

Adults' Media Use and Attitudes report

2020/21



Making
sense
of media

Overview

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

The Communications Act 2003 places a responsibility on Ofcom to promote, and to carry out research into, media literacy. This report supports our work in this area and our wider [Making Sense of Media programme](#).

Key findings:

Digital exclusion

- The Adults' Media Lives study found that **the pandemic had been the catalyst for a step-change in digital skills for some participants**. Several participants with limited digital skills had embraced new technology and become more confident online.
- **However, 6% of households still did not have access to the internet** in March 2021 and this could be particularly disempowering in the current climate. This suggests a decrease in the proportion of households without internet access, from 11% in March 2020. However, due to an enforced methodology change, this decrease should be seen as indicative only.
- **Narrow internet users (who complete fewer activities online) generally had a lower than average critical understanding of the online environment.**
- **10% of internet users only used a smartphone to go online.** This was more likely among those aged 25-34, in the DE socio-economic group, and more likely among women than men. Smartphone-only internet users were more likely than average to be narrow internet users.

Digital media use and activities

- **In 2020, a broad range of devices were used to go online. Smartphones were the most likely device,** used to go online by 85% of internet users.
- **A majority of adults were gaming in 2020; 62% of adults were playing games on any type of device.** In particular, a vast majority of younger adults were gaming; 92% of 16-24s played games on any device and 67% were doing so online, with or against other people.
- **Younger adults were more varied in their social media use and more likely than average to have a profile on most sites or apps,** whereas older social media users heavily favoured Facebook.

Critical understanding

- **Most internet users were not aware of all the ways in which companies can collect their personal data online.** The most common reasons that internet users gave for allowing companies to collect and use their data were having appropriate reassurances on the protection and use of their data: including that they can opt out at any point and the company will stop using their data; or that their information will not be shared with other companies.
- **Some internet users were unaware of the potential for inaccurate or biased information online;** 3% of internet users believed that all information they find online is truthful, 30% thought most is, and 24% didn't even think about whether the information they find is truthful or not.
- **A gap persists between confidence in recognising advertising online and actual awareness.** 84% of internet users were confident that they could recognise advertising online. But only 62% of search engine users identified paid-for listings in search results and understood that this was the only reason those results appeared at the top of the list.

Drawing largely on our quantitative Adults' Media Literacy Tracker, the report provides evidence on media use, attitudes and understanding among UK adults aged 16 and over. More detail, including additional demographic analysis and all questions that were not possible to fit in this report, can be found in the accompanying [chart pack](#) and [interactive report](#).

This report also draws on our qualitative [Adults' Media Lives research](#), quantitative [Technology Tracker CATI omnibus survey](#) and quantitative [Digital Exclusion Survey](#) to provide an over-arching narrative on the key themes of adults' media experience in 2020.

In previous years, the **Adults' Media Literacy Tracker** has been conducted face-to-face, in-home using Computer Assisted Personal Interviewing (CAPI). In 2020, due to the Covid-19 pandemic – and in common with other Ofcom tracking studies with an element of in-home interviewing – it was not possible to conduct the research in this way. For this study, a combination of a postal sample, with respondents either completing the survey online or through being sent a paper questionnaire, and an online panel was used. Further information on the methodology can be found in the [technical report](#) accompanying this report.

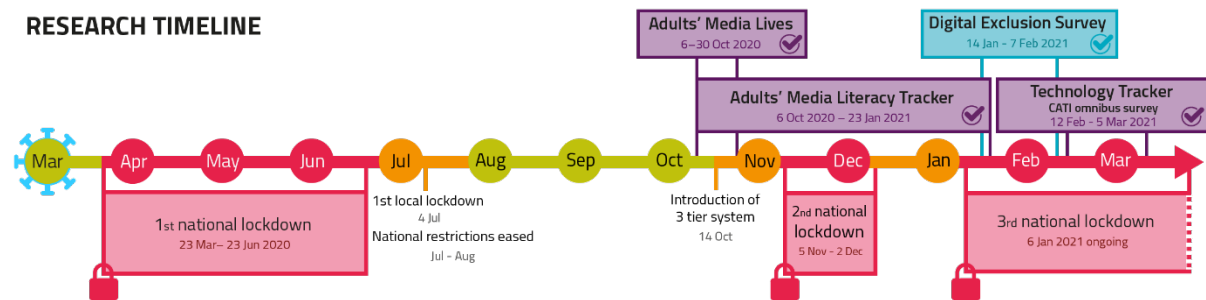
As with the Adults' Media Literacy Tracker, the existing face-to-face methodology of the **Technology Tracker** had to be adapted this year, and a similar approach of post-to-web and post-to-paper was adopted. In addition to the main Ofcom Technology Tracker survey, a supplementary CATI (telephone) omnibus survey was commissioned to provide Ofcom with some key statistics that are not easily gathered using other methodologies. The CATI omnibus survey was conducted with adults aged 18+ living in the UK (not 16+).

Our **Adults' Media Lives** research is a qualitative, longitudinal, ethnographic video-based project which has been running since 2005. The research has followed the same (as far as possible) 18 participants over time, interviewing them at home to understand their relationship with digital media. This year, 60-minute interviews were conducted online via Zoom.



The **Digital Exclusion Survey** was conducted as an ad-hoc piece of research, aiming to reach those who are offline and to understand their reasons for being so. Fieldwork was conducted using the random-probability NatCen Panel with the option to complete the survey via telephone. The NatCen Panel is formed of people recruited from the random-probability British Social Attitudes (BSA) survey.

As a result of this substantial shift in tracker methodology, direct comparisons between the current and previous waves are not possible. Where feasible, we refer to substantial changes or trend direction where we can be confident that there has been a genuine shift in behaviour. We also provide commentary on any changes that we believe have been primarily driven by the methodology change. This year's findings may also have been affected by the fact that the fieldwork was conducted during the pandemic; this is likely to have had a significant impact on adults' media use, behaviour, and attitudes.

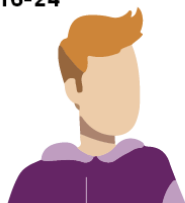
All elements of the research took place during autumn 2020 and winter 2020/21. The timeline below provides some brief context on the pandemic situation in the UK at the time of fieldwork.









Media use by age: a snapshot

 More likely than the UK average
 Less likely than the UK average

16-24








 **99%** use the internet at home
 (among 18-24 year olds)
 **96%** use a smartphone
12% only use a smartphone to go online
 (among internet users)
 **88%** have a social media profile
 (among internet users)
 **92%** play games on any device

54% correctly identify advertising on Google
 (among search engine users)
 **53%** are aware that some websites will be
 accurate or unbiased and some won't be
 (among search engine users)
 **28%** are aware of all four surveyed ways in which
 companies can collect personal data online
 (among internet users)

25-34







 **99%** use the internet at home
 **96%** use a smartphone
 **15%** only use a smartphone to go online
 (among internet users)
 **89%** have a social media profile
 (among internet users)
 **82%** play games on any device

59% correctly identify advertising on Google
 (among search engine users)
62% are aware that some websites will be
 accurate or unbiased and some won't be
 (among search engine users)
34% are aware of all four surveyed ways in which
 companies can collect personal data online
 (among internet users)

35-44






 **99%** use the internet at home
 **96%** use a smartphone
13% only use a smartphone to go online
 (among internet users)
 **91%** have a social media profile
 (among internet users)
 **76%** play games on any device

62% correctly identify advertising on Google
 (among search engine users)
64% are aware that some websites will be
 accurate or unbiased and some won't be
 (among search engine users)
36% are aware of all four surveyed ways in which
 companies can collect personal data online
 (among internet users)

45-54






 **97%** use the internet at home
 **94%** use a smartphone
8% only use a smartphone to go online
 (among internet users)
86% have a social media profile
 (among internet users)
62% play games on any device

