Adults' Media Lives 2016: A qualitative study

Wave 12 Summary Report

About this document

This document provides analysis of the 2016 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, in particular, 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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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 provide a human face to the data.

This 12-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. Twelve waves of research have now been conducted; the first was in February 2005, with subsequent waves in October 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015 and 2016. The most recent interviews were conducted between 7 October and 2 November 2016 by Mark Ellis, Tony Harbron and Tony Palmer of The Knowledge Agency. (One of our long-term participants was on a work placement in Australia at the time of this year's fieldwork. Her interview was conducted via Skype.)

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 (including all four nations), 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 19 participants in the latest round of interviews have been part of the study since the start (2005), and seven more joined the study in 2006. As the profile of the sample becomes – by definition – progressively older, we have regularly recruited new participants at the bottom end of the age range. 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 12 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;

- Concerns about privacy, security and safety.

However, the research model is flexible enough to explore specific topical and/or emerging issues each year; for example, (in 2016) attitudes to media coverage of the EU Referendum, the US presidential election campaign (ongoing at the time of the fieldwork) and the Rio Olympics.

All interviews are filmed, and video is the main vehicle for the presentation of findings from the research. The key insights from each individual interview have been clipped and catalogued by theme, platform and participant, each year of the study. 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. Video clips from *Adults' Media Lives* are used by Ofcom colleagues and academics to illustrate the consumer/citizen experience in a range of Ofcom policy areas.

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

Section 2

Overview

Key insights from the 2016 wave include:

- **Living in an increasingly connected world** has changed our participants' lives (section 3). The internet provides most of our participants with more convenient access to information and services, and – for some – opportunities for new and more flexible ways of working. But some expressed concerns that it is becoming more difficult to interact with local government services in any other way than online. Lack of face-to-face or telephone interaction proved either more difficult and/or led to an inferior service, especially for those who lack online skills (particularly the elderly).

- Participants are becoming increasingly **dependent on their smartphones** as these devices become more powerful, and mobile internet access becomes better and more affordable (section 4). The smartphone fulfils the role of a range of other devices with varying degrees of success, and as a social media tool it is uniquely fit-for-purpose. An over-dependence on smartphones can, however, be seen as one of the main examples of anti-social media use.

- **Mobile data has become an increasingly important commodity** for many of our participants as their dependence on smartphones grows (section 5). This is now perhaps the most important consideration when choosing a mobile phone provider/package, and participants describe themselves adopting a range of different strategies to ensure that they have enough data allowance to conduct necessary tasks without incurring unexpected charges.

- Almost all of our sample now have at least **some contact with social media** (section 6) and, as new services emerge and others evolve, there are more and more overlaps in functionality between a wide range of platforms used in different ways by different people. This leads to a complex web of social media connections. In 2016 we saw strong growth in the claimed use of messaging apps, in particular, *WhatsApp*. These apps provide access to closed discussion networks (e.g. family and friendship groups, work colleagues) via group chat functions which are praised for their immediacy, flexibility and (relative) privacy.

- Messaging apps are also an increasingly popular way for many of our participants to **share content online** (section 7). This reflects an increased sensitivity and caution across much of the sample about what they post, how, where and to whom. All describe themselves as acting in ways that demonstrate some degree of reputation-consciousness, either out of concern for their future career prospects (typically younger participants), or because of the impact on other people's good opinion of them (more likely among older participants).

- In 2016, many participants claimed to be more aware than ever of **privacy and/or security issues** (section 8). They voice a range of concerns, from the relatively trivial (exposing themselves to spam/marketing messages) to the more serious and insidious (fraud, 'snooping' authorities/employers, and personal safety). Around a quarter of our sample reported either direct or indirect personal experience of security issues this year – including examples of social media hacking, ransomware and phishing attacks. Some have adopted more stringent security measures in response, while others have withdrawn from some online activities.

- Although the experiences of specific **consumer problems** among our small sample cannot be viewed as any kind of trend, there are recurring themes in the stories which help us identify consumers' common sources of frustration when dealing with suppliers (section 9). These include not receiving the (premium) service advertised, suppliers changing the terms of the service customers originally signed up to, prices increasing beyond what is deemed reasonable, and communication problems (such as being forced to repeat the same conversation with different customer service representatives).

- The **internet continues to be a valuable source of learning** for the majority of our sample (section 10). Google and YouTube are often the first ports of call for learning how to do anything practical. Some participants who are already confident online users (typically the most highly-educated members of the sample) also described themselves making use of a growing range of academic and/or cultural learning opportunities via e-learning platforms such as Udemy and Highbrow. As a result, the differences between information haves and have-nots may be becoming more pronounced.

- In terms of **TV, radio and streaming content** (section 11), the long-term trend towards greater use of on-demand services across a variety of devices has continued. Many participants report marginally more use of catch-up services and box sets at the expense of live or recorded TV, slightly more use of premium streaming services, and marginally more viewing on mobile phones and tablets. However, popular mainstream programmes still have broad appeal across our sample and, in particular, the soaps and popular reality shows like *The Great British Bake Off* continue to demonstrate the capacity to unite generations of viewers. Although the Public Service Broadcasting (PSB) channels are not seen as having a monopoly on high quality programming, most participants claim that they are still producing strong content.

- Awareness and understanding of **funding and regulation** among our sample is limited (section 12). Although some participants believe that the rules governing standards of taste and decency on TV may have been relaxed in recent years, they still see a marked difference between what is broadcast on mainstream media and what is available online. Increasingly, the content provider brand, as much as the platform, shapes expectations about what kind of standards to expect.

- Lastly, most participants claimed to be broadly comfortable with the status quo in terms of **TV advertising** (section 13). They appreciate its importance as a funding mechanism, and are comfortable with it in its current form. There were, however, negative comments about what some participants perceived to be more aggressive and intrusive online advertising (e.g. an increase in embedded video ads). Some also expressed mixed feelings about some forms of native content, and, in particular, the way some YouTubers and social media celebrities promote products, often to young and impressionable audiences.

Section 3

Living in a connected world

Over the 12 years of *Adults'* Media Lives we have seen an evolution in the role of the internet in our participants' lives. Whereas in the early years of the study going online was seen as a stand-alone activity, the internet is now seen as increasingly integral to many facets of our participants' lives, whether they like it or not. It is an essential tool which facilitates many activities, but also increasingly dictates how people interact with the world around them, and can even, in some cases, restrict their ability to do so. Participants describe themselves accessing news and information, consuming content, and interacting with authorities, institutions and each other online. User experiences across TV, news and social media are becoming increasingly personalised and fragmented.

Participants quoted many examples of the internet providing more convenient access to information and services. In some cases, this creates opportunities; for example, for new and more flexible ways of working. One participant (a young mother) has set up an online business with her partner, organising specialist holidays. She is developing this in parallel with her day job, but is planning to become full-time self-employed as soon as is feasible. As a result, she has had to learn a range of new skills, and is interacting with others via her website and social media in a far more proactive way than she had done previously.

> **I'm not a blogger, but now we've set up a blog on the website I've had to learn how to do that, how to alter our own website and things like that.**

Female, 39, fundraising manager, Cardiff

On the other hand, some participants expressed concern that it is becoming more and more difficult to interact with local government/services/institutions in any other way than online. In some cases, interacting online, rather than face-to-face or by phone, can prove more difficult and/or lead to an inferior service.

> **The bin broke. The only way you can report it so that you can get a new bin is through the internet. Could I find a telephone number? Could I dash! That's all very well if you've got the internet, but there's still a number of people who don't… Of course, they're trying to save money, and I know exactly where they're coming from, but sometimes… It took them three days to answer.**

Male, 62, semi-retired, Pinner

Although some of the examples cited were relatively trivial, it was also notable this year that some of the online interactions described were increasingly important; for example, claiming benefits, applying for a university place, or making a will. The stakes are higher in these cases. When participants (particularly older people) experience problems, this leads to real worry and frustration. Some even described themselves (or others) as feeling disadvantaged compared to confident internet users.

