Orange Internet Age Study

Introduction from Christèle Delbè

Education plays a key role in any community, bringing it together and encouraging an appreciation and understanding of the wider world.

With increasingly complex services now available through mobile phones, including online gaming and social networking sites and, with the advancing capabilities of the internet, it's important people learn to use our services in the safest and most responsible way. We believe it is important to educate, not just our customers, but everyone who uses the internet; and that's why we have put together a series of educational initiatives and resources to guide safe and responsible use of our products and services, and help children and students to broaden their skills.

Orange works directly with schools and teachers to raise awareness of safety issues and has developed educational programmes for schools to teach children about phone safety, including educational resources that directly address mobile phone theft and cyberbullying, as well as a new resource that raises debate around social networking on the internet.

However, the world of technology is ever changing and the notion of a generational digital divide - where kids are more experienced internet users than their parents and teachers is increasingly common. While many of our programmes are designed to help protect and educate children and students, it is clear other, bolder initiatives are needed if we're to help bridge this gap.

In March 2008, we launched www.myinternetage.com, a site that evaluates the amount of time you spend online, what kind of sites you visit - and how often you visit them - plus your exposure and attitude towards online safety.

The site was developed in partnership with Dr Jo Bryce from the University of Central Lancashire's Cyberspace Research Unit to quantify the different generational attitudes to the Internet and, for the first time, put hard figures against how people of different ages use the web - defining the 'digital divide'.

The information from the site has been used to help us create a new internet safety education module which will be used in schools across the UK in the 2008/9 school year.

Almost 40,000 people participated in the 'Internet Age' study, making this the largest ever study of its kind into how Britons use the internet. In addition to analysing the detailed responses, Orange ran focus groups with over 100 school children and disadvantaged youth groups to help contextualise the findings and provide additional insight into children's and students' experience and perception of the digital divide.

This study provides a top line summary of the Internet Age research study[1] and lays out the initiatives Orange is introducing to help bridge the divide. We will also be taking this opportunity to engage with a wide range of stakeholders who have expertise in this area to help shape our thinking for future initiatives.

We hope you find it of interest

Christèle Delbè

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[1] Based on analysis of the first 24,000 responses.

TOPLINE FINDINGS:

- Under 16s are more experienced at using the internet than older adults, particularly older parents
- Many parents don't understand what their kids do online and are often unwilling to find out
- Many older users and parents do not use the online services most popular with young people and find them difficult to use (e.g. social networking, chat and IM)

Under -16s….

- are less likely to disclose personal information online than people aged between 20 and 40
- three quarters have met up offline with people they first encountered online
- nearly half have blocked someone in the last six months
- one in three have been victims of cyberbullying
- one in eight have been in contact with someone online and found they weren't who they said they were
- one in ten have reported someone to a service provider or the police

But…
- are twice as likely to upload images of themselves compared to parents aged 41-60
- are twice as likely as parents aged 41-60 to talk to someone they don't know online
- are twice as likely to have had someone talk to them about things that make them feel uncomfortable as parents aged 41-60

THE INTERNET - WHAT PEOPLE DO AND HOW THEY BEHAVE:

The Orange Internet Age study looked at internet use across the UK, quizzing almost 25,000 respondents on what they do online, why they do it, how comfortable they feel online and their awareness of, and reaction to, online safety messages[2].

By developing a unique way of evaluating an individual's experience and giving them an 'Internet Age', the research paints a very real picture of the 'generational digital divide.'

The study clearly demonstrates that internet experience decreases with age, with 16-20 year olds being *the most advanced internet users, followed by under-16s. Older users are less experienced.*

The research showed similar 'gaps' in how often and easy different age groups found using new technologies. Given the test was hosted online, a tech-savvy audience was more likely to respond - indicating the 'real-world' digital divide is actually much more pronounced.

Under-16s and 16-20 year olds are the most prolific users of all aspects of internet technology, with younger internet users frequently uploading and downloading content, chatting and using IM, VOIP and IM to communicate with friends and acquaintances.