68% correctly identify advertising on Google
 (among search engine users)
69% are aware that some websites will be
 accurate or unbiased and some won't be
 (among search engine users)
 **52%** are aware of all four surveyed ways in which
 companies can collect personal data online
 (among internet users)

55-64









94% use the internet at home
86% use a smartphone
8% only use a smartphone to go online
 (among internet users)
 **73%** have a social media profile
 (among internet users)
 **43%** play games on any device

70% correctly identify advertising on Google
 (among search engine users)
71% are aware that some websites will be
 accurate or unbiased and some won't be
 (among search engine users)
 **51%** are aware of all four surveyed ways in which
 companies can collect personal data online
 (among internet users)

65+



 **77%** use the internet at home
 **55%** use a smartphone
 **2%** only use a smartphone to go online
 (among internet users)
 **59%** have a social media profile
 (among internet users)
 **30%** play games on any device

58% correctly identify advertising on Google
 (among search engine users)
 **72%** are aware that some websites will be
 accurate or unbiased and some won't be
 (among search engine users)
39% are aware of all four surveyed ways in which
 companies can collect personal data online
 (among internet users)

Media use by socio-economic group: a snapshot

More likely than the UK average
 Less likely than the UK average



97% use the internet at home
91% use a smartphone
4% only use a smartphone to go online (among internet users)
83% have a social media profile (among internet users)
65% play games on any device
65% correctly identify advertising on Google (among search engine users)
68% are aware that some websites will be accurate or unbiased and some won't be (among search engine users)
48% are aware of all four surveyed ways in which companies can collect personal data online (among internet users)



96% use the internet at home
94% use a smartphone
8% only use a smartphone to go online (among internet users)
83% have a social media profile (among internet users)
74% play games on any device
66% correctly identify advertising on Google (among search engine users)
72% are aware that some websites will be accurate or unbiased and some won't be (among search engine users)
49% are aware of all four surveyed ways in which companies can collect personal data online (among internet users)



93% use the internet at home
88% use a smartphone
12% only use a smartphone to go online (among internet users)
85% have a social media profile (among internet users)
64% play games on any device
61% correctly identify advertising on Google (among search engine users)
62% are aware that some websites will be accurate or unbiased and some won't be (among search engine users)
32% are aware of all four surveyed ways in which companies can collect personal data online (among internet users)



86% use the internet at home
74% use a smartphone
18% only use a smartphone to go online (among internet users)
77% have a social media profile (among internet users)
50% play games on any device
53% correctly identify advertising on Google (among search engine users)
53% are aware that some websites will be accurate or unbiased and some won't be (among search engine users)
27% are aware of all four surveyed ways in which companies can collect personal data online (among internet users)

Media use by gender: a snapshot

More likely than females/males
 Less likely than females/males

Females





92% use the internet at home
87% use a smartphone
13% only use a smartphone to go online (among internet users)
84% have a social media profile (among internet users)
63% play games on any device
61% correctly identify advertising on Google (among search engine users)
63% are aware that some websites will be accurate or unbiased and some won't be (among search engine users)
37% are aware of all four surveyed ways in which companies can collect personal data online (among internet users)

Males



93% use the internet at home
84% use a smartphone
7% only use a smartphone to go online (among internet users)
80% have a social media profile (among internet users)
61% play games on any device
63% correctly identify advertising on Google (among search engine users)
68% are aware that some websites will be accurate or unbiased and some won't be (among search engine users)
43% are aware of all four surveyed ways in which companies can collect personal data online (among internet users)

Media use by nation: a snapshot

 More likely than the UK average
 Less likely than the UK average

ENGLAND



93% use the internet at home
85% use a smartphone
10% only use a smartphone to go online
 (among internet users)
82% have a social media profile
 (among internet users)
62% play games on any device

62% correctly identify advertising on Google
 (among search engine users)
65% are aware that some websites will be
 accurate or unbiased and some won't be
 (among search engine users)
40% are aware of all four surveyed ways in which
 companies can collect personal data online
 (among internet users)

SCOTLAND



93% use the internet at home
82% use a smartphone
10% only use a smartphone to go online
 (among internet users)
83% have a social media profile
 (among internet users)
58% play games on any device

63% correctly identify advertising on Google
 (among search engine users)
65% are aware that some websites will be
 accurate or unbiased and some won't be
 (among search engine users)
43% are aware of all four surveyed ways in which
 companies can collect personal data online
 (among internet users)

WALES



90% use the internet at home
85% use a smartphone
10% only use a smartphone to go online
 (among internet users)
85% have a social media profile
 (among internet users)
67% play games on any device

66% correctly identify advertising on Google
 (among search engine users)
63% are aware that some websites will be
 accurate or unbiased and some won't be
 (among search engine users)
36% are aware of all four surveyed ways in which
 companies can collect personal data online
 (among internet users)

N IRELAND



88% use the internet at home
92% use a smartphone
12% only use a smartphone to go online
 (among internet users)
83% have a social media profile
 (among internet users)
60% play games on any device

55% correctly identify advertising on Google
 (among search engine users)
63% are aware that some websites will be
 accurate or unbiased and some won't be
 (among search engine users)
40% are aware of all four surveyed ways in which
 companies can collect personal data online
 (among internet users)



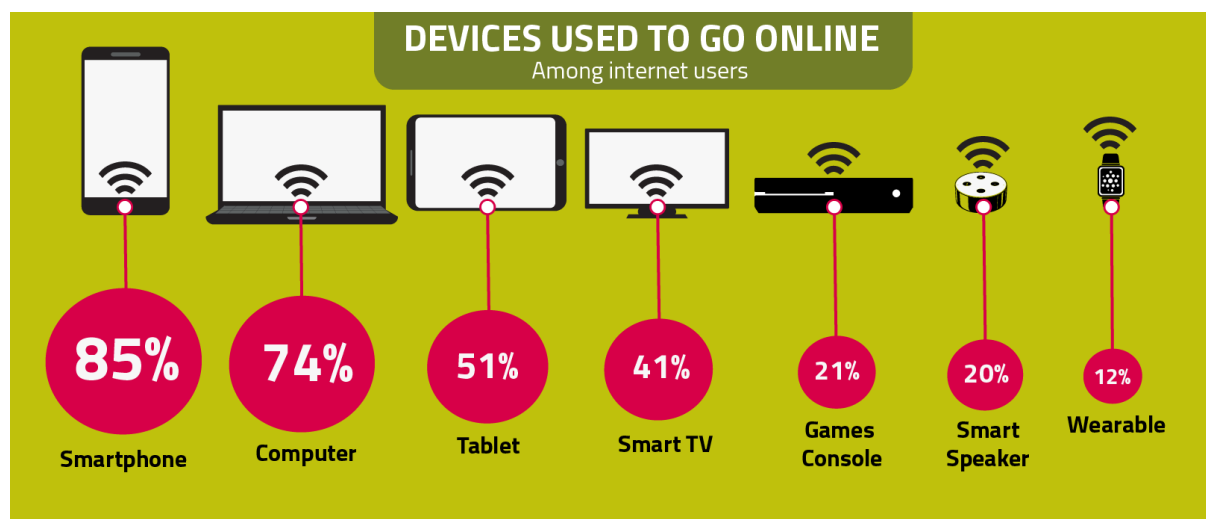
Summary of key findings

Digital media use

A broad range of devices were used to go online, with smartphones the most likely to be used

In 2020, the vast majority (85%) of all adults used a smartphone and this rose to more than nine in ten for those aged 16-54. Use was lower for those aged 65+ (55%), who were more likely than average (29%) to use a mobile phone that wasn't a smartphone.

The smartphone was the device most likely to be used to go online; 85% of internet users used it for this purpose. A broad range of other devices were used to go online in 2020 including computers¹ (74% of online adults), tablets (51%) smart TVs² (41%), games consoles (21%) and smart speakers (20%).

