BBC | Marketing & Audiences

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Media Literacy: Understanding Digital Capabilities

July 2012

Ipsos MediaCT

Objectives

To understand the current ‘State of the Nation’ with regards to internet literacy

To segment the online population based on internet literacy

Project outline

Qualitative exploration of the State of the Nation

- What are they doing online?
- How well?
- How confident are they?
- What would they like to be able to do?

Face-to-face survey of all aged 5+ quantifying the State of the Nation

- 218 kids 5-10 (short survey)
- 198 kids 11-14 (longer survey)
- 2056 adults 15+ (longer survey)

Segmenting the UK population

- Focus on behaviours, needs and drivers
- Recommend how BBC can promote new ways of using online activities, & increase confidence

Focus = internet use
Not extended to wider digital media

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Key learnings from initial qualitative stage

There is a desire to learn and improve digital literacy

Smart mobile devices are making skills easier to learn

BBC involvement appeals across levels of literacy

Increasing confidence and knowledge for those with low literacy is a big challenge.

Google and YouTube: Do you challenge or utilise existing learning

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Understanding the current *State of the Nation*

Internet usage

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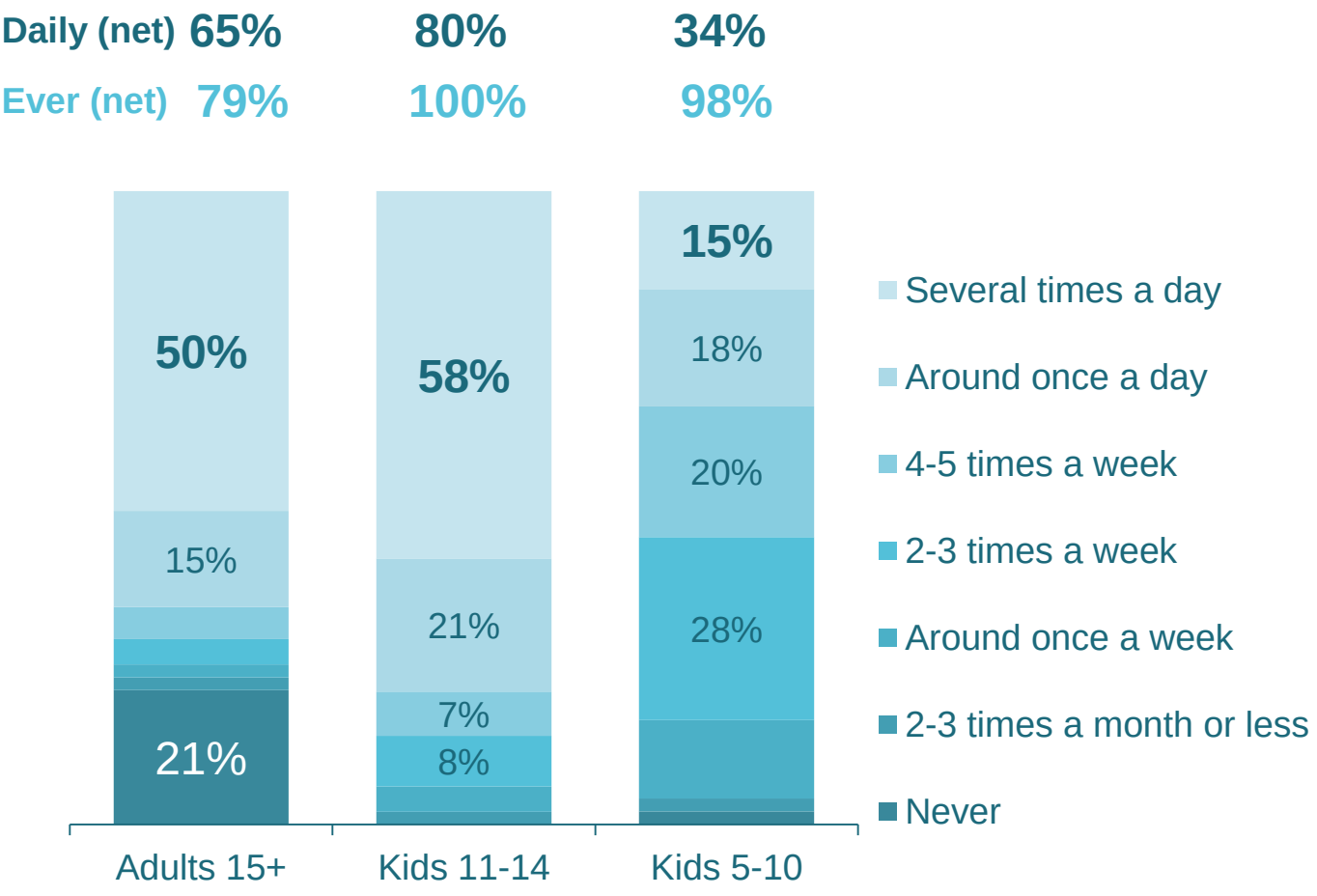
Whilst 1 in 5 UK adults are not online nearly all kids aged 5 upwards are – accessibility is still a problem



Biases still exist

Internet access is more frequent amongst **males**

Internet access decreases with **age** ***(except amongst kids where it increases with age)***

Internet access increases with higher **social grading**

Adults 15+: 2056, Kids 11-14: 198, Kids 5-10: 218 (unweighted)

QNETFRQN, QS7

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The internet is ingrained in the lives of many

46%

CAN'T LIVE WITHOUT THE INTERNET

11-14s, young adults, **higher affluence,** metropolitan residents, students, users via newer technologies

32%

FEEL THEY SPEND TOO MUCH TIME ONLINE

11-14s, young adults, **lowest affluence,** metropolitan residents, students, **unemployed,** users via newer technologies

Adults 11+: internet users 1,733 (Unweighted)

Q19

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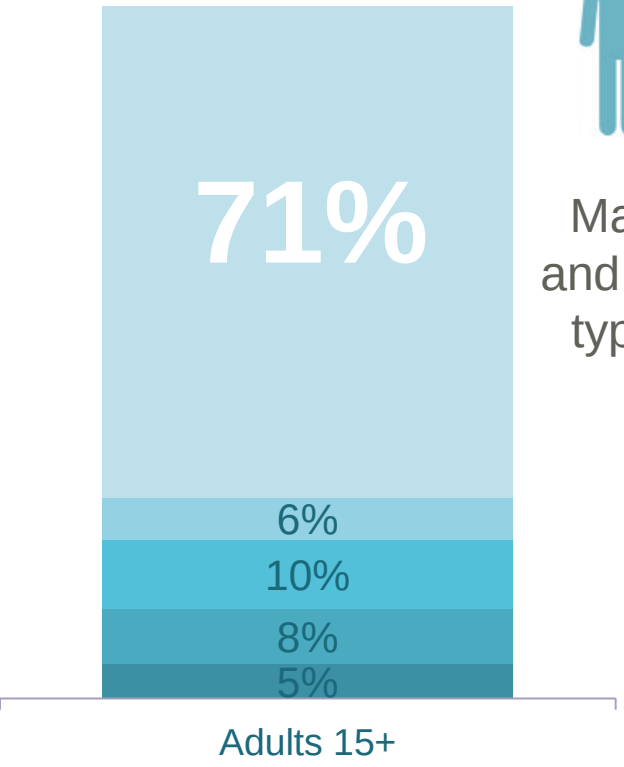
Most adult internet users have been online for over 6 years, with young, upmarket males online for longest



Biases exist

Males, younger age groups and higher social grades have typically been online longer

Internet newcomers

1 in 10 adults came online within the last 2 years

Adults 15+: who ever use the internet: 1536, (Unweighted)

QINTTEN

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Communication, research and information, Google, Facebook and YouTube drove newcomers online

INTERNET NEWCOMERS DRAWN ONLINE BY:

33% Communication with family/ friends

21% Info to help in everyday life

21% Research products/ services

19% Info to help with studies / homework

KIDS 11-14 DRAWN ONLINE BY:

58% Playing games

49% Info to help with studies / homework

Adults 15+: came online in past 2 years 148 (Unweighted)

Q14a

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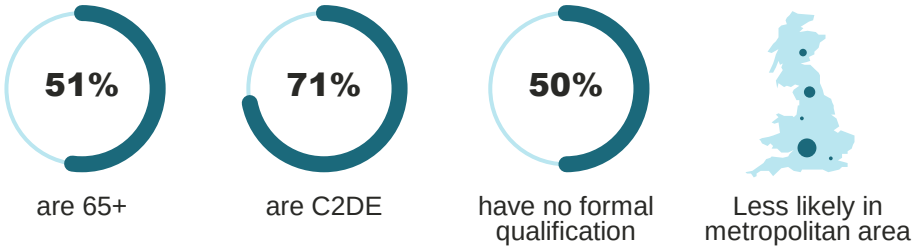
Those who are not online continue to be biased towards older age groups and lower social grades

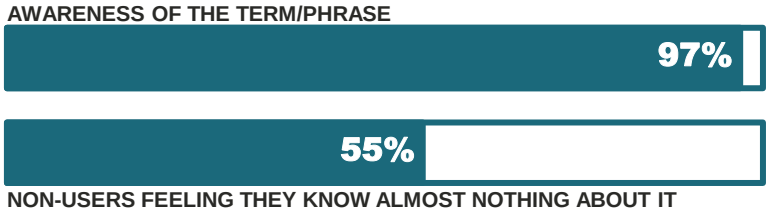
DEMOGRAPHICS

Age and **income related demographics are still apparent** amongst non-users



AWARENESS OF THE WEB

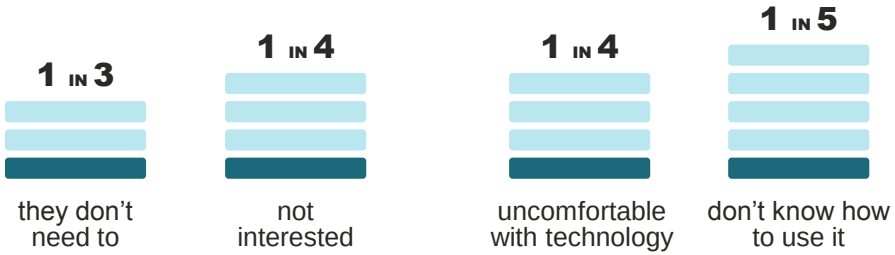
Awareness of the internet is **almost total (97%),** however this is **awareness of the term/phrase** with **55%** of non-users feeling they **know almost nothing** about it, particularly those 65+.



LACK OF INTEREST

Lack of interest is top barrier

Knowledge and concerns are real barriers too



ACCESS AND AFFORDABILITY

Access and **affordability** are barriers; 15% claim no access to a computer, just under 1 in 10 cite inability to afford a computer or internet connection. But **outweighed by interest, knowledge and concern**

Adults 15+: who are not online 520 , not used in the past 391, used in the past 111 (Unweighted)

Q7, Q9a, Q9b

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Half of those not online have a relationship with the internet – either in the past or via someone else

LAPSED USERS

23% of adult non-users have used the internet before (less likely to be 65+).

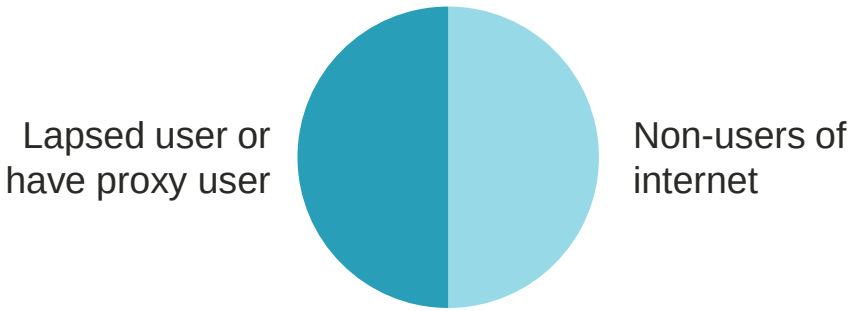
Lack of interest is a key barrier along with access and affordability – perhaps not barriers before?

PROXY USERS

4 in 10 adult non-users get someone to use the internet on their behalf (proxy use spans all age groups).

When things became hard, the first thing I had cut off was the internet and cable TV

Male, Cardiff, Low Literacy



½ of non-users are **lapsed** or have **proxy use**

- have more web knowledge
- show more interest in internet use
- are more likely to go online at home in next year *than non-users overall*

Adults 15+: who are not online 520 (Unweighted)

Q4, Q5

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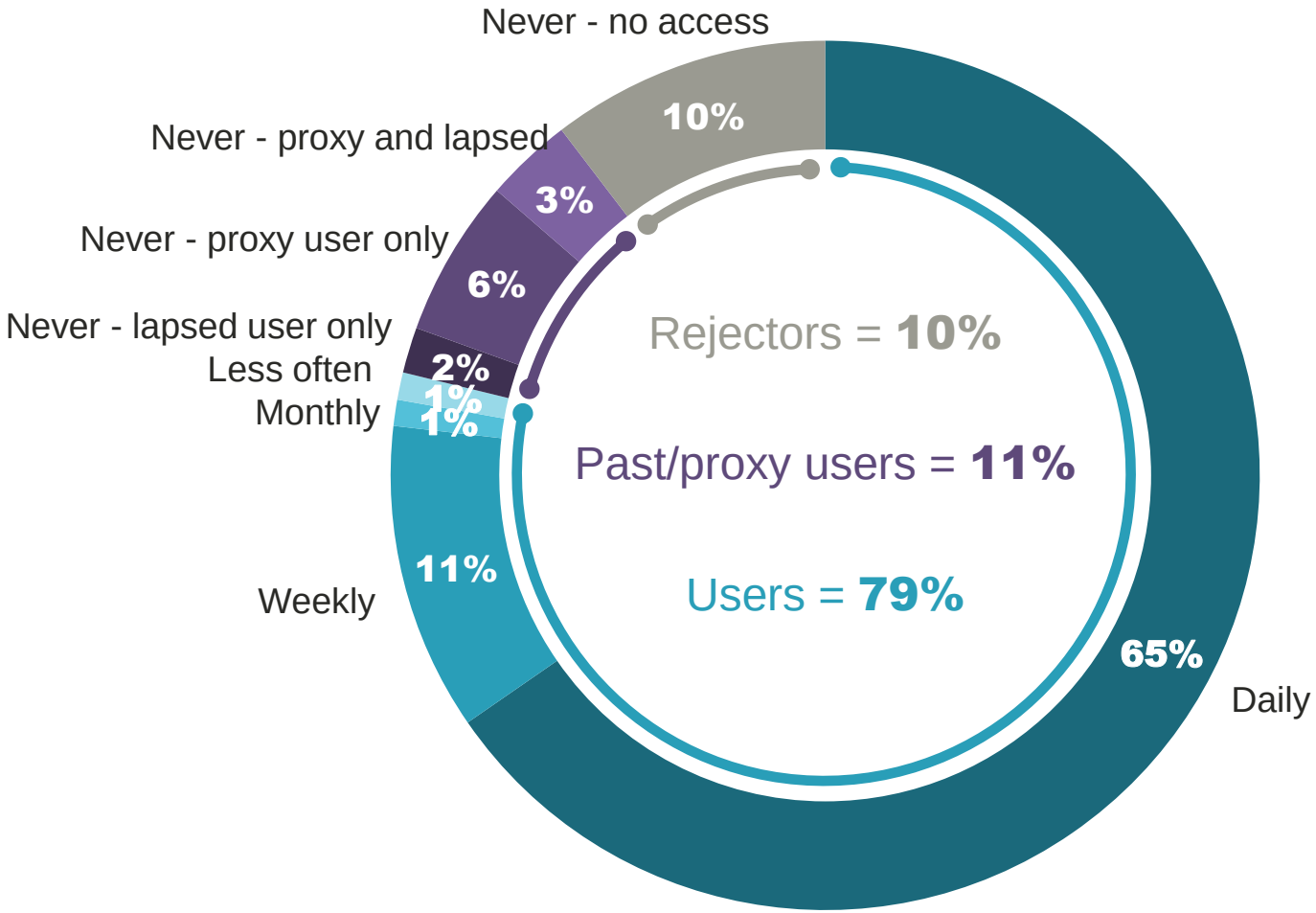
The overall population and their relationship with the internet



