ADULTS' MEDIA LIVES WAVE 15: 2020

A report for Ofcom
June 2020

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1. INTRODUCTION TO THE STUDY

Ofcom's Adults' Media Lives study was set up in 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 15-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.

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 lifestage 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 catalysts to changes in participants' relationship with media. These experiences often create new needs, or give people an added incentive to develop new skills, but also sometimes create barriers to getting the most out of the opportunities presented by digital media. Elsewhere change has been slower, especially among some older participants.

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. Fifteen waves of research have now been conducted; the first was in February 2005, with all the subsequent waves around October.

The most recent interviews were conducted between 27th September and 1st November 2019 by Mark Ellis and Tony Harbron of The Knowledge Agency. This was before the Covid-19 pandemic hit the UK. To understand more about the impact of lockdown on our participants we conducted follow-up online interviews with a subset of the sample during the early-lockdown period. A summary of findings from these additional interviews can be found in Annex 1.

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. Three of the 19 participants in the latest round of interviews have been part of the study since the start (2005), and seven more joined in 2006. 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.

Certain subjects have been tracked consistently each year; many of these have been subject to great change over the fifteen years of the study, 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);

- Use of mobile devices to consume content;

- Sources of knowledge and information about media;

- 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 topical and/or emerging issues each year. For example, in the latest interviews, understanding of changes to the BBC's on-demand services (BBC iPlayer and BBC Sounds) and experience of using news aggregator apps such as Apple News.

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 over 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 2020 wave include:

Living with technology (Section 3)

- Lifestage and domestic circumstances still heavily influence device and service choices. Financial concerns were a particular issue in this wave for some participants, who have had to do without some services, or wait longer to upgrade their hardware.

- We have seen an increase in the reported level of ownership of connected devices (such as Google Home and Amazon Echo), and usage of various forms of voice activation technology (Siri, Alexa, etc.). This is a significant change compared to previous years, although usage of such technology is still at the novelty stage for most participants.

- Around a quarter of the sample (covering a broad mix of age groups) described themselves as now using their smartphone to monitor their health and/or fitness activity. Interest in wearable technology has grown, but ownership of devices is still low.

- Participants are less likely than previously to upgrade to the latest model of mobile handset. Prices were felt by many to be prohibitive, and participants argued that the benefits of new and improved handsets over older models are now only marginal. Were it not for much-reduced battery life on their current handsets (a common complaint across the sample) many would not have upgraded at all.

- Most participants have stuck with their current broadband, landline and TV providers, at least in part through inertia. A few had contacted their provider when they knew that they had the opportunity to switch and successfully negotiated a better deal.

TV, radio and streaming services (Section 4)

- The majority of our sample now have access to at least one paid-for streaming video on-demand service. Participants also reported more viewing on mobile devices than in previous years. This included viewing both in and out of home, and a mix of streaming content and downloads.

- Participants described themselves watching less "regular" or "traditional" TV, and around a quarter of our sample claimed to have no TV set in the household connected to a traditional TV service. Reasons cited for the move away from regular TV included a loss of interest in soaps and mainstream entertainment programmes, which were criticised for lack of innovation, even by some of their core audience.

- Over the past five years participants have been increasingly likely to describe their favourite programmes as being dramas rather than programmes from other genres, productions originating from overseas rather than the UK, and consumed via a paid-for streaming video on-demand service, even where also shown on a mainstream channel. Examples mentioned in this wave included *Chernobyl*, *Big Little Lies*, *Succession* and *Stranger Things*.

- Participants' relationship with PSB is changing. Several claimed never to watch ITV/ BBC/C4/Five, and three no longer have a TV licence. For those who did still claim to watch content from the PSB channels the BBC iPlayer (and, to a lesser extent, ITV Hub and All 4) is becoming a more important part of how they access this. More participants are using it, and it is used more often by those who do so.

- Some participants claimed to be listening to less radio than in previous waves. Changes in circumstances (e.g. less driving) mean that, for some, radio listening occasions have reduced. Others described having more listening options available to them (e.g. Spotify, Apple Music, YouTube, podcasts) more often, because of their increased ability to connect devices to smart speakers and/or car audio via Bluetooth. Just under half the sample now claim to listen to podcasts.

Websites, apps and online content (Section 5)

- Participants are living an increasingly "connected" lifestyle facilitated by the internet, mobile devices and apps. Examples include interaction with educational institutions, healthcare, job hunting, shopping, gambling, banking and – of course – keeping in touch with family and friends.

- 15 out of 19 participants now use YouTube at least occasionally. It serves a variety of purposes for different individuals – music streaming service, podcast platform, search engine, news service, TV platform, sports highlights channel, etc.

- Participants claimed to weigh up various factors when deciding whether or not to trust online content. Awareness, knowledge or – ideally – previous experience of the site or source was perhaps the most important. Other factors mentioned included production

values, the number and nature of comments made on an article or video, the number of similar search results, and the number and quality of ratings and reviews (where relevant).

- Direct experience of online harm continues to be relatively rare in our sample, but two participants described incidents in the past year where they had been victims of unwanted attention online, and around half the sample claimed to have witnessed some form of harmful/hateful content. Most participants' first instinct is to ignore or block, rather than report, but many would be more inclined to report attacks on a vulnerable individual such as Greta Thunberg.

Social media and messaging apps (Section 6)

- Some participants claimed to use Facebook less than previously, but many are increasingly active on other Facebook-owned platforms such as Messenger, Instagram and WhatsApp.

- Messaging apps have become an almost ubiquitous tool across the sample. WhatsApp is the most popular (used by all), but Messenger is also widely used. Family and friendship WhatsApp groups are now important communication channels. There were also many examples cited of event-specific groups.

Personal data, privacy and security (Section 7)

- Participants voiced growing concerns about technology "spying" on them. Examples included smart speakers listening in to their conversations, the use of facial recognition software either on devices and/or in public places, and the ability of major organisations like Facebook and Google to link and mine data sets from multiple sources. Several participants had watched the Netflix documentary *The Great Hack* and this had left a lasting impression on them.

- Notwithstanding these concerns, most participants continue to accept cookies, terms and conditions and privacy policies without question. Sometimes they justify this by arguing that they have no choice but to accept them, that they assume that such terms and conditions are standardised across sites (so there is no need to read them each time) or that they are not important enough individuals for the companies in question to have any interest in their data.

- Across the sample there were widespread reports in this wave of participants being targeted by increasingly sophisticated phishing attempts (variously via email, text, phone and even post). None had fallen prey to any of these attempts, but there had been a number of close calls.

News (Section 8)

- In terms of news sources, the BBC remains a key reference point for many participants, and the source to which they would turn first in a crisis. But around half the sample were critical of BBC News in some way – usually in relation to its coverage of UK politics and the Brexit debate (in particular).

- Participants claimed to access an increasingly eclectic range of sources from across the world, via a mix of social media, apps, websites, podcasts, TV and radio. Their judgement of the trustworthiness of a news source or story tends to be heavily influenced by the degree to which it reflects their existing attitudes. Even those who claimed to access a range of views often seek those views from like-minded sources.

- In this wave we witnessed more numerous and extreme examples of polarisation in participants' attitudes to news than in previous years: between those who want a lot of news and those who don't want any; between those who value getting their news as quickly as possible and those who prefer it summarised and carefully considered; and between those who want their news to appear unmediated and those who claim to prize commentary, analysis and opinion.

3. LIVING WITH TECHNOLOGY

3.1 Lifestage and domestic circumstances still heavily influence device and service choices

A recurring theme in our interviews since 2005 is that changes in lifestage and domestic circumstances (e.g. going to university, entering or leaving the world of work, having children or the breakdown of a marriage) can have a major impact on participants' ability to own devices and access services, and on their motivation to acquire new skills.

In this wave of interviews financial concerns were a particular issue for some participants. One is currently out of work and has therefore decided to postpone the process of taking on new mobile handsets for him and his wife for as long as possible. When he does upgrade, price will be a key factor in his decision-making process.

"We're thinking of changing to get more data and that sort of thing, but we're going to have to see what the prices are like. We're talking about changing next year because we find sometimes they aren't holding a charge so we think the phone's on the way out."
M, 58, Unemployed, Lisburn NI

Another participant has entered into an IVA (Individual Voluntary Arrangement) as a result of running up large personal debts. One condition of the agreement was that she had to cancel her TV, mobile and broadband package with Sky.

"I could have gone to Carphone Warehouse and they would have done me a deal, but I'm not allowed to take anything else out because of going bankrupt – or whatever the thing is that I've done. I can't take anything else out."
F, 46, Stay-at-home Mum, Rural Essex

Some other participants are less financially constrained but have other domestic priorities such as young children.

"What we want – as in technology – costs more and we have to weigh it up. Do we need that right now or do the kids come first? Unfortunately, the kids do come first, our toys can always come after."
M, 33, Station Assistant, Birkenhead

On the other hand, two of our younger participants are entering the world of work for the first time, and now find themselves to be cash-rich and time-poor compared to their previous existence as students. Their attitudes to new hardware and services are quite different.

