Adults' Media Use and Attitudes Report

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Welsh language summary available

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Section

Foreword

Ofcom has had duties to promote and research media literacy since it was established in 2003. We define media literacy as being the ability to use, understand and create media and communications in a variety of contexts, including through online services. Under the Online Safety Act 2023, we now have specific duties to heighten the public's awareness and understanding of ways in which they can protect themselves and others when using regulated services, in particular by helping them to deal with the areas of misinformation and disinformation, content that disproportionately affects particular groups, including women and girls, content of democratic importance, and how people's personal data is being used.

Ofcom's Making Sense of Media (MSOM) programme fulfils these duties through engagement with the wider media literacy sector, establishing best-practice principles, commissioning pilot initiatives targeting underserved groups, promoting a common approach to the evaluation of initiatives, and undertaking topic-focused research to expand the evidence base.

Our tracker studies – our Adults' and Children's Media Lives qualitative research projects, and our Media Literacy Trackers – are long-established, providing rich insights into the ways in which people's media use, attitudes and understanding have changed over time. This year, we close our reports with an exploration of some of the key changes that our surveys show since 2005, to illustrate how media use and attitudes have evolved.

Our tracker questions span a range of issues, from take-up and use of different types of online platform and service, through to people's attitudes, experiences, and beliefs about an array of media. We focus on people's critical understanding, as such skills are becoming increasingly important in a world where there is increasing uncertainty about what is true and what is false. We ask for the first time in this report about people's understanding and use of Artificial Intelligence (AI). We also ask about the extent to which people are using mainstream or other sources of news. We paint a picture of the range of ways in which people deal with their personal online worlds. And we ask about benefits and concerns: both the positive aspects of being online and the extent to which people encounter problematic material and feel able to keep themselves safe online.

As in all our reports, we provide detail about different types of UK adults – highlighting age, socio-economic background and gender wherever it is useful or possible to do so. And we have much more material accessible in our interactive report and data tables.

Being media literate isn't always aligned to positive and socially beneficial outcomes – there are also 'bad actors' who display expert media literacy skills. Our MSOM research this year has highlighted some of these issues, as well as showing how media literacy can be variable depending on the individual circumstances a person finds themselves in.

Despite this, it is increasingly important that adults across the UK adopt an appropriate range and depth of media literate attitudes and behaviours, to enable them to have a positive, active online experience, as well as helping them to navigate and avoid potential harms.

Overview

Key findings

Online behaviours and communications

- **Use of the internet has broadened for some users**: in 2023 about one in five (19%) online adults claim to have used many websites they had not used before, up from 16% in 2022. And more adults are using the internet in 2023 for banking and bills, as well as for some Government or public services.
- **The popularity of social media platforms varies considerably by age**: overall, social media users were most likely to describe Facebook as their 'main' social media site or app (48%), but this was driven by its significant popularity among older social media users. TikTok, Snapchat and Instagram were all more popular with younger social media users.
- **There has been a decrease in the proportion of adults playing video games**: about half (52%) of adults said they played video games in 2023, down from 56% in 2022 and 60% in 2021. Drivers of this decline include fewer 25-44s gaming, and reduced use of traditional games consoles, which only about a fifth of adults claim to have used for gaming, compared to three in ten in 2021.

Online attitudes and wellbeing

- **Compared to last year, more online communication platform users[1] believe that using these sites is positive overall for their mental health;** although still a minority of users,[2] four in ten (39%) now agree that online communication platforms are positive overall for their mental health, compared to 35% in 2022. Similarly, in 2023 more users (37%) said these apps or sites made them feel better about themselves than in 2022 (32%).
- **Additionally, more users agree that the benefits of these apps or sites outweigh the risks than in 2022** (56% vs 52% in 2022). All age groups, except 65+, are more likely to believe that the benefits outweigh the risks.
- **However, a third of users feel that people are often cruel or unkind to each other on online communications platforms**: this is consistent with 2022 and is more likely to be the case for male users and those aged 16-34. Interestingly, these two groups are also more likely to feel that internet users should be able to say what they like even if it is hurtful or controversial.

[1] 'Online communication platform' is a blanket term to encompass four kinds of site/app: 1 Apps/sites used to send messages, chat or make voice or video calls, 2. Video-sharing platforms, 3. Social media apps or sites, 4. Live streaming apps/sites used to watch or post content.
[2] From now on we will use the term 'users' when referring to online communication platform users.

- **More adults are comfortable with their social media screentime in 2023**: more than two-thirds (68%) of social media users said they were comfortable with the amount of time they spent on social media, up from 65% in 2022. However, there are some significant disparities by age; nearly half (48%) of 16-24s said they spent too long on social media, compared to just 8% of those aged 65+.

Trust and security

- **Three-quarters (74%) of adults claim to have heard of AI but less than a quarter (23%) have used it:** Many *Adults' Media Lives* participants viewed AI as a threat either to jobs, their personal safety or even to national security, although those who had experience of using it tended to have more neutral or positive views.
- **Adults aware of AI are more likely to trust an article written by a human than one that is AI-generated, but confidence in identifying AI content online is low**: half of adults aware of AI said they would trust an article written by a human more, compared to just 14% who would trust an AI-generated article more, but only 27% were confident in recognising it.
- **Just under half (45%) of users claim to have seen a deliberately untrue or misleading story on social media in the past year**: four in ten of these did not take any action as a result, while some actions, such as sharing the article to let their followers know it was untrue (done by 14%), might actually risk spreading it further.
- **A minority remain unaware of some of the basics of online architecture**: about one in ten internet users are unaware or unsure of any of the methods that companies use to collect personal information online, and about one in five are unaware of the use of algorithms to tailor what people see online.
- **A quarter of adults who bank or pay bills online admit to using the same passwords multiple times**. Plus, only about two-thirds (65%) of internet users claim to use 'strong' passwords and this is least likely among those aged 16-24, with only half using them.

Critical evaluation of online information

- **Younger adults are more likely to be confident, but not able to respond appropriately, to a scam email**: confidence in recognising suspicious emails or texts is high, at 86% of internet users, but when presented with an example scenario, a minority were not able to spot the tell-tale signs of a scam email. Younger adults aged 16-24 were more confident than average that they could identify scam emails but in practice were less likely to be able to identify them, and therefore are more likely to be at risk.
- **Conversely, older adults are less likely to recognise a fake social media profile**: eight in ten social media users felt confident in judging whether online content was true or false. When presented with a mock-up of a 'fake' social media profile, a similar proportion (77%) correctly identified the profile as not genuine, but this was less likely among those aged 65+.
- **Less than half (47%) of search engine users are confident and able to recognise advertising in search engine results**: confidence in recognising online advertising was high, at 85% of online adults, but ability to identify it in practice was much lower. Younger adults were less likely than average to correctly identify sponsored links in search engine results.

Digital exclusion and smartphone use

- **The proportion of households without internet access has remained unchanged since 2021**: 6% of UK adults do not have access to the internet at home, a figure that has remained stable ever since an uplift in household internet access levels during the first year of the Covid-19 pandemic. This is more likely among those aged 75+ (29%) and those in a DE household[3] (12%).
- **Just over half (52%) of those who do not go online at home get someone else to use the internet for them**: the most common reasons for this proxy internet use were online shopping and accessing health services.
- **Almost a fifth (17%) of adult internet users only go online using a smartphone**: this is more common among women (20%) and those in DE households (31%). Almost three in ten (29%) smartphone-only internet users said they had ever felt disadvantaged by this.

Methodology

This report draws its data mainly from our quantitative Adults' Media Literacy Tracker surveys, and discusses media use, attitudes and understanding among UK adults aged 16 or over. More detail, including additional demographic analysis and responses to the full set of survey questions, can be found in the accompanying interactive report and data tables. A more detailed description of the data collection and analysis process for these studies can be found in the technical report, published alongside the data tables.

To support us in providing an over-arching narrative on the key themes of adults' media experience in 2023, this report also draws on our Adults' Media Lives research. This is a qualitative, longitudinal, ethnographic project which has been running since 2005. The research follows 20 participants over time – with 12 of them having been in the study for at least 16 years – interviewing them at home to understand their relationship with digital media. The latest interviews of up to 90 minutes were mostly conducted face-to-face in their homes, with four interviews being held over Zoom.

The Adults' Media Literacy Tracker comprises three surveys: the core survey, online behaviours and attitudes, and online knowledge and understanding. As in 2022, the latter two surveys were conducted through an online panel, and the core survey was conducted through a mix of online panel and face-to-face interviews.

[3] A person's socio-economic status is based on the type of work they do, or what they used to do if they are retired. AB: higher and intermediate managerial, administrative, professional occupations; C1: supervisory, clerical and junior managerial, administrative, professional occupations; C2: skilled manual occupations; DE: semi-skilled and unskilled manual occupations, unemployed and lowest-grade occupations.

Our surveys sought to gauge UK internet users' opinions on a range of aspects about being online. The findings reflect general consumer attitudes. They do not necessarily reflect the views of Ofcom, including in relation to our Online Safety duties.

Breadth of internet use

While most adults use the internet, breadth of internet use ranges widely

The vast majority of adults now have access to the internet at home (94%), and a similar proportion of adults claim to use the internet themselves at home or elsewhere (92%), remaining broadly in line with 2022. However, different adults use the internet for different reasons, and to greater and lesser extents. Understanding these different groups is important when it comes to assessing media literacy levels.

To help us to discuss different kinds of internet users in this report, we have categorised internet users into three groups based on the breadth of their use. 'Narrow' internet users are defined as those who have done 1-4 of the 13 online activities we asked about, 'medium' internet users have done 5-8 activities and 'broad' internet users have done 9-13 of the activities.[4] In our latest research, 27% of internet users were defined as 'narrow', 37% as 'medium' and 33% as 'broad'. This is largely in line with last year.

[4] The 13 activities we ask about are: 1. Online banking or paying bills. 2. Paying for council tax or another local council service. 3. Looking for public services information on Government sites. 4. Finding information for work/ business/ school/ college/ university. 5. Looking or applying for jobs. 6. Finding information for leisure time. 7. Completing Government processes. 8. Signing a petition or using a campaigning website. 9. Using streamed audio services. 10. Listening to live, catch-up or on-demand radio through a website or app. 11. Watching TV programmes/ films/ content. 12. Watching or posting live stream videos. 13. Playing games online. This is not an exhaustive list of online activities, but this selection was found to be the most discriminating in determining breadth of use, from an initial longer list of activities.

There are demographic differences among the categories of internet users: narrow internet users are more likely to be aged 65+ and to be in social group C2DE. Broad users, meanwhile, are more likely to be aged 25-44 and to be in social group ABC1.

It is also important to consider the small minority of UK adults who do not use the internet. We will discuss the topic of digital exclusion later in the report.

Summary of demographic analysis

Age

Use
Younger adults are more likely to use a wider range of online communications platforms. The average number of different online communication platforms used by 16-24-year-old internet users is 8.7 compared to only 3.5 among those aged 65+. Security measures taken online differ by age group. Younger internet users, or their households, are more likely to use VPNs and biometric identification measures, while older adults or their households are more likely to use anti-virus software.

Attitudes
Younger adults generally feel more positively about some of the benefits of social media; for instance they are more likely to believe that social media is generally positive for mental health or makes them feel better about themselves. However, they are also more likely to feel that there is pressure to be popular and that find people are more frequently cruel or unkind to each other on these apps or sites. In addition, they are more likely to feel that they spend too much screen time on social media and video sharing platforms. Older adults are less likely to use or trust AI.

Understanding
Younger internet users are generally more likely to be confident in their online skills. However, this does not always match up with ability. Older internet users are better at responding appropriately to email scams and recognising advertising on search engines, while 16-35s who use social media are the best at identifying a fake social media profile. Different age groups also have different areas of understanding about algorithms. Older online adults are more likely to know cookies are used to collect personal data, but younger online adults are more likely to be aware of how personal data is used to tailor user experiences online.

Socio-economic group

Use
Adults in AB households are most likely to use the internet at home (96%), while those in DE households are the least likely (81%). There is a similar pattern for breadth of internet use; internet users in C2DE households are more likely than average to be narrow internet users and those in ABC1 households are more likely to be broad internet users. The only online communication platform that C2DE households are more likely than ABC1 households to use is Facebook.

Attitudes

The biggest attitudinal difference between households in different socio-economic groups is trust in mainstream news. While only 10% of those in AB households claim not to use mainstream news sources, this rises to 28% in DE households. However, on the vast majority of attitude statements we asked about, there was little difference in the views of adults in ABC1 and C2DE households – including on a wide variety of topics ranging from freedom of speech online to trust in AI.

Understanding

Those in ABC1 households are more likely to be confident and able across all of the five online skills scenarios than those in C2DE households, including identifying a fake social media profile and responding correctly to a scam email. A higher proportion of adults in ABC1 households are both confident and able to recognise advertising online; the biggest difference between the ability of ABC1 and C2DE social media users is their recognition of paid partnerships on social media.

Gender

Use

Men and women are very similar in terms of their breadth of internet use, although men are more likely to go online via a laptop, desktop computer or games console, while women are more likely to go online via a smartphone. Women are also more likely to be smartphone-only internet users. There are also some differences in online communications platform use, with men more likely to use YouTube and X, and women more likely to use WhatsApp, Facebook, TikTok, Instagram and FaceTime.

Attitudes

Men are more likely to believe that the benefits of using online communications platforms outweigh the risks, while women are more likely to agree that using them helps them keep in touch with family and friends. However, the biggest difference in attitudes relates to freedom of speech online; 39% of men who go online agree it is important that people can say what they want online even if it is controversial or hurtful, compared to just 27% of women.

Understanding

Women and men have broadly similar abilities regarding the online skills scenarios we presented to respondents, although men have much higher confidence in their abilities. This means that more men fall into the 'confident but not able' category in four of the five scenarios, including the spam email, the fake social media profile and the sponsored search engine results. Men aware of AI are also more likely than women to feel confident in recognising AI-generated content (33% vs 22%), which may be partly explained by the fact that men are more likely to use it themselves.

