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The VSP Landscape

Understanding the video-sharing platform industry in the UK

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1. The VSP landscape

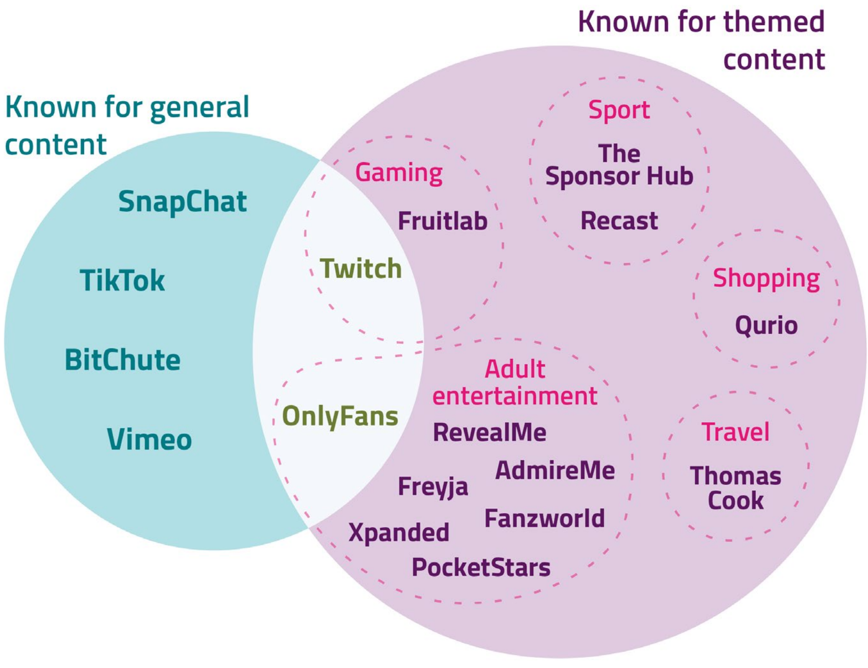
This chapter brings together a variety of Ofcom and industry data sources to give an introduction to who the notified video-sharing platforms (VSPs) are, who uses them and how they earn revenue. This data and research focused chapter provides context to the protection measures examined in the 2022 VSP Report, as understanding the audience size and nature of platforms helps us understand whether the safety measures being taken are appropriate. We explore:

- Who are the notified VSP providers that are regulated by Ofcom? (**The UK video-sharing platform industry**)
- How many users of video-sharing platforms are there in the UK? (**UK audiences**)
- What are the main business models used by VSP providers? (**Business models**)
- What information do VSP providers currently publish in their transparency reports? (**Publicly available transparency reports**)

The UK video-sharing platform industry

There are many platforms that allow users to share videos that exist across a range of online sectors, including social media, gaming streaming services and adult content sites. Some of these have the required connection with the UK to be regulated under the VSP regime and have notified to Ofcom (referred to here as the notified VSP providers). Other well-known platforms such as Facebook, Instagram and YouTube have not notified to Ofcom as VSPs within scope of the UK regime.

Figure 1: Notified VSP providers and the content types they may be known for



Source: Ofcom desk research and information provided to Ofcom by VSP providers upon notification.

Figure 2: List of notified VSPs* and their functionality

	Notified VSPs	Parent company	UK launch date	Minimum age	Functionality available on platform			
					Livestreaming	Short time-expiring videos or 'stories'	Private messages	Subscription
Group A	**BitChute**	Bit Chute Limited	Jan 2017	16	Currently testing	No	No	No
Group A	**OnlyFans**	Fenix International Limited	Sep 2016	18	Yes	Yes	Yes	Yes
Group A	**Snapchat**	Snap Group Limited	Feb 2016†	13	Yes	Yes	Yes	Yes
Group A	**TikTok**	ByteDance	Aug 2018	13	Yes	Yes	Yes (friends only)	No
Group A	**Twitch**	Amazon Inc.	Jun 2011	13	Yes	No	Yes	Yes
Group A	**Vimeo**	Vimeo Inc.	Feb 2005	16	Yes	No	Yes	Yes
Group B	**Admire Me**	Kiwi Leisure Ltd	Sep 2019	18	No	No	Yes (paid for)	Yes
Group B	**Fanzworld**	Promo1 Limited	Apr 2020	18	No	No	Yes	Yes
Group B	**Freyja**	Projekt Freyja Ltd	Mar 2022	18	No	No	Yes	Yes
Group B	**Pocket Stars**	Pocket Stars Ltd	Sep 2020	18	No	No	Yes	Yes
Group B	**RevealMe**	Tapnet Ltd	Feb 2021	18	Yes	No	Yes	Yes
Group B	**Xpanded**	Visional Media Limited	Sep 2009	18	Yes	No	Yes	Yes
Group C	**Fruitlab**	Fruitlab Media Limited	Jun 2019	13	Yes, but via Twitch	No	Yes	Yes
Group C	**Qurio**	QVC UK	May 2021	18	No	No	No	No
Group C	**Recast Sports**	Recast Sports Ltd	May 2021	16	Yes	No	No	Yes
Group C	**The Sponsor Hub**	The Sponsor Hub Ltd	Jun 2020	16	No	No	No	No
Group C	**Thomas Cook**	Thomas Cook Tourism (UK) Company Ltd	Jun 2021	18	No	No	No	No

*Source: Ofcom desk research (including review of platform sites/apps, their terms & conditions, and web articles) and information provided to Ofcom by VSP providers upon notification and in Spring 2022 formal information request. Ofcom has organised the notified VSP providers into broad groups; **Group A** denotes larger VSPs, **Group B** denotes smaller VSPs that host adult content, and **Group C** denotes other smaller VSPs. See Video-sharing platforms: Ofcom's plan and approach (ofcom.org.uk) for full detail. *List of notified VSPs correct as of June 2022 when Ofcom's formal information requests were sent to VSPs. † Refers to date that Snapchat services under scope of VSP regulation (Discover and Spotlight) launched.*

UK audiences

Data sources overview: This section presents data provided by Ipsos iris, the UKOM-accredited[1] online audience measurement currency, which Ofcom uses as its primary method of measuring online audiences. Ipsos iris measures the websites and apps visited by UK internet users aged 15+ only.[2] However, it does not indicate whether a visitor to a platform viewed, uploaded or interacted with a video on the platform. For insight into users' video activity on platforms we feature findings from Ofcom's Adults' Media Literacy Tracker 2021, Children's and Parents' Media Literacy Tracker 2021[3] and Children's Online User Ages Quantitative Research Study 2022.

The majority (88%) of UK individuals aged 16+ watch videos online

Ofcom's Adults' Media Literacy Tracker survey showed that in 2021, 88% of UK individuals aged 16+ used online platforms to watch videos or clips.[4] Facebook was the highest reaching platform with video sharing capability among UK adults, with 45 million UK adults visiting Facebook (including Facebook Messenger) in April 2022, equating to 94% of the UK online adult population.[5] Facebook was closely followed by YouTube, which reached 43 million (91%). TikTok and Snapchat[6] are the only notified VSPs in the top 10 highest reaching VSPs among adults, reaching 34% and 20% of online adults aged 18+ respectively (see **Figure 3**). The other notified VSPs have a smaller UK adult 18+ reach of 5% or less.

