households that have digital television, the internet and mobile phones.

Nearly nine in ten households (87%) have more than one core digital device (television, internet, mobile phone) and over three in five have all three media devices.

Within the Indian adult population, ownership of all three devices is more common among those aged under-45 and males. In contrast to the total UK population, where home ownership of the three devices does not differ by gender, Indian males are more likely than females to own all three devices. This gender difference is driven by higher ownership of mobile phones among males in the Indian community.

Figure 21: Multiple platform ownership: digital television, mobile phone and the internet



T1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5? Does anyone in your household have access to the internet at home through a computer or laptop? Do you personally use a mobile phone?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 193 Indian ABC1, 101 Indian C2DE, 147 Indian male, 153 Indian female, 121 Indian with children in household, 179 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The percentage of households that have all three multiple media devices is higher (62%) than among the general UK population (53%).

The majority of Indian adults have digital television

Four in five Indian adults have digital television at home (83%). The level of ownership is higher among adults aged under 45, but otherwise does not differ to any significant extent across the different demographic groups within the Indian adult population.

Figure 22: Home ownership of digital television



T1 - Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 193 Indian ABC1, 101 Indian C2DE, 147 Indian male, 153 Indian female, 121 Indian with children in household, 179 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The level of take-up among Indians and the UK population in general is broadly similar. This is also the case among the under-45s, with 87% among under-45 Indian adults and 89% among all under-45 UK adults.

There are differences between the ways Indian adults tend to receive their digital service and the UK average. Three-quarters (73%) of Indian adults receive their digital television through a satellite or cable service, compared with just over half (56%) of UK adults. As a consequence, take-up of Freeview is less common among Indian adults (12% compared to 30% of all UK adults). Satellite and cable services offer an array of specialist and international channels, including foreign news, which are known to be core drivers of take-up among EMGs¹¹.

Mobile phone ownership is nearing saturation

Nine in ten (90%) Indians personally use a mobile phone.

Mobile phone use is more common among Indian adults under 45, ABC1s and males.

¹¹ See Ofcom research report *New News, Future News* published 26 June 2007 <http://www.ofcom.org.uk/research/tv/reports/newnews/>

Figure 23: Take-up of mobile phone



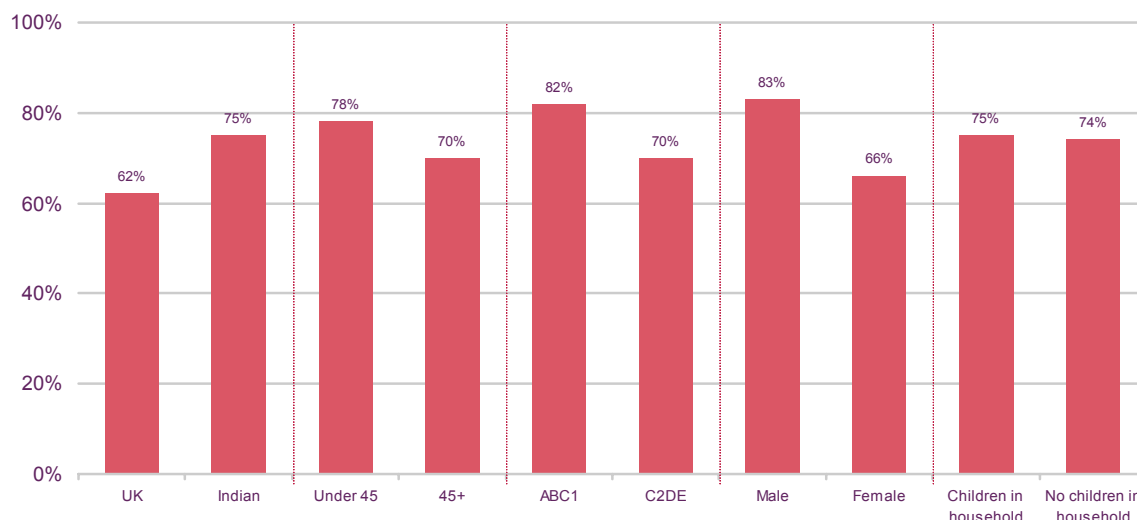
M1 – Do you personally use a mobile phone?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 193 Indian ABC1, 101 Indian C2DE, 147 Indian male, 153 Indian female, 121 Indian with children in household, 179 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Personal ownership of mobile phones is significantly higher than the UK population average (85%). The higher level of take-up is influenced by the younger age profile among the Indian community, as take-up of mobile phones among adults under 45 is at similar levels for Indian adults (97%) and all UK adults (96%).

Internet penetration is higher among the Indian population than the UK as a whole, with over three-quarters of Indian adults living in a house with access

Three-quarters of Indian adults have the internet at home (75%). There are demographic variations; take-up of the internet is more common among Indian adults in ABC1 socio-economic groups and males.

Figure 24: Home ownership of internet services



IN1 – Does anyone in your household have access to the internet at home through a computer or laptop?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 193 Indian ABC1, 101 Indian C2DE, 147 Indian male, 153 Indian female, 121 Indian with children in household, 179 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Take-up is higher among Indians than the UK average (where three in five live in a household which has the internet). Home access to the internet among under-45s is higher for Indians (78%) than for UK adults of the same age (74%) suggesting that there is greater interest among this group.

Nine in ten (87%) Indian adults with the internet at home have a broadband connection. Take-up of broadband among households with the internet does not vary to any significant extent from the UK average (92%).

There is potential for further increases in internet penetration in Indian households

Non-ownership of the internet accounts for 25% of Indian adults, and is more common among those aged 45 and over (30%); C2DE socio-economic groups (30%); and females (34%).

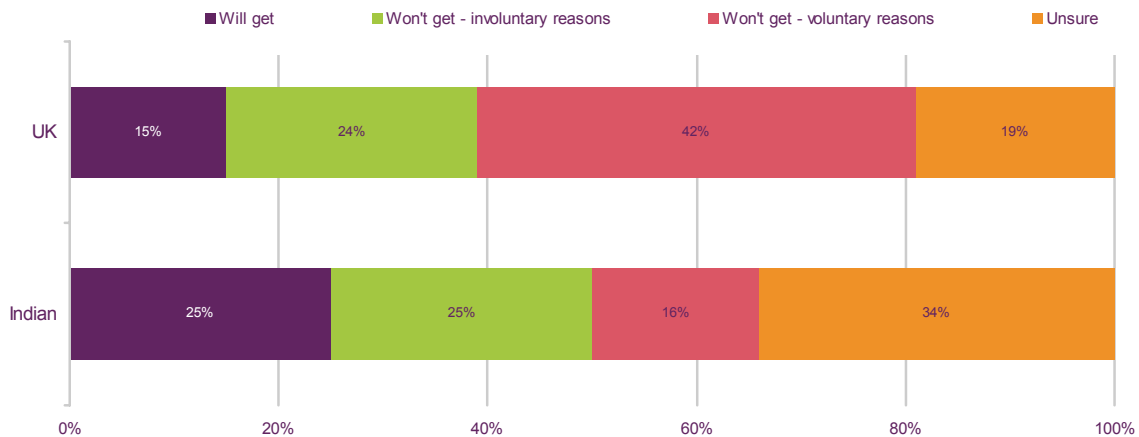
When those who do not currently have access to the internet at home were asked whether they intended to get the internet at home in the next year, a quarter of the 25% expressed interest in going online. This suggests there is potential for further increases in internet penetration in Indian households.

Two in five of those not currently connected at home said they had no intention of getting the internet in the next 12 months. Reasons given for not intending to get internet access were split between voluntary (25%) (not interested/ no need) and involuntary (16%) (too expensive/ do not know how to use it/ do not have a computer/ too difficult to use) with a slight skew towards involuntary reasons.

One in three had not made up their minds and were unsure whether they would be getting the internet or not.

Note: The base size for those without internet access at home among Indian adults is low, due to higher take-up of the internet, and so the data in Figure 25 are indicative only.

Figure 25: Intention to get the internet in the home



IN18/ IN20 – Can you tell me if you intend to get internet access at home in the next year or so?/ And can you tell me why that is?
 Base: All adults aged 16+ who do not have internet access at home (1222 UK, 66 Indian) NB LOW BASE SIZE FOR INDIAN ADULTS
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

There is a higher level of intention to get connected to the internet in the next 12 months among Indian households (25%) than UK households in general (15%).

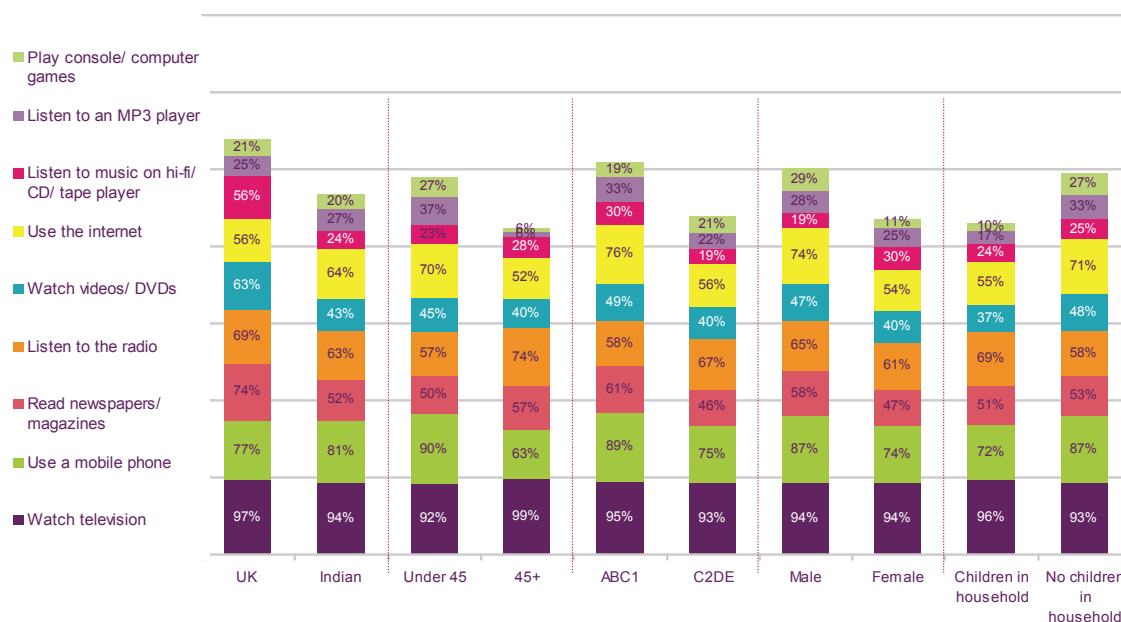
The barriers to internet connection for Indian households are more likely to be issues such as affordability, while the most-mentioned barriers among the UK population are voluntary, such as a perceived lack of need for the internet.

Watching television is still the most common media activity

Figure 26 shows which media activities people participate in regularly.

The most common media activities are watching television and using a mobile phone, while using the internet and listening to the radio are also popular. Regular use of electronic media such as mobile phones and the internet tends to be more evident in the Indian population among the under-45s, ABC1s, males and those with no children in the household. Use of MP3 players is more common among the under-45s. As a result, these groups have a broader range of media activities.

Figure 26: Regular media activities



A1 – Which of the following do you regularly do?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 193 Indian ABC1, 101 Indian C2DE, 147 Indian male, 153 Indian female, 121 Indian with children in household, 179 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

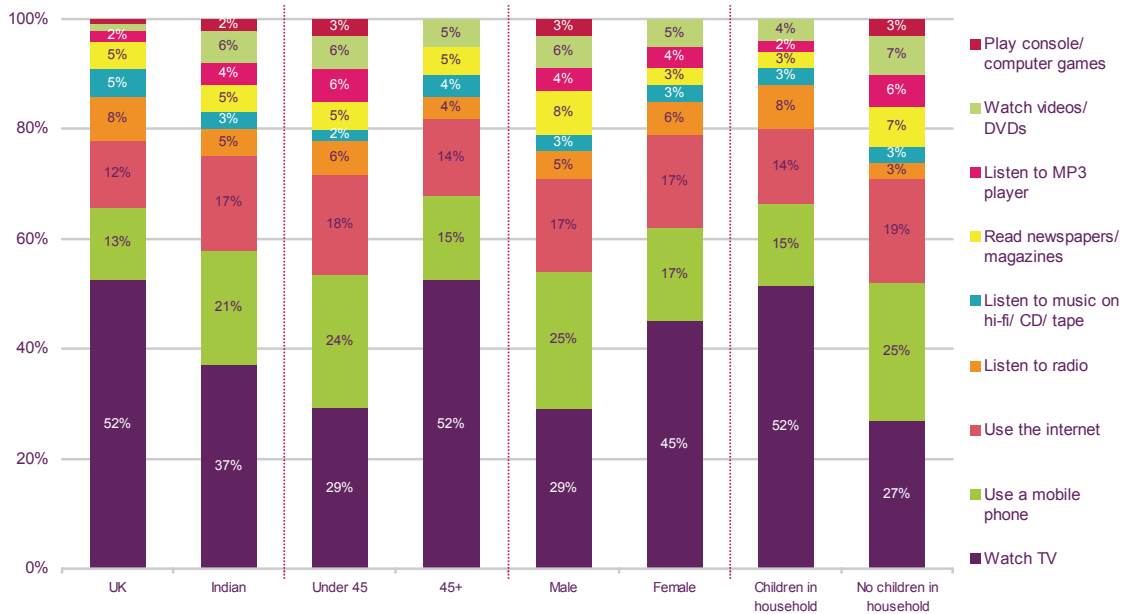
Indian adults are more likely to use the internet regularly than UK adults overall. In contrast, UK adults are more likely to regularly use the more traditional media: reading newspapers or magazines, listening to radio, watching videos or DVDs, and listening to music on a hi-fi/ CD or tape player. The proportions regularly watching television do not differ between UK adults and Indian adults. Because of this lower use of the more traditional media among Indian adults, it appears that overall Indian adults are using fewer media activities.

Mobile phones are challenging television as the medium that under-45s would miss the most

Watching television is most frequently mentioned by Indian adults as the medium they would miss the most, followed by the mobile phone.

There are some interesting age differences observed on this measure. Over-44s would miss the television the most (similar to the UK population as a whole). Indian adults under 45 are less likely to say they would miss watching television, and more likely to say they would miss using a mobile.

Figure 27: Most-missed media activity



A2 – Which one of these would you miss doing the most?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 147 Indian male, 153 Indian female, 121 Indian with children in household, 179 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Although Indian adults are more likely to say they would miss television the most compared with other devices, fewer say this than in the UK population as a whole. The importance of mobile phones is evident, and Indian adults in general are more likely to say they would miss their mobile than UK adults in total.

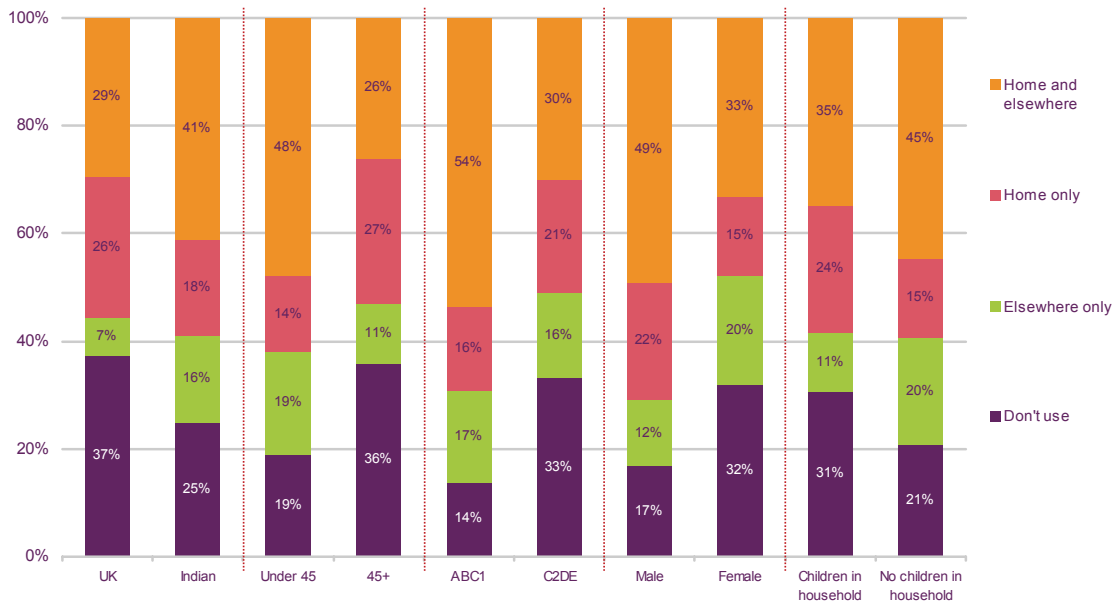
Indian adults are more likely than others to use the internet at home and elsewhere

Three in four (75%) Indian adults use the internet, higher than the UK population as a whole (62%). Internet users, whether Indian adults, or within the total UK population, are more likely to be under 45 and living in an ABC1 household. As mentioned earlier, among Indian adults, males are more likely to use the internet than females.

Among Indian adults who use the internet, around three in five use it at home (59%) or outside the home (57%).

The majority of internet use outside the home is accounted for by use in the workplace. Use of the internet in general is more common for Indian adults aged under 45, those in ABC1 socio-economic groups, males, and those without children in the household.

Figure 28: Where the internet is used



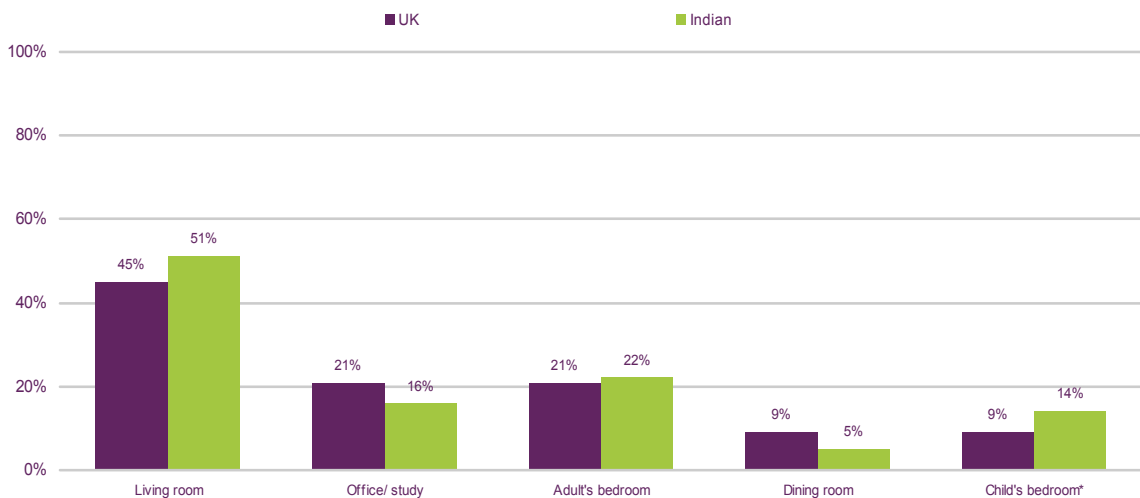
IN1/ IN5 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 193 Indian ABC1, 101 Indian C2DE, 147 Indian male, 153 Indian female, 121 Indian with children in household, 179 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Use of the internet at home or elsewhere is higher among the Indian community than in the UK in general, as might be expected, given the higher levels of internet access in Indian households.

Among adults under 45, a similar proportion of Indians use the internet as UK adults (81% compared with 79%). However, Indians are more likely to use the internet outside the home (67% compared with 50%), and less likely to use the internet at home (62% compared with 70%).

Those Indian adults with internet access at home tend to have PCs with internet access in just one room - the most common location is the living room.

Figure 29: Location of home computer with internet access



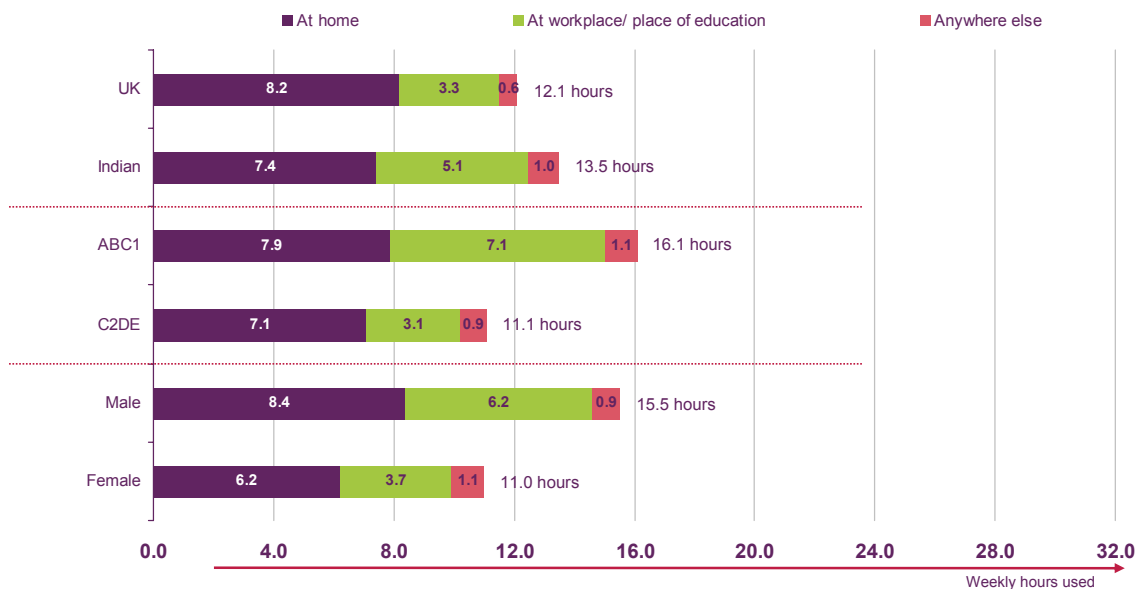
IN2 – Where are the computers in your home?
 Base: Adults aged 16+ with internet access at home (1683 UK, 234 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007
 * Based on those who have children in the household (1002 UK adults, 95 Indian adults)

Indian internet users spend more time online than the UK average

Indian adults use the internet, on average, for 13.5 hours per week, which is higher than the UK average of 12.1 hours. The higher overall volume of use among Indian adults takes place at the workplace or place of education. This is not surprising considering a high proportion of Indian adults are in tertiary education¹² and more are in work than among the UK population as a whole.

Although Indian adults aged under 45 are more likely than the over 45s to have the internet at home, there is no significant difference in the number of hours per week they spend online. There are, however, differences among other demographic sub-groups, with a higher volume of use among Indian adults in ABC1 socio-economic groups and males. Again, it is use outside the home rather than in the home that stands out for these higher-volume users.

Figure 30: Volume of internet use, per week



IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 240 Indian, 167 Indian ABC1, 69 Indian C2DE, 128 Indian male, 112 Indian female)
 NB LOW BASE SIZES FOR INDIAN C2DE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

Indian adults use the internet mainly for communicating and finding information for work or study

All adults who use the internet (regardless of where they use it) were prompted with a list of 18 possible uses of the internet and were asked to say, for each one, whether this was something they did, and how often.

The 18 possible uses have been grouped into eight types, in order to assess ‘breadth of use’ of the internet; the extent to which they use the internet for a variety of purposes:

- communication - uses such as sending or receiving email, using online chat rooms or instant messaging (IM);
- work/ studies information - finding information online for work or for studies;
- transactions - banking or paying bills, using auction sites or buying things online;

¹² Source: Annual Population Survey 2004

- news - looking at news websites;
- creativity - looking at social networking sites (such as MySpace, Bebo, and Facebook) or maintaining a website or weblog;
- entertainment - listening to radio or playing games online or looking at adult-only websites;
- leisure information - finding information for leisure time including cinema and live music or information for booking a holiday; and
- public/ civic - finding out about public services or looking at political/ campaign/ issues websites.

Figure 31 shows the proportion of internet users who use the internet for each of these activities at least once a week. The average of the original 18 possible uses is also shown.

Indian internet users are carrying out a number of activities online and say they do an average of 3.3 activities per week. The two most-mentioned activities are communicating and finding work/ studies information.

Within the Indian population a broader use of the internet is evident for those in the ABC1 socio-economic group, males and those without children in the household.

Figure 31: Internet activities carried out at least once a week



IN13/14 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each?
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 240 Indian, 175 Indian under 45, 65 Indian 45+, 167 Indian ABC1, 69 Indian C2DE, 128 Indian male, 112 Indian female, 90 Indian with children in household, 150 Indian with no children in household) NB LOW BASE SIZES FOR INDIAN 45+, C2DE, WITH CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

Indian adults and the UK population as a whole use the internet for a similar breadth of activities. Although there are few differences in the types of activities internet users do, Indian adults are more likely to use the internet for information for work or studies, but less likely to use it for transactions. Unlike the UK population, under-45s do not make broader use of the internet than over-44s.

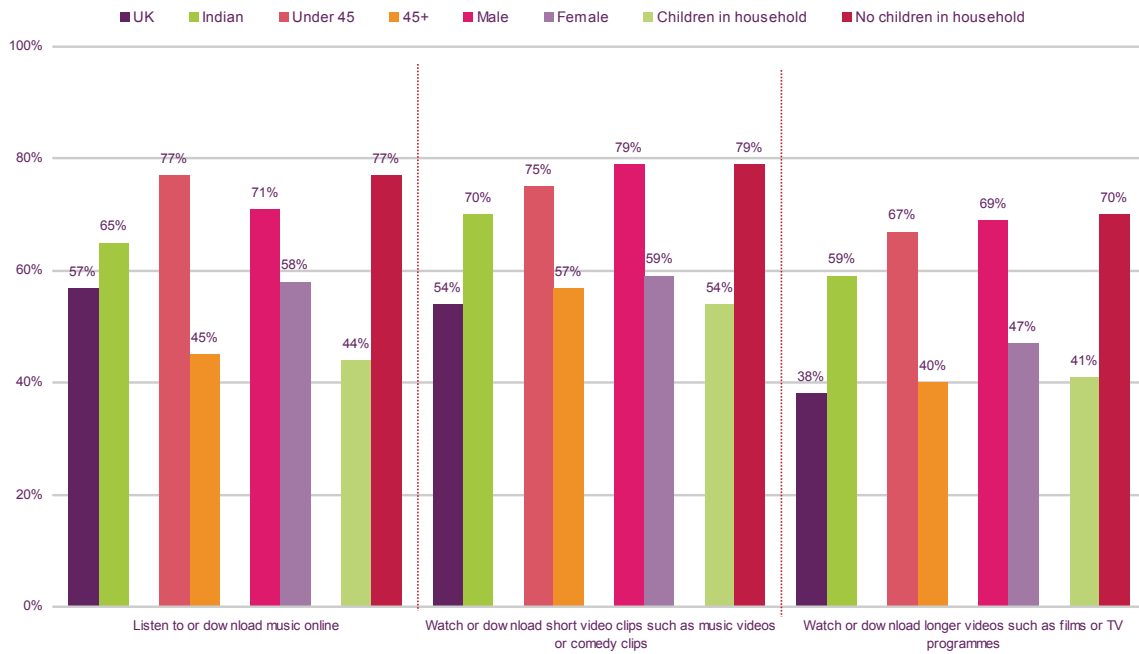
Within the transactions category, Indian adults are less likely to use the internet on a weekly basis for banking and paying bills (10% compared with 27%) or to buy things online at least weekly (10% compared with 18%).

A large majority download or watch entertainment content online

Indian adults are also more likely than the UK population as a whole to report using the internet to watch or download content; whether music, video clips or longer videos, as shown in Figure 32. Among the Indian community using the internet in this way is more common among under-45s, males, and those without children in the household.

Among internet users aged under 45, using the internet to watch video content is more common in the Indian population than in the UK population. Therefore, the higher use of accessing online content is not just related to age but also to cultural and attitudinal factors.

Figure 32: Using the internet to watch or download video content



IN15A-C – I am now going to read out some things that can be done on the internet, and would like to know how often, if at all, you do each one
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 240 Indian, 175 Indian under 45, 65 Indian 45+, 128 Indian male, 112 Indian female, 90 Indian with children in household, 150 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+, THOSE WITH CHILDREN IN THE HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Although generally fewer people in the UK overall download content compared with Indian adults, the greatest difference between the two populations relates to watching longer videos such as films or television programmes online. However, watching longer videos is still the least popular of these activities, both for Indian adults and for the UK population as a whole.

Around nine in ten Indian adults use another device while watching television or using the internet

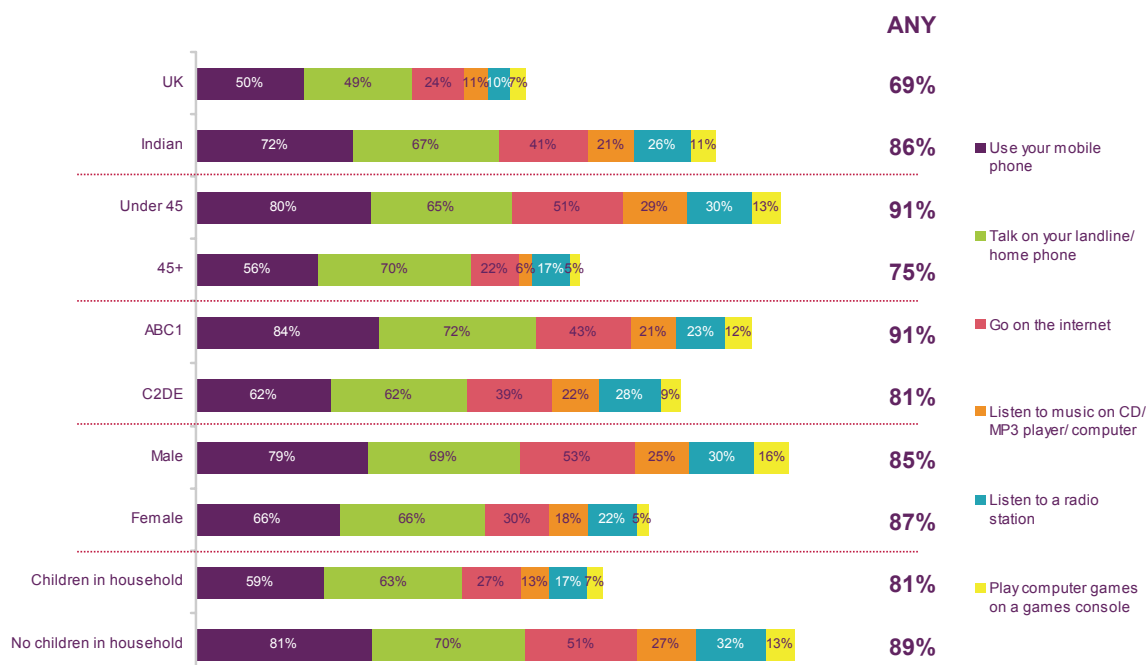
We asked people if they ever use another media device while they are watching the television or using the internet.

Around nine in ten (86%) Indian adults have ever used other media device while watching television; this is most likely to be talking on the phone or using the internet.

It is clear from Figure 33 that using another media device while watching television is more common among Indians under 45, with 91% saying they do this.

Using another media device while watching television is also more common among ABC1s, males and those without children in the household.

Figure 33: Using another device while watching television



T3A-F – Do you ever watch TV at home and do these other things at the same time? Is that most times or sometimes when you watch TV?
 Base: All adults aged 16+ with a TV in the household (2887 UK, 294 Indian, 200 Indian under 45, 94 Indian 45+, 191 Indian ABC1, 97 Indian C2DE, 142 Indian male, 152 Indian female, 121 Indian with children in household, 173 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+, C2DE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Indian adults are more likely to use multiple devices while watching television (86%) compared to UK adults (69%). So while Indian adults are as likely as UK adults to watch television as a regular media activity, they are more likely to use other media at the same time.

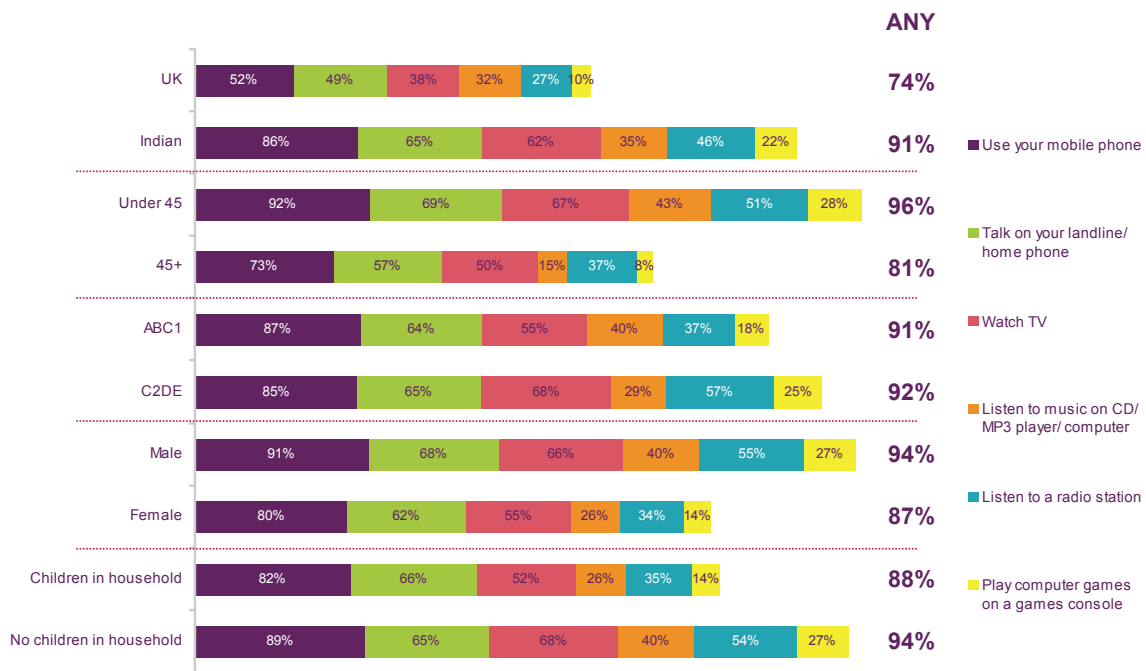
Other research conducted by Ofcom¹³ showed that Indian adults are more likely than UK adults overall to have one television set in the household rather than multiple sets (55% compared with 30%). Having one television set in the household may have an impact on using other media devices at the same time as watching television.

Nine in ten (91%) Indian adults say they have used other media devices while using the internet.

Using other media devices while using the internet is more common among Indian adults under 45. It is also more common among males and those without children in the household, but does not differ particularly across the socio-economic groups.

¹³ Communications Market Special Report – Ethnic minority groups and communications services, June 2007

Figure 34: Using another device while using the internet



IN4A-F – Do you ever use the internet at home and do these other things at the same time? Is that most times or sometimes when you use the internet?
 Base: All adults aged 16+ who use the internet at home (1514 UK, 191 Indian, 138 Indian under 45, 53 Indian 45+, 135 Indian ABC1, 53 Indian C2DE, 107 Indian male, 84 Indian female, 76 Indian with children in household, 115 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+, C2DE, FEMALE, WITH CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Indian adults are also more likely than UK adults to use other media while using the internet, in particular using a mobile or landline phone or watching television. Therefore, in addition to Indian adults being more likely to use the internet than UK adults, they are also more likely to use other media at the same time

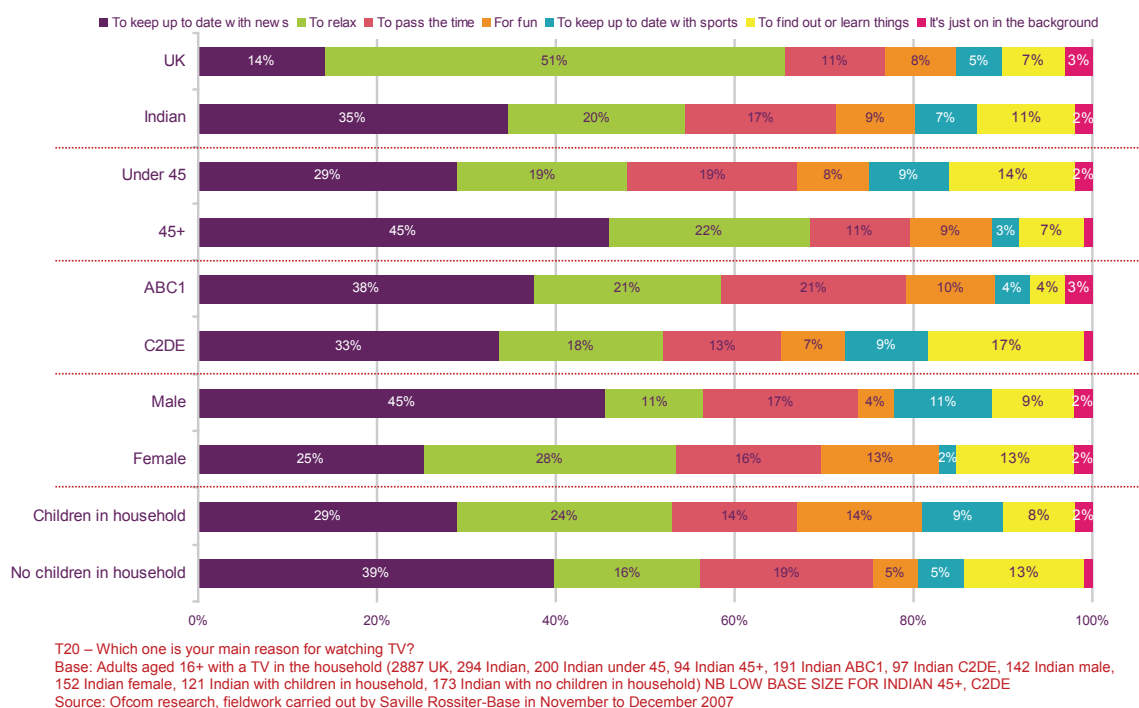
Even among under-45s who are at the forefront of using multiple devices, Indian under 45 are more likely to do this than the same age group in the overall UK population.

Keeping up to date with the news is a more common reason for watching television among Indian adults than among the UK population as a whole

Indian adults give a diverse range of main reasons for watching television. The most common reasons are to keep up to date with the news, followed by relaxation and passing the time.

Responses differ to some extent by age, with Indian adults over 45 more likely to say they watch mainly to keep up with news. People from C2DE households are more likely to say they watch television to find out or learn new things than those from ABC1 households.

Figure 35: Main reason for watching television



Compared to the UK population as a whole, Indian adults give a more diverse range of main reasons for watching television. Indian adults under 45 are more likely to watch mainly to keep up with news (29%) than under-45s in the UK in general (8%).

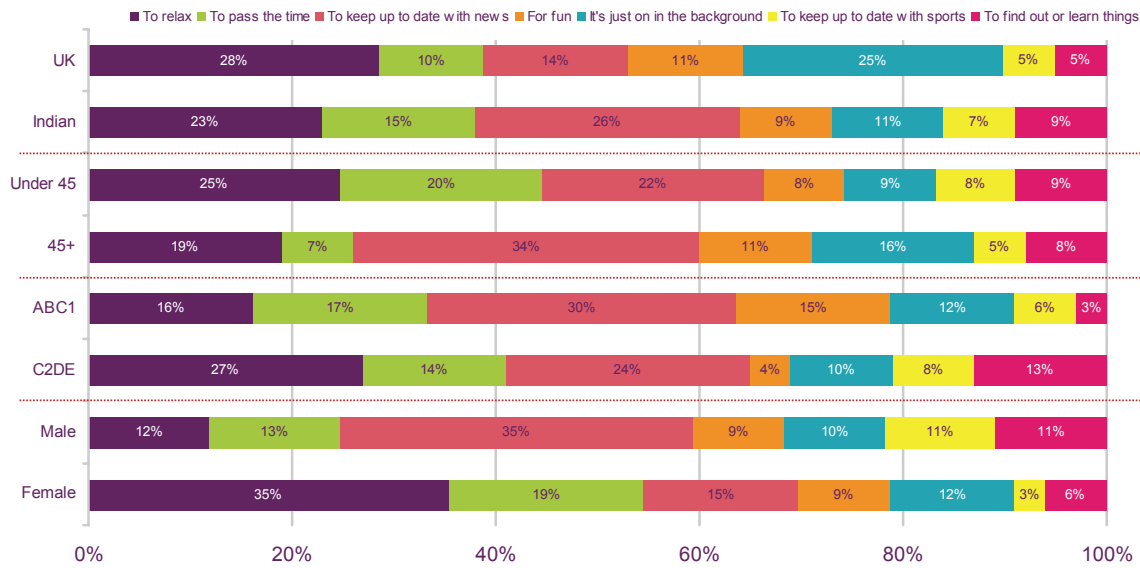
Radio is also used more commonly than average to keep up to date with the news

Just over two-thirds (70%) of Indian adults listen to the radio at home, mainly to digital radio. One in five listen to the radio through a DAB radio set (22%) or through their digital television (16%) and one in ten (11%) listen to radio via the internet. Nearly one in three listen to AM/FM radio.

As shown in Figure 36, they give a diverse range of main reasons for listening to the radio. The two most mentioned are to keep up to date with news (26%) and to relax (23%). Responses differ to some extent by age, with under-45s more likely to listen to the radio to pass the time.

Females and those from C2DE households say they mainly listen to the radio to relax, while males listen to the radio mainly to keep up to date with news.

Figure 36: Main reason for listening to radio



R14 – Which one is your main reason for listening to radio?
 Base: Adults aged 16+ who listen to radio at home (2043 UK, 204 Indian, 138 Indian under 45, 66 Indian 45+, 125 Indian ABC1, 75 Indian C2DE, 100 Indian male, 100 Indian female) NB LOW BASE SIZE FOR INDIAN 45+, C2DE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

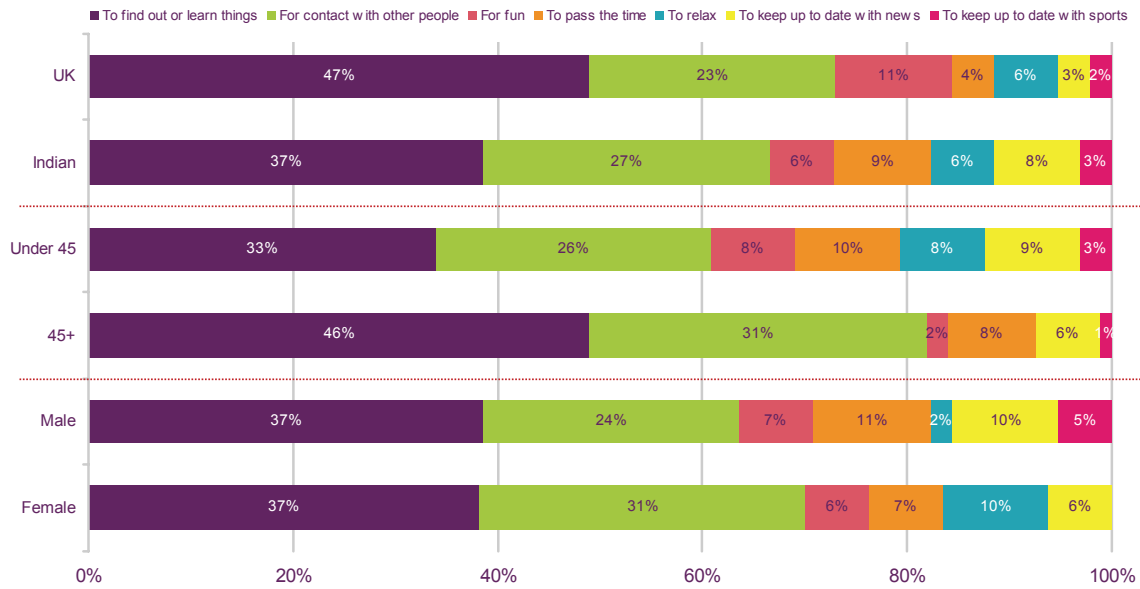
In comparison to the UK as a whole, Indian adults are more likely say they listen to radio mainly to keep up with news or to pass the time, and less likely to say they listen to relax or just to have the radio on in the background. Compared to UK adults under 45, Indian adults in this age group are more likely to listen mainly to keep up with news (22% compared with 10%).

The main reasons for using the internet are to source information /learn new things or as a method to contact others

The two most popular main reasons for using the internet among Indian adults are to find out or learn things, and for contact with other people.

Base sizes for internet users over 45 are small and so data are indicative, but it appears that older internet users are more likely to use the internet for contact with other people. Under-45s appear to have more diverse reasons for using the internet compared to Indian adults over 45.

Figure 37: Main reason for using the internet



IN51 – Which one is your main reason for using the internet?
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 240 Indian, 175 Indian under 45, 65 Indian 45+, 128 Indian male, 112 Indian female)
 NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

4.3 Understand

This section looks at interest in, and confidence in using, digital services, attitudes towards the role of media and platform content, trust in television and internet content, checks and judgements made when visiting new websites, and concerns about platforms.

In general, interest and confidence in digital services is higher among Indian adults

Those with a digital television service at home (83%) were prompted with four functions available through digital television. For each function, they were asked to say if this was something they were interested in. Those interested in particular functions were then asked to say whether they could do the task with confidence. Figure 38 splits all digital television owners into one of three groups for each of the four functions: those who are not interested, those who are interested and can do it confidently, and those who are interested but cannot do it confidently.

The majority of Indian adults are interested in each of the four digital television functions we asked about. The functions of most interest are using the interactive button on the remote control (70%) and setting up a menu of favourite channels (68%). Around three in five are interested in selecting different viewing angles or matches for sports events (58%) and in using a PIN to block access to certain channels or programmes (61%).

Most people who are interested in these functions also express confidence about using them. Across the four functions a higher proportion say they are interested but not confident about blocking access to certain programmes or channels using a PIN.

Figure 38: Interest and confidence in using digital television services



T4 – I'm going to read out some different types of things you can do with some types of digital television, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ with multichannel TV (2351 UK, 252 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

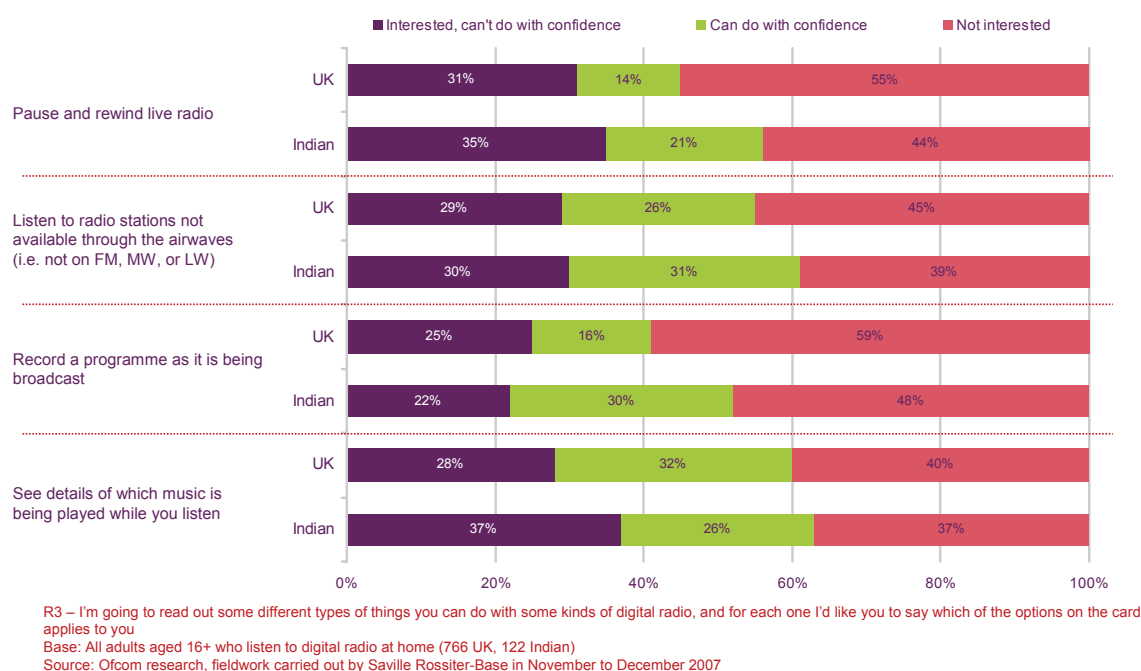
Levels of interest in these functions are higher than among UK adults in general. Despite higher levels of interest and subsequent higher levels of confidence, a similar proportion say they are interested but can't use the function with confidence.

Interest in DAB radio functions is lower than for other media devices

The proportion of Indian adults who are interested in DAB radio functions is lower than the proportion that expressed interest in other platforms, although some level of interest is expressed by at least half of the Indian population. The functions we assessed when analysing interest and confidence in using digital radio functions were available only on DAB¹⁴ radio sets (not through the internet or digital television, which can also be used to receive digital radio), and may not be uniformly available on all DAB radio sets.

Levels of confidence are also lower for DAB radio than for other media, in particular pausing and rewinding live radio, and seeing details of which music is being played.

Figure 39: Interest and confidence in using DAB radio sets



Interest in two of the four functions is higher among Indian adults who listen to digital radio than among the general UK population: pausing and rewinding live radio; and recording a programme as it is being broadcast.

Indian adults have higher levels of interest in internet functions, compared with other platforms, and relatively high levels of confidence for many activities

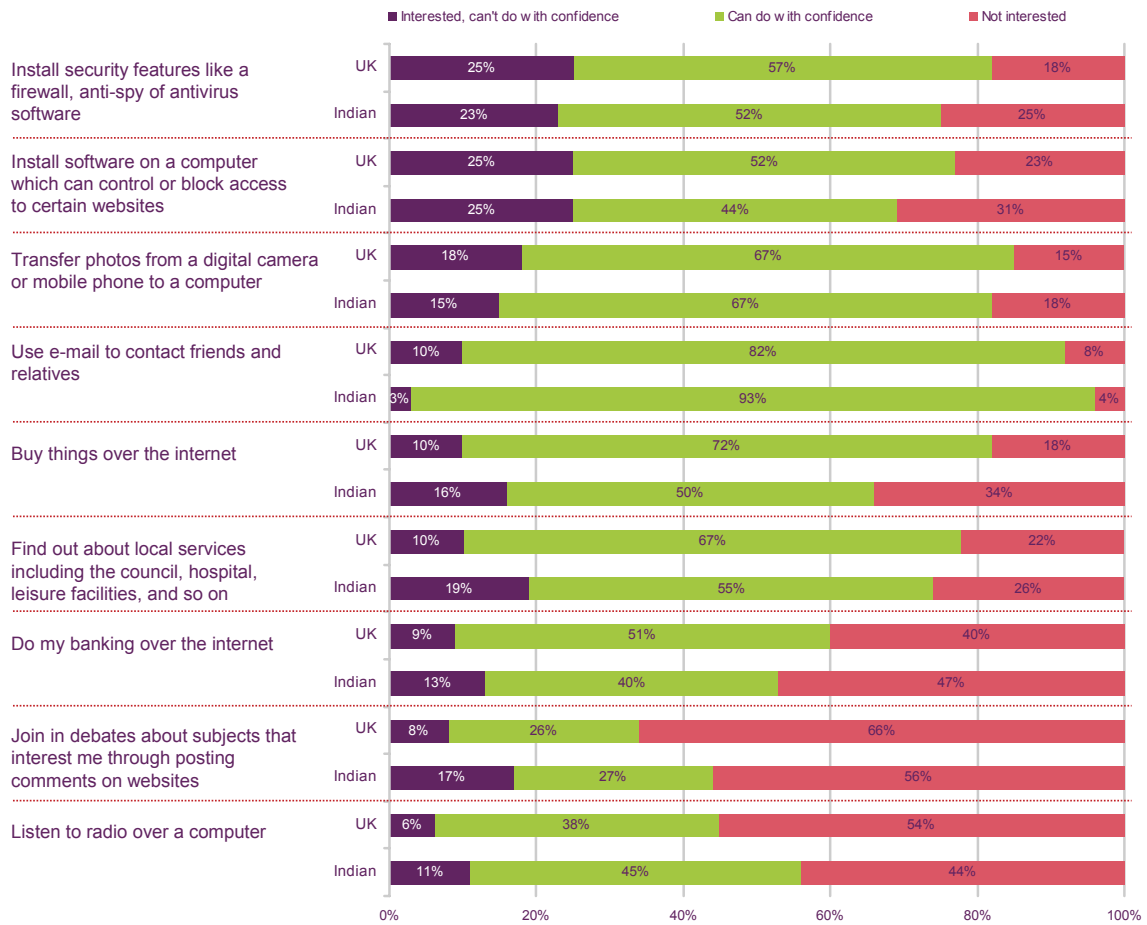
Those who use the internet at home or elsewhere (75%) were prompted with nine tasks or functions that they could carry out on the internet. At least half of Indian adults were interested in eight of the nine tasks or functions.

Indian adults showed the most interest in using email and transferring digital photos to a computer and were least interested in joining debates through posting notes or comments on websites.

Installing software or security features are the functions that Indian adults are least confident with.

¹⁴ DAB stands for Digital Audio Broadcasting

Figure 40: Interest and confidence in using internet functions



IN7A-I – Please look at the options shown on this card. I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I'd like you to say which of the options on the card applies to you.
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 240 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

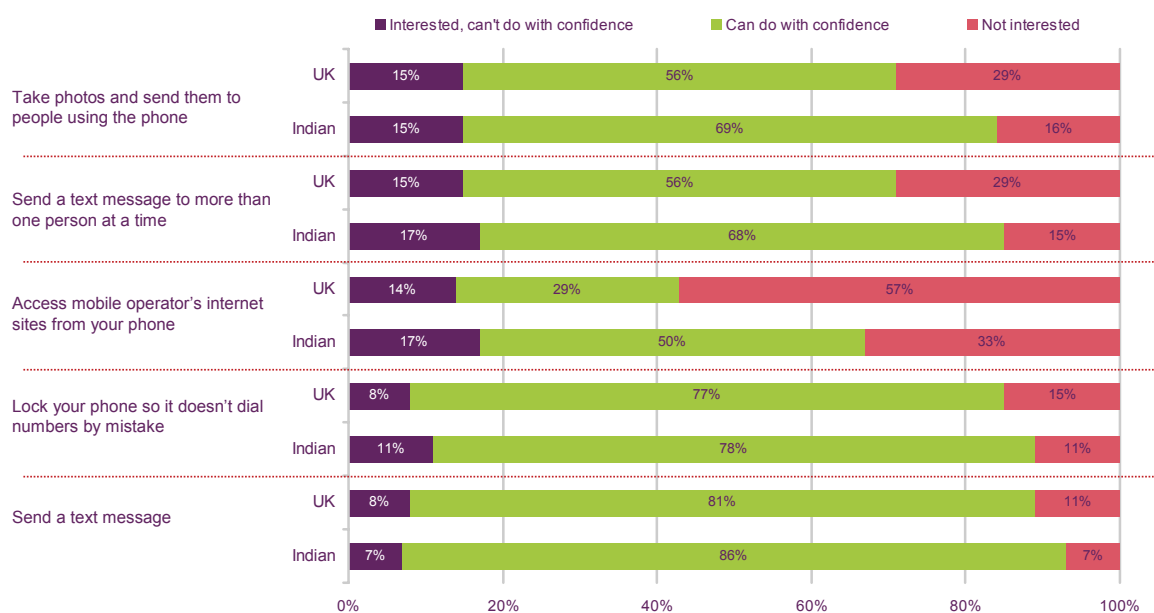
There are some differences between features of interest to Indian adults and to the UK population as a whole. Indian adults are more interested in using email to contact friends and relatives, as well as the more minority interest functions - listening to radio over a computer and joining in debates by posting comments online. By contrast, UK adults in general are more interested in buying things online, installing security features and installing software to control or block access to websites. The lower level of interest shown by Indian adults in buying things online is consistent with their lower use of the internet to conduct transactions, compared with UK adults as a whole.

There are high levels of interest in mobile phone functions

The majority of Indian adult mobile phone users expressed an interest in each of the mobile phone functions. Interest is higher in each of the four interactive functions, in particular accessing internet sites from a mobile phone.

Most people interested in a function also expressed confidence in using it. No particular function stands out as having a higher proportion saying they are not confident.

Figure 41: Interest and confidence in using mobile phone functions



M4 – I'm going to read out some different types of things that you can do with some kinds of mobile phones, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ with a mobile phone (2481 UK, 278 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

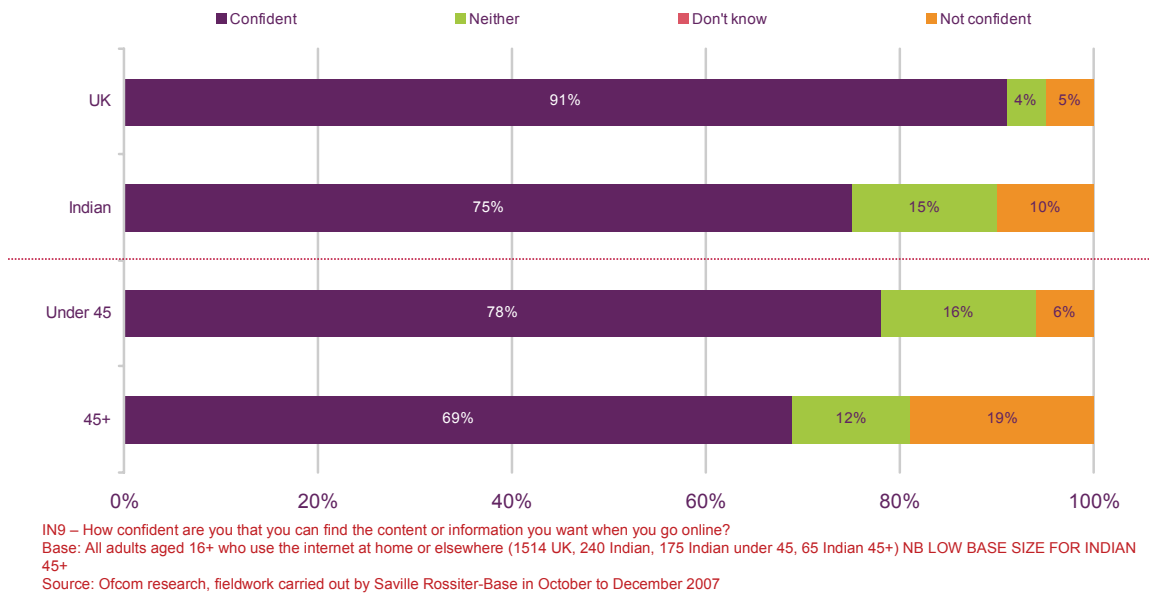
In general, interest is higher among Indian adults than for the UK overall. In particular, interest in accessing mobile operators' internet sites is higher among Indian adults under 45 than among UK adults under 45 (74% compared with 54%).

The majority of Indian adults are confident they can find the information they want online

Three-quarters of Indians say they are confident they can find the information they want online, while one in ten say they are not confident. The remaining 15% feel neither confident nor unconfident.

Indian adults under 45 are more likely to be confident than the over-44s.

Figure 42: Confidence in finding content online

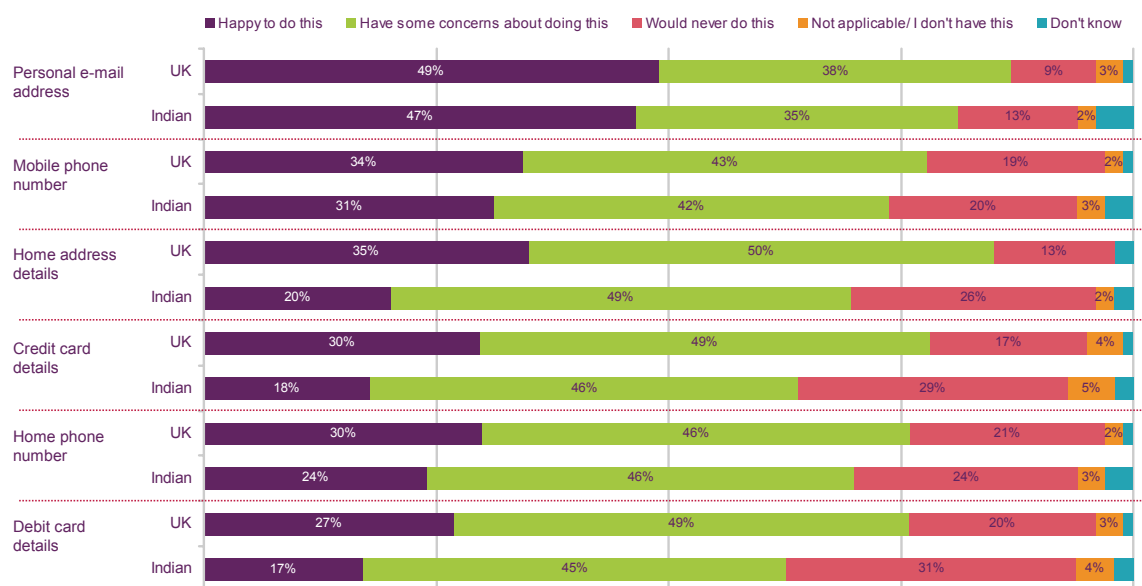


While the majority of Indian adults are confident about finding content or information online, the degree of confidence is lower when compared to all UK adults (75% compared with 91%). Even under-45 Indian adults are less confident than the UK total for that age group (78% compared with 93%).

Around half of all Indian adults are willing to give a personal email address when registering on a new website. A sizeable minority express concerns or would never do this.

Just under half of all Indian adults say they are happy to provide personal information online. Around one-third express some concerns about doing this, while just over one in ten would never do it. The greatest degree of concern relates to providing credit or debit card details, followed by home address or telephone number.

Figure 43: Information prepared to give on websites



IN41 – Please look at the options shown on this card. I'm going to read out some details about information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns.
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 240 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

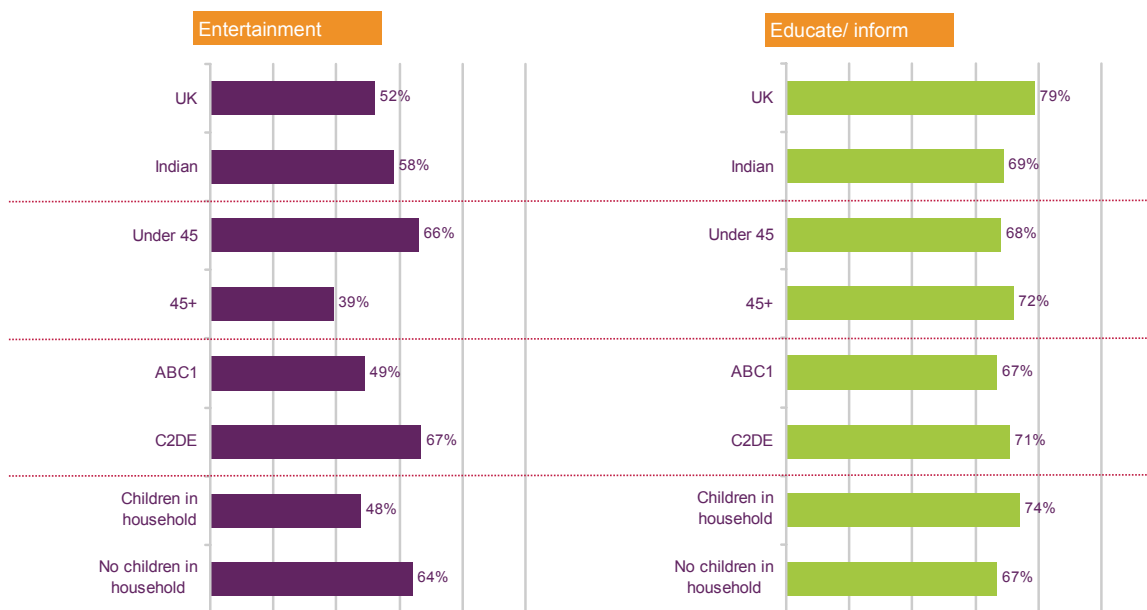
A higher proportion of Indian adults say they would never enter their personal email address, home address, credit or debit card details. These higher levels of concern correlate with a greater reluctance to buy things online.

Many see the role of the internet to be both educational and entertainment

Although the internet's role as an educational tool and provider of entertainment are both important, Indian adults are more likely to see the main role of the internet as education (69%) rather than entertainment (58%).

Views on the role of the internet being for education do not vary to any significant extent within the Indian population, but there are differences in the extent to which the internet is viewed as being for entertainment. The entertainment role of the internet is more likely to be the view of under-45 internet users, those in C2DE socio-economic groups and those without children in the household.

Figure 44: Main role of the internet: *to entertain, or to inform and educate*



IN48D-E – The main role of the internet should be to provide entertainment/ The main role of the internet should be to inform and educate people
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 240 Indian, 175 Indian under 45, 65 Indian 45+, 167 Indian ABC1, 69 Indian C2DE, 90 Indian with children in household, 150 Indian with no children in household) NB SMALL BASE SIZES FOR INDIAN 45+, C2DE, CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

When compared to the total UK population, Indian adults are less likely to think the main role of the internet is for education and information.

Under-45 internet users in the Indian population do not differ from those in the UK population on the role of the internet for entertainment, but are less likely to view the internet as being for education (68% compared with 77%).

Awareness and understanding of funding and regulation

Funding of television content

BBC channels are funded by the licence fee, and commercial public service broadcast (PSB) channels are funded by advertising (programme sponsorship provides a secondary revenue stream).

Funding of radio content

BBC stations are funded by the licence fee and commercial stations are funded by advertising (programme sponsorship provides a secondary revenue stream).

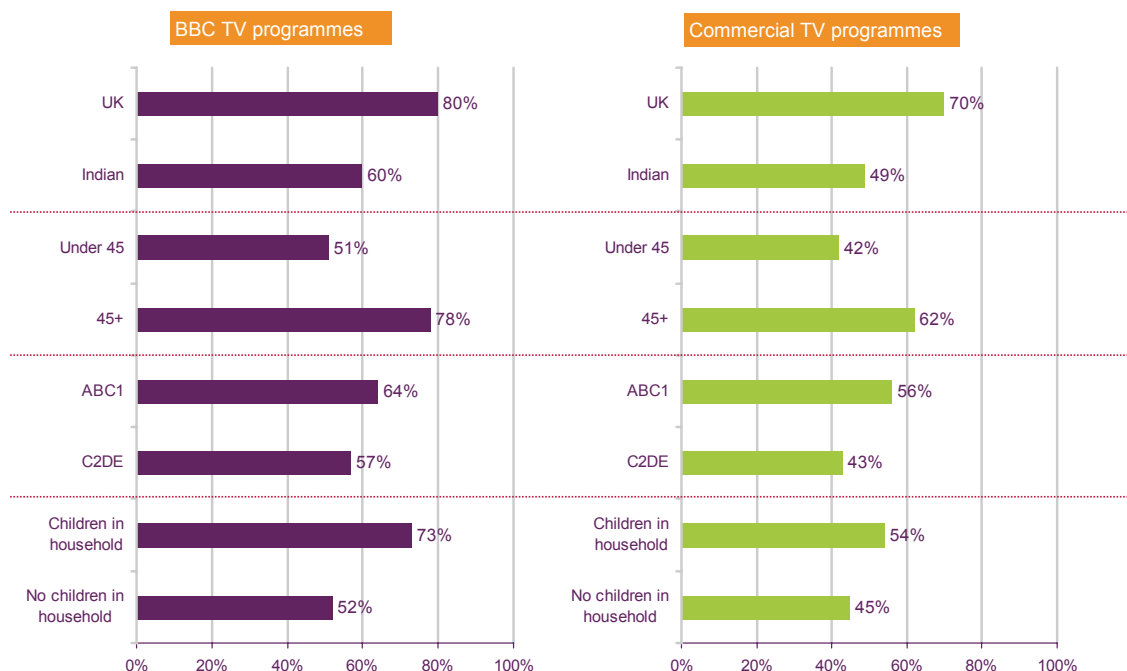
Funding of websites

The BBC website is funded by the licence fee and search engine websites such as Google are funded by advertising.

Three in five (60%) Indian adults are aware that BBC television programmes are mainly funded by the licence fee and half (49%) are aware that commercial television programmes are mainly funded by advertising.

Awareness is lower among under-45 Indian adults, those in C2DE socio-economic groups, and those who have children in the household.

Figure 45: Understanding main source of television programme funding



T8/T9 – How would you say BBC TV programmes are mainly funded?/ How would you say programmes are mainly funded on ITV, Channel 4 and Five?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 193 Indian ABC1, 101 Indian C2DE, 121 Indian with children in the household, 179 without children in the household) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Awareness of how BBC television programmes and commercial television programmes are funded is lower among Indians than the UK adult population as a whole.

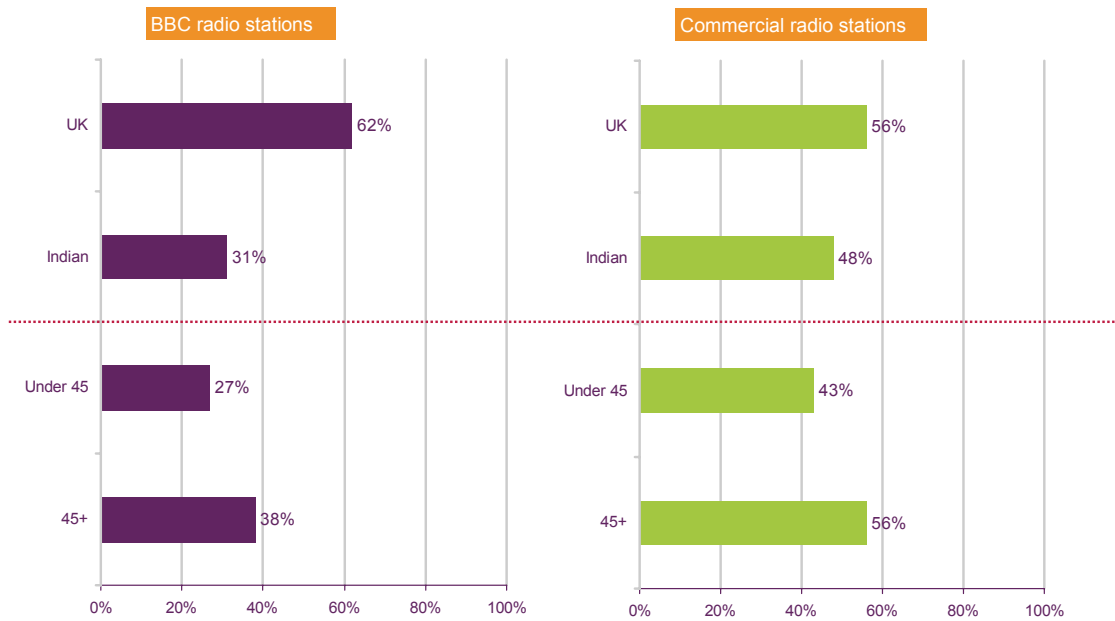
Awareness of television programme funding tends to be lower in general among the under-45s. However, when we compared awareness among under-45 Indians with the same age group in the UK population as a whole we found that the Indian adults are less aware than UK adults in the same age group of the main source of funding, both for BBC television programmes (51% compared with 73%) and for commercial television programmes (42% compared with 64%).

Commercial radio programming funding awareness is higher than BBC radio station funding awareness

Indian adults are more likely to be aware of how commercial radio programming is funded than with how BBC radio programming is funded. Awareness of both sources of programme funding is higher among Indian adults over 45.

The higher level of awareness among older people is consistent with a higher proportion saying they listen to radio, compared to the under-45s.

Figure 46: Understanding main source of radio station funding



R5/R6 – How would you say BBC radio stations are mainly funded?/ How would you say the other main radio stations are mainly funded?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

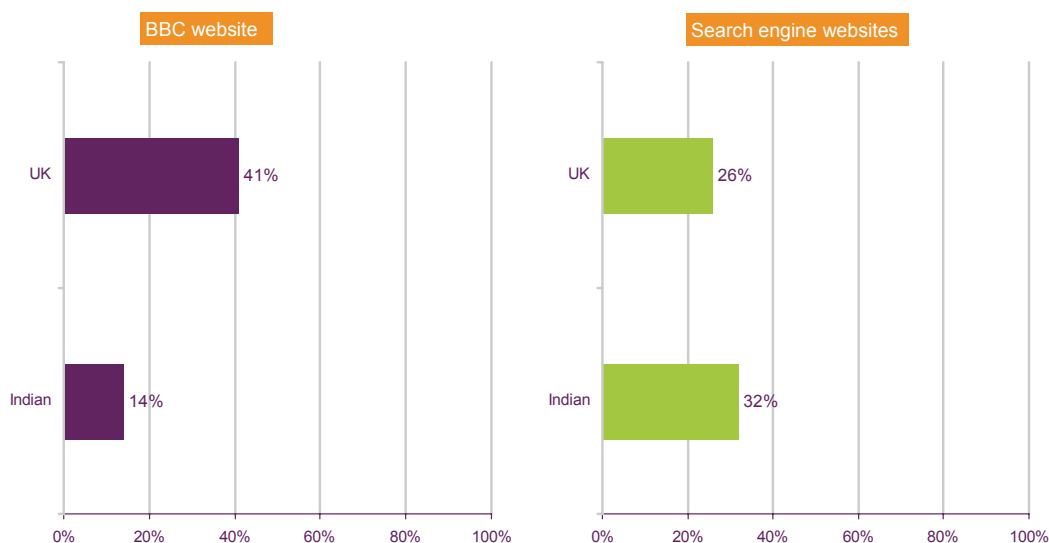
The relatively low awareness of BBC radio station funding, compared with the UK population as a whole, suggests that there is less awareness of the association between the BBC and the licence fee among the Indian population. This is further evidenced by the fact that under-45 Indian adults are less aware than under-45 UK adults of the main source of funding (27% compared with 55%), and therefore lower levels of awareness are not just due to the younger profile of the Indian community. In comparison, awareness of commercial radio station funding does not differ to any significant extent across under-45s, Indian or the UK in general.

Low awareness of how search engines and the BBC website are funded

One in three Indian adults is aware of how search engines are mainly funded. One in seven is aware how the BBC website is mainly funded; this confirms that knowledge of BBC funding, apart from television, is low. It is interesting to note that Indian adults are more likely to state that the BBC’s website is funded by advertising (19%) than by the licence fee (14%).

Awareness of the funding of search engines and the BBC website does not vary to any significant extent within the Indian population.

Figure 47: Understanding main source of website funding



IN34/ IN35 – How do you think the BBC's website is mainly funded?/ How do you think search engine websites such as Google or Ask.com are mainly funded?
 Base: All adults aged 16+ (2905 UK, 300 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

In comparison to Indian adults, UK adults as a whole are less aware of search engine website funding than of BBC website funding, and Indian adults are more aware of search engine website funding than BBC website funding.

The majority of Indian adults are aware that television programming is regulated

Television regulatory environment

BBC channels are regulated by the BBC Trust and Ofcom and UK commercial channels are regulated by Ofcom.

Radio regulatory environment

BBC stations are regulated by the BBC Trust and Ofcom and UK commercial stations are regulated by Ofcom.

Internet regulatory environment

There is no statutory regulatory body generally responsible for audio-visual content on the internet.

The BBC Trust, established by Royal Charter, issues a service licence for bbc.co.uk which encompasses BBC iPlayer and can consider any complaints about its content.

The Association for Television On-Demand (ATVOD) is a self-regulatory body committed to protecting consumers of on-demand audio-visual content on services provided by its members. Its current full members are BT, On Demand Group, Virgin Media, Channel 4, BBC (Affiliate Member), Tiscali, FilmFlex and ITV.

Sites based on user-generated content (UGC) are not subject to any statutory regulation, beyond the prohibition on illegal content.

Mobile phone content regulatory environment

All UK mobile phone operators comply with a voluntary code, under which they commit to controlling under-18s' access to adult content.