Nations

Use

Home internet access and use is similar across all four UK nations. Adults in Northern Ireland are more likely than the UK overall to use a broader range of some types of online communications platforms, using an average of 2.8 apps/sites to watch videos and 3.9 for messaging and calling, compared to UK averages of 2.4 and 3.6 respectively.

Attitudes
Although quite similar across England, Wales and Scotland, attitudes in Northern Ireland are often slightly different. Adult internet users in Northern Ireland are less likely than the UK overall to agree that people should have the right to hide their identity online, and are more likely to disagree with the idea that people should be able to say what they like online even if it is hurtful to others. While adults in Northern Ireland who use online communications platforms are more likely to disagree that online communications platforms are good overall for mental health, they are also more likely than the UK overall to believe that their benefits outweigh their risks.

Understanding
Adults who go online in Scotland are more likely than the UK overall to be confident and able in recognising scam emails, while adults in Northern Ireland are more likely to be not confident and not able. Adult search engine users in Northern Ireland are also more likely to be not confident and not able in identifying sponsored links on search engines. Adults aware of AI in Wales feel less confident in being able to recognise AI-generated content online.

Breadth of internet use

Use
By definition, narrow internet users use the internet for fewer activities than broad internet users. Broad internet users also use a much wider range of online communications platforms than narrow users. For example, while broad internet users use an average of 5.0 apps/sites for messaging and calling, narrow users use 2.2.

Attitudes
While there are clear differences between narrow and broad internet users in terms of their use and understanding of the internet, these groups are similar in terms of their overall attitudes to being online. This includes similar proportions agreeing that internet users must be protected from inappropriate or offensive content. However, there are some differences. Broad internet users are far more likely to believe that overall, the benefits of being online outweigh the risks, and to say that being online has helped them to learn a new skill.

Understanding
Narrow internet users are both less confident and show less ability in all five of the online skills scenarios we set respondents. For example, only 34% of narrow internet users who use search engines are confident and able in recognising sponsored search engine results, compared to 55% of broad internet users.

Online behaviours and communications

Websites and internet services

There are some signs of internet use broadening

The internet can offer convenient ways for people to manage their lives, money, and health. More online adults are using the internet for banking and bills (81%), to pay their council tax or other council services (52%) and to look for public services information on Government sites (62%) than in 2022. All age groups, including those aged 65+, now say they prefer to check their bank balance online, rather than in-person or through paper statements.

Several *Adults' Media Lives* participants described using an increasingly wide range of task-specific apps to support their needs and hobbies, including healthcare, travel, banking and money management, as well as specific interests such as sport, gambling and fitness.

> "I'm a member of BUPA, so all my doctors and stuff is online nowadays. If we need an appointment, we go through one of their apps, we'll see a doctor online and show them whatever we need to show them. I don't know how great it is, but it's a quick way of getting things done. Train tickets… they seem to be cheaper online, so we tend to purchase online and then go down to the station to pick them up, or we'll just use a barcode."
>
> Female, 46, PA, Woking

A fifth of internet users (19%) claim to have used 'lots' of websites in the past 12 months that they had not used before, compared to 16% in 2022. Although using new websites can be seen as positive, as it indicates confidence online and increasing use of what the internet has to offer, it is also important to consider that unverified websites may pose risks. Those more likely to use lots of new websites include those aged 16-34, who are also the age group most likely to believe that if a website has been listed by a search engine, it will contain accurate and unbiased information.

Adults also used the internet in more places outside the home in 2023 than in 2022. This includes more adults using the internet on public transport (29% vs 25%) and in gyms, leisure centres or sports grounds (19% vs 15%). This may include adults using practical tools such as maps and navigation, or for entertainment purposes such as streaming videos or music. Ninety-four per cent of adults aged 16-24 now use the internet both in the home and elsewhere, compared to 89% in 2022.

Use of online communication platforms

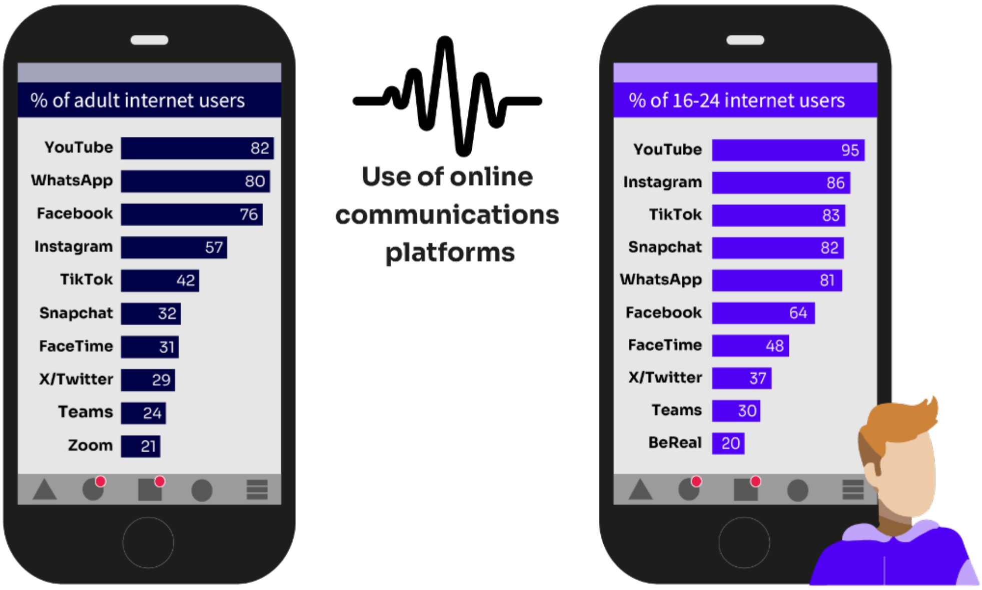
Online communication platforms continue to play a key role in our daily lives, and use among adult internet users is near-universal at 99%. As mentioned earlier in the report, 'online communication platforms' refers to four categories of use: using apps or sites to send messages, chat or make voice or video calls (carried out by 95% of adult internet users); watching/uploading content on video-sharing platforms (91%); using social media apps or sites (89%); and using live-streaming apps or sites to view/share content (63%). We will use the term 'users' when referring to online communication platform users.

While the use of these platforms is widespread, there are differences in use between different age groups. For example, 60% of all adult internet users engage in all of the four categories of platform use, compared to 87% for 16-24-year-olds and just 26% of those aged 65+.

The user base for the well-established social media and video-sharing platforms remains high

Across the four categories of online communication platforms, YouTube was the most popular, with 82% of adult internet users reporting having used the platform, a slight increase since 2022 (80%). This was followed by WhatsApp (80%), Facebook (76%) and Instagram (57%); with these four platforms being the only ones used by a majority of adult internet users.

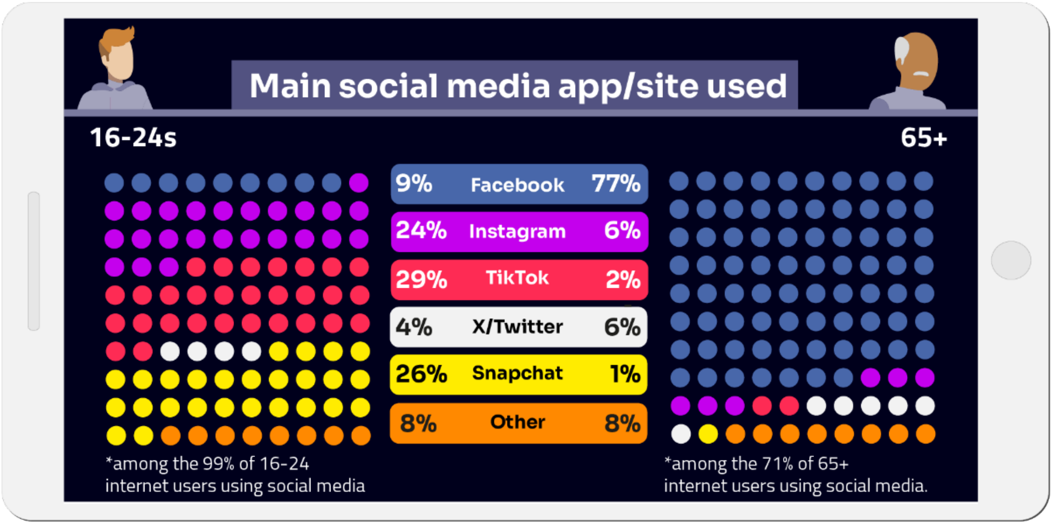
YouTube, WhatsApp and Facebook continue to be the most able to attract users from across all age groups, and are the most popular with older adults. While in general, communication platforms are less used by older age groups, YouTube is used by 65% of adult internet users aged 65+ and Facebook is used by 66%. But despite the overall popularity of Facebook it is used by only 64% of 16-24-year-olds, lower than the average across all age groups. There is a larger variation by age for other platforms such as Instagram, which is used by 86% of 16-24-year-olds but only 21% of those aged 65+.



The popularity of social media platforms varies considerably by age

Although overall, social media users were most likely to describe Facebook as their 'main' social media site or app (48%), this fell to 9% for those aged 16-24, steadily rising across each age category to reach 77% among those aged 65+. In contrast, Instagram, TikTok and Snapchat were all more popular with younger users. As in 2022, 16-24-year-olds most commonly identified either TikTok

(29%) or Snapchat (26%) as their top platform, while Instagram was the most popular among 25-34s, with about a third (34%) describing it as their main social media platform.



In 2022, BeReal – an app which allows users to post a photo once a day at a random time specified by the platform – had considerable growth in uptake. This was greatest among internet users aged 16-24, whose use of the app rose from 9% in spring 2022 to 22% in autumn 2022. But this rate of growth was not maintained, with use among 16-24s plateauing to 20% in 2023. There is also very little take-up across other age groups; the next highest level of use was 6% among 25-34-year-olds.

This was echoed in the *Adults' Media Lives* study, where the uptake seen among some younger participants in 2022 was reversed, with either decreased use or cessation in 2023.

> "I still have it and I still do use it. But the novelty has sort of worn off of it now."
>
> Female, 23, Nurse, Belfast

Fewer social media users have multiple accounts on the same platform than in 2022

There has been a slight decline in the number of social media or video site users who have more than one profile on the same platform, from 22% in 2022 to 20% in 2023. This reverses the increase seen from 2021 to 2022. Those aged 16-24 were the most likely to have multiple profiles (48%), and women (21%) were a little more likely than men (19%) to have more than one profile on any social media or video site.

Almost half (47%) of respondents with more than one profile on the same site or app do this on Instagram; the next most common platforms are YouTube (26%), Facebook (26%) and TikTok (23%). The most popular reasons given for this were having an additional profile dedicated to a hobby such as cooking or reading (36%) or having a separate account for business purposes (30%). Other reasons included having different accounts for sharing/ posting their own content and for following other people (28%), and having one account for their closest friends and another for a wider circle of friends (26%).

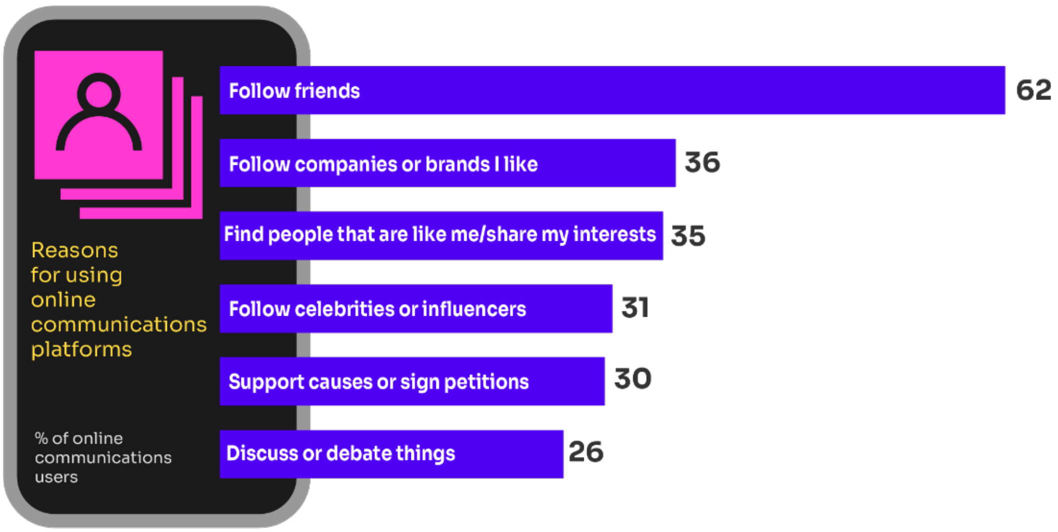
Internet users engage in a variety of activities on social media

In line with the previous year's findings, in 2023, 59% of those who use social media say they share, post or comment on these apps or sites. This is split between 25% who say they do this often, and 33% who do it sometimes. In terms of less active engagement, 22% say they usually just 'like' things and 18% tend to only read things.

Given that they use the greatest number of sites and apps, we might expect 16-24-year-olds to be the age group that is the most active on social media, but this is not the case. They are actually the group most likely to just 'like' things (27%) while those aged 25-34 are more likely to often share, post or comment (37%).

The most popular reported uses for social media were following friends (62%), following companies or brands (36%), finding people who are like them/share their interests (35%), and following celebrities or influencers (31%). Those aged 16-24 were most likely to follow celebrities or influencers (50%), while 25-34s (49%) and 35-44s (47%) were most likely to follow companies or brands.

Three in ten (30%) respondents use social media apps or sites to support causes or sign petitions, and about a quarter (26%) use social media for discussing or debating things, down from 28% in 2022. These activities are more popular among certain demographics; for example, 36% of 25-34-year-olds report using social media to support causes or sign petitions, and 32% of respondents in AB households use it for discussing or debating things. Using social media to support causes or sign petitions is more common among women than men (32% vs 28%), while debating and discussing is more popular with men than women (30% vs 22%).



WhatsApp remains the most-used service for messaging and calls

The most popular apps or sites for sending messages or making voice/video calls are WhatsApp – used by 80% of internet users – followed by Facebook Messenger (59%) and Instagram (39%).

