Media Lives: Wave 9 (2013)

Summary Report

Research Document

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Section 1

Introduction to the study

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

This nine-year ethnographic video study has tracked the evolution of people's relationships with digital media – how it fits into their lives, what motivates them to adopt new technology and learn new skills, their usage habits, levels of understanding, issues and concerns about media.

Each participant is interviewed in-home and at length (each interview lasts around 90 minutes), which allows for a full exploration of the relevant issues and for demonstration/ observation of media use *in situ*. Nine waves of research have now been conducted; the first was in February 2005, with subsequent waves in October 2006, 2007, 2008, 2009, 2010, 2011 and 2012. The most recent interviews took place between 14 October and 11 November 2013 and were conducted by Mark Ellis, Tony Harbron and Tony Palmer of The Knowledge Agency.

The number of participants in the study is relatively small – between 12 and 18 each year – 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. Five of the 17 participants in the latest round of interviews have been part of the study since the start, and six more joined the study in 2006. As the profile of the sample becomes, by definition, progressively older, we have regularly recruited new participants at the bottom end of the age range; this year, a 15-year-old school student from rural Yorkshire.

Certain subjects (many of which have been subject to great change over the nine years of the study) have been tracked consistently each year, such as:

- Acquisition of new media hardware (PVRs, DAB, etc.) and media (e.g. web) skills, confidence in use of digital media, and adoption of new online activities (e.g. social networking)
- Use of mobile devices to consume content
- Sources of knowledge and information about media, and methods of learning new skills
- Trust in media providers across different media
- Concerns about privacy, security and safety

However, the research model is flexible enough to explore specific topical issues each year, for example (in 2013) attitudes to online etiquette, streaming video services and nuisance telephone calls.

All interviews have been filmed, and the video is the main vehicle for the presentation of findings from the research. Each year's debrief is a 'living documentary' featuring extensive themed montages of participants talking about key issues – more than an hour of video in each presentation.

In addition, the key insights from each individual interview have been clipped and catalogued by theme, platform and participant, each and every year of the study. The cumulative databank of over 2,500 video clips now represents a uniquely rich and detailed resource for exploring and communicating the evolution of people's 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.

Section 2

Overview

Media Lives is a qualitative survey designed to complement Ofcom's large-scale quantitative audit of media literacy in the UK. The number of participants in the study is small – between 12 and 18 each year – and so is not *statistically* representative of the population as a whole. However, these participants have been chosen carefully to reflect a broad cross-section of the UK population in terms of age, location, ethnicity and social circumstances.

This is the ninth wave of the Media Lives study, and over the nine-year period we have seen online media steadily grow in importance for our participants. In particular, over recent waves, mobile internet has played a greater role in many participants' lives, to a point where, when asked to name their 'essential' service or device, most cited their smartphone, because it is able to fulfil the functions (to varying degrees) of all other forms of digital media and communications hardware.

Although few participants are spending more time web browsing, social networking etc. at the expense of 'traditional' media such as television and radio, in practice the increased use of streaming and/or on-demand services to access this type of content does mean that most are spending significantly more time online overall.

Another by-product of the proliferation of connected devices within participant households with access to digital media content is that consumption of video and audio content continues to become more fragmented and personalised. This is driven in part by the accessibility of traditional broadcast channels (or their on-demand services) on computers, smartphones and tablets, and in part by the increased availability and adoption of online-only TV and radio-like services such as Spotify and Netflix.

Participants' claimed consumption of news has been affected greatly by this fragmentation. For most, broadcast news bulletins are much less important than they once were, as there is now much more choice both between and within platforms. Participants are exercising this choice in diverse ways, either to access mainstream news where and when it suits them, and/or to enjoy a more tailored diet of news focused on the areas which most interest them.

Fragmentation and personalisation can present particular challenges for parents in our sample, who find it increasingly difficult to monitor or police their children's use of digital media - there is less shared viewing, and their children are increasingly likely to have access to their own portable connected devices.

In this wave of fieldwork we have not seen any major changes in *attitude* across the sample towards issues of privacy and security, although in terms of *behaviour* some participants described themselves being more open, in what they share through new social media platforms like Instagram and Twitter, than they were previously with their private Facebook accounts. One participant had been the subject of abuse, both on Ask.fm and Twitter, and others claimed to be concerned about the twin risks of offending other people and receiving abuse from strangers on these platforms, as well as on other open fora such as review sites. This was one stated reason why many of our participants choose to be (in their own words) "consumers, not contributors" to such services.

A consistent theme across all waves of the study has been the influence of life-stage, and other changes in domestic circumstances, on participants' media use and media literacy needs. This is particularly true for our younger participants, who are the most likely to experience significant changes in their life-stage and/or their domestic circumstances from year to year, as they leave school for university, get their first job, move out of (or back into) the parental home, get married, have children etc.

For example, one of our participants – a newly qualified doctor – is now working for the first time, and this has had a major impact on her availability to consume media, and the priorities she places upon the different options available to her. Another, a young father who has recently split up from his partner, has moved back into his parents' home. This has had a significant impact both on the availability of services to him, and his ability to pay for content and services. As a relatively new father, moreover, his attitudes towards social media have evolved as he has become a concerned parent, rather than a self-focused user.

At the same time, these young participants have a strong intrinsic interest in new media devices, and are the most likely to embrace new services – most notably, in the past year, new forms of social media including Instagram, What'sApp and Snapchat. Consequently, their behaviour is very fluid from year to year.

Cost of living has also begun to play a more significant role in participants' uptake and use of digital media services. For example, this year several participants reported having reduced their pay-TV packages in order to save money, and others said they had taken advantage of bundled TV and telecommunications services which had enabled them to save money.

Concern about the higher and/or unpredictable costs of mobile data was described as a barrier to some participants signing up for the new 4G mobile services. This is one manifestation of a bigger issue participants have with mobile data; because it doesn't lend itself to simple measures like minutes talked, or numbers of text messages sent, most participants find it extremely difficult to know how much data they need, or are using. This has led to several participants having problems with unexpectedly high bills.

