

Adults' Media Lives

Wave 21: 2026

A report for Ofcom
April 2026

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Introduction to the study

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

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

For instance, we see how going to university, entering or leaving the world of work, becoming a parent, experiencing the break-up of a family or financial hardship are important drivers of change in participants' relationship with media.

This year, 17 face-to-face (in-home) and three online interviews were conducted between 6th and 31st October 2025 by Mark Ellis, Laurie Dempsey and Tony Harbron of The Knowledge Agency.

The number of participants in the study is relatively small, but these people are chosen carefully to reflect a broad cross-section of the UK population in terms of age, gender, location, ethnicity and socio-economic background. All participants from the previous wave took part again this year, and more than half of the sample have participated for over 15 years.

Certain subjects are tracked each year, for example:

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

However, the research model is flexible enough to explore specific new areas of interest each year; for example, attitudes to the introduction of Highly Effective Age Assurance under the Online Safety Act.

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

- Participants becoming increasingly reliant on the internet for everyday activities such as shopping, banking, studying, house-hunting, applying for jobs and engaging with public services. For some this has been extremely empowering, but those without access to the internet – or the skills to use it effectively – have at times felt disadvantaged or disenfranchised.
- Growing use of streaming services alongside traditional broadcasting, leading to a shift in participants' viewing patterns from linear TV to time-shifted and on-demand viewing.
- A reduced reliance on – and trust in – mainstream news providers, as news consumption has become more fragmented and personalised, and social media has become a gateway to more diverse sources of information and influence.
- A shift in privacy issues from worries about personal data being hacked, or private details of their personal lives leaking into the public domain, to concerns about how much information about them is held by online platforms.

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

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

[1] ofcom.org.uk/media-use-and-attitudes/media-habits-adults/adults-media-use-and-attitudes/

Overview

Key insights from Wave 21 include:

1. Artificial Intelligence

Participants' relationship with Artificial Intelligence (AI) has evolved greatly in the past year. The majority of participants now have experience of using AI tools such as ChatGPT, Gemini or CoPilot. User experiences have generally been positive, and most have found the technology empowering.

Attitudes were more mixed to the unsolicited introduction of AI-based functions on existing technology, such as AI assistants on smartphones. This was especially true for some older participants, who find the changes confusing.

Experiences of using AI assistants and chatbots in customer service interactions continue to be mostly negative. In most cases participants ended up speaking to a real person to resolve their query or complaint.

Participants are concerned about AI being a threat to jobs, and one has already been made redundant because of AI. This has begun to influence their training and development choices, and some parents are worried about their children's career prospects.

Parents are struggling to work out how best to guide their children in their use of AI, particularly in terms of getting the balance right between preparing them for a world where AI skills will be needed, and more traditional learning and critical thinking skills. This is compounded not only by different advice and policies between schools, but differences between individual teachers within the same school.

Participants claim not to anthropomorphise AI, but their language and behaviour does not always support this. They often ascribed human characteristics to AI in the words they used to describe it, and some have consulted AI tools for help with personal matters such as relationship advice.

Participants claimed to have seen more AI-generated fakes and misinformation in the past year. There were mixed views on how easy these are to spot.

2. Viewing and listening

Participants claimed to be streaming more and viewing less linear TV. This is part of a medium-term trend we have seen over recent years. Participants also reported more of their viewing as being on their own, with less shared/communal viewing overall.

Many participants claimed to be viewing more YouTube, in particular, in the past year. For some men, YouTube is now their main (or only) form of viewing.

The role of streaming services is changing. Participants frequently mentioned watching a film or drama series on (e.g.) Netflix as their typical shared viewing experience with their partner or family. Individual viewing was much more likely to be on YouTube.

Despite changes in viewing behaviour, PSB programming is still valued by many. There still seems to be an important role for “event” programmes at particular times of the week (e.g. Saturday night entertainment) or year (e.g. major drama series in the Autumn).

Participants claim to be listening to less radio but consuming more podcasts (including video podcasts via YouTube). These cover a diverse mix of subjects and come from a broad range of producers.

3. News, authority and trust

Participants source their news from an increasingly disparate range of information sources and platforms. However, most stick to a small repertoire of sources, or don’t actively seek out news at all, relying on their social media feeds to keep them informed.

Many participants are less engaged with the news these days and some have lost faith in the major news providers, preferring to access their news from independent content creators and citizen journalists on YouTube.

Many participants are less sure than they once were of what is “authoritative”, and there were contradictions between how they claimed to assess the trustworthiness of sources, and what they told us elsewhere in the interview about their behaviour.

Trust in news sources is becoming more fragmented. Over half the sample still think that the main broadcast media brands are the most trustworthy source for news stories about UK politics or conflict overseas, but there is a small but sceptical segment of participants who are deeply mistrustful of the mainstream news media. Both groups seem to be becoming more entrenched in their views.

The BBC has become a lightning rod for shifting attitudes. Almost all participants *expect* the BBC (in principle) to perform to a higher professional and ethical standard than other news organisations, but opinions differ as to how successfully it does this. There were mixed views about the value of the licence fee. These were not solely linked to participants' attitudes to BBC News, but often reflected these.

4. Privacy, security, harmful content and online safety

Some participants have become more cautious about personal data and privacy in the past year, particularly those who work from home and/or have office-based jobs. This was partly attributed to high profile cyber-attacks on companies like Jaguar Land Rover and Marks and Spencer.

Participants expressed frustration at the frequency at which they have to give their personal data to apps and websites, and there were numerous examples this year of individuals opting out of using certain apps or websites because of reluctance to share their data.

Participants are still exposed to a plethora of phishing attempts and other online scams, but generally believe they have become quite good at spotting these. Nevertheless, this year, there were three reported cases of participants (or close family members) falling victim to scams.

As in previous recent waves, none of our participants had been subjected to any kind of harmful content directed at them personally. However, many reported that they had been exposed to content that they considered harmful or upsetting – usually graphic images of violence in the news or on social media. Some of this – such as footage of what is happening in Ukraine or Gaza – was considered a kind of "necessary evil". Less welcome was unexpected exposure to graphic footage of the killing of Charlie Kirk, an American political activist, in September 2025.

Awareness of the Online Safety Act and Highly Effective Age Assurance was limited. When prompted, almost all participants were supportive in principle of stricter age verification measures, but most were dubious about how effective these would be in practice.

5. Use of digital devices, platforms and services

There were relatively few cases of participants upgrading their hardware or switching service provider this year. However (similar to last year) participants claimed to be doing more with the devices and services they already have.

The use of smart technology continues to grow slowly, primarily through the acquisition of smart doorbells and users upgrading their smartwatches. In contrast, smart speakers are being used less than before, and in a more limited way.

Participants are using technology more for creativity and learning, especially generative AI tools to create artwork, designs, mock-ups of room layouts, etc. Often this was driven by a specific need, such as university coursework.

Participants continue to look for ways to use the internet proactively to try and generate income. Examples mentioned included buying and selling goods on online marketplaces such as Vinted, creating an online store, and Bitcoin mining.

Screen time remains a concern for many, but inevitable for those who spend much of their working lives looking at a screen. By way of mitigation, several participants now make time away from their phones part of their daily routine.

Participants expressed limited enthusiasm for social media compared to previous years. Few claim to post much content now, and users mostly view content posted by "creators" rather than their friends.

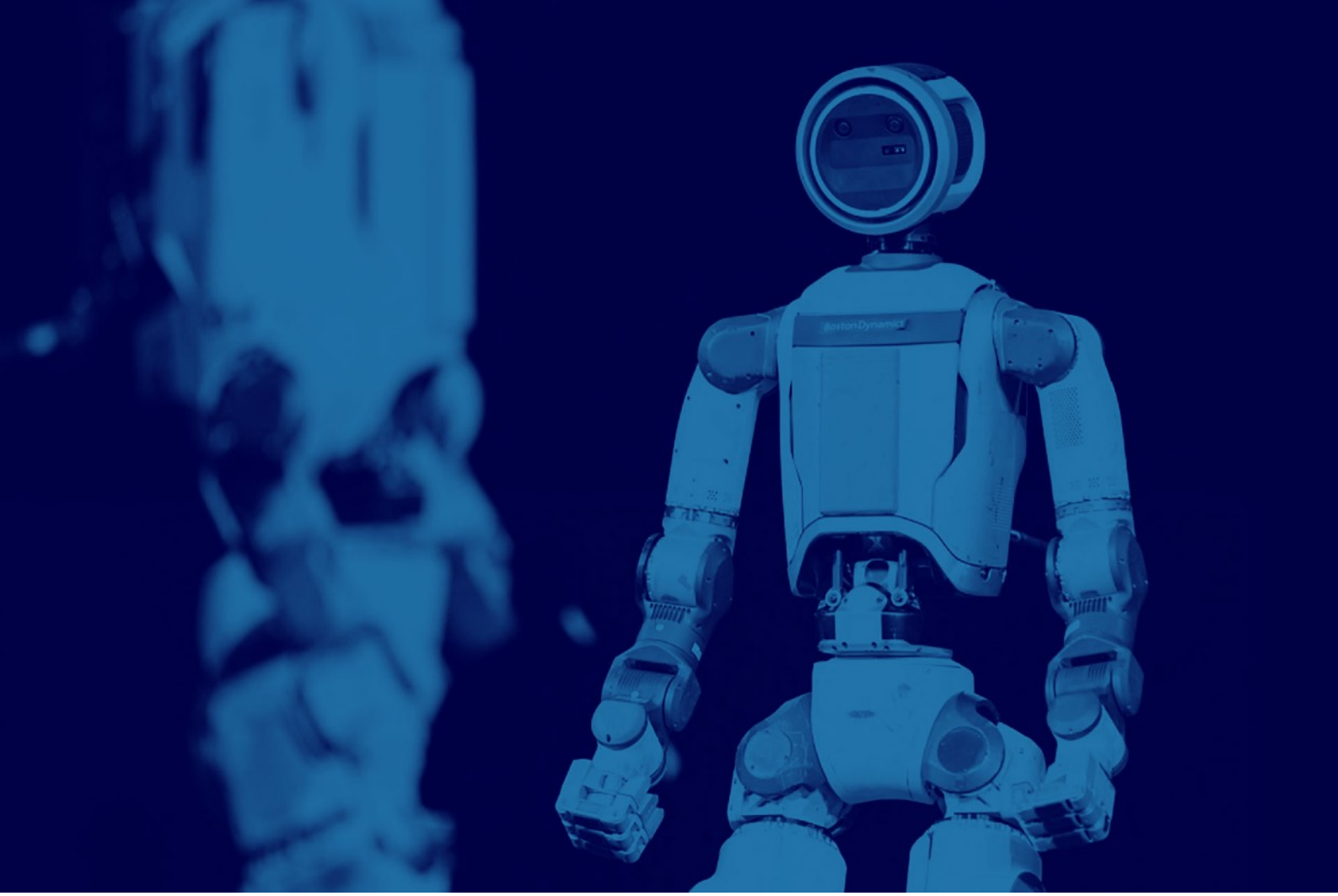
Gaming continues to serve an important social function for some. It is a valued way for younger male participants in particular to stay in touch with their friends. There were also interesting examples of participants attempting to engage other family members in their gaming, with mixed results.

