



# **ADULTS' MEDIA LIVES WAVE 18: 2023**

A report for Ofcom  
March 2023

The Knowledge Agency Ltd  
Quinton House  
2 St Mary's Road  
Leamington Spa  
Warwickshire  
CV31 1DB

[www.knowledgeagency.co.uk](http://www.knowledgeagency.co.uk)

# CONTENTS

[Introduction to the study](#) (Page 3)

[Overview](#) (Page 5)

1. [Media use and screen time](#) (Page 9)
2. [Smart technology](#) (Page 12)
3. [Aftermath of Covid-19](#) (Page 14)
4. [Cost-of-living crisis](#) (Page 17)
5. [Viewing behaviour and attitudes](#) (Page 20)
6. [Listening behaviour and attitudes](#) (Page 26)
7. [Online behaviour and attitudes](#) (Page 29)
8. [Privacy, personal data and security](#) (Page 33)
9. [News](#) (Page 38)

[Annex 1: Participant profiles](#) (Page 41)

[Annex 2: Discussion guide](#) (Page 42)

[Annex 3: Showcards](#) (Page 53)

# INTRODUCTION TO THE STUDY

Since 2005, the Adults' Media Lives study has provided rich contextual insight into media trends by examining how technology and media fit into individual people's lives.

This annual study consists of filmed interviews with a panel of approximately 20 people who represent a broad cross-section of the UK population. We have conducted 18 waves of research to assess the impact of new devices and services on people's everyday lives. This has allowed us to identify new and emerging media literacy issues, as well as tracking how life experiences change people's needs and shift their attitudes to electronic media.

In many cases these changes have been dramatic, not only due to the availability of new devices and services, but also as a result of changes in the lives and domestic circumstances of the individual participants. For instance, we learned that going to university, entering or leaving the world of work, becoming a parent, experiencing the break-up of a family or financial hardship are important drivers of changes in participants' relationship with media. Over the past three years, the global Covid-19 pandemic has also been a catalyst for change, not least in terms of the role that communications technology plays in education and the workplace.

This year, a total of 20 interviews were conducted (17 face-to-face and three online) between 3rd and 28th October 2022 by Mark Ellis, Lauren Dempsey and Tony Harbron of The Knowledge Agency.

The number of participants in the study is relatively small, but these people are chosen carefully to reflect a broad cross-section of the UK population in terms of age, gender, location, ethnicity and social circumstances. Over half of the sample have participated for 15 years or longer. However, as the profile of the sample becomes, by definition, progressively older, we have regularly recruited new participants at the younger end of the age range.

Certain subjects are tracked each year, for example:

- Acquisition of new media hardware (smart TVs, smartphones, smart speakers, wearable technology etc.) and services (such as super-fast broadband, streaming services, etc.).
- Development of media literacy skills, confidence in the use of digital media, and adoption of new online activities.
- The role of the internet in daily life (e.g. education, work, shopping, banking, interacting with government and other institutions).
- Use of mobile devices to consume content.
- Viewing behaviour and other content consumption.
- Sources of news and information.
- Trust in content and media providers across different media platforms.
- Concerns about personal data, privacy and security.

However, the research model is flexible enough to explore specific new areas of interest each year; for example, the impact of the cost-of-living crisis on participants' media behaviour, and attitudes to the media coverage of the death of Her Majesty Queen Elizabeth II. This year, for the first time, we presented participants with a sample email, social media profile and posts (see Annex 3) to understand more about how they assess the trustworthiness of content.

Over the years we have witnessed the real-world impact of some important changes, such as:

- An increased reliance on the internet as many of our participants' everyday activities have moved online: shopping, studying, banking, house-hunting, applying for jobs and engaging with public services. For some this has been extremely empowering, but those who don't have access, or the skills to use the internet effectively, can feel disadvantaged or disenfranchised.
- A shift from linear TV to time-shifted and on-demand viewing, and the increased use of streaming services alongside traditional broadcasting.
- A reduced reliance on – and trust in – mainstream news providers, as news consumption has become more fragmented and personalised, and social media has become a gateway to more diverse sources of information and influence.
- A shift in privacy issues from worries about personal data being hacked, or private details of their personal lives leaking into the public domain, to concerns about how, for example, they suspect that devices might be listening in to their conversations to target personalised advertising at them.

The study complements Ofcom's large-scale quantitative research into media use and attitudes<sup>1</sup>. On occasion, it acts as a bellwether, hinting at changes of attitude or behaviour that are not yet observable in other data sources. However, its findings should be read as illustrative and illuminating, rather than as fully representative of the population.

---

<sup>1</sup> Adults' Media Use and Attitudes report: [https://www.ofcom.org.uk/\\_data/assets/pdf\\_file/0028/255844/adults-media-use-and-attitudes-report-2023.pdf](https://www.ofcom.org.uk/_data/assets/pdf_file/0028/255844/adults-media-use-and-attitudes-report-2023.pdf)

# OVERVIEW

Key insights from Wave 18 include:

## Media use and screen time

As most participants' lives have returned largely to the way they were before the Covid-19 pandemic, they are devoting less time to media. Many have now gone back to their physical workplace (at least part-time) and most felt that they were busier than they had been in the previous two years.

Nevertheless, media technology and services continue to play a prominent role in day-to-day life for almost all participants. If anything, in certain aspects of life – such as education, health and engaging with other government services – electronic devices and services have become even more important.

Screen time is a real concern for many participants (and parents on behalf of their children). Some were just worried in principle that time spent on devices could be more usefully devoted to other activities, but a few described more specific health concerns such as headaches and eyesight problems. About a third of participants described themselves or a member of their close family suffering from mental health issues, and media use was sometimes seen as contributing to or compounding these problems.

## Smart technology

About a third of participants now have at least one smart speaker in their home. These are primarily being used for streaming music and (in some cases) listening to the radio, but a variety of other uses were mentioned.

Adoption of other smart home technology was more sporadic. Health and fitness tracking via smart watches remains popular, and home security is a growth area.

## Aftermath of Covid-19

For most participants, life had returned more or less to normal as the country has opened up again post-pandemic. However, some older participants and those working with the elderly remained much more concerned about the situation and nervous about the winter to come.

Home working has remained a large part of many participants' working regime, but attitudes to home working have become more ambivalent. Concerns were raised about how difficult it is to maintain a healthy work-life balance, and the challenges of building effective social and working relationships.

Online shopping has declined slightly but is still greater than pre-pandemic. The decline in high street retailers means that, for some goods, shopping online is the only option participants feel they now have.

## Cost-of-living crisis

At the time of fieldwork (October 2022) most participants did not feel that they had been significantly affected by the cost-of-living crisis, although almost all had noticed substantial increases in (e.g.) the cost of food, and most were taking pre-emptive measures to reduce energy consumption.

Broadband and mobile phone contracts were largely viewed as essential expenditure, and most suggested they would find other means of making savings (e.g. spending less on food, walking to work) rather than cutting streaming subscriptions or not making essential hardware upgrades.

The majority felt that the crisis had been reported responsibly, but a handful of participants did accuse the media of a degree of scaremongering, especially in relation to reports of potential power cuts over the winter.

## Viewing behaviour and attitudes

Claimed levels of viewing were down compared to last year, and in particular many participants claimed to be binge-watching less – largely as a result of having less free time post-pandemic.

Participants' individual viewing highlights were eclectic and many struggled to remember what they had watched more than a few days or weeks before without prompting.

Although most participants claimed to watch little live TV in general, specific events such as the Commonwealth Games, Women's Euro 2022 and – especially – the death and funeral of Her Majesty Queen Elizabeth II had led to higher levels of live viewing than usual.

Almost all participants had watched coverage of the Queen's funeral. However, attitudes towards the coverage – and especially the amount of airtime devoted to it – varied widely.

Most participants regularly use multiple screens simultaneously – most commonly viewing social media or doing mundane work activities (e.g. responding to emails) in front of the TV. They claimed to make specific viewing choices when they were using a second screen.

Most participants continue to access multiple streaming services; paying for two or three services has become increasingly the norm. There was more apparent price sensitivity to the cost of premium sports and film subscriptions, and evidence of increased interest in accessing this content via alternative means.

## Listening behaviour and attitudes

The word 'radio' has a narrow meaning to participants, and some expressed the view that radio feels rather antiquated compared to other media.

However, claimed radio listening has increased in the past year, especially via smart speakers. Generally, this was listening that would otherwise have taken place via a radio set, and smart speakers seem to have replaced domestic radio sets in many households.

Almost all participants now stream music at least some of the time, either via a dedicated streaming service (Spotify, Apple Music), as a by-product of having an Amazon Prime subscription, or via YouTube.

Nevertheless, music and speech radio stations continue to play a valued role in most listeners' repertoire of services.

## Online behaviour and attitudes

Participants' use of the internet is becoming increasingly personalised, with a growing role for specialist apps and websites in supporting their daily life.

Most participants claimed to be spending less time on social media this year, but video content – especially TikTok – has become a more important part of their social media use.

BeReal was starting to gain traction among younger social media users in the UK at the time of this year's fieldwork, and this was reflected in our interviews. BeReal's claim that it compels users to present a more authentic image of themselves appeared to tap successfully into growing cynicism about the perceived superficiality of much social media content and the role of influencers.

Parents voiced numerous concerns about their children's use of social media. These included the impact of extended exposure to short-form content on attention span, social media images making children feel that they have to look a certain way, the potentially harmful effect of certain influencers and the risks presented by online bullying and harmful content.

## Privacy, personal data and security

Participants understand that websites use their behavioural data for targeting advertising at them, and most are relatively comfortable with this idea. They consider this more or less unavoidable, and part of the trade-off they make to be able to use such services.

The suspicion that devices might be collecting information by listening in to participants' conversations was considered much more insidious, especially by some older participants.

Participants felt more confident than before about identifying scam emails, texts and calls – largely due to familiarity with the format of many of these scams (e.g. fake parcel deliveries), and most were successful in identifying whether or not the example email, social media posts and profile were genuine or fake. However, we also heard evidence of a new wave of more sophisticated and targeted scams which might be a sign of things to come.

## News

The overall level of interest in news remained high. However, about a quarter of the sample claimed that they were avoiding news as far as possible because they find it distressing or depressing.

Participants claimed to access a wide range of domestic and international news sources, either directly via their TV, radio or online, or on a story-by-story basis via links from social media and news aggregators like Apple News.

The BBC continues to be the most common reference point for news content. While a minority remain mistrustful of the BBC's news coverage, some had become more positive in their attitude towards the BBC this year, possibly as a result of the news agenda becoming less contentious and divisive (e.g. less focus on Brexit and the pandemic).

# 1. MEDIA USE AND SCREEN TIME

## 1.1 As life has returned to normal post-pandemic, most participants are devoting less time to media

After two years of periodic lockdown, life has returned to some semblance of normality for most participants. Many have now gone back to the physical workplace (at least part-time) and most felt that they were busier than they had been in the previous two waves of research. As a result, they have less time to devote to consuming media.

*I would say that some things I used to watch before, I don't have the time to watch now.*

Male, 41, NHS Support Worker, Liverpool

*I can't remember the last time I watched a box set. I think... that was because of the nature of how the country was with the lockdown.*

Female, 56, Housing Officer, Coventry

## 1.2 Nevertheless, media technology and services continue to play a prominent role in day-to-day life for almost all participants

Although less time was being devoted to media, it was still considered to be as important as it had been during the pandemic. If anything, in certain aspects of life – such as education, health and engaging with other government services – electronic devices and services have become even more important.

