Project 2 Quantitative – *Safety measures on vide-sharing platforms survey*
Chart pack

Produced by: Yonder Consulting

Fieldwork: 26th to 30th October 2020

Definitions and Clarifications

Video Sharing Platforms: This research explored a range of websites and apps used by people in the UK to watch and share videos online. Although the term 'video sharing platforms' (VSPs) is used, this research does not seek to identify which services will fall into Ofcom's regulatory remit, nor to pre-determine whether any particular service would be classed as a VSP under the regulatory definition. It should also be noted that the platforms included in this research operate at different scales. This should be taken into consideration when comparing results from users of smaller VSPs against those from users of larger platforms.

Site and App Content: This research explored a range of sites and apps which have video sharing functionalities. Many of these platforms also contain a mix of video and other types of content and allow users to view and participate in a range of ways, of which video sharing is one element.

Sources of Evidence: Evidence in this research is self-reported by respondents who have shared their experiences, recollections and feelings about VSP usage and potential online harms experienced on VSPs. All respondents participated voluntarily and were free to withdraw their participation at any point during the research process. As such, the evidence is limited by respondents' freedom to decide whether to participate, their ability to recall events, accuracy of that recall and which experiences they chose to disclose.

Methodology

Sample
- 1,002 people aged 13-84 in the UK
- Quotas set on gender, age, socio-economic group and region

Data collection
- Online survey interviews conducted amongst the Ofcom VSP Panel
- Conducted by Yonder
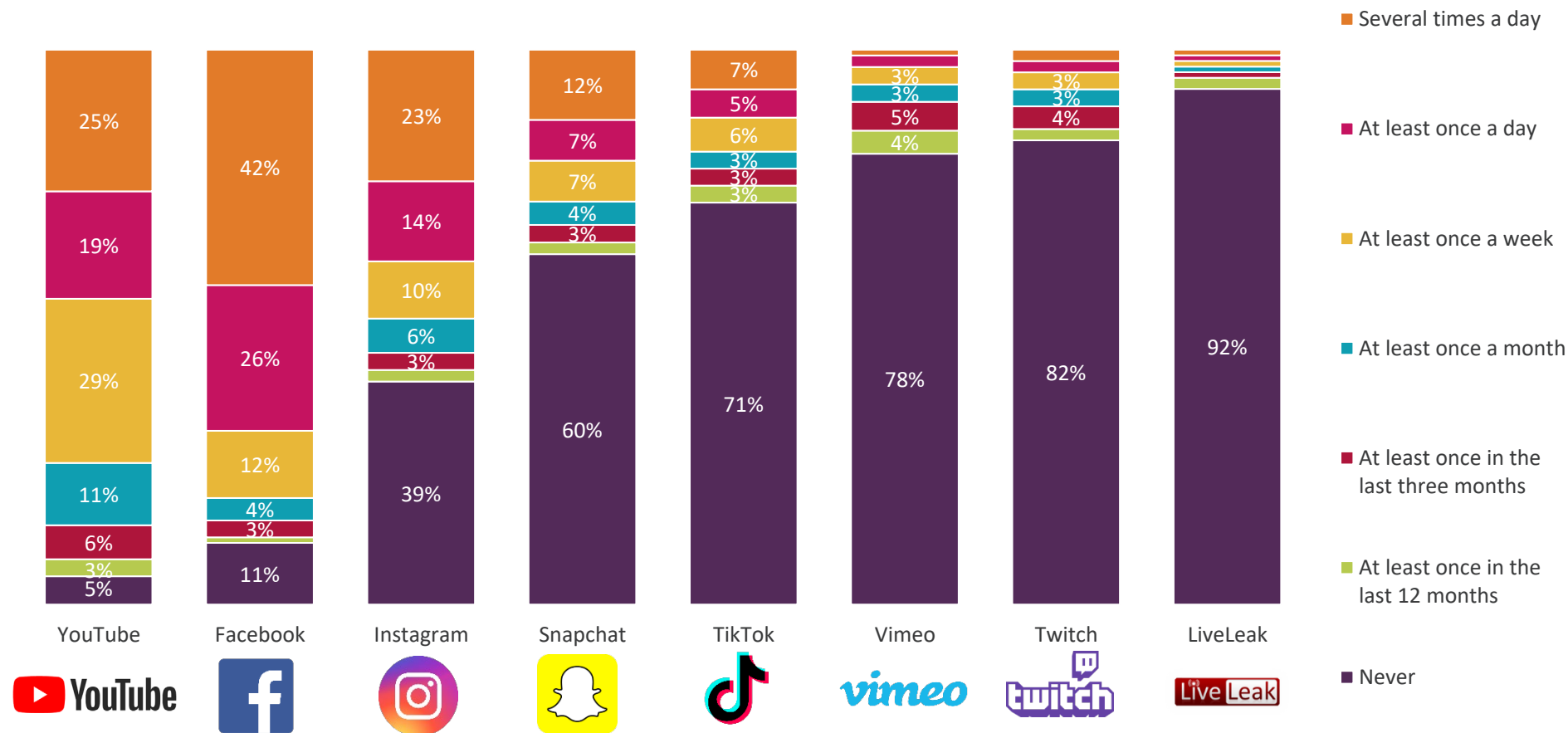- Fieldwork from 26th – 30th October 2020

Data reporting
- Weighted to be representative of those who go online in the UK
- Data available in data tables
- Significance testing applied at the 95% confidence level

Section 1
Usage of and attitudes towards VSPs

YouTube and Facebook are the most frequently used platforms, with two-in-five using Facebook several times a day
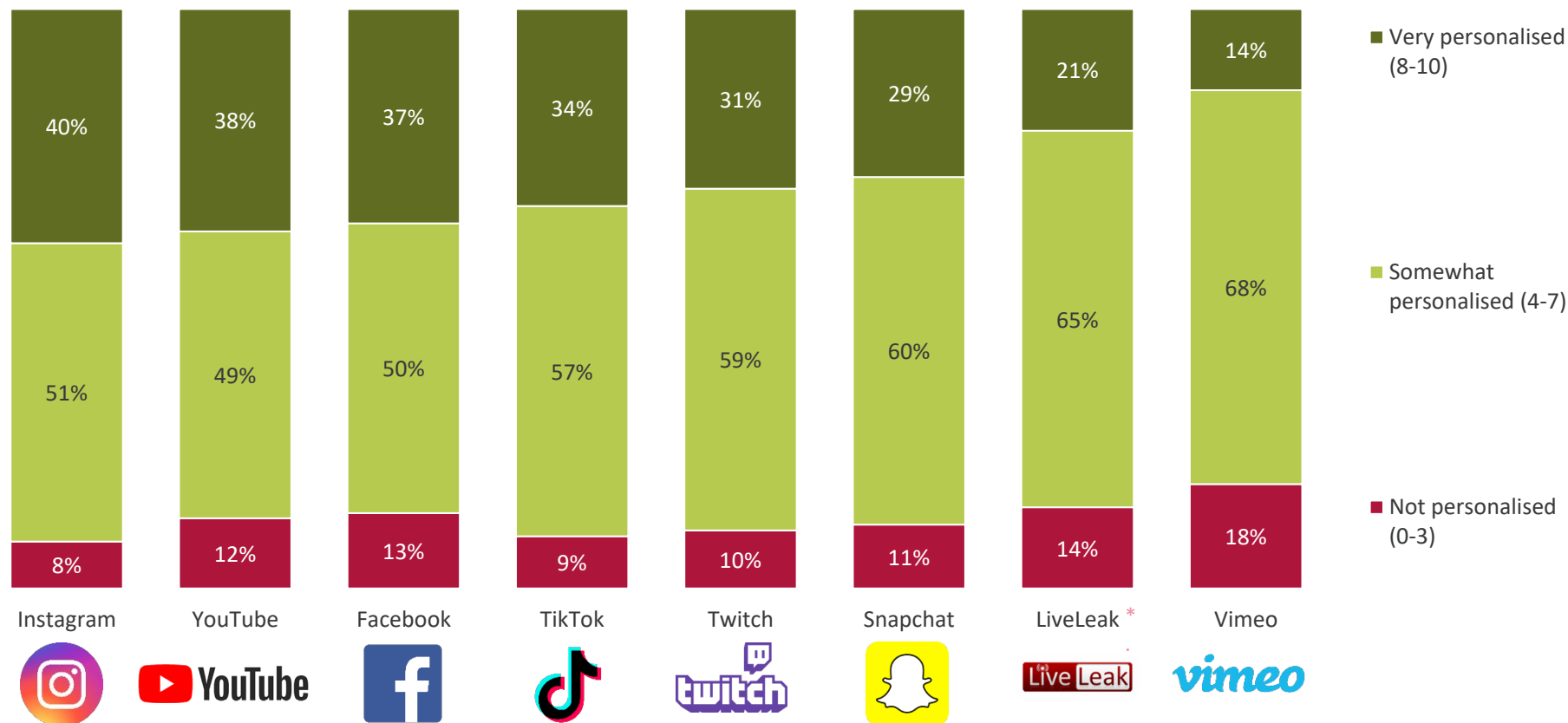
Use of services by frequency:

Legend:
- Several times a day
- At least once a day
- At least once a week
- At least once a month
- At least once in the last three months
- At least once in the last 12 months
- Never

YouTube: 25%, 19%, 29%, 11%, 6%, 3%, 5%
Facebook: 42%, 26%, 12%, 4%, 3%, 11%
Instagram: 23%, 14%, 10%, 6%, 3%, 39%
Snapchat: 12%, 7%, 7%, 4%, 3%, 60%
TikTok: 7%, 5%, 6%, 3%, 3%, 3%, 71%
Vimeo: 3%, 3%, 5%, 4%, 78%
Twitch: 3%, 3%, 4%, 82%
LiveLeak: 92%

The most frequently used VSPs are also perceived to show the highest level of personalised content to users

Extent of personalisation by VSP:

	Instagram	YouTube	Facebook	TikTok	Twitch	Snapchat	LiveLeak *	Vimeo
Very personalised (8-10)	40%	38%	37%	34%	31%	29%	21%	14%
Somewhat personalised (4-7)	51%	49%	50%	57%	59%	60%	65%	68%
Not personalised (0-3)	8%	12%	13%	9%	10%	11%	14%	18%

Users of LiveLeak, TikTok, and Facebook were the most likely to think they would come across harmful content when using the platform