Wave 21 participant profiles

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

	**Hazeem** (5 years in study)	*Hazeem is a 21-year-old university student and currently lives in student halls in Birmingham. He is a technology enthusiast who enjoys having the latest of everything.*
	**Brigit** (7 years in study)	*Brigit is a 27-year-old nurse who shares a house in rural Northern Ireland with her fiancé. She has a hectic work schedule but still manages to be a prolific consumer of social media in her downtime.*
	**Chloe** (12 years in study)	*Chloe is a 25-year-old sports coach who lives in her Mum's house in Warwickshire. She enjoys watching streaming services, and uses the internet and AI tools to help with routine work tasks and plan her travels abroad.*
	**Tim** (13 years in study)	*Tim, aged 27, shares a house in Leeds with his partner, and works in a management role for an online betting company. He is a passionate football fan and devotes much of his spare time to watching sport.*
	**Robert** (12 years in study)	*Robert is a 29-year-old tutor, who shares a flat in London with his partner. He spends much of his day in front of a screen for work, so likes to relax by listening to music and podcasts.*
	**Jenny** (18 years in study)	*Jenny is a 32-year-old solicitor, recently married and living in a house in Edinburgh. Previously an avid social media user, she has cut back on Facebook and Instagram recently, though still devotes much of her spare time to browsing TikTok.*
	**Dean** (20 years in study)	*Dean, 36, works as a carer and lives alone in a flat in Essex, with occasional visits from his teenage daughter. He is sceptical about the mainstream media, and prefers to stream content from alternative sources, especially YouTube.*
	**Julia** (20 years in study)	*Julia is a 37-year-old doctor. She lives in a house in London with her husband and young daughter. Social media has played a prominent role in Julia's life, but is somewhat less important now she is a busy working mother.*
	**John** (3 years in study)	*John is a 39-year-old banking analyst who shares a flat in Doncaster with his partner. He also has part-time custody of a teenage daughter. He loves sport and cars, and devotes much of his media attention to content about these topics.*
	**Dai** (20 years in study)	*Dai is a 46-year-old IT Manager from Cardiff, where he shares a house with his wife and two children. He is a keen athlete and uses technology extensively to support his triathlon training, as well as to watch his favourite sport – rugby.*

	**Suki** (5 years in study)	*Suki is a 48-year-old PA who lives with her two sons in a house in Woking. As a single parent, much of her time outside work is spent supporting her children, but she enjoys browsing social media and watching TV drama.*
	**Denise** (20 years in study)	*Denise, 48, works as a charity fundraising manager. She lives in a Cardiff house, married with one teenage daughter. She has always had a strong interest in media technology, and considers herself to be the "family technician".*
	**Mick** (21 years in study)	*Mick is a 51-year old engineer who lives in rural Derbyshire with his wife and two adult children. He is devoted to his phone, and uses it both to view content and as a means of keeping in touch with home when travelling for work.*
	**Sheila** (21 years in study)	*Sheila, 52, shares a house in rural Somerset with two adult sons, for whom she works as a carer. They spend much of their media life online, viewing alternative content and conspiracy theories.*
	**Sally** (21 years in study)	*Sally is a 59-year-old part-time housing officer and grandmother. She shares a house in Coventry with her husband. She is a traditional TV viewer who loves drama series, but has also developed a passion in recent years for box sets.*
	**Peter** (18 years in study)	*Peter, 64, is an unemployed alarm fitter and grandfather. He shares a house in Belfast with his wife. Paul suffers from ill health and money is tight. He would love to have Sky Sports, but is limited to free-to-air coverage and YouTube highlights.*
	**Elizabeth** (20 years in study)	*Elizabeth, 64, is unable to work for health reasons. She lives alone in a flat in London, but sometimes takes in lodgers. She generally has a cautious approach to media technology, but accesses a lot of health-related content on YouTube.*
	**Donald** (20 years in study)	*Donald, 71, is a retired police officer and grandfather, who still works part-time. He and his wife share a house in Middlesex. Though not an early adopter, Donald has embraced online working, and uses an iPad to watch TV.*
	**Geoff** (2 years in study)	*Geoff is a 74-year-old retired engineer from Warwickshire, where he shares a house with his wife. Geoff has a strong interest in news, and follows a diverse range of sources each day. He also enjoys the major dramas on ITV, BBC and Channel 4.*
	**Cathy** (18 years in study)	*Cathy, a retired office worker, is 81 and lives alone in a house in Edinburgh. Digital technology does not play an important role in her life (she prefers the radio!), but she has learnt to use the internet via both a laptop and smartphone.*



1. Artificial Intelligence

1.1 Participants' relationship with AI has evolved greatly in the past year

Over the previous two waves of research we reported modest growth in the use of AI tools by our sample, mostly among younger participants, and those working in office-based roles. This year we have seen a much more significant growth in the use of AI across the sample, especially outside of work. The majority now have experience of using AI tools such as ChatGPT, Gemini or CoPilot and existing users have been using it more.

User experiences have generally been positive, and users described numerous benefits of AI. It has saved them time, empowered them to do things they might not otherwise have been able to do, and even given them ideas for other ways in which it might be able to help them.

We're writing an article about something, a case that happened in work, and I set it into ChatGPT and it wrote an excellent, excellent essay.

Julia, 37

When you've asked it to do something, it will do it, but then say "Would you like me to do this next?". So it's very proactive, I would say.

Tim, 27

In some cases, AI has far surpassed users' expectations, to the point where they express a degree of guilt for what they worry might be a form of "cheating". One first-time user used ChatGPT to help her write a poem and a best man's speech for a wedding she and her husband were attending.

I put in "write a poem about two people meeting each other on holiday and are getting married". And pressed the button. About six shot up. And I was like, "Wow!". And that's terrible, really, because it didn't come from the heart. It didn't come with any effort whatsoever. The registrar came over to me and said "I have to say, that was a beautiful poem that you wrote and read". I thought, "I'm so sorry, God". I just looked at her and said "Thank you".

Sally, 59

This was one example of participants using AI to help them with creative tasks, and the availability of such applications and tools has inspired more of them than before to use technology creatively (see Section 5.3, below).

Participants generally spoke positively about the AI tools they chose to use, but some were frustrated by AI features appearing uninvited within the technology they already rely on – such as AI assistants on smartphones. This was especially true for some older participants, who felt these functions were intrusive or made familiar tasks harder rather than easier.

Every second Gemini, or whatever it's called, pops up. "I never asked you to be on there." You swipe and get rid of it. And then, next time, it's still there.

Peter, 64

I don't know how to get to my photos... All the [app] icons disappeared. I don't know where they went. And now it seems I have to ask my assistant.

Elizabeth, 64

Although few participants seemed to have a clear understanding about the potential environmental impact of AI – either in the absolute or compared to other technology such as cloud storage – a handful expressed concern about this.

> *It just put an AI chatbot automatically on everybody's WhatsApp subscription. For them to work, they need massive data centres. The carbon footprint that is created is huge.*
>
> John, 39

1.2 Experiences of using AI assistants and chatbots in customer service interactions continue to be mostly negative

Last year, several participants spontaneously expressed their frustration at the deployment of AI chatbots on websites; these were considered to be largely unhelpful. We asked about this in more detail in Wave 21, but the feedback was broadly similar.

Although a few had experienced satisfactory outcomes for specific tasks, almost all had anecdotes about frustrating experiences. Complaints included not being able to get the help they needed, being sent round in circles and/or just being fed information they already knew.

> *Sometimes it's okay, but I think the most recent time I had to do it was for the dog insurance... I was trying to update it when we moved here to change the address and things, and it was like going in circles.*
>
> Brigit, 25

> *They tend to run out of ideas pretty quickly, and then you have to wait for a human element. And I think that's what's frustrating. You know, I do my due diligence beforehand. I'll check the FAQs or... any policies or whatever that help me get a step ahead as opposed to automatically going to the chat window.*
>
> Dai, 46

> *When you get involved with the chat box [sic], it's because you've been on the website, you've been through all the questions and answers, and the question you've got isn't answered. So then you go and ask this question. But they can only seem to answer the questions that are already on there. I dread them. I actually dread them.*
>
> Geoff, 74

One participant had a frustrating experience trying to renew his insurance policy via a chatbot, but was more positive about using it to make a claim.

> ***You can't really negotiate with a bot, can you? So, that didn't work out very well... I ended up requesting a call back. But it worked fine for the claim, which is obviously just a kind of objective "This is what happened. This is my policy". To be honest, it was a lot quicker than going on a call and waiting for someone to answer. So I found it useful in that sense.***
>
> Tim, 27

Participants were sometimes confused as to whether they were actually interacting with AI, a less sophisticated automated system, or even a real person.

> ***"My name is Miriam. I'm here to help you today." "That's good, Miriam, because I've got a lot of questions, darling." And so I put the first question in... "I'm sorry, I didn't understand that question." I thought "Oh, I'm not talking to a real person. I'm talking to a robot."***
>
> Sally, 59

In most cases participants ended up speaking to a real person to resolve their query or complaint. Some refused to even engage with the chatbot in the first place.

> ***"I am Paul, your AI assistant... AI also has to learn." And then you have to speak to it for ages. And I just say "Speak to someone, speak to someone, speak to someone, speak to someone" so many times this guy puts me through to someone in the end.***
>
> Dean, 36

This was a rare example of a participant being aware that their information might be used to train the AI system. Indeed participants more broadly demonstrated very little awareness of AI tools being trained on the information fed into them.

1.3 Some participants are concerned about AI being a threat to their jobs, and one has already been made redundant

Participants were conscious that one potential application of AI is to replace human workers, particularly those in more administrative-type office roles, and some expressed a level of concern about their own jobs.