Young people are spending over an hour a day on TikTok

TikTok is particularly popular among teenagers, reaching 66% of 15-17-year-olds, according to Ipsos iris data. In April 2022 TikTok users aged 15-17 spent an average of one hour and one minute per day on TikTok, up from 45 minutes in May 2021. Time spent on TikTok by all users aged 15+ has been steadily increasing over the VSP performance period, with adults spending 29 minutes per day in April 2022, up by 7 minutes since May 2021.[7] In July 2021, TikTok increased the maximum video length from one minute to three minutes, and by October 2021 the average video length was two minutes, which may be contributing to the increased time spent on TikTok.[8]

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[1] The UK Online Measurement Company or UKOM defines and governs the UK standard for audience measurement.
[2] Ipsos iris data is not available for all notified VSPs due to some platforms having a small number of visitors and therefore not meeting minimum reporting thresholds. Data is available on Ipsos iris for the following notified platforms: **TikTok, Snapchat, Twitch, Vimeo, OnlyFans, Thomas Cook and BitChute**. We feature **April 2022** Ipsos iris data to align with the final month of the VSP performance period (May 2021 - April 2022). Visitor ages are determined by Ipsos iris' panel of 10,000 people aged 15+ in the UK who register their demographic profile when they sign up to have their device(s) internet use measured.
[3] The results of two survey waves have been aggregated; Wave 1 was conducted in Jul-Aug 2021, Wave 2 in Sep-Oct 2021.
[4] Ofcom's Adults Media Literacy Tracker: Adults' Online Behaviours and Attitudes 2021 (Wave 1 and 2 Combined) (ofcom.org.uk), 16+, UK. Platforms used to watch videos or clips included: BitChute, Dailymotion, Dubsmash, Facebook (including Facebook Gaming), Instagram, OnlyFans, Snapchat, TikTok, Twitch, Vimeo, YouTube.
[5] © Ipsos, Ipsos iris Online Audience Measurement Service, 1 – 30 April 2022, age 18+, UK.
[6] Note that Ipsos iris data for Snapchat refers to the whole service, whereas Snapchat has only notified the Discover and Spotlight sections of its service as within scope of the VSP regime.
[7] © Ipsos, Ipsos iris Online Audience Measurement Service, 1 – 30 April 2022 & 1 - 31 May 2021, age 15+, UK.
[8] Discover more ways to create, connect and be entertained with longer videos on TikTok (newsroom.tiktok.com), October 2021.

Figure 3: Top twenty video-sharing platforms by UK adult reach, by age: April 2022

		All adults 18+		Young adults 18-24		Teenagers 15-17	
	Platform	Unique visitors	Online reach	Unique visitors	Online reach	Unique visitors	Online reach
1	Facebook & Messenger	44.9m	94%	5.0m	93%	2.0m	93%
2	YouTube	43.3m	91%	5.2m	97%	2.1m	96%
3	Instagram	33.9m	71%	4.8m	88%	1.9m	88%
4	Twitter	24.1m	51%	3.3m	61%	1.3m	62%
5	LinkedIn	18.4m	39%	2.4m	45%	1.0m	45%
6	TikTok	16.1m	34%	3.6m	66%	1.4m	66%
7	Reddit	15.0m	31%	3.3m	62%	1.3m	61%
8	Pinterest	12.7m	27%	1.8m	33%	703k	32%
9	Snapchat	9.7m	20%	3.5m	65%	1.4m	65%
10	Discord	4.3m	9%	1.5m	28%	614k	28%
11	Telegram	2.8m	6%	446k	8%	183k	8%
12	Dailymotion	2.6m	5%	364k	7%	137k	6%
13	Tumblr	2.3m	5%	689k	13%	284k	13%
14	Twitch	2.2m	5%	864k	16%	347k	16%
15	Vimeo	1.9m	4%	269k	5%	109k	5%
16	OnlyFans	1.3m	3%	293k	5%	*	*
17	Thomas Cook	574k	1%	75k	1%	33k	2%
18	BitChute	202k	0.4%	9k	0.2%	3k	0.1%
19	Behance	185k	0.4%	44k	1%	18k	1%
20	Imgur	122k	0.3%	21k	0.4%	8k	0.4%

Source: © Ipsos, Ipsos iris Online Audience Measurement Service, 1 – 30 April 2022, organisation [ORG] or brand group [BG], age 15+, UK. Note: Custom list defined by Ofcom. ***Excludes adult/pornographic platforms unless they are notified VSP providers****. Data captures visits to the platform's website browser and app from a smartphone, tablet or laptop/computer (but excludes TV set and smart hub use). Platform names coloured pink denote they are a notified VSP provider. *Ofcom is still engaging with OnlyFans about these figures.*

Figure 4: Average time spent per day by platform visitors, by age: April 2022 (hours:mins:sec)

	Platform	All adults 18+	Young adults 18-24	Teenagers 15-17
1	Facebook & Messenger	00:33:25	00:22:51	00:22:47
2	TikTok	00:28:42	01:00:50	01:01:22
3	Snapchat	00:22:28	00:41:21	00:41:03
4	Imgur	00:13:07	00:03:47	00:04:49
5	Instagram	00:09:39	00:20:09	00:20:03
6	Discord	00:07:29	00:10:10	00:10:01
7	Twitter	00:05:41	00:08:33	00:08:38
8	Reddit	00:04:58	00:06:26	00:06:28
9	Twitch	00:04:47	00:04:38	00:04:30
10	LinkedIn	00:02:08	00:01:59	00:01:52
11	Telegram	00:02:05	00:00:57	00:01:02
12	Tumblr	00:01:50	00:01:46	00:01:47
13	OnlyFans	00:01:37	00:01:38	*
14	Pinterest	00:01:11	00:01:50	00:01:46
15	BitChute	00:00:16	00:00:00	00:00:00
16	Vimeo	00:00:13	00:00:07	00:00:07
17	Dailymotion	00:00:11	00:00:09	00:00:10
18	Thomas Cook	00:00:09	00:00:05	00:00:05
19	Behance	00:00:07	00:00:07	00:00:06

Source: © Ipsos, Ipsos iris Online Audience Measurement Service, 1 – 30 April 2022, organisation [ORG] or brand group [BG], age 15+, UK. Note: ***Average time spent figure for YouTube is not available*** *and is being developed by Ipsos. Custom list defined by Ofcom.* ***Excludes adult/pornographic platforms unless they are notified VSP providers****. Data captures visits to the platform's website browser and app from a smartphone, tablet or laptop/computer (but excludes TV set and smart hub use). Platform names coloured pink denote they are a notified VSP provider. *Ofcom is still engaging with OnlyFans about these figures.*

Demographics: Notified VSP audiences by age, gender and UK nation

Several Group A VSPs have a younger adult, and majority male audience

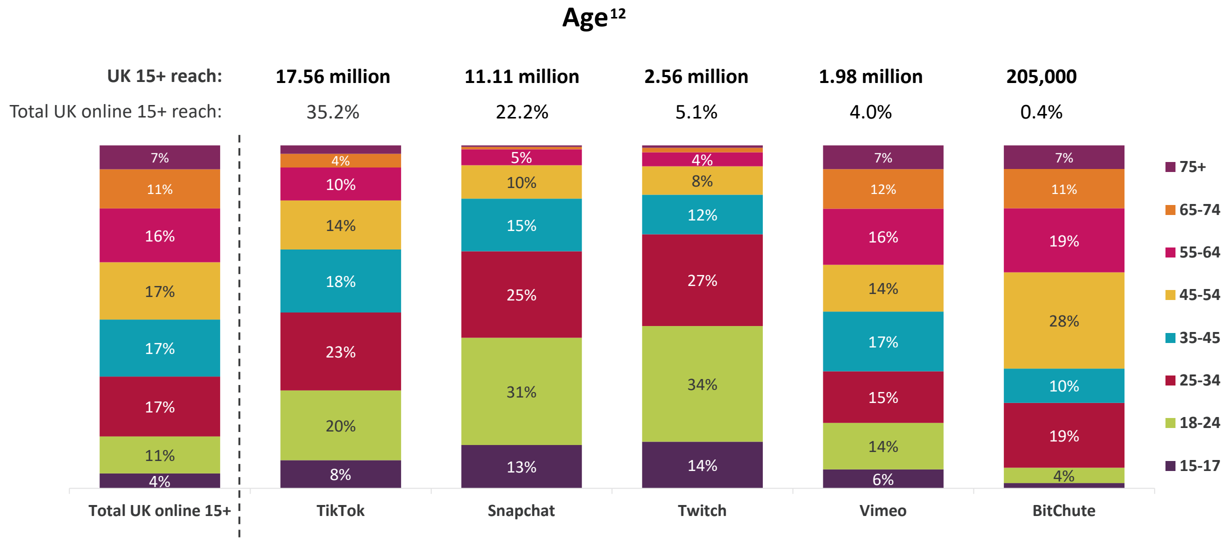
According to Ipsos iris data (see **Figure 5**), **Twitch** has a young userbase; nearly half of Twitch's UK aged 15+ audience in April 2022 were aged 15-24. The majority of Twitch visitors were male (74% male vs 26% female); however, women spent slightly longer on the platform than men.[9] Twitch had 7.7 million global channels streaming in April 2022.[10]

OnlyFans' UK userbase is also predominantly younger and male. OnlyFans is particularly popular with young adults aged 18-34. In April 2022, over half (57%) of OnlyFans' total UK audience aged 15+ were aged 18-34, and 89% of visitors were male.[11]

Unlike most of the Group A VSP platforms, **BitChute**'s UK age 15+ reach skews towards an older audience, with those aged 45-54 being the most likely age group to visit the platform (45-54s made up 28% of BitChute's UK aged 15+ audience in April 2022).