> **So, I went online to see what she [elderly friend] would be entitled to, but it's a 32-page document that she would have to fill in. She doesn't have a computer. And I thought "Do I really want to get involved in all this?".**

Female, 72, retired, Edinburgh

> **I'd be frightened I'd make a mistake. It's an important thing [making a will]. It's got to be done properly. And there are a lot of questions you can ask when you're sitting in front of a person, not in front of a machine.**

Female, 83, retired, Coventry

As the internet has become an essential utility for many of our sample, being deprived of access to it (either because of technical issues or because mobile data limits have been exhausted) is increasingly likely to be a source of frustration.

> **I went on holiday and didn't have any wi-fi and couldn't use 3G and I really [struggled]… Every time I got to a restaurant I was, like, "Do you have wi-fi?"… It was very hard.**

Female, 16, student, Warwick

Living in a connected world: case study

Sally and her daughter's university application

Sally's teenage daughter applied to university in 2016.

Having achieved better-than-expected A level results, she went through clearing, and was offered a place on her first-choice course at nearby Birmingham University. However, there was a strict time limit of 24 hours for responding to the offer.

It was only possible to respond online and, because of the importance of the process, Sally's daughter asked Sally to help her complete the online forms. What should have been a relatively straightforward process turned out to be an extremely long and stressful experience for both of them (it later turned out that the university admissions team had sent the wrong link).

> She got an unconditional offer at Birmingham Uni. Nothing is done via sending in by post or on the telephone. Everything had to be done on the computer.
>
> We opened up the link and thought "fantastic" - the link opened up and we started answering the questions, thinking "this is going well" because it did say that it wouldn't take any more than 15 minutes. Two and a half hours later, we couldn't get any further.
>
> So, I rang them up and said "Is it possible for us to come in? It'll take us 20 minutes to come in and deliver all of this." And they said "No, no, we can't accept anything by post, it has got to come in over the computer".

Sally, 50, housing officer, Coventry

Eventually the correct link was sent through. Sally and her daughter were then able to complete the application process successfully, and Sally's daughter is now a first-year student at Birmingham.

Section 4

Smartphone dependency

As access to the internet has become increasingly important to our sample, and more of this access takes place on the move, smartphones have become an essential tool for navigating daily life.

In the 2015 wave of *Adults' Media Lives*[1] we explored in detail the relationship between participants and their smartphones. Ofcom has subsequently published further dedicated research in this area[2].

In 2016, the smartphone continued to be the device the majority of our sample would least like to live without. Indeed, the language they use to describe their relationship with their smartphone, and the degree to which they are dependent on it, has noticeably intensified over the past year.

> **If I walked out of the house without my phone, I would feel probably like my left or right leg has been chopped off.**

Male, 42, engineer, rural Derbyshire

> **I've never got my phone out of my hand. Even now I don't have my phone, my phone's in the other room and I'm thinking "Aaaarghhh, I want my phone on me".**

Female, 24, student, Edinburgh

> **I absolutely can't imagine functioning without a phone as we know phones today.**

Male, 33, banker, London

The smartphone is seen as fulfilling the role of a range of other devices – including TV, radio and laptop – with varying degrees of success.

> **I know that with a mobile, at its very basic, I could phone family, friends and have that interaction with them. Of course, now a mobile phone means much more. Partially it's a tablet. There are elements of TV, radio and PC on there as well.**

Male, 37, web officer, Cardiff

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[1] Ofcom Adults' Media Lives reports: https://www.ofcom.org.uk/research-and-data/media-literacy-research/media-lives

[2] Ofcom Smartphone by Default report: https://www.ofcom.org.uk/research-and-data/telecoms-research/smartphone-by-default-2016

> **You can listen to music, so you don't need the radio. You can watch telly on your phone, so you don't need the TV ...**

Female, 16, student, Warwick

However, there remain certain applications where most participants would prefer not to use a smartphone, for example school and college work (and other applications where participants need to write more than a few words and/or use a printer), and (for many) watching TV. Tablets, with their larger screens, are preferred in this instance.

> **I find it much easier to do my university work, and research and reading on my laptop.**

Female, 24, student, Edinburgh

> **The lack of a big screen would mean that part [watching TV] would be out of the window for me because I wouldn't want to sit there looking at a small screen. I think it's manageable on a tablet, but on a mobile that would be the key thing I would struggle with.**

Male, 37, web officer, Cardiff

As a social media tool the smartphone is uniquely fit for purpose. It is portable, always online (for many) and provides instant access to social media apps. This is evidenced by the growing popularity of WhatsApp – a smartphone-native social media platform which is becoming an increasingly important part of media life for around half of our participants. (For more research findings on WhatsApp, see section 6, below.)

Through the proliferation of apps like WhatsApp, the smartphone has become a social umbilical cord linking people to their peer group all day, every day.

> **I use WhatsApp all the time. I hardly ever text. I use it for everything. It's easier, it's informal… If one of my girlfriends loses her phone and can't be part of the group chats, she misses out so much.**

Female, 24, student, Edinburgh

However, attitudes towards our dependency on smartphones are not universally positive. Several participants were highly critical of other people's use of smartphones in family situations and/or in public places.

We only went out for an hour's walk. I think she spent three-quarters of an hour answering [messages]. "Hang on," she said "I just need to text this person back… I just need to ring this person." And I thought "We were meant to be going out for a walk!".

Female, 50, housing officer, Coventry

My son will come downstairs to get a cup of tea or a drink. He'll come down with his phone, put it down, get a drink, pick his phone up and walk off with it. I ask him "Why have you brought your phone down with you? No-one's going to phone you." No-one ever phones him. But he's on Instagram… [He's worried that] he might miss something.

Male, 42, engineer, rural Derbyshire

Moreover, some participants acknowledge they *themselves* are perhaps too dependent, describing smartphone use as a habit which can become addictive.

Mobile is for social networking. I use that all the time. I'm always looking at it. I'll find myself on Twitter when I'm just walking along …

Male, 18, student, Leeds

I don't think I'm addicted to it but if it's not there… It's almost like you're going cold turkey because you're going [pats pockets] "Where's my phone? I need my phone… where is it?"

Male, 42, engineer, rural Derbyshire

I feel myself reaching for it out of… I wouldn't say boredom; it's *fidgeting*… If I'm leaving the office and nipping out for something to eat or something, I'll go to the lift. There are 30 seconds when there's nothing to take my attention. What do I do? I take my phone out.

Male, 33, banker, London

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Section 5

Mobile data use

When talking to participants who have either switched mobile provider or upgraded their phone or package, it becomes clear that data use (either actual or anticipated) is becoming increasingly important in their decision making – and is perhaps now *the* most important factor for many.

> **We paid a little bit extra on top of the contract so that I could get unlimited internet because that was a necessity. With my [basic] contract, that wasn't enough.**

Female, 16, student, Warwick

> **My wife's contract expired and at that time I negotiated for her to come over to my EE account… We've got shared data, so instead of having say 2GB or 4GB each, we upped it to 10GB between us… We've never gone over that.**

Male, 37, web officer, Cardiff

However, compared with easily understood metrics like the amount of call time or number of texts in a package, understanding data is still relatively problematic. Confusion persists about, for example, how much audio/video streaming is possible with a certain amount of data, and many participants are not sure about when and where their phone apps might be using data in the background.

