VSP Tracker Waves 1 + 2
Chart Pack

Produced by: Yonder Consulting

Fieldwork: October 2021 (W1); March 2022 (W2)

Background, Scope and Objectives

Understanding video-sharing platforms (VSPs)

The core objective of this quantitative study is to understand and track VSP users' awareness, perceptions and experiences of the safety measures and tools available on VSPs, within the broader context of their usage of VSPs.

This study focusses on the following VSPs: **YouTube, Instagram, TikTok, Facebook, Snapchat, Twitch, Vimeo, Fruitlab, Bitchute** and **OnlyFans. It is important to note that only some of these currently fall within the scope of the VSP regime. For example, YouTube, Facebook and Instagram are currently not regulated as notified VSPs by Ofcom.**

The VSPs included in the list above were the main focus of the questionnaire across the two waves being reported here, as they were believed to be the most popular VSPs at the time. We also collected some data on Triller, Recast, Vuepay, UK Babes Channel Video, Xpanded.com, TV girls plaza, Fanzworld, Pocketstars and admire.me. Triller (September 2022), VuePay (April 2022), UK Babe Channels and TV Girls Plaza (March 2022) are no longer a notified VSP as they have either closed down or no longer include a video-sharing element to their service.
The scope of the research is broader than the measures and harms defined in the VSP Regime, but will still provide context to our understanding of users' experiences on online platforms. The research covers:

1. Usage of VSPs
2. Experience of perceived harmful content on VSPs, including likelihood to come across this content in the future and how protected users feel when using these sites/apps
3. Awareness and recall of safety measures, including reasons for lack of awareness amongst those who are not aware of these measure
4. Usage of safety measures such as reporting/flagging mechanisms
5. Attitudes towards protection, responsibility, and protective action on VSPs, including the implementation of safety measures and how long a VSP should have to resolve any breaches of its rules

The information included in this report represents the views of the sample interviewed rather than Ofcom's own views.

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Methodology

Sample

- Sample based on 1,000 nationally representative internet users aged 13-84, with quotas set on gender, age, socio-economic group and region.
- An additional boost of c.100 VSP users to ensure base size sufficient for robust analysis.
- Boosts applied to the following VSPs: TikTok, Twitch, Vimeo, Snapchat, OnlyFans, BitChute, Triller, Fruitlab, Recast, Vuepay, Xpanded.com, TV Girls Plaza, UK Babe Channels Video, Fanzworld, PocketStars, AdmireMe.VIP

Data collection

- Online survey interviews conducted amongst Ofcom's Online Research Panel.
- 2 waves of fieldwork were completed (we reference the data as Wave 1 and Wave 2 throughout this pack) .
- Fieldwork conducted by Yonder from 22nd of September – 4th October 2021 for Wave 1 and 18th March – 4th April 2022 for Wave 2
- Fieldwork completed with a sample of 1,259 VSP users in Wave 1, and 1,243 users in Wave 2.

Data reporting

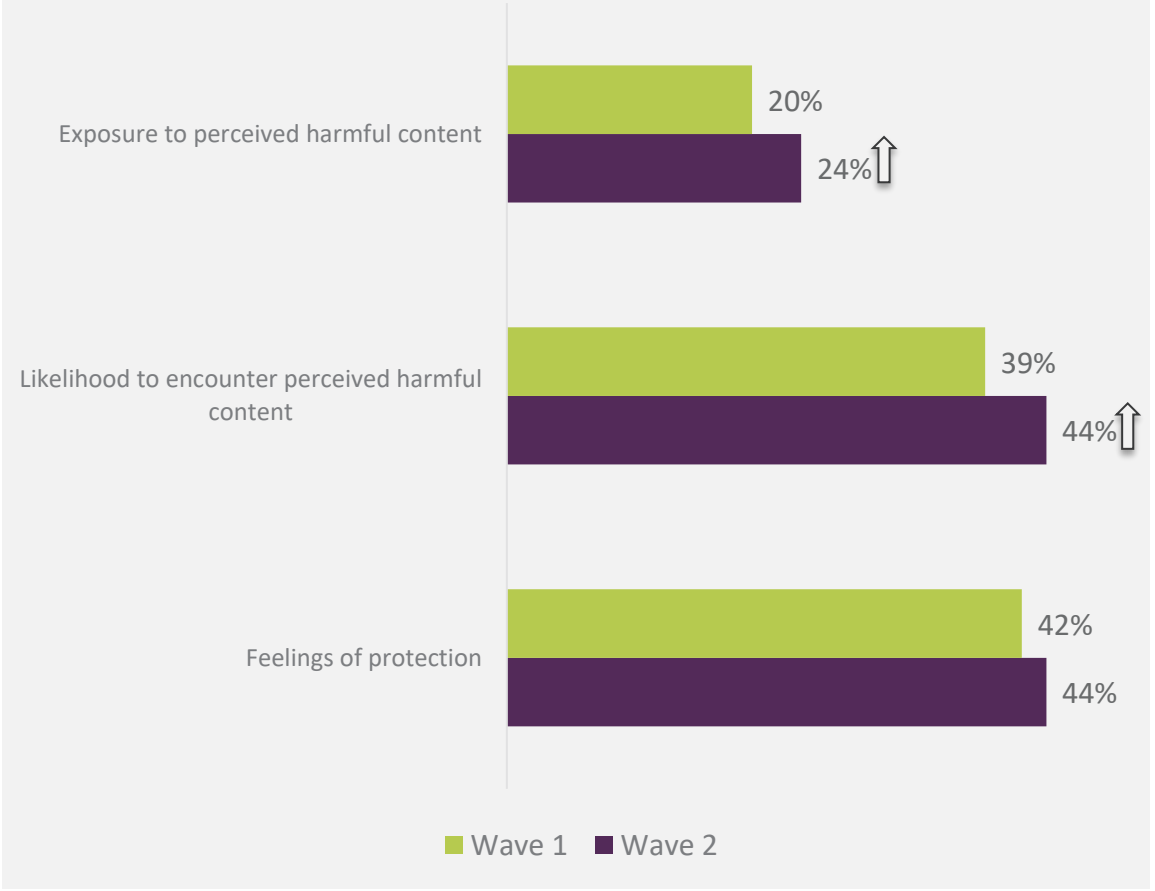
- Data weighted to be representative of those who go online in the UK based on age, gender, region, social grade, time spent online, and VSP usage.
- Weighting for VSP usage based on the fallout from the nationally representative sample to get a nationally representative view of VSP users.
- Significance testing applied at the 95% confidence level to identify differences between subgroups.

Summary of key findings (1)

- Nearly a quarter of VSP users have come across video-content they perceive to be harmful on a VSP in Wave 2, a significant increase since Wave 1. In line with this increase, VSP users are also more likely to think they will encounter video-content they perceive to be harmful on a VSP in the future, although how protected they feel on VSPs remains consistent between waves.
- Awareness of safety measures in Wave 2 is consistent with Wave 1; 3 in 5 remain unaware of safety measures, primarily because they say they have never needed to use them. Usage of flagging/reporting mechanisms (amongst those aware of these measures) is also relatively low (4 in 10), with over one in ten saying these are difficult find.

White arrows denote significant shifts since Wave 1

Experience of perceived harmful video-content on any VSP



Awareness of safety measures

60%

Unaware of safety measures

N.B. No significant shifts between Waves 1 & 2 at an overall level.

81% NET: Safety measures are not required/ relevant

38% NET: Safety measures are not accessible

Usage of safety measures (amongst those aware)

39%

Have **ever** used flagging and reporting mechanisms

N.B. No significant shifts between Waves 1 & 2 at an overall level.

13% NET: Safety measures are difficult to find

Summary of key findings (2)

- In Wave 2 there isn'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 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.
- Parents/guardians are more likely to think stricter rules/regulations are needed and that flagging/reporting mechanisms need to be easier to find when it comes to their children, compared to when thinking about themselves. However, they believe that websites/apps have a responsibility to protect both children and other users.

Ofcom
making communications work for everyone

↕ Significantly higher than answer as individual at 95% confidence

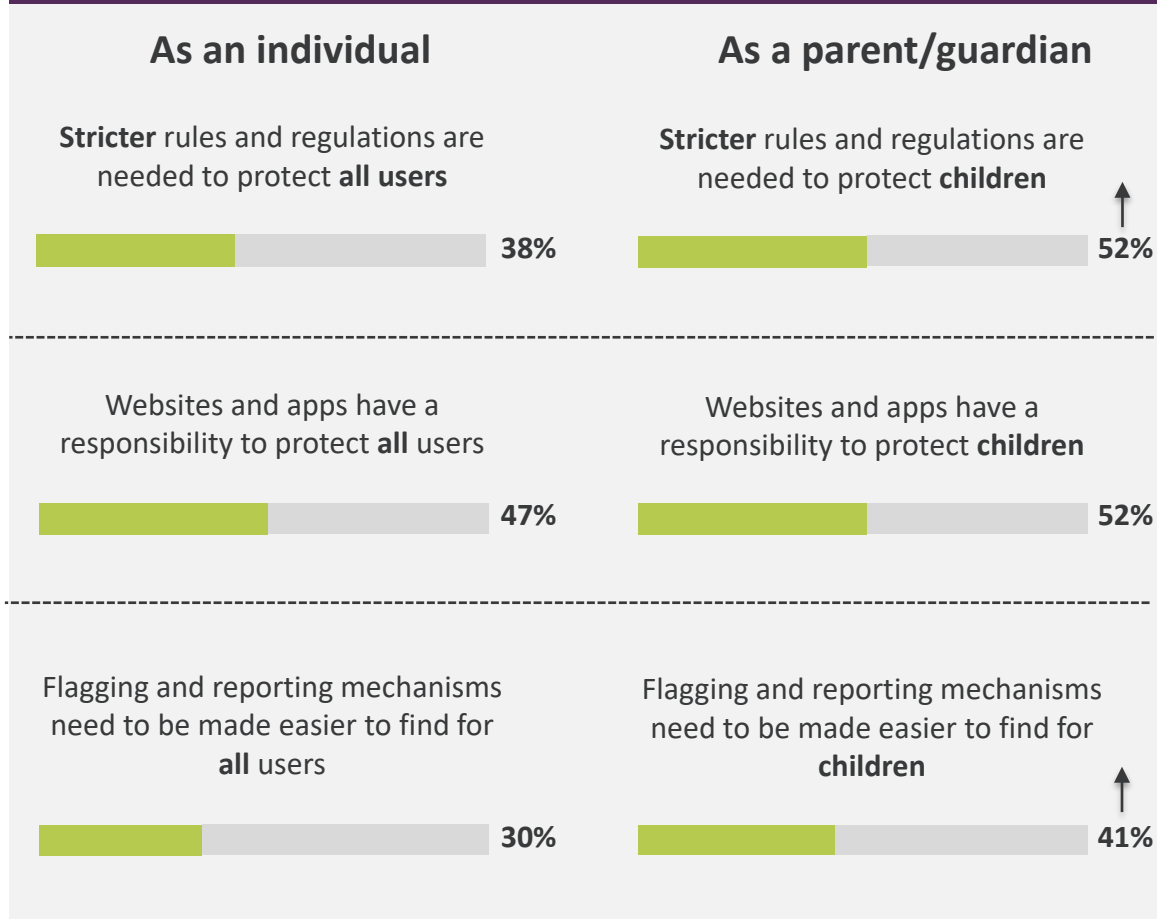
* The below were new questions in Wave 2 and as such there is no historical data to which to compare.

Attitudes towards protection and responsibility

30%	*Agree that safety mechanisms should be made **easier to access/use***
38%	*Agree that **stricter rules and regulations** are needed*
58%	*Agree that **website/apps are responsible** for protecting users*
81%	*Agree that **protective action** should be taken by sites when their content rules are broken*

N.B. No significant shifts between Waves 1 & 2 at an overall level.

Attitudes towards protection and responsibility among parents/guardians*



Section 1
Usage of VSPs

Key findings, Wave 2 vs. Wave 1

1

***Facebook is the most frequently used** VSP (41% use several times daily), while **YouTube is the most used** VSP overall (95% have used at least once in the last year)**.**

2

Usage of the VSPs is largely in line with Wave 1 with the exception of Fruitlab, usage of which has decreased (from 7% to 4%). However, usage of the **adult VSPs has decreased**, especially UK Babe Channels Video* (from 6% to 4%) and Xpanded.com (from 5% to 3%).

