



Adults' Media Lives

Wave 20: 2025

A report for Ofcom
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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 lives.

This annual study consists of filmed interviews with a panel of 20 people who represent a broad cross-section of the UK population. Because we interview the same participants each year, the research allows us to track changes in media behaviour, assess the impact of new devices and services on people's everyday lives, and explore how life experiences change people's needs and shift their attitudes to digital media.

For instance, we see how 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 change in participants' relationship with media. Annex 1 contains eight case studies of long-standing participants' individual media journeys.

To commemorate the twentieth year of the study we also asked participants to reflect on their changing relationship with media over the period of their participation in the study, and their expectations for the future (see Section 5, below).

This year, 16 face-to-face (in-home) and four online interviews were conducted between 7th October and 7th November 2024 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 economic background. More than half of the sample have participated for over 15 years. This year, however, our sample included a new recruit – a 73-year-old retired engineer from rural Warwickshire.

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).
- 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, attitudes to the coverage of major events such as the 2024 Olympic Games and the role of media in helping participants decide who to vote for in the 2024 General Election.

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 others have been more resistant to change; 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](#). 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.

Understanding attitudes is a key objective of this research. Any opinions on public figures or specific platforms in this report are the participants' own, and do not reflect the position of Ofcom or of The Knowledge Agency.

Overview

Key insights from Wave 20 include:

1. Living with technology

In terms of the acquisition and use of media technology, this has largely been a year of consolidation. Some older participants in particular claimed to have spent time this year learning how to get more use out of existing technology and services, in preference to acquiring more.

The use of AI tools such as ChatGPT is becoming more widespread, especially among participants who work in office-based jobs.

Most participants in office-based jobs now have a settled hybrid working schedule, and appreciate the benefits of home working facilitated by media technology. However, there were some misgivings, such as missing the social aspects of the workplace, the risk of work encroaching on home life, and practical difficulties finding a quiet space to work in at home.

Media technology is playing an ever-increasing role in health, fitness and wellbeing, with over half the sample now using devices and apps to monitor their health and/or support them in their fitness goals.

There were numerous examples of the use of apps and websites to save money and/or generate income. This included an increase in buying and selling second hand goods, sometimes as a side business.

2. Content and platforms

The trend towards more online and on-demand viewing continues, driven in part by the prevalence of smart TVs across the sample. This includes an increase in the claimed viewing of public service broadcaster (PSB) channels via their apps and catch-up services.

However, support for the BBC was less strong than in previous waves. This was reflected in attitudes towards the licence fee.

Mr Bates vs the Post Office was cited by numerous participants as an example of public service broadcasting at its best, bringing an important issue to mass attention via an excellent drama.

YouTube is becoming more important and viewed increasingly on smart TV sets, as well as other devices. This was particularly true among men: several now describe YouTube as their main source of viewing, in preference to either traditional TV or streaming services.

Most participants described their social media use as somewhat more limited, careful and targeted this year (although, for younger participants, TikTok appears to be the exception). Some also claimed to be posting and sharing less than before.

No participants had experienced harmful or abusive content directed at them personally in the past year, but many commented that graphic and distressing images and videos were being served up to them regularly on social media, particularly in relation to the conflicts in Ukraine and the Middle East.

3. Personal data, privacy and security

Attitudes towards personal data and privacy are largely unchanged this year. Most participants consider that giving out at least some personal data (e.g. accepting cookies) is a “necessary evil” to being able to function in a world where more and more services are delivered online and/or via apps.

Participants are aware of being targeted frequently by scam emails and calls, but feel largely confident about spotting them (e.g. by scrutinising the email address of the sender of a suspicious email).

4. News

Attitudes towards news have become more polarised, and consumption habits more fragmented, over the past year. This is at least in part due to widely varying levels of interest in (and different opinions on) coverage of the conflicts in Ukraine and the Middle East.

BBC News (across TV, radio and online) was still the most widely consumed news service across the sample, and remains core to the news diet of some participants. However, participants mentioned a diverse list of news sources they follow across social media and YouTube, as well as TV.

Many participants from lower-income households, and some of those from minority ethnic groups felt that their views and experiences are not represented in the mainstream news media, and were often critical of (and sometimes hostile towards) the BBC.

Participants did not think media coverage of the General Election influenced their voting choices, and many were critical of coverage of the election campaign, in particular the emphasis on adversarial discussion and debate.

5. Reflections on 20 years of Adults’ Media Lives

For many participants (especially those who have been in the study longest), the developments in media technology and services since 2005 have been amazing, impressive and occasionally frightening.

Some who were slow to adopt new technology are now glad that they did so, and have largely positive emotions about the benefits. Others are still wary and continue to evolve slowly and reluctantly.

Some of the early adopters of new technology and services in earlier years of the study have become more considered and cautious over time. This is partly a result of changed priorities in their lives, partly because the perceived incremental benefits of (e.g.) new generations of smartphones are seen as marginal.

Perceived benefits of media evolution include choice of content and services, convenience of access, improved communication with friends and family, personalisation of media choices, access to more diverse interest-specific content, and feeling better informed about what is going on in the world (if they want to be).









Perceived downsides include the challenge of keeping up with technology, exposure to online harm and scams, lack of privacy, concerns about the impact of their digital footprint, anxiety caused by social media, and the fragmentation of family life (e.g. less shared viewing).

Smartphones (specifically the iPhone) were the technological development most widely credited with having had the biggest impact on their lives.




Participants felt that the future was difficult to predict with confidence. Most believed that the impact of AI would be significant over the short-to-medium term, though they weren't necessarily sure what this impact would be, and whether it constitutes a threat or an opportunity (or both!).

Wave 20 participant profiles

NB: Although biographical details are accurate, for data protection reasons pseudonyms and AI-generated avatars are used to label participants.

	Hazeem (4 years in study)	<i>Hazeem is a 20-year-old university student and currently lives in his parents' house in Oldham. He is a technology enthusiast who enjoys having the latest of everything.</i>
	Brigit (6 years in study)	<i>Brigit is a 24-year-old nurse who shares a house in Belfast with her fiancé. She has a hectic work schedule but still manages to be a prolific consumer of social media in her downtime.</i>
	Chloe (11 years in study)	<i>Chloe is a 24-year-old sports coach who lives in her Mum's house in Warwickshire. She enjoys watching streaming services, and uses the internet extensively to plan her travels abroad.</i>
	Tim (12 years in study)	<i>Tim, aged 26, shares a house in Leeds with his partner, and works in a management role for an online betting company. He is a passionate football fan and devotes much of his spare time to watching sport.</i>
	Robert (11 years in study)	<i>Robert is a 28-year-old tutor, who shares a flat in London with his partner. He spends much of his day in front of a screen for work, so likes to relax by listening to music and podcasts.</i>
	Jenny (17 years in study)	<i>Jenny is a 31-year-old solicitor, who shares a house with her partner in Edinburgh. She has always been an avid social media user, and currently devotes a lot of her spare time to browsing TikTok.</i>
	Dean (19 years in study)	<i>Dean (35) works as a carer and lives alone in a flat in Essex, with occasional visits from his teenage daughter. He is sceptical about the mainstream media, and prefers to stream content from alternative sources, especially YouTube.</i>
	Julia (19 years in study)	<i>Julia is a 36-year-old doctor. She lives in a house in London with her husband and young daughter. Social media has played a prominent role in Julia's life, but is somewhat less important now she is a busy working mother.</i>

	John (2 years in study)	<i>John is a 38-year-old banking analyst who shares a flat in Leeds with a friend. He also has part-time custody of a teenage daughter. He loves sport and cars, and devotes much of his media attention to content about these topics.</i>
	Dai (19 years in study)	<i>Dai is a 45-year-old IT Manager from Cardiff, where he shares a house with his wife and two children. He loves to keep in touch with professional peers on social media, and is an avid consumer of news and sport (especially rugby).</i>
	Suki (4 years in study)	<i>Suki is a 47-year-old PA who lives with her two sons in a house in Woking. As a single parent, much of her time outside work is spent supporting her children, but she enjoys browsing social media and watching TV drama.</i>
	Denise (19 years in study)	<i>Denise, 47, works as a charity fundraising manager. She lives in a house in Cardiff, married with one teenage daughter. She has always had a strong interest in media technology, and considers herself to be the "family technician".</i>
	Mick (20 years in study)	<i>Mick is a 50-year old engineer who lives in rural Derbyshire with his wife and two adult children. He is devoted to his phone, and uses it both to view content and as a means of keeping in touch with home when travelling for work.</i>
	Sheila (20 years in study)	<i>Sheila, 51, shares a house in rural Somerset with two adult sons, for whom she works as a carer. They spend much of their media life online, viewing alternative content and conspiracy theories.</i>
	Sally (20 years in study)	<i>Sally is a 58-year-old part-time housing officer and grandmother. She shares a house in Coventry with her husband. She is a traditional TV viewer who loves drama series, but has recently developed a passion for box sets.</i>
	Peter (17 years in study)	<i>Peter, 63, is an unemployed alarm fitter and grandfather. He shares a house in Belfast with his wife. Paul suffers from ill health and money is tight. He would love to have Sky Sports, but is limited to free-to-air coverage and YouTube highlights.</i>
	Elizabeth (19 years in study)	<i>Elizabeth, 63, is unable to work for health reasons. She lives alone in a flat in London, but sometimes takes in lodgers. She generally has a cautious approach to media technology, but accesses a lot of health-related content on YouTube.</i>

	Donald (19 years in study)	<i>Donald, 70, is a retired police officer and grandfather, who still works part-time. He and his wife share a house in Middlesex. Though not an early adopter, Donald has embraced online working, and uses an iPad to watch TV.</i>
	Geoff (1 year in study)	<i>Geoff is a 73-year-old retired engineer from Warwickshire, where he shares a house with his wife. Geoff has a strong interest in news, and follows a diverse range of sources each day. He also enjoys the major dramas on ITV and BBC.</i>
	Cathy (17 years in study)	<i>Cathy, a retired office worker, is 80 and lives alone in a house in Edinburgh. Digital technology does not play an important role in her life (she prefers the radio!), but she has learnt to use the internet via both a laptop and smartphone.</i>



1. Living with media technology

1.1 In terms of the acquisition and use of media technology, this has largely been a year of consolidation

Historically, participants in the study have been most likely to acquire new media hardware or services either as a result of a change in their lifestyle or domestic circumstances (e.g. moving home, starting a family), or in response to the launch of a compelling new device or service.

Across the sample as a whole, relatively few participants had bought new media technology this year (although a few had invested in smart technology for the home, such as doorbells and thermostats), and there had been few upgrades to (e.g.) mobile devices. This partly reflects relative stability in most participants' lives, as well as a residual degree of financial caution in response to the cost-of-living crisis.

There were some exceptions, but these were often driven by work requirements, the pursuit of a particular passion, or their children (whose needs are often put first).

My little one keeps using my iPad because he doesn't like his one any more, because he doesn't think it's fast enough. So he's saying "Can I have an iPad?" now.

Suki, 47

*You feel bad. You don't want all her new friends to have new stuff...
I'd go without as long as she's got what she needs.*

Dean, 35

In some cases, participants had actually downgraded their technology, for example selling devices they weren't using or replacing over-specced devices with ones which were simpler to use.

*The dog ate my AirPods. I then realised that I didn't really need them,
and I bought some replacement AirPods for £20 off Amazon,
and I've actually preferred them since.*

Tim, 26

*I bought a more basic phone, which I absolutely love. I looked at the
reviews, as I always do, and then I realised when someone said that
their granny could work it, I thought "That's the phone for me".*

Elizabeth, 63

Similarly, some had cancelled subscriptions to some of their services, including two who had got rid of their pay TV packages in favour of exclusively using streaming apps on their smart TVs.

*We changed our BT account from being TV, landline and broadband to
just being broadband.*

Dai, 45

*The Sky box is away. The wife decided it wasn't worth the money.
Most of the stuff now is on iPlayer or - you know - all them [ITVX, etc.].*

Peter, 63

Some older participants in particular claimed to have spent time this year learning how to get more use out of technology they already own, rather than acquiring anything new.

This year we haven't bought any new devices. However, we have now started homing in to what's available on the devices. Lots of things on the mobile phones that we would never [have used before]... we'd probably be too frightened to even press the icon on the button.

Sally, 58

I've been using that [smart speaker] an awful lot for music and asking questions and things like that. I just think that's wonderful. How quickly it comes back with an answer. And there's not somebody sitting in an office looking at books.

Cathy, 80

1.2 The use of AI tools is becoming more widespread

In last year's Wave 19 for the first time we explored participants' understanding and experience of AI tools. This year there had been a marked upturn in the claimed use of such tools, particularly, for those working in office-based jobs. Many of these now regularly use apps like ChatGPT and Microsoft Copilot in work, and sometimes outside work as well. On the whole, AI tools were being used for limited, specific tasks, with an emphasis on labour-saving. Users considered them helpful, but not revolutionary.

It's the Copilot on Microsoft that's been installed on all of our work computers and it's good with the mundane tasks. It's not really good with the creative tasks.

John, 38

I'm a recruiting manager in work as well. And you can tell the people that have used some sort of AI to complete a question, especially when you get to the interview stage and the face-to-face version of their answer is slightly less detailed, shall we say.

Denise, 47

A few participants were also using ChatGPT in their personal life (e.g. for drafting documents, helping with writing style, or as an intelligent search engine).

I had to write an application for a course. It wasn't like a competitive thing. It wasn't an exam. But I was a bit stumped on how to start it. And so I went to ChatGPT and said "Write an application for a management course"... and then it gave me a few ideas to pin my answer to.

Julia, 36

I went on to ChatGPT... I put in a few places I wanted to go to in Thailand and said "Can you plan me a trip?". And it did.

Chloe, 24

There was some confusion about how ethically acceptable it is to use AI tools in education. One student uses ChatGPT to proofread his coursework, but he is suspicious that some of his fellow students are using it to write assignments in their entirety.