Adults 15+: 2056 (unweighted)

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Barriers need breaking down to increase internet usage via new technologies, for example security fears

I would be frightened of buying things online...giving out my numbers and giving my bank details away

Female, Stockport, Low Literacy

You need to know which apps are trustworthy, you know Limewire [virus] - I had to buy a whole new laptop because of it

Female, London, High Literacy Young Person

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Beyond security, other barriers hinder online access via mobile devices

The other thing with the phone is that I'm terrified of what it might cost me

Male, Cardiff, Low Literacy

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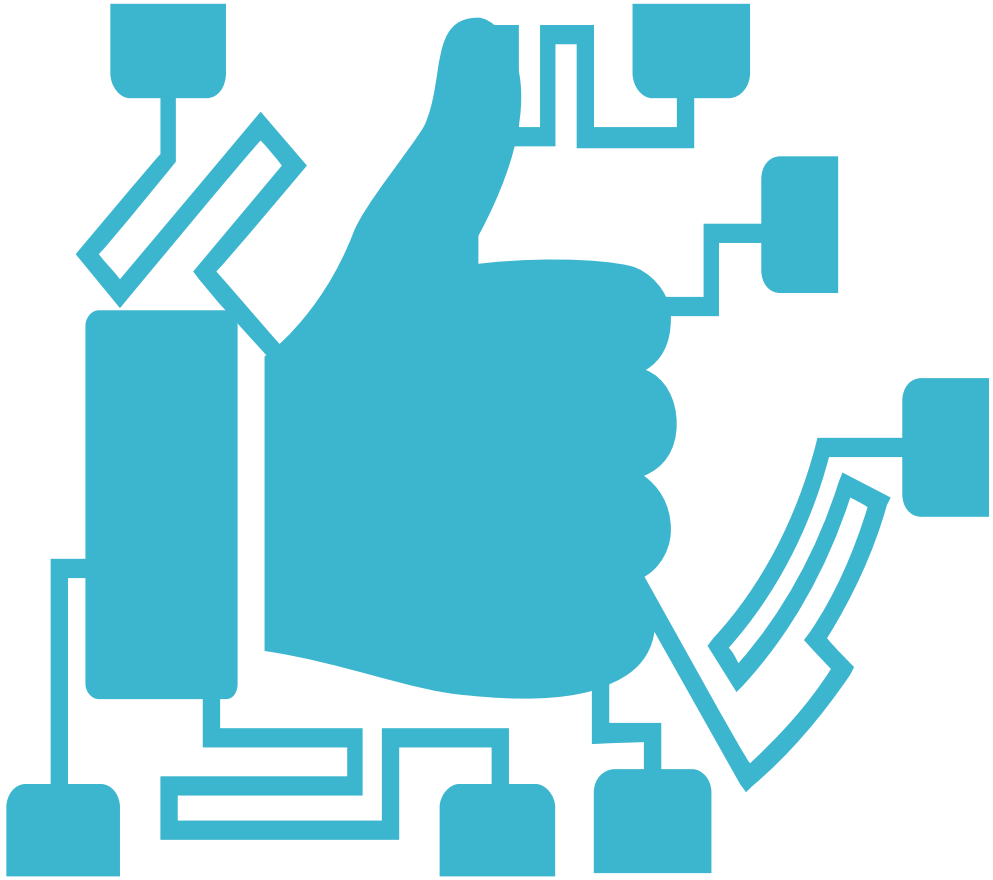
Understanding the current
State of the Nation

Confidence and competence



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Competence - The vast majority of internet users claimed high levels of competence in use of the internet

Self rating on internet use – competence
(kids 5-10 different text)

Internet users: Adults 15+: 1536, Kids 11-14 197 , Kid 5-10 214 (Unweighted)

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Confidence - Whilst the vast majority are very confident with use of the internet, it sits lower than competence

Self rating on internet use – confidence
(kids 5-10 different text)

Internet users: Adults 15+: 1536, Kids 11-14 197 , Kid 5-10 214 (Unweighted)

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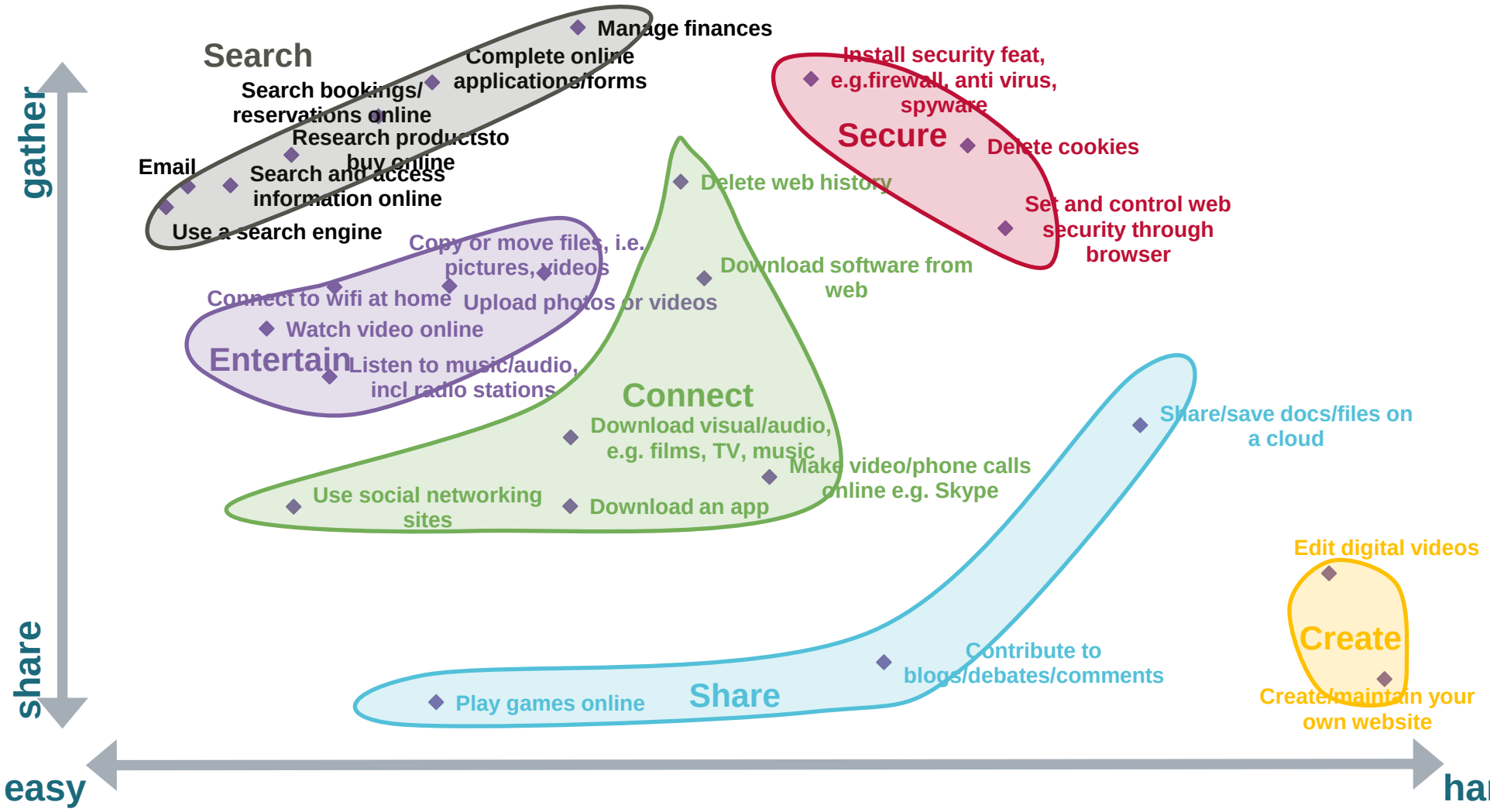
Tasks can be mapped and grouped by ease of completion and extent to which it shares or gathers information



Internet users 11+ 1,733 (Unweighted)

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There is a positive correlation between tasks attempted and those adults can competently do

Internet users: Adults 15+: 1536 (Unweighted)

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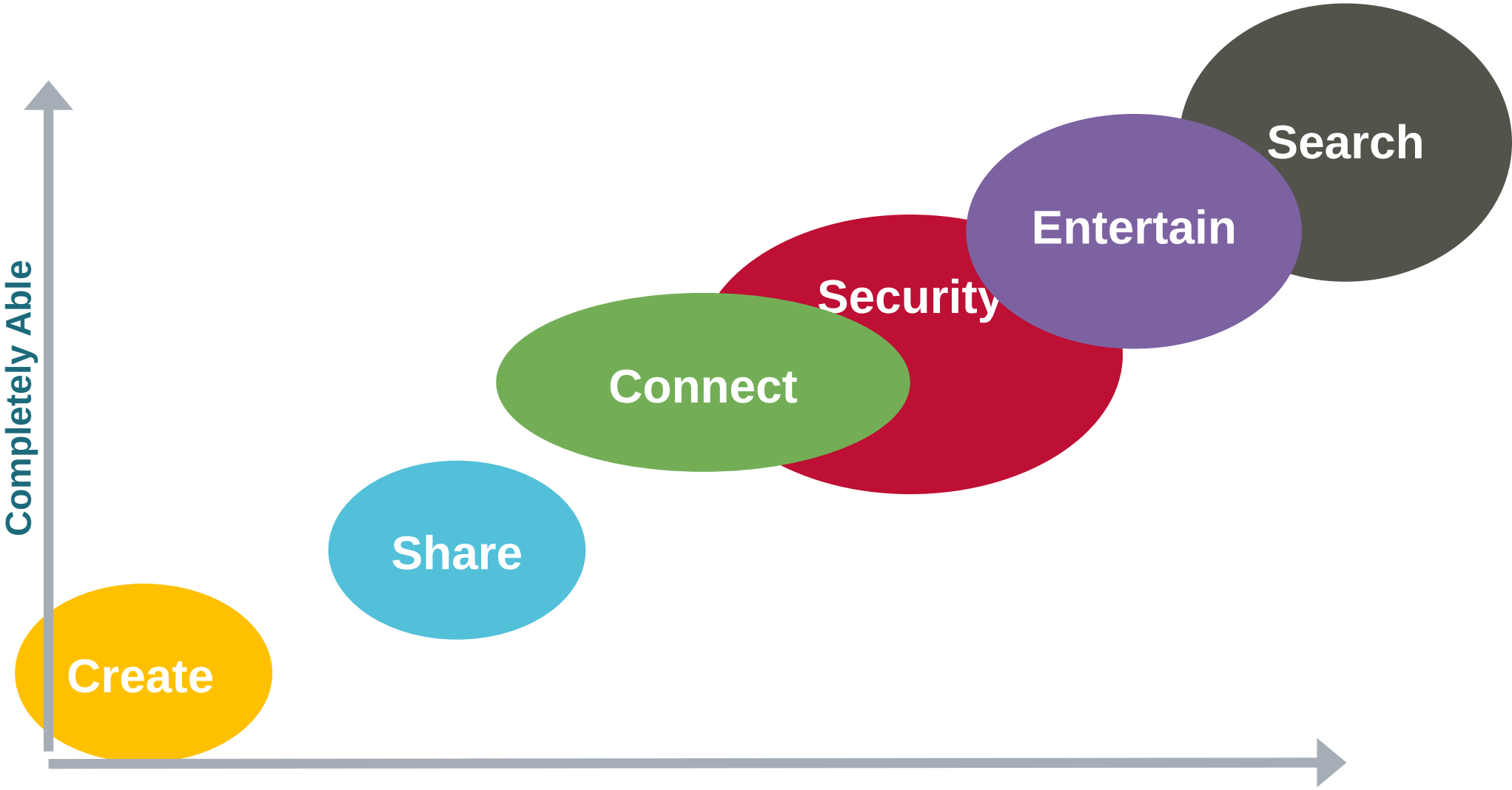
Search and entertain are the most popular and able tasks



Internet users: Adults 15+: 1536 (Unweighted)

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Is a lack of confidence preventing internet users from attempting those tasks that they feel they wouldn't be able to do successfully?