However, the preferences of younger adults are notably distinct from other age groups and follow similar trends to the social media use highlighted above. Although WhatsApp is still the most commonly-used platform by 16-24-year-olds, at 81%, this is followed by Snapchat (73%) and Instagram (70%), while Facebook Messenger is used by only 48%.

The use of video-conferencing platforms Microsoft Teams (24%), Zoom (21%) and Skype (14%) has remained stable since 2022. This is likely to be because working from home has continued to be a widespread practice for many traditional office workers since the pandemic. For what is more likely to be personal use, video/voice calling through FaceTime has decreased from 34% in 2022 to 31% in 2023.

The large majority of internet users use video-sharing platforms although few upload their own content

Just over nine in ten (91%) adult internet users say they watch videos/clips online through any video-sharing platform. YouTube continues to be the most popular, used by 78%, followed by Facebook (inc. Facebook Gaming) at 47%, Instagram (43%) and TikTok (37%). Since 2022 there has been a slight decline in the use of Snapchat for watching videos, from 22% to 19% in 2023.

The use of most of these apps or sites varies by gender. For example, 83% of male internet users watch videos on YouTube compared to 74% of female internet users. However, the reverse is true for Instagram, which is more popular among women than men (47% vs 39%).

In terms of watching live video, 63% of internet users watch content on any live-streaming platform. This is more common among younger internet users, rising to 87% among those aged 16-24 compared to only 30% of over-64s.

Three in ten (31%) internet users say they have uploaded their own videos to video-sharing platforms; a slight increase since 2022 (28%). This is most common among 25-34-year-olds, of whom 50% say they have uploaded their own video content; this is followed by 45% of 16-24-year-olds. Only 8% of over-65s have uploaded videos they have made themselves. Men (34% vs 28% women) and those from ABC1 households (33% vs 27% C2DE) are also more likely to upload their own videos.

The most common reasons given for uploading video content were that 'it's fun' or 'helps pass the time', that it is 'a good way to keep in touch with people' and that it 'helps individuals to feel more creative'.

Gaming

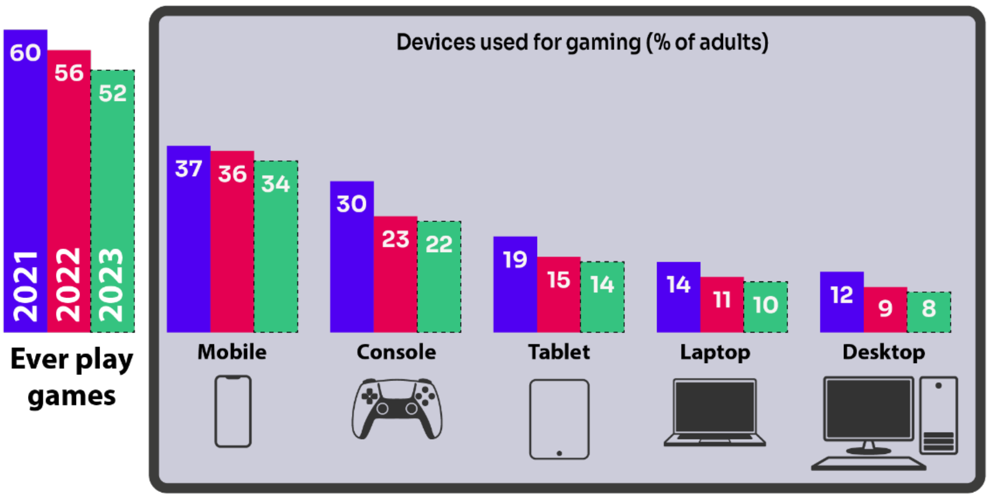
Fewer adults say they have played video games in 2023

About half (52%) of adults say they have played games at home or elsewhere, either online or offline, down from 56% in 2022 and 60% in 2021.[5] The age groups driving this decline most are 35-44s (73% in 2021 to 62% in 2023) and 25-34s (79% to 70%).

At a device level, the biggest driver of this reduced gaming population over the past two years is traditional games consoles, which only about a fifth (22%) of adults claim to have used for gaming, compared to three in ten in 2021. Mobile phones continue to be the most-used device for gaming, with a third (34%) of adults claiming to use them this way.

This decline in gaming overall corresponds with a decline in online gaming: 35% of adults this year claim to have gamed online, compared to 39% in 2021. Of those who do game online, two-thirds (66%) play against other people and the remainder only play against the games console or computer. Thirty-seven per cent of online gamers play games against strangers online, and this is more likely to be done by younger adults aged 16-24, and men.

Another interesting change since 2021 is that men are now no longer significantly more likely to game than women, with 53% of men and 51% of women gaming in 2023, compared to 63% and 56% respectively in 2021. Women are more likely to game on mobile phones and tablets, while men are more likely to game on games consoles and desktop computers. In terms of game styles, women are more likely to play puzzle or quiz games while men are more likely to play shooter, sports or action/adventure games.



[5] The Adults' Media Literacy Tracker Core survey in 2021 had a different methodology due to the Covid-19 pandemic. In 2023 and 2022, the Core survey combined face-to-face surveys with online surveys, while in 2021 the methodology was postal surveys. Any differences between 2021 and 2023 are therefore indicative only.

Online attitudes and wellbeing

Benefits of being online

Seven in ten internet users believe the benefits of being online outweigh the risks

We have already seen some of the benefits that being online can bring, such as communicating with others, and accessing a broad range of facilities such as banking and Government services. About seven in ten (71%) internet users agree that the benefits of being online outweigh the risks, a similar level to 2022, and just 8% disagreed. Men, and people in ABC1 households, are more likely than women and those in C2DE households to believe that the benefits outweigh the risks.

A similar proportion of internet users (72%) said that being online helped them to learn a new skill. An even higher proportion (77%) of adults agreed that being online helped them broaden their understanding or view of the world.

Some *Adults' Media Lives* participants talked about how technology is empowering them to make major life changes. One spoke about his medium-term aspiration to live abroad but continue to work in the UK; he has friends who already do this.

> "I think we've evolved… new tech and the flexible working that we've been able to implement post-pandemic are giving people a lot more options. And I think possibly when my daughter gets a little older, a bit more independent, I'm interested in living abroad."
>
> Male, 37, Fraud Analyst, Leeds

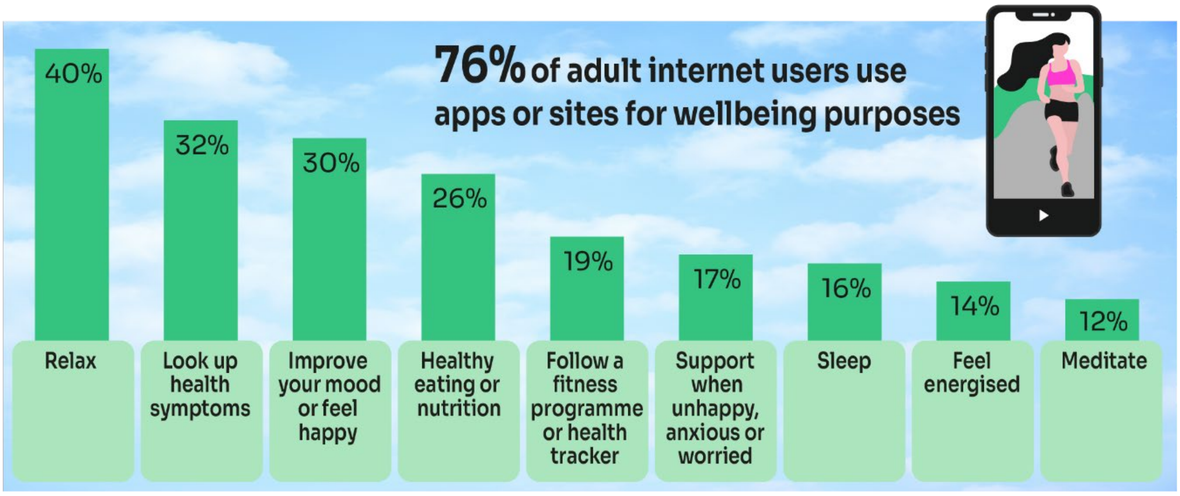
Social media and mental health

More users believe online communications platforms are positive for their mental health and for helping people to feel good about themselves than in 2022

Although still a minority, 37% of adult users said that these platforms make them feel better about themselves overall, up from 32% in 2022. Four in ten (39%) users agreed that online communication platforms are generally good for their mental health, up from 35% in 2022. Users more likely to believe this include those aged 25-34 (45%), 35-44 (46%), with children (46%) and in minority ethnic groups (48%).

The positive trends around online communications platforms and mental health are also seen in people's overall perceptions of the benefits of these apps or sites. Fifty-six per cent of users agreed that the benefits of these apps or sites outweighed the risks, up from the 52% who said this in 2022. Only 11% said they felt the felt the risks outweighed the benefits, while a third (33%) were unsure. All age groups, except those aged 65+, are more likely to believe that the benefits of social media outweigh the risks. Users in socio-economic group AB are more likely to believe that the benefits outweigh the risks (63%) than those in socio-economic group DE (45%).

Three-quarters (76%) of adults use apps or sites for wellbeing. This includes using sites or apps to relax (40%), to look up health symptoms (32%) or to 'improve your mood or feel happy' (30%).



However, a third of users feel that people are often cruel or unkind to each other on online communication platforms

While there is some movement in a positive direction around perceptions of online communication platforms and mental health, a large number of users still do not see things this way.

A third of users (32%) believe that people are cruel or unkind to one another on online communications platforms all or most of the time. This is consistent with 2022 and is more likely to be the case for male users and those aged 16-34. But interestingly, it is these two groups who are more likely to agree that it is important that people can say what they want online, even if it is controversial or hurtful to others.

Additionally, online communication platforms can be a place where people worry about how they are perceived by others. Almost half (48%) of users believe that there is pressure to be popular on these apps or sites, and again, this is more likely among adults aged 16-44.

Most participants in the *Adults' Media Lives* study felt they had not been exposed to harmful content in the past year. However, the conflict in Gaza, which was beginning to unfold during the fieldwork period, was recognised as being a potential source of very upsetting images and videos. Some participants were deliberately attempting to shield themselves from such content, but others, who often had strong feelings about the conflict, felt that they had a duty to inform themselves.

> "Obviously, what's happening in Gaza, there's been loads of that online. I think it's unfiltered, so I'm really careful with what I open. People share stuff and... I'm quite cautious with it because, you know, it's straight from someone's phone that's there, straight onto your

timeline… You don't know what you're going to open and what you're going to see. So, I actually try not to engage with it."

Female, 30, Solicitor, Edinburgh

Screen time

Younger adults are more likely to think they spend too much time on social media

Almost seven in ten (68%) social media users said they were comfortable with the amount of time they spent on social media, up from 65% in 2022. This compares to just under three in ten (28%) social media users who said they spent too long on social media. However, there are large differences by age group, with almost half (48%) of those aged 16-24 saying they spend too long on social media, compared to just 8% of those aged 65+. According to data derived from passive monitoring of adults' devices[6], Facebook users aged 45+ spend more time on average per day on the platform than 18-24-year-olds, but 18-24-year-olds spend more time per day on YouTube, Instagram, TikTok and Snapchat.

More than two-thirds (68%) of adult internet users say they have strategies for managing their online time and wellbeing: 27% of adults set aside time for themselves when they are not online (up from 25% in 2022), 26% of adults disable notifications on devices or use 'do not disturb', and 21% of adults have chosen not to take devices such as phones and tablets to bed with them. For their wellbeing, some adults choose to avoid particular apps: 22% of adults take deliberate breaks from social media apps (down from 25% in 2022), and 20% of adults claim to have deleted an app because they spent too much time on it (down from 23%).

Creativity

Younger adults are more likely to use the internet and social media for creative purposes

Adults who use social media are more likely to agree than to disagree that it makes them feel more creative (39% vs 23%). Those most likely to agree include adults aged 16-44 and those in socio-economic group AB. We have already seen that the most likely reason for having a second profile on social media was dedicating an account to a hobby, such as cooking, reading or photography, suggesting that some adults find social media a good place to promote or share their interests.

Two-thirds (66%) of internet users claimed to do one of the online creative activities we asked about. The most popular was following a 'how-to' tutorial to create or do something themselves (31%), followed by writing reviews about something they had bought, or somewhere they had visited (27%). More ambitious creative activities online included creating an online photobook or calendar (11%), setting up or managing their own website (8%), and writing a blog or article (7%). Adults aged 16-44 and those in social class AB were more likely to say they did at least one of these creative activities online.

[6] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.

Many participants in *Adults' Media Lives* reported extensive use of YouTube to find a wide range of content including 'how-to' videos and recipes that helped or inspired them in their offline activities.

> "In my job, I have to do a little bit less coaching, but I have to do a lot of coach mentorship and planning... So, I do watch a lot of YouTube videos, just to sort of give me ideas."
>
> Female, 23, Sports Coach, Warwick

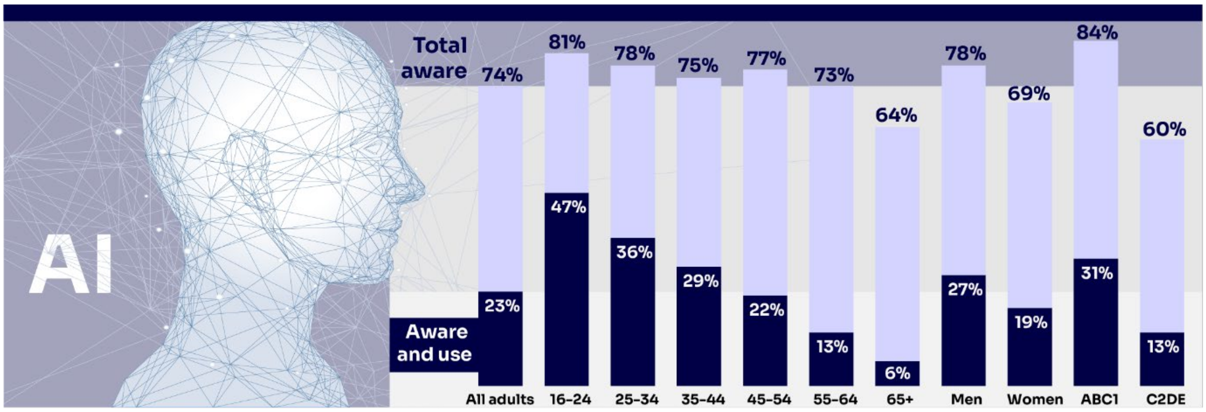
Trust and security

Artificial intelligence (AI)

Most adults have heard of AI, but few use or understand it

AI is one of the highest-profile recent technological developments, particularly as free public access is now available to sophisticated AI chatbots such as ChatGPT and Gemini. Although ChatGPT and Gemini (formerly Bard) only launched in November 2022 and March 2023 respectively, three-quarters (74%) of UK adults have now heard of this type of AI model, and awareness of them is high among all demographics, including 64% of those aged 65+.[7] However, this does mean that 26% of adults have never heard of AI, and this group is more likely to be made up of 'narrow' and less confident internet users.

