



ADULTS' MEDIA LIVES 2019

A report for Ofcom

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1. INTRODUCTION TO THE STUDY

Ofcom's Adults' Media Lives study was originally set up in early 2005 to provide a small-scale, rich and detailed qualitative complement to Ofcom's quantitative surveys of media literacy. Whereas the surveys seek to quantify in a statistically robust way different levels of media access, awareness, skills and understanding, Adults' Media Lives aims to provide a human face to the data.

This 14-year ethnographic video study has tracked the changing nature of individuals' relationship with digital 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.

Each participant is interviewed in-home and at length (each interview lasts around 90 minutes). This allows both for a full exploration of the relevant issues and for demonstration/observation of media use in-situ. Fourteen waves of research have now been conducted; the first was in February 2005, with all the subsequent waves in October. The most recent interviews were conducted between 3rd October and 8th November 2018 by Mark Ellis, Tony Harbron and Tony Palmer of The Knowledge Agency.

The number of participants in the study is relatively small, but these people have been chosen carefully to reflect a broad cross-section of the UK population in terms of age, location, ethnicity and social circumstances. The unique methodology has allowed us to have extended discussions with these individuals, and to track their progress over time. Four of the 19 participants in the latest round of interviews have been part of the study since the start (2005), and seven more joined the study in 2006. As the profile of the sample becomes – by definition – progressively older, we have regularly recruited new participants at the bottom end of the age range.

Certain subjects have been tracked consistently each year; many of these have been subject to great change over the fourteen years of the study, for example:

- Acquisition of new media hardware (smart TVs, smartphones, tablets 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);

- Use of mobile devices to consume content;
- Sources of knowledge and information about media;
- Trust in media providers across different media platforms;
- Concerns about privacy, security and safety.

However, the research model is flexible enough to explore specific topical and/or emerging issues each year. For example, in the latest interviews, experience of harmful and hateful content, and attitudes towards internet regulation.

All interviews are filmed, and video is the main vehicle for the presentation of findings from the research. The key insights from each individual interview have been clipped and catalogued by theme, platform and participant each and every year of the study. This cumulative collection of around 5,000 video clips now represents a uniquely rich and detailed resource for exploring changes in attitudes to digital media and media literacy issues in the UK. It is used widely across Ofcom and in presentations to a range of stakeholders.

This study provides rich contextual insight into trends that are observable through large scale quantitative surveys. It also acts, on occasion, as a bellwether, indicating a direction of travel in terms of attitude or behaviour that is 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.

2. OVERVIEW

Key insights from the 2019 wave include:

Living with technology (Section 3)

- Online behaviour is increasingly segmented across the sample, with a clear difference between those who use the internet for what might be described as “basic” tasks, and those who are using it for a wider and more diverse range of activities. The latter group includes a growing subset of participants who now use social media platforms proactively as part of their work – either promoting their own businesses or the organisations they work for.
- Changes in lifestage and domestic circumstances continue to impact greatly upon media usage and attitudes. Some younger participants described themselves as “growing up” and having less time to spend on (e.g.) social media. Some older participants are becoming more housebound, which means that they are more dependent on media technology both for entertainment (e.g. TV) and practical support (e.g. online shopping).
- There were numerous examples of participants using information tools to become more savvy customers. These included conducting online research to find the best new deal for mobile, broadband and TV services, and using apps and/or email notifications to check their bills and keep tabs on their data usage.
- More participants are now accessing a range of online learning opportunities. These included formal education, work-based learning and informal learning opportunities via YouTube videos, specialist educational sites, Facebook groups, etc. However, such use is concentrated among the internet savvy, and is not necessarily empowering those with less confidence or less appetite to learn to try something new.
- Cameras are being used more for online communication and other applications. There has been a marked increase in claimed use of FaceTime and Skype, examples of participants enjoying the benefits of specialist apps which exploit their devices’ camera functionality, and increased interest in dashcams and bodycams.

- There are growing concerns about media technology “spying” on users. Some of these related specifically to “always on” voice-controlled technology such as Amazon’s Alexa. However, several participants also spontaneously cited examples of being served ads related to the topics of their face-to-face conversations (not using technology at all).

TV, streaming and video content (Section 4)

- There is evidence of yet further fragmentation of participants’ viewing behaviour – by platform, device and time. 6 of our 19 participants now claim that they don’t have a TV set at all or, if they do, it is not connected to a traditional terrestrial/satellite/cable service.
- There has been an increase in claimed viewership of YouTube, sometimes at the expense of traditional TV. This year, for the first time, two of our participants claimed that YouTube is now their first port of call for “TV viewing”.
- Many claim that “live viewing” on a TV set is now quite rare.
- TV “moments” still exist, but they are becoming less frequent, and different in character. Special personal or social TV-viewing occasions continue to form an important part of participants’ weekly routine, but these were often specific to the individual or the household in question, and usually dictated by domestic circumstances.
- PSB channels were seen to have “upped their game” in the past year in response to competition from Netflix etc. Many of the programmes cited as examples of high quality programming were produced by PSB broadcasters. These included *Bodyguard*, *Trust*, *The Cry*, *Killing Eve*, *Unforgotten*, and *Strangers*.

Content, regulation and trust (Section 5)

- Some participants expressed a growing sense of disillusionment with media organisations and tech giants. Others described themselves as frustrated by what they saw as the compromising of user-generated content by commercial interests, or by profiteering individuals on platforms like YouTube and eBay.

- When asked to explain what they considered to be harmful or hateful content, most participants found it difficult to define this in their own terms. However, many said they had experienced spam email, dubious online advertising or online privacy/security issues and a few had experienced online bullying or videos with offensive content. When asked what they would do if confronted by such content, many claimed that they would ignore it, rather than report it.
- The regulation of online content was seen as a challenging and complex task for which all parties involved – content creators, platform owners and consumers – share some responsibility, with a possible role for a regulator acting in an ombudsman role.
- Some participants claimed to be consuming less news and/or news from a narrower range of sources than before. This is, in part, a by-product of lower claimed levels of TV viewing in general.
- A small but significant group of participants (around a fifth of the overall sample) claimed to be using YouTube to access user-generated news content and/or websites such as Rebel Media. These individuals sometimes expressed a deep mistrust of mainstream news channels (partly fuelled by what they have seen and heard on these alternative sources).
- Several other participants, despite being generally supportive of the BBC, were nevertheless critical of BBC News, and in particular its perceived focus on “balance”.

Personal data, privacy and security (Section 6)

- Participants displayed increased awareness and sensitivity about the collection and use of their personal data. Incidents such as the Cambridge Analytica affair appear to have had a lasting effect on user confidence. As a result, some participants described themselves being more careful about how they now share their data (e.g.) when they sign up to public wi-fi.
- However, participants’ level of understanding of how their personal data is collected and used, and what the rules governing personal data are, varied enormously. Some believe that content providers make it as difficult as possible to understand these purposes.

3. LIVING WITH TECHNOLOGY

3.1 Online behaviour is increasingly segmented

We have seen a constant evolution in participants' online behaviour over recent years of the study. With the exception of one participant, all are now regular internet users at home and/or work, and the majority at least sometimes access the internet via a smartphone and/or tablet. However, users' patterns of online behaviour are quite diverse and a clear segmentation is visible between those who use the internet for what might be described as "basic" tasks, and those who are using it for a wider and more diverse range of activities.

There are a few core online activities which almost all participants do regularly (accessing social media, messaging, shopping, watching or listening to streaming services and YouTube); these core activities lend themselves readily to apps and mobile devices, and much of their use is via such devices.

Participation in a broader range of activities (including using the internet for research, learning and study support, job hunting, banking, fitness tracking, dating, gambling, etc.) is more sporadic. These are most likely to be undertaken by younger, more educated and more digital media-savvy participants. Unlike the core activities, they are also most often conducted via a web browser on a PC.

"We've been doing a lot more research on the internet for different types of apprenticeship... We used the Government website quite a lot... It has been really, really easy for us to use, and it has been really good."

Male, 44, Engineer, Rural Derbyshire

"I did my poetry this year... My plan was to do 100 poems in eight months. I created my own domain and set up a WordPress... I was posting maybe a poem every couple of days onto my WordPress blog. After about number 30 I also set up an Instagram page."

Male, 23, Tutor, London

“Because I’m not artistic or creative, I’ve been using the Photobox [to make things]. I could have easily got carried away. I have had to stop myself. At one point I had cushions, cups, everything, and I thought ‘this is looking a bit freakish so I’ve really got to stop!’”

