



ADULTS' MEDIA LIVES WAVE 17: 2022

A report for Ofcom
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INTRODUCTION TO THE STUDY

We are living in a connected world. Over the past seventeen years, the internet, smartphones and digital media have transformed our lives.

To complement its large-scale quantitative research tracking media usage and attitudes, Ofcom set out to understand more about individuals' relationship with electronic media – how it fits into their lives, what motivates them to adopt new technology and learn new skills, their usage habits, levels of understanding, issues and concerns about media. To do this they commissioned a small-scale, qualitative ethnographic video research study called Adults' Media Lives.

Each year since 2005 we have filmed interviews with a panel of around 20 people who represent a broad cross-section of the UK population. Through these interviews we've been able to assess the impact of new devices and services on people's everyday lives, and identify new and emerging media literacy issues. We've also been able to follow these individuals on their journey through life and understand more about how these experiences change their needs and shape their attitudes to electronic media.

In many cases these changes have been dramatic, not only inspired by the availability of compelling new devices and services, but also as a result of changes in the lives and domestic circumstances of the individual participants. We have learnt that (for example) going to university, entering or leaving the world of work, becoming a parent, experiencing the break-up of a family or financial hardship are important drivers of changes in participants' relationship with media. Of course, the global pandemic has also been a catalyst to change, not least in terms of the role that communications technology plays in education and the workplace.

Seventeen waves of research have now been conducted; the first was in February 2005, with all the subsequent waves taking place around October each year. Usually, each participant is interviewed in-home for around 90 minutes. However, because of the ongoing Covid-19 pandemic, this year's interviews were reduced in length (to around 60 minutes) and undertaken online via Zoom, as in Wave 16. A total of 20 interviews were conducted between 1st October and 5th November 2021 by Mark Ellis, Lauren Dempsey and Tony Harbron of The Knowledge Agency.

The number of participants in the study is relatively small, but these people are chosen carefully to reflect a broad cross-section of the UK population in terms of age, gender, location, ethnicity and social circumstances. Over half of the sample have participated for 14 years or longer. However, as the profile of the sample becomes – by definition – progressively older, we have regularly recruited new participants at the younger end of the age range, including one this year. In addition, we recruited two further new participants this year to replace people who had left the study.

Certain subjects are tracked each year, for example:

- Acquisition of new media hardware (smart TVs, smartphones, smart speakers, wearable technology etc.) and services (such as super-fast broadband, streaming services, etc.);
- Development of media skills, confidence in the use of digital media, and adoption of new online activities (e.g. sharing content via social media);
- The role of the internet in daily life (e.g. education, work, shopping, banking, interacting with government and other institutions);
- Use of mobile devices to consume content;
- Viewing behaviour and other content consumption;
- Sources of news and information;
- Trust in content and media providers across different media platforms;
- Concerns about privacy, security and safety.

However, the research model is flexible enough to explore specific new areas of interest each year – for example the short and long-term impacts of the Covid-19 pandemic on participants' media usage, home and work lives.

Over the years we have witnessed the real-world impact of some important changes, for example:

- An increased reliance on the internet as many of participants' everyday activities have moved online: shopping, studying, banking, house-hunting, applying for jobs and engaging with public services. For some this has been extremely empowering, but those who don't have access, or the skills to use the internet effectively, can feel disadvantaged or disenfranchised.
- A shift from linear TV to time-shifted and on-demand viewing, and the increased use of streaming services alongside traditional broadcasters.
- A reduced reliance on – and trust in – mainstream news providers, as news consumption has become more fragmented and personalised, and social media has become a gateway to more diverse and unregulated sources of information and influence.
- A shift in privacy issues from worries about personal data being hacked, or private details of their personal lives leaking into the public domain, to concerns about how their behaviour might be tracked and their data used without their knowledge by technology companies.

In short, this study provides rich contextual insight into trends that are observable through large scale quantitative surveys. It also acts, on occasion, as a bellwether, hinting at changes of attitude or behaviour that are not yet observable in other data sources. However, its findings should be read as illustrative and illuminating, rather than as fully representative of the population.

OVERVIEW

Key insights from Wave 17 include:

Impact of Covid-19

For the majority of our participants, life was still being heavily affected by the pandemic at the time of the fieldwork (October–November 2021). Work life was still subject to restrictions, some social activities were still suspended – either by choice or necessity – and there was a tangible level of anxiety amongst many of the older participants in particular.

Although the pandemic had yielded potentially long-term benefits in terms of more flexible working, access to upgraded media technology at home and improved digital skills and confidence for many older participants, there were also downsides. More flexible working had led to some working longer hours, students' learning experience had been compromised and spending long hours on video calls could be exhausting.

The level of interest in staying up-to-date with Covid-related news and information varied widely across the sample. Most participants were aware of being exposed to misinformation and conspiracy theories surrounding Covid-19, but claimed to be confident in assessing and discounting them. However, some participants had also become suspicious about government messaging and the reporting of the pandemic in the news media.

There was widespread recall of the promotion of government information and the labelling of user-generated content relating to Covid-19 on social media, but no participants could recall having clicked through to view the linked NHS information.

Attitudes to technology

Technology was playing a more important role in participants' lives than perhaps ever before – for managing their day-to-day family and work life, as well as communication, information and entertainment. This was partly reflected by how many of them had invested time and money in upgrading home technology devices (e.g. TV sets, laptops/tablets) and services (e.g. broadband).

There was a significant increase in the claimed ownership of wearables, as part of a broader trend towards using technology to track health and fitness. There was also an increase in the ownership and use of smart speakers. These were mainly being used for streaming music but also, in some cases, for listening to radio stations.

Participants have become increasingly reliant on online shopping, particularly as a result of the pandemic. Some expressed feelings of guilt about abandoning their local high street, but this does not appear to have had an impact (yet) on their behaviour.

Most participants claimed to be relatively cautious about which online retailers to buy from, sticking primarily to familiar high street brands or the major online retailers. A few (usually younger) participants were more adventurous, when low prices made otherwise unaffordable products accessible to them, or they were able to find more unusual or specialist products.

Participants expressed a certain degree of ambivalence towards their reliance on technology. Many voiced concerns about the amount of time they (and their family) spend looking at a screen, and the potential impact of this on their physical and mental health. However, there was little real understanding or consensus about how much is too much, or what steps they might take to mitigate the negative effects.

There were many examples of participants deleting social media apps to reduce their dependency on them, or the amount of time they spend using them. However, in almost all cases, the apps were later reinstated or the time saved was quickly absorbed by other social apps/platforms.

Access to communications services and devices

There were many examples of participants upgrading or switching their domestic broadband contract (which was frequently bundled with TV) in the past year, often driven by a perceived need for faster or more reliable home broadband. Quality was considered more important (at the moment) than price.

Upgrading mobile phones had become less important than in previous years. Relatively few participants had replaced their handset; any upgrades tended to be modest. Saving money on calls and data was generally considered a higher priority, but there was also limited enthusiasm for the incremental functionality of new handsets. SIM-only deals were increasingly common.

Haggling for a better deal at the end of their contract period (either for mobile or TV and broadband) has become a familiar experience for many participants, and they expect their provider to make them a good offer to retain them.

Viewing and listening behaviour and attitudes

Most participants have been watching more TV and streaming content in the past year. There was a marked increase in claimed use of the broadcasters' catch-up services (e.g. BBC iPlayer, ITV Hub) and more participants than before had access to subscription streaming services such as Netflix, Amazon Prime and Disney+.

Binge-watching box sets had become more widespread and increasingly common since the first lockdown, even among those who did not previously do so. Participants quickly move on to the next series and this was reflected in the inability of many to recall what they had watched even a few weeks before.

The general consensus across the sample was that there is plenty of good content available to watch, and inspiration for what to watch comes from an increasingly diverse range of sources. Live viewing appears to be on the decline (other than certain specific instances such as live sport), and many participants claimed that they never look at TV schedules anymore.

Viewing is becoming more fragmented and individualised than before. Much of participants' reported viewing was on their own, on mobile devices or as background to other screen-based activities. Organising shared viewing had become increasingly challenging in a world of disjointed lifestyles, on-demand content, box sets and binge-watching.

Participants still consume and value content from the public service broadcasters. The best programmes from the BBC, ITV and Channel 4 (usually high-profile drama series) were described by viewers as being on a par with the best of the content on the streaming services such as Netflix. However, many claimed to be watching less day-to-day programming (e.g. soaps, entertainment shows) on these channels.

YouTube continues to play a prominent role in many participants' viewing repertoire. This includes a variety of different types of content such as news, sport and documentaries, as well as the more obvious 'how-to' videos, vlogs and viral videos.

In-home radio listening via smart speakers and mobile apps appears to be growing at the expense of traditional radio sets.

As participants have spent less time at home post-lockdown, the previously-reported growth in listening to podcasts has stalled, although there remains a hard core of loyal listeners.

Social media, gaming and harmful content

Some participants expressed concern about the amount of time they spend on social media; they were worried either about wasting time or about the impact on their health of excessive screen time. Nevertheless, there were numerous examples of social media playing a central role in participants' major life events (e.g. organising a wedding, setting up a business, moving to a new area).

There was a further decline in the perceived appeal and claimed use of Facebook, but it remains the most widely used social media platform across the sample. There was a marked increase in the use of TikTok and Reddit by some younger participants.

WhatsApp seems to have become the *de facto* standard for messaging across our sample. Since the pandemic it is also being used more commonly for video and voice calling. WhatsApp groups have become an essential organisational tool for many families and workplaces.

Gaming is an important social activity (either online or in person), particularly for the young men (under 40) in the sample. They described their online socialising as taking place either within the chat function of gaming platforms such as PSN (PlayStation Network) or complementary platforms such as Discord. However there were few examples of them interacting with strangers online.

Participants had little experience of being targeted or offended personally by harmful or offensive content in the past year. Nevertheless, most claimed to have seen abuse directed at people in the public eye, especially politicians and footballers. Several felt strongly that more should be done to pursue the perpetrators of such abuse.

Many participants stated that social media companies should be doing more to (for example) remove harmful content from their platforms, enforce user age limits and block bots and trolls. Forcing account users to have a verified public identity was a popular idea, although a few participants had mixed feelings about the implications of this for users who might have a legitimate reason to remain anonymous (e.g. whistleblowers).

Privacy, personal data and security

Attitudes to privacy and personal data have not changed significantly this year. As in previous recent waves most participants described themselves taking some active steps to protect their privacy (e.g. only giving away the bare minimum of personal data required to register for a site or service), but being more *laissez-faire* in other situations where their personal data might be harvested for commercial purposes (e.g. accepting cookies).

A few participants claimed to be more reticent than before about posting publicly on social media. This was sometimes driven by general concerns about their online reputation but also at times by fear of being targeted for online or even real-world reprisals.

Almost all participants were unhappy about the large number of scam emails, texts or calls they have received in the last year. Many of the scams were considered indiscriminate and relatively easy to spot, but others appeared to be more targeted (and therefore credible). In particular, fake delivery messages purporting to be from DPD, Royal Mail, etc. (at a time when most are shopping online more) had caught out several participants.

News

Interest in, and attitudes towards, news vary widely across the sample. We were able to define four clear types of news consumer, with distinct attitudes and behaviours: News Hungry (consuming news from multiple sources and platforms), News Sceptics (suspicious of the mainstream media), News Neutral (no strong feelings about news) and News Avoiders (find news boring or distressing). This is an update on qualitative segmentation analysis originally conducted in 2018, reflecting changes in attitude as a result (in part) of the pandemic.

Many participants were following the major UK national news media less closely than they were this time last year. This was largely as a result of diminished interest in following news about the pandemic. However, the introduction of different rules/tiers by location had led to an increase in claimed use of local and regional news and information sources.

Some participants were critical of the national news media for what they considered to be 'scaremongering', most recently in the context of the petrol shortages of summer 2021. This was symptomatic of a small but significant loss of trust in national news media across much of the sample.

1. IMPACT OF COVID-19

In Wave 16 (for which the fieldwork took place in October 2020) we discovered that the Covid-19 pandemic had impacted participants' relationship with media and technology in important ways. For example, several of the older, less tech-savvy participants had made a significant effort to improve their digital literacy. The pandemic had also acted as a catalyst to changes in working practices (e.g. home working and an increased reliance on virtual meetings) which many believed would be sustained in the long term.