Nevertheless, when there are sufficiently motivating products and services, many in the sample do appear to be prepared to spend considerable sums of money on new media technology and services. Most participating households now have at least one tablet, and this fieldwork took place before the anticipated Christmas 2013 boom in tablet sales.

Whereas in earlier waves of the study there has been a clear distinction between digital media' haves' and 'have-nots', largely determined by participants' ability to access the internet, all of our participants are now online at home. Now that there are more diverse and in many cases, more sophisticated digital media hardware options available to participants, the nature of digital exclusion has evolved.

The advent of smart TVs, smartphones and tablets has blurred and complicated the roles of digital media devices, and some participants find this confusing, especially given the current rate of technological change. This is most apparent when it comes to making purchase decisions about new hardware – even for individuals who are relatively confident and proficient users of digital media through 'traditional' devices such as PCs and set-top boxes. Having all now embraced the online revolution to varying degrees, re-learning media literacy skills for a new generation of multi-functional devices is likely to be the next major challenge facing our sample.

Section 3

Television

3.1 More options for on-demand viewing has led to some participants viewing less live TV than before

We have witnessed a long-term trend, over several years of the study, towards greater levels of on-demand viewing among the sample. This was initially driven by the availability of new services such as Sky Anytime, BBC iPlayer and, more recently, Netflix and Lovefilm Instant. More recently, the availability of new hardware, which makes viewing on-demand content more practical and/or pleasurable, seems to have accelerated this trend within our participating households.

This is in part fuelled by more television sets being connected to the internet, either directly (smart TVs) or via a games console, Apple TV or similar. (It should be noted, however, that the incidence of smart TVs among the sample actually went *down* in 2013.) The rapid growth in penetration of tablets (and specifically iPads) within the sample is also a factor. Many participants claimed that watching on-demand content on a tablet is much preferable to viewing the same content either on a smartphone or a laptop.

"I have watched a fair amount of catch-up TV on my iPad. That is born of convenience and the fact that my TV doesn't have that kind of [internet] access at the moment. There have been a few shows I've been interested in, and I've just ended up watching them in bed with the iPad on my lap."

Male, 30, banker, London

3.2 Viewing is becoming more fragmented within households as streaming to mobile devices via WiFi personalises the viewing experience

One by-product of the growing incidence of devices within participant households capable of streaming on-demand programming is that participants report increased levels of solo viewing. Watching television appears to be becoming a *less social* experience for this sample, as different individuals consume different content, sometimes even within the same room.

"I've got Netflix on my mobile phone. I just watch that all the time now. It has ruined my social life... Me and my boyfriend will sit together on the couch watching Breaking Bad on our phones... not talking to each other, just sitting next to each other with our headphones on."

Female, 21, civil servant, Edinburgh

3.3 Pay TV now represents a major outlay for some households, and there is evidence of ‘belt-tightening’ among the sample

Although the research fieldwork this year took place against a backdrop of further cuts in public spending, there was no evidence of the economic situation directly affecting the participant households (e.g. redundancy) as it had done in previous years.

Nevertheless, some participants did say they had cut back on pay-TV services (e.g. Sky), either completely, or replaced with cheaper alternatives, as a means of saving money.

“We had to get rid of Sky Sports and the movies because my daughter is getting married next year and we’re trying to save some money, with me not having work at the moment... All being well we’ll get it back again in a year’s time.”

Male, 52, unemployed, Lisburn, Northern Ireland

3.4 Streaming services such as Netflix have become more prominent over the past year

Several participants are now subscribing to Netflix or Lovefilm Instant, and others within the sample say they are considering doing so.

The availability of both new and classic TV series, and films, has added depth to the appeal of these services for these new subscribers; participants described using them more as an alternative to DVD box sets than as an alternative to traditional television or on-demand viewing.

“We ended up watching the whole two series of Twin Peaks. It was a different way of watching things because you could just watch one every night as opposed to waiting until a certain time the following week for the next episode.”

Male, 34, web officer, Cardiff

Although one participant has got rid of his Sky subscription in favour of Freeview and Lovefilm Instant, in the majority of cases these services have been taken on *in addition to* participants’ existing pay-TV contracts. (It is worth noting, however, that the participants who have subscribed to streaming services do not currently subscribe to premium sport or film channels; they sometimes describe the streaming services as a more affordable alternative to (e.g.) Sky Movies.

3.5 Multi-tasking and ‘second screen’ activity varies significantly across the sample

Most of the sample multi-task extensively. Most commonly, they describe themselves using their phone, tablet or laptop with the TV playing in the background. However, a variety of different combinations of media are employed, especially by younger participants.

In the majority of cases and for the majority of participants, however, this multi-tasking is *not* directly related to what is being viewed, in spite of the current trend towards television programmes promoting ‘second screen’ activity. Indeed, when pressed on this, most participants described their use of the second device as being a symptom of less, rather than more, engagement with the programme being broadcast at the time.

"Because of the kind of television viewing I'm doing these days, to on-demand services, I don't tend to think of interacting with live TV. My use of the second screen is more for other activities. I guess that might be a sign that I'm slightly bored by what I'm watching, and want other distractions."

Male, 34, web officer, Cardiff

There were exceptions, of course. Some of the younger participants *are* engaging with programmes more regularly on their 'second screen' – in particular discussing talent shows, dramas and docu-soaps on social media as the programmes go out live.

"With programmes like *The Only Way is Essex* and *Made in Chelsea*, programmes for young people, Twitter just goes mad. When it was the finale of *Breaking Bad* <u>everyone</u> was writing about it on Twitter."

Female, 21, civil servant, Edinburgh

Section 4

Radio

4.1 Increased penetration of digital radio listening options across the sample has led to increasingly eclectic patterns of *consuming* radio content

Most participants (ten out of 17 participants in total) now have at least one DAB radio set in their household, and the vast majority (15) claim to listen to digital radio on at least one platform. As well as DAB, this includes listening via digital television, tablet and smartphone apps (e.g. Sky Sports News Radio and TuneIn Radio).