Another participant's son has been using AI to write his homework, but she is not sure whether or not this is allowed by the school (her son assures her that it is!). She feels conflicted as to whether to be angry about his laziness, or pleased that he is learning how to make technology do the work for him (which may be a more valuable skill in the long term).

He does his homework on AI a lot of the time. He'll just ask for an essay and there it is. I think "Wow... that's really not good!"... He gets away with it. He changes a few words. They're really clever, the way they use it... I say "That's not going to teach you anything", but he says "No, it's fine".

Suki, 47

Several participants expressed their frustration at the deployment of AI "chatbots" on websites; these were considered to be largely unhelpful.

You're communicating with organisations, but generally you're communicating with bots. A lot of businesses seem to use that sort of technology and have done away with a layer of people. When you spoke to a company, you used to speak to a person who was genuinely able to sort it out... It's the human element that seems to have broken down.

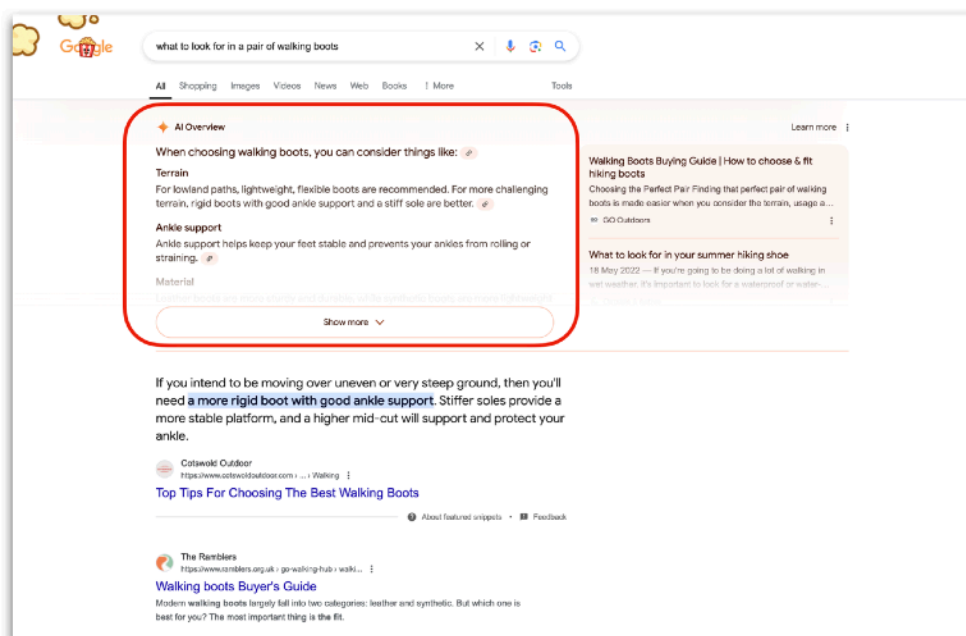
Donald, 70

You can just go round in an Orwellian nightmare with AI... The questions that you want to ask aren't even in there, you know, for you to ask the bot... The conversation goes so far, but no further... you just end up back at the beginning again.

Elizabeth, 63

We prompted for awareness and use of AI summaries in Google search results and Amazon product reviews, using sample screen captures for each where required.

1. Example of Google search results with AI summary (highlighted in red box)¹



Many participants were already aware of the AI summaries presented at the top of Google search results. By and large, they considered these to be helpful, although opinions differed to some extent as to how much trust to place in them.

I kind of read it. I don't rely on it. I just kind of think, "Oh, that's quite useful information. Has that answered it?" If it's something really high level, like basic.

Jenny, 31

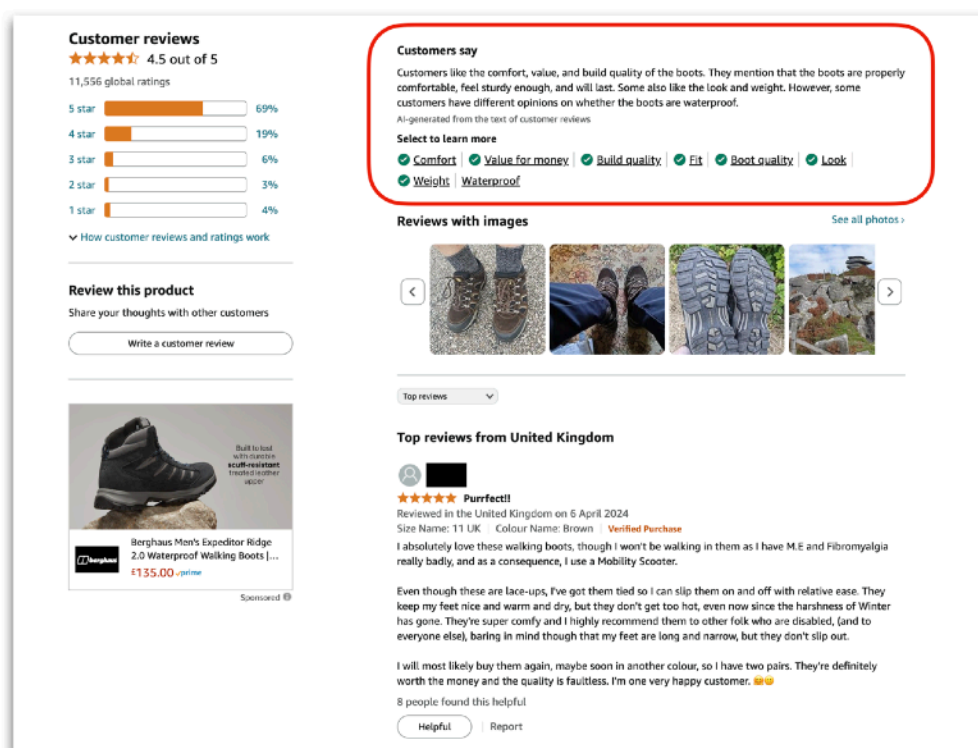
If I'm Googling something, I'd rather get the information from a reputable source.

Julia, 36

I think the important thing is that they've actually acknowledged that it is AI-generated.

Donald, 70

¹ Excerpt from Google search results for "What to look for in a pair of walking boots" as of 25/09/24. Other sites referenced in the example shown were Go Outdoors ([gooutdoors.co.uk](https://www.gooutdoors.co.uk)), Cotswold Outdoor ([cotswoldoutdoor.com](https://www.cotswoldoutdoor.com)) and Ramblers Association UK ([ramblers.org.uk](https://www.ramblers.org.uk)).



2. Example of Amazon Prime product reviews with AI summary (highlighted in red box)²

The AI summaries of online reviews were considered less helpful (and potentially less trustworthy).

The Amazon one is fine but... I would rather read a five star review and a three star review than just a sort of AI summary.

Robert, 28

When we asked participants at the end of the interview how they saw the future of media technology, most felt that developments in AI were likely to have the biggest impact in the coming years – for better or worse.

I think the progress will continue. I also think... there will probably be new jobs that arise from it... That's why I think I'm looking forward to my granddaughter's time, because it's they who will take it forward... the next generation.

Donald, 70

² Excerpt from Amazon Prime reviews for Karrimor Men's Bodmin IV Weathertite High Rise Hiking Boots (best selling walking boots on Amazon Prime as of 25/09/24). <https://www.amazon.co.uk/Karrimor-Bodmin-Weathertite-Hiking-Shoes/dp/B00LIY4YQ>. Name of reviewer redacted.

Those most likely to be concerned about the potential negative consequences of AI were those who had little or no experience of using it. In fact, many participants expressed an interest in learning more about AI, but they didn't necessarily know where to go for help.

You know, it's made me think, I do need to get up with it a little bit more, but I wouldn't have a clue where to start.

Suki, 47

1.3 Smart technology is slowly becoming more widespread in the sample, with the main growth this year being in smart doorbells

Up to now, smart speakers have been by far the most widely-owned smart technology across our sample. This year, there were few changes in terms of ownership or usage of smart speakers (although one older participant has started to use hers much more – largely because of an eye operation which has limited her ability to look at a screen).

To begin with I couldn't watch television at all. I couldn't drive. I was kind of confined... so I had more music on than television.

Cathy, 80

However, several participants have installed smart doorbells in the past year, and others are considering doing so, primarily for the security benefits.

I want to get a Ring doorbell... That's definitely something that I want because we're on the ground floor of the tenements... and the buzzer doesn't work to get in. So we have to get a work-around. And I think that's the best way to do it... Most of my friends have them.

Jenny, 31

Where it has come into its own... A month ago, the couple next door, people came up on to their driveway to try to steal their car. Our doorbell picked up footage. So in that way, it was quite good... The images weren't great. But it's a deterrent, I think... If I'm here on my own at night and somebody rings the doorbell, I don't go to the front door. I answer it on my phone.

Sally, 58

In one multi-generation household, this has created an unforeseen privacy issue, with older family members learning more about younger members' comings and goings than the latter would like.

I said we should get one [smart doorbell], but then my sister was worried that some of the family members might kind of abuse it, like start saying "Why did this person come home late, or go out late?"... that sort of thing. So my brother ordered it but he changed a lot of the settings, so you can't really do that. The only notification we get is if someone clicks the button.

Hazeem, 20

Most were reluctant to pay a monthly subscription to be able to access the full feature set of their smart doorbell, and this was a barrier to purchase for some.

I've thought about the Ring doorbell. The only problem is that you have to subscribe to it. You have to pay a monthly fee for it. So I did look on eBay at these other manufacturers [from whom] you can buy, where you don't have to subscribe to them, and you can still get the video on your phone.

Mick, 50

Several households now have smart thermostats, with mostly positive experiences.

What we've got is the Hive system, so we can actually use that to put the electricity and gas on. And I find that very useful... The other night we were coming home and felt a little bit cold. So we planned ahead a little bit and put the gas on for an hour prior to our arrival.

Donald, 70

1.4 Participants are now managing more of their daily lives through apps, and are required to use more apps to do so

Another area the study has explored in detail over the past few years is participants' experiences and issues accessing services like banking and ticketing that are increasingly going paperless.

This year participants described themselves managing more and more of their daily life through apps. More now bank online, even some of those who were initially reluctant to do so. There were numerous examples this year of participants using banking apps to micro-manage their finances more actively than before (especially those with accounts with newer online-only banks such as Monzo and Revolut).

Most people obviously have a savings account with their bank, but I've actually been using Revolut to save. I just find it better; whenever I want I can move my money about.

Brigit, 24

I've been saving for two years for this travelling trip, and putting it all into a pot in my Monzo labeled "For travelling".

Chloe, 24

I get a little bit out of my savings, put it in my current account, like £50 a day or whatever, try and use hardly any of it and then put it back in my savings. Then the next day, I do the same thing... I try and save up as much as I can and put it in a pot for a holiday at the end of the month.

Dean, 35

However a few older participants are still strongly resistant to any kind of change to their banking arrangements.

I have a bank book that my mother opened for me when I was born... And every time I go to the bank, they say "Let's change that for a card", and I say "I don't want a card, I want my bank book"... It tells me exactly how much I've got in the bank... If I've got a card, I haven't a clue.

Cathy, 80

Going paperless for tickets, etc. is now seen by most participants as more convenient, and several have switched over from print-outs to paperless in the past year. However, this can still be a source of stress, especially for those with older or less reliable smartphones.

A couple of times this year I've flown and I just get all my tickets through the app and add them to Apple Wallet, and I'll even get everyone else's if I check in for everyone, send them round to the different people.

Dai, 45

Once I nearly got caught out but, thankfully, the people at Paddington train station, because I had the paper print-out, were able to actually issue me with a ticket. So that was lucky.

Denise, 47

In Italy my phone... I don't know whether it was the heat... it just kept dying at random times. So we had to make sure that everything was put onto [partner's] phone. Then if mine died, we'd still be able to use our ticket.

Chloe, 24

Although the apps mostly work well, some participants expressed frustration at the apparent need to install dedicated apps for every task (e.g. multiple parking apps, event-specific apps), especially when these apps require users to pass on large amounts of personal data (which may then be used for marketing purposes).

Before I wouldn't have downloaded an app. But now it seems that is the requirement. And so I've noticed that my phone has got a load more apps than it used to.

Suki, 47

Well, the only ones I really am forced to use are parking apps because I can't park any more and pay with a credit card or money. But that's the real world, isn't it? That's the way the world's going.

Geoff, 73

A lot of these promotional companies like Ticketmaster, Live Nation, they no longer just email you the ticket. You have to download the app to download the barcode. I'm never going to use this app again for the rest of the year. And the first thing they'll [suggest] is "Turn on post notifications for updates".

John, 38

1.5 Some participants expressed growing ambivalence towards home working

During the COVID-19 pandemic in 2020, many participants with office-based jobs switched to home working, and makeshift offices were established in their spare rooms, bedrooms, kitchens and conservatories. In some cases they acquired new technology to allow them to work effectively from home.

It quickly became apparent to most that there were benefits to home working, particularly around flexibility of working hours and a reduction in time spent travelling to and from work. However, participants also voiced drawbacks in relation to the potentially harmful effect of excessive screen time and the lack of real social interaction with work colleagues.

In the following years, these participants have all returned to their offices for at least part of their working week, although the amount of time each spends in the office varies. Most now have a settled hybrid working schedule, and largely appreciate the benefits in terms of flexibility, productivity and efficiency. However, in Wave 20, several were more vocal than before about their reservations.

Finding a space to work in at home is not always easy, especially if more than one family member is required to do so. This is impacting participants' choice of how to configure their homes.

We're now sharing an office... We've got the Time Tree [app] so [partner] will book it in for, say, 2.00 to 3.00 pm... But then if I need it at the same time, we just have to decide who has it. It's not ideal at the minute. So the long term plan is for the second bedroom, that she wanted to be a dressing room, to partially become my room and office... Because, at the minute, it's just too chaotic.

Tim, 26

One single parent in particular described finding working from home lonely, as she is looking after her kids full-time outside office hours. She would like to spend more time in the office for some much-needed adult social interaction, but this is proving difficult.