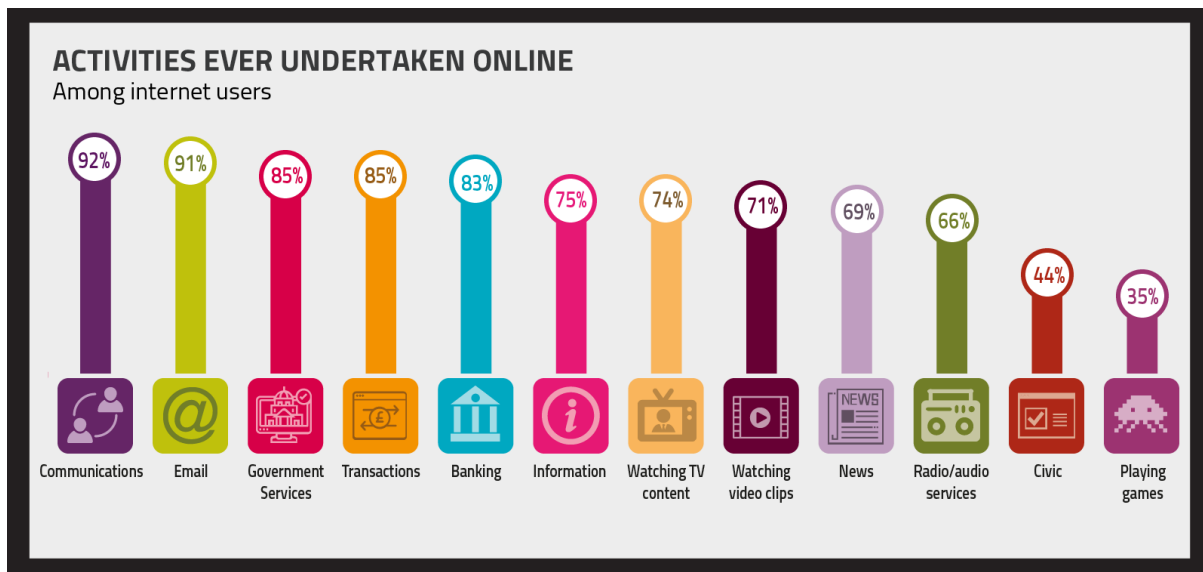


In 2020, and most probably partly due to the pandemic restricting face-to-face services and interactions, many different activities were being conducted online. A majority of internet users were going online to communicate (e.g. via voice or video calls or via social media), send and receive

¹ 'Computer' covers desktops, laptops and notebooks.

² A TV set that connects directly to the internet and doesn't need a set-top box, computer or games console to go online.

emails, complete or look at government services (e.g. complete a tax return or look for public service information), buy things (including grocery shopping), use online banking, find information (e.g. for leisure activities), watch TV content, watch short clips via video sharing platforms, access news websites and listen to radio or audio services.



The participants in the qualitative Adults’ Media Lives study had been very heavily reliant on technology, and especially the internet, during the pandemic. This applied across work, social and leisure time, with the internet seen as essential for the practicalities of daily life, for keeping in touch with work, friends and family, and for entertainment.

“I think what it showed is how essential it is... if it was down, what we would lose. Quite a lot of things to be honest with you – from jobs, to entertainment, to keeping in touch.” Male, 65, Semi-retired, Pinner

“It was the lifeline to outside the flat. It meant that we could still see our family's faces. It meant that we still had entertainment.” Female, 32, Doctor, London

“I don't go to the shops very much. I do order in groceries online. We try and do most of the shopping online these days.” Male, 76, Retired, Warwick

Device preference and use varied by age

Older internet users, aged 65+, were less likely to go online via most devices asked about, and in particular, they were less likely to have adopted smart technology, such as a smartphone, smart TV, or smart speaker. However, they exhibited a preference for larger-screen devices; they were more likely than any other age group to use a computer to go online (87%) and just as likely as the average internet user to use a tablet to go online.

Internet users aged 25-34 had different device habits; they were less likely than average to use a computer (66%) and more likely to only use a smartphone to go online (15%).

In fact, despite the broad range of devices used to go online across all internet users, 10% of internet users were only using a smartphone to go online, and as well as 25-34s, this was more likely among

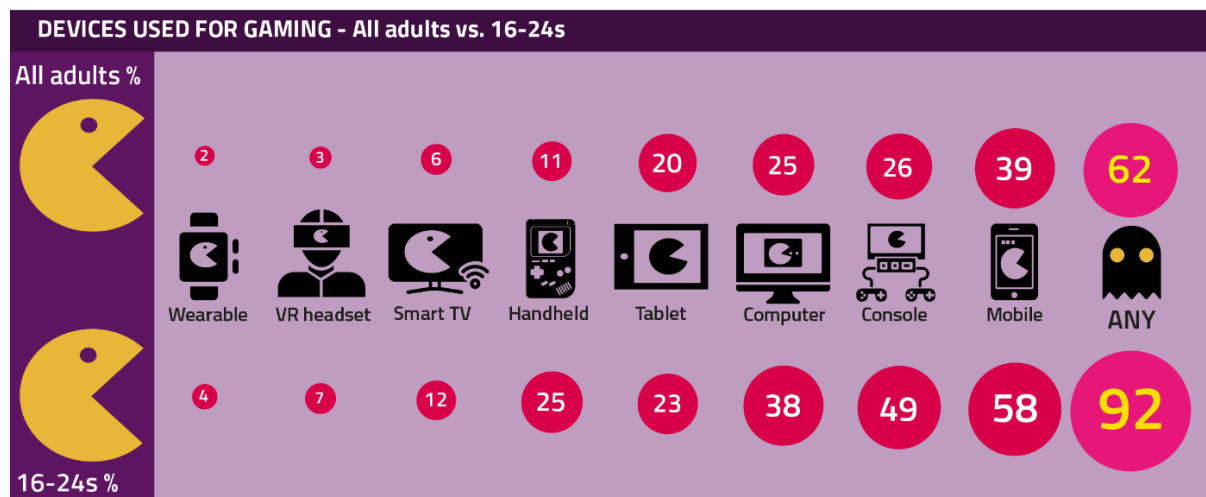
those who were the most financially vulnerable³ (17%), of working age (16-64), in the DE socio-economic group (21%), and among women than men (13% vs. 7%). This dependence on a smartphone as the only device used to go online has the potential to limit use, or cause difficulties, as discussed later in the [Narrow internet users](#) section.

Gaming

Most adults were playing games during the pandemic

Sixty-two per cent of adults were playing games on any type of electronic device in 2020.⁴ This suggests an increase on previous years, as adults sought new forms of entertainment under the restrictions of the pandemic.⁵ The most popular device for playing games was the smartphone (39% of all adults) followed by a games console (26%) or computer (25%). Thirty-five per cent of internet users played games online, with or against other people.

Gaming of any type was higher than average among those aged 16-44, who were also more likely to play games online. In particular, the vast majority of younger adults were gaming; 92% of 16-24s played games on any device and 67% did so online.⁶ Those aged 16-24 were more likely than average to use most devices for gaming. Once again, the tablet was an exception: it was used consistently for gaming by all ages.



³ Financial vulnerability is a measure that has been devised by Ofcom to better understand the impact of financial vulnerability on ownership and use of communications services. The analysis creates three distinct household types by combining household income and the size of the household (including number of children).

⁴ Our survey references 'games' generically, but this could be any type of game e.g. Fortnite, FIFA, Candy Crush, Words with Friends, etc. More detail on the types of games people are playing can be found in [Online Nation 2020](#).

⁵ This increase in playing games has been evidenced in other reports, such as the 29.9% increase in the [UK games industry valuation](#) in 2020, published by UKIE (the UK gaming industry association), and research from [Opinium](#) shows that the overall UK gaming population increased by 63% over the course of the lockdown period in 2020.