*Instead of having just a traditional white board in the school, they have to sit with their iPads, and instead of printouts... they put all their research work onto there... the teacher will load it all up on an app.*

Female, 45, PA, Woking

*It's called Blackboard. You go on it and it has different options for, like, my courses, activities and stuff. You just click on your courses and it shows all your different modules, exam dates, and then teaching assessments, the work to do in your own time, the lectures.*

Male, 18, Student, Birmingham

*I've been looking at maybe stopping my gym membership recently and finding ways of engaging with things like Zwift, to motivate me to do a bit more sport around the house.*

Male, 43, Web Officer, Cardiff

*I broke my arm. After a while I had to start physiotherapy. I only attended the hospital once out of 15 occasions. All the other 14 occasions were dealt with on Zoom.*

Male, 68, Semi-retired, Pinner

### 1.3 Screen time is a real concern for many participants (and for some parents on behalf of their children)

Notwithstanding comments (above) about less time being devoted to media this year, many participants were concerned about the amount of time they (or their children) spend looking at a screen. This is not a new concern, but it was articulated more widely than before.

*It's terrible. When it comes up – every Monday, I think it is – you get the [screen time] notification...  
And I'm like "This feels like a hate crime. Stop... I don't want to see it!"*

Female, 29, Solicitor, Edinburgh

*I've tried to restrict how much time [daughter] is on her mobile, but she's worked out how to override it. [Husband] bought a mobile phone cage from Amazon...  
"Right. Enough. We're all locking our phones in there at 8 o'clock!"*

Female, 45, Fundraising Manager, Cardiff

*I don't feel in control of it. I feel the way that society has evolved now you either do a manual labour job – which I don't fancy – or you have to stare at a screen all day.  
And the nature of social media, TV... a lot of socialising in life involves a screen.*

Male, 23, Odds Trader, Leeds

Some were just worried in principle that time spent on devices could be more usefully devoted to other activities, but a few described more specific health concerns about headaches or the impact of screen time on their eyesight or attention span.

*I could be doing something better with my time.*

Female, 22, Sports Coach, Warwick

*I was getting terrific headaches again. And I haven't had migraines for years.*

Female, 45, Fundraising Manager, Cardiff

*There are definitely elements of it where I can feel my attention span being negatively impacted in some way.*

Male, 26, Tutor, London

This is perhaps one facet of a broader backdrop of mental health issues affecting participants' lives. Around a third had either experienced such issues themselves or were affected by problems experienced by a close family member.

The root causes of such issues were usually circumstantial (e.g. the pandemic, bereavement) but media-related factors were frequently cited as exacerbating the problem, and people's mental health was sometimes a prism through which other areas of discussion (e.g. attitudes to news and social media) were viewed.

*Mental health-wise, my husband was massively affected by Covid and... since Covid things have got worse... He just didn't recognise the family around him... We've talked about splitting for quite a while because he's just not helping at all. All he's doing is being on his phone. It's like an addiction.*

Female, 45, PA, Woking

*Nobody [on Facebook] was saying, "Hi, how are you today?" It was all "Look what I'm doing, skiing up the Alps"... [Daughter] said "I've come off it Mum", and I said "Good for you. If it's getting you down, don't listen to it."*

Female, 78, Retired, Edinburgh

However, not all screen time was considered equally. Distinctions were made between necessary or unavoidable screen time (e.g. work emails, Zoom meetings) and discretionary activities such as social media use and viewing streamed content. Some also made a distinction between time spent on hand-held devices and watching TV, which they did not consider to be 'screen time' in the same way.

*95% of my lessons are online, I have one face-to-face a week, so all my work is online. Any reading that I do will contribute to screen time. It sounds really stupid to say that TV doesn't feel like screen time, but it kind of doesn't now... I feel like if you watch something as a house on the TV, it does feel a lot more wholesome than just being holed up in your room watching Netflix.*

Male, 26, Tutor, London

## 2. SMART TECHNOLOGY

### 2.1 Around a third of participants now have at least one smart speaker in their home

Seven of the 20 participants claimed to own at least one smart speaker (either Google Nest or Amazon Echo); several had multiple (the most was six in one household).

These are primarily being used for streaming music and (in some cases) listening to the radio, but a variety of other uses were mentioned including setting alarms, controlling lights, Googling answers to questions, and communicating with children in their bedrooms.

*I've got an Alexa and I use it quite a lot actually. It's in the kitchen so I usually listen to BBC Scotland when I'm working.*

Female, 29, Solicitor, Edinburgh

*I'll say "Alexa, play Blue is the Colour by Chelsea, 1970." Then you hear the kids... "What sort of music is that?"*

Male, 61, Alarm Fitter, Lisburn, NI

*At home all my lights were Alexa lights, so I could tell Alexa to turn the lights off, to turn them on, to dim them, to change colour or whatever.*

Male, 18, Student, Birmingham

*Sometimes if I want to feed the dog something and I don't know if she can have it, I'll be like "Hey Google, can the dog eat banana?"*

Female, 22, Nurse, Belfast

*I'll announce, you know, "Food's ready!" or something like that, which then tends to reach the corners of the house, because sometimes shouting doesn't work.*

Male, 43, Web Officer, Cardiff

Among those who do not currently own smart speakers, a few cited privacy concerns as a reason not to get one (see Section 8.2, below), but most have just not (yet) identified a pressing need to have one.

## 2.2 Adoption of other smart home technology was more sporadic, but home security is a growth area

About a third of participants have smart watches but the adoption of these seems to have plateaued. As previously, these are primarily used for health tracking.

However, the use of technology for home security was an area of growth this year. Two participants mentioned having Ring doorbells, and several others had installed some other kind of connected security camera on their property.

*Where we live – being at the end of a gravel drive – we've always thought that we're pretty secure, but I thought that putting a camera on the garage and pointing down the drive would be a way of monitoring the situation.*

Male, 78, Retired, Warwick

*We could see what was happening, who was coming and going.  
I could see [daughter] ordering pizzas at 11.00 at night.*

Female, 56, Housing Officer, Coventry

*My daughter came out of the car and did a dance in front of it, tongue out and, you know, throwing some abuse my way. But she didn't realise that I could capture that video and send it to my wife.*

Male, 43, Web Officer, Cardiff

## 3. AFTERMATH OF COVID-19

### 3.1 For most participants, life has returned more or less to normal

Responses to the question "Is life back to normal?" varied considerably across the sample. For many the answer is yes, or at least life has settled into a new kind of normal.

However, a few participants (particularly older participants and those working with the elderly) remained much more concerned about the current situation and nervous about the winter to come (the fieldwork took place in October).

*I play bridge either once or twice a week. We did go back to having face-to-face bridge a couple of months ago but we've gone back to playing online. That's basically because of the rise in Covid infections.*

Male, 78, Retired, Warwick

*We are nowhere near back to how we were, or at least the pandemic has brought a different set of problems. Where I work [with old people], because of lockdown their bodies have suffered as well as their mental state.*

Female, 56, Housing Officer, Coventry

### 3.2 Home working is still a large part of many participants' working regime

The pandemic seems to have had a long-term transformational impact on many participants' work life, particularly those who are primarily office-based. Most of the office workers in the sample are now back in the office some of the time, but nearly all have embraced some form of hybrid working, with home working still forming a significant proportion of their working week.

*I think working from home proved to be very beneficial during that period and, whilst I'm no great expert, I can see that there's a large percentage of people who don't go back to the office, or at least not full-time. That has changed.*

Male, 68, Semi-retired, Pinner

### 3.3 Attitudes to home working have become more ambivalent

Attitudes to remote working have become more ambivalent over time (we saw evidence of this last year and attitudes appear to have hardened further in the period since). Time-efficiency and convenience continue to be seen as important benefits, but concerns were raised about how difficult it is to maintain a healthy work-life balance when working from home, and how difficult it is to build effective social and working relationships with colleagues they are not meeting in person.

*There are benefits... saving time spent travelling, and of course cost. Once you've done it once and you think "That's not too bad" – and you're getting something from it – that gives you confidence.*

Male, 68, Semi-retired, Pinner

*Working from home was a bit boring because going into the office you see people, you chat with people, you have a laugh. Whereas working at home is like the same thing every day.*

Male, 41, NHS Support Worker, Liverpool

### 3.4 Online shopping has declined slightly but is still greater than pre-pandemic

Participants claimed to be shopping online less than they were during the pandemic – especially for groceries, which many participants still prefer to buy in person when possible. For other purchases (clothes, books, etc.) there was less of a change. Online retailers offer greater choice and convenience, and better value.

*Since the baby arrived 11 weeks ago there hasn't been a day that Amazon Prime haven't called at this house. It has been a godsend... As you realise you need things, you know, I'll buy it at 3.00 in the morning and it will often be here the next day.*

Female, 34, Doctor, London

*The price I see in the shop... If I go on Amazon, I'll see that it's cheaper.*

Male, 41, NHS Support Worker, Liverpool

*I wanted to buy some padded envelopes and went to [shop]. And compared with what's available online, [shop] is about three or four times more expensive.*

Male, 78, Retired, Warwick

Some remarked that the decline in the high street retailers has meant that shopping online is really the only option they now have for certain goods.

*The reason why we're doing more clothes shopping is because there are no nice shops round here... It arrives the next day or in two days. If you don't like it, it's very easy to pop it back in the envelope, take it to the lovely postmaster who does all the scanning for you, and you can send it back.*

Female, 56, Housing Officer, Coventry

*The shops uptown are all closing down, so if there's something I want,  
that's when I would use [online shopping] more.*

Female, 78, Retired, Edinburgh

For one participant in particular, using the internet to hunt out the best possible deals has become essential as economic conditions have made life increasingly difficult. She had been using the *Too Good To Go* app to access yellow-label food items at discount prices.

*You download this website and it will say to you "Right there's two magic bags at [shop]". I tried it.  
You pay £3.30 for a magic bag at [shop] and it should have £10 worth of stuff in it.  
Too Good to Go – that's what it's called. It's all yellow ticket stuff.  
I went over there, picked up my two bags of stuff and it's a multitude of everything.*

Female, 49, Carer, Chelmsford

## 4. COST-OF-LIVING CRISIS

### 4.1 Most participants had not been significantly affected by the cost-of-living crisis

At the time of the fieldwork (early October onwards, just after the introduction of higher energy tariffs) the majority of participants claimed that they had not personally been affected in any serious way by the cost-of-living crisis, although almost all had noticed significant increases in (e.g.) the cost of food.

*I've noticed it, but it has not started affecting me.*

Male, 41, NHS Support Worker, Liverpool

However, two participants – one a retired widow and the other a single mother – claimed to be facing more serious financial issues.

*The shopping has gone up a hell of a lot. Where I might have been spending £80, it's now about £100. If we hadn't got [son's] money coming in – his disability stuff – we would be screwed.*

Female, 49, Carer, Chelmsford

*With my husband's pension I usually pay all my bills, but now it's not enough to pay my bills.*

Female, 78, Retired, Edinburgh

### 4.2 Most were taking pre-emptive measures to reduce energy consumption

Nevertheless, there was widespread concern (and uncertainty) about the potential impact of rapidly rising energy prices both on participants themselves and others. Most had started taking measures to save energy such as being more vigilant about switching lights off or waiting until later in the year before turning the central heating on.

*I can definitely notice it. I'm trying to hold back from putting the PlayStation on, or turning too many lights on in the evening... things like that. It only happened on 1st October, so it has only been a couple of weeks so far, and I'm working so it's okay at the moment.*

Male, 33, Labourer, Clacton

*Obviously, the heating is not coming on as much. I've been cracking the whip. The wife wanted it on ages ago. I'm like "No, put another jumper on... Get a blanket!"*

Male, 48, Engineer, Rural Derbyshire

More broadly, participants had been considering other ways of cutting back on their spending, including delaying non-urgent upgrades to phones and other devices, and making more modest plans for Christmas 2022.