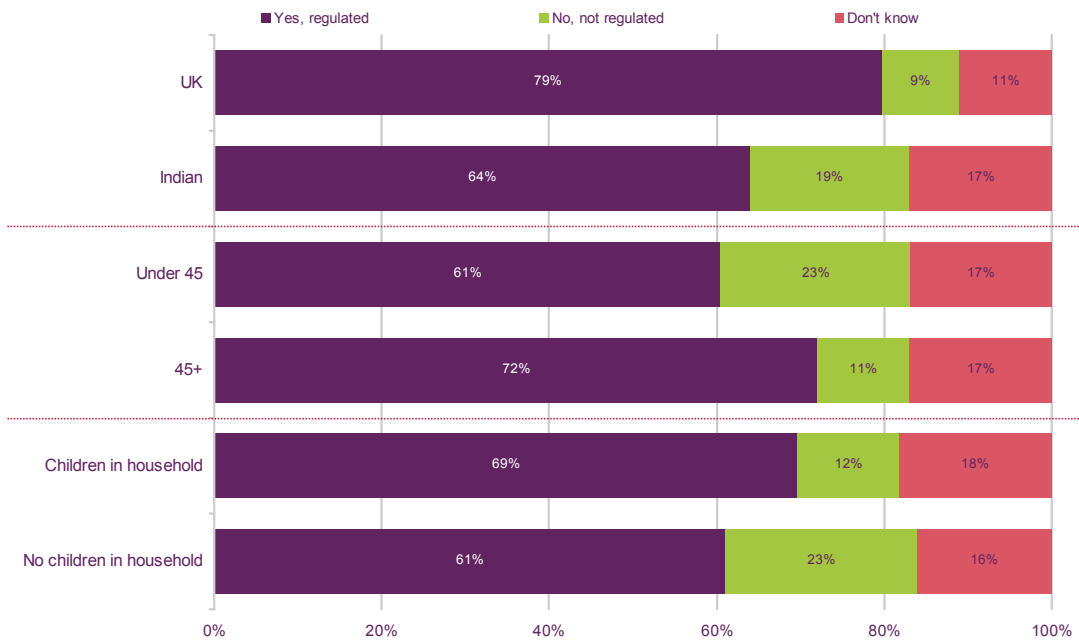
- Mobile operators have an age check system under which subscribers must show that they are 18 or over to access 18 rated content.
- In addition, a subscriber can request that the block be applied to an existing mobile number.

Electronic gaming regulatory environment

There is an industry self-regulatory framework in place for video games, under which games are voluntarily rated and labelled under the Pan European Game Information system (PEGI). PEGI ratings (3+, 7+, 12+, 16+ and 18+) provide information to consumers about the ages for whom a particular game is appropriate. In addition, in the UK, games with adult content (gross violence, criminal or sexual activity) must be reviewed and rated by the British Board of Film Classification, and bear a BBFC label. Under the Video Recordings Act 1984, games which receive BBFC 18 rating must not be sold to minors.

Nearly two-thirds of Indian adults believe that television programmes are regulated, while a minority say that television programmes are not regulated. This belief is more evident among under-45s and those without children in the household.

Figure 48: Whether believe television programmes are regulated



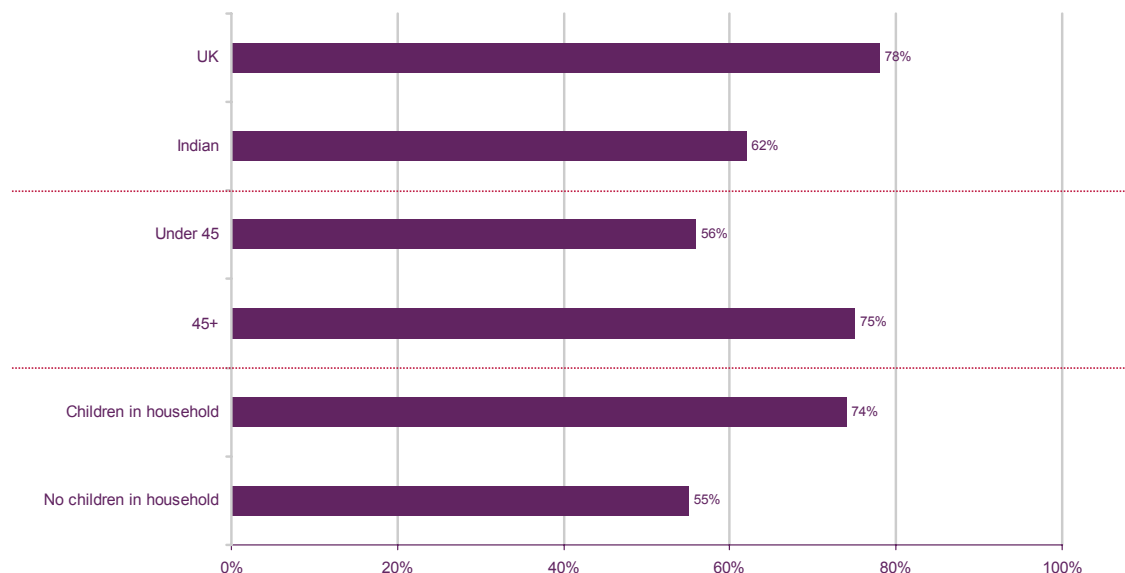
T12 – As far as you know, are TV programmes regulated?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 121 Indian with children in the household, 179 without children in the household) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

A higher percentage of all adults in the UK are aware that television content is regulated, compared with Indian adults. This lower level of awareness among Indian adults is also reflected among the under-45s. Indian adults under 45 are less likely than under-45 UK adults to believe that television programmes are regulated (61% compared with 77%).

One element of television regulation is the watershed - the requirement that any content which contains material that is unsuitable for children should not, in general, be shown before 21:00 or after 05:30.

Three in five Indian adults say there is a television watershed which starts from 9pm. Awareness of the watershed is higher among over-44s and those with children in the household.

Figure 49: Whether aware of 9pm television watershed



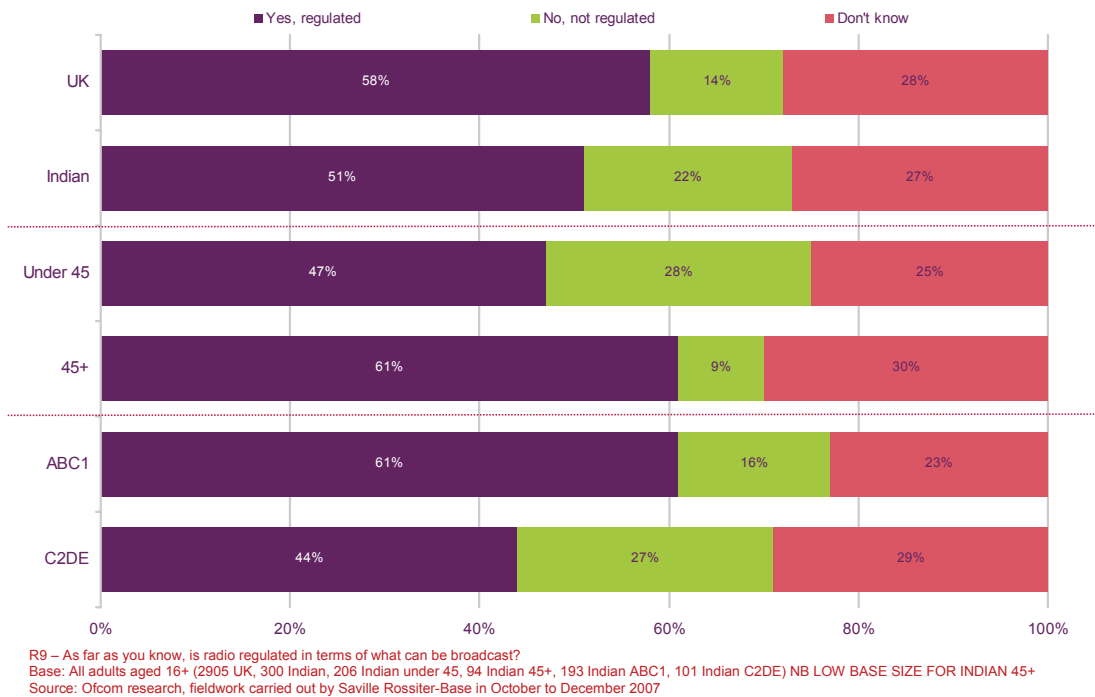
T14 – Is there a time of day after which programmes that are considered unsuitable for children can be shown? What time is this?
Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 121 Indian with children in the household, 179 without children in the household) NB LOW BASE SIZE FOR INDIAN 45+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Fewer Indian adults are aware of the watershed than in the UK population as a whole. As with the licence fee, it appears that knowledge of the television watershed is less ingrained within the Indian population.

Half (51%) of Indian adults believe that radio is regulated. One in five believes it is not and just over a quarter say they don't know whether it is regulated or not.

Belief that radio is not regulated is more common among Indian adults under 45 and those in C2DE socio-economic groups, confirming a common theme of lower funding and regulatory awareness among Indian adults under 45.

Figure 50: Whether believe radio broadcasts are regulated



Opinion on whether the internet is regulated is split among Indian adults; 31% say it is regulated and 41% say it is not regulated, with 27% unsure.

Under-45s are more likely to say the internet is not regulated (46%) compared with 29% of over-44s. This is mainly driven by the fact that under-45s are more likely to have an opinion, with 40% over-44s saying they don't know if it is regulated, compared with 21% of under-45s.

Figure 51: Whether believe internet content is regulated

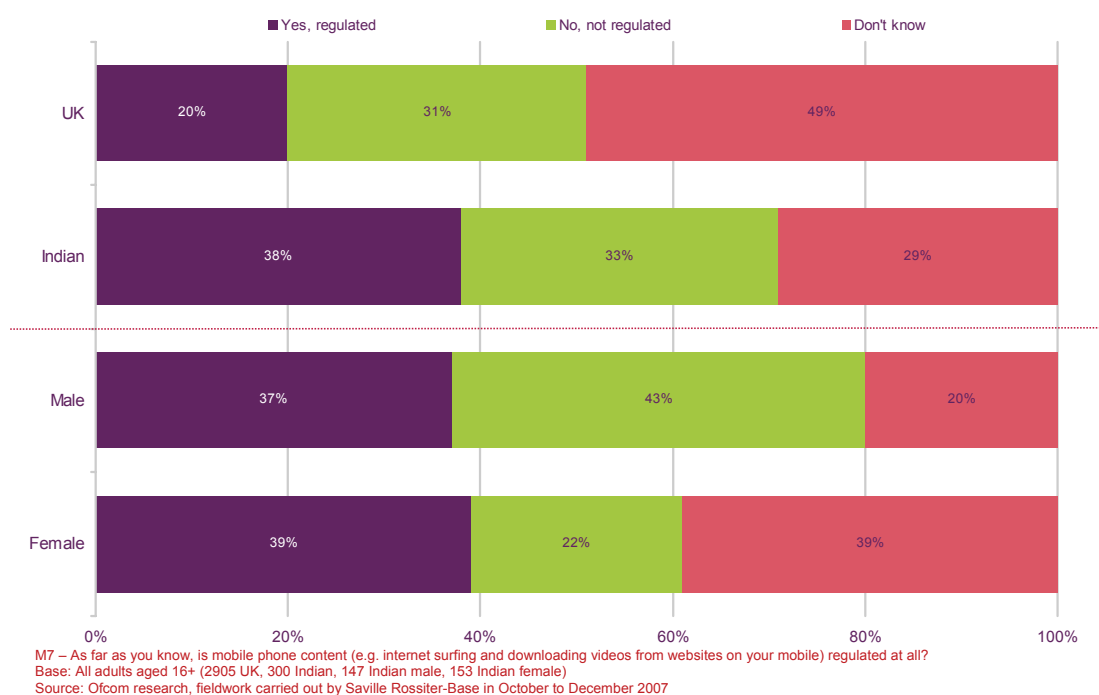


UK adults in general are less likely to have an opinion about whether the internet is regulated, with a higher proportion saying they don't know. Indian adults under 45 are more likely than similarly-aged adults in the UK population to say that internet content is not regulated (47% compared with 36%).

Opinion is also split as to whether mobile phone content is regulated; 38% say it is regulated, 33% say it is not regulated, and 29% are unsure.

Higher take-up of mobile phones does not explain the difference in perceptions of mobile phone content regulation.

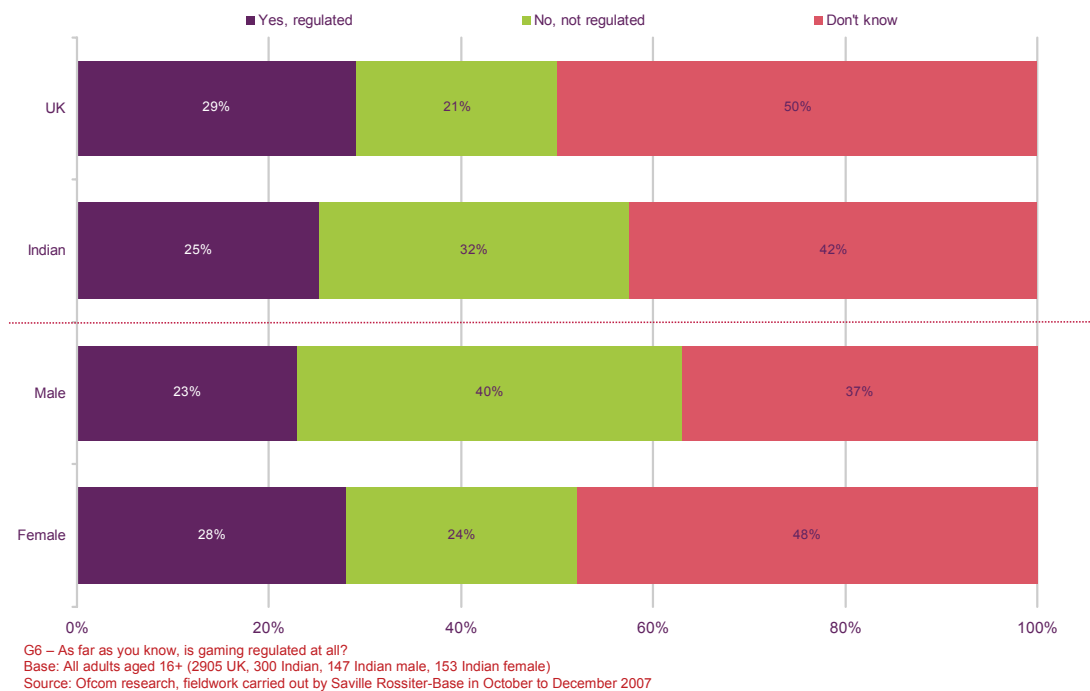
Figure 52: Whether believe mobile phone content is regulated



A similar proportion of adults in the UK overall, and in the Indian community, say that mobile phone content is not regulated. However, Indian adults are more likely to say that content is regulated while UK adults are more likely to say they don't know.

There is confusion as to whether gaming is regulated. Two in five say they don't know whether gaming is regulated or not, and one in three say it is not regulated. Those who don't know if gaming is regulated are more likely to be females.

Figure 53: Whether believe gaming is regulated



Indian adults are more likely than UK adults as a whole to say that gaming is not regulated (32% compared with 21%). Across all adults, there is no difference in the incidence of gamers in the Indian and UK populations (at 30% for the Indian population and 31% for the general UK population), so this does not impact people’s perceptions of regulation.

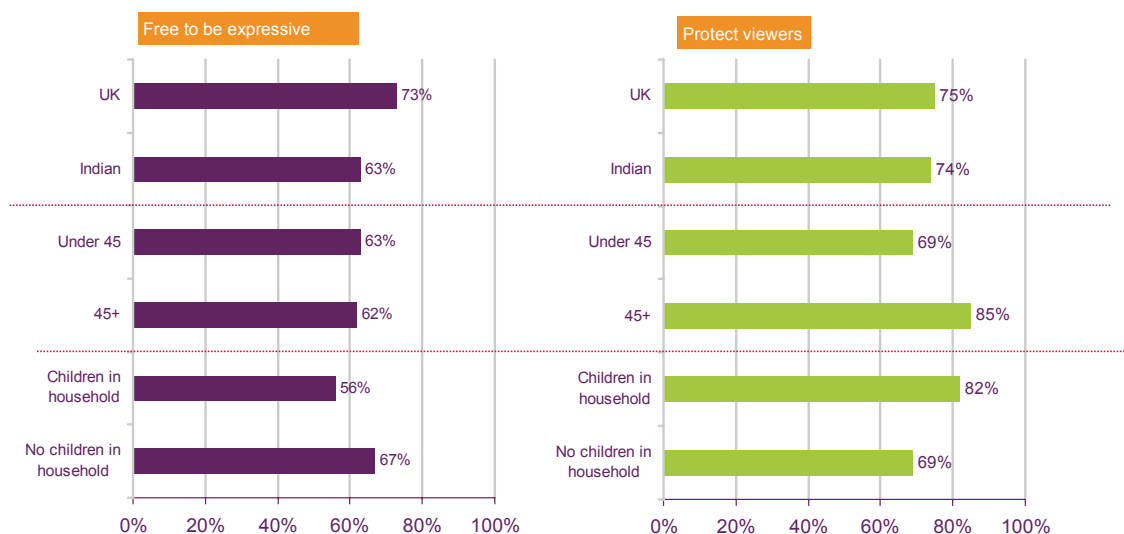
Three in four Indians agree that television viewers must be protected from inappropriate or offensive content

The majority of Indian adults agree (either strongly or slightly) that:

- television programmes must be free to be expressive and creative; and
- television viewers must be protected from seeing inappropriate or offensive content.

Agreement is stronger that viewers must be protected, in particular among over-44s and those with children in the household.

Figure 54: Attitudes towards television content: *must be free to be expressive and creative vs viewers must be protected from offensive or inappropriate content*



T17A-B – TV programmes must be free to be expressive and creative/ TV viewers must be protected from seeing inappropriate or offensive content
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 121 Indian with children in household, 179 Indian with no children in household) NB
 LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Compared to UK adults, fewer Indian adults agree that television programmes must be free to be expressive and creative, although this view is held by the majority.

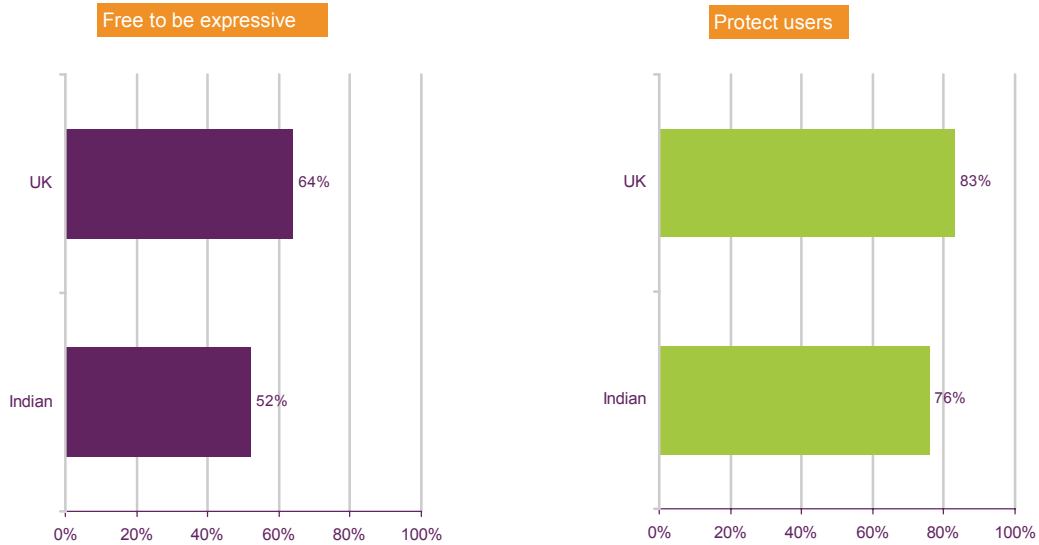
While most believe that internet users need to be protected, three in five say sites must be free to be expressive and creative

The majority of Indian adults who use the internet agree (either strongly or slightly) that:

- internet sites must be free to be expressive and creative; and
- internet users must be protected from seeing inappropriate or offensive content.

While some people agree with both statements, agreement is stronger that users must be protected. Responses do not vary to any significant extent within the Indian population.

Figure 55: Attitudes towards internet content: *must be free to be expressive and creative vs users must be protected from offensive or inappropriate content*



IN48A-B – Internet sites must be free to be expressive and creative/ Internet users must be protected from seeing inappropriate or offensive content
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 240 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

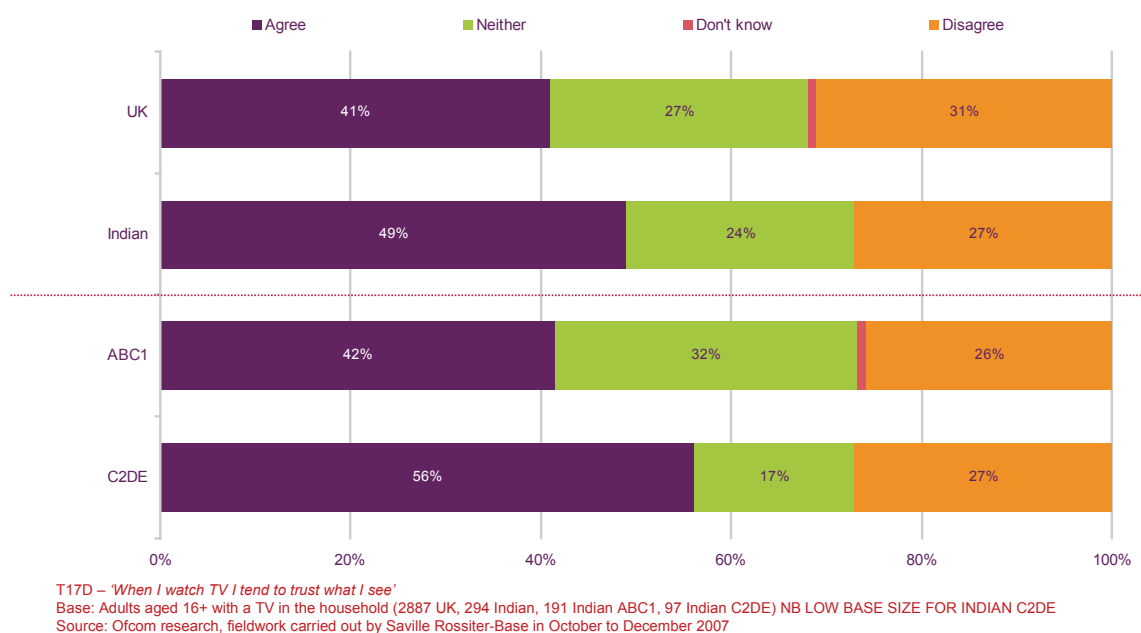
So, overall, the direction of Indian attitudes towards internet content matches that of the UK population overall, but agreement is lower for each statement.

Two in five say they trust what they see on television

Almost all Indian adults have a television in the household (97%) and more agree (49%) than disagree (27%) that they trust what they see on television. Trust in television content is higher among those in C2DE socio-economic groups.

It should be noted that this question did not distinguish between different genres of television programming or between different television channels, whether UK- or foreign-based.

Figure 56: Trust in television: when I watch television I tend to trust what I see



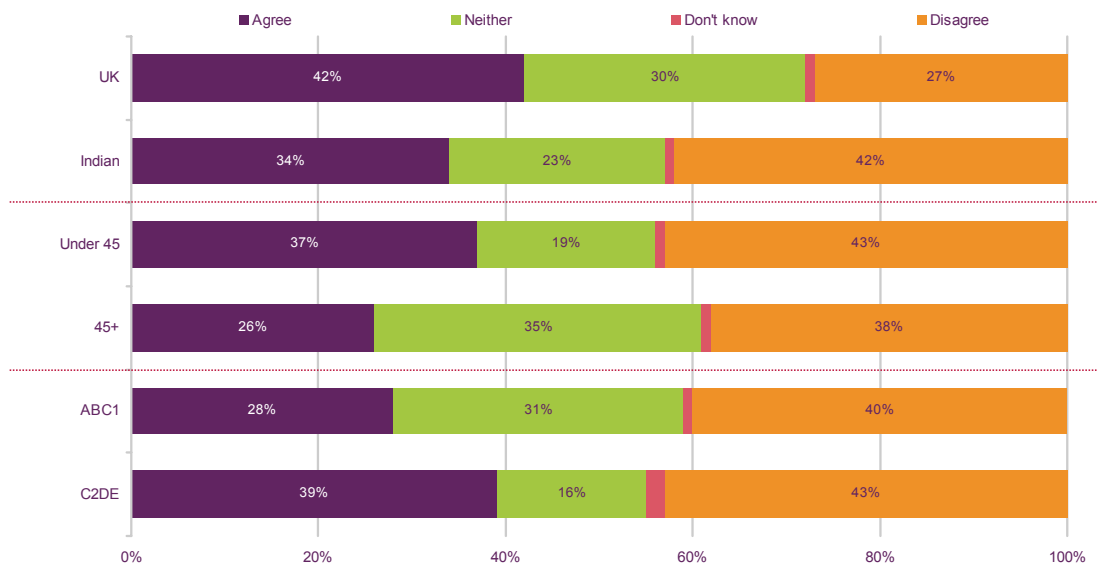
Nine in ten (91%) Indian adults say they watch news or factual programmes. Among these viewers, the proportion saying they believe most of what is on these programmes (47%) is similar to the proportion that say their level of belief in these programmes varies according to the channel, or that they are sceptical about the information on these programmes (46%). This degree of critical evaluation is more evident among those in ABC1 socio-economic groups (51%), and under-45s (49%), and is similar at the overall level to the UK measure (51%).

Indian adults are less likely to agree that they tend to trust what they read or see online

Thirty four per cent agree that they tend to trust what they read or see online, compared with 42% who say they disagree. As with assessing trust in television content, this question did not differentiate by the type of content. Agreement does differ by age and socio-economic group; over-44s and ABC1s are less likely to have an opinion than others.

As detailed earlier, Indian adults who use the internet are less likely to do banking online and are more concerned about providing personal details on websites. Responses from Indian adults regarding trust in website content are possibly informed by this attitude.

Figure 57: Trust in internet: *when I visit websites I tend to trust what I read or see*



IN49A – ‘When I visit websites, I tend to trust what I read or see’
 Base: All adults aged 16+ who use the internet at home or elsewhere (1514 UK, 240 Indian, 175 Indian under 45, 65 Indian 45+, 167 Indian ABC1, 69 Indian C2DE)
 NB LOW BASE SIZE FOR INDIAN 45+, C2DE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The level of disagreement is higher among Indian adults than among UK adults overall.

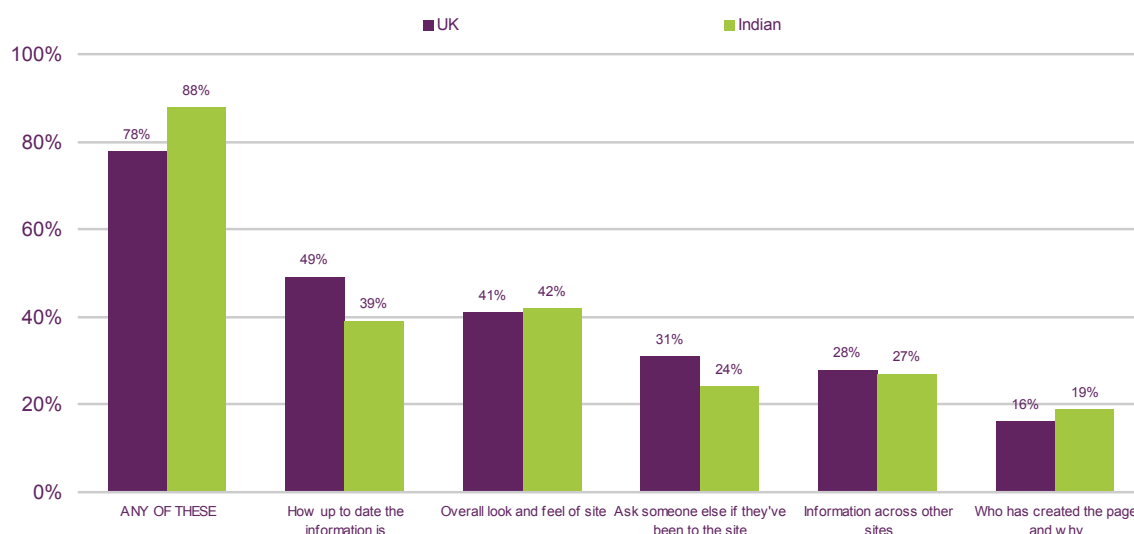
The majority of Indian adults make one check when they enter a new website

We asked people whether they check a new website before using it, and whether they make any judgements before entering personal details on a website. Eighty four per cent of Indian adults who use the internet have ever used new websites. Visiting new websites is more common for internet users under 45.

Among those that do visit new websites, the majority of Indian adults make at least one of the checks shown in Figure 58. The most commonly mentioned action is assessing the look and feel of the site, followed by checking how up-to-date the information is.

No single check is made by more than half of all users.

Figure 58: Checks made when visiting new websites



IN16 – Thinking about new websites you visit, which, if any, of these things would you check?
 Base: All adults aged 16+ who use the internet at home or elsewhere who visit new websites (1536 UK, 199 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

At the overall level, Indian adults are more likely to make these checks compared to UK users overall, but are also more likely to make just one of the checks shown.

One quarter of Indian adults would not make a judgement about a site before entering personal details

The majority of Indian adults (77%) say they would make a judgement about a website before entering personal details. However, one in four say they would not make any judgement. It may be that this finding is a reflection of lower use of websites that require personal details, given that Indian adults are less likely to purchase online and have more concerns about entering personal details.

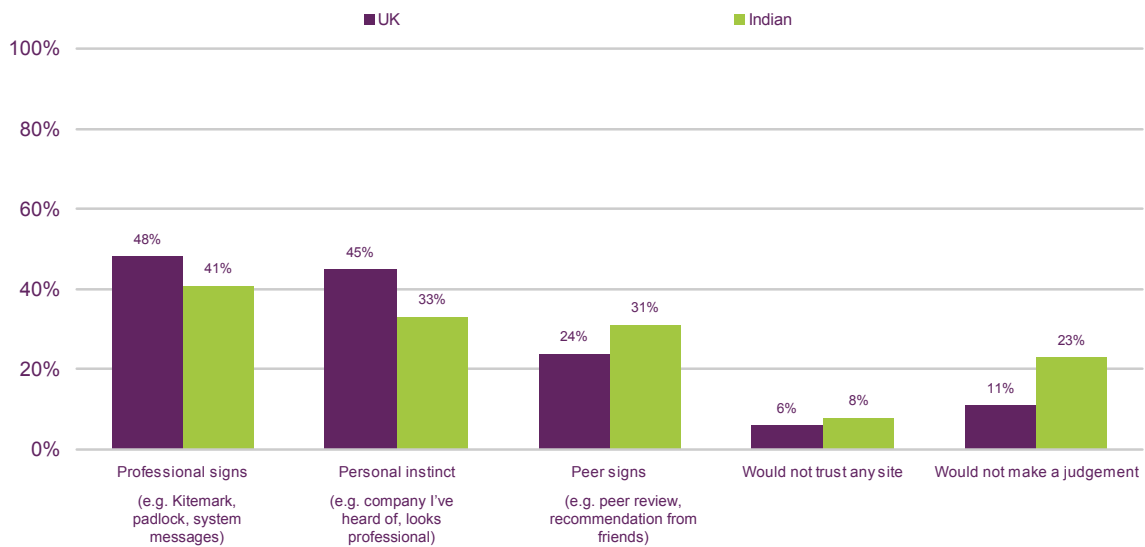
The most common actions they would base a judgement on are: looking for professional signs¹⁵, followed by using personal instinct and using peer signs¹⁶.

There are some differences across the demographic groups: under-45s are more likely to look for professional signs, females are more likely to base a judgement on personal instinct, while those with children in the household are more likely to say they would not make a judgement before entering personal details.

¹⁵ Professional signs include symbols or accreditations by other organisations such as the padlock sign or kitemark

¹⁶ Peer signs include information given by other users such as service ratings, feedback and recommendations

Figure 59: Judgements made about a website before entering personal details



IN42 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) (Spontaneous responses)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1514 UK, 240 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

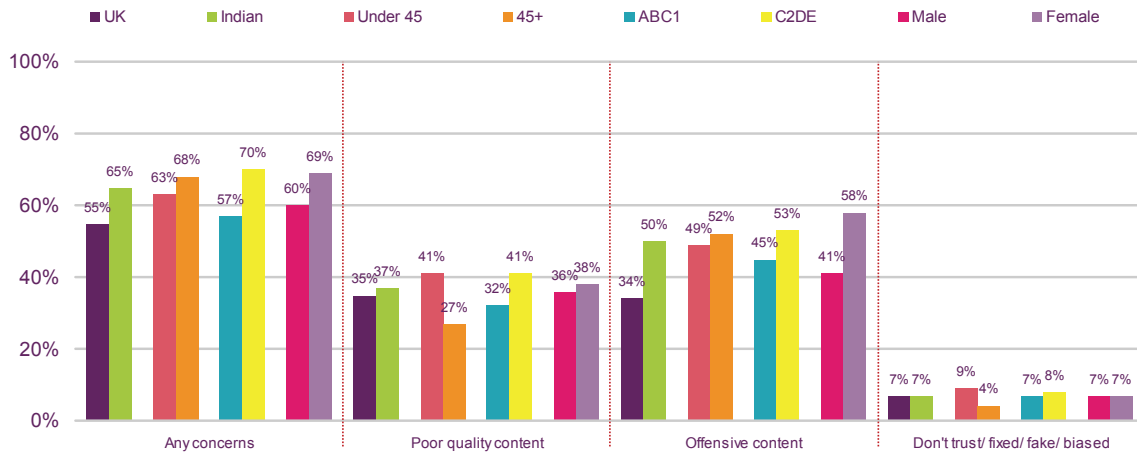
Unprompted responses regarding concerns about what is on television have been grouped into three themes;

- poor quality content - responses such as *too many repeats, too many reality television programmes, poor quality programmes and too many advertising breaks;*
- offensive content - responses such as *violence, bad language, sex/ nakedness and people behaving badly;* and
- don't trust/ fixed/ fake/ biased - responses such as *phone-in competitions that are fixed/ faked.*

Offensive content is the biggest concern about what is on television

Two-thirds of Indian adults have some concerns about what is shown on television. Concerns relate mainly to offensive content; the three most commonly mentioned concerns are: sex and nudity, violence and bad language. Concerns about television content are more likely to be mentioned by Indian adults in C2DE socio-economic groups and by females. Concerns about offensive content are higher among under-45s than over-44s.

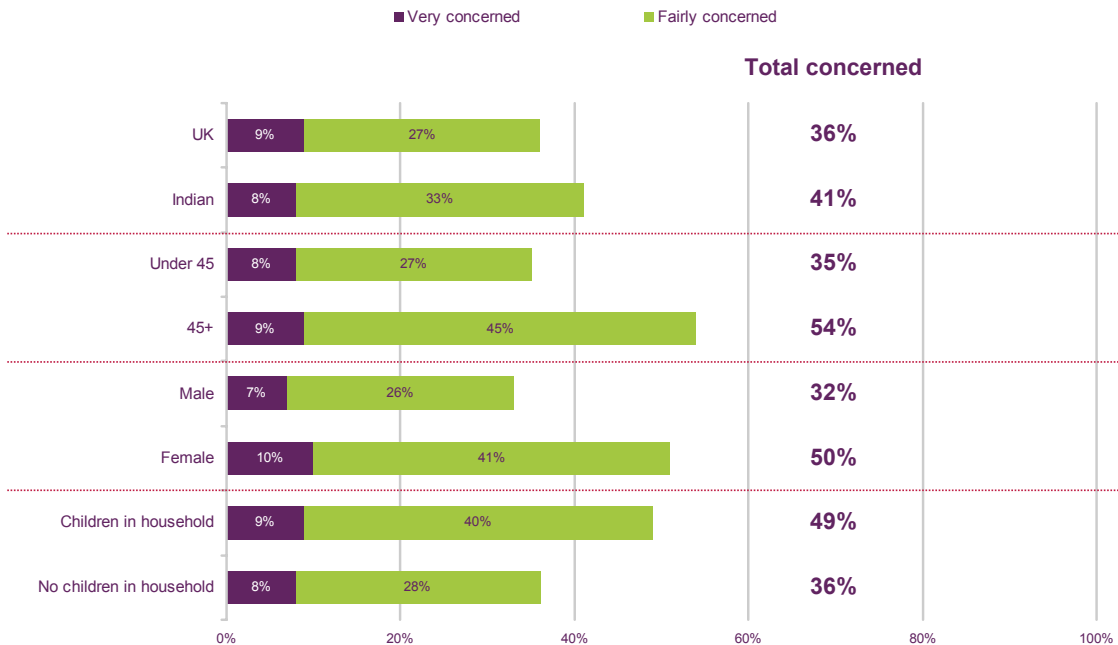
Figure 60: Concerns about what is on television



T10 – Can you tell me if you have any concerns about what is on TV? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian over 45, 193 Indian ABC1, 101 Indian C2DE, 147 Indian male, 153 Indian female)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

In general, Indian adults are more likely to have concerns than UK adults in general. Among Indian adults, the extent of concern about what is on television is higher among adults over 45, females, and those with children in the household. This profile of the more concerned adults is similar to that found in the UK population overall.

Figure 61: Extent of concern about what is on television



T11 – Overall, how concerned are you about what is on TV?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 147 Indian male, 153 Indian female, 121 Indian with children in household, 179 Indian with no children in household) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The extent of expressed concern is similar to that for all UK adults. So although Indians mention more concerns about what is on television, it does not appear the content in question is causing greater concern than that experienced by the UK population overall.

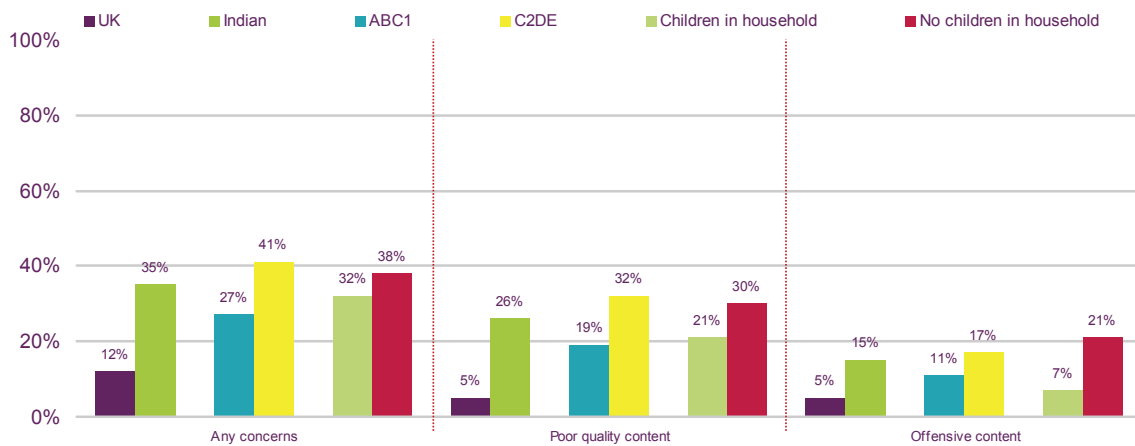
Indian adults are significantly more likely than UK adults to be concerned about what is on the radio

One in three Indian adults have concerns about what is on the radio; a much higher proportion than among all UK adults. Unprompted responses on this topic have been grouped into two themes:

- poor quality content - responses such as *too many advertising breaks, lack of originality/ programmes are similar, and poor quality programmes*; and
- offensive content - responses such as *bad language, bad taste/ shock tactics and drug references*

Concerns among Indian adults most commonly relate to poor quality content, followed by offensive content. The number of mentions of concerns is much higher among Indian adults than among UK adults overall. Among Indian adults the three most common unprompted concerns about what is on the radio are: too many advertising breaks, poor quality programmes, and bad taste/ shock tactics. Concerns about radio content are more likely to be mentioned by Indian adults in C2DE socio-economic groups and by those without children in the household.

Figure 62: Concerns about what is on the radio



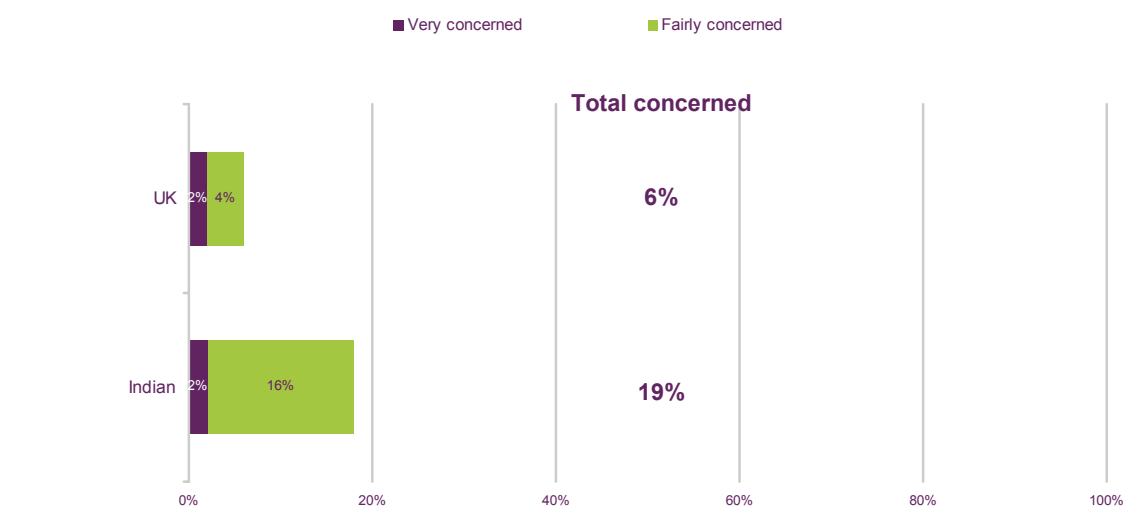
R7 – Can you tell me if you have any concerns about what is on radio? What sorts of things are you concerned about?

Base: All adults aged 16+ (2905 UK, 300 Indian, 193 Indian ABC1, 101 Indian C2DE, 121 Indian with children in household, 179 Indian with no children in household)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

When asked to what extent they are concerned about what is on the radio, one in five Indian adults say they are either very, or fairly, concerned, with little variation across demographic groups.

Figure 63: Extent of concern about what is on the radio



R8 – Overall, how concerned are you about what is on radio?
Base: All adults aged 16+ (2905 UK, 300 Indian)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While this is a minority view, the extent of concern is much higher than among UK adults.

Indian adults are more likely than others to be concerned about risks to computers

Unprompted responses regarding concerns about what is on the internet were grouped into five themes:

- offensive content - responses such as *sexual content/ pornography, unsuitable for children and violent content*;
- risk to society/ values - responses such as *paedophiles/ perverts masquerading as young people online, websites showing abuse of children, websites instructing how to be a terrorist and websites instructing how to commit suicide*;
- risk to finances/ device - responses such as *identity fraud/ others getting access to my personal detail, computer viruses/ bugs and insecure sites*;
- personal privacy - responses such as *spam/ unwanted emails and claims for money/ phishing emails*; and
- poor quality content - responses such as *pop-up adverts*.

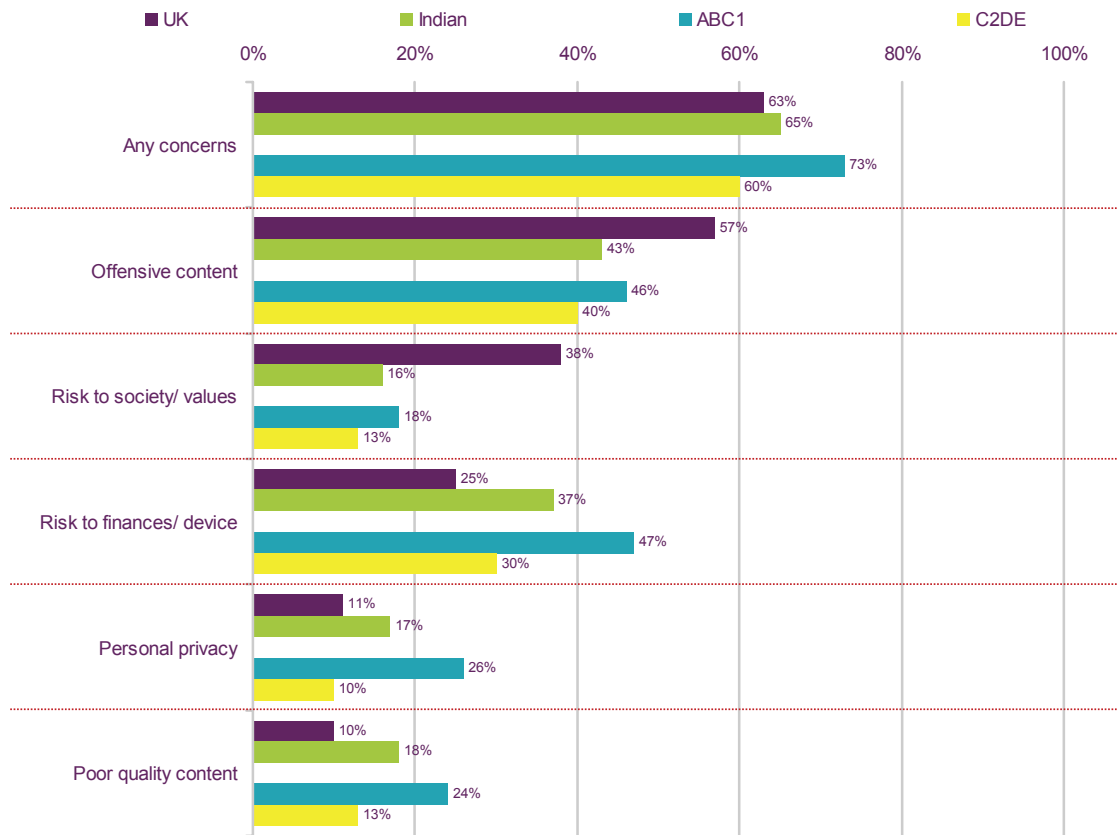
Two-thirds of Indian adults mention a concern regarding the internet.

The five most common concerns about what is on the internet are: computer viruses, identity fraud, pop-up adverts, spam/ unwanted emails, and insecure websites. Indian adults are as likely to mention a concern about risks to finances and devices as they are to mention offensive content.

These responses suggest a quite different perception of the internet among Indian adults, and these concerns clearly correspond with their lower use of online shopping and their greater concern about entering personal details.

Concerns about what is on the internet are more likely to be mentioned by Indian adults in ABC1 socio-economic groups.

Figure 64: Concerns about what is on the internet



IN36 – Can you tell me if you have any concerns about what is on the internet? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 193 Indian ABC1, 101 Indian C2DE)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While Indian adults are equally likely to mention a concern about the internet as UK adults in general, the types of concerns differ. They are less likely to mention offensive content or risks to society, but far more likely to mention risks to finances/devices.

When asked to what extent they are concerned about what is on the internet, half of all Indian adults say they are either very, or fairly, concerned. Among Indian adults, the extent of concern about what is on the internet is higher among adults over 45 and those in ABC1 socio-economic groups.

Figure 65: Extent of concern about what is on the internet



IN37 – Overall, how concerned are you about what is on the internet?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+, 193 Indian ABC1, 101 Indian C2DE) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

There is little difference in this measure between Indian adults and UK adults overall.

Concerns about mobile phones are mainly about affordability

The majority of Indian adults have concerns about mobile phones. Unprompted responses on this topic have been grouped into five themes:

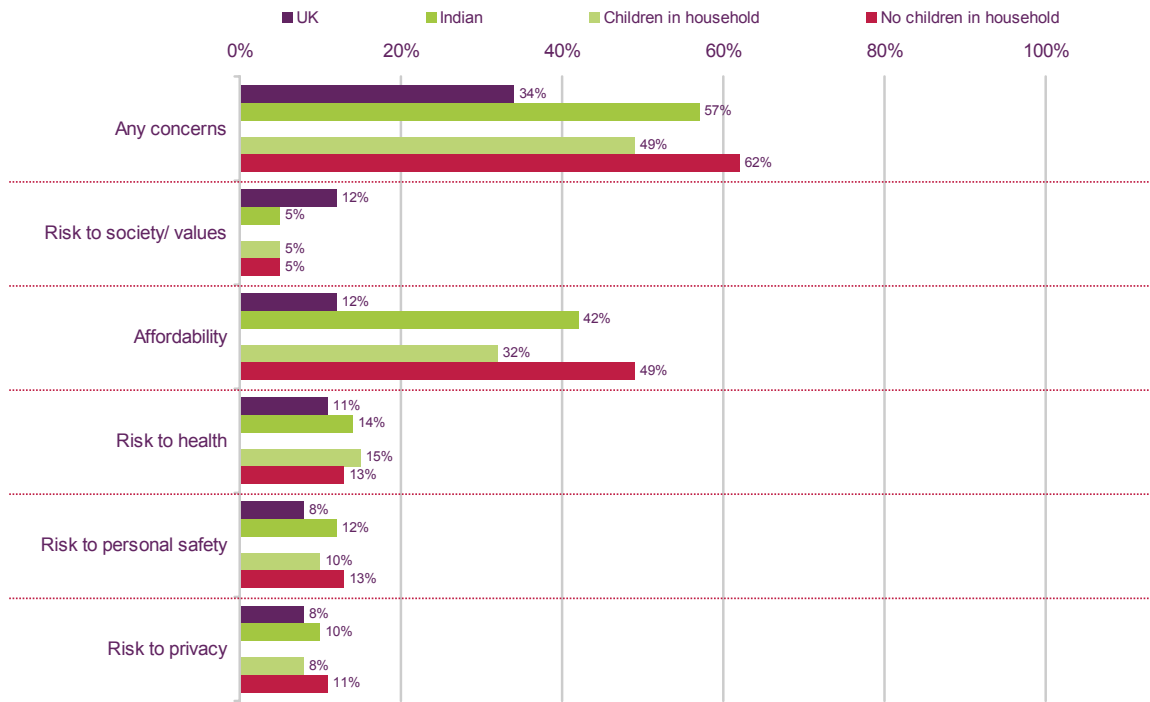
- risk to society/ values - responses such as *misuse of camera phones, happy slapping, children having phones at a young age and paedophiles contacting children*;
- affordability - responses such as *cost of calls generally* and *cost of calls when abroad*;
- risk to health - responses such as *health concerns using handset* and *health concerns - masts*;
- risk to personal safety - responses such as *target for theft of mobile phone*; and
- risk to privacy - responses such as *intrusion into other people's space/ public space* and *junk/ spam text messages*.

Over half of all Indian adults are concerned about mobile phones and these concerns are dominated by concerns about affordability.

Among Indian adults, the three most common unprompted concerns about mobile phones are: the cost of calls (generally), the cost of calls when abroad, and being a target for theft of the mobile phone. This study does not provide detail on how Indian adults use their mobile phones, but higher levels of take-up, greater interest in interactive functions and the younger profile of the Indian population generally suggest higher volumes of use, compared to the overall UK population.

Concerns about mobile phones generally are more likely to be mentioned by Indian adults with no children in the household.

Figure 66: Concerns about mobile phones



M5 – Can you tell me if you have any concerns about mobile phones?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 121 Indian with children in household, 179 Indian with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Fewer people in the overall UK population than among Indian adults mention concerns relating to mobile phones. This difference is very much driven by mentions of affordability.

When asked to what extent they are concerned about mobile phones, two in five Indian adults say they are either very, or fairly, concerned, with no real variation across demographic groups. While this is a minority view, the extent of concern is much higher than among UK adults overall.

Figure 67: Extent of concern about mobile phones



M6 – Overall, how concerned are you about mobile phones?
Base: All adults aged 16+ (2905 UK, 300 Indian)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Nearly two in five are concerned about gaming

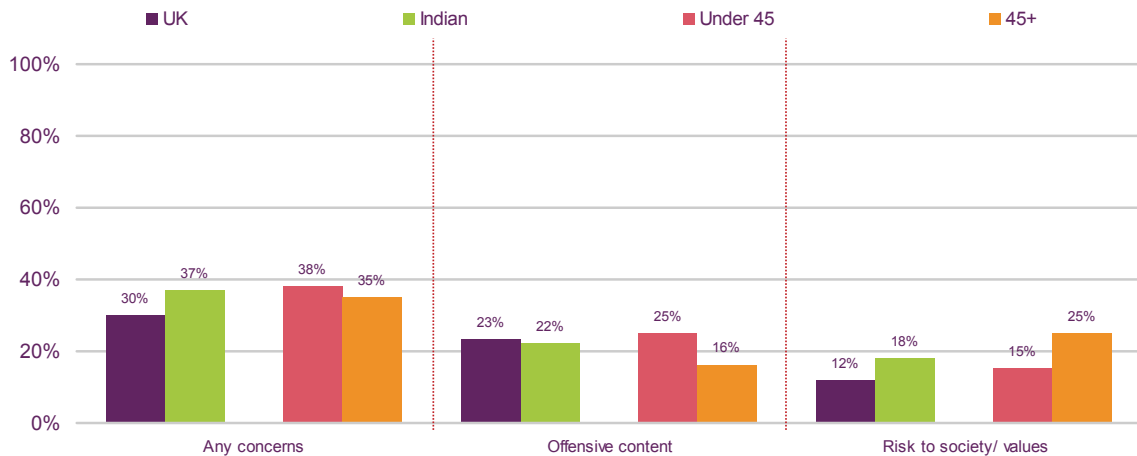
Unprompted responses regarding concerns about gaming have been grouped into two themes:

- offensive content - responses such as *violent content*, *bad language* and *sexual content*; and
- risk to society/ values - responses such as *unsuitable for children*, *encourage children to stay indoors* and *impact on social skills*.

Concerns among Indian adults are split equally between these two themes. The four most common unprompted concerns about gaming are: *violent content*, *discourage creative play for children*, *bad language*, and *encourage children to stay indoors*.

Concerns about gaming, and the risk to society/ values, are more likely to be mentioned by Indians aged 45 and over.

Figure 68: Concerns about gaming



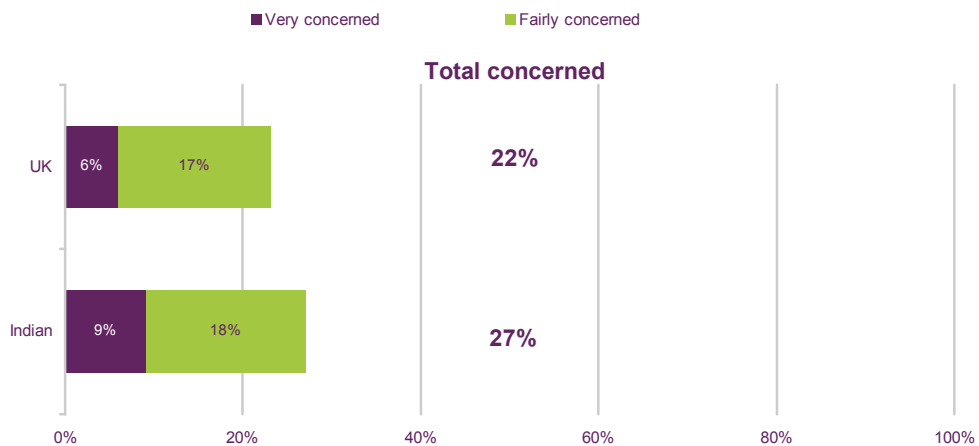
G4 – Can you tell me if you have any concerns about gaming?
 Base: All adults aged 16+ (2905 UK, 300 Indian, 206 Indian under 45, 94 Indian 45+) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

A higher proportion of Indian adults expressed a concern about gaming than UK adults overall. This higher level of concern is influenced by more mentions of risks to society or values.

When asked to what extent they are concerned about gaming, around one in four Indian adults said they are either very, or fairly, concerned.

Among Indian adults, the extent of concern about gaming does not vary to any significant extent across the demographic groups.

Figure 69: Extent of concern about gaming



G5 – Overall, how concerned are you about gaming?
 Base: All adults aged 16+ (2905 UK, 300 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The extent of concern by Indian adults is similar to UK adults overall. So although they mention more concerns about gaming, it does not appear that the issue of gaming is causing them greater concern than that experienced by the UK population overall.

4.4 Create

Two-thirds of Indian internet users are confident about creating content, but a quarter are not

Three in five Indian adults who use the internet say they are confident in using creative functionality on the internet and mobile phone, such as creating blogs, editing and sharing photos online, and uploading videos from a mobile phone.

Confidence is more evident among the under-45s, who are more likely to use the internet's creative functions.

Figure 70: Confidence in creating content



IN10 – How confident are you in using the creative elements that media such as internet and mobile phones offer? This includes creating blogs (or online diaries), editing photos and sharing them with friends and uploading short videos from a mobile phone
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 240 Indian, 175 Indian under 45, 65 Indian 45+) NB LOW BASE SIZE FOR INDIAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Responses do not differ to any significant extent from UK adults overall in terms of confidence, which is perhaps surprising given the finding (below) that Indian adults are more likely than UK adults overall to have experience of the creative aspects of the internet.

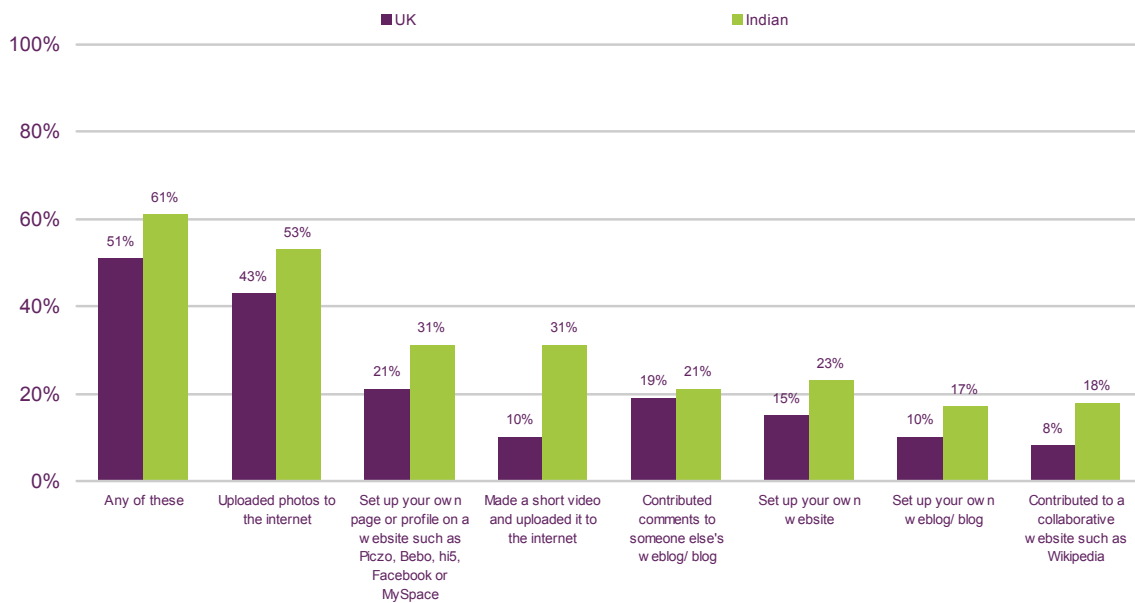
Compared to UK adults, Indian adults are more likely to give a neutral (neither confident nor not confident) response. This higher level of neutral response, while given only by a minority, corresponds with the earlier finding relating to confidence in finding content online.

In general, Indian adults are more likely than UK adults to have experience of creating content

Three in five Indian adults who use the internet have used the internet for specific creative functions; most commonly, uploading photos to the internet, with a minority having experience of the other functions shown in Figure 71.

With the exception of setting up a social networking profile, experience of creative functions does not vary to any significant extent within the Indian population. As such, unlike other measures relating to the internet and the Indian population, we do not see significantly different measures of experience of creative functions between males and females.

Figure 71: Experience of creative activities



IN28A-G – I'd like to read out a number of things people might do using the types of technologies we've been talking about. For each one, could you please tell me if you've done it, or you'd be interested in doing it, or you're not interested in doing it?
 Base: All who use the internet at home or elsewhere (1723 UK, 240 Indian)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Experience of any of these creative functions among Indian adults is higher than among UK adults who use the internet, but (as reported above) confidence with creative elements is no higher among Indian adults.

A third of Indian internet users have a SNS page or profile

Around one in three (31%) Indian adults who use the internet have a social networking site page or profile, making this more common than among the UK population using the internet (21%). Of those with a page or profile, most have more than one site profile, with an average of 2.3 among Indian social networking site users.

Using social networking sites is more common among internet users under 45.

The base size for social networking site users among Indian adults is low, and so further details are indicative only. It appears that Indian social networking site users are more likely than UK users to;

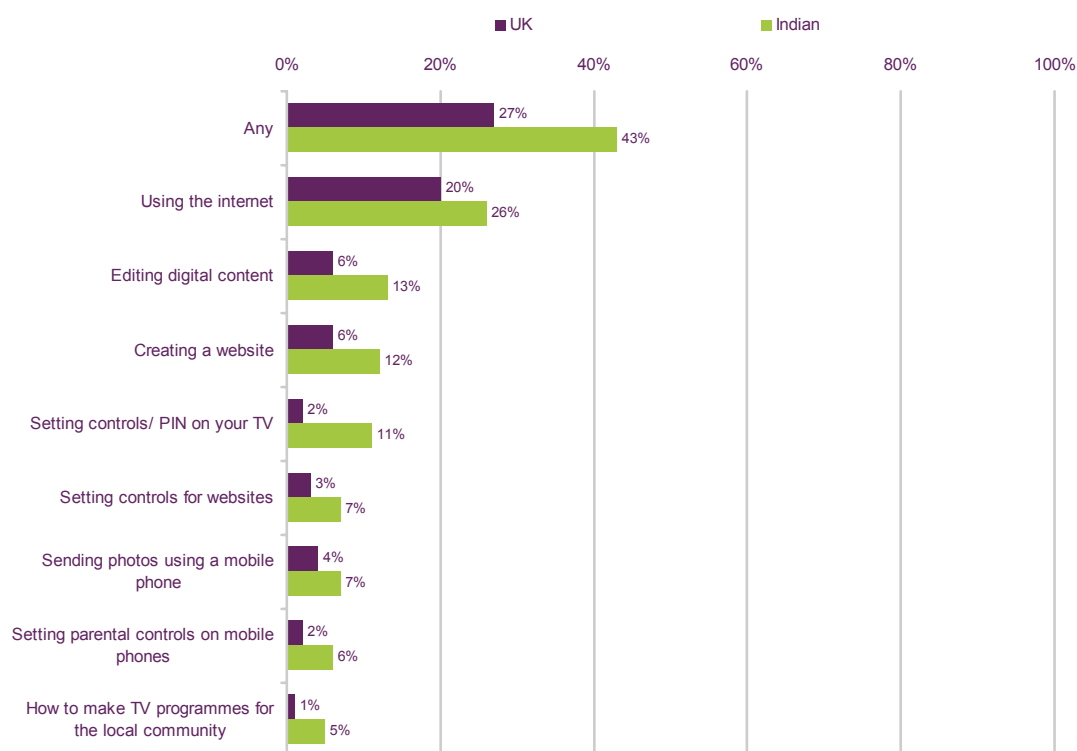
- have a profile on Facebook or hi5;
- use social networking sites more frequently;
- have a profile that can be seen by anyone; and
- use the sites to talk to people they don't know.

Learning about media is dominated by learning about the internet

Just under half of all Indian adults have experience of formal teaching of digital technology through classes or another type of training. The main subject is learning to use the internet.

As might be expected, experience of learning about digital technologies is higher among Indian adults aged under 45 (47% compared with 35% of those aged 45 and over).

Figure 72: Experience of learning about digital technology



Z9 – Thinking about the types of things you might learn about TV, the internet, mobile phones and so on... Can you tell me which, if any, of these have you learned more about through classes or any other type of training?
 Base: All adults aged 16+ (2905 UK, 300 Indian) Shows responses from 5% or more of all Indian adults
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Learning within the UK population overall is lower than within the Indian community. Given the higher volume of use of the internet in the workplace or place of education among the Indian population. This is likely to explain some of the differences in exposure to formal teaching, as seen in Figure 72.

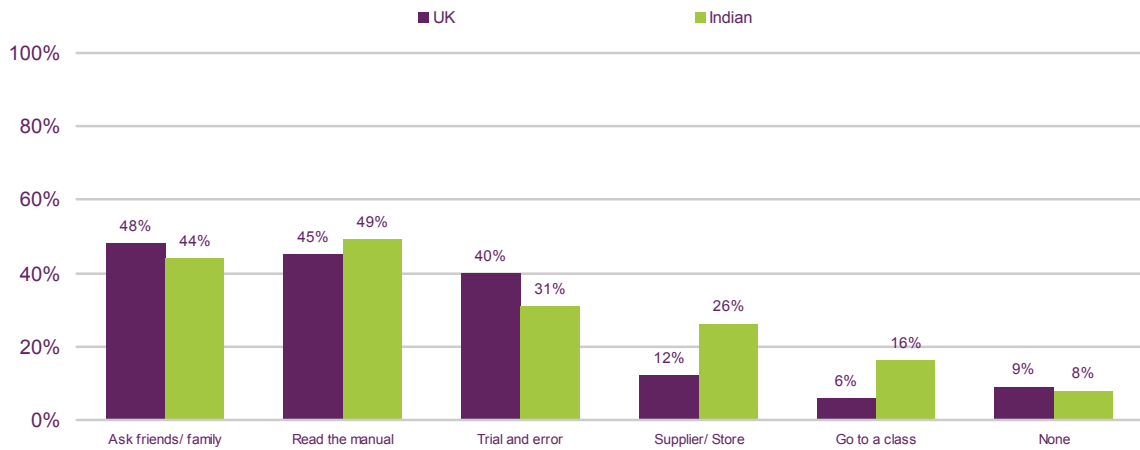
Furthermore, this exposure to learning is also higher among under-45s (47%) than it is among the same age group across the UK (34%).

Reading a manual, and asking friends and family, are the most preferred learning methods

Among Indian adults the most preferred options for learning about digital technology are by reading the manual or instructions, asking friends and family, and through trial and error.

Within the Indian population, there are few differences across different demographic groups regarding preferences for learning.

Figure 73: Preference for learning about digital technology



Z8 – We have discussed digital television and radio, the internet and mobile phones. Please tell me which of these are ways you prefer to learn about using such services?

Base: All adults aged 16+ (2905 UK, 300 Indian)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Indian adults are less likely than the overall UK population to prefer to learn through trial and error and more likely to prefer to learn through the supplier or store or to go to a class.

Section 5

Pakistani adults

5.1 Summary

The demographic profile of the Pakistani adult population differs from the UK average population and from the other EMGs in this report across a number of variables;

- The Pakistani community has a younger profile, with 74% of Pakistani adults aged 16-44 years, compared with 52% of the total UK population. Pakistanis and Black Africans have the youngest age profile of the four EMGs detailed in this document.
- Pakistani adults are the EMG most likely to live in a C2DE household, compared to the total UK population, and are considerably less likely to be in the ABC1 groups than Indians, the other Asian group detailed in this report.
- A lower proportion of Pakistani adults are likely to be working than any of the other EMGs in this survey. This is partly due to the higher number of Pakistani women who do not work, reflecting a cultural difference in attitudes towards women working outside the home.
- This group has the largest average household size (5.0) and the second highest average number of children (2.3)

It should be noted that the age profile of those who do *not* have children in the household differs between Pakistani adults and the UK population as a whole. In the Pakistani population, those without children tend to be younger (pre-family) whereas households without children in the UK general population tend to be older (post-family). Therefore in Pakistani households without children, media literacy attitudes and behaviours tend to be those of younger people, whereas in UK households without children, media literacy attitudes and behaviours more closely reflect those of retired people.

Access

Table 4: Key access measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
**Multiple platform ownership	62%	65%	55%	62%	53%
Digital TV ownership	83%	89%	81%	82%	82%
Mobile phone take-up	90%	91%	88%	95%	85%
Internet take-up	76%	72%	64%	69%	62%
*Willingness to get internet	25%	35%	30%	30%	15%

** Home ownership of digital television, internet and mobile phone

* Base: All adults who do not have the internet at home

Two-thirds of Pakistanis live in a household with multiple media devices (defined as being digital television *and* the internet *and* a mobile phone). The Pakistani adults who are more likely to have these media devices tend to be under 45 and ABC1. Multimedia access is higher in Pakistani households than among the UK population as a whole.

Digital television ownership is the highest of all the EMGs detailed in this report, and higher than the UK population as a whole. As with all the EMGs, Pakistani adults are more likely to have a cable or satellite subscription, while the UK population as a whole is more likely to have Freeview. This is perhaps not surprising, because satellite and cable services offer an array of specialist and international channels, including foreign news¹⁷.

The vast majority of Pakistani adults (91%) personally use a mobile phone, and mobile phone use is more common among Pakistani adults aged under 45, and those in ABC1 socio-economic groups. Personal ownership of mobile phones is also significantly higher than among UK adults in general.

Pakistani adults are more likely than the general UK population to live in a household that has the internet (72% compared to 62%). Internet take-up among Pakistanis is likely to continue, with one-third of Pakistani adults who do not currently have the internet at home saying they are likely to get it in the next 12 months. This compares to 15% among the UK population in general.

Despite higher take-up of media devices, Pakistanis appear to participate in fewer traditional media activities than the UK population in general. Apart from watching television, Pakistanis are less likely to say they regularly read newspapers or listen to music on a stereo. However, they are as likely to use the internet and to listen to music on an MP3 player, and are more likely to use their mobile regularly.

Pakistani adults who are under 45, ABC1s, males and those without children, are all more likely than others to participate in regular media activities, particularly digital ones.

¹⁷ See Ofcom research report *New News, Future News* published 26 June 2007
<http://www.ofcom.org.uk/research/tv/reports/newnews/>

Television is central to the lives of Pakistani adults; it is the media activity they would miss the most. However, Pakistanis are significantly more likely than the UK average to say they would miss their mobile phone most – a reflection of the under-45 age profile of the Pakistani population.

Pakistani adults say they spend an average 13.5 hours per week online, significantly more than the UK average (12.1 hours). The top three activities they do online are: communication, looking for information for work and studies, and financial transactions, although conducting financial transactions online is still lower than in the UK population as a whole.

Pakistani adults are more likely than the UK population on average to download entertainment content from the internet. They are more likely to listen to or download music, watch or download short video clips and longer videos.

The younger profile of Pakistani adults contributes to the higher proportion of people who use another media device at the same time as watching television or using the internet – the most popular activity is talking on the phone.

Understand

We investigated two areas that contribute to *understanding* in media literacy: interest in, and confidence in using, a variety of functions offered by media devices. We also asked about the concerns people have about media content and the devices themselves.

The table below summarises the percentage of owners or users who expressed interest in any one of a number of functions on each platform. The second half of the table summarises the proportion of adults who say they have concerns about the media covered in this report.

Table 5: Key understand measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
Interest in...					
digital TV functions	77%	79%	85%	91%	67%
digital radio functions	68%	72%	77%	78%	61%
internet functions	100%	98%	98%	100%	97%
mobile functions	98%	95%	98%	97%	94%

Concerns					
TV	65%	73%	73%	60%	55%
Radio	35%	34%	42%	32%	12%
Internet	65%	69%	64%	65%	63%
Mobile	57%	57%	57%	48%	34%
Gaming	37%	46%	41%	38%	30%

Pakistani adults expressed greater interest in the interactive functions on digital television and radio, and had greater confidence in carrying them out, compared with UK adults overall. A higher proportion of people say they are interested - but not confident - in selecting digital television viewing angles.

There is some variation between interest and confidence, across several internet functions. Pakistanis are more likely than the overall UK population to say they are interested in banking online, installing security features and finding out about local services. In comparison, UK adults overall are more likely to say they are interested in buying things online. For all other functions there are few differences between Pakistanis and the UK population in general. With respect to mobile phone functions, Pakistanis are more interested than others in accessing a mobile operator's website or sending photos on their mobile.

Despite this greater use of some online functions, and the fact that seven in ten are confident they can find the content they want online, this is still lower than the UK average (91%).

Their awareness of how commercial radio stations and search engine websites are funded is similar to the UK average. However, they have lower awareness of how other content, such as television programming (BBC and commercial), BBC radio stations and the BBC website, is funded compared with the UK overall.

Pakistani adults are more likely than the UK population to say they are concerned about what is on the internet, television and the radio, and are also more concerned about mobile phones and electronic games. Whereas the UK-wide trend is for under-45s to be less likely to mention concerns than the population in general, the same age group in the Pakistani community is as likely, if not more likely, to express concerns about these media.

Pakistanis are more likely than the UK average to say they are happy providing contact details online, with the exception of providing credit and debit card details. They display caution when using new websites and are more likely to check a new website by assessing the overall look and feel of the site, by comparing information across other sites and by assessing how up-to-date the information is.

Two in five (42%) internet users say they make a judgement about how secure a website is based on whether there are professional signs (such as the padlock) and one in three use personal instinct and peer signs.

Create

We have measured people's participation in creative activities by asking internet users how confident they feel about using creative functions online and also whether they have any experience of, or interest in, creating online content. We assessed *experience* of downloading different types of programming and audio content and *interest* in activities such as uploading photos, creating a social networking profile, contributing to blogs and creating videos that are later uploaded.

Table 6: Key create measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
Confidence in creating content	62%	64%	59%	62%	66%

Two in three users are confident that they can create content, and this is higher among males. One in three has uploaded photos onto the internet and around three in ten have social networking profiles.

Nearly half of all Pakistani adults have experience of learning about media; significantly higher than among UK adults overall. A similar proportion have a preferred learning strategy; this is likely to be either trial and error, or learning from friends and family. Under-45s are more likely to have a preferred learning strategy than over-44s.

5.2 Access

This section looks at take-up of digital television, internet and mobile phones, non-internet owners' intention to get the internet, what people use the internet for, the regular media activities of adults, the media activity that they would miss the most, the extent to which other media devices are used at the same time as watching television or using the internet, and people's main reasons for using media devices.

We make comparisons between the Pakistani adults surveyed in the Ofcom Ethnic Minority Groups Media Literacy Audit and a representative sample of UK adults surveyed in the Ofcom Adult Media Literacy Audit.

In most figures, data are shown for the total adult UK population and for the adult Pakistani population. The demographic breakdown (age, socio-economic group, gender and presence of children) is shown for the Pakistani adult population.

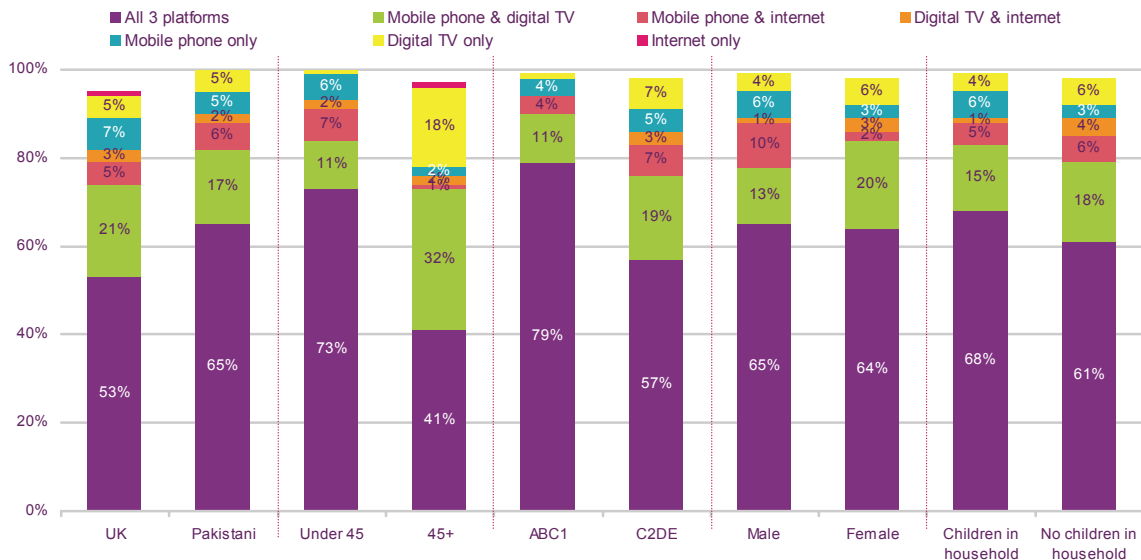
Two-thirds of Pakistani adults live in households with multimedia access – significantly more than the UK population as a whole

Figure 74 illustrates the proportion of households that have digital television, the internet and mobile phones.

Nine in ten (90%) Pakistani households have more than one media device (digital television, the internet and mobile phone) and two-thirds have all three media devices.

Within the Pakistani adult population, ownership of all three devices is more common among under-45s and those in ABC1 socio-economic groups.

Figure 74: Multiple platform ownership: digital television, mobile phone and the internet



T1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5? Does anyone in your household have access to the internet at home through a computer or laptop? Do you personally use a mobile phone?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 153 Pakistani male, 147 Pakistani female, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The percentage of Pakistani households that have multiple media devices is higher than in the general UK population (82%).