This year, although the fieldwork took place before the outbreak of the Omicron variant and the reintroduction of restrictions, the pandemic continued to cast a shadow over our participants' lives.

1.1 For the majority, life was still heavily affected by the pandemic

The fieldwork took place during a period of few official restrictions, and some of the younger participants considered that their lives were – more or less – back to normal.

Everything's normal for me now. The past year and a half has just been a bit of a dream.

Female, 21, Student, Loughborough

My life feels pretty back to normal, to be honest. I was always going out to work anyway, so I never worked from home.

Female, 33, Doctor, London

However, the majority of the sample felt that their life was still being significantly affected by the pandemic. Many of their previous social activities were still suspended – either by choice or necessity – and face-to-face dealings with work colleagues were still rare and subject to certain constraints.

Before the pandemic I belonged to a bridge club. And I've decided not to play bridge with the club because of the numbers of people with whom you are sitting... across a table for several hours at a time.

Male, 77, Retired, Warwick

All the different groups I was in – that all stopped. They started off 'Oh, we'll do Zoom meetings'... and that was all right for a couple of months. And then it just petered out. One dropped off and another dropped off.

Female, 77, Retired, Edinburgh

Even if it's a one-on-one meeting over a coffee outside, I still have to do a risk assessment. And they all have to be logged and checked and signed off, so it's not easy to do life as it was, if you like.

Female, 44, Fundraising Manager, Cardiff

There was a tangible level of anxiety among many of the older participants in particular, and an expectation that one or more further waves of infection – and associated restrictions – were inevitable. The 'blitz spirit' of the first lockdown had waned during the second and third, and the more pleasurable aspects of lockdown – time at home, the ability to spend quality time (even if only virtually, in some cases) with friends and family, etc. – were either no longer possible, or their novelty had worn off. Several (male) participants voiced concerns about their mental health. Isolation and loneliness remained a fear both for participants themselves or in relation to friends and family.

Because I worked from home for so long, you kind of lose people skills and develop a few social anxieties, which I was coming to understand about myself. When I would go out in a social situation, I would suddenly start to feel a bit anxious.

Male, 22, Betting Odds Trader, Leeds

I loved it at first. I loved the first lockdown, but the second one I found it quite a bit harder. I was just stuck in a room, just going crazy, really.

Male, 32, Labourer, Colchester

It's such a fantastic gift life, and I don't want to live it in fear of something happening.

Female, 55, Housing Officer, Coventry

1.2 There are positive and negative aspects to the 'new normal'

Participants discussed several perceived indirect benefits of the pandemic.

Because of their increased reliance on the internet during lockdown, many had upgraded devices or their broadband/TV packages in the past year. As a result, they were now able to enjoy the benefits of better technology at home.

We had to think about what sort of TV the kids were going to have, something that would be a bit more educational than the norm... Each of us had to have a laptop, the little one had the iPad, so we had to buy enough devices to go round.

Female, 44, PA, Woking

I was doing my management training for fourteen weeks and I wasn't able to go home in that time, so video calls to my parents and sisters were still going on... They have a Google Portal in the living room... They all sit on the sofa... It shows a wide view of the living room so you can see everyone, then when my mum talks it will zoom in on her.

Female, 21, Nurse, Belfast

Having upped their technology skills last year, our older participants (and older relatives of other participants) had maintained these skills, and were still enjoying the benefits of this, particularly in terms of being able to keep in touch with friends and family.

Change doesn't have to be bad. New things... some work, some don't. But the one thing it has taught me is to embrace it more.

Female, 55, Housing Officer, Coventry

You know, I wouldn't want to go back. I don't know why I was frightened.

Male, 67, Semi-retired, Pinner

They're getting quite savvy on it, to be honest. I say "they"... I would say Mum to be honest, because my dad could do with a keyboard that just had an O and a K and a thumbs up.

Female, 44, Fundraising Manager, Cardiff

More flexible working practices and the option of (e.g.) attending school parents' evenings virtually were seen as a real boon to parents in particular.

The school has continued with doing Zoom meetings online, which has helped a lot because they used to do them during school hours and lots of us who are working could never attend any of the meetings... Last night they had parents' evening where you could choose either to go into the school, or do it online... I chose to do it online.

Female, 44, PA, Woking

I've been pretty fortunate with the tutoring in that it has been very easily transferable online... even now that things have sort of opened up, I'm only doing one or two face-to-face lessons a week, max.

Male, 25, Tutor, London

On the downside, more flexible working had led to some participants working longer hours and finding it increasingly difficult to separate work and home life. Spending large amounts of time on video calls was felt to have the potential to be physically and mentally exhausting.

I've had to change my hours, so I start at seven in the morning to work for APAC and then UK in the mid-morning hours, Japan and then on to the US in the afternoon and then leave it and come back the next day. So it's quite full-on.

Female, 44, PA, Woking

There are days where I literally can be doing stuff like this for, I would say, 90% of the day, and that's not an exaggeration. You do come off exhausted by it.

Female, 44, Fundraising Manager, Cardiff

Home schooling had been particularly challenging for some working parents, and some of the students in the sample felt that their learning experience had been compromised by the restrictions. Some young participants in the early stages of their career also felt that their career development had been adversely affected.

It was really tough. School hadn't worked out any media technology, nothing. It was "Here's all the work... Get on with it." It was a disaster. He just wasn't motivated to do it. It meant I was shouting because I couldn't cope with the stress of trying to hold down a job, look after him and try and teach him.

Female, 44, PA, Woking

Everyone I know just sat in bed. At the end of the lesson, the teacher said "You can leave now", and they would still be in the lesson because they were asleep.

Male, 17, Student, Manchester

I've been working with my team for seven months, almost eight, and I've only met them in person once. So I'm looking forward to actually just seeing people in the office.

Female, 28, Solicitor, Edinburgh

Lastly, there were specific instances where the transition to conducting life online had been problematic for certain participants. One in particular was very uncomfortable with the idea of virtual GP appointments.

I've got a wee thing here on the side of my face; it's like a wart... So I phoned the doctor and he said "No, you can't come in and see us. What is it like? Take a picture of it." And I said "You're having a laugh. How can I take a picture of this on my own?" So I got my neighbour to come round and take a picture of this thing on the side of my face... Then I had to go online. I found it very difficult to transfer from here to the doctor. Normally the doctor would have a good look at it... I just gave up... It is frustrating, really frustrating.

Female, 77, Retired, Edinburgh

1.3 The level of interest in staying up-to-date with Covid-related news varied widely across the sample

In Wave 16 we observed that some participants had become less interested over time in staying up-to-date with news of the pandemic. This year the level of interest varied more widely. Some participants were following the pandemic closely, whereas others were either fed up with the blanket coverage or confused by the presentation of the data, and now claimed to largely avoid it.

I'm really interested in the pandemic, probably being from a little bit of a science background. I'm interested in how it's all moving and where it's moving to.

Female, 44, PA, Woking

It's very, very difficult to understand certain parts... You've got the government saying one thing and then people that work for the government are saying another thing. The NHS are saying something else... We're not all educated to that level of how information is being delivered... it can be quite mind-blowing.

Female, 55, Housing Officer, Coventry

It used to annoy me that Mum would religiously have the news on every single night. If you ever did get it out of your head it was quickly back in there because of the depressing announcements they would make about x amount of cases or deaths... Now it's my own house I can decide what I want to watch... I haven't watched the news since I moved out.

Male, 22, Betting Odds Trader, Leeds

Most participants were aware of being exposed to misinformation and conspiracy theories surrounding Covid-19, but claimed to be confident in assessing and discounting them. However, some participants who (based on their comments in previous waves about conspiracy theories before the pandemic) we would have expected to be more open to (e.g.) anti-vax theories clearly felt reticent about expressing such views, perhaps fearing that they have become socially unacceptable.

You can't swing your handbag without, you know, everyone talking about... what they call them... anti-vaxxers... I'm the sort of person that I don't take on too much of the chatter. I like to do my own research.

Female, 60, Unemployed, London

Moreover, some participants claimed to have developed a degree of suspicion of government messaging and the reporting of the pandemic in the news media.

At first I was watching the daily briefings, but it all got a bit much... I think the media were pretty irresponsible... and drummed up a lot of anxiety in the public... For a while this year it felt like "Well, where are we supposed to get any sensible information about this?"

Female, 33, Doctor, London

You have to take it at face value. They say the hospitals are packed, but my son was working in the hospitals and he said that there's hardly anyone in there. So you don't know who to believe.

Male, 60, Alarm Fitter, Lisburn NI

Politics is normally very important to me, but you know what? Everything is just pointless because I don't think it matters who you vote in or what you do. They're all going to be morons.

Female, 48, Stay-at-home Mum, Chelmsford

There was widespread recall of prominent labelling of Covid-related content on social media and links to NHS information, but none of the participants could recall having clicked through to view this information.

On a lot of Instagram posts, if they ever mention anything to do with Covid, even if it's a little joke, they'd always have at the bottom like a picture saying "This is a Covid source. Click here for more details" or something.

Male, 17, Student, Manchester

It automatically had a link that you could swipe up, and it had all the NHS information on Covid. I've never clicked on them. And I don't know, I just feel like I don't really pay attention to them.

Female, 28, Solicitor, Edinburgh

2. ATTITUDES TO TECHNOLOGY

This year, technology had become more important than ever in participants' lives – for managing their day-to-day family and work life, as well as communication, information and entertainment. This was reflected in how they had invested time and money in (e.g.) upgrading devices and services, or pushing older relatives to be digitally independent. New technologies (e.g. smart devices) are becoming more popular and attitudes to established technologies are evolving.

2.1 There was significant growth in the use of smart devices

There was an increase in the claimed ownership of wearables (predominantly Apple Watches) compared to previous years. Around a quarter of the sample now claimed to own and use such a device. This forms part of a broader trend towards using technology to track health and fitness. Most were not using their smart watches for much other than health tracking and (in some cases) basic messaging tasks.

I love my Apple Watch, I use it all the time. I have a move goal and a stand goal and an exercise goal. And then the rings close. So obviously each day I'm trying to make sure I hit my rings, and I track my workout in the gym or track my walks.

Female, 21, Student, Loughborough

I go running two or three times a week and I use Strava for logging where I go and keeping an eye on my times.

Male, 47, Engineer, Rural Derbyshire

It's nice to get the messages on here so I can see them if I'm not with my phone... A message comes up and if it's my mum or my dad I know whether to go and get my phone to answer the message.

Female, 21, Student, Loughborough

There was also an increase in the ownership and use of smart speakers. These were now in the homes of over a third of the sample, with some households owning multiple devices. They were mainly being used for music streaming but also (in some cases) for listening to radio stations.

When I'm here on my own and reading a book or something, I'll put on some music that I like. It's mainly ballads.

Female, 77, Retired, Edinburgh

The music platform that we use is Apple Music and that is plugged into the Echo devices that we have. So the kids can access that music through there. They've got Echos themselves.

Male, 42, Web Officer, Cardiff

My Mum had one and we really liked it. I liked that I could ask her [Alexa] for any kind of music, and that was the initial thing that I got it for – the music. We bought the package so that we can have all the music. I then find it easier when I'm working. I can just shout to her 'Alexa, do this for me'. It's mainly to set alarms... I also use it for the radio, mainly listening to Radio 2.

Female, 44, PA, Woking

I'll get the news update from the BBC first... I'll ask the Echo device [for that]... And then after that I'll probably put Radio 5 or Radio 4 on... It's less about the music, more the current affairs stuff.. We've got a DAB radio in the house, but we don't really switch it on anymore. In fact, I can't remember the last time we did. It must have been months ago.

Male, 42, Web Officer, Cardiff

2.2 Participants are becoming increasingly reliant on online shopping

Most participants claimed to be shopping more online or using 'Click and Collect' services, for a wide variety of goods. Convenience and protecting themselves from Covid-19 were the primary reasons cited for this change in behaviour, but increased choice and the availability of goods you wouldn't be able to find otherwise were also given as reasons for shopping more online.

It was so easy. Oh my gosh, it was so easy to order stuff sitting in front of the fire, glass of wine, order away.