I'm trying to go in once a week just to have a break from the house now, because I've got to that point where being at home all the time is a bit boring... There's no clearing up, washing up, tidying up around you. You're just at work.

Suki, 47

1.6 Media technology is playing an ever-increasing role in health, fitness and wellbeing

Over half the sample now use some combination of smartphones, smart watches and apps to monitor their health and/or support them in their fitness goals.

Counting steps was the most widespread application mentioned, but there were numerous examples of the use of hardware and apps to support more specific activities (e.g. running/cycling watches and Strava).

It's surprising, you know, if you're on 9,700 and something you're like "I'm not going to bed before I get to 10,000... I need to get to 10,000".

Denise, 47

I hired a coach and she programmes all of my workouts and they just get uploaded onto this app so I can see what I have to do.

Chloe, 24

I've got a turbo trainer in the shed which, with my iPad, runs an application called Rouvy. It just allows me to follow routes and, you know, do certain power training with different levels of resistance.

Dai, 45

Two participants described themselves using apps in different ways to support their mental health.

I use something called the Headspace app as well, which is sort of about bite-sized learning more than anything, but taking time out.

Denise, 47

Do you know the wee colouring apps you can get on the iPad? It's just like colour-by-numbers. I like to do one of them when I come home from work, because it just helps me forget about work and then gets me ready for getting ready for bed.

Brigit, 24

Most participants believe that the internet can be a useful source of health and fitness-related information, but there was a wide disparity in the level of trust placed in such information, and the strategies they use to evaluate it.

A few (mainly older) participants avoid looking at online information altogether, or only trust official sites, such as the NHS. Most, however, think that the internet (including YouTube videos and podcasts, as well as websites) can be a useful source, especially where their information needs are specific or specialist (e.g. particular types of fitness training, specific illnesses or medical procedures).

I was looking [on YouTube] at the slimming jab, the skinny jab, because I did toy with the idea because of my blood pressure.

Elizabeth, 63

Participants described a variety of factors they use to assess the credibility of user-generated or independently-produced content about health and fitness. For more serious health-related content, some claimed to pay attention to the (stated) qualifications of the content creator (e.g. if they present themselves as a qualified doctor or academic). However, when it comes to diet and fitness-oriented content, they are just as likely to make assumptions about the validity of the content based on their own, apparently superficial, judgement about the credibility of the presenter (for example how fit and healthy they appear to be).

These guys have all got good physiques. I think it was my Mum who said “Would you rather take advice on the stock market from someone in a suit or someone begging for money on the street?”. The person who has the appearance is more likely to have that knowledge.

John, 38

In other cases, participants spoke about taking the opinions of others into account before forming their own view. This included written comments from other viewers or (in one case) whether or not the advice given was backed up by a conversation with their GP.

I started taking vitamin D3, to help with my energy levels... and I'd seen that on the High Performance podcast. My GP said “Yeah, that's fine. That makes sense.” So normally I would just verify it with them as well to check that it's not absolute nonsense.

Tim, 26

Several participants (including two suffering from serious health conditions) expressed frustration with the way in which technology is being used to deliver NHS services (e.g. difficulties trying to book GP appointments through the NHS app), but the issues appear to be with the level of service offered by the NHS rather than the technology per se.

I don't know whether it's just my particular GP., but you can't get through on the phone. The app... whenever you finally get into it, it just says there are no appointments.

Brigit, 24

1.7 Participants were more conscious this year of rises in the cost of media services

In Waves 18 and 19 we reported the impact of the cost-of-living crisis on our sample.

Although only a few participants claimed that they had been seriously affected, there was widespread anxiety, and most had taken measures to save energy as well as looking for other ways of cutting back on their spending. This included delaying non-urgent upgrades to phones and other devices, although their expenditure on media services was largely unaffected.

The crisis continues to have an effect on some participants – roughly a quarter (including the three single parents in the sample) now claim that they are struggling financially.

This year most participants had noticed either significant increases in the cost of their media services, and/or changes to the nature of the service provided (e.g. the introduction of ads on Amazon Prime, or limits to the number of users able to access a single Netflix account).

My Virgin... that came up for renewal... end of August, beginning of September. It's virtually doubled.

Mick, 50

Netflix has gone up. Amazon Prime has also gone up. I think Amazon have started this thing where even though you pay, you still get ads anyway.

John, 38

You know, you pay enough for those streaming services anyway. I appreciate they've got to make money, but it just makes the viewing a little bit more disjointed because you can't fast forward through them, obviously.

Denise, 47

Whilst participants hadn't cancelled streaming services because of these changes, they hadn't been persuaded to pay more either. For now, they have chosen to put up with the adverts, or not to share their account with friends and family.

Several participants had switched broadband supplier (or considered doing so) this year – more so than we would typically witness from wave to wave. This appeared to have been driven primarily by local fibre broadband providers selling aggressively door-to-door.

With broadband, we've also switched. I think it's called YouFibre. Someone knocked on the door. I think when you search for it online and you put your postcode and address in, it basically triggers someone to come to your door.

Hazeem, 20

I've had two people [from] just that internet provider come knocking... they really want to take over this whole area. The guy said to me, "I'm going to call you in three months.... I can totally outdo what you're doing."

Suki, 47

1.8 There were numerous examples of the use of apps and websites to save money and/or generate income

Although media services are a growing cost, the internet can also help to save money – or even generate income. We heard numerous examples of participants using apps and websites to do this – a small increase compared to previous years.

In line with previous waves, participants mentioned using price comparison sites, particularly for insurance renewals (another area where prices were felt to have increased significantly).

I think it's always worth looking at the various alternate sites, which I do, whether it's for house contents insurance or car insurance.

Donald, 70

For any of the energy stuff that we do. Same for, internet browsing. I think we use Uswitch, Compare the Market and Money Supermarket as well. The same for the car. Yeah, anything I'm doing with the car.

Suki, 47

Several mentioned having supermarket loyalty accounts linked to their smartphones, either via apps and/or having the cards stored in Apple Wallet. Some had misgivings about allowing retailers to track their behaviour but felt that they couldn't afford not to.

I go in and scan my Clubcard and it feels like a little win against the Man, but the irony of it is actually, you know, it's not a win against the Man. But when you see it, when you scan your Clubcard and it shows how much you've saved, I think "Yeah, they can take all my data, they can track everything. But I've saved £1.20 today. So who's the real winner?"

Jenny, 31

One participant (who has a history of serious financial problems) mentioned specifically shopping on Amazon because it offers the option (on some products) to pay in instalments. She is aware that this means that she doesn't necessarily get the best price, or indeed the optimal product for her needs, but in terms of the flexibility of payment terms, it's the best option for her.

Literally, I go on to Amazon and see what they've got, and I'll do it over a payment plan because that's all I can do.

Sheila, 51

She is also one of a growing number of participants using apps and websites to buy and sell second-hand goods. She has created a small side business buying goods from a local auction house and selling them on eBay. Another has started "flipping" clothes on Vinted.

There's an auction house here and I've been buying bits from it for like a pound, £5, £12, depending on what it is. And I've made £300 so far.

Sheila, 51

The other day I bought two tracksuits, like Adidas tracksuit things for £8 [on Vinted], which is really good. I took them to the launderette, washed them, brought them back and put them both on for £20 and sold them both for £20.

Dean, 35

I think I've earned nearly £500 from Vinted from selling clothes, which I thought was pretty good because a lot of the stuff that I'm selling on there was stuff that I was never going to wear again.

Brigit, 24

1.9 More participants in this wave described themselves using technology in creative ways, but this is still a minority pursuit

Examples of participants using technology in creative ways – making videos, editing photos, building websites, etc. – have been few and far between over the years.

However, this year there was a significant increase in this area, especially in the claimed use of Canva to create invitations, cards, etc. by three women in the sample. Another described herself as an avid user of family photos to create gifts. In both cases the extent of the creativity involved seems to be limited to adapting templates.

Things like Canva... I'm going to try and make my own stationery for the wedding... Yes to save money but... I like to be creative and do things like that, so I get enjoyment out of it as well.

Brigit, 24

I created all of Dad's funeral stuff on Canva. We had it through work... It did take me a while and it was quite fiddly... Once you get the hang of it, it is quite simple, but it just takes a while.

Chloe, 24

So we've done a cushion for my Mother-in-Law for her birthday, with all the kids on it, which she loved. It was their golden wedding anniversary. So I did a bit of a montage of all their old photos... I've also got all of Mum and Dad's old cine films put onto DVD for them recently as well, which they loved... Key rings, fridge magnets, all that jazz.

Denise, 47

No-one in the sample is currently interested in producing videos or podcasts, despite the increase in recent waves in participants consuming such content, but two men are writing books.

I'm writing my own book. I'm writing my life history at the moment. So, I've got to manipulate images and layouts and everything for that.

Geoff, 73

The novel I'm writing, I'm writing it on the iPad, which people always look at me aghast when I tell them this.

Robert, 28

There has been very little use so far by participants of generative AI tools to produce images or video, but one expressed a strong interest in learning how to do so.

There is this course around, like, visual AI that I'm considering going on to be able to revamp our [work] meetings... make them more interactive... You have that kind of light bulb moment: "Hang on a minute. We could actually use AI as well, in a better way."

Tim, 26

1.10 Fewer participants claimed to be gaming this year, and those who play online games generally do not interact with strangers

The incidence of gamers in our sample (beyond the occasional use of game apps on participants' smartphones) is relatively small so any insights should be treated with caution. Nevertheless, the five youngest men in the sample all own consoles and all have gamed to varying degrees in the past.

Three of these claimed to be gaming less this year, partly due to other demands on their time, partly due to a loss of interest.

So I think last year I spent a lot of time on PlayStation. Since I've been back from my holiday, I think I've been on it once, which a lot of my friends are quite upset about... The new Call of Duty just came out and I'm not even playing that, even though we all bought it.

Hazeem, 20

One: I don't want to do it as much. Two: because of the dog. And three: because there's just less time in the day, I suppose.

Tim, 26

Claimed interaction with other people when playing online was limited to real-world friends. Indeed, one participant described gaming specifically as a social activity which allows him to spend time with his friends.

You can add your friends and stuff. I've got no friends, if you know what I mean. Everyone I have on there... just random people. You don't speak to them. You can't speak to them, even if you want to, because it's pretty much a child's game... easy going.

Dean, 35

We all do it to stay in contact with each other now, because I think, as you get older, you all have jobs, you all have responsibilities. You don't have as much time as when you were in school or college or whatever to spend together. So now we kind of treat it as a bi-weekly catch-up.

Tim, 26



2. Content and platforms

2.1 The trend towards more online and on-demand viewing continues

The long-term trend we've reported in previous years towards increased online and on-demand viewing continued in Wave 20. This has been accelerated by the prevalence of connected devices across the sample, including smart TVs as well as viewing on smartphones, tablets and (in one case this year) a projector.

*We just have a smart TV that has all the apps...
Netflix... Apple TV, Prime, stuff like that.*

Tim, 26

*I don't think I ever click TV guide on the telly. I go straight to apps and
go on Netflix or straight to catch-up TV and watch a series that I've
recorded.*

Chloe, 24

Those participants who had got rid of their pay TV service this year (see Section 1.1, above) formed part of this change, but even some of the most traditional media users in the sample spoke of a shift in their behaviour.

We tend to watch a lot of stuff on catch up now. I didn't used to, but, you know, we're going over to watching not so much on live TV or recording like we used to.

Geoff, 73

I can catch up and all that. I can do that. And I've got Netflix because [granddaughter] likes the films.

Cathy, 80

As part of this evolution, participants claimed to be using the on-demand services of BBC, ITV, Channel 4 and Channel 5 more than previously. The bulk of this viewing is on-demand, although some do also watch iPlayer, ITVX, etc. live, especially during daytime.

I rarely watch normal TV, I'm always on either Netflix or BBC iPlayer.

Suki, 47

Mainly around tea-time we watch [ITVX]... 3.00 Lingo, 4.00 Tipping Point and then The Chase, which is 5.00. Then at 6.00 our news comes on, the local news, for half an hour.

Peter, 63

Participants described a greater degree of flexibility and personalisation in their viewing patterns these days. One by-product of this appears to be a decline in shared viewing. There is less family viewing taking place in the relevant households in our sample, and several participants (of different ages) who live with a partner described sitting with them in the evening but each watching different content on separate devices.

We try on a Saturday. I'll try and put film on. Not that anyone watches it, but we try. It's usually me and the little one. And then my son's on his phone.

Suki, 47

Since last time I've started to watch more on my phone... live sport. Like I say we've downsized, and it works better where I can still spend time with [girlfriend], obviously, and have the game on in the background, for example, if Liverpool are playing.

Tim, 26

We've actually got different iPads and we look at different things. And if we want to watch a TV programme... we do it through that. [Wife] sits on that settee and I sit here.

Donald, 70

2.2 Attitudes towards subscription streaming services are evolving

Most participants continue to subscribe to a number of streaming services. Netflix and Amazon Prime are still the most popular. However, some participants claimed to have become more savvy about opting in and out of subscription-based services on a month-by-month basis depending on what specific content they want to watch, or making the most of free trials before cancelling.

We had Now TV. When the last series of Succession came out, I think we got it specifically to watch that. Then we cancelled it.

Julia, 36

Some voiced frustration at the array of different subscriptions required for all the content they want to have access to – especially with regards to sport. The cumulative cost of these was used by one participant in particular as justification for accessing them via unofficial sources³.

Just to watch the sports, it's £180 a month, and I'm paying £100 a year to watch everything. If anyone has the opportunity to get that, they do, because the price is nowhere even close.

Anonymous

Anecdotal evidence from several interviews suggested that the use of dongles sold online or at car boot sales, and able to access a range of pay TV services at a fraction of the cost of subscriptions to the official sources, has become more widespread.

³ 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.