Likelihood to encounter harm in the next 3 months, by VSP:
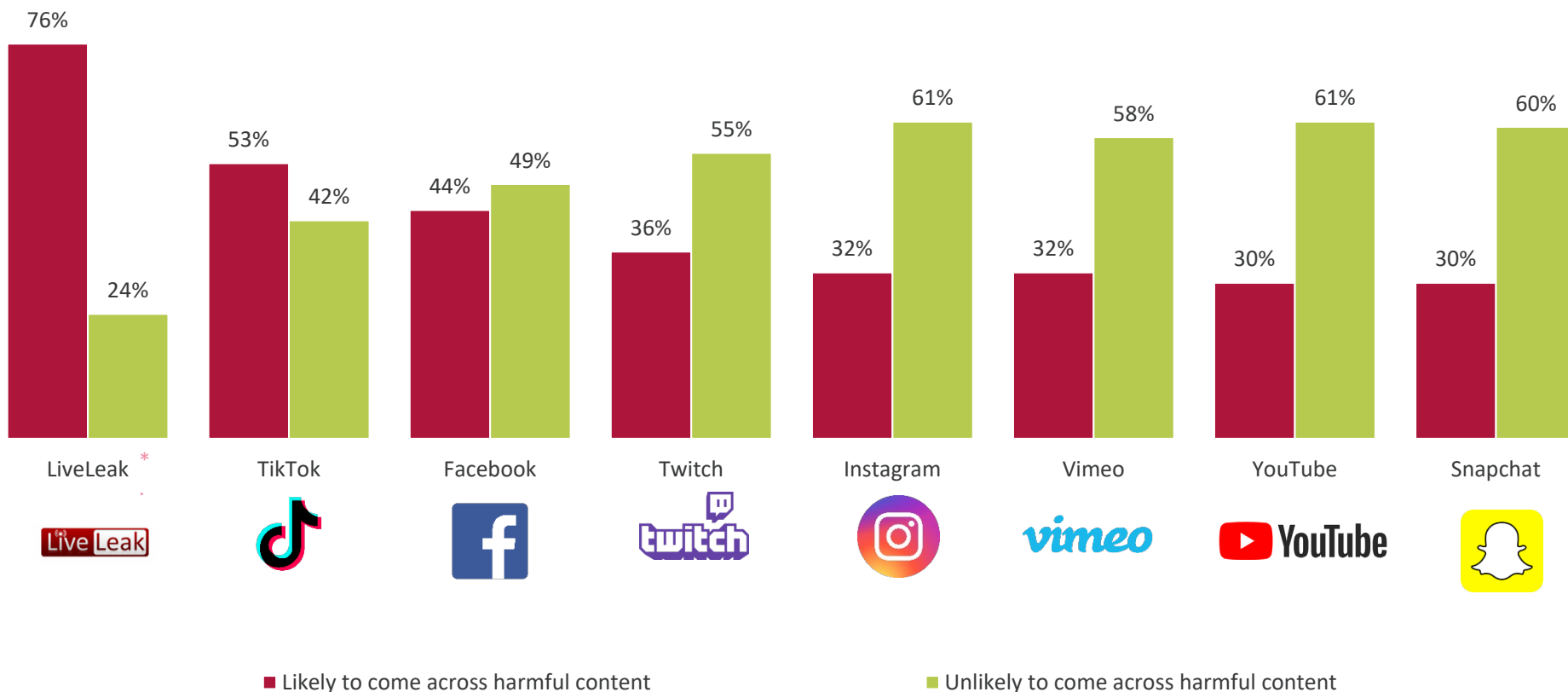
VSP	Likely to come across harmful content	Unlikely to come across harmful content
LiveLeak *	76%	24%
TikTok	53%	42%
Facebook	44%	49%
Twitch	36%	55%
Instagram	32%	61%
Vimeo	32%	58%
YouTube	30%	61%
Snapchat	30%	60%

■ Likely to come across harmful content   ■ Unlikely to come across harmful content

Users of these three VSPs were also the most likely to feel unprotected by the platform, however, overall there's a high level of uncertainty about the level of protection on VSPs

How protected users feel by VSP:
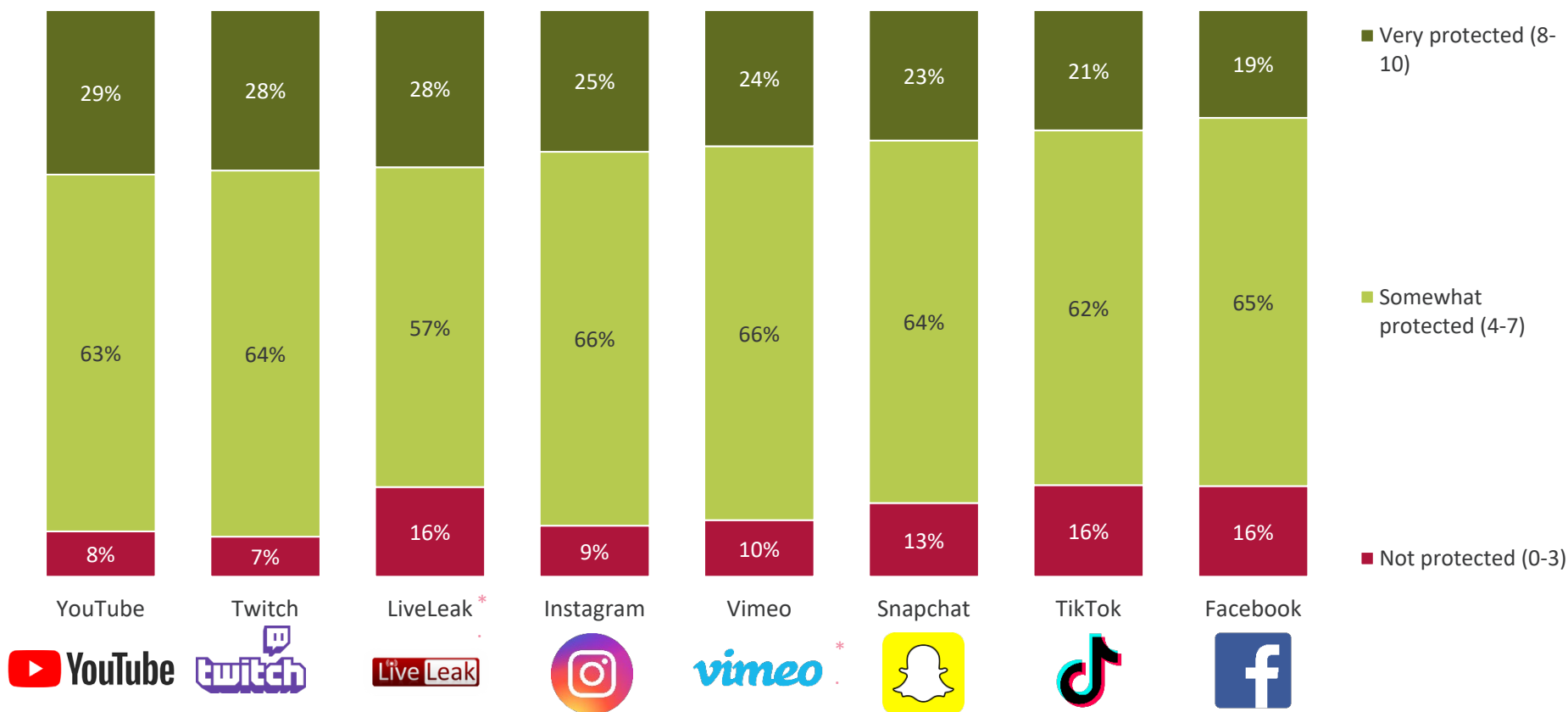
	YouTube	Twitch	LiveLeak*	Instagram	Vimeo	Snapchat	TikTok	Facebook
Very protected (8-10)	29%	28%	28%	25%	24%	23%	21%	19%
Somewhat protected (4-7)	63%	64%	57%	66%	66%	64%	62%	65%
Not protected (0-3)	8%	7%	16%	9%	10%	13%	16%	16%

Users feel the site or app itself should take the most responsibility for protecting users, while children should take the least

How responsible each of these groups are for protecting users:
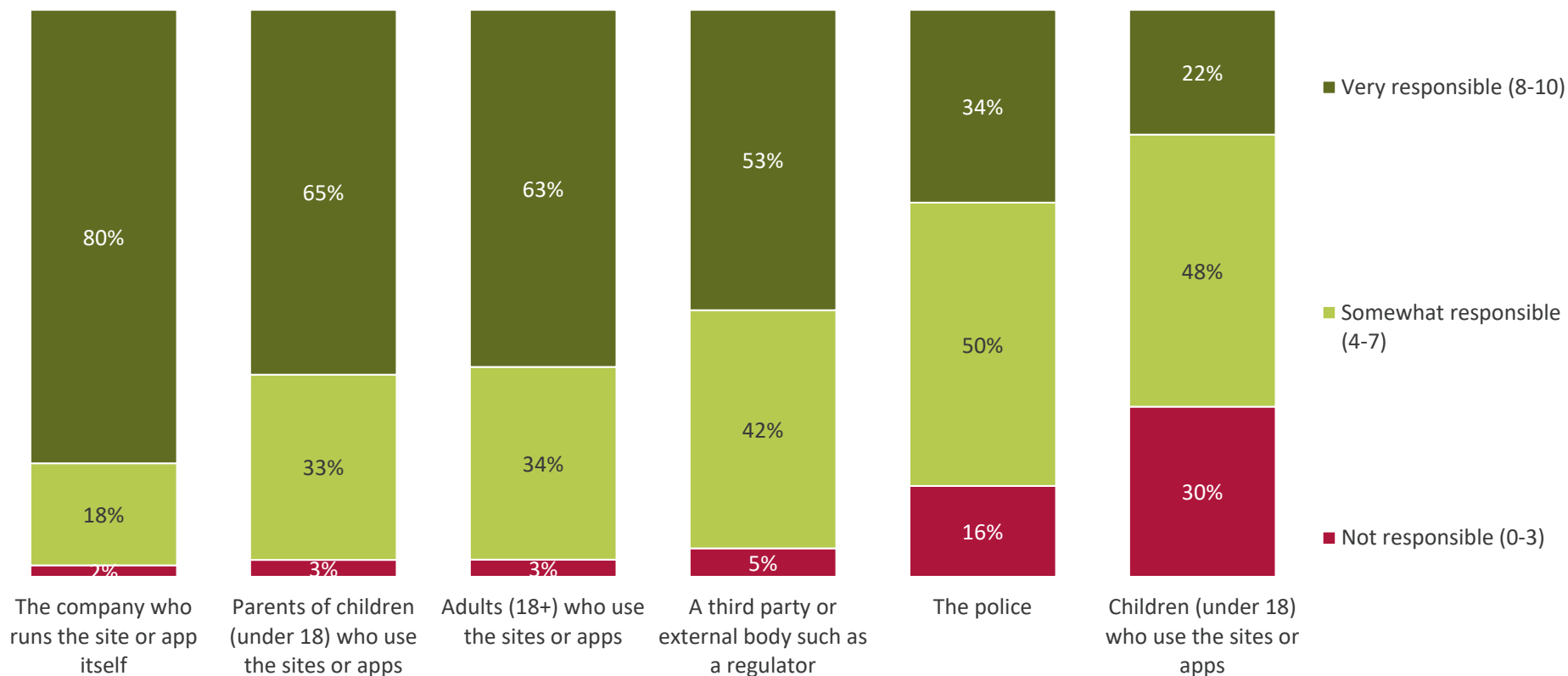
Legend:
- Very responsible (8-10)
- Somewhat responsible (4-7)
- Not responsible (0-3)

Group	Very responsible (8-10)	Somewhat responsible (4-7)	Not responsible (0-3)
The company who runs the site or app itself	80%	18%	2%
Parents of children (under 18) who use the sites or apps	65%	33%	3%
Adults (18+) who use the sites or apps	63%	34%	3%
A third party or external body such as a regulator	53%	42%	5%
The police	34%	50%	16%
Children (under 18) who use the sites or apps	22%	48%	30%

Section 2
Awareness of safety measures

The majority of those surveyed were unaware of the safety measures in place on VSPs, particularly women and older respondents aged 45+

