

# Adults: Media **use** and **attitudes** report 2019



Making  
sense  
of media

# Overview

This report examines adults' media literacy. Ofcom's definition of media literacy is 'the ability to use, understand and create media and communications in a variety of contexts'. The report is a reference document for industry, stakeholders and the general public.

The Communications Act 2003 places a responsibility on Ofcom to promote, and to carry out research in, media literacy. This report supports our work in this area.

Drawing largely on our quantitative Adults' Media Literacy Tracker, the report provides evidence on media use, attitudes and understanding, and how these change over time, among UK adults aged 16 and over. The report also includes a particular focus on those groups who tend not to participate digitally.

This report also draws on our qualitative [Adults' Media Lives research](#)<sup>1</sup> and quantitative [Technology Tracker](#) to provide an over-arching narrative on the key themes of adults' media experience in 2018. More detail can be found in the accompanying [chart pack](#) and [interactive tool](#).

## Key findings:

- **Mobile phones are increasingly integral to everyday life** and half of adults now say, of all devices, they would miss their mobile phone the most.
- **One in three adults never use a computer to go online and one in ten only use a smartphone**, an increase since 2017.
- **Video-on-demand and streamed content is becoming a central part of adults' viewing landscape.**
- **Social media users are less likely than in 2017 to see views they disagree with on social media.**
- **Compared to 2017, internet users are more likely to have encountered hateful content online**, however most didn't do anything about it.
- **Although most internet users are aware of at least one of the ways in which their personal data might be collected online**, less than four in ten are aware of all the ways we asked about.
- **There has been little change in critical awareness in the past few years**, with many still lacking the critical skills needed to identify when they are being advertised to online.

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<sup>1</sup> Our Adults' Media Lives research is a qualitative, longitudinal ethnographic video-based project which has been running since 2005. The research has followed the same (as far as possible) 19 participants over time, interviewing them at home to understand their relationship with digital media.

- **One in ten internet users say they don't think about the truthfulness of online content,** although those who do are more likely than in 2017 to make checks to verify the information.
- **Thirteen percent of UK adults do not use the internet, unchanged since 2014;** those aged 55 and over and in the DE socio-economic group remain less likely to be online.
- **One in seven adults of working age in DE households do not go online,** and when they do, one in five only go online via a smartphone.

## Media Lives, by age: a snapshot

### 16-24s:

99% use a mobile phone  
 12% only use a smartphone to go online  
 79% watch on-demand or streamed content  
 93% have a social media profile  
 47% correctly identify advertising on Google (among search engine users)  
 85% are aware of at least one way companies can collect personal data online (among internet users)  
 1% do not use the internet



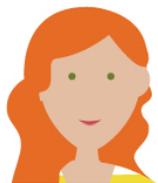
### 35-44s:

100% use a mobile phone  
 9% only use a smartphone to go online  
 75% watch on-demand or streamed content  
 84% have a social media profile  
 45% correctly identify advertising on Google (among search engine users)  
 82% are aware of at least one way companies can collect personal data online (among internet users)  
 4% do not use the internet



### 25-34s:

99% use a mobile phone  
 22% only use a smartphone to go online  
 71% watch on-demand or streamed content  
 91% have a social media profile  
 52% correctly identify advertising on Google (among search engine users)  
 86% are aware of at least one way companies can collect personal data online (among internet users)  
 1% do not use the internet



### 45-54s:

98% use a mobile phone  
 11% only use a smartphone to go online  
 69% watch on-demand or streamed content  
 76% have a social media profile  
 46% correctly identify advertising on Google (among search engine users)  
 84% are aware of at least one way companies can collect personal data online (among internet users)  
 7% do not use the internet



**55-64s:**

96% use a mobile phone  
9% only use a smartphone  
to go online

43% watch on-demand or  
streamed content

58% have a social media profile

48% correctly identify advertising on Google  
(among search engine users)

81% are aware of at least one way companies  
can collect personal data online (among  
internet users)

19% do not use the internet



**75+:**

81% use a mobile phone  
1% only use a smartphone to  
go online

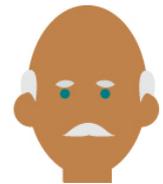
22% watch on-demand or  
streamed content

20% have a social media profile

46% correctly identify advertising on Google  
(among search engine users)

63% are aware of at least one way companies  
can collect personal data online (among  
internet users)

48% do not use the internet



**65-74s:**

92% use a mobile phone  
3% only use a smartphone  
to go online

34% watch on-demand or streamed content

34% have a social media profile

52% correctly identify advertising on Google  
(among search engine users)

72% are aware of at least one way companies  
can collect personal data online (among  
internet users)

33% do not use the internet



## Media Lives, by socio-economic group: a snapshot

### AB:

97% use a mobile phone  
4% only use a smartphone to go online



73% watch on-demand or streamed content

74% have a social media profile

57% correctly identify advertising on Google (among search engine users)

87% are aware of at least one way companies can collect personal data online (among internet users)

6% do not use the internet

### C2:

95% use a mobile phone  
16% only use a smartphone to go online



59% watch on-demand or streamed content

69% have a social media profile

50% correctly identify advertising on Google (among search engine users)

80% are aware of at least one way companies can collect personal data online (among internet users)

15% do not use the internet

### C1:

98% use a mobile phone  
7% only use a smartphone to go online



61% watch on-demand or streamed content

79% have a social media profile

47% correctly identify advertising on Google (among search engine users)

85% are aware of at least one way companies can collect personal data online (among internet users)

8% do not use the internet

### DE:

93% use a mobile phone  
17% only use a smartphone to go online



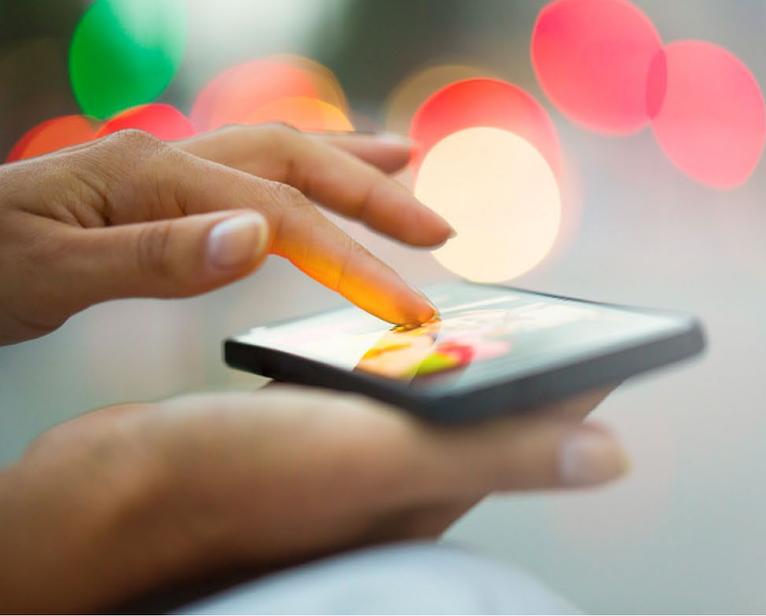
46% watch on-demand or streamed content

56% have a social media profile

37% correctly identify advertising on Google (among search engine users)