Female, 55, Housing Officer, Coventry

I've got a stack of parcels here that I need to take back after this call. I'm still doing it, it's terrible. Whereas I would have gone to the shops before and tried things on, now we just get things delivered and try things on and send them back. It's too easy.

Female, 33, Doctor, London

You could say that's lazy [Click and Collect]. But also, do you know what? Do I really want to walk around the store with everybody? Can't I just go to customer service, grab what I need and go back out again? And that has been my attitude to food shopping as well.

Female, 44, Fundraising Manager, Cardiff

Some participants expressed feelings of guilt about abandoning their local high street, but this does not appear to have had an impact (yet) on their behaviour.

We do try and support our local bookseller, but then I have to walk into town. But I can buy the thing online. And the selection is amazing, really.

Male, 77, Retired, Warwick

It's very sad, and I want to try and be better this year at supporting our local businesses.

Female, 55, Housing Officer, Coventry

When it comes to the choice of retailer, most participants claimed to be relatively cautious about which online retailers to buy from, sticking primarily to familiar high street brands or the major online retailers such as Amazon.

I'm mostly on Zara, Missguided, PLT, boohoo, ASOS – they're the main ones, they're the apps I've got. And they're the ones I use all the time and I find that easiest to do just because all my payment methods, addresses, discount codes, vouchers, everything is set up.

Female, 28, Solicitor, Edinburgh

A few (usually younger) participants were more adventurous, particularly when the perceived benefits of (e.g.) much lower prices or the ability to buy products you could never find in the shops outweighed any potential risks.

I've discovered this website called Etsy, which I really like. I mean, a lot of it just seems to be people that have invested in a 3D printer and are basically using that to make money... I've become, I think, a lot more of a nerd over lockdown. So I've invested in this giant board game called Lord of the Rings: Journeys in Middle-Earth. Because it's quite a popular board game, on Etsy, a lot of people make quite cool things, so there's like these little holders for your character cards and stuff.

Male, 25, Tutor, London

Sometimes things come [from Shein – a Chinese fashion retailer] and they don't look anything like they did on the website... If you're under time pressure and there isn't time to send things back, that can be really annoying... If one thing comes and it doesn't fit then you've got to try and get something else really quickly.

Female, 21, Nurse, Belfast

2.3 Whilst recognising its importance, many participants have mixed feelings about their reliance on technology

Whilst recognising the importance of technology and acknowledging its benefits, participants also expressed a certain degree of ambivalence towards their reliance on technology or the time they spend using it.

In particular, many voiced concerns about the amount of time they (or their children) spend looking at a screen, and the potential impact of this on their physical and mental health. However, there was little real understanding or consensus about how much is too much, or what steps they might be able to take to mitigate the negative impact of excessive screen time.

My screen time is probably way too much, but you know, that is a symptom of the fact that every hour I teach now is on the screen. All of my admin is done through a screen. Everything I watch is through a screen.

Male, 25, Tutor, London

I've seen how people are completely consumed... We lost my husband to his phone. That's all he does. He comes home, he doesn't really talk. He just sits on his phone looking at whatever he enjoys looking at. And I've watched now the children starting to be like that... with the iPad.

Female, 44, PA, Woking

One of the problems that I have is that that my eyesight is struggling if I'm working on screens too long. And so I have to break off... There's the 20:20:20 rule isn't there? You use the screen for 20 minutes, then you look away for 20 minutes and then, I don't know, do you have a cup of tea for 20 minutes?

Male, 77, Retired, Warwick

One parent expressed particular concern about her son and his friends spending so much of their time in a digital environment and the impact of this on their health, education and aspirations.

With the ten year old, he constantly watches... people gaming. I don't understand it... I can't understand why would you watch someone playing a game? He is so drawn into it. It's like another world to him and he just gets sucked in. You cannot get him off. It's so hard. He then – and most of his friends – think that that is the way of life, that you can be a YouTuber, you can make videos and you're going to be a millionaire... I've had to really be quite harsh and say "No... that's not a career".

Female, 44, PA, Woking

There were many examples across the sample of participants deleting social media apps either to reduce their perceived dependence on them, or the amount of time they spend using them. However, in almost all cases, either the apps were later reinstated, or the time previously devoted to them was just absorbed by other social apps/platforms.

It's just so natural just to pick my phone up. Sometimes I don't even know what I'm going on, and I'll just click on something and then just find myself scrolling. And even when I deleted Instagram, I was spending more time on TikTok.

Female, 21, Student, Loughborough

I tried it [TikTok] for a couple of months and then decided "This has to go" because I was spending all my time scrolling, and I was getting nothing done. So I deleted it for a while, and when I finished my degree I thought maybe I would try it again... and I still have it... You can just find yourself scrolling for hours.

Female, 21, Nurse, Belfast

3. ACCESS TO COMMUNICATIONS SERVICES AND DEVICES

The pandemic has also influenced participants' behaviour as communications consumers. Purchase decisions around technology hardware and services have taken on more significance as participants' dependence on such technology has become greater.

3.1 There were many examples this year of participants upgrading and switching domestic broadband and TV contracts

As we have already seen, home technology has taken on an increased priority since the start of the pandemic. A (perceived) need for better access to the internet had led several participants to upgrade their broadband service in the past year.

Our broadband has gone back to BT. We had gone to Now TV. It was about half the price, but the wi-fi was rubbish... I couldn't pick it up at all, the kids were moaning like mad. We have gone back to BT. It's a bit more expensive but [son] has volunteered to pay the extra. It's just so much better.

Male, 47, Engineer, Rural Derbyshire

We switched to Sky, but it was quite slow because they didn't do fibre-optic broadband; it was limited to a certain speed. We were about six months in [to the pandemic], and we'd just had enough. No-one could do their work. My siblings were struggling to do their uni work because they were at home as well. So I said "Why don't we just switch?" We took the risk, went back to Virgin, and it has been brilliant.

Male, 17, Student, Manchester

It was my lodger who really firmed me up on it because she needed it for work. I couldn't afford not to have any internet... so I decided it was time to leave [current provider].

Female, 60, Unemployed, London

In some cases, as above, this involved a switch in supplier; in others participants opted to stay with their current provider, but on an upgraded contract. When changing, participants claimed that the quality of their broadband service was their number one concern. Price was less of a factor.

Hitherto I was with BT paying, I think, an excessive amount because I was out of contract... I've still got this fear of IT... I don't particularly want to leave the company because you do hear some horror stories. I had to remember that I was reliant on my internet. So I couldn't skimp by having a cheap internet because I've got a business... I've got this job. And, you know, I'm a great believer if technology is working, don't touch it... The risk of something outweighs the benefits.

Male, 67, Semi-retired, Pinner

'Haggling' for a better deal at the end of their contract period (both for broadband/phone/TV and mobile phone/data packages) has become a familiar experience for many participants, and they expect their provider to make them a good offer to retain them.

When the price went up, I had to decide whether or not I was going to stay with them. I had to threaten that I was going to go to another provider. I said "Look, we can do this to everyone's benefit. I enjoy your services and I've never once owed you for one day, so it would be good if we can arrive at an agreement. Give me a good offer." And they did. So I'm still a customer.

Male, 40, NHS Support Worker, Liverpool

We've got more for paying less... When you phone Sky the best thing you can do is press to say "We're leaving" because you actually get to speak to somebody. We got a really good package. It did come to slightly more by the time you included Disney but that didn't bother me because I wasn't paying for it. It's a shame. I don't like to live life threatening people but that's what it is – a threat. "I'm going to be leaving unless you do me a deal!"

Female, 55, Housing Officer, Coventry

3.2 Upgrading and switching mobiles

Several participants had switched mobile network in the past year. Notifications from their provider meant that participants were generally well aware of when their contract was up for renewal. Saving money on calls and data was the priority for most participants. (This should perhaps be viewed in the context of increased spending elsewhere, on broadband and home technology.)

I've gone to GiffGaff for my mobile and they give you a goody bag [based on] how much you think you're going to spend in that time. And it has worked out OK. It's a lot cheaper than I was paying before.

Female, 77, Retired, Edinburgh

I was paying £10 for six gigabytes a month. But that wasn't really the hookline The hookline was that it's unlimited social data. So Snapchat, Instagram. I remember, before that SIM, I'd always turn my data off and be careful, but now it's always on. I don't even remember turning it off, ever.

Male, 17, Student, Manchester

It is becoming more common for participants to buy their handset outright and choose a SIM-only deal.

We changed our phones, different provider and we ended up buying them. We bought the two Huaweis and now we pay £9 a month, but it is giving us something like eight gigabytes... which is more than double what we had.

Male, 60, Alarm Fitter, Lisburn NI

I guess buying the hardware gave me more flexibility in terms of who to go with for contracts. It doesn't tie me in. So I've now got the hardware cost, which is very little really a month, and then a tiny amount every month for the SIM card.

Male, 42, Web Officer, Cardiff

Compared to earlier waves, relatively few participants had upgraded their mobile handset. Upgrades were largely born out of necessity, and were generally modest; indeed, one had bought second hand (a continuation of a trend we first observed in Wave 16). Only one participant had acquired a top-of-the-range handset, and the incremental functionality of new handsets appeared to be of limited appeal at this moment in time.

I just walked into the shop to be honest and said "I pretty much only use WhatsApp. I watch YouTube at home on wi-fi. I don't really do anything else on the phone. I make a couple of phone calls here and there. What's the best deal? " And then he shows me this Galaxy A25... It's quite a good phone. It's all I need. I don't need anything better. My father's got like a Galaxy S10 or S11, quite a new one. He doesn't even know how to use WhatsApp.

Male, 32, Labourer, Colchester

This iPhone, the new one you've got now... my old phone is giving me the same thing. So I don't see the reason why I'm going to need another phone for now.

Male, 40, NHS Support Worker, Liverpool

Whenever I've got a new iPhone, it's just the same... it just loads everything up again and it just looks exactly the same... I have no desire to upgrade at all, really.

Female, 28, Solicitor, Edinburgh

4. VIEWING AND LISTENING BEHAVIOUR AND ATTITUDES

Fragmentation and personalisation of viewing experience are long-term trends we have reported consistently over the past ten years. Both weight of viewing and the breadth of on-demand streaming content to which most participants now have access have contributed to an acceleration in this trend over the past year.

4.1 Most participants have been watching more TV and streaming content in the last year

Most participants claimed to have watched more TV and streaming content since the start of the pandemic, and this period seems to have acted as a catalyst for changes in what and how participants watch.

During Covid I would say that I used the TV more... When you spend more time at home you have to find something to keep yourself busy, to get yourself out of boredom... Consuming media, watching TV, is what we did... Since Covid it has changed, but not that much. We still use all those things.

Male, 40, NHS Support Worker, Liverpool

We've probably watched more telly over these past 18 months than we ever have. I think it has changed our viewing habits... to be honest, because we never used to binge-watch anything, really.

Female, 44, Fundraising Manager, Cardiff

There was a marked increase in the claimed use of the broadcasters' catch-up services (e.g. BBC iPlayer and ITV Hub), and more participants than before had access to subscription streaming services such as Netflix, Amazon Prime Video and Disney+ across the sample (18 of the 20 used Netflix, 11 used Amazon Prime and 7 used Disney+).

Somebody will say "Have you seen such and such", and I'll be "No, I never had the telly on last night". And then I'll go on and use catch up. And I've got Netflix as well.

Female, 77, Retired, Edinburgh

This growth had partly been facilitated by the sharing of accounts between family and friends (sometimes, but not always, within the same household). In many cases they had struck a *quid pro quo* deal between them to split the cost of subscriptions.

The way we work it is [boyfriend's] sister pays for Netflix and we pay for Disney+. So then we can use her Netflix, and she uses our Disney+, so that we're not both paying for both.

Female, 21, Nurse, Belfast

[Housemate] has got Amazon Prime, so I don't need that. We use his for that. Netflix is mine. I'm getting absolutely robbed blind. I let [girlfriend] use it, and another lad who doesn't even live here anymore. He lived with me a couple of years ago, but I still see him using it... and Mum as well.

Male, 22, Betting Odds Trader, Leeds

Netflix was the TV channel or service most commonly cited as participants' first choice or 'go-to' service.

If I'm just watching like a five second thing, I just turn on a YouTube video. If I'm wanting to watch a movie, most of the time it'll be Netflix.

