



# Media Lives

Research Overview 2005-2010

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## Section 1

# Introduction to Media Lives

The Media Lives study was originally set up in early 2005 to provide a small-scale, detailed, qualitative complement to Ofcom's quantitative Media Literacy Tracker<sup>1</sup>. Whereas the Tracker seeks to quantify in a statistically robust way how many and what kind of people have different levels of access, awareness, skills and understanding, Media Lives aims to provide a human face to the data. It examines how digital media fits into people's lives, what issues and concerns they have regarding digital media, what motivates them to adopt new technology and learn new skills, and what the barriers are to them getting the most out of such technology.

Each participant is interviewed at length and in-home, which allows for a full exploration of the relevant issues and for demonstration/observation of media usage in situ. Six waves of research have now been conducted, in February 2005, and October 2006, 2007, 2008, 2009 and 2010<sup>2</sup>.

Certain subjects (many of which have been subject to great change over the six years of the study) have been covered consistently each year, including:

- Acquisition of media (e.g. web) skills, confidence in use of digital media, and adoption of new online activities (e.g. social networking);
- Use of mobile devices to consume content;
- Sources of knowledge and information about digital media, and methods of learning new skills;
- Trust in media providers across different media; and
- Concerns about privacy, security and safety.

However, the structure of the research has been sufficiently flexible to allow for more topical issues, or issues of particular interest to Ofcom at the time, to be explored each year. These include (in 2010) media stacking (the use of different media at the same time), the impact of EPG position on television channel choices, and attitudes to ISP 'traffic shaping'. While this is not a substitute for dedicated research into these areas, it has allowed Ofcom and its stakeholders to have some insight into subjects that might not otherwise enjoy the benefits of primary consumer research.

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<sup>1</sup> Please see [www.ofcom.org.uk/medialiteracyresearch](http://www.ofcom.org.uk/medialiteracyresearch) for latest results from this survey.

<sup>2</sup> The project throughout has been conducted by The Knowledge Agency.

The number of participants is relatively small – between 12 and 18 each year – but these people have been chosen carefully to reflect a broad cross section of the UK population in terms of age, location, ethnicity and social circumstances<sup>3</sup>. The unique methodology has allowed us to have extended discussions with these individuals, and to track their progress over time. Five of the fifteen participants in the 2010 wave have been part of the study since the start, and six more joined the study in 2006.

All interviews have been filmed, and the video plays a major role in the presentation of findings from the research. Each year's debrief is a 'living documentary' featuring extensive themed montages of participants talking about key issues – usually around 90 minutes of video in each presentation.

In addition, the key insights from each individual interview have been clipped and catalogued by theme, platform and participant each and every year of the study. The cumulative databank of nearly 1,500 video clips now represents a uniquely rich and detailed resource for exploring and communicating the evolution of consumer attitudes to digital media and media literacy issues in the UK.

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<sup>3</sup> Please see Annex 1 for more details about the current participants.

## Section 2

# Key insights from the study

Media Lives has charted the impact on real people of the revolution in digital media since 2005. Over that period, the fundamental motives and barriers to acquiring media literacy skills have largely remained constant.

Participants in the study have described themselves as being motivated to adopt new platforms and learn new skills variously by a desire to open new horizons in their lives, to keep up or conform with their peers, friends and family, to be in a position to be able to monitor their children's behaviour and ensure *their* safety within the digital space, to avoid feeling left out of a society in which access to the internet (for example) is increasingly expected, or just to indulge their own enthusiasm for new technology.

The major barriers to adopting new platforms and acquiring new skills have been an inherent fear of new technology on the part of some (particularly older) participants, a perceived lack of structured learning opportunities, fear of failure, a reliance on others (family and friends) to manage their digital media needs for them, and just sheer force of habit – they've always managed without these skills in the past, and don't necessarily see a compelling benefit to gaining them now.

Of course, although the broad motives and barriers to acquiring media literacy skills have remained consistent, the nature of the digital media technologies being used, the ways in which they are used, and the specific related media literacy issues have changed radically over the period of the study. Some of the most significant and far-reaching changes we have witnessed are the following:

### **The emergence and maturing of the social networking phenomenon**

In 2006 we saw an explosion in social use of the internet amongst our participants. This ranged from, at its most basic, the use of e-mails, through instant messaging to early adopters of MySpace, Bebo and Facebook.