Awareness of safety measures by core demographics - part 1
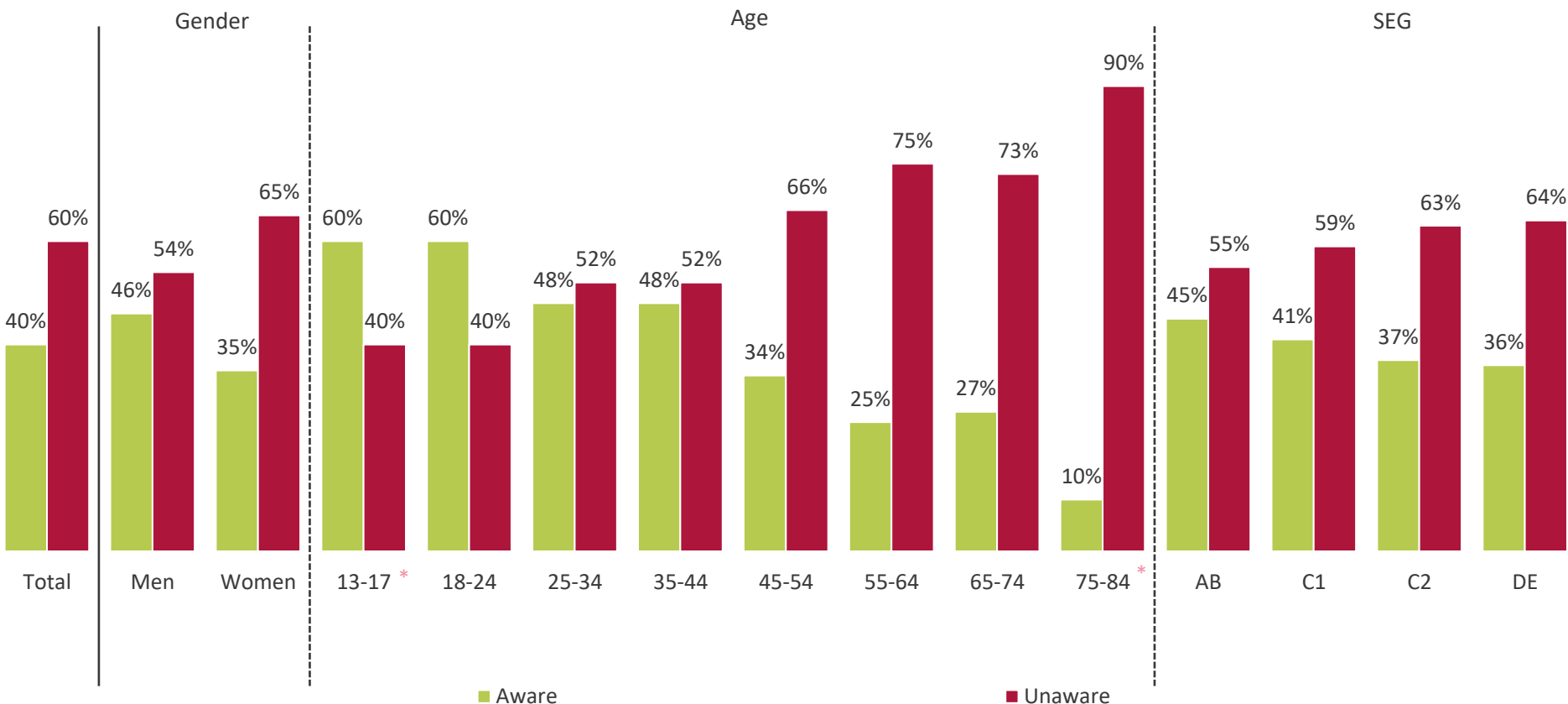
Gender

	Aware	Unaware
Total	40%	60%
Men	46%	54%
Women	35%	65%

Age

	Aware	Unaware
13-17 *	60%	40%
18-24	60%	40%
25-34	48%	52%
35-44	48%	52%
45-54	34%	66%
55-64	25%	75%
65-74	27%	73%
75-84 *	10%	90%

SEG

	Aware	Unaware
AB	45%	55%
C1	41%	59%
C2	37%	63%
DE	36%	64%

■ Aware   ■ Unaware

Users from minority ethnic groups are more aware of the safety measures than white ethnicities

Awareness of safety measures by core demographics - part 2
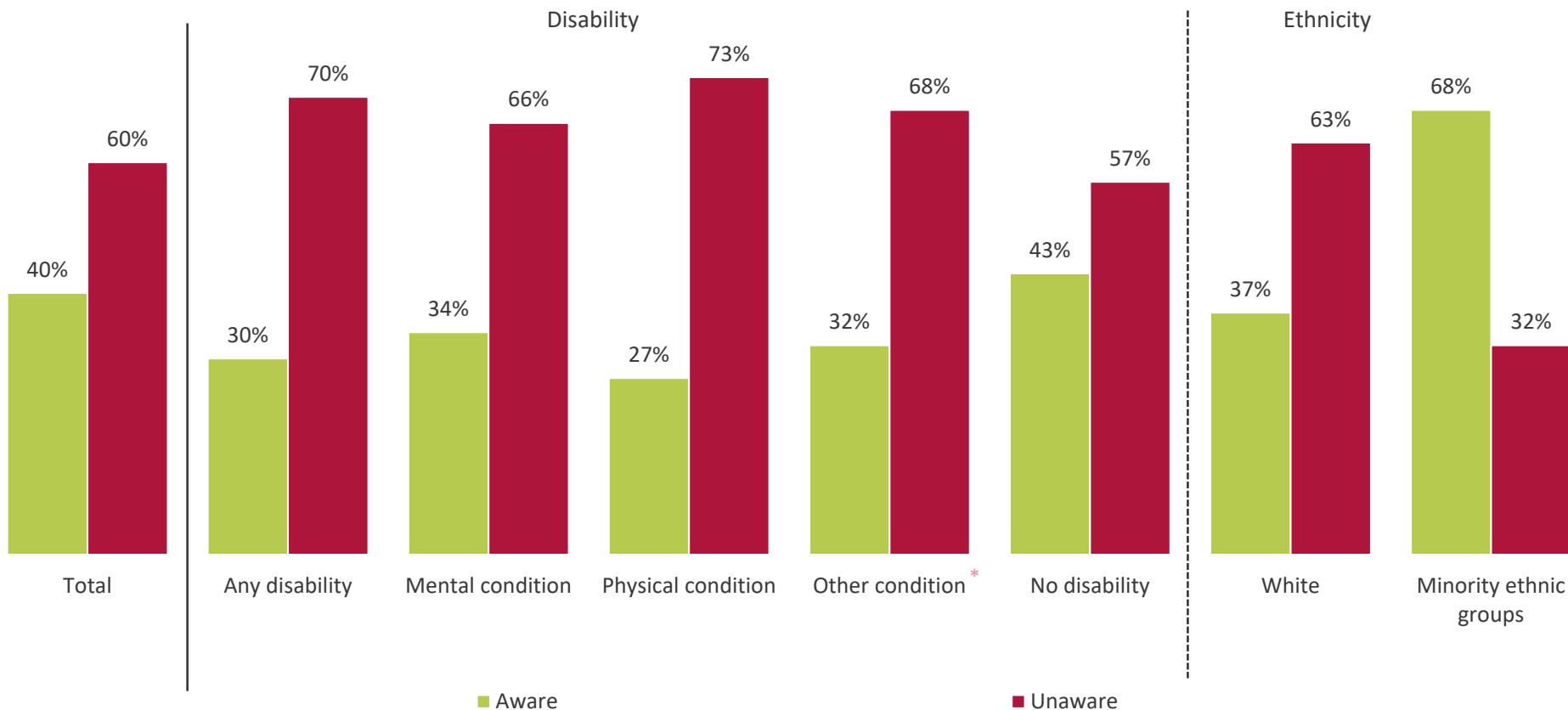
Disability

	Aware	Unaware
Total	40%	60%
Any disability	30%	70%
Mental condition	34%	66%
Physical condition	27%	73%
Other condition*	32%	68%
No disability	43%	57%

Ethnicity

	Aware	Unaware
White	37%	63%
Minority ethnic groups	68%	32%

■ Aware ■ Unaware

12

Users were most likely to reference broad rules about harmful content and the tools VSPs have in place to detect the material

Awareness of safety measures – open answers

More prominent themes

1.

2.

3.

4.

5.

6.

Less prominent themes

1. Rules about harmful content and tools to detect it

"They have specific rules about nudity, inappropriate language etc. They also have automatic detection and review processes"

"They have moderators, algorithms, and complaints procedures"

2. Tools to filter harmful content or block the user who posts it

"They will suspend your account if they see any activity that goes against their rules"

"They remove posts which are offensive in regards to race, religion, etc."

3. Reporting buttons and mechanisms

"You can report offensive things for them to investigate"

"You can report any content you deem to be inappropriate"

"There's usually a report button"

4. Not aware of any safety measures

"Nothing specific"

"I'm not aware of any rules or safety measures"

"I know there are rules but I can't recall any"

5. Age restrictions

"There's a minimum age to register"

"They have age verification and ID checks"

"They have age restrictions, but it's up to the parents to enforce"

6. Warnings on harmful content

"There are warnings e.g. YouTube will tell me if a video is only appropriate for over 18s"

"They have disclaimers you have to click to view material"

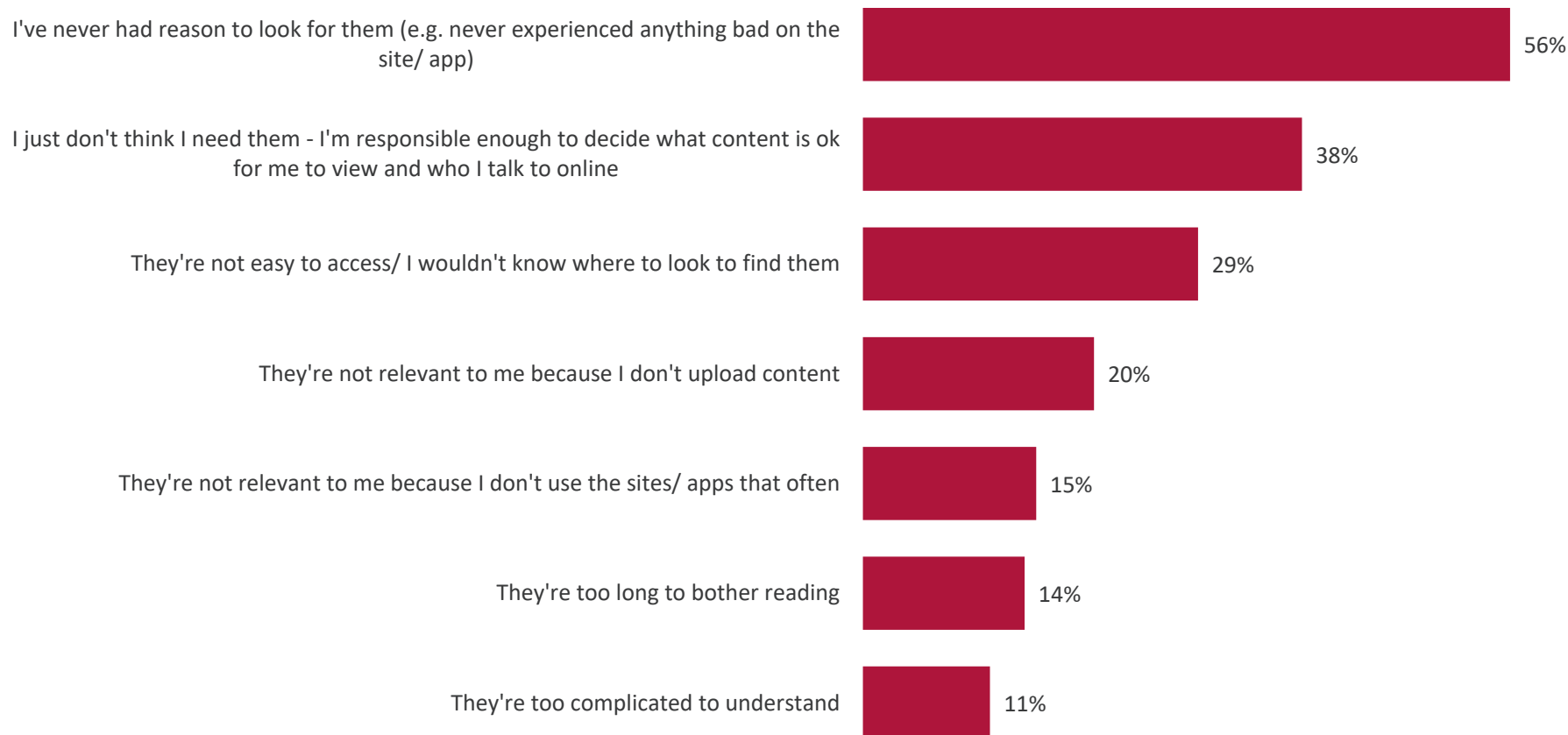*"Graphic images have advisory warnings"*

Source: VSP Appropriate Measures Survey

Q7. What sort of rules or safety measures are you aware of these sites or apps having in place? Please provide as much detail as you can recall.