⁶ Gaming, and in particular online gaming, was also observed to be a popular form of entertainment among children aged 5-15 confined during lockdown. See [Children and Parents: Media Use and Attitudes report 2020/21](#) for more information.

Those who were most financially vulnerable were also more likely than average to play games on any device (75%) and to do so online (45%).

There was no difference by gender in the overall incidence of gaming, but device use did differ. Women were more likely than men to play games on a smartphone (43% vs. 35%), whereas men were more likely to use games consoles (32% vs. 21%) or computers (29% vs. 21%). Perhaps linked to device preference and the types of games being played, men were also more likely than women to play games online with or against others (37% vs. 27%).

Social media

A majority of internet users were using both social media and messaging sites or apps

Eighty-two per cent of internet users had a profile or account on a social media site or app and 84% used messaging or chat sites or apps. There was a large degree of overlap between the two groups with 75% of internet users using both, while 91% used either.

Social media use was consistent across socio-economic group and gender, and although messaging sites or apps were less likely than average to be used by internet users in DE households, and more likely to be used by female than male internet users, more than three in four DE and male internet users were using these sites or apps to keep in touch with friends, family, neighbours or colleagues.

Although internet users aged 55+ were the least likely to have a social media profile, or to use messaging sites or apps, a majority were using both, and more than three in four were using either.

Younger adults were more varied in the social media sites or apps they used

Most social media users used Facebook (83%) or Instagram (57%). Many of the sites or apps which had lower usage levels among adult social media users were used more by younger adults. For instance, among social media users aged 16-24, 72% had a Snapchat profile (vs. 30% of all social media users), 23% had a Reddit profile (vs. 10% of all social media users) and 22% had a Twitch profile (vs. 8% of all social media users).

This was also borne out in the number of social media sites or apps used. The mean number used decreased with age: from 5.1, for social media users aged 16-24 to 1.9, for those aged 65+. Overall, the mean number of sites or apps used by all social media users was 3.5.

TikTok became more popular in 2020. Ofcom's *Online Nation 2020* report reported that TikTok had increased its reach among UK adults from 5.4 million to 12.9 million between January and April 2020.⁷ Our survey found that 21% of social media users had a TikTok profile, and that this was one of the youngest-skewing sites or apps: 54% of social media users aged 16-24 had a profile, halving to 27% of social media users aged 25-34, and the trend of diminishing use continuing with age.

In the *Adults' Media Lives* study, a few of the younger participants had started using TikTok. Their use of the platform was still considered to be in the novelty phase and a source of slight embarrassment, as it was perceived as being targeted primarily at young teens.⁸ Users remarked that TikTok is highly addictive; this leads to extended periods of use.

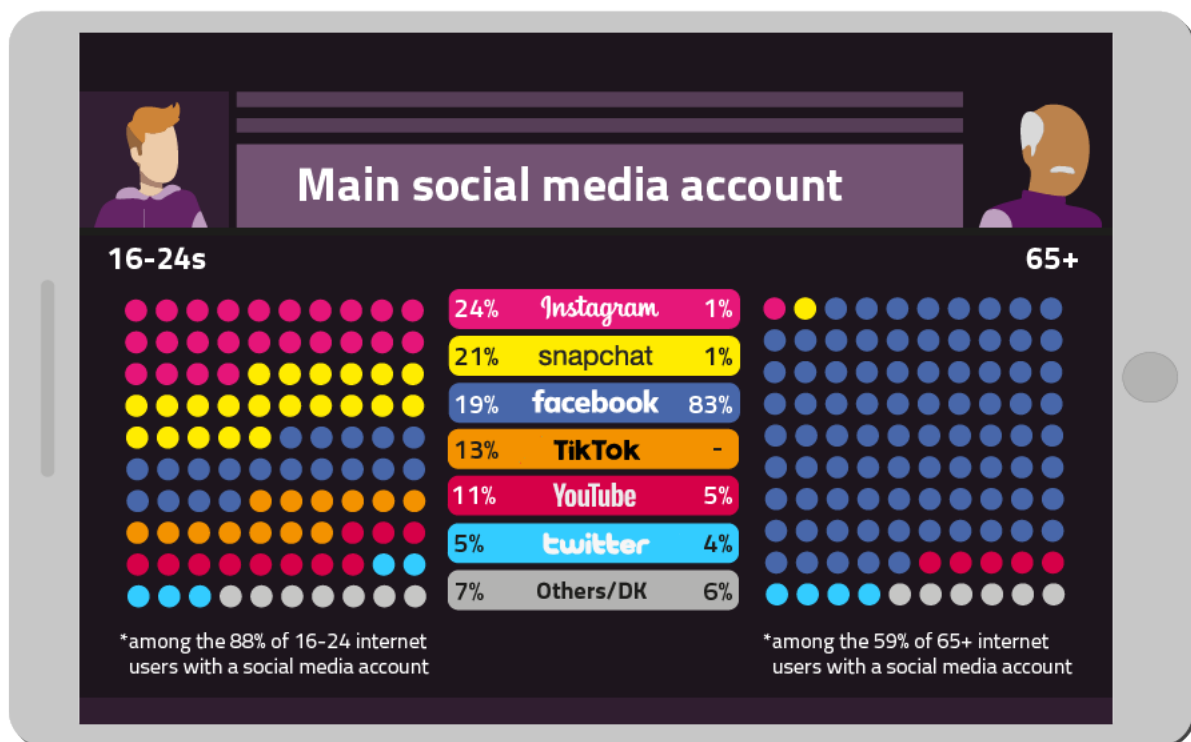
⁷ See [Online Nation 2020](#) for more information on TikTok take-up and use among adults in 2020.

⁸ TikTok was seen to be especially popular among younger age groups in our children's research. See [Children and Parents: Media Use and Attitudes report 2020/21](#) for more information.

“I’m quite embarrassed to say I’ve downloaded TikTok out of curiosity. Whether or not it will stay on the phone I haven’t decided yet.” Female, 20, Student, Belfast

“I was averaging – at one point – over nine hours a day, on my phone, which is literally outrageous. There’s no need for that whatsoever. I was a massive fan of TikTok... to the point I had to delete the app because it was taking over my life – and at the age of 27 that’s not something that you should admit... The algorithm is so accurate that you just kept on wanting to see what the next one was; there was literally no way that you could go on it for five minutes.” Female, 27, Trainee Solicitor, Edinburgh

There was wide variation in the apps/sites that social media users aged 16-24 considered as their main social media account; 24% said Instagram, 21% Snapchat, 19% Facebook and 13% TikTok. Those were the four most common responses, but a range of other services were mentioned as well.



Ofcom’s research into video-sharing platforms also showed that younger users of those sites were accessing them more regularly than older users.⁹ For example, Snapchat users aged 18-24 were more likely to use the app at least daily compared to all users of Snapchat aged 13+ (49% vs. 18%).

Facebook was preferred by older social media users

Although Facebook had the highest overall use of any social media site or app among social media users (83%), it was the only site or app where social media users aged 16-24 were less likely than average to have a profile (69%).

Instead, Facebook was most popular among older social media users – 91% of social media users aged 65+ had a Facebook profile and 83% considered it to be their main social media account. The

⁹ See [User Experience of Potential Online Harms within Video Sharing Platforms](#) for more information on take-up and use of video-sharing platforms.

latter figure may be partly on account of the 49% of social media users aged 65+ who said that Facebook was their only social media account (compared to 16% of all social media users).

Social media users aged 45-64 were also more likely than average to say Facebook was their main social media account.

WhatsApp and Facebook Messenger were more than twice as likely to be used than any other messaging site or app

Fewer messaging sites or apps were used than social media sites or apps among users of each (mean of 2.4 vs. 3.5) and their use was concentrated on two sites or apps used by the majority of messaging site or app users: WhatsApp (83%) and Facebook Messenger (74%).