By 2007, Facebook had become the dominant brand in this category, which it remains to this day. Ten of our fifteen most recent participants are active users. It has become an integral part of their social lives, and its easy availability on mobile devices has reinforced its status. However, after an initial period of experimentation, social networking activity among the sample has become more limited, and concentrated towards certain individuals. Nearly all of our Facebook users claim to have reduced the amount of time they devote to it significantly over the last two years, and the volume of social networking activity in the

sample is now strongly skewed to younger participants and, in particular, four of the eight women in the sample.

As the use of Facebook matures among our participants, the related privacy issues are becoming more subtle and complex. Users are now more aware and careful about what information they share, and generally more cautious about adding people as friends than they once were. Most commonly, their concerns are about the dangers of certain individuals getting to see sensitive information (e.g. employers, family members), rather than its exposure to the world at large. Increasingly, the Facebook-related dramas recounted by participants and/or their children are an extension of broader personal and/or social issues (e.g. relationship problems, bullying), rather than technology or platform-specific concerns such as internet privacy or viewing of unsuitable content.

### **The explosion in the use of mobile internet since the arrival of the iPhone and Android phones and 'apps'**

Attitudes to mobile phones as a media platform have changed substantially over the six years of Media Lives.

In 2005 the majority of participants viewed their mobile phone as solely, or predominantly, a communication tool. For a few, they were repositories of treasured personal content, but this was limited to photos and movies that stayed on the device itself. Within 18 months attitudes had changed somewhat with the upsurge in use of Bluetooth to share content between phones, and/or with PCs. There was also some usage of multimedia messaging and web browsing.

Since 2007, however, there has been a sharp increase in the use of internet on mobile phones. The high-profile launch of the iPhone, and the wide availability and increased affordability of other connected devices have fuelled both awareness and interest. The majority of our participants now have (or aspire to having) internet-enabled smartphones, and the emergence of user-friendly 'apps', which provide an intuitive user interface for specific online tasks has both made life simpler for existing mobile internet users, and encouraged some of those who are intimidated by PCs to be more open to idea of getting online.

For many, the mobile phone has now become a multi-dimensional social hub, used to keep in touch with their network of friends and family through a combination of calls, texts, instant messaging, email and Facebook. Mobile devices have started to replace PC usage for routine tasks within the home, as they are more portable, always connected, and do not require much time to boot-up. For most, however, the mobile phone continues to be used as an (increasingly sophisticated) communications tool, rather than as an entertainment device.

## Changes in 'linear' television viewing and use of radio sets

The study has coincided with the period in which the digital switchover has started to take place. All participants have been well-informed about, and well-prepared for switchover; their migration to digital television platforms has, however, had a significant impact on how they claim to watch television.

2007, for example, saw an increase in reported time-shift viewing, yet the almost complete redundancy of the traditional VCR. Hard disk recorders (and especially Sky+) are used very extensively where present (around half the households represented in the study have these), yet the availability of 'instant' repeats via +1 and other complementary digital channels has also had a major impact. More recently, the emergence of the iPlayer and other on-demand services has led to significant claimed changes in viewing patterns (especially in Virgin households, where an extensive on-demand service is easily available on the main household TV set, rather than a PC/laptop) from linear to on-demand viewing, particularly when it comes to 'must-see TV'.

Amongst our sample, an 'appointment to view' is now most likely to be made with a favourite recorded (or on-demand) show (except in cases of highly time-sensitive content, such as major sporting events). Live viewing for some participants has taken on the role of a time-filler, with relatively low levels of attention and engagement. Within this, viewing choices gravitate towards a favourite channel (often thematic, e.g. Dave) rather than specific programmes. The increased channel choice available as a result of digital switchover means that these viewing choices are becoming increasingly eclectic across the sample.

Another by-product of the switchover to digital television has been the availability of radio on different devices within the household. We have seen a steady migration of in-home listening from radio to TV sets, such that several of our participants no longer have a traditional radio set in the household at all.

## The increased importance of 'environmental' news consumption as an alternative and/or complement to more traditional news sources

Over the course of the study, participants have begun to use a wider and wider range of sources to access news content at different times of day.