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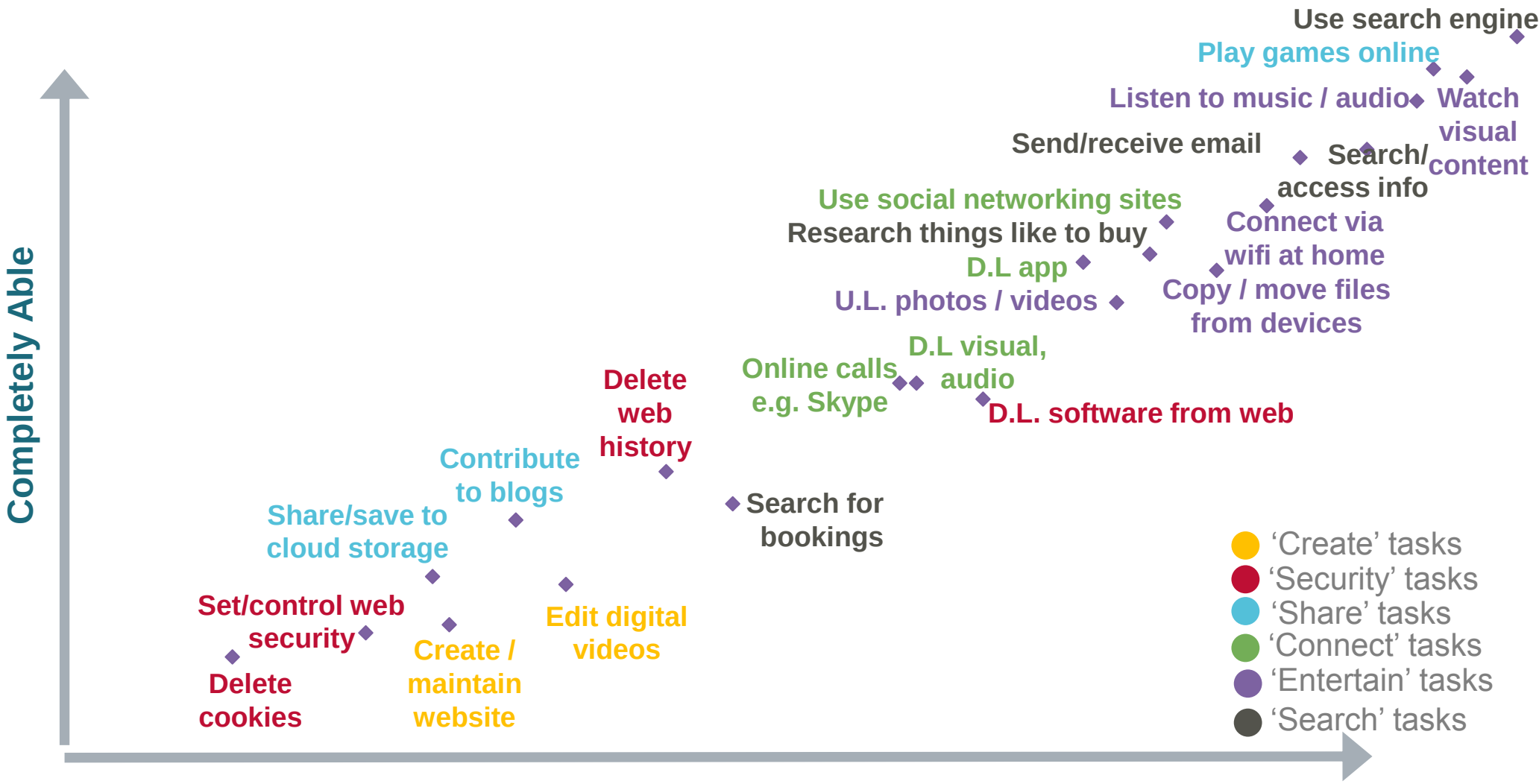
Amongst 11-14s a similar positive relationship exists



Internet users: Kids 11-14 197 (Unweighted)

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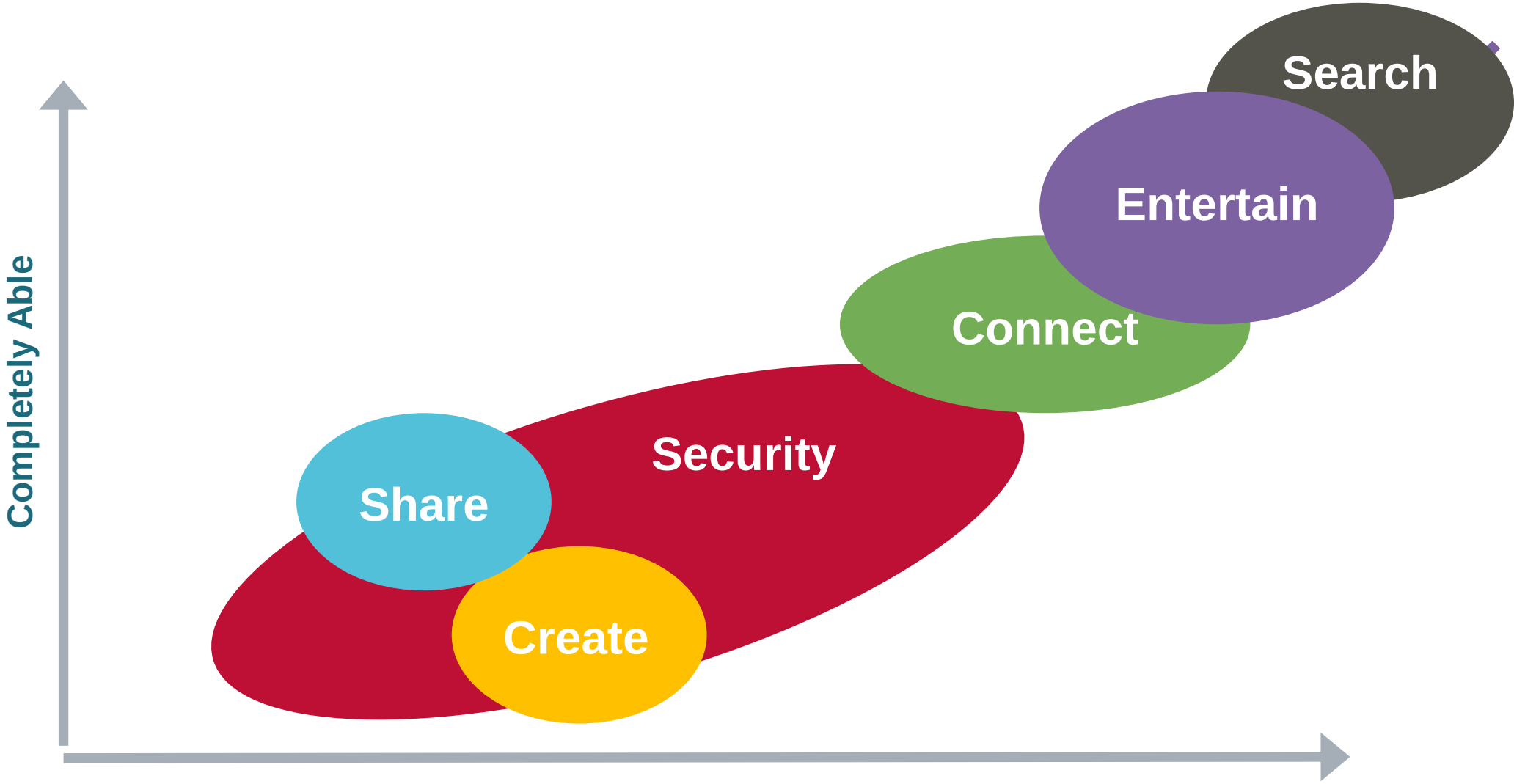
Perhaps worryingly, security tasks perform relatively poorly amongst 11-14s for popularity and competence



Internet users: Kids 11-14 197 (Unweighted)

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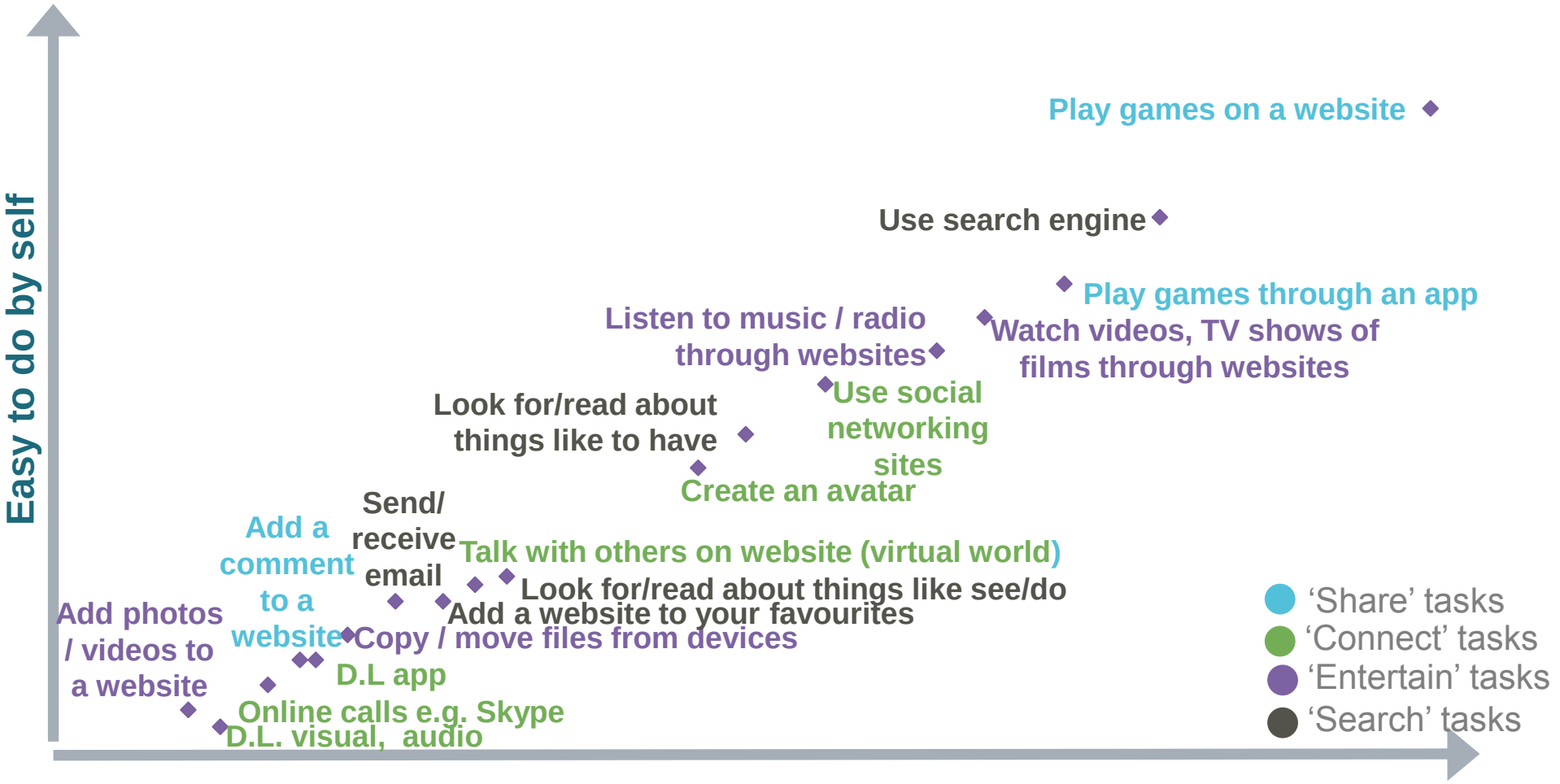
For younger kids, whilst many can do tasks alone, they don't always find it easy to do them



Internet users: Kids 5-10 214(Unweighted)

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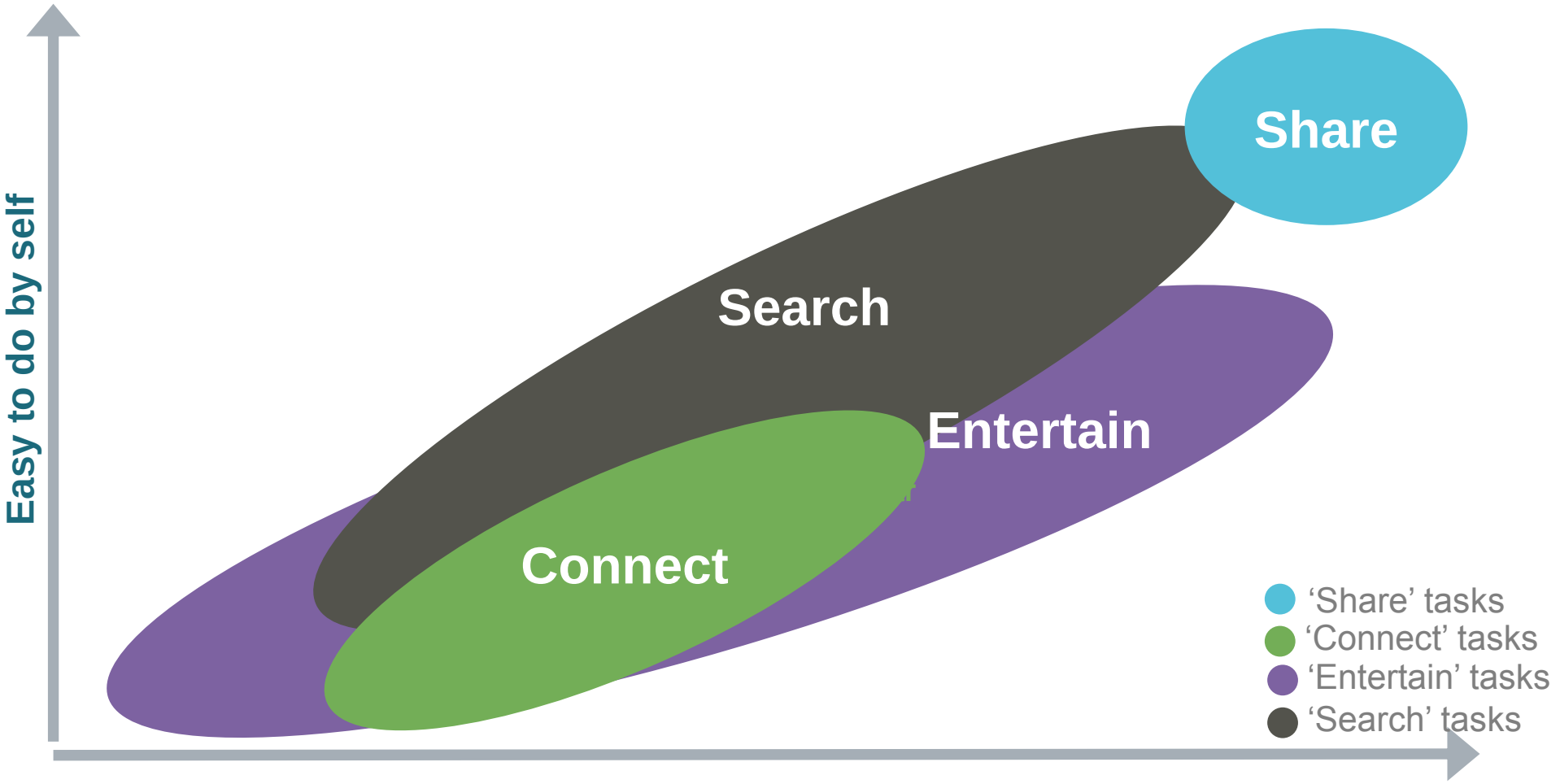
And there is a wider spread of the tasks