As with social media sites, there were some more niche sites or apps that were more likely to be used by 16-24 year old users such as Discord (32% vs. 12% of all messaging site or app users), HouseParty (17% vs. 7%) and Instagram Threads (10% vs. 5%). Again, the mean number of sites or apps used decreased with age, from 2.7 among messaging site or app users aged 16-24 to 1.8 for users aged 65+.

In the *Adults' Media Lives* study, Facebook and WhatsApp groups were seen to have played a valuable role in fostering neighbourhood spirit and providing a support network for those in need during lockdown. Both existing and newly formed groups were cited several times as creating social cohesion and a sense of community.

"I live on a housing estate, and that has a Facebook group... all the neighbours know each other well. One of our neighbours actually died from Coronavirus and it was nice to see all the neighbours come together to rally around the family." Female, 20, Student, Belfast

"During lockdown there was a street WhatsApp group set up... It has been brilliant actually... In London you hardly ever know your neighbours so it's really nice to have that community feeling." Female, 32, Doctor, London

Levels of interaction on social media sites or apps varied across users

Twenty-five per cent of social media users said they often shared, posted or commented on social media sites or apps, and a further 34% said they sometimes did this. But a proportion were less active in contributing their own content: 20% said they usually just 'liked' things and a further 20% said they tended only to read things on these sites or apps, and rarely liked or posted anything.

Social media users aged 16-24 were more likely to be active engagers: 34% often shared, posted or commented. In contrast, social media users aged 55+ were more likely only to read things (30%). Men were also more likely than women to be passive users, only reading and rarely liking or posting anything (26% vs. 15%).

The *Adults' Media Lives* study found that several participants were making a conscious effort to be less active and/or visible on social media. This was for a variety of reasons, including concerns about how much time they were spending online, negative feedback from fellow users, and concerns about the potential impact of their digital footprint on future career prospects.

"When I got this new phone it would send me weekly screen updates and I think I was averaging six and a half hours a day on my screen – and a lot of that was just mindless scrolling that was completely pointless, adding nothing to my life." Female, 32, Doctor, London

"I'm not doing Facebook anymore and I'm not doing [Facebook] Messenger... I went on the political side of things; I think I got too involved... Some people don't want to know. They don't want to hear it. They call you "The Tin Hat Brigade" so I'm thinking: what is the point?" Female, 47, Stay-at-home Mum, Rural Essex

"In my job, it's really strict and I just get really paranoid now. So, I've not got my full name on any of my social medias, I'm not on Facebook anymore and I've changed my Twitter name to a really cryptic name... I could post something that is completely innocent and everyone in my generation would find funny, but it would only take one person to be offended by it... I would not want to work this hard to get this far to be given a warning by the regulator for a stupid TikTok that I put up." Female, 27, Trainee Solicitor, Edinburgh

Attitudes to online content

Women and older adults were more likely to agree that internet users must be protected from seeing inappropriate or offensive content

Six in ten (61%) of those who go online agreed that internet users must be protected from seeing inappropriate or offensive content. Agreement was higher among women (65%) than men (57%).

Women were also more likely than men to disagree with the statement: *"I think it is important that people can say what they want online even if it is controversial or hurtful to others"* (53% vs. 42%), and less likely than men to agree with the statement: *"I think people should have the right to hide their identity online in order to express their views anonymously"* (35% vs. 41%).

There was also a split across these attitudinal questions by age. Adults aged 65+ were more likely than average to agree with protection against seeing inappropriate or offensive content (70%), while younger adults aged 16-24 were less likely to agree (48%).

Similarly, those aged 55+ were more likely than average to disagree that people should be able to say whatever they want online. Attitudes to anonymity online diverged both before and after the age of 45; those aged 16-44 were more likely to agree than disagree that people should be able to hide their identity online, whereas those aged 45+ were more likely to disagree.

Personal data, privacy and security

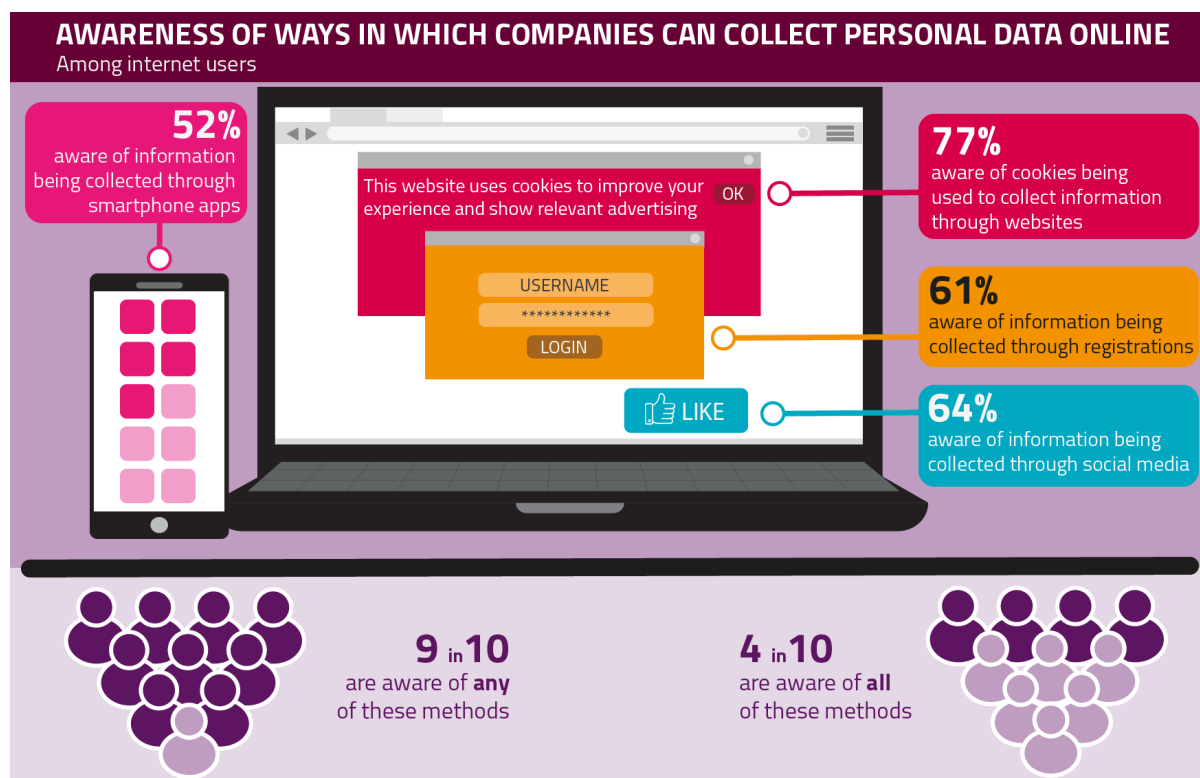
A large majority of those who go online considered themselves confident internet users, but a smaller proportion were confident in managing access to their personal data

The majority (83%) who go online considered themselves to be confident internet users. But this fell to 61% who said they were confident in knowing how to manage who has access to their personal data online.

Those aged 65+ were less likely to feel confident, both online and in managing their personal data. Women were also less likely than men to feel confident on both measures.

Most internet users were not aware of all the ways in which companies can collect their personal data online, but were more willing to allow use of their data if they had appropriate reassurance on its protection and use

Our survey prompted internet users with four ways in which online companies can collect their personal information and asked which they were aware of.¹⁰ A majority of internet users were aware of each of these individual methods, and 91% were aware of any of them. However, only 40% were aware of all four, suggesting that a large proportion of internet users are not fully equipped to manage their personal data online.



The proportion aware of all four methods rises to around half of internet users aged 45-64 and those in ABC1 households, but falls to less than a third of internet users aged 16-24 or in C2DE households.