However, there is still a significant gap between those who have merely heard of these chatbots, and those who claim to be familiar with them, or to have used them. Just 37% of UK adults claim to be 'familiar' with what AI models can be used for, and only 23% claim to have actually used them. Those more likely to have used them include users in socio-economic group AB (36%) and younger adults, especially those aged 16-24 (47%). Men (27%) are more likely than women to have used them (19%).



A third of AI users now use AI for work or school

Given how recently they have launched, it is perhaps unsurprising that the most likely reason for someone having used these chatbots is simply curiosity, with four in ten (41%) AI chatbot users having used them for this purpose. However, many also claim to have used them for work purposes (32%) or for education (30%). This means that among all UK adults, more than one in ten (12%) claim to have used AI models for work or study, and it is likely that this figure will grow rapidly.

Some *Adults' Media Lives* participants had used AI in the workplace or in their studies, and so they were more likely to be knowledgeable, and less likely to feel threatened by AI. A few had tried out generative AI tools themselves (primarily ChatGPT).

[7] Note: at time of fieldwork, Gemini was known as Bard and referenced as such in the questionnaire

"Microsoft Word has got an AI installed in it already, so I've been writing multiple risk assessment documents, and I noticed it has started finishing my sentences. And I was like, "Hmm!". I think this is just the beginning."

Male, 37, Fraud Analyst, Leeds

"I recently asked it to generate a three-day itinerary for Vienna, where I'm going on holiday tomorrow… And it came up with a brilliant sort of itinerary."

Male, 44, Web Officer, Cardiff

"I used it yesterday, I think, because I was making my LinkedIn profile. I asked them to create a bio for me but then I was like "This bio seems very… over the top, sort of like begging". And so, I asked my sisters, and they said "You know what? That's really good". So, then I was like "I'll just save it"."

Male, 19, Student, Birmingham

An AI article would be less trusted than one written by a human, but adults struggle to identify AI-generated content

We wanted to establish how much adults trust AI-generated content. We asked online adults to imagine they had read an article online which stated that it had been generated or written by AI, and to tell us whether they would trust that article more or less than one written by a person. While half of adults aware of AI said they would trust an article written by AI less, only 14% said they would trust an article written by AI more than one written by a human. Those who would trust an AI article more are far more likely to be young, including almost three in ten (28%) 16-24s. Those who use AI tools themselves are also more likely than those who do not do so to trust an AI article more than a human one (30% vs 7%).

Confidence in identifying AI-generated content online is low; just over a quarter (27%) of adults who have heard of AI consider themselves confident in recognising it, and over four in ten (41%) not confident. Confidence is higher among younger adults aged 16-24 (37%) or 25-34 (42%), men (33%) and those who use AI themselves (45%).

Consideration of AI-generated content does not seem to yet be part of most adults' everyday thought processes when using the internet. Just 37% of adults aware of AI 'ever' consider whether something written online might have been generated by AI, and just 16% consider it 'always' or 'often'. Similarly to confidence in identifying AI content, those more likely to consider whether content was generated by AI are adults aged 16-34, men and AI users.

In order to assess how effectively *Adults' Media Lives* participants were able to distinguish between AI-generated and real content, we presented them with three pieces of content. They were two images – a real but highly stylised promotional photo of the actress Margot Robbie for the film *Barbie*, an AI-generated image purporting to be a photo of Donald Trump's arrest, and a deep-fake video of Martin Lewis promoting an investment opportunity associated with Elon Musk.

In this controlled environment, most participants were able to successfully distinguish between the fake and real content. However, many of them were concerned over how realistic the fake content looked, and expressed doubt that they would be able to identify it as fake if they weren't thinking about it.

> "Let's say it was on my TV or my phone and I was watching it and I wasn't thinking about the possibility that it's AI. I probably wouldn't have passed any remarks on any of those images. I probably wouldn't have thought twice about it."
>
> Female, 23, Nurse, Belfast

Participants were most confident when they were able to make a judgement with some kind of contextual knowledge. For example, when judging the Martin Lewis video, most were aware that he does not endorse products, and that was the primary factor which helped them to decide that this particular video was fake. A few participants demonstrated some understanding of the limits of AI technology in image generation, particularly its ability to reproduce specific details.

> "I'd have to have a proper look at that and tell you, because it messes up with hands. One, two, three, four fingers. It doesn't look too bad. Yeah, I'd say that's probably real."
>
> Female, 50, Carer, Somerset

The image most likely to be identified incorrectly was the genuine, but stylised, image of Margot Robbie. This reflected a degree of confusion about where exactly the line is between Photoshop (or airbrushing, as it was often referred to) and generative AI.

> "Part of the issue is I think that a lot of images of celebrities are so airbrushed anyway, it's borderline impossible."
>
> Male, 27, Tutor, London

News and information

One in seven users claim to 'rarely' or 'never' consider the truthfulness of information they read on social media

With over two-thirds (68%) of adults now getting their news online,[8] we explored adults' ways of getting information online and validating what is true and what is not. While the majority of online adults claim to consider the truthfulness or accuracy of news they see on social media, there are still 15% of social media news users who say they rarely or never consider this. This is more likely to be the case for those in socio-economic group DE (22%).

Of those who do consider the truthfulness of the information at least some of the time, 91% say they make specific checks to verify the information. The most common technique is checking who posted the information to see if it is from a trustworthy source (51%), followed by looking at

[8] Ofcom News Consumption Survey 2023

comments to see what others have said (46%). A smaller number of social media news users go to specific fact-checking websites such as Full Fact (16%).

A few *Adults' Media Lives* participants spoke of using YouTube to access news events 'at source', in the form of first-hand accounts and live streams from conflict zones. They said they liked the idea of what purports to be real-world experience, apparently unmediated by any kind of editorial voice.

> "There is information everywhere and there's people everywhere posting their experiences of what's going on and how they are living. I think that is very important."
>
> Male, 37, Fraud Analyst, Leeds

> "The news that we're watching is people that have got cameras set up in Gaza at the minute. It's four different cameras set up on the TV and they're all different places. So, they're watching it all live. And one of the cameras did go off the other day, and the bloke did get killed. It's pretty horrific what's going on at the minute."
>
> Female, 50, Carer, Somerset

Just under half of users have seen a deliberately untrue or misleading news story

Having ways to validate the accuracy of news on social media is particularly important, given that 45% of adult users claim to have seen a deliberately untrue or misleading news story on social media in the past 12 months. This is consistent with the levels of misleading stories encountered in 2022. Those more likely to have encountered a misleading or untrue story are adults aged 16-44, men and those in socio-economic group AB.

Of those who had seen a misleading story, four in ten (41%) did not take any action as a result. The most common action taken was to report the story to the site/app, done by a third (34%) of those encountering misinformation. However, there is a risk that some actions help to spread fake news, rather than prevent it; 14% of adults said that they had shared a misleading story online to let their followers know it was incorrect or misleading.

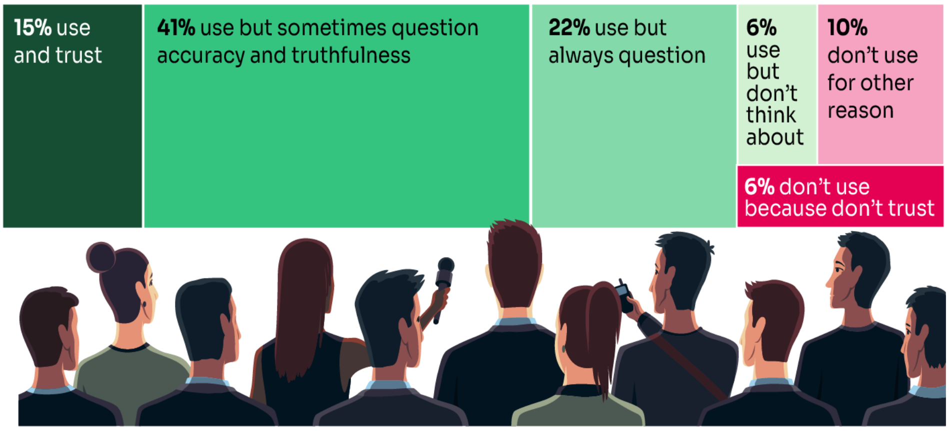
Three in ten online adults in socio-economic group DE avoid mainstream news

We were keen to understand the extent to which adults say they use mainstream news outlets, such as the major television or print news outlets, and the degree of trust or scepticism they have in them. Overall, 15% of adults say they use mainstream sources and always trust them to give accurate and truthful information. A further 6% say they use them and don't think about the truthfulness of the information.

However, it is more common for adults to at least sometimes question the information given to them by mainstream sources. Four in ten (41%) say they use mainstream sources but sometimes question the information, and a further 22% say they always question the information provided to them by mainstream sources. Men are more likely than women to use mainstream sources but to always question the information.

This leaves 16% of adults who say they do not use mainstream news outlets, and this is more likely among those in socio-economic group DE (28%). However, it is more common for adults to avoid mainstream news due to a lack of interest in news in general, or some other reason (10%), than specifically because they do not trust them to provide accurate information (6%).

Use of, and scrutiny of, mainstream media information



Among participants in the *Adults' Media Lives study,* there was a notable increase in claimed consumption of podcasts, including those produced outside the mainstream media. About two-thirds of participants reported listening to (or watching) some form of podcast. Participants are consuming content on a broad range of topics, including news and current affairs, entertainment, sport and fitness.

> "The Rest is Politics and Battleground Ukraine I listen to pretty religiously and pretty much every episode. They have two a week."
>
> Male, 27, Tutor, London

> "Podcasts? I listen to Live at Five, Filthyfellas, Joe Rogan – because they have a lot of fitness guys come on there as well, talking about different aspects of fitness and recovery, stuff like that."
>
> Male, 37, Fraud Analyst, Leeds

Personalisation and algorithms

Only about half of online adults are aware of personal data collection through social media accounts

About nine in ten (89%) online adults are aware of at least one method which companies use to collect information about them. However, awareness of each of these specific techniques is lower. Only 56% of online adults are aware of information collection through social media accounts, and 57% are aware of personal data collection when companies ask customers to register with a site or app and opt in or out of receiving further information. Knowledge of the use of cookies to collect information is the method most familiar to internet users, with over two-thirds (68%) aware of this.

Knowledge of cookies is higher among adults aged 55-64 (76%) or 65+ (74%) and much lower among adults aged 16-24 (51%).

Algorithms play an important role in the delivery of search results and news online, particularly on social media. One in five (19%) internet users remain unaware of apps and websites' use of algorithms to tailor what users are shown when they search online. Awareness levels for algorithms differ by demographic group; 27% of those aged 65+ who go online are unaware of algorithms, as are 28% of those in socio-economic group DE. This is an interesting finding, considering that those aged 65+ are more likely to be aware of cookies, and suggests that older adults may be more aware of specific data collection methods but less aware of what the personal data is actually being used for in terms of tailoring user experience.

Another issue relating to algorithms is adults not seeing any counter-attitudinal views and thereby entering an 'echo chamber'. Fifteen per cent of users claim to rarely see views that they disagree with on online communications platforms, and this is more likely for those aged 16-24 (20%). One in five (21%) users claim to often see views they disagree with.

Younger online adults are more likely to be happy for companies to collect and use their personal data

There is a lack of consensus on whether adult internet users are happy for apps and sites to use their personal information to tailor what is shown to them. While 31% of adults say they are happy for sites to do this, 36% are unhappy about it, while 31% are neither happy nor unhappy. Those aged 25-34 (43%) and those in socio-economic group AB (37%) are most likely to be happy with the use of algorithms to tailor their content. The group most likely to be unhappy with the collection of their personal information for this purpose are older adults aged 55+.

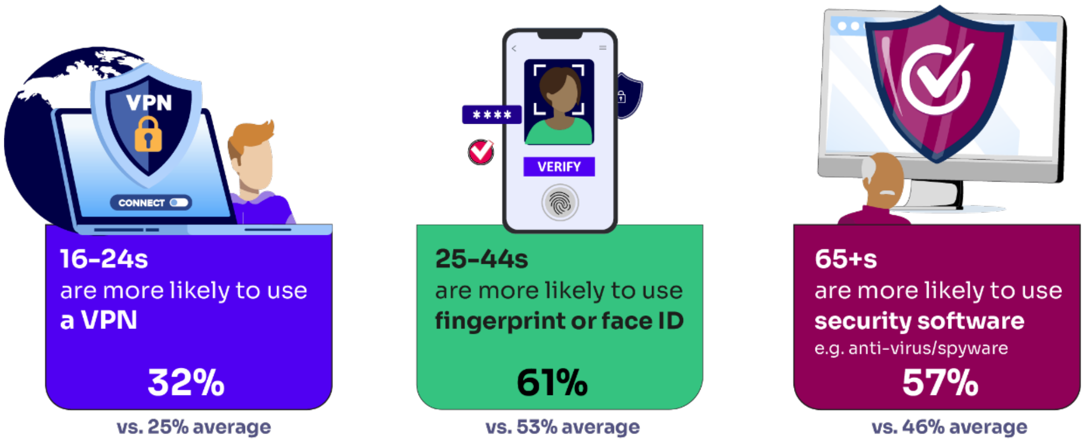
We asked users what they might see as acceptable trade-offs for allowing companies to collect and use their personal information. Adult internet users were most likely to say this was being able to opt out at any point, and the companies would stop using their data: 43% believed this was an acceptable trade-off. This is consistent with 2022. The other two top reasons also related to transparency and trust, with four in ten (41%) online adults saying companies would need to be clear about how their personal information was used, and a similar proportion saying that companies would need to reassure them that their personal information would not be shared with other companies. Younger adults are more likely to be happy to share their information in return for a reward, with a quarter (26%) of 16-34 year olds happy to share personal data to receive access to a free service such as a public wi-fi network, compared to just 7% of over-65s.