*UK Babe Channels Video has gone offline, which could explain the decrease in usage since last wave

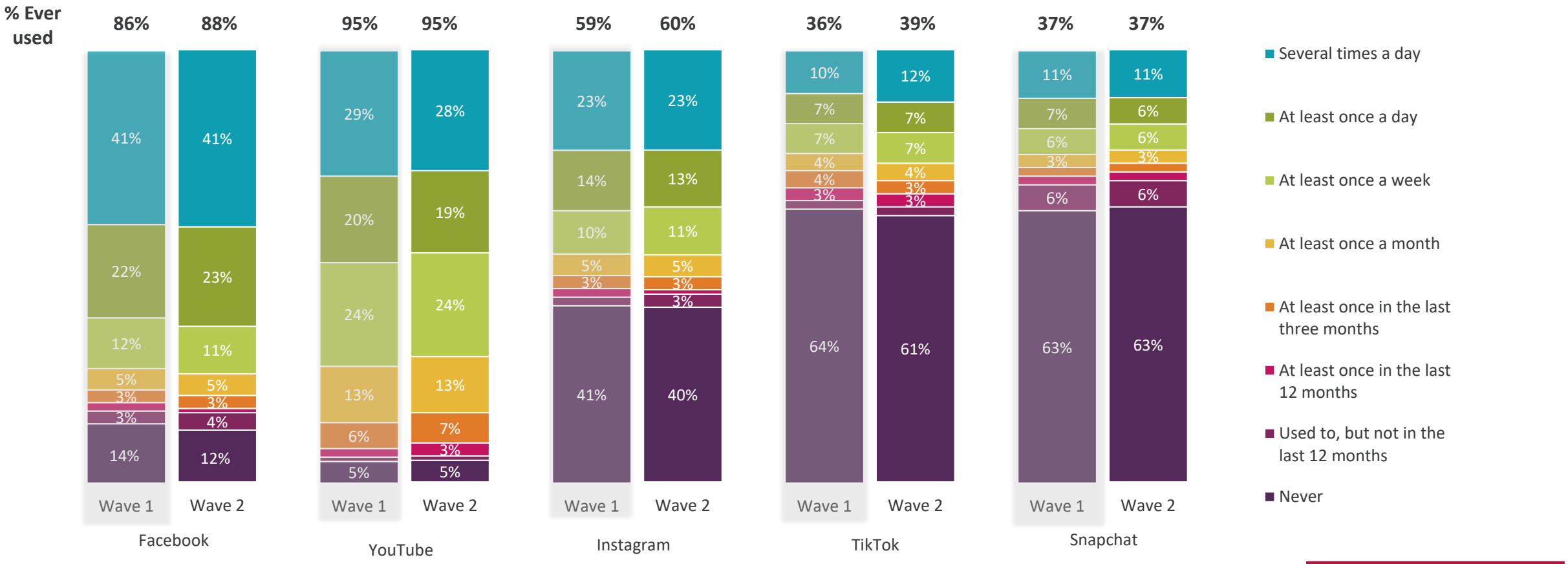
3

The majority of VSP users **continue to use more than one VSP,** with each using around **3 VSPs on average.** Compared to Wave 1, Bitchute users are using significantly fewer VSPs on average (from 12 to 9).

*This study focusses on the following VSPs: YouTube, Instagram, TikTok, Facebook, Snapchat, Twitch, Vimeo, Fruitlab, Bitchute and OnlyFans. It is important to note that only some of these currently fall within the scope of the VSP regime. For example, YouTube, Facebook and Instagram are currently not regulated.

YouTube is the most used VSP overall, while Facebook is the most frequently used VSP; usage of VSPs has remained consistent since the previous wave in October 2021

Use of VSPs by frequency (Wave 1 vs Wave 2) – pt. 1



No significant shifts since Wave 1

Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

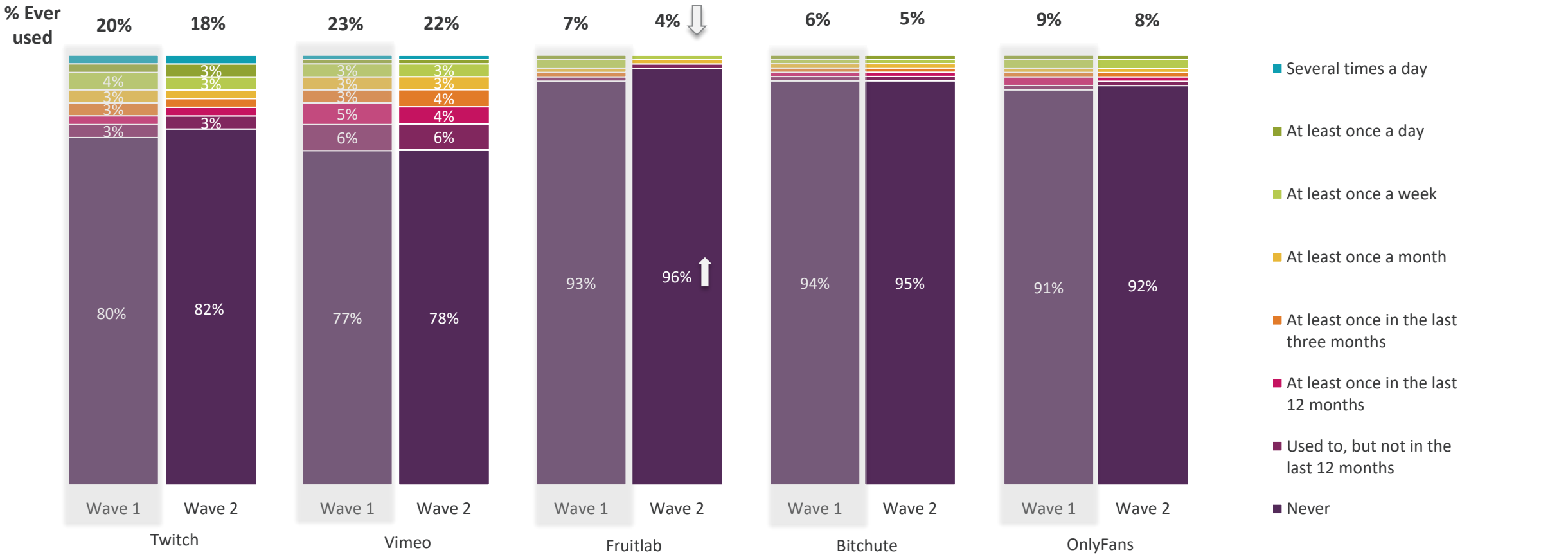
Q1. How frequently do you use or visit any of the following sites or apps that host user-generated videos (i.e. people sharing videos online)? This includes watching videos, uploading videos, commenting on videos or sending private messages on these sites or apps using any device.

Base: All respondents W1 n=1,259; W2 n=1,243

Labels shown >2%.

Usage of Fruitlab has decreased since the last wave; no significant shifts are observed in usage of any other VSP on this slide

Use of VSPs by frequency (Wave 1 vs Wave 2) – pt. 2



Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

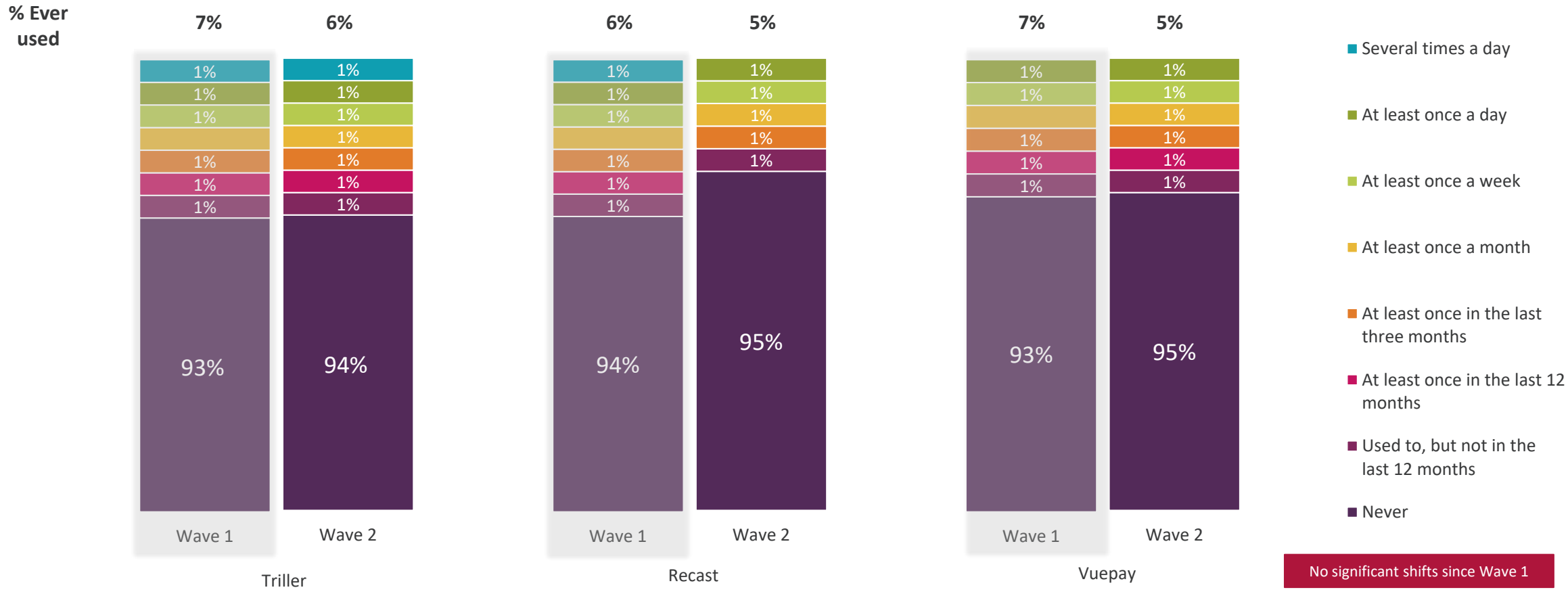
Q1. How frequently do you use or visit any of the following sites or apps that host user-generated videos (i.e. people sharing videos online)? This includes watching videos, uploading videos, commenting on videos or sending private messages on these sites or apps using any device.

Base: All respondents W1 n=1,259; W2 n=1,243, All adult (18+) respondents W1 n=1,141; W2 n=1,143

Labels shown >2%

Usage of the VSPs on this slide continue to be consistently low, with less than one in ten using Triller, Recast and Vuepay

Use of VSPs by frequency (Wave 1 vs Wave 2) – pt. 3



Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

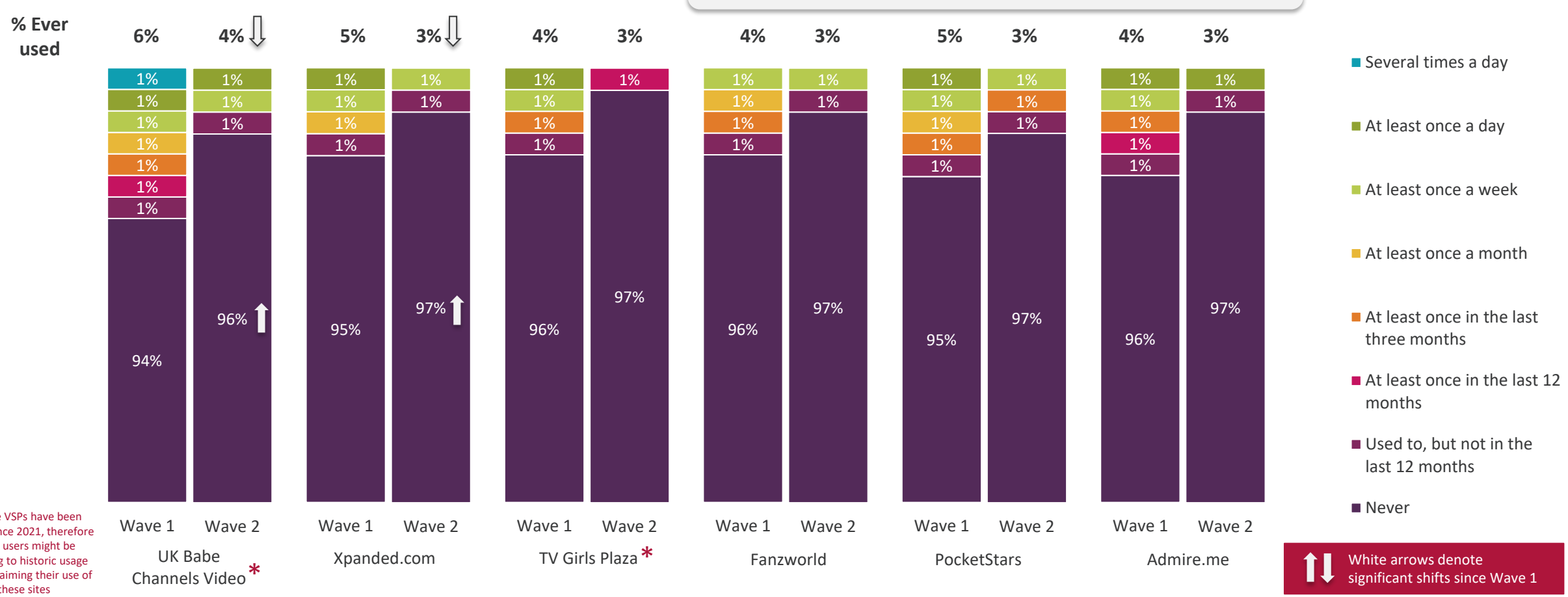
Q1. How frequently do you use or visit any of the following sites or apps that host user-generated videos (i.e. people sharing videos online)? This includes watching videos, uploading videos, commenting on videos or sending private messages on these sites or apps using any device.