73% are aware of at least one way companies can collect personal data online (among internet users)

23% do not use the internet



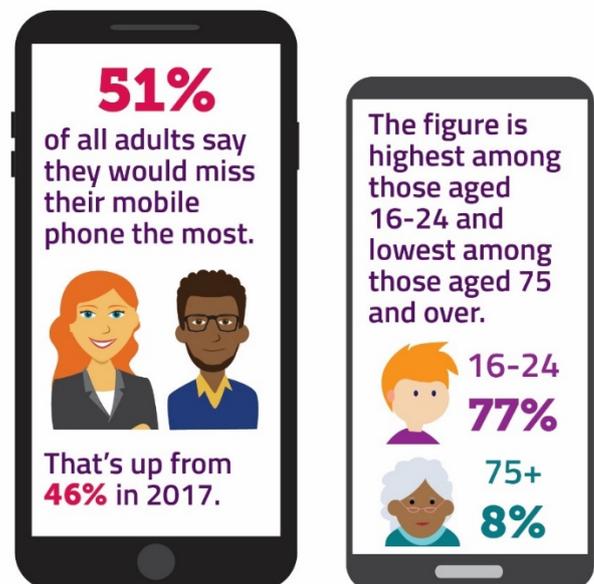
# Summary of key findings

## Changing online habits

**Mobile phones are increasingly integral to everyday life and half of adults now say, of all devices, they would miss their mobile phone the most**

Nearly every adult in the UK uses a mobile phone (96%). This is the case across all age groups; mobile phone use ranges from 100% among 35-44 year-olds to 81% of those aged 75 and over. And our reliance on mobile phones is growing; half of adults now say their mobile phone is the device they would miss the most if it was taken away, an increase since 2017. This reliance varies considerably with age and is felt most strongly among 16-24 year-olds (77%) and least strongly among 75+ (8%). As reliance on mobile phones decreases with age, reliance on the TV set increases; 5% of 16-24's say they would miss their TV set the most, rising to two-thirds of 75+.

## Proportion of adults who say their mobile is the device they would miss the most



Looking at the underlying behaviour driving this reliance on mobile phones; our qualitative Adults Media Lives research found that there are a number of core activities which almost all the participants in the study do regularly, such as accessing social media, messaging, shopping, and watching and listening to streaming services and YouTube. These core activities lend themselves readily to apps and mobile devices, and as such more of their use is via smartphones. Participants also highlighted specific examples of the benefits of smartphone apps. For example, one participant who is a gymnastics coach was

using an app on her iPhone to film and give feedback to the athletes whom she was coaching.

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

*Female, 18, Gymnastics coach, Coventry*

### **One in three adults never use a computer to go online and one in ten only use a smartphone, an increase since 2017**

While the proportion of adults who go online (87%) and the total average estimated weekly hours spent online (25.3 hours<sup>2</sup>) are unchanged since 2017, the way we are using the internet is changing. Adults now estimate they spend more time online out and about, compared to 2017 (2.9 vs. 2.5 hours).

People’s device use is also changing. Adults are less likely than in 2017 to use a computer to get online<sup>3</sup> (58% vs. 62%), and this has decreased by 20pp since 2013 (78%). As such, three in ten adults never use a computer to go online, with adults in the C2 (38%) and DE (35%) socio-economic groups more likely to do this, while AB adults are less likely (15%). And around one in ten adults say they only use a smartphone to go online; an increase of three percentage points compared to 2017, and again more likely among C2 (16%) and DE (17%) adults, and less likely among AB (4%) and C1 (7%) adults.

#### **Devices used to go online**



<sup>2</sup> Figures reported here are based on respondents’ own estimations of time spent online and therefore there may be a degree of over and under-reporting. This data is different to the ComScore data reported in Ofcom’s [Online Nation report](#) because comScore data combines panel and census measurement techniques to obtain digital audience measurement statistics.

<sup>3</sup> A computer is defined as a desktop PC or laptop

But only using a smartphone to go online can bring challenges; while two-thirds of smartphone users have ever used their phone to complete a form, or application (smartphone users aged 16-34 are more likely to say they have ever done this), seven in ten agree that completing forms or working on documents is easier on a computer.

Going online when out and about can put a drain on your data allowance, however it seems that smartphone users are getting better at managing data use. Compared to 2017, smartphone users are less likely to say they have ever used up their data allowance (34% vs. 38%). Those that have ever used up their data adopt mitigation strategies if they are at risk of running out; over half restrict their data use or only go online when they can use wi-fi and just under half just use their phone less for going online.

### **The range of online activities undertaken by internet users varies both by age and by socio-economic group**

Another aspect of understanding online use is to look at the types of activities that people are undertaking online. As in previous years, generally, internet users aged under 35 are more likely than average to have undertaken a wide range of online activities in the previous week, while those aged 55+ are less likely.<sup>4</sup> The widest range of online activities are undertaken by those aged 25-35, who are

more likely than average to have undertaken 14 of the 15 types of internet use in the previous week. At the other end of the spectrum, internet users aged 65-74 and 75+ are less likely than average to have undertaken all 15 types of activity in the previous week.

As in previous years, there are differences by socio-economic group in the range of online activities undertaken. ABs are more likely than internet users overall to have undertaken nearly all of the 15 types of activities in the previous week, with the exception of playing games online. In contrast, DEs are less likely than average to have been online in the previous week for 13 of the 15 types of activity; they are as likely as internet users overall to have been online for communications and for gaming.

