



## **Ofcom and research**

Alison Preston, Head of Media Literacy Research, Ofcom-UK

EPRA: research and regulators session

14 May 2015

# The role of research at Ofcom



**Statutory duty to ascertain the state of public opinion/the experience of consumers**  
**Statutory duty to publish and take account of research**  
Communication Act 2003 Part 1 (14 and 15)

**We will be informed through high quality research and information, which we will share widely**  
Ofcom strategy statement, Annual Plan, 2014-15

“It shall be the principal duty of OFCOM, in carrying out their functions –

- (a) To further the interests of **citizens** in relation to communications matters; and
- (b) To further the interests of **consumers** in relevant markets, where appropriate by promoting competition.”

Section 3(1)(a) and (b) of the Communications Act 2003

# Who we are and what we do



## Market Research

### Continuous research

- Tracking surveys
- Provides us with consistent data to enable us to monitor change over time

### Ad-hoc research

- Topics covered reflect Annual Plan priorities and support the work of Ofcom teams
- Around 30-40 projects each year, ranging in value from c.15,000 – 200,000 euros

## Market Intelligence

- Monitors and interprets market developments and industry trends, at company, sector, UK and overseas levels
- Industry-standard audience measurement (BARB, RAJAR, ComScore)
- Collects and analyses information from industry – directly and indirectly

## Some numbers

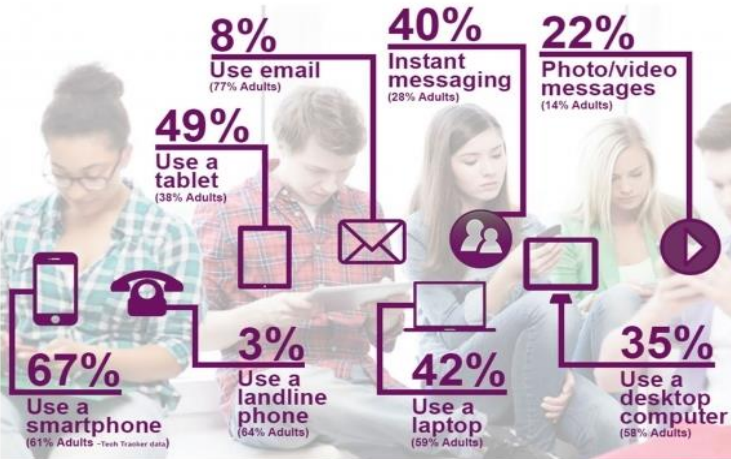
- Interview about 100,000 people each year
- Budget: £5.25m in 2013/14
- Staff: c.30 across both teams
- 41 reports published in 2014 (plus 47 publications of official statistics)

# Communications Market Report (CMR)



Ofcom has a duty to report annually on the state of the UK communications market. The Communications Market Report is our flagship annual publication.

## Techie teens shape how we communicate



## Average "Digital Quotient" score by age



Take the test:  
[www.ofcom.org.uk/cmri](http://www.ofcom.org.uk/cmri)



### Middle-aged? Hand over that smartphone to a six-year-old

It might seem like a bit of a stretch, but a new study shows that six-year-olds are as savvy as adults when it comes to using smartphones. In fact, they are better at it than many adults are.

### How's your DQ? Test shows six-year-olds outsmart adults in digital knowledge

Smartphones can use adults before they can talk. Digital natives are the envy of all those who grew up without one.

### Are you baffled by technology? Ask a 6-year-old

They know more than 45-year-olds. A new study shows that six-year-olds are better at using smartphones than many adults are.

### Whizkids at age six

It's not just the adults who are better at using smartphones. Six-year-olds are better at it than many adults are.

### Media time overtakes hours spent asleep

UK adults spend more time in front of screens or on the phone than they do sleeping. TV - we spend an average of 11 hours a day using new technology, an increase of two hours since 2010.

### More screen time than sleep!

UK ADULTS spend more time in front of screens or on the phone than they do sleeping. TV - we spend an average of 11 hours a day using new technology, an increase of two hours since 2010. However, the research also showed that the time spent watching TV has fallen. Last year we spent an average of three hours and 52 minutes a day in front of our television set. In 2012 the average was four hours and one minute. It was the first time since 2009 that TV viewing has fallen below four hours a day.

### We spend more time using technology than sleeping

UK ADULTS spend more time watching TV, using their mobile and on the computer than they do sleeping, according to new research. The study, by communications regulator Ofcom, found that the average UK adult spends more time using technology for eight hours and



# International Communications Market Report (ICMR)



- Published each December
- Compares the availability, take-up and use of services in the UK and 17 comparator countries –
  - France,
  - Germany,
  - Italy,
  - the US,
  - Japan,
  - Australia,
  - Spain,
  - the Netherlands,
  - Sweden,
  - Poland,
  - Singapore,
  - South Korea,
  - Brazil,
  - Russia,
  - India,
  - China and
  - Nigeria
- Subset of 9 countries for consumer analysis

# Media literacy research

## Statutory duty to promote Media Literacy

Media literacy research illuminates the roles that the media play in people's daily lives. We place particular emphasis on attitudes and understanding.