These new technologies and services were the ones that older respondents found most confusing - with social networking sites, chat, and the uploading and creation of content a particular source of confusion for many.

The research also examined differences between under-16's and respondents with children aged under-16. For those parents in the sample aged 41-60, the results suggested that:

- 65% have never accessed a social networking site - of those that had, one in four (22%) found them difficult to understand
    - o 65% of under-16s use social networking sites at least once a week

- Over three-quarters (76%) had never used chat - of those that had, one in five (25%) found it difficult to use
    - o Two in five (39%) of under-16s use chat at least once a week

- 70% have never created content - of those that had, one in three (33%) found it hard to do
    - o 64% of under-16s create content at least once a week

Despite this lack of experience and understanding, the role parents play in providing safety advice is undeniable:

- 62% of parents tell children not to use chat[3]

- 86% tell them not to give out any personal information[4]

Parents are worried by their children's online activities, with approximately three quarters of parents of 11 - 15 year olds fearing their children will come across inappropriate content[5].

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[2] This refers to both the quantitative and qualitative phases of the project
[3] *Livingston and Bober, 2005, UK Children Go Online*
[4] *Livingston and Bober, 2005, UK Children Go Online*
[5] *Ofcom, 2006, Media Literacy Audit*

DISCLOSING PERSONAL INFORMATION:

Younger people are often criticised for disclosing personal information online and, therefore, putting themselves at risk. However, the Orange Internet Age study found that *under-16s are less likely to post personal information about themselves online than people aged between 20 and 40.*

75% of people said they had never disclosed personal information online (70% for under-16s). However, 25% had disclosed once or more, and on average, men are significantly freer with personal information than women. For example, of those who had disclosed personal information 1-5 times, 25.5% were males aged 21-30 years old and 10.1% were females.

Young people in the focus groups showed a high level of awareness of the risks associated with putting information online and the potential lack of control over who could access it.

"If you give out personal information like your phone number, people could ring up and pretend to be someone else... you could be in danger"

They also drew distinctions between the information required to sign up to a service and other, more personal details. The also highlighted the centrality of disclosing information to many online services, particularly social networking.

"On Bebo you kind of have to put stuff about yourself, or else there's no point really being on there."

UPLOADING IMAGES:

However, despite 75% of the sample not disclosing personal information such as addresses and phone numbers, over half (52%) have uploaded images of themselves, with one in ten (9%) doing this more than 15 times.

Under-16s are less likely to upload images of themselves compared with 21-40 year olds, though many focus group participants did not view uploading images of themselves or friends as giving away personal information.

Despite recent safety campaigns urging young people to think carefully before uploading images of themselves to websites, these messages are failing to resonate with some young people.

Focus group participants made distinctions between the general principle that uploading pictures was not a good idea, particularly for younger children, and their own behaviour. They felt that images played an important part in evaluating the trustworthiness of people they are in contact with online.

Before they engage with someone they have never met online, many focus participants said they try to work out whether they are genuine, and that personal images play an important role in this process. As images are a valuable way of developing an online identity, participants felt that people who shy away from disclosing such information are suspicious and untrustworthy. Users with a variety of different pictures are seen to be more trustworthy in terms of their identity.

"You can tell when someone is genuine because they'll have loads of photos on their page, you can tell from the friends list as well. Say it was a lass, she'd have loads of lads on her friends list....you can tell when people are fake"

ONLINE CONVERSATIONS (WITH UNKNOWN PEOPLE):

The conversations kids have online are typical of those you'd expect to hear in any playground - school, music, boys and girls, going out, shopping. Conversations typically involve people they know from school, but with MySpace and Bebo forming new, online communities, geographical proximity is no longer a defining factor when deciding who to talk to - no matter how old you are.