"I've got that TuneIn radio app on my phone, you can tune in to absolutely anything radio-wise. I just listen to that on the way to work at 4 o'clock in the morning. I don't want to listen to music or anything too upbeat, so I can just put, like, TalkSport on and listen to that."

Male, 24, warehouse worker, East Barnet

Much of participants' reported listening is now via digital platforms (other than in-car listening, although even here we had the first reported instances of participants with DAB in their car). However, unlike television, most of this radio listening is still live. There was little reported use of on-demand or catch-up radio listening, or listening to podcasts.

"Mainly I'm listening to Radio 4… the Today programme in the morning, PM in the evening, sometimes the comedy at 6.30… Very occasionally I will listen back to a programme that I've missed, on the iPlayer."

Female, 44, arts fundraiser, Warwick

Section 5

Internet

5.1 The newest converts to the internet in the sample are steadily learning to engage with a range of activities

The oldest participant in the sample (aged 80) went online at home for the first time this year, and another participant (aged 69) has been online for a little more than a year.

These new converts to the internet are steadily learning to engage with a range of activities online, including communicating, shopping and undertaking research into topics of interest (such as holiday destinations). This mirrors the pattern we have seen with late internet adopters in earlier waves of fieldwork. Small successes breed confidence, and users slowly start to undertake more ambitious tasks over time.

"I was going on holiday and I was using it [the internet] to browse apartments and bungalows in a particular area, and I found it very, very helpful, plenty of information and feedback… I wish I'd got a computer earlier in life."

Female, 80, retired, Coventry

5.2 Participants' main online activities are much the same as before, but many are doing these things in different ways

In earlier years of the study, we saw the emergence of new activities online; for example, the use of social media and online streaming of audiovisual content. This year, however, there have been no major new developments in the ways in which participants are using the internet.

Communicating, social networking, shopping, research and planning are still the main tasks undertaken online by participants in the study. However, we did see significant changes in relation to:

- the emergence of influential new sites and services (such as Instagram) and the increased prominence of specific online brands (e.g. Mail Online); and
- participants accessing the internet via a broader mix of locations and devices, driven both by the penetration of new hardware (e.g.tablets) and the increased incidence of mobile internet and smartphones.

5.3 Progress towards greater digital literacy is not always smooth

Because the learning curve for digital media literacy is set against a backdrop of ever-evolving hardware and services, individual participants' progress is not necessarily smooth or linear. While on the one hand, the touch-screen interface of a tablet (for example) has encouraged some participants to become more active online, bypassing their fears of the keyboard and mouse, others have found the transition from traditional computer to mobile device problematic. Having surmounted problems in learning how to master ICT once, they are now finding they encounter similar problems in a different guise.

"I did take it [a tablet] up to someone I know who has got these most lovely tulips… and I think I was a bit flustered, I couldn't make it work… all I got was pictures of myself, and I thought 'What's going on… it must have run out of battery'… I just panicked."

Female, 77, retired, Bucks

5.4 The internet is now offering more than convenience

As well as changes in the ways in which participants are accessing online content and services, there appears to have been a subtle but significant shift in the way in which participants describe the *impact* of the internet on their lives.

In the first few years of the study, going online was described as an activity in its own right. 'Going online' was something that you did, in the same way as 'watching TV' or 'listening to the radio'. More recently, participants describe the internet more as a facilitator or a utility – a different and usually more convenient way to conduct tasks which were previously done in another way.

Now it is clear that for many participants the internet is offering more than convenience – it is providing benefits and creating opportunities that were not previously available to them, for example:

- Allowing people whose mobility is limited by age, disability or illness to have easy access to (e.g. health) information, to communicate with family and friends, and to do their shopping.
- Allowing people who live in remote rural locations to access banking and other services (the availability of which, in 'bricks and mortar' form, has declined over the course of the study).
- Allowing participants to make real-world social links with other people (e.g. via Meetup groups or dating sites).
- Allowing families to research (e.g.) places to live and potential schools in much greater depth than would have previously been possible.
- Creating opportunities to pursue different, or secondary, career paths (for example, the wife of one of our participants has set up a new online business based on her hobby of distressing furniture).

"My grand-daughter was staying here, she's eight, and she was able to speak to her dad – who was away working in Chile – using Skype. That's one of the great pluses of the computer, being able to communicate with people abroad."

Female, 80, retired, Coventry

“**We thought we’d have a go at developing properties, so I’m spending a lot of time on there at the moment, researching values, areas, selling prices... that sort of thing. That’s what takes up most of my time on the internet at the moment.”**

Female, 36, fundraising manager, Cardiff

5.5 Most of our participants are ‘consumers rather than contributors’

Although many participants are making extensive use of user-generated content online (see 4.8 below), very few are active contributors of such content.

This is often ascribed to a lack of time, or in some cases inclination, but some participants do have concerns; either about privacy issues or about exposing themselves to abuse if they post material online. To some extent, the experiences of the participants who are more proactive justifies these fears.

Our youngest participant (and newest recruit) is much more active and visible as an online contributor than most of the other participants – even those just a few years older than him. He is very active as an individual on social media with his friends, he contributes pseudonymously to various fora and to a shared Twitter account focusing on his love of football.

This activity has exposed him to a number of problems:

- Both he, and some of his friends, have been victims of cyber-bullying while using Ask.fm. (As a result of this, he has deleted his Ask.fm account.)
- While tweeting about football-related issues, he has been subjected to aggressive ‘trolling’ by fans of rival clubs.

“About a year ago someone posted something really abusive about me [on Ask.fm], saying ‘You’re ugly and spotty and no one likes you’ and so on. It’s really irritating because they can do it anonymously so you don’t know who said it. I’ve heard of people killing themselves, and awful things like that... It’s just wrong.”