The majority of Pakistani adults have digital television

Nine in ten Pakistani adults have digital television at home (89%). Take-up is higher among females, but otherwise the level of ownership does not differ to any significant extent across the different demographic groups within the Pakistani adult population.

Figure 75: Home ownership of digital television



T1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 153 Pakistani male, 147 Pakistani female, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Take-up of digital television is higher among Pakistani adults than in the general UK population (89% compared to 82%). Take-up of digital television among under-45s is at a similar level for Pakistani adults (87%) and all-UK adults (89%).

There are differences between the ways Pakistanis tend to receive their digital service and the UK average. Four in five (81%) Pakistani adults receive their digital television through a satellite or cable service, compared with just over half (56%) of UK adults. As a consequence, take-up of Freeview is lower among Pakistani adults than the UK average (11% compared to 30% of all UK adults).

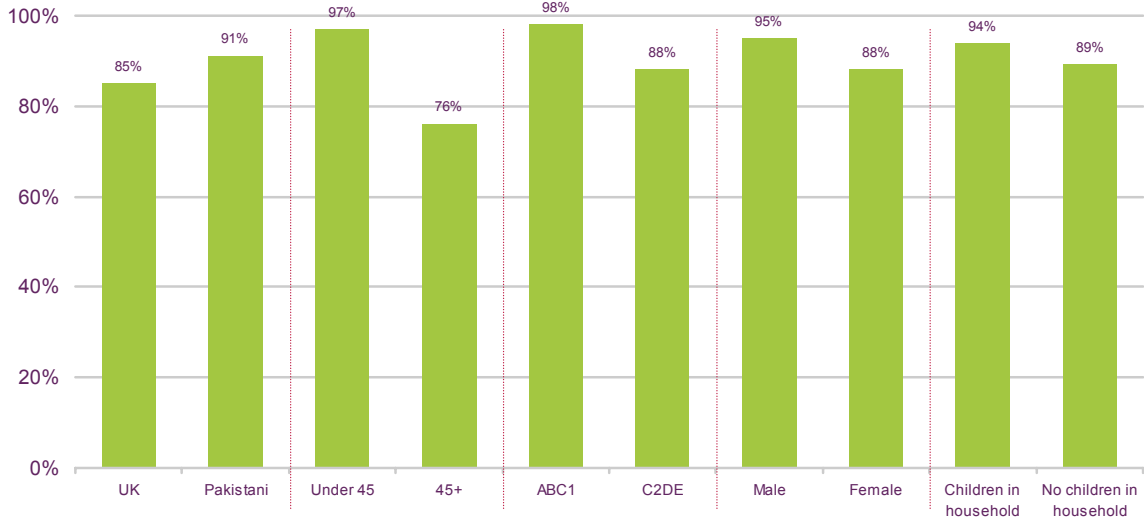
The higher level of take-up of pay-TV among the Pakistani population is unsurprising, as these channels offer a broad range of international and specialist channels. These findings are consistent with other research conducted by Ofcom.

The vast majority of Pakistani adults have a mobile phone

Nine in ten (91%) Pakistani adults personally use a mobile phone.

Mobile phone use is more common among Pakistani adults aged under 45 and those in the ABC1 socio-economic groups.

Figure 76: Take-up of mobile phone



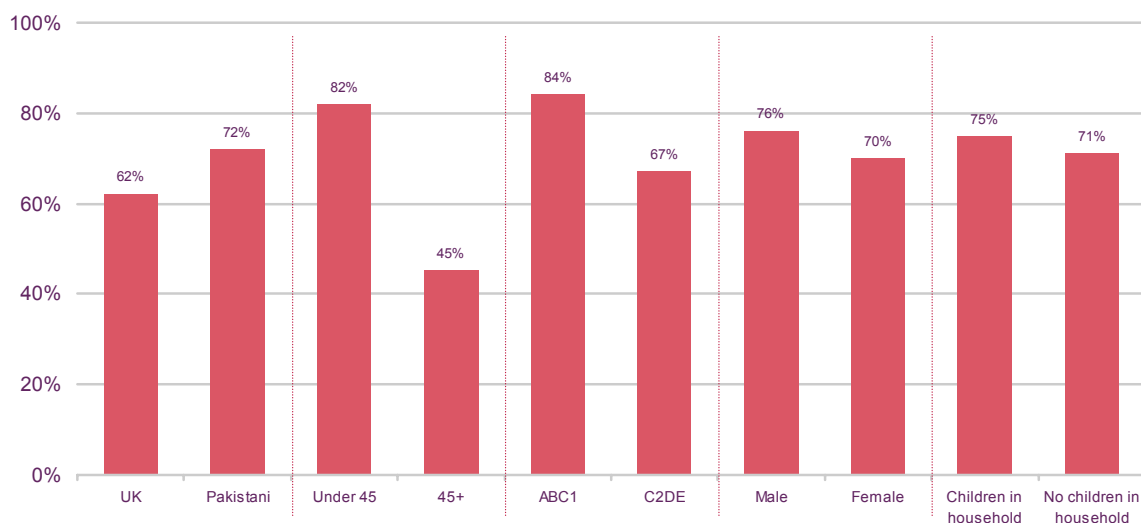
M1 – Do you personally use a mobile phone?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 153 Pakistani male, 147 Pakistani female, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Personal ownership of mobile phones is significantly higher than the UK population average (85%). The higher level of take-up is influenced by a younger age profile among Pakistanis, as take-up of mobile phones among younger adults is at similar levels for under-45 Pakistani adults (97%) and under-45 UK adults (96%).

Internet penetration is higher among the Pakistani population than as a whole, with just under three-quarters of Pakistani adults living in a household with internet access

Nearly three-quarters of Pakistani adults have the internet at home, with some variation by demographic group. Take-up of the internet is significantly higher among adults aged under 45 and those in ABC1 households. While there is not a significant difference in household take-up of the internet by gender, males (67%) are more likely to say they use it than females (47%).

Figure 77: Home access to the internet



IN1 – Does anyone in your household have access to the internet at home through a computer or laptop?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 153 Pakistani male, 147 Pakistani female, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Home internet access is higher among Pakistani adults than the UK average. In addition, internet access in the household is higher for Pakistani adults aged under 45 than the UK average for this age group (82% compared to 74%).

Four in five (80%) Pakistani adults with the internet at home have a broadband connection to the internet. Broadband connections are more common for Pakistani adults under 45, males and those without children in the household. Over-44s, females and those with children in the household are more likely to be uncertain about what type of internet connection they have.

Take-up of broadband (80%) in online Pakistani households is lower than the UK average (92%). This figure could be influenced by the 11% of all Pakistani adults who are uncertain about the type of connection they have.

There is potential for further increases in internet penetration in Pakistani households

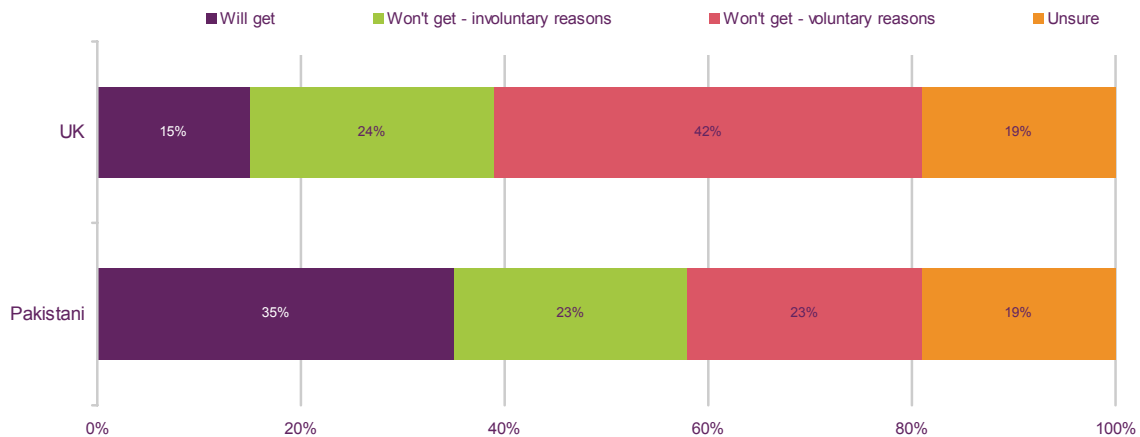
Non-ownership of the internet accounts for 28% of Pakistani adults, and is more common among those aged 45 and over (55%), and C2DE households (33%).

When those who do not currently have access to the internet at home were asked whether they intended to get internet access in the next year, over one-third expressed an interest in going online in the next 12 months. Reasons given for not getting connected were split between involuntary (too expensive/ do not know how to use it/ do not have a computer/ too difficult to use) and voluntary (not interested/ no need).

One in five had not made up their minds and were unsure whether they would be getting the internet or not.

Note: The base size for those without internet access at home is low so the data in Figure 78 are indicative only.

Figure 78: Intention to get the internet at home



IN18/ IN20 – Can you tell me if you intend to get internet access at home in the next year or so? And can you tell me why that is?
 Base: All adults aged 16+ who do not have internet access at home (1222 UK, 80 Pakistani) NB LOW BASE SIZE FOR PAKISTANI ADULTS
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

There is a higher intention to get the internet in the next 12 months among Pakistani adults than among the UK population overall.

There is a higher level of voluntary lack of interest (reasons such as not interested/ no need) in getting the internet among the UK population than among the Pakistani population. This confirms that Pakistani households have a stronger interest in being online.

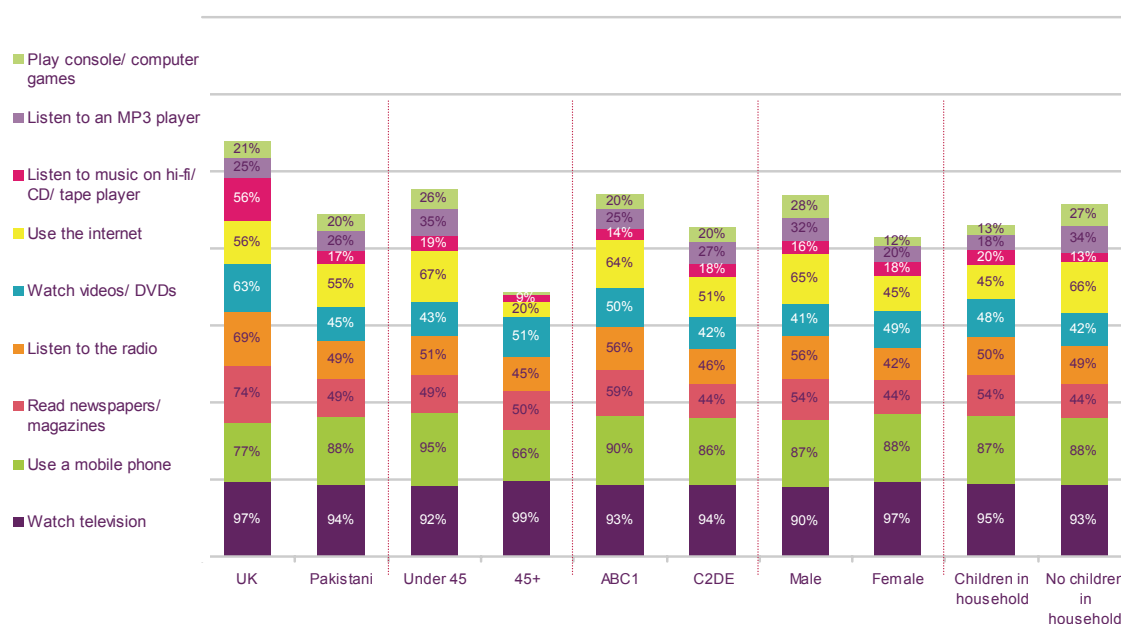
Watching television is the most common media activity in Pakistani homes

Figure 79 shows which media activities people participate in regularly.

The most common media activities are watching television and using a mobile phone. Regular use of mobile phones, the internet, MP3 players and computer/ console games is much more common in the Pakistani population among under-45s, and, albeit to a lesser extent, among ABC1s and males. As a result, Pakistani under-45s, ABC1s and males partake of a broader range of media activities.

Watching television regularly is more common among Pakistani adults over 45 and females, but otherwise it does not vary significantly across the various demographic groups.

Figure 79: Regular media activities



A1 – Which of the following do you regularly do?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 153 Pakistani male, 147 Pakistani female, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Pakistani adults are more likely to use a mobile than the average for all UK adults. However, UK adults are more likely to make regular use of the more traditional media: reading newspapers or magazines, listening to radio, watching videos or DVDs, and listening to music on a hi-fi/ CD or tape player. The proportion of adults who regularly watch television does not differ between UK adults and Pakistani adults. Because of the lower use of the more traditional media among Pakistani adults, it appears that overall Pakistani adults are conducting fewer media activities regularly.

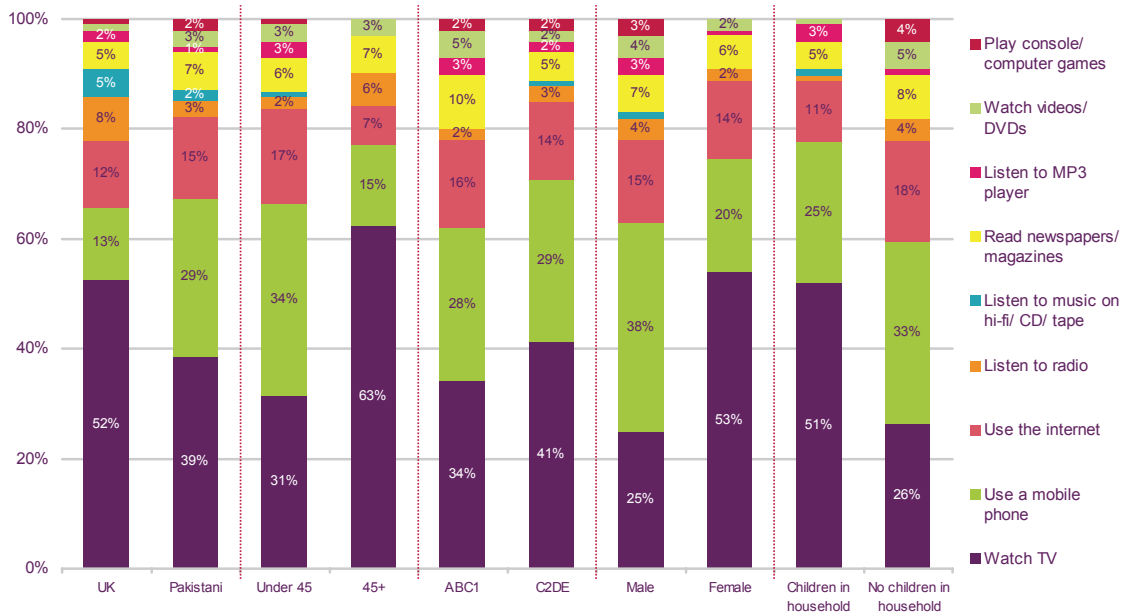
Looking specifically at the under-45s, there is no difference in terms of regularly watching television, or using a mobile phone or the internet, between Pakistani under-45s and younger UK adults.

Mobile phones are challenging television as the media device that under-45s would miss the most

Watching television is the activity that Pakistani adults would miss the most, followed by using a mobile phone.

There are some interesting demographic differences on this measure. Younger Pakistani adults are much less likely than the average to say they would miss watching television, and are more likely to miss using a mobile phone or the internet, compared to Pakistani over-44s. The proportion of all Pakistani adults saying they would miss using a mobile phone reflects the younger age profile of the population. Pakistani females, and those in households with children, are more likely to miss watching television, while males are more likely to miss using a mobile phone.

Figure 80: Most-missed media activity



A2 – Which one of these would you miss doing the most?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 153 Pakistani male, 147 Pakistani female, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Although television is the device many Pakistani adults say they would miss the most, fewer say this than in the UK population as a whole. The importance of mobile phones is evident among Pakistani adults; they are more likely than UK adults to say they would miss their mobile phone the most.

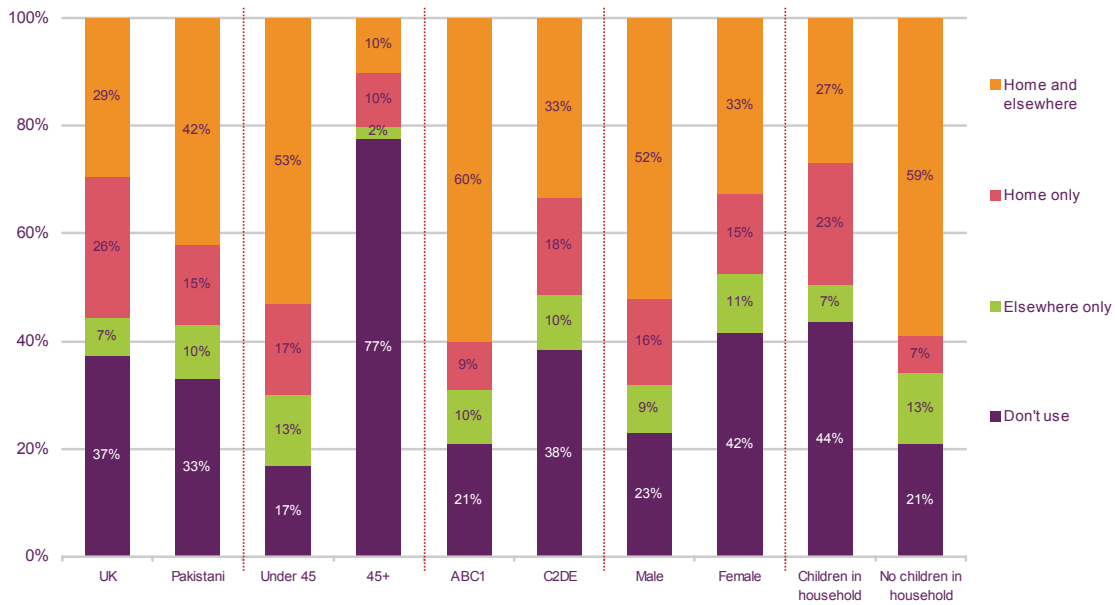
Pakistani adults under 45 are less likely to say they would miss watching television and more likely to say they would miss using a mobile phone, compared to UK under-45 adults overall.

Two-thirds of Pakistani adults use the internet at home and elsewhere

Two in three (67%) Pakistani adults use the internet, with around three in five of these (57%) using the internet at home and half (52%) using the internet elsewhere. The majority of use outside the home is in the workplace.

Use of the internet is more common among Pakistani adults aged under 45, those in ABC1 socio-economic groups, males, and those without children in the household.

Figure 81: Where the internet is used

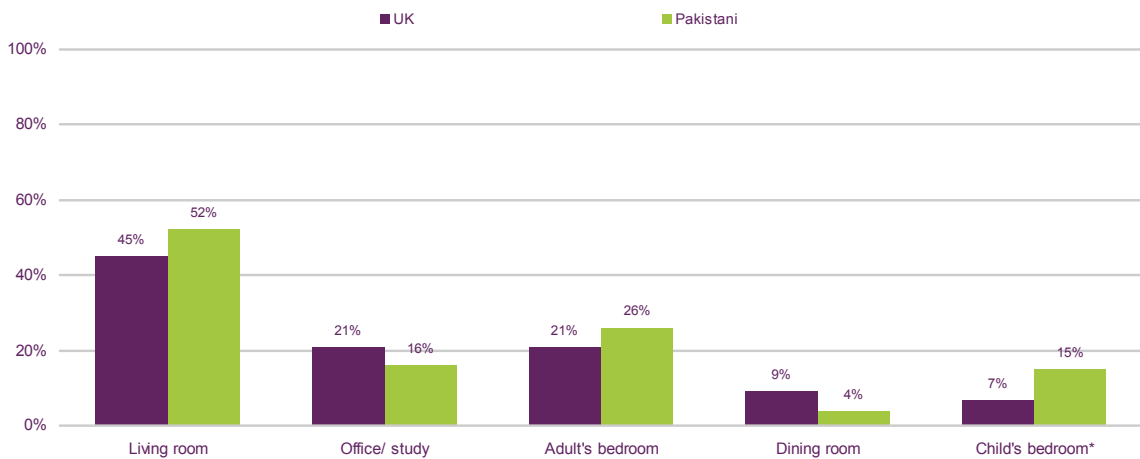


IN1/ IN5 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 153 Pakistani male, 147 Pakistani female, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Use of the internet is at a similar level to the UK population in general, but Pakistani adults are more likely to use the internet both at home and elsewhere. This accounts for three in five internet users, compared to around half of internet users in the overall UK population.

Pakistani adults with internet access at home tend to have access in just one room - the most common location is the living room.

Figure 82: Location of home computer with internet access



IN2 – Where are the computers in your home?
 Base: Adults aged 16+ with internet access at home (1683 UK, 220 Pakistani)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007
 * Base: Adults aged 16+ with internet access at home who have children (1002 UK, 119 Pakistani adults)

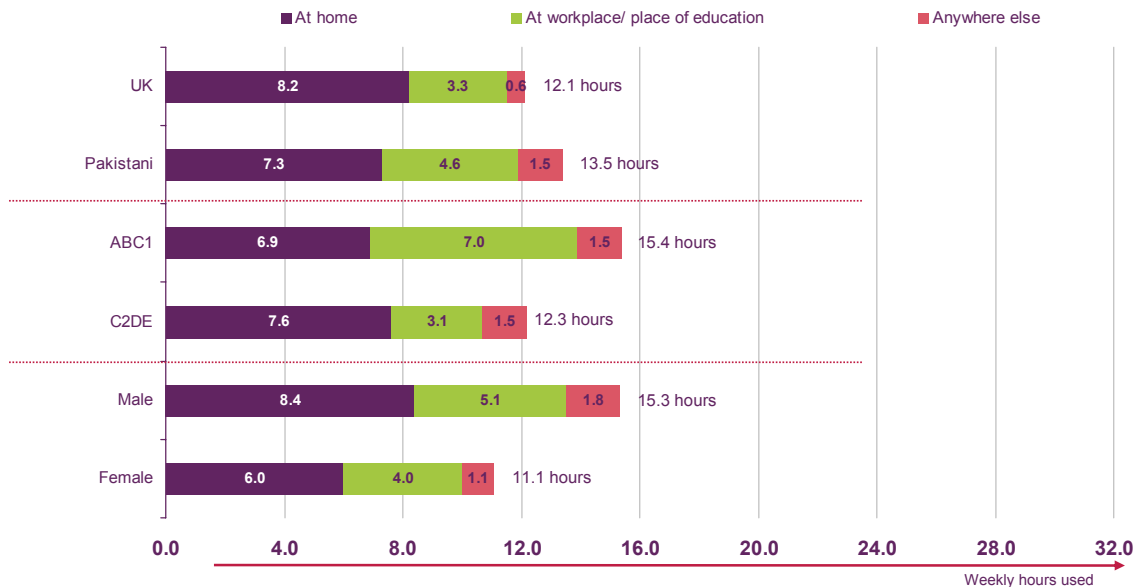
The proportion of Pakistani households who have access in just one room at home is broadly similar to the general UK population (80% compared with 84%).

Pakistani internet users spend more time online than the UK average

Pakistani adults use the internet on average for 13.5 hours per week; higher than the UK average of 12.1 hours. Nearly half of this use (6.1 hours per week) takes place outside the home.

There is a higher volume of use among ABC1s and males. It is not possible to make this comparison by age, due to the low base of Pakistani internet users over 45.

Figure 83: Volume of internet use per week



IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 199 Pakistani, 125 Pakistani ABC1, 74 Pakistani C2DE, 114 Pakistani male, 85 Pakistani female) NB BASE SIZE TOO LOW FOR ANALYSIS BY AGE, LOW BASE SIZES FOR PAKISTANI C2DE AND FEMALE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

The top three online activities are communication, finding information for work or studies, and transactions

All adults who use the internet were prompted with a list of 18 possible uses of the internet and were asked to say, for each one, whether this is something they did, and how often.

The 18 possible uses have been grouped into eight themes, in order to assess 'breadth of use' of the internet; the extent to which they use the internet for a variety of purposes:

- communication - uses such as sending or receiving email or using online chat rooms or instant messaging (IM);
- work/ studies information - finding information online for work or for studies;
- transactions - banking or paying bills, using auction sites or buying things online;
- news - looking at news websites;
- creativity - using social networking sites (such as MySpace, Bebo, and Facebook) or maintaining a website or weblog;
- entertainment - listening to radio, playing games online or looking at adult-only websites;

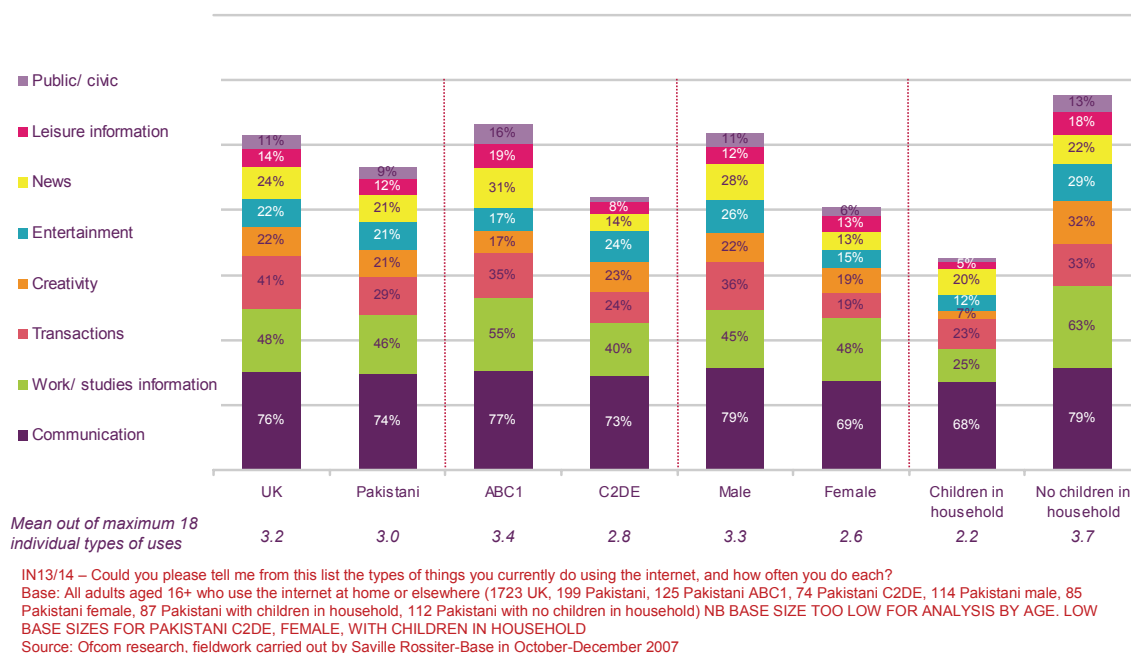
- leisure information - finding information for leisure time including cinema and live music or information for booking a holiday; and
- public/ civic - finding out about public services or looking at political/ campaign/ issues websites.

Figure 84 shows the proportion of internet users who use the internet for each of these activities at least once a week. The average of the original 18 possible uses is also shown.

The three main uses of the internet among Pakistani internet users are communication, finding work/ studies information and conducting transactions. Communication is the most common weekly activity.

Within the Pakistani population a broader use of the internet is evident for those in the ABC1 socio-economic group, males and those without children in the household. Again, it is not possible to make this comparison by age, due to the low base of Pakistani internet users over 45.

Figure 84: Internet activities carried out at least once a week



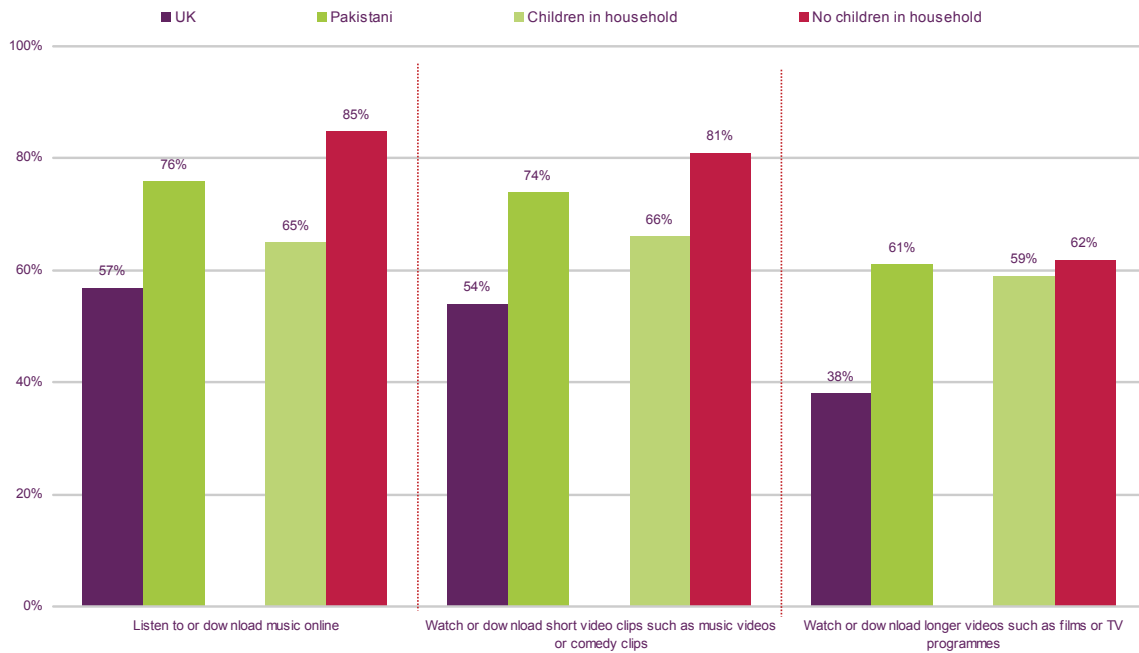
Breadth of use of the internet is at a similar level for Pakistani adults and all UK adults, although fewer Pakistanis conduct transactions on the internet than the UK average. This difference is mainly due to lower use of internet banking, shopping online and bill paying.

A large majority download or watch entertainment content online

The majority of Pakistani internet users say they access entertainment content online or download it from the internet. Three in four claim to listen to or download music, or watch or download video clips, and three in five claim to watch or download longer video content.

Using the internet in this way is more common among those without children in the household, and under-45s.

Figure 85: Using the internet to watch or download video content



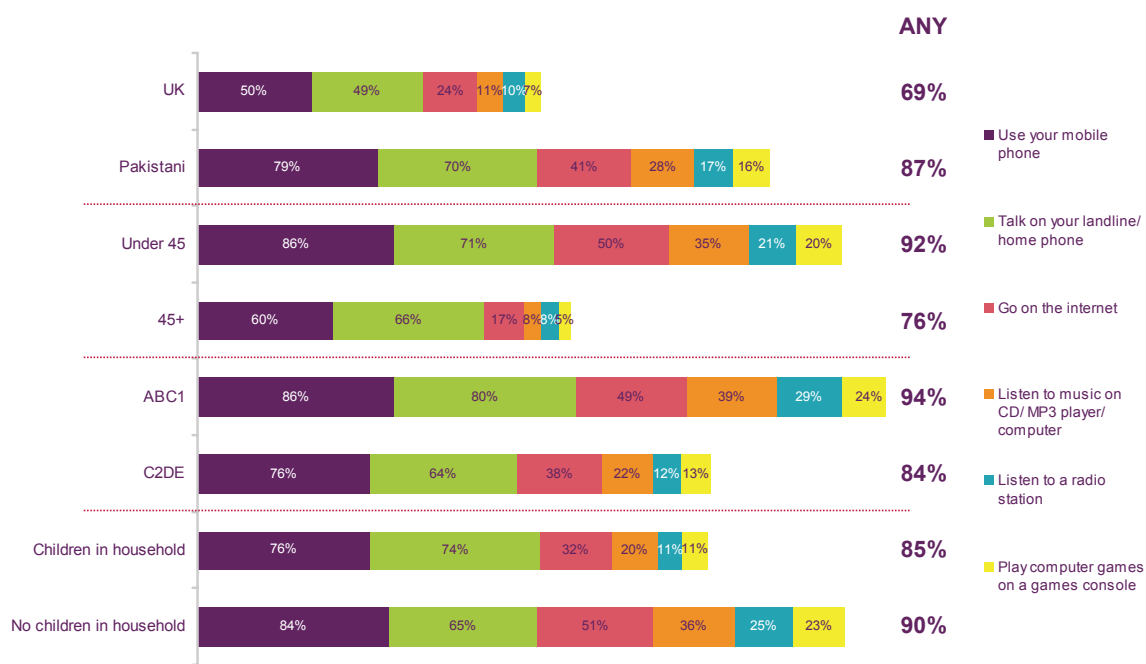
IN15A-C – I am now going to read out some things that can be done on the internet, and would like to know how often, if at all, you do each one
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 199 Pakistani, 87 Pakistani with children in household, 112 Pakistani with no children in household) NB BASE TOO LOW FOR ANALYSIS BY AGE, LOW BASE SIZE FOR CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Accessing entertainment content is more common, in each case, than among the total UK population. The greatest difference relates to watching longer videos such as films or television programmes. In addition, among internet users aged under 45, using the internet to watch or download content is more common in the Pakistani population than in the UK population overall.

Most Pakistani adults use another media device while watching television

Nearly nine in ten (87%) Pakistani adults say they ‘ever use’ other media while watching television. The other media devices they are most likely to use are mobiles, landline phones or the internet. Concurrent use of other media devices while watching television is more common among under-45s, those in ABC1 households and in households with children.

Figure 86: Using another device while watching television



T3A-F – Do you ever watch TV at home and do these other things at the same time? Is that most times or sometimes when you watch TV?
 Base: All adults aged 16+ with a TV in the household (2887 UK, 294 Pakistani, 195 Pakistani under 45, 99 Pakistani 45+, 166 Pakistani ABC1, 127 Pakistani C2DE, 147 Pakistani male, 147 Pakistani female, 156 Pakistani with children in household, 138 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Using another media device while watching television is more common among Pakistani adults than among the UK adult population (69%). Other research conducted by Ofcom¹⁸ showed that Pakistani adults are more likely than all UK adults to have one television set in the household rather than multiple sets (57% compared with 30%). Having one television set in the household may have an impact on using other media devices at the same time as watching television.

Pakistanis under 45 are more likely to do this than the same age group in the UK population (92% compared with 83%).

Most people use another media device while using the internet

Over nine in ten (95%) Pakistani adults use other media while using the internet. Again, the most likely other media activities are using a mobile phone or landline.

Using other media devices while using the internet is more common among those without children in the household, with this group likely to be under 45.

¹⁸ *Communications Market Special Report – Ethnic minority groups and communications services, June 2007*

Figure 87: Using another device while using the internet



IN4A-F – Do you ever use the internet at home and do these other things at the same time? Is that most times or sometimes when you use the internet?
 Base: All adults aged 16+ who use the internet at home (1514 UK, 171 Pakistani, 77 Pakistani with children in household, 94 Pakistani with no children in household) NB BASE SIZE TOO LOW FOR ANALYSIS BY AGE. LOW BASE SIZE FOR PAKISTANI WITH/ WITHOUT CHILDREN IN HOUSEHOLD
 Source: Ofoom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

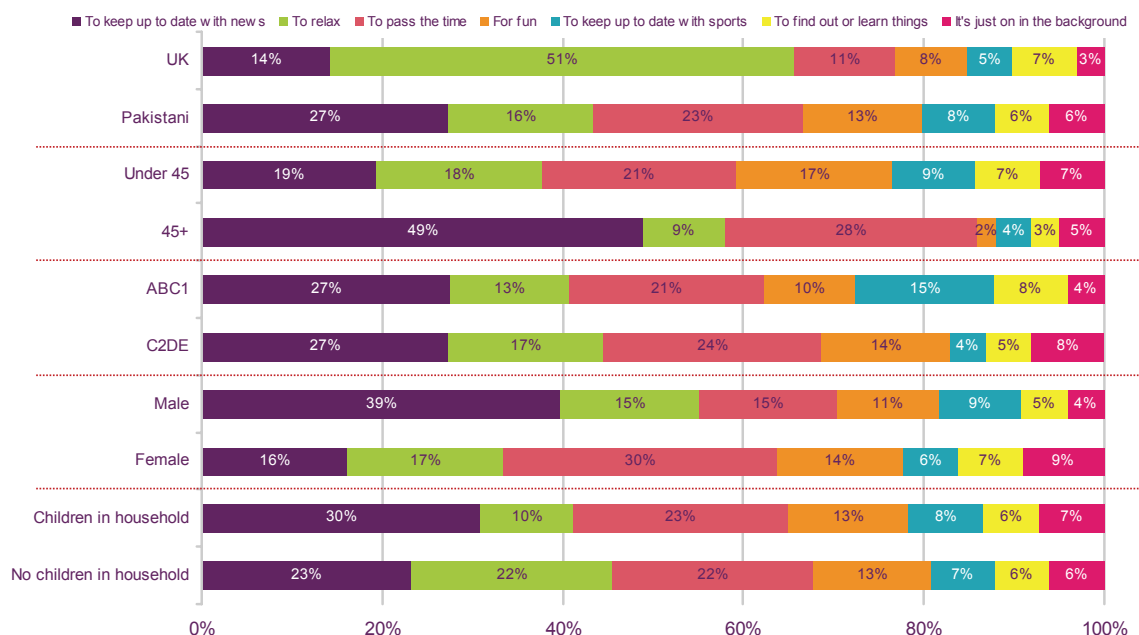
Using more than one media device while using the internet is more common among Pakistani adults than among the total UK population (74%). This is not wholly explained by the younger profile of Pakistanis; under-45s are more likely to do this than the same age group in the UK population (96% compared with 84%).

People use media platforms for a variety of reasons

The most common reasons cited for watching television are: to keep up to date with news, to pass the time, and for relaxation.

Responses differ to some extent by age, with over-44s more likely to watch mainly to keep up with news.

Figure 88: Main reason for watching television



T20 – Which one is your main reason for watching TV?
 Base: Adults aged 16+ with a TV in the household (2887 UK, 294 Pakistani, 195 Pakistani under 45, 99 Pakistani 45+, 162 Pakistani ABC1, 131 Pakistani C2DE, 147 Pakistani male, 147 Pakistani female, 156 Pakistani with children in household, 138 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Pakistani adults are more likely to say that their main reason for watching television is to keep up with news or to pass the time, while UK adults are more likely to watch it to relax. Compared to UK adults under 45, Pakistani adults of the same age are more likely to watch mainly to keep up with news (19% compared with 8%).

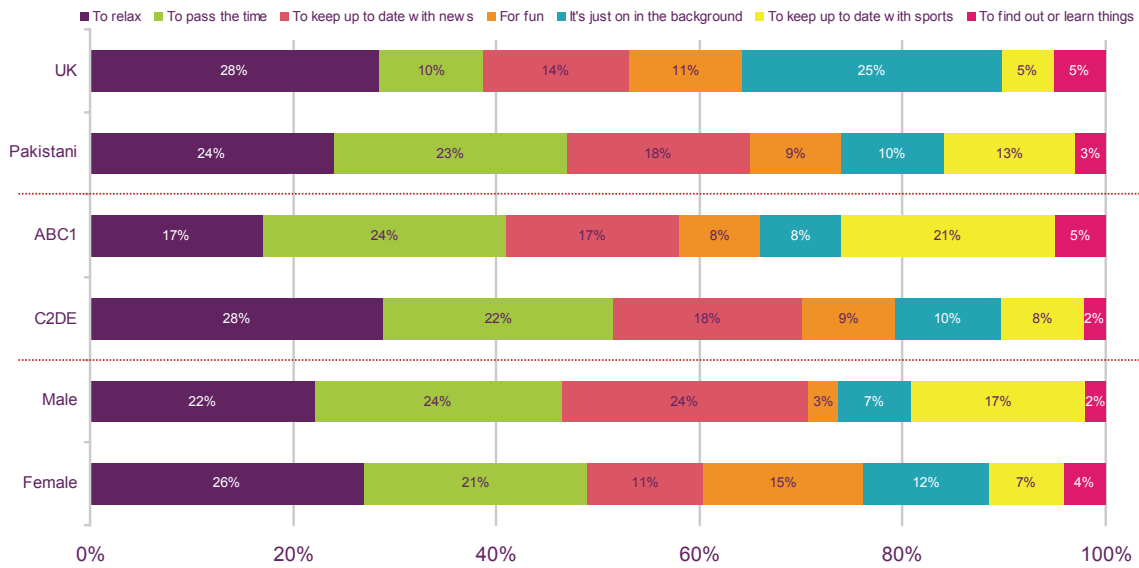
Diverse reasons are given for listening to the radio

Three in five Pakistani adults listen to the radio at home (59%), one-third of adults listen through an FM/ AM radio (35%), and nearly one in five adults listen through DAB radio (17%).

There are a variety of main reasons for listening to radio, with the two most popular being to pass the time and to relax.

Listening to the radio to keep up to date with sports is more common among ABC1s and males. The low base size for Pakistani adults over 45 who listen to the radio makes it impossible to compare responses by age.

Figure 89: Main reason for listening to the radio



R14 – Which one is your main reason for listening to radio?
 Base: Adults aged 16+ who listen to radio at home (2043 UK, 180 Pakistani, 106 Pakistani ABC1, 73 Pakistani C2DE, 97 Pakistani male, 83 Pakistani female) NB
 LOW BASE SIZE FOR PAKISTANI C2DE, MALE, FEMALE, BASE SIZE TOO LOW FOR ANALYSIS BY AGE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Listening to the radio is less common among Pakistani adults compared to the UK average (73%), and fewer adults listen through an FM/ AM radio (35% compared with 62%). Listening to digital radio is more common, however, through higher use of DAB radio (17% compared with 13%).

Pakistani adults are more likely to listen to the radio to pass the time, while UK adults are more likely to just have the radio on in the background.

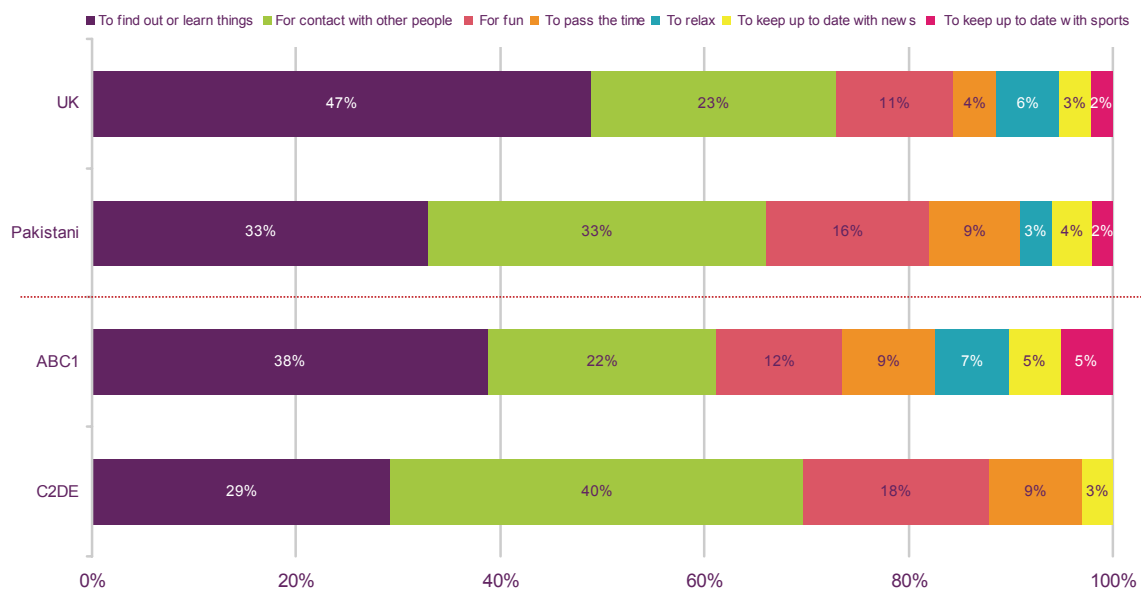
As with television viewing, Pakistani adults under 45 are more likely to listen mainly to keep up with news, compared to the same age group in the general UK population (19% compared with 10%).

Finding out or learning new things, and contact with other people, are the most common reasons for using the internet

The two most popular reasons for using the internet among Pakistani adults are to find out or learn things, and for contact with other people.

Users in C2DE socio-economic groups are more likely to say their main reason for using the internet is for contact with other people, while those in ABC1 socio-economic groups have more diverse reasons for using the internet.

Figure 90: Main reason for using the internet



IN51 – Which one is your main reason for using the internet?
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 199 Pakistani, 124 Pakistani ABC1, 75 Pakistani C2DE) NB LOW BASE SIZE FOR PAKISTANI C2DE, BASE SIZE TOO LOW FOR ANALYSIS BY AGE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

The two most popular main reasons for using the internet do not differ between Pakistani adults and the UK average.

Compared to under-45 UK adults overall, however, under-45 Pakistani adults are more likely to use the internet mainly for contact with other people (33% compared with 23%).

5.3 Understand

This section looks at interest and confidence in using digital services, attitudes towards the role of media and platform content, trust in television and internet content, checks and judgements made when visiting new websites, and concerns about platforms.

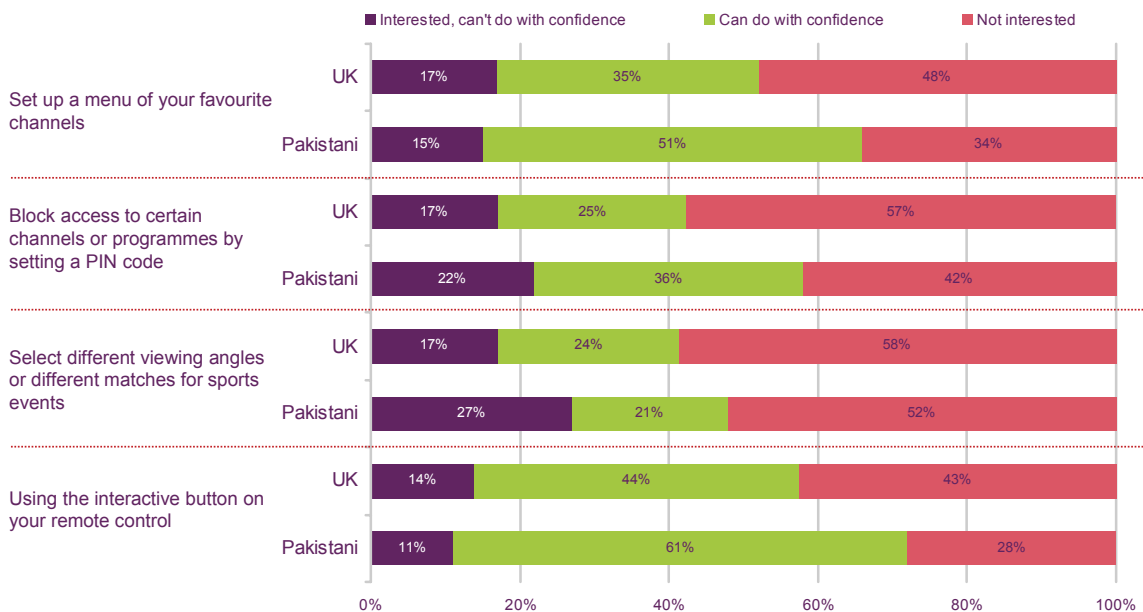
High levels of interest and confidence in using digital functions and services

Those with a digital television service at home (89%) were prompted with four different functions available through digital television. For each function they were asked how interested they were and whether they could do the task with confidence. Figure 91 splits all digital television owners into one of three groups for each of the four functions; those who are not interested, those who are interested and can do it with confidence, and those who are interested but cannot do it with confidence.

Over half of all Pakistanis who have digital television are interested in using the interactive button (72%), setting up a menu of favourite channels (66%), and blocking access to certain channels or programmes by setting a PIN code (58%). Interest is higher among adults aged under 45 and among males.

Most people who are interested in functions are also confident about using them, with one exception; for setting different viewing angles or different matches for sports events, a higher proportion say they are interested, but not confident.

Figure 91: Interest and confidence in using digital television services



T4 – I'm going to read out some different types of things you can do with some types of digital television, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ with multichannel TV (2351 UK, 269 Pakistani)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Interest in digital television services is higher among Pakistani adults than among UK adults as a whole. And interest in any of the functions among Pakistani adults under 45 exceeds that for all UK adults of a similar age (87% compared with 75%).

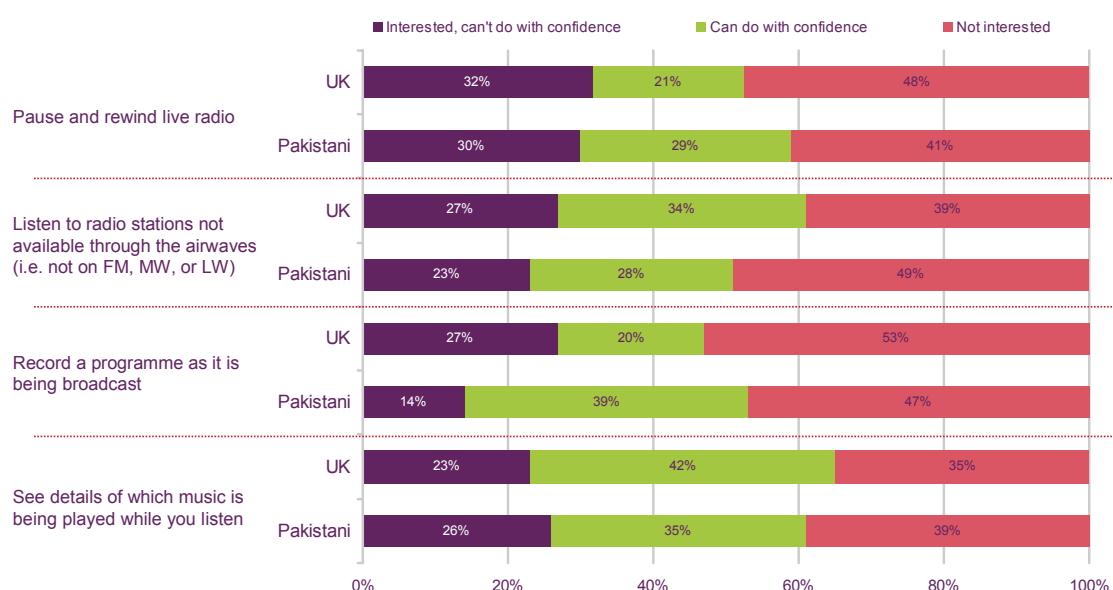
Interest in DAB radio functions is lower than for other media devices

The proportion of Pakistani adults interested in DAB radio functions is lower than the proportion that express interest in other platforms, although some level of interest is expressed by at least half of all Pakistani adults. The highest level of interest is in seeing details of the music, and pausing and rewinding the radio as it is being played.

Levels of confidence are lower compared to the other media, in particular in pausing and rewinding live radio, and in listening to stations not available through FM/ AM radio sets.

It is important to note that several of these functions are specific to certain models of DAB radio rather than to digital radio more generally; this may have suppressed interest and confidence levels.

Figure 92: Interest and confidence in using DAB radio sets



R3 – I'm going to read out some different types of things you can do with some kinds of digital radio, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ who listen to digital radio at home (766 UK, 115 Pakistani)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

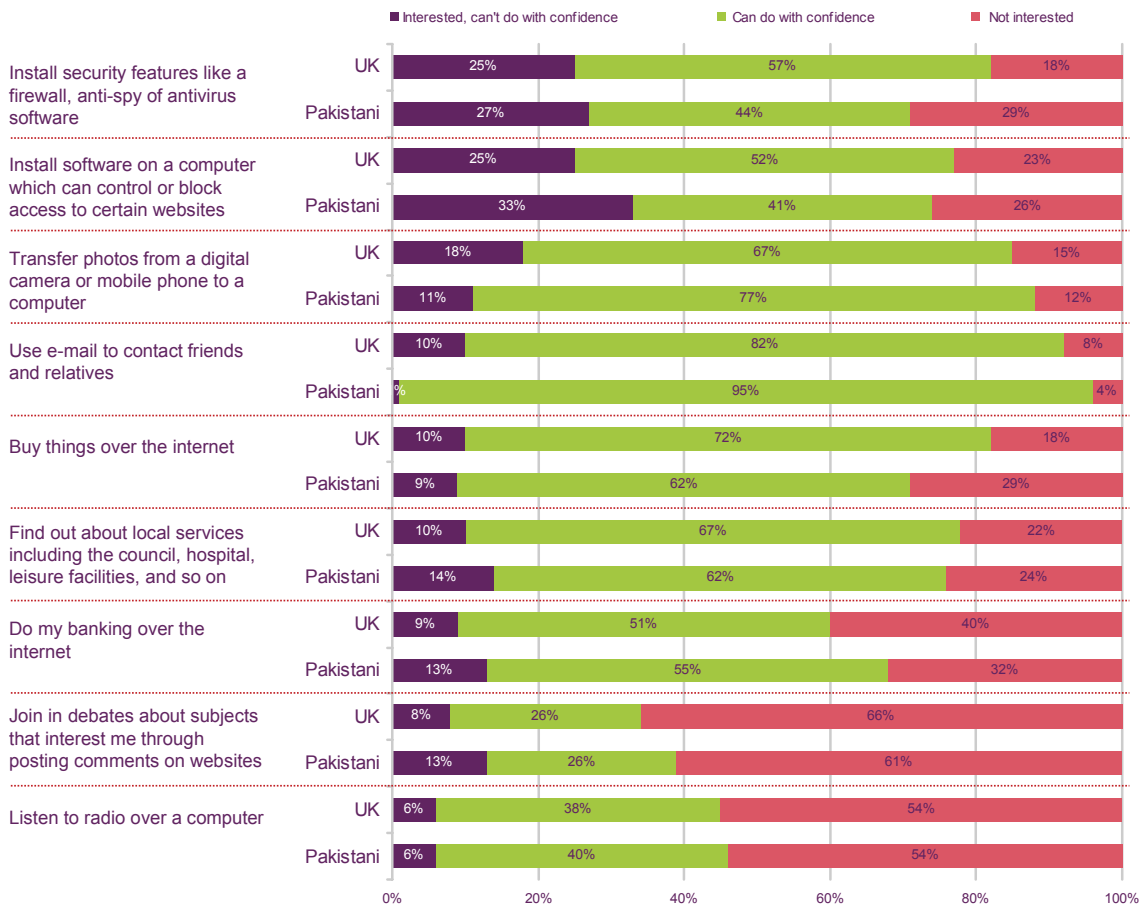
Interest in two of the four functions is higher among Pakistani adults who listen to digital radio than among the general UK population; pausing and rewinding live radio, and recording a programme as it is being broadcast.

Pakistani adults have high levels of interest in internet functions and high levels of confidence for many activities

Those who use the internet at home or elsewhere (67%) were prompted with nine tasks or functions they could carry out on the internet or a PC/ laptop. Seven of the nine tasks or functions are of interest to at least half of all Pakistani adults. Interest is highest in using email and in transferring photos to a computer.

Most people who are interested in a task or function are also confident in carrying it out. However, a higher proportion say they are interested, but not confident, in installing blocking software or security features, and in joining in debates online.

Figure 93: Interest and confidence in using internet functions



IN7A-I – Please look at the options shown on this card. I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I'd like you to say which of the options on the card applies to you.
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 199 Pakistani)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

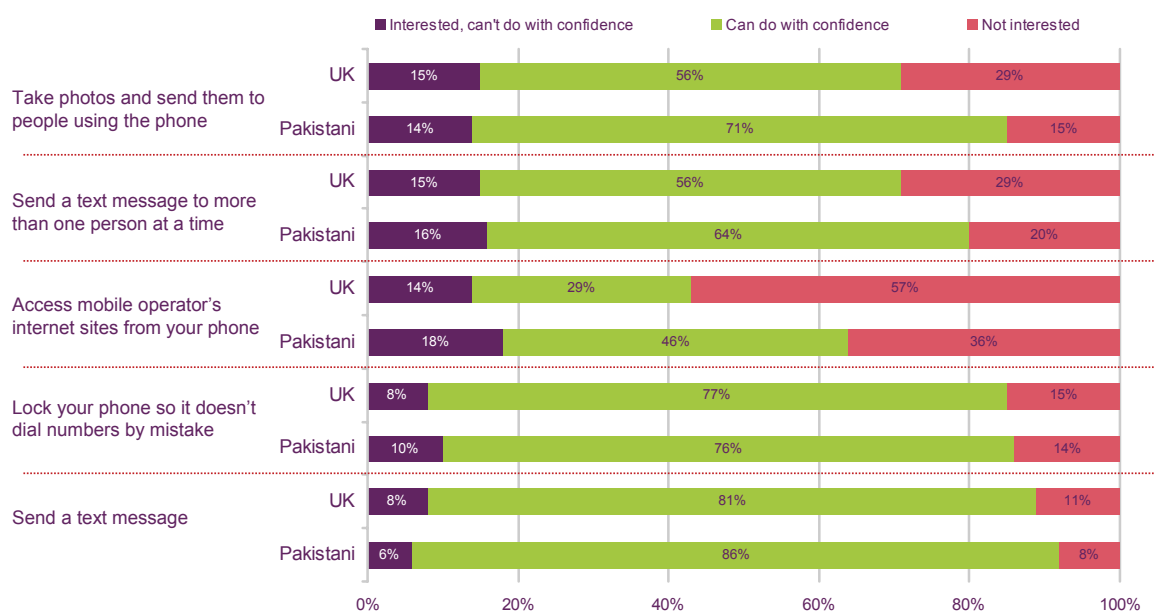
There are some differences in this area between Pakistani adults and the UK population as a whole. Pakistani adults are more interested in using email to contact friends and relatives, and in joining in debates through posting comments online. In contrast, UK adults are more interested in buying things online and installing security features. This lower level of interest in buying things online supports the earlier finding that Pakistani adults are less likely to use the internet for transactions than are UK adults.

High levels of interest in mobile phone functions

All of the functions discussed were of interest to most mobile phone users; the highest levels of interest were in sending text messages, locking the phone, and sending photos via the phone. Around three in five were interested in accessing mobile operators' sites from the phone.

Most Pakistani adults who are interested in functions are also confident in using them. Across the five functions a higher proportion say they are interested, but not confident, in accessing mobile operators' websites.

Figure 94: Interest and confidence in using mobile phone functions



M4 – I'm going to read out some different types of things that you can do with some kinds of mobile phones, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ with a mobile phone (2481 UK, 276 Pakistani)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

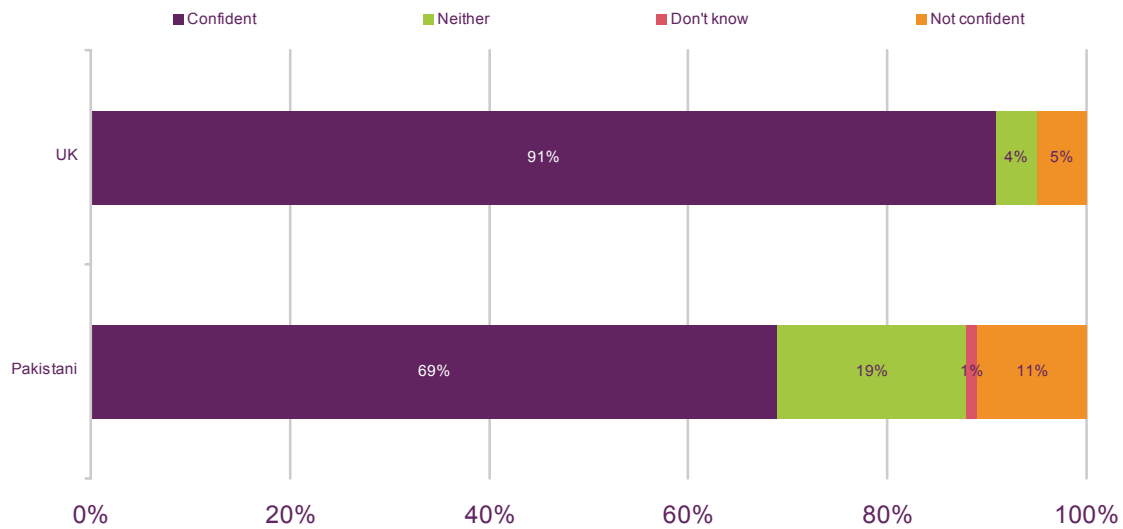
Interest among Pakistani adults is higher than in the overall UK population in three of the four interactive functions: sending photos via a mobile, sending a text message to more than one person at a time, and accessing internet sites from a mobile phone.

The majority of Pakistani adults are confident in finding information online, but have some concerns about providing personal information

The majority (69%) of Pakistani adults are confident in finding the content or information they want when they use the internet. One in ten say they are not confident and the remainder are unsure.

Confidence in finding content online does not vary to any significant extent across the demographic groups.

Figure 95: Confidence in finding content online



IN9 – How confident are you that you can find the content or information you want when you go online?
 Base: All adults aged 16+ who use the internet at home or elsewhere (1514 UK, 199 Pakistani) NB BASE SIZE TOO LOW FOR ANALYSIS BY AGE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

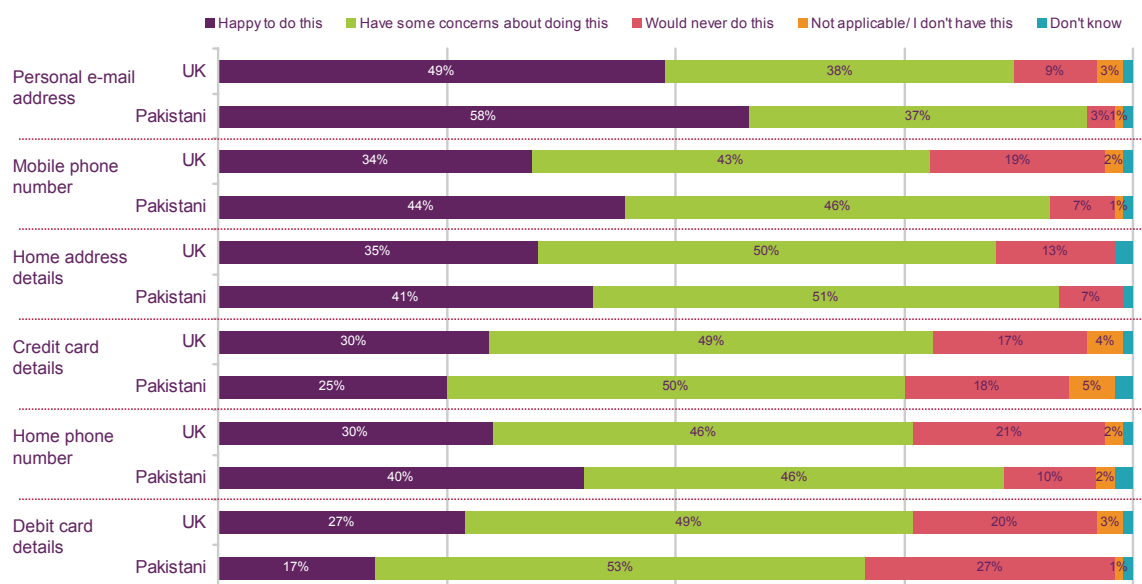
While the majority of Pakistani adults are confident in finding the content or information they want when they use the internet, the degree of confidence is lower than for UK adults (69% vs. 91%).

Confidence among Pakistani adults under 45 is also lower than the average for under-45 UK adults (72% compared with 93%).

Many Pakistani adults are willing to provide their personal email address online, but fewer are happy to provide other personal information such as phone numbers and home address

Over half (58%) of Pakistani adults are happy to provide their personal email address online and around two-fifths are willing to provide a phone number. There is considerable reluctance and concern over providing debit and credit card details.

Figure 96: Information prepared to give when registering on sites



IN41 – Please look at the options shown on this card. I'm going to read out some details about information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns.
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 199 Pakistani)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Pakistani adults are generally more open to providing personal information online than UK adults overall, with a higher proportion of internet users saying they would be happy to enter their personal email address, mobile phone number, home address or home phone number.

However, compared to all UK adults, Pakistani adults are less likely to be happy to enter their debit card details online. This higher relative level of concern may be an influence in the lower level of online purchasing by Pakistani adults.

Many Pakistani adults see the role of the internet as informative/educational

Pakistani adults are more likely to see the main role of the internet as education and information (82%) than entertainment (52%). This view is even stronger in Pakistani households with children.

Figure 97: Main role of the internet: *to entertain, or to inform and educate*



Opinions on the main role of the internet are very similar to those held by UK adults.

Awareness of funding is higher for broadcasting than for the internet

Funding of television content

BBC channels are funded by the licence fee and commercial public service broadcast (PSB) channels are funded by advertising (programme sponsorship provides a secondary revenue stream).

Funding of radio content

BBC stations are funded by the licence fee and commercial stations are funded by advertising (programme sponsorship provides a secondary revenue stream).

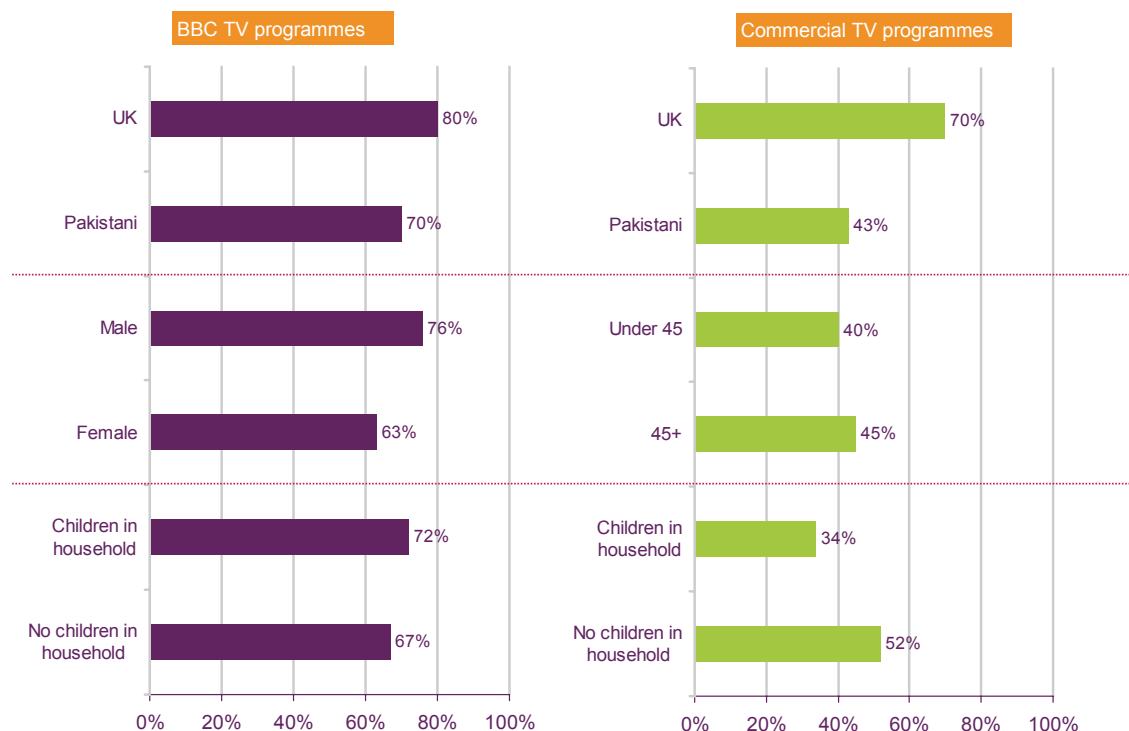
Funding of websites

The BBC website is funded by the licence fee and search engine websites such as Google are funded by advertising.

Over two-thirds (70%) of Pakistanis are aware that BBC television programmes are funded by the licence fee and over two in five (43%) are aware that commercial stations are mainly funded by advertising.

Awareness does not vary to any significant extent by socio-economic group. However, males are more likely to be aware of BBC funding than females, and those with children in the household are more likely to be aware of funding arrangements for commercial television programmes.

Figure 98: Understanding main source of television programme funding



T8/T9 – How would you say BBC TV programmes are mainly funded?/ How would you say programmes are mainly funded on ITV, Channel 4 and Five?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 159 Pakistani with children in household, 141 Pakistani with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

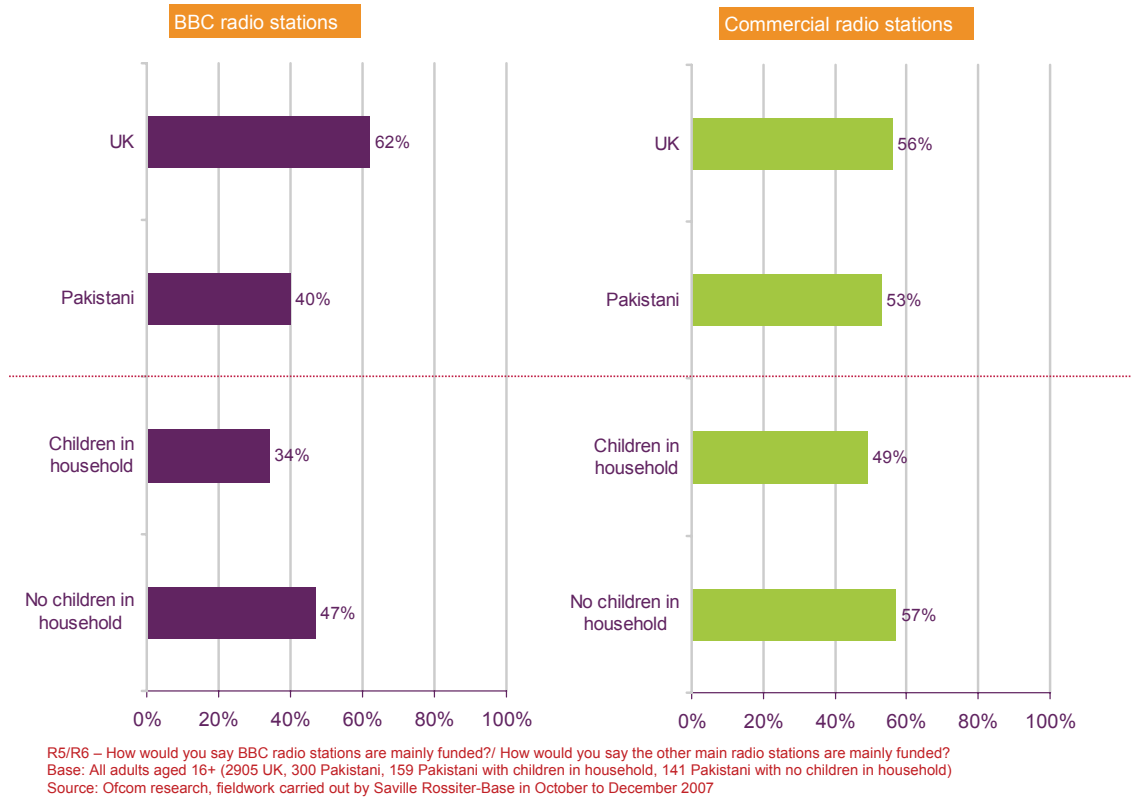
Compared to the UK population, awareness of television programme funding is lower, particularly for commercial television programming.

Among adults under 45 in the UK population, overall awareness does not differ for BBC television programme funding (72% compared with 73%), and is lower for commercial television programme funding (45% compared with 64%).

Pakistani adults’ awareness of funding for commercial radio is higher than for BBC radio

Funding awareness is higher for commercial radio programming (53%) than for BBC programming (40%), and awareness is generally higher among those without children in the household.

Figure 99: Understanding main source of radio station funding



Compared to the UK population overall, awareness of BBC radio funding is lower, and awareness of commercial radio funding is at a similar level.

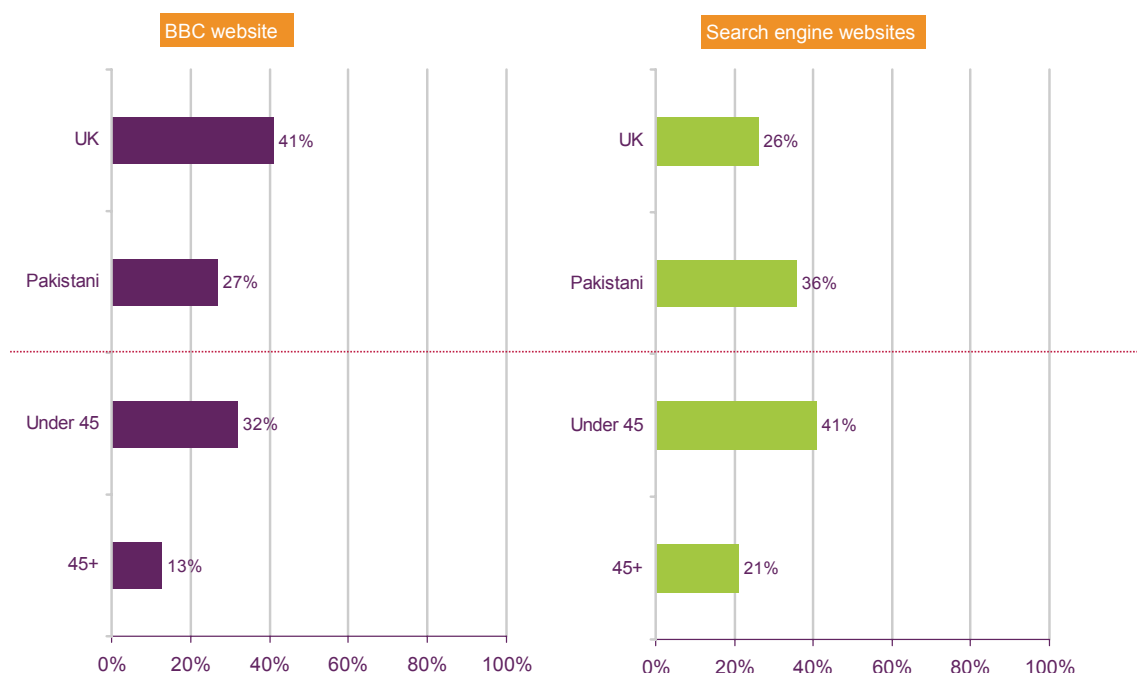
As with BBC television funding, Pakistani adults under 45 are less aware than similarly aged UK adults overall of the main source of BBC radio station funding (42% compared with 55%).

Relatively low awareness of BBC television and radio station funding suggests there is less of an association between the BBC and the licence fee among the Pakistani population.

Awareness of how search engines and the BBC website are funded is relatively low

One in three (36%) Pakistanis are aware of how search engines are funded and one in four (27%) are aware of how the BBC website is funded. Awareness of both BBC and commercial website funding is higher among the under-45s.

Figure 100: Understanding main source of website funding



IN34/ IN35 – How do you think the BBC's website is mainly funded?/ How do you think search engine websites such as Google or Ask.com are mainly funded?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Compared to the general UK population, results here are mixed; there is lower awareness of BBC website funding and higher awareness of search engine website funding. However, among adults under 45, awareness is higher in both cases.

While Pakistani adults are more aware of search engine website funding than BBC website funding, the reverse is true for UK adults overall. It may be that the association between the BBC and the licence fee is more ingrained within the UK population overall, while heavier use of the internet may have led to greater awareness of search engine funding among the Pakistani population.

A large majority of Pakistani adults are aware that television programming is regulated

Television regulatory environment

BBC channels are regulated by the BBC Trust and Ofcom and UK commercial channels are regulated by Ofcom.

Radio regulatory environment

BBC stations are regulated by the BBC Trust and Ofcom and UK commercial stations are regulated by Ofcom.

Internet regulatory environment

There is no statutory regulatory body generally responsible for audio-visual content on the internet.

The BBC Trust, established by Royal Charter, issues a service licence for bbc.co.uk which encompasses BBC iPlayer and can consider any complaints about its content.

The Association for Television On-Demand (ATVOD) is a self-regulatory body committed to protecting consumers of on-demand audio-visual content on services provided by its

members. Its current full members are BT, On Demand Group, Virgin Media, Channel 4, BBC (Affiliate Member), Tiscali, FilmFlex and ITV.

Sites based on user-generated content (UGC) are not subject to any statutory regulation, beyond the prohibition on illegal content.

Mobile phone content regulatory environment

All UK mobile phone operators comply with a voluntary code, under which they commit to controlling under-18s’ access to adult content.