Online security

Many now take precautions for online security…

The specific security techniques used by different internet users or their households range widely. The most popular is the use of fingerprint or facial recognition technology to access devices or apps or to make a purchase, with over half (53%) of internet users doing this. This is a substantial increase since 2021, when only 43% of adult internet users claimed to use fingerprint or face ID. Other popular security measures include using security software such as anti-virus or anti-spyware packages (46%) and routinely backing up the information on devices (38%), neither of which have changed much in the past two years.

Adults of different ages are likely to use different precautions. Young adults aged 16-24 are more likely than average to use VPNs (32%), while adults aged 65+ are more likely to use anti-virus or anti-spyware software (57%) and adults aged 25-44 are more likely to use fingerprint or facial recognition (61%).



...but less vigilance is being observed with online purchases

We asked online adults what checks, if any, they made before entering credit or debit card details online. Only 63% said they check that they are familiar with the company or brand, slightly up since 2022 (60%). Slightly fewer (58%) said they check the site looks secure, such as having the padlock symbol or using ‘https’, and fewer still check whether there is a link to another reputable service such as PayPal (44%). Five per cent of online adults said they either didn’t know which checks they performed, or did not run any checks.

Older adult internet users are more likely to make specific checks before entering credit or debit card information online. Sixty-seven per cent of over-65s check that they are familiar with the company or brand, compared to 56% of 16-24s. Similarly, 64% of 55-64s say they check whether the site looks secure, compared to 47% of 16-24s.

A quarter of adults who bank or pay bills online admit to reusing passwords

Many adults who bank or pay bills online are still not using strong passwords online. Only two-thirds (65%) claim to use strong passwords, and a quarter admit to using the same password multiple times. The 16-24 age group are the least likely to use strong passwords, with half claiming to use them, compared to almost three-quarters (73%) of over-65s.

We also asked those who bank or pay bills online about the method they use to log into their accounts. The most common technique was logging in using fingerprint or face ID (39%), followed by entering the login details manually (35%). One in five usually used either a browser autofill function or a password manager. Adults aged 65+ are more likely than average to type in login details themselves, while adults aged 16-24 are more likely than average to use password managers such as LastPass.

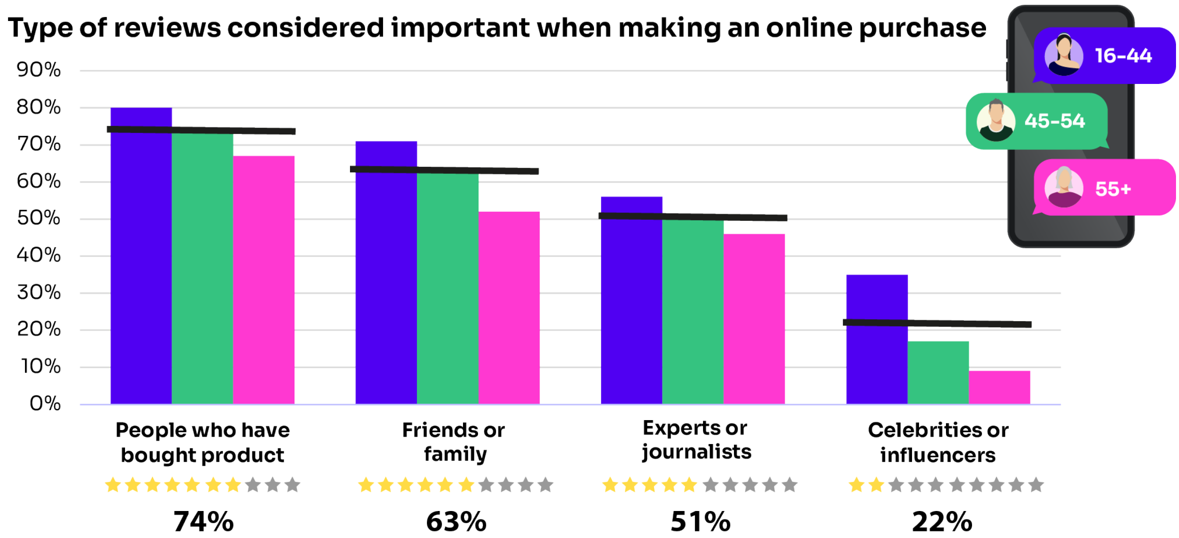
Reviews

Younger adults are more likely to consider reviews before making an online purchase

The vast majority of online adults now purchase products or services online (84%). Trust in the product or the seller is becoming an increasingly complex issue, as there are now many websites and apps that offer used items sold by members of the general public, such as eBay, Vinted and Depop. In addition, users are able to buy products and services directly through social media, using platforms such as Facebook Marketplace and Instagram Shopping.

When making an online purchase, adults who shop online are most likely to trust reviews from people who have previously bought the item; three-quarters (74%) consider these kinds of reviews important. This is followed by reviews of the item by friends and family (63% consider these important) and reviews by experts or journalists (51%). Of the four factors we asked about, the least important were reviews of the item by celebrities or influencers (22%).

However, there are some substantial differences by age group in the sources adults trust when making an online purchase. The most notable is the importance of reviews by celebrities or influencers – 38% of those aged 25-34 consider these important, compared to just 6% of those aged 65+. However, 16-44s tend to consider *all four kinds* of reviews more important than do those aged 55+. For example, while seven in ten (71%) 25-34-year-olds consider reviews by friends and family important when making a purchase, only half of 55-64s do. Women are also more likely than men to consider reviews from previous purchasers, and reviews from friends and family, important.



Many *Adults' Media Lives* participants have become more sceptical of online reviews and claim to pay less attention to online reviews when making their purchasing decisions. Sometimes this was driven by bad personal experiences with well-reviewed products and services. Others expressed more general scepticism about the provenance of these reviews, and a suspicion that companies might be ‘gaming’ the review sites.

> “We were royally ripped off. I found them looking through approved traders and things like that. They were on there and they had five stars and I read the reviews and all seemed legit. They had their own website. My daughter had a look at it and said “They’re stock photos, Mum. I've used that one for my photography GCSE portfolio. It's a picture of the roof of Llandough Hospital.” And I never twigged... Why would you?”
>
> Female, 46, Fundraising Manager, Cardiff

> “I don't believe half the reviews... It could be Tom, Dick or Harry that’s writing them... I don’t know. I don't believe them. It could be the companies themselves that are writing them.”
>
> Female, 79, Retired, Edinburgh

> “Yeah, I always type in “bad reviews”. That's the first thing I type in. “Bad reviews for such and such”. And if I find any, then I'm not going.”
>
> Female, 62, Unemployed, London

Critical evaluation of online information

Introduction

'Critical understanding' is a core element of media literacy. It allows users to understand, question and manage their media environment. This is important if they are to explore the benefits that the internet and other media can offer, while avoiding potential harms or risks.

Our research looks at confidence and the interaction it has with critical understanding. Confidence does not just follow from good media literacy skills, but intersects with it in a way which can either strengthen or undermine critical understanding. Someone whose confidence is not matched by ability in practice may be more likely to make mistakes, which could lead to harm. Conversely, someone who has good critical understanding skills but is not confident in them may not trust their own good judgement, which could lead them to feeling unsure or unsafe online.

An increasing proportion of internet users said they would seek help if stuck online, which is an encouraging trend for adults developing their online skills. The most popular solutions included looking online for help, or asking for help from a friend or family member. There was also an increase in the number of online adults saying they would look up 'how-to' videos on websites like YouTube or the BBC.

Scams

According to our Online Experiences Tracker, scams, fraud and phishing are the three most likely potential harms for adults to encounter online.[9] It is therefore important for internet users to feel confident in spotting scams, and when encountering one, have the knowledge to react to it in an appropriate way.

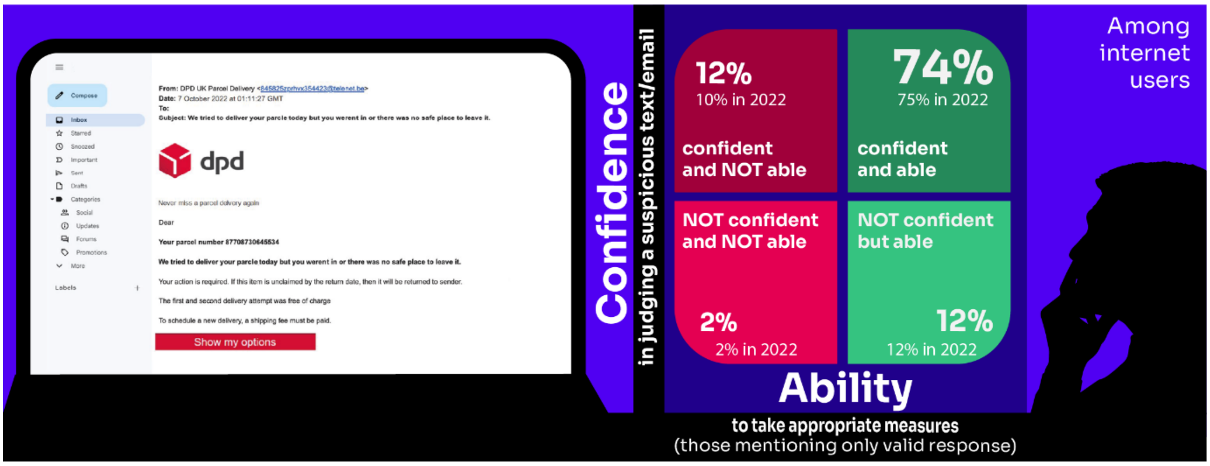
Younger adults are more likely to be confident in recognising scams online, but lack the ability to respond appropriately

We showed respondents a mock-up of a scam email from a parcel delivery company and asked, both prompted and unprompted, what they would do if they encountered such an email.[10] Eighty-six per cent of adult internet users said they felt confident in judging whether an email or text message they received was potentially suspicious. Exactly the same proportion of adults demonstrated their ability by selecting only valid responses when confronted with the email scenario.[11] This included half of

[9] Ofcom Online Experiences Tracker 2023
[10] Source: DPD website – Phishing (https://www.dpd.co.uk/content/about_dpd/phishing.jsp). Sources were shown at the end of the survey during fieldwork.
[11] Valid actions: delete it; check the email address to see if it looks genuine; check if someone in the household is expecting a delivery; block the sender/block the email address/move to junk folder; report it; ignore it/I

online adults who said they would delete the email, a similar proportion (48%) saying they would check the email address to see if it looked genuine, and just over a third (36%) who would block the sender.

However, the confident group and the able group did not comprise the same individuals. As many as 12% of online adults felt confident in recognising a scam email, but would not have reacted in an appropriate way. The most common invalid response to the email was to click on the 'show my options' link (9%), followed by following the instructions in the email (5%) and replying to it (3%). Younger adults were more likely to sit within this 'confident but not able' group, with as many as a quarter of 16-24 year olds saying they felt confident when encountering an email or text message, but selecting at least one inappropriate response when their skills were tested. Men were also more likely than women to feel confident but to select an inappropriate response.



Social media profiles

Misinformation is the potential harm that adults are most likely to encounter online, according to our Online Experiences Tracker.[12] Given the rise in AI-generated content and the upcoming UK and US elections, 2024 will be a particularly important year for people to feel confident and able to recognise misinformation on social media. Part of this will be the ability for people to spot fake social media profiles. As in previous years, we showed respondents a mocked-up social media profile, asked whether they thought it was genuine, and asked them to click on aspects of the profile that helped form their decision.

Older adults are less likely to be able to identify a fake social media profile

Slightly fewer online adults felt confident in judging whether online content was true or false than felt confident in identifying scams, but the proportion was still high, with almost eight in ten (78%) adult social media users feeling confident. When tested by being shown a fake social media profile, 77% of social media users said they thought the profile was fake, with 9% thinking it was genuine

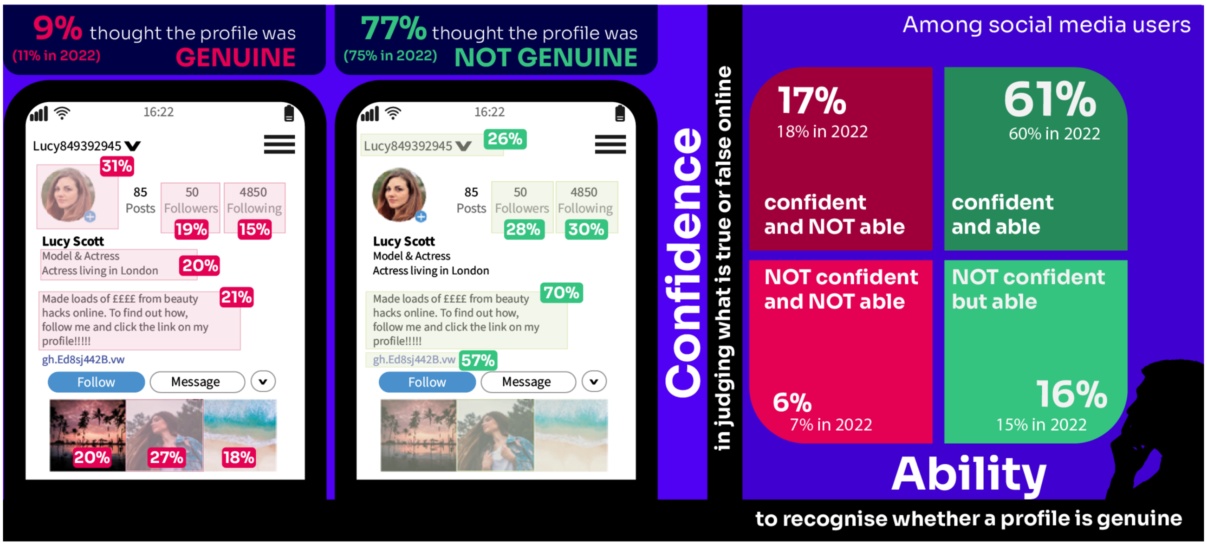
wouldn't do anything; check elsewhere to see if it is genuine or has been reported; check with a friend or family member for advice on what to do. Invalid actions: Click on 'Show my options'; follow the instructions (in the email); reply to it.