> **I've got the highest package for a phone that you can get… and I still ran out of data… When you're paying £60 a month surely you shouldn't have to pay any more. Unlimited internet should mean unlimited internet, not unlimited internet and then in small print underneath it says like 2GB, or whatever… I don't know how it works.**

Male, 27, bar manager, East Barnet

Although some participants said they found data usage alerts from their mobile provider to be useful and effective in monitoring their data use, these were not necessarily enough in themselves to prevent users encountering problems, especially if they discover, for example, that they have used nearly all of their data early in the month.

Participants have reacted to potential data problems in different ways. Some have pre-empted them, by upgrading their contracts to make sure their routine needs are covered and they are not exposed to high, unforeseen charges, while others are topping up with data on an ad-hoc basis.

> **I put more [data] on there because [my daughter] – bless her heart – when we're out and about she uses a lot of data. So, I've got a lot of data on there. I keep telling her to look for the wi-fi signal but she's obviously too engrossed in what she's watching.**

Female, 39, fundraising manager, Cardiff

> **I think it's 8GB for the $50 I top up a month, but then I always have to buy extra data because the wi-fi in the flat isn't very good.**

Female, 28, doctor, Perth, Australia (placement)

Some participants described themselves adopting data-rationing tactics when travelling abroad (and when running low on data at home). These include modifying their online behaviour, choosing to eat and drink at specific venues to get access to free wi-fi, and (at the most extreme) leaving their device switched off to ensure it does not 'roam'.

> **When I get to 80% [of data allowance used] I try to use it as little as possible. I put it into airplane mode as much as I can when I'm out and only switch it on when I need to do something. At 100% I just don't use it.**

Male, 18, student, Leeds

> **I've been abroad a couple of times over the last year. I just set up the roaming stuff on my phone. I usually just do that when I get there. But what I try and do is mix it with wi-fi in different places and take the opportunity to do most of my downloading or searching or whatever while I'm in a place with wi-fi.**

Male, 37, web officer, Cardiff

> **I turned the phone off, turned the mobile data off, kept the phone off and just checked it once or twice a day [on holiday abroad]. That's basically all I did.**

Male, 55, alarm fitter, Lisburn, NI

Mobile data use: case study

Tim's black box

Tim is a first-year student in Leeds. As he has adjusted to life as a student, including living in halls, he has encountered some problems with unexpected data charges.

He is extremely price-sensitive and has come up with an unconventional solution to his data needs. Rather than changing to a contract with a higher data provision or paying to top up his data allowance, he has taken on an additional contract for a mobile modem, which he uses as a personal hotspot for his phone.

> Because I was going over my contract limit with data… they suggested this [to use] when I'm out and about and there's nowhere to connect [to wi-fi].
>
> It gives me an extra 3GB of data, or something like that. Basically, it adds £10 onto my contract, but it saves me money, because last month I went like £20 over, so they said it would save me money.

Male, 18, student, Leeds

Section 6

Social media

Over recent years of the *Adults' Media Lives* study we have noticed several trends in terms of participants' use of, and attitudes towards, social media. More participants have become active on social media, and those who are active are spending progressively more time using it, and use an increasingly diverse portfolio of social media services. And younger participants, in particular, are becoming more circumspect in what they post on social media, either as a result of education or because of their own bad experiences online. All of these trends have, to varying degrees, continued in this year's wave.

Almost all of our sample now have at least some contact with social media. And, two of our oldest respondents described themselves browsing content for the first time on Facebook this year, although they are not posting on social media.

> **We were doing a show for the homeless. Unknown to me somebody must have been recording it. One day my grandson said "Gran, I didn't know you were on Facebook" and I said "Facebook? I'm not on Facebook!" and he said "Yes you are… you're in a choir, singing." And there I was …**

Female, 72, retired, Edinburgh

> **I do have a look every now and then just out of curiosity.**

Female, 80, retired, Bucks

As new social media services emerge and others evolve, there are more and more overlaps in functionality between a wide range of platforms, which are used in different ways by different people. This leads to a complex web of social media connections. So, in 2016, we heard about:

- different individuals using different platforms for the same purpose. For example, group messaging conducted by some via Facebook Messenger, versus others messaging via WhatsApp; and

- the same individual using different platforms for the same purpose depending on the make-up of the social circle with which they are interacting, and when the group was formed – one university student participating in group chats with former school friends on WhatsApp, but with university friends on Messenger.

> **A lot of my friends from home were using WhatsApp, so this summer when they were Inter-Railing and I met them for four or five days in Budapest, all of that conversation was done over WhatsApp.**

Male, 18, student, Leeds

In 2016 we noticed particularly strong growth in the claimed use of group messaging functions/apps, and especially WhatsApp, which was seen to offer numerous benefits to users. As well as offering the ability to participate easily in group discussions, WhatsApp was praised as a free, and better, alternative to texting, especially when sharing images and other media. The ability to see when a recipient has read your message was also a liked feature – although some participants felt that this did lead to their feeling unwelcome pressure to read/respond to messages more promptly.

> **Other than WhatsApp I don't rely on any of them [social media services]. Quite a few of them are nice-to-haves and I enjoy using them, but I don't rely on any of them. WhatsApp is the only one I would use every single day.**

Male, 33, banker, London

> **It's my main link to all my friends back home. And my family have a group where we share photos of my niece, usually. I would just feel so cut off from people if I didn't have WhatsApp.**

Female, 28, doctor, Perth, Australia (placement)

> **The ability to have groups, where you can all chat simultaneously in what feels much more like a forum than a group text message, and the fact that it's instantaneous in a way that a text message just doesn't feel like it is. And actually, when you look at it technically, they're kind of the same thing, but a text message just doesn't *feel* the same.**

Male, 33, Banker, London

Indeed, perhaps the most noteworthy development this year, as a result of the proliferation in group messaging apps, has been the growth in importance of *closed* discussion networks based on family or friendship groups, united by circumstance (e.g. work or student peer-groups) or by a common interest. Most users are part of several of these types of groups, and much of their day-to-day communication now happens through these, rather than (as in previous years) on more open platforms such as Facebook or Twitter (or, before that, Bebo, MySpace, etc.), via text or phone.

However, the growth of closed networks is not restricted to messaging apps. Participants have also described themselves as being part of Facebook groups based on social groupings (such as school parents' groups) or specific interests.

Me and my wife, my two sisters and their husbands, any family business that we need to speak about, that our parents are coming to us about, family discussions happen on there [*WhatsApp*].

Male, 30, retail manager, Birkenhead

We've got a bar group chat where everyone from the bar is in the group, and if a new product comes in, or if you have to change your shift or something like that you can speak to multiple people at once.

Male, 27, bar manager, East Barnet

Section 7

Sharing, etiquette and online reputation

Participants variously describe themselves sharing content which is especially touching or funny, is likely to be of specific relevance or interest to their friends/family (especially relevant *local* content and information), or which celebrates a particular event or achievement of theirs or their friends. Sharing (and indeed liking) social media content is at times motivated by a desire to spread the word to a wider audience, and at other times by wanting to show support/empathy for the original author.

> **I will share stuff if it's local. I will share it if I think it's important. For example, there was an attempted abduction of a young child from a school around here and it was on PDN, which is a Facebook-based news thing for this particular town. I shared that because that really bothered me, obviously, as a mum of a young child.**

Female, 39, fundraising manager, Cardiff

> **Last Sunday I did the Oxford half marathon and my friend took a picture of me at the end. I put that on Facebook. Usually it will be social meet-ups, or personal things that I've done, rather than sharing information from other sources.**

Male, 20, student, Oxford

> **There was one that I shared the other week with the triathlon Brownlee brothers… one of them was really struggling and the other one sort of pushed him across the line. That was like a news thing and I shared that, so you do still share news stories.**

Female, 16, student, Warwick

> **If I've *liked* something that a friend's put up, they get alerted to the fact that I've liked it. Then we have a shared appreciation of whatever it is that they're trying to share… They know that you like it… *Sharing* is getting it out there to the world if you want to.**

Female, 39, fundraising manager, Cardiff

Some younger participants claimed to be more likely now to share content via a messaging app such as WhatsApp or Snapchat than on a traditional social media platform like Facebook - in part because it is more targeted, but also because they perceived it to be quicker and easier (due to using it more often).