We also asked internet users about the creative activities they had ever done online; the three most popular activities were adding filters to or editing a digital photo (35%), following online tutorials (31%) and making a video and sharing it online (29%).<sup>5</sup>

Our Adults' Media Lives study echoes these findings; we observed that participants' patterns of online behaviour are quite diverse and there is a clear segmentation between those who use the internet for what might be described as 'basic' tasks, and those who use it for a wider and more diverse range of

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<sup>4</sup> Internet users aged 16+ were prompted with 24 different internet activities and are asked to say which of them, if any, they have gone online to do, and which of these they have done in the previous week. For this initial analysis, 23 of the 24 activities<sup>4</sup> have been grouped into 15 types of use, to enable broader comparison. The 15 types of activities are: email, communications, banking, transactions, social media, news, accessing information for work/ school/ college, watch short video clips, listen to radio/ audio services, watch TV content, access health information, access government services, games, remote activities (e.g. accessing files through a cloud service or remotely control household appliances), uploading/ adding content.

<sup>5</sup> Internet users aged 16+ were prompted with ten creative activities and were asked whether they had ever done any of them online. The creative activities asked about are: adding filters to or editing a digital photo, following online tutorials, making a video and sharing it online, live-streamed videos, created an online photo book, calendar or personalised birthday card, made a meme or gif, made, built or modified a website or app, made a blog or vlog, created an online scrapbook of ideas and made own music online or changed/ edited someone else's music online.

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

## The evolving viewing landscape

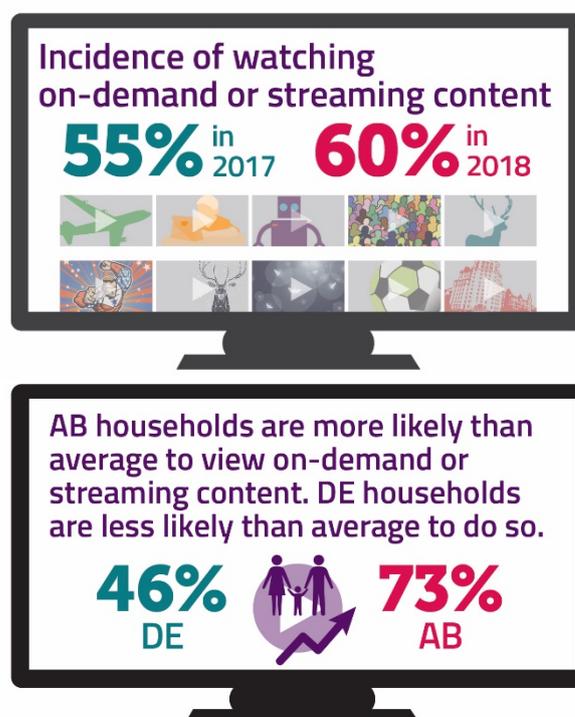
### Video on demand and streamed content is becoming a central part of adults' viewing landscape

Adults' viewing landscape is changing; there has been an increase in the proportion of adults who watch on-demand and streamed content (60%), compared to 2017 (55%). There are clear age and socio-economic differences in preference towards this type of content; 16-24s (79%) and ABs (73%) are much more likely than average to watch on-demand and streamed content, while 75+ (22%) and DEs (46%) are much less likely.

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

*Male, 23, tutor, London*

### Proportion of adults who watch on-demand or streamed content



With the proliferation of online services offering on-demand or streamed content, it can be hard to decide what to watch. When asked, almost six in ten adults seek familiar content and choose programmes because “it’s something they watch regularly”. Catching up on programmes is also a popular reason; close to half say they choose content because they missed it when it was originally broadcast. Social media seems to be a big influence in content choice among viewers of on-demand content aged 16-24, who are more likely than average to pick based on social media reviews (25% vs. 14%). Browsing through the service to see what’s available is a less popular method of discovering content than it was the previous year (46% vs. 54% in 2017).

The popularity of video-on-demand and streaming services is clearly illustrated in our Adults’ Media Lives research. Our participants continue to reference streaming services extensively in their discussion of their viewing habits, and the majority have access to at least one subscription-based streaming service. We also found this year that YouTube, which has been a popular viewing platform for many of our participants for a number of years, has become more important as some move towards more viewing on mobile devices. This year, for the first time, two of our participants said that YouTube is now their first port of call for ‘TV viewing’ and a few of our participants now don’t have a TV set at all, or if they do, it is not connected to a traditional terrestrial/ satellite/ cable service.

## Exposure to opposing views and unwanted experiences online

### Social media users are less likely than in 2017 to see views they disagree with on social media

The proportion of internet users with a social media account is unchanged since 2017 (80% of internet users have a profile<sup>6</sup>), however the sites they are using is changing. Facebook remains the most popular social media site, however this has decreased since 2017 (88% use Facebook, down from 91% in 2017). There has been a corresponding increase in the use of WhatsApp (61% in 2018, up from 54% in 2017) and Instagram (38%, up from 31% in 2017). When asked about their main site, again while Facebook remains the most popular, internet users are now less likely than the previous year to consider this their main site (58% in 2018, down from 70% in 2017) and more likely to nominate WhatsApp (23% vs. 16%), Instagram (5% vs. 3%) and YouTube (4% vs. 2%).

Social media allows us to connect and share information with others, but it appears that social media users are increasingly shielding themselves from opinions which differ from their own. Compared to 2017, social media users are less likely to say they see views they disagree with; a quarter say they ‘rarely’ see views on social media they disagree with (vs. 18% in 2017). As such, more social media users say they ‘rarely’ see views they disagree with (24%) than say they ‘often’ see views they disagree with (17%).

Looking at the right to anonymity online, internet users are divided; with similar numbers agreeing as disagreeing that “people

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<sup>6</sup> When expressed as a proportion of all adults (as opposed to all internet users) seven in ten (70%) adults aged 16+ have a social media profile.

should have the right to hide their identity online in order to express their views anonymously” (41% vs. 40%). However, internet users are less likely to think “it’s important people have the right to say what they want even if it is controversial or hurtful to others” (43% disagree vs. 36% agree).

### **Internet users are more likely than in 2017 to have encountered hateful content online, although most didn’t do anything about it**

Using the internet can expose people to unwanted experiences and just over half of internet users say they have concerns about the internet.<sup>7</sup> In order to explore this in more detail, we show internet users seven types of negative online events and ask them which, if any, they have experienced in the past 12 months.<sup>8</sup> More than a quarter say they have experienced any of these events. Just over one in ten say they have experienced a computer virus on any device used to go online, and fewer say they have experienced each of the other six events.

Social media can be a source of upsetting or offensive content; six in ten social media users have seen this type of content in the past 12 months and one in ten say they have ‘often’ seen this type of content.