Our research covers a range of areas including digital inclusion and participation; privacy and safety online; understanding of personal data; opinions on regulation and norms of use; media in everyday life; online citizen activities; children's media consumption and attitudes.

### Adults media use and attitudes report

### Children and Parents' media use and attitudes report

### Adults Media Lives

### Children's Media Lives

- Since 2005
- c.6,000 respondents in total each year
- Range of questions across platforms

- Qualitative/ ethnographic video interviews
- Since 2005 (adults)
- Since 2014 (children)
- c. 18 in each sample

# Our range of research publications



Some of our other regular reports....

**Media Tracker**

**CMR reports for  
Scotland, Wales  
& Northern  
Ireland**

**Internet Citizens**

**The Consumer  
Experience  
Report**

**The Digital  
Radio Report**

**UK fixed/mobile  
broadband  
performance**

**PSB Annual  
Report**

**News Report**



# Core principles



Independence

Range of methods

Trends over time

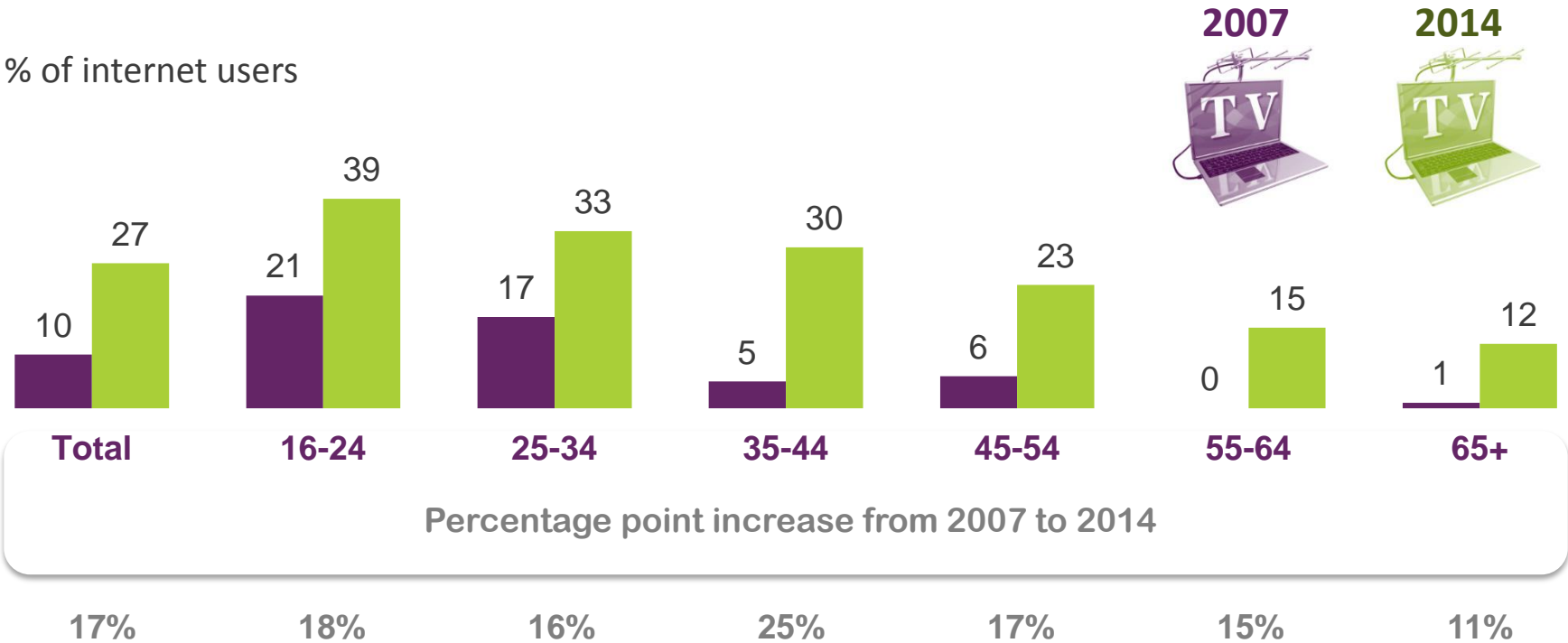
Flexibility

Stakeholder engagement

# Viewing TV/films online, over time



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



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

For more information ...

---



[www.ofcom.org.uk/marketresearch](http://www.ofcom.org.uk/marketresearch)

[www.ofcom.org.uk/medialiteracyresearch](http://www.ofcom.org.uk/medialiteracyresearch)

[alison.preston@ofcom.org.uk](mailto:alison.preston@ofcom.org.uk)