2.3 Attitudes to the BBC and the licence fee were less positive this year

Attitudes to the BBC and other public service broadcasters in this study tend to fluctuate from year to year, based partly on what content they have broadcast and partly on media coverage of the broadcasters themselves (especially the BBC). For example, in recent waves, the perceived quality of PSB coverage of the death and funeral of Queen Elizabeth II and the Coronation of King Charles III had a positive effect on perceptions.

This year, however, negative publicity around *Strictly Come Dancing* and (especially) Huw Edwards had a negative impact on perceptions of the BBC as an organisation.

The BBC used to be up there somewhere, and it's a shame that it's not any more... I think this Huw Edwards business put a lot of doubt in people's minds.

Cathy, 80

Limited engagement (for most participants) with coverage of the Olympics and the General Election (see Section 4.3, below) may have further limited the potential for participants to see the role of the BBC and other PSB channels as distinctive and valuable this year.

I should probably have an opinion, but I feel quite indifferent. It doesn't make that much of an impact on my life, so I don't have much of a view on it.

Jenny, 31

Fewer participants expressed support for the BBC than in previous years, and this is reflected in attitudes towards the licence fee. No more have stopped paying for a TV licence, but several now claim to do so reluctantly, and only for fear of prosecution.

I renewed it the other week, because it came up. But I did hum and haw.

Donald, 70

We got that final written warning letter where they threaten to turn up at your house, or whatever it is. And I've seen a few TikToks of how that goes.

Tim, 26

*If they came knocking at the door, what would I do?
"I don't watch BBC." "But it's on your TV."*

Peter, 63

Nevertheless, it is worth noting that most participants continue to consume PSB content, and there was an increase this year in those claiming to use the catch-up services of Channel 4 and Channel 5, as well as ITVX and BBC iPlayer (see Section 2.1, above). BBC News also continues to form a core part of the news diet of many participants (see section 4.2, below).

Mr Bates vs the Post Office (ITV1 and ITVX) was cited by numerous participants as a good example of broadcasting fulfilling a public purpose, bringing an important issue to mass attention via an excellent drama. One participant commented that the fact that the drama was produced by a major public service broadcaster like ITV seemed to give it added credibility compared to “real life” dramas on streaming platforms, where the producers might be more likely to take liberties with the source material.

I watched Mr Bates vs The Post Office. I thought that was a brilliant series.

Geoff, 73

We were like “Get it streamed. What button do I press?” Without doubt in my mind, putting it onto ITV was the best thing that they could have done.

Sally, 58

2.4 There were no major changes in attitudes towards radio and podcasts this year

Claimed levels of radio listening continue to be modest. Among those who do listen, most of their claimed listening is either in the car or (less often) via smart speakers.

The only time I listen to the radio is in the car... and that’s always 80s [music]... I don’t listen to any new stuff... Just put me back in the old times. I’ll be all right.

Sheila, 51

Radio hasn’t really changed. Most of the radio – in fact all of the radio – is listened to when I’m in the car, to be honest. I don’t think there is a particular day or anything I could say that I use or listen to radio in the house.

Donald, 70

Enthusiasm for podcasts seems to have declined a little since its peak in Wave 19. Although 11 of our 20 participants still claim to listen to podcasts via a variety of platforms (including Spotify and YouTube, as well as native podcast apps on their mobile devices), many do so less frequently than last year. In some cases this was as a result of lifestyle factors (e.g. less time on public transport); for others, the novelty appears to have worn off.

*Podcasts? I really like The News Agents, The Rest Is Politics...
I don't listen to podcasts as much as I used to.*

Jenny, 31

*[Peter Crouch podcast] That's on the phone. Not so much now, I don't
know why... I don't follow any... they'll just put them on Facebook or
YouTube.*

Mick, 50

Among those who are listening, there was an increase in the number this year claiming to use BBC Sounds to access audio content (primarily podcasts). More also claimed to use CarPlay (or similar) to play audio content from their smartphone while driving.

2.5 YouTube is becoming more and more important

Over several waves we have seen YouTube play an increasingly important role in many participants' media diet, and this year saw another notable increase, particularly in terms of the weight of claimed viewing, especially for those watching via a smart TV.

Several participants, primarily men, described YouTube as their main source of viewing now, in preference to either traditional TV or streaming services.

*I think I use YouTube an incredible amount. I keep on having a
dilemma. I think it's time for me to pay to get rid of the ads because I
watch more YouTube than pretty much anything, I think.*

John, 38

*I'd say [I'm on YouTube] from seven, eight o'clock in the morning maybe
through to ten, eleven.*

Peter, 63

Access to free sports highlights is an important hook for many, but they also talk about enjoying a diverse range of engaging niche content including special interest podcasts, old music and TV programmes, and alternative news sources. This includes a mix of short-form content and longer videos.

I'm really, really into cars. There's not too many good car shows any more, since Top Gear wound down. So I watch a lot of, like, YouTube content creators.

John, 38

There's lots of people I follow. And if I've got half an hour I'll watch a half hour video, and then obviously there's all the bits on the side that give you other ideas. I'll subscribe to those. So I think in the last six months I've gone from two [subscriptions] and I think I've got about 20 now.

Mick, 50

YouTube also continues to play a valued role as a source of educational content and "how to" guides.

If I want to do something, I go and find a video of it being done.

Geoff, 73

It's good for people like me that want to learn without always having to ask. I don't have to involve anybody. I can just do it myself... Yeah, I use it all the time.

Sally, 58

Viewers described feeling a strong sense of engagement with YouTube content and creators. It's easy for them to find useful, informative content that serves their personal interests because the algorithm is serving them a stream of such content. The ability to engage with creators and other viewers via comments was also praised; this creates a strong sense of community around some YouTube channels.

Presenters of these channels were often credited with having a real passion for their subject matter, independence from outside influence, authenticity and relatability. This mirrors some of our findings from Wave 19 around the growth in interest in podcasts. In both cases, the regular consumption of long form content has started to build a relationship of trust between creators and their audience.

The Gardening Guy and Flawless Cleaning. He's got quite popular now. I think he's even going to get some kind of award for what he does, which is nice.

Sheila, 51

I like watching people who kind of show authenticity, so they actually want to do what they're doing and they have that engagement. They are actually making a community, rather than just doing it for money.

Hazeem, 20

2.6 Most participants described their social media use as somewhat more limited, careful and targeted this year

Some previously heavy users of Facebook, Twitter and Instagram described themselves as spending less time this year scrolling through their social media feeds. This was often linked to recent or impending changes in their life (e.g. being a busy parent or planning for a wedding) which meant having less spare time available.

I probably do still have a reasonable amount of screen time, and I couldn't live without my phone. But, I'm not scrolling mindlessly as much any more. I think just when you're a parent, your time is more precious and I don't have four hours a day to scroll on Instagram.

Julia, 36

Where they were still using social media (especially Facebook), participants frequently described having specific reasons to do so (e.g. visiting Facebook groups to keep up with local news or using Facebook Marketplace for buying and selling). Several also described themselves having to use social media as part of their job.

On Facebook I've got groups, and I'll go on there just to see what's happening sometimes... when's the market on, you know, those sort of things.

Geoff, 73

I have an Instagram and maybe.... say probably somewhere between once a week and once every two weeks I will redownload the app, see if anyone's got engaged, and then delete the app again. Facebook... The only thing I use Facebook for is Facebook Marketplace.

Robert, 28

There are few prolific posters of social media content within the sample. The three youngest women were, at one point, each trying to build a presence on Instagram as a way of promoting side-businesses, but all have now stopped doing this, as they have either lost interest in the business idea, and/or other priorities in their lives have taken over. Other participants also claimed to be posting and sharing less than before, especially photos of themselves and/or family. Two in particular reflected that they had come to view the perceived social pressure to project an idealised version of their life online as unhealthy.

I'd post a picture of this unbelievable beach and make out that Thailand was the best thing in my life, but I wouldn't post when I was in a hostel with a middle-aged man snoring the whole place down, a blocked toilet and someone spewed all over the floor. So I was like, "Why am I even doing this?" because it's just a false reality... It was quite bad for my mental health, I would say.

Tim, 26

TikTok appears to be an exception to this trend. More participants have started to use it, and existing users still claim to spend extended periods scrolling through videos.

I think the best one is probably also the worst one. It's probably TikTok, because that takes up too much time.

Hazeem, 20

It's brain rot, but sometimes enjoyable brain rot. And I'm probably sitting on it for maybe two hours... three hours.

Jenny, 31

The way in which these primarily young users are consuming TikTok is very similar to the way older participants are using YouTube. They are mostly viewing content posted by creators, rather than posts by friends and family, and relying on the algorithm of the TikTok feed as a convenient way of accessing content tailored to their specific interests. They are also starting to use it as a search engine, in preference to Google, Bing, etc.

A lot of it is people just sort of doing, like, everyday daily [activities]. They're down to earth and they're doing stuff that you can relate to.

Brigit, 24

So if I find myself in Thailand, in a hostel and I don't really know the area, I want something to do today, I want somewhere to go to eat, I want an activity to do, I probably would just type it into TikTok.

Chloe, 24

2.7 AI-generated content is becoming more prevalent on social media

Most active users of social media in the sample claimed to have seen examples of AI-generated images and/or videos in the past year.

Sometimes you see some TikToks or videos on Facebook, or photos on Facebook, and you can sort of tell. Well, sometimes you can, sometimes it's hard to tell if they're AI.

Brigit, 24

All of the specific examples they were able to recall were – in their eyes – obviously fake, produced for the purpose of entertainment, such as the Gareth Southgate deepfakes prevalent around the time of Euro 2024. However, many participants were conscious that more convincing and insidious examples of AI-generated content might easily have passed them by.

A lot of it is obviously for comedy, to make people laugh. I think they're okay as long as they say that it's not real. The election in America has been the big one where there's been so much flying round there, where you'll see something that Trump said. And because Trump is such an outspoken guy, you actually don't know whether it's AI or whether he actually said it.

Tim, 26

What if Michael Jackson was on this hip hop song? And then they will just AI the Michael Jackson vocals over the top of a particular beat. Actually I find that kind of fun and interesting.

Robert, 28

Some participants claimed to have seen content flagged as “AI-generated” in their social media feeds, and were somewhat reassured that platforms were alerting them to such content..

I think there's been like a disclaimer on Instagram now where if you use AI, or it detects they've used AI, it will say this picture has been, amended or, edited using AI.

John, 38

Others described examples which hadn't been flagged by the platform, but which had been called out as fake by other users in the comments feed. This kind of user-generated moderation was much appreciated, and some users have come to rely on it.

You're already looking at a video and thinking that just doesn't look right. And then you look at the comments and people are pointing things out about it that are wrong about it. And then when you look back at it again, you're like, "Oh yeah, that's so not real".

Brigit, 24

If there's a majority that are saying it's real, or it's AI, then you kind of side with that group, especially if they are into AI themselves, or editors and stuff.

Hazeem, 20

2.8 Participants described seeing a lot of upsetting or extreme online content, but not directed at them personally

Participants commented that graphic and distressing images and videos were being served up to them regularly on social media, particularly in relation to the conflicts in Ukraine and the Middle East.

There's some content that I need to see, but I realise if I'm exposed to it for too long, it will have a negative impact. So I try not to.

John, 38

There were mixed feelings about this. While many felt it was important that they did get to see what was going on (and, in some cases, actively sought it out), others would rather not. All agreed that it was almost impossible to avoid.

Stuff like that, you don't search for it, it does just come up.

Chloe, 24

It just is like really sad to see but, at the same time, you want to see it rather than not being able to see anything because at least you know what is going on, I guess, even if it's upsetting.

Hazeem, 20

Other examples of perceived inappropriate or hateful content cited were linked to the July riots, and to the death of Liam Payne. In this context some participants voiced growing concerns about the potential impact of social media comments on high profile celebrities and influencers.

I did see in the run up to Liam Payne's death a lot of hate comments directed towards him, and it was like any video or any post about him at all, all the comments before he died were all like just hate comments... Now that he's obviously passed away, you're seeing a lot of posts about him. And there's still a lot of hate comments.

Brigit, 24

Liam Payne, for example. That was all over Twitter. People somehow had pictures of him and stuff. And that sort of stuff you don't want to see.

Tim, 26

Cases of participants reporting such content were rare, especially on X (Twitter), where some users believe extreme content is now actively encouraged and promoted. Rather than reporting content, they leave the platform temporarily to limit their exposure to the content in question.

Even though it [Twitter] did get quite toxic, there was still lots of good content on there. Now I'm finding less and less good content. It's all geared towards keeping you there and takes you down these kind of spirals of negativity.

Dai, 45

I don't report it or anything because I know, or I believe anyway, that nothing will change because that's how he wants to run it. So, I just close it off as soon as I see it, and leave it for a while until I know that my feed will have got updated and I won't have to look at it again.

Tim, 26

2.9 Protecting children is seen by parents as a difficult balancing act

There are five parents of school-age children in the sample. All acknowledged the difficulty of striking the right balance between protecting their children from harm and ensuring that they don't miss out on the educational, social and career benefits offered by electronic media.

Parents of younger children were able to use some of the parental controls built into technology, such as limiting their child's use of YouTube to YouTube Kids, or requiring parental approval to download apps to smart devices. Parents of secondary school-aged children were more reliant on personal intervention. Some mentioned using specific tactics in an attempt to monitor who their children connect with online, and what content they are able to see. It can be challenging staying one step ahead of increasingly media-savvy kids, and some felt that they were more successful at doing so than others.

It's quite challenging really, because you don't want to be too intrusive and you can't monitor everything. But I'm still very cautious about the kind of apps that he's allowed to download, and I won't allow him to set up accounts without a lot of scrutiny.

Dai, 45

[Daughter's] account is private. That's the caveat that we have as parents. You do not have a public account. And we do police it so that the only people that are on there are people that she actually truly knows. And that's been since that whole bullying episode.

Denise, 47

There were mixed views about the idea of banning smartphones in schools, which was being widely discussed in the media around the time of the Wave 20 fieldwork. Most parents were strongly in favour, although some acknowledged that this could be difficult to implement, especially when children need phones to be able to stay in touch with their parents.