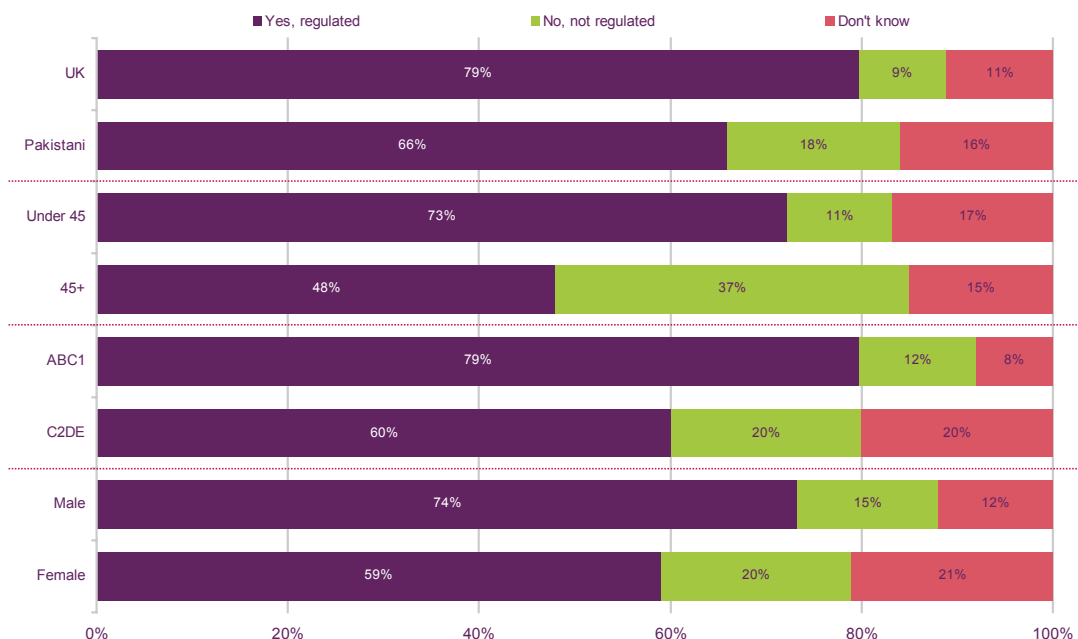
- Mobile operators have an age check system under which subscribers must show that they are 18 or over to access 18 rated content.
- In addition, a subscriber can request that the block be applied to an existing mobile number.

Electronic gaming regulatory environment

There is an industry self-regulatory framework in place for video games, under which games are voluntarily rated and labelled under the Pan European Game Information system (PEGI). PEGI ratings (3+, 7+, 12+, 16+ and 18+) provide information to consumers about the ages for whom a particular game is appropriate. In addition, in the UK, games with adult content (gross violence, criminal or sexual activity) must be reviewed and rated by the British Board of Film Classification, and bear a BBFC label. Under the Video Recordings Act 1984, games which receive BBFC 18 rating must not be sold to minors.

Two-thirds of Pakistani adults believe that television programmes are regulated. Although a minority say that television programmes are not regulated, this belief is more evident among over-44s and those in C2DE socio-economic groups.

Figure 101: Whether believe television programmes are regulated



T12 – As far as you know, are TV programmes regulated?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 153 Pakistani male, 147 Pakistani female) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

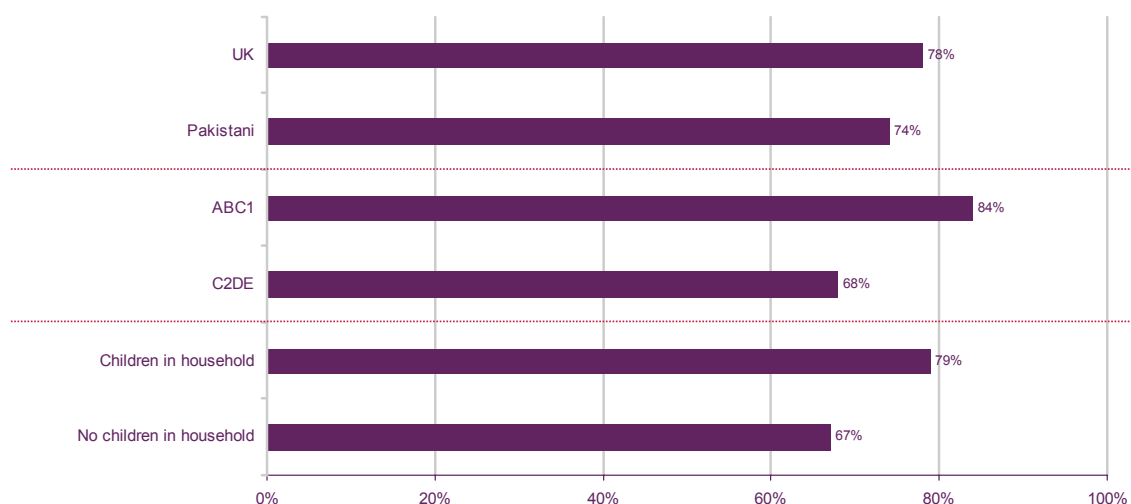
Compared to UK adults overall, fewer Pakistanis believe that television programmes are regulated (66%) and more believe they are not regulated. This difference is not related to the younger profile of the Pakistani population, as Pakistani adults under 45 (73%) are as likely as similarly aged UK adults overall (77%) to believe that television programmes are regulated.

One element of television regulation is the watershed - the requirement that any content which contains material that is unsuitable for children should not, in general, be shown before 21:00 or after 05:30.

Three in four Pakistani adults say there is a television watershed which starts from 9pm, and awareness of the watershed is higher among adults in the ABC1 socio-economic groups and those with children in the household.

Awareness of the watershed is at the same level as UK adults overall.

Figure 102: Whether aware of 9pm television watershed

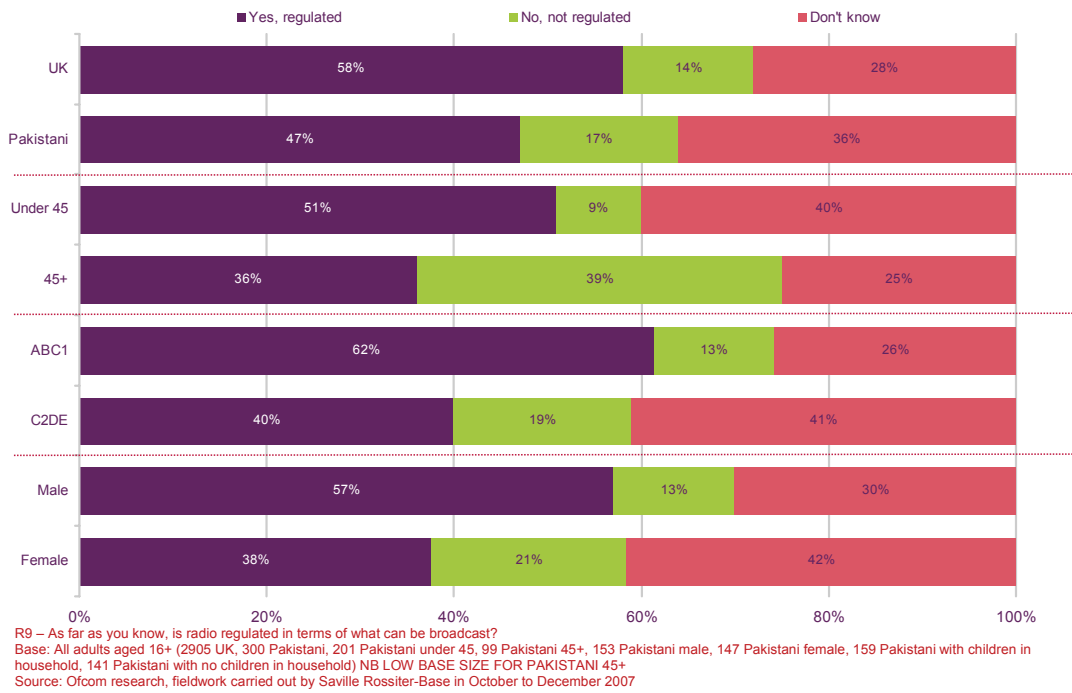


T14 – Is there a time of day after which programmes that are considered unsuitable for children can be shown? What time is this?
Base: All adults aged 16+ (2905 UK, 300 Pakistani, 164 Pakistani ABC1, 135 Pakistani C2DE, 159 Pakistani with children in household, 141 Pakistani with no children in household)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Nearly half of all Pakistani adults believe that radio is regulated in terms of what can be broadcast, with most of the remainder unsure.

The belief that radio is not regulated is more common among adults over 45. Those in the C2DE socio-economic groups and females are more likely to say they don't know.

Figure 103: Whether believe radio broadcasts are regulated



Fewer Pakistani adults believe that radio broadcasts are regulated, compared to UK adults overall, but there is no difference in this regard between Pakistani adults under 45 and under-45 UK adults overall.

Opinion on whether the internet is regulated is split; 39% say the internet is regulated, 30% say it is not regulated, and 31% are unsure.

Both under-45s and males are more likely to believe the internet is regulated; both these groups are more likely to be internet users.

Figure 104: Whether believe internet content is regulated



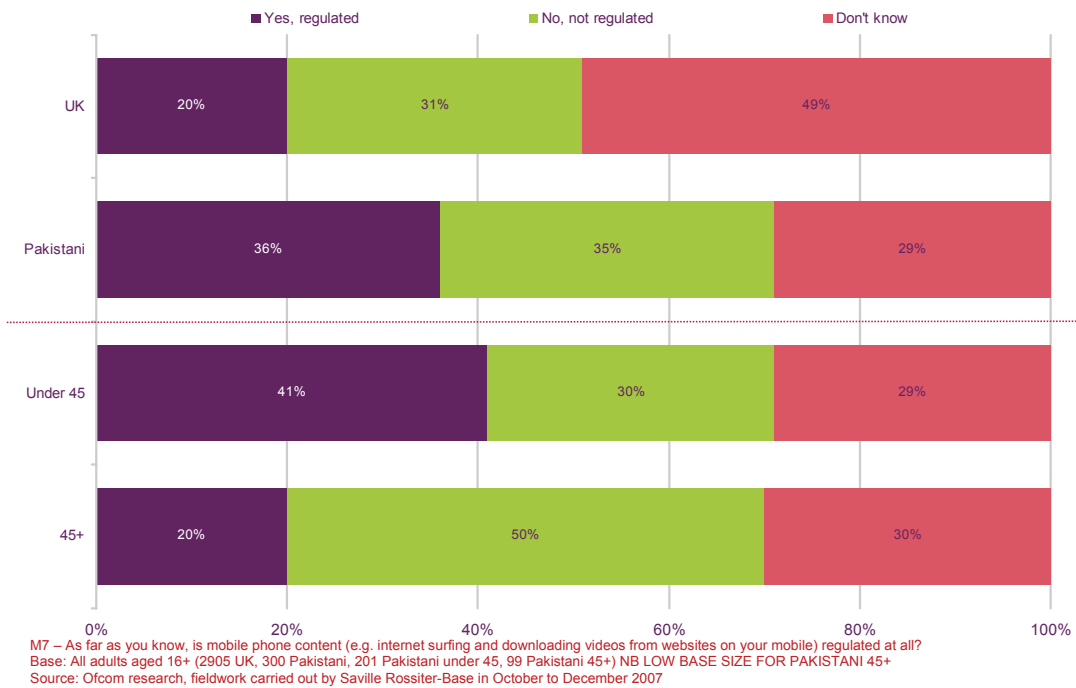
Opinions on internet content regulation are almost a reverse of those expressed by UK adults in general; where 41% are unsure and 26% say it is regulated.

The opinion among Pakistani adults that the internet is regulated appears to be driven by the younger age profile, as under-45 Pakistani adults are more likely than under-45 adults in the UK population to say that internet content is regulated (44% compared with 28%).

When asked whether mobile phone content (such as surfing and downloading videos) is regulated, opinion is split among Pakistani adults; 36% say it is regulated and 35% say it is not, while 29% are unsure.

The belief that mobile content is regulated is more common among adults under 45, who are more likely to be using mobiles, and accessing mobile phone content.

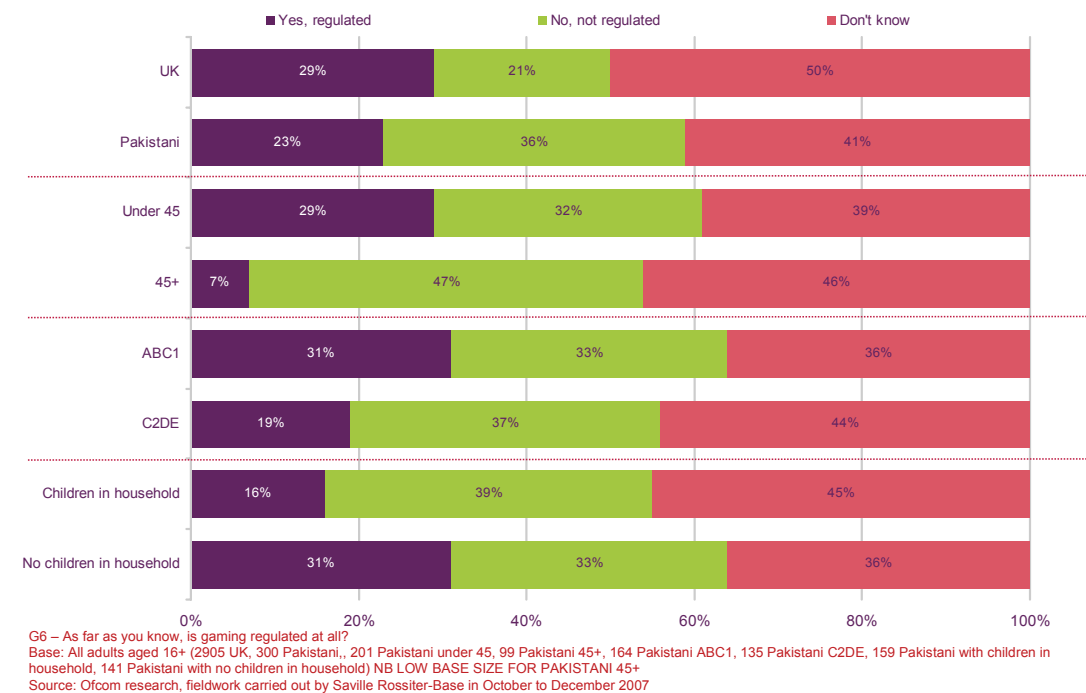
Figure 105: Whether believe mobile phone content is regulated



Pakistani adults are more likely than UK adults overall to say that mobile phone content is regulated, and UK adults in general are more likely to say they don't know.

As with questions about regulation of mobile phone content, there is confusion about whether gaming is regulated. Two in five say they do not know whether gaming is regulated or not and over one in three say it is not regulated.

Figure 106: Whether believe gaming is regulated



Pakistani adults are more likely than UK adults to say that gaming is not regulated (21%). The incidence of gamers is high compared with the UK population (38% compared with 31%). However, the higher incidence of gamers is not the only explanation for greater awareness of its regulatory status; many of those who say gaming is not regulated are over-44s, of whom only 5% are gamers.

Attitudes towards protection from content are stronger than attitudes towards the freedom of expression of content

The majority of Pakistani adults agree (either strongly or slightly) that:

- *television programmes must be free to be expressive and creative; and*
- *television viewers must be protected from seeing inappropriate or offensive content.*

Agreement is stronger that viewers must be protected, with this response more likely to be given by older adults and those with children in the household.

Figure 107: Attitudes towards television content: *must be free to be expressive and creative vs viewers must be protected from offensive or inappropriate content*



T17A-B – TV programmes must be free to be expressive and creative/ TV viewers must be protected from seeing inappropriate or offensive content
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Unlike Pakistani adults, within the general UK population broadly equal numbers of adults agree with each of these attitudes. This difference is because Pakistani adults are less likely to agree that television programmes must be free to be expressive and creative.

Attitudes towards protection from content are also stronger for the internet

The majority of Pakistani adults who use the internet agree (either strongly or slightly) that:

- *internet sites must be free to be expressive and creative; and*
- *internet users must be protected from seeing inappropriate or offensive content.*

While some people agree with both statements, agreement is stronger that users must be protected.

Responses do not vary to any significant extent within the Pakistani population.

Figure 108: Attitudes towards internet content: *must be free to be expressive and creative vs users must be protected from offensive or inappropriate content*



IN48A-B – Internet sites must be free to be expressive and creative/ Internet users must be protected from seeing inappropriate or offensive content
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK 199 Pakistani)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Both the direction and strength of attitudes towards internet content matches that of the UK population.

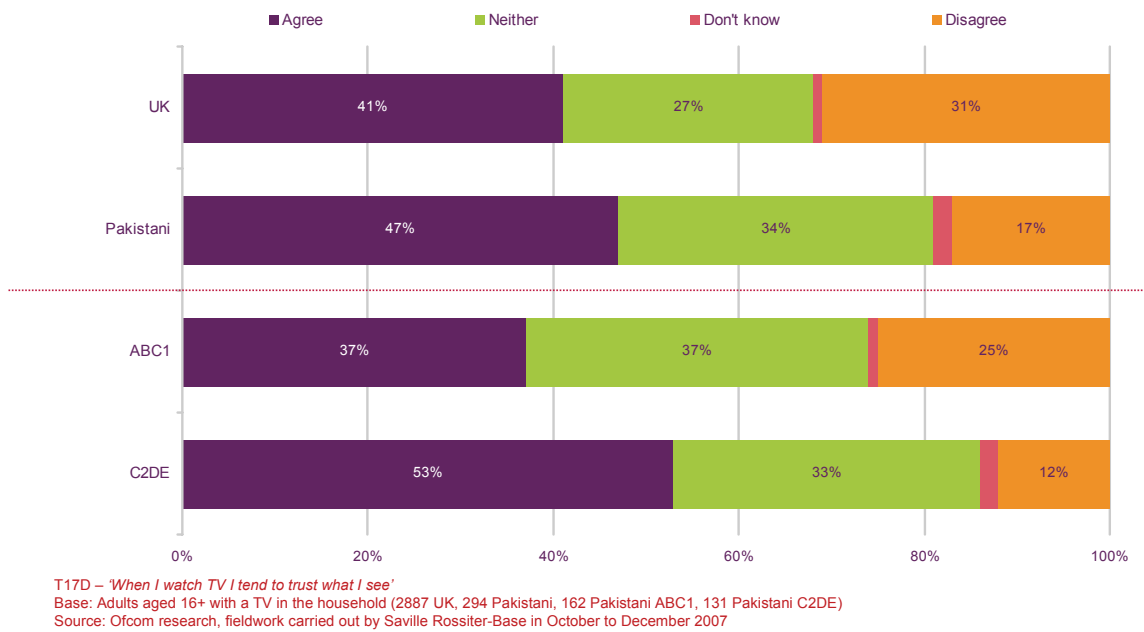
Nearly half say they tend to trust what they see on television

Almost all Pakistani adults have a television in the household (97%) and more agree (47%) than disagree (17%) that they trust what they see on television. Trust in television content is higher among those in the C2DE socio-economic groups (53%).

It should be noted that this question did not distinguish between different genres of television programming or between different television channels, whether UK or foreign-based.

Four in five (82%) Pakistani adults say they watch news or factual programmes. Among these viewers, half (48%) say their level of belief in these programmes varies according to the channel, or that they are sceptical about the information on these programmes. This degree of critical evaluation is more evident among those in the ABC1 socio-economic groups (55%).

Figure 109: Trust in television: *when I watch television I tend to trust what I see*



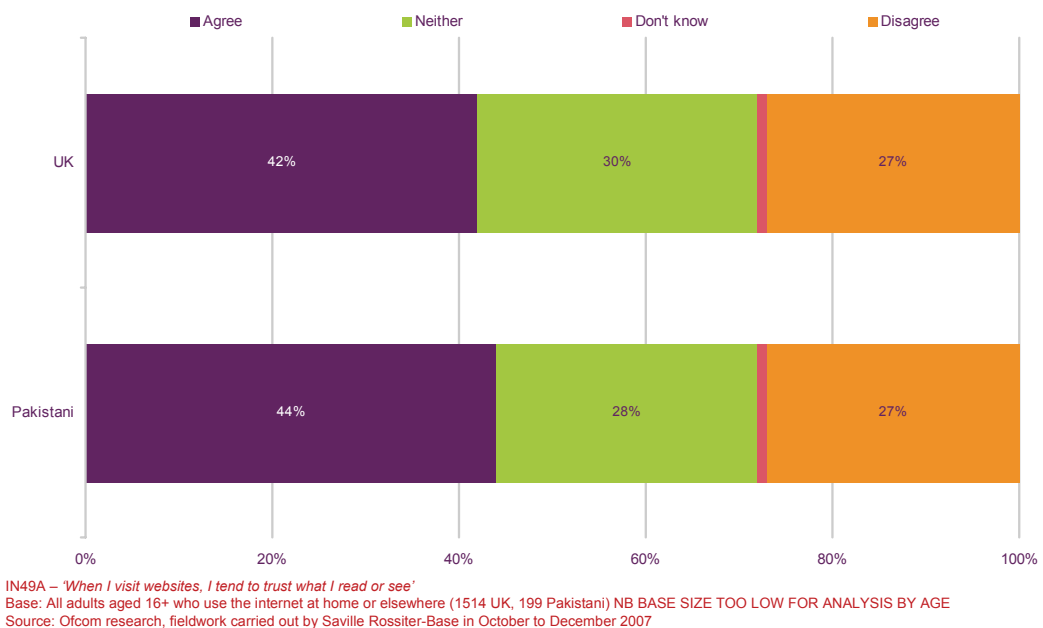
UK adults are more likely to disagree (31%) that they trust what they see on television than Pakistani adults, but again, there is no majority opinion.

While a lower percentage of Pakistani adults watch news or factual programmes compared to the UK average (94%), critical evaluation of these programmes among viewers is at a similar level to the UK measure (51%).

Opinion varies on whether users trust what they see on websites. Two in five say they do tend to trust what they see, while the remainder are split - either disagreeing or neutral.

As with assessing trust in television content, this question does not differentiate by the type of content people are consuming.

Figure 110: Trust in internet: *when I visit websites I tend to trust what I read or see*



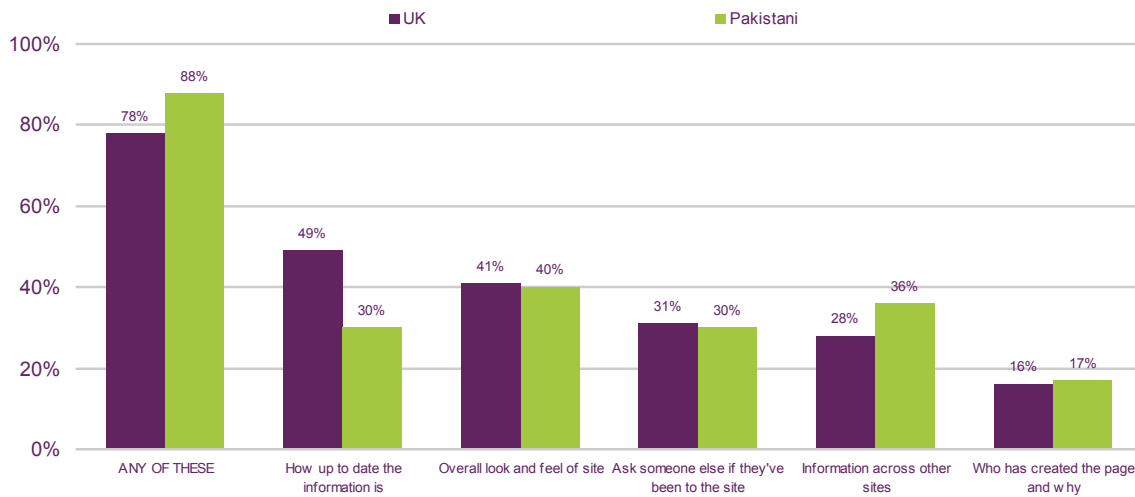
There are no significant differences between the Pakistani and UK populations in terms of trust in online content.

The majority of Pakistani internet users make some sort of check when they use a new website

We asked people whether they check a new website before using it, and whether they make any judgements before entering personal details on a website. Eighty-four per cent of Pakistani internet users say they 'ever use' new websites. Visiting new websites is more common for users under 45 and those in the C2DE socio-economic groups.

Among those that do visit new websites, the majority of users make some sort of check when they use a new site, with no particular type of check standing out as the most commonly made.

Figure 111: Checks made when visiting new websites



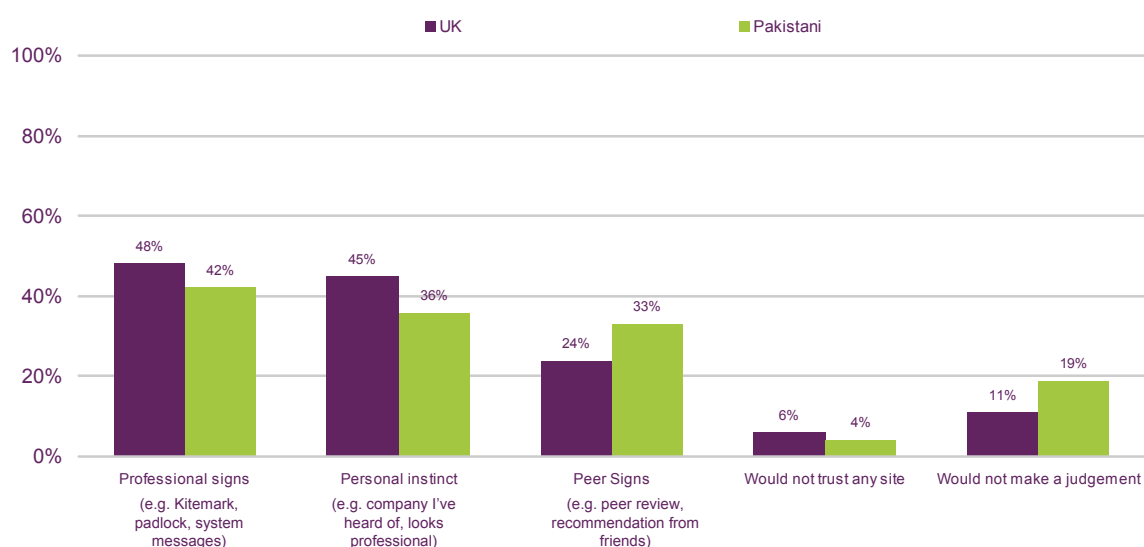
IN16 – Thinking about new websites you visit, which, if any, of these things would you check?
 Base: All adults aged 16+ who use the internet at home or elsewhere who visit new websites (1536 UK, 171 Pakistani)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Pakistani adults are more likely to mention making any check, compared to UK users overall, and the type of checks made differs between the two groups. Pakistani internet users are more likely to say they check information across other sites while UK internet users overall are more likely say they check how up to date the information is.

Pakistani internet users are more likely to use peer signs to judge whether they should enter their personal details, than UK users in general

The majority of Pakistani adults (81%) would make a judgement about a website before entering personal details, most usually professional signs such as the padlock symbol.

Figure 112: Judgements made about a website before entering personal details



IN42 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) (Spontaneous responses)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1514 UK, 199 Pakistani)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Making a judgement is less common than for all UK internet users (at 89%). It may be that this reflects a lower use of websites that would require personal details, given that Pakistani adults are less likely to purchase online and have more concerns about entering debit card details.

Use of peer signs (peer reviews or recommendations) is more common among Pakistani internet users.

The majority have concerns about television and internet content, and mobile phones

The majority (73%) of Pakistani adults have concerns about what is on television. Unprompted responses regarding these concerns have been grouped into the following three themes:

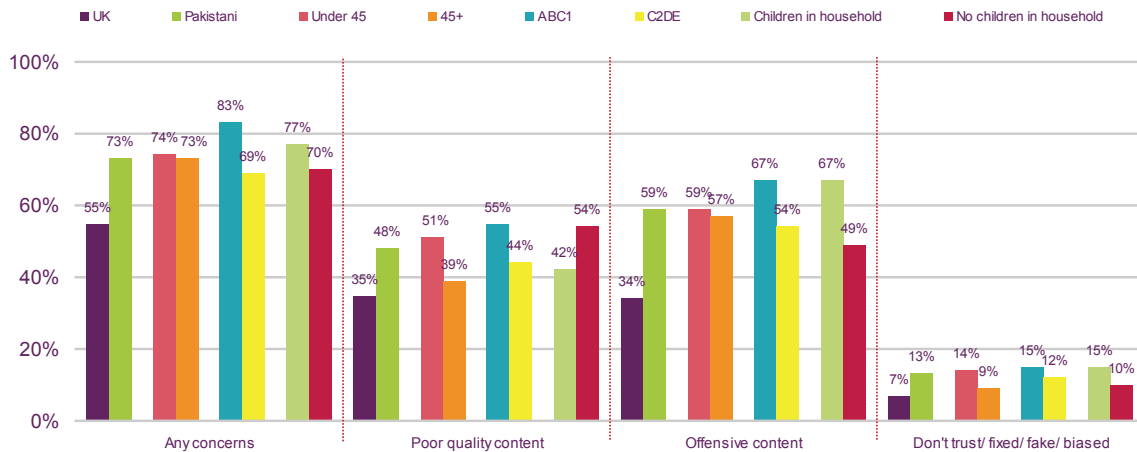
- poor quality content - responses such as *too many repeats, too many reality television programmes, poor quality programmes and too many advertising breaks;*
- offensive content - responses such as *violence, bad language, sex/ nakedness and people behaving badly;* and
- don't trust/ fixed/ faked/ biased - responses such as *phone-in competitions that are fixed/ faked.*

Offensive content is the biggest concern

Concerns most commonly relate to offensive content. The three most common unprompted concerns are sex/ nakedness, violence, and poor quality programmes.

Concerns about television generally are more likely to be mentioned by adults in the ABC1 socio-economic groups.

Figure 113: Concerns about what is on television



T10 – Can you tell me if you have any concerns about what is on TV? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

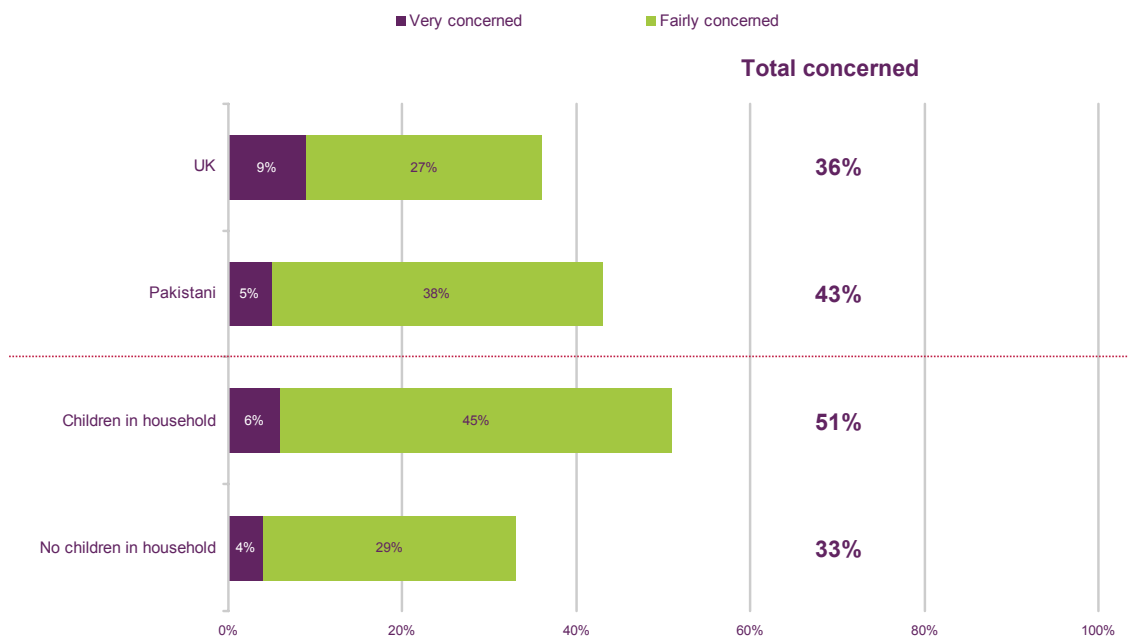
Concerns about what is on television, and each type of the three types of concern, are more common than among UK adults overall.

As detailed previously, Pakistani adults are less likely to believe that television programmes are regulated, which may influence their level of concern about television.

When asked to what extent they are concerned about what is on television, around two in five Pakistani adults say they are either very, or fairly, concerned.

The extent of concern about what is on television is higher among those with children in the household.

Figure 114: Extent of concern about what is on television



T11 – Overall, how concerned are you about what is on TV?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 159 Pakistani with children in household, 141 Pakistani with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

This overall extent of concern is higher than among UK adults, because a higher proportion of Pakistani adults are 'fairly concerned' about what is on television.

Pakistani adults are significantly more likely to be concerned about what is on the radio than all UK adults

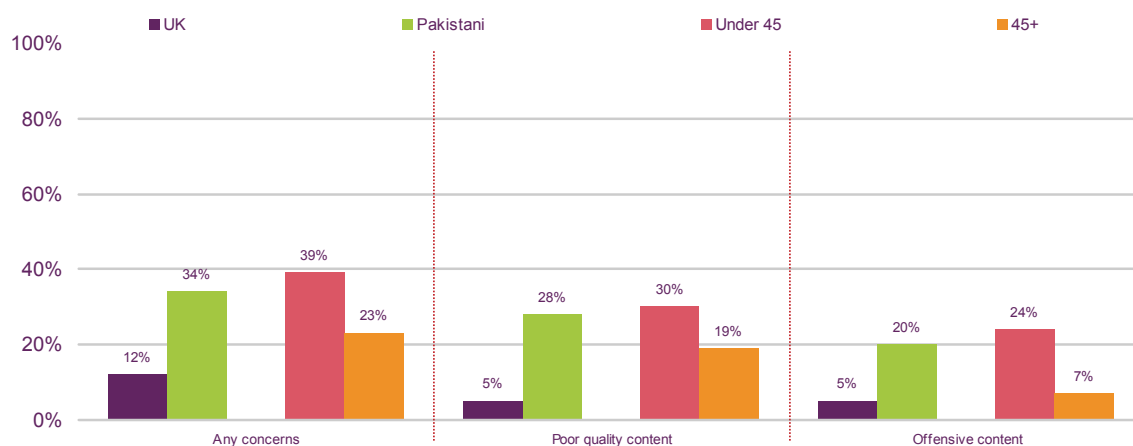
One in three (34%) Pakistani adults have any concerns about what is on the radio. Unprompted responses regarding these concerns have been grouped into two themes:

- poor quality content - responses such as *too many advertising breaks, lack of originality/ programmes are similar, and poor quality programmes*; and
- offensive content - responses such as *bad language, bad taste/ shock tactics and drug references*

Concerns are most likely to relate to poor quality content, followed by offensive content. The two most common unprompted concerns about what is on radio are: too many advertising breaks and poor quality programmes.

Concerns about radio generally are more likely to be mentioned by Pakistani adults aged under 45, with this group more likely to listen to radio at home.

Figure 115: Concerns about what is on the radio

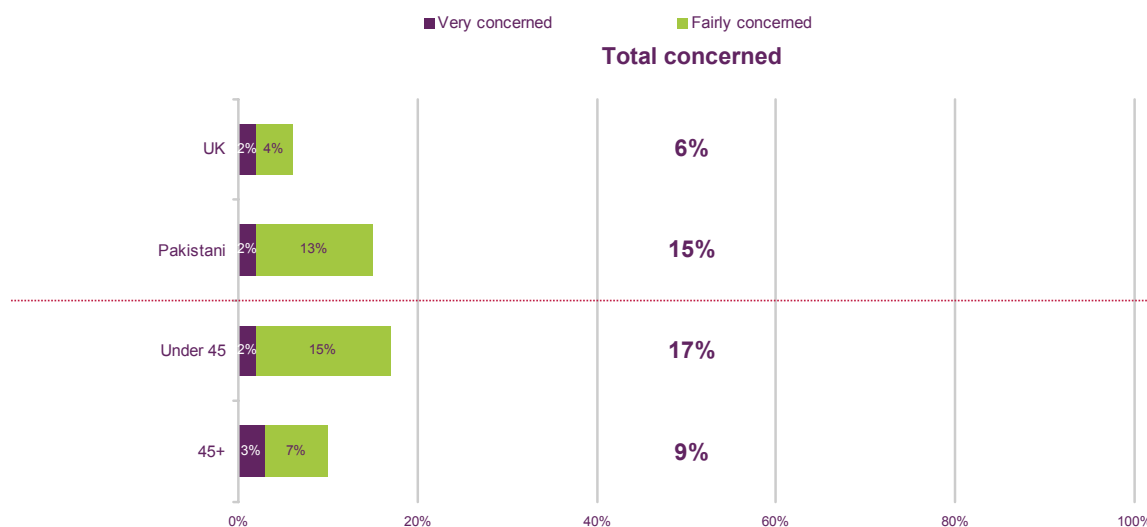


R7 – Can you tell me if you have any concerns about what is on radio? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Concerns about what is on the radio, and both types of concern, are much more common than among UK adults overall. As detailed previously, Pakistani adults are less likely to believe that radio programmes are regulated, and this may be influencing their responses.

When asked to what extent they are concerned about what is on the radio, 15% of Pakistani adults say they are either very, or fairly, concerned. Concern is higher among under-45s, with this group more likely to listen to radio at home.

Figure 116: Extent of concern about what is on the radio



R8 – Overall, how concerned are you about what is on radio?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani aged 45+) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While this is a minority view, the extent of concern about what is on the radio is much higher than among UK adults overall.

Pakistani adults are also concerned about internet content, particularly offensive content

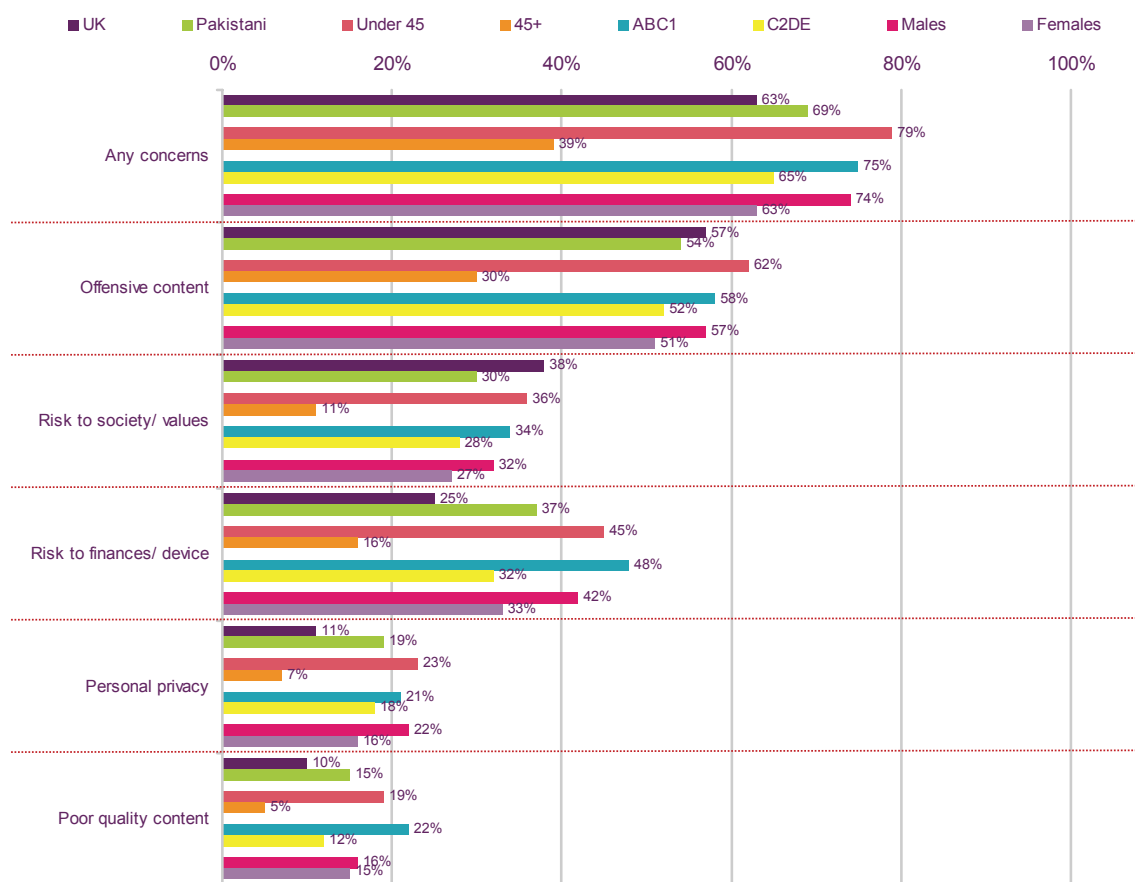
The majority (69%) of Pakistani adults have concerns about what is on the internet. Unprompted responses regarding these concerns have been grouped into the following five themes:

- offensive content - responses such as *sexual content/ pornography, unsuitable for children and violent content*;
- risk to society/ values - responses such as *paedophiles/ perverts masquerading as young people online, websites showing abuse of children, websites instructing how to be a terrorist and websites instructing how to commit suicide*;
- risk to finances/ devices - responses such as *identity fraud/ others getting access to my personal detail, computer viruses/ bugs and insecure sites*;
- personal privacy - responses such as *spam/ unwanted emails and claims for money/ phishing emails*; and
- poor quality content - responses such as *pop-up adverts*.

These concerns relate mainly to offensive content. The five most common unprompted concerns are sexual content/ pornography, paedophiles and online computer viruses.

Concerns about what is on the internet are more likely to be mentioned by under-45s, ABC1s and males; use of the internet is higher among these groups.

Figure 117: Concerns about what is on the internet



IN36 – Can you tell me if you have any concerns about what is on the internet? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 153 Pakistani male, 147 Pakistani female, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

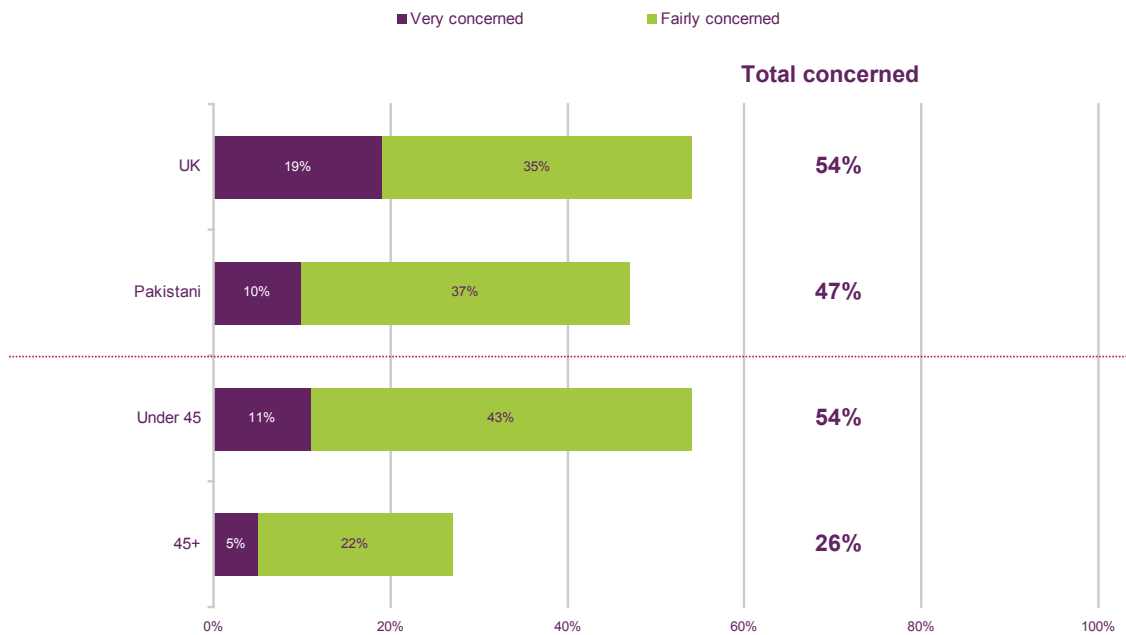
The percentage of people with a concern about what is on the internet is slightly higher among Pakistani adults than all UK adults. However, Pakistani adults are more likely than UK adults to mention concerns relating to risk to finances/ devices, risk to personal privacy and poor quality content.

The higher level of concern about risks to finances and devices is reinforced by the fact that Pakistanis are more likely to mention concerns relating to computer viruses; spontaneous concerns on this subject are much higher among Pakistani adults.

When asked to what extent they are generally concerned about what is on the internet, just under half of Pakistani adults say they are either very, or fairly, concerned.

The extent of concern about what is on the internet is higher among under-45s, where take-up of the internet is higher.

Figure 118: Extent of concern about what is on the internet



IN37 – Overall, how concerned are you about what is on the internet?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+.) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The extent of concern is slightly lower than among all UK adults, in particular the extent to which Pakistani adults are ‘very concerned’ about what is on the internet. As such, while Pakistani adults are more likely than the UK adult population as a whole to nominate concerns about what is on the internet, their extent of concern is actually lower than among the UK adults.

This profile - with younger adults being more concerned - differs from that found in the UK population, where concerns are higher among the over-44s.

Concerns about mobile phones are mainly about affordability

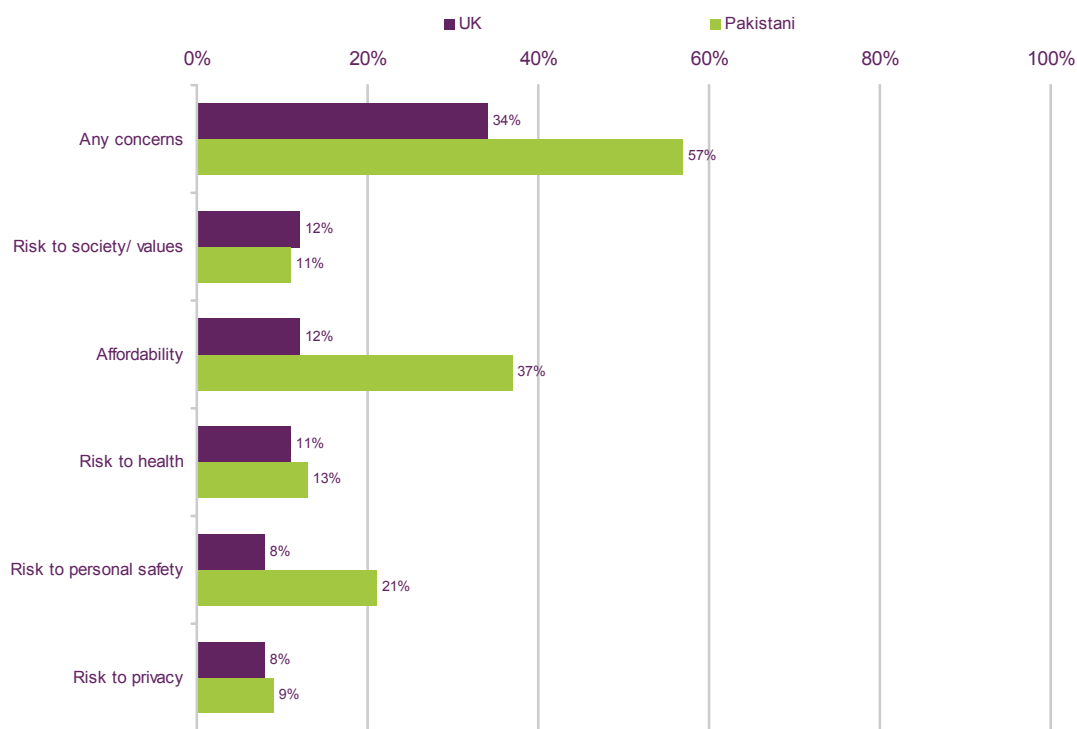
The majority (57%) of Pakistani adults have concerns about mobile phones. Unprompted responses in this area have been grouped into five themes:

- risk to society/ values - responses such as *misuse of camera phones, happy slapping, children having phones at a young age and paedophiles contacting children;*
- affordability - responses such as *cost of calls generally and cost of calls when abroad;*
- risk to health - responses such as *health concerns using handset and health concerns - masts;*
- risk to personal safety - responses such as *target for theft of mobile phone;* and
- risk to privacy - responses such as *intrusion into other people’s space/ public space and junk/ spam text messages.*

Concerns are dominated by affordability, followed by risks to personal safety. The four most common unprompted concerns about mobile phones are the cost of calls (generally), being a target for theft of the phone, the cost of new handsets and the cost of calls when abroad.

Concerns about mobile phones generally do not vary to any significant extent within the Pakistani population, although females are more likely to be concerned than males.

Figure 119: Concerns about mobile phones



M5 – Can you tell me if you have any concerns about mobile phones?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Concerns about mobile phones, and concerns relating to affordability and risks to personal safety, are much more common than among UK adults.

There is no detail on how much adults use their mobile phones in this survey, but the higher take-up, higher interest in interactive functions and the younger profile of the Pakistani population generally suggest a higher volume of use, compared to the UK population.

When asked to what extent they are concerned about mobile phones, just over a quarter (28%) of Pakistani adults say they are either very, or fairly, concerned, with a higher degree of concern among those with no children in the household, who tend to be younger.

Figure 120: Extent of concern about mobile phones



M6 – Overall, how concerned are you about mobile phones?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 159 Pakistani with children in household, 141 Pakistani with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Although this is a minority view, the extent of concern is higher than among UK adults (23%).

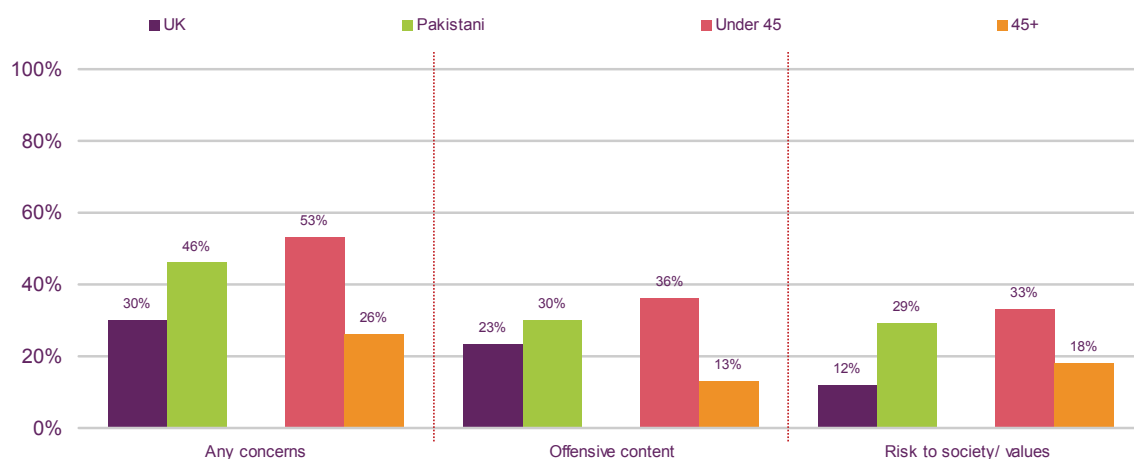
Close to half (46%) of all Pakistani adults have any concerns about gaming. Unprompted responses regarding concerns in this area have been grouped into two themes:

- offensive content - responses such as *violent content, bad language and sexual content*; and
- risk to society/ values - responses such as *unsuitable for children, encourage children to stay indoors and impact on social skills*.

Concerns are broadly equally divided between these two themes. The four most common unprompted concerns about gaming are: violent content, health issues, contribution to obesity and impact on social skills.

Concerns about gaming are more likely to be mentioned by adults aged under 45, with this group much more likely to play games.

Figure 121: Concerns about gaming



G4 – Can you tell me if you have any concerns about gaming?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

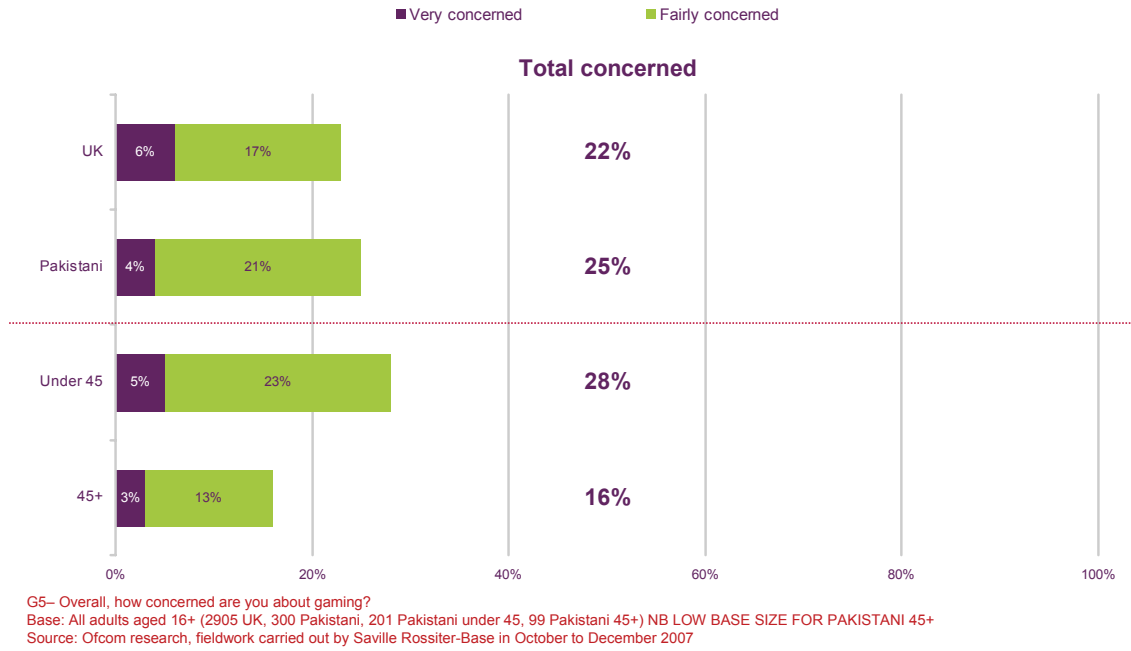
Concerns about gaming, and concerns relating to each of the themes, are more common than among all UK adults.

As detailed previously, Pakistani adults are more likely to believe that gaming is not regulated and this may be influencing their responses.

When asked to what extent they are concerned about gaming, one quarter (25%) of Pakistani adults say they are either very, or fairly, concerned.

The extent of concern about gaming is higher among the under-45s, with this group more likely to play games.

Figure 122: Extent of concern about gaming



The extent of concern about gaming is at broadly the same level as UK adults. As such, some of the issues that adults mention as concerns do not, in themselves, cause the individual a great deal of concern.

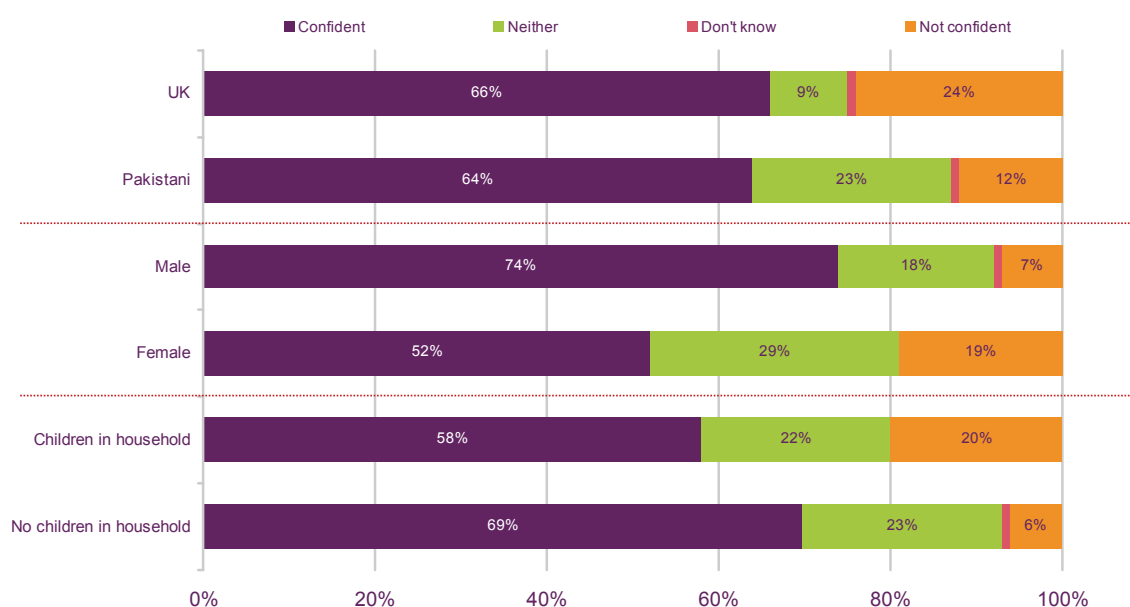
5.4 Create

While most are confident in creating content, only a minority have experience of any particular creative activities

Two in three (64%) Pakistani adults who use the internet say they are confident in using the creative functionality of the internet and mobile phones, such as creating blogs, editing and sharing photos online and uploading videos from a mobile phone.

Confidence is more evident among those who are more likely to use the internet for creative functions: males and those without children in the household.

Figure 123: Confidence in creating content



IN10 – How confident are you in using the creative elements that media such as internet and mobile phones offer? This includes creating blogs (or online diaries), editing photos and sharing them with friends and uploading short videos from a mobile phone
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 199 Pakistani, 114 Pakistani male, 85 Pakistani female, 87 Pakistani with children in household, 112 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI FEMALE, WITH CHILDREN IN HOUSEHOLD. BASE SIZE FOR AGED 45+ TOO LOW FOR ANALYSIS
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

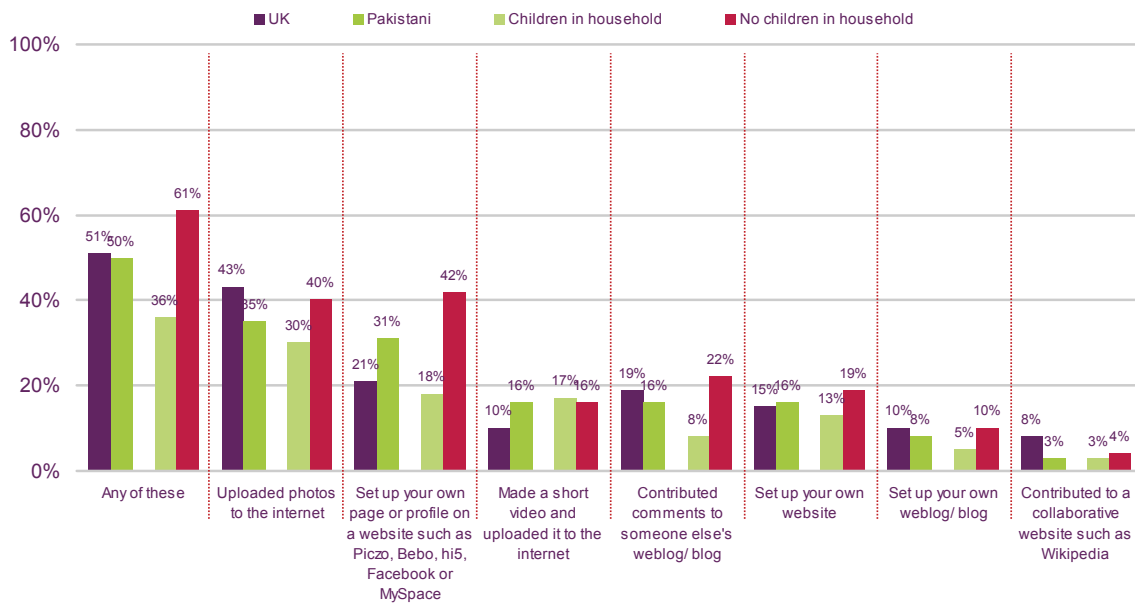
The degree to which Pakistani adults say they are confident does not differ to any significant extent from UK adults overall, which might be expected, given the finding (below) that Pakistani adults are no more or less likely than all UK adults to have experience of the creative aspects of the internet.

Compared to UK adults overall, Pakistani adults are less likely to say they are not confident in using creative elements online, and more likely to give a neutral (neither confident nor not confident) response. This greater degree of neutral response corresponds with the earlier finding relating to confidence in finding content online.

Half (50%) of all Pakistani adults who use the internet have ever used the internet for particular creative functions; most commonly uploading photos to the internet or creating a social networking site profile.

Experience is more common among those without children in the household, with this group tending to be younger.

Figure 124: Experience of creative activities



IN28A-G – I'd like to read out a number of things people might do using the types of technologies we've been talking about. For each one, could you please tell me if you've done it, or you'd be interested in doing it, or you're not interested in doing it?
 Base: All who use the internet at home or elsewhere (1723 UK, 199 Pakistani, 114 Pakistani male, 85 Pakistani female, 87 Pakistani with children in household, 112 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI FEMALE, WITH CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

At the overall level, experience of any of these creative functions does not differ from UK adults overall who use the internet at home or elsewhere.

Three in ten have a social networking site profile

Three in ten (31%) Pakistani adults who use the internet have a social networking site page or profile. Of those who do, broadly equal numbers have a profile on more than one site, with an average of 1.7 profiles per user.

Using social networking sites is more common among those without children in the household, who tend to be younger.

Having a social networking site profile is more common than among the UK population overall who use the internet (20%).

The base size for social networking site users among Pakistani adults is low, and so further details on users are indicative only. It appears that Pakistani social networking site users are more likely than UK users to:

- have a profile on Facebook or hi5;
- use social networking sites more frequently; and
- use the sites to talk to people they don't know.

5.5 Learning

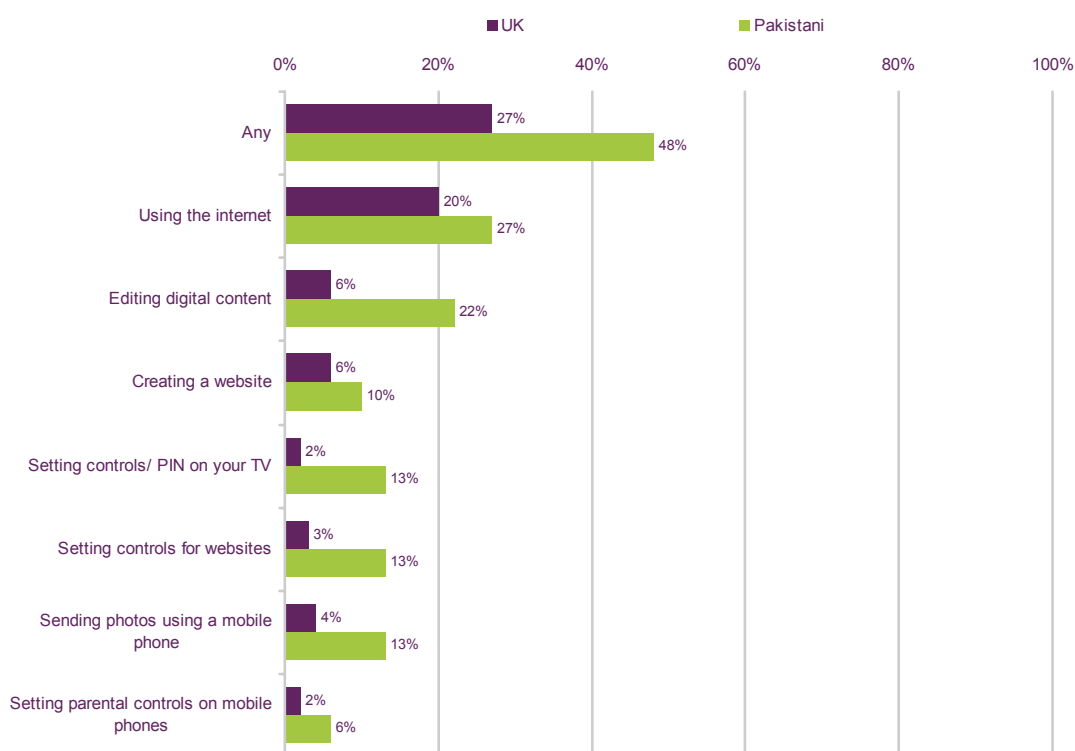
Half have experience of formal teaching of digital technology

Around half (48%) of all Pakistani adults have experience of formal teaching of digital technology, through classes or another type of training.

This teaching is most commonly about using the internet, but a significant minority also have had experience of teaching about editing digital content.

As might be expected, experience of learning about digital technologies is higher among adults under 45 (56%, compared with 24% of those aged 45 and over).

Figure 125: Experience of teaching about digital technology



Z9 – Thinking about the types of things you might learn about TV, the internet, mobile phones and so on... Can you tell me which, if any, of these have you learned more about through classes or any other type of training?

Base: All adults aged 16+ (2905 UK, 300 Pakistani) Shows responses from 5% or more of all Pakistani adults

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

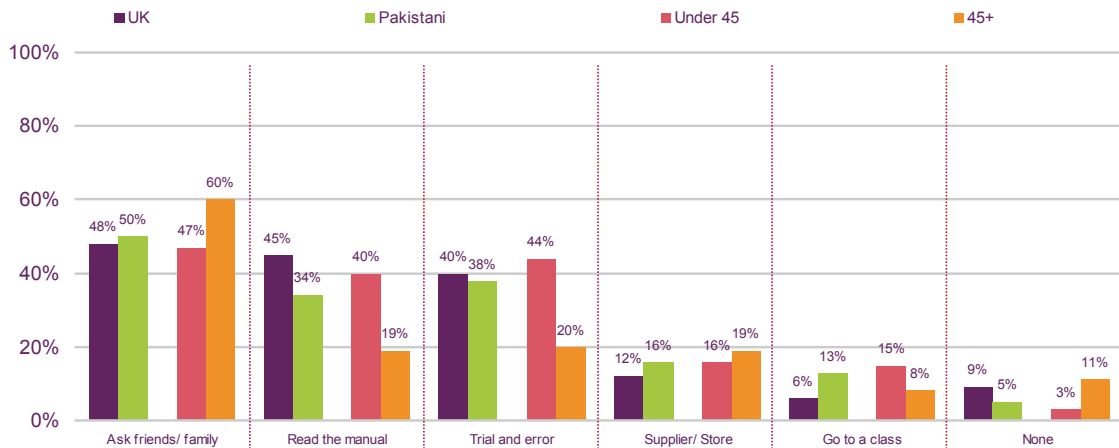
Experience of formal teaching of digital technology is more common than in the UK population overall (27%). Additionally, this exposure to learning is also higher Pakistani adults under 45 (56%) than it is among UK adults in the same age group (34%).

Most have a preference for informal learning

The most preferred options for learning about digital technology are through friends and family, by reading the manual or instructions, and through trial and error.

There are some clear differences by age and gender; with over-44s and females more likely to prefer to learn through friends and family, while adults under 45 and males are more likely to prefer to read the manual, or to learn through trial and error.

Figure 126: Preference for learning about digital technology



Z8 – We have discussed digital television and radio, the internet and mobile phones. Please tell me which of these are ways you prefer to learn about using such services?
 Base: All adults aged 16+ (2905 UK, 300 Pakistani, 201 Pakistani under 45, 99 Pakistani 45+, 164 Pakistani ABC1, 135 Pakistani C2DE, 153 Pakistani male, 147 Pakistani female, 159 Pakistani with children in household, 141 Pakistani with no children in household) NB LOW BASE SIZE FOR PAKISTANI 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

At the overall level, compared to the whole UK population, Pakistani adults are less likely to prefer to read the manual or instructions, and more likely to prefer to learn through going to a class.

Section 6

Black Caribbean adults

6.1 Summary

The demographic profile of the Black Caribbean population differs from the UK average and from the other EMGs in this report across a number of variables:

- the Black Caribbean community has a younger profile than the UK as a whole; 62% of Black Caribbean adults are aged between 16 and 44 years, compared with 52% for the UK. They are, however, older in profile than the other EMGs in this report, reflecting their longer migration history.
- Black Caribbean adults (along with Pakistani adults) are less likely to live in an ABC1 household than Indian and Black African adults, and than the UK population as a whole (35% compared to 55% across the UK). They have a higher than average proportion of people living in C2DE households.
- Two-thirds of Black Caribbean adults are in either in full-time or part-time employment, a figure that is higher than the Pakistani community but lower than Black Africans and Indians.
- Household size is similar to the UK population as a whole (3.2 compared to 3.0) but there are more children in each household on average (2.4 compared to 1.0).

Access

Key elements of the access metric are take-up of digital devices at home.

Table 7: Key access measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
**Multiple platform ownership	62%	65%	55%	62%	53%
Digital TV ownership	83%	89%	81%	82%	82%
Mobile phone take-up	90%	91%	88%	95%	85%
Internet take-up	76%	72%	64%	69%	62%
*Willingness to get internet	25%	35%	30%	30%	15%

** Home ownership of digital television, internet and mobile phone

* Base: All adults who do not have the internet at home

Just over half of Black Caribbean adults live in a household with multiple media devices (defined as being digital television *and* the internet *and* a mobile phone). This is the lowest penetration of all of the EMGs, and is most similar to the UK average. Black Caribbean adults who are more likely to have *all* these media devices in the home tend to be under 45, ABC1, and have no children.

Digital television ownership is at a similar level to the UK population as a whole, but Black Caribbean adults are more likely to have a satellite subscription than the UK population as a whole (55% compared with 43% of all UK adults), who are more likely to have Freeview. This is perhaps not surprising, because satellite (and cable) services offer an array of specialist and international channels, including foreign news¹⁹.

The vast majority of Black Caribbean adults personally use a mobile phone, and mobile phone use is more common among adults aged under 45, those in ABC1 socio-economic groups, and males. However, personal ownership of mobile phones does not differ from the average UK figure, unlike Indian, Pakistani and Black African adults, who have higher than average ownership.

Black Caribbean adults are less likely to live in a household that has the internet (64%) compared to other EMGs, but are at a similar level to the general UK population (62%). Thirty per cent of internet non-owners say they intend to get internet access at home in the next 12 months.

Black Caribbean adults regularly take part in a variety of media activities. The top three activities cited are: watching television, listening to the radio and using a mobile phone. Overall, the range of media activities conducted by Black Caribbeans is lower than the UK average. With the exception of listening to the radio, playing console or computer games and listening to an MP3 player, Black Caribbeans participate in fewer other media-related activities.

Watching television is important, and 45% of Black Caribbeans say it is the media device they would miss the most. However, compared to the UK average, a higher proportion say that they would miss their mobile phone most. The proportion of under-45s who say they would miss their mobile the most is the highest of all the EMG groups.

Despite the fact that household take-up of the internet and the number of hours spent online are comparable with the UK average, there are differences in the locations where the internet is used. Black Caribbeans are more likely to use the internet both at home and at work, while the general UK population is more likely to access the internet at home only, or not use it at all.

Black Caribbean adults also use the internet for a narrower range of activities. The online activities they are more likely to do include listening to or downloading music, watching or downloading short video clips and watching or downloading longer videos.

Four in five Black Caribbeans use another media device while watching television, and nine in ten use another device when using the internet. The incidence of using more than one media device at the same time is higher among Black Caribbeans than among the UK adult population.

¹⁹ See Ofcom research report *New News, Future News* published 26 June 2007
<http://www.ofcom.org.uk/research/tv/reports/newnews/>

Understand

Interest in the various digital functions available on digital television and mobile phones is higher among Black Caribbeans than among the UK adult population. With a couple of exceptions (outlined later in this report) interest in internet functions is comparable to levels in the UK population overall. A higher percentage are interested, but lack confidence, in many of the functions we assessed.

The table below summarises the percentage of owners or users who expressed interest in any one of a number of functions on each platform. The second half of the table summarises the proportion of adults who say they have concerns about the media covered in this report.

Table 8: Key understand measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
Interest in...					
digital TV functions	77%	79%	85%	91%	67%
digital radio functions	68%	72%	77%	78%	61%
internet functions	100%	98%	98%	100%	97%
mobile functions	98%	95%	98%	97%	94%
Concerns					
TV	65%	73%	73%	60%	55%
Radio	35%	34%	42%	32%	12%
Internet	65%	69%	64%	65%	63%
Mobile	57%	57%	57%	48%	34%
Gaming	37%	46%	41%	38%	30%

Three-quarters of Black Caribbean adults are confident that they can find the information they need online. However, this proportion is lower than the nine in ten who are confident across the UK adult population overall.

A higher proportion are aware how BBC television programmes are funded than how commercial television, radio or online content is funded.

While Black Caribbean adults are as likely as UK adults in general to know that television programmes are regulated, they are less likely to know the time that the watershed starts.

They are also more likely to believe that the internet, mobile phone content and gaming are regulated.

Black Caribbean adults are more likely to mention that they are concerned about what is on television and radio, as well as being more concerned about mobile phones and gaming in general. While the overall concerns they mention about the internet are similar to the average for UK adults, Black Caribbean adults are more likely to say they are concerned about risks to their finances and devices, such as computer viruses or bugs.

Concerns about mobile phones are driven by issues of affordability, and the higher proportion with concerns about gaming is influenced by concerns about risks to society and values.

Create

We measured people's participation in creative activities by asking internet users how confident they feel about using creative functions online, and whether they have any experience of, or interest in, creating online content. The creative activities we assessed were: *experience* of downloading different types of programming and audio content and *interest* in activities such as uploading photos, creating a social networking profile, contributing to blogs and creating videos that are later uploaded.

Table 9: Key create measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
Confidence in creating content	62%	64%	59%	62%	66%

Although over half of all Black Caribbean adults say they are confident about creating content, this is lower than the two-thirds of the UK adult population. However, their level of experience in carrying out creative activities is comparable with the average for UK adults overall, and they are more likely to have set up a profile on a social networking site, made a short video and uploaded it onto the internet, or contributed comments to someone else's blog.

Similar to the UK population overall, three in ten have had some experience of learning about media technology. However, fewer say that they have a preferred learning strategy, with one in five saying they do not. Of those who do have a strategy, this tends to be reading a manual, asking friends or family, and trial and error.

6.2 Access

This section looks at take-up of digital television, internet and mobile phones, non-internet owners' intentions to get the internet, use of the internet, the regular media activities of adults and the media activity that they would miss most, the extent to which other media devices are used at the same time as watching television or using the internet, and the main reasons for using media devices.

We make comparisons between Black Caribbean adults, surveyed in the Ofcom Ethnic Minority Groups Media Literacy Audit, and a representative sample of UK adults, surveyed in the Ofcom Adult Media Literacy Audit.

In most figures, data are shown for the total adult UK population and for the adult Black Caribbean population. The demographic breakdown (age, socio-economic group, gender and the presence of children) is for the Black Caribbean adult population.

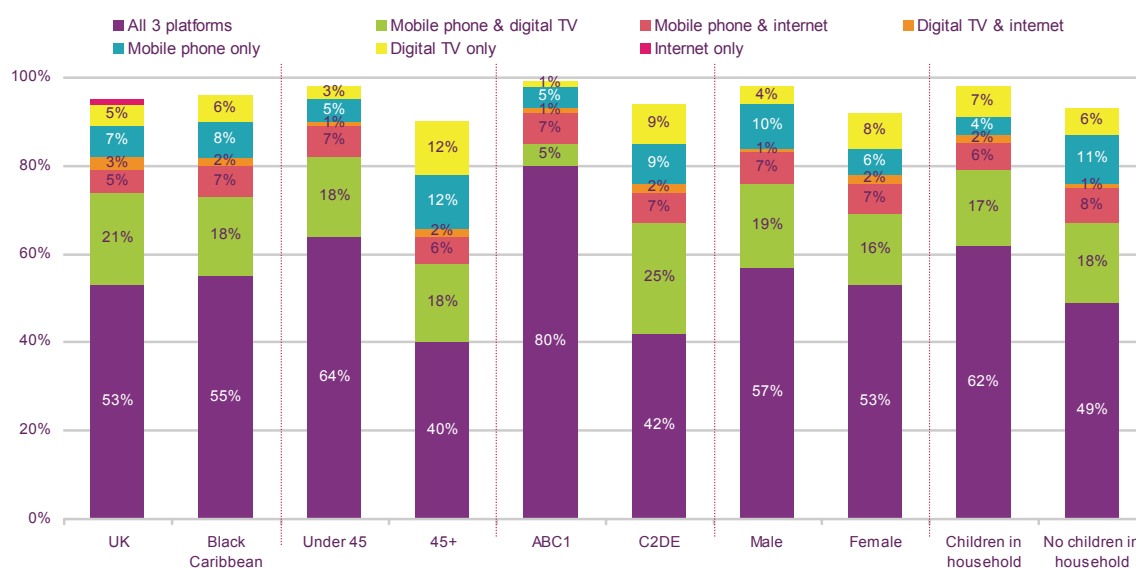
Over half of all Black Caribbean adults live in households with digital television, mobiles phones and the internet – a figure which is similar to the UK average

Figure 127 illustrates the proportion of households that have digital television, the internet and mobile phones.

Four in five (83%) households have more than one digital device in the home (television, internet, mobile phone), and over half (55%) have all three media devices.