Compared to 2017, there has been an increase in the proportion of internet users who say they have seen hateful content<sup>9</sup> online in the past 12 months (53%, up from 47% in 2017). This is driven by an increase in the proportion who say they ‘sometimes’ see this type of content (39% in 2018, up from 33% in 2017). One in seven say they ‘often’ see this type of content (the same as in 2017). However, three in five of those who saw hateful content said they ignored it or didn’t do anything about it. Of those who did do something about it, the most popular responses were to report the hateful content to the website or app (17%) and to block the person who made or shared the comments (12%).

In our Adults Media Lives study, when asked to explain what they considered to be harmful or hateful content, most participants found it difficult to define this in their own words. Most assumed that harmful or hateful content equated to the more extreme forms of online bullying or ‘trolling’. As such, only a few participants claimed to have had direct experience of such content online (although some claimed to have seen it directed towards celebrities). Perhaps unsurprisingly, these individuals had a more nuanced

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<sup>7</sup> Ofcom has conducted a quantitative online harms research project (fieldwork in Spring 2019). This research, among adults aged 16+ and children aged 12-15, explores concerns about using the internet, reported experience of potential harms (including frequency and impact) and sources of potential harms. A higher level of unprompted concern was found in our 2019 online harms research than in our 2018 media literacy research. This is probably due to a difference in the question wording (the 2019 survey prompted respondents to think about apps, social media, online gaming and video clips) and news stories relating to social media sites before and during the 2019 fieldwork. For more information, see Ofcom’s 2019 [Online harms research](#).

<sup>8</sup> The negative events shown to respondents are; a computer virus, email account or social media account hacked, online contact from someone pretending to be someone else, lost money online or victim of scam, financial or personal information stolen or used online without the user’s permission or knowledge, online bullying/ harassment/ trolling and being threatened or stalked online.

<sup>9</sup> Internet users were asked whether they had seen anything hateful on the internet that has been directed at a particular group of people, based on, for instance, their gender, religion, disability, sexuality or gender identity. They were also provided with the following explanation: Examples of these sorts of things might be cruel or hateful comments or images that have been posted on social media, comments in response to an article that you read online, or videos posted on sites like YouTube.

understanding of what such content is and were more disturbed by it.

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

*Male, 39, web officer, Cardiff*

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

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

*Male, 57, alarm fitter, Lisburn NI*

### **Despite there being high awareness of reporting functions on Facebook, Twitter and YouTube, around half of those that saw inappropriate content did not report it**

For the first time in 2018, we asked questions among users of YouTube<sup>10</sup>, Facebook and Twitter to explore awareness of and experience in using reporting functions on these sites. Awareness of reporting functions is high; four in five are aware of this functionality on Facebook and three in four on Twitter and YouTube. The proportion who have ever seen inappropriate content varies

by platform; nearly half report seeing inappropriate content on Facebook, compared to a quarter on Twitter or YouTube.

Although awareness of reporting functions is high, the proportion who have ever reported content is low. Among those that saw inappropriate content, six in ten reported it to Facebook, half to Twitter and four in ten to YouTube.

Among those who had seen inappropriate content but did not report it, three in ten of those who use Facebook and one in five who use YouTube said it was because they didn’t think the platform would do anything about it.<sup>11</sup> A quarter of Facebook and YouTube users said it was because they couldn’t be bothered.

Similarly, in our Adults Media Lives study, when asked what they would do if confronted by inappropriate or upsetting content online, many participants claimed that they would ignore it, rather than report it. For some this was because they were not overly concerned about the prospect of seeing such content; others said they were concerned but had limited confidence in the platforms in question acting on such complaints.

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

*Male, 39, web officer, Cardiff*

<sup>10</sup> Those who said they ever watched videos on video-sharing sites or apps like YouTube, Vimeo, Snapchat or Facebook were asked specifically about their awareness and use of reporting functions on YouTube.

<sup>11</sup> Base too low (<100 interviews) to show results for Twitter.

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

*Male, 20, student, Leeds*

### **Over half of internet users use strong passwords on devices used to go online, or anti-virus or anti-spyware packages**

Another area we explore in our survey is adults’ use of security measures to protect themselves and their family when going online. There are two security measures that are used at home by a majority of internet users. More than three in five use strong passwords online or on devices used to go online, and slightly fewer say they use security software such as anti-virus or anti-spyware packages, however this has decreased since 2017 (65%). This might be because new devices tend to have anti-virus software pre-installed. Just over one in ten use a virtual private network (VPN) to hide their location online.

The adoption of security measures varies by both age and socio-economic group; internet users in AB households are more likely to use security measures, while those aged 75+ and in DE households are less likely. Internet users aged 16-24 are more likely to use newer security measure such as fingerprint or facial recognition (37% vs. 27% internet users overall), however this is most likely linked to device capability.

## **Exploration online and awareness of funding of traditional media and online services**

### **A third of internet users only use websites or apps they’ve used before; this is more likely among those aged 55 and over or those in the DE socio-economic group**

Understanding the extent to which people are willing to explore online is important context for many of their attitudes and behaviours. Overall, confidence as an internet user remains high (87%), unchanged over the past two years. Despite these high levels of stated confidence, more than a third of internet users say they only use websites or apps that they’ve used before. A higher proportion (40%) say they use “maybe one or two” sites or apps that they haven’t used before and a lower proportion (22%) say they use lots of websites or apps that they haven’t used before.

The propensity to explore online decreases with age; 30% of internet users aged 16-24 say they have used lots of websites or apps they’ve not used before and this drops to 10% of those aged 55+. Those in DE households are less likely to explore online; half say they say they only use websites or apps they’ve used before, while those in AB households are less likely to say this (25%).

### **The majority of people are aware of how television programmes are funded, but they are less aware of how online services and websites are funded**

One element of media literacy is understanding how different media and online services are funded, so as to better understand the motivations of the companies or organisations providing the content on

such services. Awareness of the funding of television programmes remains high; eight in ten adults are aware of the licence fee as the main source of funding for BBC television programmes, and seven in ten are aware that advertising is the main source of funding for television programmes on the commercial stations.

While awareness of the licence fee as the main source of funding for BBC TV programmes is high, fewer adults correctly identify the licence fee as the main source of funding for the BBC website (62%). Awareness of how the BBC iPlayer service is mainly funded is lower still; about half are aware that the licence fee is the main source of funding.