Base: All respondents W1 n=1,259; W2 n=1,243

Usage of adult VSPs has decreased wave on wave; this decrease is largely driven by Xpanded.com and UK Babe Channels video (which have been offline since 2021)

Use of VSPs by frequency (Wave 1 vs Wave 2) – pt. 4

NET: Adult VSPs used in the last 3 months = 7% W1 vs 4% W2 ⇩



*These VSPs have been offline since 2021, therefore these users might be referring to historic usage or overclaiming their use of these sites

⇅ White arrows denote significant shifts since Wave 1

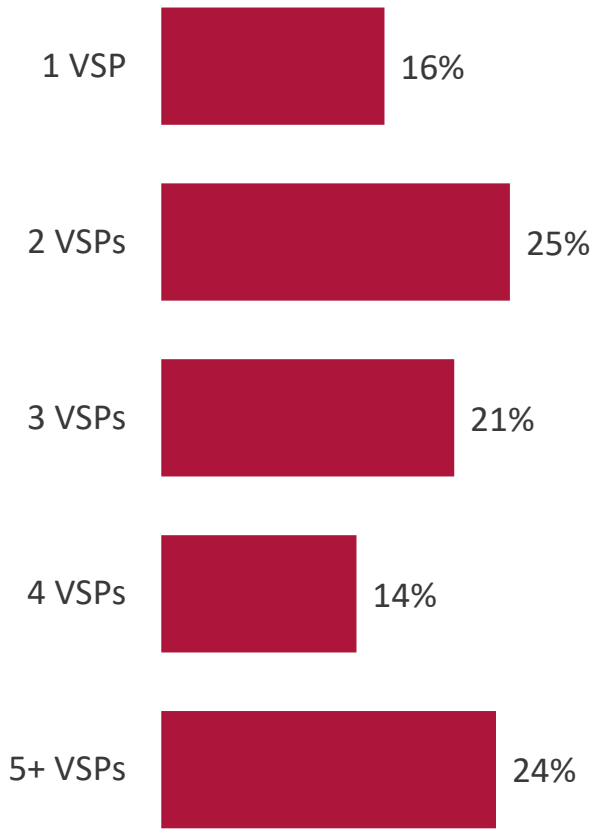
Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

Q1. How frequently do you use or visit any of the following sites or apps that host user-generated videos (i.e. people sharing videos online)? This includes watching videos, uploading videos, commenting on videos or sending private messages on these sites or apps using any device.

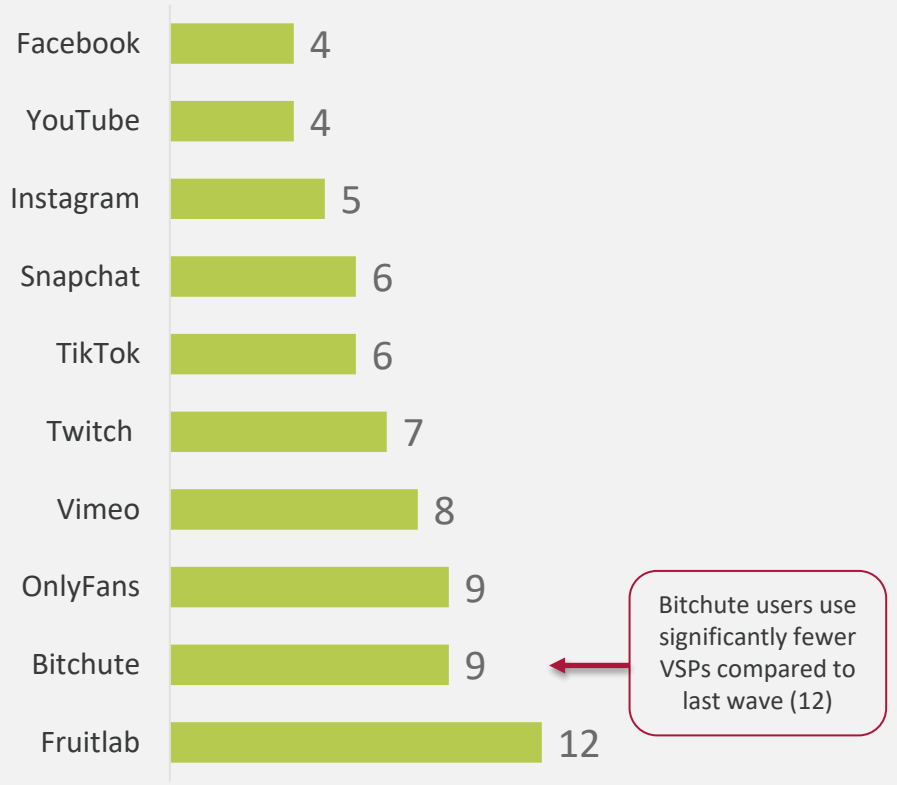
Base: All respondents W1 n=1,259; W2 n=1,243, All adult (18+) respondents W1 n=1,141; W2 n=1,143

Wave 2 VSP usage is similar to Wave 1 with the majority using more than 1 VSP

Number of VSPs used in the last 3 months



Avg. no of VSPs used by users of popular VSPs*



Source: VSP tracker Wave 2 (March '22)

Q1. How frequently do you use or visit any of the following sites or apps that host user-generated videos (i.e. people sharing videos online)? This includes watching videos, uploading videos, commenting on videos or sending private messages on these sites or apps using any device.

Base: All respondents W2 n=1,243, All adult respondents (18+) W2 n=1,143; Regular users of: W2 Facebook n=1,043, W2 YouTube n=1,141, W2 Instagram n=760, W2 Snapchat n=449, W2 TikTok n=522, W2 Twitch n=255, W2 Vimeo n=263, W2 Onlyfans n=179, W2 Bitchute n= 119, W2 Fruitlab n=111

Section 2
Experience of perceived harmful content on VSPs

Key findings - Wave 2 vs. Wave 1

1

Exposure to content perceived as harmful* in the last three months has increased significantly wave on wave, from 20% in October 2021 to 24% in March 2022. This is largely driven by increased perception of exposure on **Twitch (from 10% in October 2021 to 17% in March 2022)** and **Facebook (from 14% in October 2021 to 18% in March 2022),** although users continue to be most likely to come across perceived harmful content on **TikTok (24% in October 2021 to 26% in March 2022)**.

2

Over four in ten (44%) expect to come across perceived harmful content in the future. This represents an increase from Wave 1 to Wave 2 (39% to 44%) in line with increased exposure to perceived harmful content. **TikTok users (51%)** expect to come across content perceived to be harmful on the platform more than users of other VSPs.

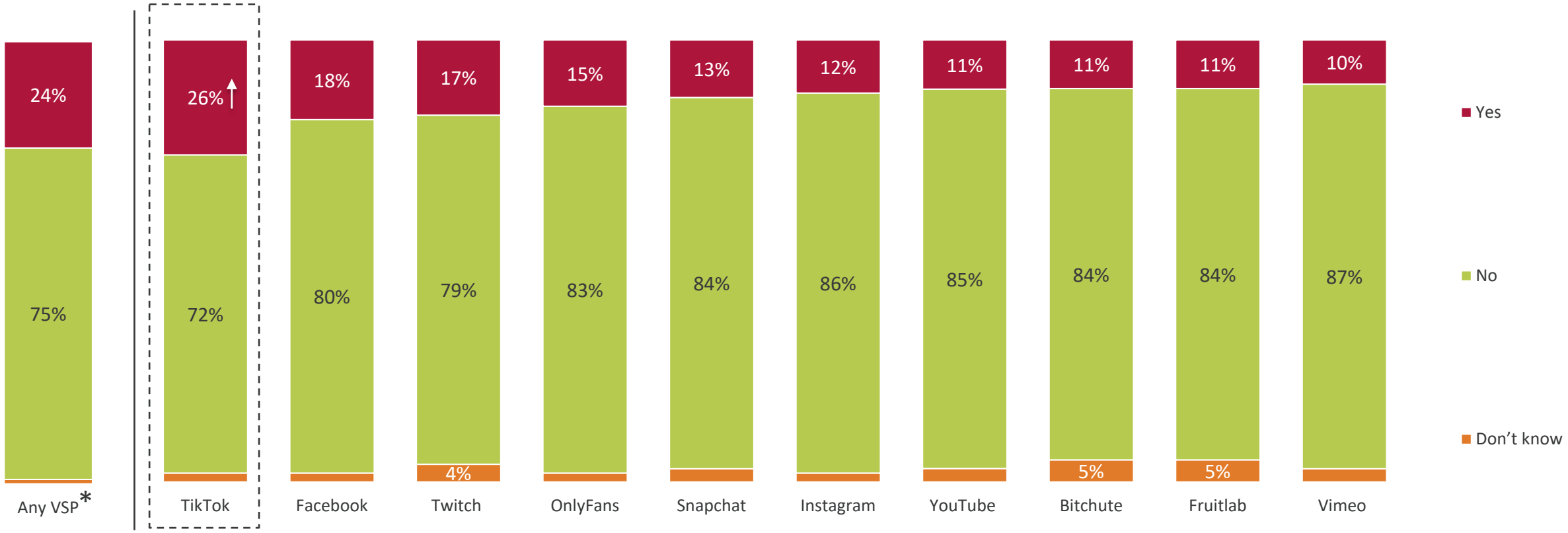
3

Despite increased exposure to content respondents perceive as harmful on some VSPs, **feelings of protection remain consistent** between waves (92% feel 'at least somewhat protected'); users feel largely protected on VSPs, although **TikTok (18%)** and **OnlyFans (19%)** users are most likely to feel unprotected.

*The relevant survey question reads: '*In the last 3 months, have you come across any violent, abusive or inappropriate videos when using these sites or apps?*'

Around a quarter of users have come across content they perceived to be harmful in the last 3 months; TikTok users are most likely to claim to have encountered videos they perceived to be violent, abusive, or inappropriate

Exposure to perceived harmful content



* If a respondent says they had come across content they perceive to be harmful on any VSP, they are classified as 'yes' under 'Any VSP'

↑ Significantly higher than all other VSPs at 95% confidence

Source: VSP tracker Wave 2 (March '22)

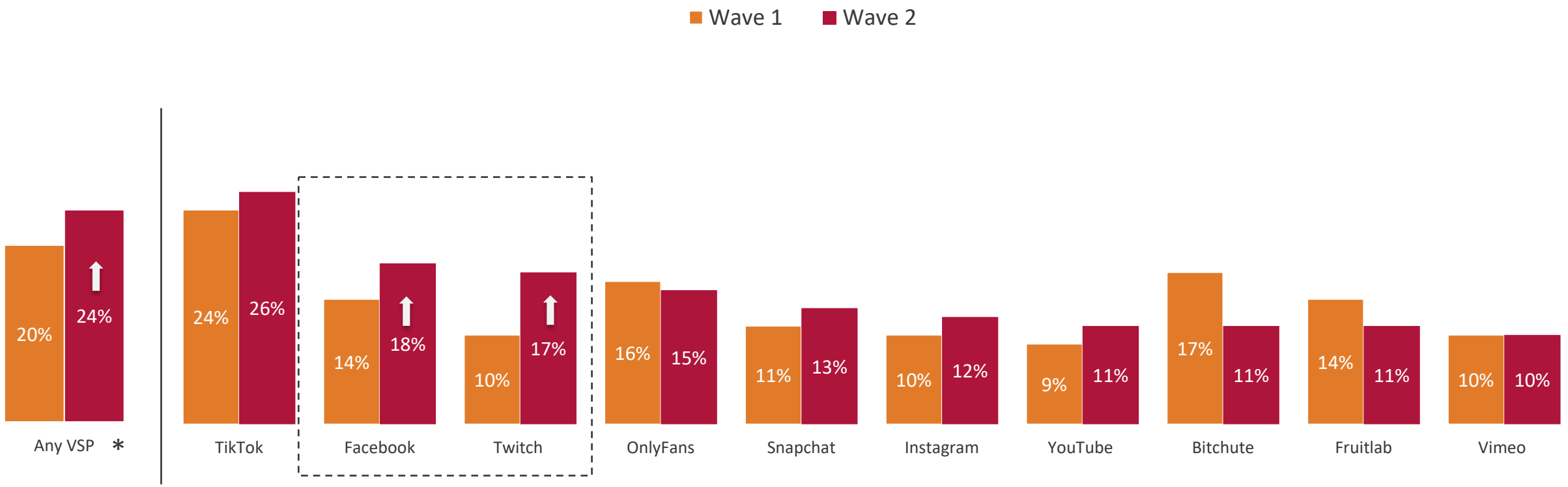
Q3a. In the last 3 months, have you come across any violent, abusive or inappropriate videos when using these sites or apps?