> **There are certainly a few people in your life, you think the same way, you think they're interested in the same kind of things. You have certain conversations with them [on WhatsApp] and you share quite a lot of content with them.**

Male, 33, banker, London

> **I guess it is kind of more private. I don't think that's necessarily my thinking behind it, I think that's just what we do now. It's just quite a lot of effort to go on Facebook and post a photo whereas it's a lot easier to do it via WhatsApp.**

Female, 28, doctor, Perth, Australia (placement)

In the 2015 wave of *Adults' Media Lives*, we presented evidence of participants being more sensitive/cautious about what they post, how and to whom. In 2016, participants again talked about being concerned about what they post where. This is informed – in part – by their own experience of seeing offensive or abusive content and comments online. Although none of our participants had been directly targeted themselves (as some had in previous years) some were conscious of other people they knew being targeted, and this was a cause of concern.

> **One of the kids around here, that [son] went to school with, is now in prison for drugs. Everyone round here knows him and his family. People were putting really horrible things on there [Facebook]… so I just wrote "Those that cast the first stone should be without sin", because I was thinking "You don't know the family. You don't know what happened. You don't know what they've been through."**

Female, 43, stay-at-home mum, Essex

Although few admit to curating an online persona, all of our participants do describe themselves acting in ways that demonstrate some degree of reputation-consciousness. This is particularly true on certain platforms, where there is a broader and more anonymous audience (such as Twitter or Instagram). Participants recognise that there is a trade-off between the popularity/notoriety (likes, shares, etc.) and the potential for collateral damage.

> **[On Twitter] you have to really think about what you're writing. You want to make a good impression on the people that follow you. Do you want to be humorous with that statement? Do you want to be informative? Is it sad? Do you want people to go "yeah, I can really relate to that"?**

Female, 16, student, Warwick

In 2015, one of our younger participants admitted to consciously trying to project an exciting and glamorous image of her life by posting selective verbal and visual content on Instagram and Tumblr. Although no longer on Tumblr, in 2016 she had continued a similar form of image curation on Instagram and Twitter, and made a clear distinction between those platforms – where her posts would be seen by more than just her immediate set of online friends – and more private discussions on platforms such as Snapchat.

> **I want to make a good impression of myself – that's more for Instagram than any other [platform]. Instagram has other people following you, like friends of friends, whereas on Snapchat and Facebook I've just got my friends… Instagram is more for people to see what you're doing, what you look like. Whereas Twitter is more about making an impression of yourself.**

Female, 16, student, Warwick

Younger participants, in particular, continue to be concerned about the potential negative impact on their future prospects of what they post online, whereas older participants are more likely to be concerned about the impact on other people's opinion of them.

> **People like my great-auntie have about 20 friends on Facebook so if you do anything it will appear on her feed. And even if someone tags you in something and you reply to it [it will appear] so you have to be very careful about what you post because you don't want to make your family think you worship the devil or something like that!**

Male, 20, student, Oxford

> **I've always been really conscious about what I post on there because they do educate us at school about what you put up and what you don't. As I'm getting older and thinking more about job interviews and uni interviews I'm more likely to think "Should I really be posting this?"**

Female, 16, student, Warwick

> **A lot of my friends don't believe in God or anything at all, so you've got to find a happy medium otherwise they'll say "You're going church-mad again!"**

Female, 43, stay-at-home mum, Essex

Similarly, other people's online reputation can influence how participants evaluate shared content. Participants described themselves as being more, or less, likely to either read and/or take seriously content shared by their friends and acquaintances based on their perception of the individual who is posting.

> **I've got one friend who constantly likes political stuff. He'll put up an article that says "A bomb went off in Iraq, so many people and kids died, and it hasn't hit the news". And I'll look at that and I'll say "Well, you're right, fair point, but that person is a very political person so I'd rather not read it."**

Male, 30, retail manager, Birkenhead

Despite such concerns, some participants continue to share more 'edgy' content with their close friends. However, they appear to be consciously segmenting their posting behaviour by platform and audience to ensure that this content is restricted to its intended targets. In this respect, the growth in closed networks (such as messaging groups) has created an apparently safe environment for more controversial content – such as photos of nights out, politically incorrect memes or videos, and 'banter' between groups of friends. However, even this can prove to be too much for some participants.

> **It wasn't messages [office group chat on WhatsApp]. It was joking, messing around, sending pictures, sending videos, one person sending a picture that was inappropriate. One thing led to another. I don't need all that. The fact that it saves to your phone. My wife will pick up my phone. If she sees something like that, even though it's banter between us, she might not like that. It's not nice, so I said "I'm getting out of here."**

Male, 30, retail manager, Birkenhead

Social media platforms such as YouTube are perceived by some younger participants, in particular, as offering an opportunity for individuals to build a following and – potentially – a career online. Several of them described themselves subscribing to the channels of successful "YouTubers" - generally those focused on a particular personal interest.

> **There's this guy called AliA… He's like a YouTuber, you get money from doing it. This guy has got millions of people watching him. He's younger than me and he's got an Audi R8, he's got his own house… He's got friends in Australia and Germany. They meet up to play this Pokemon game.**

Male, 27, bar manager, East Barnet

> **One of the YouTubers that I really like – called Wayne Goss… he's really amazing at make-up... He's really successful on YouTube, he's really good and I've been a subscriber for years.**

Female, 24, student, Edinburgh

Some participants even saw this as something to which they might themselves aspire, but they claimed to be reticent about putting themselves 'out there' by posting their own YouTube videos, for fear of being mocked or criticised either by online 'trolls' or even face-to-face by their own peer group.

> **Some of the YouTubers I follow, they get so much abuse. It's your personality you're putting on the line. It's something that you enjoy doing. And people can shoot you down for it. People say "It's OK, they don't know who you are, it's just trolls". But it could affect your confidence. Nobody that I know, from my area, has done anything like that before. You're opening yourself up to abuse… because people aren't very encouraging about that sort of thing.**

Female, 24, student, Edinburgh

> **It's quite hard to start. You get a lot of stick from other people. I know a few people who have tried, but I would never post anything. I haven't got the confidence.**

Female, 16, student, Warwick

Sharing, etiquette and online reputation: case study

Mick defers to the power users …

Mick is an engineer by trade, and likes to tinker about in his spare time with his vintage Mk1 Volkswagen Golf. He is a member of a specialist online forum where he looks for advice and information about specific repairs and modifications.

He describes a kind of hierarchy of authority among users of the forum, and certain power users, who post frequently, in depth and with great authority about the subject. Any advice they give he will usually treat with the utmost respect. However, the influence of these power-users extends beyond their own content. If they are seen to have interacted with another user's content (or in some way implicitly endorsed it), Mick is much more likely to trust that post, even if he is not familiar with the user.

> There are quite a few people on there [forum] who are really, really, really, really, really into their Mk1 Golfs. They go to all the shows, they do this, they do that. Their cars are never used. It's in a garage with a heated floor. They're quite anal about it.
>
> You get to know who they are and they answer questions. They're on it daily. You think if he's answered, and he's given a thread of what to do, or linked to someone else who has shown you how they did, with pictures, it just underlines that what that person is saying is correct by them agreeing with you.