*The first thing to go would probably be any unnecessary upgrades, you know?  
I'll hop a year for upgrades. Now, it might be three years, maybe a bit more.*

Male, 43, Web Officer, Cardiff

*I won't sit down and do what I did over the last two years, [online shopping] all nice and cozy  
with the fire on and a nice little glass of red wine... "Ooh, they'd like that. It's only £15."  
That is not happening this year.*

Female, 56, Housing Officer, Coventry

### 4.3 Home broadband, mobile phones and streaming subscriptions are considered 'must keep' even during a cost-of-living crisis

When asked which services they would be prepared to sacrifice first in the event of financial difficulties, participants struggled to find an acceptable answer. Broadband and mobile phone contracts were largely viewed as essential, and most suggested they would prefer to find other means of making savings (e.g. spending less on food, walking to work) than cut streaming subscriptions or not make essential hardware upgrades. That said, there were relatively few changes this year in terms of the adoption of new technology, upgrading existing tech or switching suppliers.

*Prime? I think that would probably be the last thing to go because my wife uses Amazon  
that much... Sky Sports? We'd possibly get rid of the kids before I got rid of Sky Sports.*

Male, 48, Engineer, Rural Derbyshire

*I need an iPad. I need a laptop. I know these costs are going up,  
but when you need something, you just need it.*

Female, 45, PA, Woking

### 4.4 The majority felt that the cost-of-living crisis had been reported responsibly by the media

Whereas last year there had been criticism of some of the media coverage of the pandemic, and particularly the petrol shortages of summer 2021, the majority felt that media coverage of the cost-of-living crisis had been responsible and proportionate. They viewed it as a serious matter affecting almost everyone and therefore merited the kind of coverage it had received.

*When you see the statistics and what they're saying, everyone's bills are going to increase.  
You know that's going to have a massive impact and that's going to affect everyone.*

Female, 29, Solicitor, Edinburgh

*I think with the petrol crisis the media was a lot to blame for that; that was nuts. But this does feel  
very real, and it's very real stories that they're telling on the news. I think they had a story saying  
that, as well as food banks, we're going to have heat banks this winter so families can go to a local  
library or something to keep warm. That's not the media being sensationalist, that's shocking.*

Female, 34, Doctor, London

Nevertheless, a handful of participants did accuse the media of a degree of scaremongering, especially in relation to reports of potential power cuts over the winter.

*I think it has been extremely confusing. It has been worrying. I can remember being at work and one member of staff coming in in floods of tears because, she said "My electric bill is going to be nearly £10,000." "Who told you that?" "It was on the news".. I do believe there has been scaremongering as well. They're talking about power cuts between certain hours of the day... your neighbours might have electricity but you won't.. that is enough to frighten the generation below me because they've never experienced anything like this.*

Female, 56, Housing Officer, Coventry

#### **4.4 Only participants with an existing interest in money-saving tips had been specifically seeking out information**

When asked whether or not they had been seeking out information about personal finance or money-saving tips more than usual because of the cost-of-living crisis, participants mostly claimed that this was not the case. Some have a long-standing interest in such content and were highly engaged, but none had started looking for this information purely as a result of the crisis.

*I like some of the websites and that's where I've been looking at ways to save money. So I've been clicking on a lot of those as well. Things like "Top 5 Ways to Stop Your Energy Going Mad".*

Female, 45, PA, Woking

In terms of specific sources of information, some participants were already close followers of Martin Lewis, and he has an excellent reputation among those who are aware of him. For these participants he is highly influential, being seen as someone who is an established expert in his field, highly visible across media, a good communicator and honest (not sugar-coating the truth).

*It's all to do with trust, whether we like it or not. In my view, Martin Lewis is more trustworthy than any government or any government minister. So if Martin Lewis says something... to me that's virtual gospel.*

Male, 68, Semi-retired, Pinner

*He answers specific questions really clearly. I mean, he's just brilliant and really trustworthy, I think.*

Female, 34, Doctor, London

*Everything he says he puts in layman's terms so that normal people can understand it, rather than a politician waffling on forever, and you're not really understanding what they're saying.*

Male, 48, Engineer, Rural Derbyshire

## 5. VIEWING BEHAVIOUR AND ATTITUDES

### 5.1 Claimed levels of viewing were down compared to last year

Although patterns of viewing varied widely across the sample, overall levels of claimed viewing were down slightly compared to the previous two waves, and in particular many participants claimed to be binge-watching less – largely as a result of having less free time post-pandemic.

It now seems to be more difficult for households to find time to sit down together to watch. Busy lives and, in some cases, living apart because of work commitments mean that participants either can't watch with their partner or have to find ingenious solutions for watching together.

*Trying to find time for us both to watch something together is pretty nonexistent.*

Male, 23, Odds Trader, Leeds

*It's hard to find time to do it. Probably about once a week we'll watch it together on FaceTime, which is a bit weird, but I guess it's like we're watching it together at home.*

*"Three, two, one, play." Yeah, it's just literally like that.*

*And then we'll try and hear through the phone whether we're at the same point.*

Female, 22, Sports Coach, Warwick

### 5.2 Participants struggle to remember what they have watched

Participants' individual viewing highlights were eclectic and, as we found last year, many struggled to remember what they had watched more than a few days or weeks before without prompting.

*I was literally watching it yesterday. Give me a second. It was on Netflix. It's called... it's like a serial killer... It's like a documentary about him.*

Male, 18, Student, Birmingham

When prompted with a list of popular programmes from 2022 (see Annex 3, Showcard 2), the most widely recalled were a mix of those from PSB channels (e.g. *I'm a Celebrity Get Me Out of Here*, *Line of Duty*, *Gogglebox*) and streaming service exclusives (*Stranger Things*, *After Life*), but participants were often not sure where they had seen a particular programme.

*I can never remember. If it's on a platform like a streaming service – so like Netflix or Prime Video – I'll find out. If it's on like a TV channel there's no chance I will be able to differentiate between them. Gogglebox? I have no idea. Top Gear? No idea.*

Male, 23, Odds Trader, Leeds

## 5.3 Major events in 2022 led to an increase in claimed levels of live viewing

Although most participants claimed (as in previous waves) to watch little live TV in general, specific events such as the Commonwealth Games, Women's Euro 2022 football and – especially – the death and funeral of Her Majesty Queen Elizabeth II (see Section 5.4) had led to higher levels of live viewing than usual.

*The only thing I watch live is sport I'd say. And then after that I'd say pretty much everything is streamed. The only other thing we might watch live on a Friday is Gogglebox.*

Female, 22, Sports Coach, Warwick

*The kids don't even understand live TV any more. It's really bizarre and I always say to them. "We used to have four channels when we were younger. We were happy with that. You know, you've got too much choice all the time."*

Female, 45, PA, Woking

*This year, without doubt – and obviously because of the situation with Her Majesty passing away – I have never watched so much live television.*

Female, 56, Housing Officer, Coventry

*Yeah, we loved the Commonwealth Games. They were on constantly here – really, really enjoyed them.*

Female, 34, Doctor, London

Many participants remarked positively about the change in public attitudes to women's football over the summer, in part facilitated by the extensive coverage of Women's Euro 2022 on the BBC, and participants almost unanimously agreed that it is important for the BBC (or other PSB channels) to cover such events (men's and women's).

*I watched the women's football... The standard is getting better. The coverage is getting better, the crowds are getting better. It needs to be on mainstream TV.*

Male, 48, Engineer, Rural Derbyshire

*I thought that the exposure that got was really important, and it was really positive. I think that was something unprecedented because... there hasn't been that much excitement about women's football ever, really.*

Female, 29, Solicitor, Edinburgh

*It was really amazing to watch that. And the traction that they got – almost as much as the men's team would have got – was really fantastic to see.*

Female, 34, Doctor, London

*Football has always been a sport anyone can play and get involved with. So I think the fact that England is on ITV or Channel 4 all the time is really good.*

Male, 23, Odds Trader, Leeds

## 5.4 Attitudes to coverage of the death and funeral of Her Majesty Queen Elizabeth II varied widely

Almost all participants had watched coverage of the Queen's funeral – mostly live, and usually on the BBC – with many remarking that they felt it was important to witness this significant moment in history.

*Usually I probably wouldn't switch on the live television for any sort of event; I'd watch on catch up. But I think that was just an important moment of history that I kind of wanted to be part of.*

Female, 22, Sports Coach, Warwick

*I watched all the services. I didn't want to see it on catch up... I felt as though I needed to see it live because it was a point of history... One of the kids said "Oh, Mum's being very patriotic. She's not watched it on Sky. She's watched it on the BBC." I felt as though it was the right thing to do.*

Female, 56, Housing Officer, Coventry

*I was up at 9.15 in my dressing gown. I didn't move till 1.30 when the coffin got put into the hearse.*

Male, 48, Engineer, Rural Derbyshire

However, attitudes towards the coverage – and especially the amount of airtime devoted to it – varied widely, largely linked to participants' broader attitudes to the monarchy. Some participants very much enjoyed the depth of coverage. Others felt frustrated by the wall-to-wall programming across all channels, especially during the period between the Queen's death and the funeral.

*It was very good, but it was on every programme on every station and you did get a wee bit fed up with it all, you know?*

Female, 78, Retired, Edinburgh

*Some of it was just standing around at the Palace... they were there for hours. Is there nothing else on? There's only so much you can take of looking at Buckingham Palace and bringing in these people I've never heard of to talk about it.*

Male, 61, Alarm Fitter, Lisburn, NI

*I caught bits of it. It was hard not to because it was on every single channel. The question is, why?*

Female, 61, Unemployed, London

The tone of the coverage was largely considered to have been appropriately respectful, as participants either shared the same attitudes themselves or at least recognised that national broadcasters would be expected to show due deference. However, a few participants were more critical and expressed disappointment that any potential debate about the future role of the monarchy appeared to have been shut down.

*I'm not anti-Royal Family, but it was ten days of constant on BBC. It was a lot, and there were a lot of talking heads coming up with the same platitudes.*

Female, 34, Doctor, London

*The whole process – for me – was an assumption that certain things were going to happen, and the media were just going along with that, as opposed to scrutinising as they should have done. There was a lot of fawning... The conversation that I was having with my neighbour, or my friends... wasn't represented on the media at all.*

Male, 43, Web Officer, Cardiff

## 5.5 Most participants regularly use multiple screens simultaneously

The majority of participants talked about multi-screen activity as part of their routine viewing behaviour, most commonly viewing social media or doing mundane work activities (e.g. responding to emails) in front of the TV. The increased level of home working has led to multi-tasking becoming more common.

*When we've got the TV on I'm always being told off for being on my phone, because that's my time. I'm sitting down, finally, I can look at the social media side of things, or I'll catch up with a few emails. But the majority of the time is just, you know, flicking through photos and seeing what's going on on Instagram and Facebook.*

Female, 45, PA, Woking

*Sometimes when the telly's not so good I just turn the sound down and I'll go on [laptop] and have a game of Solitaire or something.*

Female, 78, Retired, Edinburgh

*I'll read on my Kindle app. Yeah. So I'm multitasking or I might be doing work out of hours when I shouldn't be. [Husband] is watching something and I've got the laptop on and he's like, "What did you think of that?" And I'm like, "Great, love", when they just got shot!*

Female, 45, Fundraising Manager, Cardiff

*If I'm writing a paper or need to do something focused, I will do it in my office upstairs. However, if I'm going through a process that is a bit less arduous in terms of brain power, or maybe something I'm really familiar with, then I can go through it and maybe catch a few events on the TV.*

Male, 43, Web Officer, Cardiff

Most commonly, participants claimed to make specific viewing choices when they were on a second screen. Generally, they will choose to view entertainment programmes on mainstream TV (or, in the case of some of the men, sports events in which they have only a modest interest) rather than more engaging dramas and box sets which they believe require their full attention.