"I've no problem with my phone whatsoever. I get the use out of it that I want. I can access everything I need. The battery life's fine. The only real reason to upgrade is luxury… why not?"
M, 20, Odds Trader, Leeds

3.2 Increased uptake of connected devices and voice activation technology

In this wave we saw an increase in the reported level of ownership of connected devices (such as Google Home and Amazon Echo), and usage of various forms of voice activation technology (Siri, Alexa, etc.). This is a significant change compared to previous waves.

Just under half of the sample now claim to own a smart speaker, though not all of them are wholly convinced that using these will form part of their long-term media behaviour.

"Because we don't have a TV we were both sat here doing a bit of work and we were getting the rugby scores through from Alexa every ten-to-fifteen minutes. We've just been playing about with her at the moment, so you can say 'Alexa tell me a joke' and she'll tell you a joke."
F, 31, Doctor, London

As well as communicating with smart speakers, voice activation is also being used by some participants for communicating with their smartphones (especially on occasions when their hands are otherwise occupied, e.g. cooking, washing up or driving), and remote controls.

"I've started using Siri just so things are easier. For example I was working from home and I was working on my laptop in the living room and I had eggs on the cooker, so I said 'Set a timer for five minutes' rather than having to go in and find the app. It makes it a lot easier."
F, 27, Trainee Solicitor, Edinburgh

3.3 Increased interest in applications of technology to monitor and improve health

Unlike smart speakers, the penetration of wearable technology in our sample remains low (one participant owns a Fitbit and another an Apple Watch), although two others claimed that they intended to buy something similar in the coming year.

"I like my health app because it tracks my steps when I've got my phone on me. Actually it's made me want to get a Fitbit or something like that."
F, 19, Student, Loughborough

More significantly, around a quarter of the sample (covering a broad mix of age groups) described themselves as now using their smartphone to monitor their health and/or fitness activity.

"I must have been bored one day and I wondered what the heart was on my phone. I pressed it and it told me how many steps I'd walked. So I've started to carry my mobile phone around more to see if I can get up to the ten thousand steps a day."
F, 53, Housing Officer, Coventry

3.4 Participants are less likely than before to upgrade to the latest model of mobile handset

Almost half the sample had changed mobile handset since the previous year's interviews. However, most upgrades have been to models that are not top-of-the-range. This contrasts with earlier years of the study when (for a significant minority at least) the arrival of a new model of iPhone – for example – was a noteworthy event and often a trigger to them upgrading their handset.

The price of the leading handsets these days was felt by many to be prohibitive, but participants also argued that the benefits of new and improved handsets over older models are now only marginal.

"In terms of having really up to date hardware, I just don't really care as much any more. I think an example would be my phone: I came to the end of my two-year contract and I just didn't feel the need to upgrade to the newest, funkiest version. There are things that I like my phone to do and I like it to do them reasonably well, but most of those things don't require a £1,200 phone."
M, 36, Financial Services Exec, London

"The screen was smashed so I needed a new one, I knew I wanted an iPhone because I've never had anything else, I really like them. It was between the XS and the XR and I couldn't really tell the difference, and one was a lot cheaper so I went with that."
F, 31, Doctor, London

"I got the iPhone 8, which is one up from the one I had. The iPhone 11 had just come out so I thought 'Do I want this?'. And we looked into it and the amount of money you pay a month plus the upfront cost as well made me think 'No. It doesn't make sense.'"
M, 33, Station Assistant, Birkenhead

In fact, were it not for much-reduced battery life on their current handsets (a common complaint across the sample) many would not have upgraded at all.

All bar one participant (who received a special offer as a new student) have stayed with their current mobile provider. Several of those who have retained their old handset have changed to cheaper sim-only deals.

Most participants claimed to be well informed about the status of their mobile contract. Because it tends to be a limited fixed-term arrangement, some just know when the initial contract period is up. Others described receiving various forms of notification from their provider via text, email or as part of their bill.

"I'm with O2 and the contract's finished in January so then I can make the decision whether I want a new one or stick with it. They've got a really good app that sends reminders, like texts, and they send emails to say your bill is ready for you to check. So when I check that it tells me all the information I need to know on the app."
F, 27, Trainee Solicitor, Edinburgh

3.5 Most participants are sticking with their current broadband, landline and TV providers

Compared to their mobile contract status, participants' knowledge of their current broadband and landline contract status was more sketchy. Only one participant had changed broadband provider (voluntarily) in the previous year (although two others changed as a result of moving home). He is a keen amateur photographer and was extremely frustrated with the upload speed of his former provider.

"I've just changed the provider of my internet service. Because I've been on this recent trip to Africa and I've been producing books from that, I have to upload stuff and the upload speed is so pathetically slow. So I'm getting fibre this time."
M, 75, Retired, Warwick

Some other participants voiced mild discontent with their current service and/or deal (intermittent and/or inconsistent broadband speed was a particular bugbear), but blamed inertia for a lack of action.

"I just know it says 'Signal strength: medium'. It's never said the signal is at full strength, it's always medium or weak so I know it's not brilliant… I think if I wanted to leave I could leave because the only things I have with them are the landline and the broadband… It's like 'better the devil you know'. I know what the bill's going to be, it's not really changed ever since I've been with them."
F, 58, Unemployed, London

"I think the reality is I'm overpaying for what I get but there's a bit of inertia I think. I need to get off my backside and do something because I know I'm overpaying."
M, 65, Semi-retired, Pinner

A few had contacted their broadband provider when they knew that they had the opportunity to switch and had successfully negotiated a better deal.

"When it was due to be renewed, instead of pressing 1 to renew, we pressed 2 – instead of automatically renewing – to see whether we could get a better deal without going through looking for better deals with other companies. They did slightly reduce it; not by a lot but they did give us a few extras, like the phone was added on to it, the different films were added on."
F, 53, Housing Officer, Coventry

In many cases, participants' TV packages are bundled with their broadband. Those who subscribe to premium channels (movies and sports) are generally well aware of what they're subscribed to and how much it costs them. Others tend to be less aware.

One participant voiced particular frustration that the complexity of different bundles and packages means that it can sometimes work out more expensive to downgrade TV packages and bundles.

"My TV package is a bit too comprehensive at the moment. I don't use all of this stuff that I'm paying for so I called them and asked if I could downgrade my package. They said I could do it but it would be more than my current package."
M, 36, Financial Services Exec, London

Some others voiced frustration that they felt the onus is on the customer to get the best deal possible from their current provider (mobile, broadband or TV).

"I think it's terrible that a lot of companies will offer new customers all these fantastic deals to hook them in, yet the existing customers are left paying sixty, seventy pounds a month. It's not consistent or fair. I know it's a loss leader for them to attract customers but they should throw existing customers a bone every now and then."
F, 42, Fundraising Manager, Cardiff

4. TV, RADIO AND STREAMING SERVICES

4.1 The use of paid-for streaming services such as Netflix has increased in this wave, as has viewing on mobile devices

The majority of our sample (16/19) now have access to at least one paid-for streaming video on-demand service. Netflix is the most common. 15 out of 19 participants have access to this via their own or a family member or friend's subscription. Four participants claimed to have access to Amazon Prime Video and three to Now TV. This represents an increased incidence of all these services compared to previous years, and forms part of a long-term trend towards increasing fragmentation and personalisation of participants' viewing behaviour.

Participants also reported more viewing on mobile devices than in previous years. This included viewing both in and out of home, and a mix of streaming content and downloads.

"When I'm getting ready I've got a dressing room and there's no telly in there so I just use my phone as a TV."
F, 27, Trainee Solicitor, Edinburgh

"On the weekend [daughter] had a friend sleep over. We've got the Amazon Prime Video app on the iPad, so I purchased a film for them and they watched Aladdin together when they were upstairs, on the iPad."
F, 42, Fundraising Manager, Cardiff

"We were coming back on Sunday night from being away and we had downloaded something on iPlayer so we watched it on the laptop on the way home. Just this week, for the very first time, I started watching stuff on my phone on my commute."
M, 36, Financial Services Exec, London

"I've watched things on my phone so when I'm going to London or Edinburgh, I'll either download a couple of episodes or, if there's wifi available I'll sign into the wifi and I'll watch something on my phone."
F, 42, Fundraising Manager, Cardiff

Around half the sample now claim to have smart TV sets. Several others have the ability to access web-based apps on their TV via devices such as Amazon Fire Sticks. This, combined with the availability of Netflix etc. on TV platforms such as Sky and Virgin, means that most households in our sample have multiple access routes to streaming services on their main TV set.

In these circumstances the easiest/quickest app available tends to be most used, and this is starting to have an impact on viewing choices.

