
Adults' Media Lives 2018: A qualitative study

Wave 13 Summary Report

Research Document:

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About this document

This document provides analysis of the 2018 findings from our Adults' Media Lives study, which was set up in 2005 to provide a small-scale, rich and detailed qualitative complement to Ofcom's quantitative surveys of media literacy. The project follows the same individuals over time and interviews them on camera each year about their media habits and attitudes. The interviews provide evidence about the motivations and the context of media use, and how media is part of daily life and domestic circumstances.

The project also provides us with rich detail of how media habits and attitudes change over time, particularly linked to life stage.

The Communications Act 2003 placed a responsibility on Ofcom to promote, and to carry out research into, media literacy. This report contributes to Ofcom's work in this area.

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1. Introduction to the study

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

This 13-year ethnographic video study has tracked the evolution of individuals' relationship with digital media – how it fits into their lives, what motivates them to adopt new technology and learn new skills, their usage habits, levels of understanding, issues and concerns about media.

Each participant is interviewed in-home and at length (each interview lasts around 90 minutes). This allows both for a full exploration of the relevant issues and for demonstration/ observation of media use in-situ. Thirteen waves of research have now been conducted; the first was in February 2005, with all the subsequent waves carried out in October. The most recent interviews were conducted between 3rd and 20th October 2017 by Mark Ellis, Tony Harbron and Tony Palmer of The Knowledge Agency.¹

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

Certain subjects have been tracked consistently each year; many of these have been subject to great change over the 13 years of the study, for example:

- acquisition of new media hardware (digital video recorders/DVRs, DAB, smartphones, tablets etc.) and services (such as super-fast broadband, streaming services, etc.);
- development of media skills, confidence in the use of digital media, and adoption of new online activities (e.g. sharing content via social media);
- use of mobile devices to consume content;
- sources of knowledge and information about media;
- trust in media providers across different media platforms; and
- concerns about privacy, security and safety.

¹ For the first time in 2018, we will be naming the report after the year of publication. Previously, we named the report after the year of fieldwork.

However, the research model is flexible enough to explore specific topical and/or emerging issues each year. For example, in the latest interviews, we looked at attitudes towards UK-based programming and production, 'fake news', the use of messaging apps such as WhatsApp, and the use of the internet as a learning resource.

All interviews are filmed, and video is the main vehicle for the presentation of findings from the research. The key insights from each interview, every year, are clipped and catalogued by theme, platform and participant. This cumulative collection of over 4,000 video clips now represents a uniquely rich and detailed resource for exploring the evolution of attitudes to digital media and media literacy issues in the UK. It is used widely across Ofcom and in presentations to a range of stakeholders.

This study provides rich contextual insight into trends that are observable through large-scale quantitative surveys. It also acts, on occasion, as a bellwether, indicating a direction of travel, in terms of attitude or behaviour, that is not yet observable from other data sources. Its findings should be read as illustrative and illuminating, rather than as fully representative of the population.

2. Overview

Key insights from the 2018 wave include:

- **Media technology is at the heart of participants' lives** (Section 3). Thirteen of the 19 find it essential for their work, studies and/or social life, and there was evidence of (slightly) more creative use of technology and proactive use of the internet (e.g. creating websites, producing videos) compared to previous waves, across the sample. The internet has brought new opportunities for some of our participants to launch their own businesses or to work in a different way, and it is used extensively for various kinds of learning, especially by those who prefer to learn from video, rather than text-based content.
- Consequently, participants are more concerned than ever before about the implications of being deprived of internet access. Whereas in previous years losing internet access might have been an irritating inconvenience, many would now consider it as a major problem and even, in some cases, a threat to their livelihood. Participants are also more aware of the importance of their online reputation.
- Some concerns persist about anti-social media use, and particularly its effect on young people's social development. However, most users feel compelled to keep up with the constant stream of information they receive from social media, messaging apps, etc. Younger participants (in particular) were less likely than in previous years to express qualms about perceived bad manners when using their mobile phone in a social situation. This is partly a function of habit but is also justified by their observation that others (e.g. their parents) behave the same way.
- **Participants appear to be more open to switching suppliers than in previous years** (Section 4). When weighing up alternative providers, participants speak about conducting only limited research before making a decision, although some have become savvier when it comes to negotiating better deals with their current suppliers. Bundles are still a popular way of buying services, particularly in terms of perceived convenience. Several participants have opted to bundle their families' mobile phone contracts together for the first time.
- Just under half the sample have changed their mobile phone deal in the past year. Data was the factor most often cited as deciding their choice of package. Few, if any, participants had upgraded to a current top-of-the-range handset in the past year. This was in contrast to previous waves, when handset upgrades were the primary reason cited by participants for changing their contract and/or provider.
- **Viewing habits amongst our sample continue to evolve** (Section 5), with catch-up, on-demand, streaming services and YouTube becoming more important at the expense of traditional linear TV, and viewing activity spread across a range of devices.
- Most participants now use at least one streaming video service. Of these, Netflix was by far the most prominent. Netflix has developed a strong reputation for breadth and depth of high quality content across the sample, including its original content which was highly regarded.

- Alongside the growth of streaming services, a significant proportion of participants are using YouTube to access user-generated content. Some praised the breadth and diversity of content available to satisfy specialist interests, whilst others liked the ability to view raw, first-hand footage of real events, which they sometimes claimed was more trustworthy than what is presented in the mainstream media.
- **There were differing opinions around the value of PSBs, including the BBC** (Section 6). Although most, if not all, participants recognised that there are high quality programmes on PSB channels such as BBC One, ITV1 and Channel 4, including news, documentaries, local content as well as more mentally challenging content. There were some, however, who compared the breadth and range of the PSB's content unfavorably with subscription services as well as the quality and/or impartiality of the BBC's news and current affairs.
- **Participants demonstrate little understanding of how TV is regulated** (Section 7). Most had different expectations about standards on different channels/platforms depending on the perceived audience each caters for. Few knew how to complain if they saw unsuitable content, although most expected that information about how to do this would be readily available online. No participants had complained in the past year and, in practice, none had felt inclined to do so. This was largely because most had either not been offended or thought that the most appropriate response would be to just switch off what they were watching, although a few had not complained because they did not think it would be taken seriously.
- **The role of radio appears to be changing for some younger participants** (Section 8). Radio continues to play its traditional role for many (especially older) participants, but some of our younger participants claimed that music radio has now been largely supplanted in their media repertoire by music streaming services such as Spotify and Apple Music. We also witnessed a significant increase in younger participants claiming to listen to speech content, either on the radio or via podcasts.
- **There is no evidence that participants' smartphone dependency is decreasing** (Section 9). As well as the smartphone's key role as a social media tool, many participants described it as playing an increasingly important role in their work life. Increased mobile data allowances have allowed them to use their phones more frequently and for more tasks, with less reliance on wifi access.
- Over the last two to three years, we have seen a rapid increase in claimed use of WhatsApp among our sample. Fifteen of our 19 participants now use it; most find it essential. Users claimed that WhatsApp has replaced much of their texting activity, some calls, and some social media use. Most claimed to be in multiple WhatsApp groups based around family, interests, activities, and even specific events.
- **Some participants are adopting a more cautious approach to privacy on social media** (Section 10). Education in schools on the importance of privacy is one factor that is driving a more cautious approach. Older participants learn mainly from experience, although there was some evidence that their awareness of potential online privacy issues has been heightened by TV shows such as *Catfish* and *Hunted*.
- Some participants also expressed concern about the sharing of their personal data between online platforms. The appearance of ads on one platform, based on their behaviour on

another, is disconcerting. Despite such misgivings, however, participants rarely read the terms and conditions of sites and services for which they sign up.

- **There has been an increase in the cultural and geographical diversity of the news sources used by many participants** (Section 11). The availability of a broader range of sources than before, and the influence of social media and news aggregator apps as means of accessing and sharing news content, have exposed participants to providers of which they might not previously have been aware. These sources include established overseas news outlets, online channels, and individuals in the field (for example, participants in the 2017 demonstrations in Catalonia).
- A significant minority of participants were vocal in describing their disenchantment with mainstream UK news providers. Some participants continued to express anger about the outcome of the EU referendum, and the role they felt mainstream news brands had played in this. A few participants had become deeply suspicious of the mainstream news media, influenced in part by their exposure to other content providers (often on YouTube) which are sometimes overtly hostile to mainstream news providers.