I'm actually pretty optimistic. There's been a couple of petitions that I've seen and some schools are going smartphone-free until age 15... I think everyone will recognise the dangers and the negative effect that smartphones are having on childhood and adolescence, and I don't think we actually have to worry about it because I think they will be banned or more regulated, or the children themselves won't be into them.

Julia, 36

I wish schools would ban any kind of phone so that they can't bring them in. But I can understand parents who have kids who travel and need that kind of contact... Our school is very strict, so someone stands at the gates and checks them before they can even go into the school gates... I'm all for it.

Suki, 47



3. Personal data, privacy and security

3.1 Attitudes towards personal data and privacy are largely unchanged this year

We have not witnessed any significant changes in participants' attitudes towards personal data and privacy over the past three years. Most participants consider that giving out at least some personal data (e.g. accepting cookies or agreeing to an app's terms and conditions) is a "necessary evil", essential to being able to function in a world where more and more services are delivered online and/or via apps.

A few adhere to a strict policy of giving away as little information as possible, and only to trusted institutions like banks, government and the NHS.

Certain situations you have to, like the doctors... you've got to be online so you can look up your records and see what's what. So you have to put information, a lot of information into that. You know, I don't like it, but it seems to be a necessary evil.

Elizabeth, 63

Some others have adopted a fatalistic view that their data is now “out there” anyway, so they might as well disclose as much as is required to be able to access the services they want as cost effectively as possible. They don’t necessarily feel the need to be vigilant about who else might have access to this data.

Well, they’re going to get your information anyway. Whether you don’t give it to one company, another company already has it. So me going on to a website and making sure I don’t accept cookies... isn’t going to stop my data from going out there.

Hazeem, 20

The majority try to strike a balance between potential risk and reward, employing tactics such as limiting the kind of data they will share, keeping their social media profiles private, and turning off voice activation on their devices when sensitive subjects are being discussed (especially when working from home).

I don’t really care too much about my email because I’m just like “Delete”, whereas I don’t really like to give my phone number out to things because you can be really tortured with people phoning you.

Brigit, 24

You know, if there’s a call that I’m on that would be sensitive, then I definitely, you know, just switch it [smart speaker] to not pick up any audio.

Dai, 45

3.2 Participants are aware of being targeted by scam emails and calls, but feel largely confident about spotting them

A number of participants have fallen prey to security issues such as hacked social media accounts, scam calls and emails in previous years. Experiences like these, advice from friends and family and general exposure about the topic in the media mean that all participants are at least moderately well-informed about this kind of danger. However, this does not mean that all were immune to further problems.

Although participants were not happy about the volume of scam emails, text messages and phone calls they continue to receive, they felt broadly confident about being able to spot these. All appeared to be well-informed about the most common email scams, and some of the key signs to look out for when receiving such emails (e.g. checking the sender address).

Some of the scams are so bad that they put in a completely unrelated email address as a sender to the product that they’re purporting to send. I never click through a link.

Geoff, 73

When they are not completely confident assessing this themselves, participants will consult a trusted “expert” (usually a younger family member).

If I get something I’ll say to one of my daughters “What’s that?” And she’ll say “Mum that’s just a scam. Delete it.”

Cathy, 80

Many participants are now reticent about answering calls from unknown numbers. One mentioned a function on her phone which alerts her to potential scam calls. She liked this very much.

Because my life is so narrow and I’m loath to do anything different I can always tell if it’s a scam because I’m like, “Well, I don’t do that. Why would I get this? Why would I get that?”, you know? But even before that, this new phone said “This is a scam number”.

Elizabeth, 63

If it’s a weird number like 03 or 0800, I don’t have anything in my life that requires that. So I always know it’s a spam call.

Hazeem, 20

Nevertheless, there was some concern that scammers might become smarter at targeting individuals at moments when they are stressed, vulnerable or not concentrating 100%, and therefore not exercising full critical judgement.

I try not to take it for granted that... I’m not going to be fooled by these things, because they’re getting much better at targeting people, and going for your weakness maybe when you’re not expecting it.

Dai, 45

A case in point was the participant who had unwittingly been charged £150 for a pdf printing service she needed to use in an emergency to print one document.

The broadband wasn’t downloading the ticket on my phone. We couldn’t get it to download so... I paid 79p to download one document. I thought that I clicked “Please don’t sign me up to anything else”. I’m usually very careful to do that. And I found out that, for the past three months, they have been taken £49.95 out of my bank account every month. That’s naughty. And I kick myself because normally I’m more savvy than that.

Denise, 47



4. News

4.1 Attitudes towards news have become more polarised, and consumption habits more fragmented, over the past year

As far as most participants were concerned, the news cycle for the past year has been dominated by the conflicts in Ukraine and the Middle East. This has had a polarising effect on attitudes to news, with some becoming more interested in news (and wanting to dig behind the headlines) and others (primarily, but not exclusively women) seeking to avoid it.

If we're in the car, I will listen to Radio 4, Radio 5, which are all generally current affairs... And sometimes podcasts that delve into issues a bit more. I quite like the series called The Coming Storm, on BBC Sounds that talks about... why it is that part of the electorate in the US feel like they do... I think that's really interesting.

Dai, 45

It feels like I'm watching less news. It's more of the same, right?

Denise, 47

*I mean, I look at the news quickly, but it's all the same thing, you know?
And it's all very depressing. You know, I'm just wondering whether to
start hoarding canned goods at this point.*

Elizabeth, 63

The more engaged news consumers mentioned a diverse list of news sources they follow across social media and YouTube, as well as TV. These included some specific news brands that have not previously been mentioned in this study (e.g. Euronews, Bloomberg, NY Times, Novara Media) as well as individual content creators (e.g. Owen Jones, Piers Morgan, Mahyar Tousi).

In some cases, the choice of sources followed reflects a specific world view.

*What I like about GB News is... everyone gets a say. So you'll get people
on there talking and it will be what they call right wing, left wing, woke,
whatever.*

Sheila, 51

*You get a lot more in-person experiences on social media. But when it
comes to people reporting then I'll go to YouTube... Piers Morgan is one
of them. Zeteo, which is quite a new one, with Mehdi Hasan. But then I
also follow, on a more personal basis, Owen Jones, stuff like that as well.
People that I feel that are giving quite honest and impartial views.*

John, 38

However, a few participants claimed to triangulate contrasting editorial viewpoints on the same story to try and form a balanced view.

*I get up in the morning and I watch BBC News, Sky News, GB News,
Euronews and Al-Jazeera, and make my own mind up about what to
think.*

Geoff, 73

The less engaged news consumers often described themselves consuming more bite-sized news content which they often come across incidentally on platforms such as social media, particularly TikTok. Several also mentioned *The Week* magazine as a way of keeping abreast of major events without becoming immersed in the drama of news on a daily basis.

*A lot of the time I get the news off the bottom of the [app] built into the
laptop. The news on there, that's always flashing up with the latest
headlines. So I quite often go on there.*

Mick, 50

4.2. Although still the most widely consumed news service across the sample, BBC News seems to be less widely trusted than before

Since 2005, participants have accessed an increasingly diverse range of news sources, initially via their TV set and, more recently, online. In the first few years of the study broadcast TV news was considered the gold standard for accuracy and impartiality, and participants were able to articulate subtle differences between the news output of different public service broadcasters.

Over time, and as participants have accessed more diverse and opinionated news sources, distinctions are more likely to be drawn between the mainstream broadcast news media (such as the BBC, Sky News, etc.) as a group, and a plethora of independent news channels such as GB News, Al Jazeera and Rebel Media with highly diverse editorial standpoints.

Throughout the whole period, BBC News has remained as a kind of reference point, and the majority of our participants continue to access BBC News content in some form (increasingly via the app or the BBC website). However, attitudes to BBC News have become more polarised over recent years, with a vocal minority of participants expressing extreme scepticism towards its output, particularly since the COVID-19 pandemic.

This year, BBC News was still the most widely consumed and trusted news service across the sample, and it remains core to the news diet of some participants.

The main sources for me are BBC News and The Guardian.

Jenny, 31

I would say I get all my news really from BBC News now.

Robert, 28

I know the BBC gets a lot of stick, but I do sort of feel the BBC is probably the more neutral out of all them.

Geoff, 73

However, more participants claimed to be mistrustful of BBC News this year than in previous waves. This is in keeping with broader attitudes to the BBC (see Section 2.3, above), and was partly influenced by the Huw Edwards scandal.

Several were critical of the reporting of events in the Middle East by the mainstream media, and the BBC in particular. Some were also unhappy with how some sections of the media portrayed the July riots, and the events leading up to them.

My family were chatting on WhatsApp about a documentary, I think it was on BBC around the anniversary of the events of October 7th, very much told from an Israeli point of view, which was horrendous, obviously. But I've not seen a documentary about the other side on the BBC.

Julia, 36

I hate the BBC... The things that the news says to you and isn't true, like it's factually not true. The bloke who stabbed those three kids, they put pictures of him on there to make him look innocent.

Dean, 35

We asked participants if they felt that their views and experiences are represented in the mainstream news media. Participants from lower-income households and some of those from minority ethnic groups were most likely to feel that their views and experience are not represented, and these were the people most likely to be critical of, and sometimes hostile towards, the BBC.

These participants were the most likely to gravitate towards alternative sources of news and current affairs content online, particularly via social media. In contrast to their scepticism towards the mainstream news channels they appear not to think critically about content posted by creators they relate to and trust, especially when this reinforces their existing views.

*[Interviewer: "Do you feel that your views are being represented?"]
No, not at all! You have to go to Eton or something.*

Dean, 35

[On the BBC] you just have one set of opinions, you know? They're the ones that try and shut everybody else down. And this is the problem. Whether the opinion's wrong or right, you should be able to say it... You're constantly told you're wrong. How you feel isn't right. Your opinion doesn't matter. You know, it's just a bit overwhelming.

Sheila, 51

I think I trust the local media channels. So, for example, there's one called Spotted Oldham, and I think it's run by an Asian man. He posts news about Oldham, but it's not like biased, whereas BBC News can be biased.

Hazeem, 20

4.3 Participants did not think media coverage of the General Election influenced their voting choices

One area we explored this year was the role of broadcasting and electronic media in helping participants decide who to vote for in the 2024 General Election. The majority claimed to have voted, although only a handful followed coverage of the election results closely, and a surprising number didn't seem to be aware which party had actually won in their constituency.

Participants claimed to have used a mix of sources including party manifestos, leaflets and candidates' posts on social media, as well as traditional media, to help inform their voting decision.

I was probably getting the most information from BBC and The Rest is Politics. I did look at the Labour manifesto.

Robert, 28

I did, to be fair, just have a look at people's mandate. I went through YouTube to do that. To kind of avoid all the useless splurge that gets put on top of it. I kind of just wanted to know exactly who stood for what.

John, 38

I was quite big on doing my own research, my own reading. But then also, you know, it's good to see what other people's opinions are and just see their views. You don't necessarily have to agree, but just seeing what people's take on things were and you could get that from TikTok, mostly.

Jenny, 31

I went on various party websites. Also on - again - the BBC website. I think there was a Channel 4 one as well that I went on.

Denise, 47

Many were critical of the coverage of the election campaign in the mainstream media, and particularly the perceived emphasis on adversarial debate. Several claimed to have avoided or switched off the televised debates altogether because they didn't like the tone of the discussion there.

There were lots of shows on the telly with people literally screaming at each other. I was like "That is not going to be helpful for me. I don't want to listen to that".

Chloe, 24

I didn't watch any of the debates, mainly because I do get frustrated with the debates because it's all about mudslinging, really. They just sort of belittle each other. And that turns me right off.

Geoff, 73

I'm not educated in all the politics. I have to rely on what's told to me, and I just thought that it was absolutely diabolical.

Sally, 58



5. Reflections on 20 years of Adults' Media Lives

This year marked the 20th wave of research in the Adults' Media Lives study. In recognition of this we took the opportunity to ask participants to reflect on their changing relationship with media over the course of their involvement with the study. 15 of the 20 participants have been involved in the study for ten or more years, and 12 have been involved for more than 15 years. (Annex 1 contains summaries of the individual media journeys of eight participants.)

5.1 Many participants' attitudes towards media have changed over time, driven partly by developments in technology but equally by changes in their own lives

For many participants (especially those who have been in the study longest), the developments in media technology and services since 2005 have been amazing, impressive and occasionally frightening.

I did not believe that I would be alive to see some of the stuff that we're seeing now. So only heaven knows, when my daughter is my age, what the world is going to look like.

John, 38

Several participants view themselves as having been resistant to change. Some of these feel that they have grown to embrace new technology and have largely positive emotions about the benefits of having done so. Others are still wary and continue to evolve slowly and reluctantly.

I think I started off very sceptical, probably frightened of technology, simply because I didn't know how to use it. But the more you get used to it, the more you see some benefits. If I hadn't actually engaged with technology, I wouldn't have been able to have a job.

Donald, 70

You've got to sort of move with the times and embrace it. I use a laptop all day, every day. My phone, I'm on it all day, every day... I don't think I could live without a phone.

Mick, 50

It's taken a long time for me to adjust, you know, but you've just got to accept it.

Cathy, 80

On the other hand, several participants who were enthusiastic early adopters of new technology and services in previous years of the study feel that they have become more considered and cautious over time. This is partly a result of changed priorities in their lives, partly because the perceived incremental benefits of (e.g.) new generations of smartphones are marginal.

I've always been into tech, but I've always been, like, gimmicky... I've always wanted the newest things but I think I am happy where tech got to about three years ago. For me I don't need it to do any more.

John, 38

When I was younger I would have wanted the latest version and I would have wanted the best version and the most expensive version. Whereas now I know that I personally don't need that at all.

Tim, 26

5.2 The evolution of media technology has created numerous perceived benefits, particularly around choice, convenience and ease of communication

Participants had many positive things to say about the evolution of media over the period of the study. Perceived benefits included the choice of a wide range of content and services, and convenience (both in terms of means of content consumption and the ability to capture memories digitally).