Base: All who have used VSP in the last three months n=1,243, Youtube W2 n=1141; Instagram W2 n=760; TikTok: W2 n=522; Facebook: W2 n=1,043; Snapchat: W2 n=449; Twitch: W2 n=255; Bitchute: W2 n=119; OnlyFans: W2 n=179; Vimeo: W2 n=263; Fruitlab: W2 n=111

Labels shown >3%

Exposure to content respondents perceive to be harmful has increased significantly since Wave 1; this is largely driven by increased perception of exposure on Facebook and Twitch

Exposure to perceived harmful content: (Wave 1 vs Wave 2) – Respondents saying 'yes'



White arrows denote significant shifts since Wave 1

* If a respondent says they had come across content they perceive to be harmful on any VSP, they are classified as 'yes' under 'Any VSP'

Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

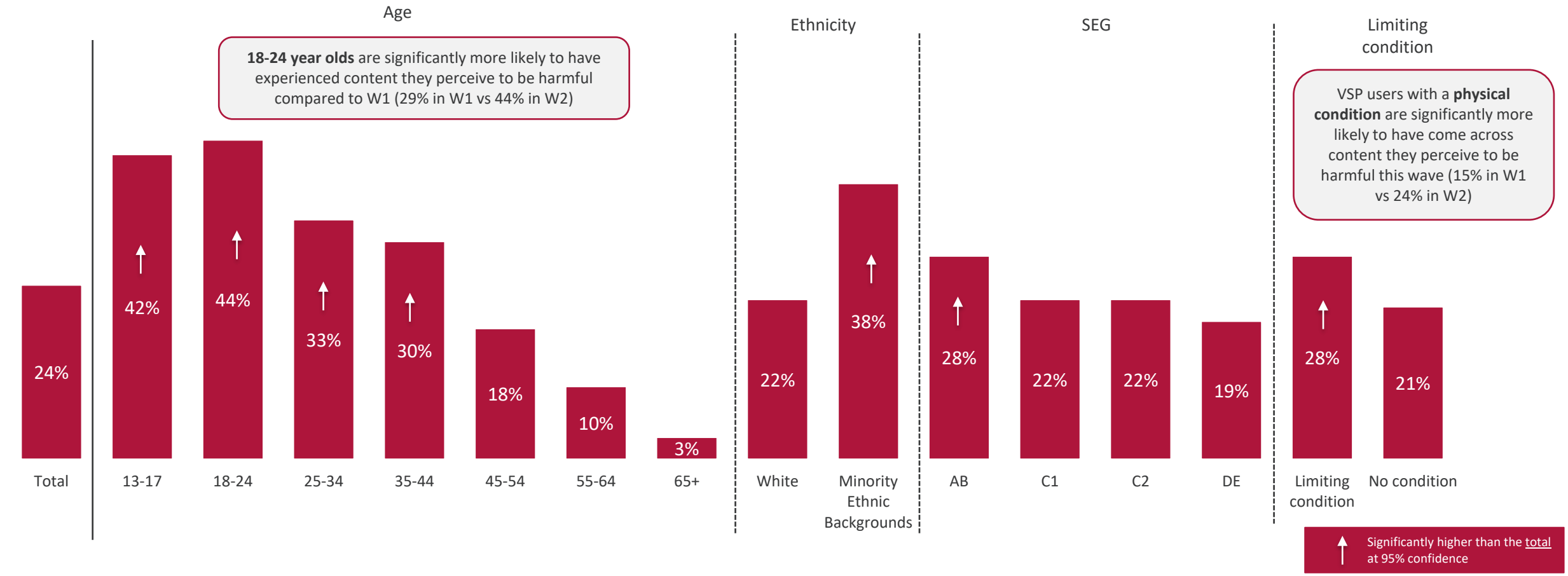
Q3a. In the last 3 months, have you come across any violent, abusive or inappropriate videos when using these sites or apps?

Base: All who have used VSP in the last three months W1 n=1,259, W2 n=1,243, YouTube: W1 n=1,175, W2 n=1141; Instagram: W1 n=794, W2 n=760; TikTok: W1 n=516, W2 n=522; Facebook: W1 n=1,055, W2 n=1,043; Snapchat: W1 n=471,W2 n=449; Twitch: W1 n=297, W2 n=255; Bitchute: W1 n=131, n=119; OnlyFans: W1 n=198, W2 n=179; Vimeo:W1 n=268, W2 n=263; Fruitlab: W1 n=130; W2 n=111

Labels shown >3%

Younger VSP users, those from minority ethnic backgrounds, users from SEG AB, and those with a limiting condition, are more likely to have experienced content they perceive to be harmful on a VSP

Exposure to perceived harmful content: Any VSP – Respondents saying 'yes'



Source: VSP tracker Wave 2 (March '22)

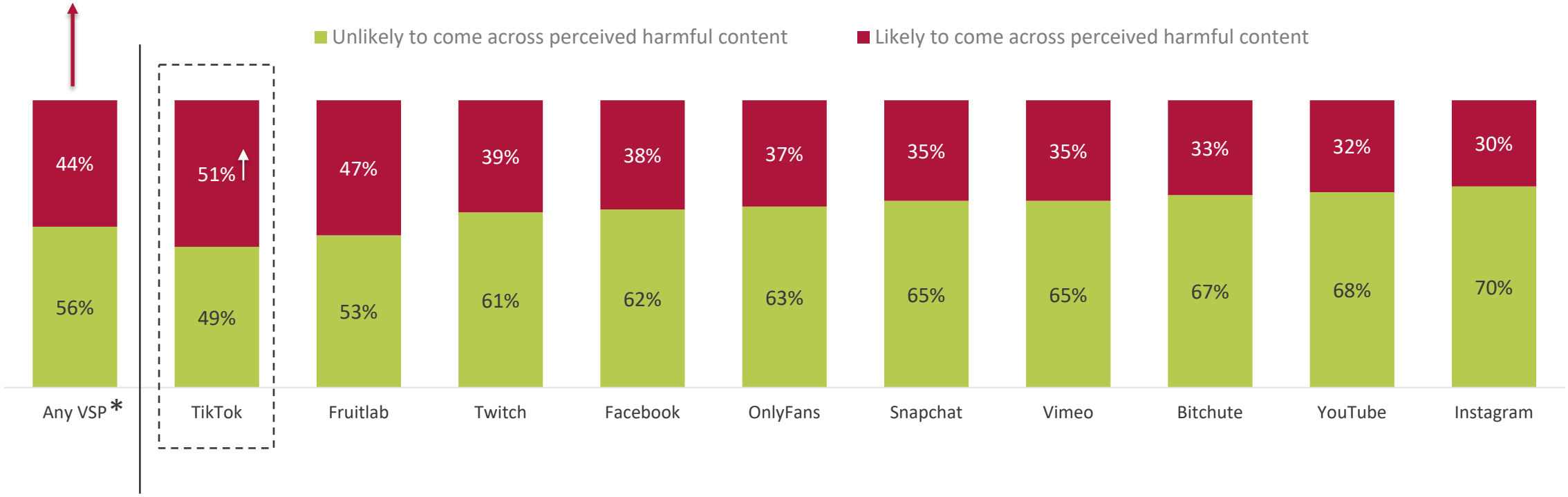
Q3a. In the last 3 months, have you come across any violent, abusive or inappropriate videos when using these sites or apps?

Base: all, n=1,243; 13-17, n=100; 18-24, n=121; 25-34, n=243; 35-44, n=231; 45-54, n=215; 55-64, n=153; 65+, n=180; White, n=1,037, Minority Ethnic Background, n=194; AB, n=358, C1, n=376, C2, n=248, DE n=252; Have a limiting condition n=372; No condition n=828

TikTok users are most likely to have come across content they perceive to be harmful, and are also most likely to expect to see such content on the platform in the future

Likelihood to encounter perceived harmful content in the next 3 months

92% of users have who have come across content they perceive to be harmful in the **last** 3 months report they believe they will come across such content in the **next** 3 months



* If a respondent says they had come across content they perceive to be harmful on any VSP, they are classified as 'yes' under 'Any VSP'

↑ Significantly higher than any VSP at 95% confidence

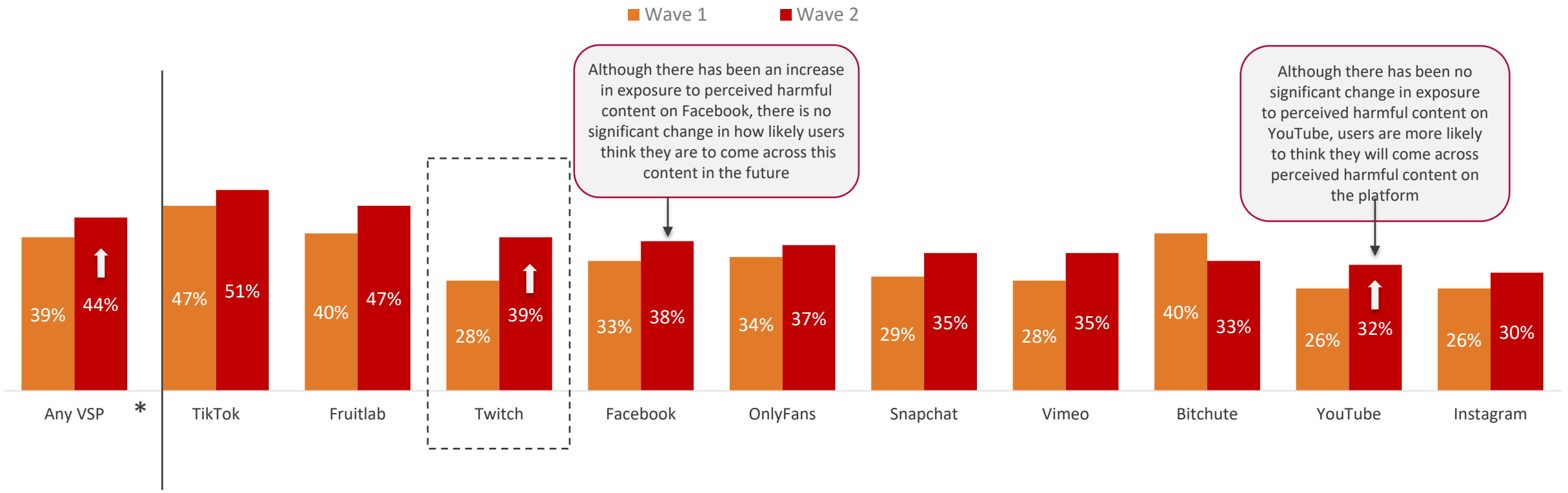
Source: VSP tracker Wave 2 (March '22)

Q3b. How likely or unlikely do you think you are to come across violent, abusive or inappropriate videos when using these sites or apps in the next 3 months?

Base: All who have used VSP in the last three months n=1,243, YouTube: W2 n=1141; Instagram: W2 n=760; TikTok: W2 n=522; Facebook: W2 n=1,043; Snapchat: W2 n=449; Twitch: W2 n=255; Bitchute: W2 n=119; OnlyFans: W2 n=179; Vimeo: W2 n=263; Fruitlab: W2 n=111

Twitch users are more likely to anticipate that they will come across perceived harmful content this wave, in line with increased exposure to content they perceive to be harmful on the platform

Likelihood to encounter perceived harmful content in the next 3 months (Wave 1 vs Wave 2): NET: Likely



White arrows denote significant shifts since Wave 1

* If a respondent says they had come across content they perceive to be harmful on any VSP, they are classified as 'yes' under 'Any VSP'

Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

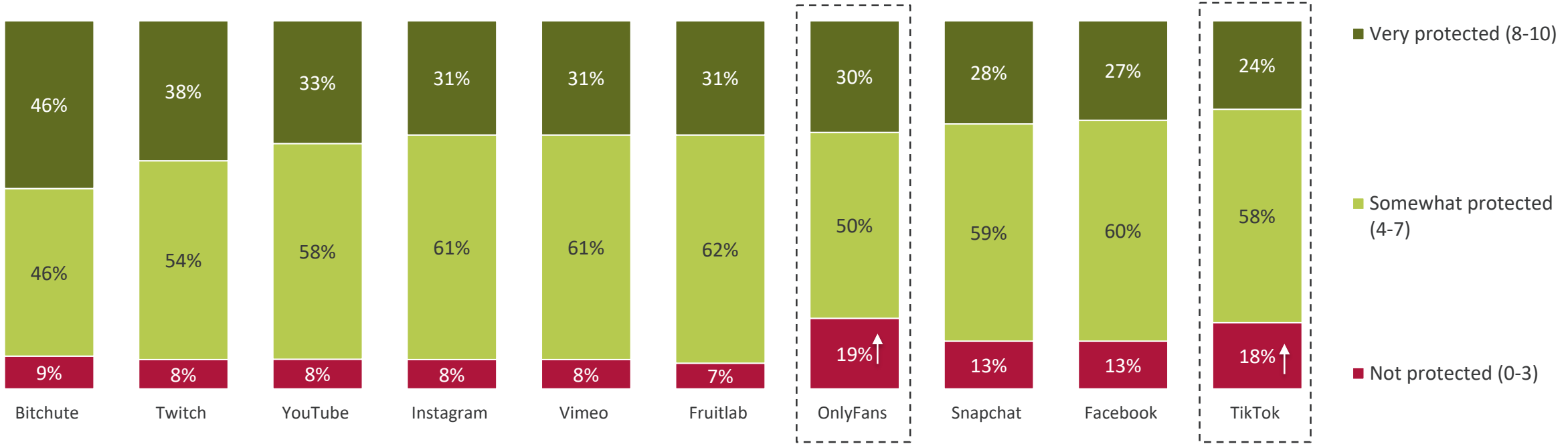
Q3b. How likely or unlikely do you think you are to come across violent, abusive or inappropriate videos when using these sites or apps in the next 3 months?