3. Changing attitudes to media technology

Media is at the heart of participants' lives

In recent years, participants in the study have described the role of media technology – and especially the internet – as ever more important to their lives. In the most recent interviews, it was clear that, for the majority of our participants (13 of the 19), the internet is now essential for their work, studies and/or social life. These participants claimed that not having access to the internet would be a major problem for them.



I'm in the final year of my degree and I'm doing make-up as my part-time job now – I used to work in Costa. Instagram and Facebook are my only source of marketing for getting clients in. It's working really well; I don't need anything else.

Female, 25, student, Edinburgh

We're really dependent on that kind of infrastructure, because if we haven't got broadband in the house, Wi-Fi wherever we are, it's much harder to engage in work, play or any other activity, I guess.



Male, 38, web officer, Cardiff

This view was common among both male and female participants. However, there was a clear divide between the under- and over-65s in the sample; none of the latter group believed that they had this level of dependency on media technology.

The internet has created opportunities for some of our participants to live and/or work in a different way. For example, one participant – a recent graduate – had found a job as an academic tutor. He works from home, and communicates with his agency, bids for assignments, and enters his time-sheets online. Although most of his tutoring is face-to-face, some of it takes place online, with students as far afield as Hong Kong.



You have your jobs board, so all the jobs that are applicable to your skills and expertise are put up there and you can apply for those jobs on that portal. You also upload all the hours you've done on there, and at the end of the month [agency] will invoice all the clients based on those uploads.

Male, 21, tutor, London

In another example of how people are relying on the internet for their livelihoods, one participant, who is semi-housebound, had taken up online gambling in an attempt to access an additional source of income.

The importance that participants place on media technology for themselves and their families is also revealed in their plans for the future. A young father from Birkenhead, whose wife is imminently expecting a second child, described their plans for a high-tech nursery in their new home.

We're already thinking about having a massive playroom for the baby... we want him to have the TV on the wall so he can watch all his films on there when he has play dates. We want a little corner so he can use his iPad, and USB sockets and stuff like that built into the wall.



Male, 31, station assistant, Birkenhead

Because access to the internet is so important, participants do have concerns about their vulnerability to technical issues or to malicious interruptions to access. Whereas in previous years losing internet access might have been seen as an irritating inconvenience, some would now consider it as a threat to their livelihood. One participant went as far as to describe this as a national security issue.



There are lots of concerns about the internet... It's a war tool. If what they say is true, cyber [attacks] can actually take down whole countries.

Male, 63, semi-retired, Pinner

Online reputation is becoming more important

In the last few years of the study we have seen growing awareness among our participants of their online reputation. This was truer than ever in the latest round of interviews, particularly among the younger participants, who are generally more active online, and are more likely to have been told at school about the dangers of posting content that could damage their educational and/or career prospects.

You obviously watch what you say because you know that the people who employ you, or people who might want to employ you, are going to be checking up on social media. So I'm still careful what I put on, like, retweet, stuff like that.



Male, 19, student, Leeds

As participants' life stage changes, their attitude to what they post online sometimes also changes, in the light of new, work-related social media friendships. For example, one A-level student who works part-time as a gymnastics coach claimed to have modified her social media behaviour as a result.

Because I'm working quite a lot now my Facebook and my Instagram are connected to my workplace so people can see me, like the gymnasts' mums and the people that I work with. So, I am cautious about what I post just in case the children see it, or I'll look bad.



Female, 17, student, Warwick

As the internet has become more integral to participants' working life and career plans (see above), online reputation has, for some, become particularly valuable.



When I first started doing make-up it was just my friends, but now I've grown a bit of a business, so I don't know a lot of my clients, what they're really like. What I'm really scared about is if anyone were to post something. Even if I haven't done anything wrong, people love to go on to social media to get attention, or to go viral.

Female, 25, student, Edinburgh

Although most of the younger participants have had some education about how to behave online, some of the older ones have had to learn from negative experiences what they should and shouldn't talk about on social platforms.

I don't post as many things as I used to about my political views, because I found that not everyone has the same political views as me. I did lose a couple of my friends on Facebook... They thought that, because of what I'd put, I'd turned racist, so I said "Why would you think that, just because I've got this thing about Nigel Farage on there, I've become racist... of course not."



Female, 44, stay-at-home mum, rural Essex

Concerns persist about anti-social media use

While most participants spoke in overwhelmingly positive terms about the benefits of media use, some concerns persist about the wider effects of this. Anti-social media use is a source of concern both among heavy users themselves, and among those who live with them.

Keeping abreast of the media (and especially, this year, the constant stream of information from messaging apps) can be overwhelming and/or addictive. Some participants recognised this, but also felt that fear of missing out and/or pressure from their peers to respond to conversations was difficult for them to resist.

I am on it in bed before I go to sleep, which I do want to stop; I want to go to bed at ten and have an hour of winding down before I go to sleep. But it is hard because I know that everyone is just on their phone in bed. Social media is more active in the evening.



Female, 17, student, Warwick

In a subtle but significant change of attitude compared to previous years, younger participants were less likely to express qualms about perceived bad manners when (for example) using their mobile phone in a social situation. This is partly a function of habit but was also justified by their observation that others (e.g. their parents) act the same way.



Everybody that I know, like my family and my friends, we're just on our phones all the time. But I think that these days that's just normal. Two or three years ago you would have said "Everybody uses it far too much", but now it's a bit like "Well, why not?".

Female, 25, student, Edinburgh

Some older participants, particularly those who see media technology as less essential, were more likely to be ambivalent or critical towards the use of media technology in social situations.

I met a friend out in Birmingham. We hadn't seen each other for over a year. Her phone went down and all I kept hearing was "Oh I'm ever so sorry, I just need to get this... you must think I'm really bad".



Female, 51, housing officer, Coventry



My missus is always doing Snapchats, so I say "Why are so focused on letting everyone else know what a good time we're having instead of just having a good time ourselves?".

Male, 28, security guard, East Barnet

The most widespread concerns were about the impact of excessive media use on the development of the younger generation's social skills. This was particularly prominent among the comments of grandparents in the sample, although some much younger participants (including one in her early 20s) expressed similar concerns.

I don't know why this generation has got so keen on phoning... communication. They're all communicating all of a sudden and yet if you're at a bus stop now people don't really talk to each other.



Female, 84, retired, Coventry



On social media you'd think "This person's so fun, they're a big personality" or "They're funny", but then you meet them [in the flesh] and it's like there's nothing there. I don't know if that's a function of coming through that generation where nothing is done face to face, so they haven't had a chance to develop those basic skills, or whether they would have just been like that regardless. I think it is having an impact, definitely.

Female, 25, student, Edinburgh

Paradoxically, there are examples of social media affecting 'real' social life in a positive way

Although participants were concerned about the negative effect of excessive media use on face-to-face social skills (see above) we also heard a number of examples of social media improving participants' face-to-face social life.

One participant, of Sikh origin, who works for a rail company as a station assistant, had been the subject of seven race hate crimes in the past year. He had recently agreed to participate in a YouTube video created by the British Transport Police, talking about his experiences and highlighting the impact of such crimes on both victims' and perpetrators' lives.

Since the video was published, as well as receiving many, mostly positive, messages online, he has noticed a change in his relationship with his work colleagues, many of whom are now much more interested in his race, faith and culture than they had been before.

British Transport Police approached me about doing it. I was happy to do it.... A lot of people have seen it, which is great... In work people have seen a different side to me now, they've understood me. People come up to me and question me now... "How do you feel? Tell me a bit about your background." No-one has ever asked me this before, but I've had about five people [doing so] in the last week.



Male, 31, station assistant, Birkenhead

There is evidence of (slightly) more creative use of technology and proactive use of the internet across the sample

In earlier waves, there were few examples of participants using media technology creatively and/or proactively (e.g. creating their own websites or uploading their own videos to YouTube). In 2017, however, there were a few examples of this.

Several participants described using online services to print books or albums from their photos and one, a retired civil servant, had led an online campaign against housing development in his area, using multiple platforms.



I set up a campaign Facebook site and a website with the help of somebody that I know. That ran for a couple of years while we were coping with some planning developments, and so that was a useful experience. Over a period of two and a half years I was adding stuff once every couple of weeks.