*If I'm watching something on TV I'll try and just watch the thing on TV. I try not to scroll on my phone. But it's obviously tempting when it's there. But it depends what I'm watching... if I'm watching something that's like background, something that I'm not that interested in, I'll just happily scroll on my phone at the same time.*

Female, 29, Solicitor, Edinburgh

*I've got my phone on charge next to me on my sofa, and then I'll have Twitch on, which I'm not too interested in. So when it's half time or there is a foul or a throw in I'll go and look at Twitch. I've always generally got two things on the go at the moment.*

Male, 33, Labourer, Clacton

*One that I didn't have to follow, one without a storyline. So... more I guess reality TV like Gogglebox – that would be background television. Whereas the ones that you have to follow... I got really into that Jeffrey Dahmer one on Netflix. I think I watched in two days... That wasn't something where I was on my phone while I was watching.*

Female, 22, Sports Coach, Warwick

## 5.6 Participants continue to access multiple streaming services

Despite the claimed reduction in viewing box sets this year, streaming services still play an important part of the viewing repertoire of most of our sample. The majority continue to have access to multiple streaming services; Netflix remains the most widely used service (by three quarters of our participants), followed by Amazon Prime Video (by just over half).

This year the user base for Disney+ has increased substantially. About a third of participants claimed to use it, but seemingly without unsubscribing from other platforms; all also have access to Netflix and Amazon Prime Video.

*I don't watch EastEnders or Coronation Street, anything like that. But I do have Netflix, Disney+, Amazon Prime, Spotify.*

Male, 18, Student, Birmingham

Sharing accounts between friends and family members – either at separate addresses or across multiple devices within the same household – was still common (especially where participants wanted access to multiple services).

*The Prime Video is my old housemate's, so I hope he doesn't watch this interview. And then the Netflix is mine. So I pay for that. Mum uses that as well. [Partner] uses that and what other things... Disney+ is [partner's] parents'.*

Male, 23, Odds Trader, Leeds

*She was the best lodger ever. She moved in, she put her Netflix in that TV and another TV I let her have in her room. I literally binge watched Netflix because I knew it wasn't going to be there forever. I watched everything.*

Female, 61, Unemployed, London

*My brother was watching it. My dad was watching it. And I couldn't watch it. So I had to go downstairs. "Dad, are you going to bed soon?"*

Female, 22, Sports Coach, Warwick

Paying for two or three services appears to have become increasingly accepted as normal, even though participants sometimes claim that they barely use some of these services or are doubling up with housemates so that there are multiple subscriptions to the same service in the same household.

*One of my housemates has a Disney subscription. I think two of us have a Netflix subscription and then stupidly we all have Prime.*

Male, 26, Tutor, London

*It's only like £8 or £9 or whatever. But if you've got four or five of them, you know, that's a lot to keep subscribing to. I mean, I keep doing it.*

Female, 29, Solicitor, Edinburgh

## 5.7 Participants are more price-sensitive to premium sports and film subscriptions, and there is evidence of increased interest in accessing this content through unofficial sources

Whereas subscriptions to streaming services such as Netflix and Disney+ are often being paid without too much thought, there does appear to be more sensitivity to the cost of premium TV channels (sport and films), perhaps exacerbated by concerns about the cost-of-living crisis. For the first time in several years participants expressed an interest in getting access to these channels via alternative sources. Two already claimed to subscribe to some kind of unofficial online streaming service providing these channels via a box or dongle<sup>2</sup>, and another was looking into doing so.

*The reason why I stopped Sky Sports is because I have... a small box... I just got it. I'm paying less and it's showing me all the sports.*

*A neighbour down the road said to me – because I was asking if we could watch football with him one day – "Just buy the [dongle], you've got all the football you can get on there" rather than buying a Sky package for however much that would be.*

*It can't be legit... I just have it. But I don't know anything... I was just offered this for £55 a year instead of £100 a month. And to be delayed two minutes behind live TV... it's not a problem to me.*

---

<sup>2</sup> Purchasing, viewing and/or downloading copyright works via from third parties who do not have the agreement of the rights holder to distribute such copyright works is likely to represent an infringement of the Copyright, Designs and Patents Act 1988. It may also represent an infringement of other intellectual property rights such as those relating to Trademarks. See guidance from the Intellectual Property Office (IPO) for further context: IPO guidance dated 20 November 2017 on illicit streaming devices at <https://www.gov.uk/government/publications/illicit-streaming-devices/illicit-streaming-devices> and IPO guidance 19 December 2022 at <https://www.gov.uk/government/publications/meta-counterfeit-and-piracy-campaign/the-effect-of-piracy>. This recent guidance explains that there can be potential harms associated with accessing premium content via unauthorised means on such devices.

## 6. LISTENING BEHAVIOUR AND ATTITUDES

### 6.1 The word 'radio' has a narrow meaning for participants

Unlike 'TV' which participants often use generically to describe linear TV, catch-up and streaming services, the word 'radio' (when prompted) had a narrow meaning for our participants. It was strongly associated with the device itself, and all thought of radio as a linear, live service.

They appeared to consider radio separately from other forms of audio content such as podcasts and streaming music services (even those who were aware that some radio programmes also exist as podcasts), and some expressed the view that radio feels rather antiquated compared to other media.

*I think two things come to mind. Number one, the radio box.  
And then [secondly], I think 'No, that's too old'.*

Male, 18, Student, Birmingham

*I feel it's quite antiquated to have a radio. It makes me think of my grandmother who listens to the radio. I think she's the only person I know who puts the radio on.*

Female, 34, Doctor, London

*"Radio" sounds so kind of old fashioned now. I mean, I can remember growing up and the word would be "the wireless". "Put the wireless on."*

Female, 56, Housing Officer, Coventry

### 6.2 However, claimed radio listening has increased in the past year, especially via smart speakers

As participants have spent more time travelling and commuting to work since the end of lockdowns, levels of claimed radio listening have risen slightly compared to the previous two waves.

Moreover, about a quarter of participants described themselves listening to radio stations at home via a smart speaker. This was generally listening that would otherwise have taken place via a radio set, and smart speakers seem to have replaced domestic radio sets in many cases (less than a quarter of participants now claim to have a radio set in their home). Although smart speakers had encouraged some experimentation, the choice of station listened to via the smart speaker was, more often than not, the same as before.

*We don't have the radio set up any more. I listen to talk radio.  
It tends to be Radio 4 or 5 that I listen to on the Echoes.*

Male, 43, Web Officer, Cardiff

*“Play me a station that plays this type of music” and it’ll go, “Well, this is Smooth FM. It’s on so and so and so and so. Would you like to try this?” Okay then. I know Smooth FM is one of the standard ones, but it’s just not one that I would listen to.*

Female, 45, Fundraising Manager, Cardiff

### 6.3 Almost all participants now consume music online

Almost all participants now consume music online at least some of the time, either via a dedicated streaming service (Spotify, Apple Music), as a by-product of having an Amazon Prime subscription, or via YouTube.

*I don’t do radio. I just go on YouTube and put my songs on there. So if I’m cooking out there I’ll just find Queen or Michael C. Hall – he’s one of my favourites at the moment.*

Female, 49, Carer, Chelmsford

*I don’t know how it works [Amazon Prime Music]. Honestly, it’s brilliant. You can ask for a record and it will get it, just like that. I’ve asked it for obscure records and it’s there, like that. It’s just weird how quickly it can answer you.*

Female, 78, Retired, Edinburgh

*I’ve got all my [Spotify] playlists made up... for whatever mood I’m in. So if I’m going out I’ve got a getting ready playlist. I’m doing a surprise birthday party for my Mum in December and the party is 90s themed so I’ve got a 90s playlist with all the songs that I’ve been getting together for the party.*

Female, 22, Nurse, Belfast

### 6.4 Music and speech radio stations continue to play a valued role in listeners’ repertoire of services

Despite them having access to streaming music services, music radio stations continue to play a role in participants’ listening repertoire. Two of the younger female participants in particular remarked on how they value radio stations like BBC Radio 1 for introducing them to music that they otherwise wouldn’t hear. They get bored listening to the same playlists over and over again, and dealing with all the available choice to search out variety can sometimes feel like too much effort. They also praised the entertaining chat between songs.

*I was getting a little bit bored of just listening to the same songs, so I thought “You know? I’m just going to pop the radio on”.*

Female, 22, Sports Coach, Warwick

*I find if I’m listening to Spotify, I’m looking and looking and looking for something that I want to listen to, whereas with the radio it just sort of mixes it up for you.*

Female, 22, Nurse, Belfast

Speech radio (and relevant speech content on music stations) was also valued, especially by participants based in the nations.

*Now I enjoy listening to BBC Scotland and Radio 4. To me radio used to be music.  
Now it's chatty, or topical issues. My way of using it has shifted. My purpose for it is different...  
I find it really informative, more interesting, more intellectually stimulating.*

Female, 29, Solicitor, Edinburgh

*I put the radio on for local news, on Radio Forth, and the bedtime stories on Radio 4.*

Female, 78, Retired, Edinburgh

*I guess it's the conversational pieces. In the morning it's the banter. On a Saturday Rylan just cracks me up. He helped me through sorting out the attic. The dynamic with Lisa Tarbuck is brilliant. You don't get that with music... it just goes track>track>track>track.*

Female, 45, Fundraising Manager, Cardiff

# 7. ONLINE BEHAVIOUR AND ATTITUDES

## 7.1 Participants' use of the internet is becoming increasingly personalised, with a growing role for specialist apps and websites

The internet (and associated devices) continue to form a very important part of most participants' home and work lives, and they described a range of specific websites and apps they use to work or study from home, or to support their parenting. This is supplementary to their use of social media, messaging apps and content platforms such as YouTube for the same purpose.

*Could I do without [the internet] now? No I couldn't.*

Male, 68, Semi-retired, Pinner

*I've been using an app called Notion because I'm doing a lot of fitness programmes for work... It keeps everything together... You can add documents to it and have it all in the same place. It's easier.*

Female, 22, Sports Coach, Warwick

*There's a Norland Nanny that I follow on Instagram who has an app which I downloaded and paid for. There's just loads of information about looking after babies, activities for them and routines. So that's been really useful.*

Female, 34, Doctor, London

Two parents specifically mentioned that their children's schools were now working primarily with online resources, requiring their children to have iPads. In one case these were provided by the school but the other – a single parent – had to buy this herself. She had also had to upgrade her phone specifically so she could use an app that the school requires parents to have.

*I was on an iPhone 5 and the app stopped working... School has to have certain email apps to give you all the communications. I thought at that point "I can't not have a new phone". For shopping and things like that it doesn't really matter, but when it comes to school I need that communication line because that's how they communicate with everyone.*

Female, 45, PA, Woking

## 7.2 Most participants claimed to be spending less time on social media this year

Although social media remains an important part of most participants' daily life, the majority claimed to be devoting less time to it this year as a result of being generally busier with life post-lockdown.

*[Before] I'd go on Reddit, Snapchat, Twitter, TikTok, Instagram, Facebook. Now it's just Snapchat, TikTok... that's it.*

Male, 18, Student, Birmingham

Nevertheless, use of TikTok has remained high among its core user base of participants aged under 30. Although there were no new users this year, two participants who had claimed previously to be experimenting with TikTok alongside other platforms were now committed users. Users described its addictive quality and admitted spending long periods on there.

*It's TikTok that really gets me. It sucks me in. It doesn't spit me out. I stay there!  
The algorithm is so accurate and just knows exactly what you want to see.*

Female, 29, Solicitor, Edinburgh

*Last year it was very much a case of just getting to see what the fuss was. And then I just got a bit addicted. It's just... a time passer, you know? You just go on scroll, like, mindlessly.*

Female, 22, Nurse, Belfast

The popularity of TikTok has also impacted how participants use other platforms. For example, some users of Instagram have begun to focus more of their attention on videos rather than images.