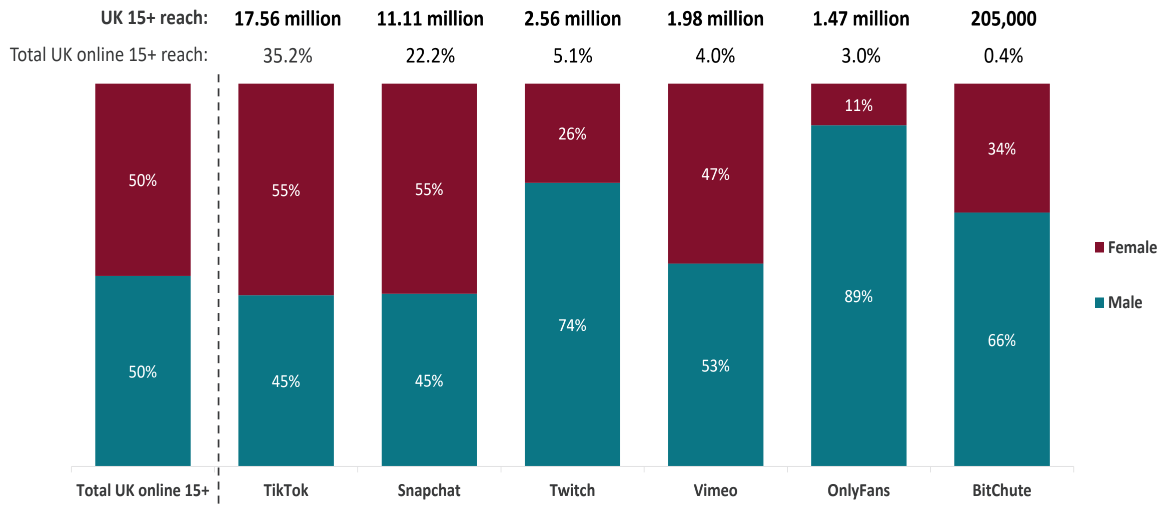
TikTok and **Snapchat** are the only Group A VSPs to have more female than male visitors, with women forming 55% of their UK audience respectively aged 15+ in April 2022.

Figure 5: UK age 15+ audience composition in April 2022 of Group A notified VSP platforms: by age, gender and UK nation

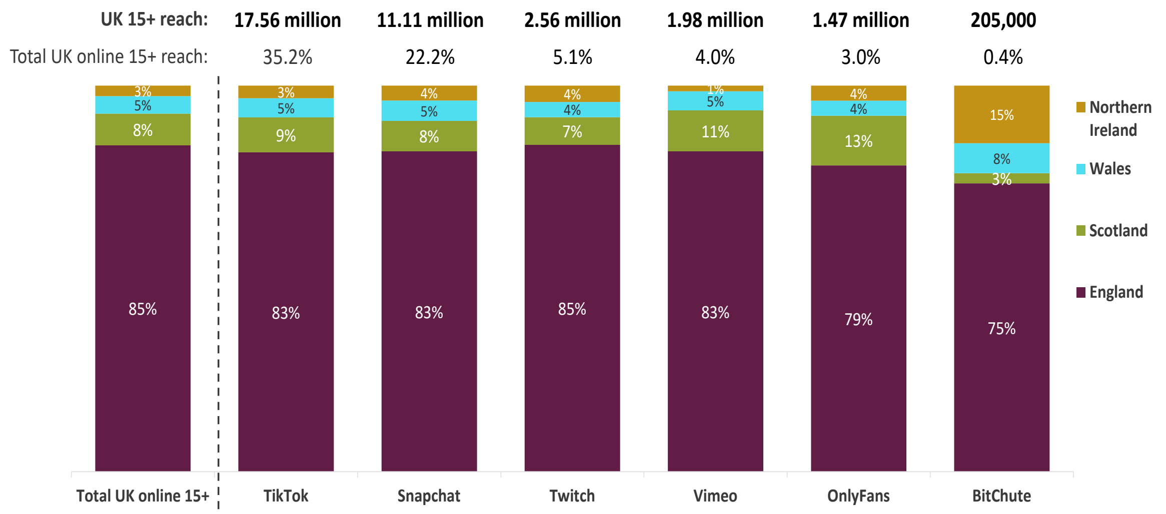


9 Women spent an average of 2 hours and 45 minutes on Twitch between 1-30 April 2022, while men spent 2 hours and 15 minutes. Source: © Ipsos, Ipsos iris Online Audience Measurement Service, 1 - 30 April 2022, age: 15+, UK.
10 Total Twitch streamers (twitchtracker.com) accessed 2 September 2022.
11 © Ipsos, Ipsos iris Online Audience Measurement Service, 1 - 30 April 2022, age: 15+, UK.
12 Age chart excludes Group A VSPs that may also be adult content sites.

Gender



UK nation



Source: © Ipsos, Ipsos iris Online Audience Measurement Service, 1 - 30 April 2022, age 15+, UK.

Nearly all UK children use online platforms with video sharing capabilities

Ofcom's Children's and Parents' Media Literacy 2021 study showed that use of video-sharing platforms was the most-cited online activity among all children aged 3-15 (94%). Use among children increases with age, with almost all (98%) 12-15-year-olds reporting they watch content on video-sharing platforms.

Figure 6: VSPs used to watch videos, by age group[13]

3-4 year olds	5-7 year olds	8-11 year olds	12-15 year olds
89%	93%	95%	98%

[13] In this study, parents answered on behalf of children aged 3-7. Parents may or may not have been supervising their child during their use of VSP platforms.

Source: Ofcom Children's and Parents' Media Literacy 2021: Online Behaviours and Attitudes survey, waves 1 & 2 combined. QP5/ QC4: Which, if any, of these apps or sites does your child watch videos on? (RESPONSES FROM PARENT FOR 3-7 YEAR OLDS AND FROM CHILDREN AGED 8-17) (MULTI CODE). Base: 3-4 year-olds: 1,184, 5-7 year-olds: 1,480, 8-11 year-olds: 1,628, 12-15 year-olds: 1,569.

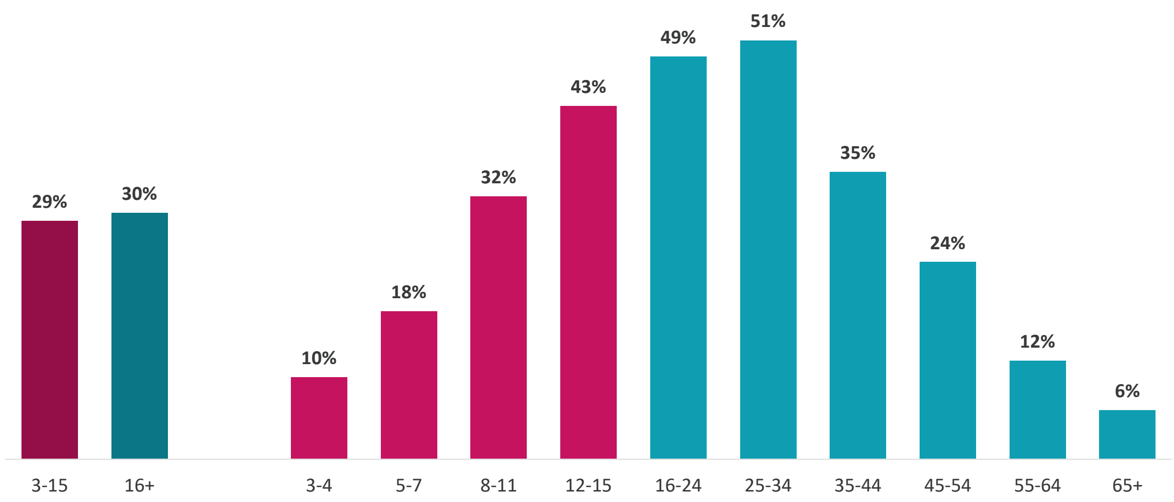
A third of children (aged 8-17) have a false social media age of 18+