Male, 73, retired, Warwick

Another – the part-time make-up artist – is planning to setup her own YouTube channel, and has gone as far as buying some of the equipment required for filming videos (although she had not posted any at the time of the interview).

I've bought lights – box lights I think they're called – and I'm thinking of giving it a go. I get a month off in December so I'm thinking I'll do it then because I've got a few ideas. I've got a bit more confidence now that I've got a good client base, I'm a bit more established, whereas if I'd done it a year ago it would have been a bit random.



Female, 25, student, Edinburgh

The internet is now used extensively for various kinds of learning

For several years now, participants have discussed using 'how-to' videos on YouTube increasingly frequently, and last year, for the first time, a few participants talked about using dedicated online learning platforms such as Highbrow.

This year, the use of the internet as a learning resource appears to have become even more widespread. Participants variously described themselves using videos and other online content for practical tips and tricks, support for schoolwork and revision, higher education resources, work-based learning, independent study and personal development.



Because I'm doing a lot of maths I will be given sheets and all of the sheets are from the internet. So if I'm doing a question and I don't know the answer, or I don't know how to do it, I can just go on my phone... There are YouTube videos of how to do questions so I'm always watching those, or looking at mark schemes.

Female, 17, student, Warwick

I've got a new lad who started with me in October – an apprentice – and he has just signed up for the Open University. He didn't want to do block release or day release in case he missed out on any good jobs... It's all online. He has to do monthly exams – it's all on the internet.



Male, 43, engineer, rural Derbyshire

Several participants described video-based learning as being more accessible than traditional text-based approaches. Indeed, it seems that visual resources are providing learning opportunities to some who might not otherwise use them.



I used to read blogs, but it's much easier to understand what they mean when they can show you it in a video rather than having to try and interpret what you think they mean when you read it.

Female, 25, student, Edinburgh

I wouldn't have even bothered if it was written. I only would have gone to YouTube to see if there was a tutorial. Instead of reading stuff on a bit of paper I prefer to visualise it and watch a demonstration. Instead of having to test it out myself you can see that it works; it's proof that it works.



Male, 28, security guard, East Barnet

Some participants are making forays into the world of connected home technology

For the first time this year, participants cited examples of using connected home technology, although this is clearly in its early stages. Two participants' households had dabbled with Amazon Echo devices, and used an app-connected smart energy meter.



[Re: Amazon Echo] It's a novelty, it's a reasonable price, and it's a feature that when people come in you can say "Here, watch this"... It's very easy to have that thing in the corner and just give it a command. That's where the next battleground is going to be between all the various hardware and software companies.

Male, 63, semi-retired, Pinner

But feelings about such technology were mixed, and across the broader sample, interest was limited. The ability to remotely control household heating was not always seen as positive (depending on who was in control).

There's an acquaintance of mine. Her husband works away from home. If she puts the heating on, he knows... so he phones her and says "Turn that heating down, we don't need it on"... It's really cold in the house, and he's working out in Dubai where it's probably 40 degrees. She says "I daren't put the heating on". Isn't that sad.



Male, 28, security guard, East Barnet

There was significant interest in connected home security technology such as CCTV and doorbells with cameras connected to mobile phone apps - these were being heavily advertised at the time of the fieldwork.



We have an app that lets you watch all the cameras in the house. When Mum went on holiday I downloaded the app as well so I could keep an eye on the house when I went out and make sure that the dog wasn't destroying the place.

Female, 25, student, Edinburgh

We're definitely getting that in the new place. I like it. I've seen it, and a few people from work have got it as well. When someone has rung on the door they've shown me, and you can see that it's just someone with a parcel. To me it's safety. When I'm at work I can watch over the place. It's all on your phone.



Male, 28, security guard, East Barnet

4. Customer experience

Participants appear to be more open to switching suppliers than in previous years

Three of our 19 households had changed the supplier of one or more of their media services in the past year. Of these, two had changed mobile network and a further one had changed broadband and TV provider. Beyond this, four participants claimed to be actively considering switching provider at the end of their current contract period, and several participants described themselves as having upgraded or renewed their services with their current supplier. This is significantly more than in previous waves.

Catalysts to change included broken devices, the pursuit of a better deal, perceptions of poor quality services, or changes in domestic circumstances necessitating the setting up a new contract.



One of our friends' kids launched my phone downstairs and it smashed to bits mid-contract. I couldn't afford a new phone so switched to Tesco Mobile to get a phone, so I actually had two accounts running... just to get another iPhone... Although it was really good value I had to switch back, just because of the coverage.

Female, 40, fundraising manager, Cardiff

When weighing up alternative providers, participants spoke of conducting only limited market research – typically checking their current supplier plus one other – before making a decision. Only one participant claimed to have used a price comparison website to inform his choice.

I did look at Carphone Warehouse, because they've got a better website. Sky didn't have that many phones so I looked at Carphone Warehouse, but they're a lot dearer than Sky. And I got a really good deal. I got six mega-whatever-it-is of data. That's good, isn't it?



Female, 44, stay-at-home mum, rural Essex

Some participants do appear to have become more knowledgeable in negotiating with suppliers, particularly when renewing their services. There were several examples of participants playing one provider against another to get a better deal.



I spoke to them [EE] and I just made up a story. I said "Why is Vodafone offering me £55 a month, and yet you're trying to charge me 80 quid?". I didn't even ask Vodafone. I put the phone down for about an hour then they rang me back and said "Oh yeah, we've just found a package where we can do that for you".

Male, 28, security guard, East Barnet

Bundles are still a popular way of buying services

Most of our participants continue to buy their media services as a bundle, although there were a few examples of participants opting to mix and match between different suppliers in the hope of getting a better deal.

I've been quite happy, but I think I can save more money by changing package. This year I'm thinking of doing things a bit differently. Instead of just going to one provider... I'm thinking of going to Apple directly to get the iPhone and then just getting a SIM with BT because that will work out considerably cheaper.



Male, 38, web officer, Cardiff

The main benefits of bundled services were described as convenience, simplicity of monitoring and bills, and perception of good value for money (although there was sometimes confusion about what they get for their money).

If you're prepared to separate your package and take phone and internet and TV as separate things maybe there's more flexibility about what you can get, but there's certainly something to be said for the ease and convenience of having it all through one provider.



Male, 34, banker, London

In some cases, a supplier's introductory offer had enticed the user to upgrade from a basic package to a higher-tier home bundle.



I've gone for a TV and broadband package that is everything they could possibly give you, at a cost that goes along with it... The introductory offer makes it a little bit more palatable, but certainly after that first year we're going to have to have a serious chat about what the ongoing cost is going to be.

Male, 34, banker, London

In a new development this year, several participants have opted to bundle their families' mobile phone contracts together to form a shared account, motivated both by what they believe to be better value for money, and by the perceived convenience of having all their accounts with one supplier.



I thought "I wonder if I can get a phone on contract?", and I could. So then I got three... I had an email a few months ago saying that they [Sky] were starting to do mobiles, so I got in touch with them because I've got a good record of payment with them.

Female, 44, stay-at-home mum, rural Essex

Data was often cited as the key factor in choice of mobile supplier/package

Although only two participants had changed provider this year, seven of the 19 had changed their mobile phone *deal*, the majority staying with the same supplier but on new terms. This includes most participants aged under 35.

When choosing a new package, getting the maximum amount of data for the least cost was most often cited as the key factor influencing their choice. Indeed, several participants thought that the call and text allowances included in most packages were probably more than they would ever need.

I think now almost all phones come with unlimited texts, and iMessage kind of nullifies that anyway. I don't tend to make long phone calls. The main thing I was looking at was data, because my old contract was 2GB per month and it wasn't enough since moving to London. If I'm looking for a client's house I'm using Google Maps to find them and it was just eating through the data too quickly. So now I have 8GB per month, which is plenty.



Male, 21, tutor, London

Growth in the use of messaging apps such as WhatsApp has made texts (and, for some, even calls) significantly less important. This reinforces the growing importance of mobile data.

Where participants did articulate a perceived trade-off between the different elements of the package, this was most likely to be between choice of handset and data allowance. Indeed, few, if any, participants had upgraded to a current top-of-the-range handset in the past year. This differs to our findings in previous years, when getting a new handset was often the main reason for participants to upgrade their contract.



When I rang up to change I found that I could get unlimited data, but on a different contract. It just means that I don't get an upgrade on my phone. Whereas I used to be eligible for an upgrade, now if I want a new one I buy a new one, simple as that.