Base: all, n=1,002

More than half of those who are unaware of the safety measures in place claim this is because they've never had a reason to look for them

Reasons for lack of safety measure awareness:

Reason	%
I've never had reason to look for them (e.g. never experienced anything bad on the site/ app)	56%
I just don't think I need them - I'm responsible enough to decide what content is ok for me to view and who I talk to online	38%
They're not easy to access/ I wouldn't know where to look to find them	29%
They're not relevant to me because I don't upload content	20%
They're not relevant to me because I don't use the sites/ apps that often	15%
They're too long to bother reading	14%
They're too complicated to understand	11%

Respondents were most likely to recall seeing safety measures on the most frequently used VSPs: Facebook, Instagram and YouTube

Recall of seeing safety measures in the last 3 months, by VSP:
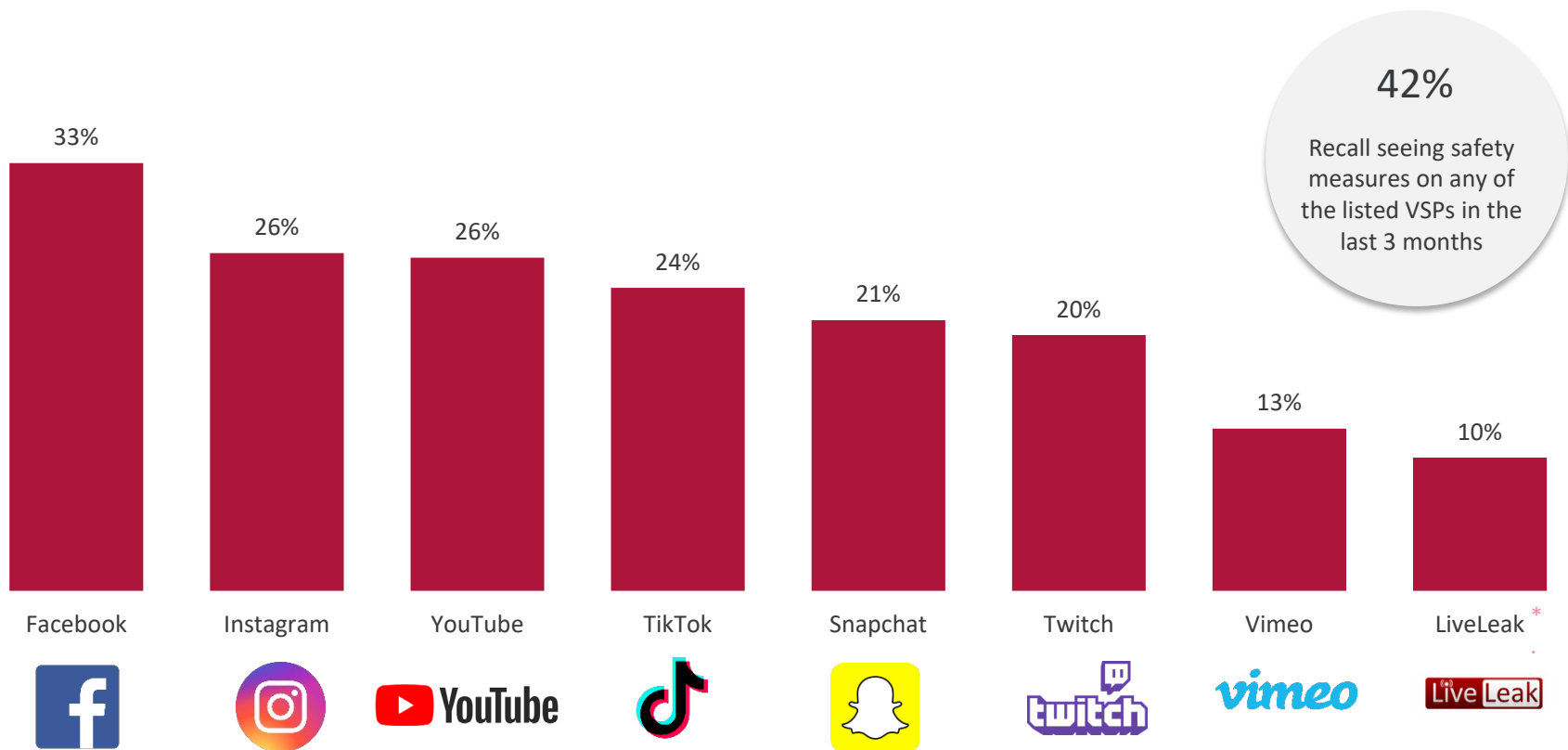
42%

Recall seeing safety measures on any of the listed VSPs in the last 3 months

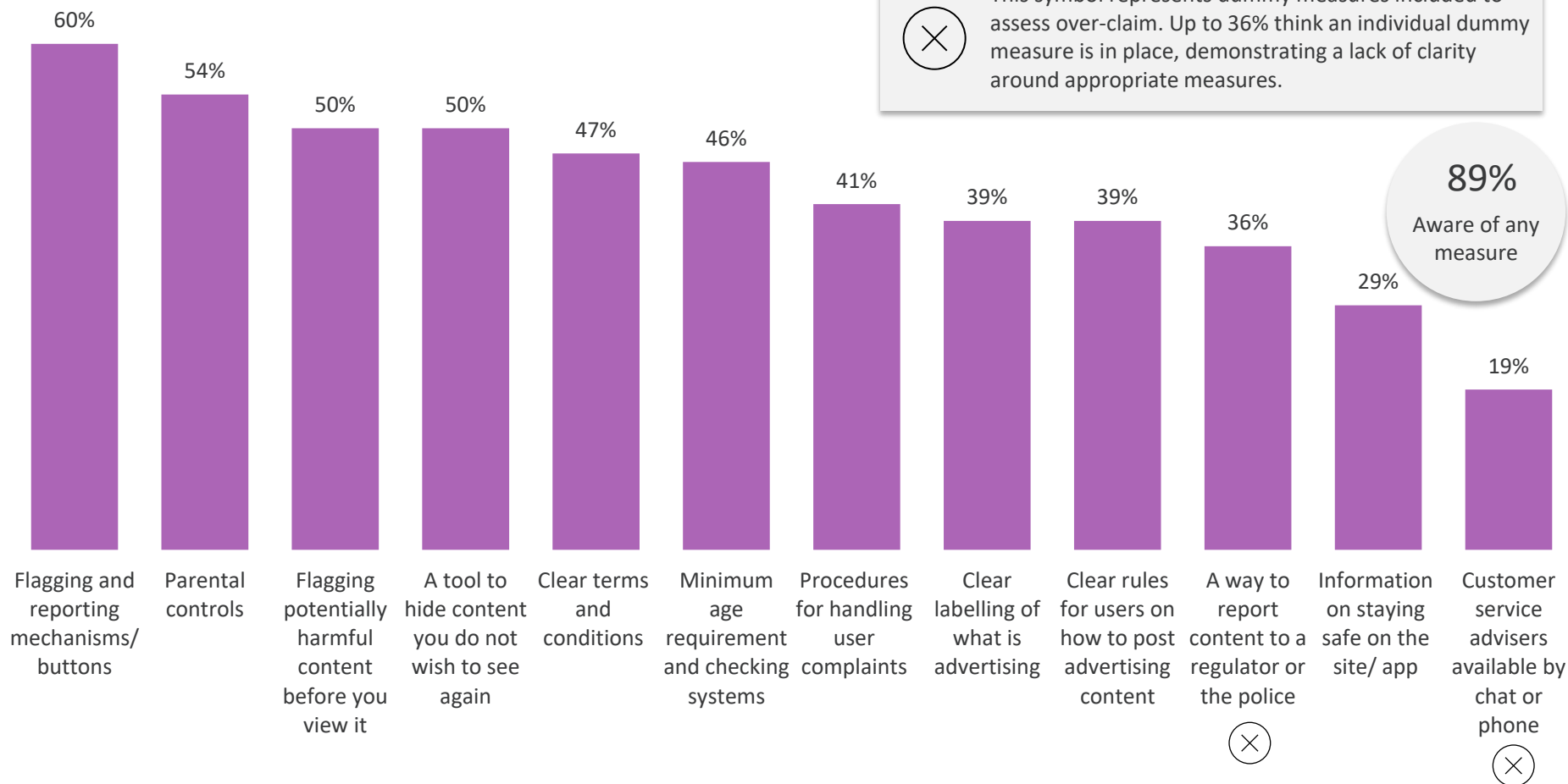|	Facebook	Instagram	YouTube	TikTok	Snapchat	Twitch	Vimeo	LiveLeak*
Recall	33%	26%	26%	24%	21%	20%	13%	10%