> *So I do PA work and they can do diary management, but they can't do global work. Apparently it hasn't got that far yet, but it will. And that's what worries me now.*
>
> Suki, 48

One participant, who worked as a team manager for an online betting company, was made redundant in the past year as part of a business restructuring where his whole department was replaced by AI. Fortunately he has been able to find a new role in another company within the same group. He did not express any particular resentment about being replaced, and saw this as an inevitable consequence of technological evolution.

> *I was made redundant in July... It's very much a changing industry... We've got workshops on it [AI] this month and it's a massive part of strategy planning for the future... I wouldn't say I feel resentful because I knew for a long time it was coming, I suppose.*
>
> Tim, 27

He is attempting to future-proof his career by embracing AI, and encourages his new team to do the same.

> *It's about making sure that I evolve with it [AI] and making sure that the skills I have cannot be replicated very easily by it. That's definitely been my approach, and the approach I've been pushing on the guys I manage... making sure they don't try and fight it, I suppose, because you're not going to win.*
>
> Tim, 27

1.4 Parents are struggling to work out how best to guide their kids in their use of AI

All the school-age children of households in our sample are now using AI for personal use and/or to support their studies.

Parents expressed concerns about getting the balance right between equipping their kids for a world where AI skills will be needed, and more traditional learning and critical thinking skills.

With school it's finding that balance... There are tools that you can use for these purposes, but when do you use them and do you know how to use them in the most responsible way?

Dai, 46

In the old days, when you did your homework, you actually researched it yourself and wrote it down, whereas these days they [grandchildren] just seem to just ask AI what the solution is.

Geoff, 74

More specifically, parents were worried about their children "cheating" at their homework or coursework, and possible repercussions from this.

He's cheating with Maths every time, which really worries me. I don't know how he's going to get through his exams. AI can literally give him the answer every time.

Suki, 48

The schools were saying "Don't use AI, don't use ChatGPT". Some children had their grades disqualified because it was identified that they had used it.

Denise, 48

Mixed messages about what is and isn't acceptable were further adding to parents' confusion. There is not only different advice and policies between schools, but differences between individual teachers within the same school. One reported that, at her son's school, some teachers were forbidding the use of AI, whereas others were more encouraging.

I've noticed the Geography teacher already is "only books". She'll post the work online, but she'll make them write it in their books.

Suki, 48

Parents were also worried about children's ability to display the critical thinking skills necessary to identify when AI is feeding them inaccurate information. Many participants had seen examples of AI search results coming back with incorrect answers. They were able to spot these errors, but they were less confident that kids would be able to do so.

> ***A lot of the time, if I've looked something up related to my work it will come up with the summary. And a lot of the time it's very inaccurate. I'll have a look at it, because it can be quite useful as a pointer, but I would never think "That's 100% accurate".***
>
> Jenny, 32

One participant, an English tutor, quoted an example of a student's otherwise good work being undermined by what appeared to be ChatGPT "hallucinating".

> ***I was reading her draft and it was well written, and her voice was clear in it. But then there's this quotation that so perfectly fitted the point she was making. I remember reading the quotation and thinking... I don't really remember that being in Arcadia. I have my digital copy, so I was able to search the keywords in her quote. And they just didn't exist. I was able to recognise that because I'm teaching the text. But for a student, you will just kind of accept it as gospel.***
>
> Robert, 29

Lastly, and mirroring worries about the potential impact of AI on their own careers, some parents expressed concern about the future job prospects of their children.

> ***Go to uni, get a degree, come out. Everyone's looking for you. You're super employable. That will no longer be the case.***
>
> John, 39

> ***I've just watched a programme – I think it was Dispatches – about AI and jobs being replaced... I've got to get the kids into thinking about more manual kind of jobs, like electricians, plumbers – you know, stuff that AI can't replace.***
>
> Suki, 48

1.5 Participants claim not to anthropomorphise AI, but their language and behaviour does not always support this

We asked users about the nature of their relationship with AI and, in particular, the extent to which they ever felt like they were communicating with a real person when using it.

Participants emphatically claimed that they think of AI as a tool, nothing more. Nevertheless they often ascribed human characteristics to AI in the language they use to describe it.

> ***My friend loves ChatGPT. If she could marry it, she would.***
>
> Brigit, 25

One asked ChatGPT for advice about how she should feel and act when she broke up with her long-term partner.

> ***Even through my breakup I've been like "Should I be feeling this way? What do you think he's feeling?" Little things. Obviously I don't trust exactly what it's saying back, but it can be quite good... He [ex-boyfriend] messaged me about something and I didn't know how to respond. So I asked ChatGPT how to respond. And it [said] "Oh, I'm so sorry you're going through that" and then answered it. It wasn't like I was using that over actual human advice. And I don't think I would listen to ChatGPT over actual human advice either, but I think maybe I was using it as more of a confirmation.***
>
> Chloe, 25

Another described the loneliness of home working, and argued that it is understandable that people project their emotions onto the technology they're using.

> ***When you work remotely you are on your own in a room in the house with [only] the dog for company. And unless you've had a Teams call, or made a phone call, most of your day is going to be "Tap, tap, tap, tap, tap, tap", you know? You just want to appreciate that there is another human at the end of that interaction. Maybe thinking that you are talking to another person makes it less isolating.***
>
> Denise, 48

1.6 Participants claimed to have seen more AI-generated fakes and misinformation

The majority of participants believed that they had seen more AI-generated fake content and misinformation in the past year, examples are of public figures and sportspeople.

> *[Public figure]... Who the hell knows what's real and what's not where that guy is concerned? I recently saw a picture of him... And apparently he generated that one.*
>
> Denise, 48

> *I've seen some interviews with [Sportsperson] effing and blinding, saying this and that, and I'm thinking "That's not [him]". But people who don't necessarily follow [sport] but know who he is... will think... "Crikey. He's not a very nice person."*
>
> Mick, 51

There were mixed views on how easy these are to spot.

> *I do remember last year I was saying to you how I can easily tell if something's AI or not, but now it's getting to the point where even I can't tell if some things are AI.*
>
> Hazeem, 21

> *You see a lot of AI-generated videos or pictures now, and sometimes you can tell and sometimes you can't. I do laugh. You see things that maybe you're able to say "Oh, that definitely AI". And then you look at the comments and everyone's like, "Wow, that's amazing". And you're sitting thinking "Oh God!".*
>
> Brigit, 25

Media organisations like the BBC and social media platforms were praised for labelling some AI-generated content, but some participants were concerned that the inconsistency of this practice means that AI content that isn't labelled is actually more likely to fool people.

> *I've noticed on TikTok and some other platforms, they're starting to say that it's AI-generated, which I think is a good thing.*
>
> Denise, 48

The BBC sometimes comes up with things, doesn't it? "AI-generated" or "This picture is false", because they've got the technology to be able to determine. The likes of me and Joe Bloggs here... generally I don't think we stand a chance.

Donald, 71

Individual participants raised a series of other concerns about generative AI. These ranged from the risk of scammers cloning people's voices to AI image manipulation promoting unrealistic attitudes to body image.

They need to have some labels on AI content on all social media, because it's gonna just continue to push negative thought processes or set unrealistic standards.

John, 39



2. Viewing and Listening

2.1 Participants claimed to be viewing more YouTube (again) this year

Over recent waves we have reported consistent growth in the claimed viewing of YouTube, facilitated (in part) by the increased prevalence of smart TV sets in participants' homes. This growth has continued to the point where, for some participants (all of them men), YouTube is now their main (or only) form of viewing

So the only thing I use pretty much is YouTube.

John, 39

I'm more on YouTube than anything else. We've used it a lot for like demonstration and instruction videos, and then I use it a lot to watch podcasts and stuff... I'll just bang on YouTube a lot of the time in the background while I'm working.

Tim, 27

Users articulated a number of benefits. The YouTube algorithm, search function and channel subscriptions make it easy to find interesting content to watch, even compared to browsing through an EPG or streaming service interface. As major broadcasters share more of their content on YouTube, it has also become an accessible source of mainstream content (including free sports highlights).

> ***It's just easy. It's all centralised and it's got everything from everywhere. I think that's the beauty of YouTube... it kind of brings all these media options together and stops you having to go in and search it.***
>
> John, 39

> ***My subscriptions have gone up, from probably five last year. Now I've probably got 20 different people to watch. And that's from sport to football podcasts to car dealers.***
>
> Mick, 51

> ***I quite enjoy the highlights from various events. It could be for things like Ironman competition highlights, which were on recently. So I watched the full 45 minute highlights for that.***
>
> Dai, 46

Whilst in previous years YouTube was predominantly being used to access specialist content around users' personal interests, it now also seems to serve a broader range of viewing needs. These include "background" viewing (sometimes as a replacement for daytime TV) and videos about random, eclectic, interesting topics – serendipitous content discoveries traditionally associated with linear TV channels.

> ***I like to watch people play games, you know, the gaming in Las Vegas, where they spend hundreds on a spin. I saw one day somebody was doing $2,500 spins.***
>
> Peter, 64

And YouTube is not merely providing participants with entertainment. It is serving them with information which makes a meaningful and valued contribution to their lives. As an example, three participants had lost lots of weight this year, through radically different approaches: one had used the "skinny jab", another had followed an extreme fasting diet and the third had trained for an Ironman triathlon. All three had used YouTube extensively to inform their respective journeys.

I was researching to take the Mounjaro [jab]. I did go on YouTube and there's lots and lots of people with diaries, and showing their journey. You can literally watch them do it, and see how easy it is. I'm not very good at reading something and putting it into action. But if I see somebody do it, then it's easier for me. YouTube was so helpful in that.

Elizabeth, 64

I've researched this a lot, like the fasts and stuff... That Snake Diet bloke, he's called Cole Robinson. He is more of a motivator... Certain people say, "Oh no, this is too much!", but I watch him... I think it's funny and it is motivational. I've listened to his live streams for like six hours when I'm at work.

Dean, 36

It was a big investment, doing an Ironman triathlon, which meant the whole year in the run up. You're looking for tips and tricks, looking through videos of courses, guidance and stuff like that in terms of training. Those kind of things you don't tend to have on a TV, you tend to have on YouTube or streaming services.

Dai, 46

Three participants now pay for YouTube Premium. This is partly to get rid of the adverts, but also to gain access to added value functionality which suits how they want to consume YouTube.

Because I watch so much of it I was just like: "I've got to get YouTube Premium".

John, 39

There's no ads. There's background play. So if you swipe up the app, you can have a picture in picture. You can go on Instagram and still watch it. You can turn your phone off and still hear it. I like that part because I still fall asleep to YouTube videos.