Male, 15, student, rural Yorkshire

5.6 Growth in use of Twitter/ Instagram/ Snapchat

Younger participants in the study claimed to be using Facebook less than before. This was attributed in part to frustration with Facebook itself, and in part to the availability of new alternatives.

There has been some growth in the use of Twitter among the sample over the past year. It continues to be used in very different ways by different participants. For some, it is still primarily a way of accessing celebrity chit-chat, for others it has become either a platform for chatting with their friends, or a serious source of news and other information.

“Twitter can be a good way to garner very good information very quickly. You now see Twitter stories being the starting point, the catalyst for headline stories on the

news that evening, so it's got a credibility that I don't think it had, or at least was an underground element, when it first started becoming popular."

Male, 30, banker, London

In the past year we have also seen significant uptake of Instagram among our sample. Five of the 17 participants now say they use Instagram, none of whom were doing so a year ago. It was praised for being current and youthful, more single-minded than other social networks (without the distracting extra features), more immediate and fun, with less potential for offending or upsetting people.

Several of the younger participants described themselves now using a combination of Twitter for discussion and Instagram for photo-sharing as the mainstay of their social media activity.

"Instagram is more about photos of yourself and other people. Twitter is more about your opinions or what you're doing... discussions with your mates… just anything that comes into your mind, really. I don't use Facebook anywhere near as much as I used to."

Male, 15, student, rural Yorkshire

In addition, three participants reported using Snapchat, at least occasionally, as a means of communicating with friends. They described the 'fun factor' of having messages with a limited life. But there is also a more serious side to Snapchat's appeal; it addresses concerns felt by some participants about material posted on other platforms remaining accessible on the internet for ever.

"Snapchat... it's the app that you take a photo and you send it to people and you can choose if it lasts - I think - 3, 5 or 10 seconds so the person opens it and they can see it for that amount of time and then it deletes forever... it's about sending really stupid things that you would never normally send.. you can put captions and write things and they're usually really funny and things you wouldn't send normally... [With other social media] if I was going to apply for a job, all somebody's got to do is type my name in and everything I say comes up…"

Female, 21, civil servant, Edinburgh

5.7 Issues of online etiquette are becoming more prominent and relevant

In the months leading up to the research there was a lot of media attention around the issue of online etiquette, and in particular the phenomenon of Twitter 'trolling'. A number of high-profile women, in particular, had been subjected to very aggressive abuse on social media, and a debate took place in the media about the need to balance an individual's right to express themselves freely and/or anonymously, with the rights of the 'victim' to protection and/or redress. Not surprisingly, therefore, this was a topic of real concern to some participants.

Most participants claimed to be careful about how they communicated online, although some acknowledged that it is easy to forget that a platform like Twitter is an open forum, and that 'banter' with their friends may not always be suitable for a broader audience.

"You very quickly realise that communication online is far more sensitive, and you have to be very careful about what you say and how you say it because it can be misconstrued very easily. I don't tend to post much online for that reason. Again I tend to be a consumer rather than a contributor."

Male, 27, planning assistant, Stevenage

There was general acceptance across the sample that 'trolling' is an inevitable although unwelcome fact of life today. However, there were more mixed views about the implications of this, and in particular how much freedom of speech should be allowed. Parents tended to be especially concerned about the *impact* of such posts – more than they were about the personal freedom of an individual to post what they like.

"I think it's always going to happen. it doesn't matter what it is. As long as there's some way to have interaction there are always going to be some people who don't like each other, some form of bullying. When I was younger it was on MSN, then Facebook, then Twitter, whatever."

Female, 21, civil servant, Edinburgh

Some participants drew a distinction between *celebrities*, whom they considered to be 'fair game' because they use social media to further their careers, and 'normal people' (for example, teenage victims of cyber-bullying) to whom they felt a greater degree of protection should be offered. (This mirrors attitudes expressed in last year's fieldwork in relation to media intrusion such as phone-hacking.)

Several participants suggested that user anonymity lies at the heart of the problem, and that the removal of the right to anonymity might resolve most of the issues.

"Because they can hide behind a username, the police have to go through systems to eventually get to that person. They will get them, but it's time-consuming. But if they had to say 'my name is XXX and I've called this geezer whatever', they can find them, as opposed to this geezer hiding behind a computer making remarks that he would never say to your face... Because it's behind a screen, they're in bed with their laptop, they don't feel it's an issue."

Male, 24, warehouse worker, East Barnet

5.8 Extensive use of online reviews and recommendations

Almost all of the sample now make at least some use of online reviews (for example, when buying products, planning holidays and booking hotels). Reviews on Amazon, TripAdvisor and eBay were the most commonly mentioned.

The amount of use varies widely across the sample. It tends to be driven by specific user need, rather than by level of internet literacy, and can vary significantly over time for each individual.

Participants claimed that they rarely left feedback themselves (again, they are consumers rather than contributors). The exceptions were on occasions when they felt particularly strongly (either positively or negatively) about something.

"Independent comment is, I find, really useful... reviews of something that you're interested in doing or reviews of places you're thinking about going on holiday are really, really useful things to have, but I have never once done it myself, so yes, I suppose I am all take."

Male, 30, banker, London

Some reviews (e.g. eBay seller ratings) are taken extremely seriously by most participants, whereas others (e.g. TripAdvisor) are valued, but viewed with caution (participants are sometimes suspicious of the motives of those who leave feedback on these sites, especially when an item has only a few reviews).

"Unless it's glaringly obvious and everyone is singing from the same hymn sheet, then I take things like TripAdvisor with a pinch of salt, I have to say. It's difficult because sometimes when you find that someone has a bit of a gripe they can say something horrible on there, but the people who have had a nice time don't even post."

Female, 36, fundraising mManager, Cardiff

Both volume and quality of feedback were considered important. Most looked for a *consensus* of views from a large number of reviewers. A large number of positive or negative reviews was generally trusted, although some participants described themselves specifically seeking out *bad* reviews so they could see the potential shortcomings of a product or service.