Male, 17, Student, Manchester

BBC iPlayer? I watch that sometimes if I've got nothing going on Netflix or I can't find anything else to watch on there.

Female, 28, Solicitor, Edinburgh

Binge-watching box sets had become more widespread and increasingly frequent since the first lockdown, even among those participants who did not previously do so.

I've found myself watching maybe four or five [episodes] in a row... You don't see the time going on... If you see something you're interested in, you'll keep watching and watching.

Male, 60, Alarm Fitter, Lisburn NI

The fifth part of Money Heist came out a couple of weeks ago and we binge-watched that, I think, in two days. And we had waited so long for it. So we were quite annoyed at ourselves then when we watched it so quickly.

Female, 21, Nurse, Belfast

I have been watching quite a few things of late. I watched Squid Game because I was getting so fed up of everyone talking about it and me not knowing. And so I binge-watched that, which took eight or nine hours.

Male, 22, Betting Odds Trader, Leeds

We watched how many episodes was it the other day... 26. We did a marathon of EastEnders. I've not been sleeping.

Female, 48, Stay-at-home Mum, Chelmsford

One side-effect of this seems to be a change in participants' ability to recall programmes they had previously watched. In a marked shift compared to previous waves, many visibly struggled to remember what they watched even a few weeks ago.

I can watch something in days and just forget about it. And then also things merge into one.

Female, 21, Student, Loughborough

It's a bit of a blur, to be honest, because we go from platform to platform.

Male, 42, Web Officer, Cardiff

4.2 Inspiration for what to watch comes from an increasingly diverse range of sources

The general consensus across the sample was that there is plenty of good content available to watch.

Inspiration for what to watch comes from a diverse range of sources. Some participants explained that they do still flick through the channels or browse the EPG on occasion, but less often, and many claimed that they never look at schedules anymore, relying variously on recommendations and "trending" shows on their viewing apps, trailers and word-of-mouth (including social media hype) for inspiration.

I'd probably look at the guide just to get an idea of what's on, to see if there's anything inspiring. It's a bit like looking at a menu, isn't it? Then, when the kids have gone to bed, I'll look through Netflix or Amazon.

Male, 42, Web Officer, Cardiff

I like the fact that, on Netflix, it has "Trending Now", and it will tell you the top ten things that people are watching. Then you know that they're good.

Female, 21, Student, Loughborough

If I was by myself then Disney would be my go-to, but if we were watching together, for a TV programme or a movie it would be Netflix. It's good that Netflix suggests things based on what you've watched before, so we would just usually flick through the "Suggested For You" and find something there. Even if we're in the middle of a series and something comes up and we like the look of the trailer we'll add it to our list. Then when we've finished watching the series we'll go to our list and start watching it, to see if it's any good.

Female, 21, Nurse, Belfast

[I get inspiration] from social media and through word of mouth as well. I was actually round at my friends last night and I made a list on my phone of film recommendations... things they've watched.

Female, 28, Solicitor, Edinburgh

Lockdown also appeared to have influenced viewing choices. There were numerous examples of participants specifically choosing to view certain types of escapist content in response to the pandemic, and discovering new interests through having more time to watch.

It tends to vary. It depends what phase I'm in. I've been watching Modern Family with [wife], which is just easy watching, something to help you chill out. I've also been watching Amazing Vacation Rentals on Netflix just because I've got a huge wanderlust at the moment... I really want to get away, I want to go on holiday.

Male, 42, Web Officer, Cardiff

Me and [boyfriend] have really got into Formula 1 in the last year... We watched Drive to Survive on Netflix... it's very good. We both like cars but we weren't into Formula 1 before that; now we're both obsessed. Now of a weekend we pay £10 for a subscription to watch the races.

Female, 21, Nurse, Belfast

4.3 Viewing is becoming more fragmented and individualised than before

The traditional paradigm of a family group crowded round the TV – as portrayed in programmes like *Gogglebox* – is unrepresentative of the majority of viewing reported by participants in this wave of research. Much of their reported viewing was on their own, on mobile devices or as background to other screen-based activities.

This is not new – we have been reporting a similar trend for the past ten years, as the provision of on-demand video content, the availability of faster home broadband and wi-fi, and access to a range of devices capable of streaming video content have all grown. This year, however, the trend seems to have accelerated.

If I'm home at the weekend in my [parents'] house and I can't get the TV because it's being hogged by other people, I have the Disney+ app on my phone, because I don't have a TV in my bedroom at home.

Female, 21, Nurse, Belfast

We'll both be sat on our laptops at the same time, but on the sofa with the TV on in the background.

Female, 33, Doctor, London

I just put the football on my phone and then prop it up on the cushion so it's in my eyeline, as well as watching something on TV together [with wife]. So it sort of pacifies both of us, we're both happy that we're sat watching something and I can still watch my football.

Male, 47, Engineer, Rural Derbyshire

Again, in line with the trend we have witnessed across multiple waves, participants claimed to view little live TV. The main exceptions were news bulletins and Covid briefings (though less commonly than last year), and major sporting events. There were more sporadic mentions of other programme types, including discussion, reality, entertainment and quiz shows; participants sometimes described themselves watching these as a background to other activities, or as a distraction from their anxiety about the pandemic.

We seem to have totally got out of the habit of watching a programme when it's actually on.

Female, 44, Fundraising Manager, Cardiff

I definitely do prefer to watch series where I've got my own control. Because of my job as well. If it's on on a Monday at nine, for a normal person, that's fine. If you are working a half two to eleven shift like me, then you can't watch it.

Male, 22, Betting Odds Trader, Leeds

In the morning I'll watch Jeremy Vine, and after that I'll put music on. But then I do like the reality shows... things like Married At First Sight.

Female, 60, Unemployed, London

In recent weeks I've been looking at the odd quiz programme. Because of the pandemic, and the removal of social contact, my tastes have changed. I've got more of an inclination to look at feel-good programmes.

Male, 77, Retired, Warwick

In some cases, traditional peak viewing slots (e.g. Saturday night light entertainment programmes like *Strictly Come Dancing*, Sunday evening dramas such as *Vigil*) continued to be treated as appointment viewing. However more participants than in previous waves claimed to watch even these programmes on-demand.

If it's a yucky afternoon and it's pouring with rain outside I would look through the catch-up and see what I've missed... but in the evening I would go onto the guide and see what's on. Usually there's some quite good dramas on at nine o'clock. After that I'd go to bed.

Female, 77, Retired, Edinburgh

[I only watch] Bake Off and Strictly really... Just because they're nice winter programmes to have on, kind of festive... And my friends talk about them so it's good to know who they're talking about. I'm rarely here on Saturday night to watch Strictly so I watch it by myself at another time. And I think there have been three episodes of Bake Off so far and I haven't managed to watch any of them, so this evening I'll go back to the start.

Female, 33, Doctor, London

Organising shared viewing had become increasingly challenging in a world of on-demand viewing, box sets, binge-watching and fragmented lifestyles. Restrictions on meeting up with people from other households during the pandemic had exacerbated this issue.

One way me and [girlfriend] stay close to each other – because she's in Manchester and I'm in Leeds – is to watch a series together, but in different households. So we'll plan a time that we'll both be free to watch... That's how we watch Vigil, things like that.

Male, 22, Betting Odds Trader, Leeds

In an ideal world, as a house, we'd pick a series and we'd watch it. But the issue is you can never trust someone not to skip ahead a few episodes. So generally, if we're watching something together, we might watch something where there's not an overarching narrative and you can dip into an episode here and there.

Male, 25, Tutor, London

In the case of a box set they might want to watch together, keeping in sync with a partner who works different shifts or lives separately can prove challenging.

We try to start a series together. So then when we're together, we watch it. But it gets really annoying because if he's at work and I want to watch something I can't, because the thing that I'm watching, I should really watch with him.

Female, 21, Student, Loughborough

If we're off doing separate things we'll always watch on without the other one, which I think is bad etiquette.

Female, 33, Doctor, London

Faced by this challenge, some participants described themselves consciously segmenting programme choices between 'for me' viewing, and shared viewing with a partner or housemates.

I try my best to sometimes watch things with my girlfriend and have a series to watch with her, but I tend to find that I have to choose something I'm not that interested in, because I tend to only see her at the weekends and once a week is just not enough. So if it's a series that I'm really enjoying, generally, I'll watch that on my own.

Male, 25, Tutor, London

4.4 Participants still consume and value PSB content, but they are starting to consume it differently

Most participants continue to consume at least some content from the BBC, ITV and Channel 4, and they continue to value these services. The best PSB content (usually the high-profile drama series on these channels) was described by viewers as being on a par with the best of the content on streaming services such as Netflix.

I've been watching more dramas. I watched Vigil. I loved that.

Female, 77, Retired, Edinburgh

I like the four-part series. Mainly BBC do a lot of them. ITV are doing one at the moment I'm watching called Angela Black, which I'm really enjoying.

Female, 44, PA, Woking

One notable change, however, was that viewers claimed to be watching more of their PSB content than before via BBC iPlayer, ITV Hub and All 4, rather than the TV channels, either live or recorded. Many claimed to use these streaming services increasingly as they do Netflix – browsing the user interface to look for new programmes, and watching series as box sets – rather than as catch-up services.

I never get to watch anything live. It's never the right time round here. So yeah, everything I watch is on iPlayer or ITV Player.

Female, 44, PA, Woking

I definitely think that services like Netflix and Amazon have influenced my behaviour with terrestrial TV.

Male, 42, Web Officer, Cardiff

I wouldn't say I watch Channel Four, I watch 4OD – or All4 I think it is – or BBC iPlayer.

Male, 25, Tutor, London

Over recent years of the study the number of participants who do not have a TV licence has been growing, as younger participants in particular have argued that a TV set (or, at least, one connected to a traditional TV service such as Freeview, Virgin, Sky or BT) is no longer a necessity. However, this year we witnessed a reversal of the trend as two participants who previously didn't have a TV licence had now bought one.

Last year I didn't actually have a TV in my room... now we have smart TVs in every room I'm watching a lot more TV... but not the channels – we'll just click onto Netflix, or Amazon Prime, or BBC iPlayer... and we don't have to worry about watching it because we've got a TV licence this year.

Female, 21, Student, Loughborough

This does not necessarily reflect a broader change in attitudes to the BBC, or to the licence fee as a funding mechanism. Whilst some participants continued to insist that the licence fee represents good value for money, more licence fee payers than previously questioned its value, particularly when judged in the context of all the other subscriptions they were now paying.

If you work out the cost per hour of the BBC, it's a lot less than Sky or any of these other subscription services and I think anyone who complains about the cost of the BBC should really examine what they're paying for otherwise.

Male, 77, Retired, Warwick

There's not generally a lot on the BBC that I do watch... I don't have an aerial. Everything that I watch is through Sky, and I pay enough money for Sky. I sort of see it [licence fee] as a tax and you have to pay it. I wouldn't say I begrudgingly pay it but, as a family, I don't think we're getting any money's worth.

Male, 47, Engineer, Rural Derbyshire

It's not that much when you split it three ways [between him and his house-mates], but... I don't really watch BBC... When you have to pay for a lot of other things as well it's another extra cost, which is frustrating.

Male, 22, Betting Odds Trader, Leeds

Although some participants claimed that they have a preference for programmes made or set in the UK, only a handful (primarily those in the Nations) backed up this claim with evidence that programme provenance had actually influenced their viewing choices.

There's a lot on Scotland... Landward... Sacred Islands with Ben Fogle... and I love watching him because these are all islands I've been to.

Female, 77, Retired, Edinburgh

Sometimes you see the odd film. Sometimes there are dramas... Anything like that we would try and watch, just to see.

Male, 60, Alarm Fitter, Lisburn NI

I've watched The Sons of Anarchy and that's American; The Sopranos is American. So it doesn't matter too much, really.

Male, 32, Labourer, Colchester

Maybe I should support things that are made in the UK. Morally I probably should, but I've not really thought about it before.

Female, 28, Solicitor, Edinburgh

The coverage of major sporting events this year – particularly Euro 2020 but also the Olympics, Paralympics and US Open tennis – was considered a highlight of the viewing year by many participants. The coverage of these events on the BBC, ITV and Channel 4 was generally well-received.

The Olympics, I thought, were really well covered by the BBC.