Hazeem, 21

2.3 The role of streaming services is changing

With the exception of the three participants who have subscribed to YouTube Premium (see section 2.2, above), there were no significant changes in the number of streaming subscriptions across the sample in this wave, or the prevalence of particular services. Netflix continues to be the most common subscription, with Amazon Prime Video, Disney+, NOW and Apple TV+ also represented.

However, with the growth in viewing of YouTube, the role of streaming services does seem to have changed somewhat. In this wave participants reported more of their viewing as being on their own (including – but not only – viewing on mobile devices) with less shared/ communal viewing overall. Individual viewing was much more likely to be YouTube (and the majority of their YouTube viewing was on their own).

Participants frequently mentioned watching a film or drama series on (e.g.) Netflix as their typical shared viewing experience with their partner or family. This is a shift from earlier waves when participants often described themselves watching streaming services on their own, with shared viewing occasions frequently being devoted to programmes on traditional TV channels.

> ***When we sit down together in the evening and think "What are we going to watch?", Netflix is always the first port of call. YouTube is very much more for during the day, in the background. When we want to sit down and relax, it will most likely be Netflix or one of the other two – that's Disney+ or Amazon Prime.***
>
> John, 39

To some degree, therefore, streaming services are further supplanting the role of traditional linear TV in participants' viewing behaviour, especially as some claim that anything good on the BBC (etc.) will end up on Netflix eventually anyway. (This is used as one justification for not needing to pay for a TV licence.)

> ***There have been shows that have been recommended to me, but they eventually come on Netflix. So I just wait for them, really.***
>
> John, 39

In line with previous waves, some drama series on streaming services were praised for being at least the match of anything on the traditional channels (e.g. *House of Guinness*, various Harlan Coben dramas).

> ***If you look at Netflix, they've done the Harlan Coben books. They're really good and they're specific to Netflix. And Netflix tend to have the BBC stuff on, just later. I don't see a massive difference.***
>
> Denise, 48

The House of Guinness, that was absolutely brilliant. And after the first episode, you're straight on to your tablet... "How much of this is actually true?". It was good to see the scenes about the famine in Ireland at the time. Our friends who saw it were completely ignorant about that. It became a topic of conversation.

Sally, 59

The ultimate effect of these changes is a further decline in the claimed viewing of live TV (a continuation of a long-term trend among our sample), to the benefit of both streaming platforms and YouTube.

Netflix, Amazon Prime, Disney+, BBC iPlayer and 4OD, they're like the main apps that I use on the TV; I tend not to watch live TV at all. We do watch the news live but, apart from that, we tend not to watch any live TV at all and just stick to those apps.

Jenny, 32

2.4 Despite changes in viewing behaviour, Public Service Broadcaster (PSB) programming is still valued by many

Despite the changes in behaviour outlined above, many participants continue to value the content provided by Public Service Broadcaster (PSB) channels[2] and their respective streaming services, and numerous PSB programmes were singled out for praise, including *Riot Women* and *King and Conqueror*.

I've just watched King and Conqueror and that's on the BBC. Which I thought was very good. We watch Channel 4 because they do a world drama series, and we watch quite a few of those.

Geoff, 74

The Celebrity Traitors was on-air at the time of the fieldwork, and several participants were enjoying this greatly. One had only recently discovered the series, and he and his partner were planning their catch-up viewing of the whole back-catalogue of episodes months ahead to allow them to watch the finale of *The Celebrity Traitors* on New Year's Eve.

I'm on Series One. So I'm going to slowly watch it till we go on holiday with any luck. Then we're coming back on the 27th. Then we're going to watch the celebrity one from the 27th till New Year's Eve.

Dean, 36

[2] BBC channels, ITV1/STV, Channel 4, Channel 5 and S4C

I'm watching Traitors. Alan Carr is a gem. And Celia Imrie farting... I watched that back three times.

Elizabeth, 64

Although the role of PSB channels in participants' day-today viewing has been squeezed, there still seems to be an important role in the viewing repertoire of many for "event" programmes at particular times of the week (e.g. Saturday night entertainment) or year (e.g. major drama series in the Autumn).

It's like I wait for September. I wait for Strictly. The different dramas that are coming up over the winter months.

Sally, 59

Strictly Come Dancing. I do like that because that's just airy fairy. Everybody's happy and they're dancing away, and I love the show.

Cathy, 81

We're excited now because this Saturday is The 1% Club. We love The 1% Club. We're very good at it. It takes us two-and-a-half hours to watch it because we pause it.

Sally, 59

2.5 Participants claim to be listening to less radio but consuming more podcasts

Listening behaviour among our sample tends to fluctuate year-on-year, often due to changes in individual circumstances (e.g. participants spending more or less time commuting to work). Many claim not to listen to the radio at all and, in this wave, two of the more committed radio listeners reported that they have switched much of their listening from radio to music streaming and/or podcasts.

I still listen to podcasts daily, I would say. Radio? Not so much. Only in the car going to work.

Jenny, 32

Sometimes I do at work, but not very often any more. Like I say, if we do [listen], at work, I put Spotify on a quite a bit more now rather than listen to radio at work.

Mick, 51

Increased access to technology such as CarPlay has made it much easier for participants to listen to podcasts or music in their cars, and this has further impacted claimed radio listening (In-car listening was previously the source of much of our participants' reported radio listening).

> ***Because I drive a lot for work I'll go through phases of listening to music and finding a collection of songs or an album that I really like... I'll listen to it until I'm fed up of it, and then I'll go back to podcasts.***
>
> Chloe, 25

Around half the sample now claim to consume podcasts more or less regularly (this includes some watching video podcasts on YouTube). These cover a diverse mix of subjects and come from a broad range of producers including broadcaster-created (often via BBC Sounds), those made by major independent production companies, and those produced by independent content creators.

> ***Where I drive to and from work, that's like an hour drive. So I've started listening to podcasts more and more. And predominately it would be the Diary of a CEO... on Spotify.***
>
> John, 39

> ***The News Agents, Louis Theroux Podcast, The Rest Is Politics, The Rest Is Entertainment. These are like my go-to comfort ones.***
>
> Jenny, 32

Listeners engage strongly with their favourite podcasts, and praise them for being informative, educational and entertaining – qualities that might traditionally be associated with PSB content.

> ***I love The Rest Is History, I think it's probably the best podcast ever made. They did a really, really good series recently about the first year of World War One. I think it was like six hours of content. And I think I listened to it all in a day or two... The quality of that podcast is just unbelievably good. It's always well-researched. It's always funny. And... there are so many episodes, it's kind of unbelievable.***
>
> Robert, 29



3. News, Authority and Trust

Understanding participants' ability to think critically has become an increasingly important part of Adults' Media Lives. In an attempt to explore how they decide what they can and cannot trust, and what characteristics make an information source authoritative, we added two pro-forma exercises to the discussion guide for this year's interviews (Annex 1).

The first asked them to identify which type of information source they trusted most for different kinds of content.

PRO-FORMA A

Please choose – from the following types of information source – your "most trusted" and "least trusted" sources when it comes to different types of information

	Hard news stories (e.g. national politics or conflict overseas)	Entertainment or sports news	Reviews/ recommendations about a particular product or service	Important information for your daily life (e.g. health or finance)
Broadcast TV/radio				
Podcasts				
YouTube				
Specific websites or apps				
Social media				

The second asked them to rate the importance of different characteristics in terms of helping them decide whether a source can be trusted.

PRO-FORMA B

Thinking about why you trust some sources more than others, how important are each of the following characteristics?

	Not at all important	Not very important	Quite important	Very important
They tend to be the first to publish the information				
I tend to agree with a lot of what they say				
They provide a lot more detail than other sources				
The information they publish is reviewed and edited				
They present the information in my kind of language				
I have used them for a long time and have grown to trust them				
They specialise in that particular subject				
Other people I know have recommended them or also use them				
I see their content shared a lot (e.g. on social media)				

Because of the small sample size we are not reporting any quantitative results from these exercises, but they proved to be a useful prompt to a more granular discussion of notions of trust and authority than might otherwise have been possible.

3.1 Participants source news from an increasingly disparate range of information sources and platforms

Over recent years we have seen participants access more of their news online, including via apps and social media, and from an ever more diverse range of sources including, but not limited to, the traditional broadcast news brands. For a few participants, this allows them to hear different opinions and weigh up different viewpoints.

> ***The main resources I'm using are still Novara Media, and Zeteo News now. I do actually still watch Piers Morgan sometimes, just to see... which angle he's coming from. And it also forces me to take in a lot of opinions and views that I might not necessarily search for.***
>
> John, 39

> ***I wanted to get both sides. So I started to watch Fox and a few things that I didn't agree with.***
>
> Elizabeth, 64

However, most participants stick to a small repertoire of sources, or don't actively seek out news at all, relying on their social media feeds to keep them informed.

> ***If something happens, I think it is quite hard to avoid knowing about it because it would be plastered over all your social media.***
>
> Chloe, 25

> ***The news I need or that will impact me I will find out either way... whether I'm following actively or not. It does come up on Instagram or come up in conversations with friends and family.***
>
> Hazeem, 21

Some have chosen to access their news content via YouTube, arguing that it presents a more diverse range of views than the mainstream media, and covers stories that the mainstream media channels ignore.

> ***Who tells me what's right and what's wrong... is it true or is it not true? Some of the things on YouTube are independent. I find I would listen to them more, because they're on the ground. They're telling you the story.***
>
> Peter, 64

I'd still go to YouTube because it's the place you can get the most volume of information from different sources that I understand. And then you can say to yourself, well, there's more people saying this than saying that, so surely there must be something in it.

Elizabeth, 64

Some place a high degree of trust on viewer comments as a means of "regulating" factual content on YouTube (and some social platforms).

If you see something on social media, whether you believe it or not, you can go to the comments and see everyone's points... If most people agree with it, you know you should be at least somewhat agreeing with it.

Hazeem, 21

There is also confusion about the extent to which content on YouTube is regulated by the platform owner.

I know that YouTube has things in place where you'll just get struck off if you're doing or saying something that's not right.

Elizabeth, 64

3.2 Many participants are less engaged with the news compared to last year, and some have lost faith in news media

Many participants claimed to have engaged less with news this year. This seemed to stem at least in part from a sense of "news fatigue" with the ongoing conflicts in Ukraine and Gaza, and the constant stream of upsetting and (sometimes) confusing reports coming out about those conflicts.

Every time the news comes on, I always turn over, because it's too depressing. The world is too depressing at the moment.

Elizabeth, 64

There's a lot going on that I find really confusing at the moment. Trying to understand what's happening in Israel and Gaza and Palestine. Who is the good guy? Who is the bad guy? "What's actually going on?"