Technology has changed really for the better. There's so much more on one TV than I ever thought there would be.

Peter, 63

It's a different way of life now, isn't it? Everything's at your fingertips, from ordering shopping that arrives in five minutes, to booking holidays without having to go to a travel agent, to making phone calls wherever you are... And also things like recording memories... I remember my Bamps had a big sort of movie camera when we were kids, and he'd have it on his shoulder. Now you've got your little phone and it's better quality than anything.

Denise, 47

Increased choice and convenience have led to the opportunity for greater personalisation of media choices, and access to more diverse interest-specific content.

I think as you delve into niches... maybe there's not a huge market for that content, so there's not a whole load of money to be made from that programme. So it's not going to be of high production value. But actually it might tell you what you want to hear, or what you need to hear or, you know, tell you a story that you want to hear as well.

Dai, 45

Improved communication with friends and family was another perceived benefit, as was the ability to stay in touch with people (e.g. university friends) with whom contact would previously have been lost.

I was actually speaking to my granny about it and she was saying that she would just lose touch with people. If you didn't write letters to them, you would lose touch. There's so many people that she said that she would have still been friends with if it had been this easy to stay in touch with them. Even things like having someone on Instagram that you went to university with and seeing them get a new job and getting in touch. It's all levels of it.

Jenny, 31

Participants feel better informed about what is going on in the world (if they want to be).

I like the way you can see what's going on in the world, whereas before we were oblivious. We wouldn't have known about all these wars and things back in the day. We just wouldn't have known it.

Elizabeth, 63

Lastly, media technology has been empowering in various ways to some of our sample. For one, getting to grips with technology has allowed her to rebuild her life independent of a series of difficult relationships with controlling partners. Another has been able to build a career tutoring students all over the world from the comfort of his own home. This career wouldn't have been available to him before the growth in video-conferencing technology (particularly during the COVID-19 pandemic).

Skype, Zoom and Teams... I will use one of those every single day... which for my work has been amazing because it means I can work with kids in the US and Hong Kong and Singapore, and it also means I can go to Singapore but I don't have to take a month off.

Robert, 28

5.3 However, there are also several perceived downsides, including the challenge of keeping up with technology and the risk of exposure to online harm

Change was not seen as universally positive, however. Because of the rate of change, participants remarked that it has become increasingly difficult to keep up with technology. This includes the risk of losing cherished memories through storage technology/platforms becoming redundant.

I've lost a few things as I've changed phones over the years where they've not been backed up or put on an external drive or something. But it's knowing what's safe to store those precious memories on, whereas a photo's a photo, you can always see it. I've lost a couple of videos where my kid's really little and my Nan and my Bamps were in it. Stuff like that... I don't think I'll ever get back.

Denise, 47

It's also more dangerous being a media consumer, because of the risk of exposure to online harm, scams etc.

I preferred it in the old times when everything was a bit easier and not so much like... all this social media and all that lark, and like how easy it is to access bad things, I suppose.

Dean, 35

Some participants considered lack of privacy to be a problem and some younger participants in particular expressed concern that their digital footprint might cause problems for them in the future.

It is very easy to find out everything about people if you really want to. Yeah. It obviously can be dangerous. Your digital footprint as well. You know, once it's out there it's out there and it will follow you for the rest of your life. And obviously when you're younger, you're more naive. You can do things or say things... You see a lot of people now getting cancelled for things that they've said ten years ago.

Brigit, 24

Another social media-related downside was anxiety caused by the perceived need to keep up with others, or portray an idealised version of themselves.

Living for others. Your whole aesthetic... Not so much for me, but nobody can say that they've not been impacted by it to some level... Comparing yourself to others.

Jenny, 31

If we were all honest with ourselves, why do we post photos? Isn't it to show off a little bit? If it's not that, then why do I need to post my family holiday photos on Instagram?

Julia, 36

One negative effect of the personalisation of media choices has been some fragmentation of family life. There's less time spent consuming content together.

We won't be probably as family-orientated as we used to. Now it's like everyone comes in and everyone's just sitting on a device because it's like mindless activity and that's how everyone cuts off.

Suki, 47

5.4 Smartphones are the technological development most widely credited with having had the biggest impact on participants' lives

When asked which media device, platform or service has had the single greatest impact on their life over the course of their involvement with the study, the majority chose the smartphone (often, more specifically, the iPhone). They praised it as a device which is powerful and convenient – a computer in your hand.

I mean, if you were to say then that there would be phones you had in your pocket that did this, did that. I'd be "Well, no, that's on Star Trek isn't it?"... It's amazing how far we've come.

Sheila, 51

Participants remarked that smartphones have changed the way in which content is packaged and the way in which we interact with society, institutions and the world around us. Most are now heavily dependent on them.

The key thing, I think, was the invention of the iPhone, which then just pushed a whole load of different content to you wherever you are... The things that you consume, the way that you can see it, we're going to get more and more aligned to this device.

Dai, 45

[Technology] It's come on in leaps and bounds... I don't even think we had a laptop back then... Now I use laptop all day, every day... I don't think I could live without a phone. We use it all the time.

Mick, 50

5.5 Expectations about the future are dominated by the rise in artificial intelligence

Participants felt that the future was difficult to predict with confidence.

Most believed that the impact of artificial intelligence (AI) would be significant over the short-to-medium term, though they weren't necessarily sure what this impact would be, and whether it constitutes a threat or an opportunity (or both!).

AI is slowly starting to creep into every aspect, and it's still a quite an unknown beast. But I think that will become a much bigger part of our lives, not just in our professional lives, but in our personal lives. I think AI is definitely here to stay, and it'll become a much bigger part of our lives than we actually realise.

Jenny, 31

Areas where the impact of AI was expected to be greatest were the education system and employment opportunities. Some parents were concerned both about the risk of AI being used by kids to "cheat" in their studies and – in the longer term – whether their kids are learning the right skills for the future.

Two participants specifically mentioned reconsidering their future career plans in the light of the growth in AI.

Jobs obviously will be affected for maybe the next five, ten years because of AI. It could be a good thing because businesses will want more people working on it, or it could be a bad thing because it's taking over certain jobs... I should get into AI somehow.

Hazeem, 20

Conversely, a few participants predicted (and perhaps hoped) that there might be a backlash against media technology in years to come, and people might choose to lead simpler lives.

Either AI will have taken over and we'll all have lost our jobs, including me as a doctor. Or, I wonder whether we will go full circle, and whether teenagers and kids will reject it as being this ridiculous thing. I don't know, I think it could happen. I don't think it's out of the question that there might be a bit of a rebellion against it.

Julia, 36

You know what? I think in ten years' time people are going to get fed up... with where everything is going, and they're going to want to pull it back a bit... People are going to get pissed off with being watched in everything they do, all the data harvesting and all that.

Sheila, 51

Annex 1: Participants' media journeys

Adults' Media Lives is a longitudinal research study, which means that we interview the same participants annually over an extended period of time. This allows us to follow individual participants' life journeys and their evolving relationship with media technology.

As an example, we have chosen eight participants to profile in this section. Like the study as a whole, they represent a mix of gender, age, location around the UK and social background. They also have diverse and insightful personal media journeys that may be indicative of broader trends in society.

NB: for data protection reasons we have used pseudonyms throughout.



Case Study 1:

Tim – a thoughtful and successful digital citizen

Tim's bad early experiences with social media helped shape his development into a sensitive critical thinker who is thriving in the modern world of work.

Tim joined the study in 2013, aged 15 and studying for his GCSEs in rural Yorkshire. Now aged 26, he shares a house in Leeds with his partner and works in a management role for an online betting company.

During his first few years in the study Tim was the victim of various forms of online harm. These included both anonymous 'trolling' on social media and more targeted and insidious online bullying.

When I was on Ask FM someone had posted something really abusive to me saying "You're ugly and spotty and no one likes you" and so on. It just irritates me because they can do it anonymously, so you don't know who it is, which I think's wrong.

2013

This guy messaged me on Facebook... threatening me and so on and really being quite nasty and trying to scare me. And then he managed to get my phone number and he was phoning me saying weird things and trying to scare me. And it did get to the point where I said "If you don't stop, I'm actually going to call the police."

2014

These experiences, and his university studies in Psychology have led Tim to be circumspect about how he interacts online. He is aware of his social media footprint, and sensitive to the impact of social media posts on other people.

You know, I'd make sure that I can't be called racist... If I share something to do with feminism or something I don't want to be seen as sexist.

2014

You're watching what you say because you obviously understand that the people who employ me, maybe future employers, people will be checking up on me... They'll be checking up on social media. So obviously I'm still careful what I post on there, retweet, stuff like that.

2017

Greta Thunberg... [I see] people just taking the mickey out of her constantly, which I think is absolutely ridiculous. With stuff like that, I tweet back saying "Take a look in the mirror... mocking a girl behind a fake Twitter account for doing something absolutely incredible".

2020

In his final year at university, Tim worked as an online trader for a betting company, and he was offered a full-time job after graduation. A lot of his work involves interacting with colleagues and customers online, and he thinks deeply about the importance of communicating appropriately, and being sensitive to others' feelings. In 2020 he trained as a mental health first aider and, during the pandemic, he was responsible for managing his team's transition to home working. All of this has helped him quickly progress through the ranks to a management role.

I really enjoy my job, which is good. I absolutely live for football. And I'm a football trader so, when I'm at work, I'm watching football or I'm trading on football, boosting prices on football, selling football. So it doesn't feel like work as such.

2018

I was put in charge of allocating my teams's work equipment, so I had to work with engineers to disconnect the monitors and so on, and then make sure that all of our team had what they needed to work from home.

2020

Tim remains enthusiastic about technology, embracing the switch to hybrid working and, recently, developing a strong interest in AI. But this is tempered by concerns about the harmful effects of excessive screen time and the need to maintain a balance in life.

When you stare at a screen all day, it takes energy out of you without you realising. And then when you carry on doing that, whether it's a phone, a TV, playing on the PS5... then it can get too much... Now, I'll go to the gym or go for a run, go for a walk, whatever. You feel a lot better and you get that break, rather than it being a continuous thing.

2022

As you kind of get in a more senior role it's more expected that you work, that you're across messages, things like that. I'd be reading messages at 10.00 at night when, you know, I finished work five hours ago. I'm a lot better now. I will just turn my notifications off at 5.00 pm and just stay away from it as much as I can.

2023



Case Study 2:

Julia – a social media addict... with boundaries

Social media has played a prominent role at each stage of Julia's media life, offering benefits but sometimes creating issues. As a busy working mother she still values social media, but it is less important.

Julia joined the study in 2006, aged 17 and studying for her A Levels in Belfast. Now aged 36, she works as a doctor. She lives in a house in South-West London with her husband and young daughter.

When we first met Julia, she had a self-confessed addiction to the now-defunct social media platform Bebo.

In school you just always talk about Bebo. It has just taken over. Everyone that I know is completely hooked. It's just addictive. I can't remember life without Bebo. I don't know what we did this time last year without it.

2006

Bebo on her laptop was soon replaced by a similar addiction to Facebook, and later Instagram, on her smartphone. This led to a series of problems with unexpectedly high phone bills throughout her student days.

It's got 500 free text and 400 free minutes for £36 a month. And last month, my bill was £186. And this month it's £107. Oops.

2007

I got a bit naughty using the data in Australia, so I think I've got [a bill] coming in a couple of weeks to pay for that. I think it's maybe £150. I don't pay my phone bill, but I haven't broken that news to my parents yet. It was stupid, I knew it was, but I'm just so addicted to the internet, I couldn't not use it.

2012

By 2014 Julia was a qualified doctor, but still devoting extended periods to scanning social media, preferring to do this to socialising with her colleagues during her breaks at work. Paradoxically, this anti-social behaviour was driven by a strong desire to stay connected to friends and family as she moved to different locations as part of her medical training.

We get very regimented breaks, and I'm conscious that I'm always sat in the corner on my phone and I don't look up or talk to anybody. And I sort of feel like you maybe should. But then I think "Well, this is my break and I just want to switch off and not make small talk with my colleagues".

2017

I mean, I know that I have been a bit of a prolific social media user but no more so than any of my other friends. It has been a huge part of my life, a huge part of making friends and keeping in touch with friends as we've kind of moved away to uni and to work.

2014

Despite the practical issues she has encountered, Julia has always been well-informed around issues of privacy and security. She is conscious of her responsibilities as a medical professional not to say or show anything inappropriate on social media.

There have been, I think, two examples that I can think of where the medical school found out about things on people's Facebook, and they were called up on it... It was stupid to put it on Facebook. I just don't know why people do.

2010

They don't breach patient confidentiality, but I think some status updates - about funny things that happened at work - I wouldn't want put up under my name on Facebook. I just don't think that's appropriate for Facebook.

2013

In recent years, Julia has taken steps to reduce the amount of time she devotes to social media. Periodically, she deletes social media apps from her smartphone to remove the temptation to use them.

When I got this new phone in June, it would send me weekly screen updates, and I think I was averaging something like six and a half hours a day on my screen. A lot of that was just mindless scrolling that was completely pointless and adding nothing to my life.

2021

Becoming a mother in 2022 changed Julia's priorities further. She no longer has so much time to scroll on social media. But, she still uses sources like Facebook and YouTube to support her parenting and as a means of entertaining her child.

I now access a lot of mother and baby stuff, which is like a whole new world out there that I didn't know existed. There's a Norland Nanny that I follow on Instagram who has an app which I downloaded and paid for. And there's loads of information about looking after babies and activities for them and routines. So that's been really useful.

2023

I delete Instagram during the day so that I'm not endlessly scrolling when I'm with her. And I'm probably back using Facebook more again because there's a doctor mums' Facebook group that I'm in, and it's brilliant for absolutely everything.