Male, 19, student, Leeds

Most are happy with the services they receive, but there are occasional problems

Several participants had experienced issues with one or more of their service providers in the past year, but these were isolated incidents. There was no consistent pattern to participants' frustrations with suppliers, either in terms of specific issues faced or specific suppliers cited. But as we have seen in previous years, there are certain recurring themes in participants' complaints about their experiences as customers.

- Persistent technical issues which suppliers struggle to solve.

- Difficulty communicating with (usually overseas) call centres.
- Complaints processes that are difficult to follow through.

5. TV and streaming video

Further evolution in participants' viewing habits

The latest interviews revealed that claimed viewing habits among our sample continue to evolve. Catch-up, on-demand, streaming services and YouTube are becoming more important, at the expense of traditional linear TV, and viewing activity is increasingly spread across a range of devices.

As a result, participants describe themselves adopting a mix-and-match approach to platforms and viewing devices; for example, watching more TV than previously on smartphones and tablets, as well as watching more YouTube and Netflix on their TV sets. Many now have multiple ways of watching catch-up content (e.g. BBC iPlayer) and will choose different methods based on viewing context (i.e. where they are, or what they have been watching previously).

But to be honest with you I don't really need to watch the BBC or ITV live, because it's on the Sky app that I use... it's only for catch-up.



Male, 19, student, Leeds



I like watching comedy programmes on there [YouTube]. Things like *Live at the Apollo*. I see new comedians on there then I try and seek out old videos of the comedians that I like now to see where they've come from, what they're like now and how much they've changed.

Male, 21, station assistant, Birkenhead

Participants now claim to watch little live television. They describe most of their viewing as consisting of a mix of recorded, on-demand/catch-up and streamed content. The programmes they do watch live tend to be either those which are time-sensitive, with extremely high levels of engagement (e.g. live sport) or those which are primarily used as background viewing (e.g. daytime TV).

I remember watching Glastonbury, because I wanted to go and I couldn't get tickets. I watched that live. International football and stuff like that.



Male, 19, student, Leeds



Do you know, I can't think of the last thing I watched live...[long pause]. I know... it was Sky Weather when [daughter] was out in Florida.

Female, 51, housing officer, Coventry

An eclectic range of sources inform viewing choices

Similarly, participants described using an increasingly eclectic range of sources to help inform their viewing choices, including printed guides, reviews and recommendations, blogs, word-of-mouth, social buzz, and in-app recommendations. This varied somewhat by life stage; some of the older participants specifically mentioned still using printed guides, whereas none of the younger participants claimed to be doing this. Some younger participants described social media buzz around programmes as influencing viewing choices.

The only thing I struggle with on Sky [EPG] is having to scroll down and across... it's quite a limited view. So 80% of the time we still use the magazine that comes with the weekend paper. It's really good because it will highlight what's a drama, what's a film, what's new and so on. So in the midst of loads of black and white text your eye can be drawn to the different colours.



Female, 51, housing officer, Coventry

[Recommendations are] quite useful really, because I like prison programmes – dark, morbid stuff like that. So if I've got something on Netflix that I have liked, like *Russia's Toughest Prisons*, it comes up with things similar to that so I would just click on it and watch that. It narrows it down because there's just so much stuff on Netflix.



Female, 25, student, Edinburgh

Most participants now have access to at least one subscription service

Most participants (13/19) now have access to at least one subscription video service (including Netflix, Amazon Prime Video and NOW TV), and several have access to multiple such services. Of these, Netflix was by far the most prominent, with 12 active subscriptions at the time of the fieldwork. On the whole, such services were seen as offering good value for money. The increased penetration of subscription services can be accounted for in part by participants taking advantage of shared account features, so they might have access – particularly to a second or third service – via a friend or family member's account.

A friend has given me his Amazon Prime password, which was very nice of him. *Man in the High Castle* – that was something I really wanted to watch on there, but I haven't really watched anything since. Now that Netflix have all these original shows, they just seem to put them out at such a prolific rate that there's always something new or interesting to watch on there.



Male, 21, tutor, London

There was a demographic skew (young and male) in the use of these services. All but one of our male participants had access to at least one service, whereas the oldest five women in the sample did not, accounting for the majority of those who were not using them.

Participants described different levels of engagement with viewing

Participants described different types of viewing – and different levels of engagement – with different types of content. They seem to be consciously segmenting their viewing accordingly.

Low-engagement content (often described as ‘background viewing’) was typically provided by the mainstream channels, and often watched at the time of broadcast. Daytime TV was the most obvious and common example of this.

High-engagement content was described as coming from a variety of sources including mainstream channels (although most often consumed on-demand or recorded), streamed box sets and films, and (for many) live sport.



There are two kind of levels of watching. The TV sits next to my computer. If I'm doing something on the computer that doesn't take 100% concentration I will have the television on in the background and it can be anything basically... [e.g.] the antiques show that's on just before the One o'Clock News, and because the news is so depressing I usually turn the news off at that stage. I enjoy watching the scandi noir dramas... or the box sets – once I get started on those we usually go through them pretty quickly.

Male, 73, retired, Warwick

Most of the time during the week I'm watching TV to fill in space, normally in the evening between getting home and going to bed, so I don't tend to commit to a great deal. When I do sit down and watch it properly, or I've got some time at the weekend it will normally be sport, and then Sky films and Netflix, I guess.



Male, 34, banker, London



I feel like it's something that I haven't experienced. It has almost become a hobby. I'm trawling through looking for box sets. I would never ever have done that years ago... I feel like a child in a sweet shop sometimes.

Female, 51, housing officer, Coventry

Netflix has developed a strong reputation for breadth and depth of high quality content

Netflix seems to have become both more highly regarded and much more important to our participants this year. It was particularly valued for its box sets, although the majority of subscribers were critical of its selection of films.

For some, Netflix is a convenient platform for consuming series they might otherwise have accessed via other methods (e.g. BBC archive programmes such as *Luther*). However, many also praised the service's original content. For some participants *Netflix Original* has become a kitemark for high quality drama. It also carries a degree of kudos when discussing favourite programmes with friends.

I could never tell anyone at work that I watch *Emmerdale*, no way! But I watch all the new Marvel shows on there and we do talk about that at work.



Male, 31, station assistant, Birkenhead



I watched *Narcos* and *Orange is the New Black*. I'm sure they're both Netflix Originals. They were both really good. I was having this conversation with someone the other day. We were saying that they're actually producing really good stuff. It has got the stage now that when it says 'A Netflix Original' that's a good thing because it comes with a good reputation.

Female, 25, student, Edinburgh

As well as the quality of its drama series, Netflix was also widely praised for its breadth of choice. This is valued by viewers because they do not feel bound to invest their energy in an individual series; they can sample something that they might not otherwise try, and if they don't like it, they can easily cut their losses and move on to something else.

I think if you're watching TV you'll just watch a programme because it's there, but now with Netflix, because you have a whole library of stuff that you can access, it means that I'm only watching things that I'm interested in, or that I think I will enjoy.



Male, 21, tutor, London



It doesn't bother me now if I start watching a series and I'm not really getting into it. I'll abandon it knowing that there's so much more there. So I guess that we as consumers are a bit more brutal than we used to be.

Male, 38, web officer, Cardiff

Lastly, a few participants specifically mentioned the appeal of the personal profile feature within Netflix. They liked this concept of personalisation, a kind of 'for me' TV as opposed to what by extension they saw as the 'for everyone' mainstream channels.

It's on your terms and it does feel like a kind of personal thing as well. You've got your own account. When I click on mine everything is so personalised to me. Even the recommendations are things that I actually would watch... it's useful.



Female, 25, student, Edinburgh

Increased use of YouTube to access user-generated content

Alongside the growth in streaming services, a significant proportion of participants said they used YouTube to access user-generated content. Just under half described themselves as following specific channels/YouTubers, as well as searching for individual videos. Notably, this includes some of the older women in the sample who do not currently subscribe to streaming services (as described in section 5.3 above).

The appeal of such content is manifold. Some appreciated the breadth and diversity of content for specialist interests.



I was actually watching this morning. Some of them have YouTube channels with links. It's all so superficial but it does make dressing easier when they have an autumn edit – like “These are five jumpers I've bought for autumn.”