Although 21% of internet users were not happy for companies to collect and use their personal information at all, for many, there were some reassurances or trade-offs that made them more willing to accept data collection. The most common reasons that internet users gave for being happy with data collection and use were centred on receiving appropriate reassurance about its protection and use: 44% were happy for companies to collect and use personal information if they could opt out at any point and the company would stop using their data; 39% were happy if they were clear about how companies used their information; and 38% were happy if they were reassured that companies would not share their information with other companies. A minority were more willing to allow their data to be collected and used in exchange for perceived benefits such as receiving relevant special offers they might like, access to a free service or getting a personalised service.

¹⁰ The four ways were: (i) using 'cookies' to collect information about the websites people visit or what products interest them; (ii) collecting information from social media accounts i.e. about users' interests, 'likes', location, preferences; (iii) asking customers to register with a website and opt in/out of receiving further information from them or their partners and; (iv) using apps on smartphones to collect data on users' locations and what products and services interest them.

In our *Adults' Media Lives* study, there was evidence of a wide disparity in appetite for knowledge about personal data and privacy. A minority of the more tech-savvy participants had started actively seeking to educate themselves about big tech's use of personal data via books, documentaries and podcasts, whereas most participants still had limited knowledge and a few had chosen to deliberately avoid finding out too much.

"I've started using alternatives to Google Search and the Google ecosystem where I can. My search engine at the moment is Quartz. It's necessary for there to be some data sharing for search engines by virtue of the product itself, but their commitment is that they minimise that and to be fully transparent about how they use that data. I've also signed up to be an early tester of Neeva, which is another search engine that's come out of Silicon Valley with the same kind of ethics."

Male, 37, Financial Services Exec., London

"You know there was that programme that came on Netflix and it was about social media? Because I don't want an opinion on it, I didn't watch it; I didn't want it to scare me." Female, 20, Student, Loughborough

Nevertheless, almost all participants displayed a greater level of awareness and understanding than previously about how their personal data is collected and used (e.g. to target them with personalised advertising). Some claimed to have modified their behaviour as a result, but the majority felt that the collection and use of their personal data was inevitable no matter what they did.

"The cookies that come through as well, I've found myself not accepting them as much now that I've actually researched what they actually mean. In the past I just quickly clicked: yeah, yeah, yeah, yeah, whatever; and then I've realised that you're actually giving all your personal information and stuff away." Male, 22, Betting Odds Trader, Leeds

"The thing that you see a lot on Facebook is all about how TikTok is gathering all of your data to use against you. You see the conspiracy theories, but I think your phone is constantly tracking you anyway." Female, 20, Student, Belfast

"It requires so much effort to try and reduce your data footprint that it's almost impossible... I don't go on Facebook, but Instagram is owned by Facebook and so is WhatsApp... It's impossible to escape... Facebook isn't even the worst offender, the worst offender is Google and unless you start to put your tin foil hat on and only use Dogpile, it's quite difficult to escape Google." Male, 25, Tutor, London

Most internet users were taking some type of security measure online

The vast majority (90%) of internet users said that they, or someone in their household, took at least some type of security measure to protect themselves online. The most common security measures, and the only ones undertaken by a majority of internet users, were: using strong passwords (63%); using security software such as anti-virus or anti-spyware package (58%); and downloading the latest software updates onto devices when prompted (57%).

When buying things online, 71% of those who said they purchases online made 'appropriate'¹¹ checks before entering their payment details, while 26% did not tend to make any legitimate form of

¹¹ 'Appropriate' checks include; checking if the site looks secure (padlock symbol or https), if familiar with the company or brand, if there is a link to another reputable service like PayPal, if there is a guarantee my details won't be shared with anyone else and if the site is recommended by friends and family.

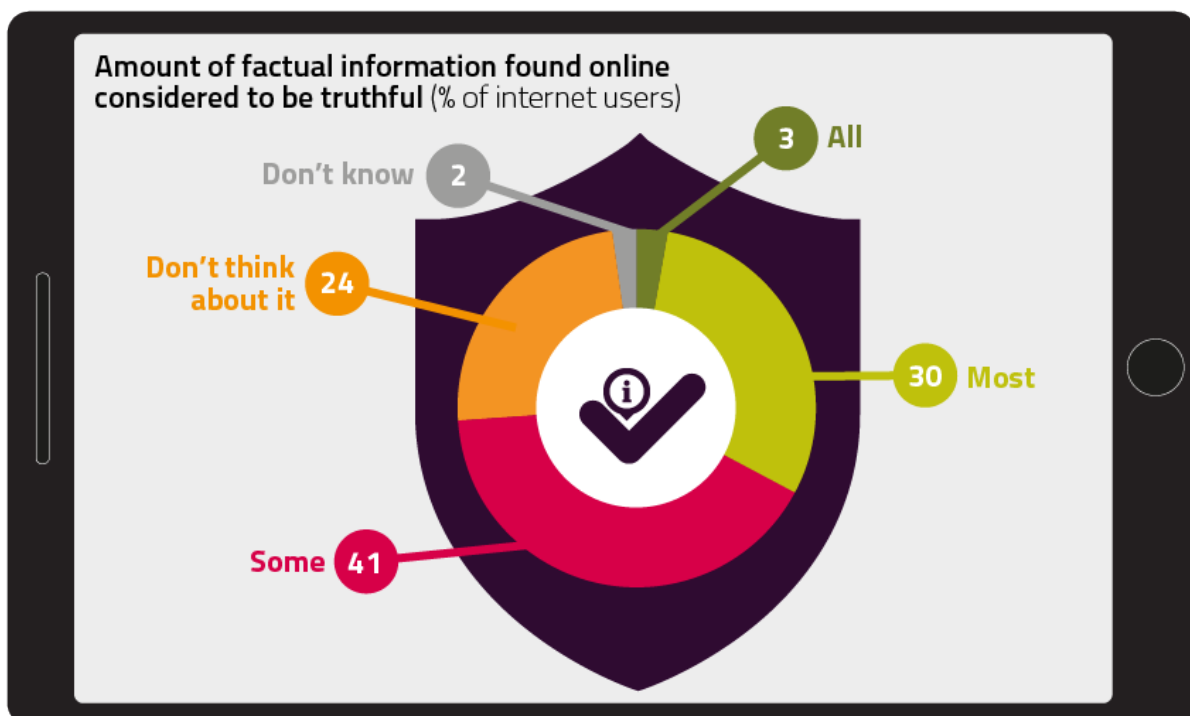
evaluation.¹² A similar proportion (27%) tended to make inappropriate, or no, checks before registering their personal details online.

This suggests that most internet users are taking media-literate steps to minimise risk and harm online. However, a significant minority remain who are not equipped to manage their online personal and financial data safely.

Trust and misinformation

Some internet users were unaware of the potential for inaccurate or biased information online

The critical thinking skills needed to assess and evaluate information found online are lacking in a minority of internet users: only 3% believed that *all* the information they find online is truthful, while 30% thought that most of it is, and 24% did not consider the potential trustworthiness of online information at all.



Of those who did consider the truthfulness of online information, a large majority (86%) sought to make credible checks on the accuracy of the information.¹³ Similarly, 80% of social media users made checks on the news stories or articles they read or saw on social media to verify they were true.¹⁴

¹² 'Inappropriate' checks included checking if the site is listed by a search engine. 'Not making any checks' included entering details if it is the only way to get the desired product or service, or entering details whenever required.

¹³ Checks included: if the same information appears on different websites, if the website address looks genuine, the credibility of the information (author's name or link to original publication), if the site looks professional, whether the site is regularly updated, whether people they trust use the site.