Internet users: Kids 5-10 214(Unweighted)

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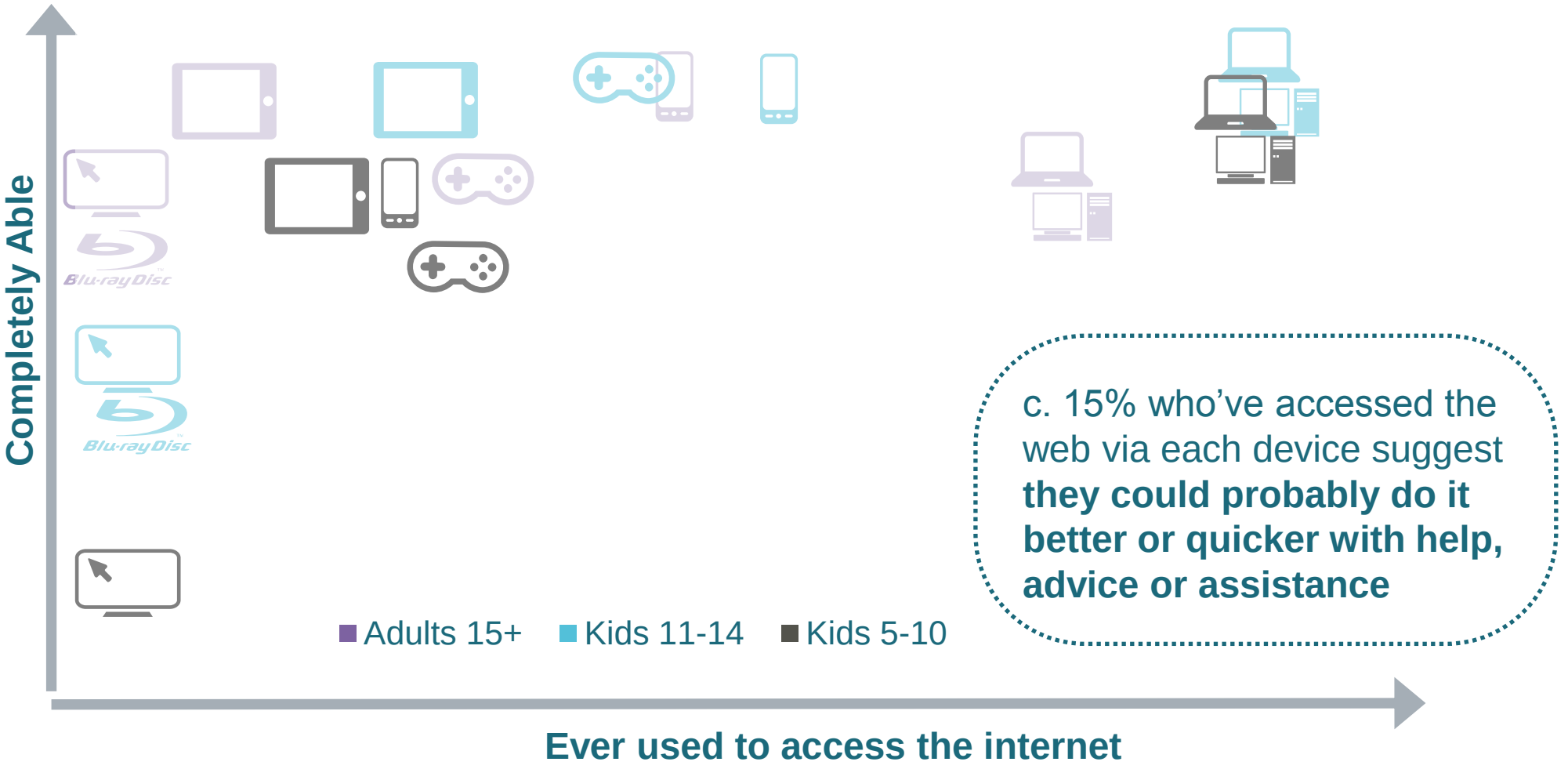
Nearly all who access the internet by a given device claim they are completely able to do so



c. 15% who've accessed the web via each device suggest **they could probably do it better or quicker with help, advice or assistance**

Adults 15+: 2056, (Unweighted)

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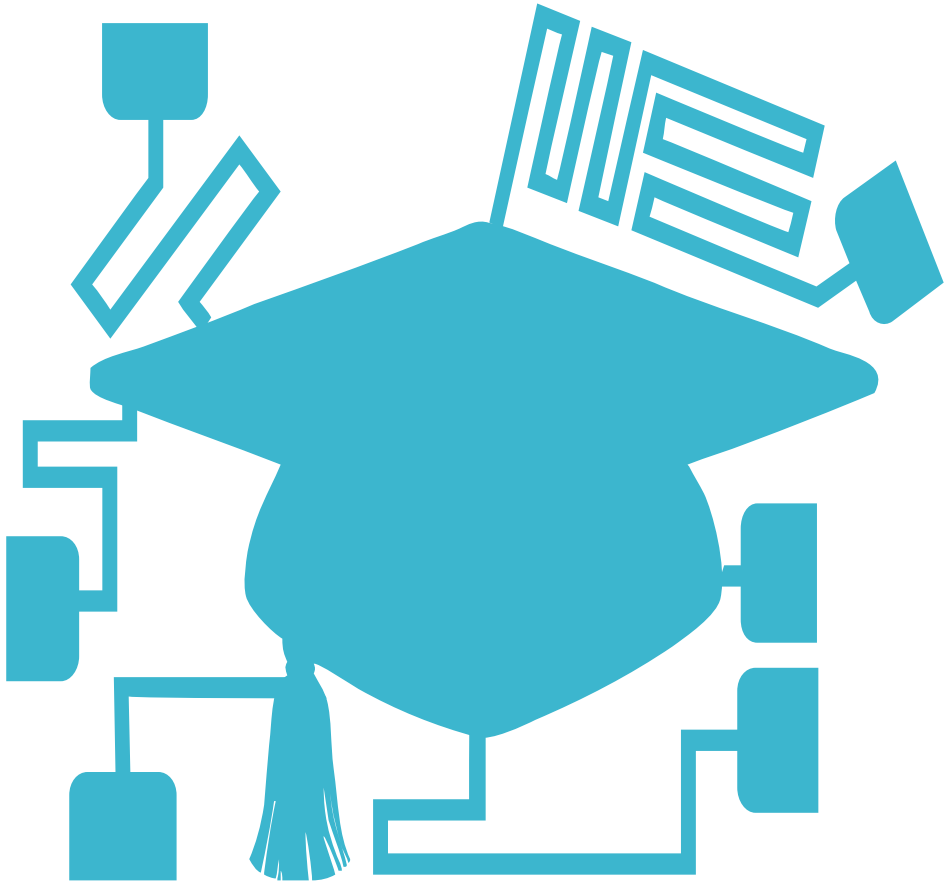
Understanding the current *State of the Nation*

Overall online learning



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Most internet users claim they can do all they want or need to do online, suggesting little need to learn more

86%

can do all they want/need to do online

I feel like I am happy with the knowledge I have, I am happy to continue the way I am, I don't feel that I need new knowledge, but I am always open to learning.

Male, London, Mid Literacy

The technical side of it, to be honest, I am okay with not understanding the really techy bit, I don't know what html is but I am ok with that!

Male, London, Mid Literacy

Adults 15+: internet users 1,536 (Unweighted)

Q19

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Worry is a key barrier to trying anything new online, even amongst those who are web competent

Agree (strongly / slightly) %

"I don't like to try new things on internet because I'm worried I will do something wrong"

18%

Not limited to less technologically able, c.15% agreement amongst those:

- who go online daily
- believe they are internet competent
- have been online for over 6 years
- aged 11-14 who have grown up in the digital age

Adults 15+: internet users 1,536 (Unweighted)

Q19

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Worry is a particular barrier for females, older age groups and those limited to PC/laptop access

It is very frustrating when you have no idea and you are frightened of ruining everything on your computer and losing everything."

Female, Stockport, Low Literacy

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At the same time, many believe they need up-skilling

I want to know more stuff...I want to know what everyone else already knows, the cloud is a really good example I think because the cloud is something I am supposed to know about

Male, London, Mid Literacy

I would like to be able to manage my computer with my photographs and attachments so I can send things safely not 3 or 4 times

Female, Stockport, Low Literacy

They (people with high digital literacy) would be able to design their own website, build their own protection, maybe even access other people's information without them knowing, computer hackers

Male, Cardiff, Low Literacy

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Up-skilling may be required because they rely on others, are currently limited or being left behind

Agree (strongly / slightly) %

52% don't want to get left behind

16% want to learn more about web but don't know where to start

33% need to rely on help from others...to learn new web skills

17% feel they're being left behind with lack of knowledge / use of internet

21% feel restricted in what can/can't do on web due to lack of skills

Adults 15+: internet users 1,536 (Unweighted)

Q19

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For 7 in 10 internet users there is opportunity to learn – but drivers to learn differ

Negative about learning:

90%

I feel like I am happy with the knowledge I have, I am happy to continue the way I am, I don't feel that I need new knowledge, but I am always open to learning

Male, London, Mid Literacy

Opportunity to learn:

71%

Up-skilling:

Female
Older ages
Lower social grades
Lower education
Online in last few years

Not getting left behind:

Males
Higher social grades
11-14s

Adults 15+: internet users 1,536 (Unweighted)

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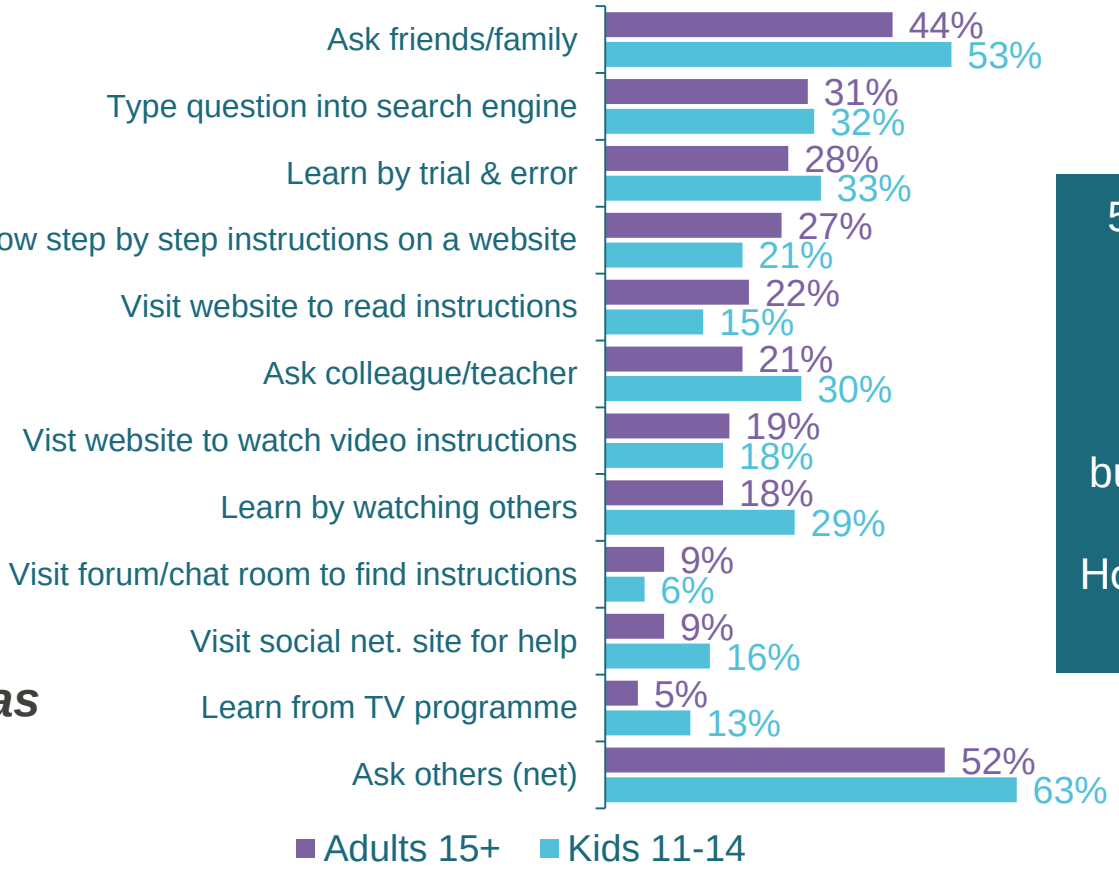
Informal sources, particular friends & family would be a source of knowledge to learn a new online skill

88%

would use an informal approach such as these



5-10s are highly reliant on grown ups

33% will ask a teacher
79% another grown up
but also friends and siblings.

However 1 in 10 aren't afraid to just try!