"Recently I bought a fan for a CPU on a computer, so I went on Amazon… You sort the list by price and there are some very cheap ones on there, but if there are no reviews I won't buy them, even though they're a third of the price of the one I eventually bought… You have one with 4 reviews and five stars and one with 86 reviews and four and a half stars… I went for the one with 86."

Male, 27, planning assistant, Stevenage

5.9 Changes in attitudes to contextual online advertising

In the 2011 wave of fieldwork we explored in some depth participants' attitudes to online advertising. At that point, contextual advertising was in its infancy, and attitudes towards it varied between ignorance, acceptance and mistrust. Now that the practice is much more established and widespread, we revisited attitudes to contextual advertising in this year's wave.

Although in earlier waves some participants found any kind of online advertising intrusive, most participants have now come to accept that advertising has to appear as a means of funding most free web content and services, and on the whole this is a trade-off they are happy to live with.

As expected, this year there was much greater awareness of contextual advertising than previously. Some participants said they found it disconcerting that 'someone' was tracking their online behaviour. However, most accept it, are happy to ignore it (on the whole) and even occasionally find it useful.

The majority of complaints voiced were based on the irritant factor of poorly-targeted ads – either for things they had already bought, or for items they might have browsed inadvertently or casually.

“You innocuously look at something, like ‘I wonder what the boots are like’ and next minute you’re inundated with boots, boots, boots, coming out of your ears... you can’t even read your emails because of boots... big pictures of boots... boots with low heels, boots with high heels, furry boots… I was only having a quick look!”

Female, 52, catering worker, London

5.10 Little change in stated levels of concern about security and privacy issues

In 2011 we looked in depth at participants’ attitudes to personal security and privacy issues.

Some of the key findings were that:

- Most participants felt confident about privacy issues, believing themselves to have taken reasonable measures to protect themselves online (for example, setting their Facebook profiles to private).
- New online shoppers build confidence in online security step by step. Having successfully and safely negotiated modest transactions, they are then prepared to undertake more substantial and/or regular transactions.
- Most participants had some experience of online fraud – either directly or indirectly. All had been well looked after by their bank or credit card provider, and this had given them more, rather than less, confidence to continue transacting online in future.
- Participants were more nervous about transacting via mobile device than via a computer.

In this wave of fieldwork we have not seen any major changes in attitudes across the sample, although in terms of behaviour, some participants now describe themselves being more open (sometimes without realising it) in what they share through social media platforms like Instagram and Twitter than they were previously with their private Facebook accounts.

The initial nervousness about transacting via mobile devices does appear to be slowly subsiding, although many of the sample are still cautious about conducting online banking outsid the home. This is driven both by the fear of losing their mobile device with their account details on it, and in some cases, by concerns about the security of mobile data or WiFi networks.

“If I was on the public access WiFi, I wouldn’t log onto my bank account, for example.”

Female, 36, fundraising manager, Cardiff

This year, we saw a change in people’s work-related concerns in relation to their use of social networks. Participants are now more conscious that employers (or prospective employers) are able to monitor employees’ social media activity. Fears about data being ‘out there forever’ are actively preventing some people from contributing online, or making them more circumspect about how they contribute. (This may in part explain the current interest in ‘disposable’ sharing services like Snapchat.)

“Some statuses I wouldn’t want to put up under my name, on Facebook, about funny things that happened at work. I don’t think that’s appropriate for Facebook. And it is a bit of a dangerous game, because they say that employers do look on people’s Facebooks now.”

Female, 25, doctor, Portsmouth

Section 6

Mobile devices and services

6.1 For most participants, mobile has become their ‘essential’ device/service

When asked which media device or service they would least like to live without, the majority of participants cited their mobile phone. This is at least in part a reflection of the mobile’s increasingly multi-functional role – a modern smartphone can, with varying degrees of effectiveness, now satisfy the function of all other main forms of media technology.

“I’d be tempted to say my iPad, but really it’s my phone [which is most important] because I can do everything on that. I can call, text, use What’sApp and all the internet that I need.”

Female, 25, doctor, Portsmouth

Most of our participants (11 out of 17) now have internet-enabled smartphones – the majority of these now being iPhones. Smartphone use in our sample is heavily skewed by age; six of the seven oldest participants do not have one.

With the advent of smartphones we have seen a steady increase in the use of mobile internet for a range of activities across the sample, and this use is starting to be reflected in participants’ mobile contract choices. For younger participants in particular, the data allowance is seen as the crucial component in their choice of contract – especially as many contracts now offer very large or unlimited amounts of call time and text messages.

“Because me and my friends use What’sApp and Netflix and things like that – things that use loads of data – that’s the first thing you would look at [in a new phone contract]… My friend got a deal where she was given 500MB and we all laughed at her because it was so bad. She went over it by about £30 every single month.”

Female, 21, civil servant, Edinburgh

Another interesting change in attitudes over time relates to mobile phones and personal security. Whereas a mobile was once seen as making an individual potentially vulnerable to crime (with parents in particular expressing concerns that their children might be mugged for their phones), participants now more commonly talk about the security *benefits* of having a mobile.

“I even take it up to bed with me... because I think if I hear a noise I can phone someone… It’s a security thing, really.”

Female, 69, retired, Edinburgh

6.2 Further growth in tablet use

In 2012 we saw a large increase in the incidence of tablet ownership among our sample, and in 2013 this growth has continued. Eleven of the 17 households now have at least one tablet (ten of these own iPads).

Enthusiastic users describe the benefits of a tablet over both a laptop and a smartphone...

- Compared to a laptop, a tablet is more portable, switches on instantly, and has built-in camera(s);
- A tablet has a bigger screen than a smartphone (this is important for older participants – significantly the distribution of tablet ownership across the sample is not skewed by age as it is for smartphones).