The ubiquity of major headline news in their daily routine – including hourly radio bulletins, video screens at work and in public places, news feeds on their ISP home pages, and even the presence of newspapers at supermarket check-outs – means that most are much less likely to access traditional TV news bulletins than they once were. This 'incidental' or 'environmental' access to news means that most feel well-informed most of the time about

what is of most interest to them, with the option to dig deeper on-demand via news websites or 24-hour news channels.

### **The emergence of a 'self-help' media literacy culture**

Whereas in 2005 many participants expressed their desire for government, regulators or other authorities to play an active role in, for example, regulating the content available on the internet or providing more courses to help people to acquire IT skills, we have subsequently seen the emergence of a 'self-help' culture to fill the perceived vacuum.

Parents are playing a pro-active role in regulating their children's online activities, and informal support networks are spreading media literacy skills. Those with most expertise share their knowledge with their family and friends. Often these 'family technicians' (as one participant called herself) are younger than those they are helping – sometimes much younger. As skills and knowledge are acquired, they are passed on down the food chain.

Although some concerns do remain about online safety and security, especially in relation to young people, most participants have grown steadily more confident that they can, for example, shop or bank safely online, so long as they take the right precautions. Positive experiences have built trust and confidence, and word-of-mouth from fellow users has also played an important role in reassuring them about trying new things.

On the whole, these informal support networks seem to be working well for cultivating basic 'access' skills, such as how to perform specific tasks safely online. However, there is no evidence that such networks are promoting critical awareness of media content. And the more advanced and creative uses of digital media (such as blogging, website creation, photo and video editing) still appear to be the preserve of a motivated minority.

Lastly, as well as addressing its core objectives, the Media Lives study has also proven to be a sensitive barometer to broader issues of interest to Ofcom.

Due to its open-ended and in-depth structure, within which the agenda of each interview is in part dictated by the participants themselves, the study has highlighted emerging issues such as:

- Confusion about mobile phone pricing structures (especially for data usage) leading to young people running up large bills despite being on monthly contracts;
- Concerns about privacy and security issues as evidenced by examples of 'social drama' played out on social networking sites;

- The impact of home networks and mobile devices on the level of control parents are able to exercise over children's online activity; and
- A decline in trust in major broadcasters in the light of (e.g.) coverage of the Iraq war, Crowngate, the perceived 'hying up' of the financial and fuel crises, and phone-voting scandals.

## Section 3

# Case studies

Although there is an ever-evolving range of digital media technologies available, and ever more applications to which to put them, it has been comparatively rare for the availability of a new technology in itself to persuade participants in the study to change their behaviour. Most often it is changes in their own personal circumstances that serve as the catalyst to the acquisition of new hardware and/or the development of new skills. Progress in the development of digital technology and the life journeys of individual participants are parallel tracks through time. Where these two tracks cross, the most significant changes happen in participants' use of digital media, and media literacy issues are most vividly highlighted.

For example, changing domestic circumstances mean that participants have changed access to media platforms, or are confronted by new media literacy challenges. For one of our youngest participants, leaving home for university meant a loss in access to a full range of television services, but easier and more unfettered access to broadband internet. Another participant who got divorced two years into the study suddenly became responsible for sorting out both her own media technology, and that of her children; this forced her to confront her own fears of the internet. Another technophobe, who lost his job, has had to learn the skills necessary to apply for jobs online.

People also grow up and into or out of certain activities. As some participants have matured, they have shown an increasing interest in speech radio, for example; and participants who as students had plenty of time on their hands to play online games, or use social networking sites for hours on end, suddenly find that they need to be much more focused in their online activities once they join the world of work.

There follows a selection of short case studies introducing some of the participants from the study, and illustrating the impact of lifestage events upon digital media adoption and usage.

## Betty<sup>4</sup>

### *The conscientious objector*

Betty is a 66-year-old retired office worker from Edinburgh. She has been a participant in the Media Lives study since 2008.

Betty is by no means a technophobe. She is an avid digital photographer, who transfers images via SD card to her digital photo frame with confidence. She even has experience of working with a PC in the office environment over a period of many years. However she has chosen not to have a PC or an Internet connection at home. She doesn't really see the point of having the Internet, and is still somewhat intimidated by the technology in spite of her office experience. Moreover she is resentful of what she views as an expectation on the part of companies and government services for individuals to be able to access websites, send and receive e-mails. She feels in real danger of becoming digitally disenfranchised.