Ownership of all three devices is more common among Black Caribbeans aged under 45, in the ABC1 socio-economic groups, and those with children in the household. While ownership of platforms does not vary to any significant extent by gender, Black Caribbean females are more likely than males to say they do not own any of these devices (8% compared with 1%).

Figure 127: Multiple platform ownership of digital television, mobile phone and the internet



T1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?/ Does anyone in your household have access to the internet at home through a computer or laptop?/ Do you personally use a mobile phone?

Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+, 124 Black Caribbean ABC1, 169 Black Caribbean C2DE, 143 Black Caribbean male, 157 Black Caribbean female, 135 Black Caribbean with children in household, 165 Black Caribbean with no children in household)

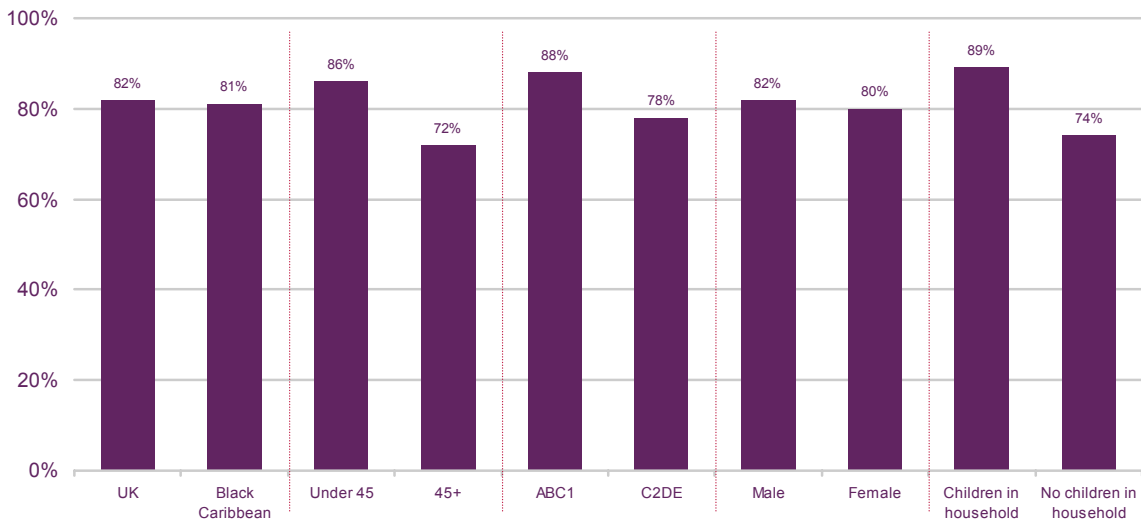
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The percentage of households with multiple media devices does not differ significantly from the UK adult population (82%).

Digital television penetration is similar to the total UK population

Four in five (81%) Black Caribbean adults have digital television at home. Ownership is higher among adults under 45, ABC1s and those with children in the household. Digital television ownership does not vary to any significant extent by gender.

Figure 128: Home ownership of digital television



T1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+, 124 Black Caribbean ABC1, 169 Black Caribbean C2DE, 143 Black Caribbean male, 157 Black Caribbean female, 135 Black Caribbean with children in household, 165 Black Caribbean with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Ownership of digital television, at the overall level and among under-45s, is similar to the UK average.

There are, however, differences in how digital television is received. Over half (55%) of all Black Caribbean adults say they receive their television service through a satellite service, compared with under half (43%) of all UK adults. The higher level of take-up of pay-TV is matched by a lower take-up of Freeview compared to UK adults (14% compared with 30% of all UK adults). Satellite and cable services offer an array of specialist and international channels, including foreign news, which are known to be core drivers of take-up among EMGs²⁰.

Mobile phone ownership is nearing saturation

Nine in ten (88%) Black Caribbean adults personally use a mobile phone.

Mobile phone use is more common among adults under 45, those in ABC1 socio-economic groups and males.

²⁰ See Ofcom research report New News, Future News published 26 June 2007
<http://www.ofcom.org.uk/research/tv/reports/newnews/>

Figure 129: Take-up of mobile phone



M1 – Do you personally use a mobile phone?

Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+, 124 Black Caribbean ABC1, 169 Black Caribbean C2DE, 143 Black Caribbean male, 157 Black Caribbean female, 135 Black Caribbean with children in household, 165 Black Caribbean with no children in household)

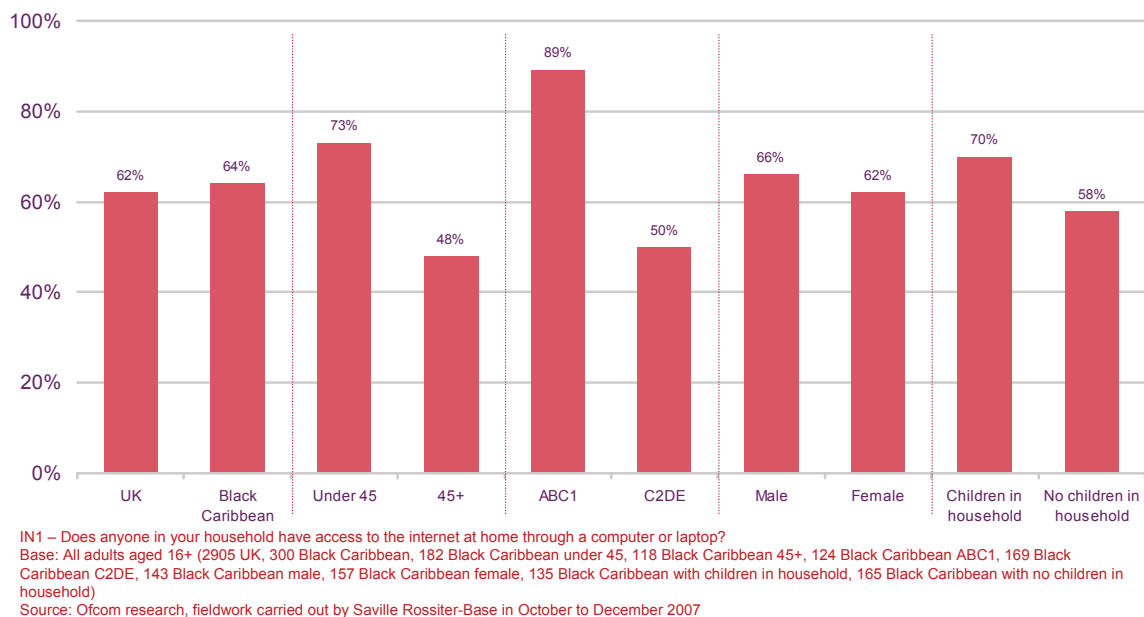
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Personal ownership of a mobile phone does not differ from the UK average. However, the gender differences observed in the Black Caribbean population (with more males than females having mobile phones) do not exist in the UK total population.

Two-thirds live in a household that has the internet – a figure which is similar to the UK average

Two-thirds (64%) of Black Caribbean adults have the internet at home. Ownership is higher among adults aged under 45, those in the ABC1 socio-economic groups and those with children in the household.

Four in five Black Caribbean adults (82%) with the internet at home say they have broadband access, with the remainder split between those who say they have dial-up access (8%) and those who are unsure (9%). Take-up of broadband among internet users appears higher among under-45s. Over-44s are more likely to say they have narrowband.

Figure 130: Home access to the internet

Ownership of the internet at the overall level and among adults under 45 does not differ from the UK average.

Take-up of broadband among Black Caribbean internet users may be lower compared to the UK overall (92%), but this may be due in part to those within the Black Caribbean adult population who are unsure.

There is potential for further increases in internet penetration in Black Caribbean households

Over one-third (36%) of Black Caribbean adults do not have the internet at home, and this is more common among the over-44s (52%); C2DEs (50%); and those without children in the household (42%).

Those who do not currently have access to the internet at home were asked whether they intended to connect to the internet at home in the next 12 months. Three in ten (30%) said they intended to get it in the next 12 months. A similar proportion had not made up their minds and were unsure about their online intentions at home.

Reasons given for not intending to get internet access were largely voluntary (not interested/ no need), with some involuntary (too expensive/ do not know how to use it/ do not have a computer/ too difficult to use).

It is important to note that the base size for those without internet access at home among Black Caribbean adults is relatively low, and so the data in Figure 131 are indicative only.

Figure 131: Intention to get the internet in the home



IN18/ IN20 – Can you tell me if you intend to get internet access at home in the next year or so?/ And can you tell me why that is?
 Base: All adults aged 16+ who do not have internet access at home (1222 UK, 101 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

Three in ten Black Caribbean adults say they intend to get the internet in the next 12 months, compared with 15% of UK adults overall, suggesting that the level of future take-up in the Black Caribbean community will exceed the average in the next 12 months.

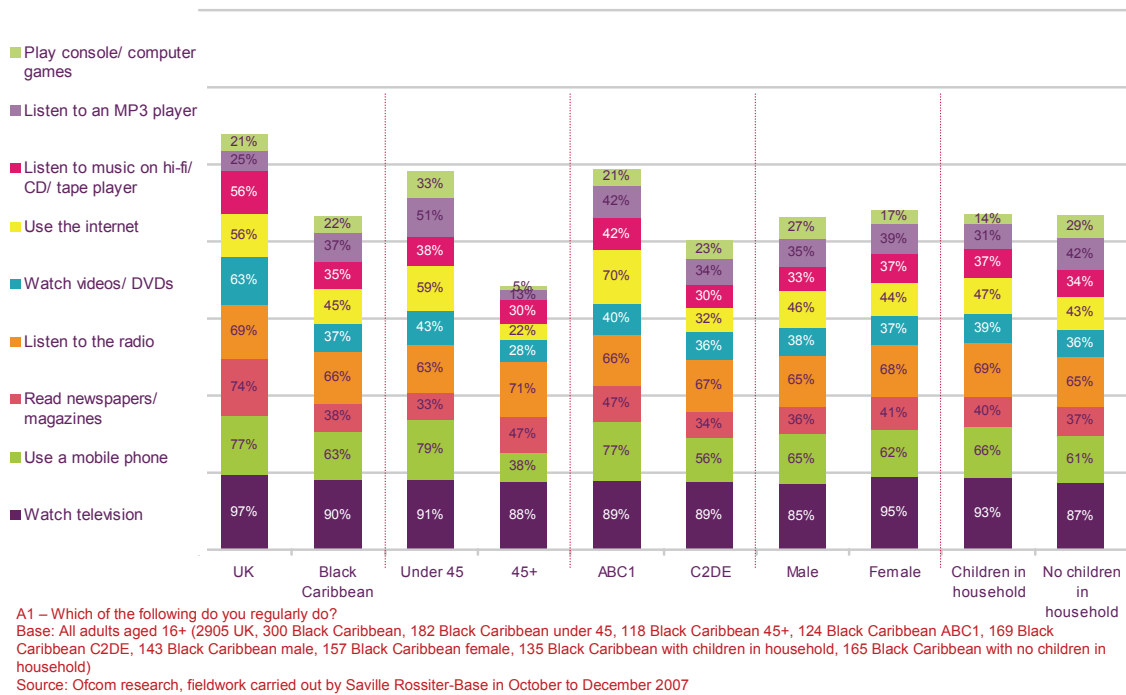
Watching television is the most commonly-mentioned media activity

Figure 132 shows which media activities people do regularly.

Black Caribbean adults regularly participate in a variety of media activities. The top three most mentioned are: watching television, listening to the radio and using a mobile phone.

Black Caribbean adults who are under 45 and those in the ABC1 socio-economic groups have a broader range of regular media activities than the Black Caribbean adult population as a whole. This is mostly due to a higher proportion making regular use of newer media such as mobile phones, the internet and MP3 players. Watching television regularly does not vary to any significant extent by age, but is more common among females and those with children in the household.

Figure 132: Regular media activities

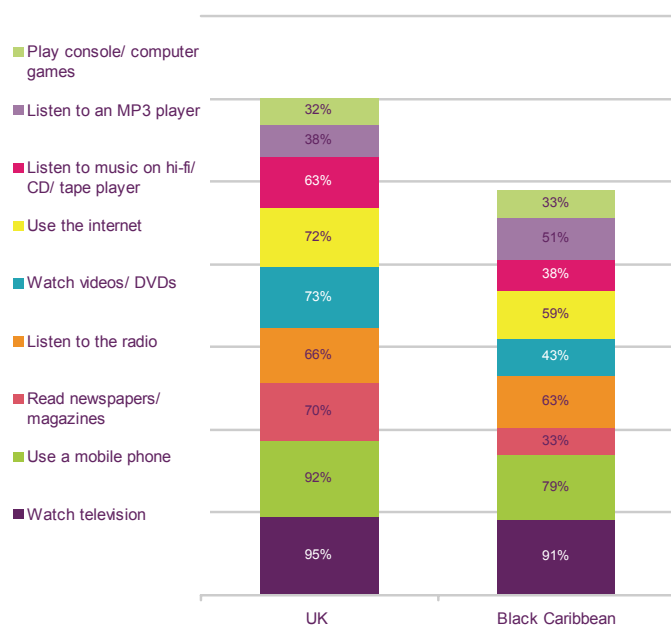


A higher proportion of Black Caribbean adults than all UK adults regularly listen to an MP3 player. In contrast, UK adults overall are more likely to say they regularly use a mobile phone and the internet, as well as the more traditional media: television, newspapers or magazines, videos or DVDs, and listening to music on a hi-fi/ CD or tape player.

When compared to the UK average, Black Caribbean adults appear to be participating in fewer media activities, driven by lower use of the more traditional media. This lower use among Black Caribbeans is not driven by access, as take-up levels across the different platforms are similar to those for the UK overall.

Considering that the Black Caribbean adult population has a younger profile than the UK in general, we might expect greater use of media. However, when we compare Black Caribbean under-45s with the same age group in the whole of the UK, their use of media activities is consistently lower, particularly traditional media such as newspapers and videos/ DVDs (see Figure 133).

Figure 133: Regular media activities among adults under 45



A1 – Which of the following do you regularly do?
 Base: All adults aged 16 to 44 (1547 UK, 182 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

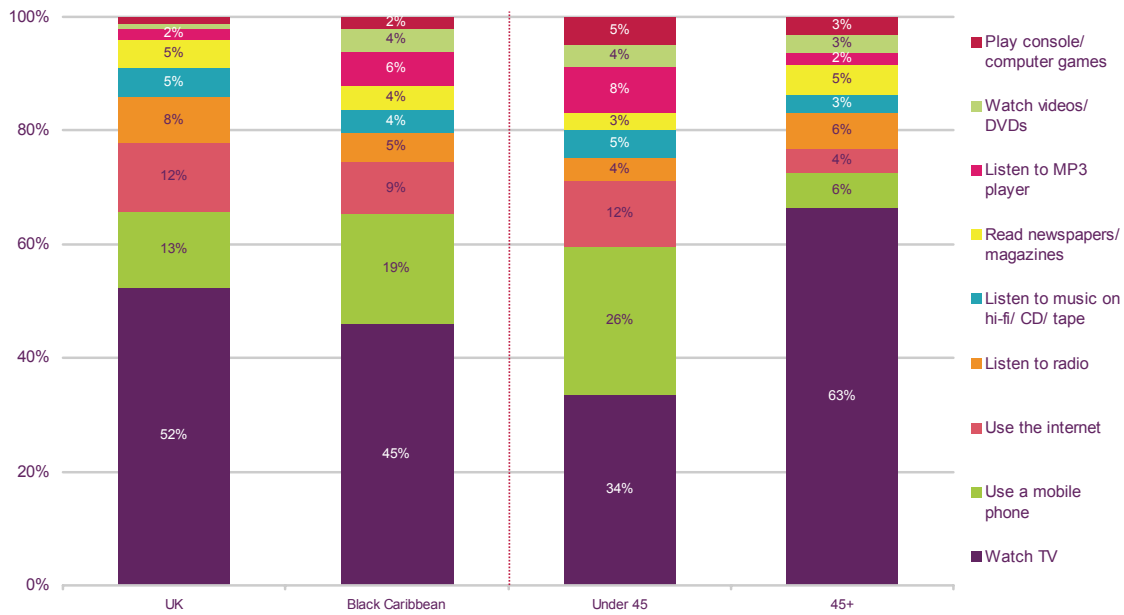
Mobile phones are challenging television as the medium that under-45s would miss the most

Having established which media devices people regularly use, we then asked which one of these they would miss the most, as shown in Figure 134.

Television is the device most frequently mentioned by Black Caribbean adults, with the mobile phone the second most frequently mentioned. The extent to which media other than television are mentioned is reflective of the younger age profile of the Black Caribbean adult population.

Given the age differences in regular media activities, it is not surprising to see differences by age group in the medium people say they would miss the most. Adults under 45 are less likely to say they would miss watching television, and more likely to miss using a mobile phone, the internet or an MP3 player. Adults over 44 are more likely to miss the television.

Figure 134: Most-missed media activity



A2 – Which one of these would you miss doing the most?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Although television is the medium that would be missed the most, the proportion of Black Caribbeans choosing it is lower than the UK average (52%). The proportion that would most miss the mobile phone is higher than for all UK adults (13%).

This difference is due in part to the younger profile of the Black Caribbean adult population; those aged under 45 are less likely to say they would most miss television than are UK adults of a similar age (44%), and they are more likely to say they would miss using an MP3 player the most (3%).

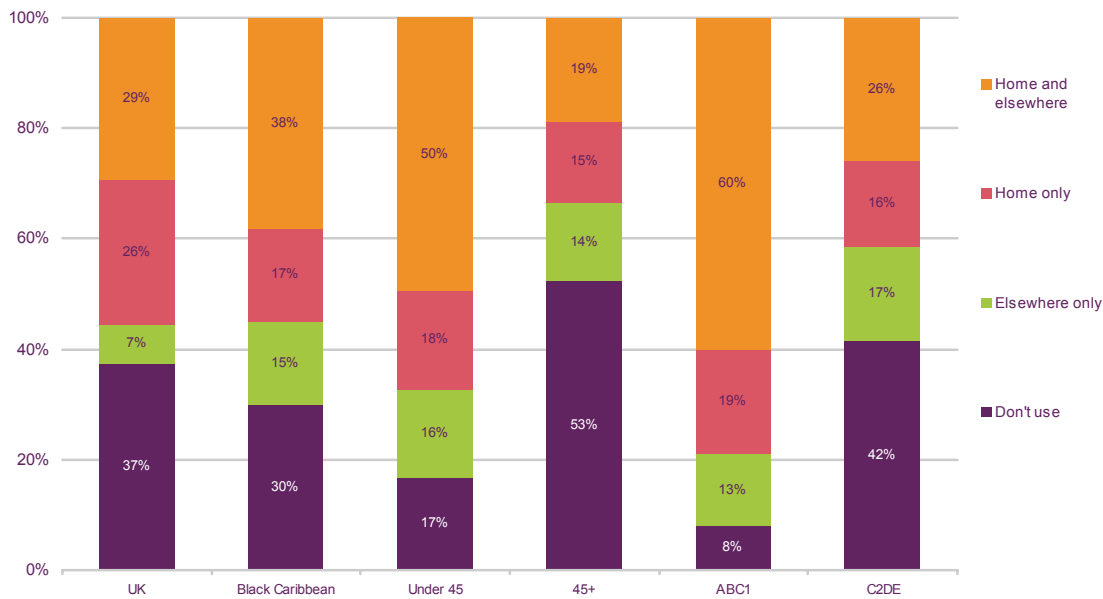
Whereas females in the UK adult population are more likely to say they would miss television the most, this gender difference is not evident in the Black Caribbean adult population.

Black Caribbeans are more likely to use the internet at home *and* elsewhere than at home only

Seven in ten (70%) Black Caribbean adults use the internet, with around three in five (55%) of these using the internet at home and a similar proportion (53%) using it elsewhere. The majority of use outside the home is in the workplace.

Use of the internet is more common for Black Caribbean adults aged under 45 and those in ABC1 socio-economic groups.

Figure 135: Where the internet is used



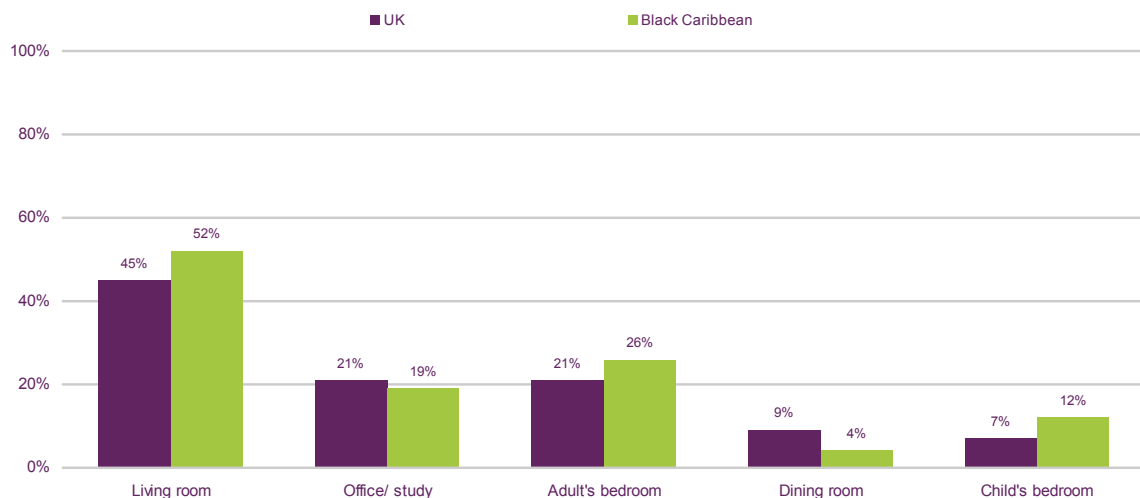
IN1/ IN5 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home? Do you ever access the internet anywhere other than in your home at all?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+, 124 Black Caribbean ABC1, 169 Black Caribbean C2DE)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

The percentage of Black Caribbean adults who use the internet is higher than the average for UK adults (63%). This difference is accounted for by higher use outside the home. Over half (53%) of Black Caribbean adults use the internet outside the home, compared to around one in three (36%) UK adults.

Among adults under 45, a similar proportion of Black Caribbean adults use the internet compared to UK adults overall (83% compared with 79% for UK adults under 45). Use outside the home is more common (66% compared with 50%), while use in the home does not differ significantly (68% compared with 70%).

The living room is the most common location for the PC with internet access.

Figure 136: Location of home computer with internet access



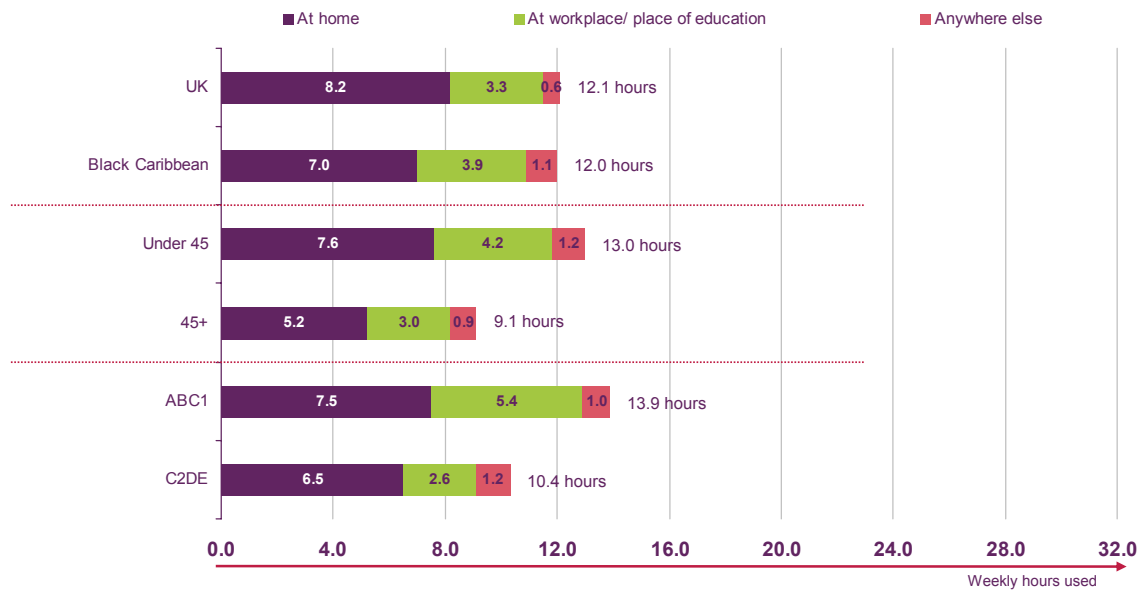
IN2 – Where are the computers in your home?
 Base: Adults aged 16+ with internet access at home (1683 UK, 199 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Most time spent online is at home and hours of use are similar to the UK average

Black Caribbean adults use the internet on average for 12.0 hours per week, with most (7.0 hours) of this in the home.

There is a higher volume of use among adults under 45 and those in ABC1 socio-economic groups.

Figure 137: Volume of internet use per week



IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 216 Black Caribbean, 157 Black Caribbean under 45, 59 Black Caribbean 45+, 113 Black Caribbean ABC1, 99 Black Caribbean C2DE) NB LOW BASE SIZES FOR BLACK CARIBBEAN 45+, C2DE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

While the overall weekly volume of use is similar to the average for UK adults (12.1 hours), use at home is lower and use at the workplace or place of education is higher.

The overall volume of use among Black Caribbean adults under 45 does not differ from similarly aged UK adults, but again use is lower at home and higher at the workplace/ place of education.

The top two online activities are communication and finding information for work or studies

All adults who use the internet were prompted with a list of 18 possible uses of the internet and were asked to say, for each one, whether this was something they did, and how often.

The 18 possible uses have been grouped into eight types, in order to assess breadth of use' of the internet; the extent to which they use the internet for a variety of purposes:.

- communication - uses such as sending or receiving email or using online chat rooms or instant messaging (IM);
- work/ studies information - finding information online for work or for studies;
- transactions - banking or paying bills, using auction sites or buying things online;

- news - looking at news websites;
- creativity - using social networking sites (such as MySpace, Bebo, and Facebook) or maintaining a website or weblog;
- entertainment - listening to radio or playing games online or looking at adult-only websites;
- leisure information - finding information for leisure time including cinema and live music or information for booking a holiday; and
- public/ civic - finding out about public services or looking at political/ campaign/ issues websites.

Figure 138 shows the proportion of internet users who use the internet for each of these activities at least once a week. The average number of the original 18 possible uses is also shown.

The two main uses of the internet are communication and finding work/ studies information. Communication is the only category that more than half say they use the internet for.

Within the Black Caribbean adult population, under-45s, ABC1s, males and those without children in the household all make a broader use of the internet.

Figure 138: Internet activities carried out at least once a week



IN13/14 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each?
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 216 Black Caribbean, 157 Black Caribbean under 45, 59 Black Caribbean 45+, 113 Black Caribbean ABC1, 99 Black Caribbean C2DE, 108 Black Caribbean male, 108 Black Caribbean female, 118 Black Caribbean with children in household, 122 Black Caribbean with no children in household) NB LOW BASE SIZES FOR BLACK CARIBBEAN 45+, C2DE, WITH CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

Within the communications category, although the majority of Black Caribbean adults send or receive emails at least weekly, this measure is lower than for UK adults overall (67% compared with 76%). And breadth of use of the internet is also narrower among Black Caribbean adults compared to the UK adult online population, due to the lower proportion using the internet for transactions and news.

Black Caribbean adults are less likely to buy things online (13% compared with 18%), to do internet banking and to pay bills (9% compared with 27%), or to buy or sell on auction sites (8% compared with 16%).

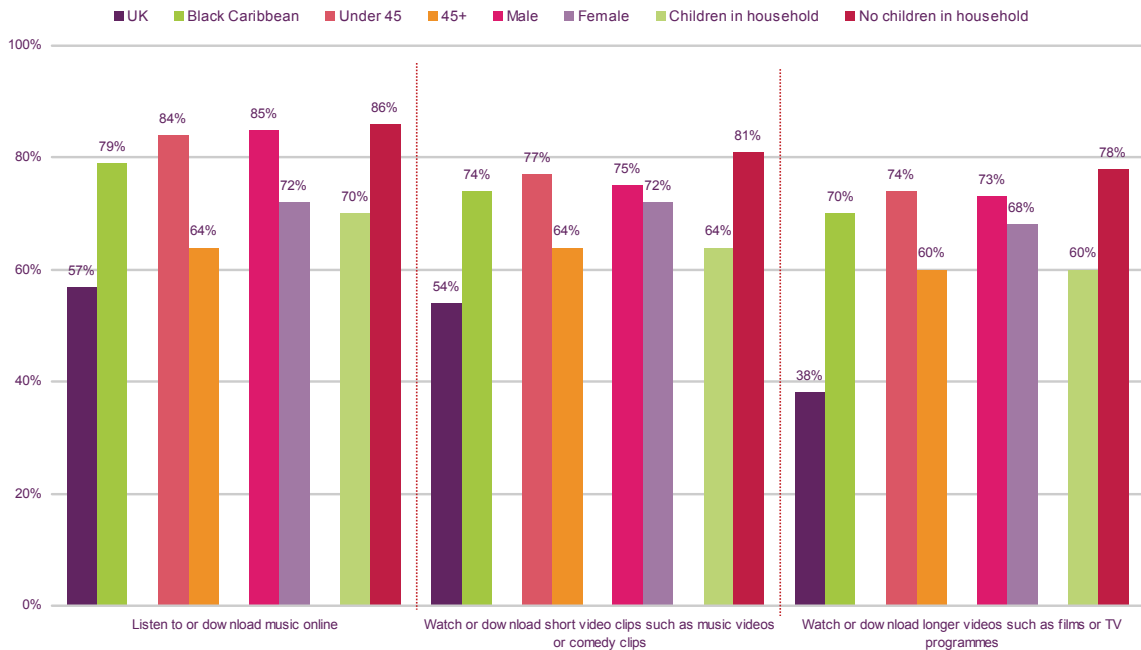
Use of news websites (at least weekly) is also lower for Black Caribbean adults (13% compared with 24%).

The majority download or watch entertainment content online

The majority of Black Caribbean adult internet users ever watch entertainment content online or download this content. Four in five listen to or download music, three-quarters watch or download video clips, and over two-thirds watch or download longer video content.

Using the internet to access entertainment content is more common among adults under 45 and those without children in the household. Downloading music is higher among males.

Figure 139: Using the internet to watch or download video content



IN15A-C – I am now going to read out some things that can be done on the internet, and would like to know how often, if at all, you do each one
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 216 Black Caribbean, 157 Black Caribbean under 45, 59 Black Caribbean 45+, 108 Black Caribbean male, 108 Black Caribbean female, 118 Black Caribbean with children in household, 122 Black Caribbean with no children in household) NB LOW BASE SIZE FOR BLACK CARIBBEAN 45+, WITH CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Accessing entertainment content is more common, in each case, than among UK adults overall. The greatest difference relates to watching longer content such as films or television programmes.

The higher figure for accessing this content is not just related to age; internet users under 45 are more likely to watch or download entertainment content than the average for UK adults in the same age group.

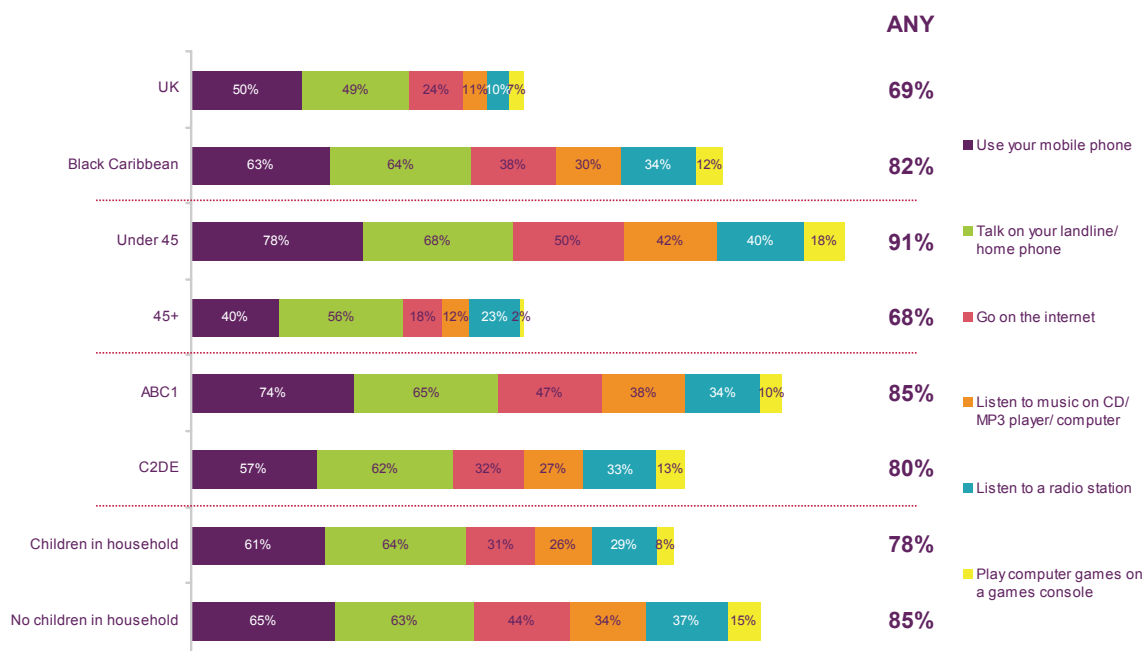
Most Black Caribbeans use another media device while watching television and using the internet

We asked people if they ever use another media device which they are watching television or using the internet.

Eight in ten (82%) Black Caribbean adults use other device while watching television – most frequently, a mobile or landline phone, or the internet.

Use of another media device while watching television tends to be higher among the under-45s. It is more common among ABC1s and those without children in the household, but does not differ to any significant extent by gender.

Figure 140: Using another device while watching television



T3A-F – Do you ever watch TV at home and do these other things at the same time? Is that most times or sometimes when you watch TV?
 Base: All adults aged 16+ with a TV in the household (2887 UK, 296 Black Caribbean, 179 Black Caribbean under 45, 117 Black Caribbean 45+, 127 Black Caribbean ABC1, 162 Black Caribbean C2DE, 134 Black Caribbean with children in household, 162 Black Caribbean with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Using another media device while watching television is more common among Black Caribbeans than among UK adults overall (69%).

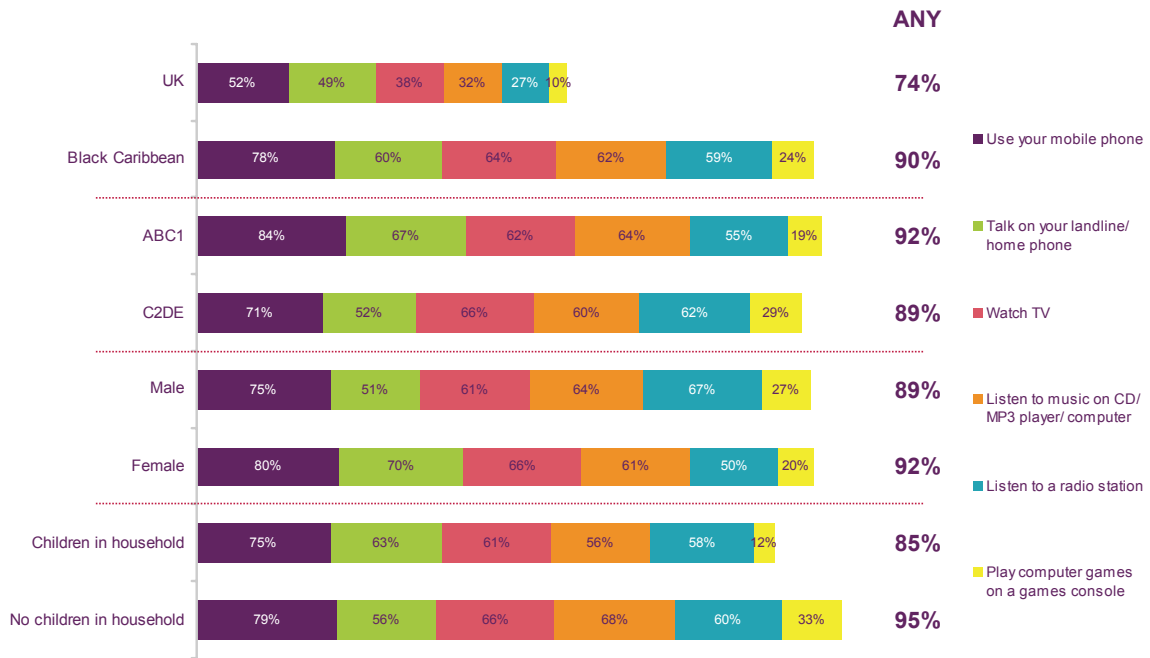
Other research conducted by Ofcom²¹ showed that Black Caribbean adults are more likely than UK adults to have one television set in the household rather than multiple sets (38% compared with 30%). This may have an impact on the likelihood of their using other media devices at the same time as watching television.

This trend is not only due to the younger profile of the Black Caribbean adult population, as those aged under 45 are more likely to use another media device while watching television than under-45s in the UK (91% compared with 83%).

Nine in ten (90%) Black Caribbean adults have ever used other media device while using the internet – most commonly using a mobile or landline phone, watching television or listening to music or radio.

²¹ Communications Market Special Report – Ethnic minority groups and communications services, June 2007

Figure 141: Using another device while using the internet



IN4A-F – Do you ever use the internet at home and do these other things at the same time? Is that most times or sometimes when you use the internet?
 Base: All adults aged 16+ who use the internet at home (1514 UK, 172 Black Caribbean, 102 Black Caribbean ABC1, 66 Black Caribbean C2DE, 88 Black Caribbean male, 84 Black Caribbean female, 79 Black Caribbean with children in household, 93 Black Caribbean with no children in household) NB BASE SIZE TOO LOW FOR BLACK CARIBBEAN 45+. LOW BASE SIZE FOR BLACK CARIBBEAN C2DE, MALE, FEMALE, WITH CHILDREN IN HOUSEHOLD, WITH NO CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

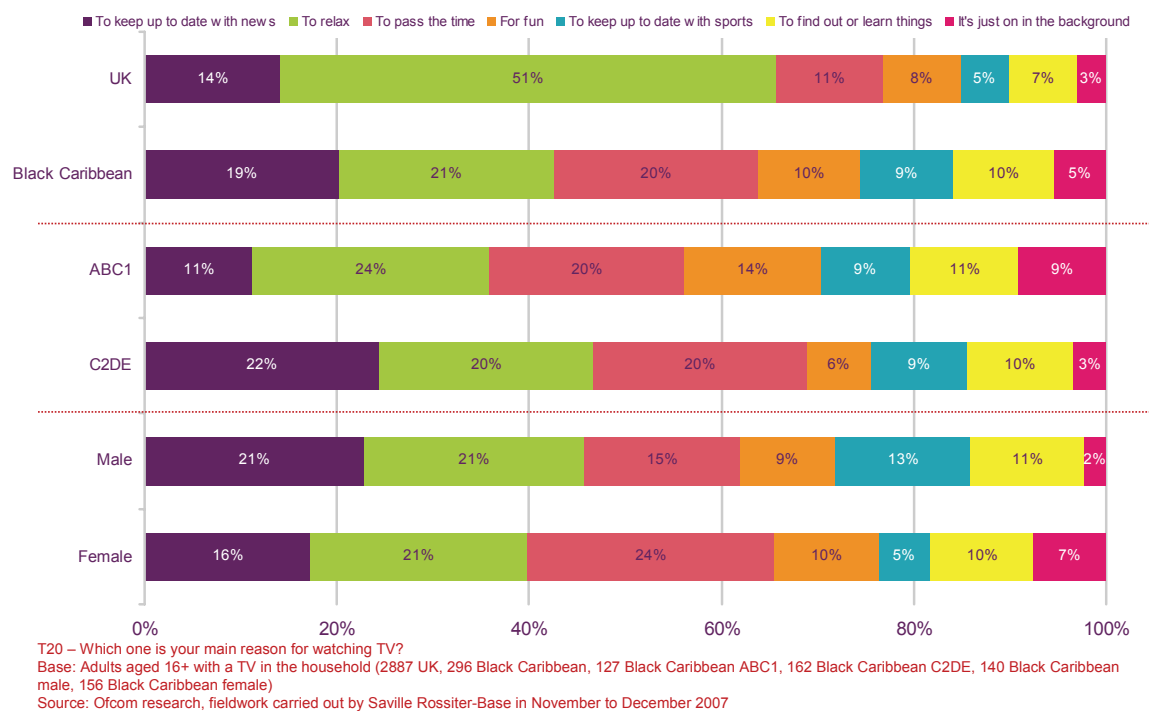
Using more than one media device while using the internet is more common than the UK average (74%). Simultaneous use of devices is also more common among Black Caribbean adults under 45 compared with UK adults of a similar age (at 94% compared with 84%).

The main reasons given for watching television by Black Caribbean adults are more diverse than those given by the UK population as a whole

A diverse range of main reasons for watching television is given by Black Caribbean adults. The most common reasons given for watching television are: to relax, to pass the time and to keep up with the news.

Responses do not differ to any significant extent by age, but those in C2DE socio-economic group are more likely to watch mainly to keep up with news and females are more likely to watch mainly to pass the time.

Figure 142: Main reason for watching television



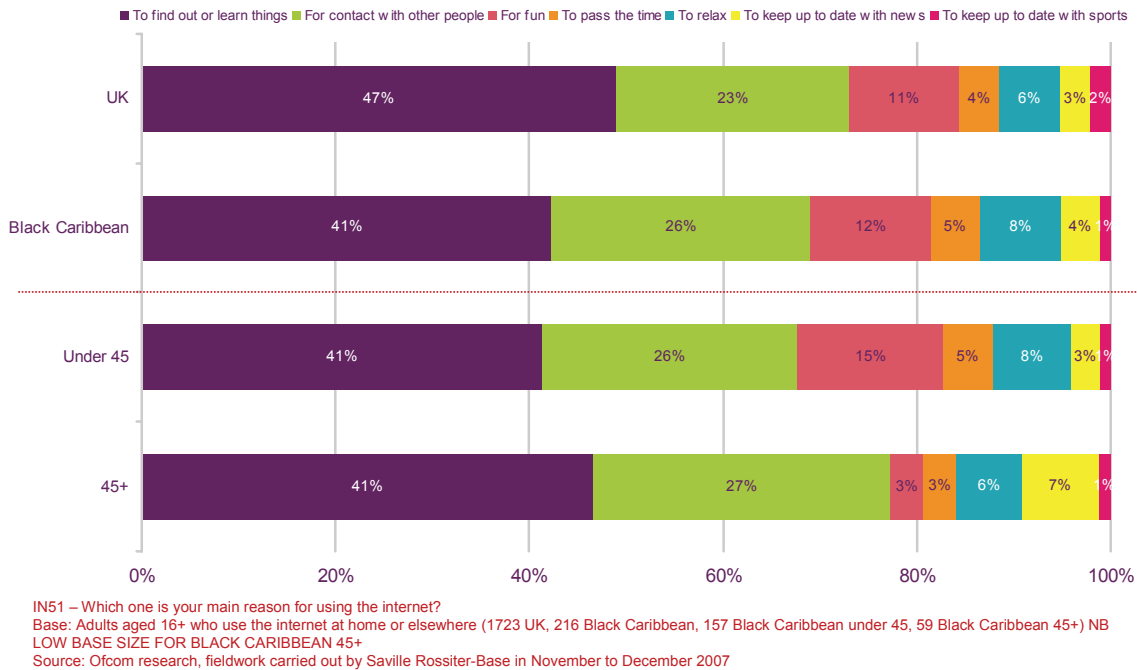
The main reasons Black Caribbean adults give for watching television are much more diverse than those given by UK adults overall, half of whom say they watch to relax.

Black Caribbeans under 45 are more likely than UK adults in the same age group to say they watch television mainly to pass the time (21% compared with 10%).

The two most popular main reasons for using the internet are to find out or learn things, and for contact with other people

Although a minority response, internet users under 45 are more likely than those aged over 45 to say their main reason for using the internet is for fun.

Figure 143: Main reason for using the internet



Black Caribbean internet users are less likely than the UK adults overall to use the functions associated with the internet on a weekly basis, and more likely to use the internet for entertainment. However, this does not influence their choice of main reason for using the internet.

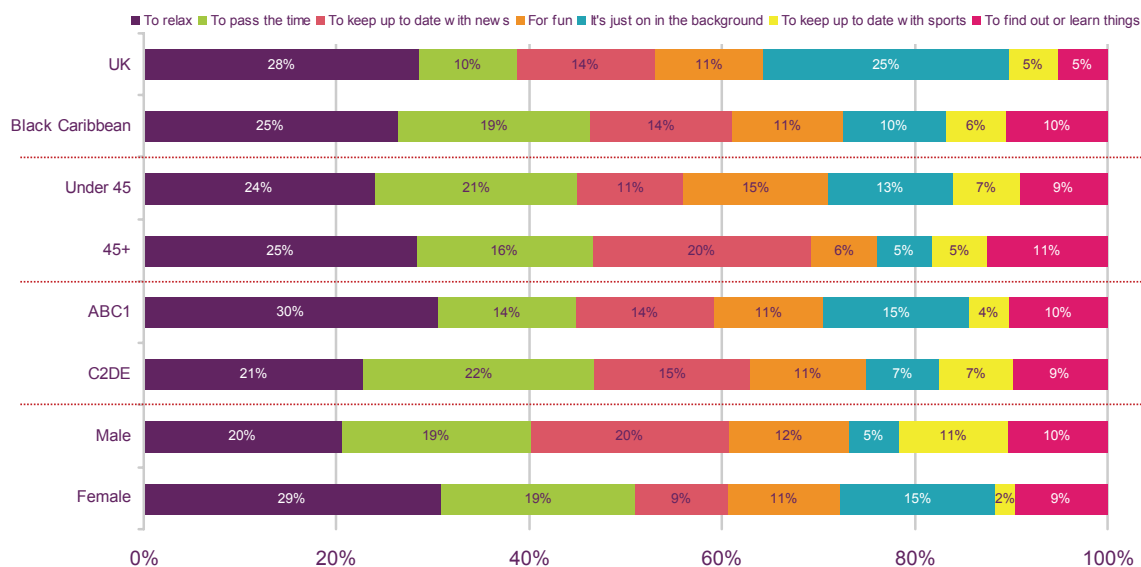
Black Caribbean radio listeners are more likely to listen to pass the time, while the average UK listener is more likely to say “it is just on in the background”

Over four in five (84%) Black Caribbean adults listen to the radio at home, two-thirds (63%) listen through an FM/AM radio set, one in five (21%) listen through their digital television, 18% through DAB radio and 17% via the internet.

As shown in Figure 144, they give a diverse range of main reasons for listening to the radio. The two most mentioned reasons are listening to the radio are to relax (25%), and to pass the time (19%).

Over-44s are more likely to say they listen to keep up to date with news, and are less likely to “just have the radio on in the background”.

Figure 144: Main reason for listening to the radio



R14 – Which one is your main reason for listening to radio?
 Base: Adults aged 16+ who listen to radio at home (2043 UK, 251 Black Caribbean, 151 Black Caribbean under 45, 100 Black Caribbean 45+, 110 Black Caribbean ABC1, 136 Black Caribbean C2DE, 120 Black Caribbean male, 131 Black Caribbean female)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Black Caribbean adults are more likely to listen to the radio at home than the general UK adult population (73%), and more likely than UK adults to listen through DAB radio (13%) or via the internet (9%).

Black Caribbean radio listeners are less likely than UK adults overall to say their main reason for listening to radio is “because it is on in the background” and more likely to say they listen to pass the time.

6.3 Understand

This section looks at interest in, and confidence in using, digital services, attitudes towards the role of media and platform content, trust in television and internet content, checks and judgements made when visiting new websites, and concerns about platforms.

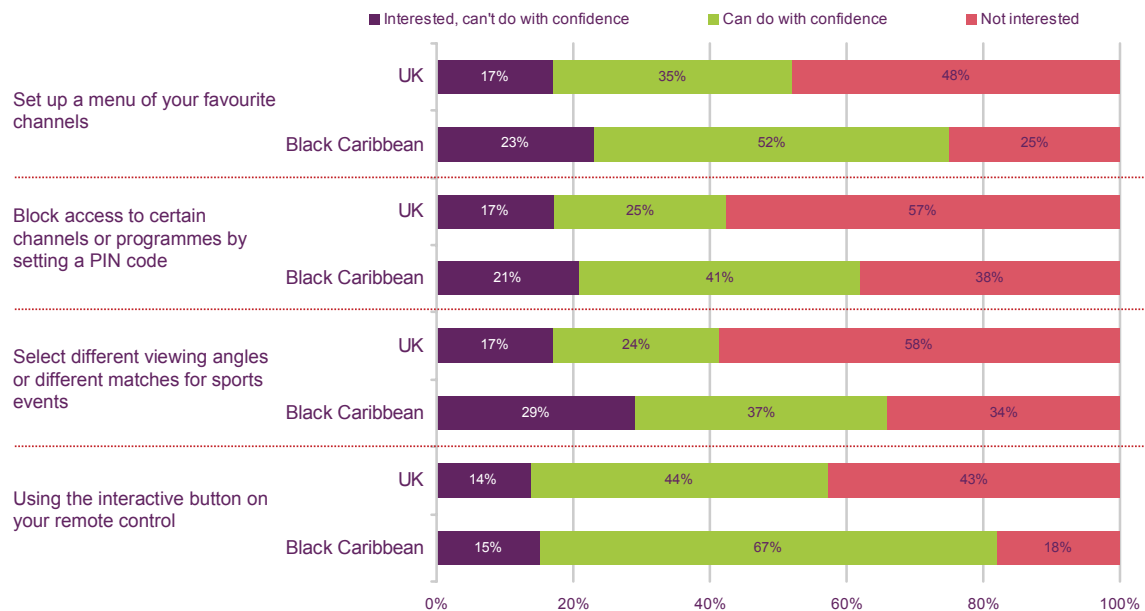
Relatively high levels of interest and confidence in using digital functions and services

Those with digital television at home (81%) were prompted with four functions available through digital television, and asked if each of these was something they were interested in. Those interested in particular functions were then asked to say whether they could do the task with confidence. Figure 145 splits all digital television owners into one of three groups for each of the four functions: those who are not interested, those who are interested and can do it with confidence, and those who are interested but cannot do it with confidence.

The majority of Black Caribbean adults are interested in each of the four digital television functions. The functions of most interest are: using the interactive button on the remote control (82%) and setting up a menu of favourite channels (75%). Around three in five are interested in selecting different viewing angles or matches for sports events (66%) and in using a PIN to block access to certain channels or programmes (62%).

Most people who are interested in functions are also confident in using them. Across the four functions, a higher proportion say they are interested, but not confident, about selecting different viewing angles or matches, and setting up a menu of favourite channels.

Figure 145: Interest and confidence in using digital television services



T4 – I'm going to read out some different types of things you can do with some types of digital television, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ with multichannel TV (2351 UK, 243 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Interest in digital television services is high compared to all UK adults with a digital television service. Additionally, interest in any one of the functions is higher among Black Caribbean adults under 45 than among UK adults of a similar age (90% compared with 75%).

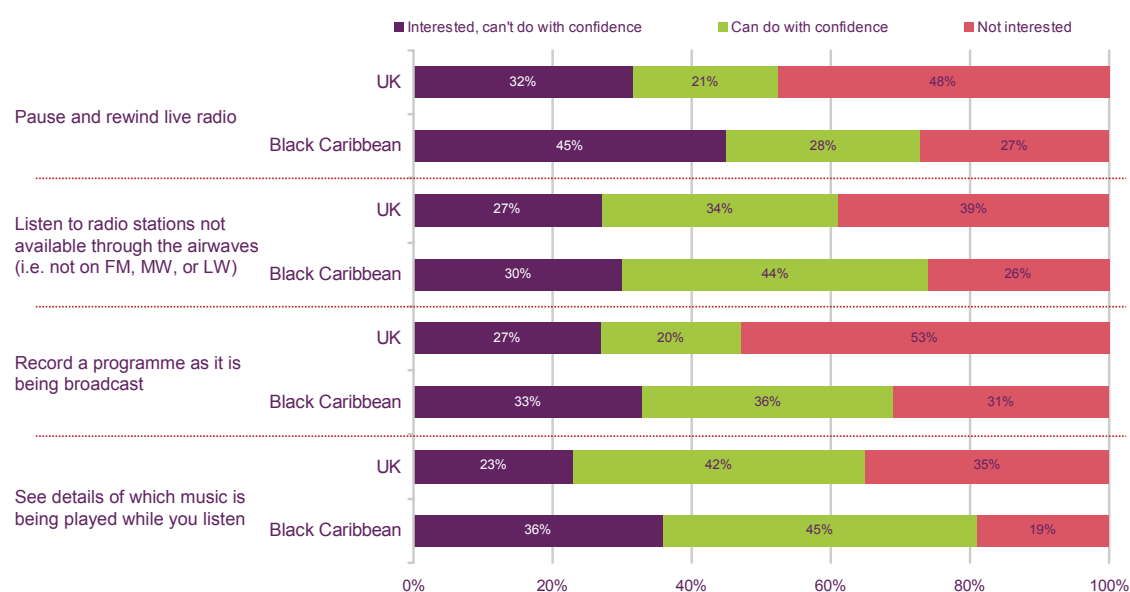
The majority of radio listeners are interested in various radio functions

Those who listen to digital radio at home (43%) were prompted with four functions available through some kinds of digital radio. Several of the functions are specific to certain models of DAB radio rather than to digital radio more generally, and this may have suppressed interest and confidence levels.

More than half of all Black Caribbean digital radio listeners are interested in each of the functions we asked about. Interest is highest in seeing details of the music being played (81%).

While most of those who are interested in a function are also confident in using that function, levels of confidence are lower compared to other digital media; in particular, pausing and rewinding live radio.

Figure 146: Interest and confidence in using DAB radio sets



R3 – I'm going to read out some different types of things you can do with some kinds of digital radio, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ who listen to digital radio at home (766 UK, 131 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

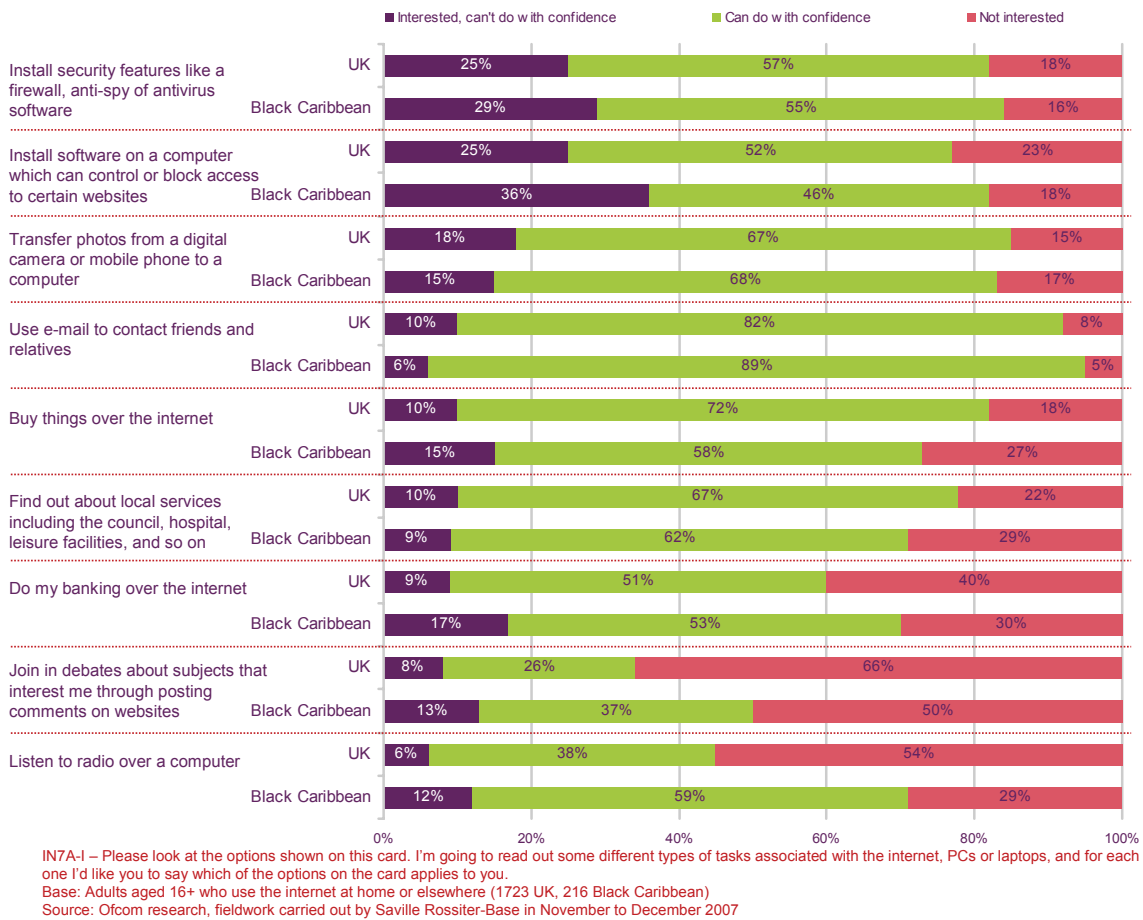
Interest in each of the four functions is higher among Black Caribbean adults who are more likely to listen to digital radio compared to the general UK adult population.

Interest in internet functions is higher than for other platforms

Those who use the internet at home or elsewhere (70%) were prompted with nine tasks or functions that can be carried out on the internet or on the PC/ laptop. Eight of these were of interest to the majority of Black Caribbean adults. Most interest was shown in using email, transferring digital photos to a computer and installing security features or software which can control or block access to websites.

Most Black Caribbeans who express interest in these functions also claim to be confident about using them. Features with high interest but low confidence include installing blocking software or security features, and banking over the internet.

Figure 147: Interest and confidence in using internet functions



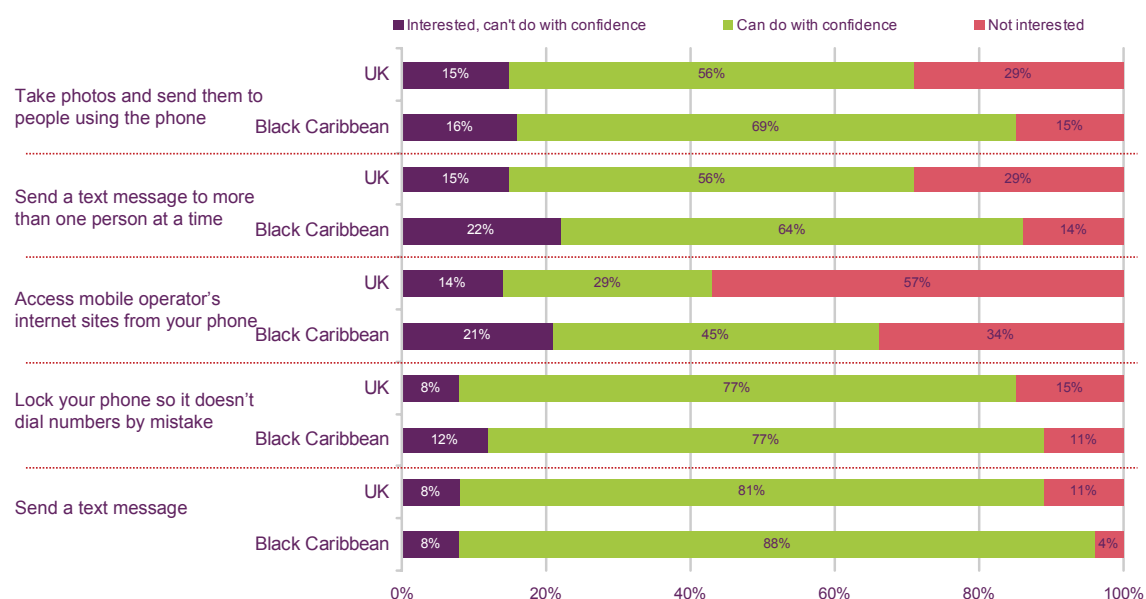
Although all adults have a relatively high interest in PC and internet functions, there are some differences between Black Caribbean adults and the UK average. Black Caribbean adults are more interested in listening to radio over a computer, and in joining in debates through posting comments online. By contrast, UK adults overall are more interested in buying things online and finding out about local services. This lower level of interest in buying things online aligns with the finding that Black Caribbean adults are less likely to use the internet for transactions than are UK adults overall.

Black Caribbean adults show more interest in mobile functions than the UK average

All mobile phone users (88%) were asked how interested they were in five different mobile phone functions. Most people are interested in text messaging (86%), but the majority are interested in each of the functions, with three in five interested in accessing mobile operators' internet sites from the phone.

Most people who are interested in functions are also confident in using them. There are lower levels of confidence for sending a text message to more than one person at a time, and for accessing mobile operators' internet sites.

Figure 148: Interest and confidence in using mobile phone functions



M4 – I'm going to read out some different types of things that you can do with some kinds of mobile phones, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ with a mobile phone (2481 UK, 265 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Compared to all UK adults, interest is higher for all the above interactive functions among Black Caribbean adults.

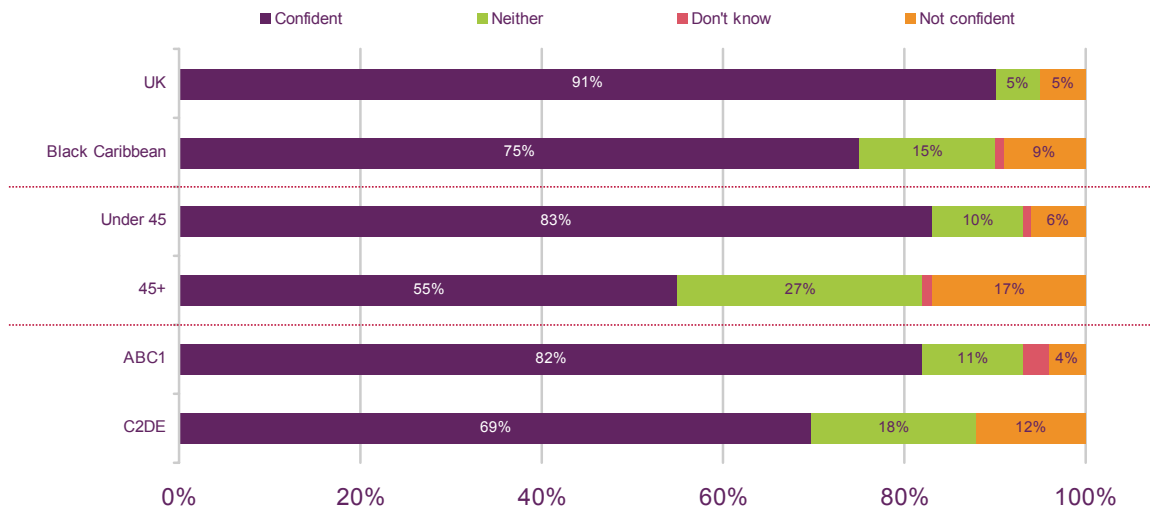
Black Caribbean adults under 45 have more interest in accessing mobile operators' internet sites than UK adults under 45 (69% compared with 54%).

Most Black Caribbeans are confident in finding information online, but have some concerns about providing personal information

Three in four (75%) Black Caribbean adults are confident about finding the content or information they want when they use the internet. Around one in ten say they are not confident, and the remaining 15% say they are neither confident nor unconfident.

Black Caribbean adults under 45 (83%) and those in ABC1 socio-economic groups (82%) are the most confident.

Figure 149: Confidence in finding content online



IN9 – How confident are you that you can find the content or information you want when you go online?
 Base: All adults aged 16+ who use the internet at home or elsewhere (1514 UK, 216 Black Caribbean, 157 Black Caribbean under 45, 59 Black Caribbean 45+, 113 Black Caribbean ABC1, 99 Black Caribbean C2DE) NB LOW BASE SIZE FOR BLACK CARIBBEAN 45+, C2DE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

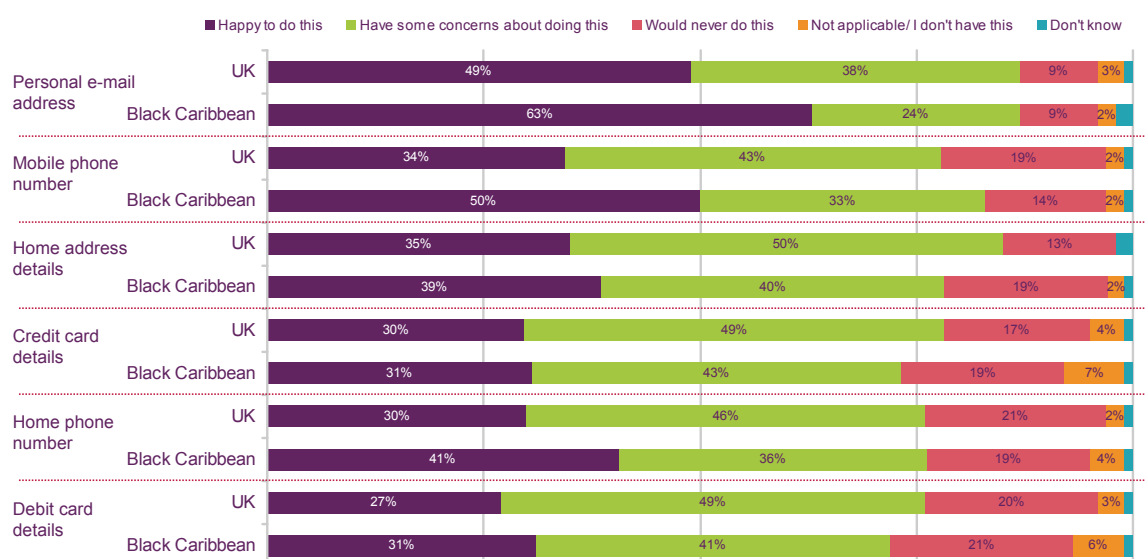
The degree of confidence among Black Caribbean adults is lower than for UK adults overall (91%) because of the higher percentage giving a neutral response.

Although Black Caribbean adults under 45 are more confident, this is to a lesser degree than UK adults overall in this age group (93%).

While the majority of internet users in the Black Caribbean adult population (63%) say they are happy to provide their personal email address online, significantly fewer say they are happy to provide their mobile or home phone number, home address, credit or debit card details.

Approximately two in five say they have some concerns about providing their debit card, credit card and home address details. Around one in five say they would never provide their debit or credit card details, their home address or their phone number.

Figure 150: Information prepared to give when registering on websites



IN41 – Please look at the options shown on this card. I'm going to read out some details about information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns.
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 216 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Black Caribbean adults are generally more open to providing personal information such as personal email addresses, or mobile or home phone numbers, than the UK average.

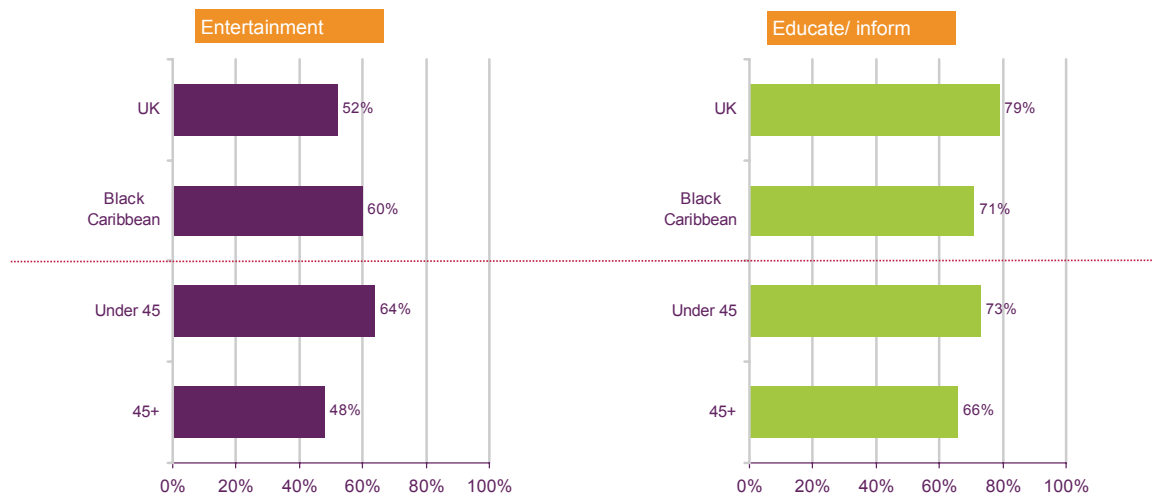
However, Black Caribbean adults are less likely to be happy about entering debit card details online than UK adults overall. This reluctance might be an influence on the lower use of online purchasing by Black Caribbean adults.

The main role of the internet is more likely to be seen as to inform than to entertain

Black Caribbean adults are more likely to say the main role of the internet is to educate/inform (71%) rather than to entertain (60%).

Internet users aged under 45 are more likely than users over 44 to say that the main role is for entertainment. There is no demographic variation among those who say the main role is to entertain.

Figure 151: Main role of the internet: to entertain, or to inform and educate



IN48D-E – The main role of the internet should be to provide entertainment/ The main role of the internet should be to inform and educate people
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 216 Black Caribbean, 157 Black Caribbean under 45, 59 Black Caribbean 45+) NB
 SMALL BASE SIZES FOR BLACK CARIBBEAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While most Black Caribbean adults say that the internet is for education, they are less likely than UK adults to hold this view, which is relatively consistent across the age groups.

Black Caribbean adults are more likely than UK adults overall to view the internet as being for entertainment. This is consistent with the earlier finding that downloading and watching content online is much more common among Black Caribbean adults.

Awareness of funding is higher for broadcasting than for the internet

Funding of television content

BBC channels are funded by the licence fee, and commercial public service broadcast (PSB) channels are funded by advertising (programme sponsorship provides a secondary revenue stream).

Funding of radio content

BBC stations are funded by the licence fee and commercial stations are funded by advertising (programme sponsorship provides a secondary revenue stream).

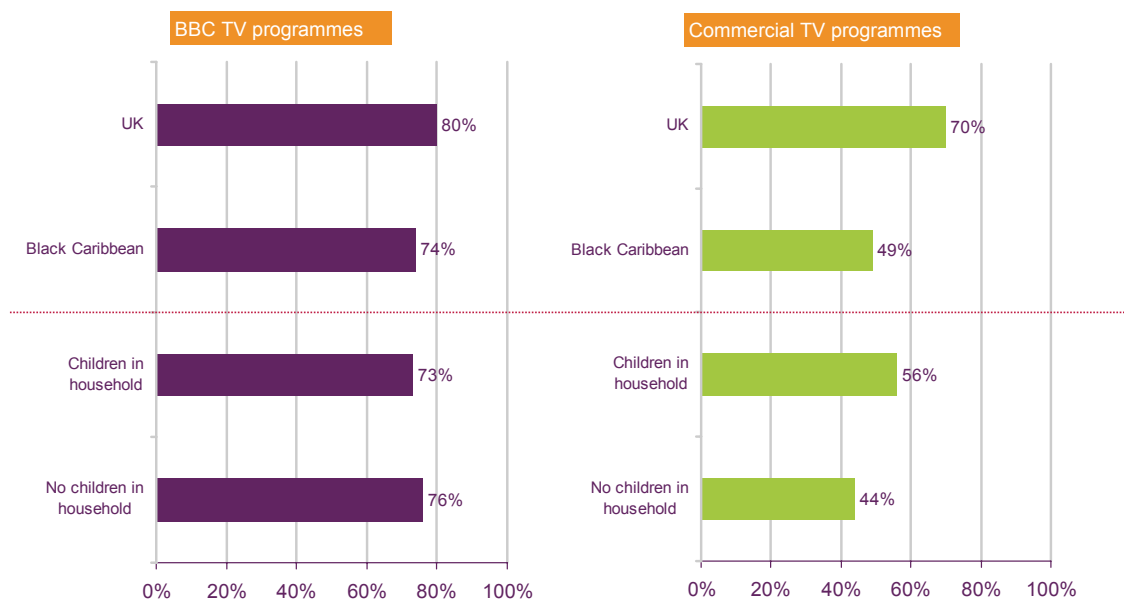
Funding of websites

The BBC website is funded by the licence fee and search engine websites such as Google are funded by advertising.

Three in four (74%) Black Caribbean adults are aware of how BBC television programmes are funded and half (49%) are aware of how commercial television programmes are funded.

Awareness does not vary to any significant extent by age or socio-economic group.

Figure 152: Understanding main source of television programme funding



T8/T9 – How would you say BBC TV programmes are mainly funded?/ How would you say programmes are mainly funded on ITV, Channel 4 and Five?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 135 Black Caribbean with children in household, 165 Black Caribbean with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Compared to the UK adult population overall, awareness of television programme funding is low.

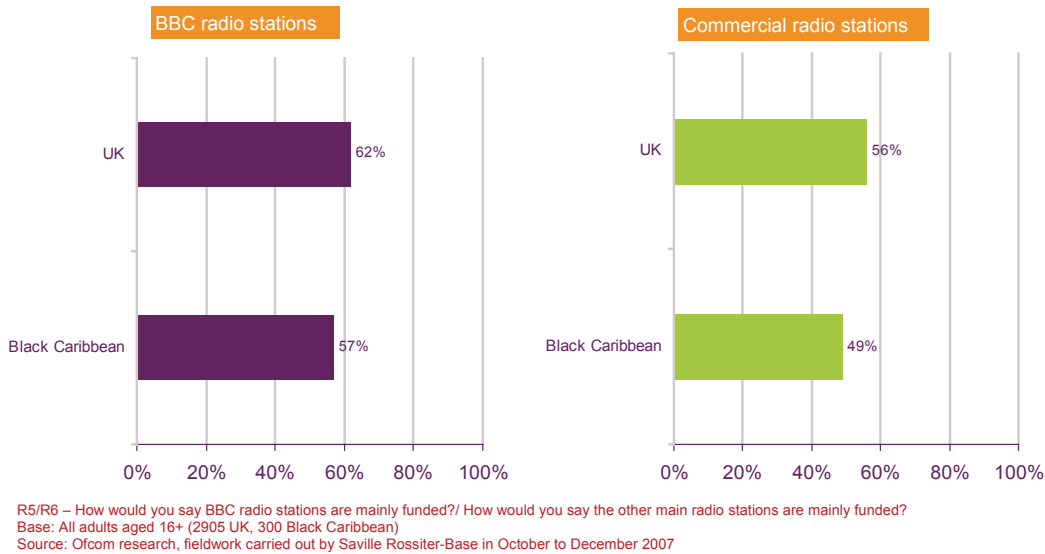
Among adults under 45, there is no difference in awareness of the BBC licence fee as the main source of funding (73%), but Black Caribbean adults under 45 are less likely to be aware of commercial television programme funding than UK adults in general (50% compared with 64%).

Black Caribbean adults are more aware of BBC radio funding than of commercial radio funding

Among Black Caribbean adults, over half (57%) are aware of the main source of funding for BBC radio stations, and half (49%) are aware of the main funding source for commercial radio stations.

There are no significant variations in awareness within the Black Caribbean adult population.

Figure 153: Understanding main source of radio station funding

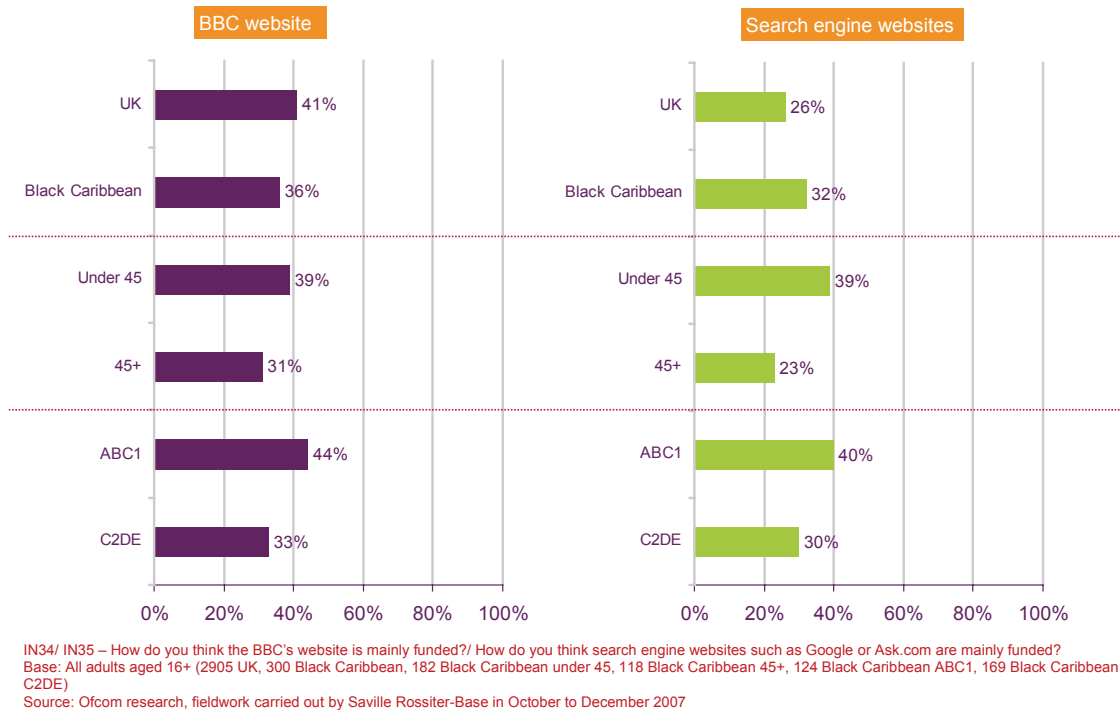


Compared to all UK adults, this represents lower awareness of the funding of commercial radio stations, but is similar for awareness of BBC radio stations' funding.