"Since I last spoke to you I've acquired an iPad. It has changed the way I do things quite a lot. It's much easier to tap into what's going on... It's quicker to get onto the internet without having to boot up a PC... Quite often I find myself in bed looking at things, reading things... It just makes accessing the internet so much more convenient."

Male, 30, banker, London

Participants described using tablets in place of laptops for most routine web-based activities such as email, web browsing, social media and gaming. However, computers were still preferred by most participants for more 'serious' applications (e.g. word-processing), where a keyboard is required, and for printing.

"For example, if I was doing some history homework, I'd use my Mum's laptop to type it up, but I'd have my iPad next to me with all the information that I needed... I'd use my Mum's laptop for printing and so on."

Male, 15, student, rural Yorkshire

6.3 Further growth in the use of apps for targeted and/or routine activities

In line with the growth in use of mobile devices, we have seen a steady increase in the reported use of apps across our sample. Such use typically falls into one of two categories:

- Routine communication-based tasks, e.g. social media, email, messaging apps
- More targeted/specialist use, e.g. supermarket shopping, medical reference, monitoring share prices

In 2013 many participants reported using specific apps that they had not used in previous years, including What'sApp for instant messaging, Instagram and Snapchat for sharing photos, Spotify and TuneIn Radio for audio entertainment and Candy Crush for gaming.

6.4 Increased use of media streaming means that some participants use up their data allowance too quickly

The increased use of streaming services, and other mobile internet, has led to many of our participants using up their monthly data allowance too quickly. As a result, some have had to pay substantial extra bills.

"I got my girlfriend a phone as well, with calls and texts and so many gigabytes of data... £12 a month. I got my statement and guess how much was on it... You don't even want to know... £350!"

Male, 24, warehouse worker, East Barnet

As a result, most have modified their behaviour – either restricting their use of mobile internet or trying to make use of WiFi wherever possible (using mobile data to 'fill in the gaps'). Some have changed their mobile package or (in the most extreme case) cancelled the contract altogether.

"You get an alert when you're 80% into your data allowance, so at that point you think 'OK, I've got a limited amount of data left for the rest of the month'… At that point you do look for WiFi hotspots and do less downloading of songs or looking at videos."

Male, 34, web officer, Cardiff

We have seen this trend developing over the past 2-3 years of the study. At its root lies the difficulty our participants describe in gauging just how much data they are using. Unlike calls and texts, which are easily quantifiable, the rate of data use is a mystery to most. This is exacerbated by 'invisible' data consumption, such as apps refreshing or updating in the background. Knowing how to control this is a further source of confusion to most participants.

"Sometimes you don't even know how much internet one of your apps uses... Or even downloading an app can use loads of data… I didn't know that until I started downloading them. I try to only do it when I'm connected to the WiFi now, but it's hard to know what does and doesn't use internet data. I think it's fair if you're within five hundred megabytes or hundred megabytes they should send you a text or make you aware of that some way."

Female, 21, civil servant, Edinburgh

Some participants reported having tried to make use of notification services from their mobile provider to keep tabs on their data consumption. However, they have mixed experiences of doing this, and several respondents felt strongly that their mobile provider could be much more helpful in this regard.

6.5 Limited awareness of superfast broadband and 4G

Most of our participants had very limited knowledge of these new high-speed services. However, one participant (a web officer) had recently upgraded his iPhone to a 4G contract, and is considering upgrading his home to superfast broadband.

Awareness of superfast broadband was largely restricted to those (mostly male) participants who are highly IT literate. In practice, when prompted, the majority of participants claimed that their current broadband connection speed was adequate for their needs.

"All I know is that it's meant to be fast… It [current broadband service] does what I need it to do, at the speed I need it to do it… I don't think, like 'Oh, this is really slow…', so it's obviously fast enough."

Female, 47, housing officer, Coventry

Although more participants had heard of 4G this year, few really understood what the benefits might be. When prompted, the ability to stream HD video (for example) over the mobile data network was not seen as a priority, and many believed that the service was not available in their area anyway.

"I don't know much about it just now, because it's quite new. Only one of my friends has got it. The charges for it quite a lot and I don't think I'm willing to pay an extra fiver a month or whatever for 4G when I think that 3G is probably just fine."

Female, 21, civil servant, Edinburgh

Some participants, especially those who had already been affected by unexpectedly high bills, suspected that a faster mobile internet connection would lead to them exhausting their data allowance more quickly and/or bigger data bills; typically, these were the participants who were in principle most open to the idea of faster landline or mobile connections.

"What amazed me was that I got a bit carried away downloading albums on Spotify but that quickly went through my data allowance so I had to rein back on that."

Male, 34, web officer, Cardiff

6.6 Some participants are beginning to have problems sharing digital content between devices, and portability is slowly emerging as a concern

Several participants said they were having problems with syncing content/user IDs across multiple devices, for example:

- being unable to play music across both iPad and iPhone because of multiple IDs for one user; and
- content downloaded or created by children on a shared iTunes or other cloud-based account clogging up the parent's devices.

"I got the new phone and the iPad at the same time. I don't know what the mix-up was, but I somehow along the way got two different Apple IDs and so I couldn't sync the music. It took about two hours in the Apple Store in Southampton to get it sorted out."

Female, 25, doctor, Portsmouth

In addition, for the first time, some participants expressed concerns about the lack of portability of data, leading them to being 'locked-in' to services (e.g Spotify, Sky).

"There will come a point when you've got such a catalogue on Spotify that to re-create it would take ages... You get yourself to a point where you are so invested in something that you're never going to walk away from it, the costs are so expensive, so you're basically signing yourself up to paying £10 a month for eternity."

Male, 30, banker, London

Section 7

News

7.1 Further decline in perceived importance of broadcast news bulletins

In the 2010 wave we conducted an extensive exploration of participants' attitudes towards news. We have continued to monitor changes in behaviour and attitudes towards news content and providers in the subsequent waves. Over the past three years, participants have described the decreasing importance in their lives of broadcast news bulletins, as their basic news needs are now being met in a multitude of different ways.