Base: All who have used VSP in the last three months W1 n= 1,259, W2 n=1,243, YouTube: W1 n=1,175, W2 n=1141; Instagram: W1 n=794, W2 n=760; TikTok: W1 n=516, W2 n=522; Facebook: W1 n=1,055, W2 n=1,043; Snapchat: W1 n=471,W2 n=449; Twitch: W1 n=297, W2 n=255; Bitchute: W1 n=131, n=119; OnlyFans: W1 n=198, W2 n=179; Vimeo:W1 n=268, W2 n=263; Fruitlab: W1 n=130; W2 n=111

Users of OnlyFans and TikTok are more likely to feel they are not protected from content they perceive to be violent, abusive or inappropriate, compared to users of the other VSPs

How protected users feel by VSP

No significant changes since Wave 1
This could be due to the relatively low base size of some of the smaller VSPs.
While there wasn't a great deal of differentiation between platforms in W1, OnlyFans and TikTok clearly stand out this wave.



↑ Significantly higher than all other VSPs at 95% confidence

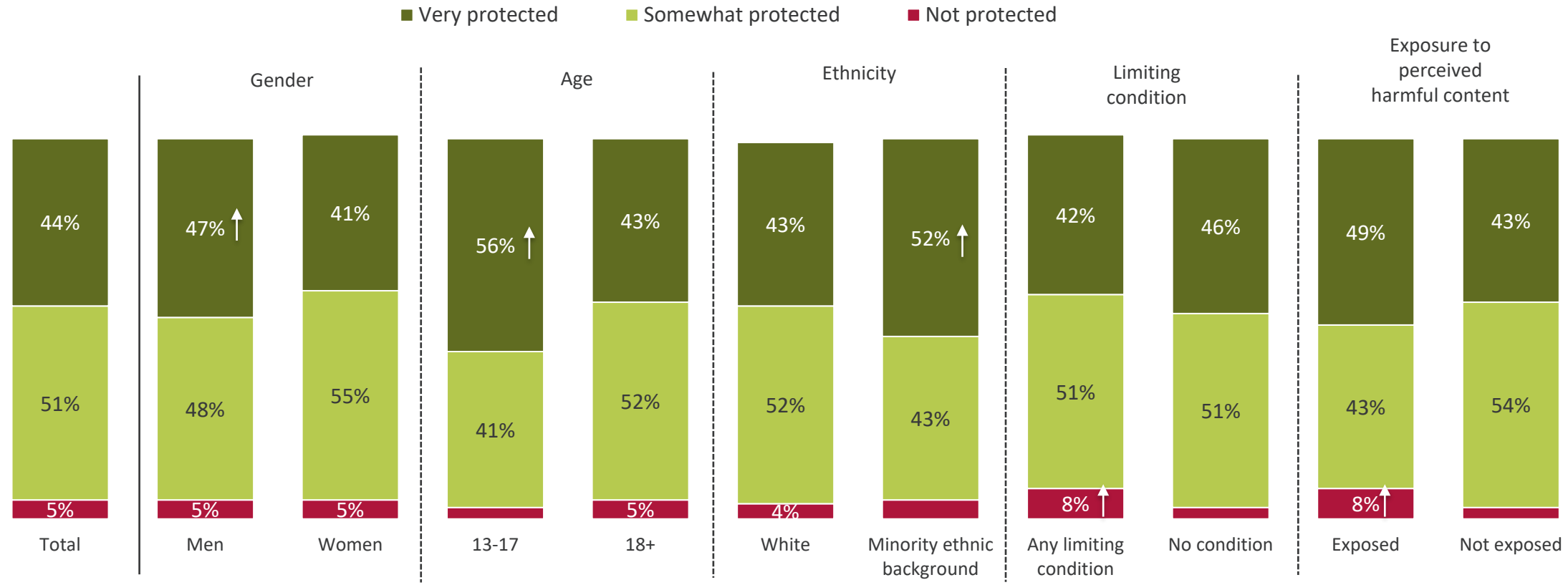
Source: VSP tracker Wave 2 (March '22)

Q4. On a scale from 0-10, where 0 means completely unprotected and 10 means completely protected, how protected or unprotected do you feel from violent, abusive or inappropriate videos when using these sites or apps?

Base: All who have used VSP in the last three months n=1,243, YouTube: W2 n=1141; Instagram: W2 n=760; TikTok: W2 n=522; Facebook: W2 n=1,043; Snapchat: W2 n=449; Twitch: W2 n=255; Bitchute: W2 n=119; OnlyFans: W2 n=179; Vimeo: W2 n=263; Fruitlab: W2 n=111

VSP users with a limiting condition and those who have previously claimed to have been exposed to content they perceive to be harmful tend to feel more unprotected on VSPs

Subgroups that feel protected/unprotected: Any VSP



No significant changes since Wave 1

↑ Significantly higher than the total at 95% confidence

Source: VSP tracker Wave 2 (March '22)

Q4. On a scale from 0-10, where 0 means completely unprotected and 10 means completely protected, how protected or unprotected do you feel from violent, abusive or inappropriate videos when using these sites or apps? Base: All respondents n=1,243; Male n=663, Female n=575; 13-17 n=100; 18+ n=1,143; White n=1037; Minority Ethnic Background n=194; Any limiting condition n=372; No condition n=828; Claimed previous exposure, n=364; Claimed no exposure, n=862

Labels shown >3%

Section 3
Awareness and recall of safety measures

Key findings, Wave 2 vs. Wave 1

1. Four in ten (40%) report at least some awareness of safety measures on VSPs. This represents **no change in overall awareness of safety measures** since Wave 1. However, awareness amongst those who have claimed to have been exposed to content they perceived to be harmful has increased from 47% to 57%.

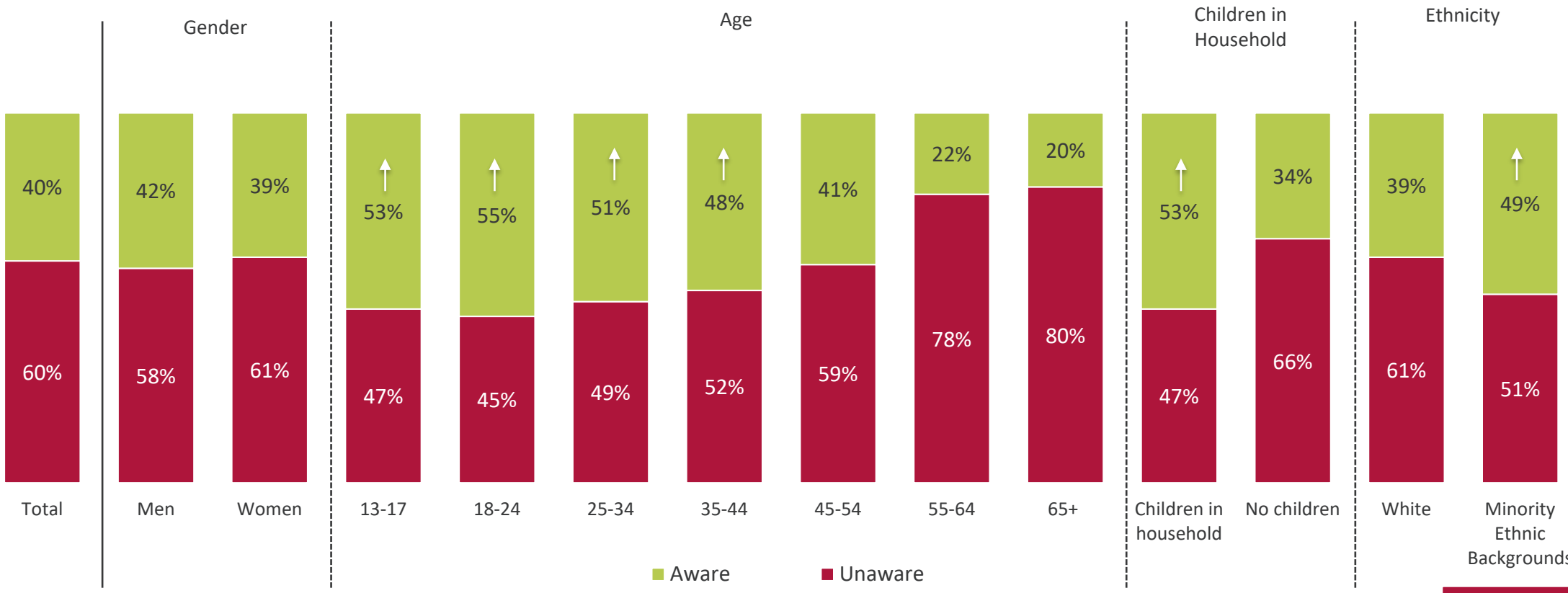
2. **Awareness of safety measures is higher on lesser-used VSPs**, especially on adult apps/sites. There is no significant change in awareness on any of these VSPs compared to Wave 1.

3. The top reason awareness of safety measures continues to be low is that **users have never had cause to look for them (59%)**, in line with low levels of exposure to perceived harmful content.

4. Although awareness is relatively low, the majority perceive VSPs to have **at least one safety measure in place (88%)**, with flagging and reporting mechanisms, and parental controls, being the top measures. However, there is still a **lack of certainty** around the safety measures that platforms have in place, and 12% do not believe there are **any** measures in place.

Four in ten are aware of safety measures on VSPs; awareness is higher amongst younger users, those with children in the household, and minority ethnic groups

Awareness of safety measures by demographics



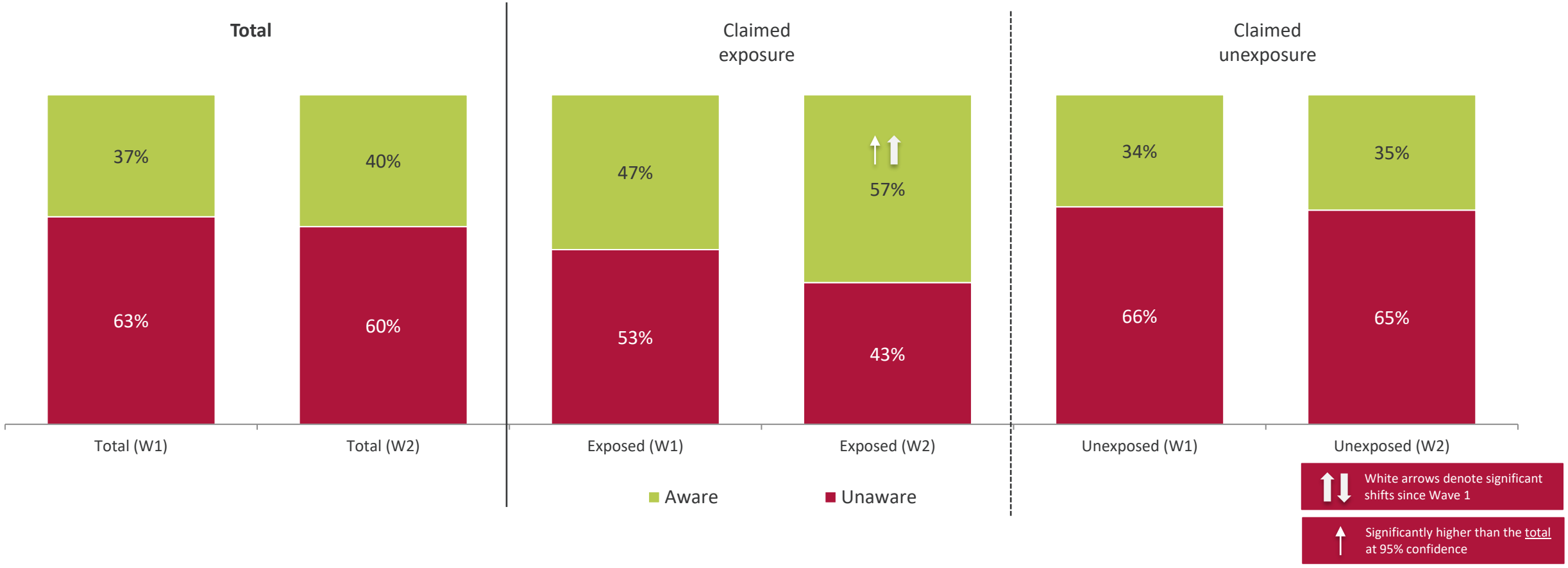
Source: VSP tracker Wave 2 (March '22)