"We use the Smart TV one because it's on the remote so it's faster to get into and you don't have to sign in. You don't have to choose three options to get to it."
F, 27, Trainee Solicitor, Edinburgh

"Say, for example, you go on Netflix or iPlayer or any of those apps to watch catch up. It takes ages… you get the blue circle of death – as we call it. Whereas if you watch it through the Amazon Fire Stick it works straight away and you get the trailers and things like that; it's much better, it's faster. So we find we're bypassing that [cable box] and we've actually downgraded our package to the minimum because we've been watching much more – even iPlayer – through the Amazon stick."
F, 42, Fundraising Manager, Cardiff

4.2 Decline in perceived importance of "regular TV"

As access to streaming services continues to grow, participants described themselves watching less "regular" or "traditional" TV. (This is how they tended to describe viewing of linear channels such as BBC One, ITV1, Channel 4, etc.)

This manifested itself in a number of different ways. First, a few participants claimed to be viewing less TV overall.

"The TV… we don't watch as much as we used to."
F, 46, Stay-at-home Mum, Rural Essex

"I'm probably watching less, in terms of bingeing on series."
M, 40, Web Officer, Cardiff

Secondly we witnessed an increase in participants claiming to have no TV set in the household connected to a traditional TV service (e.g. Freeview, Sky, Virgin). Five

participants fitted this profile. These people claimed that their viewing needs were satisfied by streaming services alone.

"We still don't have a TV, I'm still mostly using my phone and my MacBook."
F, 31, Doctor, London

"Whenever you go on and look at HDMI1 that'll be on the Fire Stick but then if you try and go on live TV it doesn't work because it's not linked up… but there's nothing really on live TV we'd be looking to watch anyway."
F, 19, Student, Belfast

"I think all three of us in the house have Netflix or Amazon Prime or one of the others. I wouldn't even know how to get channels on there."
M, 23, Tutor, London

Reasons cited for the move away from regular TV included a decline in interest in – and perceived importance of – soaps and mainstream entertainment programmes. Even the more traditional TV viewer types within the sample now say these are less important to them, and were critical of what they perceived as a lack of innovation in these genres.

"I'm not even into the soaps as much now. Every time I put the soaps on it's something depressing – someone's dying. They all copy each other, they all have the same storyline."
F, 58, Unemployed, London

"Coronation Street, Emmerdale, EastEnders, they're all doing the same kind of storylines in some shape or form. You're watching the same thing over and over again with different characters. We don't watch it any more."
M, 33, Station Assistant, Birkenhead

"We used to really look forward to watching I'm a Celebrity, The X Factor and Britain's Got Talent but I suppose they've become boring now."
F, 53, Housing Officer, Coventry

"When something becomes successful everyone copies it and, before you know it, all of television is like The Only Way is Essex."
F, 58, Unemployed, London

4.3 Most participants' viewing highlights were drama programmes consumed via a streaming service

Over the past five years participants have been increasingly likely to describe their favourite programmes as being dramas rather than programmes from other genres, productions originating from overseas rather than the UK, and consumed via a paid-for streaming video on-demand service, rather than a mainstream channel.

Having said this, the previous wave of interviews was notable for the number of drama programmes broadcast by the BBC and ITV which were singled out for particular praise – including *Bodyguard*, *Killing Eve*, *Doctor Foster* and *Liar*.

In this wave – in line with the longer-term trend – most of the enthusiasm towards specific programmes expressed by our participants was focused on content from streaming services. (This includes some programmes that were also broadcast on Sky but were consumed by the respondents in question on Now TV.) Examples included *Chernobyl*, *Big Little Lies*, *Succession* and *Stranger Things*.

"There's a series called The Sinner that comes on around every Autumn on Netflix. I think they've done it for two years and I've binged watched it in a weekend. There's another one called Big Little Lies which was on Amazon Prime Video which they've done two series of."
F, 31, Doctor, London

"My current favourite is Succession on Now TV… that has kind of been under the radar."
M, 36, Financial Services Exec, London

Some of the programmes cited as being highlights on the streaming services were originally broadcast on mainstream channels, but this was not necessarily clear to our participants, and the original content creators were often not credited.

"We do watch some Netflix based series as well. The Last Kingdom. And then there's some Netflix films that we've watched so they're not all terrestrial based programmes."
F, 42, Fundraising Manager, Cardiff

As streaming services become ever-more popular, programmes accessed via those services are even becoming "water cooler TV" – the programmes participants feel they have to see to be part of the conversation (e.g. at work).

"It's really good having these series that you can catch up on. Dexter, I didn't watch it back then, I've watched them all and I was missing out. Now when people make Dexter jokes I know what they're talking about."
M, 33, Station Assistant, Birkenhead

"We certainly have talked about Chernobyl on WhatsApp with my friends; people talk about it at work if it's a big series like that."
F, 31, Doctor, London

Inspiration to view comes from an eclectic range of sources: newsletters and articles, EPG and printed guides, in-app suggestions and word-of-mouth were all mentioned.

"The recommendations by word of mouth from other people that I get are typically from my mum and dad who sit down every night and watch telly. They watch really good things that I would enjoy as well. My friends also recommend stuff because they're into the same sort of programmes as me."
F, 27, Trainee Solicitor, Edinburgh

"I actually go and read about it. So I'll find out different people's recommendations online and [from] publications that you trust – trust in terms of their opinion being similar to what I'd normally like… There are so many places putting out lists of the best thing to watch for all the different providers this month."
M, 36, Financial Services Exec, London

4.4 Viewers' relationship with PSB is changing

Several participants claimed never to watch ITV/BBC/C4/Five, and several others don't have access. Three participants reported that they no longer have a TV licence, and a few others claimed to be considering not getting one in future. This is the first time we have heard participants openly admitting this.

"I do understand it's probably important to support a national institution like the BBC but, at the same time, we're just not using any of their services."
M, 23, Tutor, London

"I would never really watch ITV, I can't remember the last time I watched BBC."
F, 31, Doctor, London

"Yeah, we got the letter about the TV licence and I just said: we don't need one because we just don't watch live TV and now most of the excellent programmes on BBC iPlayer are also on Netflix as well."
M, 23, Tutor, London

"Since coming away from the fixed television, I've got less and less happy about paying it… There's an element of me that resents having to pay it on the iPad."
M, 65, Semi-retired, Pinner

When participants did claim to engage with PSB channels, this was most often through news and/or major drama productions (such as *A Confession*, or *Killing Eve*). However, we did not see the same high level of engagement with PSB dramas as we witnessed in the last wave.

"Every so often there's a really good series on. Last year it was Bodyguard and that sparked me to pay more attention to those channels and made me think if that was on there might be other good things on. This year I'm currently watching Confessions [sic]."
M, 20, Odds Trader, Leeds

"Probably the biggest one in this household was Killing Eve. You could hear a pin drop in the whole house when that was on. Everybody seemed to like it."
F, 53, Housing Officer, Coventry

For those who did still claim to watch content from the PSB channels the BBC iPlayer (and, to a lesser extent, ITV Hub and All 4) are becoming a more important part of how they access this. More people are using it, and it is used more often by those who do so.

"I've recently watched Killing Eve and The Bodyguard on BBC iPlayer and they were really good. I didn't have a TV in Coventry and I don't have a TV now so the only way I can watch it is on iPlayer."
F, 19, Student, Loughborough

"Sometimes I like some of the archives they have on it, I watched something the other day… it was about a boxer from Wales."
M, 58, Unemployed, Lisburn NI

"We've been binge-watching a lot of stuff lately. Peaky Blinders, for example, it's on the fifth series now and we'd never watched it and we ended up catching up on four series and watching the fifth series… in five weeks."
F, 42, Fundraising Manager, Cardiff

In the past year the BBC changed its rules on the availability of programmes on the BBC iPlayer – extending this from 28 days to up to a year. Some participants welcomed the longer availability of programming on the BBC iPlayer (though many hadn't noticed any change).

"It feels like stuff's on there for longer. I don't know that for certain but going back to watch Peaky Blinders it felt like the [expiry] date that they were displaying was quite a long way away… We've been stung because Handmaid's Tale was on Channel 4. We didn't watch it in real time and then they only kept it on there for thirty days. We went to start watching it but we could only watch from episode four onwards so we looked for it elsewhere and it was only on Amazon Prime for twenty-five quid."
M, 36, Financial Services Exec, London

4.5 Consumption of podcasts and other streaming audio content is growing in part at the expense of radio

Some participants claimed to be listening to less radio than in previous waves. Changes in circumstances (e.g. less driving) mean that, for some, radio listening occasions have reduced.

"Because I was driving to work I was listening to the radio a lot on my commute. I'm not listening to radio at all any more."
F, 31, Doctor, London

"When I used to drive loads I would always listen to the radio and I quite enjoyed it, but now I get the bus everywhere I never listen to the radio at all… When I'm in my car I'll listen to Spotify."
F, 27, Trainee Solicitor, Edinburgh

Participants also described having more listening options available to them (e.g. Spotify, Apple Music, YouTube, podcasts) more often, because of their increased ability to connect devices to smart speakers and/or car audio via Bluetooth.