Around one-third are aware of how the BBC website and/or search engines are funded

Around one-third (36%) are aware of how the BBC website is mainly funded, with awareness of search engines' funding at a similar level (32%). Awareness of websites' funding is higher among under-45s and ABC1s.

Figure 154: Understanding main source of website funding



Compared to the UK adult population, awareness levels are mixed; there is lower awareness of BBC website funding and higher awareness of search engines' funding.

While UK adults overall are less aware of search engine funding than BBC website funding, this is not evident for Black Caribbean adults, where awareness is around the same level.

Awareness of the regulatory environment is higher for broadcasting than for internet or mobile phone content regulation

Television regulatory environment

BBC channels are regulated by the BBC Trust and Ofcom and UK commercial channels are regulated by Ofcom.

Radio regulatory environment

BBC stations are regulated by the BBC Trust and Ofcom and UK commercial stations are regulated by Ofcom.

Internet regulatory environment

There is no statutory regulatory body generally responsible for audio-visual content on the internet.

The BBC Trust, established by Royal Charter, issues a service licence for bbc.co.uk which encompasses BBC iPlayer and can consider any complaints about its content.

The Association for Television On-Demand (ATVOD) is a self-regulatory body committed to protecting consumers of on-demand audio-visual content on services provided by its members. Its current full members are BT, On Demand Group, Virgin Media, Channel 4, BBC (Affiliate Member), Tiscali, FilmFlex and ITV.

Sites based on user-generated content (UGC) are not subject to any statutory regulation, beyond the prohibition on illegal content.

Mobile phone content regulatory environment

All UK mobile phone operators comply with a voluntary code, under which they commit to controlling under-18s' access to adult content.

- Mobile operators have an age check system under which subscribers must show that they are 18 or over to access 18 rated content.
- In addition, a subscriber can request that the block be applied to an existing mobile number.

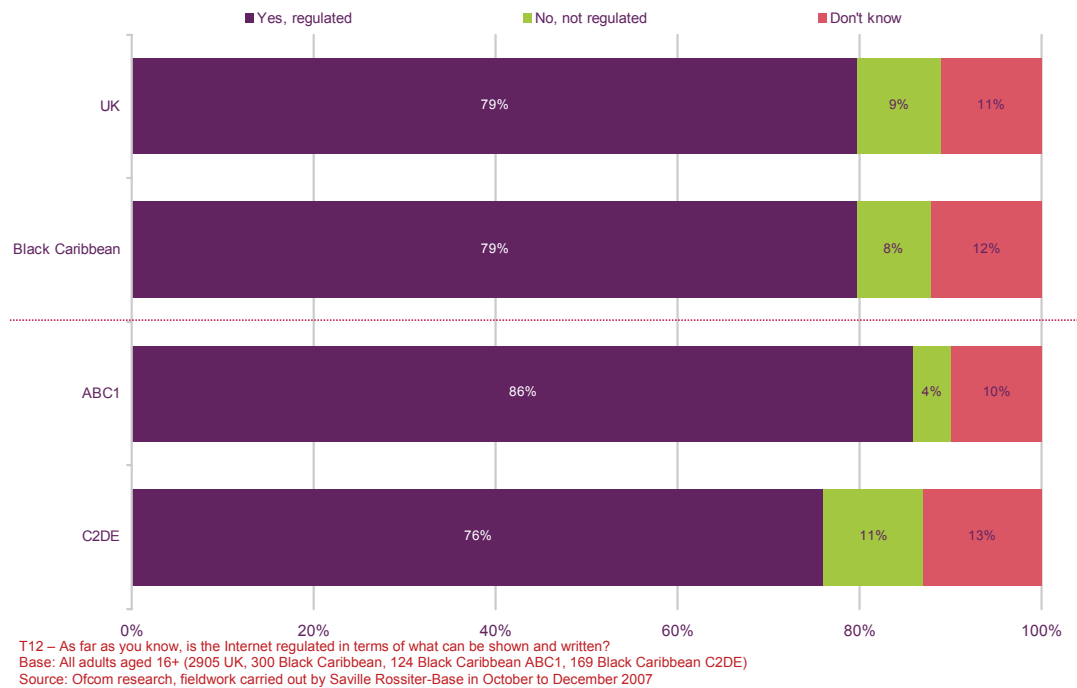
Electronic gaming regulatory environment

There is an industry self-regulatory framework in place for video games, under which games are voluntarily rated and labelled under the Pan European Game Information system (PEGI). PEGI ratings (3+, 7+, 12+, 16+ and 18+) provide information to consumers about the ages for whom a particular game is appropriate. In addition, in the UK, games with adult content (gross violence, criminal or sexual activity) must be reviewed and rated by the British Board of Film Classification, and bear a BBFC label. Under the Video Recordings Act 1984, games which receive BBFC 18 rating must not be sold to minors.

Four in five Black Caribbean adults say that television programmes are regulated.

Awareness is lower among adults in C2DE socio-economic groups.

Figure 155: Whether believe television programmes are regulated



Perceptions of television content regulation do not differ from the general UK adult population.

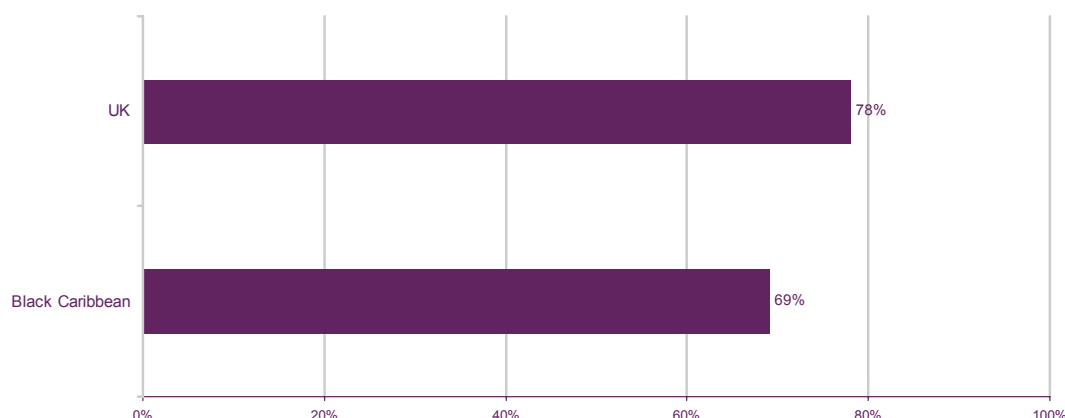
Most Black Caribbean adults are aware that the watershed is 9pm although awareness is lower than for the UK as a whole

One element of television regulation is the watershed - the requirement that any content which contains material that is unsuitable for children should not, in general, be shown before 21:00 or after 05:30.

Just over two-thirds (69%) of Black Caribbean adults responded correctly that there is a television watershed which starts at 9pm.

Awareness does not differ to any significant extent by demographics.

Figure 156: Whether aware of 9pm television watershed



T14 – Is there a time of day after which programmes that are considered unsuitable for children can be shown? What time is this?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Awareness of the watershed is at a lower level than for UK adults.

Nearly two-thirds are aware that radio broadcasts are regulated

The majority (63%) of Black Caribbean adults say that radio is regulated in terms of what can be broadcast, and one in five are unsure.

Responses do not vary to any significant extent by demographics.

Figure 157: Whether believe radio broadcasts are regulated



R9 – As far as you know, is radio regulated in terms of what can be broadcast?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

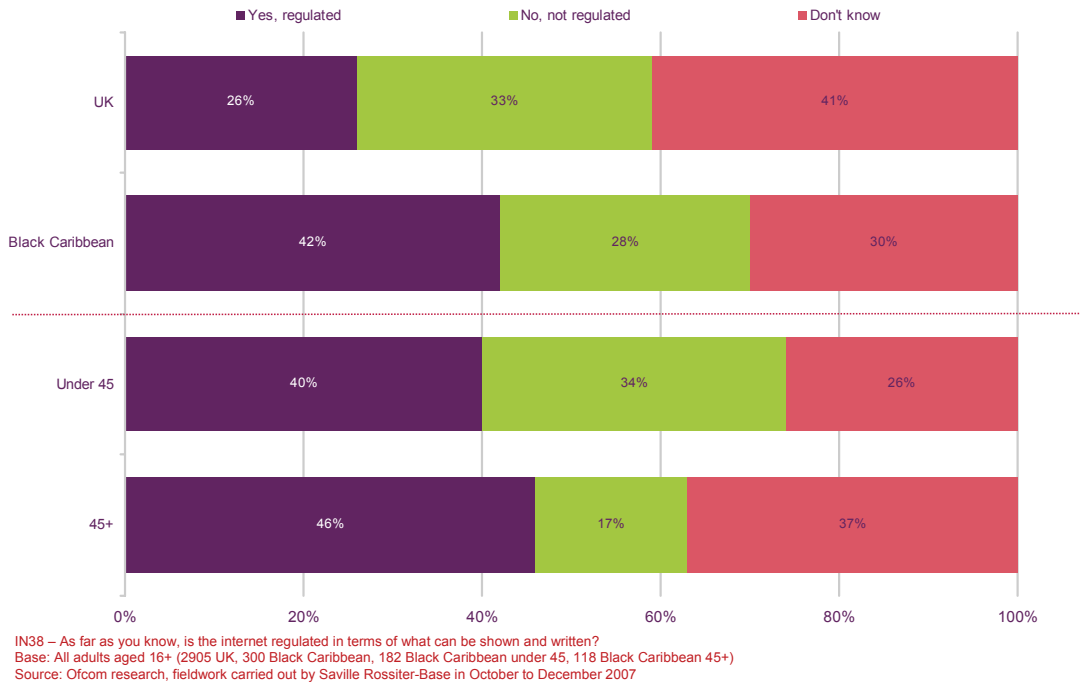
The belief that radio broadcasts are regulated is more evident than among the general UK adult population (58%). Listening to the radio at home is more common among Black Caribbean adults overall (84% compared with 73%), and this may have some impact on the responses.

Two in five Black Caribbean adults say the internet is regulated, higher than the UK average

Opinion on whether the internet is regulated is split among Black Caribbean adults; 42% say it is regulated, 28% say it is not, and 30% are unsure.

Black Caribbean adults under 45, who are more likely to use the internet, are more likely than all Black Caribbean adults to say the internet is not regulated, although 40% do say it is.

Figure 158: Whether believe internet content is regulated



Black Caribbean adults are more likely than the UK average to believe the internet is regulated.

The younger profile of the Black Caribbean adult population appears to account for this difference. Black Caribbean adults under 45 are more likely than similarly aged adults in the UK adult population say that internet content is regulated (40% compared with 28%).

There is some confusion about whether mobile phone content is regulated

When asked whether mobile phone content (such as web pages and downloaded videos) is regulated, the most common response among Black Caribbean adults is ‘don’t know’, indicating confusion in this area.

C2DE socio-economic groups are more likely to be unsure, with adults in these groups also less likely to be mobile phone users.

Figure 159: Whether believe mobile phone content is regulated



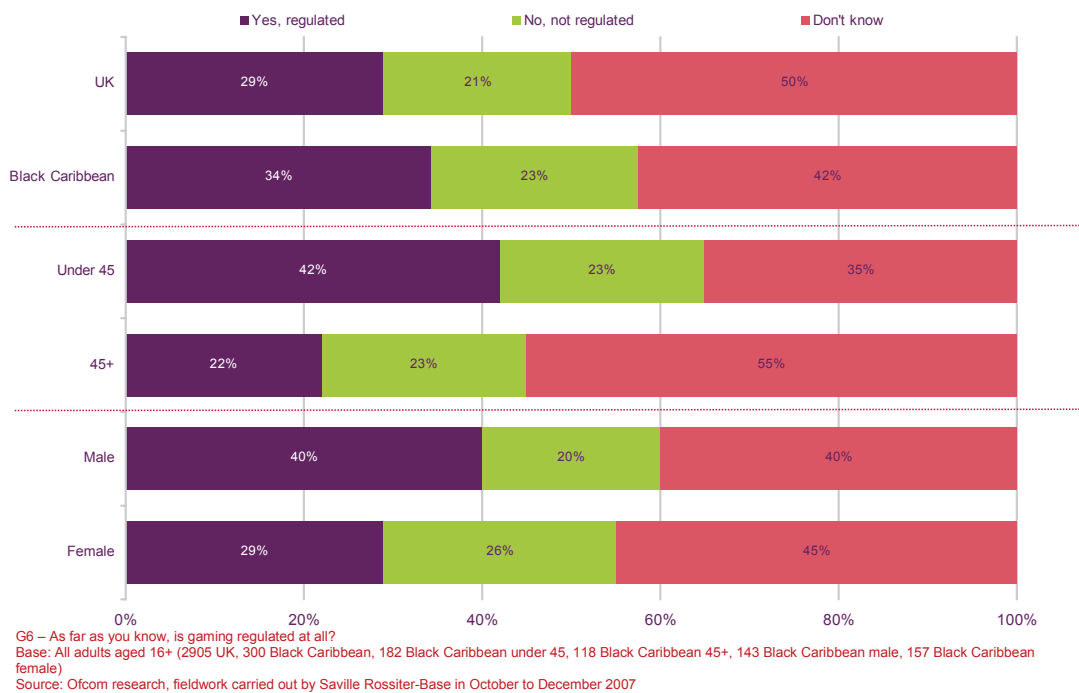
Black Caribbean adults are more likely than UK adults overall to say that mobile phone content is regulated, but more in each group are unsure.

There is some confusion as to whether gaming is regulated or not

As with awareness of internet and mobile regulation, there is confusion about gaming regulation. Two in five say they don't know whether gaming is regulated, and one in three believe it is.

The belief that gaming is regulated is more evident among under-45s and males, with adults in these groups more likely to play electronic games.

Figure 160: Whether believe gaming is regulated



Responses regarding whether gaming is, or is not, regulated do not differ to any significant extent from those given by the general UK adult population. Both groups are more likely to say they do not know, rather than give an opinion, although UK adults in general are significantly more likely to say they do not know.

Attitudes towards protection from content are stronger than attitudes towards freedom of expression

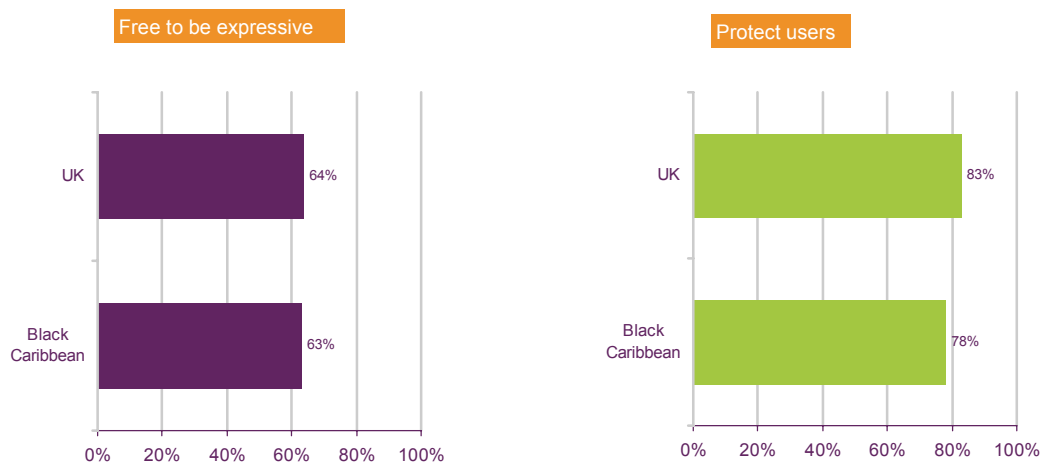
The majority of Black Caribbean adults who use the internet agree (either strongly or slightly) that:

- *internet sites must be free to be expressive and creative; and*
- *internet users must be protected from seeing inappropriate or offensive content.*

While some people agree with both statements, agreement is stronger that users must be protected.

Responses do not vary to any significant extent within the Black Caribbean adult population.

Figure 161: Attitudes towards internet content: *must be free to be expressive and creative vs users must be protected from offensive or inappropriate content*



IN48A-B – Internet sites must be free to be expressive and creative/ Internet users must be protected from seeing inappropriate or offensive content
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 216 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Both the direction and strength of attitudes towards internet content match that for the UK adult population.

A similar proportion agree that television programmes must be free in to be expressive and creative as well as that users need protection

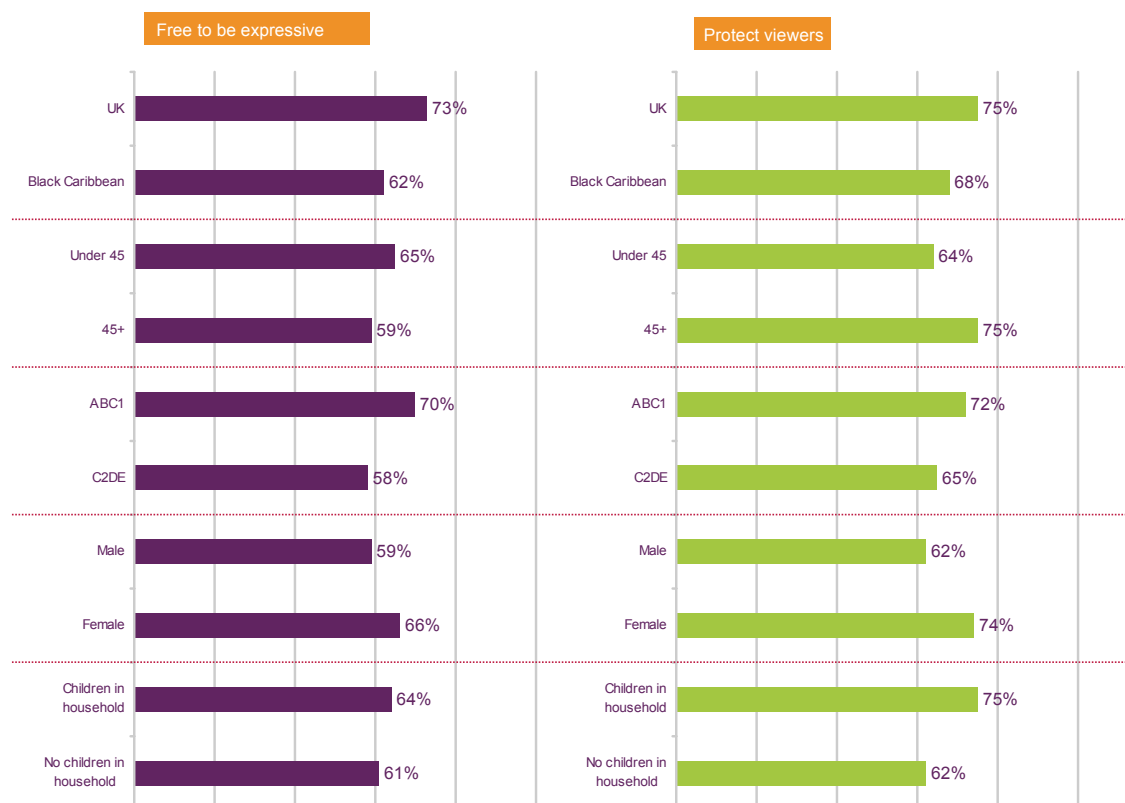
The majority of Black Caribbean adults agree (either strongly or slightly) that:

- *television programmes must be free to be expressive and creative; and*
- *television viewers must be protected from seeing inappropriate or offensive content.*

Agreement is at broadly equal levels for these two statements.

There is little variation within the Black Caribbean adult population regarding whether television programmes should be free to be expressive and creative; although there is higher agreement from those in ABC1 socio-economic groups. The statement that television viewers must be protected brings more diverse opinions, with higher agreement among over-44s, ABC1s, females and those with children in the household.

Figure 162: Attitudes towards television content: *must be free to be expressive and creative vs viewers must be protected from offensive or inappropriate content*



T17A-B – TV programmes must be free to be expressive and creative/ TV viewers must be protected from seeing inappropriate or offensive content
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+, 124 Black Caribbean ABC1, 169 Black Caribbean C2DE, 143 Black Caribbean male, 157 Black Caribbean female, 135 Black Caribbean with children in household, 165 Black Caribbean with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Responses are in a similar direction to those of the general UK adult population; with agreement with the two statements being at similar levels, although fewer Black Caribbean adults agree with each statement.

While the majority do agree with each of the statements, Black Caribbean adults are more likely to have neutral (neither agree not disagree) views towards television content, compared to UK adults overall.

Over two in five agree that they tend to trust what they see on television

Black Caribbean adults with at least one television in the household (99%) are more likely to trust (44%) than to distrust (29%) what they see when they watch television. Trust in television content does not differ by demographics within the Black Caribbean adult population.

It should be noted that this question did not distinguish between different genres of television programming or between different television channels, whether UK or foreign-based.

Nine in ten (93%) Black Caribbean adults say they watch news and factual programmes. Among viewers, the majority (59%) say their level of belief in these programmes varies according to the channel, or that they are sceptical about the information on these programmes. This degree of critical evaluation is more evident among those aged over 44, those in C2DE socio-economic groups, and males.

Figure 163: Trust in television: *when I watch television I tend to trust what I see*



T17D – ‘When I watch TV I tend to trust what I see’
 Base: Adults aged 16+ with a TV in the household (2887 UK, 296 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Trust in television is at a similar level to the average for all UK adults (41%).

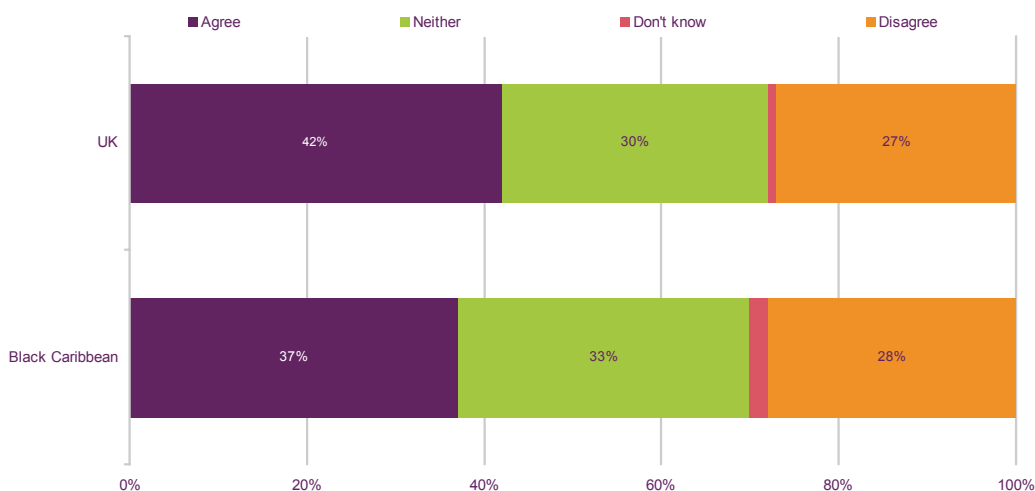
A similar proportion of Black Caribbean adults say they watch news or factual programmes on television (94% for the UK overall), but critical evaluation among Black Caribbean adults is more evident than among the UK adult population (51%).

There is little consensus on whether Black Caribbean internet users trust what they read or see online

Trust in online content is at a similar level as for television content among the Black Caribbean adult population (37%). However, the proportion giving a neutral (neither trust nor distrust) response is higher for online content. One in three say they do not agree or disagree, and one in four disagree.

Responses do not vary to any significant extent by demographics within the Black Caribbean community.

Figure 164: Trust in internet: *when I visit websites I tend to trust what I read or see*



IN49A – ‘When I visit websites, I tend to trust what I read or see’
 Base: All adults aged 16+ who use the internet at home or elsewhere (1514 UK, 216 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

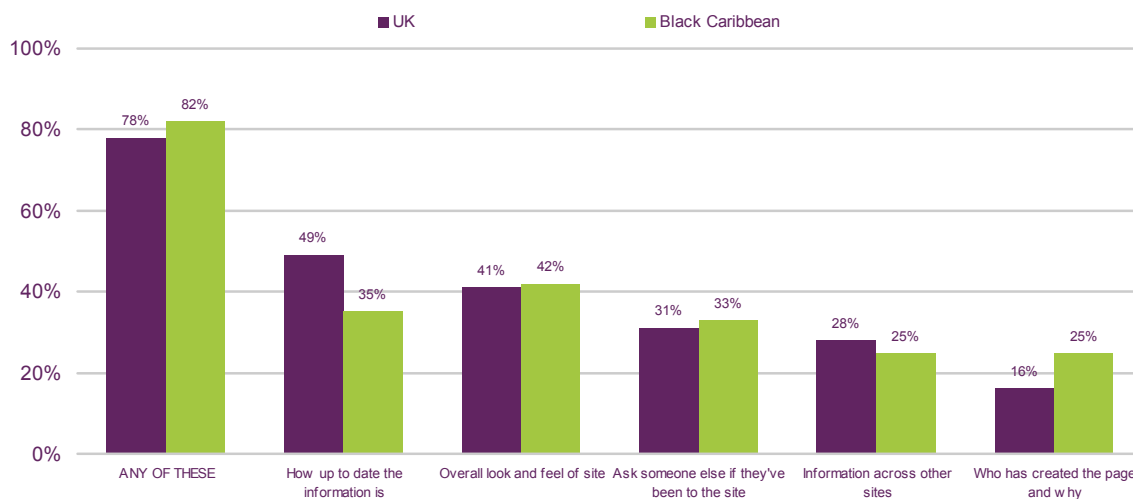
There are no significant differences between the Black Caribbean and the UK average population in terms of trust in online content. While Black Caribbean adults are less likely to use the functions associated with the internet on a weekly basis, and more likely to use the internet for entertainment, this does not appear to have influenced their degree of trust in online content.

Most internet users check new websites before they use them and make judgements before entering personal details

We asked people whether they check a new website before using it, and whether they make any judgement before entering personal details on a website. Seventy-eight per cent of Black Caribbean internet users ever use new websites. Visiting new websites is more common among users under 45 and those in ABC1 socio-economic groups.

Among those that do visit new websites, four in five (82%) make some kind of check when doing this (Figure 165), but the majority of users make no checks.

Figure 165: Checks made when visiting new websites



IN16 – Thinking about new websites you visit, which, if any, of these things would you check?
 Base: All adults aged 16+ who use the internet at home or elsewhere who visit new websites (1536 UK, 171 Black Caribbean) NB BASE SIZE TOO LOW FOR ANALYSIS BY AGE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

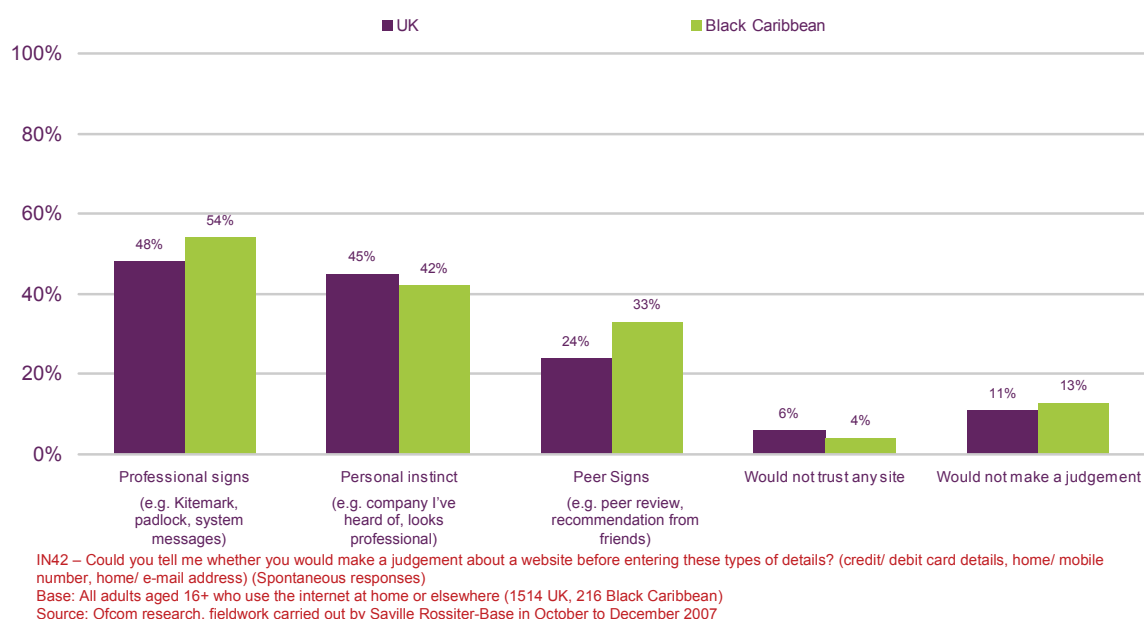
Fewer Black Caribbean adults internet users visit new websites, compared with UK internet users overall (91%). However, the proportion of those who do visit new websites and also make any of these checks is comparable with the average for the UK.

Although they are less likely than UK users overall to check how up to date the website is, Black Caribbean users are more likely to check who has created the page, and why.

Looking for professional signs and using personal instinct are the two most-mentioned judgements

The majority of Black Caribbean adults (87%) say they make a judgement about a website before entering personal details; in particular, looking for professional signs (such as a kitemark, padlock sign or system message) or using their personal instinct (such as a known company or a professional-looking site). Just over one in ten (13%) say they would not make any judgement.

Figure 166: Judgements made about a website before entering personal details



The proportion of users making a judgement does not differ from UK internet users overall (89%), but Black Caribbean users are more likely to judge based on professional signs or peer signs (such as a review or recommendation) than are UK adults in general.

Most have concerns about television and internet content and mobile phones

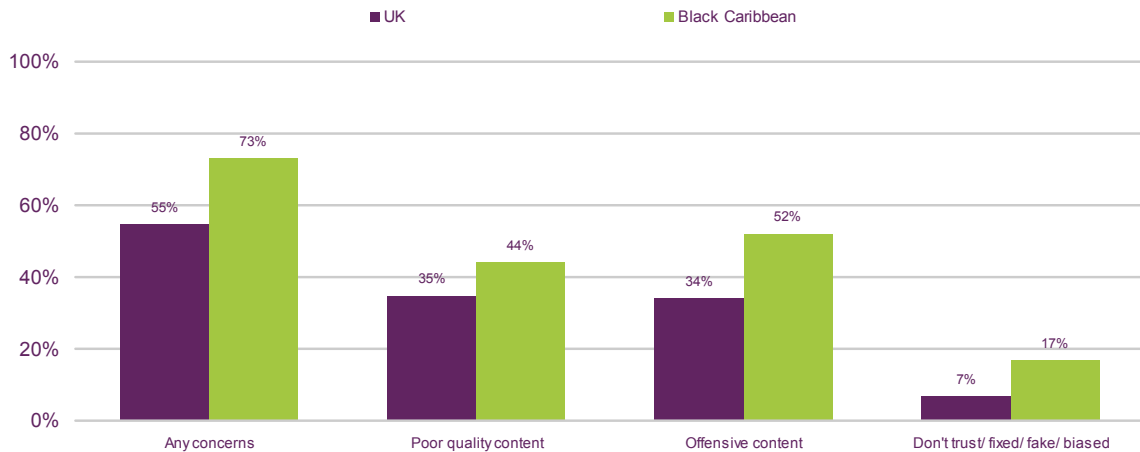
The majority (73%) of Black Caribbean adults have a concern about what is on television. Unprompted responses regarding these concerns have been grouped into three themes:

- poor quality content - responses such as *too many repeats, too many reality television programmes, poor quality programmes* and *too many advertising breaks*;
- offensive content - responses such as *violence, bad language, sex/ nakedness* and *people behaving badly*; and
- don't trust/ fixed/ faked/ biased - responses such as *phone-in competitions that are fixed/ faked*.

Concerns about what is on television most commonly relate to offensive content (52%) and poor quality programmes (44%). The four most mentioned concerns are violence, sex/ nakedness, bad language, and too many repeats.

Responses do not vary to any significant extent by demographics.

Figure 167: Concerns about what is on television



T10 – Can you tell me if you have any concerns about what is on TV? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Concerns about what is on television, and each of the three types of concern, are more common than among UK adults overall.

When asked to what extent they are concerned about what is on television, around two in five (42%) Black Caribbean adults say they are either very, or fairly, concerned.

The extent of concern about what is on television is higher among over-44s. There are no other demographic variations.

Figure 168: Extent of concern about what is on television



T11 – Overall, how concerned are you about what is on TV?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+, 124 Black Caribbean ABC1, 169 Black Caribbean C2DE, 135 Black Caribbean with children in household, 165 Black Caribbean with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

This overall extent of concern is similar to UK adults overall (36%). Therefore, although Black Caribbeans mention more concerns about what is on television, it does not appear

that these are causing greater concern than that experienced by the UK adult population in general.

Black Caribbean radio listeners are more concerned about what is on the radio than UK radio listeners in general

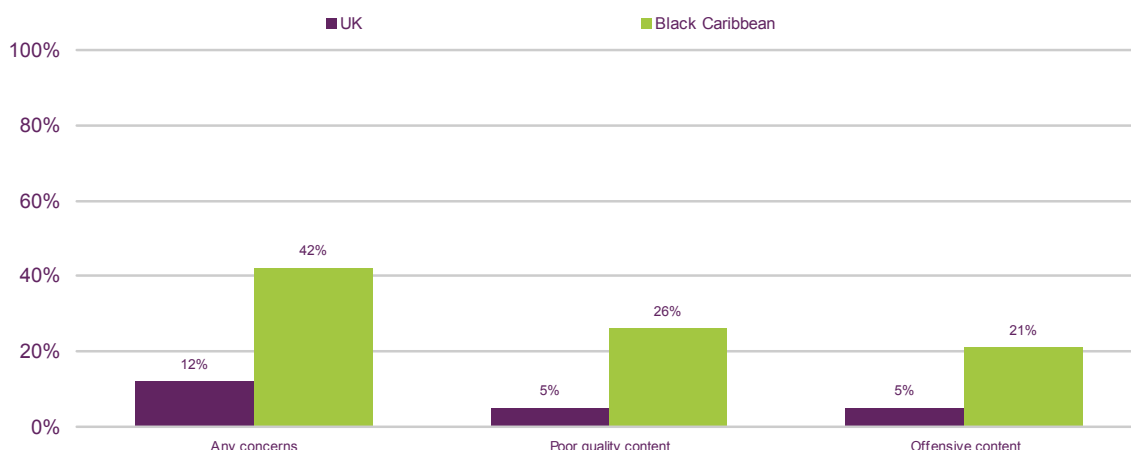
Two in five (42%) Black Caribbean adults have any concerns about what is on the radio. Unprompted responses regarding these concerns have been grouped into two themes:

- poor quality content - responses such as *too many advertising breaks, lack of originality/ programmes are similar, and poor quality programmes*; and
- offensive content - responses such as *bad language, bad taste/ shock tactics and drug references*.

Concerns are broadly equal across each of these themes; 26% mention poor quality content (mainly too many advertising breaks) and 21% mention offensive content (mainly bad language). The two most common unprompted concerns about what is on the radio are bad language (whether spoken or in song lyrics) and too many advertising breaks.

Concerns about radio generally do not differ to any significant extent within the Black Caribbean adult population.

Figure 169: Concerns about what is on the radio

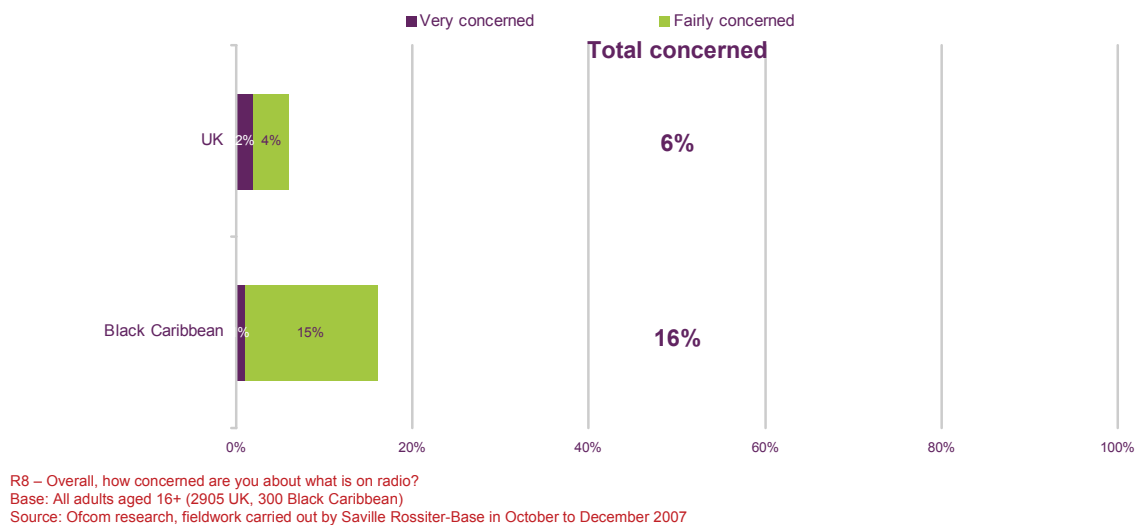


R7 – Can you tell me if you have any concerns about what is on radio? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Mentions of concerns about what is on the radio are much higher among Black Caribbean adults than among UK adults generally (12%). This is despite the earlier finding that Black Caribbean adults are more likely to believe that radio broadcasts are regulated.

When asked to what extent they are concerned about what is on radio, around one in six (16%) Black Caribbean adults say they are either very, or fairly, concerned.

Concern does not vary to any significant extent within the Black Caribbean adult population.

Figure 170: Extent of concern about what is on the radio

While this is a minority view, the extent of concern is higher than among UK adults overall (6%).

Having any concerns about what is on radio, and the extent of concern, are therefore more evident among the Black Caribbean adult population than in the UK adult population overall. As stated earlier, listening to radio at home is more common among Black Caribbean adults and this may be influencing the higher mentions of concerns.

The two most-mentioned concerns about the internet are offensive content and risks to finances / devices

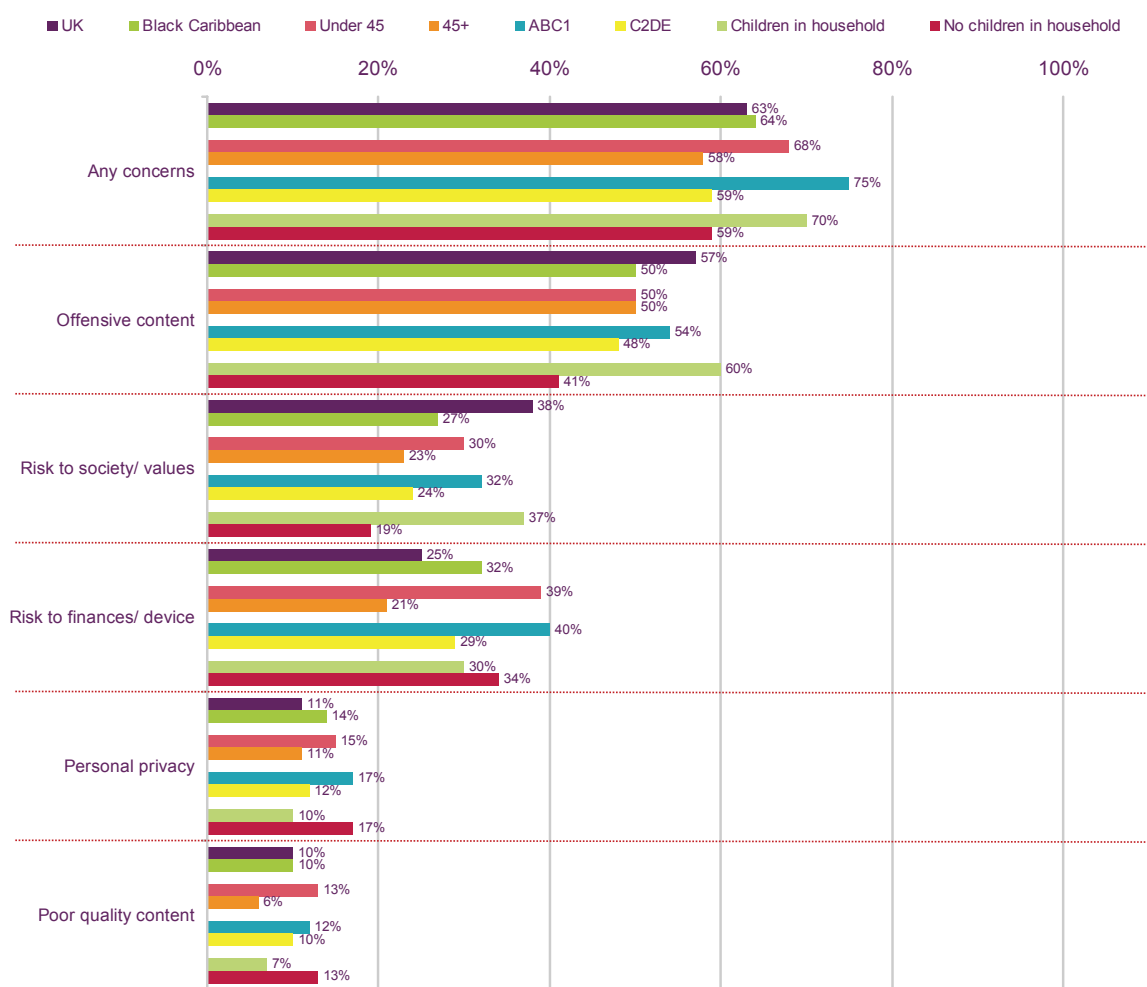
The majority (64%) of Black Caribbean adults have concerns about what is on the internet. Unprompted responses regarding these concerns have been grouped into five themes:

- offensive content - responses such as *sexual content/ pornography, unsuitable for children* and *violent content*;
- risk to society/ values - responses such as *paedophiles/ perverts masquerading as young people online, websites showing abuse of children, websites instructing how to be a terrorist* and *websites instructing how to commit suicide*;
- risk to finances/ device - responses such as *identity fraud/ others getting access to my personal detail, computer viruses/ bugs* and *insecure sites*;
- personal privacy - responses such as *spam/ unwanted emails* and *claims for money/ phishing emails*; and
- poor quality content - responses such as *pop-up adverts*.

Concerns about what is on the internet are dominated by concerns relating to offensive content (50%). The four most common unprompted concerns are: paedophiles online, computer viruses, sexual content/ pornography, and content unsuitable for children.

These concerns are more likely to be mentioned by ABC1s and those with children in the household. Concerns relating to risks to finances/ devices are higher among the under-45s.

Figure 171: Concerns about what is on the internet



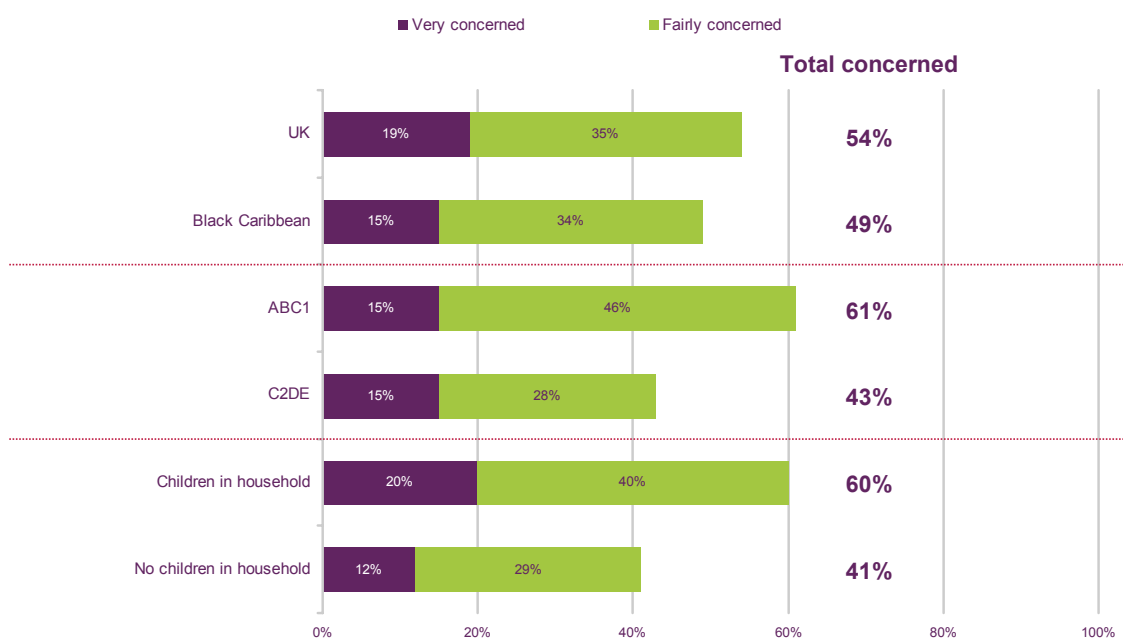
IN36 – Can you tell me if you have any concerns about what is on the internet? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+, 124 Black Caribbean ABC1, 169 Black Caribbean C2DE, 143, 135 Black Caribbean with children in household, 165 Black Caribbean with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While mentions of any concerns about what is on the internet are at a similar level to UK adults overall (63%), Black Caribbean adults are more likely than UK adults in general to mention concerns relating to risks to finances/ devices, and less likely to mention concerns relating to offensive content.

Spontaneous concerns relating to computer viruses (within the theme of risks to finances/ devices) are higher among Black Caribbean adults, and may correspond with the lower use of online shopping.

When asked to what extent they are concerned about what is on the internet, half (49%) of all Black Caribbean adults say they are either very, or fairly, concerned.

The extent of concern about what is on the internet is higher among those in ABC1 households and those with children in the household. This corresponds with higher take-up of the internet among these groups.

Figure 172: Extent of concern about what is on the internet

IN37 – Overall, how concerned are you about what is on the internet?

Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 124 Black Caribbean ABC1, 169 Black Caribbean C2DE, 135 Black Caribbean with children in household, 165 Black Caribbean with no children in household)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The extent of concern about what is on the internet is similar to that found among UK adults in general (54%).

Concerns about mobile phones are driven by concerns about affordability

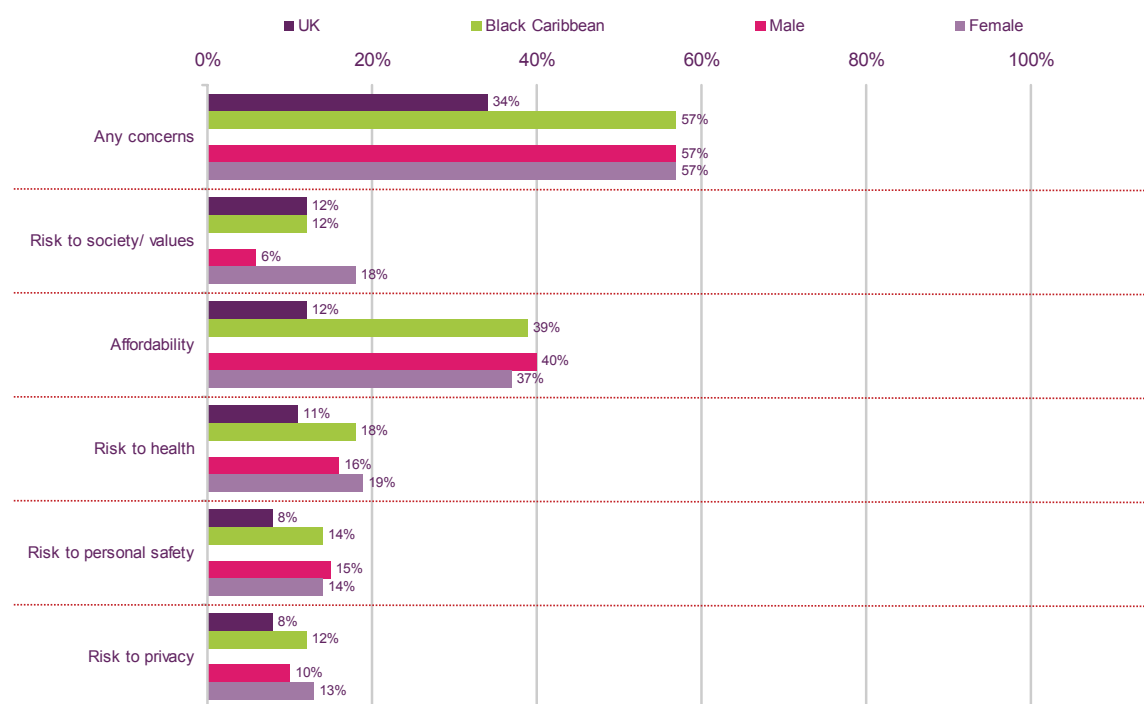
The majority (57%) of Black Caribbean adults have concerns about mobile phones. Unprompted responses regarding these concerns have been grouped into five themes:

- risk to society/ values - responses such as *misuse of camera phones, happy slapping, children having phones at a young age and paedophiles contacting children*;
- affordability - responses such as *cost of calls generally* and *cost of calls when abroad*;
- risk to health - responses such as *health concerns using handset* and *health concerns - masts*;
- risk to personal safety - responses such as *target for theft of mobile phone*; and
- risk to privacy - responses such as *intrusion into other people's space/ public space* and *junk/ spam text messages*.

Concerns are dominated by affordability (39%), followed by risk to health (18%). The four most common unprompted concerns about mobile phones are the cost of calls, being a target for theft of the phone, the cost of calls when abroad, and health concerns connected with using a handset.

At the overall level, there are few differences across the Black Caribbean adult population, but concerns about risk to society/ values are more common among females.

Figure 173: Concerns about mobile phones



M5 – Can you tell me if you have any concerns about mobile phones?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 143 Black Caribbean male, 157 Black Caribbean female)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Concerns relating to mobile phones in general, and those specifically relating to affordability and (to a lesser extent) health risks, are much more common than among UK adults overall.

We do not have any detail on how Black Caribbean adults use their mobile phones, but the younger profile and higher interest and confidence in using interactive functions generally suggest higher volume of use compared to the UK adult population.

When asked to what extent they are concerned about mobile phones, around three in ten (30%) Black Caribbean adults say they are either very, or fairly, concerned, with no real variation across demographic groups.

Figure 174: Extent of concern about mobile phones



M6 – Overall, how concerned are you about mobile phones?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Although a minority view, the extent of concern is higher than among UK adults (23%)

Concerns about gaming are equally likely to be about offensive content as about risks to society and values

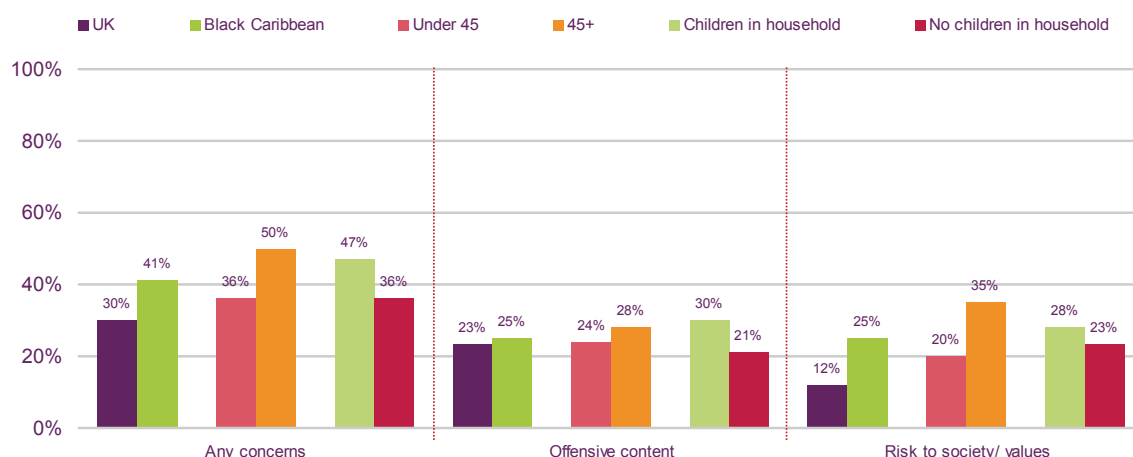
Two in five (41%) Black Caribbean adults have any concerns about gaming. Unprompted responses regarding these concerns have been grouped into two themes:

- offensive content - responses such as *violent content, bad language and sexual content*; and
- risk to society/ values - responses such as *unsuitable for children, encourage children to stay indoors and impact on social skills*.

Concerns are equally split between these two themes. The three most common unprompted concerns about gaming are violent content, discouraging creative play for children and encouraging children to stay indoors.

Concerns about gaming are more likely to be mentioned by adults aged 45 or over, and those with children in the household, and so concern appears to relate to the impact on children, rather than on the respondent.

Figure 175: Concerns about gaming



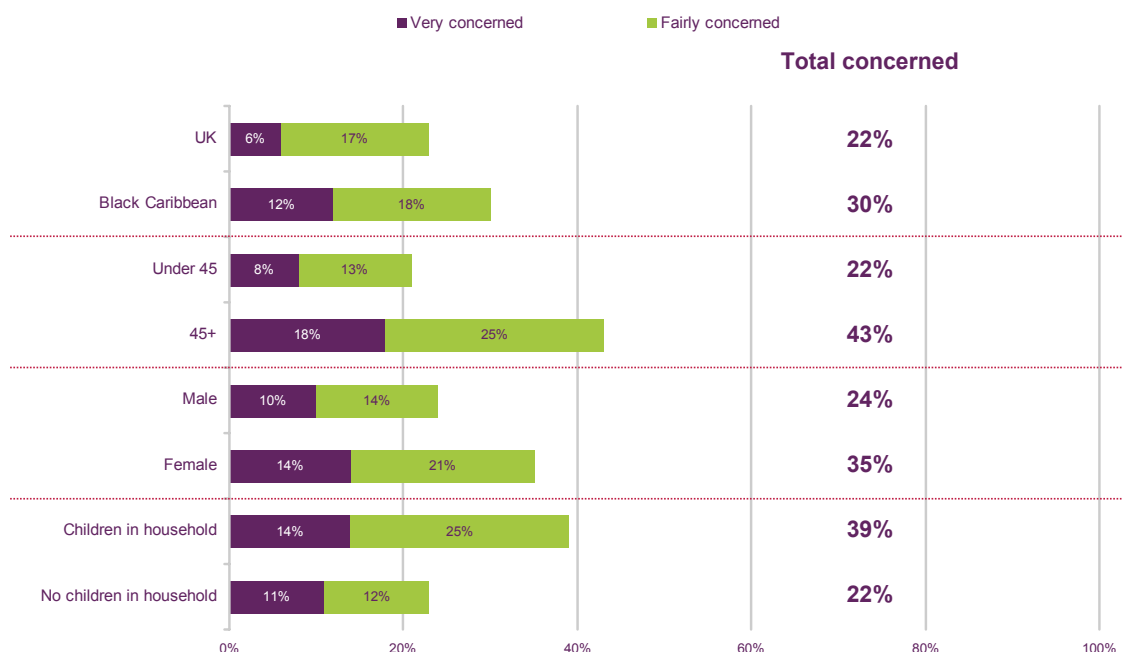
G4 – Can you tell me if you have any concerns about gaming?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+, 135 Black Caribbean with children in household, 165 Black Caribbean with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Concerns about gaming at the overall level, and those relating specifically to the risk to society/ values, are more common than for the general UK adult population.

When asked to what extent they are concerned about gaming, one-third (30%) of Black Caribbean adults say they are either very, or fairly, concerned.

Among Black Caribbean adults, the extent of concern about gaming is higher among those aged 45 and over, females, and those with children in the household.

Figure 176: Extent of concern about gaming



G5 – Overall, how concerned are you about gaming?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+, 143 Black Caribbean male, 157 Black Caribbean female, 135 Black Caribbean with children in household, 165 Black Caribbean with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Although this is a minority view, the extent of concern is higher than among UK adults overall (22%).

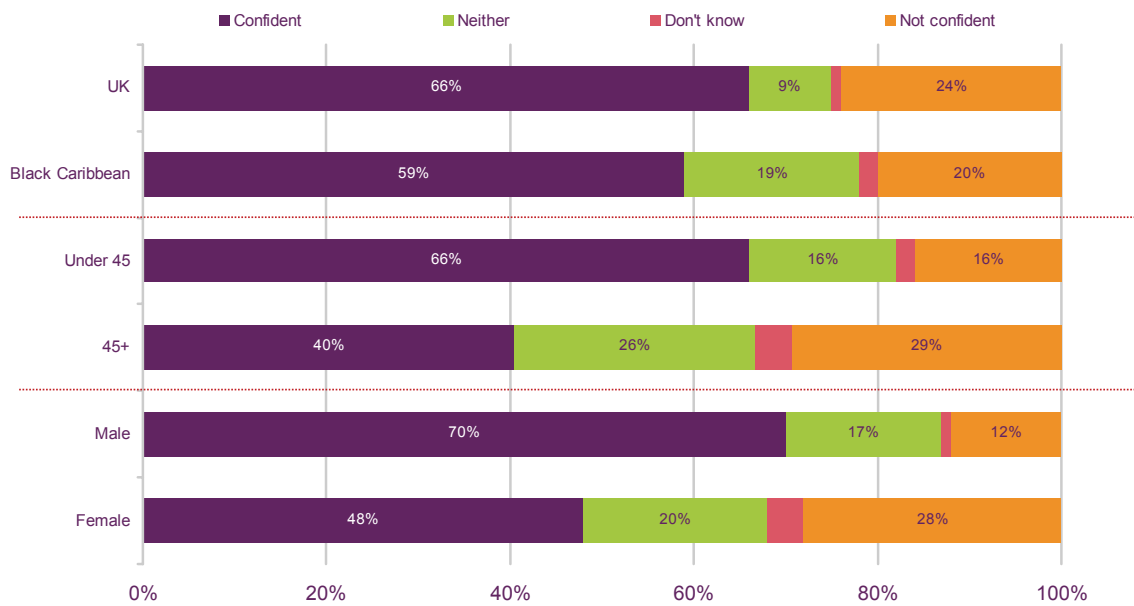
6.4 Create

Most are confident creating content and a small majority have experience with digital creative activities

Three in five (59%) Black Caribbean adults who use the internet say they are confident in using creative elements available through the internet and mobile phones, such as creating blogs, editing and sharing photos online, and uploading videos from a mobile phone.

Confidence is more evident among those in the Black Caribbean adult population who are more likely to use the internet for creative functions; that is, under-45s and males.

Figure 177: Confidence in creating content



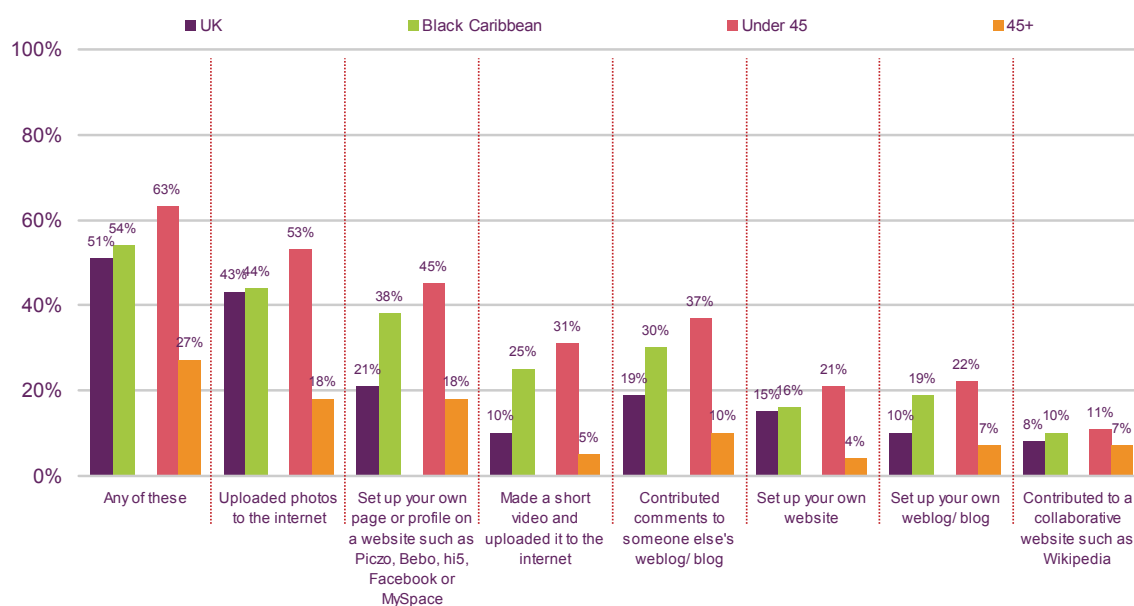
IN10 – How confident are you in using the creative elements that media such as internet and mobile phones offer? This includes creating blogs (or online diaries), editing photos and sharing them with friends and uploading short videos from a mobile phone
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 199 Black Caribbean, 159 Black Caribbean under 45, 59 Black Caribbean 45+, 114 Black Caribbean male, 85 Black Caribbean female) NB LOW BASE SIZE FOR BLACK CARIBBEAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

The degree to which Black Caribbean adults say they are confident or not confident does not vary from UK adults in general, but Black Caribbean adults are more likely to give a neutral (neither confident nor not confident) response. Although still a minority response, this greater degree of neutral response corresponds with the earlier finding relating to confidence in finding content online.

Just over half (54%) of Black Caribbean internet users have ever used the internet for particular creative functions; most commonly, uploading photos to the internet or creating a social networking site profile.

Experience is more common among internet users under 45 and, for particular functions, among males.

Figure 178: Experience of creative activities



IN28A-G – I'd like to read out a number of things people might do using the types of technologies we've been talking about. For each one, could you please tell me if you've done it, or you'd be interested in doing it, or you're not interested in doing it?
 Base: All who use the internet at home or elsewhere (1723 UK, 216 Black Caribbean, 157 Black Caribbean under 45, 59 Black Caribbean 45+) NB LOW BASE SIZE FOR BLACK CARIBBEAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

At the overall level, experience of any of these creative functions among Black Caribbean adults does not differ from UK adults overall who use the internet.

Two in five internet users have a social networking site profile

Two in five (38%) Black Caribbean adult internet users have a social networking site page or profile. Of these, most have a profile on more than one site, with an average of 2.2 profiles.

Within the Black Caribbean adult population, using social networking sites is much more common among adults under 45, with close to half (45%) of internet users having a page or profile.

At the overall level, having a social networking site profile is more common than among the UK adult population in general who use the internet (20%). Having a profile is also more common among Black Caribbean internet users under 45 (45%) than among UK adults under 45 (27%).

The base size for social networking site users among Black Caribbean adults is low, and so further details on users are indicative only. It appears that Black Caribbean social networking site users are more likely than UK users to:

- have a profile on Facebook, MySpace, hi5 or Piczo;
- use social networking sites more frequently;
- have a profile that can be seen by anyone; and
- use the sites to talk to people they don't know.

6.5 Learning

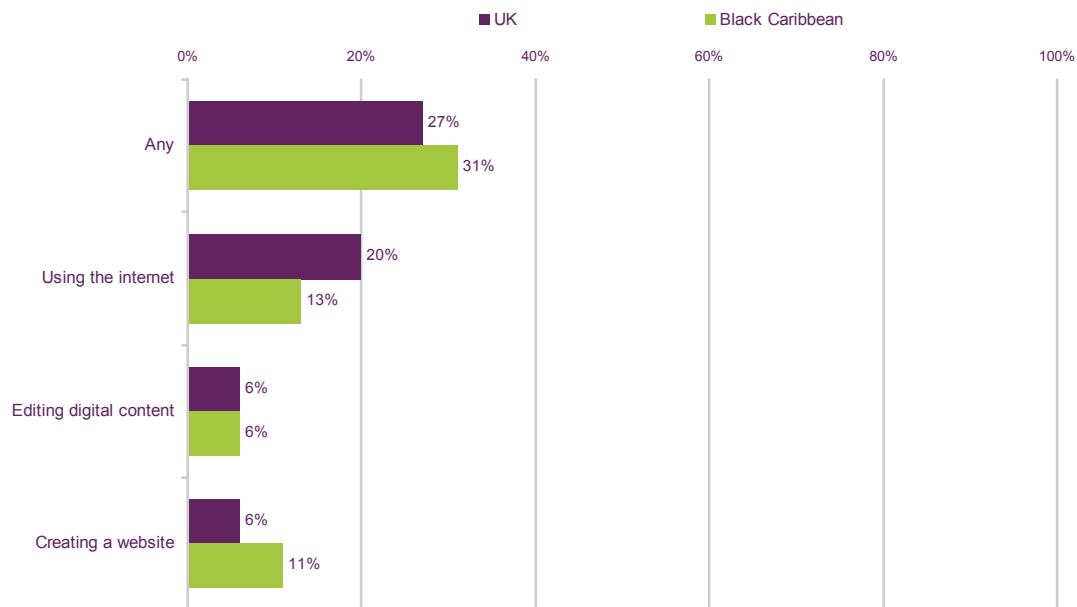
One in three have experience of formal teaching of digital technology

Around one in three (31%) Black Caribbean adults have experience of formal teaching of digital technology, through classes or another type of training.

This teaching is most commonly concerned with using the internet, but a significant minority have also had experience of learning how to create a website or edit digital content.

As might be expected, experience of learning about digital technologies is higher among Black Caribbean adults under 45 (at 39% compared with 18% of those aged 45 and over).

Figure 179: Experience of learning about digital technology



Z9 – Thinking about the types of things you might learn about TV, the internet, mobile phones and so on... Can you tell me which, if any, of these have you learned more about through classes or any other type of training?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean) Shows responses from 5% or more of all Black Caribbean adults
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

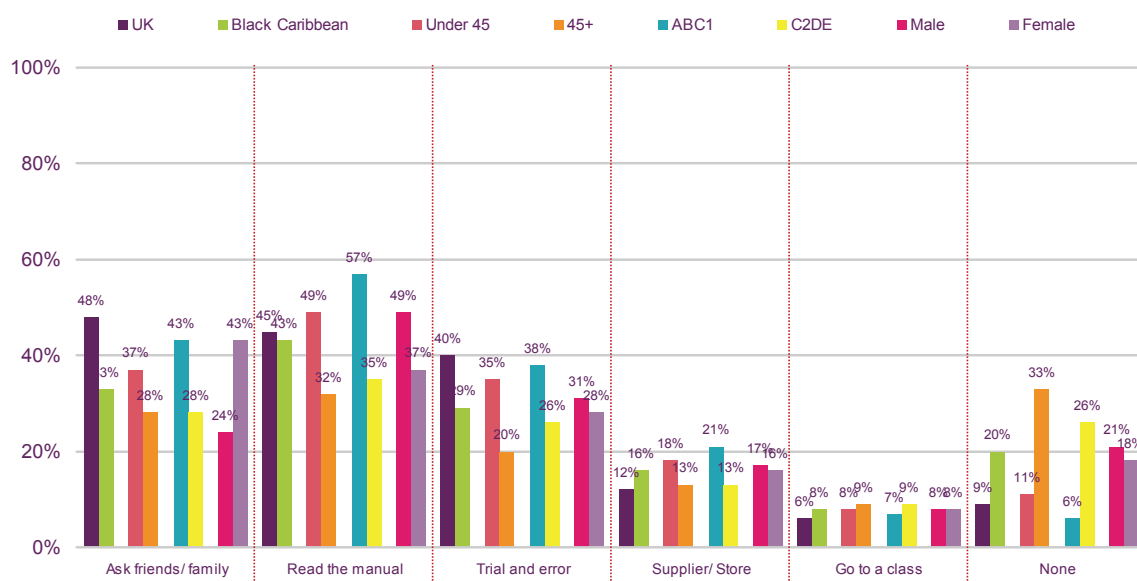
Experience of formal teaching of digital technology is at a similar level to that found in the UK adult population generally (27%), and also similar among under-45 year old adults.

Most have a preference for informal learning

The most preferred options for learning about digital technology are through reading manuals or instructions, through friends and family, and through trial and error. One in five (20%) do not express any preference for learning.

There are some clear differences by socio-economic group within the Black Caribbean adult population; with those in ABC1 socio-economic groups more likely to prefer to learn through friends and family or through reading the manual. Those in C2DE socio-economic groups are more likely than the UK average to say they would not prefer any of these ways of learning about digital technology. This response is also more evident among over-44s.

Figure 180: Preference for learning about digital technology



Z8 – We have discussed digital television and radio, the internet and mobile phones. Please tell me which of these are ways you prefer to learn about using such services?
 Base: All adults aged 16+ (2905 UK, 300 Black Caribbean, 182 Black Caribbean under 45, 118 Black Caribbean 45+, 124 Black Caribbean ABC1, 169 Black Caribbean C2DE, 143 Black Caribbean male, 157 Black Caribbean female)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

At the overall level, compared to the UK adult population overall, Black Caribbean adults are less likely to prefer to ask friends or family, or to learn through trial and error.

Although only a minority of Black Caribbean adults (20%) say they do not have a preferred way to learn, this is more common than among UK adults in general (9%).

Section 7

Black African adults

7.1 Summary

The demographic profile of the Black African population differs from the UK average population and from the other EMGs in this report across a number of variables:

- The Black African community has the youngest profile of all the EMGs; 83% of Black African adults are aged 16-44 years, compared with 52% of the total UK population.
- Black African adults are less likely to live in an ABC1 household than either the UK population as a whole or Indian adults, but are more likely to be in an ABC1 household than either Black Caribbean or Pakistani adults.
- They are, however, the group most likely to be working; 66% report that they are in full-time employment and an additional 11% are working part time.
- They are the group with the second largest average household size (4.1) but the second lowest average number of children (2.1).

It should be noted that the age profile of those who do *not* have children in the household differs between Black African adults and the UK population as a whole. In the Black African population, those without children tend to be younger (pre-family) whereas households without children in the UK general population tend to be older (post-family). So in Black African households without children, media literacy attitudes and behaviours tend to reflect those of younger people, whereas in UK households without children, media literacy attitudes and behaviours more closely reflect those of retired people.

Access

Table 10: Key access measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
**Multiple platform ownership	62%	65%	55%	62%	53%
Digital TV ownership	83%	89%	81%	82%	82%
Mobile phone take-up	90%	91%	88%	95%	85%
Internet take-up	76%	72%	64%	69%	62%
*Willingness to get internet	25%	35%	30%	30%	15%

** Home ownership of digital television, internet and mobile phone

* Base: All adults who do not have the internet at home

Three in five Black African adults live in households which have multimedia devices (defined as having digital television *and* the internet *and* a mobile phone). This figure is significantly higher than the UK average (53%). Those who are more likely to live in a household with all three of the devices are adults aged under 45, ABC1s and those with children in the household.

Digital television ownership levels are similar to those of the UK population as a whole, although, as with each of the three other EMGs in this report, Black Africans are more likely to receive their service through a cable or satellite subscription (particularly cable). This is perhaps not surprising, as cable and satellite services give greater access to international channels rather than just UK-based ones²².

The vast majority of Black Africans personally use a mobile phone, and this is most common among under-45s and ABC1s. Black Africans have the highest level of mobile phone take-up of all the EMGs included in this report. Personal ownership of a mobile phone is also significantly higher than the UK average.

Black African adults are more likely to live in a household that has the internet (69%) than the general UK population (62%). Internet take-up is likely to continue, with around one third of Black African adults who do not currently have the internet at home saying they are likely to get it in the next 12 months. This compares to 15% among the UK population in general.

Despite having higher take-up of the internet and mobile phones, Black Africans appear to regularly participate in fewer media activities. This is primarily a result of their lower levels of participation in traditional media activities such as reading newspapers, watching videos and listening to music on stereos.

Black Africans are more likely than average to say they would most miss using their mobile phone, of all media devices. While this is unsurprising for a group with a younger population profile, television has a lower level of importance in the Black African adult population than in any of the groups we looked at.

In an average week Black Africans spend 11.2 hours online, which is broadly similar to the 12.1 hours spent online across the UK average. However, Black Africans carry out fewer activities online than the average for UK adults, including the most-mentioned activities: communicating and looking for work or studies information.

In contrast, and like the other EMGs, a higher proportion of Black Africans use the internet to listen to or download music, and to watch and download video clips or longer films.

Reflecting the younger profile of Black Africans, they are more likely to use another media device while watching television or using the internet. The most-mentioned activity is talking on the phone.

Understand

The table below summarises the percentage of owners or users who expressed interest in any of the various functions we assessed for each platform. The second half of the table shows the proportion of adults who say they have concerns about the media covered in this report.

²² See Ofcom research report *New News, Future News* published 26 June 2007
<http://www.ofcom.org.uk/research/tv/reports/newnews/>

Table 11: Key understand measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
Interest in...					
digital TV functions	77%	79%	85%	91%	67%
digital radio functions	68%	72%	77%	78%	61%
internet functions	100%	98%	98%	100%	97%
mobile functions	98%	95%	98%	97%	94%
Concerns					
TV	65%	73%	73%	60%	55%
Radio	35%	34%	42%	32%	12%
Internet	65%	69%	64%	65%	63%
Mobile	57%	57%	57%	48%	34%
Gaming	37%	46%	41%	38%	30%

Interest in using interactive functions on digital television is higher than the average for UK adults. At the same time there is also a need for greater confidence in carrying out some of the tasks. Black African radio listeners are also more likely to express interest in DAB radio functions.

Although all online adults have a relatively high interest in computer and internet functions, some functions are of more interest to Black Africans than to the general population: using email, banking online, listening to the radio and joining in debates through posting comments online.

Four in five Black Africans are confident that they can find the information they are looking for online, although this is significantly lower than the average for UK adults. Those who are more confident are the under-45s and ABC1s.

The majority of people are aware how BBC television and commercial television stations are funded, and over half are aware of how radio stations are funded. In comparison, two in five are aware of how the BBC website and search engines are funded. Awareness of how search engines are funded is higher than among UK adults overall.

Two in three are aware that television programmes are regulated and a similar proportion know that the watershed starts at 9pm. This is lower than awareness across the U where four in five are aware of television regulation and the watershed.

Black African adults are also more likely than adults in the UK in general to say that internet and mobile phone content is regulated.

When using new websites, over four in five Black African internet users make some sort of check, such as assessing the overall look and feel of the site or checking how up to date the information is. They also make judgments about the security of a website before entering their details; relying on personal instinct, looking for professional signs or using peer signs. Furthermore, when providing personal information online, Black Africans are more likely to say they are happy about providing these details than others.

Black Africans are more likely to spontaneously mention a concern about what is on television or on the radio, as well as expressing concern about mobile phones and electronic games.

Concerns about the television are influenced by perceptions of offensive content, and concerns about mobiles are influenced by concerns about affordability. Their concerns about the internet are at a similar level to the UK in general.

Create

We have measured people’s participation in creative activities by asking internet users how confident they feel about using creative functions online and also whether they have any experience or interest in creating online content. The creative activities we assessed were: *experience* of downloading different types of programming and audio content and *interest* in activities such as uploading photos, creating a social networking profile, contributing to blogs and creating videos that are later uploaded.

Table 12: Key create measures

	Indian adults	Pakistani adults	Black Caribbean adults	Black African adults	UK total adults
Confidence in creating content	62%	64%	59%	62%	66%

Three in five are confident about creating content, broadly similar to the average for UK adults. Furthermore, participation in creative activities is comparable, although Black Africans are more likely to have a social networking profile, to have made a short video and uploaded it to the internet, or to have contributed comments to a weblog or blog.

One quarter have experienced teaching about the media, with using the internet being the most likely topic. The ways Black Africans prefer to learn differs from the UK population in general, with Black Africans significantly less likely to say they prefer to learn from friends and family. They tend to prefer learning by reading a manual or through trial and error.