Male, 42, Web Officer, Cardiff

The Olympics, the Paralympics. I just sat and watched all day and everything.

Female, 77, Retired, Edinburgh

I like football. So the Euros were right up my street. Absolutely fantastic. Loved it. Loved the atmosphere.

Female, 55, Housing Officer, Coventry

4.5 YouTube continues to play a prominent role in many participants' viewing repertoire

The majority of the sample claimed to consume a lot of content on YouTube. This is broadly in line with previous recent waves, although a broader variety of different types of content were mentioned this year, including news, sport and documentaries as well as the more obvious 'how-to' videos, vlogs and viral content.

I look at YouTube probably about five days a week... The last television programme that I saw was probably weeks ago, to be honest with you.

Male, 67, Semi-retired, Pinner

This is how my evening goes... I look at all the things my friends are up to on Facebook. Then I go on YouTube and catch up on everything. I spend a lot of time on there. You can get whole shows on there, like Love After Lockup. I do have the TV on in the background, but it's mainly YouTube.

Female, 60, Unemployed, London

The videos I watch are mainly from independent videographers producing sports videos about various endurance athletes doing their thing. YouTube is good for that – probably better than Netflix, Amazon etc. Even though their product is slightly more polished, the YouTube stuff is really good and there's loads of it.

Male, 42, Web Officer, Cardiff

Some YouTube influencers (e.g. Joe Rogan, Tucker Carlson, Akala) appear to be establishing themselves as prominent media personalities in their own right, independent of any traditional media platform. Often these individuals have a presence across several platforms (e.g. YouTube and Instagram), allowing them multiple touchpoints with their audience. Several participants cited individuals they follow on YouTube or social media as trusted sources of information, particularly about politics (see section 7.2, below).

4.6 In-home radio listening via smart speakers and phone apps appears to be growing at the expense of traditional radio sets

Growth in the ownership and use of smart speakers (see section 2.1, above), and the use of radio apps, led to an increase in claimed radio listening at home for some participants. Radio stations were sometimes seen as *competing* with music streaming services like Spotify, Apple Music and Amazon Prime Music or – in other cases – as a source of speech content to *complement* the music from such services.

I find myself using the phone more for music now... even at work. I still listen to Capital in the car, but I've started listening to Heart Dance. At night when I go in the shower I've got a waterproof speaker and I take that in the shower and have chill-out time listening to music.

Male, 47, Engineer, Rural Derbyshire

We've got an Alexa Dot. I'll put the music on in the background. Because I've got an Amazon Music account I'll play the music rather than have the radio on. We do put Radio 2 on from time to time, which does [daughter's] head in and she changes it to Capital. That's like a running thing in our house. Whoever can shout the loudest will get Alexa.

Female, 44, Fundraising Manager, Cardiff

Although a few (older) loyal listeners continue to behave much as before, the use of radio sets is declining elsewhere in the sample.

No, never. We don't even have one [radio set] in the house. We used to have one here [at work] but I don't know where that is. It's on your phone, it's there, it's so much easier.

Male, 47, Engineer, Rural Derbyshire

4.7 As participants have spent less time at home post-lockdown, the previous growth in listening to podcasts has stalled

The growth in interest in podcasts we witnessed in recent previous waves (and especially last year) appears to have stalled. As participants' lives had got busier again there was less opportunity to listen. There were no new podcast listeners in the sample, and one or two participants who had dabbled with listening to podcasts previously had not gone on to become regular listeners.

I still haven't got into podcasts... When the Six Nations or the Lions tours are going on I now and again listen to the Scrum V podcast, but I've not got into the habit of subscribing... I've got so many good tips for podcasts that I'm starting to feel that I'm really falling behind.

Male, 42, Web Officer, Cardiff

I don't [listen to podcasts]. I would love to. It's more a case of time. So many people have given me things to listen to recently but I just don't have the kind of life to be able to do that.

Female, 44, PA, Woking

Nevertheless, a small core of listeners reported that they do still listen regularly to podcasts. Typically, this was via a mobile device, often while walking.

I still listen to podcasts, mainly sports ones. Jamie Carragher, he does one... Sometimes I listen to Joe Rogan, it depends who's on it. We now have a podcast at work... and I'm one of the people who does that, I enjoy that.

Male, 22, Betting Odds Trader, Leeds

I listen to Today in Focus by The Guardian most mornings because it's only 30 minutes and it's a good way to wake up and get thinking before you start work. I also listen to All Killer No Filler... it's quite a funny serial killer podcast.

Female, 28, Solicitor, Edinburgh

60% music, 30% podcasts, but only when I've had enough of listening to music and I'm doing a long walk. There's only so much music you can listen to, whereas with the podcasts, if it's something you're interested in, you don't have to listen to it intently.

Male, 32, Labourer, Colchester

5. SOCIAL MEDIA, GAMING AND HARMFUL CONTENT

Social media has been an important facet of most participants' lives for many years and, since the widespread use of social media and messaging apps on smartphones, easily accessible in almost all circumstances. The inclusion of chat and party functions within gaming platforms has added a social media-like dimension to gaming as well. During the pandemic, when it wasn't always possible to meet people face-to-face, these methods of staying in touch with friends and family took on an additional level of importance, although this also led to concerns about the amount of time devoted to them, and the risk of being exposed to harmful content.

5.1 Social media remains integral to most participants' lives, although the way they use it is evolving

Despite participants expressing concern about the amount of time they spend on social media, and making attempts to reduce this (see section 2.3 above) there were numerous examples in this wave of social media being intrinsically involved in participants' major life events (e.g. organising a wedding, setting up a business, moving into a new area).

I probably did use Instagram quite a lot actually for planning the wedding, for things like flowers... I got them off Instagram and sent the pictures of what I liked to my florist. Same with the dress. We actually put a Facebook album up for a while as well... We dithered about it because you don't want to be those people that just post their wedding absolutely everywhere. But we decided that actually it is quite a nice thing and friends want to see it, I think... Of course you're cautious that your wedding looks good when you put it out there.

Female, 33, Doctor, London

In terms of the specific platforms used, there was further decline in the perceived appeal and claimed use of Facebook (particularly among those under the age of 30), although the majority still had an active Facebook account, and it continues to be used by more participants than any other platform (ahead of Instagram and Twitter).

I use Snapchat every day, Instagram every day, TikTok every day. Facebook... I check on it every day, but I don't use it every day.

Male, 17, Student, Manchester

I've been off Facebook for a while now. I've got no desire to go on it whatsoever.

Female, 28, Solicitor, Edinburgh

Since the previous wave there had been more widespread adoption of TikTok (and accessing of TikTok-style content through other platforms such as YouTube and Instagram Reels). This type of short form video content appealed to users for its instant gratification, and several commented that the TikTok algorithm is particularly effective at serving up content to their taste.

However, the appeal and use of this type of content varied widely across the sample. Users were exclusively younger participants (under 30).

I was talking to my dad the other day and my dad asked, "Do you speak to your brother?" And I said "No, but he sends me a TikTok every day". We don't have a lot of time to talk. He works and I'm at uni, but it's nice that we sort of think about each other to send a TikTok.

Female, 21, Student, Loughborough

You know, as soon as you go on it, you're getting something that's going to distract you. It just fills time, and a lot of it I find quite funny... The videos that come up on it... they make me laugh.

Female, 28, Solicitor, Edinburgh

Reddit was mentioned for the first time by a few (young male) participants as a useful source of information they might not be able to access elsewhere.

I've got a bit more into Reddit recently as well... One of my pet peeves is when you read a news article, often on the BBC or wherever, they'll tell you about some awful thing that's happened. There's definitely a video of it, but they don't put the video in. But then if you go on to Reddit, someone's always, always put the video up.

Male, 25, Tutor, London

If I have a stupid question I just put it on Reddit because loads of people are bound to have the same stupid question.

Male, 17, Student, Manchester

5.2 WhatsApp has become more important to participants since the pandemic

Over the past few years, WhatsApp seems to have become the *de facto* standard for messaging among our participants. Since the pandemic it is also being more widely used for video and voice calling. WhatsApp (and, to a lesser extent, other apps such as Facebook Messenger) were credited with having played an important role in the past year in mitigating the problems of isolation and loneliness.

During lockdown we were unable to go and meet people, so everything went online... WhatsApp, Facebook video calls, things like that. I have family in Africa, [but] for two years now we have not been able to travel. My Mum likes to be able to see her grandchildren so every weekend we do a video call, everyone together.

Male, 40, NHS Support Worker, Liverpool

The main one I use to communicate with friends is WhatsApp. We also have a class WhatsApp for each of the children. That means we can remind each other of things that are going on, where you need to be, if there's a meeting. It's an amazing tool. And I find the video call function on it too is brilliant.

Female, 44, PA, Woking

I'm on WhatsApp now. My daughters and I have a kitchen group if we're making a recipe together. My neighbour is always sending me funny pictures of cats and things like that.

Female, 77, Retired, Edinburgh

Groups have become an essential organisational tool both for families and workplaces. Most participants now belong to multiple 'micro-networks' (including sub-segments of family groups), designed around specific functions.

This year I have never had so many WhatsApp chats. I've got one for cheerleading, one for coursework groups, one for my dissertation. We even had one for renting this house. It's not chats on Facebook anymore, it's chats on WhatsApp.

Female, 21, Student, Loughborough

WhatsApp is mainly for family... If my mum wants to message me, she'll do it on there. We've got, like, five different family groups on there. If my sister goes off to uni we'll make a group without her because if [the message is] something like "Come down to eat" we don't want to notify her if she's away at uni.

Male, 17, Student, Manchester

5.3 Gaming is an important social activity for the young men in the sample

Our sample is strongly segmented in terms of gaming, either on consoles or mobile devices. The majority are non-gamers. A few play simple games via apps on their smartphones, usually as time-fillers.

I sort of go through fads of playing different games. And at the moment... it's Solitaire. I don't know why.

Male, 47, Engineer, Rural Derbyshire

It's basically when there are small amounts of time... to keep yourself occupied. It's not long enough for me to read a chapter in a book, but it's more time than doing nothing.

Female, 44, Fundraising Manager, Cardiff

However, for all the young (under 40), male participants in the sample (and the sons of some parents), gaming plays an important role in their life. They primarily described themselves playing console-based games, usually as a social activity with friends (either online or in person).

I have a PlayStation 4. I like playing FIFA. Luckily I have someone who likes football the way I do – that's my brother's son. Whenever he comes round, we play that.

Male, 40, NHS Support Worker, Liverpool

I pay £6.99 a month for PlayStation Plus and I play Call of Duty on it. I find it really fun but I'm not very good at it.

Male, 32, Labourer, Colchester

It is a way of socializing with my friends. We will message saying 'Do you want to come online?' and then we'll just play together and stuff.

Male, 17, Student, Manchester

At other times gaming was described as taking place in parallel to independent social interaction with friends, either within the 'party' function of the platform itself, or a complementary online platform such as Discord.

Nights like tonight, for example, I probably won't go and play on it. A lot of my friends are online, so I'll just go and have a chat, catch up, see how they're all doing, probably stay in the party as well when I'm watching the Liverpool game later, things like that.

Male, 22, Betting Odds Trader, Leeds

There was little evidence of them interacting with strangers while gaming. In part, this was as a result of experiences of anti-social behaviour by other users (see section 5.4 below).

5.4 Participants are aware of harmful content, but rarely impacted directly by it

Participants had little experience of being targeted or offended personally by harmful or offensive online content in the past year. This is broadly in keeping with previous waves, where such experiences were the exception, rather than the norm.

Nothing that comes up in my recommendations offends me. I'm not really one of them, as they're called, 'snowflakes'!

Male, 32, Labourer, Colchester

I very seldom see something and think 'Oh God, that is repulsive and it offends me', but I see something and I'm like, 'Ooh yeah, you know, that could annoy somebody'.

Male, 25, Tutor, London

Nevertheless, most claimed to have seen (either first-hand on social media – particularly Twitter – or through reports on other platforms) abuse directed at people in the public eye, especially politicians and footballers – reflecting a so-called "toxic" culture which participants have increasingly started to associate with these two spheres.

The horrifying bigotry of some of the comments is almost terrifying. It's spilling over into personal reactions and face-to-face reactions.