[12] Ofcom Online Experiences Tracker 2023

and 14% unsure. This is broadly consistent with the results from 2022, but an increase since 2021, when only seven in ten (69%) social media users thought the profile was fake.[13]

For those who felt the profile was not genuine, the key indicators were the text; both the text below the name of the profile which advertised making money through ‘beauty hacks’, and the suspicious URL link. For those who felt the profile was genuine, imagery was important – the indicator most likely to be selected was the profile picture of a young woman, and the second most likely was the second post on the profile which showed an image of a young woman.

As with the online scam, the participants’ confidence in their ability did not match in every case with their skills. Seventeen per cent of social media users felt confident that they could identify whether online content was true or false, but were unable to recognise the fake profile. Those who were less likely to identify the post as fake were those aged 65+ and those in the C2DE socio-economic group. Those aged 55+ were more likely to answer ‘don’t know’ when asked whether the profile was genuine or not, including a quarter of over-65s who could not decide either way. This may relate to the fact that younger adults are more likely to use a wider range of social media apps and sites.



Social media posts

Another important skill related to misinformation online is determining whether posts on users’ social media feeds, by organisations or individuals, are reliable or not. To explore this further, we showed social media users a real post by Citizens Advice on Facebook and asked them whether they felt that the post was genuine and what elements of the post influenced their decision.[14]

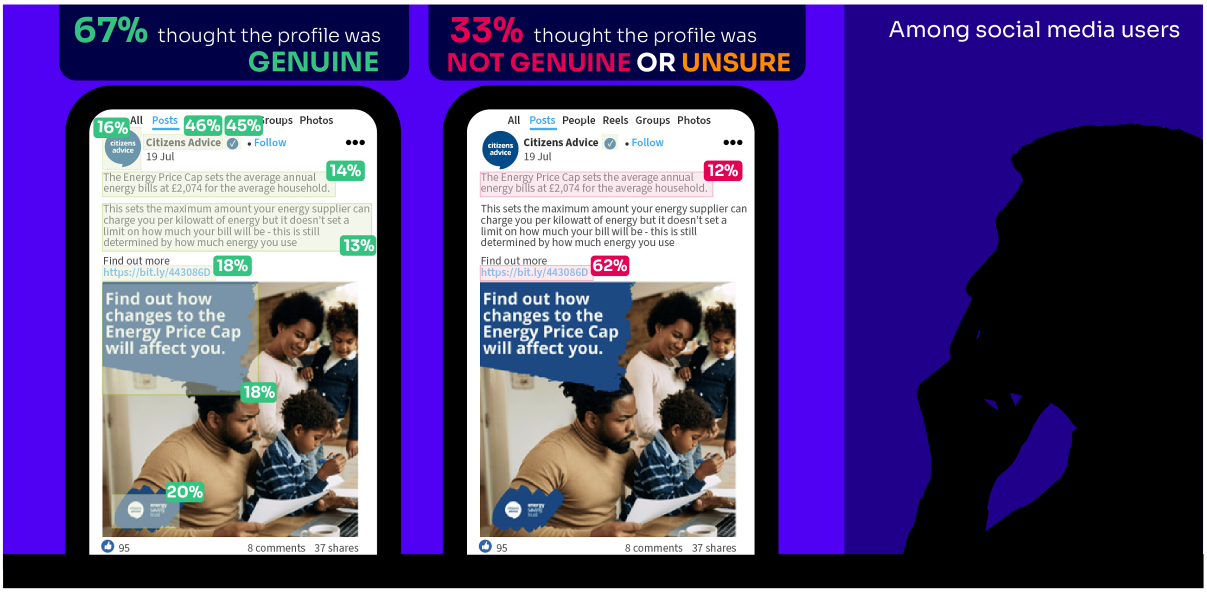
[13] This profile is a fictional profile. Images were taken from Pexels. Sources were shown at the end of the survey during fieldwork.

[14] Source: Citizens Advice, Facebook, 19th July 2023 (Citizens Advice Facebook page – https://www.Facebook.com/CitizensAdvice), (Facebook post - https://www.facebook.com/CitizensAdvice/posts/pfbid0fcSaAkhdjvNsUAMrCszSRzcVD7RHXpApyEYnzch8LJSooXJevXjwLqtp8L15YJDFl). Sources were shown at the end of the survey during fieldwork.

Social media users reassured by verification ticks, but suspicious of shortened URLs

Two-thirds (67%) of social media users said they felt that the social media post was genuine. The most important features of the post that led them to make that decision were the name of the page that was posted (Citizens Advice) and the blue verification tick. On the other hand, 16% of the social media users felt that the post was not genuine, and a further 17% were unsure. For these groups, the main reason why they felt unsure was the website link on the post, which included a shortened 'bit.ly' URL. As many as six in ten (62%) of those who felt the post was genuine, or were unsure whether it was genuine or not, highlighted the website link as a factor in their decision.

As with the social media profile task, older social media users were less likely to believe that the Citizens Advice post was genuine, at only 55% of 55-64-year-olds, and 46% of over-65s. Users aged 55+ were also more likely to answer 'don't know' when asked whether the post was genuine or not. This is important; because of their lack of trust in these kinds of posts, older and more vulnerable households may be less likely to benefit from useful information online such as that on the energy price cap in the Citizens Advice post.



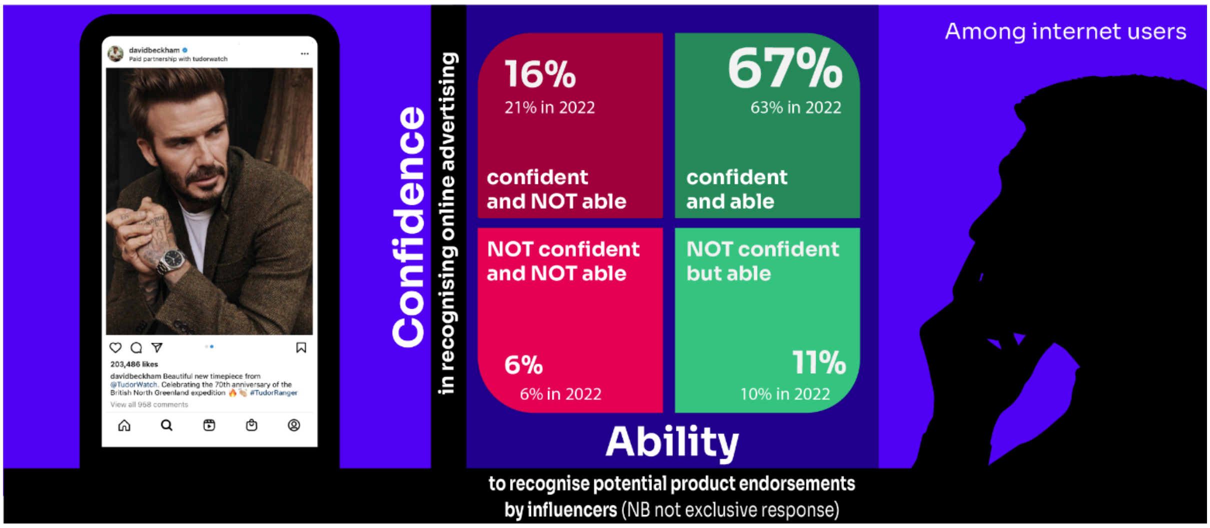
Paid partnerships

Navigating the world of social media has become more complex in the last few years with the increasingly blurred lines between commercialised content and content that is purely for entertainment. We have described the importance of reviews of products by influencers and celebrities to young adults who are looking to make a purchase. But it is not just major celebrities and influencers who promote products on social media: 7% of adult social media users on our survey said they had a second social media account to run or promote their businesses.

Fewer online adults were confident, but not able to identify, paid partnerships on social media in 2023

With this in mind, we tested internet users' ability to recognise paid partnership advertising on social media. We presented respondents with a real Instagram post from David Beckham in which he promotes a watch brand, and asked them why they felt he was promoting the product.[15] Seventy-eight per cent of online adults correctly stated that he was being paid or given gifts by the company to make the product endorsement. One in five said it was at least partially because he thought the product was good to use, or high quality, and 18% said it was because he thought the information would be interesting or useful to his followers.

More than eight in ten (83%) internet users felt confident in recognising advertising online. When cross-referencing confidence with ability, 16% of social media users were confident but not able to recognise paid partnerships, which is a decrease on the 2022 figure of 21%.[16] Those aged 16-24 and those in socio-economic group C2DE were more likely to remain in the 'confident but not able' group. Two-thirds (67%) of internet users were in the 'confident and able' category, up from 63% in 2022.



Sponsored search engine results

Advertising appears in many different areas of the internet, not just on social media. This includes sponsored search engine results, where companies can pay to have their results appear at the top of a search, with those results marked with 'sponsored' or 'ad'. As in previous years, we showed respondents a screenshot from a Google search for 'walking boots' which included four of these

[15] Source: David Beckham Instagram account, 8th July 2022 (Instagram handle – davidbeckham), (Instagram post - https://www.instagram.com/p/CfwYD24owMB/?hl=en). Sources were shown at the end of the survey during fieldwork.

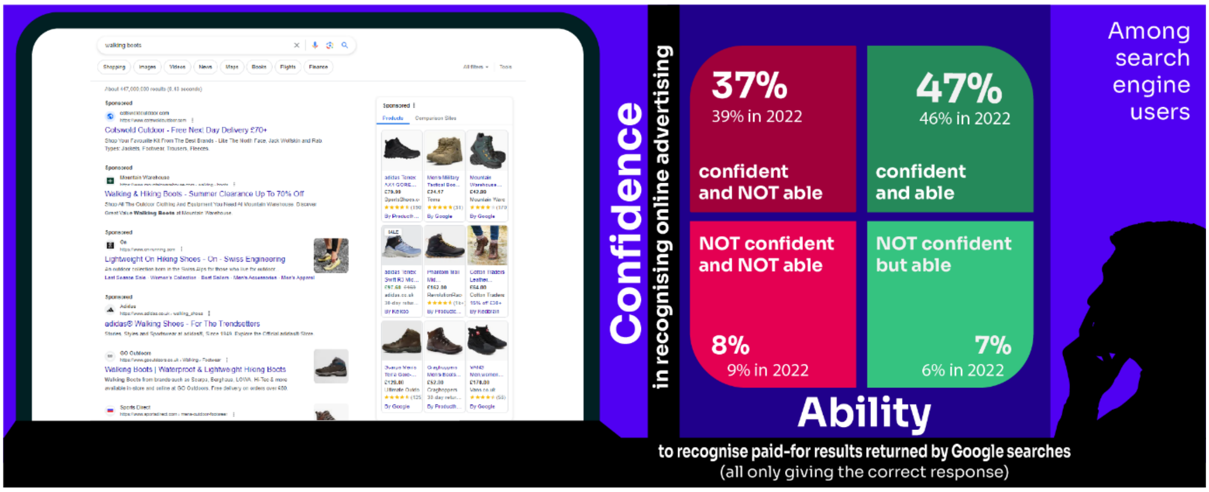
[16] Note: there was a slight wording change in one of the question codes in 2023. 2023's code read 'he is being paid or given gifts by the company or brand to say this', while 2022's code read 'he is being incentivised by the company or brand to say this, by being paid or given gifts'.

sponsored search engine results, and asked them to tell us why the first four results are placed there on the webpage.[17]

Less than half of adult search engine users felt confident and were able to recognise sponsored search engine results

Just 54% of online adults gave *only* the correct response, which was that the first four results were sponsored links from companies which had paid to be there. This is broadly in line with 2022, but an increase since 2021 (48%). Just under a quarter (23%) of adults said that the sites were high up due to being the most popular results used by other people, and 22% said they were the best or most relevant search results. Those in socio-economic group ABC1 and those aged 55+ were more likely to correctly identify the search results as being sponsored links.

While just under half (47%) of adult search engine users were both confident in their ability to recognise advertising online and proved their ability to do so, as many as 37% of online adults were in the 'confident and not able' category. Those more likely to be in this latter category included younger adults aged 16-34 and men.



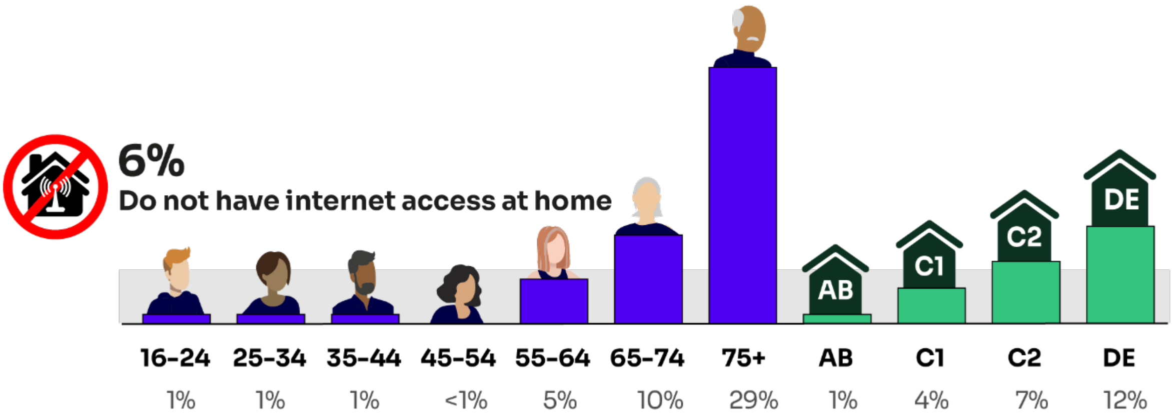
[17] Source: Google search of 'walking boots'. Walking boots images (reading left to right): SportsShoes; Temu; Mountain Warehouse; Adidas; Revolution Race; Cotton Traders; Ultimate Outdoors; Craghoppers; Vans. Sources were shown at the end of the survey during fieldwork.