"I can request certain types of music, certain genres and certain stations via the Amazon Echo, or I can find any song I want via Apple Music. But my wife still insists on having things like Heart or Smooth radio in the car; she even requests it on the Amazon Echo."
M, 40, Web Officer, Cardiff

"In the car if I plug it [smartphone] in on the Bluetooth or with the USB lead, iTunes always pops up first but I'll switch it over to Amazon Music because that's where my subscription is."
F, 42, Fundraising Manager, Cardiff

Just under half the sample now claim to listen to podcasts. This is a significant increase over previous years.

"I like being able to choose what I'm listening to and I feel like, with podcasts, if you don't like something you find something else. But with the radio you have no choice you have to listen to something you may not be that interested in."
F, 27, Trainee Solicitor, Edinburgh

More often than not, the podcasts cited by our participants as examples were specialist and/or independent productions, as opposed to catch-up listening to radio shows or those podcasts being produced by major broadcasters. Awareness and claimed usage of the BBC Sounds app was low.

"The thing about podcasts is the freedom to discuss whatever you want – whether it be trivial and comedic or really heavy subject matter – and not having your hands tied in those discussions. Invariably, most of that benefit is exercised when you don't belong to a large corporation that has to have greater consideration over those things. Independent voices are the more interesting ones because they can speak about things in a more interesting way, but also they don't have to justify how commercial a proposition it is. I could speak about socks for two hours a month with my best mate. BBC are never going to get funding for that but somebody might be interested in it. So you get perspectives and subcultures that some people are going to find really interesting."

M, 36, Financial Services Exec, London

5. WEBSITES, APPS AND ONLINE CONTENT

5.1 Participants are living an increasingly "connected" lifestyle facilitated by the internet, mobile devices and apps

For several years we have been reporting how the internet plays an increasingly important part in participants' daily lives. Going online is less an activity in its own right as an integral part of almost everything they do – a facilitator of everyday activities.

Examples include interaction with educational institutions, healthcare, job hunting, shopping, gambling, banking and, of course, keeping in touch with family and friends.

"Our university has an app – it's called Canvas. It's just so handy because I could be sitting in a lecture and the lecturer could say something and go onto the next slide and I'll be confused… I can go onto my phone and get the exact lecture she's looking at and realise what she was talking about."
F, 19, Student, Belfast

"It's amazing the interaction they [son's school] have with us. They email us and tell us what's going on in the next month. Back in the old days – when my parents were young – email was nothing. The only way to get in touch was a phone call and when you got a phone call from school, you were worried."
M, 33, Station Assistant, Birkenhead

"When the kids go on holiday they're FaceTiming you, showing you the balcony, their room… and what cocktails they're drinking."
F, 53, Housing Officer, Coventry

In this wave we heard some interesting new examples of (e.g. banking) apps being seen to add value to an interaction or service compared to the equivalent offline experience.

"Monzo is essentially a bank. When you use your debit card abroad it will give you market exchange rates for currency. But what's great about it as well is that it has an associated app. Every time you make a purchase you get a little notification and it will split payments into categories so you can see what you're spending your money on."
M, 23, Tutor, London

Different participants mix online and offline activities in different ways to suit their specific needs or preferences. When it comes to shopping, for example, some prefer to research online and buy in person – others the other way around.

"When my children ask me for something I'll have a look online and I'll order it – from Marks and Spencer's for example – but I'd go and collect it. They don't send it, I just order it online."
F, 75, Retired, Edinburgh

"Especially now that I'm older I don't want to tramp the streets, I'll do my due diligence there [the internet] first, price things up, then I'll go look at it in person."
F, 58, Unemployed, London

5.2 YouTube continues to grow in importance and influence

15 out of 19 participants now use YouTube at least occasionally. The ability to cast from mobile devices to smart TV sets has further increased its big screen usage and appeal to some participants.

YouTube is used variously as a music streaming service, podcast platform, search engine, news service, TV platform, sports highlights channel, etc.

"I like to listen to lots of remixes of songs and I find they don't actually have them on Apple Music. That's a bit annoying so when I'm in the gym I'll use YouTube for my music."
F, 19, Student, Loughborough

"There's not a lot of things for people of colour on TV so I can get a lot of American stuff on YouTube, things that you just wouldn't get here."
F, 58, Unemployed, London

"If I can't watch a film because it's too late at night, I'll just watch something on YouTube like 'ten interesting facts about something'. I'll just sit there and watch that because I know it's only fifteen minutes before I go to bed. Or like UFC or football highlights."
M, 30, Plasterer, Swansea

In previous years some parents have expressed concern about their children's use of YouTube, and particularly the danger of them being exposed to inappropriate content. In this wave, widespread use of YouTube Kids by parents of younger children had mitigated some of their concerns.

"I think I'm more aware of what [daughter] is up to on these apps, she's still only got access to the kids version of YouTube and things like that."
F, 42, Fundraising Manager, Cardiff

Nevertheless some concerns were voiced both by parents and others about just how influential they feel YouTube's algorithms and recommendations have become in directing users towards certain types of content.

"We have more or less wiped out her usage of things like YouTube Kids because of the algorithm and because of the type of stuff she's watching. Apart from the fact it's meaningless and consumer driven, she's taken down this rabbit hole of watching people play with their toys."
M, 40, Web Officer, Cardiff

"I think that they're the worst example of the attention economy, gaming the way people are and influencing the way people behave to get them to stay online more. Showing more and more extreme stuff, getting people to engage in the most base and guttural way… It's one thing to say your platform is a conduit through which people can consume videos but it's another thing to recommend videos. I think YouTube's recommendations account for ninety percent of their video watches. You're no longer just a platform, you are selecting and curating videos to show to people. You are a publisher and they don't hold any of the obligations of being a publisher."
M, 36, Financial Services Exec, London

5.3 Participants weigh up various factors when deciding whether or not to trust online content

When asked what they consider when evaluating the trustworthiness of online content, participants cited a number of factors.

Awareness, knowledge or – ideally – previous experience of the site or source was perhaps the most important factor determining the level of trust accorded to it.

"I guess you do trust the apps and the sites that you've used before more so than if you are – for example – booking a holiday with a company you've never used before… Our local council website I hope that I could trust that."
F, 42, Fundraising Manager, Cardiff

"Somebody that I went to university with shared something about hormone replacement or contraception for girls and it was this massive thing, but I wondered where her sources were… She's not an idiot and she was sharing it on her story saying it was important but not questioning it. She shares it, the next person shares it and the next minute people think it's Bible."
F, 27, Trainee Solicitor, Edinburgh

Sometimes participants described themselves making a judgement based on visual cues from the website or video itself (production values, size of audience for a live event, etc.)

"Everyone's got an opinion on some things and you have to filter out where it's come from. If it comes from an academy, then you're more inclined to believe what they say. If it's professionally-made then it's the sort of thing you can trust."
M, 65, Semi-retired, Pinner

Other factors mentioned by participants included the number and nature of comments made on an article or video, the number of similar search results, and the number and quality of ratings and reviews (where relevant).

"I just typed in 'Why not to have a smart meter' and lots came up; then I typed 'Why to have a smart meter' and very little came up except from the people who want to give you smart meters."
F, 58, Unemployed, London

"I think it's evident that [TLDR News YouTube channel] is pretty nonpartisan, I think it's also interesting that the comments on the videos often say 'Thank you for presenting this in such an unbiased, matter of fact way'. In some cases there is validation in the comments on these videos."
M, 23, Tutor, London

5.4 Experience of harmful/hateful content is relatively rare among the participants

Direct experience of online harm continues to be relatively rare in our sample, but it is clearly distressing to those involved. Two participants described incidents in the previous year where – with different levels of seriousness – they had been victims of unwanted attention online.

"I did get a dick pic the other day and I wasn't happy. We started talking for five minutes and he said something about 'I bet you're good at blowjobs'. I said 'you're one step away from getting blocked' and with that he sent me a picture of him holding his whatsit – so I blocked him."
F, 46, Stay-at-home Mum, Rural Essex

"She put up a video of me and someone had written underneath it 'Ew'... I remember going on her profile thinking 'Who does she think she is?' I was so bothered by it. After getting that I realised I never want to be Instafamous, YouTube famous or anything. I think that's the most toxic thing ever."
F, 27, Trainee Solicitor, Edinburgh

Around half the sample claimed to have witnessed some form of harmful/hateful content in the previous year.

"I think now it's spiraling out of control. After football games, recently I remember Tammy Abraham missed a penalty against Liverpool, he got racially abused by Chelsea fans."
M, 20, Odds Trader, Leeds

Most are resigned to the fact that they are likely to be exposed to such content and feel that it is difficult to regulate, especially with the advent of live streaming.