Denise, 48

Another factor was participants' scepticism about their ability to trust what they see and hear in the media – although opinions differed widely about which elements of the media justified their scepticism. Some had lost faith in the mainstream media; others were more concerned about the credibility of the plethora of independent, unregulated creators generating "factual" content. This was exacerbated by the growth in AI deepfakes and misinformation.

> ***Well, I would trust... certain members of my family and certain members I wouldn't trust for different things. So how can you through a screen trust everything you're watching? You can't.***
>
> Cathy, 81

> ***It seems to everyone that it's an agenda, like the government's behind an agenda... it's like a brainwashing tool for the government. An illegal immigrant killed someone in the street the other day, stabbed them to death... And it's all over Facebook, all over YouTube. And the news hasn't even said anything about it.***
>
> Dean, 36

> ***When it's broadcast TV, radio, everyone's singing from the same hymn sheet. In fact, it's just showing the same pictures. And it's sanitised.***
>
> Elizabeth, 64

The motives of content creators and platform owners were sometimes called into question.

> ***In some ways, there are more brazen and malign actors who have a vested either economic or political interest in presenting information in a certain frame. And it might even be something as trivial as they are trying to generate views for their page or their profile. And the best way to do that is to rage-bait.***
>
> Robert, 29

3.3 Participants are unsure of what is “authoritative”

The way some participants choose to evaluate the news content they watch on YouTube may run counter to how we traditionally view news, but it is quite consistent with how most evaluate other informational content. For a subject like health and fitness, for example, seeking out authoritative individuals to follow, relying on visual evidence to make your own mind up, and trusting in the “wisdom of crowds” are the common *modus operandi*, and participants were much more likely to turn to a specialist website, podcast or YouTube in preference to broadcast TV or radio as their first port-of-call for trusted content of this type.

> ***If I was interested in running and how I'm going to create a good daily routine, then I would go and actively search for someone that has got the life or got the routine that I want, or has got the results that I want. And if they have their own podcast and then they’re talking from experience, I would trust that more.***
>
> Chloe, 25

> ***If I've got an injury from doing pull ups, or I'm looking at the best walking poles to use, I find it's [Reddit] a really, really great website because it attracts clusters of people that have these niche interests. And generally people's posts are quality controlled by people liking or disliking them. The most liked post floats to the top of the pile. You know that there is a kind of consensus behind the most popular post and why it's the most popular.***
>
> Robert, 29

More widely across the sample, there were contradictions between how they talk about assessing the trustworthiness of sources, and what we know about their actual behaviour. So, for example, in the pro-forma exercise, most participants claimed that a high level of detail, and information being reviewed and edited were “very important” factors in building trust. But this is not necessarily reflected in how we know some of them consume news.

3.4 Trust in news sources is becoming more fragmented

Over half the sample still think that the main broadcast media brands are the most trustworthy source for “hard” news stories like UK politics or conflict overseas. There is still widespread awareness that there is an obligation on these brands to provide balanced, impartial and truthful news coverage, and a regulatory framework is in place to reinforce that obligation.

> ***I know the BBC, ITV, Channel 4 are regulated. So I would generally choose regulated.***
>
> Dai, 46

If you look at the others on the list, they've got no protocol. They can say what they like. But broadcast TV, they have a duty of care to report correctly and honestly.

Sally, 59

Brand is more important than platform. So, for example, trust in BBC News, Sky News or Channel 4 News remains broadly consistent even if they are being consumed via an app or website. And these brands are much more widely trusted than smaller TV news channels such as GB News or Talk TV.

It kind of depends on which TV channel, which YouTube channel, which specific website.

Julia, 37

It depends what broadcast TV and radio. It's not necessarily the platform. It's more the provider.

Dai, 46

However, a small but sceptical segment of participants are deeply mistrustful of the mainstream news media. These participants have faith that the user-generated footage they see (usually on YouTube) is first-hand evidence of what is going on in the world, free from corporate or government influence. They sometimes name-check specific "citizen journalists" (such as Mayhar Tousi, Adam Mockler and Charles Veitch) as trusted sources.

There are independent journalists on YouTube who are on the streets showing people what's actually happening. They can video what they're doing. The mainstream media is dead.

Dean, 36

Mainstream news... They only tell you what they want you to hear, but they're not giving you the full story.

Paul, 64

The language used by individuals in both groups suggests that participants are becoming more "tribal" about their choice of sources, and increasingly entrenched in their views.

Because the internet is so broad and varied now... whatever your mindset is, you can find something to validate your thinking. I don't get any news that will change my mind about anything.

Dean, 36

I think you seek out news – or you naturally gravitate to news – that represents your views. I mean, to me, Channel 4 is less biased and maybe represents my views more. But if you're served something on Facebook that doesn't align with your views, you're just not going to click on it. I mean, I'm just not going to click on it.

Julia, 37

3.5 The BBC has become a lightning rod for shifting attitudes

The BBC remains the most widely trusted news source, and its supporters among the sample claim that it is performing generally well in very challenging times.

If I had to choose out of all of them who I favour most it's the BBC. I know it gets a lot of stick, but I still feel that the BBC does give a very honest appraisal of the news, mostly.

Geoff, 74

Well, I think BBC are quite well respected abroad. Like just now with all this stuff in Israel and [Gaza]... it's been the BBC that I've been watching.

Cathy, 81

I'm still a pretty big fan of the BBC, I think. It puts out consistently really high quality stuff. Impartiality is obviously difficult, but I think it actually does it. It toes the line pretty well in general.

Robert, 29

Almost all participants expect the BBC (in principle) to perform to a higher professional and ethical standard than other news organisations, but opinions differed as to how successfully it does this.

Sometimes mistakes can happen, but it depends who it's from. Like, if a mistake happens from BBC, you know, it's a big thing because, you know, it's a big process of how something can get published. Whereas if a mistake happened from a random social media channel, it's likely that it's just one person behind that. They might make an honest mistake. Whereas BBC, because it's publicly funded, there shouldn't be any bias.

Hazeem, 21

Several participants praised BBC Verify as a service they value in a world of misinformation.

> *I know we keep going back to the BBC website, but they've got that fact check thing now, haven't they? Some articles I've read will say that, you know, the source is fact checked.*
>
> Denise, 48

However, elements of BBC News output were criticised.

Perceptions of bias in its coverage of the conflict in Gaza have eroded trust, particularly among those most sympathetic to the Palestinian cause.

> *They're very... on one side of reporting, I guess. They don't show everything. They don't show the truth. There have been recorded parts where they have tried to silence certain people.*
>
> Hazeem, 21

> *I've lost a bit of trust in those channels... The lack of balanced reporting with regards to news, has made me a bit more disenfranchised. I feel the conflicts in Ukraine and Gaza haven't had the same level of coverage.*
>
> John, 39

Others criticised what they considered to be the BBC's "woke" agenda, excessive support of minority communities, or selective coverage of issues like the public opposition to migrants.

> *Even the BBC News over here in Northern Ireland it's all one-sided.*
>
> *[Interviewer] Whose side are they on?*
>
> *Not mine! There again you know, it's all about immigrants and this, that and the other. People over here have had enough.*
>
> Peter, 64

There were mixed views about the value of the licence fee. These were not exclusively linked to participants' attitudes to BBC News, but often reflected the latter. Some participants continue to be strongly supportive, while others either do not pay or resent having to do so.

> *Apart from people who are over the age of 50, I don't know anyone who pays the TV licence.*
>
> Dean, 36

I'm a good, abiding citizen. And I know you need to have a licence. So, yeah, on that front, I don't think I'd like to be caught if I was watching news, you know, and I'm on the BBC, so I'd rather just pay it and not have to worry.

Suki, 48

There was no change year-on-year in the number of participants claiming to pay for a TV licence (around a quarter of the sample do not), but more participants than in previous waves are considering opting out next year. Their claimed motives varied from a lack of perceived value-for-money, to a loss of trust in the BBC as an institution.

The BBC used to be the only programme that everybody watched, and you felt as though you were getting more value for money. I mean, I know things cost a lot of money to make, etcetera, etcetera. But I still have this reluctance to pay. If I could find a way not to do it... I would.

Donald, 71

[Interviewer] Are you paying for a licence fee?

Yeah.

[Interviewer] How do you feel about that?

Annoyed... Jimmy Savile... sorry! Gregg Wallace... sorry! Huw Edwards... sorry! You know, it's just more of the same. You know what I mean? It's not the programmes. It's just the organisation.

Elizabeth, 64



4. Privacy, security, harmful content and online safety

4.1 Some participants have become more cautious about personal data and privacy this year

Whilst we typically see little change year-on-year in participants' attitudes to personal data, privacy and security, there was some evidence this year of an increased awareness of privacy and security issues, particularly among those who work from home and/or have office-based jobs. This seems to be at least in part driven by employers' requirements for them to observe stricter security measures at work.

> *I feel like myself, as I've gotten older, I've kind of enjoyed privacy more so, and I think that's just continuing on. I think privacy is an asset.*
>
> Jenny, 32

I think it's something you consciously care about and then subconsciously forget about in terms of your personal data, if I'm being honest. Whereas with work it's always much more of a conscious thing... You don't forget about it because you'll end up losing your job.

Tim, 27

There was a heightened level of concern across much of the sample about potential cyber attacks in the workplace. Participants recalled several high profile examples (e.g. Jaguar Land Rover, Marks and Spencer) being in the news in the months leading up to the fieldwork, and one participant had been directly affected by an attack on his employer.

We had a cyber attack at the beginning of the year, the same time Marks and Spencer did. I think it took us about four months to get it all back. So for four months it virtually stopped our work. It was really, really bad.

Mick, 51

My company are really good. They test us every week. They'll send you an email. And, you know, sometimes you get sucked in... you click on it, and then you end up having to do an exam. It teaches you a lesson that you won't do it again and you'll be more cautious.

Suki, 48

As in previous waves, participants expressed frustration at the frequency at which they have to give their personal data to apps and websites, click on cookie notices, etc. Many still just quickly accept whatever terms and conditions are presented to them and move on.

When I was in business, obviously the terms and conditions were critical to us because we were selling big machines into blue chip companies who had loads and loads of terms and conditions, and we used to go through them word by word. [Now] These tick boxes... "Tick the terms and conditions". You know that, in all honesty, you might be ticking something you shouldn't be, but you'd never do anything if you didn't do that.

Geoff, 74

But there were numerous examples this year of participants opting out of using certain apps or websites out of reluctance to share their data.