Digital exclusion and smartphone use

Internet access

Internet access levels are consistent since 2021

A core measure of digital exclusion is home internet access. In 2023, we found that 94% of households had access to the internet at home while 6% did not. This has been stable since 2021, following an uplift in internet access during the first year of the Covid-19 pandemic. A lack of access to the internet at home was more likely among those aged 65-74 (10%), over-75s (29%) and those living in a DE household (12%).



Reasons for not having internet access at home vary; some are not interested in being online and others face barriers to access

The most common reason given for not having internet access at home was not being interested or not having the need to go online (69%); this has remained stable since 2022. This was followed by reasons related to getting online or using the internet being too complicated (22%) and reasons relating to cost, such as the price of broadband or a device to go online (17%). We also found that 82% of those without internet access at home said that nothing would prompt them to go online at home within the next 12 months, which has also remained consistent over recent years.

Many adults without internet access at home use others to do things online for them

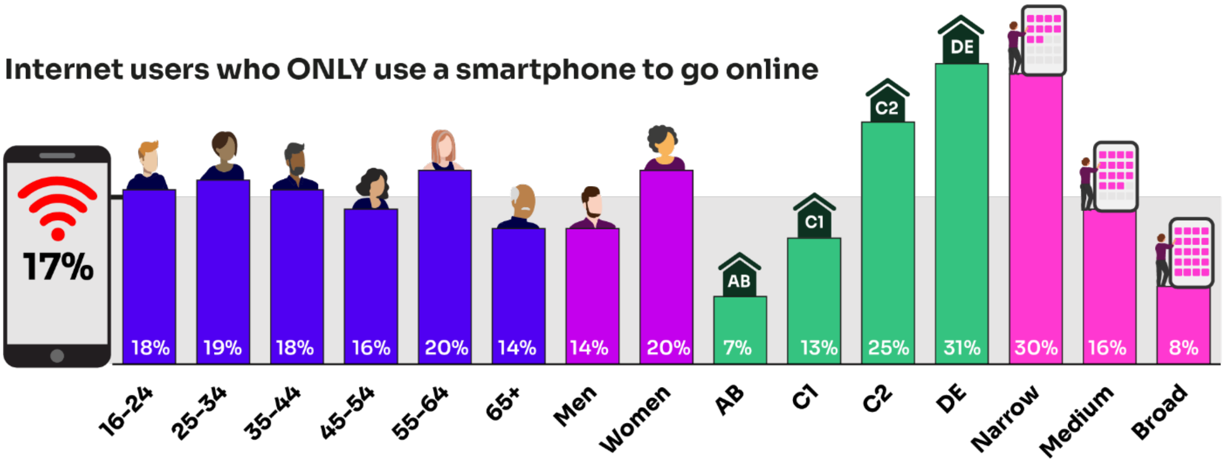
Just over half (52%) of adults who do not use the internet at home had asked someone else to do something on the internet for them in the past year. The most common activities were online shopping (42%), followed by accessing health services (30%) or other public services provided by the Government or council (26%).

Of those adults who do use the internet, 53% had helped someone else do something online in the past year; this was more likely among 16-44-year-olds (66%) and those in AB households (63%).

Smartphone-only internet users

Almost a fifth of internet users only use a smartphone to go online, and some feel disadvantaged by this

Among all adult internet users, 17% go online exclusively via a smartphone and no other device. Those in this category are more likely to be women (20%), narrow internet users (30%) and in a C2 (25%) or DE household (31%).



The reasons for only accessing the internet using a smartphone vary; for some this is a personal preference, while others may face barriers to using other devices such as affordability or a lack of confidence.

It is important that we consider device use within the context of digital exclusion, as some users feel that relying on *only* a smartphone to access the internet can limit their online experience. Almost three in ten (29%) smartphone-only internet users say they have felt disadvantaged by this. While smartphones allow internet users to complete a range of activities on the go, factors such as the smaller screen size, limited functionality or data allowance restrictions, can mean they are seen as less suitable for completing certain tasks. For example, 68% of all smartphone users think that completing forms and working on documents is more difficult on a smartphone than on a laptop or desktop (53% for smartphone-only users) and 52% say that comparing products or services online is more difficult to do on a smartphone (35% for smartphone-only users). Although in both cases this is lower for smartphone-only internet users, these factors help to explain why some may feel disadvantaged. These are broadly comparable with 2021 figures, suggesting that these problems are not going away.

Issues around affordability may also contribute to the feeling of being disadvantaged. According to our Technology Tracker, 4% of adults have mobile-only access to the internet at home, which may mean they have a less reliable connection and feel more constrained by mobile data limits.[18] Three in ten smartphone users say that when they go online using a smartphone, they tend to complete tasks as quickly as possible to avoid using up too much data, and the same proportion of smartphone-only internet users agree. This latter group are likely to feel this most acutely, and for them it could lead to rushing or abandoning online tasks and activities.

[18] Ofcom Technology Tracker 2023

But for many adults, their mobile phone would be their most-missed device

Despite the limitations experienced by some, it is important to highlight the value of smartphones to many internet users. When asked which device they would miss most if it were taken away, 45% said their mobile phone/smartphone, with the next highest being a television set, at only 25%. Notably, the proportion answering 'mobile phone' was higher than average among 25-44-year-olds (62%) and broad internet users (63%).

Several of our *Adults' Media Lives* participants have upgraded their phones in the past year, after several years in which upgrades were relatively few and far between. Most of the upgraded handsets had been three or more years old. These devices have become multi-functional tools, and this underpins their importance to individuals. The most-cited reason for choosing their new device was the quality of the phone's camera.

Almost all participants chose a newer model from the same manufacturer as their previous handset. Many were happy with their existing manufacturer, but some also cited practical concerns over data transfer and interoperability with other devices they owned, such as tablets and earphones.

> "So, I got the Apple headphone pros, you know, the big ones, the kind of astronaut ones... and a new iPhone. I got an iPhone 14 Plus because I just had the iPhone X and I had that for years and years and years. And I actually was getting bullied for it."
>
> Female, 30, Solicitor, Edinburgh

> "I used to have a Note Ultra 20, but I've now got a Galaxy S23 Ultra. I got it because it was quite similar to the Note, but the camera is just impeccable. It's unbelievable."
>
> Male, 37, Fraud Analyst, Leeds

> "In the last God knows how many years I've always had Samsungs. I know it's easier to transfer your data over. I thought that at that time. You know that Smart Switch thing can do it now on anything, can't it? But I would still keep to a Samsung."
>
> Male, 34, Carer, Clacton

Adults’ media literacy over time: 2005-2023

Introduction

We have been asking adults about their media use and attitudes for nearly 20 years, and this section sets out some of the ways in which media literacy has changed – or not – over that period. For this initial overview we have focused on the all-UK picture. We will provide analysis examining change by demographic group in further publications.

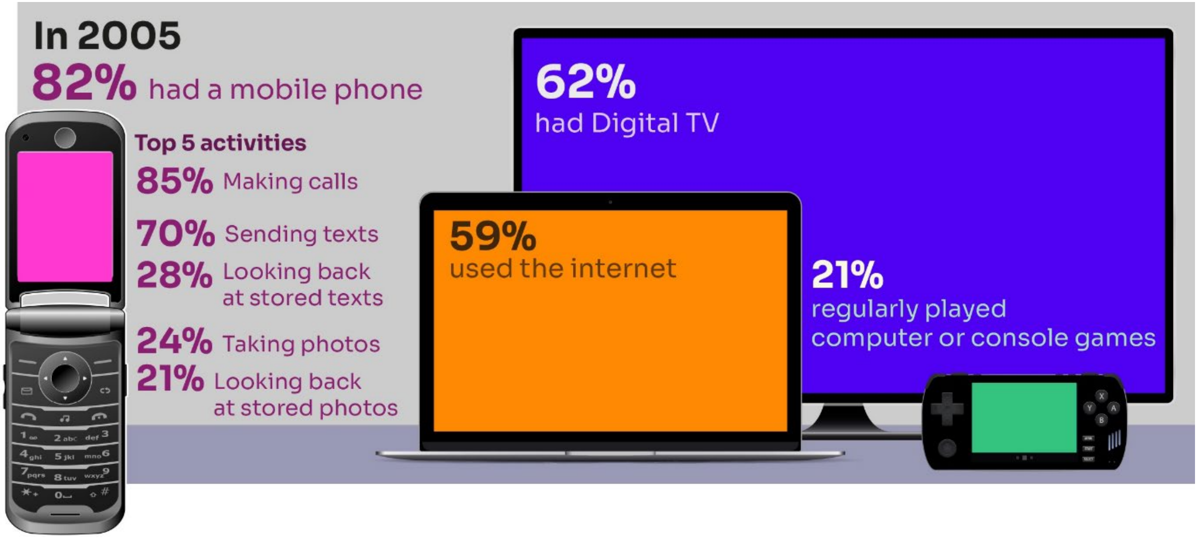
While our survey methodology was face-to-face between 2005 and 2019, it has changed to a combination of online and face-to-face methods, with a period of postal surveys during the Covid-19 pandemic in 2020 and 2021. Given these changes, as well as the need to change some questions’ wording over the period, the trends described here are indicative and illustrative rather than tested for statistical significance, and the time periods that are examined are not uniform. Rather than provide footnotes for each finding, all material in this section comes from our reports, data tables and data files during this period, located either on the Ofcom website or in the National Archives.

Before looking at a selection of trends over time, we first outline media use in 2005, to provide an initial context of the kinds of ownership and use of media at that time.

The media use landscape in 2005

A sizeable minority of the UK adult population in 2005 was ‘analogue’ – only six in ten had digital TV (62%) and a similar proportion said they used the internet (59%). One in five people said that they regularly played computer or console games.

Mobile phones at this time were widespread, with 82% of UK adults saying they had one – although they were mainly without internet capability: our media literacy surveys didn’t start monitoring smartphone take-up until 2010. In 2005, mobile phone calls and messages were countable – we asked people to estimate their weekly activity, and an average of 20 calls were made and 28 text messages were sent each week. Using the phone as a memory device was a fairly novel and popular activity: between one in five and one in three said they looked back at stored messages or photos on a weekly basis.



One of the biggest changes since 2005 has been in the portability of devices and the extent to which much of our consumption and communications is no longer fixed, physically, in a particular environment. In 2005 we were tethered: TV was watched on a TV set, and going online largely happened via a desktop PC in a domestic space.

Internet use was predominantly about email communication and information. While the most common activity online was email (72% of online users doing this each week), the next most common activities were those related to finding information: either for work or studies (52%), or for various leisure purposes such as cinema times, sports results etc (49%). Less than half of internet users carried out transactions such as shopping, making bookings, or paying bills on a weekly basis (45%) and only three in ten went online for entertainment such as gaming, radio, or music (31%).

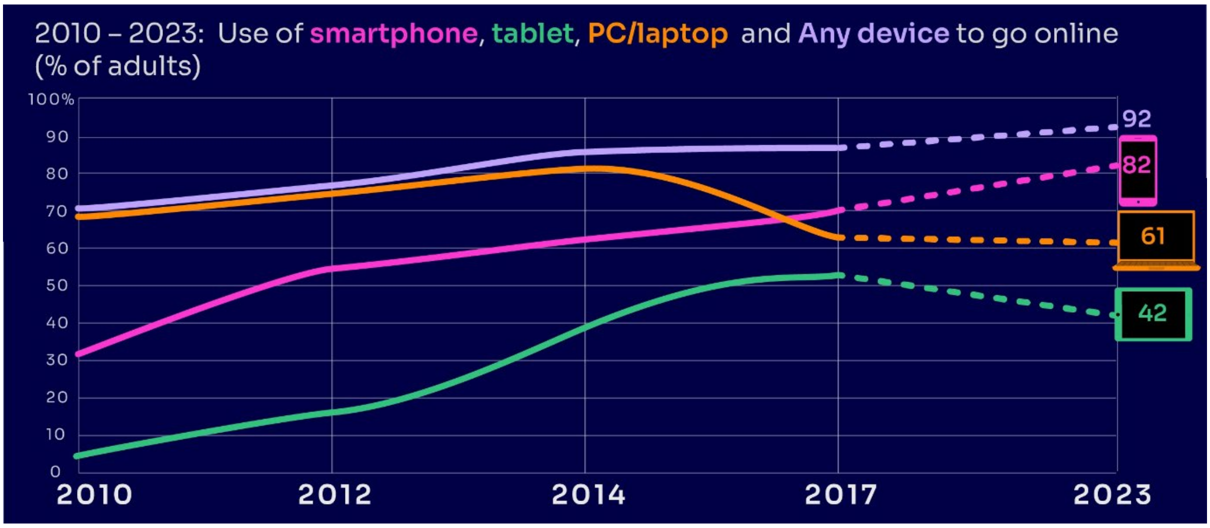
When we asked users why they had acquired internet access, the most common reason was in order to access information (46%) with communication much less likely to be nominated (28%).

Overall, our ways and means of interacting and carrying out various types of activity were less digital than is now the case. Almost half of people said they would prefer to check their bank balance in person, although one in five preferred to do this online. And about one in ten preferred to catch up with friends or family living far away by letter, and the majority by landline, while only 5% preferred a mobile phone call.

Trends in access and use over time

As is well documented, internet use has increased significantly since 2005; from 59% of adults in 2005 to 71% in 2010, to 87% by 2015, and 92% by 2023. This rapid development coincided with considerable changes in the devices used to go online between 2010 and 2017 in particular.