Adults 15+: internet users 1,536: Kids 11-14: 197 (Unweighted)

Q20

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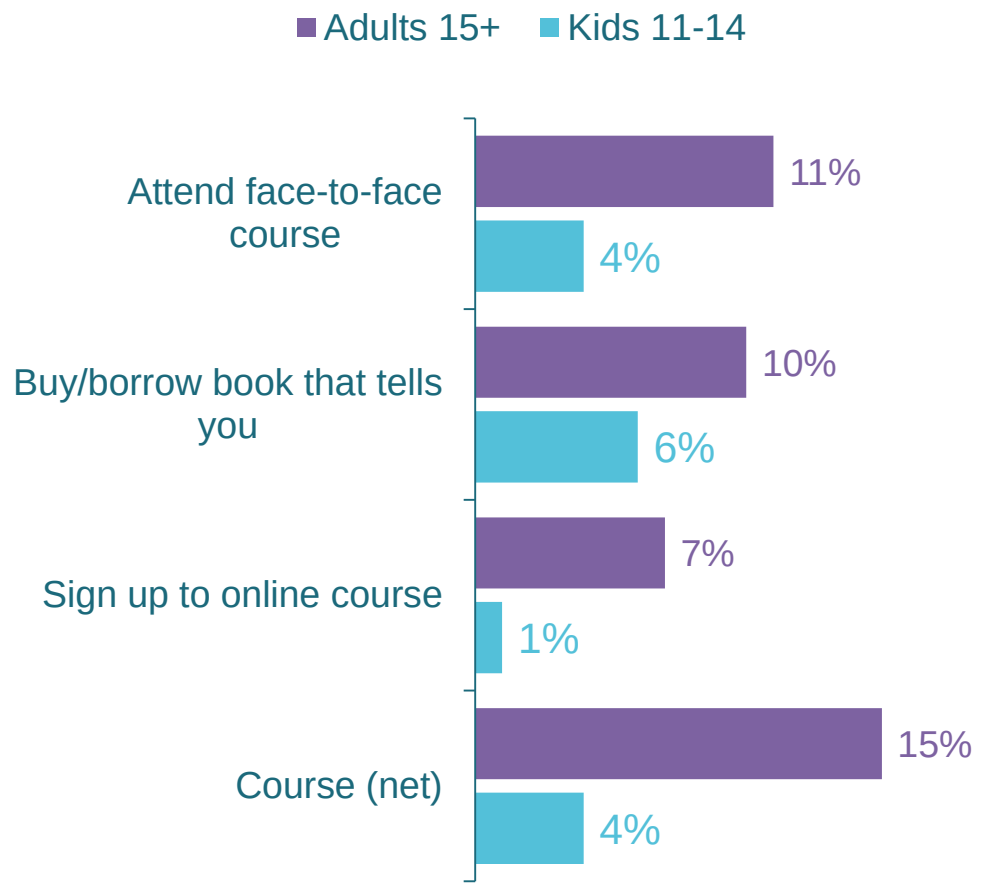
Only 1 in 5 would use a more formal approach to learning new online skills



21%

would use a formal approach such as these

Adults 15+: internet users 1,536: Kids 11-14: 197 (Unweighted)

Q20

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For those with a low level digital literacy learning online skills comes from asking or watching others

Learning Need: Skills + confidence & knowledge building – want to do with confidence, without supervision

Asking friends/family dominates
Watching others
Face to face course

Few will type question into search, trial and error approach, follow online instructions

*..he will put me on the right track **to do searches** and then I just have to run them off but **I want to know how to do that by myself** rather than rely on somebody else... I am just a bit frightened of going ahead and doing things myself*

Female, Stockport, Low Literacy

*I got a Kindle for Christmas and I can now download books, it's a bit fiddly but **I watched my husband do it** for me first, and now it is much easier to do.*

Female, Stockport, Low Literacy

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For the more literate online users, new tasks are learnt through a range of methods

Learning Need: 'How to' learning - online tasks is one of choice - they will learn tasks and when need/desire arises

Search answers to a question
Trial and error
Follow instructions

Whilst they will still ask others this is more popular amongst the less competent

*I thought **YouTube is a good way of learning** as well, I just look up anything, I think the **visual is so much easier**... I think it is easier to pick things up than read a million things*

Female, London, Mid Literacy

***Google has taught me everything**, when I first sat on Facebook I didn't know how to use it so I just Googled it, if there's anything I need to know I would just Google it*

Female, Stockport, High Literacy

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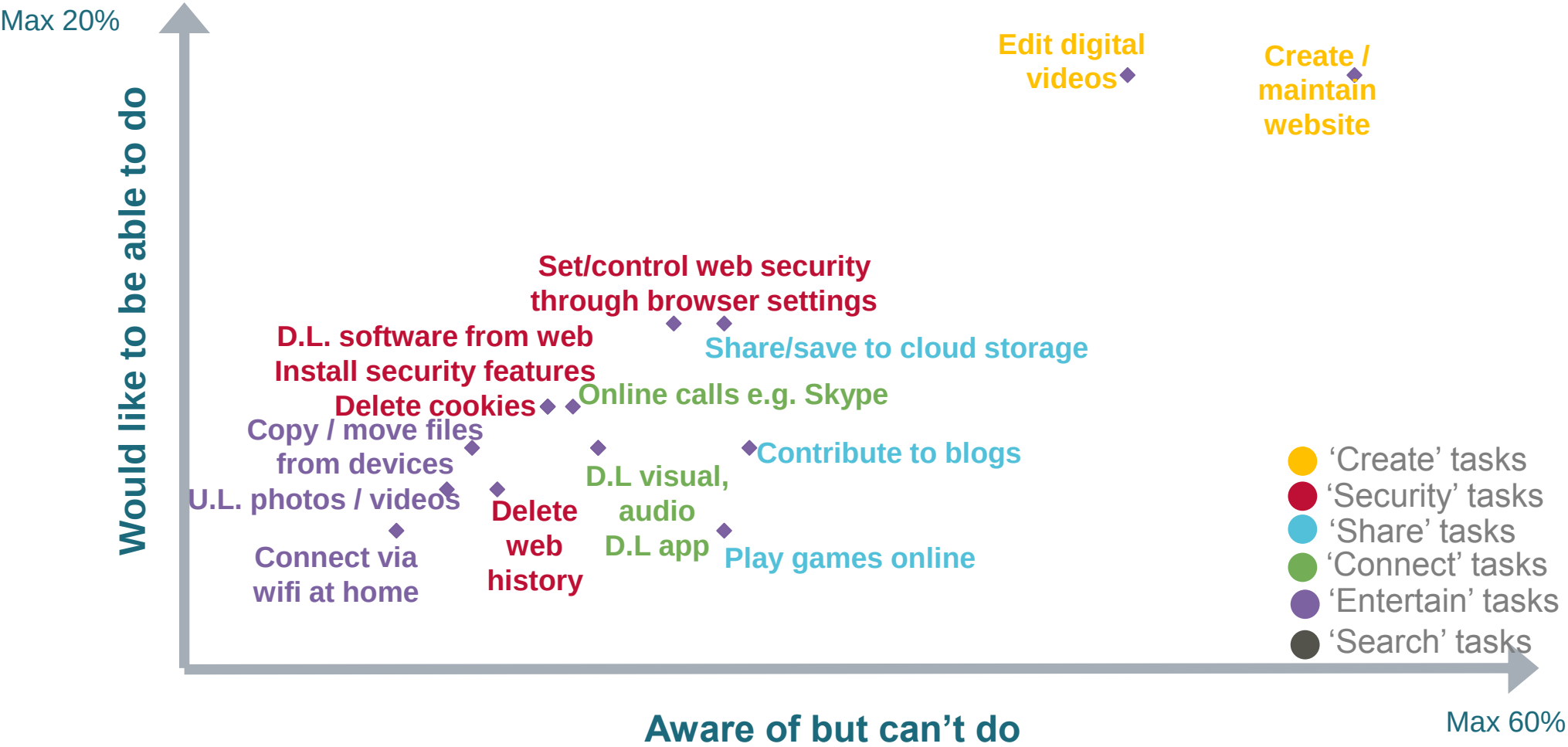
There is a desire amongst some online adults to learn more creative elements and security tasks



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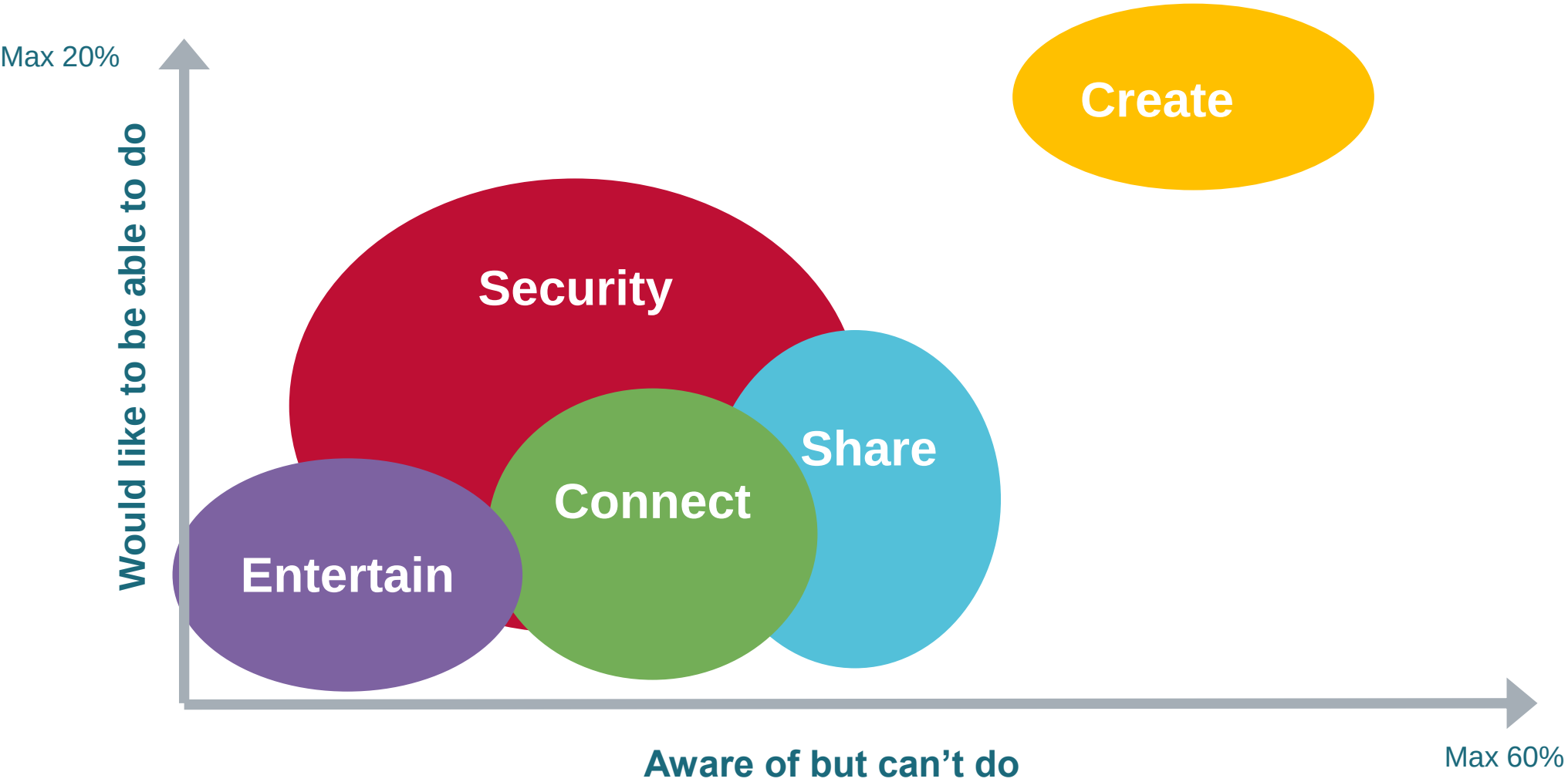
Popular ‘search’ & ‘comms’ tasks don’t feature because most have tried and are competent at these



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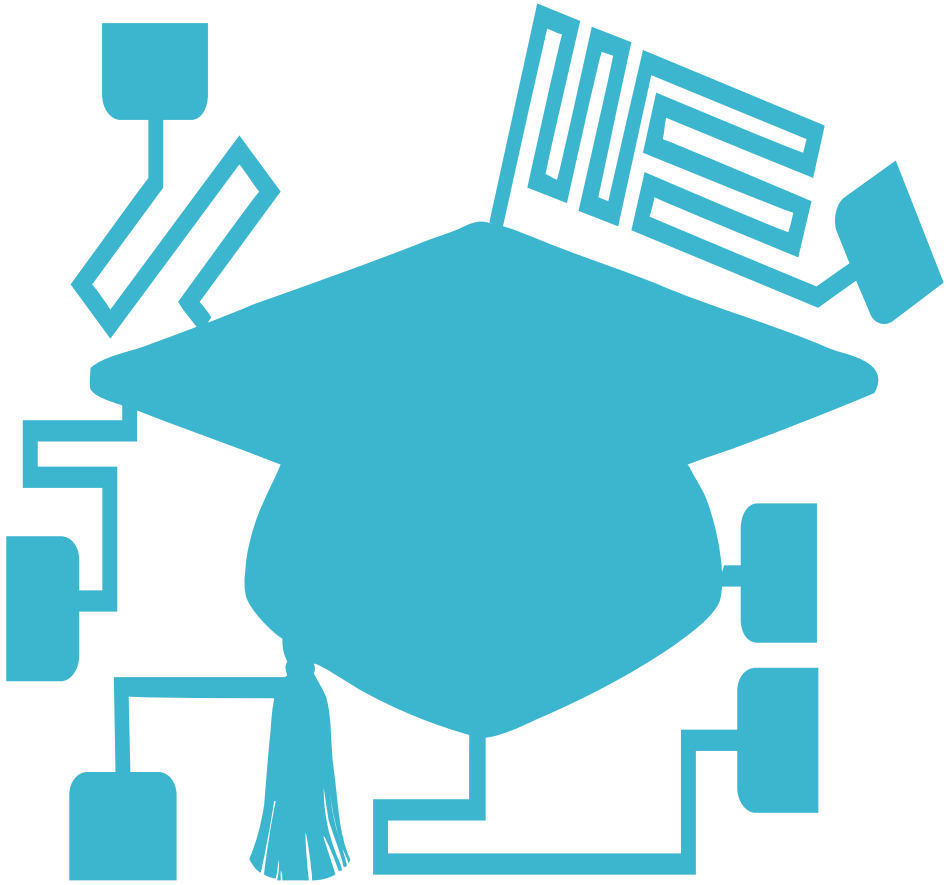
Understanding the current
State of the Nation

Online learning and the BBC



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Segmenting the online population

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Drivers of the segmentation

- General attitudes (3 factors)

Technology

Curiosity

Sociability

- Technology devices

Number of devices to access the internet in household

Number of devices used to access the internet

- Attitudes towards internet (3 factors)

Appreciation of own digital knowledge

Dependence on the internet

Concerns

- Online tasks

Number of task done across devices

Number of tasks competent at

Number of tasks doing less or more often than a year ago

Segmentation based on respondents who have accessed the internet in the past and gave sufficient responses to attitudinal questions (3.8% filtered out). Variables have been standardised to account for different number of tasks of the 11-14 year olds (23 tasks) to the 15 years + (26 tasks). Different numbers of segments have been extracted, a 7 segment solution was settled upon.