> *You tend to find any sort of website, especially shopping websites, it'll pop up straight away "Put in your email address for 20% off", or something like that. And probably years ago I'd have been like "Yes... a discount!" Whereas now, I wouldn't do that.*

Brigit, 25

> *There's actually a talkSPORT app. So I was just like "Cool, I'll download the app and listen to it". And then it said, as soon as I downloaded the app, "You need to sign in... give us all your details". And I'm just like "You know what, I'm not bothered". Because there's so many nowadays. I don't understand why so many different companies need my personal data.*

John, 39

Some participants have also become more circumspect about what and how they post on social media. Some have stopped posting altogether. Others talked about favouring platforms or functions with a limited data footprint (e.g. posting on Instagram Stories, where the post has a limited lifespan, rather than "on the grid").

One participant (previously a prolific social media user) who got married this year was particularly concerned about sharing photos and videos of her wedding.

> *When I got into the whole wedding world, I realised how much people share of their entire day, like their wedding videos and stuff. When I spoke to the photographer and videographer I rewrote the contracts to say "You cannot share anything without explicit consent from me". So I think they must have thought I was an absolute freak.*

Jenny, 32

4.2 Participants are still exposed to a plethora of phishing attempts and other online scams

Participants continue to receive many fake delivery emails, spam phone calls, WhatsApp messages, etc., but generally believe they have become quite good at spotting these.

> *There are so many scams coming through, not just on a weekly basis, almost on an hourly basis.*

Sally, 59

The most recent ones I've been involved in seem to be chains. So they come in as a group message. And there's so many different numbers on the group message. And I'm just like "Well, no! Leave, block, delete". I try to block every number in the chain.

John, 39

I'm going through a run of spam calls at the moment. I think I've had about 10 or 12 in the last couple of weeks. I don't answer any unknown number. Because my view is, if somebody is calling me and they want to speak to me and I don't answer, they'll leave me a message. So that's my rule. That's my principle. I have fallen foul of it because the doctor phones and it's an unknown number.

Geoff, 74

Some participants also noted that technology does an increasingly good job at filtering and flagging such content

Emails... you get them all the time. Thankfully, they do seem to be quite good at just like... automatically they'll go to your junk now.

Brigit, 25

Some, but not all, are taking proactive measures to protect themselves (e.g. opting into two factor authentication where available).

I change all my passwords quite often, and I've got double factor authenticator [sic]... I try and be quite tight when it comes to my security.

Jenny, 32

Despite such precautions, there were three reported cases this year of participants (or their close family) falling victim to scams. Two were linked to Facebook ads. In the first example, a participant tried to buy tickets for a Coldplay concert via a ticketing site advertising on Facebook.

I bought some concert tickets and it was a fake site, so then I had to go through the credit card company to get the money back. It looked like a totally original site. And then it turned out that there was no one on the other end of it. I contacted Facebook to report it. They don't do much. I think they're just getting adverts at the end of the day.

Suki, 48

The elderly mother of another participant was scammed ordering clothes from a website purporting to be the fashion retailer Roman, again advertised on Facebook.

> *My mum was online on Facebook, and there was a thing about a Roman sale. Now, these companies advertise legit on there, and it says it's sponsored and things. And I've said to Mum "Always look for the trust tick or the padlock". You know? And Mum clicked through and it was a really good sale. With hindsight, a too good to be true sale... It had the tick, it had the padlock. It said Roman on there. It looked like the website. She ordered the stuff and it went through to a company in Shanghai that wasn't Roman. She didn't get the products, and she had three lots of money taken out of her bank account.*
>
> Denise, 48

Another participant was scammed when using a fake QR code on a parking meter to attempt to pay for parking.

> *"I'll pay for two hours." It took me off of that website and took me on to another one, and I didn't even know it had done it... It keeps on trying to take money out. I'm having a heart attack. And the thing was, I was literally going to my bank. That's why we parked up.*
>
> Sheila, 52

Although in all three cases participants were able to get their money back via their bank or credit card provider, such experiences are a further factor in creating a climate of mistrust around online content and platforms.

> *I don't want to get to the point where you don't trust anything, but it's getting close to that, isn't it? I think.*
>
> Denise, 48

4.3 Participants have been exposed to various kinds of harmful content, and reactions differ

As in previous recent waves, none of our participants had been subjected to any kind of online abuse or harmful content directed at them personally over the past year. However, many reported that they had been exposed to content that they considered harmful or upsetting – usually graphic images of violence.

Some of this was considered a kind of “necessary evil”. Content relating to major world events – such as footage of what is happening in Ukraine or Gaza – can be upsetting, but some participants prefer to see it anyway.

> ***Sometimes when I do see things that upset me... My first port of call is like “Maybe I should break away from this”, but I was like, “You know, I actually need to keep myself involved with this because then I'm more inclined to want to help to change these people's reality”.***
>
> John, 39

Less welcome was exposure to graphic footage of the killing of Charlie Kirk, an American political activist, in September 2025. Those participants most active on X and TikTok had all seen it. Participants said they had found it almost impossible to avoid. Participants reported that footage was served to their timelines almost immediately and with no apparent content warning.

> ***There was like actually really, really graphic extreme footage from I don't know, maybe a few metres away.***
>
> Robert, 29

> ***You were just scrolling through and before you’d even really realised what you were looking at, you'd seen it.***
>
> Brigit, 25

Some participants were personally upset by seeing the content. Others were more concerned that it might be freely viewed by younger users.

> ***When Charlie Kirk was shot, that really took me back how it was immediately on TikTok, and it came up on my algorithm and it was shocking. It was absolutely horrific. And I thought, “If I'm seeing this, loads of people, you know, kids are seeing this”.***
>
> Jenny, 32

> ***So it wasn't that I was offended by it, but it was more the thought that there's a lot of messed up stuff on the internet, and this is kind of on a mainstream platform.***
>
> Robert, 29

None of the participants reported the footage to the platforms in question. This may have been because they just wanted to move on from it as quickly as possible.

> *I think I was that shocked I just sort of scrolled on... because I didn't want to watch it. You know the way TikTok sort of loops?*
>
> Brigit, 25

However, it also tapped into a broader sense of apathy about complaining. Some participants were sceptical about how seriously platforms take complaints, others suggested that certain platforms deliberately encourage extreme content because it drives traffic.

> *You report it, you don't really hear anything back. Or you'll hear something back and it'll say, "This doesn't come come under so and so and so and so". So the ones that they must have got rid of or whatever, you don't hear.*
>
> Sheila, 52

4.4 Awareness of the Online Safety Act was limited

We tested participants' awareness and understanding of the Online Safety Act and, specifically, the introduction of Highly Effective Age Assurance (HEAA). Few had a clear understanding of either, and some confused HEAA with the public debate about the potential introduction of digital ID, which was a live topic during the fieldwork period.

When prompted, almost all participants were supportive in principle of stricter age checks for relevant content and platforms.

> *For adult websites they've changed it so I think they have to enter personal details, which I think is fantastic because I think that's a kind of misunderstood problem with the younger generations. And I think access to that is so, so toxic.*
>
> Jenny, 32

> *I think that it's right, absolutely, that there are checks and measures in place. There have to be.*
>
> Denise, 48

But most were dubious about how effective these would be in practice.

> *It will not stop younger people going on the internet, because that is the world now.*
>
> Chloe, 25

The principle is great, but they'll find a way around it. I mean, no doubt, teenagers will find a way around it.

Julia, 37

Once you've made something so that someone can't see it, they'll want to see it even more, won't they? So they'll just get someone else to log in on their behalf.

Elizabeth, 64

Several participants claimed to have come across age assurance measures in their own use of apps and websites, although again there was some degree of confusion between content-based restrictions and the requirement to prove your age to be allowed to use (e.g.) betting apps.

I just had to take a photo and it said "Yeah, that's fine". But I thought, if that's a 16-year-old... "Dad, could I take a photo of you?" "Oh yeah, there you go." And they're on. I thought, well, that's a bit... daft.

Mick, 51

Many participants had concerns about the security of the data being collected, and several claimed to have heard that the system has already been hacked.

When somebody has entered their their personal details, who then holds that data? There are people whose jobs in the world [involve] getting up in the morning and thinking "How can I break the system?". And that breaking the system could harm a lot of people. So I feel like having all that data centralised in one place, for me, is a risk.

John, 39

One participant in particular had stopped viewing content from the Ukraine conflict posted in a Reddit forum because he didn't want to use HEAA.

Sometimes the footage is quite graphic. So you now have to verify your age. You can use a driving licence or a passport, but I'm sort of like, "There's no way I'm sticking my passport details in a random website".

Robert, 29



5. Use of digital devices, platforms and services

5.1 There were relatively few cases of participants upgrading their core media technology or switching provider in the past year

Compared to many previous years, there were relatively few cases of participants acquiring new kit or upgrading their main media hardware. Most mobile device upgrades this year were driven by necessity (e.g. broken devices, or the need to upgrade to run specific apps). This is consistent with what we reported last year.

Again, as last year, participants claimed to be doing more with the devices and services they already have. Several mentioned that they were using more apps than before, and certain apps (e.g. Slimming World, Duolingo, TUI) were mentioned as new acquisitions in several interviews.

> *I use Waze, the travel app, in the car in the morning. It tells me the best way to drive to school to try and get there on time. Then in the evening I use Duolingo, WhatsApp to communicate with friends, and Instagram... just for pleasure really.*
>
> Suki, 48

Two participants also mentioned that they had switched to using the camera on their phone (with cloud storage, if required) instead of a digital camera.

> *I take [photos] on my phone now. I've got a camera, which is probably better than my phone, but it's not as convenient.*
>
> Geoff, 74

The most common hardware upgrade mentioned was TV sets. Several participants had upgraded one or more sets this year, possibly reflecting the move to watching more streamed content, especially YouTube.

> *We have a gym set up in the garage, and we've mounted a TV on the wall, directly in front of the treadmill, as an incentive for me to get on. I would maybe put YouTube on there for music, or podcasts.*
>
> Brigit, 25

Similarly, there were few changes in service provider this year. This is different to last year, when there had been a number of cases of participants changing broadband provider, often triggered by door-to-door selling from new and/or local suppliers of fibre broadband.

5.2 The use of smart technology continues to grow slowly

Two participants had acquired smart doorbells in the past year, and users continue to enjoy the benefits of smart thermostats (although there were no new users this year).