2024

Some mums around here are very screen-free and no screens but, if I'm on my own with her for a day, I really appreciate if she'll sit down for half an hour and watch something on TV. She's a bit young to have much of a concentration span, but she watches a lot of someone called Miss Rachel on YouTube, who she loves... I think she's actually learned a lot from it.

2025



Case Study 3:

Dean – a disillusioned digital sceptic

Dean's journey towards mistrust and disaffection has been influenced both by his media consumption and by personal experience.

Dean joined the study in 2006 as a 16-year-old school student. Now aged 35, he works as a carer and lives alone in a flat in Essex.

The internet and his mobile phone have always been Dean's most important media technology.

So my mobile phone, my iPod and the Internet are like all my favourite things. You can take the radio away, you can take the telly away if you want. But the Internet's the most important, I think.

2006

But he also developed an interest in news in the early years of the study, and trusted the mainstream news channels.

Some things aren't true in the paper. That's why everyone's like "Oh, don't read the Sun"... But on the telly... I expect it to be true. If it was on (there), I would believe it.

2009

If there's nothing on, I don't mind actually watching the news and what's actually happening in the world nowadays. Like before I would be, like, "I don't care", but I suppose that maybe I've matured a bit now. It's only really BBC that I turn to.

2011

In his 20s, Dean became a father, split from his partner, and changed job a number of times. He became increasingly disillusioned and upset by what he saw in the news, and started to avoid it.

Maybe I should care about what's happening in the world. But if the news is on, I'll make sure I turn over and watch something else.

2015

It just seems that everything on the news seems to be depressing, doesn't it, about terrorism and all that stuff. So I don't watch it. I'd rather just watch something to make me happy.

2016

Spending more time online, and worried by coverage of emotive subjects like grooming and paedophilia, Dean began to engage with alternative, right-wing news sources. He became increasingly critical and mistrustful of mainstream news outlets such as the BBC and Sky.

Rebel Media is only site I'll go to. I watched an interview with Tommy Robinson. He's like some sort of activist, against child sex grooming and stuff. And his friend was live-streaming it on Facebook at the same time as they were interviewing each other and Sky News cut and copied what he said to make it sound different to what he said. They lied about it. They made fake news. How could you do that to someone?

2018

I don't know if it's a massive left wing agenda or something like that. It seems like that to a lot of people.

2021

I hate the BBC... The things that the news say to you, and it isn't true... like it's factually not true. The bloke who stabbed them three kids [in Southport in 2024] they put pictures of him on the [BBC website] to make him look innocent

2025

Now in his thirties, Dean has disengaged from the mainstream media, and consciously avoids the news. The limited information he does access comes from alternative sources, and reinforces his view that the BBC is not catering for people like him.

I hate the news, man. If you're just a normal working class British man, you won't get seen... do you know what I mean? And I think everyone's getting the hump with it, you know?

2022

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, Russia and everything. Whatever happens, I can't affect nothing.

2023

*[Interviewer: "Do you feel that your views are being represented?"]
No, not at all! You have to go to Eton or something.*

2025



Case Study 4:

Denise – a tech enthusiast with digital battle scars

Despite her background working in technology, Denise has not been immune to difficult online experiences.

Denise joined the study in 2006, aged 28 and working as a customer service representative for a cable TV company. Now 47, she works as a charity fundraising manager. She lives in a house in Cardiff, and is married with one teenage daughter.

When she first joined the study, Denise considered herself to be both digitally savvy and an avid early adopter of new technology. She was the self-professed “family technician” others would turn to for help with anything digital.

People do call on me more than the other way around, it would be fair to say. I think it's because of where I used to work. They just think that I know about everything, and that includes the things that have come out since I finished working there, you know?

2007

Motherhood (in 2009) changed Denise's priorities, and her media use became focused on supporting and enhancing family life during this period.

There's Mumsnet as well, and there's just rows and rows of these forum pages where you post a question and you'll get lots of answers.

2009

Denise was the first participant in our study to work remotely (long before the pandemic) and was also the first to set up her own online business (in partnership with her husband).

My job is going from being office-based to being mobile. We're going to be getting BlackBerrys. We manage our own diaries, but if we're not in meetings, we should be in the office. That aspect will be removed. I think it will be easier.

2011

We're also in year two of having a separate side business, having both of us working full time. We paid a friend to set [website] up for us and brand it... We do all the updates.

2018

The growth in sophistication of online threats has out-paced Denise and her family's understanding. From 2016 onwards, they had several bad experiences including having social media accounts hacked and becoming victims to online fraud.

Very recently our Facebook account got hacked. And then, all of a sudden, we had a message to say that our VOIP account had been hacked, and then the Twitter one. And I was like, "Whoa, what's going on here? How come they're getting access to all of this?"

2016

We nearly lost our Facebook page for the business, which would have been dire. You know, it's tough to restart and get everybody to come over. I think it just made me more aware of the privacy settings, to watch out who's following you, to not like every friend request.

2017

In the meantime, as her daughter has grown up, Denise and her husband have found it challenging to moderate her technology use and keep her safe from online harm.

We changed the password on it [iPad], but the little madam was stood over her dad's shoulder when he picked up the iPad and put the password in and he didn't realise that she was standing behind him.

2015

It's difficult really, isn't it? Because one minute an app is really cool and the kids are all on it and the next minute it's so yesterday it's last century, you know, and they're all on something else.

2022

I've tried to restrict how much time she's on her mobile, but she's worked how to override it. [Husband] has bought a mobile phone cage from Amazon. He's like "Right... We're all locking our phones in it at 8.00. You can forget it" which I think will be healthy, to be honest.

2023

Denise was deeply upset but felt powerless to intervene when her daughter suffered from online bullying at school. Although technology continues to play an important practical role in her life, experiences over recent years have led her to feel more ambivalent about digital technology.

[Daughter] has been bullied relentlessly through it [social media]. 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... You've got your daughter absolutely inconsolable because of something that was on social media that there's no evidence of now. How do you deal with that as a family? As a mother?

2023

What advice would I give my younger self? Stand your ground and not let your child have a phone until they're a lot older than when she had one. Absolutely not.

2025



Case Study 5:

Mick – a family man and digital convert

Mick's digital literacy has grown exponentially over time, inspired by his desire to stay in contact with his family and facilitated by compelling features on his smartphone.

Mick was one of the original recruits to the study in 2005, aged 30 and working as a mechanical engineer for an airline. Now aged 50, he works as a specialist in vehicle testing. He lives in rural Derbyshire with his wife and two children.

When he first joined the study, Mick had a very traditional relationship with media and little interest in technology.

I've never sent an email. Never. Never had the urge to send an email. If I want to speak to someone, I'll phone them up. I know that you can access the internet and everything. I can't see the purpose of having that on a phone when the screen is so small. To me, it just seems a waste of time. I've got it, but I never use it and I never will use it.

2005

As smartphone technology evolved, Mick changed his opinion and soon became one of our first (and most evangelical) iPhone users. In 2008 he was promoted to a desk job, which required him to develop PC skills which changed his life.

I made the decision to have an iPhone. And it's brilliant. Since then, other people at work have played with it, and they've got it as well. There's apps for everything. I see some of the ones on TV, and I just think it's phenomenal.

2009

When I first started, I was just an engineer on the shop floor. My use of computers was just the stores computer, ordering parts. And obviously then I got a job working in the office. I had to go on Microsoft Excel courses, Word courses and it just completely blew my mind. But it opened my mind up too.

2014

Mick is a good example of how having a powerful motive to engage with technology drives digital engagement. He is devoted to his family, and staying in touch with them has inspired much of his technology adoption.

I like the camera bit, the camera on my phone and the video. I've got one of my son when we were at a local park just running around in the puddles. It's just nice for us to remember when I'm bored at work... just to look at, and remember my kids.

2005

What we do on the iPad is Skype. So when I go away, I just phone that and they put it in the kitchen and talk. I can talk to them while I'm away and see them as well. We do video calls.

2012

In 2012 Mick changed jobs and, in recent years, has travelled extensively for work, including abroad. His smartphone has become a valued source of information and entertainment, as well as keeping him in touch with home.

When we're out testing, you're just sitting on a train just going backwards and forwards for 12 hours. It's extremely boring. I went down to London on our train. I was in London for six hours for an hour's work... So I just downloaded films and all sorts off Sky onto my phone and just sat watching them.

2021

In Wave 20, Mick reflected on how radically his relationship with media technology has changed. Whilst still a limited user of social media, for example, he nevertheless recognises how important technology has become to him.

You've got to sort of move with the times and embrace it. I use a laptop all day, every day. My phone, I'm on it all day, every day... I don't think I could live without a phone.

2025



Case Study 6:

Sheila – a resilient but impressionable online explorer

Developing media literacy skills empowered Sheila to overcome challenging situations and take control of her life, but a lack of critical awareness has left her vulnerable to extreme content.

Sheila joined the study in 2005 as a 32-year old stay-at-home Essex Mum. Now aged 51, she is divorced and works as a carer. She lives in a house in rural Somerset with her two adult sons.

In 2005 Sheila had a low level of digital literacy, relying on her then husband to decide about media-related matters. This left her powerless to intervene when her young sons accessed inappropriate content online.

My husband will sit there and talk to me about cookies. And I've got no idea what he's going on about. On the Outlook Express, I've got a Hotmail or something, and I don't know how I get on that.

2005

You want your children to be on the computer. That's what they're learning in school. I don't want my two children to be any different than any other child... It didn't say that it was anything rude, but he clicked on it to see what it was. And then all these images came up.

2005

The break-up of her first marriage forced Sheila to take active control of her own and her family's media life. Developing digital media skills helped her grow in confidence and rebuild her life.

I've got a new email address, I've got a new eBay account and I'm also on MSN, which I wasn't on before. And online dating!

2006

I spoke to my Sister-In-Law. She does shopping online, and she just said to me "Look out for the lock sign. That's all you've got to do. Look for the lock sign. It will come up at the bottom...then you know, you're safe." So I was like "Cool, OK."

2008

Later, digital access to public services via her smartphone helped Sheila escape from an abusive relationship. It also facilitated a move away from her native Essex to build a new life in rural Somerset.

I couldn't have done anything that I was doing without having a phone. Not at all. Especially one with internet on it. And even now, I know I'm at my Mum and Dad's, but I've got no computer. We left with nothing like that... To bid on these properties and to do my banking and do shopping so I can get shopping delivered, I have to do it on my phone.

2014

Social media has helped Sheila settle into her new community and make new friends. But it has also exposed her to conspiracy theories and other content which makes her mistrustful of mainstream media.

You're kind of getting to speak with other people [on NextDoor] and they're saying "I'm new on the site, Hello!". And you get waves or you get silly little symbols like a cup of tea, do you know what I mean, or biscuits sent to you... it's hilarious.

2024

Now, whether this is out on the mainstream, I wouldn't have thought so. But Donald Trump has managed to get a shipment that he's confiscated of pills. Now, these pills contain human flesh, and some of them have been found to have missing children. Now, whatever you want to make of that, this is stuff we're hearing. It's very, very dark.

2018

The next frontier for Sheila is the proactive and creative use of the internet. She earns money 'flipping' items she buys at a local auction house, and aspires to hosting her own YouTube channel.

I'm doing my own cooking channel for YouTube. A lot of the stuff I'm talking about in it is mental health awareness. That's kind of what it is. And a therapeutic part of cooking is good for you. I don't know how it's going to go down.

2023



Case Study 7:

Elizabeth – a cautious digital opportunist

Elizabeth's behaviour often seems to contradict her attitudes. She claims to be wary of digital devices and services, but happily steps out of her comfort zone when she identifies a benefit.

Elizabeth joined the study in 2006, aged 44 and working in hospitality. Now aged 63, she is unable to work for health reasons. She lives alone in a flat in London, but sometimes lets her spare room to lodgers.

When she first joined the study, Elizabeth was wary of media technology and deeply concerned about privacy. She limited the amount of information she shared about herself online to the bare minimum.

Who goes and just tells the whole world everything about your age, who you are, your deepest, darkest secrets? I mean, you wouldn't tell anyone you'd just met in a bar all those things, so I don't see why I should write those things down for everybody to know.

2007

I mean, when I see people on Facebook and they put everything... the school they went to, the university they went to, how old they are, when their birthday is... Someone could steal your identity like that, you know, and you don't even have to know them because that will show up anyway when you're looking for somebody.

2012

My Facebook literally says "Nothing to see here".

2016

Despite these misgivings, Elizabeth was increasingly attracted by the social benefits of media technology. She has dabbled with online dating over the years as well as various websites that facilitate real-world social interactions such as Meetup groups and (recently) Sofar Sounds events.

I've joined a Meetup group for people that like going to the theatre and then they'll just post when they get cheap tickets.

2012

I'm addicted to dating. I've realised that that's just an addiction now. And every time I try and tear myself away, I can't because you get a message saying "So and so wants to meet you. So and so has left you a message". Don't drag me back!

2014

Like with Sofar Sounds... I would never have booked tickets. That's a new thing. And indeed, when I first did it, I said "This could be a scam", because I'd never heard of it.

2025

Elizabeth has suffered major health issues and has grown to value the ability to search for health information online. She trusts other people's 'real world' experiences, and gravitates towards YouTube for finding these.

This is what I do like the computer for... You can find out. And then you might have other people that have had something similar. You can read up what they have on the forums or whatever. So I do quite a lot of that.

2010

Any time I'm going in hospital, or anything that's wrong, I always look it up on the internet. And sometimes they don't tell you all the stuff you could have, maybe because it's going to cost money or whatever. They tell you what they're going to do, but they don't tell you the other options... It makes you feel good to have a bit of control.

2012

I like YouTube because it's real people. The first thing I typed in was "Surgery gone bad", because I wanted to see where those people had gone, for the surgeries to go bad. You know, to see if any of the ones that I shortlisted were in amongst those names of the places where people had gone.

2014

These days, Elizabeth still considers herself a laggard in terms of device ownership and media usage, and remains suspicious of the privacy aspects of smart technology. She feels that her limited digital engagement has helped to protect her from scams and online harm.