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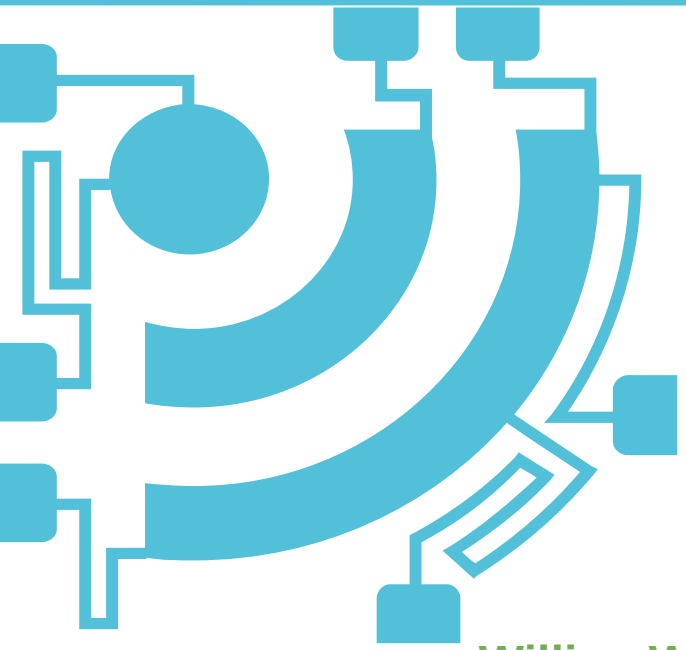
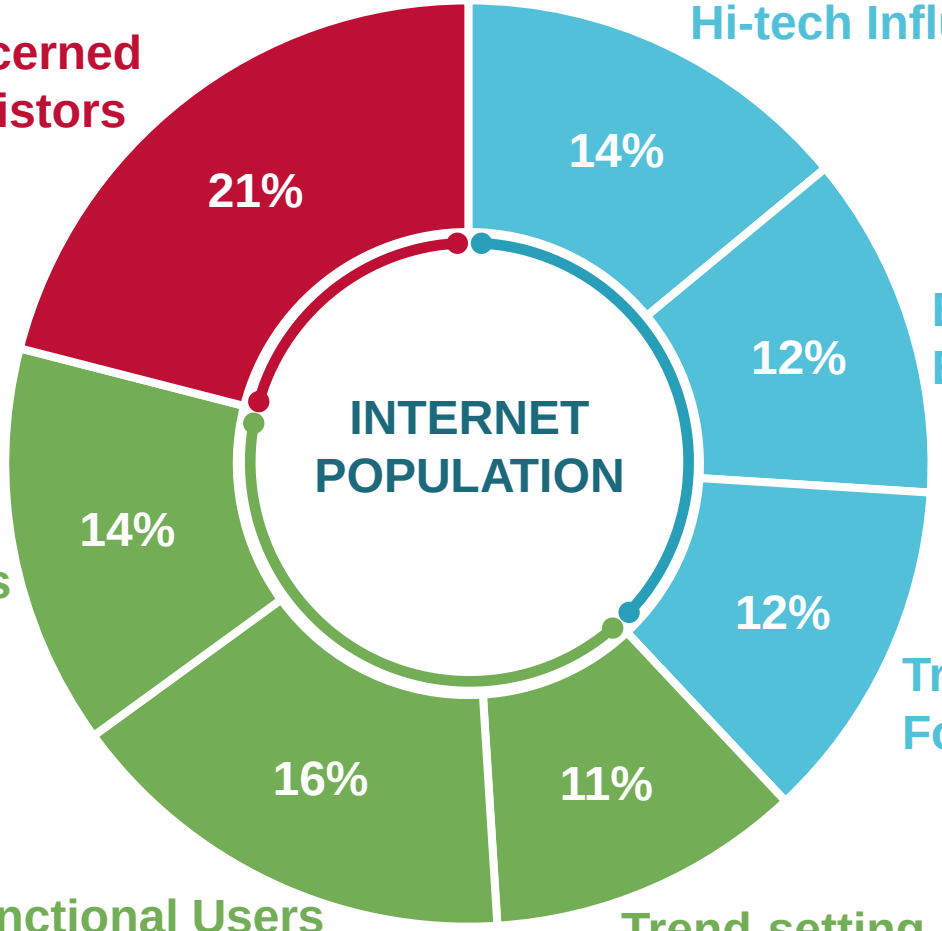
The internet population divides into 7 segments





11+: Total 1659, Hi-tech Influencers: 228, Eager Enthusiasts: 182, Traditional Followers: 210, Trend-setting wannabes: 192, functional users: 240, Willing Worriers: 225, Concerned Resistors: 382 (Unweighted)

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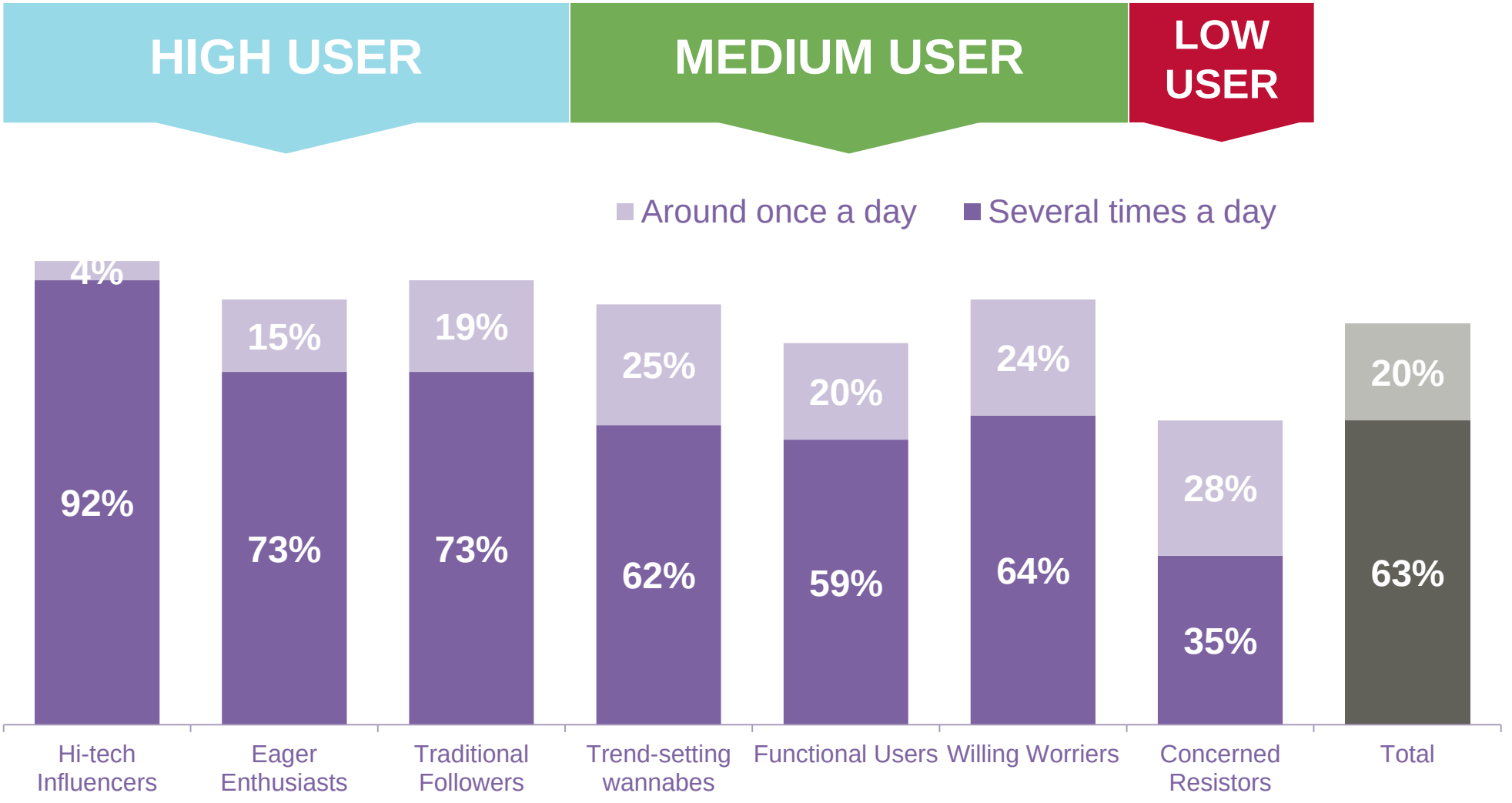
Frequency of accessing the internet



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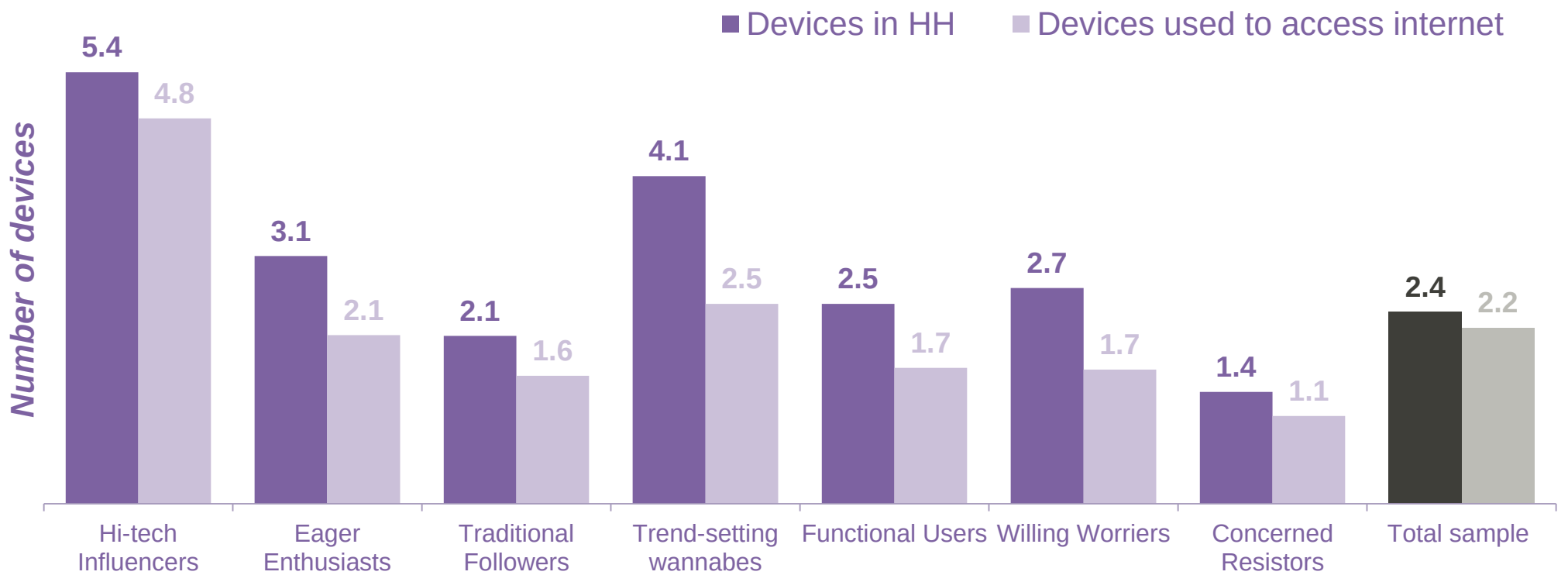
2 segments with above average household ownership of devices that can access the web

HIGH USER | MEDIUM USER | LOW USER



11+: Total 1659, Hi-tech Influencers: 228, Eager Enthusiasts: 182, Traditional Followers: 210, Trend-setting wannabes: 192, functional users: 240, Willing Worriers: 225, Concerned Resistors: 382 (Unweighted)

Q2a/Q2b
Ipsos MORI, April-May 2012

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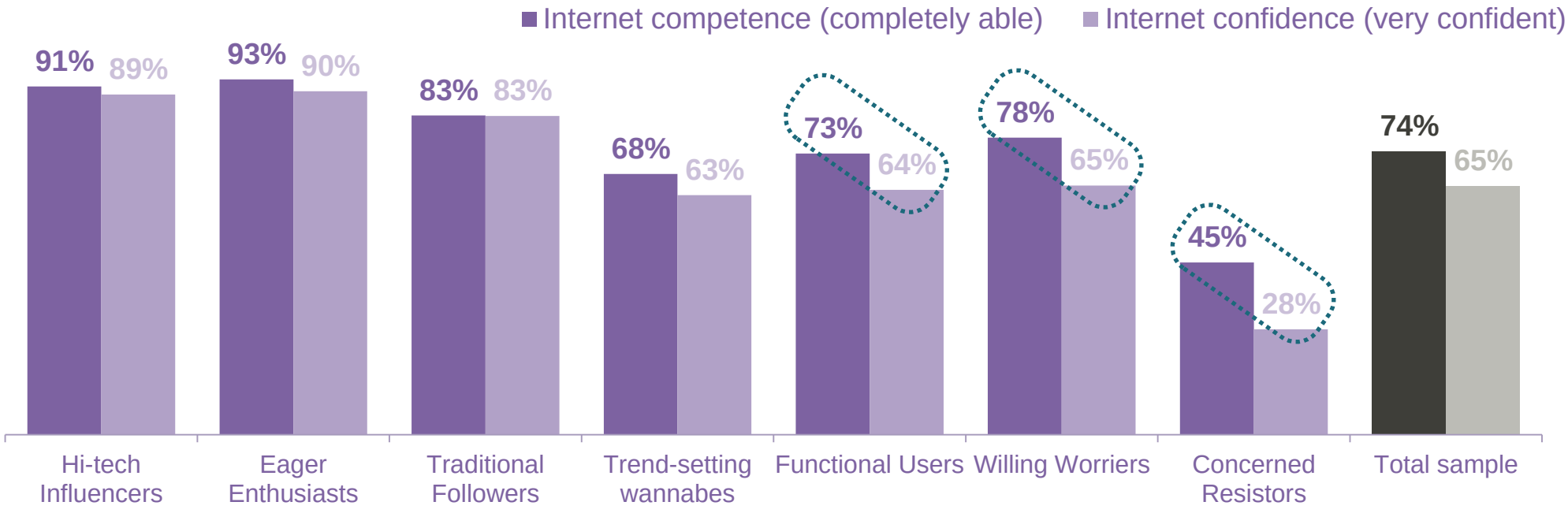
Competence with internet use is very high, but gaps exist between confidence and competence

HIGH USER | MEDIUM USER | LOW USER

I can do all I need/want to do on the internet (Agree)

Hi-tech Influencers	Eager Enthusiasts	Traditional Followers	Trend-setting wannabes	Functional Users	Willing Worriers	Concerned Resistors	Total sample
95%	93%	84%	88%	86%	91%	76%	86%



11+: Total 1659, Hi-tech Influencers: 228, Eager Enthusiasts: 182, Traditional Followers: 210, Trend-setting wannabes: 192, functional users: 240, Willing Worriers: 225, Concerned Resistors: 382 (Unweighted)