Male, 42, engineer, rural Derbyshire

Section 8

Privacy and security

In 2016, several participants claimed to be more aware than ever of privacy issues, voicing a range of concerns from the relatively trivial (exposing themselves to spam/marketing messages) to the more serious and insidious ('snooping' authorities/employers and personal safety).

> **I know how easy it is to be able to get in contact with someone that you don't know. It happens… and some girls reply. I don't because I know the consequences of it, because we've been educated at school.**

Female, 16, student, Warwick

> **When I applied to try and get some sickness benefit somebody continuously tried to get into my Facebook, so I was alerted. And I think it was them, because when I went out with [policeman] he told me the first place they all go to look up stuff about anybody is Facebook.**

Female, 24, student, Edinburgh

Participants described themselves adopting various tactics in response to these concerns, including using multiple email addresses for different purposes, providing false information, managing privacy settings to limit third-party access to social media profiles, and using messaging apps within private groups in preference to social networks.

> **The only thing that's really annoying is the spam emails, so what I do is have two emails – one for signing up for important things that I want to read, and for things like [signing up for] voucher codes and websites I just use my old e-mail address.**

Female, 16, student, Warwick

> **I don't use my real name. I don't use my real age – except for on the gambling site where I thought they might take pity on me!**

Female, 55, casual worker, London

> **I use my gmail address, but I just miss one of the characters out so I don't get any correspondence from them. It's the same as phone numbers – I just change one digit because I don't want to be getting texts galore from them.**
>
> Male, 42, engineer, rural Derbyshire

> **I'm applying for summer internships and placements and stuff for next summer, and the first thing that people do is look you up on social media, or get someone to look you up. I've made sure that everything I'm on is completely private.**
>
> Female, 24, student, Edinburgh

One of the perceived benefits of WhatsApp was its reputation as the most secure social network. It was particularly disconcerting, therefore, for these users when they saw private media from WhatsApp appear as suggested posts on their Facebook account.

> **There was a big thing about WhatsApp introducing end-to-end encryption earlier this year, so it's seen as the most secure means of messaging people… Now if you go onto Facebook, especially if you're on your phone, if you go to the top it will have all of your shared media from WhatsApp and suggest you might want to post this [on Facebook]. It's a bit scary when you see photos that you've shared with friends, and Facebook is like "do you want to share this with everybody?".**
>
> Male, 20, student, Oxford

> **I remember loads of people were sharing that [information] because that's like so invasive. Really, really invasive.**
>
> Female, 24, student, Edinburgh

As well as some participants experiencing privacy problems, there was a significant increase in reports of security issues among others in our sample in 2016. These included one participant having her business's Facebook page hacked, and then being the victim of an attempted ransomware scam (see case study below); another falling victim to a phishing attack; the daughter of a third participant having her card details stolen; and a fourth participant receiving a visit from the police – and having her PC confiscated – after her IP address was used to share inappropriate content online.

> **I got an e-mail from the HMRC but it's not them, it was like a fake email saying "Put in all your bank details and you're due this much" and I thought it was so coincidental that I phoned the genuine people that day and the very next day I got something through. And I gave them all my bank details…**

Male, 27, bar manager, East Barnet

> **Someone used something on our IP address and uploaded something, and we don't know where it came from… The police came and knocked on the door. I laugh about it, but it's not funny. It's really horrendous. It was a horrendous time.**

Female, 43, stay-at-home mum, Essex

Heightened awareness, and concern about security issues, as a result of these bad experiences has led some participants to increase their levels of online security. But others cited such concerns as a reason to withdraw from certain online activity.

> **I didn't like it before and the one thing I've actually tried to do doesn't work, and it just puts me back even further.**

Male, 27, bar manager, East Barnet

Some participants were even more concerned about privacy and security issues when using their smartphones than when using a PC, and particularly when using wi-fi hotspots. (Such concerns have been relatively widespread among the sample in previous years.) However, as participants use their mobile devices more often and for a broader range of tasks, such fears appear to be diminishing. And there was no direct evidence of participants' privacy or security being compromised this year for reasons specific to the device.

> **I've never done my banking on the mobile, because I always do it at home where I've got the laptop and I've got virus software on it.**

Male, 62, semi-retired, Pinner

> **I don't necessarily think that my attitude has changed. I just think that I care a little less, or I rationalise it as "What are the chances of it happening?". [In the past] I wouldn't do any kind of internet banking, or anything I would consider sensitive, when I was using the mobile network for my internet connection. Now I do that all the time. I've got my banking app on my phone and I use that all the time. Given the choice I would do it at home, but I wouldn't not do it because I'm not at home.**

Male, 27, bar manager, East Barnet

Privacy and security: case study

Denise's Facebook hack

Denise is a young mum who works as a regional fundraising co-ordinator for a charity. She and her husband have recently set up their own online business organising specialist holidays. They have created their own website and have actively promoted their business on social media, employing some of the professional skills Denise has developed in the charity sector.

However, they were dismayed to discover that first their Facebook account, and then other social media profiles, were hacked. This was a source of great stress and concern to them and their fledgling business.

> **Very recently, our Facebook account got hacked and somebody was on there playing poker and posting really, really horrible posts which appeared like they were from us. And then all of a sudden we had a thing to say our VoIP account had been hacked, and then the Twitter one. And I'm like "Whoa, what's going on? How come they're getting access to all of this?"**

Their problems were compounded when they contacted what they believed to be Facebook technical support, but actually turned out to be an online scam.

> **We rang what we thought was Facebook, but Facebook don't actually have a number you can ring – we didn't know this [at the time]. [Husband] gave this person access to our laptop and he's going flick, flick, flick, flick, flick, "You need this, it's £300 per month". What??!!!**

Fortunately, they realised that the service was not genuine, and ended the call before they were victims of any fraud. Having eventually contacted the real Facebook customer service online, they managed to reset their accounts and regain control of their profiles. As a result, Denise is now much more wary about online security, and has employed a number of new strategies to protect herself and her business in future.

> **We've had to change passwords; we've got the secure padlocks on the website to make sure people are confident we have that trust mark. We've looked at things like firewalls, we've looked at the additional security…"**

Female, 39, fundraising manager, Cardiff

Section 9

Consumer problems

With our relatively small sample of 19 participants, it is difficult to identify trends in terms of purchasing decisions, buying processes, customer satisfaction and other consumer issues, as incidents and experiences tend to be isolated and specific to the individual. Nevertheless, there are some common themes, especially regarding the kind of issues which annoy and upset our participants as customers, as well as some interesting and instructive individual case studies.

As far as landline, broadband and TV contracts are concerned, there has been little switching between providers among our sample in the past year. In fact, although several participants claimed to have considered switching providers or de-bundling services, few have done so.

For some, changing involves too much effort or inconvenience. Others claim that they do not have much choice of provider, either because of practical issues (such as service coverage) or because they have personal reservations about alternative providers.

> **Partially convenience [reason for staying with current mix of providers] but partially because they offer good deals for retention. If I went to a company with internet, landline and TV I could probably get a great deal, but we don't have Virgin here and I really don't want to get Sky because of the owners.**

Male, 27, web officer, Cardiff

In some cases, participants have been able to negotiate better deals with their current supplier, and this has made them happy to remain loyal.

> **[Husband] got quite a good deal because the contract was up in the January and he was going to leave. The negotiations are much better when your contract is up!**

Female, 50, housing officer, Coventry

Participants have shown themselves to be more open to changing their mobile contracts, in part driven by the desire to upgrade regularly to new handsets. In particular, this year we heard from several participants who had taken up different kinds of mobile contract bundling offers – either consolidating multiple family handsets on the same contract, or linking their mobile contract to their landline and broadband.