*What I'm consuming [on Instagram] and what I'm seeing is just videos really. And there's Reels that you can post on Instagram now. It's basically just like TikTok.*

Female, 29, Solicitor, Edinburgh

### 7.3 Early adoption of BeReal may be an indicator of an appetite for greater authenticity on social media

The new social media platform BeReal, which encourages users to post candid photos (taken with both front and rear cameras) as soon as possible after a random notification, was starting to gain traction among young social media users in the UK around the time of this year's interviews.

Several participants (and the children of a few others) had recently started using BeReal, although its use was still largely at the novelty stage.

*You don't know when you're going to get the notification. It could be any time of the day...  
Once they give you a notification, you've got 2 minutes, I think, to post.  
So we would sort of do it more as who can post first out of our wee friendship group.*

Female, 22, Nurse, Belfast

*My sister kept going on about it. Then TikTok kept going on about it. So I was like "What's the worst that can happen?" But at that time I was the only person I knew that had it. My sister? I'm not downloading it just to see her stuff. So I made one of my friends download it. Then I realised quite a lot of my friends have it.*

Male, 18, Student, Birmingham

One aspect of the appeal of BeReal seemed to be the claim that it compels users to present a more authentic image of themselves. For some participants this appeared to tap into growing cynicism about the superficiality of much social media content, the role of influencers and the use of (e.g.) photo filters to present an exaggerated image of themselves.

*On Instagram and things like that people are trying to show – I don't know how to describe it – a more fancy side of themselves, like they're always out shopping or going for dinner, whereas BeReal comes up and if you're lying on your sofa sleeping or lying in your pyjamas... that's what you have to post.*

Female, 22, Nurse, Belfast

One potential concern about BeReal was how it might affect other people's privacy, in particular through the simultaneous use of front and rear cameras.

*My daughter's on it and just last week she got my wife into it. That's a pain in the bum. "What are you doing?" "I've got to take a photo." "Why?" "Oh, I've got to take a back photo and a front photo." "What of? Why?" I don't understand it.*

Male, 48, Engineer, Rural Derbyshire

*We find that we have to be really careful in work because in the office there's so much confidential information... so we're like crouching down in the corner on the floor trying to make sure we don't get anything confidential in the photo.*

Female, 22, Nurse, Belfast

## 7.4 Parents voiced numerous concerns about their children's use of social media

The current sample includes five parents of school-aged children. Almost all expressed concerns of one sort or another about their children's use of social media. These included the impact of extended exposure to short-form content on children's attention spans, social media images making children feel that they have to look a certain way, the potentially harmful effect of certain social media influencers, and the risks presented by online bullying and harmful content.

*She cares about what she looks like now and she's got a WhatsApp photo with her pouting... like that, like duck face... and she's 11-years-old. She's looking at these Instagram people who obviously have all this pretend stuff and fake tan and everything. And she feels like to be "in" she has to be like that, you know. And I don't like it at all.*

Male, 33, Labourer, Clacton

*The older one uses YouTube for his footballing stuff, but lately he's got into these people who chat while they're playing computer games and I hate that. I speak to all the parents and they're all having the same problem. We got an email [from school] last night about some influencer that they are starting to look at, and I questioned him. "Have you looked at this guy?" And he was just smiling "No, no." "You have, haven't you?" "Well, I might have looked at him once."*

Female, 45, PA, Woking

Two children of participants had experienced some form of online bullying in the past year. One parent in particular had found this deeply upsetting, but both expressed the view that they felt almost powerless to do anything about it.

*If I could delete that app from everybody's consciousness, I would. [Daughter] has been bullied relentlessly through it, she's been excluded from things on it yet, if I took it off her, it would raise her anxiety levels more because she doesn't know what's being said about her... When you've got your daughter absolutely inconsolable because of something that was said on social media that there's no evidence of now, how do you deal with that as a family, as a mother?*

Female, 45, Fundraising Manager, Cardiff

## 8. PRIVACY, PERSONAL DATA AND SECURITY

### 8.1 Knowledge of who owns different platforms was patchy

Elon Musk's takeover of Twitter (in the news for much of the fieldwork period) was recalled by many participants, and there was some spontaneous mention of Meta being the new name for the company behind Facebook. However, most participants did not appear to know (for example) that Meta owns Instagram and WhatsApp as well as Facebook.

*One of my favourite people from Facebook has gone on to Twitter, but I'm not going on to Twitter... I'm not interested in [the new owner of Twitter's] views, and the potential unbanning of Donald Trump is appalling.*

Male, 78, Retired, Warwick

### 8.2 Participants understand that websites use their behavioural data for targeting advertising at them, and most are relatively comfortable with this idea

Although few, if any, have any detailed knowledge of how the systems work, the majority of participants understood the broad principle that some search websites and social media platforms make money from serving advertising to users based on their behaviour on these platforms. They consider that this is a fact of life online, more or less unavoidable, and part of the trade-off they make to be able to use such services.

In line with findings from other recent waves, most participants claimed that they were relatively comfortable with this idea in principle, and felt that they had little or no option but to accept cookie notices, terms and conditions, etc.

*I don't understand all the cookie stuff because I don't have time to read through it all. And, you know, every site now has these cookies. And I just accept it because I've got to get on with what I'm doing, which is quite bad because I don't really know where all that data's going.*

Female, 45, PA, Woking

*They give you options, are you okay with this or that, you know? I just say that I'm okay, just to do what I want to do.*

Male, 41, NHS Support Worker, Liverpool

*I used to hate the thought of that. I've learnt now that I'm just not going to stress over it. At the end of the day my data will be out there.*

Male, 23, Odds Trader, Leeds

*You know if they're clever enough to work out a way to do things, and we want to use those things, that's the pay-off, isn't it? That's the trade-off.*

Female, 61, Unemployed, London

Over time, participants have become more familiar with personalised advertising based on their online behaviour, and fewer expressed any concerns about this compared to previous waves. In a few cases, these personalised ads were considered actively useful.

*If I am looking for a hoodie and it comes through "Look at these hoodies" sometimes I'll think "I actually really like that"; you know, it'll just save me some time.*

Male, 23, Odds Trader, Leeds

*We're having the stairs refitted and we needed the spindles and all of that stuff.. We were talking about it and up pop these businesses... We were just having a look and one of the ones that was on an ad we're actually getting the stuff from.*

Female, 45, Fundraising Manager, Cardiff

### 8.3 Participants are more concerned about devices listening in to their conversations at home

The suspicion that devices might be collecting information by listening in to participants' conversations was considered much more insidious than behavioural tracking via cookies, etc., especially by some older participants.

This was one specific barrier to entry cited by some of those who have not yet bought a smart speaker. Several who actually own smart speakers had stopped using them because of similar concerns, and others expressed suspicion of Alexa-like functionality built into other devices such as smart TVs.

*Now, this TV has Alexa in it, and I was very careful not to switch it on. I was very careful to make sure it was off, in fact... Google's bad enough. I'm not saying we go back to encyclopaedias, but if you rely too much on technology and other people's thoughts... you're just parroting what you've been told.*

Female, 61, Unemployed, London

*My wife didn't actually like it because it started to have a mind of its own. And it started to say things when we never even addressed it.*

Male, 68, Semi-retired, Pinner

*We have robots in the house in terms of all sorts of electronic devices, don't we, that can respond to your wishes by pressing a button. But I don't want to be talking to a robot.*

Male, 78, Retired, Warwick

## 8.4 Participants feel more confident than before about identifying scam emails, texts and calls

The overall level of concern over scam emails, texts and calls seemed to have subsided somewhat since last year, though participants continue to receive them. Familiarity with the format of many of these scams (e.g. fake parcel deliveries) is one factor, though several participants also praised specific technological interventions such as Google Mail filtering and the alerts that appear on their smartphones warning them that an incoming call might be a scam.

*I'll just delete them without looking at them. I have had one to pay £4.99 or something to pick up a parcel but I just deleted it. They're easy to spot most of the time. I would never click on any links.*

Female, 78, Retired, Edinburgh

*You get quite a few text messages and I just look at them... oh yeah! You've had a parcel delivered. Well, I've not ordered anything so why would I be getting a parcel?*

Male, 48, Engineer, Rural Derbyshire

*If I don't recognise the phone number I don't answer it now, because I've being caught in the past where I've answered it and, next thing, it's an automated message.*

Male, 61, Alarm Fitter, Lisburn, NI

*I've had phone calls from weird people, but I just tend not to pick up any more. On my phone it comes up with like scam... suspected scam now and things like that... So luckily I haven't had to deal with anything like that.*

Male, 33, Labourer, Clacton

However, there was one example of a participant's husband falling victim to a more sophisticated and targeted scam, focused on a particular area of interest (in this case, music) and shared unwittingly among a group of friends and colleagues by a trusted individual. Scams of this type could become a new area of concern in future, especially if participants' confidence in their ability to identify potentially fraudulent content turns into complacency.

*[Husband] had an email from [colleague] to say, "I've had this email from a lady who is looking to re-home a piano... anyone interested?" So he's like, "Oh my God, I'll email her back." [Her] email says "My name is Sarah. I've recently been widowed. My husband was a musician. He loved his baby grand piano. I can't sell it; it doesn't feel right. If you want it, if anyone wants it, please let me know. And all you have to do is pay the shipping." It gave the dimensions of the piano, the weight, the possible days it could be delivered. And then she said "All you have to do is transfer £560 to this particular account using these details", which [husband] did. Then it came back with a delivery date and time. So we're waiting for the piano. About an hour later than it was supposed to come he was like "I think I've been scammed".*

Female, 45, Fundraising Manager, Cardiff

## 8.5 Most participants were successful in identifying whether or not test scenarios were genuine or fake

To understand more about how people assess the authenticity of (for example) an email, social media post or profile, we presented participants with a short set of example scenarios (see Annex 3). The first was a (genuine) social media post from moneysavingexpert.com linking to an article about good deals on laptops available via Amazon Warehouse; the second was a (fake) social media profile for an actress and model called Lucy Scott; the third was a (genuine) sponsored post by David Beckham promoting Tudor watches; and the fourth was a (fake) delivery email purporting to be from DPD. These were the same scenarios used in Ofcom's quantitative research<sup>3</sup>.

Most participants were successful in identifying whether or not these examples were genuine or fake. Where errors were made, these were almost always because participants erred on the side of caution – for example interpreting the genuine post about Amazon Warehouse deals as fake.

In most cases participants used contextual information and personal experience as their primary means of assessing each case. So, for example, if they were familiar with a site such as moneysavingexpert.com they were more likely to trust their post. Conversely, if they'd had bad personal experiences of promises that were too good to be true in the past, they would be very cautious about clicking on similar links in future.

*Moneysavingexpert I would trust – that's Martin Lewis, isn't it? And I know Amazon do do that. Now, I don't know if I know that because we're really close to the Swansea distribution centre, and know people that work there.*

Female, 45, Fundraising Manager, Cardiff

*I wouldn't personally trust anything like that. When I used to use websites to get shoes that you couldn't get normally, it would say something like that, where it's a saving, but then they would just find a different way of incurring the extra cost.*

Male, 23, Odds Trader, Leeds

*Well, it says "Making loads of money". That to me rings alarm bells straight away. You know.*

Female, 45, PA, Woking

*I've got like thousands of Instagram messages, like... "Oh, hi lovely. How are you?" I literally just keep them in my Unread because I know that it's just like, "Did you know that last year I made this much money from travelling and working?", or something like that, and then it's one of them pyramid schemes or something.*

Female, 22, Sports Coach, Warwick

---

<sup>3</sup> Adults' Media Use and Attitudes report: [https://www.ofcom.org.uk/\\_data/assets/pdf\\_file/0028/255844/adults-media-use-and-attitudes-report-2023.pdf](https://www.ofcom.org.uk/_data/assets/pdf_file/0028/255844/adults-media-use-and-attitudes-report-2023.pdf)

Nevertheless, specific elements of the example scenarios were identified on numerous occasions as evidence that content might not be trustworthy, especially by younger and more social media-savvy participants. Within the fake DPD email, spelling mistakes and a dubious web link were frequently mentioned. Within the fake Lucy Scott social media profile, the username and following/follower ratio were identified several times as cause for concern.