"That's how human beings are. Back in the day it was poison pen letters pushed through a letter box and you didn't know who'd sent it. Things were more confined into little groups. Now we're all connected, the whole world is connected."
F, 58, Unemployed, London

"Obviously, most apps – including Facebook and Instagram – have a live streaming function, but it's very weird to think about what kind of things could actually be live streamed. I don't know how any company could possibly control that."
M, 23, Tutor, London

"It's like King Canute, trying to hold back the tide. You can't! They've made a monster and now they've got to live with that monster."
F, 58, Unemployed, London

As we found when we discussed this topic in depth with participants in the previous wave, most participants' first instinct is to ignore or block – rather than report – the perpetrators of such content. Some participants were not sufficiently concerned by it to take action; others were concerned, but had little confidence in their complaints being acted upon.

They were most likely to be proactive either when they had personal experience of harmful content directed towards them, and/or they felt that online critics were attacking a vulnerable individual en masse (Greta Thunberg was the most high profile example of this).

"If I saw a post where all the comments were ganging up on the person and being horrible, I probably would report them because I know what that person who's being ganged up on feels like. I have been in their position."
F, 19, Student, Belfast

"When Greta Thunberg was saying she was doing this and that, and supporting these different rallies, I ended up clicking on that and seeing some of the thread below. Mostly it was support but then actually there was a surprising amount of horrible, vile abuse thrown at this young girl… In all cases where I reported them, because of the level of abuse, they were successful in removing or suspending those accounts. I am pleased about that."
M, 40, Web Officer, Cardiff

6. SOCIAL MEDIA AND MESSAGING APPS

6.1 Some participants claimed to use Facebook less than before, but many are increasingly active on Facebook-owned platforms such as Messenger, Instagram and WhatsApp

In line with a trend we have seen in the past few years, we witnessed a further reduction in claimed use of Facebook in this wave, especially amongst younger participants.

"I would have been on Facebook all the time whereas now, I've gone off it, I won't really be checking it as much."
F, 19, Student, Belfast

"I generally don't put much on. We've been away for the weekend for a friend's fiftieth, so my wife put some things on yesterday and tagged me in them."
M, 45, Engineer, Rural Derbyshire

"My profile still exists but I haven't logged on, probably for nearly three months now."
M, 23, Tutor, London

A number of reasons were cited including having grown bored of Facebook, lack of time and (in some cases) concerns about Facebook as an organisation and how it uses personal data. Such concerns first came to the fore in the wake of widely publicised revelations about Cambridge Analytica in 2018.

"I'm actively looking to cancel my Facebook account now. The only reason I've not done it yet is because I don't want to just delete it, I want to go through and actually delete my posts and messages because even when you delete your account there are some data points that stick around and aren't deleted with your account, so you need to go through and actually delete them one by one."
M, 36, Financial Services Exec, London

Despite any misgivings about Facebook as an organisation, the main beneficiaries of any decline in claimed usage of Facebook seem to have been its sister services Instagram, WhatsApp and Facebook Messenger.

"I use it to check in with my friends, but that's more of the Messenger side of it, rather than me going on their Facebook page and saying 'Hi, how are you?'"
F, 42, Fundraising Manager, Cardiff

"My friends have all gone to Instagram and more people are using it [Facebook] less. There's just not that much going on on Facebook any more."
F, 31, Doctor, London

In particular Instagram was described as being more visually appealing and engaging, largely attributable to its focus on photos and videos. Some participants also liked what they considered to be the greater immediacy of Instagram (particularly Instagram Stories).

"Every time I go on it [Facebook], I feel like I've seen everything so I click out again… Instagram, every time you go on there's something new at the top. It's literally stories; you're seeing a snapshot of that person's day whereas a picture could be four years old and just been uploaded."
F, 19, Student, Belfast

"My boyfriend put a limit on my phone for social media time. It includes WhatsApp and Instagram. The limit will come up and I'll just click 'ignore for the day' and keep scrolling. I think it's when I'm tired, or when I'm meant to be studying and I'm bored. Once you start scrolling on that home page, you get nothing out of it and whatever length of time later you just think 'That's forty-five minutes of my life I won't get back.'"
F, 31, Doctor, London

6.2 Messaging apps have become an almost ubiquitous tool across the sample

The use of messaging apps has grown significantly over the past three years of the study. All participants now have smartphones, and every participant now has access to at least one messaging app.

WhatsApp is the most popular (used by all), but Messenger is also widely used. Many participants use a portfolio of different apps for different groups or stick to Messenger if they don't want to share their phone number.

"Before we arrived at uni, we were following the Loughborough [Facebook] page and it adds you into a group chat [on Messenger] when they find out what accommodation you're in."
F, 19, Student, Loughborough

"Whoever the admin of that group was just added everyone in the class, so that's why we'd use WhatsApp; but if I was messaging my mum or someone it would be Facebook."
F, 19, Student, Belfast

"When they ask me if I have WhatsApp I say no, because I'm not passing out my number. So the only people who have got that are proper family and friends."
F, 46, Stay-at-home Mum, Rural Essex

In some cases, older users have been encouraged to get WhatsApp by younger family members.

"Well I'm on WhatsApp because my daughters are on WhatsApp, and my sisters… It's cheaper, I believe."
F, 75, Retired, Edinburgh

Family and friendship WhatsApp groups are now important communication channels. These have replaced (to varying degrees) texts, phone calls and discussion on more general social media platforms such as Facebook. There were also many examples cited of event-specific groups.

"A lot of my friendships are still maintained through WhatsApp and as friendship groups change as we've left university and gone to work, social gatherings seem to be according to what WhatsApp group you're in… That's how we arrange anything really."
F, 31, Doctor, London

"Last week when I was away, just by pure chance my other three friends were away, all in different countries so we used the group. We were all in different time zones and we did have quite a bit of a giggle throughout the week."
F, 53, Housing Officer, Coventry

"We have a birthday party group chat set up for some of the mums at school. That one keeps coming back up as the girls' birthdays reoccur, so those groups do stay there."
F, 42, Fundraising Manager, Cardiff

Messaging apps are now also being used by some participants for voice and video calls. (FaceTime seems to have become the generic term for video chat, irrespective of what app the participants are actually using.) In parallel, reported usage of texts and emails is declining.

"I sometimes video call. I FaceTime or video call my sister a lot because she's in London. My mum video calls on WhatsApp all the time because she's got an Android so she can't FaceTime. So it's good in that sense so you can FaceTime on WhatsApp."
F, 27, Trainee Solicitor, Edinburgh

"I use it [WhatsApp] to message my nieces. I like it because you can use FaceTime if you want to. What I like about it is it's free. Sometimes I forget I've got no money on my phone until someone sends me a text message and I want to send one back but I can't. I don't think anyone texts anymore anyway. I think people just use WhatsApp."
F, 58, Unemployed, London

7. PERSONAL DATA, PRIVACY AND SECURITY

7.1 Participants increasingly voice concerns about technology "spying" on them

In the last wave of interviews, a number of participants voiced concerns about contextual advertising being served up to them for items they had not previously searched for online. They suspected that their devices must be listening in on them. In this wave we heard a more diverse range of concerns about technology intruding on participants' privacy.

A common complaint was about smart speakers such as Amazon Echo (and other devices powered by Alexa), Google Home, etc. listening in to their conversations; this was felt to be particularly personal and intrusive.

"In normal conversation with people… it picks up certain keywords, and even though it wasn't directed at Alexa, certain keywords obviously triggered a response, which we didn't actually want. Plus there were things in relation to privacy."
M, 65, Semi-retired, Pinner

"I get creeped out by things like that, one of my friends had one and it was just randomly laughing in the corner."
F, 46, Stay-at-home Mum, Rural Essex

"The phone's even asked me: do you want a remote assistant? No I don't, thank you very much, want a remote assistant that's going to listen to everything I say and just pass it on."
F, 58, Unemployed, London

Other concerns were more sporadic. These included suspicion of the growing use of facial recognition software either on devices and/or in public places, and the risk of third parties having access to personal data, images, etc. stored in the cloud.

"We're constantly monitored. You can't walk from here to the town centre without cameras knowing which way you've gone. The location services on an Apple phone, I found out about that years ago. Because I use my phone as a SatNav, mine's on, but that shocked me when I first found out about it. They can literally tell exactly where you've been and when."
F, 42, Fundraising Manager, Cardiff

"I don't want people to look at my photos of my daughter's stuff. That's what scares me, that's why I don't like backup procedures in case you lose your phone. Who's looking at this shit? Where's it backed up to? What cloud? I don't understand."
M, 30, Plasterer, Swansea

"I can bear with the idea of biometric readings of thumb prints or fingerprints or whatever it might be but, for me, facial recognition is one step too far. It's several steps too far. It's one iteration for them but it's several steps too far for me."
M, 36, Financial Services Exec, London

The most digitally literate participants articulated more fundamental concerns about companies linking behavioural and location data to "track" them, and the ability of major organisations like Facebook and Google to link and mine data sets from multiple sources.