Over a quarter of the sample (27%) have talked to someone they didn't know previously online, with this figure rising to *over one in three (37%) under-16s.*

Men were more likely to engage in this behaviour than women. For example, of those who had spoken to someone online that they didn't previously know more than 15 times, 46% were males aged 21-40 years old and 11% were women.

One in eight (12%) internet users have had someone talk to them about things that made them feel uncomfortable, with the frequency of this experience being higher in younger age groups– (e.g., 24% amongst under-16s).

8.2% of the sample had found out that someone they had been in contact with online wasn't who they originally said they were, with this proportion increasing to 13% in the under-16s.

"There are some really sick people, they add you and they tell you 'Right, will you do this for me on webcam or do that on webcam for me?' It's like 'No, go away you sicko…'"

"Somebody recently had the same name as one of my friends, but it was someone else, a man, and he was sending me pictures. It kind of scared me, but I just blocked him and deleted him and it wouldn't let him on any more…"

45% of under-16s had blocked someone in the last six months, and one in ten (10%) had reported someone to a service provider or the police.

ONLINE CONTACT GOES OFFLINE - MEETING UP WITH PEOPLE OFFLINE[6][7]:

Online dating, fan forums and the growing popularity of Facebook for organising social events means nearly half the sample (44%) have met up with someone they first met online one or more times[8].

One in four (25%) of the sample had met someone offline that they met online 1-5 times, with one in twelve (8%) meeting up on more than 15 occasions.

Meeting people offline is typically more popular with younger internet users - with *three quarters (73%) of under-16s meeting up with people they met online*[9][10]. The frequency of meeting offline declines with age, but a high proportion of older users are also engaging in this behaviour (e.g., 55% of 21-30 year olds).

Skins parties and sites like Myspace and Bebo, which many kids use to organise their social lives, means this figure is not necessarily a sign of young people going into dangerous situations - it's how they make new friends - and younger respondents were fully aware of the risks involved.

When quizzed further in the focus groups, many participants said meeting someone offline was dangerous and inadvisable, while others felt it could be justified as long as sufficient precautions were taken. These included taking friends to any meeting and making sure someone was aware of where and when the meeting was taking place.

Some participants also said if they had spent time getting to know someone online, were sure they were who they said they were, and were confident they could be trusted, meeting offline should not be a problem.

"I've met loads of people through Bebo. Just talked to them on MSN and Bebo then actually gone to meet them."

"Yeah, yeah, I've gone to Manchester to meet people and Preston - better than staying in Morecambe all the time."

The young people in the focus groups were aware of this risks associated with this behaviour, though they were less able to recall where they had heard specific messages. However, there was some specific mention of adverts and TV programs dealing with the issue (e.g., Panorama and the Home Office adverts about identity deception and potential sexual exploitation).

However, many kids - while aware of the problem - had a real feeling of "it's not going to happen to me." They knew the risks of disclosing personal information online and meeting people offline, but many did not feel it was a problem which applied to them.

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[6] The study did not use the term 'stranger' when examining online interactions or offline meetings. The terminology used here more adequately reflects the way people talk about the people they meet offline. Many young people do not conceptualise the people they interact with online or meet offline as strangers, which is problematic given the way in which 'stranger danger' is discussed in the media and everyday conversation. These differences in conceptualisation are a challenge in developing educational strategies for young people, particularly as when meeting offline, they are likely to perceive the person they are going to meet as a friend or 'friend of a friend' regardless of how they first met online.

[8] It is also important to note that there were no subsequent questions about the outcomes of these meetings in the quantitative research, so the proportion of these offline meetings which resulted in positive or negative outcomes is unknown. However, the qualitative research suggested that offline meetings generally did not lead to negative outcomes in this sample.

[9] Although this figure may seem alarmingly high, the results should be evaluated within the context of the wording of the specific item which asked participants how frequently they met people offline. They were not asked how frequently they met strangers or friends of friends separately, so the results potentially represent offline meetings with a mixture people that participants had differing previous levels of interaction with - as discussed in the focus groups.