Ofcom's Children's Online User Ages Quantitative Research Study 2022 found that a third (32%) of children aged between 8 and 17 with a social media profile have an adult user age (18+) after signing up with a false date of birth.[14] Children aged 8-12 were more likely to tell us they had used a false date of birth when signing up to TikTok; 65% of 8-12 told us they used a false date of birth to make them appear older when setting up their profile on TikTok and 59% reported doing so on Snapchat.[15]

Half of 16-34s say they upload their own videos to video-sharing platforms

According to Ofcom's Adults' Media Literacy 2021 survey, three in ten (30%) internet users aged 16+ were uploading their own videos to video-sharing platforms in 2021, and this was more common among 16-34s, at 50%.[16] A smaller minority (16%) of internet users aged 16+ were posting or sharing live-streamed videos, and again, this was more common among 16-34s, at 28%. Among live-streamers, both overall and age 16-34s, Instagram was the most commonly used site or app for uploading and live streaming, followed by YouTube, Facebook and TikTok. Among children aged 3-15, 29% posted videos that they had made themselves, raising to 43% of older children aged 12-15.[17]

Figure 7: UK individuals that upload videos they have made themselves



*Source: **3-15-year-olds**: Ofcom Children's and Parents' Media Literacy 2021: Online Behaviours and Attitudes survey. QP6/ QC5: Does your child ever upload videos online that they have made themselves? Base: 3-4-year-olds: 1,184, 5-7-year-olds:*

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[14] Ofcom Children's Online User Ages Quantitative Research Study 2022. Current user age based on C3a, Q5, Q8. Base: All respondents aged 8-17 with their own profile and knew how long they had used the platform (844).
[15] Source: Ofcom Children's Online User Ages Quantitative Research Study 2022. Q7: What date of birth was used when the profile was set up? Please remember you won't get in trouble or lose your profile for answering truthfully. Base: 8-12-year-olds with their own profile on: Facebook (96*); YouTube (177); Snapchat (107); Instagram (86*); TikTok (161); Twitter (30**) - *CAUTION – Low base size, figures are indicative only; **CAUTION – VERY low base size.
[16] Ofcom Adults' Media Literacy Tracker 2021: Online Behaviours and Attitudes survey.
[17] Ofcom Children's and Parents' Media Literacy Tracker 2021: Online Behaviours and Attitudes survey.

1,480, 8-11-year-olds: 1,628, 12-15-year-olds: 1,569. ***Ages 16+:*** *Ofcom Adults' Media Literacy Tracker 2021: Online behaviours and attitudes survey. IN8. Do you ever upload videos online that you have made yourself? (single coded). Base: All adults (3898).*

Figure 8: Apps or sites UK individuals aged 16+ that upload videos, use to upload videos that they have made themselves

VSP	16+	16-24	25-34	35-44	45-54	55-64
Instagram	50%	57%	57%	49%	41%	28%
YouTube	48%	46%	50%	47%	51%	47%
Facebook	46%	21%	48%	54%	61%	61%
TikTok	38%	58%	43%	28%	27%	10%
Snapchat	32%	53%	35%	22%	21%	6%
Twitch	9%	12%	11%	7%	6%	3%
Vimeo	6%	4%	7%	5%	8%	5%
OnlyFans	5%	5%	7%	5%	2%	2%
Dailymotion	4%	3%	8%	3%	5%	2%
BitChute	3%	1%	6%	3%	3%	0%
Dubsmash	3%	3%	5%	4%	1%	0%

Source: Ofcom Adults' Media Literacy Tracker 2021: Online behaviours and attitudes survey. IN9: And which of these apps or sites do you use to upload your own videos (that you have made yourself)? (MULTI CODE). Base: All respondents who upload videos online that they have made themselves. Note: Platform names coloured pink denote they are a notified VSP provider. Facebook includes Facebook Gaming.

Business models

VSP providers differ in size and generate revenue in multiple ways. Eight of the notified VSPs are micro or small companies[18] such as BitChute, while others are owned by large international companies such as Amazon (Twitch) and ByteDance (TikTok).

VSP providers continue to innovate in and develop the following revenue streams

Advertising	Advertising, the main revenue stream for many VSPs, can be sold by the platforms themselves or through intermediaries, and some offer self-service interfaces such as Snapchat Ads Manager. On **Snapchat** and **TikTok**, adverts often take the form of videos themselves, among content creator content. Platforms featuring adult or mature themed content such as **OnlyFans** and **BitChute** are less reliant on advertising due to restrictions from mainstream advertisers.

[18] Size here refers to companies' reported global revenue. A small company is defined as one who has either a turnover of £10.2 million or less; £5.1 million or less on its balance sheet or 50 employees or less. Micro-entities are very small companies, defined as those that have either a turnover of £632,000 or less, £316,000 or less on its balance sheet or 10 employees or less. Source: GOV.UK, Prepare annual accounts for a private limited company, accessed 11 October 2022.

Subscriptions	Some platforms such as **OnlyFans** and **Twitch** offer subscriptions where users pay to access content from a creator and the platform takes a portion of revenue generated. Subscriptions may enable users to access exclusive content, connect directly with creators or unlock features. The Twitch Affiliates Program, for example, allows streamers to earn income when users subscribe to their channel. The subscriptions revenue stream is growing strongly across the online industry and within the VSP sector.
Donations and micro-transactions	Many VSP providers allow users to donate to the creators they enjoy and the platform usually receives a proportion of revenue in return. Donations can take the form of tipping or sending virtual gifts. Many VSPs have their own currency: **Twitch** users may send Cheer Bits; **Fruitlab** users can earn and send pips.
E-commerce transactions	VSPs have been developing shopping and ecommerce functionality. **Twitch**, under Amazon ownership, has been expanding this revenue stream since 2017.[19] **Snapchat**, since at least May 2021, allows any businesses to set up shoppable product catalogues and AR filters, and lets customers place orders with each business without leaving the Snapchat app.[20] **TikTok**'s e-commerce plans for livestream shopping have so far struggled to gain traction with UK users.[21]

VSP providers use similar business models to other online companies, with some VSPs using multiple models

- **Business to consumer model (B2C):** Subscription-based companies like OnlyFans[22] are examples of the B2C model. OnlyFans collects 20% of consumer subscription and donation payments before passing on the balance to content creators.
- **Business to business model (B2B):** Platforms such as Vimeo sell their product to other businesses. Seventy-one percent of fortune 500 companies have a paid subscription with Vimeo for their video sharing activity with another 18% having at least one free subscription.[23]
- **Business to business to consumer (B2B2C):** Any case when a consumer uses one business to order a product or service from the online store of another business is an example of a B2B2C model in action. TikTok For Business is a traditional B2B2C example, which allows companies to run and manage campaigns. Snapchat has been increasing B2B2C revenues.[24]

[19] Amazon-Owned Twitch Moves Deeper Into E-Commerce (medium.com), 27 February 2017.
[20] Snapchat is doubling down on commerce features (ModernRetail.co), 21 May 2021.
[21] Chinese-owned social media platform's foray into livestream shopping in the UK has struggled to gain traction (ft.com), 5 July 2022.
[22] Companies House, Annual Report to November 2021, page 23 revenue paragraph, 52% of revenues are subscriptions.
[23] Vimeo investor relations, Vimeo 2022 Annual Shareholder Letter (vimeo.com), February 2022.
[24] Why Snapchat Might Be Your Next B2B Marketing Tool (act-on.com), accessed 19 August 2022.

Publicly available transparency reports

Several platforms with video sharing functionality publish transparency reports to inform users about their safety approaches and how their community guidelines are enforced. Of the notified VSP providers, TikTok, Snapchat, Twitch, OnlyFans and BitChute currently publish transparency reports, each covering different metrics.

Figure 9: Analysis of notified VSP Transparency reports

Is the report easy to find?