"I do think the technologies are amazing – like the wearables that you can read all sorts of things on and use to make decisions about your life: whether you're fit or not, how you're eating. I do see the benefit there, it's not that I don't see the benefit but it's where that data goes. That's really intimate data that can be used to identify you and learn so much about you. Big data knows more about you than you do about yourself. I think that's really, deeply concerning to me as an individual."
M, 36, Financial Services Exec, London

One reason for some participants being significantly better informed in this wave about the use of big data by corporations was that they had watched the Netflix documentary *The Great Hack*. Several participants had seen this, and it had left a lasting impression on them.

"I watched a documentary on Netflix on my flight to Hong Kong called The Great Hack which was a full documentary about the Cambridge Analytica stuff… the fact that Facebook allowed this to happen and the way Facebook makes its money through data collection and selling large amounts of data or at least through allowing its service to be used by other companies who can then mine it for data. I just got a bit angry about the whole thing."
M, 23, Tutor, London

"After I watched that my eyes were opened and I thought that was really scary and significant and we should be very, very bothered by it."
F, 27, Trainee Solicitor, Edinburgh

7.2 Participants continue to accept cookies, terms and conditions and privacy policies without question

Notwithstanding the widespread concerns described above, most participants continue to accept cookies, terms and conditions and privacy policies without question. Sometimes they justified this by arguing that they have no choice but to accept them, that they assume that such terms and conditions are standardised across sites (so there is no need to read them each time) or that they are not important enough individuals for the companies in question to care about.

[Do you ever read the terms and conditions?] "No. Does anyone? You should do really shouldn't you." [Why don't you?] "I thought it was all the same."
M, 30, Plasterer, Swansea

"I just don't think I do anything so interesting that Amazon would want to listen in to it. I'm sure if I was famous I would take exception to it but I don't think I'm who Amazon wants to listen in to."
F, 31, Doctor, London

"They always say 'Do you want to accept the cookies?' or whatever and you accept it. Sometimes you don't want to accept it but you need to accept it just to see the screen. So in a sense you've got no choice."
M, 33, Station Assistant, Birkenhead

If they do stop to think about the implications of their behaviour in terms of privacy and personal data, some become quite concerned.

"I've become quite interested in tech and big data and the more I read about it the more I feel that I understand the bigger picture and the way these things hang together and the value of these things to private companies and the way that we as individuals aren't always aware of what we're giving up."
M, 36, Financial Services Exec, London

"I don't think about it because it scares me, I like being naive about all this stuff."
M, 30, Plasterer, Swansea

7.3 There were widespread security concerns, particularly about increasingly sophisticated phishing attempts

Across the sample there were widespread reports in this wave of participants being targeted by increasingly sophisticated phishing attempts (variously via email, text, phone and even post). None had fallen prey to any of these attempts, but there had been a number of close calls.

"I've had a number of people email me to say that my TV licence has expired… I'm not into coincidences. No one is going to convince me that – somehow or other, I don't know because I don't have the knowledge – somewhere someone doesn't have information about the TV licence."
M, 65, Semi-retired, Pinner

"I've had a couple of phone calls recently claiming they were BT threatening to turn off my BT because I haven't made my payments and asking for the last four digits off my card. I said no and put the phone down."
F, 75, Retired, Edinburgh

"The Companies House [letter] said that we were being fined because we hadn't submitted our accounts on time but we'd done them months ago via an accountant so it was signed off and everything. They said we needed to ring Companies House on this number and pay this fee otherwise they were going to take court action. We rang Companies House straight away, first of all with our backs up because we'd done all of it and they said 'We're really sorry, that's a scam letter.'"
F, 42, Fundraising Manager, Cardiff

"I think the technology companies are becoming cleverer and more savvy so why not the thieves and the hackers and those committing fraud?"
M, 40, Web Officer, Cardiff

Those participants who have had negative experiences online in the past tend to be more questioning and cautious than others, and are more likely to take practical measures to protect themselves. These range from relatively sophisticated and media-literate actions (e.g. being more vigilant about their privacy settings, using two-factor authentication) to more primitive solutions (e.g. deleting all incoming email that is not from a handful of trusted sources).

"I always get emails from Facebook saying 'Somebody has tried to log into your Facebook, enter your username and password to stop this happening' or some rubbish like that… I know that's not right because I've got it set up so that if I want to log in I have to enter my username and password then a code is sent to my phone and I have to put the code in – it's two-step verification – so I know that that's rubbish."
F, 19, Student, Belfast

"I learned from that mistake. In my focused inbox I have invoices from people I know and everything else… I don't even look at them; I just delete them."
M, 30, Plasterer, Swansea

Although there were some areas where participants were generally well-informed about likely dangers (e.g. phishing), there were others where many demonstrate an almost complete lack of knowledge. So, for example, most participants were unaware about the potential security risks of not upgrading apps and system software regularly on their smartphones.

"I ignored it for ages and then it kept pinging and pinging so I asked the kids 'I've got this message about a software upgrade' and they said 'Just press yes mum'."
F, 53, Housing Officer, Coventry

"A lot of the time I have found I've left it and not done the update, then your phone starts slowing down and things start happening… as if to say 'You need to do it'."
M, 45, Engineer, Rural Derbyshire

8. NEWS

8.1 Across the sample as a whole, an increasingly eclectic range of news sources is being accessed

In terms of news sources, the BBC (though not immune to criticism – see below) remains the principal reference point for many participants, and the source to which they would turn first in a crisis.

"Most of it will be through the BBC News website. I don't even use the app."
M, 23, Tutor, London

"If I had heard something and I didn't know whether it was true I'd usually use Google or BBC News."
F, 19, Student, Belfast

As with the viewing behaviour described in section 4.1 above, over recent years we have witnessed a growing fragmentation and personalisation in news consumption across our sample. The increased use of online platforms to consume news has blurred the distinction first between broadcast news providers and newspaper brands, secondly between UK and international news providers and lastly between established news organisations and independent content producers.

In this wave, participants cited an eclectic range of sources from across the world, which they access via a mix of social media, apps, websites, podcasts, TV and radio. In particular there was an increase this year in the number of US-based news sources participants claimed to use (including CNN, the New York Times and The New Yorker).

"I quite like the current affairs and topical podcasts. The Guardian does Daily Focus, I really enjoy that. I listen to that almost every morning. The New York Times also have a really good one."
F, 27, Trainee Solicitor, Edinburgh

"Generally, if I've got five minutes, I go on Facebook. I've also got The Sun app, even though I buy the paper."
M, 45, Engineer, Rural Derbyshire

"Apple News comes automatically and then there's the BBC and I feel I have to get that. The other news apps that I have are France 24 and CNN."
M, 75, Retired, Warwick

"Some news that I access will be through something like LinkedIn or also through YouTube. There are a few contemporary issues discussion channels one of which is called TLDR, which stands for Too Long Didn't Read."
M, 23, Tutor, London

"We put it up and it comes on whatever the channel is. Then we've got the dark web… it's not mainstream media it's people who use a different name and wear a mask so you can't see who they are. It's Anonymous [We are Anonymous]. They do a little speech about what's been going on and it's really interesting getting a different perspective."
F, 46, Stay-at-home Mum, Rural Essex

Participants' judgement of the trustworthiness of a news source or story tends to be heavily influenced by the degree to which it reflects their existing attitudes. Even those who claimed to access a range of views often seek those views from like-minded sources.

"Apart from BBC News, I quite like Channel 4. I think it's quite hard hitting. The Guardian as well so I'm sure I'm giving you a flavour of my political leanings but I genuinely believe they're actually focused on good journalism."
M, 40, Web Officer, Cardiff

"Knowing what the source is, you know what to expect in terms of the way the subject matter is being presented and the angle somebody is going to be choosing to follow. You know that if there's an article from The Sun then you can quickly move onto something else because either it's trivia or it's bigoted."
M, 75, Retired, Warwick

8.2 Attitudes to news are becoming more polarised

In this wave we witnessed more numerous and more extreme examples of polarisation in participants' attitudes to news than we have seen in previous years, firstly between those who want a lot of news versus those who don't want any.

"I have become more interested in the news in general, probably because of the whole Brexit thing. Politics is quite interesting."
M, 23, Tutor, London

"I came back home this weekend and my mum had the Brexit news on and I asked what's happening… I have no idea. I see some advertisements on Facebook and I don't even bother, I just ignore them."
F, 19, Student, Loughborough

"The news is on the telly, you listen to it and think it's shocking. Sometimes I turn over because it's just depressing."
F, 58, Unemployed, London

Secondly there were individual differences between those who value getting their news as quickly as possible (e.g. via social media or 24-hour news channels) versus those who prefer it summarised and carefully considered (e.g. via publications such as *The Week*).