Female, 52, Housing Officer, Coventry

With the exception of one participant who is a web officer for a museum, participants’ use of the internet has been primarily for home/leisure use, or conducting basic communications tasks related to their employment (checking work email etc.). In 2018, however, there was evidence of a growing subset of participants using social media platforms proactively as part of their job – either promoting their own business or the organisations they work for online.

One participant (a gymnastics coach) has taken on the role as “social media influencer” for her gym. Another is managing a website and social media profiles to promote her own business organising specialist holidays. And one of our students is financing her studies by promoting her make-up business on Instagram.

“For my job I’m like the social media influencer, kind of, so I’m in charge of the Instagram page.”

Female, 18, Gymnastics Coach, Coventry

“We’re in the second year of having our own side business... I’m really using things like Facebook and Twitter to focus down the audiences we’re speaking to.”

Female, 41, Fundraising Manager, Cardiff

Digital literacy seems to be becoming an increasingly important, valuable and (potentially) necessary skillset for people whose job would not naturally be considered as IT or marketing-related.

3.2 Changes in lifestage and domestic circumstances continue to impact greatly upon media usage and attitudes

In the first wave of Adults' Media Lives (in 2005) we concluded that changes in lifestage and domestic circumstances impact greatly upon media usage and attitudes. This continues to be the case in 2018, and there were numerous examples of this in the 2018 interviews.

Some of our younger participants described themselves as “growing up”, approaching major exams or entering the world of work for the first time, and therefore having less time to spend on (e.g.) social media.

“I’m probably spending less time using media, because I don’t have the time... I think everyone is busier now. We’ve got to that age when you either have full time jobs or you’ve moved away to Uni, so I’m using it less to chat.”

Female, 18, Gymnastics Coach, Coventry

Some of our older participants described themselves facing different issues. Getting older and being increasingly housebound means that they have more time to watch TV, for example. In some cases they were particularly appreciative of the benefits of online shopping (home delivery).

“In the past year I haven’t been in very good health. I’ve been into hospital twice. It has held me back a lot. I’m housebound for the time being. Unless somebody takes me out I haven’t got the confidence to go out... I’m sitting down a lot and watching television, and there isn’t an awful lot on television that’s entertaining during the day – it’s all repeats mostly.”

Female, 85, Retired, Coventry

“As I get older I probably won’t be able to go round the shops for much longer, so I found it advantageous to shop online and either get it sent or collected.”

Female, 74, Retired, Edinburgh

For others, individual changes in their career and/or work patterns have presented them with different opportunities to engage with media. For example, one of our participants was, until recently, a banker in the City of London. He's now on "gardening leave", with plenty of time on his hands whilst he assesses future options.

"I'm listening to podcasts a lot more than I would do otherwise, I'm watching more TV... [I've got] more time to watch things that I might not have done, commit myself to a box set that I might not have watched before because I wouldn't have had the time... I might not have even seen these new opportunities to do things."

Male, 35, currently on gardening leave, London

Lastly, there was evidence of financial issues limiting access to devices and/or services for some participants. Around a quarter of the sample cited some kind of financial constraint meaning that they had to cut down on – or forego altogether – media services they would ideally like to have access to.

"We don't have box sets or anything like that [as part of Sky subscription]... I did say to them 'I'm really struggling, I'm thinking of cancelling it all' and they said 'Well, we'll do you a deal!..'"

Female, 45, Stay-at-home Mum, Rural Essex

"For the next few months financially we can't do much... I'm off work, unfortunately, and when I do go back to work I can't do any overtime until I've been completely signed off. I'm just on light duties at the moment."

Male, 32, Station Assistant, Birkenhead

3.3 Use of information tools to become more savvy customers

There are numerous examples of the internet empowering our participants to do things they wouldn't otherwise be able to do, or to make better informed decisions than might otherwise be the case.

Information tools are now helping many of our participants to be more savvy shoppers and/or customers. Numerous practical instances of this were cited in this year's interviews. These included examples of participants conducting online research to help them get the best new deal for their mobile, broadband and TV services, or gaining knowledge, insight and advice to help them to negotiate a better deal with their current supplier...

"I sat down and spent about a day just looking at every provider offering the same deal I was after... I just rang O2 up and said 'Look, Vodafone are offering me this' and they said 'All right then, we'll match that'."

Male, 20, Student, Leeds

With regard to mobile phone services in particular, individual participants found a range of solutions to fit their personal needs, including unbundling phones and contracts and going SIM-only to save money.

Unlike in earlier years of the study when the arrival of a new model of a popular handset would be seen as a major event, and many would aspire to upgrading, very few of our participants now upgrade to the latest generation of handset. In fact this year some had chosen to upgrade to a more modest handset (e.g. iPhone 8, rather than iPhone X), while others had decided to persevere with their current handset, not seeing any immediate need to upgrade.

"In May I'm not going to [sign another contract]. I'm going to go SIM-only and keep this phone, 'cause this phone is fine. I don't have Instagram or anything like that so I don't really use it as much as I should."

Male, 29, Bar Manager, Bournemouth

“It’s sufficient for what I need it for, which would be mainly the phone, texts and WhatsApp.”

Male, 64, Semi-retired, Pinner

Some participants described themselves using either apps or email notifications to check their bills and keep tabs on their data usage. Unlike in some previous years, none reported having received unexpectedly large mobile phone bills as a result of going over their data allowance.

“Just on the first of every month I have a routine check to see if everything has gone out as it should, the right amount of money and so on.”

Male, 20, Student, Leeds

“They’ll alert us when it’s 80% [data usage] then I can just make sure that I sign on to the wi-fi wherever I’m using the phone.”

Male, 39, Web Officer, Cardiff

Lastly, some participants described proactively managing subscriptions for streaming services and channel packages so they can get access to the content they are most interested in as cost effectively as possible. While some continue to subscribe to services they rarely or never use, there were significantly more incidences this year of participants chopping and changing between services on a regular basis, or downgrading, pausing or cancelling subscriptions that offer no short-term benefit.

“I’m still with Netflix. I’ve reduced the service. I think it’s only a saving of £1.00 or £1.50 but I’ve reduced it from two screens to one because rarely does either me or my wife have the opportunity to watch anything whilst the kids are around.”

Male, 39, Web Officer, Cardiff

3.4 More participants are now accessing a range of online learning opportunities

Over recent years we have witnessed more uptake of online learning opportunities among part of our sample. The use of such services has become more widespread over the past year, and many of those who do access online learning now find that it plays an increasingly important role in their life.

Online learning of this sort falls into three main categories:

Formal education as part of, or in support of, schoolwork or higher education...

“So for work and exams I mostly use internet sources, rather than textbooks, because they’re often cheaper, and they’re easier to use than a text book.”

Female, 30, Doctor, Surrey

“At Uni we do something called Skills Network. You can get access to learn how to write properly – critical writing – or something like SPSS which is something I’m going to need to use to do my dissertation this year. I do quite a lot of stuff like that.”

Male, 20, Student, Leeds

Work-based learning, or courses to support participants’ professional development was an area of particular growth this year – but almost exclusively amongst those individuals who were already internet-savvy. This was partly driven by the introduction of new legislation relating to personal data (several participants had undertaken GDPR training online), but also as part of an ongoing trend towards more home-based working.

“I’m going to do my Pre-School [training qualification] course and my Level 3 course this year, and British Gymnastics have moved a lot of it online now, so I’ll have to do a few questions and watch a few PowerPoints on my laptop before going to the course.”

Female, 18, Gymnastics Coach, Coventry

“I’ve done a few things for work around IT... Work have recently introduced the online Health and Safety courses, and things like GDPR which we’re all expected to do. That has been rolled out online.”

Male, 39, Web Officer, Cardiff

Lastly, a number of participants described themselves pursuing informal learning opportunities via YouTube videos, specialist educational sites, Facebook groups, etc.

“I’m not a DIY expert, but I watched a few YouTube channels yesterday. I’ve seen how to change a tile on the roof, put cement on the wall... how to fix things in the garage already.”

Male, 32, Station Assistant, Birkenhead

“General Assembly – I signed up to that to learn a bit of coding. In fact I’ve got something I’m going to do tonight where I’m on a workshop with them for two hours learning some SQL*.”

Male, 35, currently on gardening leave, London

(* SQL = Structured Query Language, an international standard for database manipulation.)