- **All platforms'** transparency reports appear as the first result in Google search, using search term = "[platform name] transparency report".
- **All platforms** have their transparency reports on their website, a few clicks away from their home page (via website browser). Snapchat's report requires navigation to Snap's corporate website.

Can you compare data across different countries?

- **TikTok** provides data on the top 30 countries for video removals. This data does not include splits by type of harm.
- **Snapchat's** Transparency page provides data on 25 countries but contains up to 239 countries and territories in its CSV files. This data includes splits by type of harm.
- Other platforms show only aggregate data with no geographic splits, although **BitChute** has one harm category with a narrower geography of UK, EU, EEA & territories).

Is it easy to read and understand the data?

- **Data visualisation: Twitch** and **TikTok** provide the most visualisations in their report, where data might be presented in a chart or graphic**. BitChute** has some for its top-level metrics too.
- **Interactive data: TikTok's** charts are interactive, which means users can select and focus easier on the data they want to see. Some graphics can be toggled between chart and table view, meaning there are two different ways to view the same data.
- **Static data: Twitch's** charts are formatted as JPEGs and **BitChute's** report is a PDF, so the underlying data cannot be extracted for analysis. **Snapchat** and **BitChute's** data are in a table format.
- **Narrative: Twitch's** reports provide some narrative commentary about the data.

Best practice

- **Snapchat** and **TikTok** provide the underlying data in downloadable CSV files alongside the report.
- **TikTok's** CSVs include data from previous quarters as well, which makes it easier to compare over time.
- Some platforms publish additional data on specific activity, through blog posts. **TikTok** provides ad hoc data related to events such as the Ukraine crisis and Covid-19 pandemic. **Twitch** has reported on content such as hot tub streams.

Source: Ofcom analysis of publicly available transparency reports by notified VSP providers. The most recently published transparency reports by each VSP can be found here: BitChute, OnlyFans, Snapchat, TikTok and Twitch (and Twitch have also recently published a separate H1 2022 NetzDG report

Figure 10: Summary of metrics reported by VSP Transparency reports		TikTok Reports quarterly Latest report: Q2 2022	Snap Reports biannually Latest report: H2 2021	Twitch Reports biannually Latest report: H2 2021	OnlyFans Reports monthly Latest report: September 2022	BitChute Reports at least annually Latest report: Q2 2021-Q1-2022
Category of metric reported	**Example description**					
Flagging & reporting	E.g. Amount of content detected by user flagging vs by the VSP	No	Yes – User reports of content	Yes – User reports of content	No	Yes – User reports vs detected by VSP; validity of reports
Exposure	E.g. Views of / interaction with harmful content or behaviour	Yes – Removal rate before getting any views; fake engagement (i.e. fake likes removed)	Yes - Violative view rate	No	No	No
Splits by harm	E.g. Video removals by type of harm	Yes - 9 harms, and sub-policies	Yes - 10 harms	Yes - 5 harms	No	Yes - 9 prohibited harms plus additional categories
Content enforcement	E.g. Number of video removals	Yes - Video removals	Yes – Content enforced against and false information enforcements	Yes - Chat messages removed	Yes – Post removals and infringing post removals	Yes – Videos moderated; channels moderated
Account enforcement	E.g. Number of account closures	Yes - Account removals by reason, spam account removals, ad enforcement	Yes – Account deletions by type of harm	Yes – Timeouts, bans, enforcements, and large-scale enforcements	Yes – Accounts deactivated and creator accounts submitted, approved and rejected	Yes – Channels moderated
Appeals	E.g. Number of appeals from users about removed videos	No	No	No	No	Yes – Total vs valid appeals (not split by harm)
Restorations	E.g. Number of videos restored after being removed by VSP	Yes – Videos reinstated after appeal	No	No	No	No
Geography	E.g. Number of video removals in the UK vs globally	Global and some UK	Global and some UK	Global	Global	Global
Turnaround time	E.g. Time taken for VSP to remove a video after it has been reported	Yes – Removal rate within 24 hours.	Yes - Split by harm only (not by geography)	No	No	No

Source: Ofcom analysis of publicly available transparency reports published by the notified VSPs. BitChute's first report was released in June 2022. They have committed to publishing at least once a year, but the report itself includes quarterly splits. The 'exposure' category includes metrics equivalent or similar to those of other platforms (which are not notified VSPs) called, for example, 'prevalence', 'reach' or 'impressions'.

2. User experiences and attitudes

This chapter brings together Ofcom research sources to explore what users have told us about their experience of content they perceived to be harmful and their views on safety measures for VSP users. We feature findings from our new research which has been published alongside this publication. More information on our data can be found by following the links below.

Data sources referenced include:

- **Ofcom Online Experiences Tracker, 2021/22**, which explores user experiences across different types of online platforms, not exclusive to video-sharing platforms.
- **Ofcom VSP Tracker, 2021/22**, which focuses specifically on video-sharing platforms, including some notified VSP providers. In addition to users' experience of potentially harmful content, the survey explores their awareness and experiences of the safety measures in place on those platforms, and attitudes towards responsibility for protection of users. Content that users perceive to be harmful in this research does not necessarily map on to the content that users are required to be protected from under the VSP Framework.
- **Ofcom's VSP Parental Guidance Research, 2022**, which aims to understand how parents, guardians or carers with children aged 6-17 engage with guidance, measures and tools designed to keep their children safe online.
- **Ofcom's Adult Users' Attitudes to Age Verification on Adult Sites Research, 2022**, which aims to understand how adult internet users feel about verifying their age online in general and in the specific context of accessing pornographic content.

Note: Research findings reflect the views of our participants, rather than views of Ofcom.

Encountering potentially harmful content on video-sharing platforms

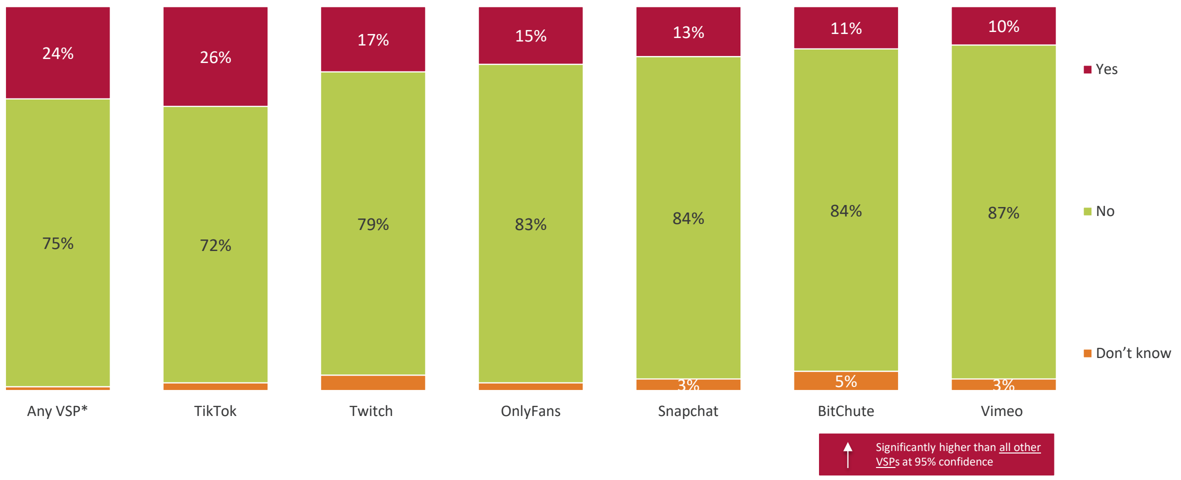
When it comes to encountering harm on video-sharing platforms, around a quarter of users said they came across potentially harmful content in the last three months

Of the platforms[25] asked about in our VSP Tracker survey, TikTok had the highest percentage of users saying they had come across videos which they considered to be violent, abusive or inappropriate on the platform in the last three months, at 26%,[26] followed by Twitch at 17%. This may be linked to the way TikTok's recommender algorithm presents users with content via the 'For You' page to determine what content the user sees, rather than the user actively choosing content to watch. Data

[25] Platforms included in the survey were: YouTube, TikTok, Facebook, Snapchat, Twitch, BitChute, OnlyFans, Vimeo, Fruitlab, Instagram. Platform names coloured pink denote they are a notified VSP provider.
[26] Ofcom VSP Tracker, Wave 2 (March '22). Q3a. In the last 3 months, have you come across any violent, abusive or inappropriate videos when using these sites or apps?

from our Online Experiences Tracker shows that those who experienced potential harms were most likely to encounter it scrolling through their feed, or on the 'For You' page (34%).[27]

Figure 1: Exposure to harmful content across Group A VSPs, according to users



Source: Ofcom VSP Tracker, Wave 2 (March 2022).