> *We have a Ring doorbell. We don't pay the monthly subscription to get the continuous feed. I think we got it as a deterrent. I don't know if it works, but all the homes round here have them, so we use it for that as much as anything else.*
>
> Julia, 37

Three participants had upgraded their smartwatches, and these are seen as playing an important role in health and fitness regimes. In this context they are usually used as part of an "eco-system", linked to other devices and apps like Strava or TrainingPeaks.

> *I've got an Apple Watch, which I just use for going running in the morning. I link it to Strava, and then when I get back I save it to my phone.*
>
> Mick, 51

> *I've got a new watch, which I used for tracking fitness in the run up to the Ironman. It's a Garmin. It's pretty well equipped, and then there are the integrations with things like Strava, for sharing information with friends, and with different bits of kit as well. So I've got a separate heart rate monitor, bike computer... multiple gadgets within that fitness eco-system.*
>
> Dai, 46

In contrast, the novelty of smart speakers seems to have worn off somewhat. They are being used less than before, and in a more limited way. This is another factor in the claimed reduction in radio listening this year. Nevertheless, smart speakers continue to serve a useful purpose in the homes that have them, notwithstanding some misgivings about privacy.

> *I still have an Alexa, but I have to switch it off because we're not allowed to have them on when we're working, which is interesting... I usually use it for timers and music when I'm cooking. Or the radio on a Saturday morning. That's it.*
>
> Jenny, 32

One participant described her daughter mimicking her use of the family smart speaker in much the same way that participants have previously described children copying their use of mobile devices.

> *She uses it to put her own music on. She's got a little toy kitchen, and she's watched us in the kitchen, so she'll put something in her oven and say "Alexa, five minutes". So she quite enjoys it. It's her toy as much as anything else.*
>
> Julia, 37

5.3 Participants are using technology more for creativity and learning, in part inspired by AI

Last year we reported an increase in participants using technology for creative purposes, particularly the use of user-friendly design tools such as Canva. This year, again, a few participants had used Canva to create (e.g.) invitations and graphics for social media.

> *Canva is a big thing probably that I would use on it [iPad]. I used it to make our "Save the Date" cards and then used an online printing service to print them out... and saved a fortune.*
>
> Brigit, 25

A new development this year was the use of generative AI to create artwork, designs, mock-ups of room layouts, etc. Often this was driven by a specific need, such as university course work.

> *There is one module where it's a group project, and we have to design an item to sell to investors... Ours was football kits. So I used ChatGPT to actually show the football kits. I gave it a prompt. And then I used a video AI and turned it into an advertisement.*
>
> Hazeem, 21

> *I was designing the club competition leotard and I was like, "I like part of this and I like part of this". So I just realised that you could just send it [ChatGPT] pictures and then it would create something for you.*
>
> Chloe, 25

Others were just dabbling with AI tools, mainly out of curiosity.

> *I've used software now for colorising black and white pictures, enhancing pictures, trying out all these sort of technologies. I don't actually pay for them, which I suppose is is an error, but I use all the free versions and see how they come out.*
>
> Geoff, 74

> *I used it with my daughter to create covers for some of her workbooks. As a quick means to do something creative but not have to spend hours doing it.*
>
> Dai, 46

There were also examples of participants using AI creatively to support their learning and personal development goals. One had used AI to help her prepare for a job interview. Another was studying for an exam and asked ChatGPT to prepare mock tests using a past paper as a prompt.

> *I had never used it until two months ago, maybe, when I was interviewing for jobs. I used ChatGPT, using the job description to help me come up with questions and answers.*
>
> Brigit, 25

5.4 Participants continue to look for ways to use the internet proactively to try and generate income

Online marketplaces such as Vinted were not being as widely used for casual buying and selling as in previous recent waves, but a few participants continue to try and use them semi-professionally as a way of generating supplementary income.

> *I've sold, like, 200-something pairs of shoes and football shirts. So I'll go on Vinted and, like, every now and then something cheap comes up and I buy it off Vinted and put it back on when I get it for more expensive. Or I go round the charity shops.*
>
> Dean, 36

Another participant had set up a business selling perfume via Facebook as a university gap year project.

> *I've been using Facebook a lot more, but that's for the business. So I've been joining perfume groups, selling and buying on there.*
>
> Hazeem, 21

One participant was even dabbling in Bitcoin mining. This is a shared activity she does with her sons.

> *We're Bitcoin mining at the minute. You have to do adverts and you have to do links and you have to do tutorials, and all the rest of it. And we have made about £80 doing it.*
>
> Sheila, 52

5.5 Screen time remains a concern for many participants

In line with previous waves, many participants this year claimed that their screen time is high, acknowledging that there is an addictive quality to their use of devices. However, more participants than previously expressed a degree of concern and/or guilt about this.

> *Screen time is still high, but we're working on it. My husband's the same, he wants to cut down his screen time so he set timer limits on my phone. Didn't work. As soon as the limit came up, I was like, "Ignore".*
>
> Jenny, 32

> *I'm just in a bit of a habit of doing it now, rather than I'm actually enjoying what I'm looking at.*
>
> Chloe, 25

Those who spend much of their working lives looking at a screen feel that high screen time is an inevitable consequence of their job, despite any misgivings they may have.

> *All my reading is on a screen. All my work is on a screen. If I'm playing chess or Catan [online strategy game], that will be on a screen. And then obviously if you're watching stuff that's by definition on a screen. So, as a result, it just becomes more and more and more. It's one of those things where you're conscious of it, but it's quite difficult to escape.*
>
> Robert, 29

As an antidote to excessive screen time and the intrusiveness of mobile devices, messaging apps, etc. several participants described themselves taking steps to deliberately spend time away from their phones.

> *There are times when my screen time is extremely high, which is... not what I want, but not something I have major control over. But we've tried to offset that by reducing screen time in other ways, watching less television or taking the dog out for long walks. When I finish work now I'll just get out. I don't even take my phone with me.*
>
> Tim, 27

> *When it comes to the evening, I like to put my phone and my watch in the other room... just to be undisturbed because it can be almost like a bit of a sensory overload. I don't want anything or everyone to have that much access to me all the time.*
>
> John, 39

Another described herself rationing the use of certain apps by (temporarily) deleting them, although this was only partially successful.

I'll get my weekly screen time report and it's been like 4 or 5 hours a day. And then I'll delete Instagram from my phone, and only use it on my laptop. That does work quite well because it means that I can still see my friends' family holiday pictures or wedding pictures or whatever, but I don't... fall into the pit of mindless scrolling. But then I'll be out waiting for a train or something, and be a bit bored, download Instagram on my phone and fall into that cycle again.

Julia, 37

5.6 Participants expressed limited enthusiasm for social media compared to previous years

One participant had left social media entirely in the past year, and many others claimed to be using it less than in previous years. Their use of Instagram and Facebook in particular was now more limited and targeted – posting less and, in some cases, focusing on specific features (e.g. participating in area-based groups to keep abreast of local news and events).

I came off Facebook. I'm not on Messenger, I'm not on any of those chatting apps. Anything like that.

Sheila, 52

My sisters do a lot of musicals, so maybe I would share that they're selling tickets or things like that. But other than that, I'm posting something very rarely now, which is funny because when I was younger, I would have been posting what I was eating for dinner.

Brigit, 25

I wouldn't have even posted my wedding really. But I had to because... There's like an etiquette. Nobody else can post your wedding until you've posted. So my friends were like, "Please post, it's been like a week".

Jenny, 32

We are part of a [local] Facebook group. So, on Sunday morning, we woke up and someone had posted videos of their Ring doorbell footage, which was of four lads basically trying to break into their house and steal their cars.

Tim, 27

There was also a subtle, but significant, shift in the language used by participants to describe their social media use. The experience seems more functional and less enjoyable. Even TikTok (the platform which has been growing in claimed use over recent waves) seems to have become less of a guilty pleasure and more of an unconscious habit.

> ***I do do it. But not for hours. Like maybe 20 minutes. 30 minutes max. Kind of before bed or when I wake up.***
>
> Chloe, 25

Few participants claim to post content now, and most claim to primarily see content posted by "creators" rather than their friends.

> ***[TikTok] It's just light-hearted fun. My algorithm, stupid memes and stuff like that. Whereas social media is, like, "My kid's first day of school". I'm like "OK!" [pulls a face].***
>
> Jenny, 32

One platform where claimed use is growing is LinkedIn. However, this was described as an activity they pursue for work, rather than pleasure, and primarily to keep abreast of potential job opportunities. The heaviest users are the same participants who expressed most concern about their job security, particularly in relation to AI.

> ***I try to get in and out of LinkedIn as quickly as possible, because LinkedIn just feels like politics. It feels like a lot of people talking about how well they're doing. And then people saying, "Oh, yeah, you're doing so well".***
>
> John, 39

> ***I've always been on LinkedIn, but I just think... I look on it to see how many people are looking at me, just in case. Our place is very volatile. You can go any day. There's no job security there.***
>
> Suki, 48

5.7 Gaming serves an important social function for some participants

Around a third of our sample are gamers. The five youngest men in the sample all own consoles, and a further two participants play games via apps on their phones (the latter number fluctuates a little from year to year). As such, we should be cautious about drawing broad conclusions from participant feedback in this area. Nevertheless there were some interesting insights this year.

The three youngest men in the sample all claimed to be gaming less this year, mainly because of their increasingly busy lives. But, gaming remains a valued way for them to stay in touch with their friends – a form of social glue for established friendship groups. Another participant is mother to an avid teenage gamer; she reported a similar change.

> ***I used to go on there with my friends. We're all 27 years old now, so don't have as much time to do it – which makes it less fun. So I haven't turned that [console] on in... three months, probably.***
>
> Tim, 27

> ***I think last year I was playing a lot more. Now, I still do come online just so I can talk to my friends from home... When we come online, we just listen to music whilst talking and playing and stuff.***
>
> Hazeem, 21

> ***[Son] is mainly playing FIFA, and it's more of a social activity with his friends now, which is really nice because you can hear them and they're all shouting and screaming and, you know, playing nicely.***
>
> Suki, 48

In some ways, therefore, communal gaming is a way for men to reach out to others, and there were two interesting examples this year of participants attempting to engage other family members in their gaming – albeit unsuccessfully!

In the first example, a participant bought an extra control pad for his PlayStation to get his partner involved.

> ***I bought a control pad, an extra one. And my idea was if I could get her [partner] to play with me, then she wouldn't mind when I play by myself. Instead what has been the case is I've used her controller, and she hasn't used it at all.***
>
> John, 39

In the second example a father, who has part-time custody of his daughter, thought that gaming might offer a good bonding opportunity.