Male, 77, Retired, Warwick

I think people pretty quickly become kind of deindividuated, where they forget that they are that person. And that's when you'll see like Saka and Rashford getting that grim racist abuse after the Euros.

Male, 22, Betting Odds Trader, Leeds

However, there were also occasional positive comments praising the response of the majority of social media users to (for example) the abuse of England footballers after losing the final of Euro 2020.

The vast majority of what I saw was supportive and completely condemning the racial abuse. So I think there is that horrible side to social media, but I think most people in the world are good, and there is a really good side to it as well.

Female, 33, Doctor, London

Several participants felt strongly that more should be done to pursue the perpetrators of such abuse, and many participants commented that they felt the social media platforms could do more to prevent or remove harmful content.

If it was the US President getting these messages, these people would be tracked down. MPs... get an avalanche of hate mail and nothing appears to be done. There just needs to be a few people brought out and flogged for the rest of them to... see what happens if you do this. And I think that's what is required to be honest with you.

Male, 67, Semi-retired, Pinner

Gamers who play online described a competitive culture where baiting opponents can be part and parcel of the experience. However, there were examples where this had strayed into what they perceived as anti-social behaviour, especially in and around football games.

In terms of interacting with the other people we play... I don't know if you've ever heard of 'Tea-bagging'! It's when you get your character to rapidly squat and stand up, and it's sort of a sign of disrespect. So usually when we're thrashing somebody, we do that.

Male, 25, Tutor, London

You'll play some people [on FIFA] who will have a racist name. We play teams who name their team after serial killers. A lot of them will be sexist, whatever. I think the main contact now is probably just reporting them. If you do beat them, you'll probably receive a message abusing you just for beating them on a game, which you'd think would have changed by now but probably never will. I just turn my messages off. I've never experienced it on Formula 1. If anything, in fact, on Formula 1 you actually get messages like "Well done" and "Good race".

Male, 22, Betting Odds Trader, Leeds

5.5 Attitudes to internet regulation were broadly consistent across the sample

There was very little awareness, even when prompted, of the forthcoming Online Safety Bill. When prompted for their opinion, the majority of participants expressed the view that the priority of such a bill should be the protection of children.

Bullying and harassment on social media is such a big thing, and I have personal experience of that. People who are just starting secondary school can get a lot of abuse, and you're very impressionable at that age. I'm a mental health nurse now and I think it's a really big problem. I know they probably can't stop it completely, but... I think it would be good for them to focus on that.

Female, 21, Nurse, Belfast

Many blamed the social media companies for not doing more to enforce age limits or block bots and trolls. (The fieldwork coincided with the Facebook whistleblower news story.) Some found it difficult to believe that relevant filtering technology does not exist.

I think that the companies do have a responsibility to police that sort of thing and – to an extent – they do. But I'm not convinced that they're doing it enough. It's difficult because, when it comes to something like the Sarah Everard case, everyone's entitled to say what they think. But, when they're so obviously coming from fake accounts which have just been set up to write inflammatory comments about things, shouldn't we be policing that a bit better? And I'm sure they have the power to [do so] because these companies are so rich, and so powerful.

Female, 33, Doctor, London

It must be possible because when I'm gambling and there's a chat panel down the side... if you swear or anything like that it won't come out, it blocks it. It must be possible to have keywords that, when people are trying to be keyboard warriors, it won't be possible to say it.

Female, 60, Unemployed, London

The most common practical suggestion was introducing a higher age limit for social media accounts (or stricter enforcement of the current limits). Forcing account users to have a verified public identity was also a popular idea, although a few participants voiced mixed feelings about the implications of this.

I don't know if it would ever be possible to do this but I do think that you have to ban smartphones and social media for people under the age of 16. If tomorrow you were to become famous but someone had access to your thoughts and feelings when you were 13, they could probably cancel you quite quickly. A child is too young to understand that what they say now, what they post now, could be brought up to try and ruin their livelihood thirty years down the line.

Male, 25, Tutor, London

If you had to have an ID to set up an account – to prove you are who you say you are – people might be deterred from setting up accounts purely to bully people.

Female, 21, Nurse, Belfast

I don't see why you would want to be anonymous online. If you've got nothing to hide then you can identify yourself... But then there are one or two accounts, like The Secret Barrister, who talks about flaws in the justice system.

Female, 28, Solicitor, Edinburgh

I understand the need to protect people, especially children... But if the government did restrict [the internet], to me it would just take the fun out of it... I can imagine people saying "What's the point now?", and talking about freedom of speech.

Male, 17, Student, Manchester

6. PRIVACY, PERSONAL DATA AND SECURITY

As media use has evolved, and participants' understanding of privacy issues grown, the nature of their concerns has shifted. In the early years of the study they tended to be worried about their personal data being hacked or private details of their personal lives leaking into the public domain. Over time, they have grown more savvy about managing their privacy settings effectively on social media, and developed strategies to minimise the amount of personal data they share overtly with social media platforms and other websites.

Some are concerned about how their behaviour might be tracked by technology companies and their data used (for example) to serve up unwanted advertising, but user interventions such as reading Terms and Conditions and managing cookie settings are labour-intensive, and so they tend not to act on these.

Their greatest concern at the moment is the proliferation of scam emails, texts and phone calls they receive, especially as these become more sophisticated and (apparently) targeted in nature.

6.1 Attitudes to privacy and personal data have not changed significantly this year

There were no major changes this year in terms of participants' attitudes to privacy and personal data.

As in previous recent waves most participants described themselves taking some active steps to protect their privacy (e.g. only giving away the bare minimum of personal data required to register for a site or service, using multiple email addresses for different purposes), but being more *laissez-faire* in other situations where their personal data might be harvested for commercial purposes (e.g. cookie notices, website terms and conditions).

I have got a Yahoo address, which I use for my junk stuff, and then I've got a Gmail address, which I use for things that I genuinely need to... like banks, any shopping sites I use regularly. I keep that address for that.

Female, 44, PA, Woking

Most were resigned to the idea that they will be targeted by contextual advertising whether they like it or not. Despite having misgivings about this, they generally viewed it as an unavoidable trade-off if you choose to use social media platforms, etc.

If I search for a black jumper on Instagram, I'll always see black jumper advertisements and it does annoy me a bit. I understand I've accepted the terms and conditions but... when it comes to social media, it's just like you can't stop it. You either use the app or you don't.

Male, 17, Student, Manchester

I've noticed more and more now when I'm using websites that I'm getting cookies come up, and I have started to click into them 'cause I'm thinking, "God, they're watching everything I'm doing", and I don't really want them to give me an advert based on what I'm doing. If I'm just doing a one-off thing or I don't want my husband... to know what I'm doing.

Female, 44, PA, Woking

A few participants claimed that they were now more reticent than before about posting publicly on social media – either making their accounts private or not posting at all. This was sometimes driven by concerns about their online reputation or career prospects but in other cases by specific worries about being targeted personally.

There are a lot of troubled people on there [Facebook]... I didn't like it. I was getting hassled by blokes, or every now and then an ex-boyfriend would pop up and I just thought "What's the point? I don't even really enjoy it". The only real reason I stayed on there was to speak to my family on the Messenger.

Female, 48, Stay-at-home Mum, Chelmsford

A couple of times, I've gone to Facebook and wanted to post something about something that's happened. And then I thought no, because people will trace me back... We had an incident with Halloween: there were some kids who came round, teenagers who stole from all the houses. And I wanted to put something saying it's really sad that that's going to happen. But I thought these teenagers could come for me. If they wanted to, they could find me out. So, yeah, things like that really scare me now.

Female, 44, PA, Woking

6.2 Security concerns about scam emails, texts and calls have become significantly greater this year

Almost all participants were unhappy about the large number of scam emails, texts or calls they have received in the past year. There was a marked increase in anxiety compared to previous waves, and this most likely reflects an increase both in the volume and sophistication of such threats.

I've had so many scams... In fact, the landline is nicknamed 'The Scam Phone'

Female, 60, Unemployed, London

Many of the scams were considered indiscriminate and relatively easy to spot. However, others were more sophisticated and appeared to be targeted in their approach (and therefore credible).

In the last few days, I've had some scams on virus software that is due to expire.

Male, 67, Semi-retired, Pinner

You know, the Census survey where you have to fill in the form... I got a message on my phone saying that I'd filled it in incorrectly and that I was going to have to give out some information that wasn't in there.

Female, 60, Unemployed, London

In particular, fake delivery messages purporting to be from Royal Mail, DPD etc. (in a period where online shopping has increased a lot) had caught out several participants, and others had only narrowly avoided the same fate.

It was the first time that I'd seen this thing about sending your £1.50 or something to release the parcel. And I was on the verge of being convinced by it.

Male, 77, Retired, Warwick

For a split second I thought "Oh gosh, you know what? It's a pound." But then something stopped me... I put in DPD. And to be fair to DPD, when I went onto their website, in block red capital letters all across they were telling people about the scam.

Female, 55, Housing Officer, Coventry

I don't know how they knew, these scammers, that it was coming that day. I've clicked on it and I was, like "What?" and I was running up and down the road. And I saw a DHL van and I knocked on the van. "Oh no, I've missed your parcel." He's like "No, I'm not even on the run here mate. I've just stopped here for coffee". I maybe was a bit naive.

Male, 32, Labourer, Colchester

A few participants, who either had elderly parents or (in one case) worked with the elderly, had particular concerns about vulnerable older people being targeted.

I have clicked into something, but it hasn't luckily had any repercussions. It's quite worrying. And also for my parents, it worries me even more.

Female, 44, PA, Woking

The phone calls to the elderly saying that there was a warrant out for their arrest over pensions, etc. Very, very distressing... At one time, if they were being done in this country, you could go through and you could block the calls. But when they're coming from abroad, you can't.

Female, 55, Housing Officer, Coventry

Participants were not aware of any reliable reference source for checking whether or not a message might be a scam. Often they claimed to rely on being alerted to specific scams via social media. In some cases, they sought a second opinion from a friend or family member to help them make the right choice about whether to respond to a message.

A lot of the time emails like that just go into your junk so, unless you're going through your junk, you don't really get to see them... Texts are more of a problem... There are times when I would show them to [boyfriend] because he's probably a bit more clued up than me. It's easy to be caught out.

Female, 21, Nurse, Belfast

I hear bits and pieces from friends, you see it posted on social media. A friend of ours is a policeman. If there's anything he knows about, he'll tell us. I constantly have texts from my mum... checking whether [delivery notification] is legitimate... I've trained my in-laws and my mum to be really suspicious, especially if they're not expecting something.

Female, 44, Fundraising Manager, Cardiff

7. NEWS

When we interviewed a subset of participants early in lockdown (in April 2020) most were consuming more news than usual, but by the time of Wave 16 (October 2020) the picture was more mixed. This year behaviour and attitudes to news largely reflected longer term trends towards fragmentation and personalisation, with individual participants accessing a diverse range of news sources, and large differences in how much trust they claimed to have in the mainstream news media (particularly the BBC).

7.1 Overall interest and trust in news has declined since last year, but local and regional news sources have become more important

Most participants were following the major national news media less closely than they were at the time of Wave 16 (October 2020). This was often because of being less interested in following the pandemic (see section 1.4, above).

Some participants had started to explore a more diverse range of news sources, including some from overseas. This marks a return to a long-term trend we had seen before the pandemic.

I follow a blog called Intel News, which is more intelligence-driven news. It's usually quite interesting because you get a lot of news-adjacent stories which kind of slip under the radar a bit.

Male, 25, Tutor, London

I've watched Sky Australia [on YouTube] a couple of times. They seem a lot more truthful and forthcoming than the English media for some reason.

Male, 32, Labourer, Colchester

The one I normally watch for news is Channel TV... It gives you everything that is happening in Africa... It's not like fake news or something, it's right news... And I get that from YouTube.

Male, 40, NHS Support Worker, Liverpool

The introduction of different Covid rules/tiers by location in late 2020/early 2021 had led to many participants using more local news and information sources than usual in the past year.

I'll use my iPad. I'll go on to Sky News. I'll do the local Coventry Telegraph online.

Female, 55, Housing Officer, Coventry

Manchester Evening News... it's quite local. So that's where I got most of my news from. And then there's an Instagram page for our area... [The author] is quite well known and he always updates it.