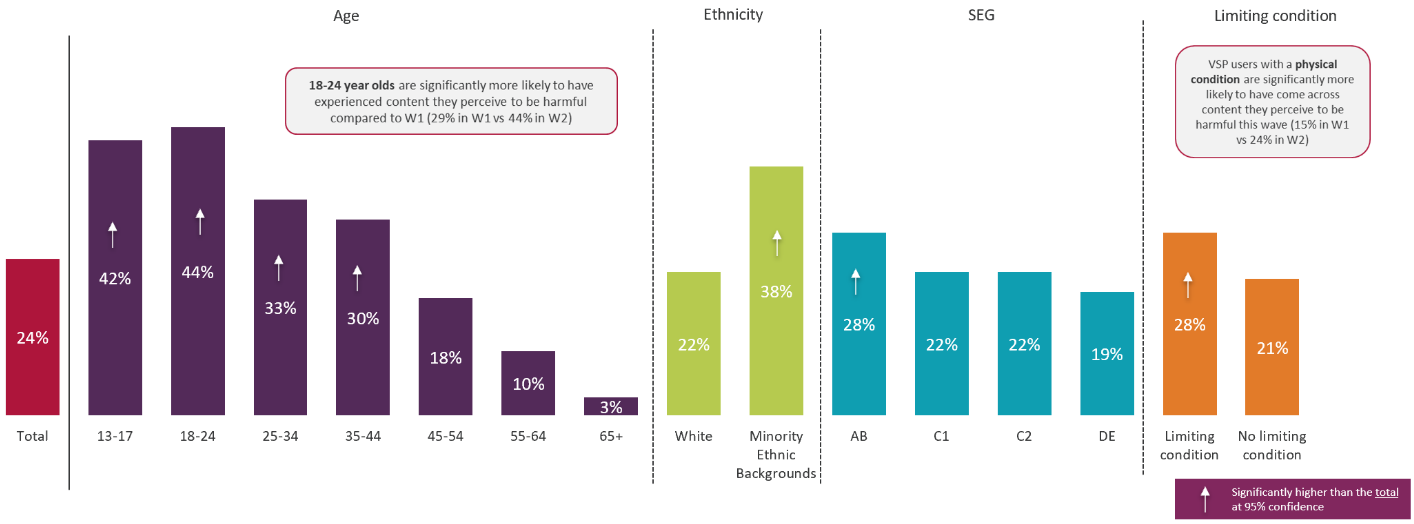
Q3a. In the last 3 months, have you come across any violent, abusive or inappropriate videos when using these sites or apps? *Any VSP includes data for all platforms included in the survey, not only those displayed on the chart. Platforms included in the survey were: YouTube, TikTok, Facebook, Snapchat, Twitch, BitChute, OnlyFans, Vimeo, Fruitlab, Instagram. Platform names coloured pink denote they are a notified VSP provider.

The percentage of users saying they have been exposed to content they perceived to be harmful also varies significantly by demographic

Younger VSP users, those from minority ethnic backgrounds, users from socioeconomic grade AB, and those with a limiting condition were all more likely than average to say they have encountered potentially harmful content on a VSP.

[27] Source: Ofcom Online Experiences Tracker Wave 2. Q21a. You said you experienced ..., how did you come across this? Base: All respondents experiencing any potential harm n=4,006; Male n=2,030; Female n=1,950.

Figure 2: Exposure to potentially harmful content across VSPs by demographic



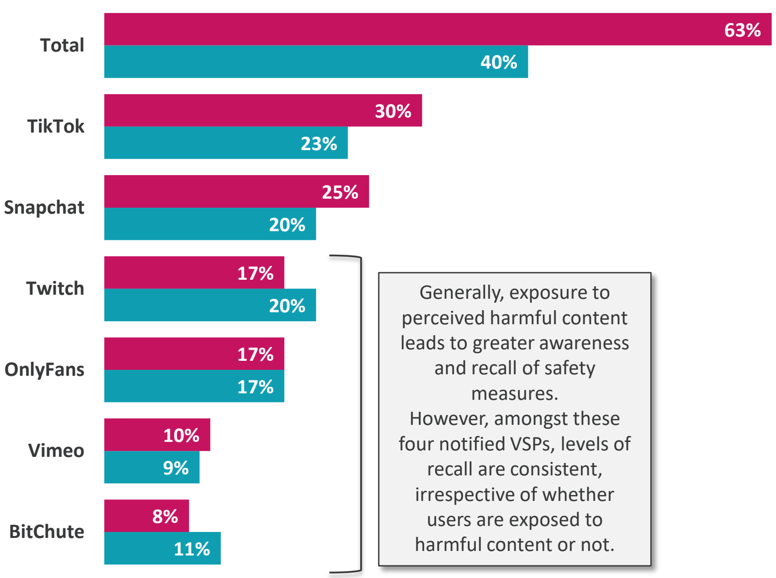
Source: VSP Tracker, Wave 1 (October 2021) & Wave 2 (March 2022).
Q3a. In the last 3 months, have you come across any violent, abusive or inappropriate videos when using these sites or apps?

Awareness of safety measures on VSPs

Four in ten users recalled seeing safety measures on any platform

It's perhaps not surprising that those who had said they had been exposed to what they perceived to be harmful content were more likely to remember seeing safety measures on specific VSPs than those who said they had not. Safety measures seen could include terms and conditions when signing up, rules which appear when uploading a piece of content, parental control settings or a 'report' button. Across all the VSPs included the survey, only four in ten users recalled seeing safety measures on any platform, but this increased to nearly two thirds among those who said they had been exposed to harmful content (63%).

Figure 3: Recall of safety measures seen in the last 3 months: Group A notified VSP providers

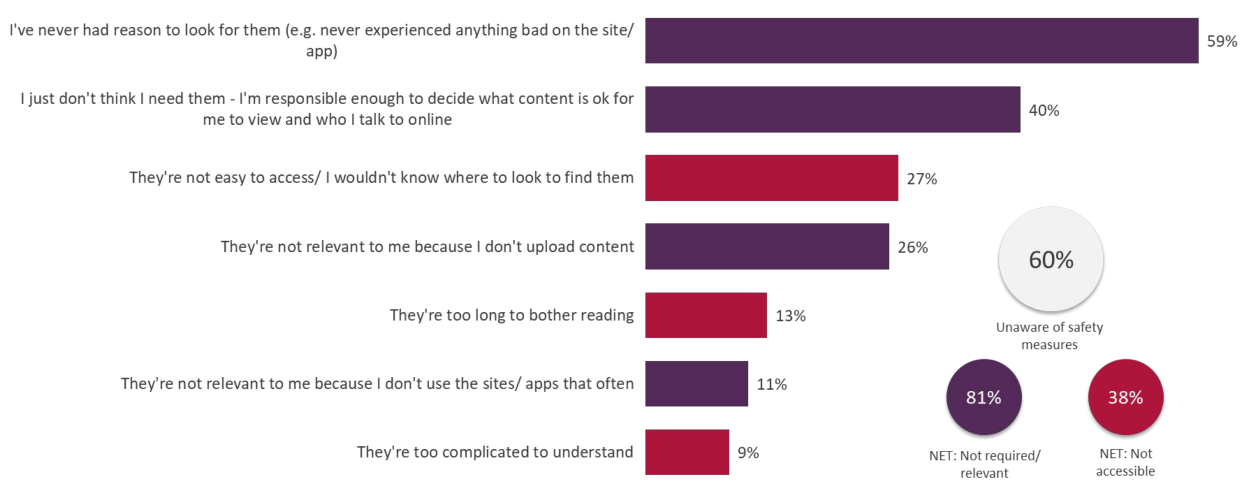


Source: VSP Tracker, Wave 2 (March 2022)
Q9. Please think about any rules or safety measures you may have come across when using these sites or apps in the last 3 months. This may include terms and conditions when signing up, rules which appear when uploading a piece of content, parental control settings or a 'report' button. For which of the following sites/ apps, if any, can you recall seeing such rules or safety measures? Base: All respondents, n=1,243; claimed exposure n=364. Note: Total figure includes data for all platforms included in the survey: not only those displayed on the chart. Platforms included in the survey were: YouTube, TikTok, Facebook, Snapchat, Twitch, BitChute, OnlyFans, Vimeo, Fruitlab, Instagram.