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 n=1,243; Male n=663, Female n=575; 13-17, n=100; 18-24, n=121; 25-34, n=243; 35-44, n=231; 45-54, n=215; 55-64, n=153; 65+, n=180; Children in household, n=469; No children, n=773; White, n=1037; Minority Ethnic Groups, n=194

Users previously claiming to have been exposed to perceived harmful content continue to be more aware of safety measures; there has been an increase in awareness amongst this exposed group since Wave 1

Awareness of safety measures by demographics: (Wave 1 vs Wave 2)



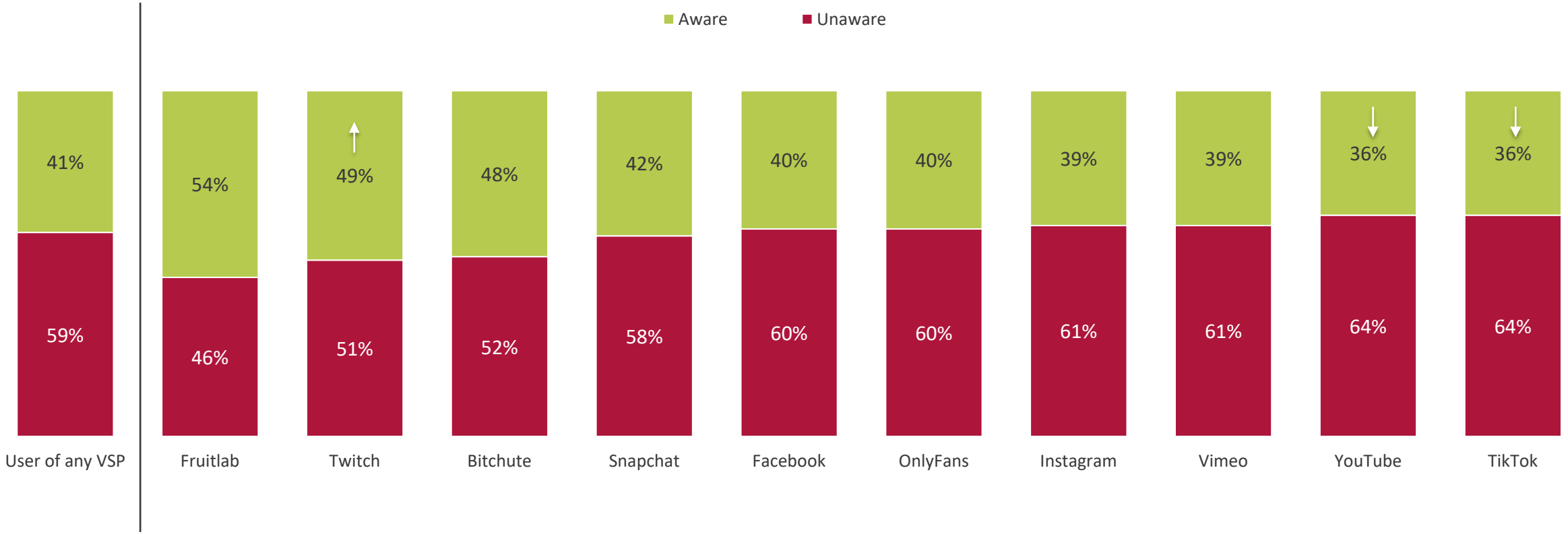
Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

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; Claimed previous exposure, W1 n=319, W2 n=364; Claimed no exposure, W1 n=922, W2 n=862

Users of Fruitlab, Twitch and Bitchute tended to be more aware of the safety measures in place (though these services are less-used than other VSPs) than users of other VSPs. Awareness of safety measures overall tends to be lowest for users of YouTube and TikTok

Awareness of safety measures by specific VSP



* If a respondent says they had come across content they perceive to be harmful on any VSP, they are classified as 'yes' under 'Any VSP'

↑↓ Significantly higher / lower than any VSP at 95% confidence

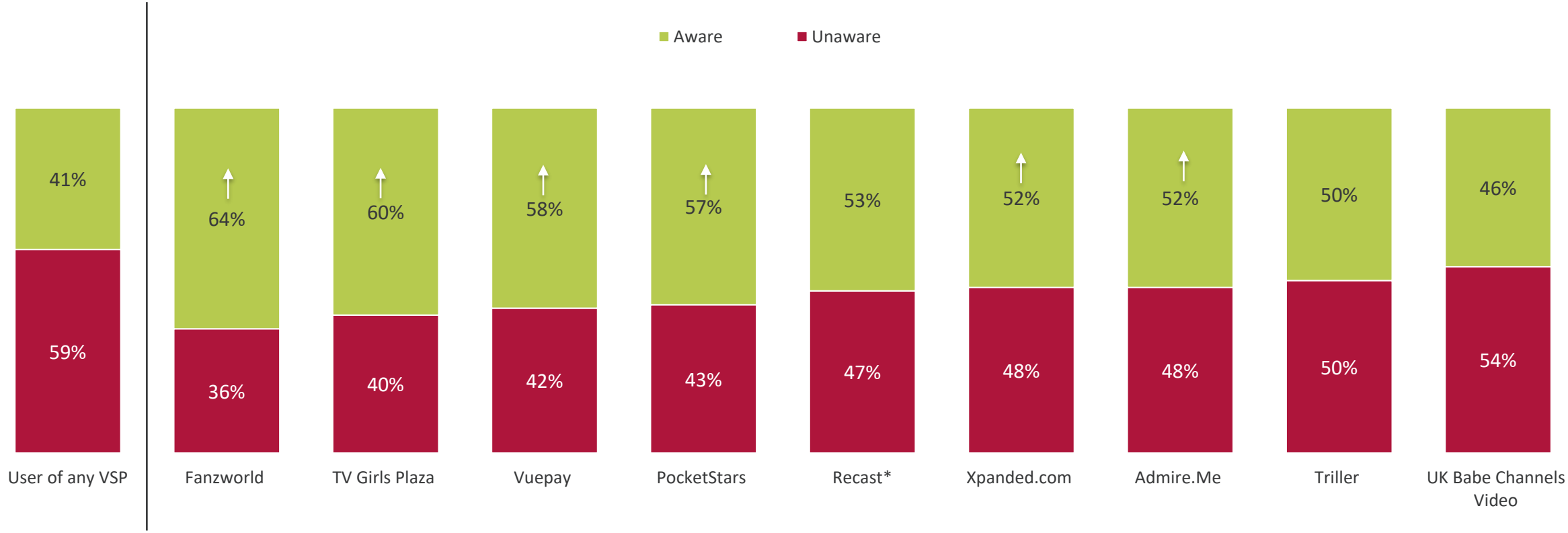
Source: VSP tracker Wave 2 (March '22)

Q6b. Thinking about the websites you have used in the last 3 months, how much, if at all, are you aware of rules or safety measures put in place on them to protect users from violent, abusive or inappropriate videos?

Base: All who have used VSP in the last three months n=1,243, W2 YouTube: n=1,141, W2 Instagram: n=760, W2 TikTok: n=522, W2 Facebook: n=1,043, W2 Snapchat: n=449, W2 Twitch: n=255, W2 Bitchute: n=119, W2 OnlyFans: n=179, W2 Vimeo: n=263, W2 Fruitlab: n=111

Of the other nine VSPs, users are more aware of safety measures on Fanzworld, TV Girls Plaza, Vuepay, PocketStars, Xpanded.com and Admire.me

Awareness of safety measures by specific VSP: 9 Other VSPs



* If a respondent says they had come across content they perceive to be harmful on any VSP, they are classified as 'yes' under 'Any VSP'

↑↓ Significantly higher / lower than any VSP at 95% confidence

Source: VSP tracker Wave 2 (March '22)

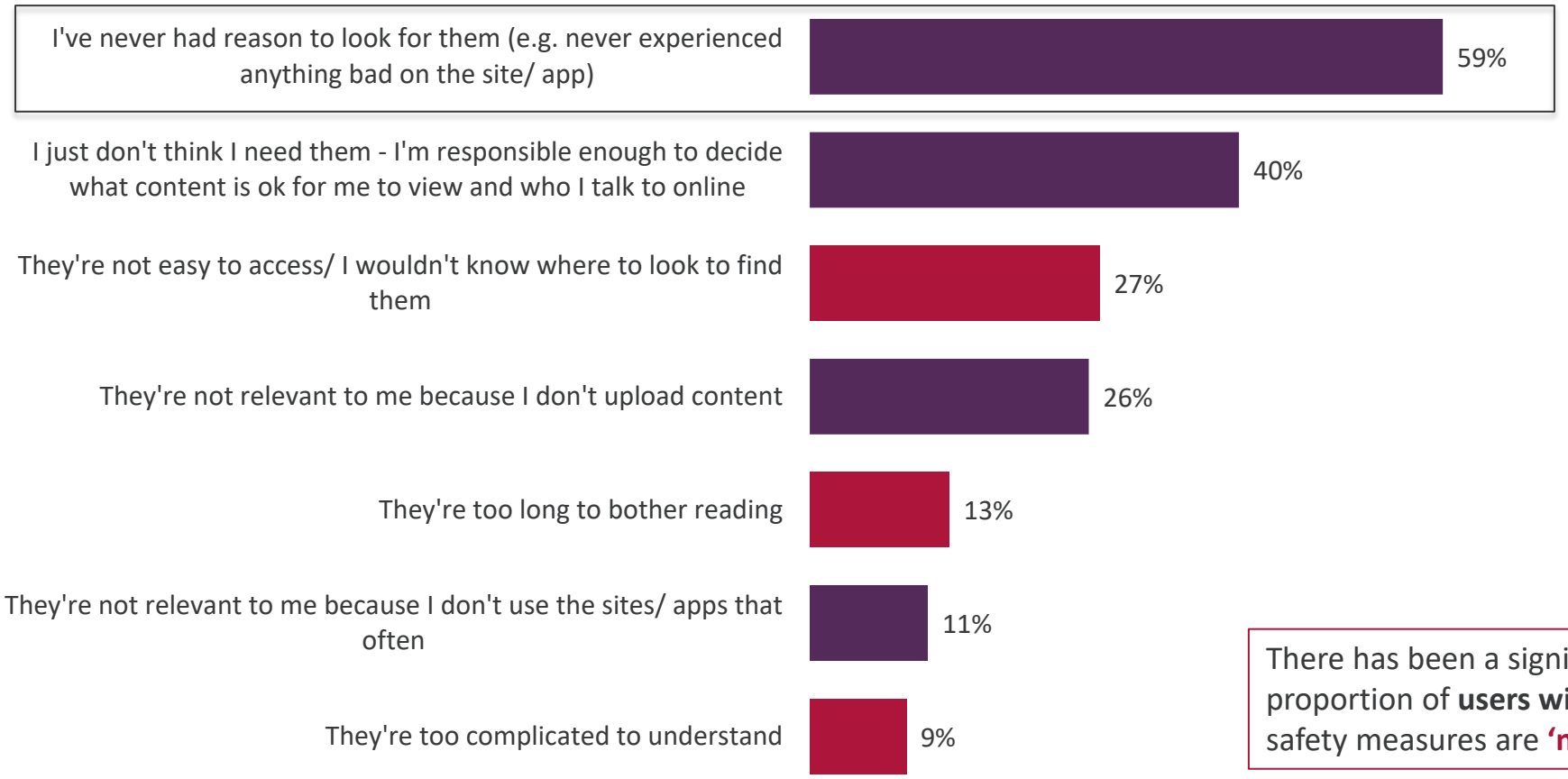
Q6b. Thinking about the websites you have used in the last 3 months, how much, if at all, are you aware of rules or safety measures put in place on them to protect users from violent, abusive or inappropriate videos?