In 2009 Betty's husband, for whom she had been a full-time carer, died. A by-product of this sad event was that Betty suddenly has a lot more free time on her hands, and this has provoked her to reassess the role of the Internet in her life.

She has been dabbling with online shopping at a friend's house (an example of an informal support network at work). However she is still sceptical about having a PC at home. She has, however, shown a real interest in the new generation of mobile devices (such as the iPhone and iPad) which allow users to access interesting information and content online using apps, and which use a touch-based interface instead of a mouse. It will be fascinating to see whether or not Betty has followed up on this interest in 2011.

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<sup>4</sup> Names have been changed in order to protect participants' anonymity.

## **Karen**

### *The digital mum*

Karen is a 34 year old full-time charity worker (currently on maternity leave). She is married, and lives with her husband and new-born daughter in a house in Cardiff. She has participated in Media Lives since 2006.

Karen has a relatively sophisticated knowledge of digital media. She used to work for a telecoms company, and has access through Virgin Media to digital television, home phone and broadband. She was one of the first participants in the study to use the internet on her mobile phone, and is a classic 'family technician' providing help on programming videos, getting online, using mobiles and so on to her extended family group.

Since becoming a mum, Karen's life has (inevitably) changed dramatically. Digital media continues to play an important role in her life, though this is now much changed. Whereas mobile technology was previously important to her busy, 'out and about' lifestyle, digital technology in the home was taking precedence at the time of her most recent interview (October 2010).

Social networking is now her 'lifeline' to her previously active social life, as well as a great means of keeping family and friends abreast of the latest developments in her young daughter's life; on-demand and time-shifted viewing is the only way to make sure that she can watch her favourite programmes when she may have to change a nappy at any point; and her Nintendo Wii, which was once brought out for party games, is now used with a Wii-Fit board in an attempt to shed pounds gained during the pregnancy.

In 2011 it will be fascinating to see how (assuming she returns to work) the two halves of Karen's double life are reconciled, and what role digital media plays in facilitating this.

## Clive

### *The assured media conqueror*

Clive is 28 years old, and lives in a shared house in Chelmsford with one house-mate. He works as a banker in The City, and has been part of the Media Lives study since 2005.

Much has changed for Clive over the six years of the study. When we first met him, he was a student living in halls. In year two, he was living back home with his parents, having just graduated and taken his first job in London. Now he has his own (shared) house.

Over that time, he has gone from being a voracious consumer of new media content and early adopter of new technologies – though living on a student budget – to being a cash-rich, time-poor young professional. His home is full of the latest technology – flat-screen TV, DAB radio, Playstation 3, etc. – but Clive spends limited time using it.

His internet use in particular has become more serious and focussed as the study has evolved. As a student, he was happy “wasting time playing mindless games”, then was an early and active adopter of Facebook with a list of over 500 friends. Now he considers himself a “weekend Facebook user” only, and has become less adventurous in his use of other online services (music buying, shopping for clothes, etc.), tending to gravitate towards established brands for convenience and confidence.

Clive is intellectually engaged by media literacy issues, and has well-thought out views even on issues that don't directly affect him. In 2006 he spoke eloquently of the apparent agenda of much media coverage, driven by political and business interests. He is quite particular about looking at a range of sources, and will go to some effort to find independent voices either in print or online.

In 2011 it will be fascinating to get his perspective on some of the subjects dominating the media this year – including Libya, the phone-hacking scandal and the media's continued coverage of his own profession, banking.

## Irene

### *The adventurous explorer*

Irene is a 75-year-old retired health worker. She lives with her husband and son in a small Buckinghamshire village. She has been part of the Media Lives study since 2005.

Irene has access to digital television via Freeview, digital radio through DAB and the internet via broadband. She has embraced these new technologies to varying degrees.

The internet plays a small, but important part in her day-to-day life, as her rural location means that her nearest bank branch, for example, is some distance away. Broadband has made the whole process of going online simpler and more enjoyable for her.