Male, 17, Student, Manchester

Some participants were critical of the national news media for what they considered to be 'scaremongering', sometimes in relation to the pandemic but most often in the context of the petrol shortages of summer 2021. This was symptomatic of a small but significant loss of trust for many participants.

One day the media would be saying "Boris is so awful, locking us down", and then the next day they'd be saying "Look at all these stupid people out in Hyde Park, not following the rules". It was just clickbait and headline grabbing.

Female, 33, Doctor, London

I mean, it's happening again with the petrol crisis, where they're drumming up a lot of anxiety in the public and causing a lot of problems where there aren't any. I just thought that's dreadful, the way they've done that, and then caused this huge panic so that the army ended up getting involved. And now look at it, it's just back to normal.

Female, 44, PA, Woking

They say "Don't panic buy!" and then everyone panic buys, and we're all struggling to get petrol. I'm trying to move house. I've got stuff round my mum's house to bring round here.... We can't even do it because all the petrol stations are backed up and no one's got petrol. It wouldn't have been a problem if the media wouldn't have said it.

Male, 32, Labourer, Colchester

7.2 Four clear types of news consumer can be identified, with distinct attitudes and behaviours

Interest in, and attitudes towards, news vary widely across the sample. We were able to define four clear types of news consumer, with distinct attitudes and behaviours: News Hungry (consuming news from multiple sources and platforms), News Sceptics (suspicious of the mainstream media), News Neutral (no strong feelings about news) and News Avoiders (find news boring or distressing). This is an update on qualitative segmentation analysis originally conducted in 2018, reflecting changes in attitude as a result (in part) of the pandemic.

- News Hungry individuals were now more likely to be supportive in principle of the idea of the BBC as an independent and impartial news source, and sympathetic about the challenges it faces.
- News Sceptics were more entrenched in their attitudes towards the mainstream media (especially the BBC), and more likely to express a belief that some kind of conspiracy amongst the establishment aims to silence (certain) independent voices.
- News Avoiders often cited being upset or bored by coverage of the pandemic as a specific reason for their avoidance of news content, rather than a broader lack of interest (as they did previously).

Most participants fall clearly into one of these four typologies, although a few demonstrate characteristics of more than one.

News Hungry

- Interested in news and consuming it from multiple sources and platforms
- Conscious of the source of news
- Impartiality is important to them
- Generally supportive of the BBC in principle (though often critical in practice)
- Don't tend to watch TV news bulletins because they have already seen the information via other sources

I think you're always going to have a right-wing and a left-wing media. That's why I like The Week so much because it gives both points of view. If you're just reading the Guardian or the Times, your views are never challenged and it's just an echo chamber...of your own views being bounced back at you and getting stronger and stronger.

Female, 33, Doctor, London

You know, the BBC, OK there's a hell of a lot that needs sorting out with it, but at least it's got that kind of remit to serve the public, and do it as neutrally and dependably as possible.

Male, 42, Web Officer, Cardiff

I think it's very tricky [for the BBC] to be an independent organisation which simultaneously is funded by the taxpayer and whose budget, I assume, is handled by the Minister for Digital Communications or whoever.

Male, 25, Tutor, London

News Sceptics

- Suspicious of the mainstream media and the BBC in particular
- Mainly or (in some cases) only consuming news through secondary sources such as online influencers or friends and family
- More likely to be open to conspiracy theories
- Feel disenfranchised and believe that people who represent their views have been silenced by the mainstream
- Don't tend watch TV news bulletins because they don't trust them

There's about two people that I get my news from. One is called Lowkey... And one is called Akala. Both are very intelligent and they have never lied about anything. If they say something, they'll use articles and reasonable sources. So I think 90% of my news comes from them.

Male, 17, Student, Manchester

Tucker Carlson, he's a news reporter. That's where we get a lot of our information from. He is easy to find and he does speak the truth. And it's not going to be long, I don't think, before something happens to him because he says "You know how it is".

Female, 48, Stay-at-home Mum, Chelmsford

The English media... I think they're just so left-wing nowadays. I'm not exactly right-wing, I'm not left-wing. I just like being truthful. If you're just a normal working class British man you won't get seen. Do you know what I mean? And I think everyone's getting the hump with it, you know?

Male, 32, Labourer, Colchester

News Neutral

- No strong feelings about news
- Primarily interested in news that's directly relevant to them (e.g. local or Covid-related)
- Tend to stick to one or two main sources
- The most likely group to watch TV news bulletins

My first port of call for, if you like, world news... I go on the Sun app because it's there, it's easy to open... If it's big world news that is too much for the Sun, I'll go on Sky News and look on their app.

Male, 47, Engineer, Rural Derbyshire

BBC News on the TV, Newsround... If there's something going on, I will Google the news sites and just put the title in and then choose one of the best articles... I wouldn't go to the Sun or the Express as such. I would more go for the Independent or the Guardian or one of those.

Female, 44, PA, Woking

News Avoiders

- Fed up with news coverage, especially around the pandemic
- Tend to find bad news distressing
- Don't watch news bulletins because they're not really interested

I never really like the news. I never really watch much of it... The wife will say "Did you hear?" and I'll go "What?". She says "What, you never heard?" and I'll say "No, I don't watch news. I rely on you for the news!"

Male, 60, Alarm Fitter, Lisburn NI

I went through a period of being quite fed up with listening to the news because it [the pandemic] seemed to me to be all you were hearing about.

Female, 21, Nurse, Belfast

News is only there to let you know the bad things in life and we've enough of that going in our own wee quarter.

Male, 60, Alarm Fitter, Lisburn NI

ANNEX 1

Summary of participant profiles – Wave 17

Sex	Age	Job	Location	Years in study
Male	17	Student	Manchester	1
Female	21	Nurse	Belfast	3
Female	21	Student	Loughborough	8
Male	22	Betting Odds Trader	Leeds	9
Male	25	Tutor	London	8
Female	28	Solicitor	Edinburgh	14
Male	32	Labourer	Colchester	16
Female	33	Doctor	London	16
Male	40	NHS Support Worker	Liverpool	1
Male	42	Web officer	Cardiff	16
Female	44	PA	Woking	1
Female	44	Fundraising manager	Cardiff	16
Male	47	Engineer	Rural Derbyshire	17
Female	48	Stay-at-home Mum	Chelmsford	16
Female	55	Housing officer	Coventry	17
Male	60	Alarm Fitter	Lisburn, NI	14
Female	60	Unemployed	London	16
Male	67	Semi-retired	Pinner	16
Female	77	Retired	Edinburgh	14
Male	77	Retired	Warwick	5

ANNEX 2

Discussion guide

General media usage

What, if anything, has changed in your household since last time we spoke and what impact has that had on you?

What new media technology have you acquired in the last 12 months? What were the reasons for getting this new 'stuff'? Were they upgrades/replacement, or new items?

What factors influenced your choice of product/service? [PROBE ON THE ROLE OF INTRINSIC (E.G. FEATURES, PRICE) VS EXTRINSIC FACTORS (COVID/LOCKDOWN, REVIEWS, PESTER POWER)]

Have you changed your phone or phone package in the past year? How and why (or why not)? [PROBE IN PARTICULAR ON CHOICE OF HANDSET – MODEL, NEW VS SECOND-HAND, ETC. – AND ANY SWITCHING TO/FROM SIM-ONLY PACKAGES]

Thinking about the different electronic media you have access to, including TV, radio, the internet and gaming, which media are you using more than last year, and which are you using less? Why is this? [PROBE ON INCREASED/SOLE USE OF SMARTPHONE FOR GOING ONLINE AND – WHERE RELEVANT – ON SMART SPEAKERS. Are they still largely for occasional/fun tasks or have they become intrinsic to daily life?]

Covid-19: overview

How has your day-to-day life been affected by the Coronavirus pandemic since we last spoke to you? [PROBE ON E.G. WORKING FROM HOME, FURLOUGH, EFFECTS ON INCOME/CAREER PROSPECTS]

To what extent do you feel that things have returned to normality for you? What does the "new normal" look like for you? Has the pandemic led to any permanent changes to the way you live your life?

Which media have you been using to keep yourself informed about the pandemic and any changes in rules or official advice? Has this changed since last year? [PROBE ON TV, RADIO, ONLINE SOURCES, SOCIAL MEDIA, NEWSPAPERS]

How conscious are you of the source of the information you're seeing (e.g. directly from NHS or the Government, mainstream news sources like the BBC, Mail, Guardian, other news sources, opinions from people you do or don't know)? Do you trust some more than others?

Has your experience of media coverage of the pandemic changed your opinion about the media in general, or any specific news sources in particular?

Have you noticed labels and links on websites and social media directing you to official sources such as the NHS? How helpful are these, and how often (if ever) have you followed them?

Have you come across any misleading information or conspiracy theories relating to Covid-19 – for example around vaccines? [PROBE FOR DETAILS] How did you decide whether or not you could trust this information?

Has the ongoing pandemic influenced your media use at all (e.g. watching more TV/box sets/etc.)? How does this compare to last year, and to before the pandemic?

How have you been using technology to keep in touch with friends and family? [PROBE ON ROLE OF SKYPE/FACETIME/ZOOM ETC. AND OF WHATSAPP/MESSENGER GROUPS DURING LOCKDOWN AND BEYOND] How has this evolved over the past year?

Do you use these for one-to-one conversations, for group chats, or a mix of both? [PROBE FOR DETAILS]

Have you helped other family members or friends get online or taught them how to use a new service as a result of the pandemic?

Have they continued to use their new skills or have they reverted to their pre-lockdown behaviour as the restrictions have eased?

Have they grown more confident in using technology as a result of the pandemic? [PROBE FOR DETAILS]

Customer Experience

AUDIT: WHO PROVIDES THEIR TV/LANDLINE/BROADBAND/MOBILE – INCLUDING BUNDLES?

Have you had any problems with your TV/phone/broadband/mobile service in the past year (either in terms of technical issues – including internet speed – or customer service)? [PROBE FOR DETAILS] What impact did not having access to [SERVICE] have on you?

Have your household needs in terms of broadband usage changed in the last year (e.g. as a result of more home working/schooling/use of streaming services)?

(If so) Did this prompt you to consider changing supplier or changing the package you have with your current supplier?

Have you switched TV, telephone, broadband or mobile provider in the past year? If so...

What prompted you to switch? How did you decide on which provider to go with?

What was the experience of switching like?

Have you renewed a TV, telephone, broadband or mobile contract with your current provider in the past year? If so...

Did you consider switching? Why (not)?

Television: Overview

What have been your personal viewing highlights over the past year? Which programmes have you most enjoyed, or found most interesting? [PROBE FOR DETAILS]

How do you watch television and streaming services now? What changes, if any, have you made to your TV viewing over the past 12 months, and why? [PROBE ON CONSUMPTION OF LINEAR VS ON-DEMAND TV, USE OF STREAMING SERVICES SUCH AS IPLAYER, ITV HUB, NETFLIX AND AMAZON PRIME, AND ROLE OF DIFFERENT DEVICES, ESPECIALLY WATCHING ON SMARTPHONES AND TABLETS.]

How much of your viewing is on your own vs with other people, and has this balance changed at all as a result of lifestyle changes forced by the pandemic? Are there certain specific programmes (or types of programme) you tend to watch with others, or particular times of the week (e.g. Saturday night) when you'll watch together?

Of all the different television channels and streaming services you now have access to, which would you consider to be your "go-to", or first choice, channel or service?

Does this vary depending on the type of programme you're watching, or who you're watching with? [PROBE FOR DETAILS]

Is it easy to find good programmes to watch?

Has your opinion of TV or streaming services changed over the past 12 months? How and why? [PROBE: ARE THEY MORE/LESS IMPORTANT? ARE THEY USING THEM FOR DIFFERENT REASONS?]

There have been many high profile sporting events this year (e.g. Olympics and Paralympics, Euro 2020, US Open tennis). [IF INTERESTED] How have you watched these? What did you think of the coverage?

Are you more interested in programmes that are made or set in the UK than those made or set in the US? [WHERE RELEVANT] What about those made or set in Scotland/Wales/Northern Ireland? Do you make any special effort to seek these out?

Would you consider getting rid of your TV set? Has your view on this changed in the past year?

Have you considered no longer having a TV licence? [PROBE FOR DETAILS] Has your view on this changed in the past year?