> **BT re-entered the mobile market a little while ago and they were offering some good deals, so I leapt on board.**
>
> Male, 62, semi-retired, Pinner

> **As part of the BT contract, my son had his phone on it, and my wife transferred over yesterday. Her contract finished last week so she has gone over to BT, sim-only and my son is as well. It was a good deal. My wife sorted it all out.**
>
> Male, 42, engineer, rural Derbyshire

As part of this year's interview we specifically asked participants about how they receive bills for their communications services. Most claimed not to pay close attention to their phone (etc.) bills, and in many cases, they claimed not to look at them at all. Many are now on fixed contracts for their communications services (whether landline, mobile, broadband, TV, or more than one of these), so they have an expectation of how much they will be charged each month. Rather than looking at a bill, therefore, they are more likely to check the amount going out of their bank account via direct debit, only looking in more detail if the figure is not what they are expecting.

> **I obviously check my [bank] account so I know how much is going out. It's a standard amount that tends to go out every month. We rarely – or never really – make any landline calls, the mobile stuff is all covered in the package, and we've got unlimited broadband so that sets certain parameters. If there's anything out of the ordinary, we'll know to check.**
>
> Male, 37, web officer, Cardiff

> **They send me a text message to say "This is how much you're paying and the money will be taken out of your account on the first of the month". I don't really pay much attention to that because it's the same amount each month.**
>
> Female, 50, housing officer, Coventry

Only our oldest participant (aged 83) claimed to still pay close attention to her physical landline bill, as she always has (although even she has her mobile contract on a standard monthly direct debit).

> **My [landline] bill still comes through the post. They've asked me about paperless, but I still like to get my bill, I like to scrutinise it. I feel as if I've got more control when I look down my phone bill. £176 – that's quite an amount, isn't it.**
>
> Female, 83, retired, Coventry

There were relatively few complaints from participants about the quality of service and/or customer service they received from suppliers. Most participants were happy with most of the services they paid for. However, there was anecdotal evidence about numerous specific problems across a range of suppliers (although there was no evidence from our sample that any one provider was better or worse in this respect that any other).

Each case is different, but there were certain recurring themes which gave cause for complaint:

- not receiving the (premium) service advertised;

- suppliers changing the terms of the service customers originally signed up to, or increasing prices beyond what is deemed reasonable; and

- being forced to repeat the same conversation with multiple customer service representatives.

Your phone calls used to be free as part of the package. Now the phone calls are only free after six o'clock, which is absolutely pointless because everyone's gone home then, you've got to call in the day.

Female, 55, casual worker, London

They'll do a box set, and they'll have two missing out of it. Or they'll do a set of films – like the *Planet of the Apes* – and you'll get to the fifth one and you have to buy it. Or you'll get to the third one and you'll have to buy the fourth one… That's a little bit sneaky.

Female, 43, stay-at-home mum, Essex

Consumer problems: case study (1)

Daniel's TV installation in instalments

Daniel is a banker living with friends in shared accommodation in London.

Relatively cash-rich but time-poor, the housemates decided to install a top-of-the-range TV service to enjoy in their spare time. However, getting the service installed, and getting it to live up to its premium price tag was not as easy as they had expected.

> **We had a guy come in and I think they had to install a couple of bits… They came in and did all that, and then we had an issue where we were paying for the super-duper package – super broadband, all of the Sky channels, everything in HD, all of the films, all of the sport, and then when we first got the package the sport wasn't activated…**
>
> **Then it was activated, but wasn't in HD.**
>
> **Now half of it is in HD, but Sky Sports isn't.**
>
> **We've had so many phone calls…**
>
> **Every time we call we have this rigmarole of "Let me speak to your boss", and it takes 25 minutes just to get to speak to someone who can actually do something.**

Male, 33, banker, London

Consumer problems: case study (2)

Jenny's mobile phone 'nightmare'

Jenny is a university student living in Edinburgh, and experienced a major problem when she switched mobile phone contracts between two of the largest providers. Her old provider continued to charge her for a service she was no longer receiving, and when Jenny's mum intervened to try and sort the problem out, *she* ended up being charged as well.

After many frustrating phone calls trying to resolve the issue, Jenny ended up having to conduct a detailed examination of her bank statements to make a formal written complaint to the phone provider and, after this was unsatisfactory, to the Ombudsman. Her biggest fear was if it would put a black mark on her credit score. Her online research suggests that others on the internet have experienced the same issue and she is now convinced that the mobile provider in question is 'dodgy'.

> **They were still charging me for it, like 50-odd pounds a month as if i still had the iPhone, but I didn't. So, there was this massive drama and then they started charging me and my mum for the iPhone 6 that I've not got…**
>
> **They were sending me and my mum emails, saying that we were in arrears…**
>
> **Every person that I spoke to said "Yeah, don't worry, we'll sort it". I must have spoken to every single person at [provider]… It was an absolute nightmare.**

Female, 24, student, Edinburgh

At the time of the research, Jenny's dispute with the mobile provider was still ongoing.

Section 10

Learning

The internet continues to be a source of valuable information for the majority of our sample. Google and (particularly) YouTube are often the first point of call when learning how to do almost anything practical, with 'how-to' videos particularly popular. Many participants claim to use these now almost exclusively, at the expense of printed manuals and books.

> **My younger son has one of those smart cars, and I couldn't find the release button for the bonnet, so I Googled it.**

Male, 62, semi-retired, Pinner

> **I would never look at the instructions for a device… I would instantly go to the internet.**

Female, 16, student, Warwick

> **I'm addicted to watching make-up tutorials [on YouTube]. It's literally what I spend all my nights doing when I should be revising. I do it on my phone and on my tablet.**

Female, 24, student, Edinburgh

However, those participants who seek help in how to use digital technology (i.e. about how to do things online), and especially those who are least confident with such technology, are much *less* likely to use online sources for help with technical learning. They tend to seek help from an informed friend or family member.

> **I'm not very technological. I'm not very aware of it, but I do have friends who are. So, if I've got an issue, or if I've got a silly question – what's this, or how do I do this – no one says "You're thick!" or whatever… they'll tell me.**

Male, 30, retail manager, Birkenhead

The differences between information haves and have-nots may be becoming more pronounced across a broad range of learning, as a result of the disparity in participants' online confidence. For example, those who are already confident online users have access to a growing range of learning opportunities via e-learning platforms such as Udemy and Highbrow. They are now using these to learn about academic and cultural subjects as well as technical and practical skills.

It's just a site [Highbrow] that has got lots of short course on all kinds of different things… it's so, so varied. You choose a course and it sends you a daily e-mail that you can read within a few minutes – just a bite-sized chunk. The last one I did was famous photographers in the 20th century.

Male, 33, banker, London

Some participants talked about the emergence of a marked generation gap between the oldest members of society (over 75s) and those in their 60s and early 70s (who tend to have at least some experience of computers in the workplace, and are mostly somewhat more tech-savvy than their immediate elders).

Definitely my age, and a bit younger [have more difficulty] … I know a lady down the road who hasn't even got a computer. But then the younger ones, maybe 60 to 70-year-olds, that's all they do, and they're very good at it.

Female, 80, retired, Bucks

These oldest individuals are most in danger of missing out on the opportunities of the connected world (as described in section 3, above) and of being unable to participate fully in a society in which the default means of interacting with services, organisations and institutions (such as local government) is online.

Section 11

TV, radio and streaming content

Through the 12 years of the *Adults' Media Lives* study we have tracked two long-term trends in participants' viewing of television and, increasingly, their consumption of streaming content. First, a move to ever more time-shifted or on-demand content. And second, ever greater personalisation and fragmentation of the viewing experience. The diversification of the platforms through which TV channels and other video content is available (e.g. the emergence of iPlayer, Netflix, etc.) and the proliferation of devices capable of receiving such content (including hand-held devices) have been major contributors to this shift in viewing behaviour.