In principle learning has become more accessible and affordable, but the evidence from our research is that usage is concentrated predominantly among the more educated and/or affluent participants – for those who already have an appetite for learning there are many new and exciting opportunities, but these do not automatically empower those who lack such an appetite.

3.5 Cameras are being used more for online communication and other applications

There were no major changes this year in the uptake of devices and services amongst our sample, but how they are using their devices does seem to be changing. In particular, more of our participants are now using the camera functionality of their smartphones for a wider range of activities. These include:

A marked increase in claimed use of FaceTime and Skype, in terms of the proportion of participants using these services (around a third of the sample), the frequency with which they use them, and the importance they place on them...

“Normally twice a week I’ll FaceTime my Mum... I’ll FaceTime my friends in Manchester who go to University there, every couple of weeks maybe... people in the house – my housemates!”

Male, 20, Student, Leeds

“FaceTime is tremendous, really. We speak to our son in New York, and whilst it’s not perfect and it does break down, it’s great.”

Male, 74, Retired, Warwick

There were also specific examples of participants enjoying the benefits of smartphone apps which use the camera to add value to certain tasks. For example, one participant who is a gymnastics coach was using an app on her iPhone to film and give feedback to the athletes under her tutelage.

“For my job obviously I’m coaching a lot and it’s very technical. When I film one of my gymnasts it’s easier if I can see it on a bigger screen so I can correct their mistakes. I’ve got an app called Coach’s Eye where I can write on it, tell them what degree to take off from and stuff. So it’s easier for me to see them, and for them to see themselves as well.”

Female, 18, Gymnastics Coach, Coventry

Beyond smartphones, some participants praised the perceived security benefits of other camera-based technology such as bodycams and dashcams.

“We have to wear body cameras now. In my eyes it’s the best thing ever. Every time an incident [e.g. racist abuse] happens, the people get shown the footage... They can’t deny it. They’re very apologetic... but there’s no excuse.”

Male, 32, Station Assistant, Birkenhead

“Say there’s a fight in the street... They’re arguing who hit who first and who’s to blame... You can always guarantee that someone, somewhere will have recorded it so you’ll be able to find out who hit who first.”

Male, 44, Engineer, Rural Derbyshire

However, attitudes towards the growing use of cameras were not unequivocally positive – even amongst those participants who praised the benefits. In particular, several voiced concerns about bystanders filming and sharing events in public spaces. These concerns frequently centred on invasion of privacy, but not to the exclusion of other issues.

“The first thing people do is get their phone out. Car accident? They film it. And I think it’s disgusting that people slow down to film a car accident. That could have been your family... I think that’s ghoulish, it’s quite scary.”

Male, 32, Station Assistant, Birkenhead

3.6 There are growing concerns about media technology “spying” on users

Numerous participants raised spontaneous concerns about connected devices of one sort or another “spying” on them.

Some of these concerns related specifically to “always on” voice-controlled technology such as Amazon’s Alexa, and what information may really be recorded (there was press coverage of these issues around the time of the fieldwork which may well have exacerbated such concerns).

“Not only is Alexa giving you information, they’re listening to everything you say. Alexa’s listening to everything you say... The spy in every home. It’s like the Trojan Horse. No thank you, Alexa!”

Female, 57, Casual Worker, London

“I know now that when police officers go and look at a house for search, one of the first things they take is this device [smart speaker], because of what it’s recording in the background.”

Male, 64, Semi-retired, Pinner

There were other concerns, however, unrelated to Alexa etc. Four participants spontaneously cited examples of being surprised to see ads in their web browser or social media newsfeed related to the topics of face-to-face conversations they have had with friends/family (not using technology at all). They concluded that their devices (smartphones etc.) must be eavesdropping on them.

“We all think we’re losing our minds because we’ll be talking about something and then it will pop up on your phone, and you think ‘Hang on a minute, what’s going on here?’. Someone must be listening to you through your phone.”

Male, 20, Student, Leeds

“Literally a few days ago I was sat here with my friend. We were on his phone and he was showing me some posters he wanted to buy for his room. One of them is a Japanese painting – I think it’s called ‘The Big Wave’. It’s quite a famous image. We were talking about ‘The Big Wave’ and looking at it on his phone. Later I was on my Facebook on my own tablet. I was scrolling through and an advert came up for a poster of ‘The Big Wave’. I don’t know if it was because the phone is listening in, or because we’re on the same wi-fi, but that was just a bit odd.”

Male, 23, Tutor, London

While surprised, the participants in question were not overly concerned by these occurrences. Most assumed that the data is “only” being used for commercial purposes currently. However, a few did raise concerns that it might not be long before such techniques could be exploited to serve more sinister purposes.

“I have information coming from people who are politically active, and I have no doubt that some of them are people of interest to people who want to monitor that sort of activity... In a previous life in South Africa, we had our phones monitored, so there is an experience there that tells me that it doesn’t matter how innocent you might be, if you do certain things it triggers a reaction.”

Male, 74, Retired, Warwick

4. TV, STREAMING AND VIDEO CONTENT

4.1 There is evidence of yet further fragmentation of participants' viewing behaviour

In line with what we have reported previously, participants described themselves as having increasingly diverse patterns of viewing – by platform, device and time. In part, this trend has been accelerated by the more widespread adoption of smartphones with bigger and better screens, making this a more viable and enjoyable viewing option.

“I’ve got BBC iPlayer and YouTube and stuff like that. I watch quite a lot of things on them... I start work at 5.00 and don’t finish ’til 3.00 in the morning and there’s nothing on telly to watch at 3.00 in the morning. To wind down I’ll watch something, maybe on ITV Hub, on my phone.”

Male, 29, Bar Manager, Bournemouth

6 of our 19 participants now claim that they don’t have a TV set at all or, if they do, it is not connected to a traditional terrestrial/satellite/cable service.

“I don’t have a living room, I just have a room, so I don’t have a television. I don’t catch the news, really, I’m not just watching channels that are on. If I want to watch something it’s me going on my laptop to look for what I want to watch.”

Female, 18, Gymnastics Coach, Coventry

“It sort of is a conscious decision, because we like not having a TV, and because neither of us owns a TV set it would be a reasonable cost to get one. The place was unfurnished. We’d buy a bed before we bought a TV.”

Female, 30, Doctor, Surrey

Participants continue to reference streaming services extensively in their discussion of viewing. The majority still have access to at least one subscription-based streaming service, although there has been some brand switching in the past year. Amazon Prime Video is now more popular than it was previously amongst our sample, although Netflix continues to have the widest reach (half of the sample have access to this either via their own or a family member's subscription).

4.2 Increase in claimed viewership of YouTube, sometimes at the expense of traditional TV

YouTube has been a popular viewing platform for many of our participants for a number of years. However its role has become more important as people have begun to watch more on mobile devices. This year, for the first time, two of our participants claimed that YouTube is now their first port of call for "TV viewing".

"It's actually one of the first things I'll go to before watching telly... In my flat now I'll make my dinner then I'll go through to my room and eat it. It sounds quite anti-social but I like knowing that I can go into my room, sit down for 60 minutes and watch YouTube."

Female, 26, Student, Edinburgh

"[I watch YouTube] literally every night, I'd say, if we're in watching the iPads. Invariably I would always have a look at something on YouTube. I think it offers me something different, something that I can't get on the television, something factual."

Male, 64, Semi-retired, Pinner

YouTube fits into participants' viewing patterns in various different ways, and the range of content consumed comes from a variety of sources.

- Bite-sized chunks of content from mainstream channels
- A wide range of specialist and factual content
- Vlogs and other user-generated content

“My youngest son was learning to fly and there were a number of technical programmes that interested me, so as he was taking his tests I was looking at the criteria and the various bits and pieces of it.”

Male, 64, Semi-retired, Pinner

“I watch various bits of music review stuff. There’s one YouTuber called Anthony Fantano who I think is probably the most famous music reviewer personality on the internet. He reviews about three or four albums a week.”

Male, 23, Tutor, London

“It’s mindless stuff and now I’ve moved in with my boyfriend I get scolded if I get caught watching it... It’s bloggers and a lot of it is promoting things, but they’re like ten-minute long videos and I will watch them in bed on a Sunday morning... I needed a new pair of winter boots, I like those ones, so job done, I’ll just get them.”

Female, 30, Doctor, Surrey

As well as being seen as an alternative or replacement for TV by some (especially those viewing mainly on mobile devices), YouTube was also consumed as second-screen content whilst simultaneously watching TV.