"If I was looking for anything important I would probably use the BBC but close behind is Sky. I think Sky News can be quicker than BBC but there's not that much between them."
M, 65, Semi-retired, Pinner

"You'll get the BBC thing, then you get Metro saying the same thing like five minutes after where, obviously, they've caught up with what it is and now they're pushing it through their sources."
F, 42, Fundraising Manager, Cardiff

"We have a subscription to The Week, which is brilliant. I'd rather wait for a couple of days and read the more balanced view. The Week makes the news easier to understand."
F, 31, Doctor, London

Lastly there was a contrast between those participants who want their news to appear unmediated (in the form of "fly on the wall" video, even though they are consuming this via sources such as YouTube channels which are highly selective in what they show) versus those who claim to prize commentary, analysis and opinion.

"The politics [I watch] will either be Nigel Farage, what's going on in The Houses of Parliament, The House of Commons, or anything to do with Donald Trump."
F, 46, Stay-at-home Mum, Rural Essex

"There's YouTube videos in relation to what's happened in Parliament, or Farage... in my view he can be an eloquent individual who grabs a room. It shows you some of his speeches within the European Parliament."
M, 65, Semi-retired, Pinner

For the first time in this wave we had three participants (all young men) who had decided to pay for long-form content (two subscribers to *The New Yorker* magazine and one to *The Athletic* website).

"I'm about to sign up to The New Yorker on an introductory deal because I've read a few bits there and I really enjoyed them. They have long form writing as well, which is unusual. Most things are short and punchy nowadays. They take a long view on things and write really extensively which is quite interesting."
M, 36, Financial Services Exec, London

"I don't know if you've seen the new Athletic but you pay... I think it's £3 a month. I signed up to that and it's really well written. They have a small pool of very well-respected journalists on there who don't write poor articles, so I was willing to pay it. I don't regret paying it. I'd probably pay more."
M, 20, Odds Trader, Leeds

8.3 Criticism of BBC News was more widespread

Whilst we have heard sporadic criticism of BBC News in each wave of interviews since the EU Referendum in 2016, in this wave the criticism was much more widespread. Around half the sample were critical of BBC News in some way – usually in relation to its coverage of UK politics and the Brexit debate (in particular). The specific criticisms were diverse and tended to reveal the political leanings of the individual concerned.

Some of these participants continue to look at BBC News on TV and/or online, but do so more critically than ever before. Others claimed to have stopped looking at BBC News altogether (although there was evidence in the follow-up interviews we conducted during the early-lockdown period that some of these participants had returned to BBC News specifically for news and information about the Covid-19 pandemic – see Annex 1).

"I used to think the BBC was more neutral and I wish I could think of examples now but recently there's been a few articles that I've read that are not neutral at all."
F, 31, Doctor, London

"A lot of it doesn't cover what you really want to know, and the bits they do cover are kind of anti what you want to see. They're basically slagging off who you actually like."
F, 46, Stay-at-home Mum, Rural Essex

"I don't think that I've got personal experience of thinking they've got really high standards, so I think that my expectation of what they should be doing has been born out of my Britishness – this is our national broadcaster, they set the standard, I think that's where it comes from. So I'm disappointed when I find that that's not the case and it annoys me. Is it that some people are not that good, or are they just lazy?"
M, 36, Financial Services Exec, London

There was even some evidence among our participants that concerns about BBC News have coloured their broader attitudes to the BBC. One participant who we would expect to be a BBC loyalist (an educated, retired, middle-class man who listens to Radio 3 and watches BBC Four) was especially vociferous in his criticism.

"I think that Lord Reith must be rotating in his grave because of much of the stuff that comes onto much of the BBC… The insistence on so-called balance and giving the right-wing politicians a mouthpiece on the BBC is doing the country a disservice."
M, 75, Retired, Warwick

Another participant had been heavily influenced in his view of the BBC by the *Panodrama* documentary published on Tommy Robinson's YouTube channel.

"I don't like the BBC. Did you see that Panodrama he did? She's got a button camera and you can see the BBC geezer saying to her 'Do you reckon we can say something about him doing something to you sexually?' when it actually wasn't true. He bought her a glass of champagne, trying to get her a bit drunk and say things that maybe are or aren't true. He spent three grand of the taxpayer's money on that one night, and all the time she was videoing it. It's totally true."
M, 30, Plasterer, Swansea

ANNEX 1

Summary of findings from Covid-19 early-lockdown interviews

In the light of dramatic changes to daily life in the UK as a result of the Covid-19 pandemic, we re-contacted some of the participants from Adults' Media Lives to discuss how the lockdown was affecting them, how their media behaviour had changed and how they were staying informed.

We recorded a total of ten c.15-minute video interviews using the Zoom online video conferencing platform. The interviews were conducted by Mark Ellis and Tony Harbron in the early part of the lockdown period, between 30th March and 6th April 2020. This was the second week of the lockdown, which had been imposed by the UK government on 23rd March. (At the time of interviewing, the lockdown had been set for a minimum of three weeks, to be reviewed on 16th April.)

The key findings from these interviews were as follows:

- Most, but not all, participants were consuming more news, from a variety of sources and platforms.

- BBC News in particular was being used more often than usual by most participants.

- The UK Government's key messages were reaching people and participants felt confident that they could distinguish between official Government messages and information from unofficial sources.

- Most participants felt well-informed about what was happening, and claimed to be confident in their ability to separate credible sources from fake news.

- Some participants were actively seeking a broader perspective of the pandemic from a wider range of information sources.

- Daily life had changed to varying degrees for different individuals; this had, in turn, impacted on people's media behaviour in different ways.

- Those who were already highly connected in terms of using the internet for work, learning, etc. had adapted most easily to the lockdown.

- There had been a growth in the claimed use of social media, particularly for activities such as streaming live content and participating in challenges.

- Almost all participants reported a much-increased use of video chat apps such as FaceTime and Zoom for keeping in touch with family and friends, and for participating in social events.

A more detailed report on this research can be found in a separate document: https://www.ofcom.org.uk/__data/assets/pdf_file/0030/195627/adults-media-lives-lockdown-interviews-report.pdf

ANNEX 2

Summary of participant profiles – Wave 15

Sex	Age	Job	Location	Years in study
Female	19	Student	Belfast	1
Female	19	Student	Loughborough	6
Male	21	Betting Odds Trader	Leeds	7
Male	24	Tutor	London	6
Female	27	Trainee Solicitor	Edinburgh	12
Male	30	Plasterer	Swansea	14
Female	31	Doctor	London	14
Male	33	Station Assistant	Birkenhead	4
Male	36	Financial Services Exec	London	15
Male	40	Web officer	Cardiff	14
Female	42	Fundraising manager	Cardiff	14
Male	45	Engineer	Rural Derbyshire	15
Female	46	Stay-at-home mum	Rural Essex	14
Female	53	Housing officer	Coventry	15
Male	58	Unemployed	Lisburn, NI	12
Female	58	Unemployed	London	14
Male	64	Semi-retired	Pinner	14
Female	75	Retired	Edinburgh	12
Male	75	Retired	Warwick	3

ANNEX 3

Discussion Guide

1. 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)]

Do you own, or have you considered getting, any wearable technology such as Fitbit or the Apple Watch? If so, how do you use it, and what difference has this made to your daily life? If not, why not?

Do you own, or have you considered getting, a smart speaker for your home such as the Amazon Echo (Alexa), Apple HomePod or Google Home? If so, how do you use it, and what difference has this made to your daily life? If not, why not? Do you have any concerns about using the speaker? [PROMPT, IF REQUIRED: ARE YOU BEING LISTENED TO? IS IT GATHERING INFORMATION ABOUT YOU AND YOUR FAMILY?]

Do you own, or have you considered getting, any other smart home technology? Examples of this [IF REQUIRED] are Hive or Nest (to control your heating), Ring (to see who's at your front door) or Hue (to control your lighting). If so, how do you use it, and what difference has this made to your daily life? If not, why not?

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.]

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

2. 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?

Are you happy with your current broadband speed? Do you know what it is? Would you know how to check it?

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

What prompted you to switch?

Did you receive any notification from your current provider that your contract was about to end and explaining your options? (This could have been in the form of a letter, email or text message.) If so…

How useful did you find being notified?

How easy was the notification itself to understand?

What was the experience of switching like?

How did you decide on which provider 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?

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)?

Did you receive any notification from your current provider that your contract was about to end and explaining your options? (This could have been in the form of a letter, email or text message.) If so…

How useful did you find being notified?

How easy was the notification itself to understand?

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

Why did you decide to stick with your current provider?

For any services which you have not switched or renewed…

Do you know how long you have left on your current contract?

What do you intend to do at the end of your current contract?

How easy do you think it is to switch to another mobile provider?

Were you aware that new rules have been introduced to try and make it easier to switch to another mobile provider? (You just have to text your current provider to ask to change.)

Have you tried doing so?

Would this make it more likely that you would switch providers in future?

3. Television

Overview

How do you watch television and streaming services 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.]

Where do you watch on your smartphone/tablet? [PROBE ON USE OF MOBILE DEVICES TO WATCH IN-HOME VS COMMUTING, TRAVELLING, ETC.]