Female, 29, doctor, Bristol

Others praised the ability to view what they consider to be raw, first-hand footage of real events. Some considered this to be more trustworthy than what is presented in the mainstream media.

I prefer to watch it from the horse's mouth, from the people who have taken the videos... This one guy in America was right in the middle of all the tornados and stuff that was going on. Oh my goodness, the devastation of it all.



Female, 44, stay-at-home mum, rural Essex

Some participants even described using YouTube as a form of visual search engine, bypassing Google altogether because they preferred to see the results in the form of video rather than text. This echoes participants' positive attitudes to learning via video, rather than text, described in Section 3.6 above.



It's like Google. You're not using Google any more to search for something, reading about it. You're watching it first-hand. The longest clip is about ten minutes long and you don't mind watching that because you're getting all the information within a clip.

Male, 31, station assistant, Birkenhead

However, some participants did voice concerns (as they had done in previous years) about children accessing unsuitable content via YouTube. While acknowledging that there are some controls in place, they argued that content labelling issues can render these ineffective. Moreover, streetwise children can easily circumvent parental controls.

Even on the Minecraft videos there are men doing it, teaching them how to do it, and some of the language isn't great.



Male, 56, alarm fitter, Lisburn NI



It was labelled as Thomas the Tank Engine and it had Thomas the Tank on the beginning of it, but when you got into it there was this bloke having his head cut off. Where's the regulation on that? This is specifically targeted at children.

Female, 44, stay-at-home mum, rural Essex

6. Public service broadcasting

Participants praised high quality content on PSB channels, particularly drama

Most, if not all, participants felt there were high quality programmes on PSB channels such as BBC One, ITV1 and Channel 4. There was particular praise for several drama series on air on the BBC and ITV around the time of the fieldwork. These included *Doctor Foster* (BBC One), *Liar* (ITV1), *Peaky Blinders* (BBC Two), and *Cold Feet* (ITV1). There were also some positive mentions for other programmes including *The State* (Channel 4), *Our Girl* (BBC One) and *Upstart Crow* (BBC Two comedy).

I think in the last 12 months quite a lot of channels have surpassed themselves. There have been some really, really good dramas that have really caught my eye... I loved *Grantchester*... *Liar*, *Doctor Foster* – oh my God, *Doctor Foster*. I bet there's not a woman up and down the country who hasn't looked for a hair on her husband's jacket.



Female, 51, housing officer, Coventry



The dramas that we watch, most of them are on the BBC... You've got *Sherlock*... most, literally most of the dramas are on the BBC.

Female, 40, fundraising manager, Cardiff

I still think some of their [BBC] fictional content, like their dramas are good. I don't know, personally, I tend to prefer the slightly grittier stuff, and I think there is something about the BBC, like slightly gritty dramas, like British dramas that is difficult to replicate elsewhere. And you know, having been born and bred here, there is something that I enjoy about that, that you know it's difficult to find the equivalent elsewhere... they [BBC] do still add value there.



Male, 34, banker, London

There were differing opinions around the value of the PSBs, including the BBC

As well as drama, participants highlighted the value of other PSB content, including news, documentaries and local content, as well as more intellectually challenging content.



I do like the documentaries. I'm watching that guy just now, that's going on with Russia, that guy... Simon Reeve, over Russia. That's something else, isn't it.

Female, 73, retired, Edinburgh

More localised channels. The wife, she likes The One Show... but there's other programmes that are just to Northern Ireland, so she'll watch them on maybe BBC or UTV. But local, some more local ones are really good... when you see your own people talking on TV and all the different people you know, it's interesting.



Male, 56, alarm fitter, Lisburn, NI

Occasionally you come across a programme by the Open University that has been done for the BBC, or vice versa. And you know, they are, of course they have been selected to be on the mainstream media, but they really are very good and if you do come across them, they are really very helpful... I think that the broadcast media have got a function to serve, and I think that if you know, you're just sitting in front of a TV or radio and just receiving 'pap' it's a poor lookout, I mean, we need mental stimulation, or I need mental stimulation.



Male, 73, retired, Warwick

Many in the sample expressed strong support for the role played by the BBC and other PSB channels.



The licence fee is peanuts. You relate that to the cost of other media like Sky and even Netflix. You really are getting exceptional value for money.

Male, 73, retired, Warwick

Personally, I feel like there will always be a place for the main channels – like BBC One, BBC Two, ITV, stuff like that – because you've got your X Factors and people do love just sitting down with the family and watching telly on a Friday or Saturday night.



Female, 25, student, Edinburgh

However, some participants compared the *breadth* and *range* of the PSBs' content unfavourably with (for example) Netflix.



The BBC will come out with some 'worldies' like Peaky Blinders. BBC do have it sometimes, but it's a one-off.

Male, 31, station assistant, Birkenhead

There were also more vocal criticisms among a significant minority of the quality and/or impartiality of the BBC's news and current affairs output, with some participants questioning this for the first time, particularly (though not exclusively) in the context of the BBC's coverage of Brexit.

They do add value there [quality drama] but I would agree that the areas where they add that value seem to be smaller and smaller. And on top of that, the areas where you would traditionally have thought the BBC add that kind of value I think they're struggling in... You always thought of the BBC having this objectivity and this strength and seriousness to their reporting that wasn't necessarily represented elsewhere on other channels. I just don't necessarily feel that way about them any more.



Male, 34, banker, London

When asked the specific question, a significant proportion of participants claimed that it wouldn't affect them personally very much if the BBC didn't exist.



Would I miss it? I don't know, probably not really. There would only be a handful of programmes I think that I would miss.

Male, 43, engineer, rural Derbyshire

I guess I would say "Yeah, it's important that it's there" but I don't know why I would say that because I don't use it.



Female, 29, doctor, Bristol



A part of me thinks that it's good that it's there, and I think it serves a lot of people, but I do feel that in a few decades' time it is going to serve a lot fewer people.

Male, 21, tutor, London

People placed different levels of importance on content made in and reflecting the UK

A specific area of questioning in this year's interviews was the perceived importance of content made and/or set in the UK, and using UK talent.

For some participants, there was a strong continued appetite for UK-specific content. In particular, local content with specific relevance to their local area, either in terms of its subject matter or its production, was seen as both appealing and important. Such content was praised both for its relevance to their interests and for the perceived benefits it offered to the local economy. Welsh and Scottish participants were most likely to argue this case.



I do like British television more, even though there's nothing spectacular that British television does... It's real-life drama that we're watching.

Male, 31, station assistant, Birkenhead

I would say that it is important that an element of it [what is shown on TV] is British, because we're investing in it indirectly, aren't we, via the licence fee and things like that. So you'd like to think that they're giving opportunities to British people.



Female, 40, fundraising manager, Cardiff

However, other participants described how their attitudes have changed in recent years. Whereas in the past they might have praised UK television for being the best in the world, intelligent US-originated content on platforms such as Sky Atlantic and Netflix, and high-quality European drama such as that shown on BBC Four on Saturday evenings have made them more open-minded.



It doesn't really matter to me [where a programme is made]. It's the quality and the inventiveness that matters. The Wallander programmes... I watched those in Swedish and in English and both of them were really very well done... If we talk about English stuff, I feel as if we're not getting the quality from England and, if we are, it's following the formulae that have been adopted ad nauseam by the Americans.

Male, 73, retired, Warwick

The internationalisation of content production, and the relative success of UK talent in the United States, have also had an impact. Participants were pleased to have the opportunity to see some of the best UK actors in Hollywood films, subscription channels' original productions, and major global series such as *Game of Thrones*. This was even a source of pride for some.

Something like Harry Potter... the fact that it's an all-British cast shows that we have got actors out there who can do it... like Benedict Cumberbatch, he's brilliant. Henry Cavill – British actor. Tom Holland – British actor. They're coming through and getting used everywhere, which is great. Tom Hardy – amazing.



Male, 31, station assistant, Birkenhead

7. Regulation and standards

Participants demonstrated little understanding of how TV is regulated or how to complain if they see unsuitable content

When probed, participants demonstrated limited interest in and little knowledge of how TV is regulated. Awareness of the 9.00pm watershed was universal, but this was the only rule that was spontaneously mentioned.

Few participants claimed to understand the process for complaining, with much confusion in particular about who is responsible for regulating the BBC, with a mix of answers offered including its Governors, the BBC Trust and Ofcom.