“The time just flies because you’re watching TV and doing YouTube, and I like to catch up on all the gossip that’s going on with stars and so on. [I do it for] hours.”

Female, 57, Casual Worker, London

4.3 Many claim that “live viewing” on a TV set is now quite rare

Our two oldest participants (who earlier described themselves as having to spend more time at home alone) both claimed to be watching more live TV in 2018. However they were very much the exceptions to the rule. Most participants described themselves devoting less time to live TV viewing.

“I’m very selective. I hardly ever sit down and watch live telly, like ever. I actually don’t do it at all. I only watch things that I record, or that I go on BBC iPlayer to watch.”

Female, 26, Student, Edinburgh

“To be honest, we never watch stuff in real time. We’ve just finished watching *Press*, but that finished a couple of weeks ago. The same with *Bodyguard* – that finished before we ended up watching it.”

Female, 41, Fundraising Manager, Cardiff

In contrast to the older participants, our 35-year-old participant who is on “gardening leave” from work, and therefore has more time and opportunity to view, described himself as less likely than ever to watch live TV.

“Certainly more recently, in the last month, the amount of stuff that I’ve watched that’s been recorded is higher than ever before, in terms of watching stuff on-demand on Netflix, watching films on demand, watching things that I’ve recorded. I think that’s down to having more time.”

Male, 35, currently on gardening leave, London

Others described their relative lack of engagement with live TV viewing – this is often accompanied by “second screen” activity.

“Unless it’s on in the background, I’m not watching real-time television so often, and so I’m being selective about the programmes that I watch.”

Male, 74, Retired, Warwick

“I think it’s habit to come home and put the TV on, or to get up in the morning and put the TV on. It’s just there in the background, like the trees are there outside or the mirror looks nice... it’s sound and movement.”

Female, 57, Casual Worker, London

4.4 TV “moments” still exist, but they are becoming less frequent, and different in character

In an era of more fragmented and personalised viewing, we might assume that special TV viewing occasions which create collective engagement and discussion – sometimes called “watercooler moments” – no longer exist. Based on this year’s interviews this does not appear to be the case, although such occasions are perhaps less frequent, and different in character to the past.

Participants described special personal or social TV-viewing occasions, but these were often specific to the individual or the household in question, and usually dictated by domestic circumstances.

“I have this routine on a Monday night, as soon as I’ve been to Fat Club and given everyone a clap and a praise for doing really well... Because it’s Monday night and you’ve been weighed-in, it’s treat night isn’t it; it doesn’t count on a Monday night. So I would have everything ready to sit down and watch *Lucky Man*.”

Female, 52, Housing Office, Coventry

“That’s the only one I’ve watched almost every week [*Bodyguard*]. It was kind of a house thing; we just watched it every Sunday night at nine o’clock, live on the TV. It was just a time that we could all make, and we enjoyed the show... It makes it more social, I’d say.”

Male, 20, Student, Leeds

Some popular programmes (e.g. *Great British Bake-Off*, *Bodyguard*) still have the capacity to spark debate and discussion between our participants and their friends and family. These are described as the programmes most likely to necessitate live (or near-live) viewing – not least to avoid “spoilers”.

“You put your phone away with this kind of programme [*Trust*]. If you’re catching up, don’t look at your phone for a day, especially Facebook. Don’t read any messages, ‘I’ve not caught up, don’t tell me any spoilers.’”

Male, 32, Station Assistant, Birkenhead

When such programmes catch viewers’ imagination, they sometimes become a social media as well as a televisual experience.

“My wife’s got a group chat called ‘Great British Bakeoff’ with all her family on it... At the end of the series they’ll delete that group off WhatsApp... ‘See you next series!’”

Male, 32, Station Assistant, Birkenhead

4.5 Participants described various attributes of “high quality” programming

We asked participants how they would characterise “high quality” TV programming and streaming content. When asked to give examples of programmes they considered to be of high quality, most participants spontaneously cited drama programmes either primarily or exclusively.

Responses were varied, but common themes included:

- Quality of acting and cast
- Exotic, interesting locations (especially in travelogue-type shows presented by e.g. Joanna Lumley, Michael Palin)
- Intriguing, engaging plotlines with shock plot twists and compelling cliff-hangers
- Challenging productions which force viewers to think about what is happening, and keep them concentrating so they don’t lose the plot
- Credibility and realism (often linked to strong characterisation, and the ability of a drama to combine elements of pathos and humour)
- Representation and relatability (the portrayal of “people like me” and/or the representation of special interests such as the Welsh language)

“Things that can grab your attention. Because I’m so time poor it’s like reading a book – you give it a chapter. If it hasn’t grabbed you by the end of the first chapter you’re like ‘I can’t be bothered with this’... For me it could be that there’s a particular actor in it and I’ll give it three episodes, then I’m like ‘This is rubbish!’, but your loyalty is to that actor so you’ll keep bearing with it.”

Female, 41, Fundraising Manager, Cardiff

“I thought that *Killing Eve* was quite shocking. That’s my type of TV series... That was something that you really had to concentrate on to understand the storyline. You’d watch an hour of it a day and you’d really be fixated on it because you had concentrate on it, it was shocking... it wasn’t something that you could just lightly watch in the background.”

Female, 18, Gymnastics Coach, Coventry

“You still look for the good laugh, the feel-good factor, the camaraderie... Where you can almost be fighting back the tears and then they make you laugh on the back of it. I felt like it was the real world [Kay Mellor’s *Girlfriends*].”

Female, 52, Housing Office, Coventry

“S4C and BBC have been commissioning those dual language TV programmes like *Hinterland*, which I think are really good. Those things that are tapping into more popular TV, but are actually reaching people who do speak Welsh are a really important part of what they do... What’s brilliant about it is that it’s quite natural in terms of how people speak Welsh, so they drop into Welsh with certain people that they’re used to speaking Welsh with and they drop the subtitles on top. That’s very natural, that exactly translates into real life, so I’m glad to see that they’re presenting gripping drama in a way that’s relevant to people who speak Welsh.”

Male, 39, Web Officer, Cardiff

4.6 PSB channels were seen to have “upped their game” in the past year in response to competition from Netflix etc.

In last year’s wave, the quality of content broadcast by PSB channels was sometimes compared unfavourably with series appearing on Netflix, Amazon Prime and NowTV/Sky. These services were felt by some to have “raised the bar”, particularly for high quality drama.

This year, however, many participants felt that the PSB channels had responded positively to this challenge, and many of the programmes cited as examples of high quality programming (above) were produced by PSB broadcasters. The BBC (especially) and ITV were widely praised for multiple “excellent” drama series in their Autumn 2018 schedule (e.g. *Bodyguard*, *Trust*, *The Cry*, *Killing Eve*, *Unforgotten*, *Strangers*).

“*The Bodyguard* seemed really good – the ones that I watched – but you really had to watch and listen to it... *All About Eve* [sic] is similar... it’s enthralling.”

Male, 57, Alarm Fitter, Lisburn NI

“I think they’re actually upping their game with these kind of dramas... *Strangers*, *The Cry*, there’s a number of them that we want to watch, and they’re all coming out one after the other.”

Male, 32, Station Assistant, Birkenhead

“Everyone was going mental for *The Bodyguard* and my flatmate was saying ‘You need to watch it – it’s so good’... so I started watching it and I literally watched it all in two days. I dedicated a lot of energy to it, and it was really good.”

Female, 26, Student, Edinburgh

Beyond the quality of programming itself, there was also some praise for how PSB broadcasters are making their content available in more flexible ways.

This included the perceived evolution of BBC iPlayer into a platform for viewing box sets, and not just for catch-up, the easy availability of PSB-originated content on other platforms (e.g. *Unforgotten* on Netflix), and bite-sized chunks of comedy, current affairs and lifestyle programming being made available on YouTube.

“iPlayer was very much about being available [to catch up] for ten days, a month, whatever... I’m really glad that they’re starting to dig into their archives to pull out stuff that has been celebrated previously because I think that’s a really important aspect of what we’ve been paying for as licence payers.”

Male, 39, Web Officer, Cardiff

“When I’m on the treadmill in the gym and I’m fed up of music... sometimes I’ll YouTube little snippets of *This Morning* or something like that.”

Female, 18, Gymnastics Coach, Coventry

Some (particularly younger) participants who had claimed in previous interviews to have stopped watching PSB channels had been re-engaged by some of these programmes, and some claimed that this in turn had led them to re-assess their attitudes to PSB channels.