In 2009, seven in ten (69%) adults said they used the internet at home, with two-thirds using a PC or laptop (67%) to access it, compared to 28% using a mobile phone and 10% using a games console/ player. In 2010 we began to monitor smartphones and tablets: 5% of respondents said they used a tablet to go online at home, and three in ten said they used a smartphone. Between 2010 and 2011 there was a considerable leap in use for both devices – the use of smartphones to go online almost doubled, from 31% to 53%, and the use of tablets tripled, from 5% to 16%. The following year saw another leap for tablets, to 39% in 2012. By 2017, smartphones were the dominant way to go online with 70% saying they did so in this way. In the space of less than a decade, the means – and screen size – to go online had changed considerably, and smartphones remain the most common means of online access.



Note: methodology changed in 2020 and 2021, so recent trend is indicative only

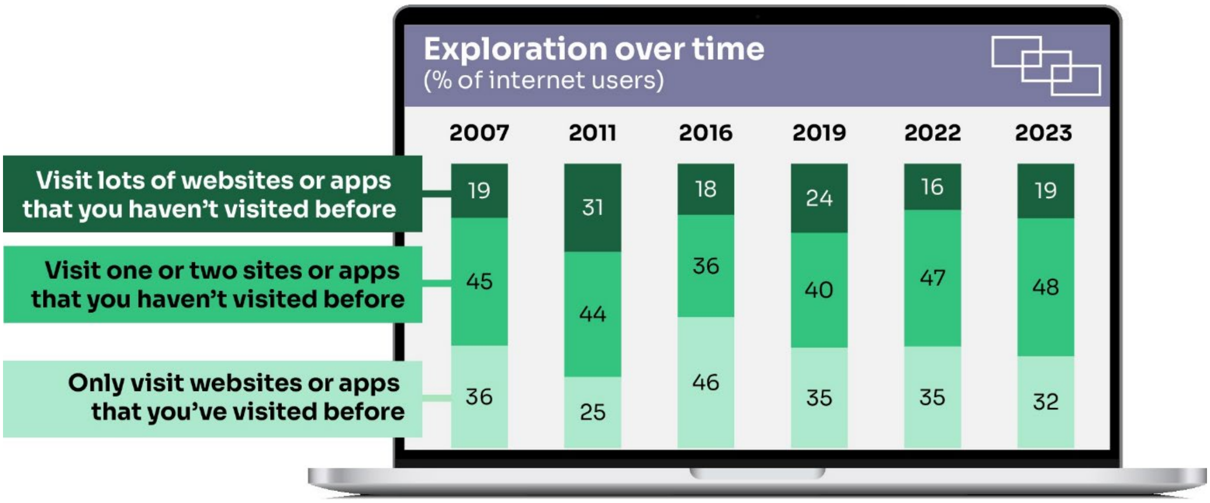
Frequency of use also increased considerably, and has accelerated in recent years. Our 2017 report noted that our qualitative study participants were sometimes feeling over-dependent on their smartphone, "including feeling compelled to regularly check their phone, even when in company" (2017 report, page 2). In the space of seven years this behaviour has gone from being a new finding to a mainstream habit among most users.

Another mainstream habit nowadays – that of multi-tasking, or carrying out multiple media activities at the same time – was first asked about in our 2007 fieldwork, when two-thirds of TV viewers said they used another form of media at the same time, and half of these said they used their mobile. We have long since stopped asking this question, given the widespread nature of this habit.

One key development over this period was the rise of social media. One in five internet users said they had set up their own profile in 2007 (22%) and this doubled to 44% in 2009, increasing to 59% in 2011. By 2023, 89% said that they used any social media apps or sites. The frequency with which people access these sites has also changed considerably. While nowadays the norm is to access these sites repeatedly over the day, in 2007 70% of users said they visited these sites less than once a day, and it wasn't until 2011 that we introduced a frequency measure of 'more than once a day'.

In the early days of social media, people's reasons for using it were mostly to talk to friends and family, and to look for people after losing touch with them, or to look at other people's pages without leaving a message. The use of social media for consuming content from third parties was relatively limited, with most of this activity linked to listening to music rather than other types of content. By 2023, while six in ten users said they used them to follow friends (62%), over a third (36%) said they followed companies or brands, and three in ten followed celebrities.

Since 2007 we have asked people to consider their own use of sites/apps that are new to them, to gauge the extent to which people stay within the parameters of what they know, or whether they have a more exploratory mindset. Our hypothesis was that as people became more familiar with the online environment, their patterns of use and exploration would expand. In fact, the extent of exploration has changed little over the years. In 2007, 19% of internet users said they visited lots of sites they hadn't been to before, 45% said they visited one or two new sites, and 36% said they only used websites they'd been to before.



Note: methodology changed in 2020 and 2021, so recent trend is indicative only

By 2011, 31% said they were visiting lots of new sites. However, by 2016 the figure had reduced to 18% using lots of websites or apps, 36% using one or two ones they hadn't used before, and 45% only using websites/apps they'd used before. In other words, exploration was diminishing. Although in 2023, as highlighted earlier in this report, there has been an increase in exploration compared to the previous year, this is set against this backdrop of little overall movement over the longer time period.

The reasons for this can perhaps be linked to the way in which online services have become more aggregated and multi-purpose. For example, online retailers are increasingly providing not only shopping but entertainment, and social media platforms are used for not only for communications but for search, information and entertainment. The majority of people tend to stick to a selection of familiar sites and apps for their internet activity.

Returning to the preferences that people stated for their various types of communications activity, there has been considerable change over time. While in 2005, 35% preferred to book a holiday by meeting in person, followed by 29% preferring a landline call, and 22% going online/emailing, in 2013 email/online was the most nominated (44%). By 2023 this had risen to 62% while the preference for making arrangements in person had dropped to 17%.

In 2005, as stated earlier, almost half of people (49%) preferred to meet in person to check their bank balance, although one in five had a preference for email/website. In 2013 these figures had shifted to 38% and 40% respectively, and by 2023 the preference for online/email was predominant at 75%, with just 14% preferring to do this in person.

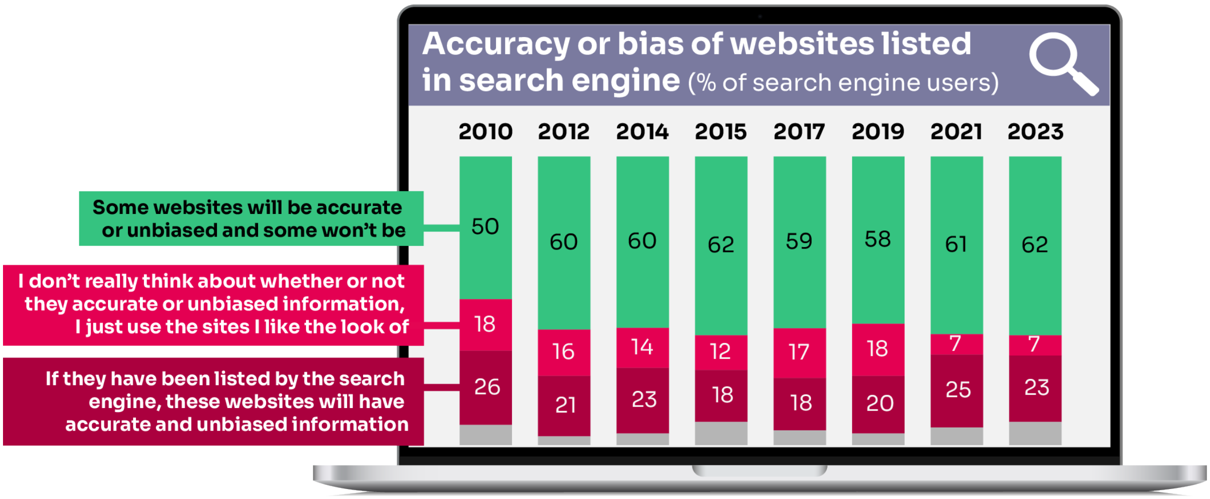
Trends in knowledge and understanding over time

Over the years, we have asked questions about habits and attitudes relating to various aspects of people's critical understanding and awareness – in essence, their savviness. The topics we have covered include understanding how search engine results are formed and displayed; attitudes and knowledge relating to various types of online advertising; and attitudes and habits about personal data, privacy and security measures.

In 2010, we started monitoring the extent of trust that people had in search engine results, and their awareness of how these results were generated, given that search engines were the main way of locating content at that time.

We asked people about their views on the accuracy or bias of the information on the websites that appeared in search results pages. In 2010, half (50%) of search engine users gave a largely media-literate response when presented with prompts – that some websites will be accurate and unbiased while others won't be. A quarter (26%) thought that the search engine fulfilled some kind of editorial function – that if they have been listed by the search engine, the websites would have accurate and unbiased information. And one in five (18%) were unaware – agreeing with the statement that *"I don't really think about whether or not they have accurate or unbiased information, I just use the sites I like the look of"*.

The media-literate responses grew slightly over the years, to reach 62% by 2015. But since then, the figure has remained broadly the same, and is 62% again in 2023.



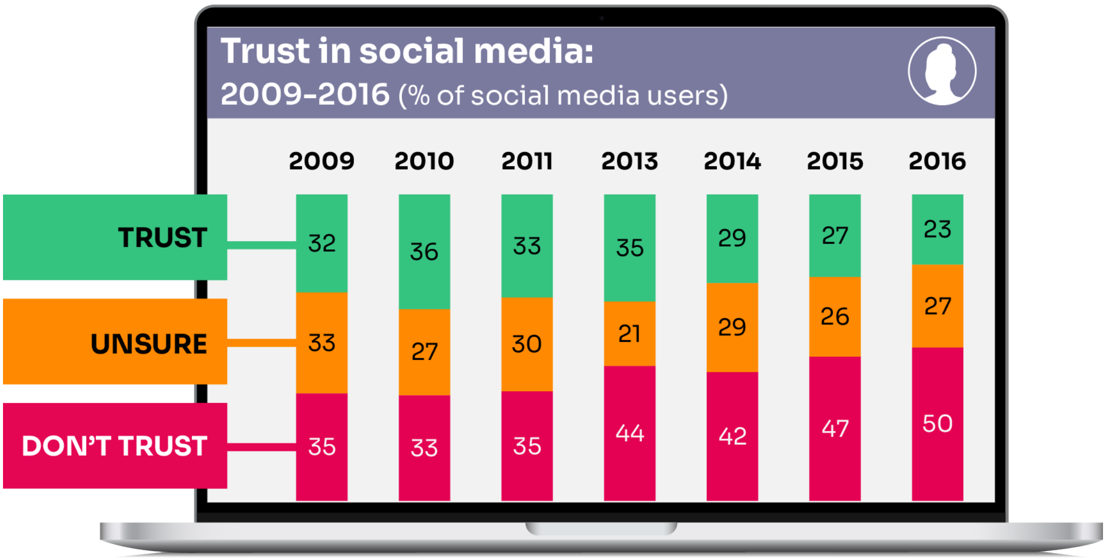
Note: methodology changed in 2020 and 2021, so recent trend is indicative only

Since 2015, we have also monitored the extent to which sponsored advertising on search engines is understood by users. In 2015, about half (49%) of search engine users correctly stated that the first four results for a search for 'walking boots' were only there because they were adverts or sponsored links. This has changed only marginally since this time, with 54% stating only the correct answer in 2023, as noted earlier in this report.

Awareness of personalised advertising is a related area of understanding explored in recent years. In 2016, a little over half (56%) of internet users were aware that they might see different adverts to other people, and about a quarter (27%) thought they would see the same adverts as everyone else. In 2019, this had increased to 61%, with 20% thinking they would see the same adverts as everyone else. By 2023, about two-thirds (65%) of internet users said that they were aware of personalised adverts, although this slight increase over time may be a result of changes in survey methodology.

When we started to track social media use in 2007, we also started to monitor people's attitudes and habits relating to their norms of posting, and privacy and security issues.

Trust in the content of social media sites was evenly split in 2009 between those who tended to trust it (32%), those who didn't (35%), and those who were unsure or didn't know (33%). By 2014, social media site content was less trusted – 29% of social media users said they tended to trust it, compared to 42% who said they didn't, with 29% unsure. And in 2016 trust was lower again – 23% trusted it compared to 50% who did not.



Back in 2011, about one in ten social media users said they would be happy to share various types of personal information such as date of birth and photographs with 'anyone', and a further one in five said they would be happy to share with 'friends of friends'. Only 3% were happy to share contact details, although a further 13% were happy to share such information with friends of friends. In 2016, we asked how often social media users considered the privacy or data security implications when posting photos. Nearly half (46%) said they always did this, 31% said sometimes, and 22% said rarely or never.

We also asked a range of questions about privacy and personal data issues relating to a wider range of types of site and service, beyond social media. Between 2005 and 2015 we asked internet users how happy they were to provide personal information online such as their email address, home address, card details, etc. There was very little change in attitude until 2014, with about a third saying they were happy to do this, about four in ten saying they had some concerns, and between one in ten and one in five saying they would never provide such details online. People were initially far more likely to be happy to provide their personal email address (54% in 2005) but this had decreased to 37% by 2011. However, by 2014 and 2015, this had changed, with only two in ten saying they were happy to provide such details.

That said, and taking into account the range of questions that we have asked over the years, people seem to have become more resigned to the use of their personal data by companies, and acknowledge that as long as there are benefits to them, the use of their data is acceptable. In 2016, just over a third (36%) of internet users agreed that they were happy to provide personal information online in order to get what they wanted. Our question was revised in 2018 and since then, there has been a gradual increase in acceptance of the use of personal data by companies if trade-offs are met: such as being able to opt out at any point, clarity over the use of data, and reassurance that companies will not further share data.

Summary

This brief overview of our survey data since 2005 provides a useful lens through which to view the current online landscape.

It illustrates how online use has only relatively recently become ubiquitous, always-accessed, and portable. It shows how over the same period various measures of critical understanding have either remained static or improved only marginally. And it shows a growth in resignation or acceptance of some of the trade-offs of online life, as long as certain norms are adhered to or if there is some benefit or utility to users.

It also shows the importance of tracking new habits and attitudes as soon as they start to emerge, given how rapidly these can become mainstream and appear immutable, rather than anchored to specific circumstances and contexts.