I think that my knowledge is pretty superficial, but I know that if you have a complaint about a programme you can refer it to an ombudsman, and I guess Ofcom also has a role in that. And I suppose with the BBC you can always write to the Governors.



Male, 73, retired, Warwick

In practice, however, almost all believed that it would be easy to find out via Google how to complain, were they so inclined.



I've never actually done it... I suppose I'd Google where to complain if I was really annoyed about something, but most of the time I just think "What is the point?".

Female, 44, stay-at-home mum, rural Essex

Expectations of standards on different channels/platforms vary according to their perceived audience

Participants were not aware of specific rules governing content on different channels and platforms. However, they did think there were differences between channels' editorial policies. By and large they attributed this to the channels in question reflecting the tastes and standards of the audience for whom they were catering.

The BBC was expected to be most cautious about what it broadcasts because it has the broadest audience, is publicly owned and is therefore the most accountable and most closely scrutinised of all the broadcasters.

ITV was seen as the next most cautious, as it caters for a similar mainstream audience as the BBC. Channels 4, 5 and Sky were seen as being able to get away with a lot more.

I do feel like different channels have different ethical principles. So the BBC, because they're a bit more traditional, might have thought "This is a bit much [13 Reasons Why], let's not put this on", whereas Netflix is a channel that might not be as ethically concerned and put it on knowing that it would be controversial... They all have different ideas about what is acceptable and what isn't.



Male, 19, student, Leeds



Because you're paying for it [Sky], it's not part of your licence fee, they should be able to put on whatever they want. You won't get people paying for something just to complain about it.

Male, 43, engineer, rural Derbyshire

Participants were not aware of any specific regulations governing content on subscription services such as Netflix. However, they did expect that such companies would exercise a degree of caution/restraint as they would not want to alienate their customers.

The broader online sphere was generally seen as a free-for-all. Participants understood that Facebook, Google etc. operated differently than other channels, with a different model to traditional content publishers. However, there was a widespread feeling that these services could do more to control the content on their platforms if they wanted to, and some felt very strongly that they should be doing more, but none had any expectation that they would.

None of the participants had complained about content in the past year, and few felt inclined to do so

None of our participants had made any complaint about content in the past year. In most cases this was because they had not *wanted* to complain, either because they were not offended by any content they had seen or because they believed that the appropriate response was just to switch off the offending content.

Last week there was something in the paper about Amanda Holden's dresses on Britain's Got Talent. It was quite revealing and 600 people complained about it because it was before the watershed. If you don't like it, turn it off... Some people have got nothing better to do than complain.



Male, 43, engineer, rural Derbyshire

However, in a few cases – most commonly the oldest participants – there was some unease either about specific content, or about a perceived decline in moral standards on TV in general. A few of these participants had not complained because they thought their complaint would not be taken seriously.



If I got the chance I wouldn't write in or go on the internet. If I was stopped in the street and they asked me my opinion then I would tell them. Then again, when you're old your opinion doesn't count for a lot.

Female, 84, retired, Coventry

8. Radio, podcasts and music

Radio continues to play its traditional role for many (especially older) participants

The traditional role and importance of radio persists among some of our older participants. For them, the radio set remains at the heart of the home, or serves as an essential companion in their car. They claimed to appreciate its benefits both as an information source (news, traffic and travel, etc.) and as a provider of music to sing along to.



It's like the hub of the house really. The first person downstairs [in the morning] usually puts the radio on, but if that first person doesn't put the radio on, the other two will shout down "Put the radio on".

Female, 51, housing officer, Coventry

In my car it's always Radio 2, because I like the music on Radio 2... My grandson tells me I've got a song for everything... Funnily enough, my mother was the same.



Female, 73, retired, Edinburgh

However, the role of radio appears to be changing for some younger participants

Some of our younger participants claimed that music radio has now been largely supplanted in their media repertoire by music streaming services such as Spotify and Apple Music. This seemed to be most likely in the case of those individuals who were most engaged in listening to music, and discovering new music. For those for whom music is relatively unimportant background listening, music radio still satisfies this need.



I don't know if it's just because through Spotify and Soundcloud you can listen to any music that you want, everything's on it. I used to listen to the radio to listen to good music, but I feel like now if I wanted to listen to good music I would just shove it on my phone.

Female, 25, student, Edinburgh

Perhaps the most interesting development in 2017 was a significant increase in younger participants claiming to listen to speech content. This manifested itself in two ways.

First, participants listening to speech radio stations such as BBC Radio 4 and talkSPORT.

I think radio-wise, because I'm getting older, I really enjoy listening to BBC Radio Scotland or BBC4 [sic]. Those are the ones that I switch between because I'm not so interested in hearing music all the time.



Female, 25, student, Edinburgh



On a Saturday it plays a huge role (talkSPORT) because we're in the van and we can listen to all the sports coverage.

Male, 28, security guard, East Barnet

Secondly, a small resurgence of interest in speech-based podcasts.

I was on holiday in America about a month ago and we downloaded the Serial podcast. We were doing a bit of a road trip so we downloaded that. It's the first podcast series that I've listened to, and it was great, I loved it.



Female, 29, doctor, Bristol



There's so much out there now in the way of podcasts. There's so much good quality that covers so many genres, so many moods, lots of interesting people with lots of interesting things to say on different subjects. You can just take slices of what you're interested in, find people whose podcasts you really like and then just continue with them... I do find it really interesting and I do find that it's something that's really easy to pick up and put down. You can listen to twenty minutes of a podcast on the way to work, do a full day at work and then pick up where you left off, do another twenty minutes and before you know it you've listened to a full episode.

Male, 34, banker, London

9. Mobile

There was no evidence of participants' smartphone dependency becoming any less pronounced

In last year's report we wrote about participants' high level of dependency on their smartphones. There was no evidence of this declining in 2017.

As well as the smartphone's key role as a social media tool, many participants said it was playing an increasingly important role in their work life. This included using the phone to perform online tasks directly related to their job, such as responding to emails and messages, uploading information and photos to websites, staying connected to their home and family when travelling for work, or just as a solution to momentary boredom.



I'm on my phone at work quite a lot [checking social media]. If I'm with a patient I won't take my phone out and read it, but I will do as soon as I leave the room.

Female, 29, doctor, Bristol

As explained in section 4.3, many of our participants now have access to more mobile data than before, and this has modified their behaviour. They are now less reliant on wifi when away from home or out of the office. 'Hot-spot hunting' has become a much less common activity.

When I only had 2GB of data I would always go to Starbucks or to the library and quickly access their Wi-Fi to make sure I wasn't using up too much data. Now, because I've got unlimited Wi-Fi at home, so I'm not using any data there, I don't really worry about it too much. When I'm at clients' houses I guess I could ask for the Wi-Fi, but I don't necessarily see the need.



Male, 21, tutor, London

Some participants also said they were able to do more on their phone using mobile data (e.g. streaming content or using a broader range of apps) than they were able to do previously. They felt less need to 'ration' their data use.



It has alleviated a lot of stress because now I can use my phone for more things. I used to be quite careful about how I was using it, whereas now I can just use it whenever I want. It has allowed me to download more apps as well... which has made it more useful for university and for work.

Male, 19, student, Leeds

Tablets are being used less (across most of the sample) than before

Although still extremely important for some participants, tablets featured less prominently in our discussions about media use, with most of our sample, than they did in the years 2013-2015 in particular. Participants described two reasons why this might be the case:

First, there is less need to use a tablet to access catch-up TV and streaming video services (one of the primary roles mentioned by participants in previous waves) now that most people have access to internet-based services on their TV set.

Second, for many participants, over the last two to three years, their tablet has gone from being the newest to the oldest communications technology device in the household, superseded variously by new mobile handsets, laptops and/or internet-connected TV sets.

I use my MacBook for everything. I watch Netflix on there because it's really good quality and it's fast... I've only got three or four apps on there [iPad] and it's just terrible, I don't even use it to go on the internet. To be fair it is quite old now... I would rather just go on my phone or on my laptop.



Female, 25, student, Edinburgh

WhatsApp is now essential to most participants

Over the past few years, there has been a rapid increase in claimed use of WhatsApp among our sample. This year, the penetration of WhatsApp, and the frequency of its use have again increased. Fifteen of the 19 participants now use WhatsApp (another used to use it but stopped doing so after being sent indecent images); most find it essential.