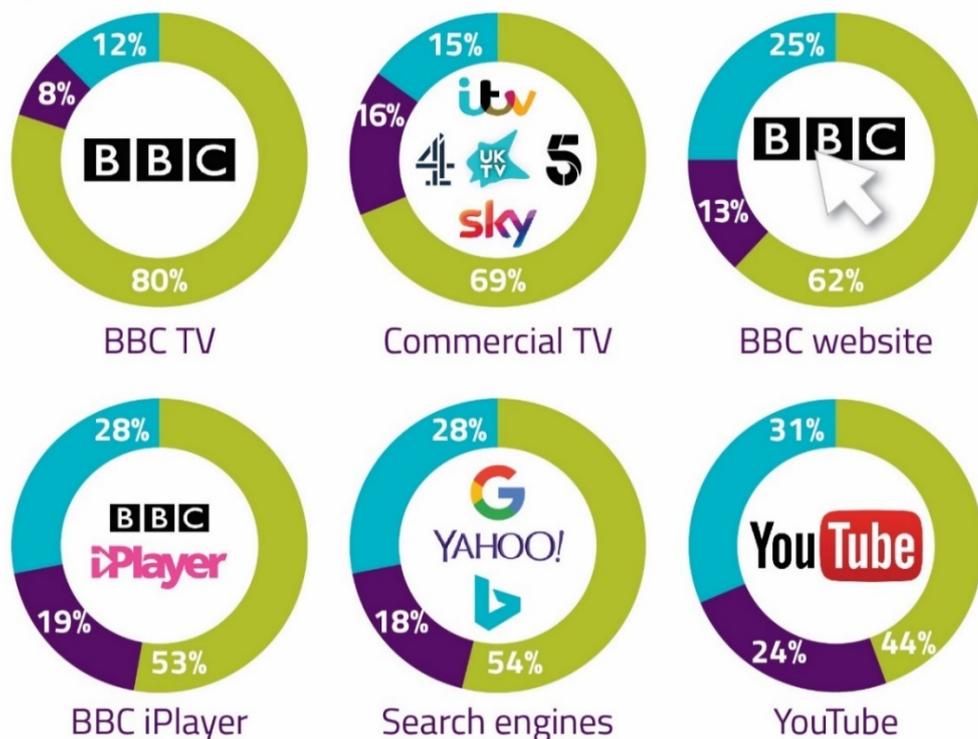
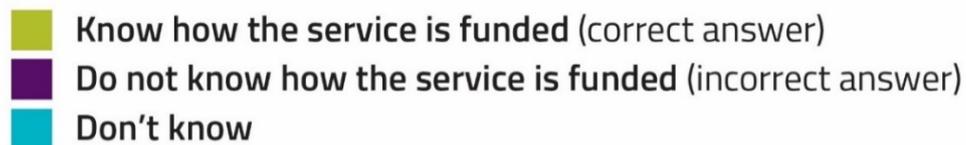
Awareness of funding of online services is lower than for funding of traditional TV

services. Just over half of adults are aware of how search engine websites are mainly funded (i.e. by advertising), and just over four in ten adults are aware that the main source of funding for YouTube is advertising.

There are clear differences by socio-economic group in awareness of the funding of media and online services; those in DE households are less likely than average to be aware of how most media and online services are funded, while those in AB households are more likely.

However, a large minority of internet users don't seem to mind who funds or owns websites; four in ten think that so long as the internet provides good websites it doesn't matter how these are funded, higher than the 35% who disagree.

### Awareness of how media and online services are funded



## Protecting personal data

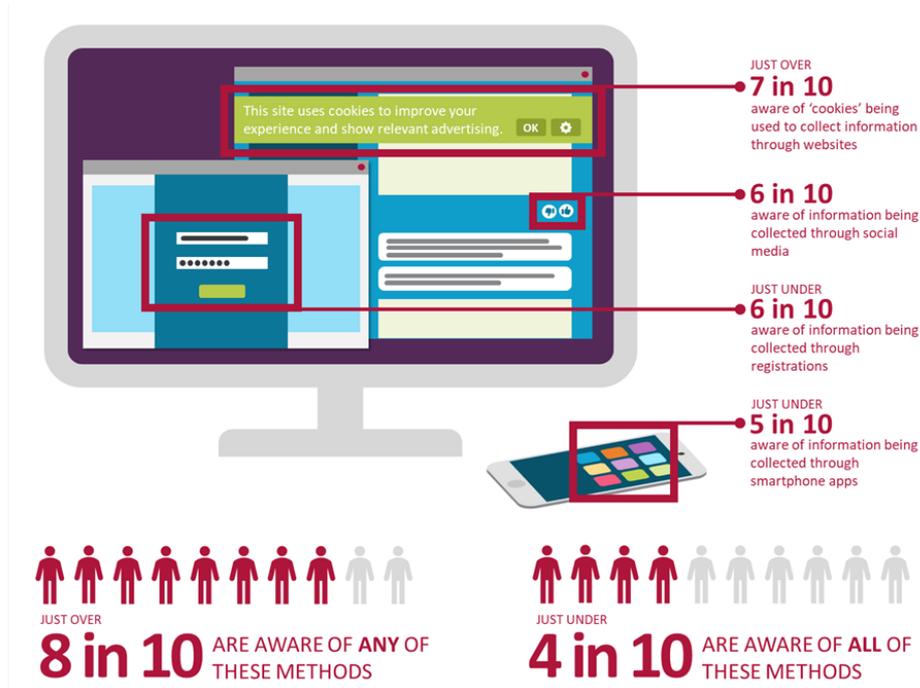
**Although most internet users are aware of at least one of the ways in which their personal data might be collected online, less than four in ten are aware of all the ways we asked about**

Three-quarters of internet users say they are confident in knowing how to manage who has access to their personal data online<sup>12</sup>.

Confidence varies with age and by socio-economic group; it is highest among internet users aged 16-24 (83%) and 25-34 (84%) and lowest among adults aged 55+(60%) and those in DE households (66%).

While there was good awareness of the use of cookies to collect information about the websites people visit and the products/services that interest them (at 70%), there was less awareness of apps on smartphones that collect data on users' locations or on what products or services interest them (49%). However, this has increased since 2017<sup>13</sup> (45%). Overall, eight in ten were aware of at least one of the four ways in which companies can collect information about what people do online<sup>14</sup>, but less than four in ten were aware of all the ways.

### Internet users' awareness of ways in which companies can collect personal information online



<sup>12</sup> Users are prompted with the following explanation: "By this I mean knowing how to stop companies from getting access to information like your personal details (like your address, phone number, date of birth etc.) or information on things like where you shop or your interests".

<sup>13</sup> In 2017 the option "asking customers to 'register' with a website or app and to opt-in/ opt out of receiving further information from them or their partners" was two distinct response codes. One referred to "receiving further information from them" and the other "receiving information from their partners or other companies". As such, no trend data is available for this particular measure.