However, there was no evidence to suggest that this has substantially changed their routine viewing behaviour.

5. CONTENT, REGULATION AND TRUST

5.1 A culture of mistrust pervaded many aspects of this year's interviews

Participants appear to have become increasingly suspicious of media organisations and platforms. Whilst this could be seen as healthy scepticism – and therefore an indicator of increased media literacy – it is also a source of frustration for many.

Some expressed a growing sense of disillusionment with media organisations and tech giants – in this case one of our most technology and media-savvy participants, who until recently worked in the City of London.

“The tech industry has always presented itself as being responsible, being different. Other big business – petroleum, finance – that has never been their game. They have always been what they are, that is money-making machines and that is all they’re focused on. Tech has framed itself as ‘We’re your partners, we’re socially progressive, we’re all this and that’. So I think it feels to people like they’ve been cheated in a much deeper way... They care about soundbites; they care about people thinking in a certain way; they care about giving the image that they’re your partners in life and they can be a platform that you can have all your life memories on, and you’re in this together, but you’re absolutely not.”

Male, 35, currently on gardening leave, London

On a more mundane and personal level participants expressed frustration at what they saw as the compromising of user-generated content by commercial interests, and by profiteering individuals on platforms like YouTube and eBay.

“When I first started watching it [make-up vloggers on YouTube] it went from being a beauty community where you would come and learn about make-up from people who were passionate about make-up, to [a situation] where they were shoving sponsorships down your throat... Some people were getting paid \$60,000 to mention a product in a video.”

Female, 26, Student, Edinburgh

“This year they’ve released a special anniversary bike – I think it was £690. Within ten minutes of people receiving them, they’re on eBay wanting £1,000 for them. All the purists are just going mad.”

Male, 44, Engineer, Rural Derbyshire

Some voiced particular concerns about being sent spam email and served online advertising which they considered not to be truthful.

“I saw this [online ad for a] wooper-dooper, you-can receive-free-TV-through-it TV aerial. I sent it to my son and said ‘What’s all this?’, because he knows all about it. He said ‘It’s a scam... it doesn’t even work.’”

Male, 57, Alarm Fitter, Lisburn NI

Lastly, those who have suffered bad personal experiences (through online fraud, hacking, etc.) were particularly wary.

“I’m always wary when I get these messages [from Facebook] even if they pop up on our Facebook page, with business tips and stuff like that, because that’s how we got hooked into that whole hacking experience... It really did sting us, that.”

Female, 41, Fundraising Manager, Cardiff

5.2 Many participants had experienced spam email, dubious online advertising or online privacy/security issues

When asked to explain what they considered to be harmful or hateful content, most participants found it difficult to define this in their own terms. However, many said they had experienced spam email, dubious online advertising or online privacy/security issues and a few had experienced online bullying or videos with offensive content.

“Harmful content...? I don’t know really... People commenting on other people’s photos, giving them abuse for it, not liking them... stuff like that I guess.”

Female, 18, Gymnastics Coach, Coventry

“I’ve never experienced it. I just don’t think I use online in that way. I don’t post in any public chat rooms or anything like that. I only communicate with my friends online so I’ve never come across anything harmful or hateful.”

Female, 30, Doctor, Surrey

Most assumed that harmful or hateful content equated to the more extreme forms of online bullying or “trolling”. Only a few participants claimed to have had direct experience of such content online (although some others claimed to have seen it directed towards celebrities). Perhaps unsurprisingly, these individuals had a more nuanced understanding of what such content is and were more disturbed by its existence.

“It seems quite prevalent on Twitter. So I do flag up something that I see as abusive, harmful, racist – I’ve done it quite a lot, actually – especially over the last couple of years. It is also driven by things like Brexit – that kind of polarisation of our political views... I think I’ve taken a bit of it personally as well, especially as a Welsh language speaker.”

Male, 39, Web Officer, Cardiff

“There’s a footballer called Wilfried Zaha, who’s constantly being accused of diving... He’s even getting death threats, they’re going to do this and that to him. That’s just going completely off the scale, it’s daft. At the end of the day it’s a game of football.”

Male, 44, Engineer, Rural Derbyshire

More occasionally, participants cited examples of seeing offensive videos containing violent content or being aware of hateful content containing racial hatred or incitement to violence.

“Well I have had things sent to me that should never have been sent on the internet – mates have looked it up, you see this video and you think ‘Why have you sent me this?’. You see really violent things and a lot of other things nobody should see.”

Male, 57, Alarm Fitter, Lisburn NI

When asked what they would do if confronted by such content, many claimed that they would ignore it, rather than report it. For some this was because they were not overly concerned about the prospect of seeing such content; others claimed that they were concerned but had limited confidence in the platforms in question acting on such complaints.

“If it was directed at me, and I didn’t know the person, I’d probably just delete it and block them. If I knew the person I would probably just ignore it or just message them on the side. I wouldn’t ever make a show of myself and comment back... If I saw it [directed] to someone else, I probably wouldn’t do anything.”

Female, 18, Gymnastics Coach, Coventry

“Sometimes I won’t block because I kind of want to know if they’re still doing that... More often than not they will take down an abusive or harmful tweet, but I’ve also seen things that haven’t been taken down even though I’ve flagged it up. There’s not much of an argument back from Twitter.”

Male, 39, Web Officer, Cardiff

“You see stuff and you think ‘I don’t want to see that’. Twitter has no way of censoring what gets on there. And then people say ‘Oh my God, why is this on, I’ve reported this?’. In fact they’ll say stuff like ‘Let’s all report this’. Thousands of people will report it, but two days later it will still be there.”

Male, 20, Student, Leeds

5.3 The regulation of online content is seen as a challenging and complex task for which all parties involved share some responsibility

Despite their own limited direct experience of harmful content, almost all participants believed that stronger regulation of content published on the internet was desirable. Most felt that – in an ideal world – content creators would self-regulate, but this probably wouldn’t happen in practice.

“I guess in an ideal world the onus would be on the people who write it but the problem is that a lot of people are horrible, and they’re more horrible on the internet. So to me that just doesn’t work.”

Male, 23, Tutor, London

There were more mixed views on how much responsibility platform owners such as Facebook, YouTube, etc. should take for content which is posted there, and indeed how effectively they do this currently.

“I don’t think the social media company itself should be responsible because they really can’t control who logs on to it.”

Female, 18, Gymnastics Coach, Coventry

“There’s a difference between impassioned argument and just being horrible, and I don’t think it would be that hard to put together an algorithm that can detect the difference.”

Male, 23, Tutor, London

A small minority argued that it was the duty of the content consumer to protect themselves, by opting out of using a platform if necessary.

“I think the whole point of the internet is that it’s not like TV. I think it’s up to the individual to navigate their way. I mean, you don’t have to look at things if you don’t want to. You don’t have to read the comments. You don’t have to comment.”

Female, 57, Casual Worker, London

Most felt that the most viable solution for regulating internet content involves input from all parties involved – content creators, platform owners and consumers.

“I do think that I have to have some responsibility as her parent for what she views. I totally get that. I would never say that that’s not my job. But then you have to have some accountability for the person that publishes whatever’s on the internet as well, because it is an amazing tool in itself, but it’s so easily abused.”

Female, 41, Fundraising Manager, Cardiff

Several participants spontaneously argued that there should be some form of independent body overseeing the regulatory process. This could be in an ombudsman-like role, so that complainants could escalate their complaint if the parties directly involved were not resolving the issue to their satisfaction.

“I wouldn’t mind there being a tighter control in terms of Ofcom. There’s definitely a space there that needs to be occupied in terms of what essentially is a broadcast medium... I think there needs to be some form of third party involved that you can flag these things up to. So if I’m not happy with the way a social media company has dealt with something I can flag it up to someone else.”

Male, 39, Web Officer, Cardiff

“Places like Twitter, Facebook, Instagram, YouTube kind of rely on sometimes really horrific things to be successful. You know they need awful videos to cause controversy to get people to be going mad tweeting ‘Oh my God... I can believe this has happened!’. Same with Facebook. They need this awful content. You can’t expect them to do anything about it because there’s money going in their back pocket.”

Male, 20, Student, Leeds

5.4 Some participants claimed to be consuming less news and/or news from a narrower range of sources than before

There has been a trend over the last few years towards participants consuming less news on TV. The trend appears to have continued this year.

This is, in part, a by-product of lower claimed levels of TV viewing in general (as referenced in Sections 4.1-4.3, above), which means that some participants are automatically seeing less news. For some others, downgrading their TV services has meant that they now have access to a more limited range of news channels than before. Others just choose to avoid what they considered to be a constant stream of bad news.