Which would you say is now your most important device for watching television and streaming services?

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?

Do you ever watch content on more than one device (e.g. TV and phone) simultaneously, or are there situations where there is more than one person in the room at the same time watching different content on different devices? [PROBE FOR DETAILS.]

Are there specific reasons or situations where you do this?

Do you think this makes the act of watching TV a less sociable activity?

<u>On-demand (OTT) or streaming services</u>

Do you currently have a subscription to an on-demand online film/video service? (This could be either through an internet-connected TV set (smart TV) or on a mobile phone/tablet/PC). Netflix, Amazon Prime Video and NOW TV are the main ones, but there are lots of others. 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 BILLIONS, SUCCESSION, CHERNOBYL, GOOD OMENS, STRANGER THINGS, THE DARK CRYSTAL, 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 better or worse than regular TV? 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 of these channels is via catch-up services like the BBC iPlayer or ITV Hub – whether it is on-demand or live streaming of programmes?

(iPlayer users only) Have you noticed any changes to the way in which BBC iPlayer makes programmes available to view? [PROMPT] The iPlayer now makes programmes available to view for longer than the original 30 days (a year for most programmes, and sometimes longer).

How important/valuable do you think this change is?

Have you watched any programmes that are more than a month old on iPlayer?

Does this change make you more likely to use iPlayer more often? If so, what other viewing would this replace?

(Scotland only) Have you watched the new BBC Scotland channel? If so, what did you like or dislike about it? If not, why not?

4. Radio and other audio content

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

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

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?

Thinking specifically about radio, which radio stations do you mainly listen to, and why?

[FOR LISTENERS TO MAIN INDEPENDENT LOCAL STATIONS LIKE HEART, CAPITAL, ETC.] Have you noticed any changes to your station in the past year (i.e. the shift to more networked programming and the disappearance of locally-produced breakfast and drivetime shows)? Do you think this is an improvement or not?

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. SPOTIFY, APPLE PODCASTS – USED FOR LISTENING]

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

Have you heard of the BBC Sounds app (the BBC's new app which allows you to listen to music, radio and podcasts all in one app)?

Have you used the BBC Sounds app? If so, what did you like/dislike about it? If not, why not?

Did you previously use the BBC Radio iPlayer app? Are you aware that this will soon no longer be available?

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

5. Internet

Has the way in which you access the internet changed over the past 12 months? [PROBE ON CONSUMPTION OF ROLE OF DIFFERENT DEVICES, ESPECIALLY SMARTPHONES AND TABLETS.] How did this come about? Has this 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, apps 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, apps and online services these days? Why is that?

How do you access your favourite websites (e.g. search engine/bookmarks/from memory)?

[WHERE RELEVANT] When you use Google (or another search engine), how often are you using this as a convenient way of getting to websites you already know, and how often

does it direct you to sites you wouldn't otherwise have come across? [PROBE FOR DETAILS.]

Do you ever use voice search to look up information online? If so, what do you like/dislike about it? If not, why not?

In the past year have you come across any information online which you suspected of – or later discovered to be – untrue? [PROBE FOR DETAILS.] What made you suspicious? What, if any, lessons did you learn?

In the past year have you come across any warnings that a website you are about to visit might be unsafe? [PROBE FOR DETAILS] If so, how do you react to this warning?

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?

6. 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]

Would you consider yourself to be a proactive social media user, who posts and shares quite a lot, or someone who mostly just looks at what other people post? Why do you say that?

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

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

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]

[FOR THOSE WITH CHILDREN UNDER 16] Do your children use social media at all? Which ones? Are you aware of any age restrictions to using [platform]?

More generally how aware are you of what your children are doing/viewing online? How closely do you monitor their internet use? Why (not)? How?

7. 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?

Do you use these mostly when you're at home, mostly when you're out and about, or both equally? Why? Does having access to wi-fi influence how likely you are to use messaging apps?

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

[FOR THOSE USING FACEBOOK MESSENGER] You mentioned that you use Facebook Messenger… do you still use your Facebook profile for other purposes (e.g. checking your timeline, sharing updates) or is Messenger now your main reason for having Facebook?

Have you experienced any issues with offensive or inappropriate messages being sent through these apps? [PROBE FOR DETAILS – WHAT DOES INAPPROPRIATE MEAN IN THIS CONTEXT?]

8. YouTube

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

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

How are you watching YouTube? [PROBE ON DEVICES USED]

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

When you're watching a video by [insert example] on YouTube, is it clear to you who is behind this video? Does it matter? How would you check?

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

Have you encountered any issues to do with the reliability of information you have found on YouTube, or elsewhere online in the last year? [PROBE FOR DETAILS.]

9. 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?

Do you feel confident that you would know how to contact (e.g.) your local council if you had to?

[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?

10. Gaming

Do you ever play games on a gaming console, PC or mobile device (including apps like Clash of Clans, Candy Crush or Pokemon Go)? [PROBE FOR DETAILS, ESPECIALLY AROUND ONLINE PLAY]

What games do you play? How often?

Do you interact with other people when you're playing online? If so, who?

Do you have any concerns about the amount of time you spend playing these games?

Have you ever experienced any problems with offensive or inappropriate behaviour from other players?

Have you ever been encouraged to spend money within any of the games you play [Probe: in-app purchases, skills boosters, loot boxes, etc.] If so, what do you do? What do you think of this?

11. 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 any of the social media sites 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?

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 on social media (e.g. ignore it / report it / respond to it / make a comment / unfriend that person, etc.)?

12. Regulation of the internet

Are you aware of any regulation of what is posted on YouTube, either in terms of truthfulness or in terms of taste and decency? What about social media like Facebook and Twitter? [PROBE FOR EXAMPLES]

Would it be a good thing if there was more regulation of content which appears on the internet? [PROBE FOR DETAILS]

Should internet companies like YouTube and Facebook take more responsibility for regulating the content which users post on their platforms, or should the responsibility fall on the end user to protect him/herself and his/her family online? [PROBE FOR DETAILS]

13. Privacy and Security

Personal data: trust

What concerns, if any, do you have about giving your personal data (e.g. address, phone number, email address) 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/app you are using (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?

Have you ever stopped signing up for a website or app part-way through because you were uncomfortable about giving them the personal data they were asking for?

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

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?

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

Do you read websites' and social media sites' terms and conditions before you register for them? If not, why not?

Are you conscious when you agree to these terms and conditions that your personal information might be used to target advertising at you? (If not) What did you think the purpose was of the terms and conditions?

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?

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?

14. Mobile

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

Have you changed your phone in the last year?

[IF YES] 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?]

Was the size of the screen a factor in your choice of phone? Why (not)? [PROBE FOR POSSIBLE USE OF LARGER PHONES AS TABLET REPLACEMENT.]

[IF NO] How long have you had your current phone? How much longer do you intend to keep it? What might prompt you to get a new one?

Have you changed network (or package) in the past year? If so…

How did you choose your network/package?

Have you increased (or decreased) the amount of data in your package?

Did you consider changing from a package to SIM-only?

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.]

Is your phone now your only or main source of accessing the internet? If so…

Why is this?

What benefits and/or problems have you experienced?

Which are the main apps you use?

Roughly speaking, how many of the apps on your phone are ones which you have installed yourself, and how many came pre-installed?

Have you ever deleted any apps from your phone?

How often do you upgrade the system software on your phone [PROBE: WHENEVER THEY ARE NOTIFIED OF AN UPDATE/OCCASIONALLY/NEVER]? Why (not)?

What do you think are the benefits of regularly updating your phone's system software? [PROBE FOR AWARENESS OF E.G. POTENTIAL SECURITY ISSUES OF NOT HAVING LATEST ANTI-VIRUS UPDATES.]

Do you ever "cast" videos, films or programmes from your phone (or tablet) to your TV? [PROBE FOR DETAILS]

15. 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 IN NEWS CONSUMPTION.]

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

To what extent do you actively seek out news – by making an effort to watch a news bulletin, visit a specific news site or use a specific news app – as opposed to coming across it "by accident" within the media you're already consuming (e.g. TV, radio, social media)?

Which are your go-to 'brands' for news now?

Would you choose a particular channel or website over others for getting up-to-date news on important issues such as what's happening with Parliament and Brexit at the moment?

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

Do you use any so-called "news aggregator" apps or sites such as Apple News, Flipboard, Google News or Feedly? If so, how often do you use them?

How do you think they choose which stories to show you? [PROBE ON AWARENESS OF USE OF ALGORITHMS TO PERSONALISE CONTENT.] To what extent have you "trained" them to show you certain types of content (e.g. by choosing subjects of interest, liking or disliking certain stories)?

How aware are you of the original sources of the news stories they show you? How can you tell? [PROBE ON ROLE OF LOOK/FEEL, STYLE, BRANDING, ETC.] Does this have any bearing on which stories you click on?

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

Have you seen anything in the past year that 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]