<sup>14</sup> Internet users were prompted with the following four ways companies can collect information about people based on what they do online and asked which they were aware of: using 'cookies' to collect information about the websites people visit or what product interest them; collecting information from social media accounts i.e. about users interests, 'likes', location, preferences; asking customers to register with a website and opt in/out to receiving further information from them of their partners and; using apps on smartphones to collect data on users' locations of what products and services interest them.

Companies use terms and conditions to explain how they use personal data. However, seven in ten internet users agree that they usually accept the terms and conditions online without reading them, and the same proportion of social media and messaging site users say this about social media sites.

Although a large minority of internet users are not happy for companies to collect and use their personal information, there are increasing levels of acceptance if it benefits them. For example, connecting to a free service like public wi-fi (22% vs. 13% in 2017) or if they get a personalised service like a weather update (15% vs. 8% in 2017) in return. However, levels of acceptance are reducing towards personal information being used even if they can choose to opt-out at any point (30% vs. 35%) and if companies are clear about how their information will be used (29% vs. 33%).<sup>15</sup>

In our Adults Media Lives research we found that there was an increased awareness and sensitivity about the collection and use of personal data. Facebook's part in the Cambridge Analytica data leak (as well as a further Facebook data breach which occurred during the fieldwork period) appear to have had a lasting effect on user confidence. As a result of such concerns, some participants described themselves as being more careful about how they now share their data (e.g. when they sign up to public wi-fi).

*"The stuff about Cambridge Analytica makes me come to the conclusion that any organisation which uses the internet... is going to collect data because they can sell it, and they're going to analyse it, either for their own use or because they can sell it on... I was particularly concerned when I read about the data and information leak from Facebook a few days ago... I assume that because I don't use it I'm not one of the vulnerable ones, but who knows?"*  
*Male, 74, retired, Warwick*

*"I went to Frankie and Benny's the other day and you had to put your personal information in to access the internet. I used to put my own information in and not think twice about it, date of birth, everything. Then I started thinking 'Why do they need that?'... So I started putting in fake email addresses, fake date of birth, fake names."*  
*Female, 26, student, Edinburgh*

### **Three in ten internet users aren't making 'appropriate' or media-literate checks before entering their personal details online**

It's almost inevitable that internet users will, at some point, need to submit their personal details online; for example, to sign up to a service or to buy something. We ask internet users whether they make any checks, or take any specific actions before submitting details online, to protect their personal data; these are classified as 'appropriate' (media-

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<sup>15</sup> For more information on use of personal data including what information online services collect about users and how, see User Data section in Ofcom's [Online Nation report](#).

literate)<sup>16</sup> or; ‘less appropriate’ checks or not making any checks<sup>17, 18</sup>

Overall, two-thirds of internet users make at least one of the ‘appropriate’ checks (unchanged since 2016); more than three in five say they check to see whether the site looks secure before registering their details online, while just under half say they check whether they are familiar with the company or brand.

However, three in ten internet users say they make one or more of the ‘less-appropriate’ checks or don’t make any checks at all (higher for those aged 16-24, 37%). Around one in seven would register their details if it was the only way to get the product or service they wanted or would rely on checking whether the site was listed by a search engine. Five per cent say they tend to enter their personal details whenever they are required, although this is less likely than in 2017 (7%).

## Critical thinking; awareness of advertising and evaluating online content

**There has been little change in critical awareness in the past few years, with many still lacking the critical skills needed to identify when they are being advertised to online**

Critical thinking, or awareness, is the skill that enables people to assess and evaluate their media environment; an element of critical thinking is the ability to recognise what is a commercial and what is an editorial message online. Our survey shows that more than four in five internet users say they are confident that they can identify online advertising, as in 2017. However, only half of search engine users correctly identify advertising on Google and understand that this is the only reason the results are displayed (unchanged since 2015).<sup>19</sup> Those in DE households are less likely to only give this correct response (37%), whereas those in AB households are more likely (57%).

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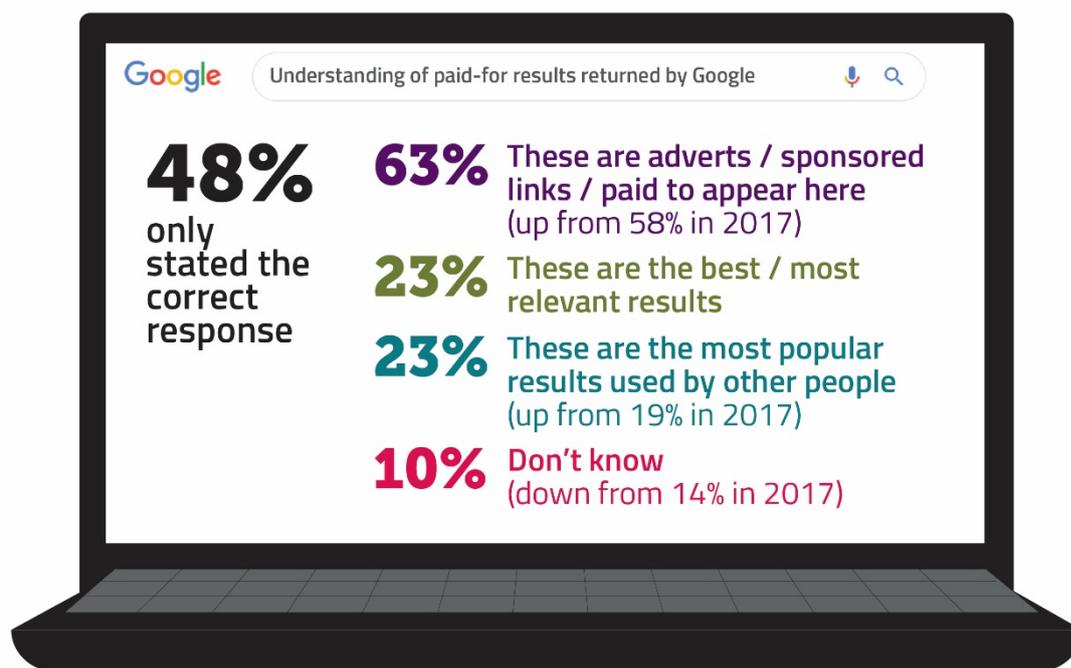
<sup>16</sup> ‘Appropriate’ checks include; checking if the site looks secure (padlock symbol or https), if familiar with the company or brand, if there is another reputable service like PayPal, if there is a guarantee personal details won’t be shared with anyone else and if the site is recommended by friends and family.