Of the six in ten VSP users who said they weren't aware of safety measures in place on any of the platforms, the majority said this was because they hadn't had a reason to look for them

This can be viewed as a positive indicator of a lack of exposure to content perceived to be harmful for these users. However, a significant minority (38%) also said that safety measures were not accessible or were too complicated to understand.

Figure 4: Reasons for lack of awareness of safety measures on VSPs

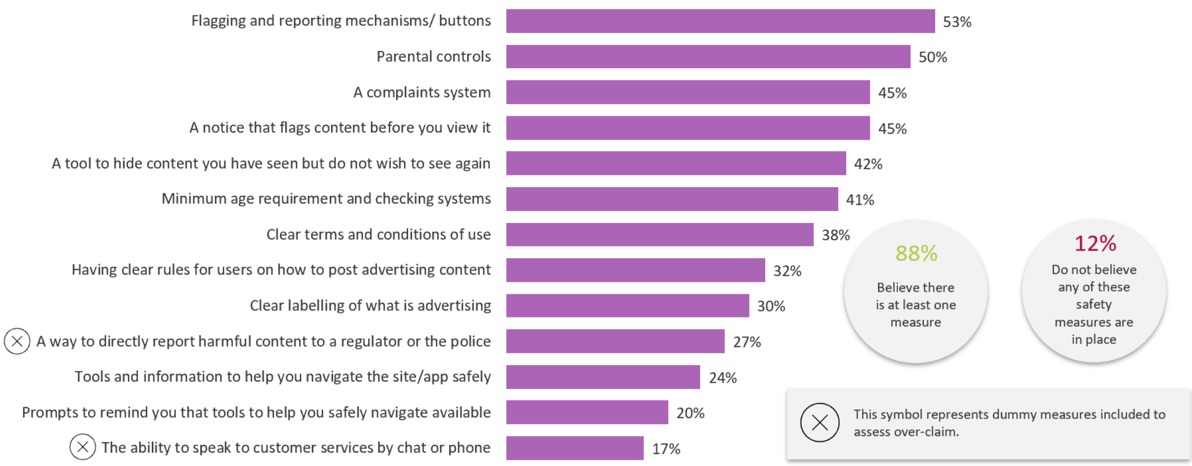


Source: VSP Tracker, Wave 1 (October 2021) & Wave 2 (March 2022). Q6. How much, if at all, are you aware of rules or safety measures put in place by the sites or apps we've been talking about to protect users from offensive, violent or *inappropriate videos or behaviour? Base: All respondents W1 n=1,259, W2 n=1,243 Q8. You said you are not very or not at all aware of rules or safety measures put in place by the sites or apps we've been talking about. Why do you think that is? Base: All who are not aware of rules or safety measures put in place by the sites or apps, Total W1, n=728, Total W2, n=673; NET: Not required / relevant W1, n=653, W2 n=602; NET: Not accessible W1, n=303, W2 n=281.*

At least half of video-sharing platform users thought flagging and reporting mechanisms were in place on the platforms

When prompted to choose from a list of options, the majority of video-sharing platform users (88%) thought that VSPs had at least one of the following safety measures in place. The two most popular measures were flagging and reporting mechanisms for content and parental controls, which at least half of users thought were in place. Just over one in ten users said they didn't think any of these safety measures were in place on VSPs, and a significant minority chose the dummy options which aren't present on any platform: 17% thought users could speak to customer services by chat or phone, and 27% thought users were able to report harmful content to a regulator or the police. This hints at a lack of awareness of the safety measures available on VSPs and what action users are able to take if they encounter potentially harmful content.

Figure 5: Perceived safety measures on VSPs



Source: Ofcom VSP Tracker 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=1,243.

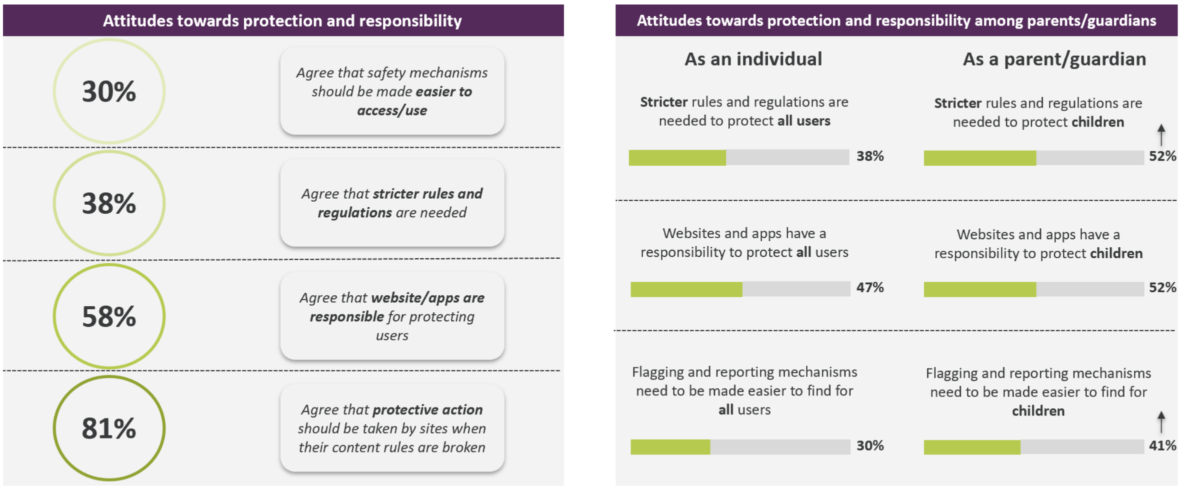
Attitudes towards protection of video-sharing platform users

The majority of video-sharing platform users believe it is the platform's responsibility to protect users

Among those surveyed, there wasn't a strong call for safety mechanisms to be made easier to use (3 in 10) or for stricter rules/regulations on VSPs (under 4 in 10). However, the majority of VSP users (58%) do believe that it is the website/app's responsibility to protect users, and that protective action should be taken by sites against inappropriate content (81% agree).

Parents and guardians are more likely to think that stricter rules or regulations are needed and that flagging and reporting mechanisms need to be easier to find when it comes to their children, compared to when thinking about VSPs generally (52% and 41% vs 38% and 30% respectively).

Figure 6: Summary of attitudes to responsibility for safety on video-sharing platforms



Source: VSP Tracker, Wave 2 (March 2022).

Q12 and Q12b. On a scale of 0-10, please indicate where your own view lies when it comes to rules or safety measures on these sites or apps. 0 means complete agreement with the statement on the left, 10 means complete agreement with the statement on the right, and 5 means you don't agree with either of the statements. Base: All respondents W2 n=1,243. Q15. Imagine a user posted a video to a site or app that the site or app feels is breaking their rules on appropriate content. As a result, the post is either removed, hidden or made harder to find. To what extent do you agree or disagree the site/ app should have taken any action at all? Base: All respondents W2 n=1,243.

QP1. We would like you to answer the next question specifically with your role as a parent or guardian in mind. On a scale of 0-10, please indicate where your view lies when it comes to rules or safety measures for your children on these sites or apps. Base: Parents and guardians of children n=349.

Parents' and Carers' attitudes

The perceived nature of video-sharing platforms triggers concerns in parents, as they believe it allows access to content they perceive to be inappropriate and strangers online

Ofcom's VSP Parental Guidance qualitative research found that parents tended to perceive VSPs generally as having a constant and unregulated stream of content.[28] Parents believed VSPs allow access to any number of online communities, thus increasing the possibility of interacting with strangers. Additionally, there was concern among respondents that their child could come across inappropriate content that may contain violent and suicidal subjects, pornographic content, or content relating to unrealistic body image.