Section 3
Safety measures on individual VSPs

Overall, more than half of those surveyed think the listed VSPs have flagging/reporting mechanisms and parental controls in place
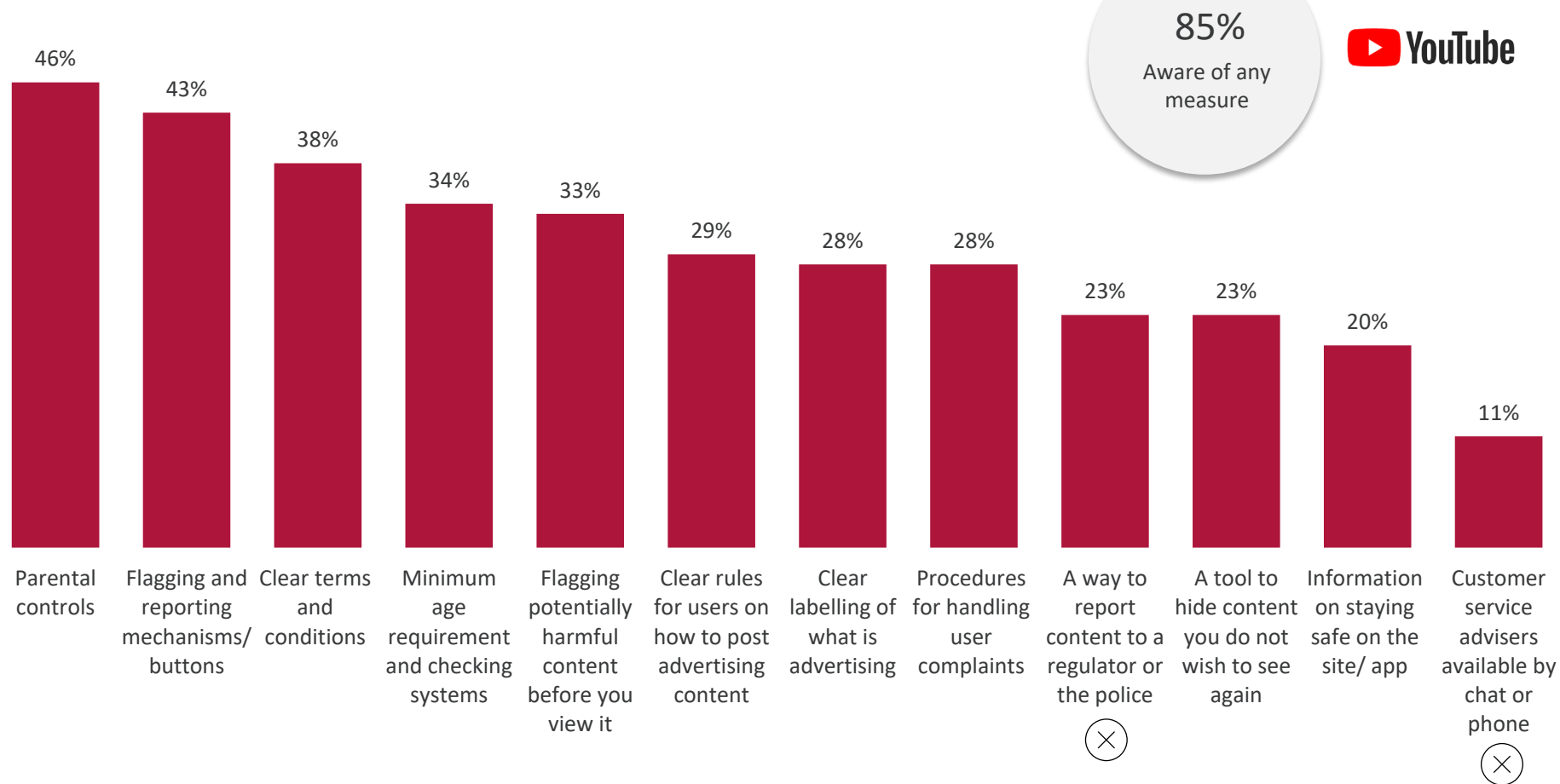
Safety measures users perceive to be in place across the VSPs listed:

This symbol represents dummy measures included to assess over-claim. Up to 36% think an individual dummy measure is in place, demonstrating a lack of clarity around appropriate measures.

89% Aware of any measure

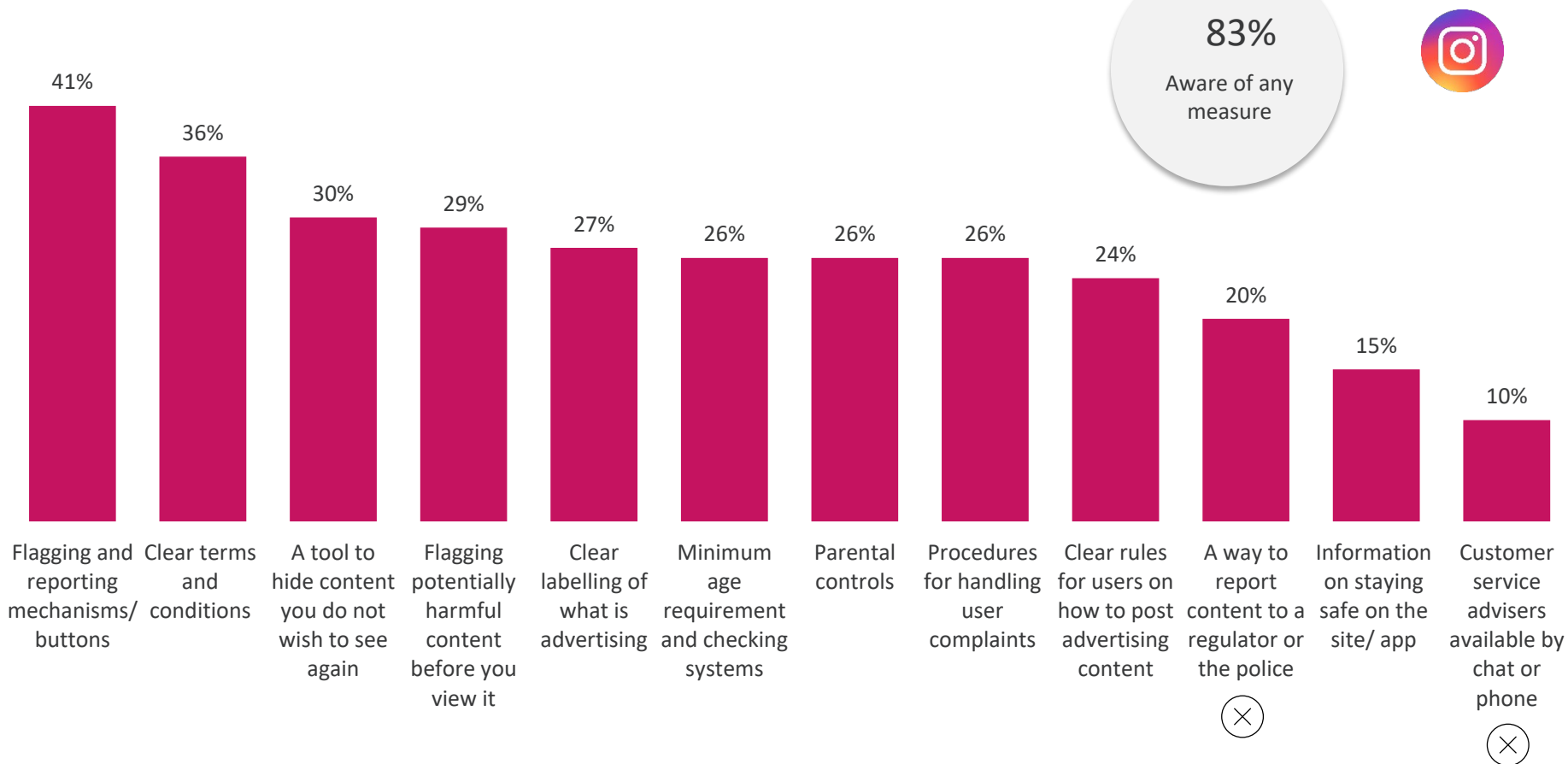| Measure	Percentage
Flagging and reporting mechanisms/ buttons	60%
Parental controls	54%
Flagging potentially harmful content before you view it	50%
A tool to hide content you do not wish to see again	50%
Clear terms and conditions	47%
Minimum age requirement and checking systems	46%
Procedures for handling user complaints	41%
Clear labelling of what is advertising	39%
Clear rules for users on how to post advertising content	39%
A way to report content to a regulator or the police	36%
Information on staying safe on the site/ app	29%
Customer service advisers available by chat or phone	19%

Source: VSP Appropriate Measures Survey
Q10. Which of the following rules or safety measures do you think these sites and apps have in place?
Base: all who have used at least one of the listed VSPs in the last three months, n=1,002

Parental controls are the safety measures most commonly perceived to be in place on YouTube, followed by reporting mechanisms

Safety measures users perceive to be in place on YouTube:

85%
Aware of any measure

▶ YouTube

Measure	%
Parental controls	46%
Flagging and reporting mechanisms/ buttons	43%
Clear terms and conditions	38%
Minimum age requirement and checking systems	34%
Flagging potentially harmful content before you view it	33%
Clear rules for users on how to post advertising content	29%
Clear labelling of what is advertising	28%
Procedures for handling user complaints	28%
A way to report content to a regulator or the police	23%
A tool to hide content you do not wish to see again	23%
Information on staying safe on the site/ app	20%
Customer service advisers available by chat or phone	11%

Compared to YouTube, fewer users believe parental controls are in place on Instagram, with around one-in-four selecting this measure

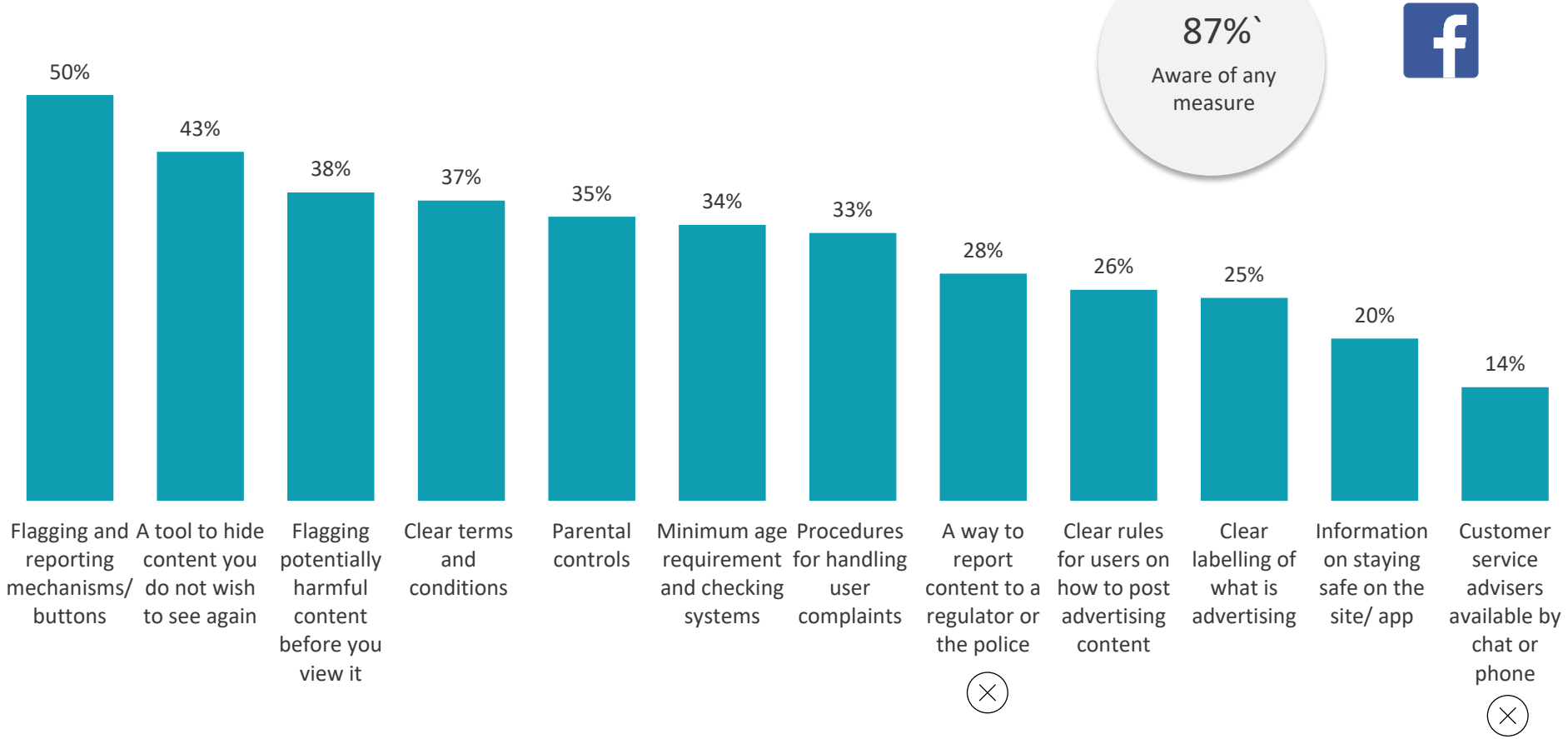Safety measures users perceive to be in place on Instagram:

83% Aware of any measure

Measure	%
Flagging and reporting mechanisms/ buttons	41%
Clear terms and conditions	36%
A tool to hide content you do not wish to see again	30%
Flagging potentially harmful content before you view it	29%
Clear labelling of what is advertising	27%
Minimum age requirement and checking systems	26%
Parental controls	26%
Procedures for handling user complaints	26%
Clear rules for users on how to post advertising content	24%
A way to report content to a regulator or the police	20%
Information on staying safe on the site/ app	15%
Customer service advisers available by chat or phone	10%

Half are aware of flagging and reporting mechanisms being available on Facebook

Safety measures users perceive to be in place on Facebook:

87%`
Aware of any measure

Measure	%
Flagging and reporting mechanisms/ buttons	50%
A tool to hide content you do not wish to see again	43%
Flagging potentially harmful content before you view it	38%
Clear terms and conditions	37%
Parental controls	35%
Minimum age requirement and checking systems	34%
Procedures for handling user complaints	33%
A way to report content to a regulator or the police	28%
Clear rules for users on how to post advertising content	26%
Clear labelling of what is advertising	25%
Information on staying safe on the site/ app	20%
Customer service advisers available by chat or phone	14%

Minimum age requirements and checking systems on TikTok are perceived to be in place by more than one-in-four

Safety measures users perceive to be in place on TikTok:
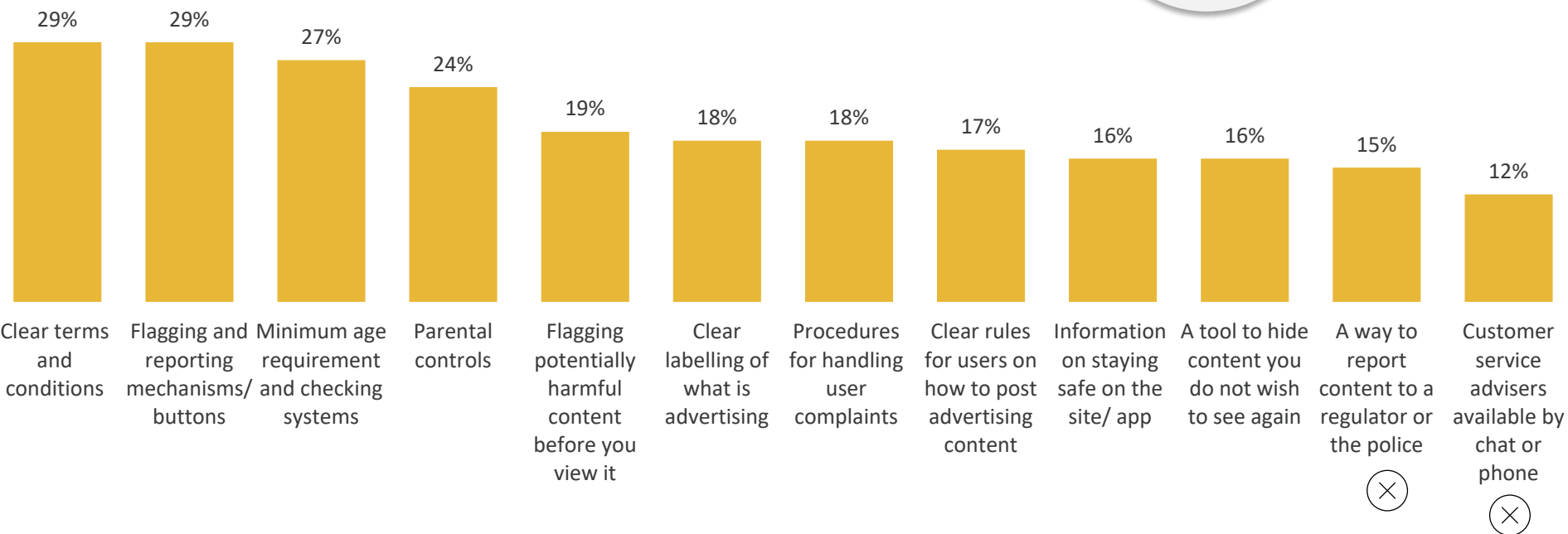
76% Aware of any measure

Measure	%
Flagging and reporting mechanisms/ buttons	33%
Minimum age requirement and checking systems	27%
Clear terms and conditions	26%
Flagging potentially harmful content before you view it	19%
Parental controls	19%
A way to report content to a regulator or the police	19%
A tool to hide content you do not wish to see again	19%
Clear rules for users on how to post advertising content	18%
Clear labelling of what is advertising	17%
Procedures for handling user complaints	17%
Information on staying safe on the site/ app	13%
Customer service advisers available by chat or phone	7%

Minimum age requirements are perceived to be in place by a similar proportion for Snapchat, along with T&Cs and reporting mechanisms

Safety measures users perceive to be in place on Snapchat:

75% Aware of any measure

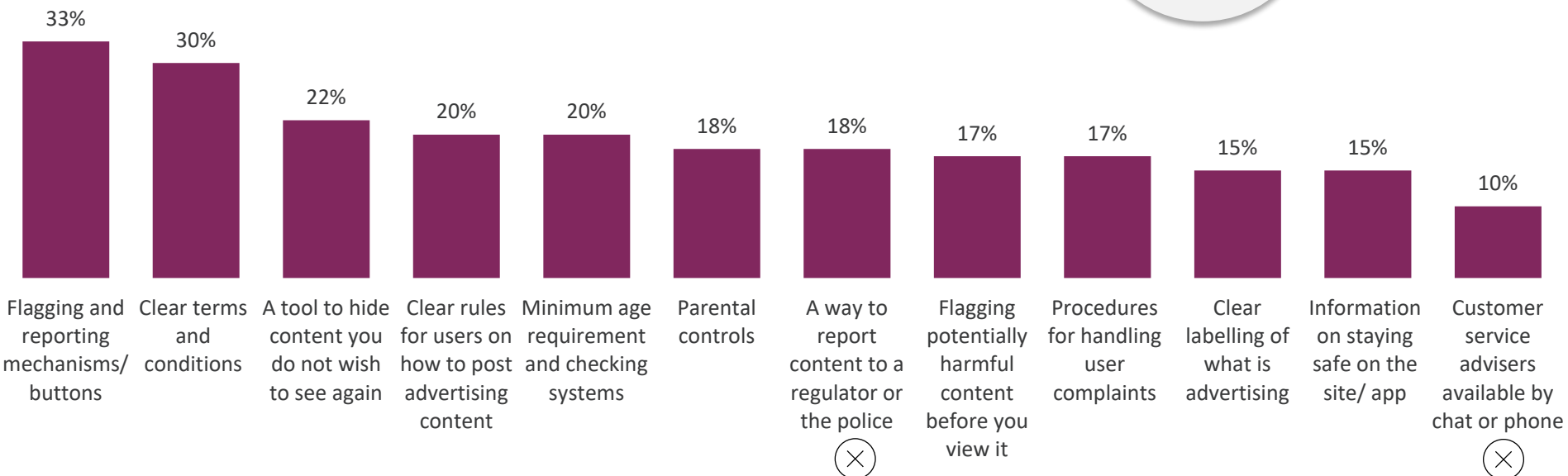| Measure	%
Clear terms and conditions	29%
Flagging and reporting mechanisms/ buttons	29%
Minimum age requirement and checking systems	27%
Parental controls	24%
Flagging potentially harmful content before you view it	19%
Clear labelling of what is advertising	18%
Procedures for handling user complaints	18%
Clear rules for users on how to post advertising content	17%
Information on staying safe on the site/ app	16%
A tool to hide content you do not wish to see again	16%
A way to report content to a regulator or the police	15%
Customer service advisers available by chat or phone	12%

Similarly to TikTok, less than one-in-five users perceive parental controls to be in place on Twitch

Safety measures users perceive to be in place on Twitch:

78% Aware of any measure

Percentage	Measure
33%	Flagging and reporting mechanisms/ buttons
30%	Clear terms and conditions
22%	A tool to hide content you do not wish to see again
20%	Clear rules for users on how to post advertising content
20%	Minimum age requirement and checking systems
18%	Parental controls
18%	A way to report content to a regulator or the police ⊗
17%	Flagging potentially harmful content before you view it
17%	Procedures for handling user complaints
15%	Clear labelling of what is advertising
15%	Information on staying safe on the site/ app
10%	Customer service advisers available by chat or phone ⊗

Even fewer users perceive parental controls to be in place on LiveLeak. Clear terms and conditions are most prominent

Safety measures users perceive to be in place on LiveLeak:

CAUTION: Low base size

75%
Aware of any measure

Measure	%
Clear terms and conditions	30%
Minimum age requirement and checking systems	23%
Clear rules for users on how to post advertising content	19%
Flagging and reporting mechanisms/ buttons	19%
Clear labelling of what is advertising	18%
Procedures for handling user complaints	17%
A tool to hide content you do not wish to see again	17%
Flagging potentially harmful content before you view it	16%
Information on staying safe on the site/ app	13%
Parental controls	12%
Customer service advisers available by chat or phone	8%
A way to report content to a regulator or the police	4%

Users were least likely to be aware of safety measures on Vimeo, with more than one-in-four selecting none of these

Safety measures users perceive to be in place on Vimeo:

72%
Aware of any measure
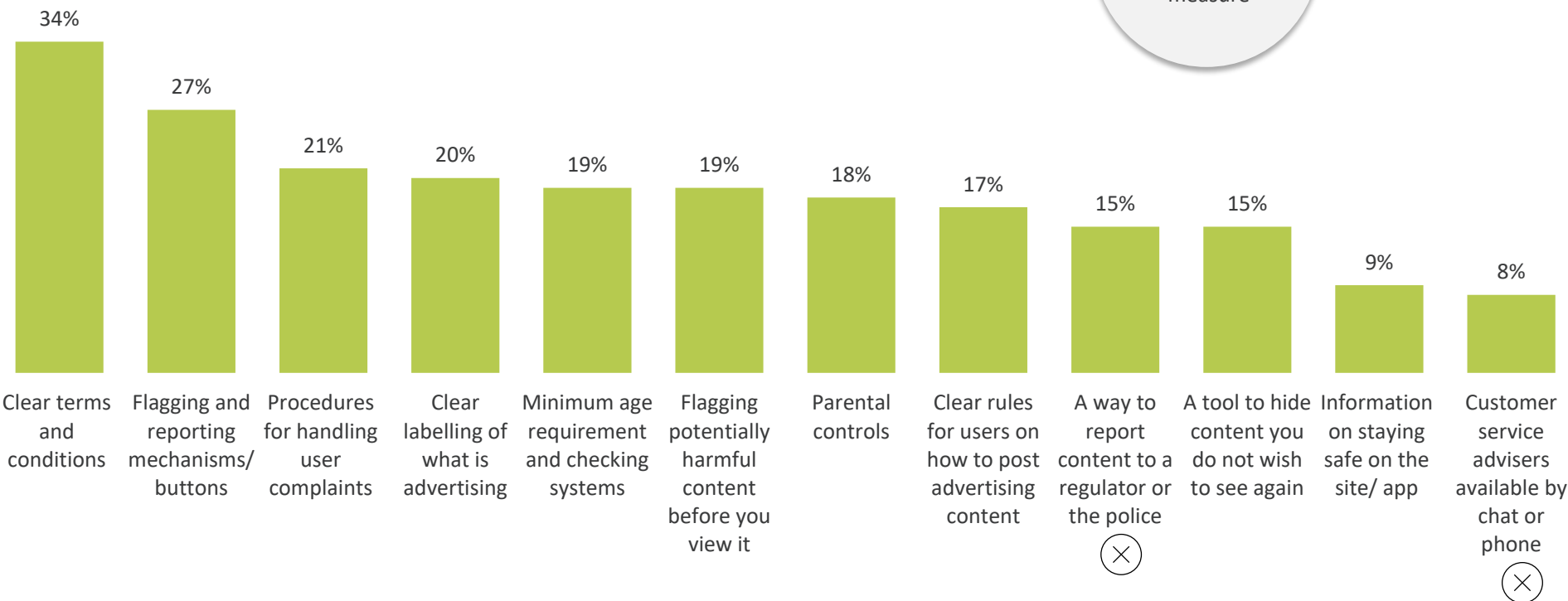
vimeo

Measure	%
Clear terms and conditions	34%
Flagging and reporting mechanisms/ buttons	27%
Procedures for handling user complaints	21%
Clear labelling of what is advertising	20%
Minimum age requirement and checking systems	19%
Flagging potentially harmful content before you view it	19%
Parental controls	18%
Clear rules for users on how to post advertising content	17%
A way to report content to a regulator or the police ⊗	15%
A tool to hide content you do not wish to see again	15%
Information on staying safe on the site/ app	9%
Customer service advisers available by chat or phone ⊗	8%