<sup>17</sup> ‘Less appropriate’ checks include checking if the site is listed by a search engine. Not making any checks includes; entering personal details if it’s the only way to get a product or service wanted or entering details whenever required.

<sup>18</sup> Four per cent of internet users spontaneously mentioned that they never registered with websites/ entered their personal details online, so have been excluded from the results shown.

<sup>19</sup> Search engine users can select more than one response to this question, 48% is the proportion of those who give only the correct response and do not select either of the other options.

## Search engine users' understanding of paid-for results returned by Google searches



Awareness of personalised advertising is unchanged since 2017 and potential vlogger endorsement since 2016: six in ten internet users recognise that some people might see different adverts to the ones they see, and three in four users of video-sharing sites are aware that the vloggers/ influencers might be being paid by the company to say favourable things.

Internet users have mixed attitudes towards online advertising; more than a third dislike all online advertising, a quarter say they don't mind seeing 'any' online ads and close to four in ten don't mind seeing them as long as they are relevant to them.

### **Two-thirds who use price comparison websites are unaware that the deals listed first on these sites might be paid-for content**

Price comparison websites can be a useful tool to help consumers get the best or cheapest deal to suit their needs. Close to two in five internet users have used a price comparison website to look for information

about household communication services; those in DE households are half as likely to have done this than those in AB households (24% vs. 50%).

On some price comparison websites, the deals listed first are paid-for content, or advertising. A third of adults who go online and have ever used a price comparison website are aware of this; this means that two-thirds are *not* aware that the deals listed first might be paid-for content. As with use of price comparison websites, there are differences by socio-economic group in awareness of advertising on these websites; users of price comparison websites in DE households (25%) are less likely than average to be aware, and those in AB households (43%) are more likely.

### **Despite almost all internet users using search engines to look for information online, only six in ten understand that not all the websites returned will be accurate and unbiased**

Search engines are by far the most popular source when looking for information online,

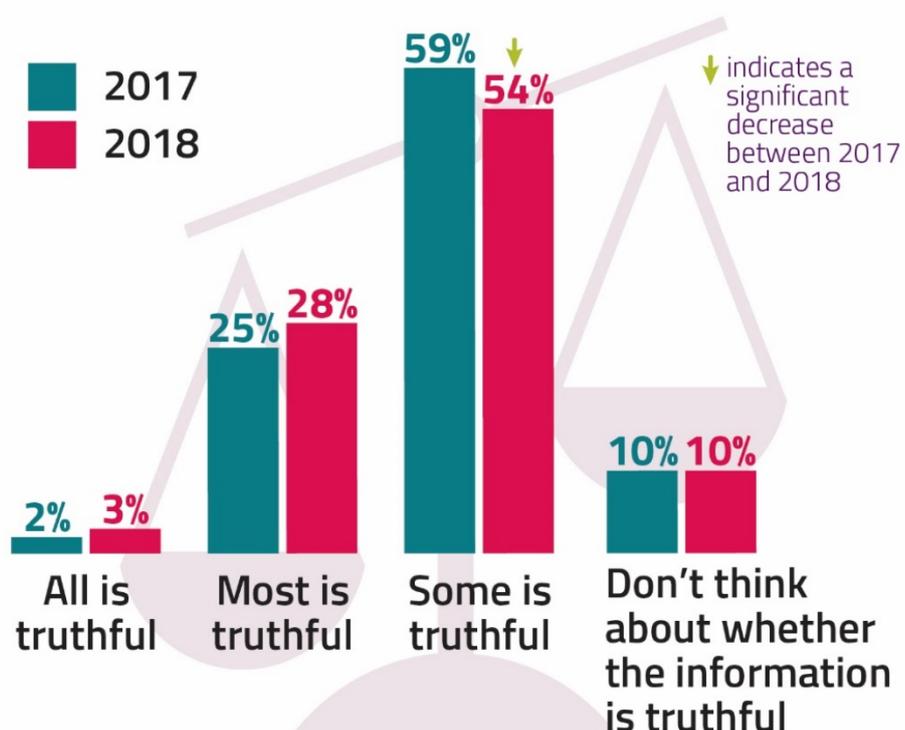
used by 94% of internet users. Six in ten search engine users think that some of the websites returned will be accurate or unbiased while others will not be (unchanged since 2011); in other words, a response that shows a level of critical understanding or awareness about the provenance of content. However, one in five think that if the results are listed by the search engine, the websites will contain accurate and unbiased information, and 17% don't think about the accuracy of the information in the websites returned, they just use the sites they like the look of.

As we saw with awareness of funding and online advertising, there are differences by socio-economic group; search engine users in DE households (46%) are less likely to demonstrate a critical understanding of search engine results, while those in AB households (65%) are more likely.

**One in ten internet users don't think about the truthfulness of online content, although those who do are more likely than in 2017 to make checks to verify the information**

Being able to judge the truth and accuracy of different sources of online content is another key critical thinking skill. Over half of internet users say they consider 'some' of the factual information they find online to be true, showing a degree of critical understanding, although this response is lower than in 2017 (59%). Three per cent of internet users consider that 'all' the factual information they find online is true and, as in 2017, 10% of internet users do not consider whether the factual information they find online is truthful or not.

**Internet users' belief in the truthfulness of factual information they find online**



However, internet users who do consider the truthfulness of online information are more likely than in 2017 to check this information (72% vs. 67%). This is attributable to users in 2018 being more likely to check the credibility of the information, for example the author's name, or a link to the original publication (28% vs. 23%). Almost half of those who consider whether the information they find online is truthful would check different websites to see if the same information appeared on them all; this was the most popular check.