[10] See point 4. The sample size for <16's in the data set was N = 535.

SCARED BY THE INTERNET - CYBERBULLYING AND ADULT CONTENT:

A worrying one in five (20%) respondents had been 'scared' by something online, with people between 21 and 40 experiencing this most often. The study showed men tend to be frightened by online content more often than women. Of people scared by online content one to five times, one in four (26%) were men in the 21-30 age group, compared to one in ten (10%) women.

However, when you look at under-16s, fewer than one in ten (8%) reported being scare d by content online. The major concern for focus group participants was seeing violent and sexual online content - happy slapping clips on YouTube were highlighted, along with chain emails that require the participants to forward them on to a number of friends or something terrible would happen.

"I tell you what else is bad, it's "happy slapping" - when somebody takes a picture and puts it on the internet, or a video and puts it on YouTube"

"There was this story about this guy who never sent it and the next day, his mum died in a car crash, his dad exploded, and the next day he went to school and he got knocked down on his bike..."

Moderator: *"And do you think that's a completely truthful story?"*

"No, well he might have got knocked down but....I didn't send one and I didn't die"

Cyberbullying and abusive communications were of more concern to focus group participants than inappropriate contact and potential sexual exploitation.

Just over one in eight (12%) of the sample had encountered harassment online. *For under-16s, this figure rose to over one in four (29%),* with comments on profile pages and MSN the most frequently mentioned problems in the focus groups.

"Everyone gets hassled....there's always people giving you jip, there's always a few people on MSN you absolutely hate...."

Many boys talked about bullying and harassment occurring quite regularly when playing games online and pointed to potentially racist comments being made frequently when playing with gamers of different nationalities.

The Byron Review Action Plan outlined a number of steps designed to make gaming safer, but the use of in-game chat to bully, intimidate or racially abuse other gamers was noticeably absent.

However, a major concern for young people in the focus groups was someone obtaining their social network log-in details and password, and making nasty comments in their name. The ability to wreck someone's profile and their online identity in this way appeared to concern some participants more than receiving nasty comments, texts or emails directly.

"If you ruin someone's Bebo (profile), it's like someone's life"

Most of the focus group participants knew the most effective ways to deal with such problems, despite few of them mentioning receiving education about Cyberbullying from their parents or the schools where such behaviour was experienced.

The focus was strongly on dealing with this type of problematic online behaviour themselves or using a peer support network to find out ways to prevent problems reoccurring.

"If someone comments you on Bebo and you don't like it, just block them... there's no point arguing with them"

THE INDUSTRY'S ROLE - SAFETY MESSAGING AND AWARENESS:

A significant part of the focus group activity conducted with young people centred around their awareness of safety messages, how useful and relevant various safety messages were to their online experiences and behaviours, and how best to raise awareness of internet safety issues amongst an audience that is, traditionally, very difficult to get to do anything they don't want to.

The majority of young people in the focus groups had a high level of awareness of safety messages, but were unable to recall where they originated or might have seen them, apart from some who remembered the Home Office advert and Panorama programme.

"There was a video on YouTube and it was about this little girl that met this guy, and she ended up dead, because she met up with him, and at the end it had a message but I've forgotten what the message was…"

Despite this, there was a high level of awareness about safety issues relating to disclosure of personal information, meeting offline, image sharing online and experiencing Cyberbullying among the focus group participants. Many participants also remembered messages related to security, viruses and disclosing credit card details

This suggests that, whilst specific campaigns or adverts go unremembered, they still have an important influence on the online behaviours and experiences of young people. This is further demonstrated by the general agreement that the majority of the safety messages offered good, sensible advice, particularly for younger users. However, there were some variations in opinions and evaluations according to age.

Whilst the majority of younger children found all safety messages useful and said they provided good advice, older kids preferred to draw on their own online experiences to anticipate situations. They felt that safety advice was less relevant to them, and felt there were often situations in which the behaviour advised against could be acceptable, as long as the risks were recognised and precautions taken.