Irene has made great strides in her internet use since the start of Media Lives. She can now use e-mail, visit sites and do online shopping and banking with a reasonable degree of confidence. Good experiences have bred further confidence, and having a real motive to learn (e.g. trying to buy a particular brand of wool from Spain) has inspired her to persist in spite of encountering problems along the way.

Irene has made significant progress every year, but is still not a complete or confident 'digital participant'. She has an appetite to learn, though limited access to any kind of support network (in part a function of her rural location).

It will be interesting to see what further steps towards digital participation Irene has made in 2011.

## **Katie**

### *The digital innocent*

Katie is a 23-year-old student from Belfast, currently studying in England. She has been part of the Media Lives study since 2006.

Moving away from home, and changing University accommodation each year has meant radical changes year-on-year in terms of what media Katie has access to. While living in halls, for example, she had broadband access in her room, but no television or radio. Almost all of her media consumption therefore was channeled through her laptop and/or her mobile phone.

This has exposed Katie to many of the 'grey' areas of content access and issues of online security and safety. Without thinking too much about the consequences, she has streamed and downloaded lots of music and video via illegal P2P sites. Her laptop was infected by viruses, causing her major problems. She also racked up a mobile phone bill of £186 in her first month at college, and had to take on an overdraft to pay for it. Although she now makes some effort to limit her calls, this is sometimes difficult as she is confused about the nature of the charging mechanisms on her contract, especially for internet access (this has been a recurring theme across many young people in the sample, and those with teenage children).

Social networking has also played an important, and not wholly constructive, role in Katie's life over the course of the study. When we first spoke to her in 2006, she and her school-friends were "addicted" to Bebo. She now blames this for her "disappointing" A level grades. Nevertheless, as a first year student she spent long periods on Facebook, which she used to network both with friends from home, and fellow students on her course (many of whom were only a matter of metres away!). She subsequently failed her first year exams.

Katie now feels that she is older and wiser, and sees in her younger cousins some of her own former naivety. It will be interesting to see whether Katie really has become more careful, or whether she will have encountered new hazards as she is exposed to new technologies and services.

## Tony

### *The unwitting convert*

Tony is a 37 year old engineer, who lives with his wife and two young children in Derbyshire. He joined the Media Lives study as one of the original participants in 2005.

Tony has made a radical transition over the course of the study. He started as a conservative and selective user of digital media to pursue his interests (e.g. watching interactive football on Sky), but was highly dismissive of the relevance to him of internet or mobile technology in particular. Personal circumstances have forced him to reassess his views – a change of jobs in 2007 forced him to get to grips with using a PC for the first time, and another in 2010 has made him more reliant for work purposes on mobile internet.

In parallel, of course, technology has moved on, and the emergence of the iPhone has delighted and inspired Tony to completely change his views on such devices. He has now become an iPhone and mobile internet evangelist, steadily gaining confidence at the same time in his broader use of digital technology.

The recurring theme through all of Tony's interviews is the importance of his family to him. Even in 2005 he was using his mobile phone to take photos and video footage of his children, and it's great for him to have these treasured memories close at hand. As his children begin to grow up, Tony has realised that he will need to "up his game" in terms of his internet literacy in particular, so that he can exercise some degree of supervision and/or control over their behaviour. In 2011 it will be interesting to see if he has been able to keep pace with them.

## Annex 1

# Participants

Participants were chosen to reflect a broad cross-section of the UK population in terms of age, location, ethnicity and social circumstances.

The table below shows the range of people interviewed in 2010, and the number of years they have taken part in the study.

<b>Sex</b>	<b>Age</b>	<b>Job</b>	<b>Location</b>	<b>Years in study</b>
F	19	Student	Edinburgh	3
M	22	Lifeguard	London	5
F	23	Student	Plymouth	5
M	27	IT worker	Coventry	4
M	28	Banker	Chelmsford	6
M	32	IT manager	Cardiff	5
F	34	Charity worker	Cardiff	5
M	37	Engineer	Derby	6
F	45	Carer	Coventry	6
F	51	Caterer	London	5
M	51	Unemployed	Belfast	3
M	57	Security adviser	London	5
F	66	Retired	Edinburgh	3
F	75	Retired	Bucks	6
F	78	Retired	Coventry	6