“I never, ever, ever, listen to the news. I’m really out of touch with it. I really should listen to it more often. I probably shouldn’t even admit to that because it’s really bad.”

Female, 26, Student, Edinburgh

“When I did have Sky I watched quite a wide range of newscasters. My viewing of news is now much more limited, and in fact I don’t seek out the news on the television.”

Male, 74, Retired, Warwick

“Part of me thinks that I should be watching the news, keeping up with what’s going on in the world, but I’m really not watching the news at all – which is sometimes a good thing because it can be a bit worrying sometimes.”

Female, 18, Gymnastics Coach, Coventry

Contrary to the trend of recent years, where our sample has consumed a growing amount of news via social media, several participants described themselves as consuming less news via social media this year. This was in part driven by suspicion and cynicism about the sources of such news content.

“News on social media is ludicrous. It’s just a nonsense. There’s no policing of it. It’s just absolutely crazy, especially in these times when people have no shame in putting forward as fact things that they know not to be accurate.”

Male, 35, currently on gardening leave, London

“I’m a bit more suspicious about what’s an actual account and what’s a bot, or if someone is just there to troll someone else. So yes, I’m a bit more sceptical about it.”

Male, 39, Web Officer, Cardiff

Conversely there was a small increase in the incidence of participants claiming to consume curated news content from apps like Apple News.

“I get the... is it the News app which you get on an iPhone? It has articles from different news outlets. I get notifications from them occasionally when something has happened, which I will occasionally go in and read.”

Female, 30, Doctor, Surrey

5.5 Fragmentation in news consumption and polarised attitudes to news providers

The decline in claimed consumption of TV news amongst our sample may also be linked to the increasingly diverse range of platforms participants claimed to use to access news. YouTube in particular was seen by some as an increasingly valuable source of news content, both from independent channels and individual user-generated content.

“Yahoo News, you go down there and see what catches you eye. If I want more in-depth then I’ll go onto YouTube. It’s like the Grenfell thing when it first came out, early days, I went on YouTube and it was full. The residents had put things on. The people that know, who are in and amongst it, post things and show films and talk. You know, that’s what I’m interested in because they’re there; they know first-hand.”

Female, 57, Casual Worker, London

A small but significant group of news consumers (around a fifth of the overall sample) claimed to be accessing websites such as Rebel Media. These individuals sometimes expressed a deep mistrust of mainstream news channels (partly fuelled by what they have seen and heard on these alternative sources).

“Rebel Media is the only site I’ll go to. You would never have known about that Huddersfield rape gang unless Rebel Media had shown it first... I think the news tells a lot of lies. I watched that interview with Tommy Robinson, and Sky News cut and copied what he said to make him look really against a kind of religion... How can you do that to someone. It’s like fake news. I don’t like things like that.”

Male, 29, Bar Manager, Bournemouth

Some others (particularly three of the most media savvy members of the sample, who are also amongst the heaviest news consumers) were generally supportive of the BBC, but were nevertheless critical of BBC News, and in particular its perceived focus on “balance”.

“I have actually spoken to other people about the quality of BBC News. It concerns me that in many what appear to be objective news stories you have to have a counter-balancing view which is a populist or, if you like, ‘Trumpian’ view... We are in danger of seeing balance as the ultimate objective, when in fact you’re obscuring the truth by seeking balance. I think that’s wrong.”

Male, 74, Retired, Warwick

“I think that they’ve got this idea of impartiality, and I think that’s good. It’s what the BBC should stand for. People should be able to trust their reporting. But I don’t think that they’ve defined what impartiality means for them, and I think in Brexit – and in what they’ve continued to do to varying degrees since – they have equated impartiality with giving two sides of an argument equal credence and an equal platform to discuss their points.”

Male, 35, currently on gardening leave, London

6. PERSONAL DATA, PRIVACY AND SECURITY

6.1 Increased awareness and sensitivity about the collection and use of their personal data

One facet of the general culture of mistrust and suspicion of the motives of technology companies described above was an increase in awareness and sensitivity amongst many participants about the collection and use of their personal data.

“The vast majority of the population – including me I suppose – don’t have a clue about what’s happening, and what information they could use... And is that bad? I don’t know. We’ve been using information for different sorts of thing for centuries. It just happens to be digital information now.”

Male, 64, Semi-retired, Pinner

Facebook’s part in the Cambridge Analytica affair (as well as a further Facebook data breach which occurred during the fieldwork period) appear to have had a lasting effect on user confidence.

“The stuff about Cambridge Analytica makes me come to the conclusion that any organisation which uses the internet... is going to collect data because they can sell it, and they’re going to analyse it, either for their own use or because they can sell it on... I was particularly concerned when I read about the data and information leak from Facebook a few days ago... I assume that because I don’t use it I’m not one of the vulnerable ones, but who knows?”

Male, 74, Retired, Warwick

As a result of such concerns, some participants described themselves being more careful about how they now share their data (e.g.) when they sign up to public wi-fi.

“I went to Frankie and Benny’s the other day and you had to put your personal information in to access the internet. I used to put my own information in and not think twice about it, date of birth, everything. Then I started thinking ‘Why do they need that?’... So I started putting in fake email addresses, fake date of birth, fake names.”

Female, 26, Student, Edinburgh

Most participants were aware of the new EU data protection legislation (GDPR) having come into effect in May. Many welcomed the opportunity (via the spate of GDPR-related requests for consent to remain on mailing lists) to “weed” their email inbox.

“It actually allowed me unsubscribe from a lot of email lists whose stuff I’d just been deleting for years – things like Groupon and Voucher Codes and things. So I get a lot less junk emails now!”

Female, 30, Doctor, Surrey

Others viewed such efforts as merely the tip of the iceberg, and suspected that the volume of data now held about them as individuals is almost unfathomable.

“I think I’ve probably got a better grasp than most because of my job, but I still think that I’d be quite shocked by the models and the profiles that those companies could set up about me.”

Male, 39, Web Officer, Cardiff

“There are probably hundreds and hundreds of companies that know a lot more about me than I think. It’s one of those things that if you thought too much about it would make you want to cry because all these companies probably share information amongst themselves as well.”

Male, 23, Tutor, London

6.2 Understanding of technology which exploits personal data is mixed

Participants' level of understanding of how their personal data is collected and used, and what the rules governing personal data are, varied enormously.

Some are relatively well informed because they have had to, for example, learn about GDPR issues at work.

“We had to make sure that our site was secure. We had to make sure that we had the cookie policy, the privacy policy, all these different policies in place to make sure that people’s data was safe, and also the way that we store data – you know, making that secure.”

Female, 41, Fundraising Manager, Cardiff

“I didn’t really know what these new rules were, so I spent a long time on the website reading through them. I was looking at templates of other people’s privacy policies and stuff, and I had to write our own.”

Female, 18, Gymnastics Coach, Coventry

At the other extreme, some had no idea what a cookie is, for example. Even those with a basic knowledge of cookies were often unaware of all the purposes served by such technology.

“[Q: Do you know what a cookie is or what it does] No... Maybe I should, because I just accept them. I’m like ‘Yep, yep, yep, yep’. Is it something like it tracks your behaviour online?”

Female, 26, Student, Edinburgh

“I’ve always wanted to ask someone what the cookies are all about, because I haven’t got a clue.”

Female, 74, Retired, Edinburgh

Whether ignorant or not, the vast majority of our sample admitted to consenting without question to cookie notices. In part this is because they assume (sometimes erroneously) that they won't be able to access the content they are interested in unless they say "yes".

"I don't know what they are, I just know that when you go on certain websites you have to accept cookies. I just click 'Accept'... I'm probably lucky I haven't been hacked into."

Female, 30, Doctor, Surrey

"They're sort of like a way of life. 'Do you accept?' Yeah, of course I do. I want to look at your website. If I say no then I can't can I, or you make it awkward for me to."

Female, 41, Fundraising Manager, Cardiff

Some expressed cynicism about content providers making it as difficult as possible to understand these purposes, in much the same way as website terms and conditions are – they feel – deliberately obfuscated.

"I don't know anyone who goes through those [privacy policies]. You know, the lawyers have been at it, but I don't think just the lawyers. It's the people who don't want you to read all that stuff."

Male, 74, Retired, Warwick

"That is one thing that I find quite frustrating. There's still, to some extent, a lack of transparency about what they're doing. But at the same time I don't personally think that advertising for products is malicious."