These young people were more likely to claim that safety messages had little impact on their own behaviour because they felt that they had the skills and confidence to keep themselves safe online.

"if you wanted to give out your personal details out on the internet you can, whether you've read about internet safety or not…"

A PARENT'S ROLE:

The focus groups found that friends and peers are the most popular source of assistance, support and information when kids encounter problems or issues online, with family members often criticised for failing to take an interest in their online activity or not understanding what they're doing online.

"They think we're irresponsible and we'll just talk to anybody but we're actually not that stupid"

Many felt frustrated by the lack of parental understanding of the Internet and online communication, which they felt caused their parents to be unnecessarily concerned about their online behaviour. Some participants also felt media and news coverage of incidences where negative things had happened to young people online unnecessarily increased parental concern about their online safety.

"My mum's always freaking out that I'm talking to someone I don't actually know…"

"Yeah they don't understand you have to accept them and they have to add you…..that's what they don't understand…"

This lack of understanding is one of the major reasons for the launch of Orange's new online safety initiative aimed at parents. In order to better protect the younger generation, parents need to understand what their kids are doing online and be more aware of the risks.

"I think if they saw the internet from our point of view they wouldn't worry as much. They think about what the media says, which makes it out to be worse than it actually is"

WHERE DO WE GO FROM HERE?

Conclusions and commitments from Christèle Delbè

We appreciate that the idea of a 'generational digital already exists and there is a great deal of commitment from the industry to help bring parents up to speed with technology and understanding what their kids are doing online.

Orange launched this study to ascertain just how far the generational digital divide went so we could potentially offer additional help to parents. As a broadband provider in an age where mobile and fixed internet is converging, Orange is well placed to provide guidance and advice in this area. We also feel very strongly that, as a responsible company, we have a duty to ensure the services we provide are being used safely.

However, the scale of this study unveiled a number of additional insights that were unexpected and we feel that, as well as reporting them and engaging with stakeholders, we ought to look at ways to address them.

The generational digital divide

Our primary output as a result of this research is to help bridge this divide.

The parent-training module is being developed by Orange's education advisors and is aimed at increasing parental awareness of what kids are doing online. A greater awareness of the sites and services being used and their respective risks will help parents take greater responsibility for keeping their kids safe online. This new module aims to bring kids and parents together, aiding mutual understanding.

Commitment: The Orange 'Parent Training' Module will be trialed in schools in London and Bristol in the 2008/9 term and made available to all UK schools soon after.

Risk awareness & posting personal information

The study shows kids are more aware of the dangers and how to protect themselves than we have perhaps given them credit for. However, since this has not stopped some of them disclosing personal information, Orange will look at how to address the "it won't happen to me" culture. There seems to be a subjective view of what is considered 'personal information' and many kids believe pictures don't fall into this category and, more disturbingly, they trust others based on the volume of pictures they have posted. Clearly there is also a need to address the "open isn't necessarily honest" issue.

Some suggested approaches here might be to:
- Praise the fact that kids have a good all-round awareness
- More clearly define what is considered 'personal information'.
- Drive home the point that pictures, even without information, can be dangerous.
- When is it OK to post personal information?
- What are the consequences?

In our existing educational resources, we have always tried to engage in debate rather than preach dos & don'ts, believing this is the best way to get kids to listen. We have to appreciate social network sites and online chat are an integral part of how kids communicate with their peers - we should support this and provide them with the tools to make sound judgements about what is safe, rather than preach against it and discourage kids from using social networks.

Commitment: To review our existing materials and look at ways to enhance them to include the above points. To re-promote this to schools through our existing channels and to look at other potential channels to engage kids on the issue.

Making contact with people offline

When it comes to contact with people offline, while much of this may be genuine, kids need to know what to look out for and recognise potential dangers. With such a high number of people meeting people offline, it appears the "it won't happen to me culture" exists here too.