*The word "weren't"... is that spelt correct? No, it's not...  
And what I do sometimes is hover the old mouse over where it's come from just to see  
where it is and some strange names, numbers come up etc.*

Male, 68, Semi-retired, Pinner

*That email address is wrong. dpdparceldelivery@telnet.be... where's that – Belarus or something?  
The spelling again is bad. The grammar, is bad... I think that's dodgy.*

Female, 45, Fundraising Manager, Cardiff

*Yeah, I would probably say that's fake. I think mainly the name like all the numbers at the end  
and the fact that she is following loads and loads of people and doesn't have any followers.*

Female, 22, Sports Coach, Warwick

*Her follower to following ratio is pretty bad, so it kind of seems like she might have just  
followed thousands of people in a hope that they might follow her back. Also she's got a lot  
of numbers after her name, which kind of sounds like it might have been generated by a bot.*

Male, 26, Tutor, London

# 9. NEWS

Interest in, and attitudes towards, news vary widely across the sample. In last year's wave we identified four types of news consumer within our sample, each with distinct attitudes and behaviours:

**News Hungry** (interested in news, conscious of its source and consuming it from multiple sources and platforms);

**News Sceptics** (suspicious of the mainstream media and the BBC in particular, feel disenfranchised by the mainstream media and more likely to be open to conspiracy theories);

**News Neutral** (no strong feelings about news, primarily interested in news as it affects them and tend to stick to one or two main sources);

**News Avoiders** (find news boring or distressing).

Most participants fell clearly into one of these four typologies, although a few demonstrated characteristics of more than one, and the groups were of roughly equal size.

## 9.1 Overall level of interest in news remains high, although there remains a hard core of News Avoiders

Over the previous two waves (and particularly during the early stages of the pandemic) there was a heightened interest in news, as it was important for participants to stay informed about infection numbers, rules and risks. Despite lockdowns coming to an end since then, the level of overall interest in news remained high this year. Indeed, several participants remarked that the compelling news agenda of the months leading up to the research (the cost-of-living crisis, Ukraine conflict, changes of UK Prime Minister) had made them more interested in news, and led them to consume more. In terms of our groups, therefore, this represents a slight swing from News Neutral to News Hungry.

*For me, current affairs has been just fascinating and at times terrifying as well.*

Male, 43, Web Officer, Cardiff

*I think I've watched the news more so live over the last couple of months particularly with, you know, the prime minister and the voting... not that I understand it all!*

Female, 56, Housing Officer, Coventry

On the other hand, a significant proportion of the sample (about a quarter) claimed that they were avoiding news as far as possible because they find it boring, distressing or depressing. In some cases the attitudes of these News Avoiders reflected broader concerns about their (or their family's) mental health.

*Covid taught me to stay away from watching the news because it used to have a kind of negative impact on my mood because... Let's be real: most of the time they prefer to report depressing news than something that's good in the world.*

Male, 23, Odds Trader, Leeds

*It just stresses me out. I just like going to work, going home, just dealing with my own life without having to worry about this, that and the other... what's happening in Ukraine and Russia and everything. Because whatever happens, I can't affect nothing.*

Male, 33, Labourer, Clacton

*If that comes on it gets muted until I find another channel. I can't handle it.*

Female, 49, Carer, Chelmsford

*I don't really look much at the news any more. The wife will say "Did you hear about...?" "No." She says "Why don't you track the news?" I say "Because it bores me." If we're having our dinner at 6.00 the news is on. Now I will always say: "Can we have dinner at 5.30 today?"*

Male, 61, Alarm Fitter, Lisburn, NI

## 9.2 A wide range of domestic and international news sources are used

Most participants claimed to be using the same news sources that they had used before. They mentioned a diverse range of sources, which they either access directly via their TV, radio or online, or on a story-by-story basis via links from social media and news aggregators like Apple News.

*Now and again I will dip in to Al-Jazeera as well if I think I need my global fix of news.*

Male, 43, Web Officer, Cardiff

*I knew about the Gabby Petito thing long before anyone knew about it here... because it's big in America, and I watch a lot of American stuff.*

Female, 61, Unemployed, London

Some participants (particularly some of the News Hungry and News Sceptics) claimed to be using social media proactively to access specific news content (e.g. Reddit and Twitter, to find out the grisly details of stories which are only partially covered on mainstream channels, or YouTube and Gettr to get alternative viewpoints on specific issues). Others (often News Neutral participants who are less interested in news but not consciously avoiding it) come across stories more randomly in their feed and use this as a way of staying loosely informed.

*There's an Instagram page that is really popular that a lot of people I know go on... Simple Politics... it's really good. It breaks down all the breaking news. All my friends follow it and a lot of people share it on my timeline.*

Female, 29, Solicitor, Edinburgh

*I've got Gettr now. It's like Facebook, but it's like a free speech sort of thing. And people give you the news which the mainstream media isn't giving you. When my father's generation goes, or maybe the generation under that, no-one will watch the news any more.*

Male, 33, Labourer, Clacton

## 9.3 The BBC continues to be the most common reference point for news content

The majority of the sample access BBC News on one or more platforms, and it continues to be seen as the reference point for other news media (a role perhaps reinforced by its prominent coverage of the Queen's death and funeral). Depending on the individual participant's viewpoint, it can be the gold standard for high quality news coverage, the market leader, the most politically neutral coverage or the most closely linked to an establishment point of view of which they are suspicious.

*I'd probably just go to the BBC first, just because it's so accessible and popular.*

Female, 22, Sports Coach, Warwick

*I like their reporting. It's fairly middle of the road.*

Male, 26, Tutor, London

*Since all this drama like having a Prime Minister for days or weeks... when they're doing debates, you know, these Parliamentary debates, I like watching them... I do that on the BBC.*

Male, 41, NHS Support Worker, Liverpool

The negative views of the News Sceptics who are most mistrustful of the BBC (and other mainstream media) are now deeply entrenched, and there was no evidence of this changing, not least because they generally avoid BBC News content.

*A lot of people say they're not always telling the truth, like my brother.  
Obviously, I'm going to trust my brother.*

Male, 18, Student, Birmingham

*I don't actually pay my licence fee. I stopped paying that. We don't really watch BBC and you know how I feel about them. Oh God! So I'm not paying it.*

Female, 49, Carer, Chelmsford

However, the attitude of some News Hungry participants who were previously critical of the BBC has become more positive. This is perhaps as a result of the news agenda becoming less contentious (e.g. less focus on Brexit and the pandemic).

*I'll start with BBC because it's the one I'm familiar with. I'm more than happy to pay my licence fee. I think it's great value for money. Obviously they try to remain neutral in terms of editorial oversight. I don't think it always happens, but you're going to get that, at times... I feel that maybe, more recently, they're pandering less to government.*

Male, 43, Web Officer, Cardiff

*I think that politicians should keep their hands off [the BBC]. It's an institution that we should be proud of. You know, there's a certain freedom of speech that's available through the BBC that with commercial channels is not the same.*

Male, 78, Retired, Warwick

# ANNEX 1

## Summary of participant profiles – wave 18

Sex	Age	Job	Location	Years in study
Male	18	Student	Birmingham	2
Female	22	Nurse	Belfast	4
Female	22	Sports Coach	Warwick	9
Male	23	Betting Odds Trader	Leeds	10
Male	26	Tutor	London	9
Female	29	Solicitor	Edinburgh	15
Male	33	Labourer	Clacton	17
Female	34	Doctor	London	17
Male	41	NHS Support Worker	Liverpool	2
Male	43	Web officer	Cardiff	17
Female	45	PA	Woking	2
Female	45	Fundraising manager	Cardiff	17
Male	48	Engineer	Rural Derbyshire	18
Female	49	Carer	Chelmsford	17
Female	56	Housing officer	Coventry	18
Male	61	Alarm Fitter	Lisburn, NI	15
Female	61	Unemployed	London	17
Male	68	Semi-retired	Pinner	17
Female	78	Retired	Edinburgh	15
Male	78	Retired	Warwick	6

# ANNEX 2

## Discussion guide

### General media use

What, if anything, has changed in your household since last time we spoke and what impact has that had on you?

What new media technology have you acquired in the last 12 months? What were the reasons for getting this new 'stuff'? Were they upgrades/replacement, or new items?

What factors influenced your choice of product/service? [PROBE ON THE ROLE OF INTRINSIC (E.G. FEATURES, PRICE) VS EXTRINSIC FACTORS (WORKING FROM HOME, REVIEWS, PESTER POWER)]

Have you changed your phone or phone package in the past year? How and why (or why not)? [PROBE IN PARTICULAR ON CHOICE OF HANDSET – MODEL, NEW VS SECOND-HAND, ETC. – AND ANY SWITCHING TO/FROM SIM-ONLY PACKAGES]

Thinking about the different electronic media you have access to, including TV, radio, the internet and gaming, which media are you using more than last year, and which are you using less? Why is this?

AUDIT: WHO PROVIDES THEIR TV/LANDLINE/BROADBAND/MOBILE – INCLUDING BUNDLES?

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

What prompted you to switch? How did you decide on which provider to go with?

Have you had any problems with your TV/phone/broadband/mobile service in the past year (either in terms of technical issues – including internet speed – or customer service)? [PROBE FOR DETAILS] What impact did not having access to [SERVICE] have on you?

### Screen time

How concerned are you about how much time you spend looking at a screen?

If so, what do you think you are missing out on by spending so much time in front of a screen? [PROBE: WHAT MIGHT THEY BE DOING OTHERWISE]

Does it have any other negative consequences (e.g. to your health)?

What steps (if any) have you taken to reduce your screen time?

Is all screen time the same or do you discriminate between (e.g.) "necessary" and "unnecessary" screen time or "good" and "bad" screen time? [PROBE FOR DETAILS]

[PARENTS ONLY] Do you have any concerns about how much time your children spend looking at a screen? [PROBE FOR DETAILS]

## Smart technology

Have you acquired any new "smart technology" in the last year (for example smartwatches, smart speakers, smart doorbells or thermostats)? [PROBE FOR DETAILS]

Are you using the smart technology you already own more or less than before? Why?

Has the novelty of this technology worn off at all?

What impact has this technology had on your day-to-day life (e.g. listening to the radio less, doing more exercise, feeling more confident about home security)?

What do you think are the benefits to you of this smart technology? Are there any downsides, or do you find them frustrating in any way?

How often do you use voice-activated "smart assistants" such as Alexa, Siri, etc. on your phone and/or other devices, and in what circumstances?

How effective are they and how do you feel about using them? (PROBE FOR +VES AND -VES)

## Aftermath of Covid-19

Would you say that life is back to normal after the Covid-19 pandemic? If not how, and why not?

[WHERE RELEVANT] When we spoke before you described technology playing a more important part in your life because of the pandemic. Is this still true? Or is technology less important now?

Do you feel more confident using technology than you did before the pandemic?

[WHERE RELEVANT] Are you still working from home some or all of the time? Has this changed in the last year? What are the benefits and drawbacks of this?

Did your experience of technology influence your decision to continue working at home (or stop working from home, as relevant)?

[WHERE RELEVANT] You previously said that you were doing more online shopping as a result of the pandemic... Has this changed in the last year? What are the benefits and drawbacks of this? [PROBE: HAVE THEY BEEN TEMPTED BACK TO THE HIGH STREET?]

## Cost-of-living crisis

There has been much talk in the media about a cost-of-living crisis facing the UK, with rising energy costs and food prices, for example. To what extent have you been affected – or do you expect to be affected – by this?

Which aspects of the crisis worry you most?