Section 4
Attitudes towards safety measures

More than half of those surveyed claimed to have never used reporting mechanisms before, particularly respondents aged over 45

Use of reporting mechanisms by core demographics - part 1
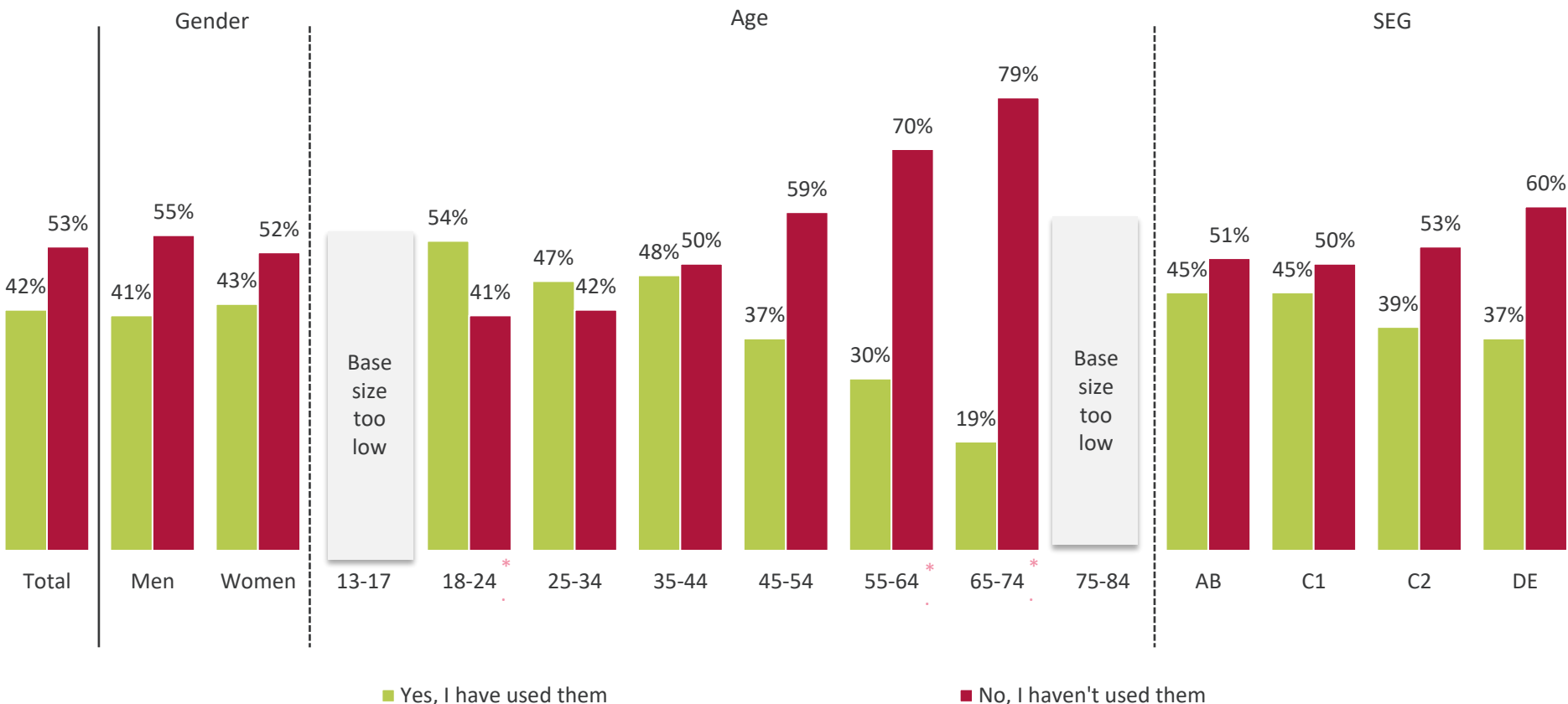
Gender

- Total: 42% (Yes, I have used them), 53% (No, I haven't used them)
- Men: 41%, 55%
- Women: 43%, 52%

Age

- 13-17: Base size too low
- 18-24: 54%, 41% *
- 25-34: 47%, 42%
- 35-44: 48%, 50%
- 45-54: 37%, 59%
- 55-64: 30%, 70% *
- 65-74: 19%, 79% *
- 75-84: Base size too low

SEG

- AB: 45%, 51%
- C1: 45%, 50%
- C2: 39%, 53%
- DE: 37%, 60%

■ Yes, I have used them   ■ No, I haven't used them

Those from minority ethnic groups were the most likely to have used reporting mechanisms before

Use of reporting mechanisms by core demographics - part 2
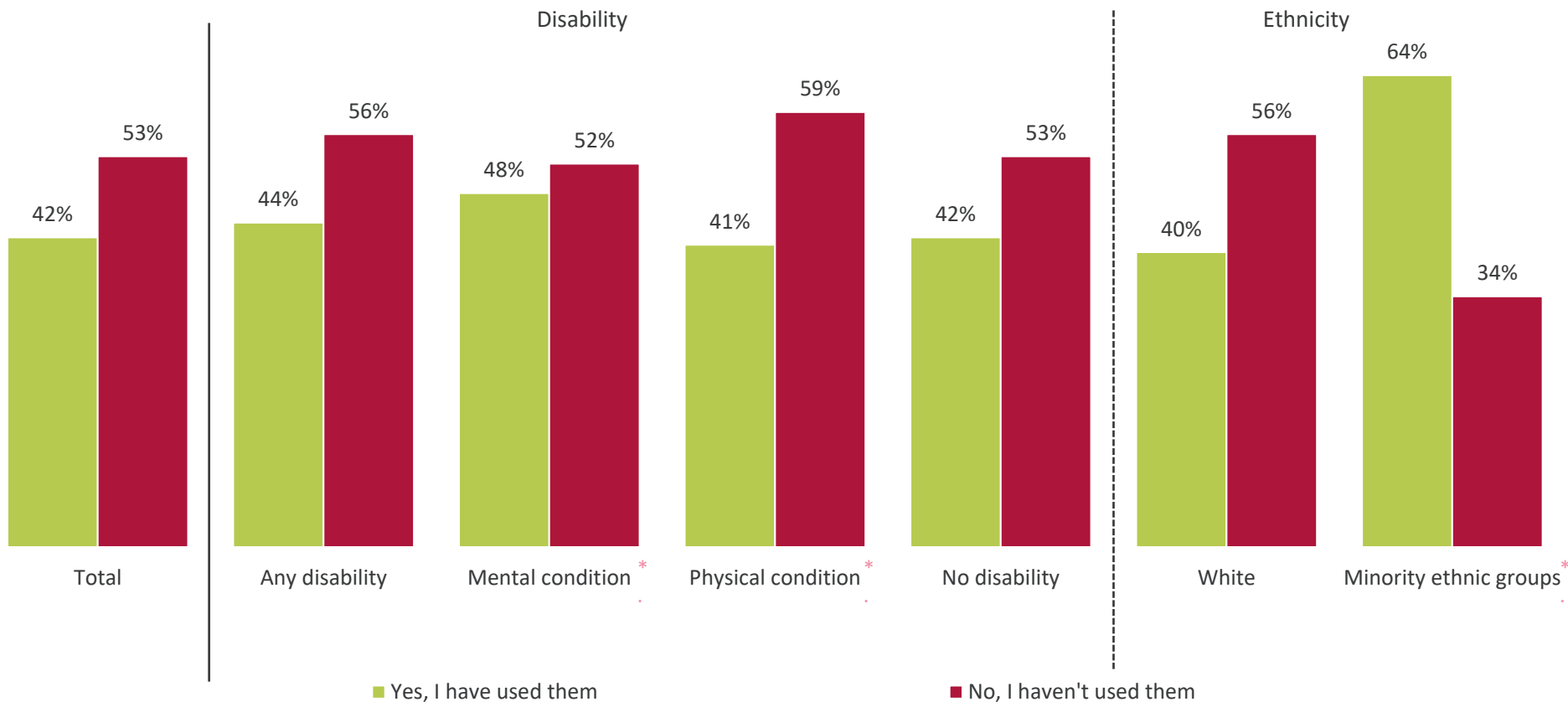
Disability | Ethnicity

- Total: 42% / 53%
- Any disability: 44% / 56%
- Mental condition*: 48% / 52%
- Physical condition*: 41% / 59%
- No disability: 42% / 53%
- White: 40% / 56%
- Minority ethnic groups*: 64% / 34%

■ Yes, I have used them   ■ No, I haven't used them

28

Ease of findings reporting mechanisms is not a particular barrier to using the measure