7.2 Access

This section looks at take-up of digital television, internet and mobile phones, non-internet users' intentions to get the internet, what people use the internet for, the regular media activities of adults and the media activity that they would miss the most, the extent to which other media devices are used at the same time as watching television or using the internet, and people's main reasons for using media devices.

We make comparisons between the Black African adults surveyed in the Ofcom Ethnic Minority Groups Media Literacy Audit and a representative sample of UK adults surveyed in the Ofcom Adult Media Literacy Audit.

In most figures, data are shown for the total adult UK population and for the adult Black African population within the UK. The demographic breakdown (age, socio-economic group, gender and presence of children) is for the Black African adult population.

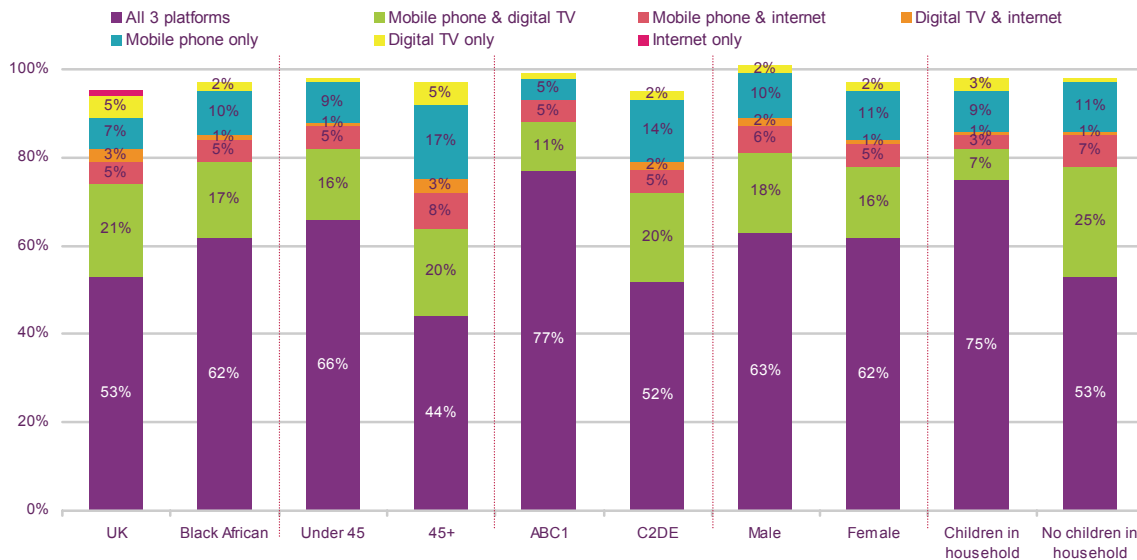
Three in five Black African adults live in households with digital television, mobiles phones and the internet

Figure 181 illustrates the proportion of households that have digital television, the internet and mobile phones.

Over four in five (85%) households have more than one core digital device (digital television, the internet, mobile phone), and three in five (62%) have all three media devices.

Ownership of all three devices is more common among under-45s, those in ABC1 socio-economic groups, and those with children in the household. Ownership of platforms does not vary to any significant extent by gender.

Figure 181: Multiple platform ownership: digital television, mobile phone and the internet



T1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5? Does anyone in your household have access to the internet at home through a computer or laptop? Do you personally use a mobile phone?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 147 Black African male, 153 Black African female, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The percentage of households with more than one core media device is broadly similar to the UK adult population (85% compared with 82%), but ownership of all three media devices is more common than for UK adults overall (62% compared with 53%).

Because of this relatively high level of multiple platform ownership, few adults say they own only one of the three or none of them; just 3% of Black African adults and 9% of the UK adult population say they do not own any of the devices.

Four in five have digital television in the household

Four in five (82%) Black African adults have digital television at home. Ownership is higher among adults aged under 45 and those in ABC1 socio-economic groups. Digital television ownership does not vary to any significant extent by gender or by the presence of children in the household.

Figure 182: Home ownership of digital television



T1 - Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 147 Black African male, 153 Black African female, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Ownership of digital television, both at the overall level and among adults under 45, does not differ from the UK adult population in general.

There are, however, differences in how digital television is received. Two-thirds (65%) of Black Africans say they receive their television service through a satellite or cable service compared with just over half (56%) of UK adults. The higher level of take-up of pay television is matched by a lower take-up of Freeview compared to UK adults (19% compared to 30% of all UK adults). The higher level of take-up of pay television among the Black African population is likely to be driven by choice of, and access to, a broader range of international and specialist channels. These findings are consistent with other research conducted by Ofcom²³.

²³ New news, future news. A discussion document published 26 June 2007
<http://www.ofcom.org.uk/research/tv/reports/newnews/newnews.pdf>

Over nine in ten use a mobile phone

Almost all (95%) Black African adults personally use a mobile phone.

Although mobile phone use is widespread, it is more common among adults aged under 45 and those in ABC1 socio-economic groups.

Figure 183: Take-up of mobile phone



M1 – Do you personally use a mobile phone?

Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 147 Black African male, 153 Black African female, 127 Black African with children in household, 173 Black African with no children in household)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

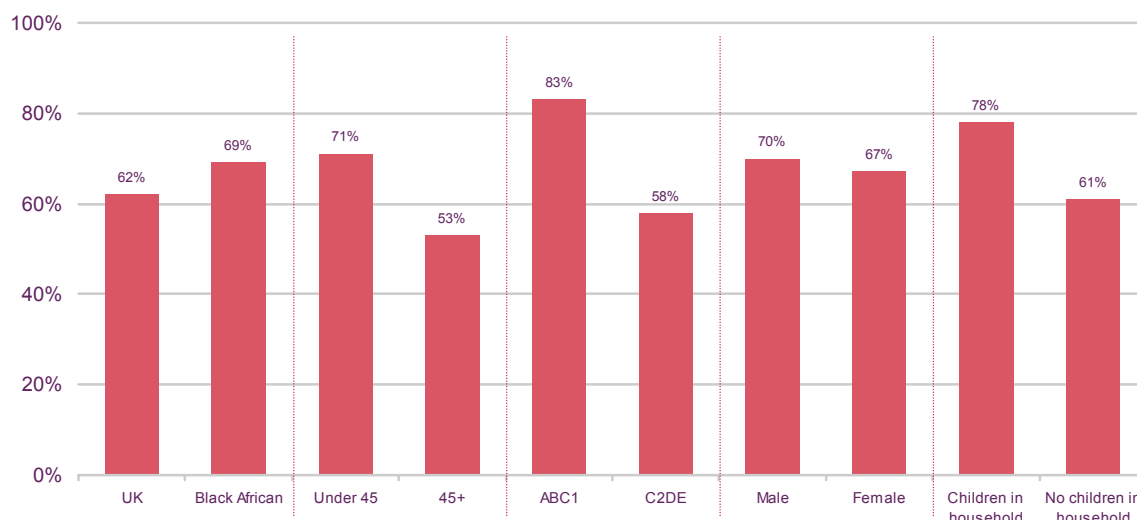
Personal ownership of a mobile phone is higher than for the general UK adult population (85%). The higher level of take-up by Black Africans is likely to be influenced by the younger profile of this population, as take-up among adults under 45 is at the same level for Black Africans and UK adults overall (both 96%).

Two-thirds live in a household that has the internet

Over two-thirds (69%) of Black African adults have the internet at home, although this varies across the Black African population. Take-up of the internet is higher among adults aged under 45, ABC1s and those with children in the household.

Four in five (82%) Black African adults with the internet at home have a broadband connection; this appears to be more common for those in ABC1 socio-economic groups. This difference in take-up of broadband is, however, due to a higher incidence of those in C2DE households who are unsure which type of internet connection they have.

Figure 184: Home access to the internet



IN1 – Does anyone in your household have access to the internet at home through a computer or laptop?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 147 Black African male, 153 Black African female, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Having an internet connection at home is significantly higher than the 62% for the UK population as a whole. The higher level of take-up is influenced by a younger population profile, as take-up of the internet among adults aged under 45 is at a similar level for Black African adults (71%) and UK adults overall (74%).

Take-up of broadband among households with the internet appears to be lower than the UK measure (92%), but this could be a result of the 7% of all Black African adults with the internet at home who are unsure what type of connection they have.

Take-up of the internet should continue to be higher than the UK level over the next 12 months

Three in ten (31%) of Black African adults do not have the internet at home, and this is more common among:

- Over-44s (47%);
- C2DE socio-economic groups (42%); and
- those without children in the household (39%).

The base size for those without internet access at home among Black African adults is relatively low, and so the data in Figure 185 are indicative only.

Those who do not currently have access to the internet at home were asked whether they intended to get access within the next year. Three in ten (30%) who do not currently have the internet at home say they will get it in the next 12 months, while around one in five are unsure about their future intentions.

As a result of a lower proportion saying they do not intend to get the internet, fewer Black Africans were asked why this was so. The responses from those who were asked have been

categorised as either voluntary (not interested/ no need) or involuntary (too expensive/ do not know how to use it/ do not have a computer/ too difficult to use).

Broadly speaking, Black Africans are as likely to give a voluntary reason as they are to give an involuntary one for not intending to get the internet.

Figure 185: Intention to get the internet at home



IN18/ IN20 – Can you tell me if you intend to get internet access at home in the next year or so?/ And can you tell me why that is?
 Base: All adults aged 16+ who do not have internet access at home (1222 UK, 98 Black African) NB SMALL BASE SIZE FOR BLACK AFRICAN
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

Three in ten Black African adults say they intend to get the internet in the next 12 months, compared with 15% of UK adults. As this percentage is higher than the average for UK adults, we expect the higher level of take-up to further increase beyond the overall UK level. Similar proportions in each population have not made up their mind, or are unsure whether they will get the internet.

Among those who do not intend to get the internet in the next 12 months, Black Africans are as likely to give involuntary as voluntary reasons for this. In comparison, UK adults are more likely to give voluntary reasons.

Watching television is the most commonly mentioned media activity

Respondents were asked to select from a list of nine media activities to say which they do almost every day. Figure 186 shows which media activities people are doing regularly.

Black Africans regularly participate in a variety of media activities. The top three most mentioned are watching television, using a mobile phone and listening to the radio.

Regular use of less traditional media such as mobile phones, the internet and MP3 players is more common among adults under 45. However, the breadth of media activities does not differ to any great extent across the age groups, because over-44s are more likely to make regular use of more traditional media such as newspapers and radio.

Compared to the Black African adult population as a whole, no particular group stands out as having a broader range of media activities.

Figure 186: Regular media activities

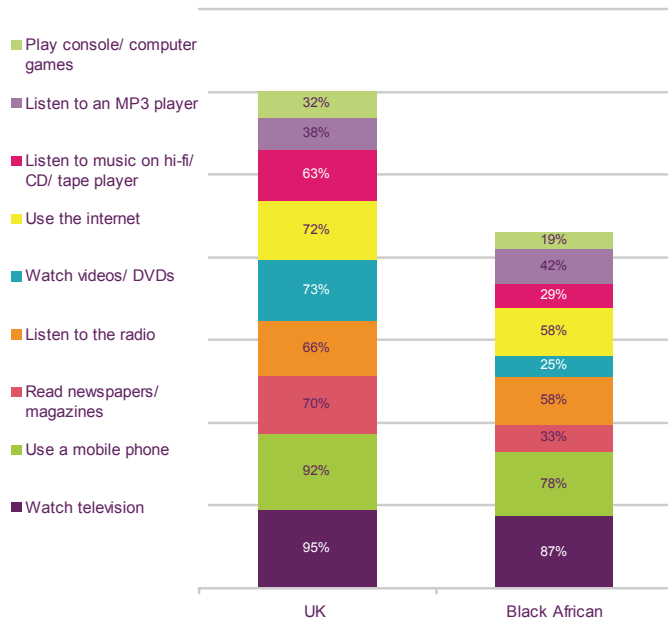


A1 – Which of the following do you regularly do?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 147 Black African male, 153 Black African female, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

A higher proportion of Black African adults than UK adults regularly listen to an MP3 player. In contrast, UK adults are more likely to say they regularly use the more traditional media of television, newspapers or magazines, videos or DVDs, and listen to music on a hi-fi/ CD or tape player. Responses relating to using a mobile phone do not differ to any significant extent. The lower proportion using traditional media influences the apparently lower participation levels in regular media activities.

Considering that the Black African adult population has a younger profile compared to the UK overall, we might expect greater use of media activities. However, when we compare under-45s with the same age group in the UK in general, use of media activities is consistently lower, particularly among traditional media such as reading newspapers and watching videos/ DVDs (see Figure 187). This supports the earlier statement that the apparently lower media consumption is due to lower use of traditional media.

Figure 187: Regular media activities among adults aged under 45



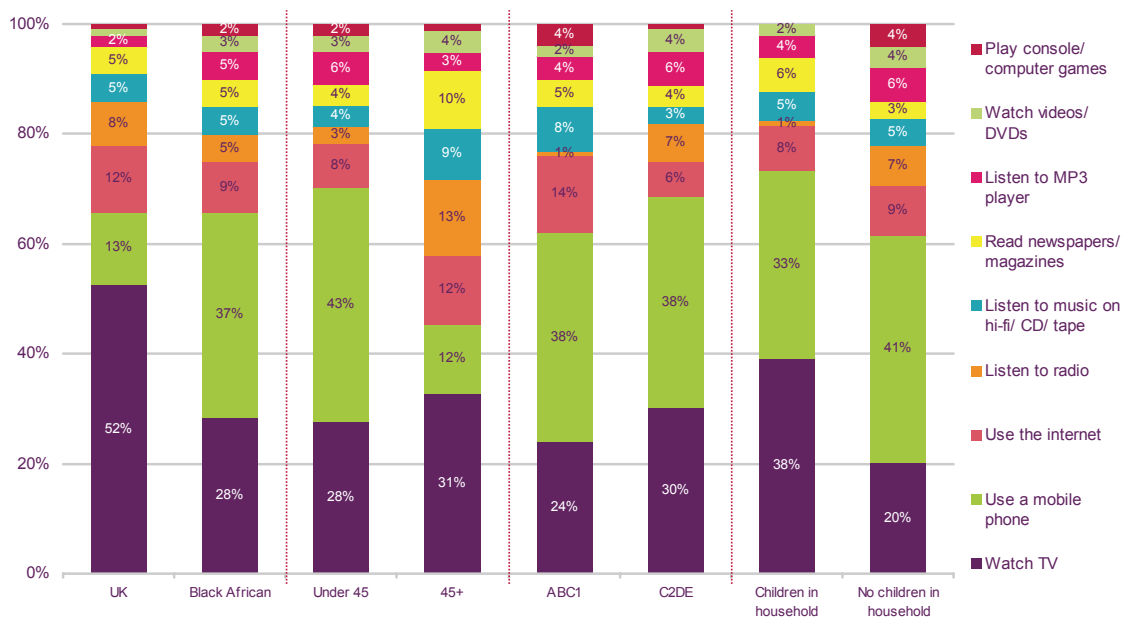
A1 – Which of the following do you regularly do?
 Base: All adults aged 16 to 44 (1547 UK, 190 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Mobile phones have the most mentions as the most-missed media activity

Having established which media activities people regularly do, we then asked which one of these they would miss doing the most, as shown in Figure 188. Using a mobile phone is the activity most frequently mentioned by Black African adults, with watching television the second most mentioned activity.

The breakdown of media activities people say they miss the most is reflective of the younger age profile of the Black African adult population, and adults under 45 are much more likely to say they would miss using a mobile phone the most.

Figure 188: Most-missed media activity



A2 – Which one of these would you miss doing the most?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Mentions of mobile phone as the most-missed media activity are much higher than among UK adults overall (13%). So while Black Africans are equally as likely as UK adults to say using a mobile phone is a regular activity, they are more likely to say this is the activity they would miss the most.

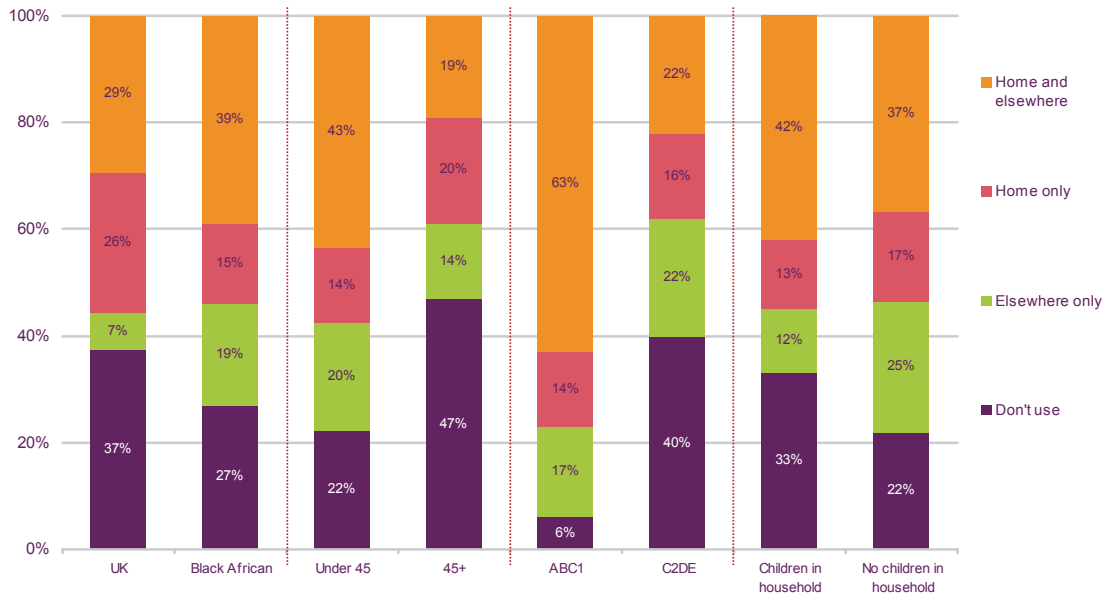
Higher mentions of mobile phones are matched by lower mentions for television as the most-missed media activity, compared to responses from UK adults. Whereas females in the UK adult population are more likely to say they would miss television the most, this gender difference is not evident in the Black African adult population.

Three in four use the internet at home or elsewhere

Three in four (73%) Black African adults use the internet, with over half of these (54%) using the internet at home and around three in five (58%) using it elsewhere. The majority of this use outside the home is accounted for by use in the workplace.

Use of the internet is more common for Black African adults aged under 45, those in ABC1 socio-economic groups and those without children in the household, but does not vary by gender.

Figure 189: Where the internet is used



IN1/ IN5 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

The percentage of people who use the internet is higher than the measure of 63% for the general UK adult population. This difference is accounted for by higher use outside the home; whether in addition to, or instead of, use in the home. Three in five (58%) Black African adults use the internet outside the home, compared to around one in three (36%) UK adults overall.

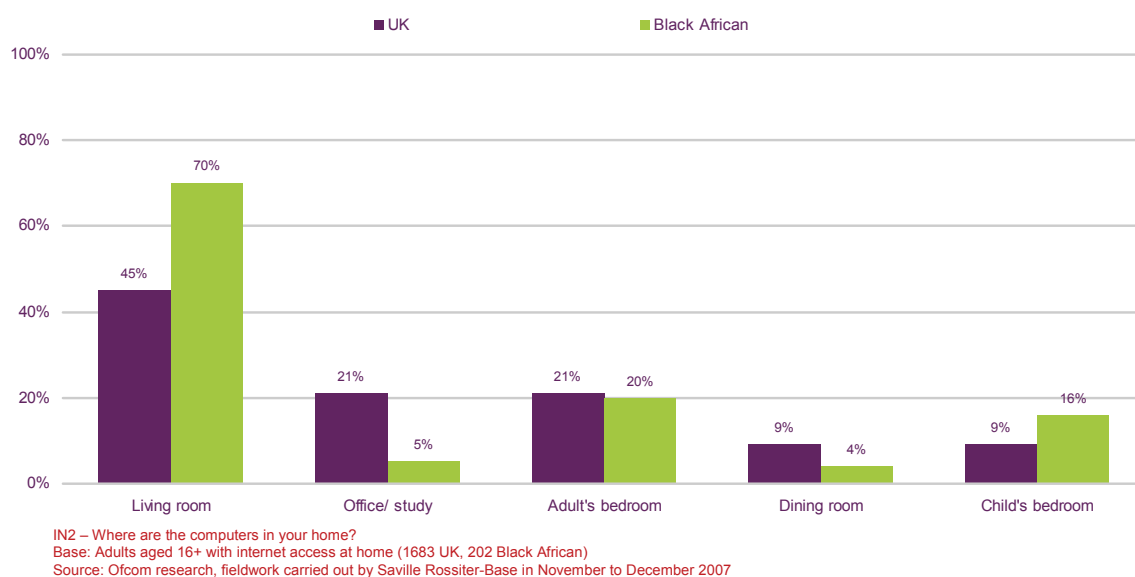
Among adults under 45, while a similar proportion of Black African adults use the internet compared to UK adults (78% compared with 79% for UK overall), use outside the home is higher (63% compared with 50%), and fewer use the internet in the home (57% compared with 70%).

Home access to the internet is most commonly in the living room or a bedroom

The most common location for the home computer with internet access is the living room, followed by an adult’s or a child’s bedroom.

Most households (78%) have computers with internet access in just one room, with the remainder (22%) having access in more than one room.

Figure 190: Location of home computer with internet access



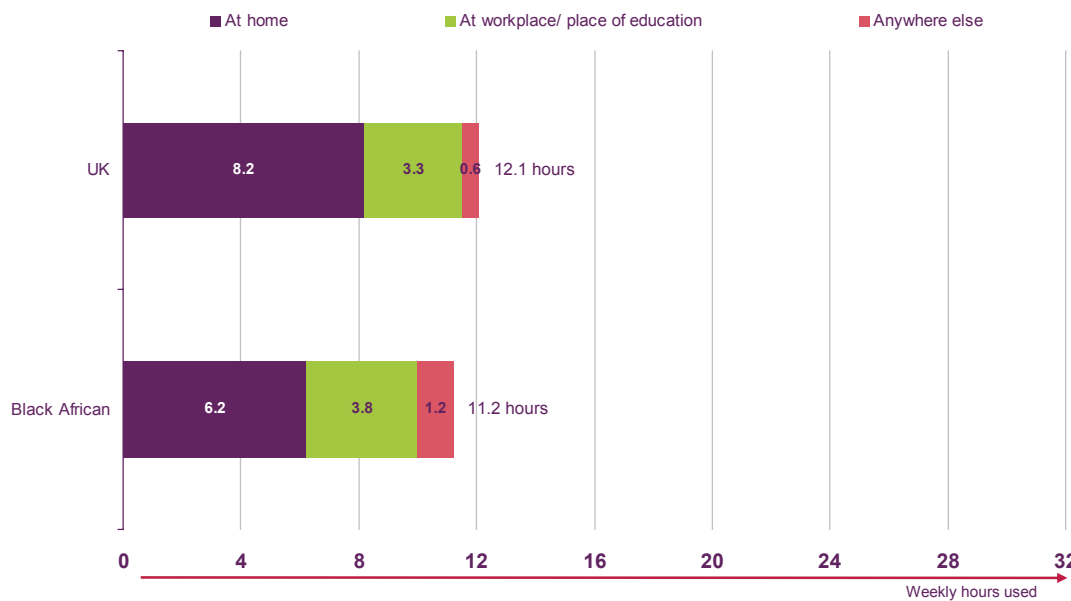
While UK adults are more likely to access the internet in the living room than in any other room, Black African adults are more likely to have access in the living room as well as in a child's bedroom in the home, and less likely than UK adults to have access in an office/ study or the dining room.

Although only a minority (22%) have access in more than one room in the home, this is more common than for UK adults overall (16%).

Around half of time spent online is in the home

Black Africans use the internet on average for 11.2 hours per week, and around half of this time is spent being online at home (6.2 hours).

Volume of use across the different demographic groups for Black African adults does not vary to any significant extent.

Figure 191: Volume of internet use per week

IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else?
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 218 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

The average weekly volume of use is broadly similar to the average for UK adults in general (12.1 hours). Within this, however, volume of use at home is lower compared with UK adults (8.2 hours) as Black African internet users spend more time online outside the home.

The top three activities online are communication, finding information for work or studies, and creativity

All adults who use the internet were prompted with a list of 18 possible uses of the internet and were asked to say, for each one, whether this was something they did, and how often.

The 18 possible uses have been grouped into eight types, in order to assess 'breadth of use' of the internet; the extent to which they use the internet for a variety of purposes:

- communication - uses such as sending or receiving email or using online chat rooms or instant messaging (IM);
- work/ studies information - finding information online for work or for studies;
- transactions - banking or paying bills, using auction sites or buying things online;
- news - looking at news websites;
- creativity - using social networking sites (such as MySpace, Bebo, and Facebook) or maintaining a website or weblog;
- entertainment - listening to radio or playing games online or looking at adult-only websites;
- leisure information - finding information for leisure time including cinema and live music or information for booking a holiday; and

- public/ civic - finding out about public services or looking at political/ campaign/ issues websites.

Figure 192 shows the proportion of internet users who use the internet for each of these activities at least once a week. The average number of the original 18 possible uses is also shown.

The three main uses of the internet are communication, finding work/ studies information, and creativity (mostly using social networking sites). Communication is the only use that is made of the internet by the majority of users at least weekly.

Within the Black African adult population, a broader use of the internet is evident for adults under 45 and those without children in the household. Breadth of use of the internet does not vary to any significant extent by gender or socio-economic group.

Figure 192: Internet activities carried out at least once a week



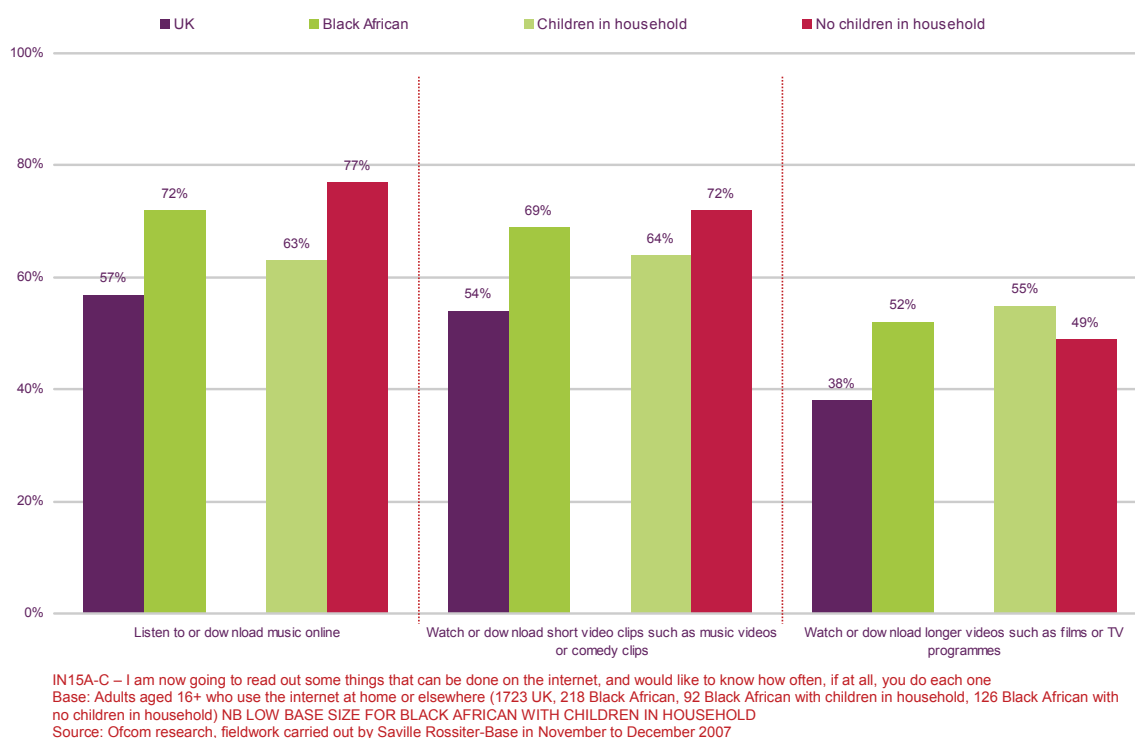
With the exception of creative and entertainment uses, fewer Black African adults who are online carry out the activities shown in Figure 192 above, than the UK online population.

The majority of users download or watch entertainment content online

The majority of internet users watch entertainment content online or download this content. Around three in four listen to or download music, around two in three watch or download video clips, and around half watch or download longer video content.

Using the internet to access entertainment content is generally more common among those without children in the household, who tend to be under 45. However, Figure 193 shows that this difference is not evident for longer videos such as films or television programmes.

Figure 193: Using the internet to watch or download video content



Accessing entertainment content is more common, in each case, than for UK adults in general, with a similar ‘gap’ between the two populations for each type of content.

With the exception of downloading longer videos, internet users aged under 45 in the Black African adult population are more likely to use the internet in this way, compared to those in the general UK adult population.

The higher level of accessing entertainment content is influenced by the younger population profile; findings are at a similar level, in each case, for Black African adults aged under 45 and adults the same age in the general UK population.

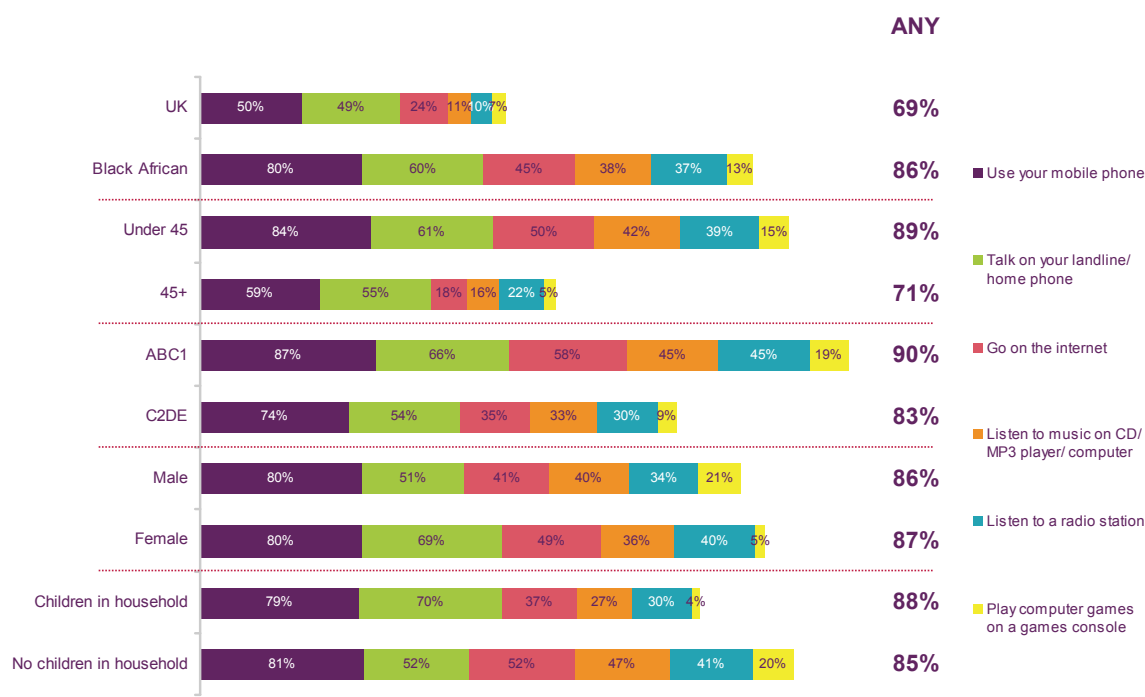
Most people use another media device while watching television

We asked people if they ever use another media device while they are watching the television or using the internet.

Over eight in ten (86%) Black African adults ever use other media while watching television. The other media devices people are most likely to use while watching television are a mobile or landline phone.

Using another media device while watching television tends to be higher among under-45s, as with each of the other EMGs we have assessed in this report. Using another media device while watching television is also more common among those in ABC1 socio-economic groups and those without children in the household, but does not differ to any significant extent at the overall level by gender.

Figure 194: Using another device while watching television



T3A-F – Do you ever watch TV at home and do these other things at the same time? Is that most times or sometimes when you watch TV?
 Base: All adults aged 16+ with a TV in the household (2887 UK, 285 Black African, 187 Black African under 45, 98 Black African 45+, 140 Black African ABC1, 137 Black African C2DE, 142 Black African male, 143 Black African female, 122 Black African with children in household, 163 Black African with no children in household) NB LOW BASE SIZE FOR BLACK AFRICAN AGED 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Using more than one media device while watching television is more common than among UK adults overall (69%). However, this is not just due to the younger population; Black Africans aged under 45 are more likely to use another media device while watching television than under-45s in the UK general population (89% compared with 83%).

Other research conducted by Ofcom²⁴ showed that Black African adults are more likely than UK adults generally to have a single television set in the household rather than multiple sets (66% compared with 30%). Having one television set in the household may have an impact on their use of other media devices at the same time as watching television.

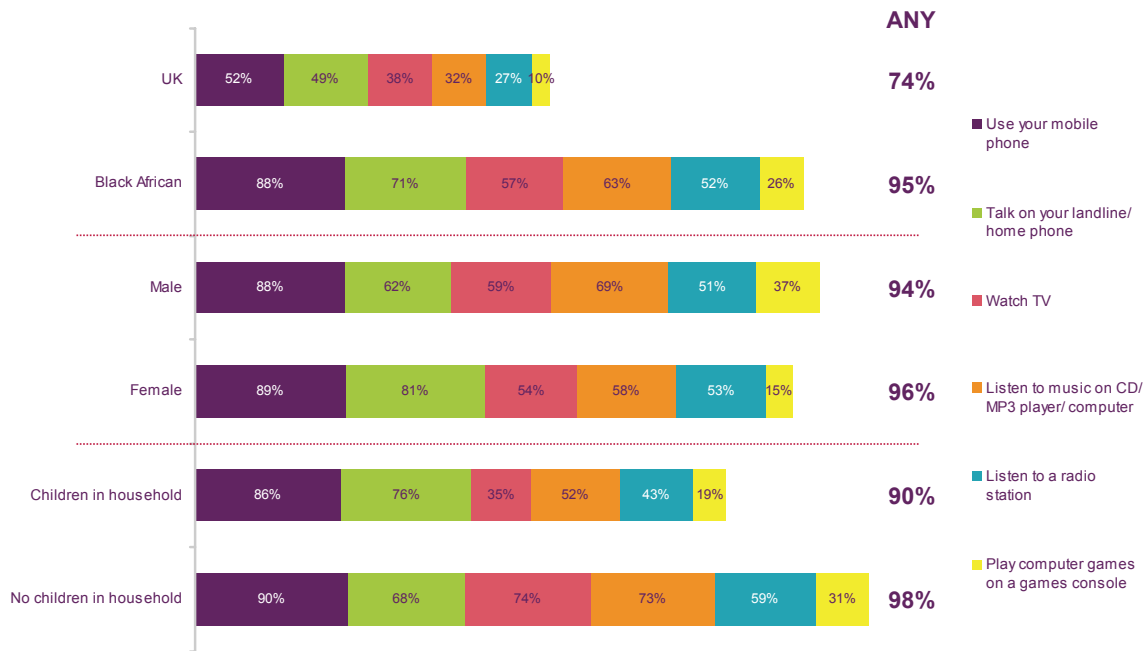
Most people use another media device while using the internet

Over nine in ten (95%) Black African adults have ever used other media while using the internet, in particular using a mobile or landline phone, watching television or listening to music or radio.

Within the Black African adult population who use the internet, use of other media concurrently appears to be more common among those without children in the household, with this group likely to be younger. Findings are not shown for Black African adults over 45, due to the low base size of adults over 44 who use the internet at home.

²⁴ Communications Market Special Report – Ethnic minority groups and communications services, June 2007

Figure 195: Using another device while using the internet



IN4A-F – Do you ever use the internet at home and do these other things at the same time? Is that most times or sometimes when you use the internet?
 Base: All adults aged 16+ who use the internet at home (1514 UK, 165 Black African, 79 Black African male, 86 Black African female, 75 Black African with children in household, 90 Black African with no children in household) NB BASE SIZE TOO LOW FOR BLACK AFRICAN 45+. LOW BASE SIZE FOR BLACK AFRICAN MALE, FEMALE, WITH CHILDREN IN HOUSEHOLD, WITH NO CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Using another media device while using the internet is more common than among UK adults overall (74%).

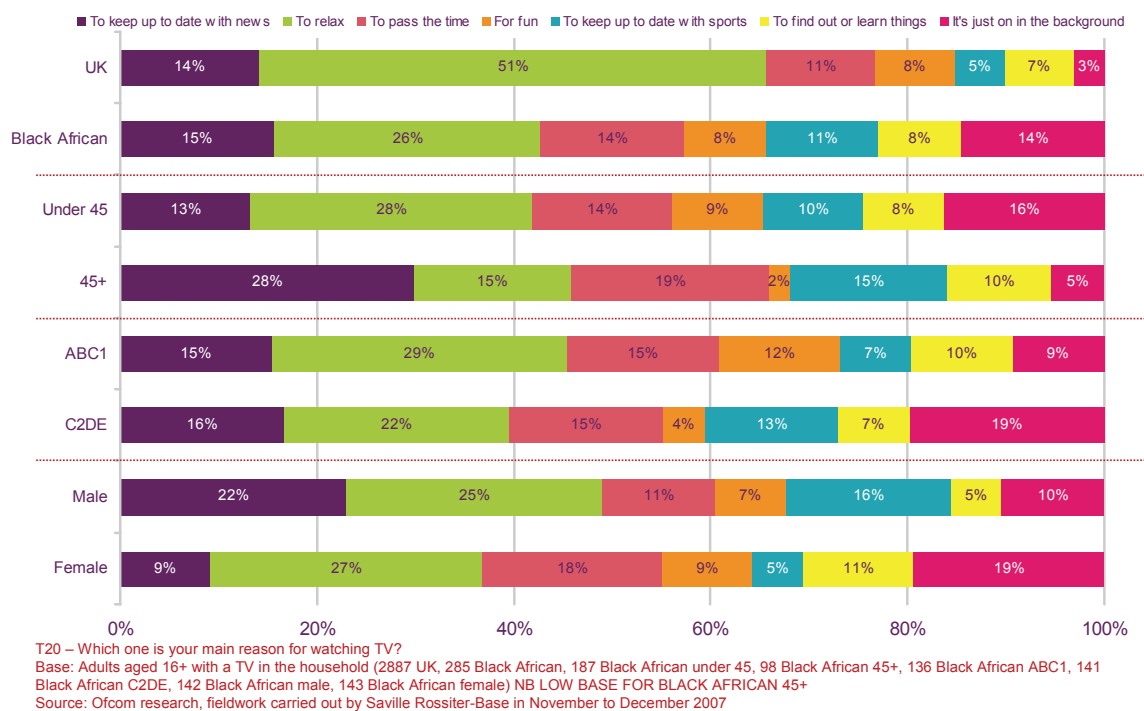
While UK adults under 45 are likely to use other media with the internet, this is even more common among Black African adults under 45 (95% compared with 84%). The higher incidence of using other media concurrently with using the internet is therefore not fully explained by the younger profile of the Black African adult population. As seen in Figure 190, 70% of Black African households who have the internet have a connection in the living room, significantly higher than UK households in general (45%). Having a connection in such a shared space may also be influencing the relatively high level of simultaneous use of devices.

People use media platforms for a variety of reasons

Black African adults give a diverse range of main reasons for watching television; the most common reasons are to relax, to keep up to date with news, to pass the time, and “to have it on in the background”.

Responses differ to some extent by age, with adults over 45 more likely to watch mainly to keep up with news.

Figure 196: Main reason for watching television



While the three most popular main reasons given for watching television do not differ from those given by UK adults, there is more diversity in the responses from Black African adults.

Although only a minority of Black African adults say they watch television mainly “because it is on in the background” (14%), this is more common than among UK adults overall (3%).

Compared to UK adults under 45, however, Black African adults in this age group are more likely to mainly watch because it is on in the background (16% compared with 4%).

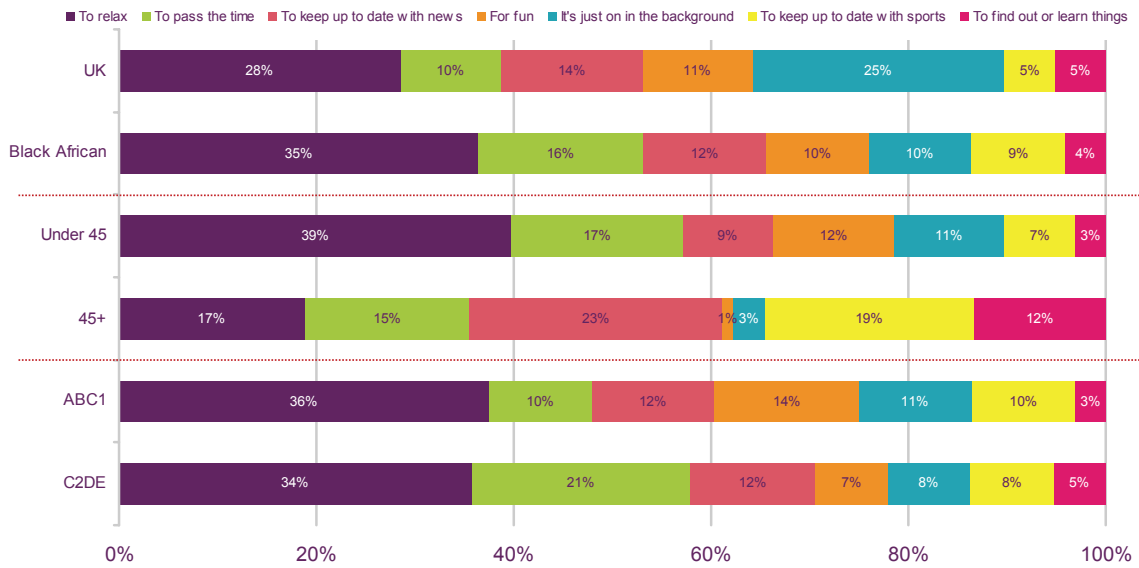
Black African radio listeners listen to the radio to relax or to pass the time

Four in five (78%) Black Africans listen to the radio at home, half through FM/ AM radio (50%), over one in five (23%) through DAB radio, and around one in seven either via the internet (15%) or through their digital television (14%).

As shown in Figure 197, they give a diverse range of main reasons for listening to the radio. The three most-mentioned reasons are: listening to the radio to relax (35%), to pass the time (16%) and to keep up to date with news (12%).

Radio listeners over-45 are more likely to listen to keep up to date with news or sports.

Figure 197: Main reason for listening to the radio



R14 – Which one is your main reason for listening to radio?
 Base: Adults aged 16+ who listen to radio at home (2043 UK, 238 Black African, 145 Black African under 45, 93 Black African 45+, 111 Black African ABC1, 122 Black African C2DE) NB LOW BASE SIZE FOR BLACK AFRICAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

The percentage who listen to radio at home is higher than the UK overall (73%), with more adults listening through a DAB set, or via the internet, but fewer listening through an FM/ AM radio.

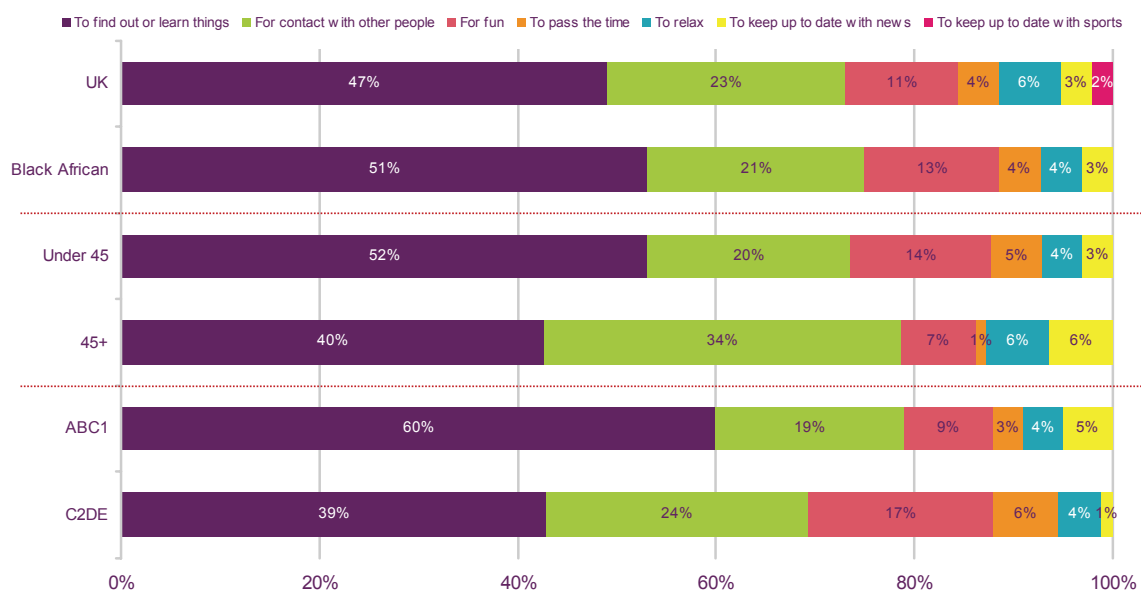
In comparison to the UK overall, Black Africans are more likely to say they listen to relax, to pass the time or to keep up to date with sports, and less likely to say they listen to the radio because it is on in the background.

“Finding out or learning new things” is the most-mentioned reason for using the internet

The two most popular main reasons for using the internet among Black African adults are to find out or learn things and for contact with other people.

Internet users over 45 are more likely to say their main reason for using the internet is for contact with other people, while those in ABC1 socio-economic groups are more likely to use the internet to find out or learn things.

Figure 198: Main reason for using the internet



IN51 – Which one is your main reason for using the internet?
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 218 Black African, 156 Black African under 45, 62 Black African 45+, 127 Black African ABC1, 84 Black African C2DE) NB LOW BASE SIZE FOR BLACK AFRICAN 45+, C2DE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

The main reasons for using the internet do not differ to any significant extent across the Black African and UK adult populations.

While Black African adults are less likely to use the functions associated with the internet we asked about on a weekly basis, and more likely to use the internet for entertainment, this does not influence their choice of main reason for using the internet.

7.3 Understand

This section looks at interest in, and confidence in using, digital services, attitudes towards the role of media and platform content, trust in television and internet content, checks and judgements made when visiting new websites, and concerns about platforms.

High levels of interest and confidence in using digital functions and services

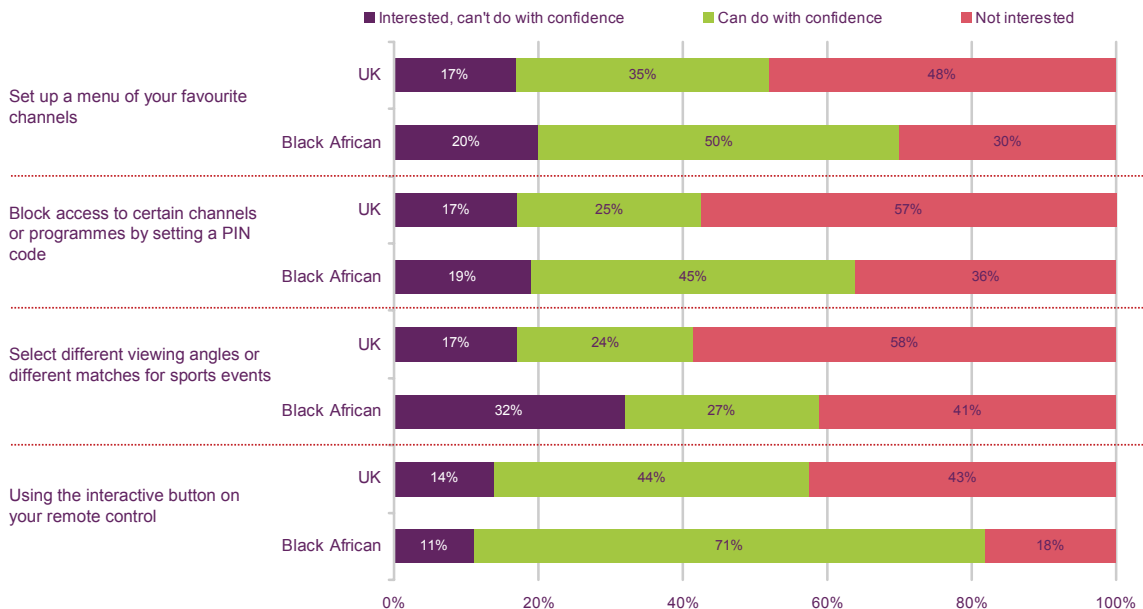
Those with a digital television service at home (82%) were prompted with four functions available through digital television. For each function they were asked to say if this was something they were interested in. Those interested in particular functions were then asked to say whether they could do the task with confidence. Figure 199 splits all digital television owners into one of three groups for each of the four functions: those who are not interested, those who are interested and can do the task with confidence, and those who are interested but cannot do it with confidence.

The majority of Black African adults are interested in each of the four digital television functions. The functions of most interest are using the interactive on the remote control (82%) and setting up a menu of favourite channels (70%). Around three in five are interested in using a PIN to block access to certain channels or programmes (64%) and in selecting different viewing angle or matches for sports events (59%).

Interest is higher among adults aged under 45, those in ABC1 socio-economic groups and males.

Most people who are interested in functions are also confident about using them, with one exception - more people say they are interested but not confident in selecting different viewing angles or matches.

Figure 199: Interest and confidence in using digital television services



T4 – I'm going to read out some different types of things you can do with some types of digital television, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ with multichannel TV (2351 UK, 244 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Interest in digital television services is higher compared to all UK adults with a digital television service. And interest in any of the functions among Black African adults under 45 exceeds that for UK adults of a similar age (92% compared with 75%).

Interest in digital radio platforms is lower than in other platforms

Those who listen to digital radio at home (41% of Black African adults) were prompted with four functions available through DAB radio sets.

About half are interested in each function, and interest is highest in seeing details of the music being played (77%).

Most who are interested in a function are also confident in using that function, although levels of confidence are lower compared to the other digital media. However, it is important to note that the functions are specific to certain models of DAB radio rather than digital radio more generally, which may suppress confidence levels.

Figure 200: Interest and confidence in using DAB radio sets



R3 – I'm going to read out some different types of things you can do with some kinds of digital radio, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ who listen to digital radio at home (766 UK, 123 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

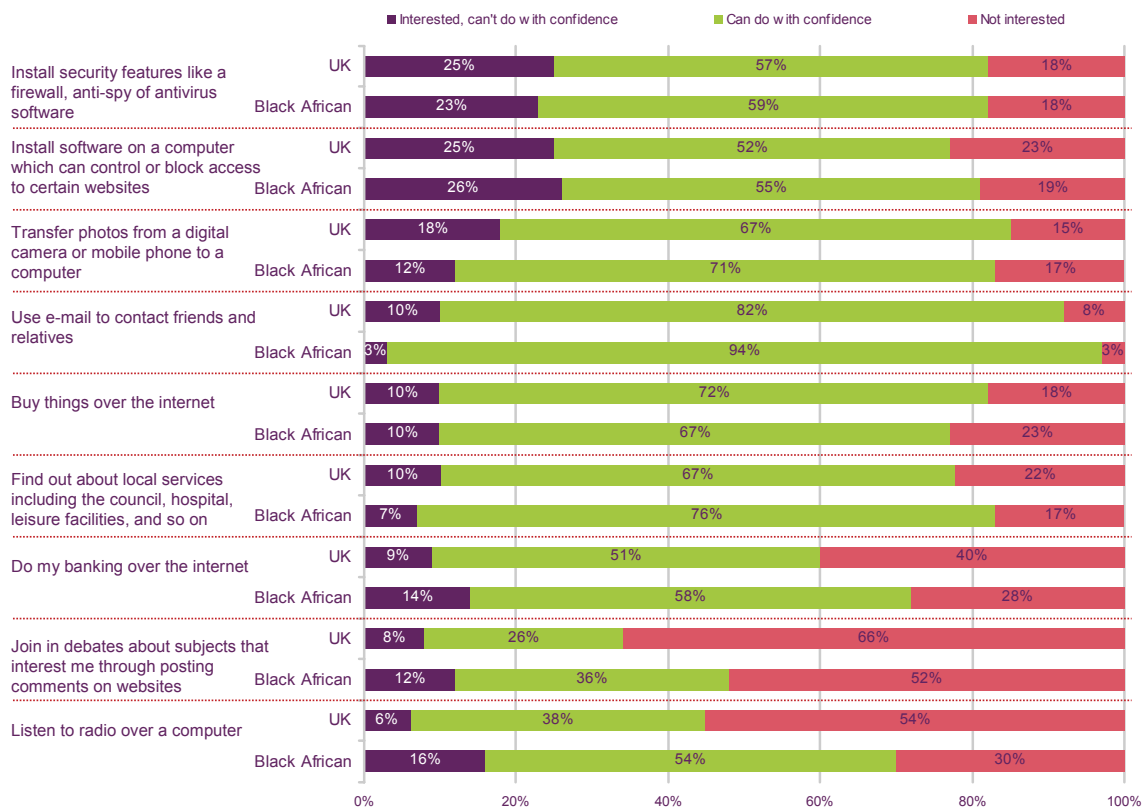
Compared to the general UK population, interest is higher among Black African digital radio listeners in recording a programme as it is being broadcast and in seeing details as the music is being played, with lower interest in listening to radio stations not available on FM/ MW or LW and in pausing/rewinding live radio.

Interest in internet functions is higher than for any other platform

Black Africans showed the most interest in using email, transferring digital photos to a computer, installing software which can control or block access to websites, installing security features, and finding out about local services.

Most people who are interested in functions are also confident in using them. Across the nine functions, a higher proportion of people say they are interested, but not confident, in installing blocking software or security features.

Figure 201: Interest and confidence in using internet functions



IN7A-I – Please look at the options shown on this card. I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I'd like you to say which of the options on the card applies to you.
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 218 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Although all adults have a relatively high interest in computer and internet functions, some functions are of more interest to Black Africans than to the general UK adult population: using email, online banking, listening to the internet radio and joining in debates by posting comments online. Unlike findings for the other EMGs we have assessed, interest is not lower for Black Africans for any particular function.

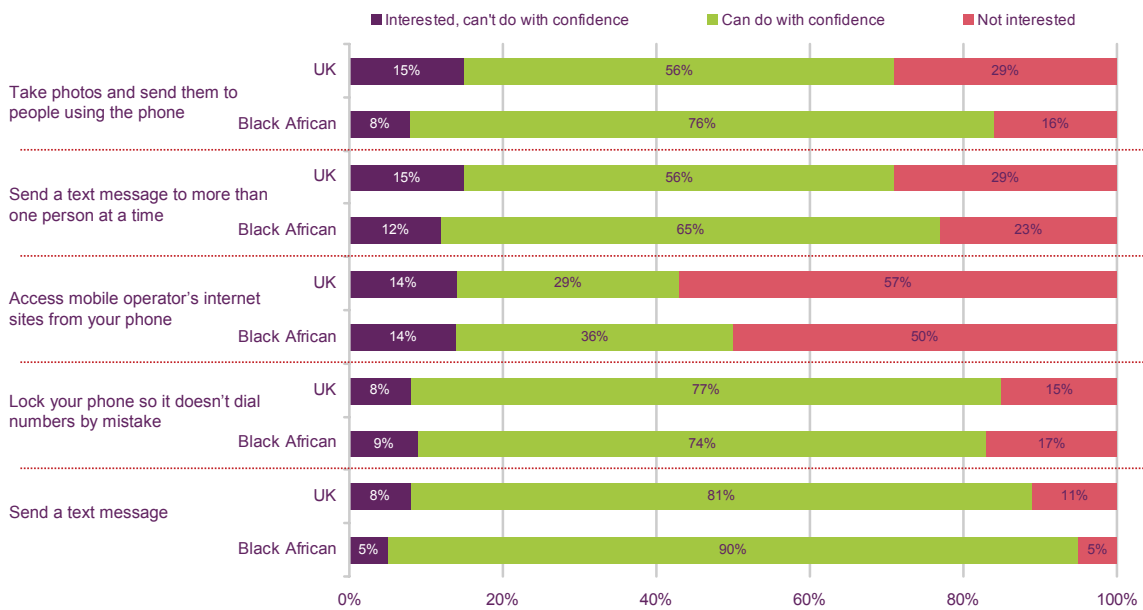
While Black African adults are less likely to use the internet at least weekly to make purchases or to bank online, it does not appear that this is a result of a lack of interest or confidence.

Interest in accessing mobile operators' sites is higher among Black Africans than among UK adults in general

All mobile phone users (95%) were asked how interested they were in five different mobile phone functions. The majority are interested in four of the five functions, with most people saying they are interested in text messaging (95%).

Most people who are interested in functions are also confident in using them. Across the five functions, a higher proportion of people say they are interested in, but not confident in accessing, mobile operators' internet sites and in sending a text message to more than one person at a time.

Figure 202: Interest and confidence in using mobile phone functions



M4 – I'm going to read out some different types of things that you can do with some kinds of mobile phones, and for each one I'd like you to say which of the options on the card applies to you
 Base: All adults aged 16+ with a mobile phone (2481 UK, 282 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

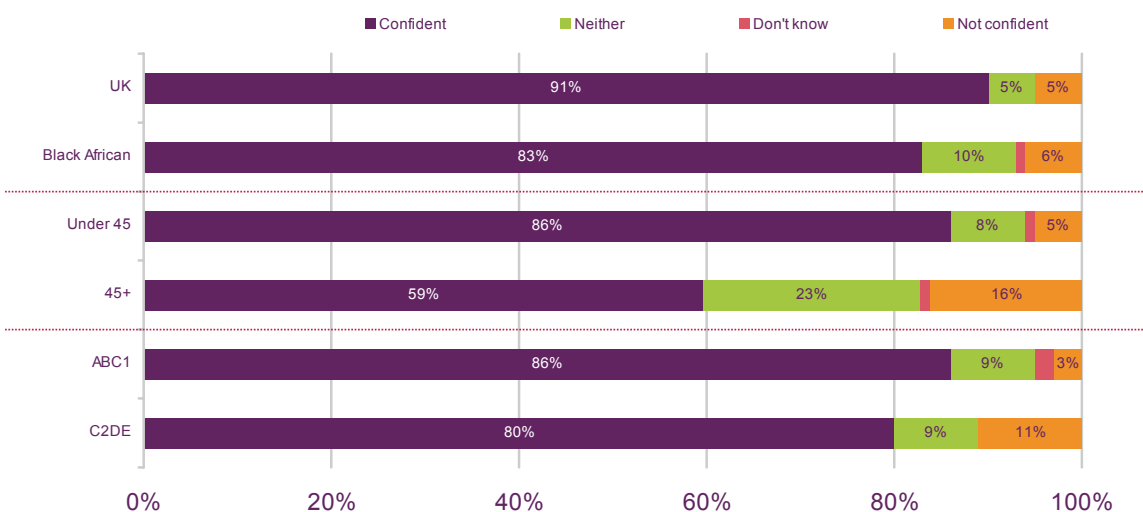
Interest is higher among Black African adults than among UK adults in all four functions: sending text messages, sending photos via mobile phones, sending a text message to more than one person at a time and accessing internet sites from a mobile phone.

Most people are confident about finding information online

Four in five (83%) Black African adults are confident about finding the content or information they want when they use the internet. Most of those who do not say they are confident give a neutral response (neither confident nor not confident).

Under-45s and those in ABC1 socio-economic groups are more confident.

Figure 203: Confidence in finding content online



IN9 – How confident are you that you can find the content or information you want when you go online?
 Base: All adults aged 16+ who use the internet at home or elsewhere (1514 UK, 218 Black African, 156 Black African under 45, 62 Black African 45+, 127 Black African ABC1, 84 Black African C2DE) NB LOW BASE SIZE FOR BLACK AFRICAN 45+, C2DE
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While the majority of Black African adults are confident that they can find the content or information they want online, their degree of confidence is lower than for UK adults overall (91%). While under-45s are more confident, this is at a lower level than UK adults under 45 (86% compared with 93%).

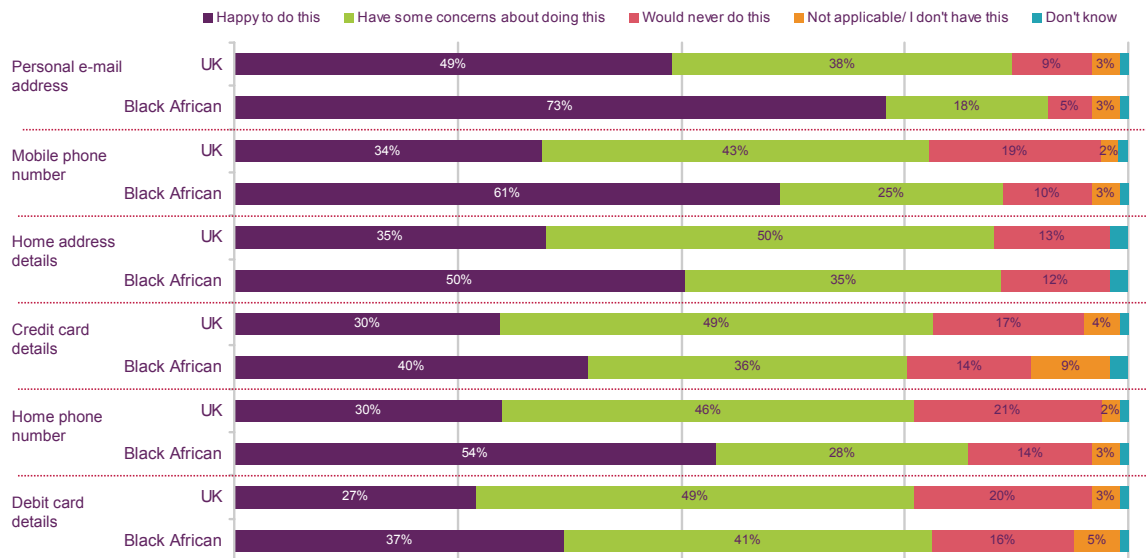
Black African adults are less likely to use the functions associated with the internet on a weekly basis and more likely to use the internet for entertainment. This different way of using the internet, which is also evident among internet users over 45, may explain the comparatively lower level of confidence in finding content or information online.

They have some concerns about giving out certain personal details.

The majority of internet users in the Black African adult population say they are happy to provide their personal email address, mobile or landline number online and half are happy to provide their home address online. However, less than half are happy to provide their credit or debit card details.

Most of those who are not happy to provide this information online say they have some concerns about doing this, rather than that they would never do this.

Figure 204: Information prepared to give when registering on websites



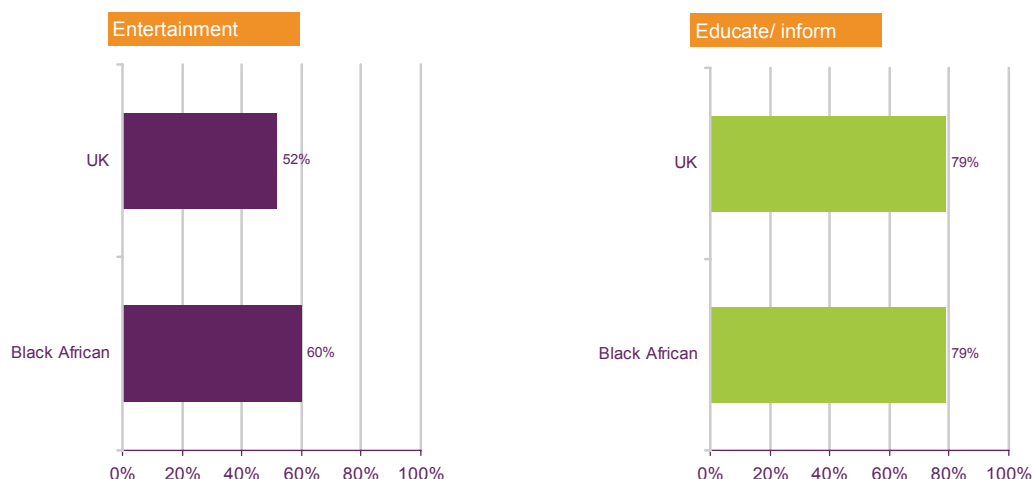
IN41 – Please look at the options shown on this card. I'm going to read out some details about information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns.
 Base: Adults aged 16+ who use the internet at home or elsewhere (1723 UK, 218 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

Black African adults are more open to providing each of the types of personal information shown above than are UK adults overall. The earlier finding, that Black African adults are less likely to use the internet for transactions, is therefore not due to higher levels of concern about the information they are prepared to give when registering on sites.

The main role of the internet is more likely to be to *inform* rather than to *entertain*

Black African adults are more likely to say that the main role of the internet is education (79%) rather than entertainment (60%). Views on the main role of the internet are fairly consistent across the demographic groups within the Black African adult population.

Figure 205: Main role of the internet: *to entertain, or to inform and educate*



IN48D-E – The main role of the internet should be to provide entertainment/ The main role of the internet should be to inform and educate people
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 218 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

As with the Black African adult population, UK adults overall are most likely to view the main role of the internet as being for education.

Compared to UK adults in general, the percentage of Black African adults who view the main role of the internet as being for entertainment is higher. This is consistent with the earlier finding that using the internet for downloading or watching content online is much more common among Black African adults.

Awareness of funding is higher for broadcasting than for the internet

Funding of television content

BBC channels are funded by the licence fee and commercial public service broadcast (PSB) channels are funded by advertising (programme sponsorship provides a secondary revenue stream).

Funding of radio content

BBC stations are funded by the licence fee and commercial stations are funded by advertising (programme sponsorship provides a secondary revenue stream).

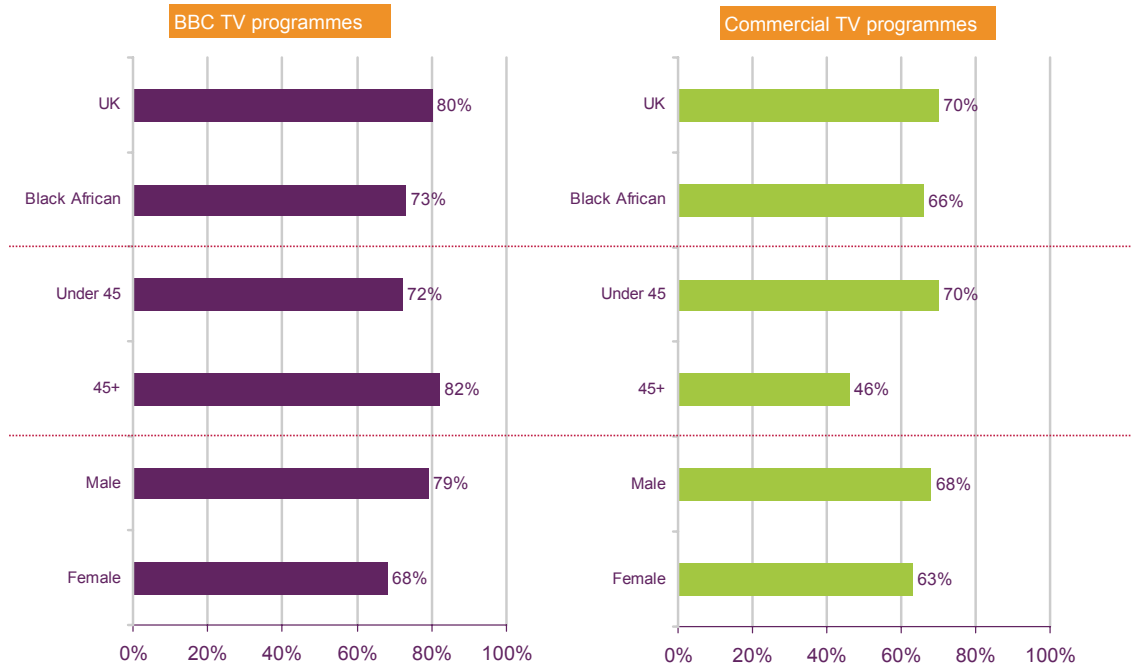
Funding of websites

The BBC website is funded by the licence fee and search engine websites such as Google are funded by advertising.

Three in four (73%) Black African adults are aware of how BBC television programmes are mainly funded, and two in three (66%) are aware of how commercial television programmes are mainly funded.

While awareness of BBC television funding is higher among adults over 45, the reverse is true for awareness of commercial television funding, with higher awareness among adults under 45.

Figure 206: Understanding main source of television programme funding



T8/T9 – How would you say BBC TV programmes are mainly funded?/ How would you say programmes are mainly funded on ITV, Channel 4 and Five?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 147 Black African male, 153 Black African female)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Awareness of how BBC television programmes and commercial television programmes are funded is lower among Black African adults than among the UK adult population as a whole. However, awareness of commercial television programme funding is comparable.

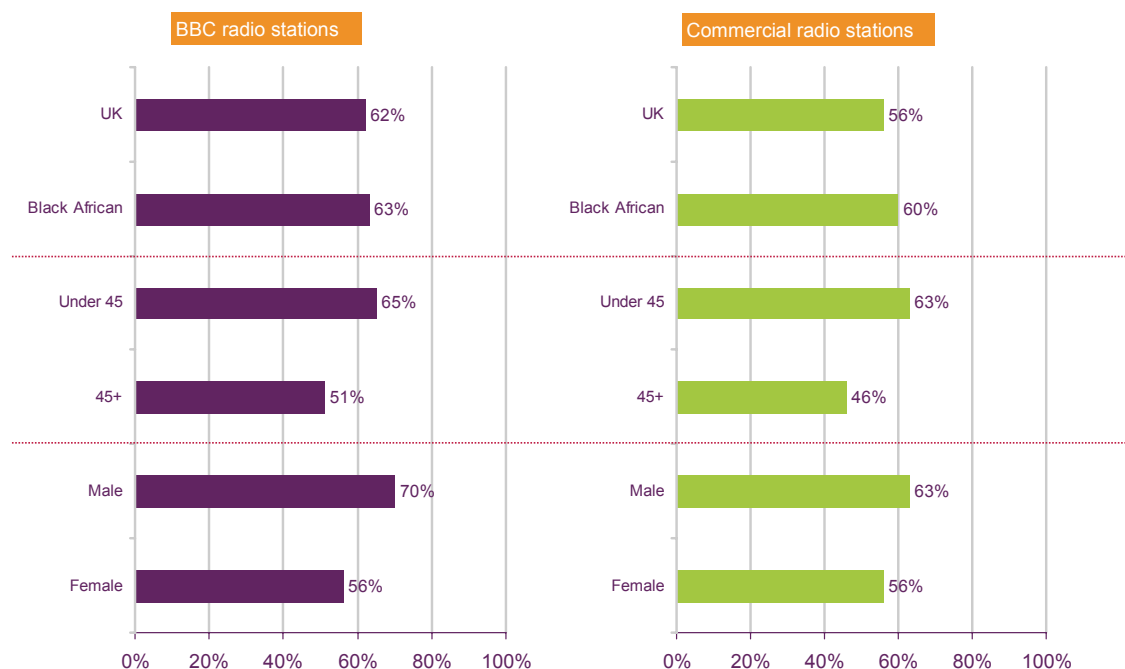
There is little difference between Black African and UK adults under 45 in their awareness of television programme funding. As such, it appears that awareness levels at the overall level are influenced by the younger profile of the Black African adult population.

Awareness of how BBC and commercial radio stations are funded is at similar levels

Among Black African adults, around three in five are aware of the main source of funding for BBC radio stations (63%) and for commercial radio stations (60%).

Awareness of both types of funding is higher among adults under 45.

Figure 207: Understanding main source of radio station funding



R5/R6 – How would you say BBC radio stations are mainly funded?/ How would you say the other main radio stations are mainly funded?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 147 Black African male, 153 Black African female)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

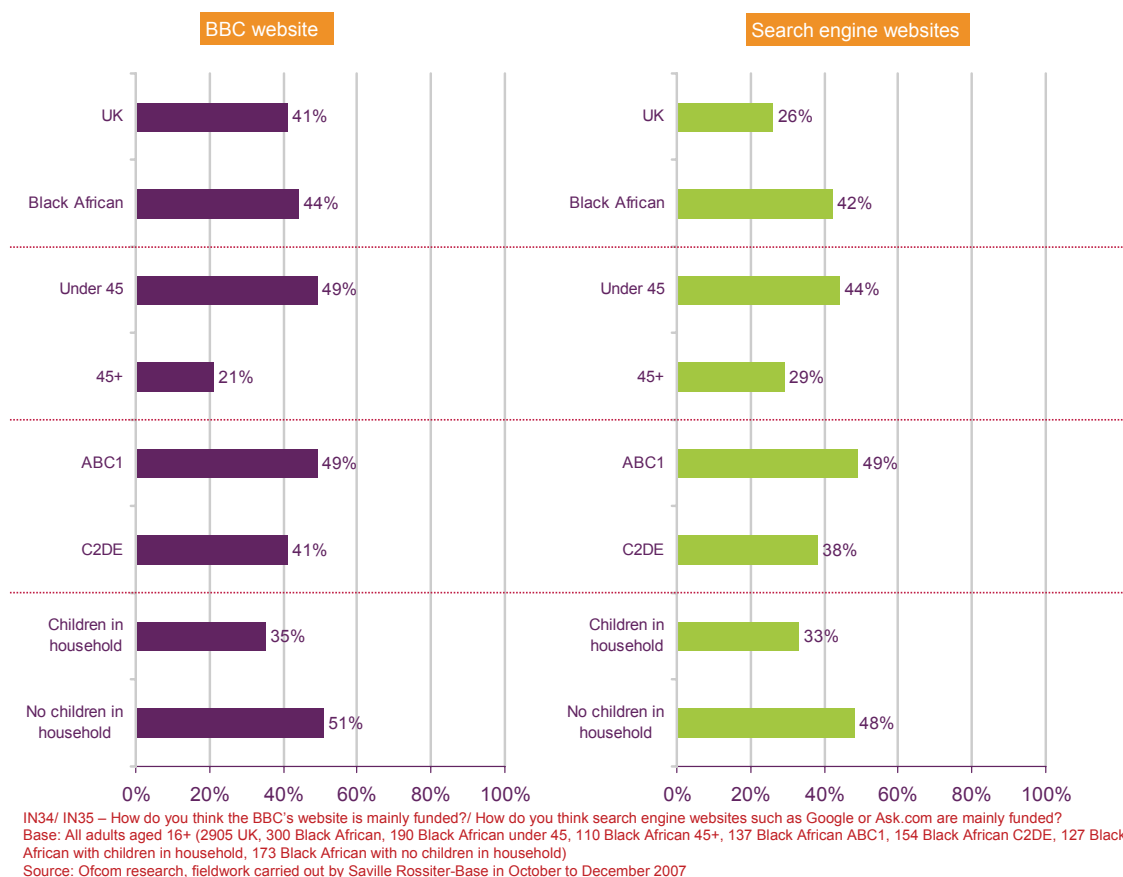
Awareness levels do not differ significantly from the general UK adult population, for either BBC radio (62%) or commercial radio (56%).

Under-45s are more likely to be aware of website funding than over-44s

Awareness of the main source of the BBC website (44%) and search engine website funding (42%) is at similar levels for the Black African adult population, with around two in five aware for each.

Awareness of both types of funding is higher among adults under-45.

Figure 208: Understanding main source of website funding



Black African adults are more aware than UK adults overall (26%) of how search engine websites are mainly funded, with awareness of BBC website funding at a similar level to the average for UK adults (41%).

Awareness of the regulatory environment is higher for broadcasting than for internet or mobile phone content regulation

Television regulatory environment

BBC channels are regulated by the BBC Trust and Ofcom and UK commercial channels are regulated by Ofcom.

Radio regulatory environment

BBC stations are regulated by the BBC Trust and Ofcom and UK commercial stations are regulated by Ofcom.

Internet regulatory environment

There is no statutory regulatory body generally responsible for audio-visual content on the internet.

The BBC Trust, established by Royal Charter, issues a service licence for bbc.co.uk which encompasses BBC iPlayer and can consider any complaints about its content.

The Association for Television On-Demand (ATVOD) is a self-regulatory body committed to protecting consumers of on-demand audio-visual content on services provided by its members. Its current full members are BT, On Demand Group, Virgin Media, Channel 4, BBC (Affiliate Member), Tiscali, FilmFlex and ITV.

Sites based on user-generated content (UGC) are not subject to any statutory regulation, beyond the prohibition on illegal content.

Mobile phone content regulatory environment

All UK mobile phone operators comply with a voluntary code, under which they commit to controlling under-18s' access to adult content.

- Mobile operators have an age check system under which subscribers must show that they are 18 or over to access 18 rated content.
- In addition, a subscriber can request that the block be applied to an existing mobile number.