In 2016, although there were no dramatic changes, the long-term trend towards greater use of on-demand services across a variety of devices continued. Participants reported marginally more use of catch-up services and box sets at the expense of live or recorded TV, slightly more use of premium streaming services such as Netflix and Amazon Prime, and marginally more viewing on mobile phones and tablets.

We still watch the live news but most of the programmes are the catch-up ones, or [wife] has Netflix for films or packaged bits and pieces.

Male, 62, semi-retired, Pinner

[Husband] hadn't ever watched Cold Feet and I kept saying to him "It's brilliant, you've got to watch it". It was on box set so each night before the new series started we watched Cold Feet and he really enjoyed it.

Female, 50, housing officer, Coventry

I wouldn't worry now, for example on a Saturday night when you've got X Factor and you've got Strictly, and we might be going out. We used to worry "Did we record it?". Now it's on catch-up.

Female, 50, housing officer, Coventry

In fact, for the first time in the history of the study, several participants no longer have a TV set in the home, for various reasons.

> **We still look at a screen, but it's just on the iPad rather than a television. The obvious benefit, first of all, was cost, because we got rid of Sky. Secondly [wife] always thought that the television was rather big, so we were able to replace that with furniture. Three, I suppose it stopped us from sitting on the couch and switching on and "watching the box" all the time. We may sit down still but we look at the screen now and it gives us a bit more flexibility in relation to catch-up programmes.**

Male, 62, semi-retired, Pinner

> **We don't have a TV in the house but I do have Netflix on my iPad so over the summer I was watching quite a lot of things on Netflix, especially because Netflix has quite a lot of independent shows which are produced by Netflix itself, and they tend to be of very high quality… And then I do have things like 4oD and iPlayer on there as well.**

Male, 20, student, Oxford

In parallel with the slight increase in claimed use of subscription services this year, there were more widespread and vociferous concerns about both the absolute cost of subscriptions and the requirement to have multiple different accounts to view all the content you want. (These were first reported in last year's *Adults' Media Lives*.)

> **While Netflix is very good, because there are rival streaming services like Amazon Prime, there are some shows that I really want to watch which are exclusive to a different service and I guess that's how these services draw people in, but it's just kind of infuriating.**

Male, 20, student, Oxford

Participants respond to these concerns in different ways. Some claim to manage their portfolio of subscriptions more actively, swapping in and out of monthly subscriptions for services like Netflix and Now TV and/or switching between them depending on the content currently available.

> **I'm being a bit more strategic, I think about what I pay for and for how long… Now I'll probably be more inclined to stop something and then if there's a big drive to get, say, a new series of *Game of Thrones* or whatever, then I might re-subscribe.**

Male, 37, web officer, Cardiff

Others look for free alternative sources (especially on YouTube).

> **WWell some people… upload it… It's just YouTube… But it's not like you can go to one place and watch the whole thing. You've got to go to different people who have uploaded it and watch it there and there and there.**

Female, 55, casual worker, London

At least four households admitted to having acquired 'chipped' Amazon Fire TV sticks, allowing them free access to sports and films via KODI. Participants' awareness of the legality of this was somewhat vague, with confusion over whether consuming the content itself was illegal, or whether it was the responsibility of the hardware seller, content uploader or provider to adhere to the rules. Some participants tried to justify their use of these devices as an additional service to normal pay-TV (and most do currently use them alongside a legitimate pay-TV subscription), but it seems likely that in the longer term, if the use of KODI on these devices continues to provide an adequate user experience, some users will drop their legitimate subscriptions.

Despite the proliferation of streaming content and the fragmentation of TV viewing, it is important to note that popular mainstream programmes still have broad appeal across much of our sample. In particular, soaps and popular reality shows like *The Great British Bake Off* continue to demonstrate the capacity to unite generations of viewers.

> **Me and my wife we watch the soaps – *Emmerdale* and *Coronation Street* – religiously. If I'm on a night shift I'll say to her "You watch it ahead of me, then I'll watch it when I come home at midnight". I'll watch the soaps so then in the morning, when I wake up we can talk about it then, which is great.**

Male, 30, retail manager, Birkenhead

> **I do like to come downstairs and watch it with my mum because it's more "social" in a way. I don't really like going up to my room and watching it on my own, especially soaps and stuff, if I can watch it with someone else.**

Female, 16, student, Warwick

For many of our participants, the programmes they cite as their favourites (including, in this year's wave: *Poldark*, *Victoria*, *The Great British Bake Off*, *Strictly Come Dancing*, and *Cold Feet*) are still those aired on Public Service Broadcasting (PSB) channels. Although PSB channels are not seen as having a monopoly on high quality programming, most participants claimed that they are still producing strong content.

> I think with the dramas, there are more of them and there are more good ones, and there is a variety of them as well. It's not all about shoot-em-ups, it's not all about period dramas. There is a good mix, I think, across the channels.

Female, 39, fundraising manager, Cardiff

However, a minority claimed that the BBC was not "for people like me", and/or that PSB programming in certain genres (particularly drama and sport) had been superseded by subscription alternatives.

> I've not got a bad opinion of the BBC. It's just that BBC is for 'Independent' readers or people who read 'The Mail'. Whereas ITV, Channel 4 and 5 [viewers] are the 'Sun' readers [like me].

Male, 42, engineer, rural Derbyshire

> A lot of the big money in television now is being generated by the streaming services, especially Netflix. So, it's easier to watch high quality television because they [Netflix] can afford good actors, they can afford good sets, they can afford good writers.

Male, 20, student, Oxford

Despite the increase in viewing on mobile devices, the 'big screen experience' is still important for most of our participants, at least some of the time. Watching on a TV set is still seen by most as an easier, more sociable and more enjoyable viewing experience.

> Sometimes I'll watch it twice because I've watched it on the Chromebook and then I see it come up on the TV and I'll still watch it because it's different – it's high definition and it's large… you can see more.

Female, 55, casual worker, London

Interestingly, several participants spoke about preferring to watch the 'main' channels, in particular, on a TV set. This still constitutes what most would describe as 'watching TV'. Conversely, younger participants are more comfortable watching on-demand services on a mobile device, even though the content they are viewing there is likely to have higher (more cinematic) production values than the programmes they typically watch on a big screen.

> I watch the soaps on the telly, unless I miss it, in which case I'll watch on BBC iPlayer. I feel like that's more tradition than anything. The channels are on the telly, so you watch the channels, whereas anything else I'd just watch it on my phone.

Female, 16, student, Warwick

> I'm actually more likely to watch Netflix and the like on my tablet in my room than I would be down here [in the lounge].

Male, 33, banker, London

Radio continues to play a significant – if sometimes small – role in the media life of the majority of our participants. It is a valued source of news (especially local news), entertainment and company, particularly for the older generation in our sample (over-50s).

> During the day, I usually have Radio Forth on, so it's local news. At night-time, I listen to my bedtime story and then I listen to the world news for a wee while, that sort of thing.

Female, 72, retired, Edinburgh

> Radio – mainly in the car. I don't really listen in the house. It's company, it's good for finding out if any roads are closed or if there have been any accidents… Sometimes I'll drive three hours to a job so it's good because it keeps you alert, it keeps your mind active.

Male, 55, alarm fitter, Lisburn NI

The use of music streaming services such as Spotify and Apple Music has become more widespread among the under-40s in our sample over the past two to three years. However, for most of these users, there continues to be a role for radio in their listening repertoire.