Participants are aware that the mainstream news providers now deliver content across many different platforms and services. News is now 'recycled' across so many platforms that it's easy to stay up-to-date without making an 'appointment to view'. Most participants claim that they now keep abreast of the main news headlines (inasmuch as they want to) either via an on-demand platform (a website or news app), or in passing, while consuming other content (e.g. via their internet home page, or via Twitter feeds).

"Are we watching the same television? No... we don't need to look at the news on the television because we can catch that on the iPad...during the day... updating and checking as I go along, whereas before people used to sit down to the 6 o'clock or the 10 o'clock news, and that was the time when we caught up."

Male, 59, semi-retired, Pinner

"Only the BBC app, and I probably use that less now… it has probably fallen by the wayside since I started work, but if I do read the news it is only on the BBC app, I don't watch it or listen to it or anything else."

Female, 25, doctor, Portsmouth

This year we saw the first evidence of some younger participants relying primarily or exclusively on mobile devices and/or social media for their news consumption. Generally, these participants are not strongly engaged by news content, so they want the easiest and simplest way of keeping up to date.

"I don't watch the news because I don't really understand some of it, if I'm honest. On Twitter they just say 'a man has died'... they get to the point quicker. I only really care about the main stories, and that's all they publish on Twitter."

Male, 15, student, rural Yorkshire

For some of those with a stronger interest in news, the availability of specialist thematic provision online (either via specialist sites, customised feeds or by following specific individuals on social media) enables them to feed their interest with a diet rich in news content tailored to their interests. These participants described using Twitter and apps such as Flipboard as an important part of their news consumption.

"I've got a few news apps that I use… the BBC one is quite handy, but also Flipboard, a kind of social linking news application which just aggregates content from different social media channels and puts it in a magazine format, which I like because they offer different types of magazine based on users, general technology, design, or someone might set up a quirky magazine that looks interesting, so I might follow that."

Male, 34, web officer, Cardiff

7.2 Evolution in the claimed use of different news sources

Almost all of our participants are using BBC News daily across at least one platform.

Among other news 'brands', Mail Online has become much more prominent in participants' claimed behaviour this year, and was cited numerous times as a regular source for following less serious stories. In particular, most of the twenty-somethings in the sample talked about visiting Mail Online as a kind of 'guilty pleasure'.

"It's just gossip, basically, but it's really interesting and me and all my friends at work sit on it and email each other... 'Have you seen this on the Mail Online'. It's quite funny. All my friends look at it."

Female, 21, civil servant, Edinburgh

Beyond a few prominent reference brands, the distinctions between traditional broadcast/digital media news brands and other types of news source are becoming increasingly blurred for some participants.

Brand-agnostic platforms such as Twitter, and aggregation apps such as Flipboard, have created an environment within which 'official' and 'unofficial' sources co-exist, with equal degrees of prominence. So, although participants followed BBC News on Twitter, for example, its place in their hierarchy of sources was no higher than that of an individual journalist, blogger or friend.

"It tends to be quite blurred between what's official and what's unofficial. I quite like that. It tends to go on what's popular and what's recommended."

Male, 34, web officer, Cardiff

Section 8

Children and digital media

8.1 Children's use of digital media is increasingly alien to their parents and grandparents

Seven of the 17 participants are parents of school-aged children. A further four participants are grandparents with some hands-on responsibility for child care (one of these, our oldest participant, is a great-grandmother).

Since the start of Media Lives in 2005, we have consistently tracked parental attitudes towards children's media consumption, seeing changes over time, both in the emergence of different technologies and services, and in relation to the children's changing developmental stages.

The range of content available for children to access now, and the devices used for accessing such content, is radically different to participants' own experience as children, and in many cases quite different to how these adults are accessing and using media, even now. Younger children have grown up in a world of mobile devices, touchscreen interfaces and ubiquitous streaming digital media, and participants' children are engaging and interacting with digital content at a younger and younger age.

"She (granddaughter) is a year and a half, and as soon as she comes in here she says 'phone!' and I have to show her wee videos of her as a baby. The she grabs it and walks around the room with it showing everybody."

Male, 52, unemployed, Lisburn NI

Parents and grandparents in the sample are consistently impressed by children's ability to engage and interact with digital media across a range of devices. However, most also recognise that they face a dilemma; balancing the need to encourage their children to develop digital literacy skills, and to protect them from potential harm.

Where younger children are involved, these concerns mostly relate to the amount of time children spend on digital media, at the expense of 'healthier' activities, rather than the nature of the content to which they might be exposed. Grandparents, in particular, are alarmed at the volume of electronic media (TV and/or games) consumed by their grandchildren. Busy parents in the sample tended to be more pragmatic and/or lenient, conscious both of the potential educational benefits and the practical help digital media offer them in terms of 'babysitting' their children.

With older (teenage) children, the concerns were more likely to be oriented towards the nature of the content consumed and/or the social interactions taking place on social media. For example, participants reported having difficulties enforcing age limits on content when children control access to the content in question through their own devices, rather than via a family TV or PC.

"I don't really know what they have on their iPads… I haven't really supervised it that much. I know they've got games on there, apps that they've downloaded… but I should probably know more about it than I do."

Female, 44, arts fundraiser, Warwick

Moreover, lack of understanding or poor communication between busy parents can lead to problems, especially when children are smart enough to exploit that confusion as a means of accessing content to which they would not normally be granted access.

"My son (aged 11) came down with this iPad and said 'Can I have this game?'. I assumed he'd just been with his mum and said it was okay. I think it was Grand Theft Auto, which is an 18. She came down and she had a right go at me. I said 'I didn't know what it was... if I'd known what it was I would've said no'. I think I was watching football at the time, so I wasn't fully aware… That particular time he just caught me out."