One insight might be that people view the issue of "talking to strangers" very differently to that of talking to people online. For example we noticed people in their 20's and 30's frequently talked to people they didn't already know online, but there was little concern about safety as they're adults and are naturally more aware of the dangers. Is there a difference of opinion about what constitutes talking to a stranger? For instance, many of us contribute to online debates, blogs and discussions where there is no intention to get to know someone beyond that forum – but technically we are still talking to 'strangers'.

The issue is, of course, where people take it a step further and agree to meet people offline - quite often it's the younger age groups engaging in this.

We feel further research is needed that's directed specifically at those who have met, or regularly meet people offline to get a better insight into what they are doing and why they are doing it. Is it right to assume meeting offline is automatically a negative thing when some meetings could be legitimate and friendly?

Commitment: Orange has not addressed the issue of meeting offline in any existing education material. We propose to set up initial discussions with relevant third parties, law enforcement and regulators to start this process and try to come up with some ideas about how we can work together to talk to kids about the need to exercise care when talking to strangers online, and the dangers of agreeing to meet up with people offline.

Cyberbullying and harassment

Chain e-mail threats and Cyberbullying is still a major issue for under-16s. Bullying via internet chat rooms and mobile phones has been covered in our Incoming Message DVD and Safety Online as well as in our printed parents guide (What Parents Need to Know) but this is no reason to rest on our laurels and claim we have addressed this as best we can. Despite many organisations doing good work in this area, it's clearly still a major concern for kids who feel harassment can follow them from the school gates and into their homes. 'Happy Slapping' remains a problem and posting videos of bullying and crime seems to have become a regular feature on some internet sites.

Commitment: We'd like to address the myths behind chain emails and the alleged consequences of not forwarding them, as well as the real effects that Happy Slapping can have on the victim and the perpetrator. We are seeking to establish relationships with anti-bullying organisations and would like to commit to activity around anti-bullying week in November.

SUMMARY:

Orange did not anticipate how many people would complete this study and we were overwhelmed by the volume of useful insights the findings have afforded us. The recommendations and commitments we have made, we hope, are a step in the right direction to help addressing some of these concerns. We certainly don't have all the answers and see this as a good opportunity to use our good brand name to help highlight the issues and ultimately make a difference.

The Byron review and the launch of the government's guidelines on Social Networking this year only serve to demonstrate the scale of the problem of online safety and as a service provider we have a responsibility to get involved.

I would like to take this opportunity to thank you for taking the time to read this report and please feel free to contact me with your feedback and ideas.

Thank you

Christèle Delbè
Head of Corporate Responsibility
Orange UK

RESEARCH METHODOLOGY

At time of printing, almost 40,000 people had completed the questionnaire on www.myinternetage.com. A sample of nearly 24,000 users was analysed to produce the report.

In addition to the quantitative analysis of data from the web questionnaire, UCLan conducted moderated focus groups with over 100 school children and disadvantaged youth groups to help contextualise the findings and provide additional insight into children and students' experience and perception of the digital divide.

REPORT CONTRIBUTORS:

The Internet Age study is a partnership between Orange and Dr Jo Bryce, Director of Research at the Cyberspace Research Unit, School of Psychology, University of Central Lancashire. Her research interests focus on the psychological, social and forensic aspects of Information Communications Technologies. This includes the potential consequences of media and ICT use for the psychological and social development of young people; the development and implications of media and communications regulatory policy for consumers, the involved industries and relevant enforcement agencies; the role of ICTs in the commission of criminal offences; the organisation and function of online criminal networks; consumer perceptions of crime and risk; and the evaluation of public awareness campaigns. She has worked on a number of research projects including the EU funded mGain Project, and was the Project Manager for the Intellectual Property Theft & Organised Crime (IPTOC) Project. More recently, she was the Coordinator of the UK National Awareness Node for Child Safety on the Internet, and the project lead for the recently completed EU funded research projects ISCA and INSAFE (both funded by the EU Safer Internet Plan).