Have you been paying more attention to any particular sources of information about financial matters (e.g. Martin Lewis Money Saving Expert, social media, offline sources)? [PROBE FOR DETAILS]

Have you spent more time than before looking for good deals when (e.g.) shopping online? [PROBE FOR DETAILS]

Has this led to you buying from different places than you might have done previously, or do you still stick to the same sources (e.g. Amazon)?

Do you think that the mainstream media coverage of the cost-of-living crisis has been balanced and proportionate?

[WHERE RELEVANT] Last year, you accused the mainstream news media of "scaremongering", for example in relation to the Covid pandemic or petrol shortages. Is the cost-of-living crisis any different?

Have you had to make any economies in your day-to-day life? What about in terms of media and communications technology (e.g. streaming service subscriptions, mobile phone contracts, etc.)?

[SHOW LIST OF PAID-FOR MEDIA SERVICES – SHOWCARD 1]

Here is a list of a range of media services that people typically pay for. Thinking about the ones that you currently pay for yourself...

Which would be the first ones you would cut down on, or get rid of, if you had to save money (and why)?

Which would be the last ones you would be prepared to sacrifice if you had to save money (and why)?

## **Television: overview**

What have been your personal viewing highlights over the past year? Which programmes have you most enjoyed, or found most interesting? [PROBE FOR DETAILS]

[SHOW TV PROGRAMME PROMPT LIST – SHOWCARD 2]

Here is a list of some of the most-watched programmes on different platforms in the last year. Which of these programmes have you...

a) watched

b) particularly enjoyed

How do you watch television and streaming services now? What changes, if any, have you made to your TV viewing over the past 12 months, and why? [PROBE ON CONSUMPTION OF LINEAR VS ON-DEMAND TV, USE OF STREAMING SERVICES SUCH AS IPLAYER, ITV HUB, NETFLIX, DISNEY+ AND AMAZON PRIME, AND ROLE OF DIFFERENT DEVICES, ESPECIALLY WATCHING ON SMARTPHONES AND TABLETS.]

How much of your viewing is on your own vs with other people, and has this balance changed at all in the past year? Are there certain specific programmes (or types of programme) you tend to watch with others, or particular times of the week (e.g. Saturday night) when you'll watch together?

Of all the different television channels and streaming services you now have access to, which would you consider to be your "go-to", or first choice, channel or service?

Does this vary depending on the type of programme you're watching, or who you're watching with?  
[PROBE FOR DETAILS]

Is it easy to find good programmes to watch? How do you find them?

[WHERE RELEVANT] You previously said that one by-product of the pandemic was that you had started watching more box sets and fewer scheduled TV programmes. Is this still the case, or have you gone back to watching the way you did before the pandemic?

Are you still binge-watching series like you did before?

## Coverage of major events

One very high profile event this year was the death and funeral of Her Majesty Queen Elizabeth II...

How did you follow the coverage of this (e.g. TV, online), how closely and from which sources (BBC vs other providers)?

What did you think of the amount of airtime devoted to the Queen's death and funeral, and the tone of this coverage? Did that change your opinion of (e.g.) the BBC at all?

There have been other high profile events televised on the main channels this year (e.g. Commonwealth Games, Women's EURO 2022, Queen's Platinum Jubilee). How did you watch these (if at all)? [PROMPT: E.G. LIVE VS ON-DEMAND, IPLAYER VS REGULAR TV]

How valuable do you think it is that these events are covered on the mainstream television channels like BBC One, ITV1 and Channel 4?

## Multi-screen activity

Do you ever do other things (e.g. check social media, messaging friends, online shopping) while watching TV or streaming services? If so, what?

Does this impact on your enjoyment of the programmes at all?

How often is your other activity related to what you're watching (e.g. commenting on social media about a show or live sporting event you're watching)?

Are there particular programmes or occasions where your TV viewing gets your undivided attention?

## On-demand (OTT) or streaming services

Do you currently have a subscription to any streaming video services? Netflix, Amazon Prime Video, NOW TV, Disney+ and Apple TV+ are the main ones, but there are lots of others.

Have you got any new ones in the past year? What prompted this (e.g. a specific series)?

Are these household subscriptions (for the family) or personal ones?

Is it becoming more difficult to share accounts with friends and family these days? [PROBE FOR DETAILS]

Which ones are you watching more than last year, and which are you watching less?

Which services do you subscribe to on an ongoing basis and which do you opt in and out of from month to month? Why?

Has the amount of time you spend watching services like Netflix, Amazon Prime Video, NOW TV, Disney+ and Apple TV+ – or the way in which you watch them – changed?

What are you watching on these services? [PROBE FOR VIEWING OF ORIGINAL OTT CONTENT SUCH AS BRIDGERTON, TED LASSO, THE BOYS, AFTER LIFE, ETC. vs BBC/ITV ARCHIVE CONTENT SUCH AS PEAKY BLINDERS, CALL THE MIDWIFE, DOWNTON ABBEY]

Have you purchased any on-demand content (such as pay-per-view movies or sports passes) on top of any subscriptions you may have? [PROBE FOR DETAILS]

## **PSB content**

How much do you watch the traditional 'public service' channels like BBC One to Four, ITV1, Channel Four and Five these days (or programmes from those channels on the iPlayer, ITV Hub etc.)?

What programmes do you watch on these channels and why? [PROBE ON E.G. FORCE OF HABIT/ ROUTINE, ACCOMPANIMENT TO DAILY LIFE, SHARED VIEWING EXPERIENCES, DIFFERENCE TO PROGRAMMES AVAILABLE ELSEWHERE]

Do you ever watch the big Saturday night entertainment shows like Ant and Dec's Saturday Night Takeaway, The Masked Singer, Michael McIntyre's The Wheel or Strictly Come Dancing on ITV and BBC? What role do these programmes play in your life?

How much of your viewing of these channels is via streaming services like the BBC iPlayer or ITV Hub – whether it is on-demand or live streaming of programmes?

Do you use streaming services like the BBC iPlayer, All 4 or the ITV Hub to browse and discover new programmes to watch, or to access box sets, or do you just use them for catch-up? [PROBE FOR DETAILS]

What is your overall attitude to the BBC these days? Why do you say that?

## **Radio and other audio content**

When you think about the word "radio", what does it mean to you these days? Does it include things like podcasts, streaming music online, etc., or do you think of "radio" as separate from things like podcasts and streaming music online?

When, where and how are you listening to radio and/or music and other audio content these days? And how has this changed? [PROBE FOR ONLINE AND ON-DEMAND LISTENING, MUSIC STREAMING (E.G. SPOTIFY) USE OF PODCASTS, LISTENING VIA SMART SPEAKERS, DAB, DTV AND MOBILE DEVICES.]

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

Why did you choose to subscribe to this particular platform over the alternatives?

Do you still listen to CDs, records or tapes at all? [PROBE: HOW DO THESE FIT INTO THEIR LISTENING REPERTOIRE ALONGSIDE STREAMING SERVICES, IF AT ALL?]

Do you ever listen to podcasts? If so...

Which podcasts do you listen to and how often? What do you particularly like about them?

What makes you listen specifically to podcasts, rather than radio or music?

When do you listen to the radio (if at all) these days?

What do you get from listening to the radio that you can't just get from podcasts or a music service like Spotify (etc.)?

## **Smart speakers**

Have you ever had any problems asking your smart speaker to play the radio station you want?

Do you listen to different radio stations on your smart speaker compared to other ways you listen? (If so, why?)

Do you ever use your smart speaker for news updates?

Do you know the source of the news it provides?

Do you know how to change the default settings on your smart speaker which prioritise what news you get? Have you changed them?

Do you have any concerns about smart speakers (e.g. privacy, children accessing unsuitable content)?

If don't have a smart speaker, why not?

## **Internet: overview**

Has the way in which you access websites, apps, online services and social media changed over the past 12 months? [PROBE ON CONSUMPTION/ROLE OF DIFFERENT DEVICES, ESPECIALLY SMARTPHONES AND TABLETS.]

Would you say you are using more or fewer websites, apps, online services and social media these days? Why is that?

What new things are you doing online that you weren't 12 months ago? Who or what has inspired you to do/try them?

Have you done any more or less online shopping than previously? Why (not)?

Has the cost-of-living crisis made you more or less likely to shop online, as opposed to shopping at 'bricks and mortar' retailers?

Is there anything specific that you'd like to be able to do (online), but can't? What is stopping you?

Are there things you'd prefer not to do online (e.g. banking, accessing health services)? Have you suffered any negative consequences as a result of this?

## Social media

How has your use of social media (Facebook, Twitter, Instagram, LinkedIn etc.) changed over the past year? Which are you using, which ones are you using more or less, and why? Are you using any new ones? [PROBE ON ANY USE OF BEREAL, IF MENTIONED – WHY ARE THEY USING IT AND WHAT HAS THE EXPERIENCE BEEN LIKE?]

How often do you look at social media? Do you look at certain ones more than others? Why is this? [PROBE ON E.G. PERSONAL PREFERENCE VS ABILITY TO ACCESS SPECIFIC SOCIAL GROUPS]

[WHERE RELEVANT] Last year you suggested that you were trying to cut down on the amount of time you spend on social media. Were you successful? [PROBE FOR DETAILS.] Are you still trying to cut down? Why (not)?

What kind of content do you look at and/or follow on social media (e.g. friends, hobbies, celebrities, brands)?

How much of the content you look at on social media is posted by "influencers"? Is it clear to you when they are posting content which is advertising a product or brand, as opposed to voicing their own opinions? [PROBE FOR SPECIFIC EXAMPLES.] Does this vary from platform to platform?

[YOUNGER PARTICIPANTS ONLY: SHOW EXAMPLE OF INFLUENCER ADVERTISING – SHOWCARD 5A]

Take a look at this example of an influencer social media post. Why do you think David Beckham is saying good things about this product? What specific aspects of the post lead you to believe this?

What kind of content do you post on social media (e.g. photos, videos, comments)? Do you post (or share content) more or less than you did last year?

Do you have any concerns about how your posts on social media might impact other people's perceptions of you, or create other problems for you now or in the future? [PROBE FOR DETAILS]

[FOR THOSE WITH CHILDREN UNDER 16] Do your children use social media at all? Which ones?

How aware are you of what your children are doing/viewing online? How closely do you monitor their internet use? Why (not)? How (e.g. looking over their shoulders, setting content filters, managing privacy settings, etc.)?

How much do you trust the information that you see on social media? How do you evaluate whether or not something you see shared on social media is true or not?

Have you come across any information that is not true on social media in the last year? [PROBE FOR DETAILS] Is this any more or less common on some platforms than others?

Do you ever come across fake social media profiles? [PROBE FOR DETAILS]

When you see the profile of a social media user you don't personally know, how do you evaluate whether or not it's genuine? Is this more or less difficult on some platforms than others?

[SHOW EXAMPLE OF SHARED SOCIAL MEDIA POST – SHOWCARD 3] Take a look at this example of a social media post. What specific aspects of the post lead you to believe that it may or may not be true and/or trustworthy?

Would you normally look this closely at posts to see if they can be trusted? What thought process do you typically go through?

[SHOW EXAMPLE OF SOCIAL MEDIA PROFILE – SHOWCARD 4] Now take a look at this example of a social media profile. What specific aspects of the profile lead you to believe that it may or may not be genuine?

Would you normally look this closely at profiles to see if they can be trusted? What thought process do you typically go through?

## **Messaging apps**

Do you use any of the instant messaging apps (e.g. WhatsApp, Facebook Messenger, Snapchat)? [PROBE FOR USE OF APPS FOR MESSAGING VS VOICE AND VIDEO CALLING]

Has your usage of them changed in the past year? Have you started using any new ones?

## **YouTube and other VSPs**

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

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

Do you watch videos on any other sharing platform (e.g. Twitch, Snap)?

Do you have your own channel, or post video content to YouTube, TikTok, etc.? What about sharing, reviewing or commenting on videos?