> ***When she [daughter] comes around, she plays with the controller on the big screen. Fortnite. I'm rubbish at it. So when she went home to her Mum's, I played for about three months and got good at it, just so I could play together with her. Because at first she was like "Oh, what are you doing? What are you doing?" "I don't know what I'm doing". So I tried to practise, just for her, so I could play with her when she comes down. And I got good at it. And now she doesn't like it as much.***
>
> Dean, 36

In other cases gaming has been a more successful family bonding experience. A mum whose two twenty-something sons live at home, works with them on accruing credits for the game *Atlas Earth*.

> ***You have to do quests and arcade games and things. I don't do any of those. I do the rock, paper, scissors. Out of the whole world that was playing it... There's a lot of players on this... I got fourteenth.***
>
> Sheila 52

Another mother described her experience of learning French with her daughter using Duolingo. The gamification of learning seems to be an important part of the appeal to both of them.

> ***[Daughter} and I are really deep into Duolingo at the moment. You can do friends challenges, you can high-five each other and it's great because you're learning something as well, aren't you?***
>
> Denise, 48

Annex 1: Discussion guide

General media usage

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

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

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

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

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

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

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

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

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

Working/studying at home

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

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

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

Smart tech

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

How often and in what circumstances do you use voice-activation features such as Alexa or Google Assistant to control your devices? Is this more or less than last year?

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

Health and wellbeing

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

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

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

Do you have any specific concerns about the impact of the media you consume (and the time you spend doing so) on your physical or mental wellbeing? [PROBE FOR DETAILS – TRY TO TEASE OUT THE DIFFERENCE BETWEEN THE PHYSICAL EFFECTS OF SCREEN TIME (HEADACHES ETC.) AND THE MENTAL IMPACT OF (E.G.) SOCIAL MEDIA ENVY, PROLONGED EXPOSURE TO DISTRESSING NEWS CONTENT, ETC.]

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

[WHERE RELEVANT] Have you spoken to your children about your concerns?

Have you implemented any rules about their screen time?

Creative use of media

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

In the past year, have you created any content for a website, social media platform or YouTube – for example to promote your own business? [PROBE FOR DETAILS]

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

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

Financial issues

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

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

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

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

Gaming

How often do you play games (either on your computer, phone, tablet, TV set or on a games console)? [PROBE FOR DETAILS OF WHICH PLATFORMS ARE USED FOR GAMING]

Has this changed in the last year? If so, why?

AI

What does the phrase AI mean to you nowadays? What kind of functions or content does it make you think of?

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

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

Do you think AI is changing the nature of work (for you), and is this a good or bad thing?

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

When you're interacting with companies online, have you come across AI functions such as chatbots, virtual assistants or automated help systems? If so, have you used them?

[IF USED, PROBE FOR SECTOR – E.G. TELECOMS, INSURANCE, RETAIL]

Was it for a general query or a complaint? What was your experience of using it like? Did the AI function resolve your query/issue?

How do you feel about systems like this? Would you use it again in future?

Did you review the privacy policy/terms and conditions before using it?

[IF NOT USED] Why haven't you used them? What, if anything, would encourage you to use them in the future?

[WHERE RELEVANT] When you're in conversation with an AI system like a chatbot or ChatGPT, how does it make you feel? Does it ever feel like you're communicating with a real person? [PROBE FOR DETAILS]

In the past year, have you come across any examples of news stories (on social media or elsewhere), that you know or suspect were generated by AI? [PROBE FOR DETAILS]

Have you come across any examples of fake photos or videos that you know or suspected were generated by AI? [PROBE FOR DETAILS]

Where are you coming across AI-generated content?

Are you coming across more or less than this time last year?

What do you think of the amount of AI-generated content you're seeing?

Have you noticed the AI generated summaries search engines like Google sometimes display in search results, and retailers like Amazon sometimes show at the top of their product reviews?

If so, do you pay attention to these? Do you trust them? Are they useful? [PROBE: DOES THIS VARY DEPENDING ON THE CIRCUMSTANCES OR THE TYPE OF INFORMATION SOUGHT?]

Do you have any concerns about the environmental impact of your media and technology use (e.g. the amount of energy used to power AI systems)?

Does this impact your behaviour at all?

Television and other video content

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

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

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

On-demand (OTT) or streaming services

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

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

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

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

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

Do you pay a subscription to avoid the adverts on platforms like ITVX, the Channel 4 app or YouTube? Or a higher subscription to access an ad-free tier on platforms like Amazon Prime? Would you consider doing so?

YouTube

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

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

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

How do you watch YouTube (e.g. TV vs mobile device)? Do you watch different kinds of YouTube content depending on how you're watching?

PSB Content

How much do you watch the traditional 'public service' channels like BBC One to Four, ITV1, Channel Four and Five these days (or programmes from those channels on the iPlayer, ITVX etc.)? Do you watch them more or less than last year?

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

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

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

Do you (still) pay for a TV licence?

How do you feel about paying for the TV licence?

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

Radio and other audio content

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

Do you listen to (or watch) podcasts these days?

[THOSE WHO CONSUME PODCASTS] Which podcasts do you listen to or watch? How do you listen/watch, and where? [PROBE FOR DETAILS – E.G. DO THEY WATCH PODCASTS LIKE TV, OR ARE THEY SOMETHING DIFFERENT?]

Are you listening to (and/or watching) more or less than before?

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

News consumption

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

What would you consider to be your main sources of news nowadays? [PROMPT USING STIMULUS BOARD OF NEWS BRAND LOGOS?]

Are there any that you trust more or less?

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

Are you looking at any different news sources now, compared to a year ago?

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

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

Do you use different social media platforms for different types of stories? Do you look specifically for news on social media or do you just come across it in your feed?

Engagement with news

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

What would you consider to be "the mainstream media", and do you feel that your experiences and views are broadly reflected in the way in which news is covered by them? [PROBE FOR DETAILS]

Is this becoming more or less true as time goes by?

To what extent have your opinions been influenced by sources like [SOURCES OF NEWS CITED ABOVE], or do you think you look at those sources because they reflect the view of the world you already had?

Are there views that you used to hold that you no longer hold? What changed your mind?

Regulation

What do you know about the rules that are in place to regulate the UK news media? [PROBE FOR DETAILS]

Do you think that the same rules or different rules apply to different forms of news outlet (e.g. news bulletins on mainstream channels vs dedicated news channel vs website/app vs podcasters and YouTubers)? [PROBE FOR DETAILS]

Do you think that is appropriate?

Local news

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

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

Misinformation

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

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

Internet – Overview

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

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

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

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

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

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

eDemocracy

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

Applying for a driving licence, passport or other paperwork?

Submitting a tax return?

Looking up information about benefits or pensions?

Booking or conducting a doctor's or hospital appointment?

Looking up health information from the NHS?

Contacting your local council?

Looking up information about local services such as bin collections?

[IN EACH RELEVANT CASE…]

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

Social media

How has your use of social media (Facebook, Twitter/X, Instagram, TikTok, LinkedIn etc.) changed over the past year? Which are you using, which ones are you using more or less, and why? Are you using any new ones?

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

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

[FOR THOSE USING TIKTOK] How do you use TikTok and what do you watch on there?

Are there specific creators that you go back to regularly? [PROBE FOR DETAILS]

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

Have you come across any information that is not true on social media in the last year? [PROBE FOR DETAILS]

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

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

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

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

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

Have any recent events or news stories made you reconsider what you post or share on social media? [PROBE FOR DETAILS]

Messaging apps

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

Which are you using more (or less), and why?

Do you ever receive any unsolicited messages on these apps, or messages from people who you don't know? [PROBE FOR DETAILS]

Do you subscribe to any channels or communities on WhatsApp (these are a way of getting updates on specific interests, brands, content creators, etc. on WhatsApp, rather than group chats with family and friends)? [PROBE FOR DETAILS]

Trust and authority: spontaneous views

Thinking about the kind of media you consume, how important to you is trust?

Does it matter more for some kinds of content than others?

Is trust more or less important than it was, say, five years ago? Why?

Thinking about the different sources of information you consume across TV, radio, websites, apps and social media, which ones do you trust most? And which ones do you trust least? [PROBE FOR DETAILS]

Which sources do you trust more or less than, say, five years ago, and why?

Trust in different platforms for different types of information [PRO-FORMA A]

Please choose, from the following types of information source (broadcast TV/radio, podcasts, YouTube, specific websites or apps, social media), your "most trusted" and "least trusted" sources when it comes to each of the following type of information:

A: Hard news stories (e.g. national politics or conflict overseas)

B: Entertainment or sports news

C: Reviews or recommendations about a particular product or service that you might be interested in

D: Important information for your daily life (e.g. health or finance)

PROBE FOR REASONS AND DIFFERENCES IN RANKING FOR DIFFERENT TYPES OF INFORMATION. ANCHOR IN SPECIFIC EXAMPLES THAT ARE RELEVANT TO THEM (E.G. WHICH PODCASTER? WHICH WEBSITE?)

Characteristics of authority [PRO-FORMA B]

Thinking about why you trust some sources more than others, how important are each of the following characteristics?

They tend to be the first to publish the information

I tend to agree with a lot of what they say

They provide a lot more detail than other sources

The information they publish is reviewed and edited

They present the information in my kind of language

I have used them for a long time and have grown to trust them

They specialise in that particular subject

Other people I know have recommended them or also use them

I see their content shared a lot (e.g. on social media)

PROBE FOR REASONS. ARE ANY OF THESE REASONS BECOMING MORE OR LESS IMPORTANT AS TIME GOES BY?

Online Safety Act

Have you heard of the Online Safety Act? What do you know about it? [PROBE FOR DETAILS]

Are you aware of any changes in the past year in the rules surrounding what content people can and can't access and how they access it? [PROBE FOR DETAILS]

Ofcom has introduced new rules requiring websites which display adult content, or where there may be content unsuitable for children, to introduce age checks (e.g. having to upload some kind of ID that proves your age, credit card checks or facial recognition).

Were you aware of the new rules? If so, where did you hear about them? [PROBE FOR DETAILS]

What do you think of the rules?

Have you come across any examples of this in practice? [PROBE FOR DETAILS]

Has this impacted your own or [WHERE RELEVANT] your children's use of the internet at all? How do you feel about this?

Harmful/hateful and inappropriate online content

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

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

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

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

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

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

Privacy and Security

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

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

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

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

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

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

Have you received any "scam" emails, texts or phone calls in the past year, for example from people pretending to be your bank, Inland Revenue, a retailer or delivery company, trying to get you to pay them money, or get hold of personal information such as your bank details? [PROBE FOR DETAILS]

How convincing was the scam? Were you tricked?

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

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