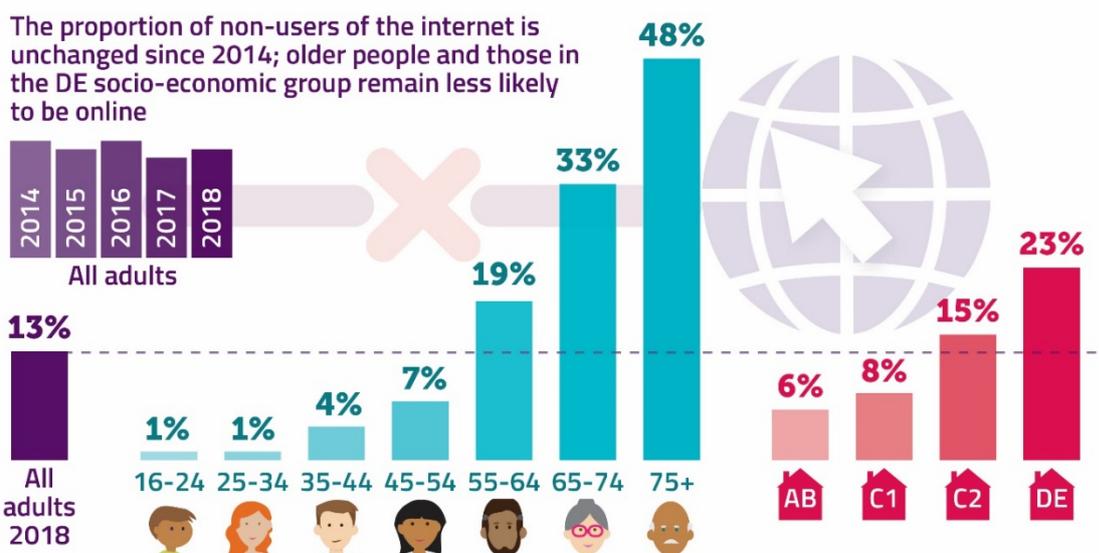
Although close to one in five social media users say they would not tend to check the truthfulness of news articles, this is less likely than in 2017 (23%). Seven in ten said they would make at least one check; the most popular was to assess whether the source of the article was either a known or a trustworthy organisation (46%), followed by using a 'peer-based' judgement, either by looking at what others had said about the story, or by assessing whether the person who shared the story was trustworthy (37%).

## Digital exclusion and demographic differences

**Thirteen percent of adults do not use the internet, unchanged since 2014; those aged 55 and over and in the DE socio-economic group remain less likely to be online**

It's important to note that despite the omnipresent nature of the internet for many UK adults, 13% of adults in the UK do not use the internet and this proportion has not changed in the past four years. Understanding who these people are and why they are not using the internet can highlight whether a section of UK society is being digitally left behind, and what are the barriers to take-up. The proportion of adults who do not use the internet increases with age; until almost half of those aged 75 do not use the internet, and varies considerably by socio-economic group; about a quarter of those in DE households do not use the internet.

### Proportion of UK adults who do not use the internet



In order to understand the barriers to take-up, we ask those who do not use the internet their reasons for not going online; more than half say they do not see the need or “it’s not for people like me” or they are not interested. Just over one in five mention a reason for non-use relating to it “being too complicated” while 15% mention a cost-related reason.

Despite the opportunities the internet provides – such as connecting with friends and accessing online services – seven in ten who do not use the internet say that nothing would encourage them to go online in the next 12 months. However, almost a quarter mention something that would encourage them to do this; the most popular reason is to buy something online (10%).

Proxy use of the internet - i.e. people asking someone else to use the internet on their behalf - can be a way for those who do not use the internet to access online services without needing to go online themselves. More than two in five who do not use the internet have asked someone else to use the internet on their behalf in the past year. The most common reason was to buy something (28%), followed by 12% saying it was to access information (other than public service information).

**In addition, the proportion of newer internet users has decreased since 2017, therefore the digital divide isn’t reducing**

‘Newer users’ are defined as those who first went online less than five years ago. Five per cent of all internet users are newer users<sup>20</sup> – down from 7% in 2017, and there is a higher incidence among those aged 65-74 (15%) and adults in DE households (9%).

Compared to ‘established’ internet users (those who first went online at least five years ago), newer users’ self-reported confidence as an internet user is much lower (55% vs. 89%).

Newer users also use devices differently to established users; they are more than twice as likely to never use a computer to go online (65% vs. 31%). A quarter of newer users only use a tablet to go online (vs. 3% for established users) and around one in five only use a smartphone to go online (vs. 11% for established users).

Newer users tend to be less likely than established users to possess critical awareness of media and online services. For example, they are less likely to be aware that the results returned by search engines may contain inaccurate or biased information (38% vs. 60% for established users). And in relation to verifying factual information online, while more than half of newer internet users say they would make at least one check, they are less likely than established users to do this (55% vs. 73%).

**When those aged 55 and over and in the DE socio-economic group do go online, they are more likely to be narrow internet users**

Understanding who is at risk of being digitally left behind isn’t just about understanding who is not online; it also relates to breadth of use of the internet. As such, it’s important to understand the proportion of narrow internet users in the UK and who they are. Narrow users are defined as those ever carrying out up to four of the 15 types of online use we ask about.<sup>21</sup>

<sup>20</sup> Base of newer users under 100 (97), so results should be treated as indicative only.

<sup>21</sup> Medium users ever carry out between five and nine types, and broad users ever carry out between ten and 15 types. The 15 types of use are: email; transactions e.g. online shopping, trading/ auctions; communicating

Narrow users account for 28% of all internet users and have the same demographic profile as non-users; they are more likely to be aged 55 and over (34% for 55-64s, 41% for 65-74s and 54% for 75+) and in the DE socio-economic group (42%).

**One in seven adults of working age in DE households do not use the internet, and when they do, one in five only go online via a smartphone**

Given the high proportion of older people in the DE socio-economic group, we used our survey data to conduct additional analysis among working-age adults (16-64 year-olds) to explore whether the differences in going online, and in levels of critical understanding, are driven by age, socio-economic group or both.

Our analysis revealed that working-age adults in DE households are more than three times as likely as those in non-DE households to not use the internet (14% vs. 4%), showing that differences in non-use of the internet are driven both by age and by socio-economic group. When adults of working age in DE households do go online, more than two in five never use a computer to do this (vs. 29% in working-age non-DE households). And adults of working age in DE households are twice as likely than those in non-DE households to only use a smartphone to go online (21% vs. 10%).

Differences in confidence online and critical understanding also appear to be driven both by age and socio-economic group; working-age internet users in DE households continue to be less confident users than those in non-DE households (84% confident vs. 92%). Adults of working age in DE households are less likely than those in non-DE households to correctly identify the source of funding for many media and online services. And working-age search engine users in DE households are less likely than those in non-DE households to understand that the results returned by search engines may contain inaccurate or unbiased information (46% vs. 63%) and to be able to correctly identify advertising on Google (37% vs. 51%).

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via instant messaging; banking/ paying bills; social media; finding/ downloading information for work/ business/ school/ college/ university/ homework; accessing news; find information on health-related issues; watch short video clips; using local council/ government sites e.g. to find information, to complete processes such as tax returns, to contact local MP; listening to radio or streamed audio services; watching TV programmes or film content online; remote access e.g. accessing files through a cloud service, remotely control TV services at home using an online device, remotely control or monitor household; uploading or adding content to the internet e.g. photos, videos, blog posts; and playing games online or interactively.