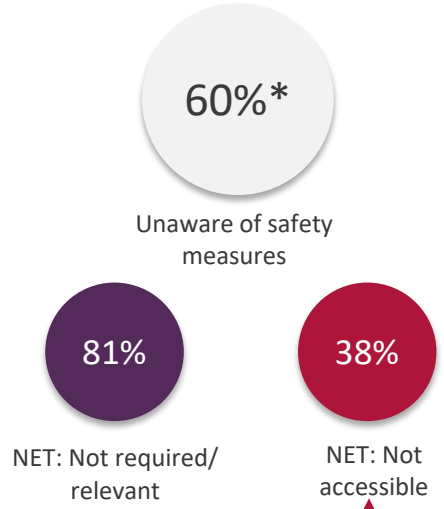
Base: All who have used VSP in the last three months n=1,243, W2 Fanzworld: n=99, W2 TV Girls Plaza: n=93, W2 Vuepay n=131, W2 PocketStars n= 115, W2 Recast n=124, W2 Xpanded.com n=109, W2 Admire.me n=109, W2 Triller n=124, W2 UK Babe Channels Video n=118

*For Recast, aware % is not significantly different compared to the any VSP % – this is due to the size of weighted bases (the bases listed above are unweighted).

Six in ten are unaware of safety measures; for the majority of these, this is because they claim they have never had a reason to look for them

Reasons for lack of safety measure awareness:





There has been a significant increase wave-on-wave in the proportion of **users with a limiting condition** reporting that safety measures are **'not accessible'**: W1 **36%** v W2 **48%.**

Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

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

*This is based on 60% referenced on slide 25/26 for Q6, slides 27/28 show 59% as Q6b asks respondents to consider specifically websites they have used in the last 3 months

In terms of specific measures that users are aware of, there has been an increase in Wave 2 in awareness of rules and action taken against content perceived to be harmful

Awareness of safety measures: open answers (unprompted)

Top 3 responses

1. Rules and action against perceived harmful content

"If inappropriate videos or messages are uploaded, the offensive material would be taken down and the offending account could be blocked or suspended"

32% vs 41% ⇧

W1 W2

2. Button / mechanism to report perceived harmful content and accounts

"Most of these sites have the facility to report content which is abusive and you can also block the person writing it"

23% vs 26%

W1 W2

3. Tools / people that check for perceived harmful content

"I believe there are AI tools which interpret whether videos are acceptable content or not"

20% vs 21%

W1 W2

More prominent themes

4. Site settings/terms of use – 15%
5. System to block or ban perceived harmful content and accounts – 14%
6. Age restrictions – 13%
7. Warnings/tips on staying safe - 10%
8. Parental controls/child safety mechanisms – 5%
9. Account verification processes – 4%
10. Regulatory bodies – 0%

Less prominent themes

⇅ White arrows denote significant shifts since Wave 1

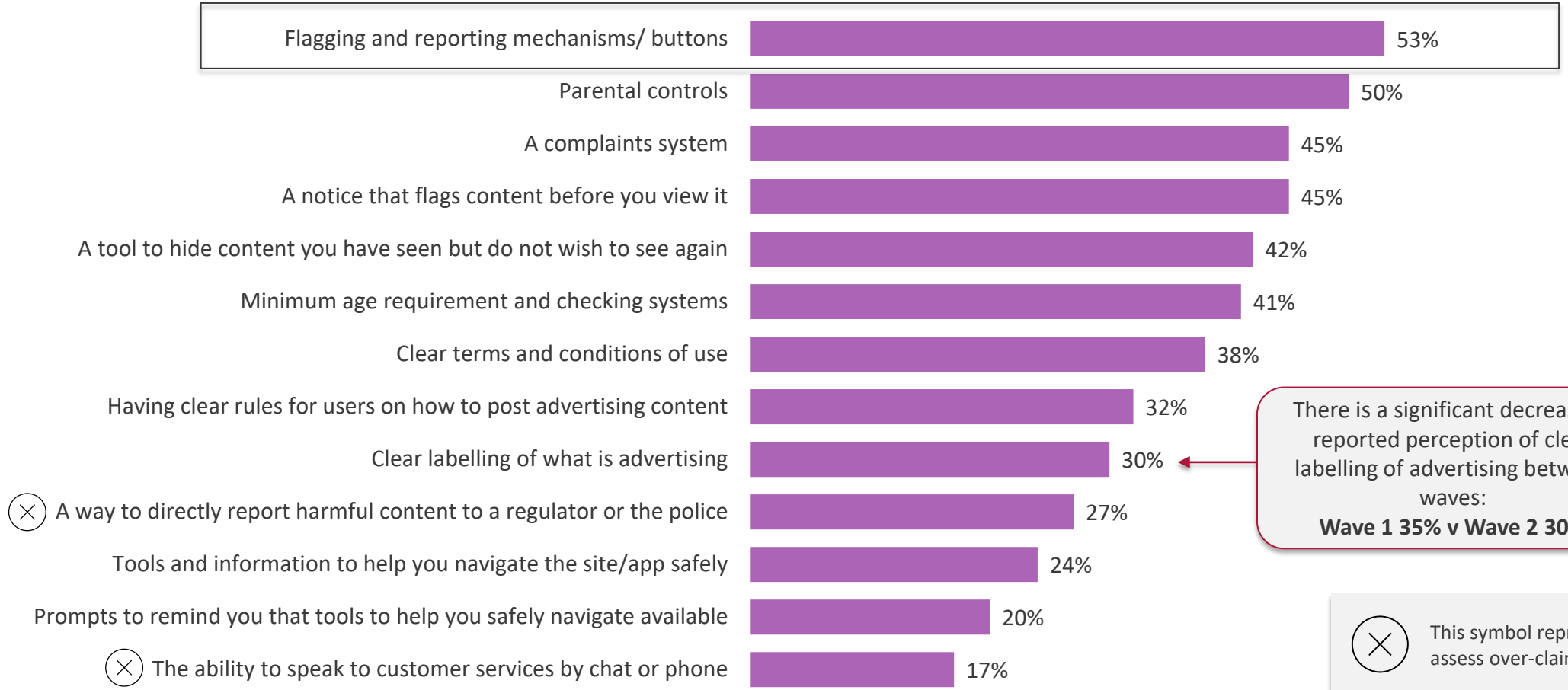
Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

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 respondents aware of safety measures on sites/apps W1 n=531; W2 n=570

The majority of VSP users perceive there to be at least one safety measure in place, with flagging/reporting mechanisms and parental controls being the top measures

Safety measures users perceive to be in place on any VSP:



88%

Believe there is at least one measure

12%

Do not believe any of these safety measures are in place

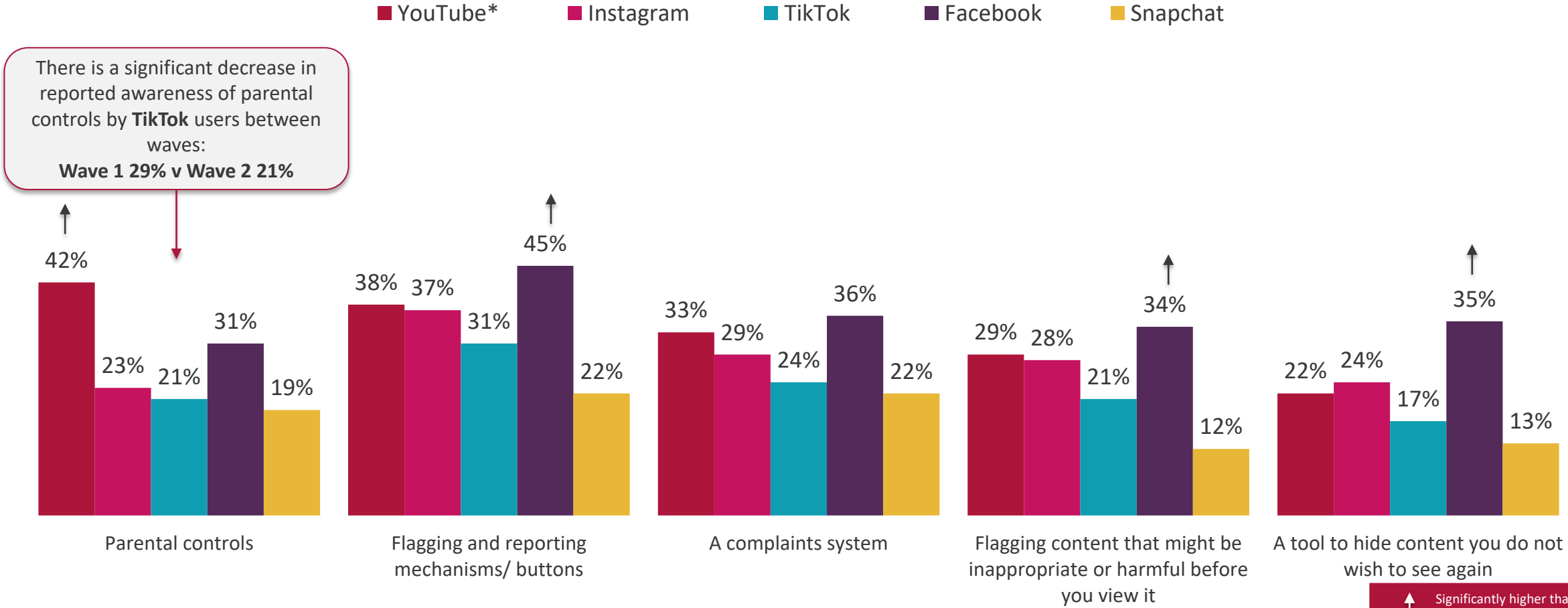
There is a significant decrease in reported perception of clear labelling of advertising between waves:
Wave 1 35% v Wave 2 30%

This symbol represents dummy measures included to assess over-claim.

Source: VSP tracker VSP tracker Wave 2 (March '22)
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

Facebook users are most likely to believe the 5 safety measures mentioned most overall are in place on that platform, while Snapchat users are least likely

Safety measures users perceive to be in place on YouTube, Instagram, Facebook, TikTok, Snapchat: pt.1 (top 5)



*YouTube could include YouTube Kids as YouTube Kids was not asked about directly in the questionnaire

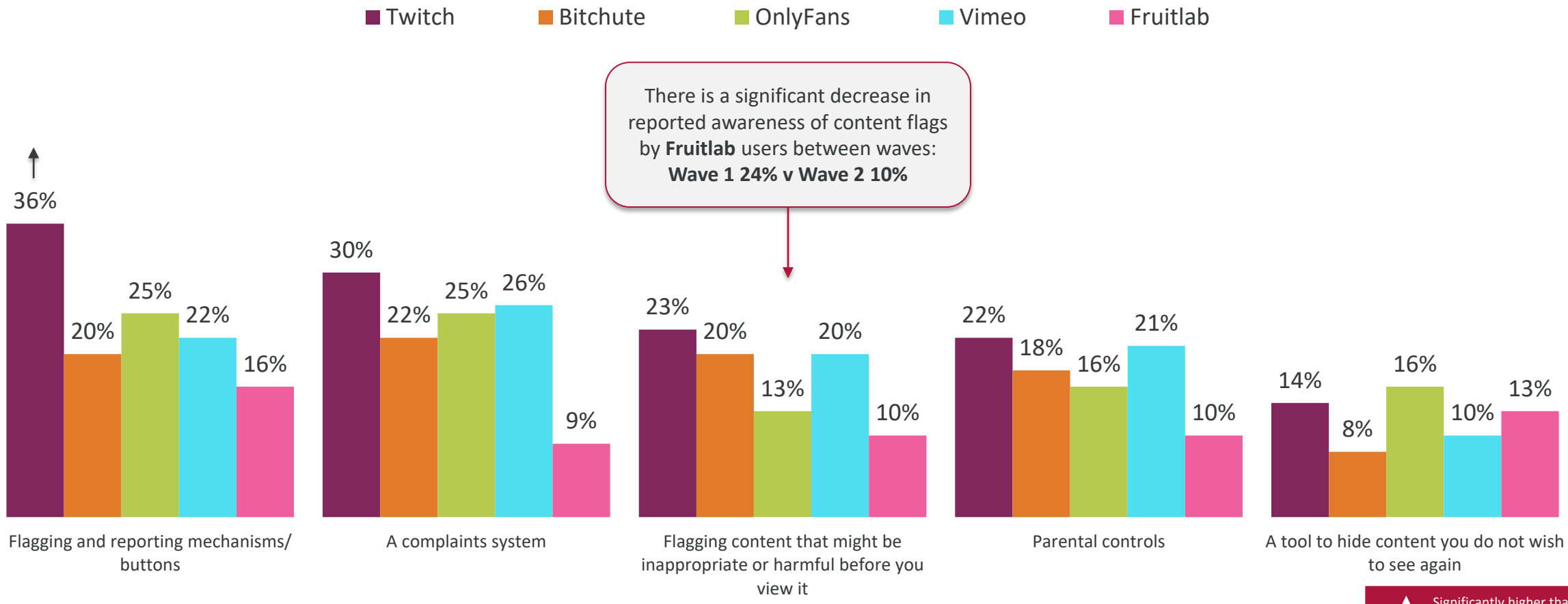
Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

Q10. Which of the following rules or safety measures do you think these sites and apps have in place?