Male, 39, engineer, rural Derbyshire

8.2 The ability of parents to monitor and control children's TV viewing varies greatly by age

Parents of young children described themselves using TV, websites, streaming services and YouTube as a way of entertaining, mood managing and/or babysitting younger children. Most exercise very close control over what content is consumed at these times.

"Maybe he'll watch a bit of TV in the morning if it distracts him while changing. We'll use iPlayer in the evening just to calm him down, something like *In the Night Garden*. We just use it tactically, I guess."

Male, 34, web officer, Cardiff

As described in section 2.2 above, the proliferation of viewing devices and non-linear services means that family viewing is becoming much more fragmented and individual. Consequently, by definition, more and more of children's viewing is apart from their parents once they have devices of their own. Monitoring their viewing consequently becomes more difficult.

"As a rule we try and keep an eye on what he's watching. The other day my daughter had a friend round and he was off in the dining room watching Netflix. I asked him what he was watching and he told me what film it was... I thought that wasn't too bad, but then I heard some swearing and I said straight away that he had to turn it off."

Male, 39, engineer, rural Derbyshire

Section 9

Consumer issues

9.1 There are large differences between participants' skills in purchasing digital hardware and services

The more technologically literate participants described themselves as being happy to research their hardware and service purchases online, and make extensive use of the facility to compare prices, read user reviews, etc.

But other participants found the process intimidating. Online reviews are considered helpful, but the sheer weight of information can be confusing or even overwhelming to them.

These participants struggle to understand the different digital media hardware and services available. Moreover, some described the staff in shops as being unable to explain things to them in 'layman's terms' that they could understand. Consequently, some feel partially excluded from the new world of technology hardware and services, even though they may in fact be reasonably accomplished users of the internet and other digital media.

"We went down to Currys and PC World and again we were just bamboozled. You don't know what all the signs and symbols mean on the packaging. When the young lad came over and was talking about it having this many gigabytes or whatever, I was just thinking 'I haven't got a clue what you're talking about'. All of a sudden we're just this generation that doesn't understand."

Female, 47, housing officer, Coventry

Paradoxically, in an era of global communication and information-sharing, some participants are becoming increasingly reliant on personal recommendation and advice from friends and family to help them choose hardware and services.

9.2 Several participants have taken advantage of bundled services in the past year

Several participants described having taken up bundled offers (TV + broadband + phone) with current or new service providers in the past year.

However, the availability of a good-value bundle was not itself the catalyst for change. The change in provider or service was triggered either by the acquisition of a new service (e.g. getting a broadband installation for the first time) or by a strong desire to upgrade one aspect of the service (e.g. upgrading from basic Sky to Sky+, leading to one participating household taking on Sky instead of BT as their broadband and phone provider).

For these participants, the availability of bundle deals was a factor to be considered as part of the purchase decision (when prompted to do so by a provider), but not a trigger to switching in itself.

‘Nuisance’ calls are a real problem for many participants

For the first time, this year’s research explored participants’ experiences of, and attitudes towards, unsolicited phone calls.

Many participants described themselves as being inundated with ‘nuisance’ calls, and found these a source of intense irritation. These calls were mainly being received on landlines, but some participants also described receiving them on their mobiles.

Most had extensive experience of such calls – often from PPI claims services or energy suppliers. Many participants described themselves as being particularly annoyed by calls from overseas and/or pre-recorded messages.

“I get at least one a day, and I know where they’re coming from… They’re foreigners, let’s put it that way. Sometimes I just pick up the phone and leave it for half an hour, then put it back and think ‘That’ll stop them!’.”

Female, 69, retired, Edinburgh

Participants described using a variety of strategies to deal with such calls, including screening incoming calls, using caller display (when it works) to identify the incoming number, or allowing their answerphone to take all incoming calls.

There was limited awareness of TPS across the sample, and mixed experiences of signing up for it. One participant (who has worked in marketing) described having had considerable success in eliminating most cold calls by signing up. Others, however, claimed to have signed up, but felt that this had made very little difference, particularly with regard to calls from overseas.

9.3 Landlines are now perceived as less valuable and important

Participants’ experience of nuisance calls has significantly affected their perception of the value of landlines. There is an interesting parallel here with attitudes seen in previous waves in relation to post; both have gone from being seen as an essential part of participants’ daily lives to being seen increasingly as a conduit for ‘junk’.

Nuisance calls are particularly annoying as most participants’ use of landlines is now quite limited; they use mobiles more for personal calls, and use the internet, rather than a landline, for administrative tasks such as banking or booking tickets.

The main purpose that participants now described using their landline for was family calls (especially for keeping in touch with older relations) and as an emergency back-up.

“Apart from my Nan, I don’t know anyone who uses a landline any more. My aunties don’t have a landline, nobody’s got a landline, because everyone got a mobile. If someone rings your landline, you’re not at home, you’re at work, you’re out doing something or other, but your [mobile] phone is constantly on you.”

Male, 24, warehouse worker, East Barnet

Indeed, several participants said they would like to get rid of their landline altogether, but believed that they were obliged to keep it as part of their broadband contract/bundle.

“The landline is tied up in so many packages that currently, as I understand it, you’re not able to do without the landline.”

Male, 59, semi-retired, Pinner

Annex 1

Summary profile of wave 9 participants

Sex	Age	Job	Location	Years in study
M	15	Student	Rural Yorkshire	1
F	21	Civil servant	Edinburgh	6
M	24	Warehouse worker	East Barnet	8
F	25	Doctor	Portsmouth	8
M	27	Planning assistant	Stevenage	3
M	30	Banker	London	9
M	34	Web officer	Cardiff	8
F	36	Fundraising manager	Cardiff	8
M	39	Engineer	Rural Derbyshire	9
F	44	Arts fundraiser	Warwick	1
F	47	Housing officer	Coventry	9
M	52	Unemployed	Lisburn, NI	6
F	52	Catering worker	London	8
M	59	Semi-retired	Pinner	8
F	69	Retired	Edinburgh	6
F	77	Retired	Bucks	9
F	80	Retired	Coventry	9