Male, 23, Tutor, London

ANNEX 1

Summary of participant profiles – Wave 14

Sex	Age	Job	Location	Years in study
Female	18	Gymnastics Coach	Coventry	5
Male	20	Student	Leeds	6
Male	23	Tutor	London	5
Female	26	Student	Edinburgh	11
Male	29	Bar Manager	Bournemouth	13
Female	30	Doctor	Surrey	13
Male	32	Station Assistant	Birkenhead	3
Male	35	On gardening leave	London	14
Male	39	Web officer	Cardiff	13
Female	41	Fundraising manager	Cardiff	13
Male	44	Engineer	Rural Derbyshire	14
Female	45	Stay-at-home mum	Rural Essex	13
Female	52	Housing officer	Coventry	14
Male	57	Alarm fitter	Lisburn, NI	11
Female	57	Casual worker	London	13
Male	64	Semi-retired	Pinner	13
Female	74	Retired	Edinburgh	11
Male	74	Retired	Warwick	2
Female	85	Retired	Coventry	14

ANNEX 2

Discussion Guide

General media usage

What, if anything, has changed in your household since last time we spoke and what impact that has 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 (REVIEWS, PESTER POWER)]

Which media are you using more than last year, and which are you using less? Why is this? [PROBE ON POSSIBLE INCREASED USE OF SMARTPHONE FOR GOING ONLINE – AND SPECIFICALLY THE DEGREE TO WHICH THEY MAY OR MAY NOT BE SUPPLANTING PCS/ LAPTOPS. PROBE ALSO ON REASONS FOR WHY THEY ARE USING CERTAIN MEDIA LESS.]

Challenges and frustrations

Do you have any frustrations with technology, or services? What would you like to do, but can't? Why not?

Do you ever feel like you (or other members of your family) **use media technology too much?** Which devices in particular? What kind of negative impact does this have on your life, or family life? [PROBE AS RELEVANT ON LOSS OF QUALITY TIME/ANTI-SOCIAL BEHAVIOUR/ ETC.]

Media as a learning resource

There are now lots of opportunities to use websites, forums and discussion groups, television, radio and apps to educate yourself about all different types of subject (everything from art history to computer programming to plumbing).

What, if any, experience of this do you have? [PROBE FOR DETAILS, AND SPECIFICALLY FOR THE REASONS FOR ANY RELUCTANCE TO USE ONLINE AS A LEARNING RESOURCE]

Where do/would you go to look for this kind of learning resource? [PROBE ON AWARENESS OF SPECIFIC SITES/SERVICES E.G. UDEMY, SKILLSHARE, KHAN ACADEMY, HIGHBROW, GOOGLE, YOUTUBE]

How do you decide whether the information or advice that you're viewing can be trusted or not?

How do you feel that your skills and/or knowledge have improved since using online courses/services?

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 or customer service)? [PROBE FOR DETAILS] What impact did not having access to [SERVICE] have on you? Did it make you consider switching supplier?

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

If so...

What prompted you to switch?

What was the experience of switching like?

How did you decide on which supplier to go with? Did you shop around for deals (online or otherwise)? Did you ask friends/family/other people for advice?

How easy was it to compare the different providers? And how did you do this?

Did you use a price comparison website? If so, did you realise that the most prominent results might have paid to be featured prominently?

If not...

Did you consider switching? Why (not)?

Did you investigate other suppliers? How and how far did you get?

Why did you decide to stick with your current supplier?

How do you receive your bills (i.e. online, email, paper)? Has this changed in the past year?

If you receive your bills online, what prompted you to change to this method?

Do you look at, or check, your bills (mobile, TV, etc.)? How often? Has this changed in the past year?

Television

Overview

How do you watch television now? What changes, if any, have you made to your TV services over the past 12 months, and why? *PROBE ON CONSUMPTION OF LINEAR VS ON-DEMAND TV, USE OF IPLAYER AND SIMILAR CATCH-UP SERVICES, AND ROLE OF DIFFERENT DEVICES, ESPECIALLY WATCHING ON SMARTPHONES AND TABLETS.*

Has the way in which you choose what to watch changed? [PROBE FOR ROLE OF EPG, PRINTED GUIDES, RECOMMENDATIONS, PEER PRESSURE, ETC.] How do you know when a new series or box set of a favourite programme is available?

More and more often we receive (personalised) recommendations for what to watch from apps like Netflix or iPlayer, e-mails, etc.

Do you receive these recommendations? Are you happy to receive them, or do they annoy you?

How often do you follow these recommendations? How satisfied with them are you, and are they getting more useful as time goes by?

On-demand (OTT) or streaming services

Do you currently have a subscription to an on-demand online film/video service, such as Netflix, Amazon Prime Video or NOW TV? (This could be either through an internet-connected TV set or on a mobile phone/tablet/PC). Are these household subscriptions (for the family) or personal ones?

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 and NOW 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 *THE GRAND TOUR*, *STRANGER THINGS*, *THE CROWN*, *SNEAKY PETE*, ETC.]

What other TV viewing (if any) has been replaced by these services? Do you still watch regular TV channels like BBC, ITV, Sky, etc. “live” (i.e. at the time of broadcast/scheduled times) as much as you did before?

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]

In what ways do you prefer these services to regular TV? How are they less good? Are there any aspects of regular TV that you still love?

Do these services offer good value for money? Do certain ones offer better value than others?

Have you changed your regular TV package (such as Sky) as a result of using streaming services? Would you consider doing so?

Would you consider getting rid of your TV set?

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 do you find out/choose what to watch on these channels?

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

How many high quality programmes would you say are on BBC One to Four, ITV1, Channel Four and Five nowadays? [PROBE FOR EXAMPLES]

In the context of TV programmes what does “high quality” mean to you?

Is it important to you that these channels continue to broadcast programmes like this?

How much would it bother you if the BBC didn’t exist any more? Has your view on this changed in the last year (and why)? What would you miss? [PROBE FOR DETAILS] What about ITV/Channel 4/Channel 5?

Radio and other audio content

How are you listening to radio and/or 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 DAB, DTV AND MOBILE DEVICES.]

Where and when do you most often listen [to the radio]? Do you actively listen or is it more background noise? Has this changed over the last year?

[WHERE RELEVANT] **What still motivates you specifically to listen to the radio, when there are other options available like streaming music services and podcasts?**

Do you have a paid subscription to a music service like Spotify or Apple Music?

Does having a podcast app, or a music app (e.g. Spotify) affect how much you listen to the radio? Are you happy with the content on radio, or prefer to choose your own listening?

Internet

Overview

Has the way you access the internet changed over the past 12 months? How did this come about? Has it changed the way you use the internet?

What do you use the internet (most) for? What would you say your favourite activities are when online? Has this changed over time?

Thinking about all the different websites and online services that you use (e.g. Google, Amazon, Facebook, YouTube, Twitter, Netflix, BBC online, Skype), which would you say are the (up to) three most important to you? Has this changed at all in the last 12 months?

[FOR EACH ONE] Why are they so important, and what do you mostly use them for?

Would you say you are using more or fewer websites and online services 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?

[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?

Proactive use of the internet

What was the last thing you posted (or shared) online? What prompted you to do so?

Do you post (or share content) more or less than you did last year? Why?

Social media

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

How often do you look at social media? Do you look at certain ones more than others? Why is this?

What is the role of each? How do they fit together (if at all)?

Messaging apps

Do you use any of the instant messaging apps (e.g. WhatsApp, Facebook Messenger, Snapchat)? Has your usage of them changed in the past year?

Have you found that your use of texts has decreased a result? Do you send mainly images or text on these apps?

Which is your primary way of messaging people (or do you use different ones for different people?

Have you experienced any issues with unpleasant or inappropriate messages being sent through these apps?

Online etiquette

When you're communicating/posting/sharing online now, do you behave any differently to the way you would in the 'real' world? Why is this? How does your behaviour differ between (e.g.) e-mail, social media, and posting on a public forum?

Do you always post under your own name, or are there circumstances in which you're posting your thoughts online under an alias? Do you act differently depending on whether you are posting under your own name or under an alias?

What are the pros and cons of being able to be post anonymously? [IF THEY FOCUS ON NEGATIVES, PROBE TO SEE IF THERE ARE ANY POSITIVES]

User-generated content

Do you ever watch 'user-generated' videos (e.g. on YouTube), for example vlogs, 'how-to' videos, product reviews and 'un-boxing' videos? How often do you watch these? Has this changed since last year?