The only time I listen to the radio is when it's convenient, say when I'm in the kitchen – we've usually got the radio on in the kitchen. I've got a Spotify account and I listen to music in the morning on my laptop when I'm getting ready. It's easy, you can search for any song, click on any song.

Female, 16, student, Warwick

Maybe I listen a little bit less, because of the access I've got to all this music [through Apple Music], but I still use the radio because it's easier. You can choose your station, that's one decision, but they make all the other decisions in terms of what music there is to play.

Male, 37, web officer, Cardiff

Funding and regulation

Broadly speaking, participants were aware of the principle of different broadcasters being funded by different mechanisms – including the licence fee, advertising and subscriptions. However, their grasp of the detail of this system was not always strong. In particular, there was some confusion around how the BBC is funded. Some believed that it has more than one source of income. Others could not understand why they had to pay for the licence fee when they believed that they were already paying for the BBC channels through their Sky subscription.

Not completely [aware] – I know it's through advertising and sponsorship, I don't know how else…I think some of it [*BBC* funding] is from sponsorship, but some of it is from the television licence.

Female, 72, retired, Edinburgh

It's something that you've always had to do. You buy a house and you have to pay your mortgage, your gas, your electric, your TV licence. In a way, I begrudge it because technically I can watch BBC through my Sky box, so in that respect I'm paying double.

Male, 42, engineer, rural Derbyshire

Similarly, there was a broad understanding that some form of content regulation applies to TV broadcasting, although most participants struggled to articulate what form this regulation takes, beyond the continued presence of the watershed. Many also described what they perceived as a distinction between what is allowed on mainstream channels, and what may be permissible on niche digital channels like MTV.

How I see it, once it gets past a certain time, anything can go on TV.

Male, 30, retail manager, Birkenhead

> **Not really [aware]. I know there's like the watershed where they're not allowed to do swear words and stuff before 9.00… I know of that, but I don't notice it to be honest… I'd say that those channels [BBC, ITV, etc.] wouldn't show stuff that, like, MTV do. As you go up [the channel list] from 101 they're allowed to be ruder… things like *Ex On The Beach* and *Geordie Shore* that I wouldn't want to watch with my parents.**

Female, 16, student, Warwick

On the whole, participants were comfortable with the standards of the content they had viewed in the past year. Almost none had been upset or offended by anything they had seen on TV. Although some felt that regulation of content on TV may have been relaxed in recent times, others still remarked on the apparent contrast between what is permissible on TV, and the lack of regulation which applies to online content online.

> **I think they have eased back [regulation on TV]. I don't think they could ease back any more, can they? The things I watch on TV you could never have watched [a few years ago]. I've seen real dead bodies, I've seen proper murders… they show everything! I don't think "inappropriate" counts for anything anymore because everything's just out there…. If you don't watch it there you can watch it online, and I think they know that.**

Female, 55, casual worker, London

> **The online world certainly isn't subject to the same kind of rules, regulation, restrictions and expectations as what you would describe as more official broadcasting, more traditional broadcasting. And, equally, it's much more difficult to regulate, I'm sure… Of course, something like the news on BBC or ITV is going to be held to different standards than a fictional programme on Netflix that's there for entertainment – and so they should be – but if you look at things that are on YouTube channels, reported as if they are fact… in terms of what's required of them they're not on the same level.**

Male, 33, banker, London

Indeed, there is some evidence that this broader consumption of unregulated online content may have desensitised our sample to some degree, and, in particular, our younger participants. Notably, the only complaints about TV content came from one of our oldest participants – one of those who is least active online.

> **Not really. I honestly feel like we're in the day and age where you just have to accept that there is going to be a lot of sex and a lot of violence in lots of programmes. I'd say a lot of programmes are focused more on that than anything else. It's not something that's going to offend someone like me because I'm so used to it, I've grown up seeing that on social media and telly.**

Female, 16, student, Warwick

> **They say the watershed is 9.00. There are some things on a lot earlier than that. Things that I don't think children should be exposed to… The sexuality bits I think are getting worse.**

Female, 72, retired, Edinburgh

Nevertheless, most participants expected that content (either broadcast or posted online) from major brands such as Netflix and the TV broadcasters would conform to certain standards of taste and decency, in line with the brand image they have of the relevant organisation. So, for example, they would expect the BBC to exercise the most discretion about what to show, or not to show.

> **The BBC, in a way it's kind of white-collar TV. ITV is a bit more off-the-cuff, then Channel 4 and Channel 5 will show what's not politically correct… This last *Big Brother* – you'd never see anything like that on BBC or ITV.**

Male, 42, engineer, rural Derbyshire

Section 13

Advertising

Most participants claimed to be broadly comfortable with the status quo in terms of TV advertising. They appreciate its importance as a funding mechanism, and accept living with it in its current form. There was no claimed interest (for example) in paying an (additional) subscription to avoid advertising.

> **Is it annoying? Yes, to a degree. If I could get rid of it, would I? Probably. But I think from an economic perspective I just accept it as a necessary evil.**

Male, 33, banker, London

As in previous years, most participants claimed to use ad-avoidance tactics when watching TV - including fast-forwarding through the adverts when watching recorded programmes, or switching their attention to a second screen during the breaks when watching live TV.

> **You know I don't really mind because you watch with half an eye on it, you're always doing something else, and I think everyone's like that, they're either on their phone, they're on their laptop.**

Female, 55, casual worker, London

There were, however, some changes since 2015 in the perception of online advertising. In particular, there were negative attitudes towards what some participants perceived as more aggressive and intrusive online advertising (such as an increase in embedded video ads).

> **Before it was just a banner and you would click and it would go away. Now it's not even a banner, it's a full-on video.**

Female, 55, casual worker, London

Participants also expressed mixed feelings about some forms of native content, and in particular, the way some YouTubers and social media celebrities promote products. Some argued that this was – in their experience – quite blatant, and often promoting trivial products, therefore harmless (even occasionally helpful).

> *Urban List Perth* last week posted something about a healthy day in Perth and it was very obvious the article was sponsored by this one gym that was running a programme. So, I read it but… You take it with a pinch of salt when it's a sponsored article, don't you?

Female, 28, doctor, Perth, Australia (placement)

Others viewed this as more insidious. Two participants, both among the most active consumers of user-generated content in our sample, expressed particular concerns:

> Some of the make-up artists have got five million followers and a lot of them will be younger girls. They are so influential and sometimes they exploit their followers in the sense that they will collaborate with a brand but they won't say it's an ad… Some of the products will be, like £50 for an eye shadow or £60 for a foundation, which is a lot of money.

Female, 24, student, Edinburgh

> Everyone is advertising something, either overtly or not. Even when I'm watching [a YouTube video about] how to re-vamp your synthetic wig, they'll push some sort of spray.

Female, 55, casual worker, London

Annex

Summary profile of wave 12 participants

Icon	Sex	Age	Job	Location	Years in study
	F	16	Student	Warwick	3
	M	18	Student	Rural Yorkshire	4
	M	20	Student	Oxford	3
	F	24	Student	Edinburgh	9
	M	27	Bar manager	East Barnet	11
	F	28	Doctor	Perth, Australia	11
	M	30	Retail manager	Birkenhead	1
	M	33	Banker	London	12
	M	37	Web officer	Cardiff	11
	F	39	Fundraising manager	Cardiff	11
	M	42	Engineer	Rural Derbyshire	12
	F	43	Stay-at-home mum	Rural Essex	11
	F	50	Housing officer	Coventry	12
	M	55	Alarm fitter	Lisburn, NI	9
	F	55	Casual worker	London	11
	M	62	Semi-retired	Pinner	11
	F	72	Retired	Edinburgh	9
	F	80	Retired	Bucks	12
	F	83	Retired	Coventry	12