¹⁴ Checks included: if it was by an organisation they thought was trustworthy or had heard of, how professional the article looks (e.g. are there spelling mistakes, do the images or videos look high quality), if the same

A majority (65%) of search engine users were aware that some websites that appear in their search results could be inaccurate or biased, but 18% thought they would all have accurate and unbiased information, and a further 10% did not consider this at all. Search engine users aged 16-24 tended to be less media-literate in interpreting the accuracy of search results; 31% thought that if they had been listed by the search engine, these websites would have accurate and unbiased information. Indeed, savviness, or at least wariness, seemed to increase with age: search engine users aged 65+ were more likely than average to give the media-literate response that some results will be accurate and some won't be.

The *Adults' Media Lives* study found that most participants had seen misinformation relating to Covid-19 on social media. Almost all of the sample supported measures to try and contain the spread of Covid-19, in part guided by their own experience of it, or via friends and family, who had either been affected or were working on the front line. As a result, there was broad consensus about the kind of Covid-related content which might be classed as misinformation.

"I follow some people on Instagram who like to mouth off about what Boris is doing and how none of it's real and everyone should just be able to do what they want but I know that it's real because I've had it." Female, 20, Student, Loughborough

"It's clearly true. All my mates think that I would be a sceptic, but my auntie had it and my best mate John had it... I think all these protesters in London are stupid... If any of them get it and go to the NHS for treatment they should get turned away." Male, 31, Labourer, Swansea

Many felt confident distinguishing fact from fiction and argued that this kind of content was quite easy to spot, remarking that a quick look at the profile of the poster was often enough to help them judge the trustworthiness of a post.

"There's been a whole lot of silly things come through, which is probably fake news... about China, obviously, and 5G." Male, 59, Unemployed, Lisburn, NI

"My brother-in-law is possibly one of the worst in the country for it... Some of the things that he puts on Facebook; I don't even read them now. I just see his name and scroll past it." Male, 46, Engineer, Rural Derbyshire

"There are ways of picking out within social [media] what isn't true. It's usually to do with what flags are in a profile or what it says in the bio." Male, 41, Web Officer, Cardiff

Awareness of advertising and funding on TV and online

Awareness of funding continues to be higher for TV channels than the internet, and higher for BBC services than commercial counterparts

Seventy-eight per cent of adults were aware that the licence fee funds BBC TV programmes. However, awareness was lower for the BBC's online services, despite the fact that they have the

information appears elsewhere, what other people have said about the article, thinking about what the article is about to assess the likelihood it is true, whether the person who shared it was someone they trusted, if it was a first-hand account.

same funding source; 63% knew that it funds the BBC iPlayer and 61% knew that it funds the BBC website. This pattern follows a long-term trend.

There was also a gap between awareness of funding sources for BBC and commercial services. Seventy-two per cent of adults correctly identified advertising as the main source of funding on commercial TV stations, lower than the equivalent measure for BBC TV. Similarly, more adults were aware that iPlayer and the BBC website are funded by the licence fee than were aware that YouTube (51%) and search engines (49%) are funded by advertising.

Understanding how different media and online services are funded enables a better understanding of the motivations of the companies or organisations providing the content on such services. Those who are unaware of the funding methods – particularly for online advertising-funded services such as YouTube and search engines, which was also where the largest proportion were unaware – may be more susceptible to commercial messages when they don't realise that they are being sold to.

A gap persists between confidence in recognising advertising online and actual awareness

About eight in ten (84%) internet users were confident that they could recognise advertising online. However, as we have seen in previous years, there remains a gap, for some, between claimed and actual ability to identify it.

When shown a sample image of a Google search for walking boots, a majority of search engine users (62%) could identify paid-for results in the search results (i.e. the first four results that appeared on the example image of a search listing with the word 'Ad') and understood that this was the only reason these results appeared at the top of the list.¹⁵ However, this was far smaller than the proportion who said they were confident in recognising advertising online. Among the reasons given by those responding incorrectly, 21% of search engine users thought the results appeared at the top of the list because they were the best/most relevant results, and 18% thought it was because they were the most popular results.

This suggests that almost two in five search engine users lack the ability to recognise a commercial message online. Those who were the most financially vulnerable were less aware of search engine advertising than average (54% selected *only* the correct response) so may be more likely to be susceptible to commercial messages.

Compared to previous years, the proportion providing the correct response has increased. However, we believe this is due to the change in methodology to an online survey in 2020. Previously, respondents were shown an example of a search engine listing via a paper showcard (when face-to-face), but in the online survey this showcard is displayed on the screen, which is a more realistic setting. Therefore, we feel that the latest results more accurately reflect adults' perception of paid-for ads online.¹⁶

¹⁵ See the [example search for walking boots](#) shown alongside this question. Respondents can select more than one response to this question. 62% is the proportion who gave only the correct response and did not select any other options.

¹⁶ We observed a similar pattern in our children's research for an equivalent question testing children's awareness of advertising in search results. See [Children and Parents: Media Use and Attitudes report 2020/21](#) for more information.

A majority of internet users (68%) were aware of personalised advertising. But a minority of this group appear not to be fully aware of how it works: 18% thought that everyone would see the same adverts as them and 13% responded 'don't know'.

Digital exclusion

A minority of households still did not have access to the internet in March 2021 and this could be particularly disempowering in the current climate

According to the telephone omnibus survey conducted in conjunction with Ofcom's Technology Tracker, 6% of households did not have access to the internet at home as of March 2021 and a further 1% of adults aged 18+ had access to the internet at home but did not use it.

This suggests a decrease in the proportion of households without internet access from 11% in March 2020, but this movement should be considered as indicative only. Enforced methodology changes to the survey limit direct comparability with previous years so, while these figures could ordinarily indicate an uplift in internet access compared to previous years, the change could also be due to the change in methodology, rather than any real change in internet access.¹⁷ Findings from *Adults' Media Lives*, discussed below, do support the idea that the pandemic has led to a step-change in digital access.

During a year in which face-to-face interactions and facilities have been restricted, those who remain offline may have felt more acutely the disadvantages of being offline, such as social isolation and being less able to complete certain activities. In particular, the groups more likely not to have internet access at home – and therefore, to be more at risk of digital exclusion – were those aged 65+ (18%), those in DE households (11%) and those who were most financially vulnerable (10%).

A few participants in the *Adults' Media Lives* study remarked that the risks associated with digital exclusion for those who have not made the leap to new technology have been magnified by the current crisis. One 76-year-old participant had been using her new-found skills to support similarly aged neighbours who weren't able to access the internet for themselves.

For some, the pandemic has been the catalyst to a step-change in digital access and skills

Several participants in the *Adults' Media Lives* study with limited digital skills (particularly, but not exclusively, older members of the sample) have embraced new technology and become more confident online as a result of the pandemic and the need it has created to find new ways to access services or support networks that are no longer available face-to-face. In particular, they have adopted services such as online shopping, banking and video-calling apps for the first time. Other participants have been helping older or less digitally-literate friends and relatives get online or navigate their way around new online activities.

¹⁷ As a result of the Covid-19 pandemic, the Ofcom Technology Tracker was not able to conduct face-to-face fieldwork in 2021, the method by which previous Technology Tracker surveys have been conducted. Instead, data on internet access was gathered via a CATI (telephone) survey in 2021. The survey was conducted among adults aged 18+ in 2021, and among adults aged 16+ in 2020.

“You're forced to learn and to keep up with what was going on. It was a point of contact, it was important... I was so grateful for WhatsApp, and I was grateful that I could do the banking online.”
Female, 54, Housing Officer, Coventry

“Because I'm over 75 I've got to apply for a [driving] licence every three years... I was able to do that online without any assistance which was quite good... Certainly I'm more comfortable enquiring about things, I'm not so frightened of clicking buttons and making mistakes.” Female, 76, Retired, Edinburgh

“They've actually stepped up quite a bit with the tech, the parents, to be fair... I've actually got them on online banking which is a bit of a coup because my dad is [usually of a mind that] if he hasn't got his passbook it's not happening.” Female, 43, Fundraising Manager, Cardiff

Although their experiences of change had been almost wholly positive, participants nevertheless claimed that they made these changes because they felt that they had to. One of the recurring themes from the *Adults' Media Lives* study has been that when someone has a compelling reason to do something, that's when they're most likely to get new technology or develop new skills.