Q3a/Q3b

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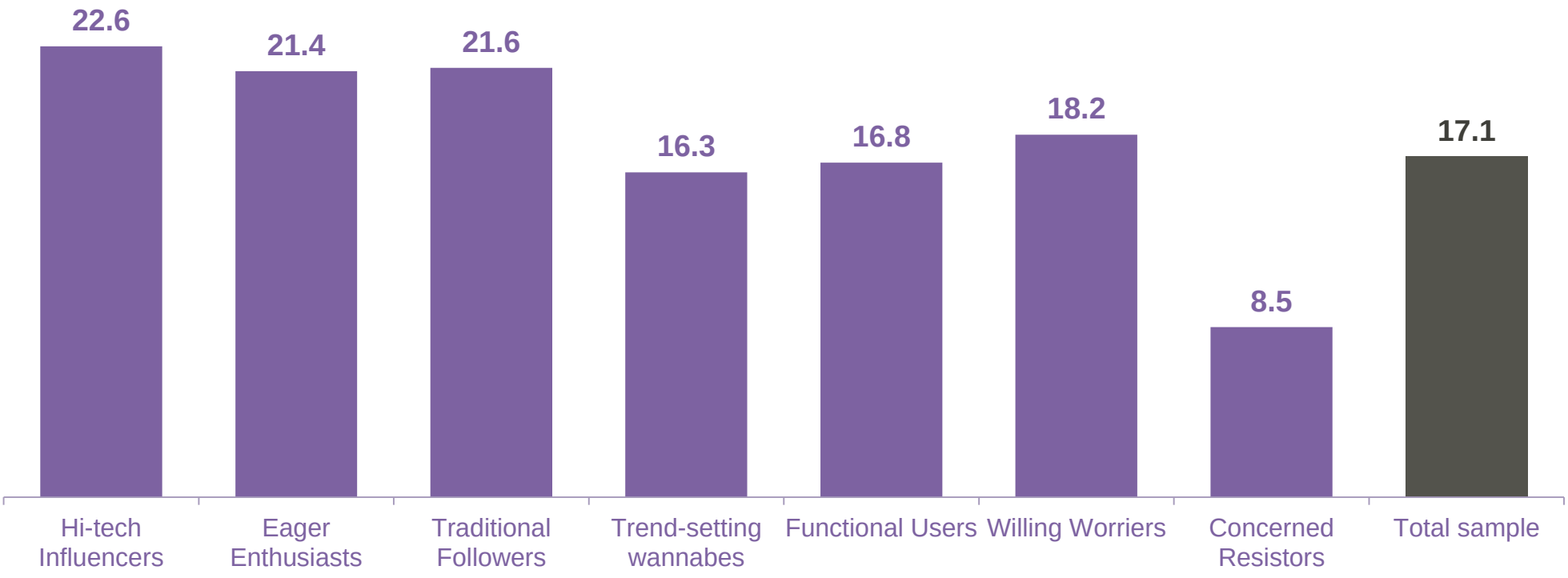
3 segments of the online population had ever tried over 20 of the 26 varied tasks surveyed

HIGH USER | MEDIUM USER | LOW USER

Number of tasks ever done



11+: Total 1659, Hi-tech Influencers: 228, Eager Enthusiasts: 182, Traditional Followers: 210, Trend-setting wannabes: 192, functional users: 240, Willing Worriers: 225, Concerned Resistors: 382 (Unweighted)

Q15

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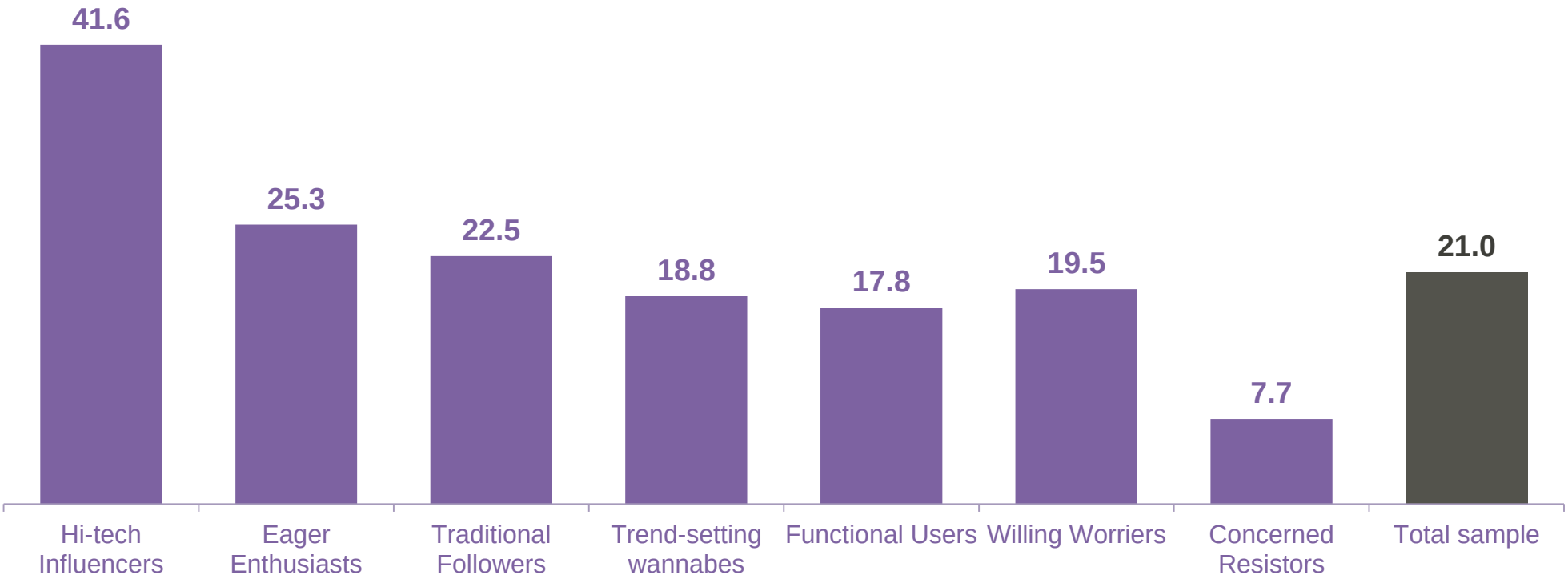
But only 1 segment stands out when looking at the number of tasks tried across multiple devices

HIGH USER | MEDIUM USER | LOW USER

Number of tasks ever done across devices



11+: Total 1659, Hi-tech Influencers: 228, Eager Enthusiasts: 182, Traditional Followers: 210, Trend-setting wannabes: 192, functional users: 240, Willing Worriers: 225, Concerned Resistors: 382 (Unweighted)

Q177

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Scorecard to show the differences between segments

- 11+: Total 1659, Hi-tech Influencers: 228, Eager Enthusiasts: 182, Traditional Followers: 210, Trend-setting wannabes: 192, functional users: 240, Willing Worriers: 225, Concerned Resistors: 382 (Unweighted)

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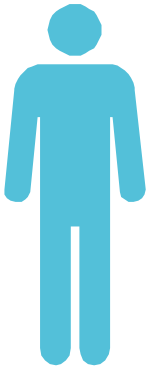
Hi-tech influencers (14%)

VERY HIGH USER



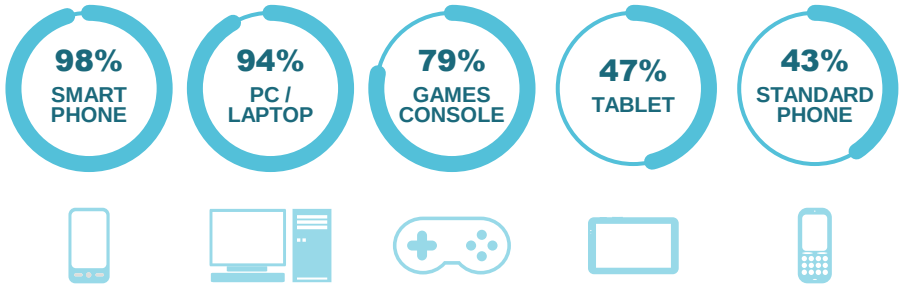
Age 11-14
13%

Spread of ages between
18-54

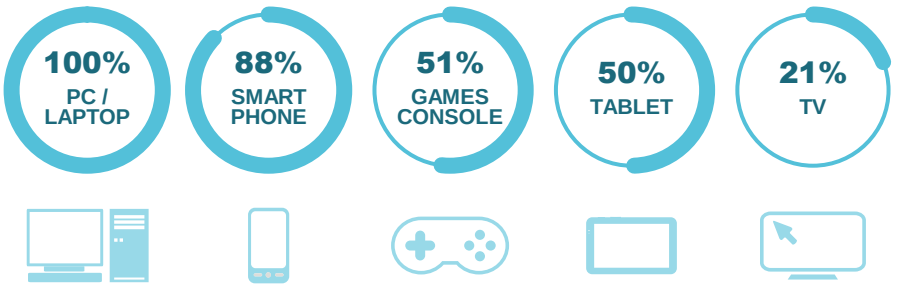
AB

- Tech savvy
- Recommend tech to friends and family
- Friends and family ask my opinion about latest trends
- Very sociable
- Like to keep up to date with what is going on around the world
- Like to find things out for self
- Cant live without the internet

5.4 INTERNET DEVICES IN HOUSEHOLD (TOP FIVE)



4.8 DEVICES USED TO ACCESS INTERNET (TOP FIVE)



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Hi-tech influencers (14%)

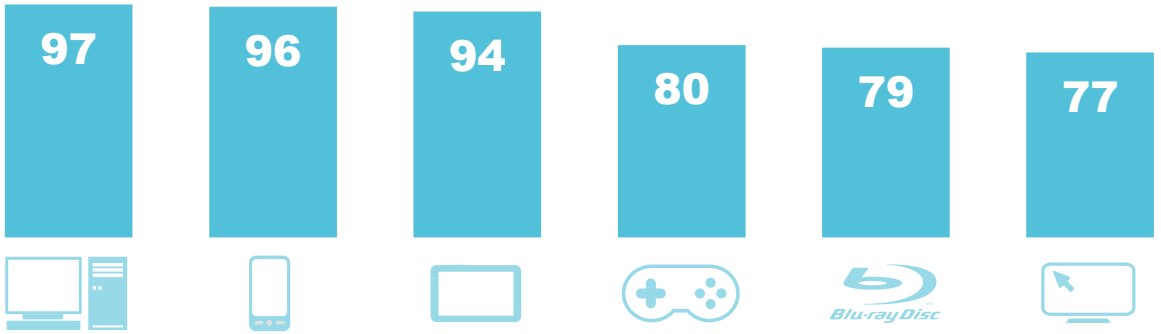
AV 22 TASKS COMPLETELY ABLE TO DO

(They are more likely to be completely able to do all tasks)

0.4 WOULD LIKE TO BE ABLE TO DO

- 15% — CREATE MAINTAIN WEBSITE
- 5% — EDIT VIDEO
- 4% — SET AND CONTROL INTERNET SECURITY THROUGH BROWSER SETTINGS
- 4% — CLOUD STORAGE

COMPETENCE OF DEVICE AMONG THOSE WHO USE THAT DEVICE TO ACCESS THE INTERNET *(COMPLETELY ABLE)*

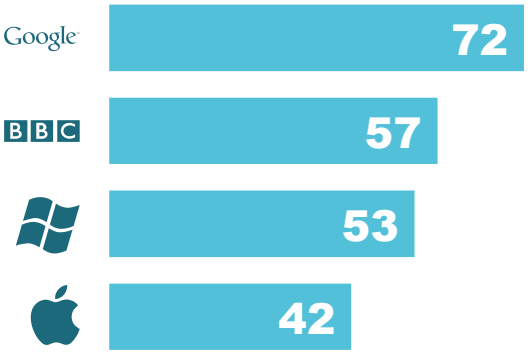


HOW THEY LEARN

- 56% Ask other people
- 48% Learn by trial and error
- 45% Search Google
- 42% Follow step-by-step instructions

Most likely to sign up to an online course and visit a forum/chat room but also most likely to learn by trial and error/teach self

TRUST BRANDS FOR LEARNING



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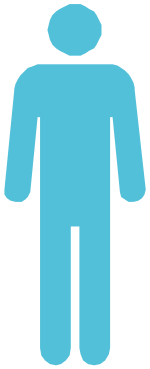
Eager Enthusiasts (12%)

HIGH USER



Age
18-44

Age 18-24
29%

ABC1

- Enjoy figuring out how technology works
- Friends and family ask my opinion about latest trends
- Sociable
- Like to find things out for self
- Concerned about online privacy

3.1 INTERNET DEVICES IN HOUSEHOLD (TOP THREE)

2.1 DEVICES USED TO ACCESS INTERNET (TOP TWO)

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Eager Enthusiasts (12%)

AV 21 TASKS COMPLETELY ABLE TO DO

(They are more likely to be completely able to do all tasks)

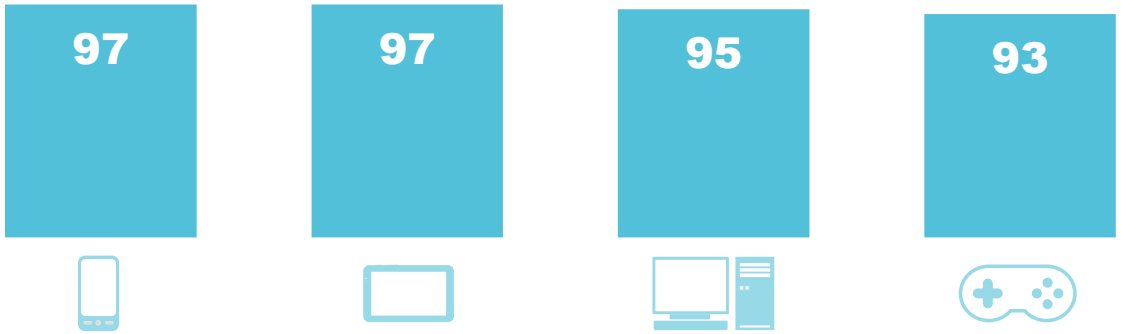
0.5 WOULD LIKE TO BE ABLE TO DO

- 12% — CREATE MAINTAIN WEBSITE
- 10% — EDIT VIDEO
- 4% — SET AND CONTROL INTERNET SECURITY THROUGH BROWSER SETTINGS
- 4% — CLOUD STORAGE

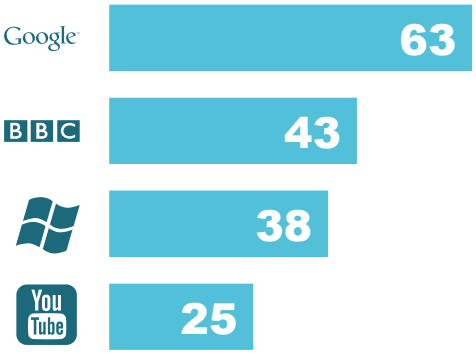
HOW THEY LEARN

44%	Ask other people
35%	Search Google
32%	Learn by trial and error
32%	Follow step-by-step instructions