There is a clear age split in our sample between those who do and don't use WhatsApp. All participants aged under 65 either currently use it or have done so in the past, whereas none of those aged over 65 has done so.

Users claimed that WhatsApp has replaced much of their texting activity, some calls, and some social media use (for day-to-day chat). The group chat function was described as convenient, sociable and free of some of the complications and distractions inherent in using social media platforms such as Facebook (e.g. no 'likes').



That's my most important one [app]. That's the main way that I stay in touch with people from Uni that live elsewhere, groups, my family, my niece, my boyfriend, everything is all on WhatsApp. I think my relationships would really suffer without WhatsApp.

Female, 29, doctor, Bristol

It's the easiest one to use, you can get hold of everyone, it's got all the functionality you need... You know, I'm not really interested in sending stuff on Snapchat.



Male, 34, banker, London

Most claimed to be in multiple groups based on family, interests, activities, and even specific events.



I've got a WhatsApp group with work, a WhatsApp group with the mums and my friends. If we're organising something as a family we can all chat at the same time and see the conversation.

Female, 40, fundraising manager, Cardiff

Attitudes towards WhatsApp among users were overwhelmingly positive. Some users mentioned one downside: the sheer volumes of messages received, which can be overwhelming to deal with.

My son's rugby, every single parent is on it. They'll put a message out and the next thing you know you've got 25 unopened messages. I've had to turn my notifications off for that. It used to ping like mad. They'll ask for availability for the Sunday and every parent will comment. Some parents have split up so they'll both comment...



Male, 43, engineer, rural Derbyshire

Mixed awareness of the removal of EU roaming charges

Participants displayed mixed levels of awareness of the abolition of EU roaming charges in summer 2017. Some had been aware of the change from the news media, others had discovered it when travelling abroad, and others were completely unaware.

Although the change was welcomed, some of those who had travelled to the EU since the new rules came into effect (a small minority of the sample) claimed the change had not in practice had much impact on their behaviour, particularly in relation to their use of mobile data. They argued that, in their experience, poor data signals in many holiday resorts meant that such a service – even if free – was effectively unusable.



When I went to Amsterdam I didn't have to pay at all... It made such a difference being able to access it normally... so we could use maps and access tram times so we could find our way to the hotel. I feel like that should be the norm.

Female, 25, Student, Edinburgh

You can use your phone for free abroad as well... I only used my phone in the hotel because they had hotel Wi-Fi. I wasn't using 4G at all out there [Zante]. The 4G was terrible anyway so I just didn't use it.



Male, 19, Student, Leeds

10. Security and privacy

Participants recounted fewer security issues this year, but one we did hear about was particularly sophisticated and concerning

Last year, several of our participants were the victims of A variety of security issues ranging from hacking to phishing. As we noted at the time, this was a marked increase on previous years. This year, the number of incidents reverted to the norm, although the nature of the specific example was perhaps more serious and concerning for the individual involved, and certainly more sophisticated than any previously reported.

The participant in question is a well-educated and media-aware banker in London. He was a victim of a case of identity theft which potentially involved coordinated security breaches on multiple platforms. A criminal impersonated him and contacted his mobile phone provider, made changes to his account details and effectively took control of his mobile phone number. This was then used to access his online banking service.

This participant was particularly shocked by this incident, having considered himself to be a well-informed and security-conscious media user. His conclusion was that nobody is safe from attack.

It was obviously a co-ordinated effort on several fronts, but there had to have been several breaches for that to have happened... Historically I've always been fairly conscientious about engaging with the internet or providing more information about myself and my accounts than I need to... It just makes it all the more worrying that this kind of thing can happen, and so easily as well.



Male, 34, banker, London

Moreover, he felt that, as a victim of this crime, there was no obvious place where he could find help and support. All the organisations implicated in the breach (mobile phone company, bank, etc.) were involved in only one link in the chain of events. None had an overview, and none – as he perceived it – demonstrated any real duty of care towards him.

What's also interesting is how you deal with that. There's no central body, there's nobody you can turn to, there's nobody that provides advice. It's really weird. You get mugged on the street, you call the Police, you have a conversation, they put you in touch with a support group, whatever. In this new world it just doesn't exist that way. Nobody gives you advice on what happened, who do you speak to, where did you go wrong, can I do better. There's nothing out there. It's a really obvious gap when you need to rely on it and it just doesn't exist... it's bonkers!



Male, 34, banker, London

Some participants are adopting a more cautious approach to privacy on social media

In terms of privacy, there was evidence in this year's interviews of participants demonstrating a more cautious approach to their personal data on social media, both in attitude and behaviour.

Some participants claimed to be more actively managing their privacy settings, but not always successfully. One participant suffered acute embarrassment when she inadvertently shared photos of her naked body on Google+ (it is not clear how this happened, although she believed that an app setting automatically uploaded all her photos to Google+).

For younger participants, education in school on the importance of privacy has led to a more cautious approach. Older participants learn mostly from experience, although there was some evidence of awareness of potential online privacy issues being increased by TV shows such as *Catfish* and *Hunted*.

The one that I like watching most is *Hunted*. It's surprising what the police can use. You don't think about what you put on Facebook, but then from that they can determine who you speak to, how often, where you potentially could be hiding...



Male, 31, station assistant, Birkenhead

Some participants (particularly those who had been educated about the risks at school) described themselves as being more aware than before about the potential risk posed by fake accounts/followers, and the potential for other users' online profiles to contain false information. Again, real-life experiences have made some users particularly wary, but others remain extremely naïve.



Obviously, I come across fake accounts that message you. Usually I'll just block them if I don't know them. Or sometimes you can tell if they've like only got one photo and then a strange name.

Female, 17, student, Warwick

Normally I don't accept, but I am intrigued to find out why this person wants to friend request me given we have got no clue as to who each other is. I just thought "I'm going to accept because I want to see what happens".



Female, 44, stay-at-home mum, rural Essex



Online you just don't know. It could be anyone's picture, it could be anyone's name. I go into it [online dating] with that knowledge... Every guy I've met looked nothing like the profile picture, absolutely nothing like it. They might look like the grandfather of the person in the profile picture, or their long-lost cousin... you get to know that everyone embellishes; they are what they would like to be.

Female, 56, casual worker, London

Concerns are growing about the sharing of personal data between platforms

In another notable development this year, several participants, for the first time, expressed concerns about the sharing of their personal data between platforms. In previous years most of our sample had been relatively relaxed about, for example, their browsing behaviour being used to target them with contextual advertising (this was explored in detail in 2012 and again in 2014).

Many are still comfortable with recommended content based on their previous behaviour (including advertising or sponsored content) being served up to them on an individual platform; for example, advertising for make-up within an Instagram feed where they follow bloggers who post information about make-up.

However, some considered that it was disconcerting to see ads on one platform based on their behaviour on another. This is compounded by the relatively limited knowledge, across the sample, about platform ownership, and partnerships between services.

I think it's quite weird. I don't know how they do it but they connect what you look for on the internet with adverts on Facebook... I was trying to find school trousers the other day and I found some but then on Facebook there were little pop-ups coming up of trousers. I find that a bit creepy.



Female, 17, student, Warwick

Despite such misgivings, participants continue (as in previous years) to admit that they rarely read the terms and conditions of sites and services for which they sign up. In an exceptional case, one participant was very shocked when he did read what he was agreeing to when using Google services.



We readily give up data without knowing because we want to have access to these apps. This data is harvested and people do all kinds of things with it and pass it on to other agencies and you don't even know that they're doing it.

Male, 34, banker, London

Participants described a wide variety of approaches towards passwords, PINs etc.

Participants described a diverse range of approaches and attitudes towards protecting their online identity via passwords, PINs, etc. There was no particular demographic skew to the use of different approaches; in general, people who claimed to have a good memory were the most likely to employ a more varied password/passcode strategy.

I have one [PIN] for banking, I have one for my phone lock, and one for my iPad lock, which are both different, and for my laptop as well, I have a lock on there... I'm finding myself with quite a lot of numbers that I need to remember, but I use them that often that I know them off by heart.



Male, 19, student, Leeds



I try to use different ones. I've only got a few that I use because I often forget them, even though I use them all the time. I do write them down in a safe place, but then I often forget where I've written them down.

Male, 43, engineer, rural Derbyshire

The adoption of biometric security measures such as fingerprint and retina scanning was relatively limited among our sample. Some liked such approaches because they felt that they are intrinsically more secure, but this was not without exception.