Based on their current understanding and the information available to them, six in ten (58%) parents say they do not use parental controls on the VSPs that their child uses

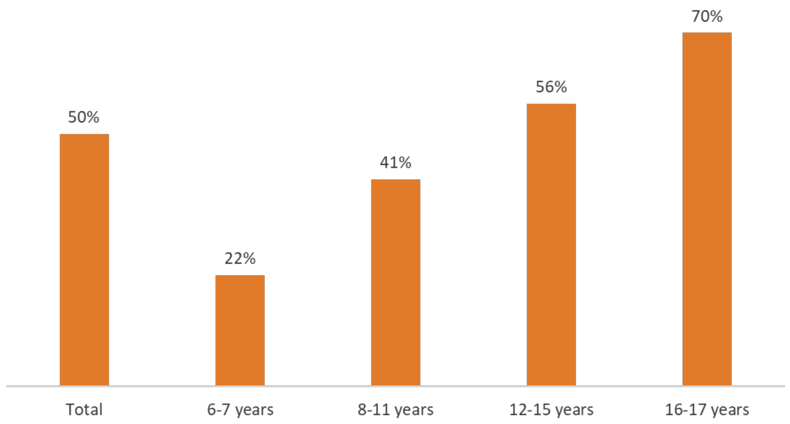
In the VSP Parental Guidance research quantitative survey, half of parents who were not using parental controls said that this was because their child 'does not need them'. This attitude strengthened with the age of the child, reaching 70% of parents with 16-17-year-olds who felt that their child does not need parental controls (see Figure 7). Twenty per cent of parents who did not

[28] The following notified VSP providers were asked about in this research: TikTok, Snapchat, Twitch, Recast, Fruitlab, Vimeo and The Sponsor Hub. However, in the qualitative interviews parents were talking more broadly about any video-sharing platform they believed their child could use.

have controls on the VSPs that their child uses said that they didn't know how to apply parental controls or settings, and 17% said they didn't know how they work.

During the qualitative research, the most frequently cited reasons by parents for not tending to use parental controls were that they monitor their children's usage themselves, they trust their children, and also that they feel their children are savvy enough to take care of themselves online.

Figure 7: Proportion of parents that feel their child does not need parental controls on the VSPs their child uses



Source: VSP Parental Guidance Research

Q13. Why do you not use these sort of controls or settings for your [Child selected]? Q11. And, thinking about your [Child selected], which, if any, do you currently use or have you used in the past for this child?

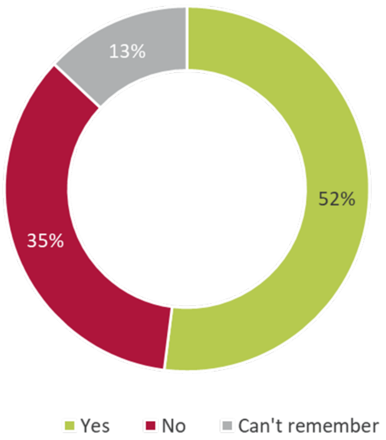
Base: All respondents not using parental controls on apps (465); Children 6-7 (45) *CAUTION – Low base size, figures are indicative only, 8-11 (133); 12-15 (178); 16-27 (109)*

Just over half of parents (52%) remember seeing/receiving guidance on how to keep their child safe online.

Almost half of parents (46%) said they received guidance from their child's school, a fifth (20%) looked for it via a search engine, and under a fifth (16%) encountered it while on social media. However, our qualitative research suggests that the process of finding information themselves on internet safety was overwhelming for many parents, and often only prompted by a specific incident.[29] Parents felt that there is no single go-to source for information; instead, they tended to gather information from multiple sources, with institutions such as schools, charities or government websites being the most trusted.

[29] Examples include school sending online info regarding internet safety, discover child is looking at inappropriate content and child asking if they can have a new app.

Figure 8: Proportion of parents who have received guidance on keeping their child safe online



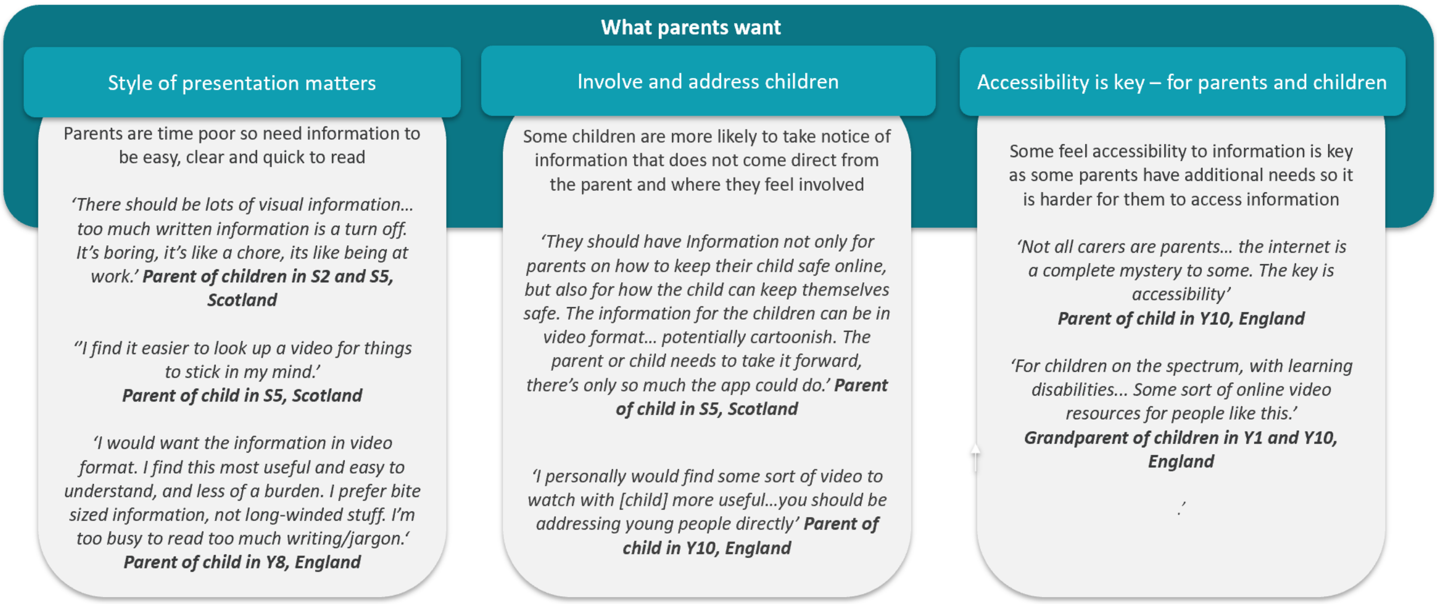
Source: VSP Parental Guidance Research

Q21. Have you seen or received information or guidance about keeping your child safe online from any of the following sources? Base: All respondents (1,013).

Parents are appreciative of internet safety guidance from VSPs that is clear, relevant, accessible, and easy to understand

In our qualitative research, parents were provided with examples of existing online safety guidance from three notified VSP providers, Snapchat, Twitch and TikTok. Parents responded well to examples of short videos and a simple layout, which made the information more digestible and quicker to read as they are often time poor.

Figure 9: Ideal communications that parents want from VSPs



Source: VSP Parental Guidance Research – qualitative.

Adult users’ attitudes to age verification (AV) on adult sites

There is broad support, from adult users we surveyed, for AV measures to prevent under-18s from accessing online pornography. Further, our research found that:

AV measures are accepted where they are expected. For example, participants said that they accept the requirement to verify their age whilst purchasing alcohol online or participating in online gambling.

There is greater willingness to verify age to access pornography if creating an account or subscribing to a creator to access content. Using a credit card is the preferred means of AV for paid access to pornography.

Participants have serious concerns about how user data may be processed and/or stored during AV processes to access pornography. This is reflective of a very low level of trust in the data privacy practices of adult sites.

Privacy concerns could be addressed by increased transparency about how user data would be used, stored, and deleted; a choice of methods to verify age; and potentially independent third-party providers performing the age check, rather than the porn sites themselves.

You can find more information by reading Ofcom’s Adult Users’ Attitudes to Age Verification on Adult Sites research.