COMPETENCE OF DEVICE AMONG THOSE WHO USE THAT DEVICE TO ACCESS THE INTERNET *(COMPLETELY ABLE)*



TRUST BRANDS FOR LEARNING



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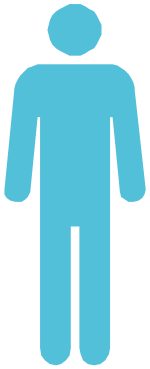
Traditional Followers (12%)

HIGH USER



Age
18-44

Age 25-34
30%

C1

- Friends and family ask my opinion about latest trends
- Sociable
- Feel restricted by what they can and cant do online due to lack of skills
- More likely to rely on help from others to learn new skills
- Getting left behind with lack of knowledge and use of internet
- Don't like to try new things on the internet in case do something wrong
- Wants to learn more about the internet but don't know where to start

2.1 INTERNET DEVICES IN HOUSEHOLD (TOP THREE)

1.6 DEVICES USED TO ACCESS INTERNET (TOP TWO)

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Traditional Followers (12%)

AV 20.9 TASKS COMPLETELY ABLE TO DO

(They are more likely to be completely able to do all tasks)

1.1 WOULD LIKE TO BE ABLE TO DO

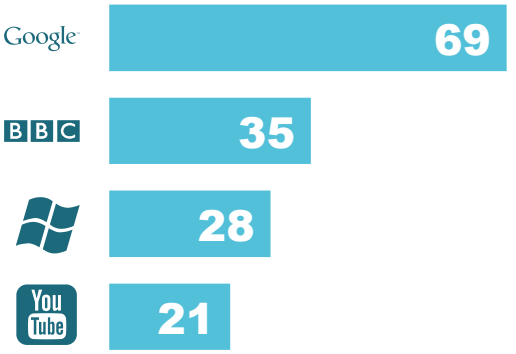
- 16% EDIT VIDEO
- 14% CREATE MAINTAIN WEBSITE
- 6% SET AND CONTROL INTERNET SECURITY THROUGH BROWSER SETTINGS
- 6% CLOUD STORAGE
- 6% VIDEO PHONE CALLS

COMPETENCE OF DEVICE AMONG THOSE WHO USE THAT DEVICE TO ACCESS THE INTERNET *(COMPLETELY ABLE)*

HOW THEY LEARN

39%	Ask other people
27%	Search Google
22%	Learn by trial and error
18%	Follow step-by-step instructions
18%	Visit a particular website

TRUST BRANDS FOR LEARNING



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Trend-setting wannabes (11%)

MEDIUM USER

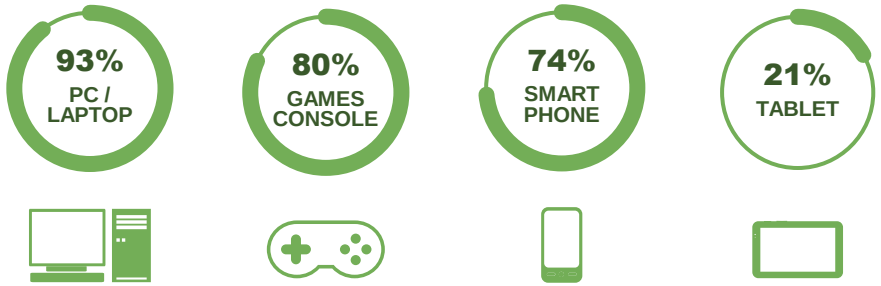
YOUNGER

Age 11-14
26%

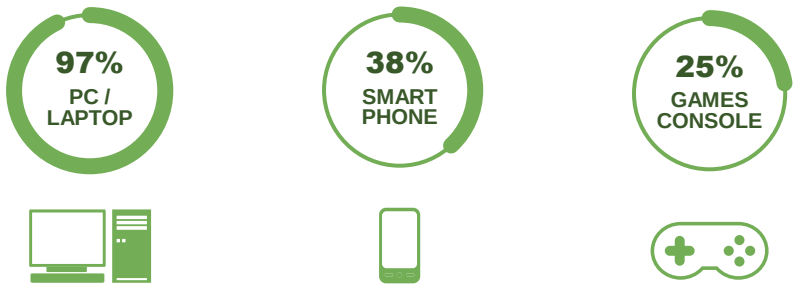
SPREAD OF SEG

- Be the first to try out new technology
- Recommend tech to friends and family
- Friends and family ask my opinion about latest trends
- Spend too much time online
- Don't like to try new things on the internet in case do something wrong
- Wants to learn more about the internet but don't know where to start

4.1 INTERNET DEVICES IN HOUSEHOLD (TOP FOUR)



2.5 DEVICES USED TO ACCESS INTERNET (TOP THREE)



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Trend-setting wannabes (11%)

AV 21 TASKS COMPLETELY ABLE TO DO

(They are more likely to be completely able to play games online)

1.8 WOULD LIKE TO BE ABLE TO DO

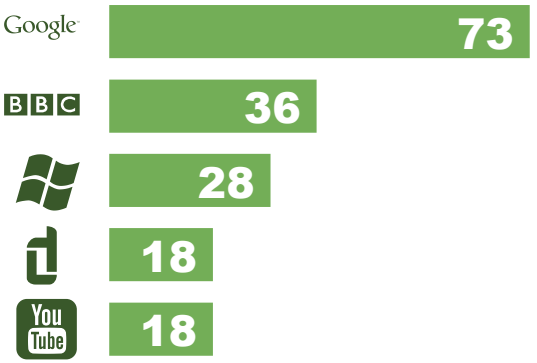
- 23% EDIT VIDEO
- 19% CREATE MAINTAIN WEBSITE
- 15% SET AND CONTROL INTERNET SECURITY THROUGH BROWSER SETTINGS
- 15% CLOUD STORAGE

HOW THEY LEARN

57%	Ask other people
35%	Search Google
34%	Learn by trial and error
29%	Learn from watching others
26%	Follow step-by-step instructions

COMPETENCE OF DEVICE AMONG THOSE WHO USE THAT DEVICE TO ACCESS THE INTERNET *(COMPLETELY ABLE)*

TRUST BRANDS FOR LEARNING



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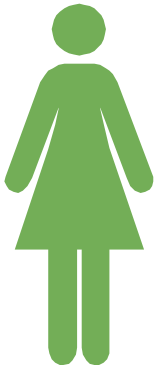
Functional Users (16%)

MEDIUM USER



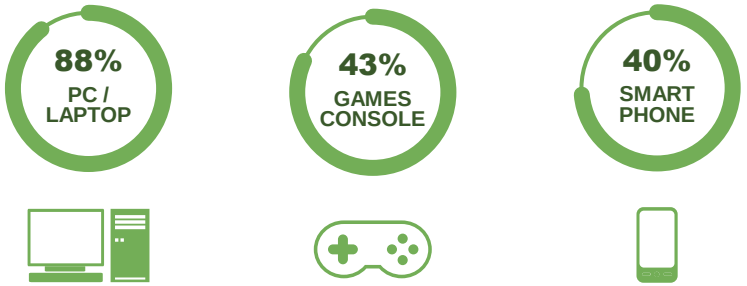
Age
35-54

Age 45-54
28%

ABC1

- Least Tech Savvy
- Sociable
- Like to keep up to date with what is going on around the world
- Like to find out things for self
- Don't like to try new things on the internet in case do something wrong
- Getting left behind with lack of knowledge and use of internet
- Wants to learn more about the internet but don't know where to start

2.5 INTERNET DEVICES IN HOUSEHOLD (TOP THREE)



1.7 DEVICES USED TO ACCESS INTERNET (TOP TWO)

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Functional Users (16%)

AV 16.0 TASKS COMPLETELY ABLE TO DO

(They are more likely to be completely able to do the tasks below)

- SEARCH ENGINE
- EMAIL
- SEARCH/ ACCESS INFO ONLINE
- COMPLETE ONLINE FORMS
- BUY PRODUCTS ONLINE
- SEARCH FOR AND MAKE BOOKINGS
- WATCH VIDEOS/TV SHOWS/FILMS

1.5 WOULD LIKE TO BE ABLE TO DO

- EDIT VIDEO
- CREATE MAINTAIN WEBSITE
- DELETE COOKIES
- CLOUD STORAGE

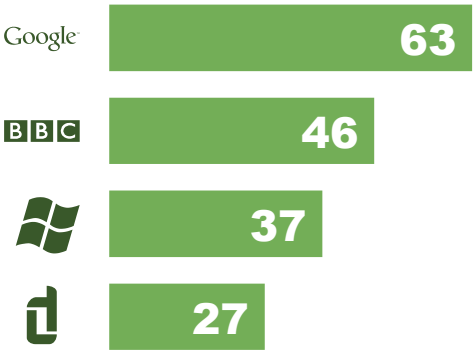
COMPETENCE OF DEVICE AMONG THOSE WHO USE THAT DEVICE TO ACCESS THE INTERNET

(COMPLETELY ABLE)

HOW THEY LEARN

65%	Ask other people
34%	Search Google
29%	Follow step-by-step instructions
25%	Learn by trial and error
20%	Learn from watching others
20%	Visit a particular website

TRUST BRANDS FOR LEARNING



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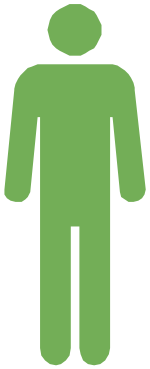
Willing Worriers (14%)

MEDIUM USER



Age
45+

Age 55-64
22%

ABC1

- Enjoy figuring out how technology works
- Be the first to try out new technology
- Enjoy keeping up with current technological trends
- Like to keep up to date with what is going on around the world
- Like to find out things for self
- Don't want to get left behind
- Concerned about online privacy

2.7 INTERNET DEVICES IN HOUSEHOLD (TOP THREE)

1.7 DEVICES USED TO ACCESS INTERNET (TOP TWO)

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Willing Worriers (14%)

AV 17.3 TASKS COMPLETELY ABLE TO DO

(They are more likely to be completely able to do the tasks below)

- SEARCH ENGINE
- DOWNLOAD SOFTWARE
- WATCH VIDEOS/TV SHOWS/FILMS
- DONWLOAD AUDIO/VISUAL CONTENT
- UPLOAD PHOTOS / VIDEOS
- DELETE WEB HISTORY
- LISTEN TO MUSIC
- BUY PRODUCTS ONLINE
- INSTALL SECURITY FEATURES
- EMAIL
- DELETE COOKIES
- COMPLETE ONLINE FORMS
- SEARCH/ ACCESS INFO ONLINE
- SEARCH FOR AND MAKE BOOKINGS

1.2 WOULD LIKE TO BE ABLE TO DO

- 20% EDIT VIDEO
- 19% CREATE MAINTAIN WEBSITE
- 9% SET AND CONTROL INTERNET SECURITY THROUGH BROWSER SETTINGS
- 8% CLOUD STORAGE

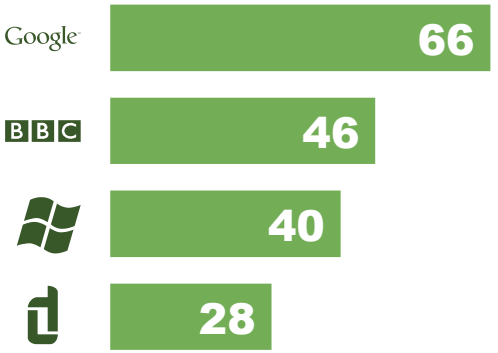
COMPETENCE OF DEVICE AMONG THOSE WHO USE THAT DEVICE TO ACCESS THE INTERNET

(COMPLETELY ABLE)

HOW THEY LEARN

55%	Ask other people
41%	Search Google
35%	Learn by trial and error
33%	Follow step-by-step instructions
32%	Visit a particular website

TRUST BRANDS FOR LEARNING



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Concerned Resistors (21%)

LIGHT USER

Age 55+

Age 65+ 28%

SPREAD OF SEG

- Least social
- Least likely to be able to do all they need/want to online
- Rely on others and courses, etc for help on the internet
- Feels they are getting left behind with lack of knowledge and use of the internet
- Most likely to be able to live without the internet
- Concerned about online privacy
- Don't like to try new things on the internet in case do something wrong
- Wants to learn more but don't know where to start

1.4 INTERNET DEVICES IN HOUSEHOLD (TOP TWO)

1.1 DEVICES USED TO ACCESS INTERNET (TOP TWO)

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Concerned Resistors (21%)

AV 7.1 COMPLETELY ABLE TO DO

(No tasks they are more likely to be completely able to do)

3.8 WOULD LIKE TO BE ABLE TO DO

- 23% SET AND CONTROL INTERNET SECURITY THROUGH BROWSER SETTINGS
- 21% COPY OR MOVE FILES
- 20% DOWNLOAD SOFTWARE
- 19% EDIT VIDEO
- 19% CLOUD STORAGE
- 19% VIDEO PHONE CALLS
- 19% DOWNLOAD AUDIO/ VISUAL CONTENT
- 19% INSTALL SECURITY FEATURES
- 19% CONTRIBUTE TO BLOGS
- 19% UPLOAD PHOTOS OR VIDEOS

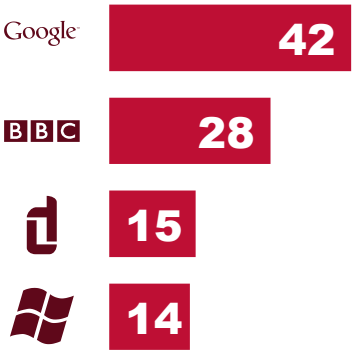
COMPETENCE OF DEVICE AMONG THOSE WHO USE THAT DEVICE TO ACCESS THE INTERNET

(COMPLETELY ABLE)

HOW THEY LEARN

- 53% Ask other people
- 13% Learn by trial and error
- 12% Follow step-by-step instructions
- 11% Learn from watching others
- 11% Search Google

TRUST BRANDS FOR LEARNING



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Mapping the segments on internet usage statements, segment 7 needs most help using the internet

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Focused more on learning we see segments 4, 5 and 7 relying on others & segment 3 not knowing where to start

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Scorecard to show the differences between segments

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Ipsos MediaCT plays a prominent role within media and communications research, holding key industry audience measurement contracts and conducting bespoke research to assist their clients in informing their strategic decisions. We help clients make connections in the digital age, as leaders in providing research solutions for companies in the fast-moving and rapidly converging worlds of media, content, telecom and technology. Using a wide variety of research techniques, we help individual media owners, content owner studios, technology companies, agencies and advertisers address issues such as editorial and programming, advertising, audience profiling and music tastes, market positioning, piracy, high definition and theatrical markets, new product and programme development and license applications.

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