I've got a retina scanner and a fingerprint scanner on my phone but I just use a password. I did use the fingerprint, but one day when I was asleep my girlfriend picked up my hand and used it to unlock my phone, so I just use a password now.



Male, 28, security guard, East Barnet

Those with comparatively weak security strategies (e.g. using weak passwords and/or the same password across all their accounts) generally acknowledged this. They admitted that they should be more careful, and said that they had put off taking more precautions because they did not see it as a pressing concern. Bad personal experiences appear to be the main catalyst for adopting a more serious approach to online security.



We nearly lost our Facebook page for the business [as a result of hacking] which would have been dire. I think it has just made me more aware of the privacy settings, to watch out who is following you, not to like every random friend request.

Female, 40, fundraising manager, Cardiff

11. News

Increased role of mobile devices and apps in news consumption

Since the *Adults' Media Lives* study began in 2005 we have seen major changes in participants' consumption of news.

First, there has been a trend towards greater personalisation and fragmentation of news consumption, driven by the growing importance of the internet, the availability of a broader range of sources than before, and the influence of new and convenient devices and platforms as means of consuming news content. Second, the influence of social media as a way of accessing and sharing content has exposed participants to news providers they might otherwise know nothing about.

This year, there was evidence that mobile devices, and apps in particular, are playing a more prominent role in participants' news consumption. This is in part driven by the predominance of mobile devices in participants' social media use – news content shared over social media is now typically consumed on a mobile device. But there was also increased uptake reported both of news providers' own apps (e.g. BBC News) and news aggregator apps such as Apple News.

I get a morning newspaper and sometimes look at the news on TV, but my main medium for news is three apps on my phone. One is the BBC News, there's also the Guardian website, but the one that I go to first is a sort of assembly of the news which I think Apple produce... It has items of news from North America, from the Independent, the Guardian, from the Telegraph, the Sun. It really does encompass most of what I want to read about.



Male, 73, retired, Warwick

Participants demonstrate diverse attitudes towards news and news providers

In understanding overall trends in participants' attitudes towards news and news providers it is helpful to understand the different types of news consumer that exist within our sample, based on similar patterns of behaviour and attitudes. Our analysis of interviews over many years leads us to believe that there are four broad attitudinal types (each representing roughly a quarter of the overall sample).

Traditionalists have a utilitarian relationship with news, focusing on finding out just what they need to know to keep abreast of the headlines. They tend to engage with a small range of mainstream brands (typically just one or two, and usually including the BBC).

Explorers are more engaged in news content and more questioning of it. They tend to consume news on multiple platforms and from multiple sources, often going out of their way to seek out alternative points of view to better inform themselves.

The Suspicious are less trusting of mainstream news providers, preferring to “see for themselves” from first-hand sources. This is the group most likely to access news information from YouTube and/or more partisan independent sources.

Lastly, Avoiders seek to minimise their contact with news content, either because they are not interested, or because they want to protect themselves or their family from what they consider to be distressing content.

These categories do not map neatly along demographic lines, although all of the Explorers in our sample are men, and most of the Avoiders are women. Participants can also move from one group to another – most notably, some of those in the Suspicious group (the newest ‘type’ to emerge) would previously have been classified as Avoiders.

Increased diversity and internationalisation of news sources

Although the *Traditionalists* and *Avoiders* in the sample mostly still rely on just one or two sources – in so far as they engage with the news at all – others in the sample describe themselves as actively seeking an ever-broader range of sources.

These include overseas news outlets (both on TV and online) including CNN, The New York Times, France 24, and Next News Network, and individuals on the ground (for example participants in the recent demonstrations in Catalonia).



Because Twitter is multinational there are people from all over the world on it. You find yourself seeing a wider variety of news stations... You're seeing quite a few Spanish ones on there at the moment because of what's happening in Catalonia.

Male, 19, student, Leeds

How these diverse outlets contribute towards shaping participants' world views differs markedly between individuals. In some cases, this behaviour is part of a claimed conscious effort to avoid limiting themselves to an ‘echo chamber’ of opinions solely reflecting their own world view. Conversely, others appear to be gravitating towards more opinionated outlets precisely because they reflect their own views.

I think I'm trying to be a bit more aware of other voices out there. I've been on social media for a while and that has been quite a useful way for me to aggregate my news, but I also just step out of that now and again and look at the news websites as well, because I do understand that sometimes it's just an echo chamber – a reflection of what I believe as opposed to what is really going on.



Male, 38, web officer, Cardiff

Disillusionment with mainstream UK news providers

A number of participants said their increasing use of a diverse range of news sources was partly due to their disenchantment with the mainstream UK news providers.

Some participants continue to be angry about the outcome of the EU referendum, and the role of the mainstream news brands in this.



I think the news media have been fairly weak, to be honest. I wish they were a little bit stronger when holding politicians to account for spouting out quite unfactual [sic] stuff, you know? What I saw was the inability of the media to rip apart certain things that just came across as absolutely ridiculous.

Male, 38, web officer, Cardiff

In other cases, the growth in interest in user-generated content on YouTube (as described in section 5.6) has exposed participants to independent content providers which are sometimes intrinsically hostile to mainstream news providers. This had undoubtedly influenced the attitudes of some of the *Suspicious*.

There's a thing called the FLA – the Football Lads' Alliance – which was a massive march in London the other day. The BBC were there filming it and one of the gentlemen from a media channel called Rebel Media was filming this BBC reporter and asking him "What are you filming here today for?" and the reporter replied "We're here to film all these right-wing people marching through London". The guy from Rebel Media was, like "This isn't a right-wing march, this is a march against terrorism. Why would you portray it as a right-wing march?" which is exactly what they did the next day. I watched it.



Male, 28, security guard, East Barnet

Lastly, some of the *Explorers* in the sample put forward a broader view. They argued that the mainstream news providers have failed to adapt either to changes in the political environment or to the emergence of new and powerful online media forces.



I do think they've got that ethos [of impartiality]. I think that's what they feel they stand for and I think that's what they feel they're known for, but at the same time they exist in this new world of information being available so quickly, and things being sensationalised in a way that maybe is not in line with the way they might have done things before. They live in this 24-hour news cycle and I think part of trying to operate in that world has maybe compromised the values that you would have traditionally associated with them.

Male, 34, banker, London

Awareness of 'fake news'

It was perhaps not surprising to discover that all participants had at least some awareness or recognition of the term 'fake news'. However, many found it difficult to articulate what the phrase

actually means, and those who did attempt a definition gave diverse answers, suggesting that it means different things to different people.

I'd say it's celebrities who are popular at the time – like the Kardashians – and people write bad things about them. That sort of magazine news on the internet. I don't see a lot of fake news about serious things.



Female, 17, student, Warwick

Fake news has always existed. Maybe it hasn't been so prominent before. What has changed is that it has been coined and given a platform. It doesn't mean that it's not real, but then everything is bucketed in together. Anything that somebody doesn't want to hear, that they don't want to know, that they don't agree with becomes 'fake news'... It has just become a tag line to attack things.



Male, 34, banker, London

Similarly, few participants were able to cite concrete examples of fake news.

I know people are talking about it, but I've not really seen it myself.

















Female, 25, student, Edinburgh

If you're looking at news from a number of sources you can judge which the fake news articles are. It's in retrospect that you hear that a particular incident didn't happen.



Male, 73, retired, Warwick

A1. Summary profile of wave 13 participants

Icon	Sex	Age	Job	Location	Years in study
	F	17	Student	Warwick	4
	M	19	Student	Leeds	5
	M	22	Tutor	London	4
	F	25	Student	Edinburgh	10
	M	28	Security guard	East Barnet	12
	F	29	Doctor	Bristol	12
	M	31	Station assistant	Birkenhead	2
	M	34	Banker	London	13
	M	38	Web officer	Cardiff	12
	F	40	Fundraising manager	Cardiff	12
	M	43	Engineer	Rural Derbyshire	13
	F	44	Stay-at-home mum	Rural Essex	12
	F	51	Housing officer	Coventry	13
	M	56	Alarm fitter	Lisburn, NI	10

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	F	56	Casual worker	London	12
	M	63	Semi-retired	Pinner	12
	F	73	Retired	Edinburgh	10
	M	73	Retired	Warwick	1
	F	84	Retired	Coventry	13