How has this impacted the time you spend consuming other kinds of media? Do you watch these videos instead of (for example) watching TV, reading books/magazines, or something else?

Have you ever created this kind of video? [PROBE FOR DETAILS] If not, what's stopping you?

Trust and the internet

How much do you trust what you see and hear over the internet? More or less than last time we spoke? Why?

Have you encountered any issues to do with the reliability of information you have found online in the last year? [PROBE FOR DETAILS.] **What, if any, lessons did you learn?**

eDemocracy

Have you used the internet to access information about (local) government and public services (e.g. refuse collections, schools, NHS Direct), and/or to contact (local) government in the past year? [PROBE FOR GOOD AND BAD EXPERIENCES.] Has this changed since last year?

Harmful/hateful and inappropriate online content

People sometimes talk about "harmful or hateful material" online. What do you think that means? [PROBE FOR DETAILS]

Do you ever see harmful or hateful material or bullying online (either aimed at yourself or someone else)?

[IF YES] **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?**

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

[IF NO] **Would you know what to do if you were to see hateful content online** (e.g. ignore it / report it / respond to it / make a comment / unfriend that person, etc.)?

Are there any other forms of online content you would consider to be “inappropriate”?
[PROBE FOR DETAILS]

Do you (or members of your family) **ever see content** (that you didn't mean to access) **online that might be described as “inappropriate” in terms of sexual or violent material or bad language** [OR ANY OTHER FORMS OF INAPPROPRIATE CONTENT DESCRIBED BY RESPONDENT]?

[IF YES] **What do you do when you see it** (e.g. ignore it / report it /block it)?

Does it worry you that the content has appeared on your device when you didn't choose it?

Do you view it as an invasion of your privacy, or do you just accept it as part and parcel of the internet?

[IF NO] **Would you know what to do if you were to see inappropriate content online** (e.g. ignore it / report it /block it)?

Regulation of the internet

To what extent are you aware of any regulation of content which appears on the internet (in the way that – for example – content is regulated on TV for taste and decency, honesty and factual accuracy)? [PROBE FOR AWARENESS/EXPERIENCE OF ANY INTERVENTIONS ON THE PART OF PLATFORMS AND INTERMEDIARIES – E.G. FACEBOOK, YOUTUBE – AND/OR OTHER ORGANISATIONS – E.G. ISPs, GOVERNMENT, OFCOM.]

Would it be a good thing if there was more regulation of content which appears on the internet?

What do you think the benefits of this would be? Might there be some downsides?

Which bits of the internet should and shouldn't be regulated? What kind of rules do you think should be in place (assuming they could be enforced)?

Who do you think would be capable of enforcing such rules?

To what extent should content creators (the people and organisations who publish websites, post articles on social media, upload videos to YouTube, etc.) **be free to publish what they like online, or do they have a responsibility to adhere to certain standards?**

Does this differ at all depending on whether the content creator is an individual or an organisation?

Could or should internet companies like YouTube and Facebook have any responsibility for the content which users post on their platforms? [PROBE FOR DETAILS]

To what extent should the responsibility fall to the consumer to protect him/herself and his/her family online?

Are there sufficient and appropriate tools available for them to do so?

Should we feel a duty to help protect others by reporting content we come across which we consider to be inappropriate?

Privacy and Security

Personal data: trust

What concerns, if any, do you have about giving your personal data to websites or apps?

Have you had any bad experiences as a result of giving your personal information to (e.g.) a website?

Are you more reluctant to share certain types of personal data (e.g. phone number) than others (e.g. email address)?

Does your attitude/approach to sharing your personal data vary depending on what type of site you are visiting (e.g. shopping sites vs banks vs government sites)? Do you (for example) give real data to some, but false data to others? If so, how do you decide?

How much information do you make public on your social media profiles?

Use and control of personal data

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?

If you wanted to change or delete your personal data from a website or mailing list, would you know how to do so?

When was the last time you unsubscribed to a mailing list or deleted your account from a website?

Were you aware of new legislation (GDPR) coming into force in May of this year which required many businesses to get fresh consent from people to being on their mailing lists?

How did you respond to such requests?

Cookies and cookie notifications

Do you know what a “cookie” is?

Have you noticed an increase in the number of cookie alerts appearing on websites that you visit?

When you see a cookie alert on a website do you just click on “accept” or do you sometimes edit your cookie preferences? (If so, when and why?)

Have you noticed that some websites offer you a one-click option to disable all cookies. Is this a good idea? Does this make any difference to how you respond?

Targeted online advertising

How do you feel about websites tracking your browsing behaviour so that they can target more relevant content and advertising at you?

Are you aware of social media sites such as Facebook and Instagram serving up targeted advertising to you based on other content you view and respond to? Is this a good or a bad thing?

Were you aware that you agreed to this when you accepted Facebook/Instagram's terms and conditions when you registered for the site?

Does this give you any concerns about what else you may have inadvertently agreed to when ticking "I agree"?

Facebook data breach (follow up for those who participated in Skype interviews)

When sent us your video message earlier in the year in reaction to data breaches at Facebook, you said that... [COMPLETE AS RELEVANT].

Is this still how you feel? If not, what has changed?

Are you using Facebook the same, less or more than you did before?

Privacy and security: general

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?

Mobile

Overview

What kind of mobile phone do you have? What do you use it for?

Have you changed your phone in the last year? How did you choose the new one? PROBE ON FEATURES VS COST VS OTHER FACTORS. IF NOT A 'TOP-OF-THE-RANGE' HANDSET, WHY NOT?

Have you changed network (or package) in the past year? How did you choose your network/package?

Has the way in which you use your phone changed in the past year? [PROBE ON CHANGES IN THE RESPECTIVE USE OF CALLS/TEXTS/INTERNET, AND THE USE OF SMARTPHONES FOR CONSUMING AUDIO AND VIDEO CONTENT.]

Mobile internet data use

How closely do you monitor your data usage these days? How? Has this changed in the past year?

What steps (if any) do you now take to minimise your data usage (e.g. stop apps from updating in the background, switch off mobile data and use wi-fi where possible)?

Have you experienced problems with your data allowance running out in the past year?

How did you react to this? **Have you had any unexpected data charges?** [PROBE FOR DETAILS]

News

How are you accessing news these days? How has this changed at all in the past year? How about compared to five years ago?

To what extent do you actively seek out news, as opposed to it being served up to you within the media you're already consuming? [PROBE FOR BOTH ONLINE AND OFFLINE E.G. TV NEWS]

Which are your go-to 'brands' for news now? Does this vary for different kinds of news, and/or the different ways you access news (i.e. would you choose a different brand for news online compared to on TV/radio)?

Do you use any of the newspaper websites/apps (e.g. Mail Online, Guardian, Sun, Telegraph, etc.)? Are these the same newspapers that you read in paper format?

Do you have different expectations of different news brands? So would you judge [BRAND A] by different standards to [BRAND B], or do you judge them all by the same standards? And what are those standards?

How much do you look at sources of news which are not the mainstream brands like the BBC or the national newspapers (e.g. **Huffington Post, Vice, Russia Today, Al Jazeera**)? Are you more aware of these than you were a year ago?

Why do (don't) you look at these sources? Is it as a replacement for the mainstream news sources, or as an alternative view?

Do you use social media like Twitter or Facebook for news? *PROBE: IF SO, WHICH TYPES OF NEWS IN PARTICULAR (SPORTS ETC.)?*

Do you specifically go to Facebook/Twitter for news, or do you happen to come across news there when you are looking for other things (e.g. friends' status updates, etc.)?

Are the social media platforms themselves (e.g Facebook, Twitter) **the source of the news you see, or does the news come from other sources?** How closely do you look at the source?

Do you read news articles that appear in your news feed in full, do you just skim the headlines (or look at the pictures) or a mix of both? [PROBE FOR DETAILS]

Do you ever read the comments below the article? Do you ever comment yourself? [PROBE FOR DETAILS]

Do you 'like' or follow any news brands, or do you get the news links from other people's posts?

Do you trust any, some or all of the news you see on social media? [PROBE FOR DETAILS.]

Are you more or less trusting of the major news brands these days? Why?

Is trust more important when it comes to certain type of news than it is for others? Do you go to different sources for news about things where trust is more important?

There has been a lot of talk about "fake news" in the past year or so. **Have you seen anything you would consider to be "fake news"?** If so, how did it make you feel and how did you react?

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