“It's other people that push me into doing it, I'm still not happy, but I can see that I'm going to have to do it.” Female, 59, Unemployed, London

Among the minority who remain offline, the main reasons for not having access were that the internet is seen as too complicated, not needed or too expensive

Adults who don't use the internet at home – either due to not having home internet access or having access but not using it themselves – gave a variety of reasons for not going online in our Digital Exclusion Survey. The most common reason given was an issue of media literacy; 46% of those offline stated that the internet was “*too complicated*” (46%) – either getting connected to it or using it. Other barriers to access included a lack of interest: 42% said “*it's not for people like me, I don't see the need or I'm not interested*”, or a lack of equipment; 37% said they “*didn't have the right equipment*” or affordability; 36% believed the internet was “*too expensive*” – either due to purchasing the equipment needed or the cost of getting connected.

The majority (60%) of those who did not use the internet at home had asked someone else to do something for them online in the past year. Among these proxy users, the most common reason to ask for help was to buy something (57%).

“*To buy something*” was also the most common reason given by non-internet users when asked if anything would prompt them to go online in the next 12 months (28%). A variety of other reasons were given, including accessing health services (22%), getting in touch with someone (17%), or “*if I had someone to help me or show me how*” (14%). However, a third of non-internet users said that nothing would prompt them to go online in the next 12 months (31%).

Narrow internet users

Narrow internet users were less likely than average to have ever undertaken each of the 20 online activities asked about¹⁸

In our survey, 'narrow' internet users were defined as those ever undertaking between one and ten of the 20 online activities we asked about. This accounted for 32% of internet users. 'Medium' users had ever undertaken 11-15 activities (31% of adult internet users) and 'broad' users 16-20 activities (37% of adult internet users).

Narrow internet users were less likely than average to ever have undertaken each of the 20 online activities; the only online activities that a majority of narrow internet users had done were sending and receiving emails, using chat or messaging sites or apps, using social media sites or apps and online shopping.

Internet users aged 65+, in working age (16-64) DE households or in the most financially vulnerable households were more likely to be narrow users, while those aged 25-44 or in ABC1 households were more likely to be broad users.

Narrow internet users' critical understanding of the online environment was generally lower than average

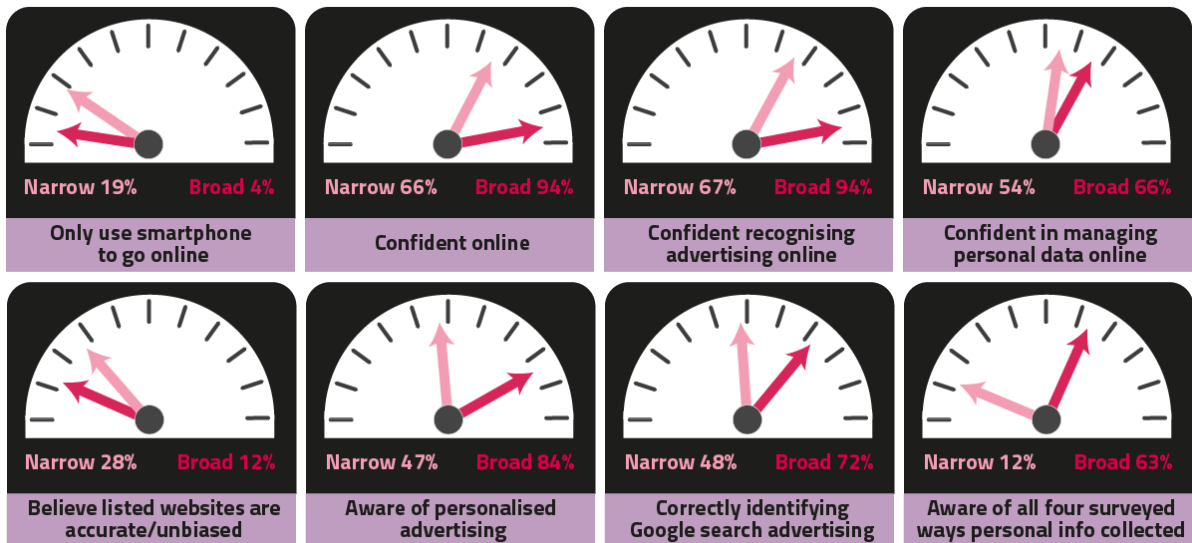
Narrow internet users were less likely than average to say they were confident as an internet user (66% vs. 83%), confident in managing their personal data online (54% vs. 61%) or confident recognising advertising online (67% vs. 84%).

This reduced confidence carried through to lower levels of awareness and understanding of the online environment. Narrow internet users were less likely than average to correctly identify advertising in Google search results (48% vs. 62%) and to be aware of personalised advertising (47% vs. 68%). They were more likely than average to think that if websites are listed by a search engine, they will have accurate and unbiased information (28% vs. 18%). They also had lower levels of awareness of each of the ways in which their personal information can be collected online; only 12% (vs. 40%) were aware of all the four ways we asked about.¹⁰

Conversely, broad internet users were more likely than average to give media-literate responses to each of these questions.

¹⁸ The 20 activities we ask if respondents have ever undertaken online are: make voice or video calls using a VoIP service; have a social media profile; use chat or messaging apps; send/receive emails; pay online for council tax or another local council service; complete a tax return online; look online for public services information on government sites such as gov.uk or HMRC; complete government processes online – such as update Universal Credit, renew a driving licence or passport etc.; online shopping; online banking; pay bills or check bills online; look at job opportunities or apply for a job online; find information for leisure time including cinema, live music, theatre, museums etc.; watch TV programmes/films online; watch short video clips; access news websites or websites about politics or current affairs; listen to live, catch-up or on-demand radio through a website or app; use streamed audio services; sign an online petition or used a campaigning website such as change.org; play games online.

NARROW VS. BROAD INTERNET USERS



Smartphone-only internet users were more likely to be narrow internet users

As well as conducting fewer activities online, narrow internet users were less likely than average to use each device to go online.¹⁹ Accordingly, they were almost twice as likely as the average internet user to only use a smartphone to go online (19%). Conversely, broad users were more likely to use all devices to go online; only 4% were smartphone-only.

In fact, more than half of those who only go online via a smartphone were narrow internet users (56%). This means that a lot of the limitations in confidence or understanding online also applied to smartphone-only internet users. For instance, smartphone-only internet users were less likely than average to feel confident as an internet user (68% vs. 83%), to have ever undertaken 17 of the 20 surveyed online activities (the exceptions being using social media sites or apps, using chat or messaging sites or apps and gaming), to identify advertising in search results (50% selected only the correct response, vs. 62%), and to be aware of each of the ways in which companies can collect their personal information online.

With the smartphone an increasingly popular device for more and more online activities, we have seen a longer-term increase in the proportion of all smartphone users ever using that device to complete a form or an application, and in 2020, 29% were doing this weekly. However, 70% of smartphone users agreed that completing forms and working on documents was more difficult on their smartphone than on a laptop or desktop, and this attitude has not changed much in recent years. Adults aged 55+ were also more likely to strongly agree that it is more difficult to complete forms or to work on documents on a smartphone than it is on a laptop or desktop.

Digital exclusion goes beyond access to the internet. We can see that those internet users who may be more limited in their online use – either due to device access or levels of exploration online – are less likely to be able to navigate around the online environment confidently and knowledgeably.

¹⁹ See [Digital media use](#) section above for details of the devices asked about.