Ease of use for reporting mechanisms:
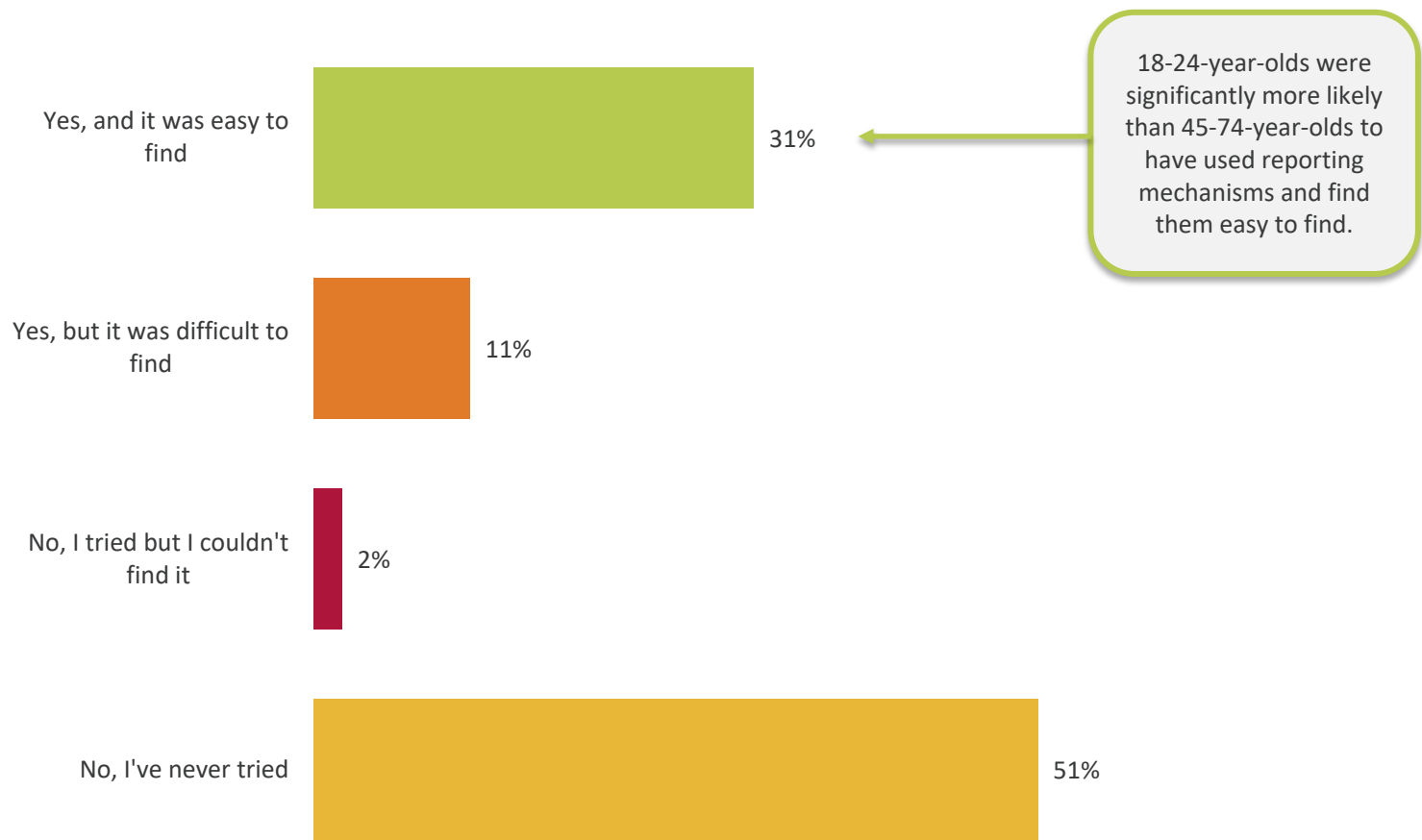
18-24-year-olds were significantly more likely than 45-74-year-olds to have used reporting mechanisms and find them easy to find.

Category	Percentage
Yes, and it was easy to find	31%
Yes, but it was difficult to find	11%
No, I tried but I couldn't find it	2%
No, I've never tried	51%

Around two-in-five agree that rules should be consistent across VSPs and that stricter rules and regulations are needed on these sites

Views on safety measures:
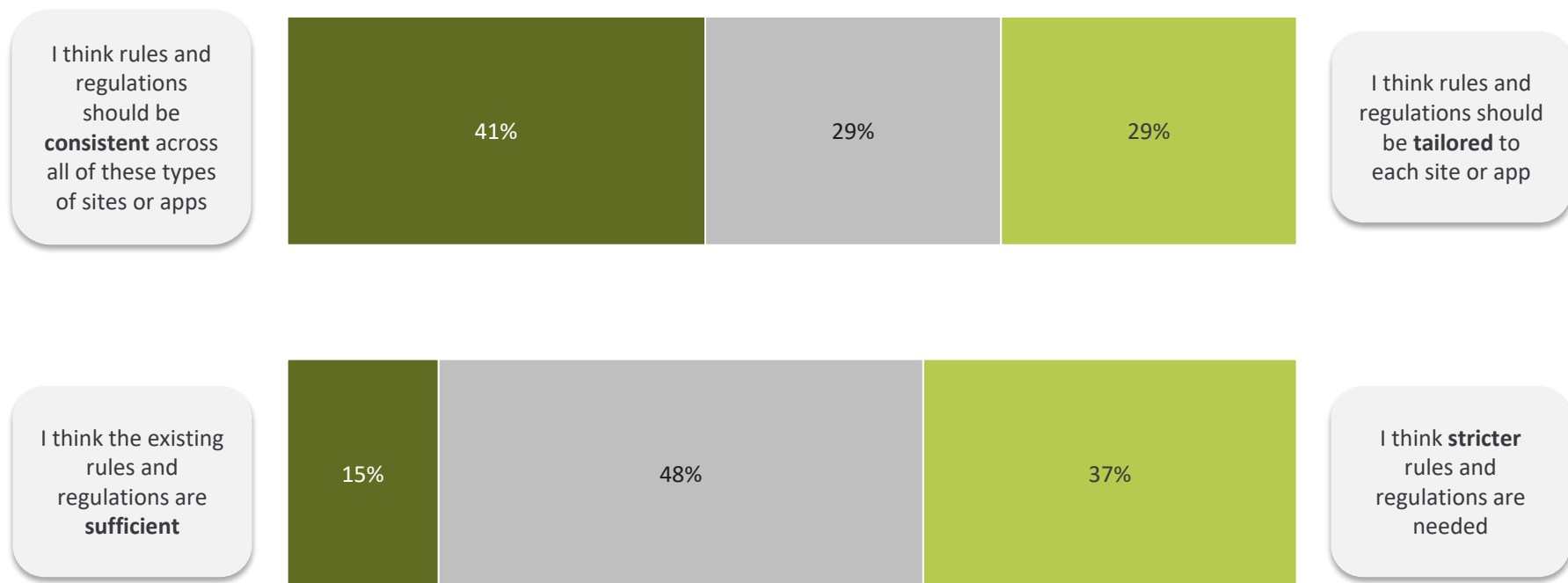
| I think rules and regulations should be **consistent** across all of these types of sites or apps | 41% | 29% | 29% | I think rules and regulations should be **tailored** to each site or app |

| I think the existing rules and regulations are **sufficient** | 15% | 48% | 37% | I think **stricter** rules and regulations are needed |

■ Agree with the statement on the left (0-3)   ■ Neither agree nor disagree with either statement (4-7)   ■ Agree with the statement on the right (8-10)

Safety measures felt to be key for most content, but are seen as less necessary for misleading information and unhealthy diets

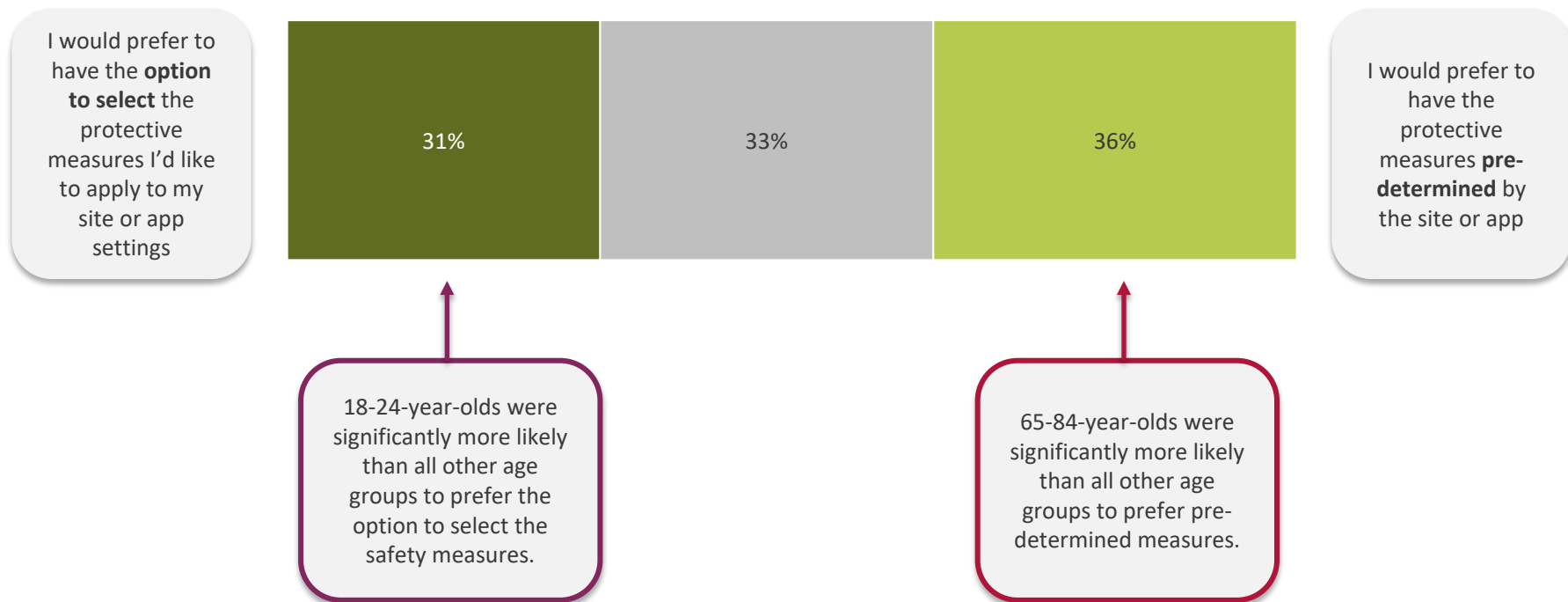Perceived need for safety measures for the following types of content:

84%	84%	83%	82%	81%	66%	66%
15%	14%	15%	17%	15%	29%	29%
				4%	6%	5%
Rules to protect children from seeing sexual content	Videos which encourage people to harm themselves	Videos promoting violence	Rules to protect children from seeing or experiencing innappropriate content	Videos promoting hate towards others	Videos which encourage unhealthy diets or eating disorders	Misleading information e.g. fake news or conspiracy theories

■ Safety measures are not needed (0-3) ■ Safety measures are somewhat needed (4-7) ■ Safety measures are definitely needed (8-10)

Opinion is split on whether safety measures should be selected by users or pre-determined by the platform

Views on the application of safety measures:

I would prefer to have the **option to select** the protective measures I'd like to apply to my site or app settings

| 31% | 33% | 36% |

I would prefer to have the protective measures **pre-determined** by the site or app

18-24-year-olds were significantly more likely than all other age groups to prefer the option to select the safety measures.

65-84-year-olds were significantly more likely than all other age groups to prefer pre-determined measures.

■ Agree with the statement on the left (0-3)   ■ Neither agree nor disagree with either statement (4-7)   ■ Agree with the statement on the right (8-10)

Section 5
Attitudes towards implementation of safety measures

Three-in-four agree that a VSP should take action against content it feels breaks the sites/apps rules

Extent of agreement that the site/app should take action against content it feels breaks the sites/apps rules:

| 45% | 32% | 13% | 4% | 4% |

Those aged 55+ are significantly more likely than other age groups to agree that sites/apps should take action against content which breaks the rules.

18-24-year-olds are the most likely to neither agree nor disagree that sites/apps should take action against content which breaks the rules.

■ Strongly agree ■ Slightly agree ■ Neither agree nor disagree ■ Slightly disagree ■ Strongly disagree

When resolving a breach of the rules, two-in-three of those surveyed felt action should be taken immediately

How long a site/app should take to solve a breach of its safety measures:

| 68% | 21% | 5% | | |

Those aged 55+ are the most likely to say immediate action is necessary to solve a breach of the site's/app's rules.

18-24-year-olds are the most likely to say VSPs should have up to 24 hours to act against a breach of the rules.

■ Action should be taken immediately ■ Up to 24 hours ■ Up to 7 days ■ Up to 1 month ■ More than 1 month/as long as is needed