On-demand (OTT) or streaming services

Do you currently have a subscription to any streaming video services? Netflix, Amazon Prime Video, NOW TV, Disney+ and Apple TV+ are the main ones, but there are lots of others.

Have you got any new ones in the past year? What prompted this (e.g. a specific series)?

Are these household subscriptions (for the family) or personal ones?

Have you considered cancelling any of your services (to save money or for other reasons)? [PROBE FOR DETAILS]

How do you tend to watch these services (laptop/mobile/tablet/smart TV/etc.)?

Has the amount of time you spend watching services like Netflix, Amazon Prime Video, NOW TV, Disney+ and Apple TV+ – or the way in which you watch them – changed?

What are you watching on these services? [PROBE FOR VIEWING OF ORIGINAL OTT CONTENT SUCH AS BRIDGERTON, TED LASSO, THE BOYS, THE CROWN, THE MANDALOREAN ETC. vs BBC/ITV ARCHIVE CONTENT SUCH AS PEAKY BLINDERS, CALL THE MIDWIFE, DOWNTON ABBEY]

What other TV viewing (if any) has been replaced by these services?

Have you purchased any on-demand content (such as pay-per-view movies or sports passes) on top of any subscriptions you may have? [PROBE FOR DETAILS]

Has the way that you watch BBC, ITV, etc. changed as a result of using services like Netflix? For example, are you now more likely to watch programmes on those channels on demand, as a box set or on a device other than a TV set? [PROBE FOR EXAMPLES/DETAILS]

How do you find programmes to watch these days? Are some apps or programme guides easier to use than others?

How often do you use the traditional TV schedule to find programmes to watch? Is this still relevant to you?

How useful are the recommendations some apps give you based on what you've watched before? Do you ever get "rogue recommendations" because someone else has been watching with your user profile?

PSB Content

How much do you watch the traditional 'public service' channels like BBC One to Four, ITV1, Channel Four and Five these days (or programmes from those channels on the iPlayer, ITV Hub etc.)?

What programmes do you watch on these channels and why? [PROBE ON E.G. FORCE OF HABIT/ ROUTINE, ACCOMPANIMENT TO DAILY LIFE, SHARED VIEWING EXPERIENCES, DIFFERENCE TO PROGRAMMES AVAILABLE ELSEWHERE]

How much of your viewing of these channels is via streaming services like the BBC iPlayer or ITV Hub – whether it is on-demand or live streaming of programmes?

Do you use streaming services like the BBC iPlayer or the ITV Hub to browse and discover new programmes to watch, or to access box sets, or do you just use them for catch-up? [PROBE FOR DETAILS]

What is your overall attitude to the BBC these days? Why do you say that?

To what extent is your opinion of the BBC shaped by the specific programmes you watch, or other BBC content like its news output? Are there other factors which influence your opinion too? [PROBE FOR DETAILS]

Radio and other audio content

When, where and how are you listening to radio or music and other audio content these days? And how has this changed? [PROBE FOR ONLINE AND ON-DEMAND LISTENING, MUSIC STREAMING (E.G. SPOTIFY) USE OF PODCASTS, LISTENING VIA SMART SPEAKERS, DAB, DTV AND MOBILE DEVICES.]

Has the pandemic had any impact on your listening habits (e.g. less time in the car, access to more options at home)?

Do you have a paid subscription to a music service like Spotify, YouTube Music or Apple Music? When and where do you listen to this? [PROBE FOR DETAILS]

Do you ever listen to podcasts? If so...

Which podcasts do you listen to and how often? What do you particularly like about them?

How do you listen to them? [PROBE FOR DEVICES AND PLATFORMS – E.G. BBC SOUNDS, SPOTIFY, APPLE PODCASTS – USED FOR LISTENING]

Has this had any impact on your radio listening, or your consumption of any other media?

When do you listen to the radio (if at all) these days?

[WHERE RELEVANT] Is it easy to access the stations you're interested in on devices other than a radio set (e.g. smart speaker, mobile)? [IF NOT, PROBE HOW THIS MIGHT INFLUENCE THEIR BEHAVIOUR]

What do you get from listening to the radio that you can't just get from podcasts or a music service like Spotify (etc.)?

Internet: Overview

Has the way in which you access websites, apps, online services and social media changed over the past 12 months? [PROBE ON CONSUMPTION/ROLE OF DIFFERENT DEVICES, ESPECIALLY SMARTPHONES AND TABLETS.]

Would you say you are using more or fewer websites, apps, online services and social media these days? Why is that?

What new things are you doing online that you weren't 12 months ago? Who or what has inspired you to do/try them?

Have you done any more or less online shopping than previously? Why (not)?

[limited/NEW users of internet] What is stopping you from using the internet more, or doing more things online? Have you tried to overcome these challenges, either by yourself or by seeking help or advice from others?

Is there anything specific that you'd like to be able to do (online), but can't? What is stopping you?

Social media

How has your use of social media (Facebook, Twitter, Instagram, LinkedIn etc.) changed over the past year? Which are you using, which ones are you using more or less, and why? Are you using any new ones?

How often do you look at social media? Do you look at certain ones more than others? Why is this?
[PROBE ON E.G. PERSONAL PREFERENCE VS ABILITY TO ACCESS SPECIFIC SOCIAL GROUPS]

What kind of content do you post on social media (e.g. photos, videos, comments)? Do you post (or share content) more or less than you did last year?

Has your attitude to social media companies like Facebook or Twitter changed in the last year? How and why?

[FOR THOSE WITH CHILDREN UNDER 16] Do your children use social media at all? Which ones?

How aware are you of what your children are doing/viewing online? How closely do you monitor their internet use? Why (not)? How (e.g. looking over their shoulders, setting content filters, managing privacy settings, etc.)?

Messaging apps

Do you use any of the instant messaging apps (e.g. WhatsApp, Facebook Messenger, Snapchat)?
[PROBE FOR USE OF APPS FOR MESSAGING VS VOICE AND VIDEO CALLING]

Has your usage of them changed in the past year? Have you started using any new ones?

Have you experienced any issues with untrue, inaccurate or misleading information being shared through these apps? [PROBE SPECIFICALLY FOR ANY COVID-19 RELATED MISINFORMATION]

YouTube and other VSPs

How often do you watch YouTube? More or less than last year?

Do you watch videos on any other sharing platform (e.g. TikTok, Twitch, Snap)? [WHERE RELEVANT PROBE ON WHETHER OR NOT THEY HAVE CONTINUED USING TIKTOK AND, IF NOT, WHY NOT]

Do you have your own channel, or post video content to YouTube, Twitch, Snap, etc.? What about sharing, reviewing or commenting on videos?

What do you watch on YouTube (etc.)? Are there specific people or channels that you go back to regularly? [PROBE FOR DETAILS]

Do you trust what you're watching on YouTube (etc.)? More or less than what you see on TV, for example? Why (not)? What about other content you view online?

eDemocracy

Have you used the internet in the last 12 months to access information from the government or public services like the NHS (e.g. about lockdown rules), or to contact (local) government or public services? [PROBE FOR DETAILS.]

Has the pandemic led you to get more involved with any local community groups or neighbourhood networks (either online or offline)?

[WHERE RELEVANT] Do you ever feel that you are at a disadvantage compared to other people because so much contact with government and public services is now online?

Harmful/hateful and inappropriate online content

Have you (or anyone in your family) seen anything that upset or offended you in the last 12 months on social media, video sharing sites, messaging apps or any other online media you use?

[IF YES] What was it about it that upset or offended you?

Was it aimed at you, or someone else?

Was it aimed at a particular group or type of person (e.g. religious, sexuality, disability, gender)?

What, if anything, did you do about it (e.g. ignore it / report it / respond to it / make a comment / unfriend that person, etc.)? Why?

[IF HARMFUL CONTENT WAS REPORTED] How easy was it to report? What response did you get?

Did it put you off visiting that site/platform again?

[IF NO] Would you know what to do if you were to see something that upset or offended you online, for instance on social media or messaging apps (e.g. ignore it / report it / respond to it / make a comment / unfriend that person, etc.)?

Overall, would you say that you've seen more or less harmful, hateful or inappropriate content online in the last year, compared to previous years?

[PROMPT USING THE FOLLOWING EXAMPLE IF IT DOESN'T COME UP SPONTANEOUSLY...] Were you aware of comments on social media directed at England footballers Marcus Rashford, Jadon Sancho and Bukayo Saka after England lost their Euro 2020 penalty shoot-out against Italy?

Did you see any of these or do you just know about it through reports in the media?

Did you feel personally affected or offended by such comments?

Are you aware of new legislation – called the Online Safety Bill – going through Parliament at the moment? [PROBE FOR DETAILS]

What are the biggest safety issues you would like a bill like this to address?

[PARENTS ONLY] As a parent, what are your greatest fears (if any) for your child's safety online?

Privacy and Security

How aware are you of social media such as Facebook and Instagram serving up specific posts and advertising to you based on content you have previously viewed, liked or commented on?

What do you think are the benefits or drawbacks of this?

What concerns, if any, do you have about giving your personal data (e.g. address, phone number, email address) to websites or apps?

In what circumstances are you happy to give your personal data to websites or apps? [PROBE FOR DETAILS] What, if anything, would you expect in return?

Have you had any bad experiences in the past year as a result of giving your personal information to a website or app?

How much information do you make public on your social media profiles? Has this changed in the past year?

Do you feel you have a good understanding of who your personal data is being used by, and what for? Does this give you any cause for concern?

Have you received any "scam" emails, texts or phone calls in the past year from people pretending to be (e.g.) your bank, Inland Revenue, Royal Mail or other such organisations, trying to get you to pay them money, or get hold of personal information such as your bank details? [PROBE FOR DETAILS]

How convincing was the scam? Were you tricked?

[IF NOT] How long did it take you to realise this was a scam? How did you spot this?

What did you do about it (e.g. report it, mark it as spam)? [IF NOTHING] Why not?

Do you have any other particular concerns about the security of your information online at the moment? Do you always feel safe when you are online? If not, when and why not?

Gaming

Do you ever play games (either on your computer, phone, tablet or on a games console)? [PROBE FOR DETAILS OF WHICH PLATFORMS ARE USED FOR GAMING]

Do you have any kind of gaming subscription (e.g. Playstation Plus, Xbox Live, EA Play, Apple Arcade)?

How much of your gaming is online (either because the game itself is online, or because you're using the internet to talk to other people while you play)?

Which games (or what types of game) do you play most often, and why?

What motivates you to play online? [PROBE FOR DETAILS, E.G. TO RELAX, TO KILL TIME, A SOCIAL ACTIVITY, JUST FOR FUN]

Do you play or chat with other people (online) while you are gaming? Are these friends or strangers? [PROBE FOR DETAILS]

Have you played more games over the past 18 months as a result of the Coronavirus pandemic?

News

How are you accessing news these days? How has this changed at all in the past year? [PROBE SPECIFICALLY ON THE ROLE OF SOCIAL MEDIA, WORD-OF-MOUTH IN NEWS CONSUMPTION.]

Have you been watching/reading/listening the news more (or less) often than you usually do since the start of the pandemic? Why (not)?

Are you looking at any different news sources now, compared to a year ago? [PROBE ON ALTERNATIVE SOURCES MENTIONED IN PREVIOUS WAVES]

Which sources best help you understand what is going on in the world?

Are you interested in local news? If so, where do you get this from?

Are you more or less interested in local news than you were this time last year? [WHERE RELEVANT, PROBE WHETHER ANY PREVIOUSLY REPORTED INCREASED INTEREST IN LOCAL NEWS AS A RESULT OF THE PANDEMIC HAS DECLINED OR BEEN MAINTAINED.]

News websites and apps, as well as social media, sometimes choose which specific news stories to show you in your feed based on your prior behaviour. How aware are you of this happening, and how do you feel about this?

Are you more or less trusting of the news you see or hear on TV, radio or online these days? Why?

How important do you think it is for news sources to be impartial? Do you think the news sources you use are all equally impartial? [PROBE FOR DETAILS]

Have you seen anything in the past year that you would consider to be "misinformation"? If so, how did it make you feel and how did you react?

How often do you try to check the accuracy of the news you see or hear (e.g. by looking at alternative sources)? [PROBE FOR DETAILS]