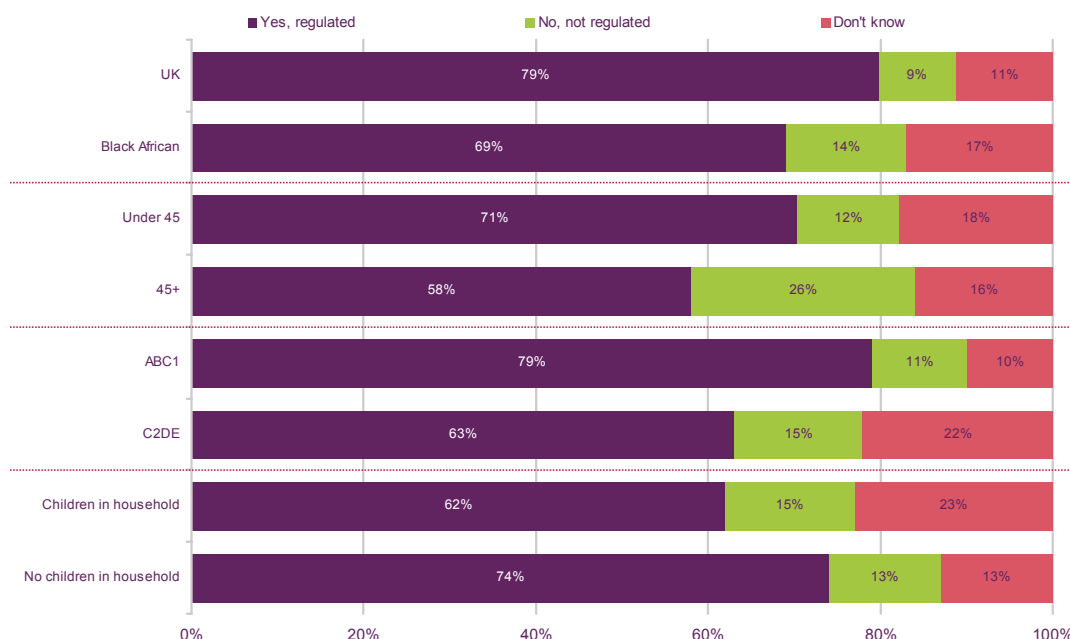
Electronic gaming regulatory environment

There is an industry self-regulatory framework in place for video games, under which games are voluntarily rated and labelled under the Pan European Game Information system (PEGI). PEGI ratings (3+, 7+, 12+, 16+ and 18+) provide information to consumers about the ages for whom a particular game is appropriate. In addition, in the UK, games with adult content (gross violence, criminal or sexual activity) must be reviewed and rated by the British Board of Film Classification, and bear a BBFC label. Under the Video Recordings Act 1984, games which receive BBFC 18 rating must not be sold to minors.

Two in three (69%) Black African adults say that television programmes are regulated. Adults under 45 and those in ABC1 socio-economic groups are more likely to say this.

While a minority say television programmes are not regulated, this belief is more evident among over-44s and those in C2DE socio-economic groups.

Figure 209: Whether believe television programmes are regulated



T12 – As far as you know, is the Internet regulated in terms of what can be shown and written?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

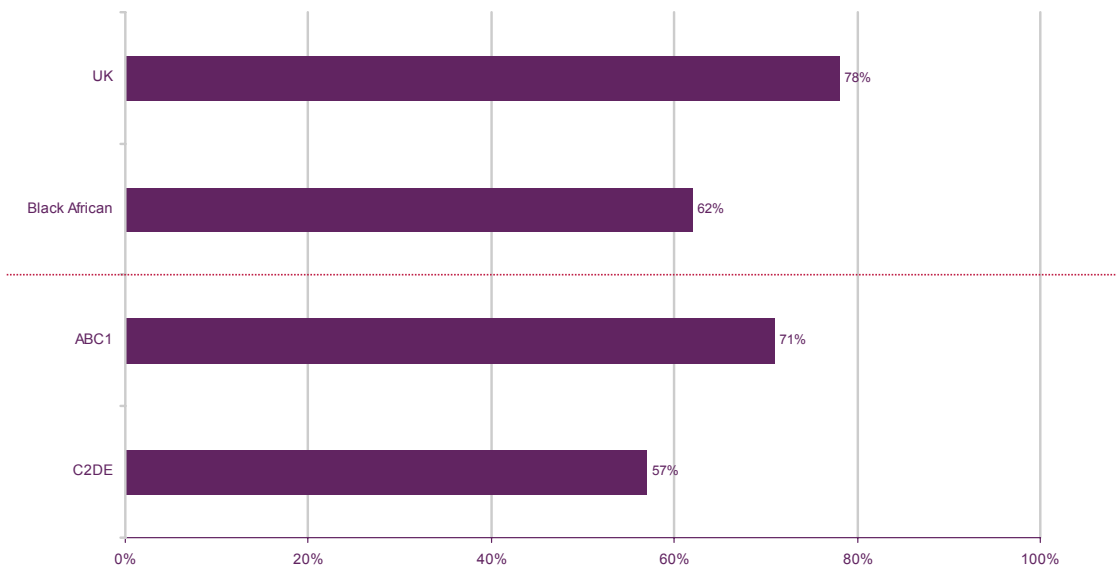
Compared to UK adults overall (79%), fewer Black African adults believe that television programmes are regulated (69%), and more believe they are not regulated.

This difference is likely to be related to the younger profile of the Black African adult population, as under-45s are as likely as the same age group in the UK population in general to believe that television programmes are regulated (71% compared with 77%).

One element of television regulation is the watershed - the requirement that any content which contains material that is unsuitable for children should not, in general, be shown before 21:00 or after 05:30.

Three in five (62%) Black African adults say there is a television watershed which starts at 9pm. Awareness of the watershed is higher among those in ABC1 socio-economic groups.

Figure 210: Whether aware of 9pm television watershed



T14 – Is there a time of day after which programmes that are considered unsuitable for children can be shown? What time is this?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 137 Black African ABC1, 154 Black African C2DE)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Awareness of the 9pm watershed is lower than the level for UK adults in general (78%)

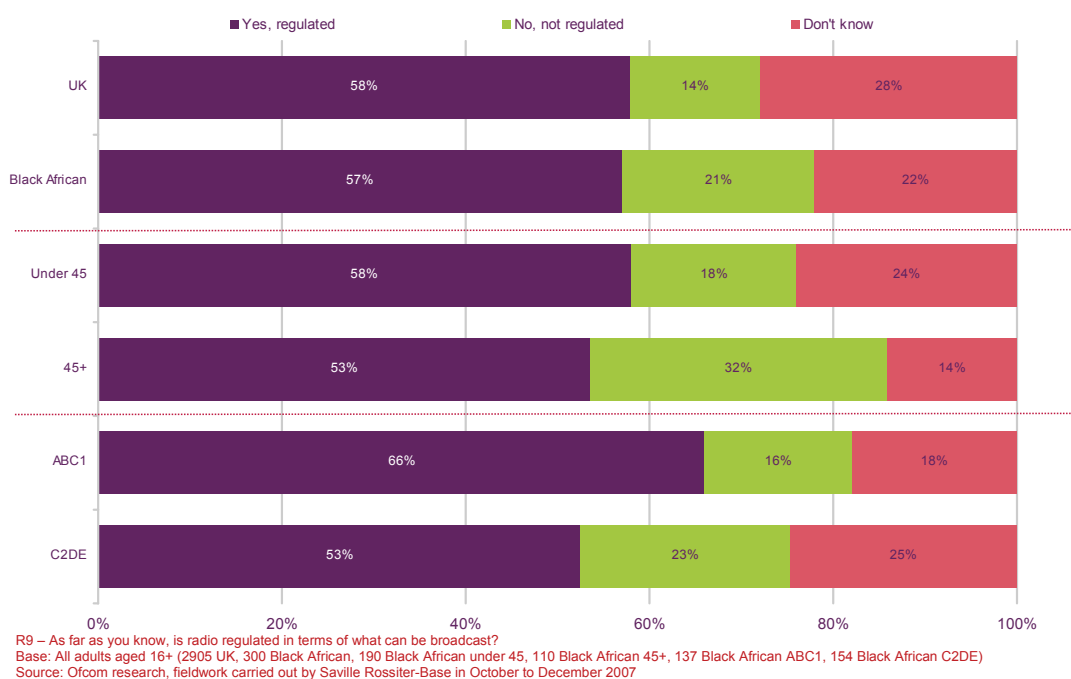
This difference is likely to be related to the younger profile of the Black African adult population, as adults under 45 are less likely than all UK adults in the same age group to be aware of the watershed (60% compared with 77%).

Over half are aware that radio broadcasts are regulated

The majority (57%) of Black African adults say that radio is regulated in terms of what can be broadcast, with most of the remainder equally split between those saying it is not regulated and those who are unsure.

The minority belief that radio is not regulated is more evident among adults over 45 and those in C2DE socio-economic groups.

Figure 211: Whether believe radio broadcasts are regulated



At the overall level, belief that radio broadcasts are regulated is at a similar level to the average for UK adults overall (58%). However, more Black African adults say that radio is not regulated, while UK adults generally are more likely to be unsure.

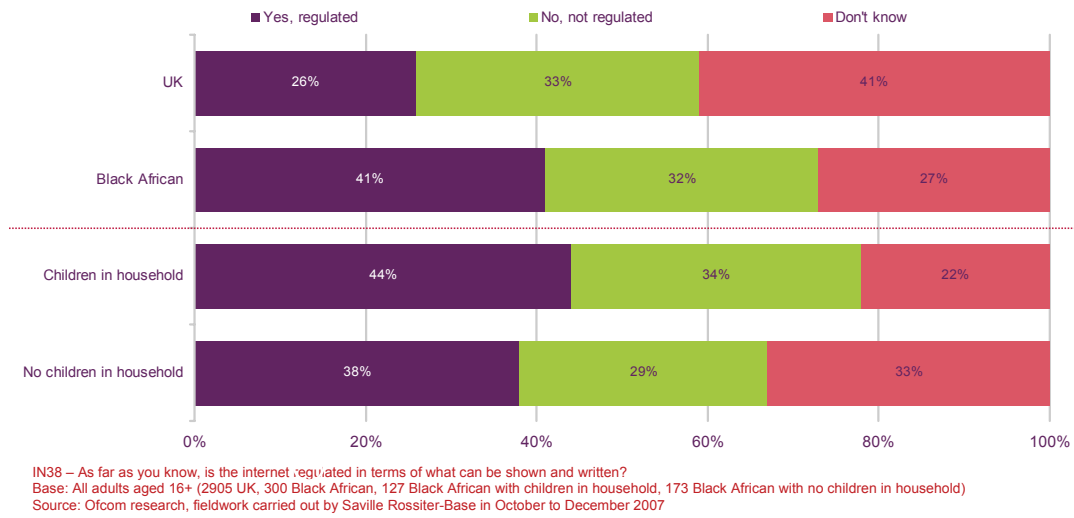
Listening to the radio at home is more common among Black African adults overall (78% compared with 73% of the UK population) which may help to explain the lower percentage saying they are unsure.

A higher proportion of Black African adults than UK adults in general say the internet is regulated

Two in five (41%) Black African adults say that the internet is regulated in terms of what can be shown and written, with most of the remainder saying it is not regulated.

Responses do not vary to any significant extent by age or socio-economic group, but those without children are more likely to be unsure whether the internet is regulated.

Figure 212: Whether believe internet content is regulated



Opinions on internet content regulation among Black African adults are almost a reverse of those expressed by UK adults in general; where 41% of Black African adults are unsure and 26% say it is regulated.

The younger profile of the Black African adult population influences this difference in perception of internet regulation, as Black Africans under 45 are more likely than the same age group in the UK adult population to say that internet content is regulated (41% compared with 28%).

There is confusion about whether mobile phone content is regulated

When asked whether mobile phone content (such as web pages and downloaded videos) is regulated, the most common response is that people don't know.

Belief that mobile content is regulated is higher among Black African adults over 45 and ABC1s, although only a minority in each case say that mobile phone content is regulated.

Figure 213: Whether believe mobile phone content is regulated



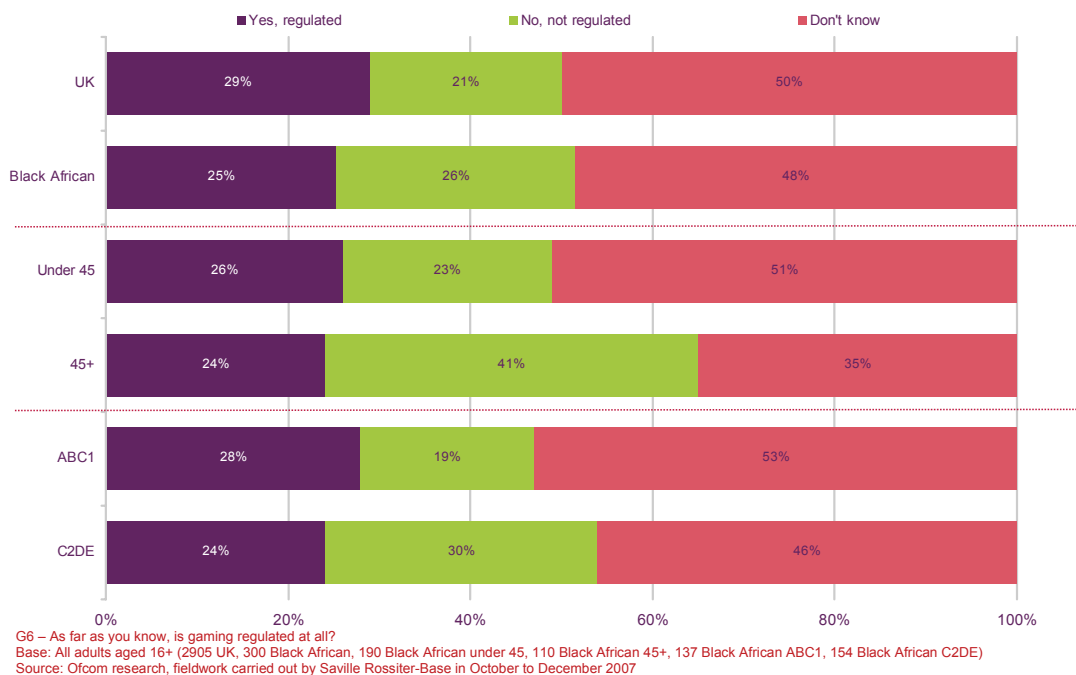
Black African adults are more likely than UK adults overall to say that mobile phone content is regulated (20%), but nearly half of adults in each population say they are unsure.

There is a similar level of confusion about the regulation of gaming

As with knowledge about internet and mobile regulation, there is confusion about gaming regulation. Just under half (48%) say they don't know if gaming is regulated and one in four (25%) believe it is regulated.

Experience of gaming is higher among under-45s and those in ABC1 socio-economic groups, but these adults are more likely to say they are unsure whether gaming is regulated.

Figure 214: Whether believe gaming is regulated



Responses regarding the regulation of gaming do not differ to any significant extent from those given by the general UK adult population.

Broadly similar proportions of Black Africans agree that television content must be free to be expressive and creative, and that users must be protected from offensive or inappropriate content

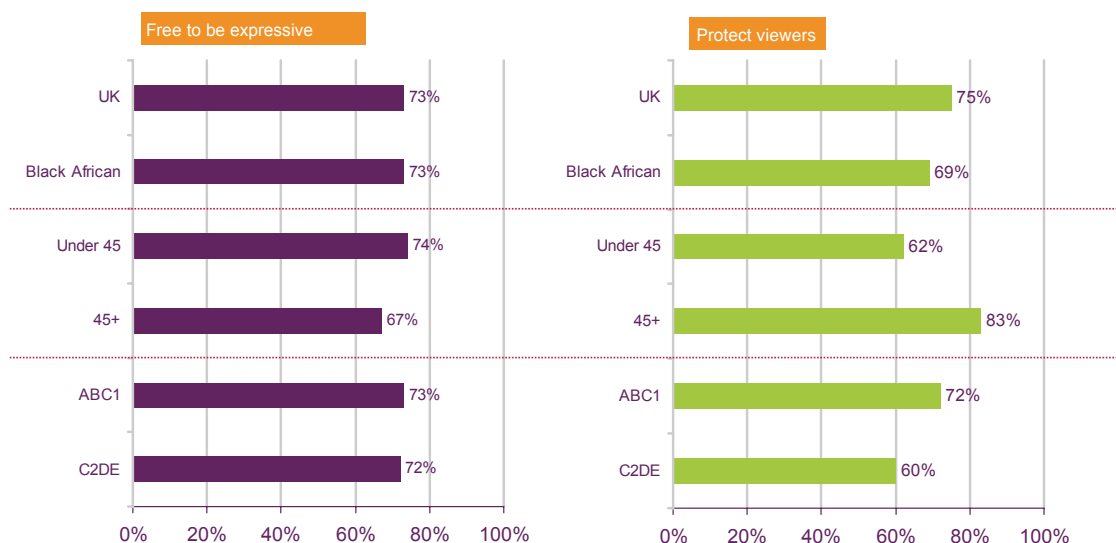
The majority of Black African adults agree (either strongly or slightly) that:

- *television programmes must be free to be expressive and creative; and*
- *television viewers must be protected from seeing inappropriate or offensive content.*

Agreement is broadly equal for each of these statements.

There is no significant variation within the Black African adult population as to whether television programmes should be free to be expressive and creative. Agreement that television viewers must be protected has higher agreement among the over-44s and those in ABC1 socio-economic groups.

Figure 215: Attitudes towards television content: *must be free to be expressive and creative vs viewers must be protected from offensive or inappropriate content*



T17A-B – TV programmes must be free to be expressive and creative/ TV viewers must be protected from seeing inappropriate or offensive content
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Both the direction and strength of attitudes towards television content match that for the UK adult population.

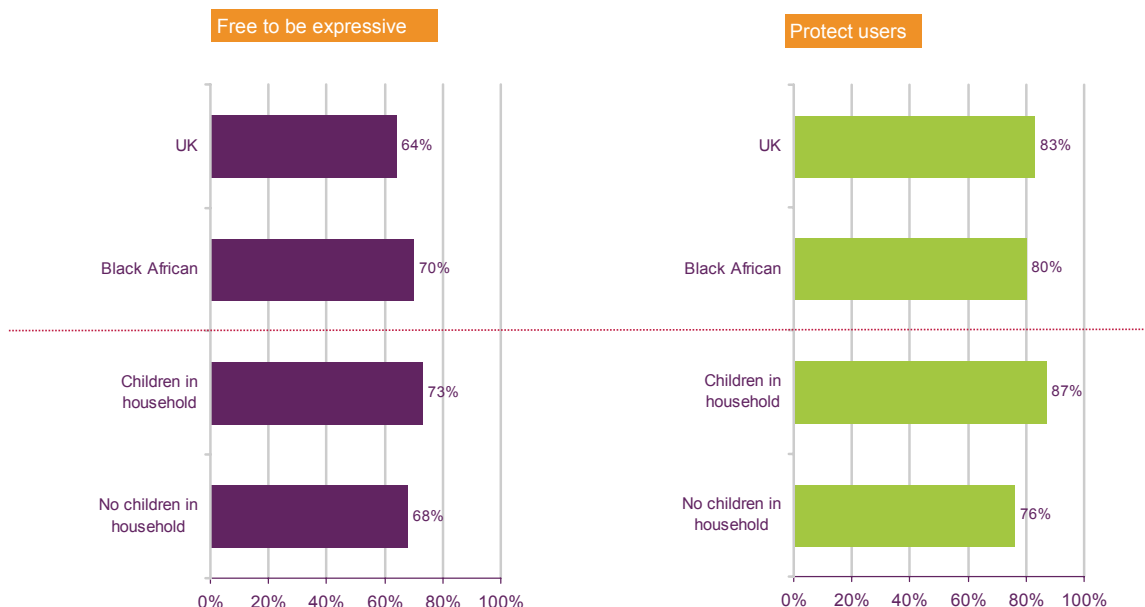
Attitudes towards protection from internet content are stronger than attitudes towards the freedom of expression of content

The majority of Black African adults who use the internet agree (either strongly or slightly) that:

- *internet sites must be free to be expressive and creative; and at the same time*
- *internet users must be protected from seeing inappropriate or offensive content*

Agreement is stronger that users must be protected, with this view more evident among those with children in the household.

Figure 216: Attitudes towards internet content: *must be free to be expressive and creative vs users must be protected from offensive or inappropriate content*



IN48A-B – Internet sites must be free to be expressive and creative/ Internet users must be protected from seeing inappropriate or offensive content
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 218 Black African, 92 Black African with children in household, 126 Black African with no children in household) NB LOW BASE SIZE FOR BLACK AFRICAN WITH CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Overall, both the direction and strength of attitudes towards internet content match those of the UK adult population.

Over half of Black African adults agree that they tend to trust what they see on television

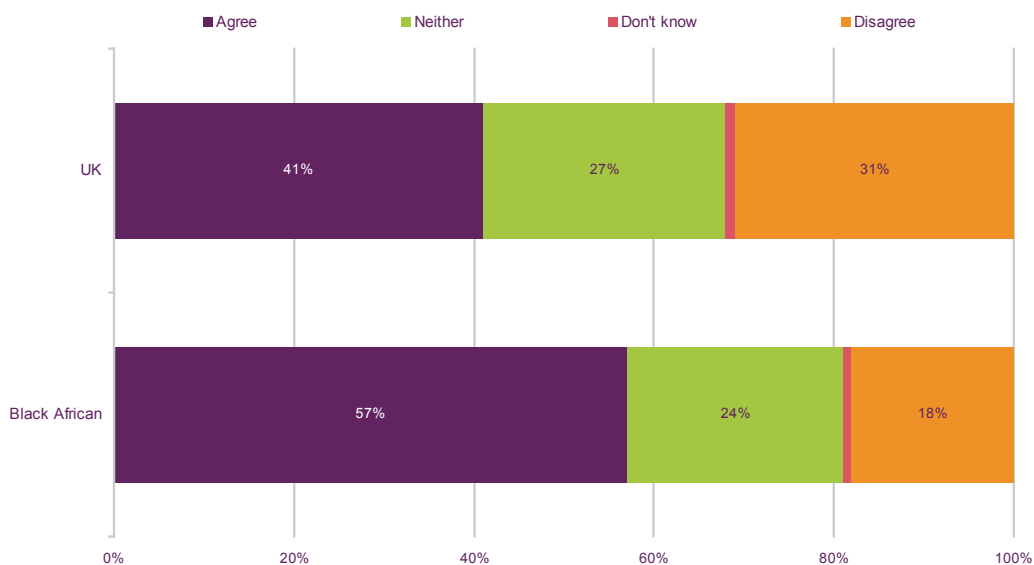
Of those with at least one television in the household (96%), over half (57%) say they trust what they see when they watch television, while one in five (18%) do not.

Trust in television content does not differ by demographics within the Black African adult population.

It should be noted that this question did not distinguish between different genres of television programming or between different television channels, whether UK or foreign-based.

Nine in ten (91%) Black African adults watch news and factual programmes on television. Among these viewers, two in five (43%) say their level of belief in these programmes varies according to the channel, or that they are sceptical about the information in these programmes. This degree of critical evaluation is more evident among those aged over 44 (63%) and those with children in the household (48%).

Figure 217: Trust in television: *when I watch television I tend to trust what I see*



T17D – 'When I watch TV I tend to trust what I see'
Base: Adults aged 16+ with a TV in the household (2887 UK, 285 Black African)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Trust in television content is higher among Black African adults, with UK adults in general more likely (31%) to disagree that they trust what they see on television.

A similar percentage of UK adults (94%) watch news or factual programmes, but critical evaluation of these programmes among viewers is at a higher level (51%) among these viewers than among Black African adults.

Opinions on trust in online content are divided

Broadly similar proportions of Black African adults say they tend to trust online content or are neutral about trusting it. Responses do not vary by demographics to any significant extent.

As with assessing trust in television content, this question did not differentiate by type of content.

Figure 218: Trust in internet: *when I visit websites I tend to trust what I read or see*



IN49A – ‘When I visit websites, I tend to trust what I read or see’
 Base: All adults aged 16+ who use the internet at home or elsewhere (1514 UK, 218 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

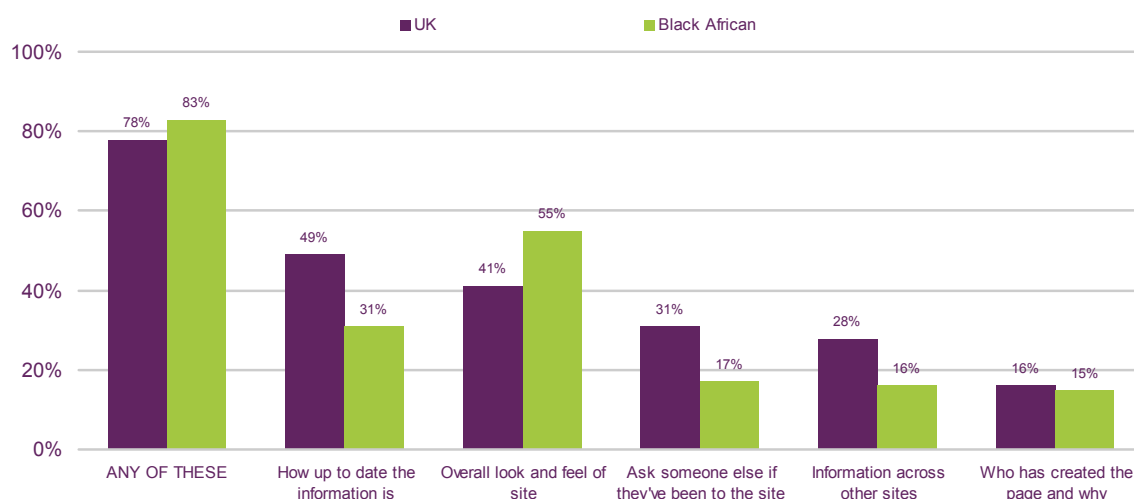
There are no significant differences between the Black African and UK adult populations in terms of trust in online content, with 42% of UK adults saying they trust what they read or see. However, more UK adults say they don’t trust (27%) online content and fewer give a neutral (neither trust nor distrust) response.

Most internet users check new websites before they use them and make judgements before entering personal details

We asked people whether they check a new website before using it, and whether they make any judgements before entering personal details. Eighty-five per cent of Black Africans who use the internet ever use new websites. Visiting new websites is more common for users under 45 and those with no children in the household.

Among those who do visit new websites, four in five (83%) make some kind of check when doing this. Users are most likely to check the overall look and feel of the site, with this being the only one of the checks made by the majority of all users.

Figure 219: Checks made when visiting new websites



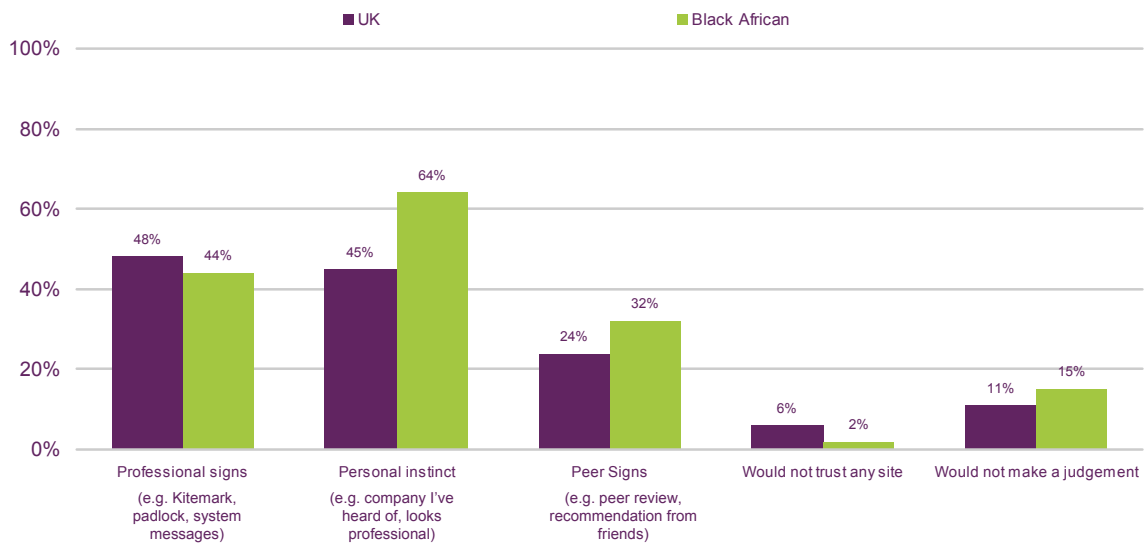
IN16 – Thinking about new websites you visit, which, if any, of these things would you check?
 Base: All adults aged 16+ who use the internet at home or elsewhere who visit new websites (1536 UK, 178 Black African)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The proportion that ever visit new websites is lower than the average across UK internet users generally (91%).

At the overall level, the incidence of making checks when visiting new websites is at a similar level to the general UK population. While less likely than UK users to check how up-to-date the site is, or to compare information across a number of websites, Black African users are more likely to check the overall look and feel of the site.

Using personal instinct is the main way Black African adults make a judgement before entering their personal details

The majority (85%) of Black African adults say they make a judgement about a website before entering personal details, in particular based on their personal judgement (a known company or professional look and feel), looking for professional signs (such as a padlock sign or system message) or peer signs.

Figure 220: Judgements made about a website before entering personal details

IN42 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) (Spontaneous responses)

Base: All adults aged 16+ who use the internet at home or elsewhere (1514 UK, 218 Black African)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While the proportion that would make a judgement before entering personal details does not differ to any significant extent from the average for UK adults (89%), Black African adults are more likely to make a judgement based on personal instinct or on peer signs than are UK users.

Most people have concerns about what is on television

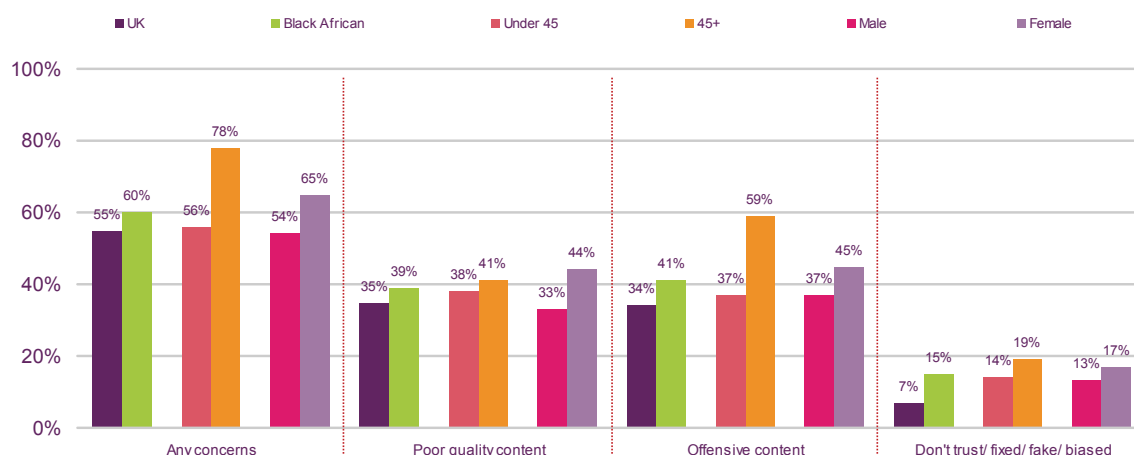
The majority (60%) of Black African adults have a concern about what is on television. Unprompted responses regarding these concerns have been grouped into three themes:

- poor quality content - responses such as *too many repeats, too many reality television programmes, poor quality programmes* and *too many advertising breaks*;
- offensive content - responses such as *violence, bad language, sex/ nakedness* and *people behaving badly*; and
- don't trust/ fixed/ faked/ biased - responses such as *phone-in competitions that are fixed/ faked*.

Around two in five (41%) are concerned about offensive content or poor quality programmes (39%), and around one in seven (15%) have concerns about issues of trust in television. The three most common unprompted concerns about what is on television are sex/ nakedness, bad language, and violence.

At the overall level, concerns are more common among over-44s and females.

Figure 221: Concerns about what is on television



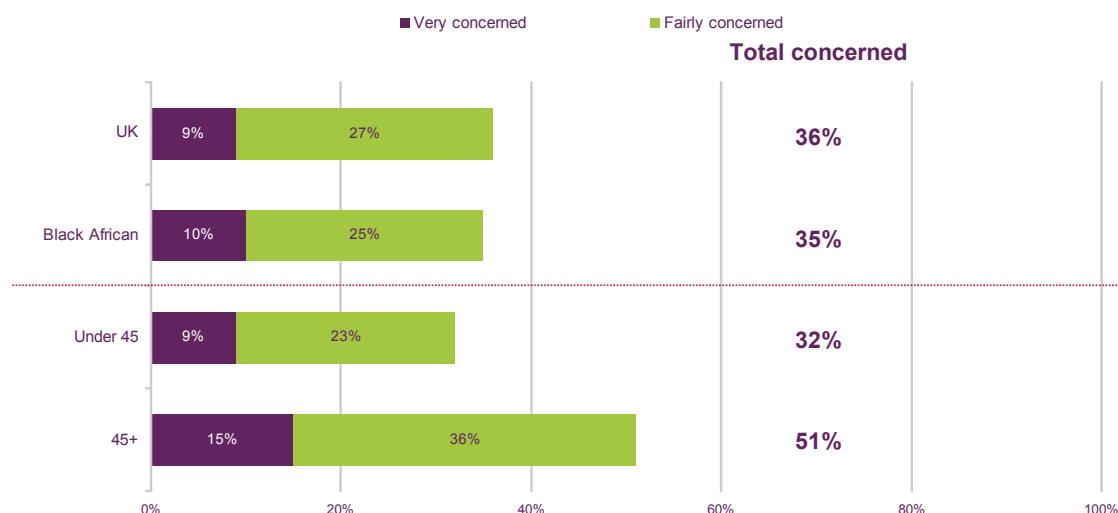
T10 – Can you tell me if you have any concerns about what is on TV? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 147 Black African male, 153 Black African female)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Unlike the other EMGs we have assessed, for whom concerns about what is on television are higher, overall concerns are at a similar level for both Black African adults and UK adults. Concerns relating to offensive content and lack of trust are, however, more common among Black African than among UK adults.

When asked to what extent they are concerned about what is on television, around one-third (35%) say they are either very, or fairly, concerned.

The extent of concern about what is on television is higher among adults who are over 45, but otherwise does not vary to any significant extent by demographics.

Figure 222: Extent of concern about what is on television



T11 – Overall, how concerned are you about what is on TV?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The overall extent of concerns is similar to that found for UK adults in general (36%), as with the overall mentions of any concerns.

Black African adults are more likely than UK adults in general to be concerned about what is on the radio

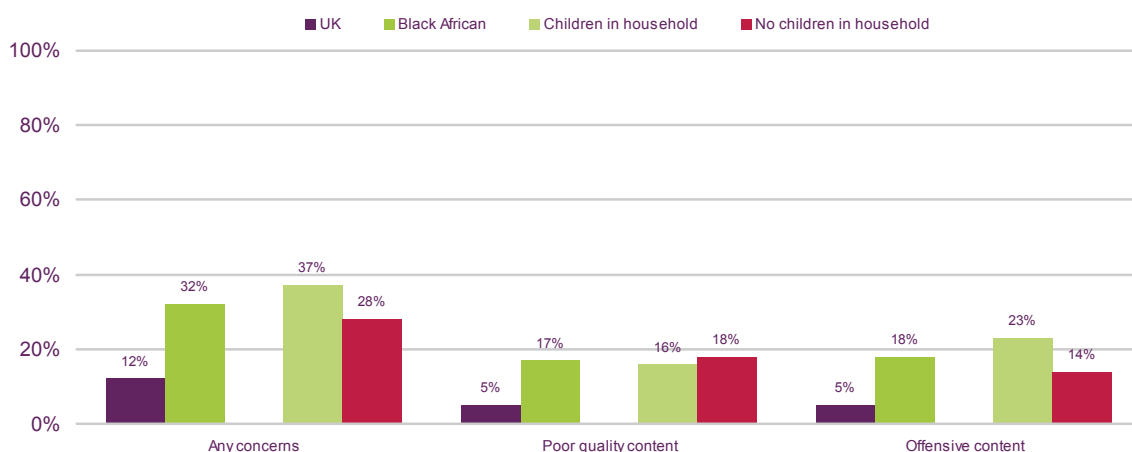
One in three (32%) Black African adults have any concerns about what is on the radio. Unprompted responses regarding these concerns have been grouped into two themes:

- poor quality content - responses such as *too many advertising breaks, lack of originality/ programmes are similar, and poor quality programmes*; and
- offensive content - responses such as *bad language, bad taste/ shock tactics and drug references*.

Concerns are broadly equal across both of these themes; 18% mention offensive content (mainly bad language) and 17% mention poor quality content (mainly too many advertising breaks).

Concerns about radio generally, and about offensive content in particular, are more common among those with children in the household.

Figure 223: Concerns about what is on the radio



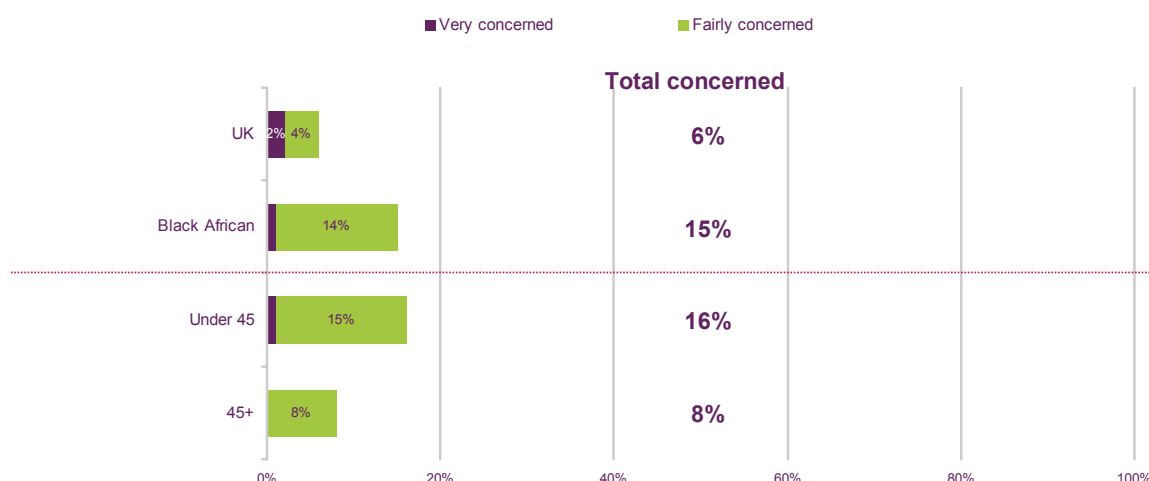
R7 – Can you tell me if you have any concerns about what is on radio? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Concerns about what is on the radio are much more common than among UK adults overall. As detailed previously, Black African adults are more likely to listen to the radio and to believe that radio programmes are not regulated, which may be influencing responses.

When asked to what extent they are concerned about what is on radio, around one in seven (15%) Black African adults say they are either very, or fairly, concerned.

Concerns are more evident among adults under 45 within the Black African adult population.

Figure 224: Extent of concern about what is on the radio



R8 – Overall, how concerned are you about what is on radio?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Although only a minority have concerns about what is on the radio, the extent of concern is much higher than among UK adults in general (6%).

Having any concerns about what is on the radio, and the extent of concern, are therefore more evident among the Black African adult population than among the UK adult population. As stated earlier, listening to the radio at home is more common among Black African adults.

Adults under 45, ABC1s and females are the most concerned about what is on the internet

The majority (65%) have concerns about what is on the internet. Unprompted responses regarding these concerns have been grouped into five themes:

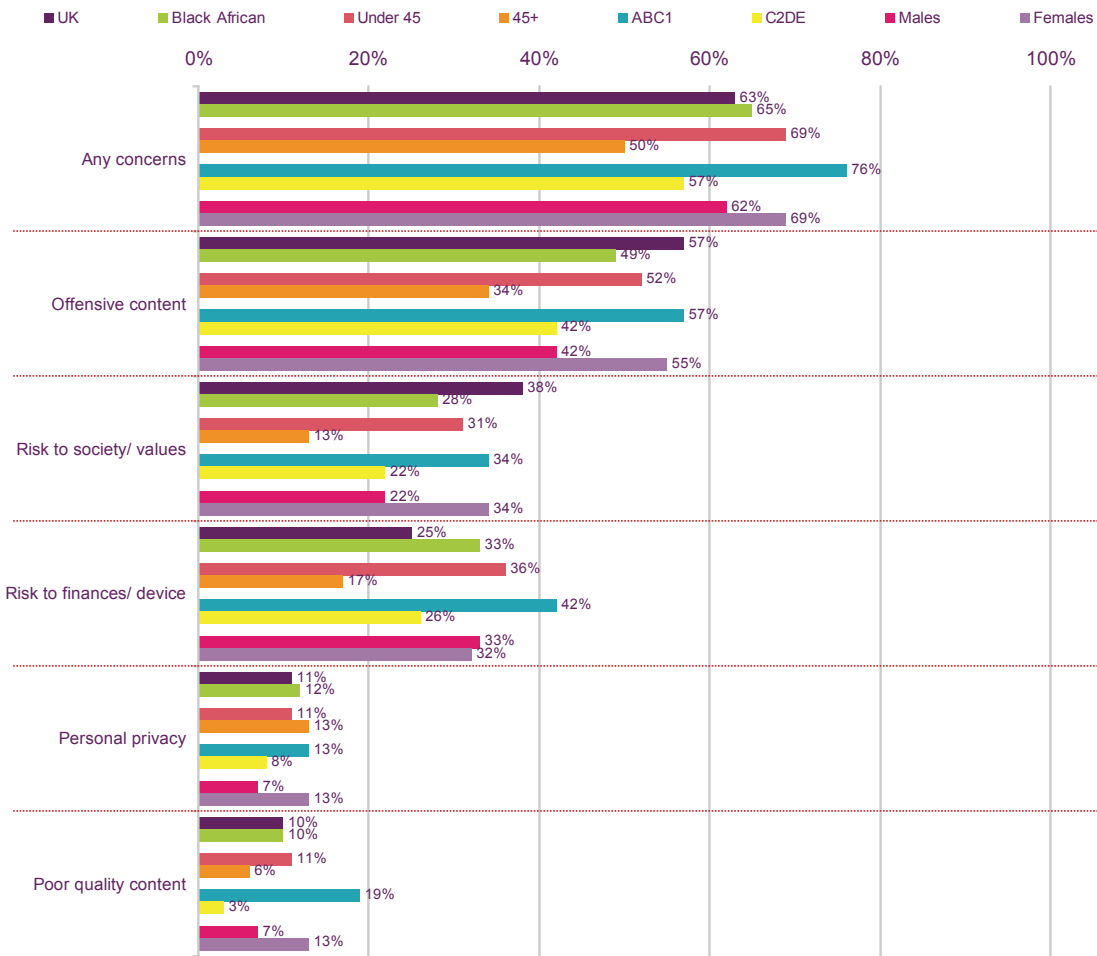
- offensive content - responses such as *sexual content/ pornography, unsuitable for children and violent content*;
- risk to society/ values - responses such as *paedophiles/ perverts masquerading as young people online, websites showing abuse of children, websites instructing how to be a terrorist and websites instructing how to commit suicide*;
- risk to finances/ device - responses such as *identity fraud/ others getting access to my personal detail, computer viruses/ bugs and insecure sites*;
- personal privacy - responses such as *spam/ unwanted emails and claims for money/ phishing emails*; and
- poor quality content - responses such as *pop-up adverts*.

Concerns are dominated by offensive content (49%), followed by the risk to finances/ devices (33%), and the risk to society/ values (28%)

The three most common unprompted concerns about what is on the internet are: paedophiles online, computer viruses, and sexual content/ pornography.

Concerns about what is on the internet are more likely to be mentioned by adults under 45, females and those in ABC1 socio-economic groups.

Figure 225: Concerns about what is on the internet



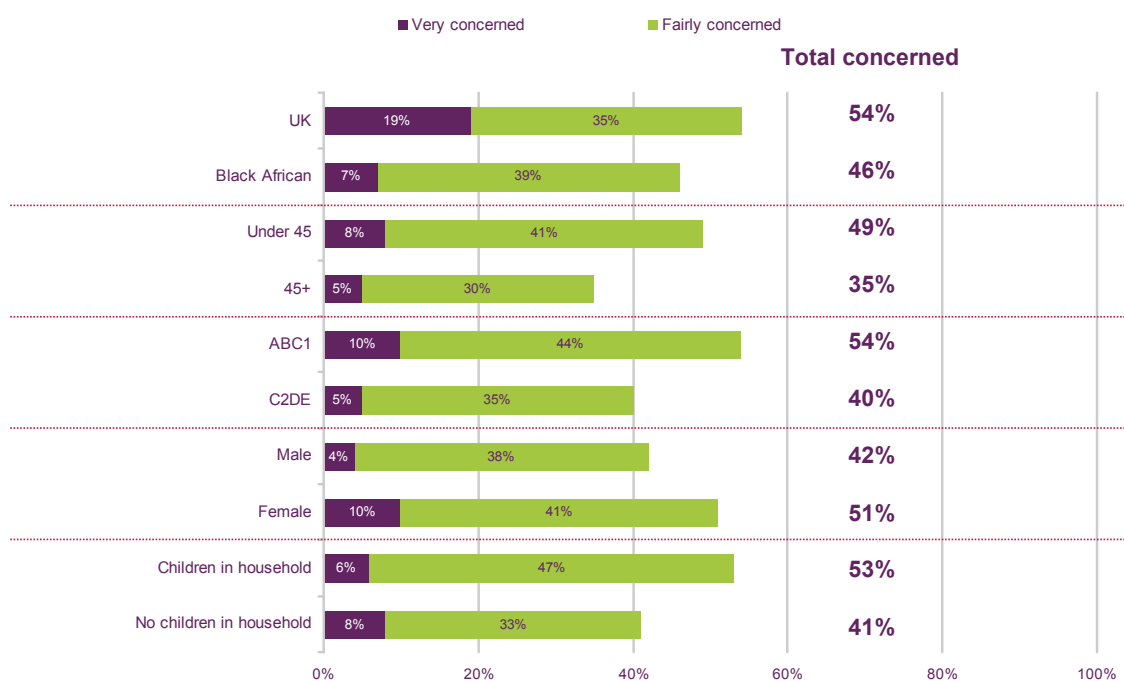
IN36 – Can you tell me if you have any concerns about what is on the internet? What sorts of things are you concerned about?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 143 Black African male, 147 Black African female, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

At the overall level, concerns about what is on the internet are at a similar level as for UK adults overall (63%). Black African adults are less likely to mention concerns about offensive content and risks to society/ values, but more likely to mention concerns about risks to finances/ devices. The higher mentions of risks to finances/devices are driven by mentions of concerns about computer viruses. In comparison, among the population in general there are more mentions of concerns about financial risks.

When asked to what extent they are concerned about what is on the internet, close to half (46%) of Black African adults say they are either very, or fairly, concerned.

The extent of concern about what is on the internet is higher among adults under 45, those in ABC1 households and those with children in the household, with take-up of the internet higher among these groups.

Figure 226: Extent of concern about what is on the internet



IN37 – Overall, how concerned are you about what is on the internet?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 147 Black African male, 153 Black African female, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The extent of concern about what is on the internet is lower than that found among UK adults overall (54%). As the mentions of any concerns were at the same level, these appear to be causing less concern than that experienced by the UK adult population overall.

Concerns about mobile phones is driven by affordability

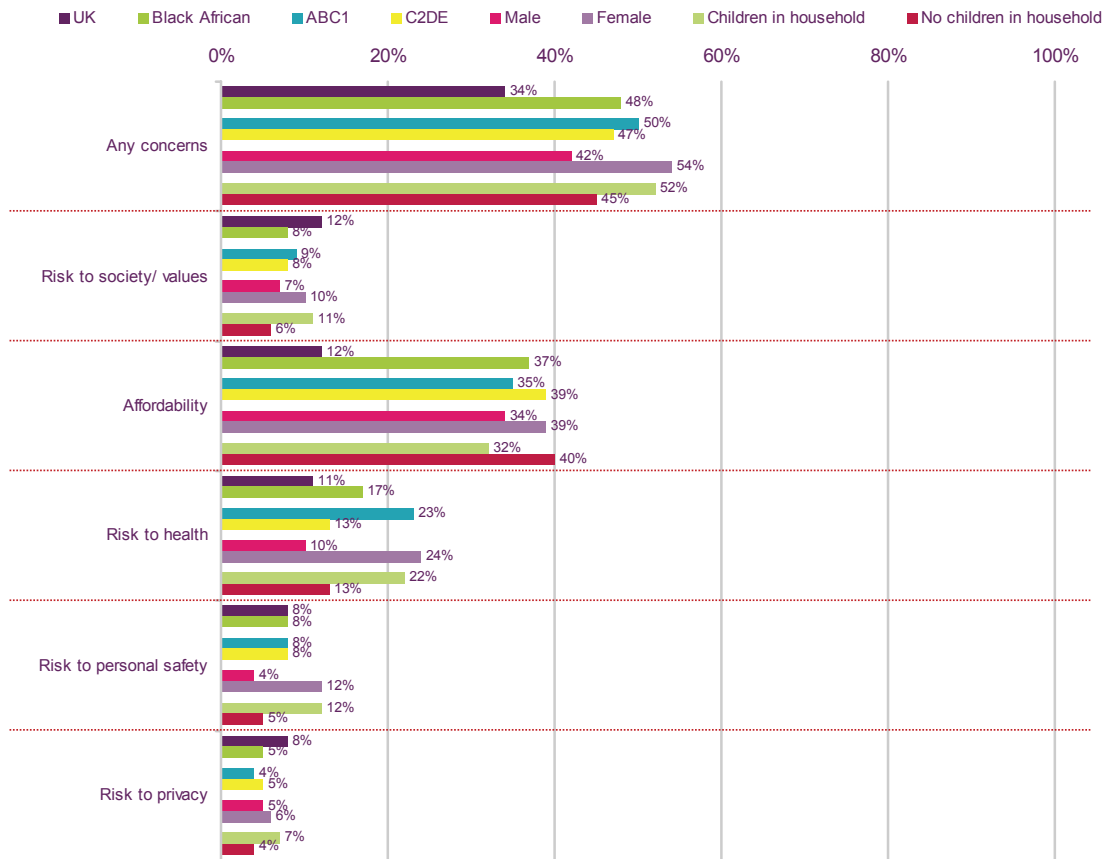
Half (48%) have concerns about mobile phones. Unprompted responses regarding these concerns have been grouped into five themes:

- risk to society/ values - responses such as *misuse of camera phones, happy slapping, children having phones at a young age and paedophiles contacting children*;
- affordability - responses such as *cost of calls generally and cost of calls when abroad*;
- risk to health - responses such as *health concerns using handset and health concerns - masts*;
- risk to personal safety - responses such as *target for theft of mobile phone*; and
- risk to privacy - responses such as *intrusion into other people's space/ public space and junk/ spam text messages*.

Concerns are dominated by affordability (37%), followed by risks to health (17%). The three most common unprompted concerns about mobile phones are the cost of calls, the cost of calls when abroad, and health concerns about using a handset.

At the overall level, there are few differences across the Black African adult population. However, concerns about risk to health are more common among those in ABC1 socio-economic groups, females and those with children in the household, while concerns about risk to society are also more common among females.

Figure 227: Concerns about mobile phones



M5 – Can you tell me if you have any concerns about mobile phones?
 Base: All adults aged 16+ (2905 UK, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 143 Black African male, 147 Black African female, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Concerns about mobile phones at the overall level (34%), and concerns relating to affordability and risk to health, are significantly more common than among UK adults in general.

We do not have any detail on how Black African adults use their mobile phones, but the younger profile and higher interest and confidence in using interactive functions generally suggests a higher volume of use, compared to the general UK adult population.

When asked to what extent they are concerned about mobile phones, one in four (26%) Black African adults say they are either very, or fairly, concerned.

The extent of concern about mobile phones is higher for those with children in the household but does not vary by age. This higher extent of concern could, therefore, relate to the impact on children rather than on the respondent.

Figure 228: Extent of concern about mobile phones



M6 – Overall, how concerned are you about mobile phones?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 127 Black African with children in household, 173 with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

The extent of concern about mobile phones is at a similar level to that found for the general UK adult population (23%). Therefore, despite mentioning more concerns about mobile phones it does not appear that these are causing greater concern than that experienced by the UK adult population.

Concerns about electronic gaming can be categorised as concerns about offensive content and risks to society/ values

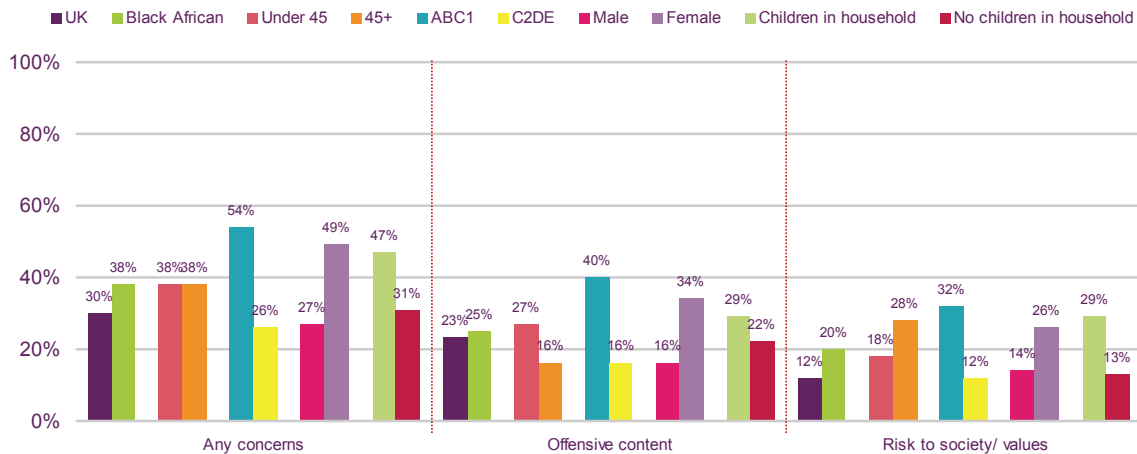
Two in five (38%) Black African adults have any concerns about gaming. Unprompted responses regarding these concerns have been grouped into two themes:

- offensive content - responses such as *violent content, bad language and sexual content*; and
- risk to society/ values - responses such as *unsuitable for children, encourage children to stay indoors and impact on social skills*.

Concerns are broadly equal across these two themes; at 25% and 20%. The three most common unprompted concerns about gaming are: violent content, encouraging children to stay indoors and discouraging creative play for children.

Concerns about gaming are more likely to be mentioned by ABC1s, females and those with children in the household, and so, as with mobile phones, concern appears to relate to the impact on children rather than on the respondent.

Figure 229: Concerns about gaming



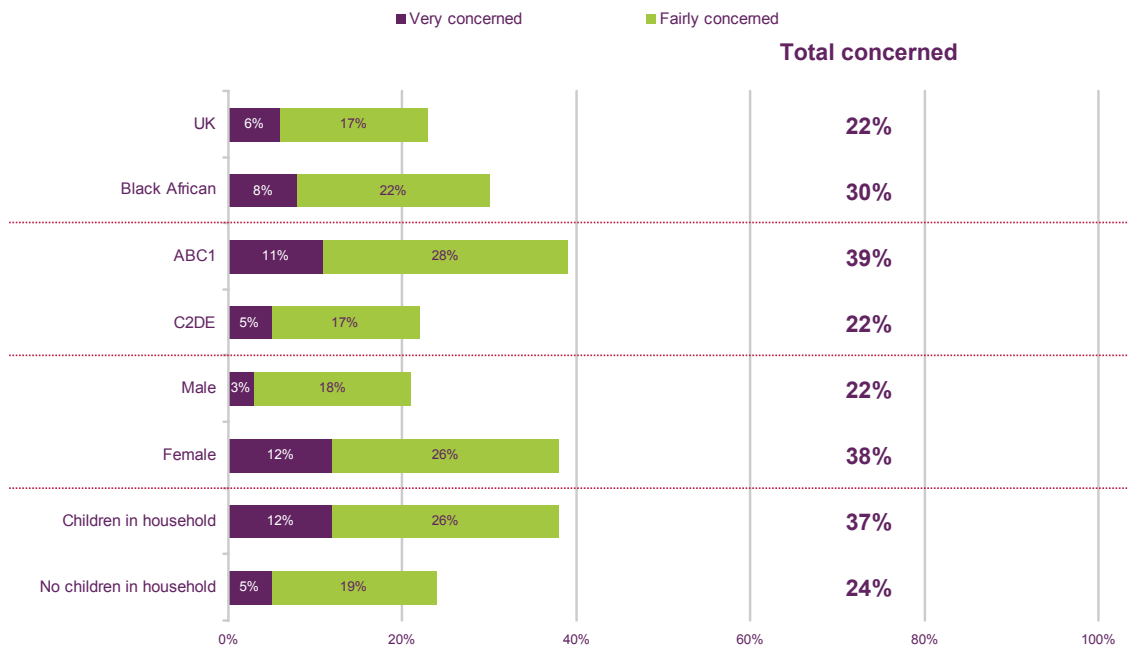
G4 – Can you tell me if you have any concerns about gaming?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 137 Black African ABC1, 154 Black African C2DE, 143 Black African male, 147 Black African female, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

In general, concerns about gaming are higher among the Black African community than among the UK adult population in general.

When asked to what extent they are concerned about gaming, around three in ten (30%) of Black African adults say they are either very, or fairly, concerned.

The extent of concern about gaming is higher among those in ABC1 socio-economic groups, females, and those with children in the household.

Figure 230: Extent of concern about gaming



G5 – Overall, how concerned are you about gaming?
 Base: All adults aged 16+ (2905 UK, 300 Black African, 137 Black African ABC1, 154 Black African C2DE, 147 Black African male, 153 Black African female, 127 Black African with children in household, 173 Black African with no children in household)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

While this is a minority view, the extent of concern is higher than among UK adults (22%).

7.4 Create

Most people are confident creating content and have experience of creative activities

Three in five (62%) Black African adults who use the internet say they are confident in using the creative functions available on the internet and mobile phones, such as creating blogs, editing and sharing photos online and uploading videos from a mobile phone.

Confidence in creating content is higher among males and those without children in the household.

Figure 231: Confidence in creating content



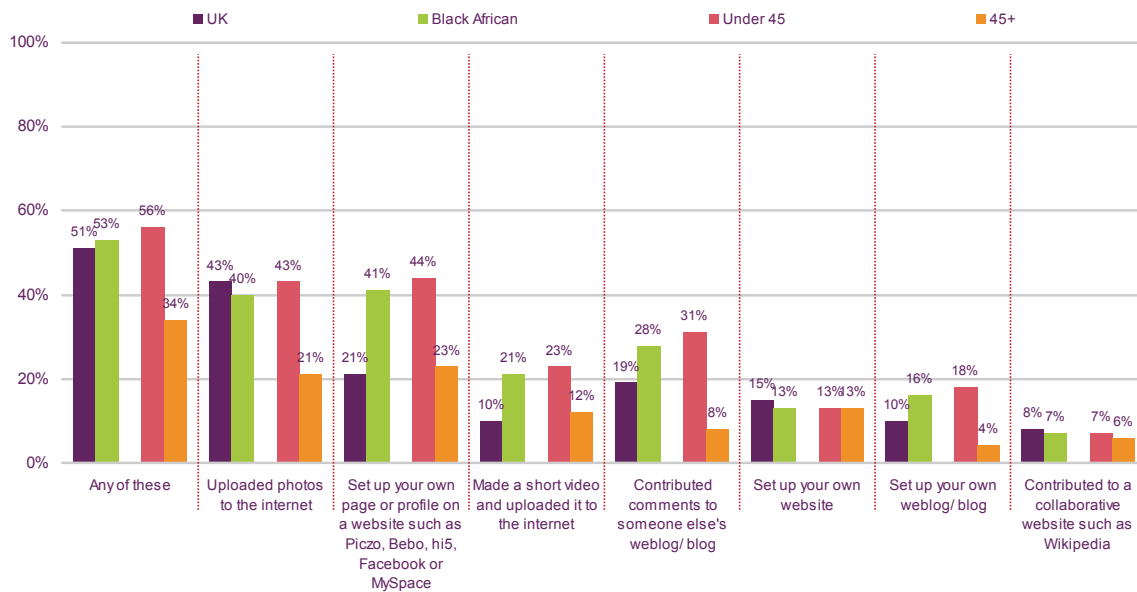
IN10 – How confident are you in using the creative elements that media such as internet and mobile phones offer? This includes creating blogs (or online diaries), editing photos and sharing them with friends and uploading short videos from a mobile phone
 Base: All adults aged 16+ who use the internet at home or elsewhere (1723 UK, 218 Black African, 108 Black African male, 110 Black African female, 92 Black African with children in household, 126 Black African with no children in household) NB LOW BASE SIZE FOR BLACK AFRICAN WITH CHILDREN IN HOUSEHOLD
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

The degree to which Black African adults say they are confident does not differ from UK adults overall, but Black African adults are more likely to give a neutral (neither confident nor not confident) response than are UK adults (25% compared with 9%), and less likely to say they are not confident (11% compared with 24%). The higher than average level of neutral response is consistent with the level of confidence in finding content online, discussed earlier in this chapter.

Half (53%) of all Black African internet users have ever used the internet for particular creative functions; most commonly for creating a social networking site profile or uploading photos to the internet.

Experience is more common among internet users under 45.

Figure 232: Experience of creative activities



IN28A-G – I'd like to read out a number of things people might do using the types of technologies we've been talking about. For each one, could you please tell me if you've done it, or you'd be interested in doing it, or you're not interested in doing it?
 Base: All who use the internet at home or elsewhere (1723 UK, 218 Black African, 156 Black African under 45, 62 Black African 45+) NB LOW BASE SIZE FOR BLACK AFRICAN 45+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

At the overall level, experience of any of these creative functions among Black African adults does not differ from that of UK adults (51%), but there is greater experience of creating a social networking profile, uploading a short video, contributing comments to a blog and setting up a blog.

Two in five have a social networking site profile

Two in five (41%) Black African adults who use the internet have a social networking site page or profile. Of these, broadly equal numbers have a profile on one, or on more than one site, with the average Black African social networking site user having 1.7 profiles.

Using social networking sites is much more common among adults under 45, with just under half (44%) having a page or profile.

Having a social networking site profile is more common among Black African internet users than among UK internet users in general (20%). It is also more common among Black Africans under 45 (44%) than among UK adults under 45 (27%).

The base size for social networking site users among Black African adults is low, and so further details on users are indicative only. It appears that Black African social networking site users are more likely than UK users overall to:

- have a profile on Facebook, MySpace, hi5 or Piczo;
- use social networking sites more frequently; and
- use the sites to talk to people they don't know.

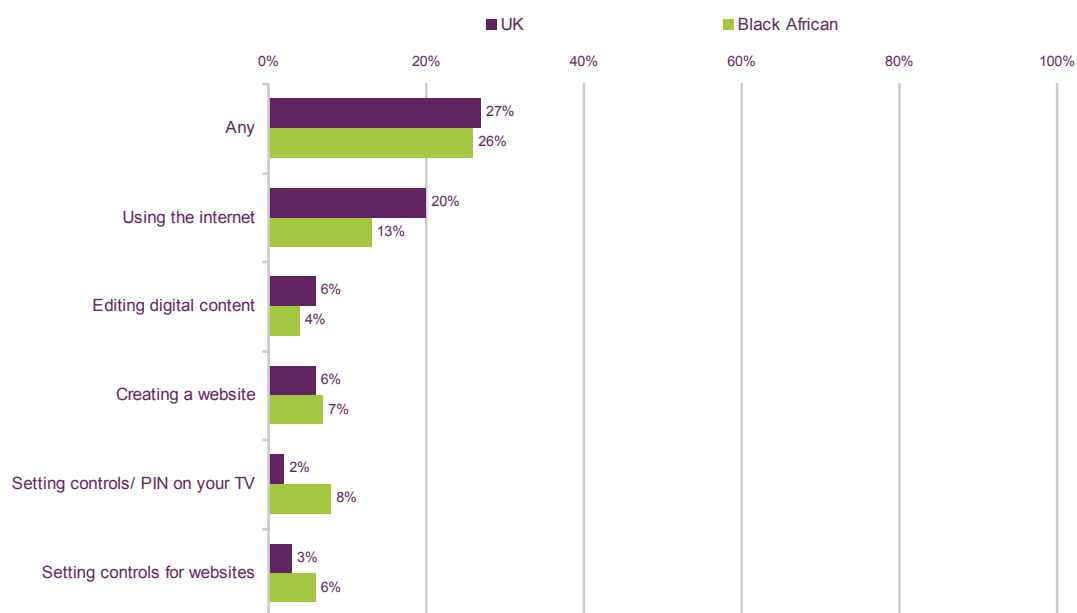
7.5 Learning

One in four have had experience of formal teaching of digital technology

Around one in four (26%) Black African adults have had experience of formal teaching of digital technology, through classes or another type of training, and this has usually been about using the internet.

Unlike the other EMGs, experience of teaching does not differ to any significant extent by demographic profile among Black African adults.

Figure 233: Experience of learning about digital technology



Z9 – Thinking about the types of things you might learn about TV, the internet, mobile phones and so on... Can you tell me which, if any, of these have you learned more about through classes or any other type of training?

Base: All adults aged 16+ (2905 UK, 300 Black African) Shows responses from 5% or more of all Black African adults

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in November to December 2007

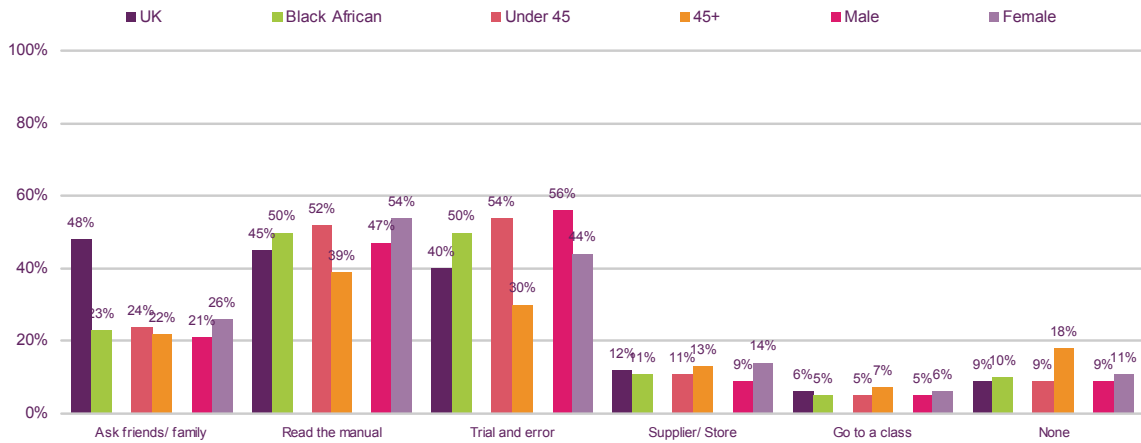
The overall level of experience of formal teaching of digital technology is at a similar level to that found in the UK adult population (27%).

Most have a preference for informal learning

The most preferred options for learning about digital technology are through reading the manual or instructions, and through trial and error. One in ten (10%) do not express any preference for learning.

There are some clear differences within the Black African adult population; with adults under 45 and females more likely to prefer to learn through reading the manual. Adults over 45 are less likely to express any preference for learning about digital technology.

Figure 234: Preference for learning about digital technology



Z8 – We have discussed digital television and radio, the internet and mobile phones. Please tell me which of these are ways you prefer to learn about using such services?

Base: All adults aged 16+ (2905 UK, 300 Black African, 190 Black African under 45, 110 Black African 45+, 147 Black African male, 153 Black African female)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

At the overall level, compared to the UK adult population, Black African adults are much less likely to prefer to ask friends or family (48%), but a similar proportion express any preference for learning (91%).

Annex 1

Research methodology

1.1 Ofcom Ethnic Minority Groups Media Literacy Audit

This quantitative survey was conducted face-to-face in homes.

Sampling

A specialist ethnic research agency was used to conduct 1200 interviews in the home with adults aged 16 and over from the four ethnic minority groups (EMGs) with the highest populations in the UK: Indian, Pakistani, Black Caribbean and Black African. A total of 300 interviews were conducted for each EMG.

Most interviews were conducted in England, as people from EMGs are more likely to live in England than in any other UK nation. Different targets were set for the interviews to be conducted with adults from each EMG; reflecting the age profile and geographical spread according to the 2001 Census. Within the overall quota of interviews to be conducted for each EMG, targets were set to achieve a number of interviews with adults of mixed ethnicity within the group. Again, these targets were based on information from the 2001 Census.

In order to include those whose first language is not English, while at the same time ensuring a consistent approach to the interview, targets were also set for three of the four EMGs to achieve some interviews in the main other languages spoken by the group concerned. These interviews were conducted using translated versions of the questionnaire and the show material used during the interview.

Broadly equal numbers of interviews were conducted with males and females in each age group for each EMG.

Fieldwork dates

Fieldwork was conducted in November and December 2007.

Sample sizes

The final unweighted sample sizes achieved were as follows:

Age

	Indian	Pakistani	Black Caribbean	Black African
16-24 years	73	76	58	64
25-34 years	73	70	59	62
35-44 years	60	55	65	64
45-54 years	51	51	61	62
55+	43	48	57	48

Geographical location

	Indian	Pakistani	Black Caribbean	Black African
London	128	63	179	246
Midlands	89	69	56	12
North	41	108	25	13
South	42	45	40	29
Scotland	0	6	0	0
Wales	0	7	0	0
Northern Ireland	0	2	0	0

Questionnaire and show material language

	Indian	Pakistani	Black Caribbean	Black African
English	210	200	300	225
Punjabi	45			
Gujerati	45			
Urdu		100		
French				25
Somali				25
Arabic				25

Mixed ethnicity

	Indian	Pakistani	Black Caribbean	Black African
Mixed ethnicity	19	19	89	25
Non-mixed	281	281	211	275

Data weighting

The data were weighted to the proportions identified by the Ethnibus survey (a nationwide omnibus tracking survey) conducted by Ethnic Focus relating to age and socio-economic group. The final weighted percentages were as follows:

Age

	Indian	Pakistani	Black Caribbean	Black African
16-24 years	21%	30%	16%	21%
25-44 years	46%	44%	46%	62%
45+	33%	26%	38%	17%

Socio-economic group

	Indian	Pakistani	Black Caribbean	Black African
AB	19%	12%	13%	16%
C1	25%	21%	22%	24%
C2	27%	24%	28%	25%
DE	29%	43%	38%	35%

1.2 Ofcom Adult Media Literacy Audit

This quantitative survey was conducted face-to-face in homes.

Sampling

A sample frame was constructed using postcode geography to reflect the required sample. Sample points were selected with probability proportional to size to ensure a representative sample (allowing over-sampling of Scotland, Wales and Northern Ireland where appropriate). Within each selected sample point, interviewers were issued with a locating address and instructed to work within a set postcode sector. When interviewing, they followed a random route starting at their given address.

Fieldwork dates

Fieldwork was conducted between October and December 2007.

Sample sizes

The final unweighted sample sizes achieved were as follows:

Total	2905
16-24 years	413
25-34 years	473
35-44 years	661
45-54 years	489
55-64 years	341
65+ years	522

Data weighting

The data were weighted back to the correct proportions (to remove the effect of the oversampling). The following matrix was used for the weighting:

Gender – Male 15+	47.9%
Gender – Female 15+	52.1%
Age – 15-34	32.7%
Age – 35-54	34.5%
Age – 55+	32.7%
Social Grade - AB	25.2%
Social Grade – C1	29.3%
Social Grade – C2	18.3%
Social Grade - DE	27.1%
Working Status – working	56.4%
Working Status – not working	43.6%
Region - London	12.1%
Region – South East/Eastern	23.1%
Region – South West	8.6%
Region – Midlands	15.7%

Region – North East	12.1%
Region – North West	11.3%
Region - Scotland	8.9%
Region - Wales	5.2%
Region – Northern Ireland	2.9%

Annex 2

Glossary

AB See socio-economic group

Blog is short for weblog. A weblog is a journal (or newsletter) that is frequently updated and intended for general public consumption.

Broadband A service or connection which is capable of supporting always-on services which provide the end-user with high data transfer speeds.

C1 See socio-economic group

C2 See socio-economic group

Chatrooms A site on the internet where a number of users can communicate in real time (typically, a site dedicated to a particular topic).

DE See socio-economic group

DAB (Digital Audio Broadcasting) A set of internationally accepted standards for the technology by which terrestrial Digital Radio multiplex services are broadcast in the UK.

DVR (Digital Video Recorder) also known as a PVR (Personal Video Recorder).

Digital binary coded representation of a waveform, as opposed to analogue, which is the direct representation of a waveform.

Digital television In the UK, this refers to the provision or receipt of television services other than the main five channels (BBC One, BBC Two, ITV1, Channel 4/S4C, Five) plus local analogue services. 'Digital homes' comprise all those with digital terrestrial television, satellite television, digital cable or analogue cable, or television over broadband. Also used as a noun to refer to a channel only available on digital platforms (or analogue cable).

FM radio Type of modulation produced by varying the frequency of a radio carrier in response to the signal to be transmitted. This is the type of modulation used by broadcasters in part of the VHF (Very High Frequency) band, known as VHF Band 2.

File sharing services The practice of making files available for other users to download over the internet. Usually file sharing follows the peer-to-peer (P2P) model, where the files are stored on and served by personal computers of the users.

Happy slapping A fad in which an unsuspecting victim is attacked while an accomplice records the assault (often with a camera phone).

ICT Information and communications technology

IM (Instant Messaging) Service that alerts users when friends or colleagues are on line and allows them to communicate with each other in real time through private online chat areas.

Internet A global network of networks, using a common set of standards (e.g. the Internet Protocol), accessed by users with a computer via a service provider.

Involuntary non-ownership Where potential consumers are without access to a service but not through choice

Media Literacy Ofcom's definition, developed after formal consultation with stakeholders is 'the ability to access, understand and create communications in a variety of contexts'.

MP3 (MPEG-1 Audio Layer-3) is a standard technology and format for compressing a sound sequence into a very small file (about one-twelfth the size of the original file) while preserving the original level of sound quality when it is played.

MMS (Multimedia Messaging Service) The next generation of mobile messaging services, adding photos, pictures and audio to text messages.

Profile The personal homepage on a social networking site, usually including information about a user, photos, and their friend list. Profiles form the basis of social networking sites.

Phishing a type of online fraud that attempts to deceive users to disclose sensitive personal information such as a password or credit card number. The deception typically takes the form of "spoofed" emails from well known banks, trusted online retailers and credit card companies. The message in the email trick users into visiting a malicious web site, where the user divulges the sensitive personal information.

PSB Public Service Broadcasting

Pop-ups Pop-up ads or popups are a form of online advertising on the World Wide Web intended to attract web traffic or capture email addresses.

SMS Short messaging service

Socio-economic group (SEG) A social classification system, classifying the population into social grades, usually on the basis of Market Research Society occupational groupings (MRS 1991). The groups are defined as follows;

- A.** Professionals such as doctors, solicitors or dentists, chartered people like architects; fully qualified people with a large degree of responsibility such as senior civil servants, senior business executives and high ranking grades within the armed forces. Retired people, previously grade A, and their widows.
- B.** People with very senior jobs such as university lecturers, heads of local government departments, middle management in business organisations, bank managers, police inspectors, and upper grades in the armed forces.
- C1.** All others doing non-manual jobs, including nurses, technicians, pharmacists, salesmen, publicans, clerical workers, police sergeants and middle ranks of the armed forces.
- C2.** Skilled manual workers, foremen, manual workers with special qualifications such as lorry drivers, security officers and lower grades of the armed forces.
- D.** Semi-skilled and unskilled manual workers, including labourers and those serving apprenticeships. Machine minders, farm labourers, lab assistants and postmen.

E. Those on the lowest levels of subsistence including all those dependent upon the state long-term. Casual workers, and those without a regular income.

Social Networking Site (SNS) A site which allows users to create a personal page or profile and construct and display a social network of their online contacts.

Spam Unsolicited "junk" e-mail sent to large numbers of people to promote products or services.

UGC User-generated content.

Voluntary non-ownership Where potential consumers are without access to services, primarily due to a perceived lack of need for a service or satisfaction with using alternative methods.

Wiki Software that allows registered users, or anyone, to collaboratively create, edit, link, and organize the content of a website, usually for reference material.