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

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

## **eDemocracy**

Have you used the internet in the last 12 months to access information from the government or public services like the NHS, and/or to contact (local) government or public services? [PROBE FOR DETAILS.]

[WHERE RELEVANT] Do you ever feel that you are at a disadvantage compared to other people because so much contact with government and public services is now online?

## **Harmful/hateful and inappropriate online content**

Have you (or anyone in your family) seen anything in the last 12 months – on social media, video sharing sites, messaging apps or any other online media you use – that made you feel uncomfortable, upset or negative in any way? [NB: PARTICIPANT MUST BE GIVEN THE OPTION NOT TO ANSWER IF THEY ARE UNCOMFORTABLE DOING SO.]

[IF YES] What was it about it that upset or offended you?

Was it aimed at you, or someone else?

Was it aimed at a particular group or type of person (e.g. religious, sexuality, disability, gender)?

What, if anything, did you do about it (e.g. ignore it / report it / respond to it / make a comment / unfriend that person, etc.)? Why?

[IF HARMFUL CONTENT WAS REPORTED] How easy was it to report? What response did you get?

Did it put you off visiting that site/platform again?

[IF NO] Would you know what to do if you were to see something that upset or offended you online, for instance on social media or messaging apps (e.g. ignore it / report it / respond to it / make a comment / unfriend that person, etc.)?

Overall, would you say that you've seen more or less harmful, hateful or inappropriate content online in the last year, compared to previous years?

Are you aware of any new government legislation for regulating the internet being discussed at the moment? [PROBE FOR DETAILS]

[IF YES...] How do you think this might affect your personal experience of using the internet?

Do you think it will have a broader impact on society?

## **Privacy and security**

What concerns, if any, do you have about giving your personal data (e.g. address, phone number, email address) to websites or apps?

In what circumstances are you happy to give your personal data to websites or apps? [PROBE FOR DETAILS] What, if anything, would you expect in return?

Have you had any bad experiences in the past year as a result of giving your personal information to a website or app?

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

Do you feel you have a good understanding of who your personal data is being used by, and what for? Does this give you any cause for concern?

Are you aware of who owns platforms like Facebook, Twitter, YouTube and TikTok? Does it matter?

Do you know how websites like Google and social media companies make money?

How aware are you of websites like Google and social media such as Facebook and Instagram serving up specific posts and advertising to you based on content you have previously viewed, liked or commented on?

What do you think are the benefits and/or drawbacks of this?

Have you received any "scam" emails, texts or phone calls in the past year from people pretending to be (e.g.) your bank, Inland Revenue, Royal Mail or other such organisations, trying to get you to pay them money, or get hold of personal information such as your bank details? [PROBE FOR DETAILS]

How convincing was the scam? Were you tricked?

[IF NOT] How long did it take you to realise this was a scam? How did you spot this?

What did you do about it (e.g. report it, mark it as spam)? [IF NOTHING] Why not?

[OLDER PARTICIPANTS ONLY: SHOW EXAMPLE OF SCAM EMAIL – SHOWCARD 5B] Please take a look at this example of an email. What specific aspects of the message lead you to believe that it may or may not be a scam?

Do you have any other particular concerns about the security of your information online at the moment? Do you always feel safe when you are online? If not, when and why not?

## **Gaming**

Do you ever play games (either on your computer, phone, tablet or on a games console)? [PROBE FOR DETAILS OF WHICH PLATFORMS ARE USED FOR GAMING]

Do you have any kind of gaming subscription (e.g. Playstation Plus, Xbox Live, EA Play, Apple Arcade)?

How much of your gaming is online (either because the game itself is online, or because you're using the internet to talk to other people while you play)?

Which games (or what types of game) do you play most often, and why?

What motivates you to play online? [PROBE FOR DETAILS, E.G. TO RELAX, TO KILL TIME, A SOCIAL ACTIVITY, JUST FOR FUN]

Do you play and/or chat with other people (online) while you are gaming? Are these friends or strangers?  
[PROBE FOR DETAILS]

Has your gaming activity changed at all over the past year and, if so, why?

## News

How are you accessing news these days? How has this changed at all in the past year? [PROBE SPECIFICALLY ON THE ROLE OF SOCIAL MEDIA, WORD-OF-MOUTH IN NEWS CONSUMPTION.]

What would you consider to be your main sources of news nowadays? [ASK UNPROMPTED THEN PROMPT WITH LIST OF PROMINENT NEWS SOURCES – SHOWCARD 6]

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

[WHERE RELEVANT] Do you use social media for accessing particular types of news (e.g. important news stories, local news, fun/celebrity news)? Is this different to how to use other media to access news?

Do you use different social media platforms for different types of stories?

Do you look specifically for news on social media or do you just come across it in passing?

[IF IT DOESN'T COME UP SPONTANEOUSLY] How much of your news comes from the BBC? Is this more or less than in the past?

What do you think of BBC News?

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

News websites and apps, as well as social media, sometimes choose which specific news stories to show you in your feed based on your prior behaviour. How aware are you of this happening, and how do you feel about this?

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

Which specific news sources do you trust most and least, and why? [ASK UNPROMPTED THEN PROMPT WITH LIST OF PROMINENT NEWS SOURCES – SHOWCARD 6]

Has coverage of the pandemic made you more or less sceptical about the news and information you see on TV, radio or online?

Have you seen anything in the past year that you would consider to be "misinformation"? If so, how did it make you feel and how did you react?

If you weren't sure about how truthful a particular news story was, what steps would you take to check it (if any)? [PROBE FOR DETAILS]

# ANNEX 3

## Showcards

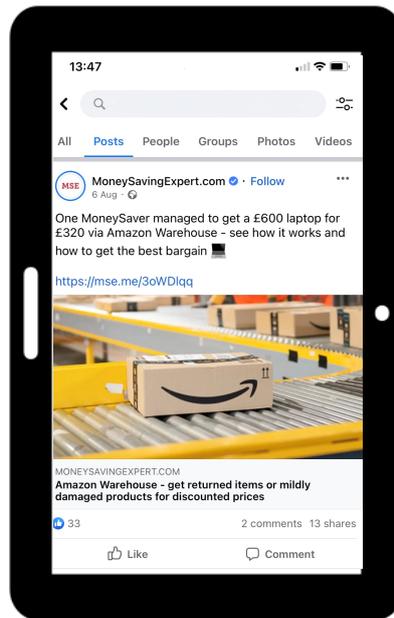
*SHOWCARD 1*

	Apple Music	Home broadband	Sky Cinema
Mobile phone contract	BT Sport	Spotify	Netflix
Basic Sky/Virgin TV	BBC licence fee	Disney+	Amazon Prime Video
Apple TV+	NOW	Pay per view movies	BritBox
	ITV Hub	Sky Sports	

*SHOWCARD 2*

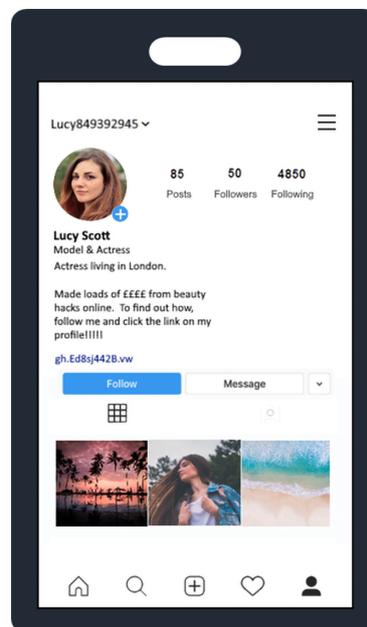
Bridgerton	The Responder	Strictly Come Dancing	The Thief, His Wife and the Canoe	Call the Midwife	Great British Bake Off
Trigger Point	After Life	Peaky Blinders	The Boys	Britain's Got Talent	Line of Duty
Ted Lasso	The Marvelous Mrs Maisel	Julia	Stranger Things	The Tourist	The Simpsons
Death In Paradise	Sherwood	I'm a Celebrity.. Get Me Out of Here	Stay Close	Inventing Anna	The Masked Singer
Gogglebox	Top Gear	The Green Planet	Derry Girls	The Flight Attendant	Succession

SHOWCARD 3



Source: MoneySavingExpert.com, Facebook, 6th August 2022 (MoneySavingExpert Facebook page - <https://www.facebook.com/MoneySavingExpert/>), (Facebook post - [https://www.moneysavingexpert.com/deals/deals-hunter/2020/09/amazon-warehouse/?utm\\_source=facebook&utm\\_medium=social&utm\\_campaign=teamblog&source=FBORG-TEAMBLOG&utm\\_content=1659627344&fbclid=IwAR3VoTp1FBTdeS8z0tGyKKdggqI3pxg9tJplnELEkm91e5I08xtio5fXq5Lw](https://www.moneysavingexpert.com/deals/deals-hunter/2020/09/amazon-warehouse/?utm_source=facebook&utm_medium=social&utm_campaign=teamblog&source=FBORG-TEAMBLOG&utm_content=1659627344&fbclid=IwAR3VoTp1FBTdeS8z0tGyKKdggqI3pxg9tJplnELEkm91e5I08xtio5fXq5Lw)).

SHOWCARD 4



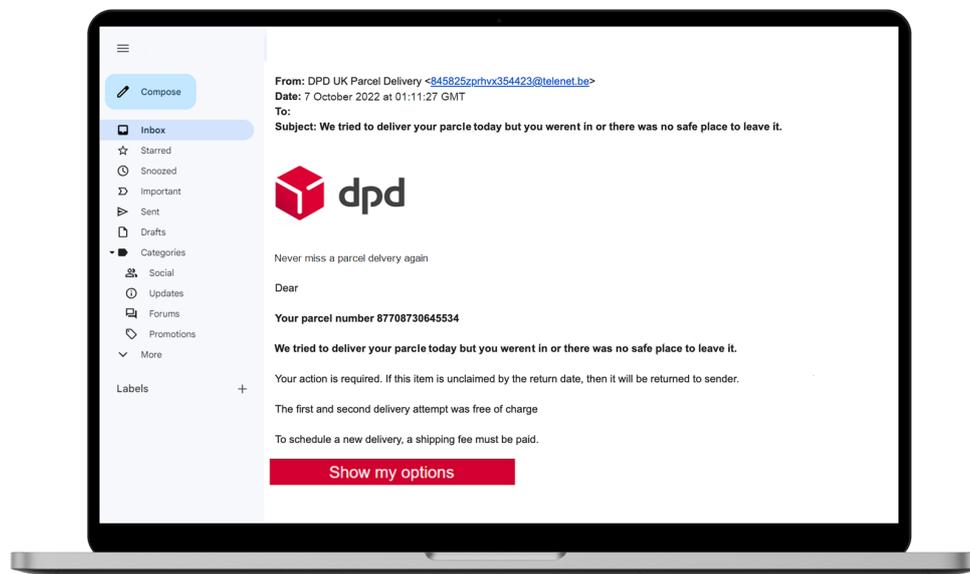
Source: This profile is a fictional profile. Images were taken from Pexels.

SHOWCARD 5A



Source: David Beckham Instagram account, 8th July 2022 (Instagram handle – davidbeckham), (Instagram post - <https://www.instagram.com/p/CfwYD24owMB/?hl=en>).

SHOWCARD 5B



Source: DPD Website – Phishing ([https://www.dpd.co.uk/content/about\\_dpd/phishing.jsp](https://www.dpd.co.uk/content/about_dpd/phishing.jsp)).

*SHOWCARD 6*

TikTok	Channel 4 News	Sky News	Al Jazeera	The Sun
talkSPORT	BBC News	Reddit	The Mirror	Twitter
CNN	Facebook	Huffpost	YouTube	Mail Online
GB News	ITV News	FOX News	LBC	Apple News+
	The Times	The Guardian	The Telegraph	