Oh, you know my views on Alexa. And now everyone's saying it. You see, I'm ahead of my time. I said, "Alexa, the spy in every home"!

2020

I'm one of these people that, you know, I do things because I have to do them. I need to be dragged kicking and screaming into doing them. I never bought my first mobile phone. My friend bought it for me out of frustration. I think she got me two, actually. 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.

2021

Because my life is so narrow and I'm loathe to do anything different, I can always tell if it's a scam because I'm like "Well, I don't do that. Why would I get this? Why would I get that?"

2025



Case Study 8:

Cathy – a digital latecomer with reservations

Cathy is comfortable with a range of online tasks, but barriers still remain to her becoming fully digitally engaged.

Cathy, a retired office worker, joined the study in 2008, aged 64. Now 80, she has lived alone in a house in Edinburgh since her husband passed away.

When she joined the study, Cathy was ambivalent towards technology, and would probably have been classified as “digitally excluded”. She didn’t have a computer despite having used one at work, and her mobile phone use was very basic.

Why would I want to go on the Internet on my phone? But, to be honest with you, I’m frightened to do that on my phone because I think “What am I doing?”. I’ve gone to do it a couple of times... and then I cancelled it.

2009

From early on, Cathy claimed that she felt pressure from society to go online, but lacked the confidence to do so, and managed to get by thanks to the help and support of her family.

Now I’m finding that more and more. Even my insurance company, they don’t give you a phone number now, they give you a website number, or website address, I should say. They just assume that everybody’s got a computer. It’s annoying. And I’ve got to involve my daughters. I’ll say “Will you look up such and such?” “Okay, Mum.”

2009

I’d love somebody to tell me what was the best computer or what was the most reliable computer. Or what’s the best broadband. You know, it’s all these things. I don’t know.

2010

By 2011 Cathy had acquired a hand-me-down laptop, and quickly started to develop the basic digital skills she felt she needed. These empowered her to search for information and stay in touch with friends and family.

I’m just getting more accustomed to it now. I’m not frightened of it. You know, I can go on and look up things.

2013

Probably I'm using my computer more because my brother, for some reason, now that he's retired, he's Skyping me a lot, from Portugal. Because I'm 73 this year I've got to renew my licence so I did that on there. It came within a few days too, it was good.

2017

Over time, she also started to help her elderly neighbours with their online needs.

She'll come to me, "When do the buckets get emptied?". I've got to look it up. I'll print off of it and go "There! That's the days the rubbish gets collected." "Thanks very much. I don't know what I'd do without you." Or timetables for the trains and what have you.

2020

Cathy finally acquired a smartphone in 2020, and has embraced apps which enable her to perform existing tasks in a more convenient way. She has also started using a smart speaker to listen to music and search for basic information.

Well, I'm on WhatsApp, because my two daughters are on WhatsApp, and my sisters, so it's cheaper, I believe, to do that. What else am I doing on it? Well, I can look up the weather!

2020

But she remains cautious about online privacy and security. She has no interest in social media and remains steadfastly resistant to the idea of online banking.

I know the time will come when I can't go to the bank and I know the time will come when I'll probably have to do my banking online. But at the moment I just do not want to do it... Twice my sister's been scammed and lost a bit of money and I think "No, I'm not going down that road". I'd be frightened in case I pressed the button and "Poof!" there it goes.

2023

Annex 2: Discussion guide

General media usage

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?

Working/studying at home

[WHERE RELEVANT] Do you work from home some or all of the time? Has this changed in the last year?

How are you using technology to help you work from home? What are the benefits and/or drawbacks of this?

[WHERE RELEVANT] How are you using technology to help you/your children with your/their studies? [PROBE FOR DETAILS] What are the benefits and/or drawbacks of this?

Smart tech

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

How often and in what circumstances do you use voice-activation features such as Alexa or Google Assistant to control your devices?

How effective are the voice activation features and how do you feel about using them?
[PROBE FOR +VES AND -VES]

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?

Health and wellbeing

Thinking about the relationship between electronic media (TV, radio, internet, apps) and health and wellbeing...

Have you used electronic media (e.g. websites, social media, apps) for information or to access support about health and wellbeing? [PROBE FOR DETAILS]

Do you use media technology (e.g. apps, smart devices) to help track your exercise or monitor your health? [PROBE FOR DETAILS]

Do you have any specific concerns about the impact of the media you consume (and the time you spend doing so) on your physical or mental wellbeing? [PROBE FOR DETAILS]

Compared to last year, are you spending more or less time looking at a screen?

How concerned are you about how much time you spend looking at a screen? Why (not)?

What steps (if any) have you taken to reduce your screen time? [PROMPT FOR ANY USE OF PHYSICAL METHODS SUCH AS PHONE CAGES DURING MEALS, LEAVING THE PHONE OUT OF REACH AT NIGHT, ETC.]

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

Creative use of media

Have you used media technology (e.g. apps on your phone/tablet, websites or software on a PC) in any kind of creative way in the past year? [PROBE FOR DETAILS. EXAMPLES MIGHT INCLUDE USING PHOTO/VIDEO FILTERS OR EDITING SOFTWARE, DESIGN TOOLS SUCH AS CANVA, OR GENERATIVE AI TOOLS LIKE CHATGPT OR MIDJOURNEY]

[WHERE RELEVANT] How did you learn to do [X]?

What were the benefits to you of being able to do [X]?

AI

To what extent has your home or work life been impacted by AI since we spoke last year?
[PROBE FOR DETAILS]

Has your attitude to AI changed in the past year? Do you trust it more or less? [PROBE FOR DETAILS]

Have you come across any examples of fake photos or videos (e.g. on social media), that you know or suspected were generated by AI? [PROBE FOR DETAILS]

Have you noticed the AI generated summaries Google sometimes displays in search results, and Amazon now displays at the start of its product reviews? [PROMPT WITH SHOWCARD IF REQUIRED]

If so, do you pay attention to these? Do you trust them? Are they useful?

If not, would you find something like this useful? Would you trust it?

Financial issues

Have you noticed any increases in the cost of your media and communications services (e.g. mobile, broadband costs, subscriptions to streaming services)?

Has this had any impact on which services you choose to subscribe to?

[WHERE RELEVANT] How have you replaced any services you no longer subscribe to?

To what extent have you been using the media, apps and the internet to help you save money (e.g price comparison websites, apps for special deals, etc.)?

Television: overview

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, ITVX, 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, when you're watching, or who you're watching with? [PROBE FOR DETAILS – E.G. ARE THEY MORE LIKELY TO GO TO 'REGULAR' TV FOR SPECIFIC TYPES OF PROGRAMME SUCH AS ENTERTAINMENT SHOWS, OR WHEN THEY ARE SITTING DOWN AS A FAMILY?]

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

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?

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?

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

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, ITVX etc.)? Do you watch them more or less than last year?

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

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

[THOSE USING ITVX AND/OR CHANNEL 4 ONLY] Do you pay a subscription to avoid the adverts on ITVX or the Channel 4 app? Would you consider doing so?

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

Do you (still) pay for a TV licence?

How do you feel about paying for the TV licence?

Have you considered stopping your TV licence? Why (not)?

Coverage of major events

Several major events took place this year – the General Election and, in sport, Euro 2024 and the Olympic Games and Paralympics. Thinking about the media coverage of these...

How did you follow the coverage of these (e.g. TV, radio, online – if at all), how closely and from which sources (BBC/ITV/Channel 4 vs other providers)?

How well did you think they were covered (compared to previous similar events)?

Radio and other audio content

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 listen to (or watch) podcasts these days?

[THOSE WHO CONSUME PODCASTS] Which podcasts do you listen to or watch? [PROBE FOR DETAILS]

Are you listening to more or less than before? [PROBE WITH PREVIOUS NEW LISTENERS TO SEE IF THE NOVELTY HAS WORN OFF AT ALL]

How do you come across new podcasts to try?

What draws you to particular podcasts?

Have these podcasts replaced another type of audio (e.g. listening to the radio) or another activity? [PROBE FOR DETAILS]

Do you trust the presenters of these podcasts more or less than presenters on radio and TV? Why?

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.]

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

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

Have you experienced any issues with trying to do routine tasks electronically or via dedicated apps? [PROMPT IF NECESSARY WITH THE EXAMPLES OF PAYING FOR PARKING AND BUYING TRAVEL TICKETS]

Are there things you'd prefer not to do online? [PROMPT IF NECESSARY WITH THE EXAMPLES OF BANKING AND ACCESSING HEALTH SERVICES]

Have you suffered any negative consequences as a result of this?

eDemocracy

Have you used the internet or apps in the last 12 months to access or to contact government or other public services, for example...

Applying for a driving licence, passport or other paperwork?

Submitting a tax return?

Looking up information about benefits or pensions?

Booking or conducting a doctor's or hospital appointment?

Looking up health information from the NHS?

Contacting your local council?

Looking up information about local services such as bin collections?

[IN EACH RELEVANT CASE...]

What was your experience like? [PROBE: WAS IT USER-FRIENDLY? WERE THEY ABLE TO ACHIEVE WHAT THEY WANTED?]

Is this something you would normally do “offline”? If so, were there any advantages and/or drawbacks in moving from offline to online?

[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?

Social media

How has your use of social media (Facebook, Twitter/X, 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?

How often do you look at social media? Do you look at certain platforms more than others, or to find different kinds of content? Why is this? [PROBE ON E.G. PERSONAL PREFERENCE VS ABILITY TO ACCESS SPECIFIC SOCIAL GROUPS]

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” or experts in a specific field? 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?

[WHERE RELEVANT] Who would you consider to be the influencers or experts you follow most closely? [PROBE FOR DETAILS]

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]

What kind of content do you post (or share) on social media (e.g. photos, videos, comments)?

Do you post (or share content) more or less than you did last year?

What would prompt you to share news or information online? [PROBE FOR EXAMPLES]

How do you know that what you are sharing is true? Does it matter?

Do you ever check the information before you share it? (If so, how?)

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 ever post video content to YouTube, TikTok, etc.? [PROBE FOR DETAILS]

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 use YouTube (or TikTok, etc.) to learn things, or to develop new skills? [PROBE FOR EXAMPLES]

Do you prefer to learn from watching a video or (for example) reading an article on a webpage? Why?

In what circumstances would you use YouTube (or TikTok, etc.) to search for information or instructions, or would you always use a search engine like Google?

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?

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?

People have come up with a number of ideas to help protect young people from harmful content (such as restricting access to social media or mobile phones for everyone under a certain age, and banning mobile phones in schools).

Do you think any or all of these are a good idea? [PROBE FOR DETAILS]

What do you think the impact would be?

[PARENTS ONLY] How do you think your child would react to this kind of rule?

There has also been discussion of the media's safeguarding responsibilities towards people who are in the media spotlight, such as individuals featured in news stories, or contestants in reality TV shows (e.g. Strictly Come Dancing).

Are you aware of the discussion around these issues?

To what extent (if at all) do you have concerns about how the media treats such individuals?

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?

Has your attitude changed at all in the last year? If so, how and why?

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?

What, if any, precautions do you take about posting photos (including profile pictures) on social media? [PROBE FOR DETAILS]

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?

Have you received any "scam" emails, texts or phone calls in the past year, for example from people pretending to be your bank, Inland Revenue, a retailer or delivery company, 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?

[THOSE WHO HAVE BEEN VICTIMS OF SCAMS IN PREVIOUS YEARS] Has being caught out previously made you behave any differently, or changed the way you think about privacy and security?

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

How often do you play games (either on your computer, phone, tablet or on a games console)? [PROBE FOR DETAILS OF WHICH PLATFORMS ARE USED FOR GAMING] Has this changed in the last year?

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)?

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

News usage and attitudes

Are you more or less interested in news than you were this time last year? Why?

How are you accessing news these days? How has this changed at all in the past year?

What would you consider to be your main sources of news nowadays? [PROBE ON EXTENT TO WHICH PEOPLE USE MAINSTREAM VS OTHER NEWS OUTLETS]

Are there any that you trust more or less?

Do you think some are more impartial than others? Do some have a particular viewpoint (and does that matter)?

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

Do you access any news via social media or video sharing sites? If so, which platforms (e.g. Facebook, Instagram, Twitter/X, TikTok, YouTube)? [PROBE FOR DETAILS]

[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 you 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 your feed?

When you see news on social media, are you aware of the original source of the news (e.g. BBC, Mail Online, GB News, Huffington Post etc.)? [PROBE FOR DETAILS]

Are there certain sources that you trust more than others? Do you ever check a news story by looking at another source?

Do you ever use social media to look for details about news stories that are missing from the mainstream coverage? [PROBE FOR DETAILS]

[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?

What type of local news stories do you see, and how do these make you feel (e.g. more connected to your local area, nervous about local crime and anti-social behaviour, etc.)?

Do you feel that your experiences and views are reflected in the way in which news is covered by the mainstream media? [PROBE FOR DETAILS]

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

Have you seen anything in the past year that you would consider to be "misinformation" or "fake news"? 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]

General Election 2024

Did you vote in the 2024 General Election? Why (not)?

What sources of information did you use to help you decide how to vote (or not to vote)?

Were there particular channels, individuals or other sources of information whose voices you particularly listened to, or trusted, about the choices on offer at the General Election?

And were there any you were particularly mistrustful of?

Did you post or share any content related to the election(e.g. on social media)? [PROBE FOR DETAILS]

20 years of Adults' Media Lives

Thinking back to when you joined the study in [YEAR], how has your life changed?

How has your media behaviour changed? How does an evening at home now compare to an evening at home in [YEAR]?

How has your attitude towards the internet and mobile technology changed?

How has the way in which you consume news changed?

And what hasn't changed for you? What are you still doing that you were doing in [YEAR]?

Which development in electronic media and media technology do you think has had the biggest impact? And how has this affected your life?

If you could go back in time to [YEAR], what media/tech advice would you give yourself and why?

If we fast-forward 10 years from now, what do you think will have changed in the world of media?