Base: All who have used VSP in the last three months n=1,243, YouTube: n=1,141, Instagram: n=760, TikTok W1: n=516, W2 n=522, Facebook: n=1,043, Snapchat: n=449

Users of Twitch are more likely than users of Bitchute, OnlyFans, Vimeo and Fruitlab to perceive that platforms have flagging / reporting mechanisms in place

Safety measures users perceive to be in place on Twitch, Bitchute, OnlyFans, Vimeo, Fruitlab: pt.2 (top 5)



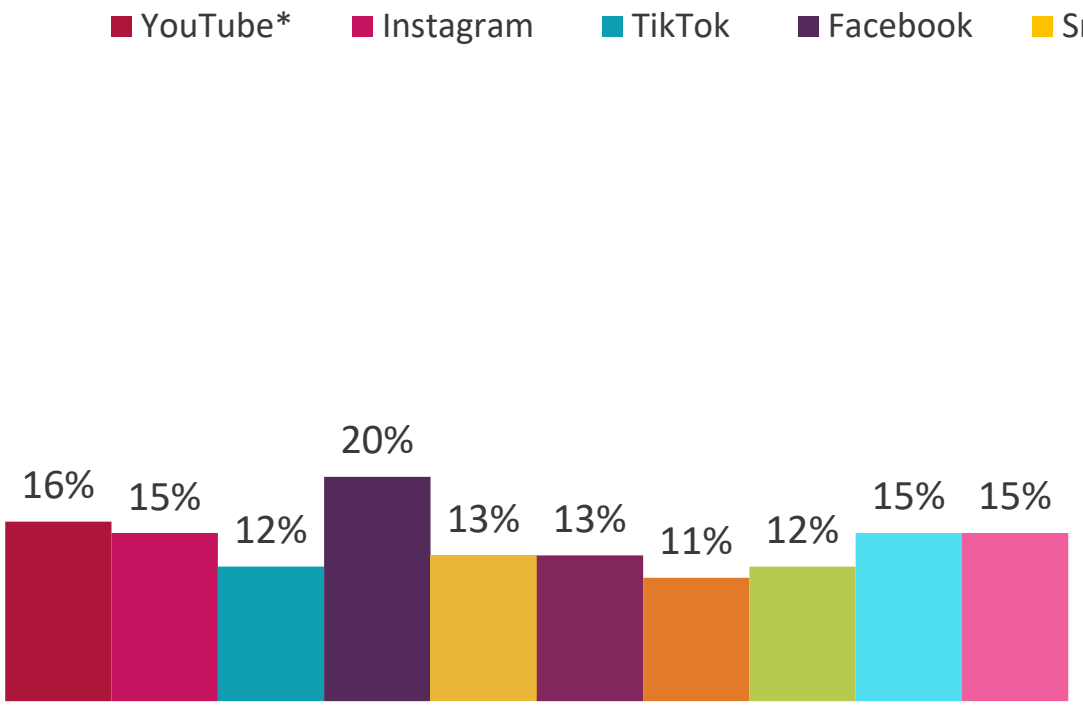
Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

Q10. Which of the following rules or safety measures do you think these sites and apps have in place?

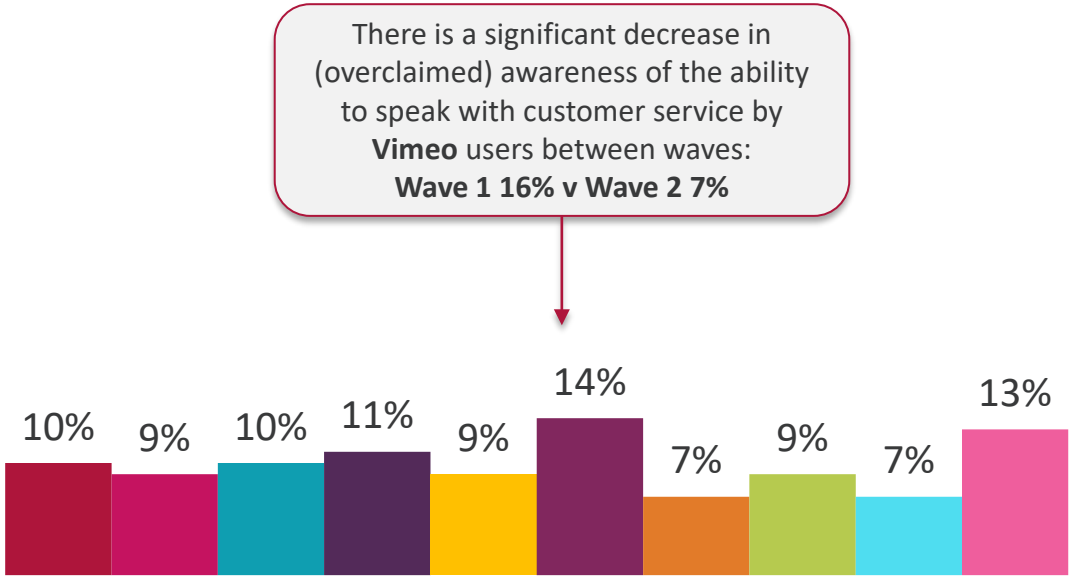
Base: all who have used VSP in the last three months n=1,243, Twitch: n=255, Bitchute: n=119, OnlyFans: n=179, Vimeo: n=263, Fruitlab W1: n=130, W2 n=111

Over one in ten users of each of the VSPs on this slide incorrectly perceive at least one 'dummy' measure is in place, indicating a lack of clarity around existing safety measures

Dummy measures users perceive to be in place on each VSP



A way to directly report harmful content to a regulator or the police



The ability to speak to customer services by chat or phone

*YouTube could include YouTube Kids as YouTube Kids was not asked about directly in the questionnaire

↑ Significantly higher than all other VSPs at 95% confidence

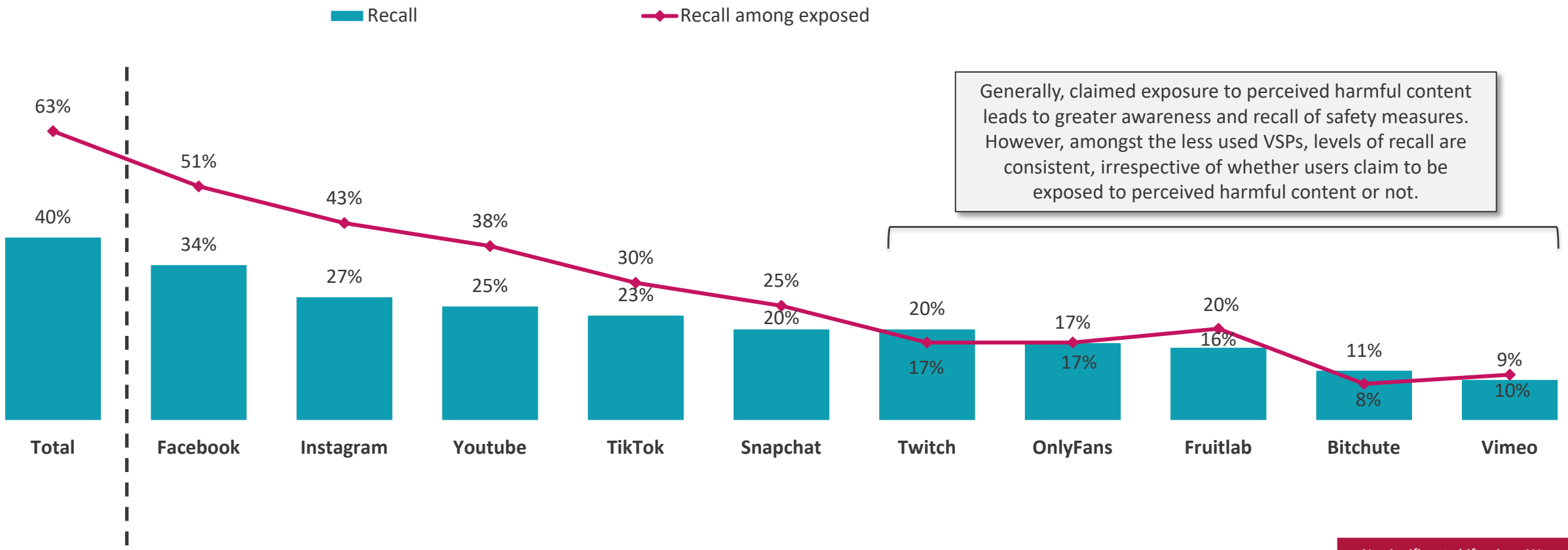
Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

Q10. Which of the following rules or safety measures do you think these sites and apps have in place?

Base: all who have used VSP in the last three months n=1,243, YouTube: n=1,141, Instagram: n=760, TikTok: n=522, Facebook: n=1,043, Snapchat: n=449; Twitch: n=255, Bitchute: n=119, OnlyFans: n=179, Vimeo W1: n=268, W2 n=263, Fruitlab: n=111

For the more frequently used VSPs, recall of safety measures tends to be higher amongst users who have been exposed to content they perceived to be harmful; recall is highest on Facebook

Recall of safety measures seen in the last 3 months



Generally, claimed exposure to perceived harmful content leads to greater awareness and recall of safety measures. However, amongst the less used VSPs, levels of recall are consistent, irrespective of whether users claim to be exposed to perceived harmful content or not.

No significant shifts since Wave 1

Source: VSP tracker Wave 2 (March '22)

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 previous exposure n=364

Section 4
Usage of safety measures

Key findings: Wave 2

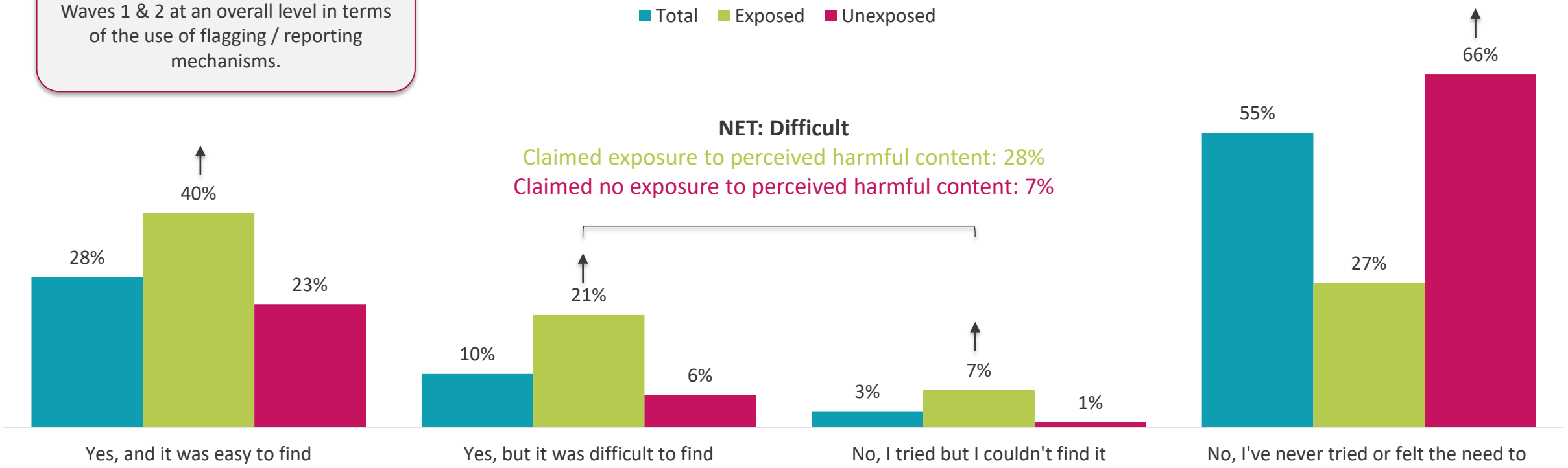
1 The **majority (58%) have never used flagging and reporting mechanisms**, although usage increases amongst those who claim to have been exposed to content they perceived to be harmful (of whom 61% have used).

2 However, over a quarter (28%) of users from this claimed exposure group found these **safety features difficult to find**.

Nearly three in ten of those (28%) who claim to have been exposed to content they perceive to be harmful have had difficulty using safety features, significantly more than those who have claimed not to have been exposed (7%)

Use of reporting mechanisms: Users who have experienced perceived harmful content vs. users who have not

There are **no significant shifts** between Waves 1 & 2 at an overall level in terms of the use of flagging / reporting mechanisms.



N.B. - Figures may not add up to 100% as 'can't remember' has not been reported

↑ Significantly higher than the total at 95% confidence

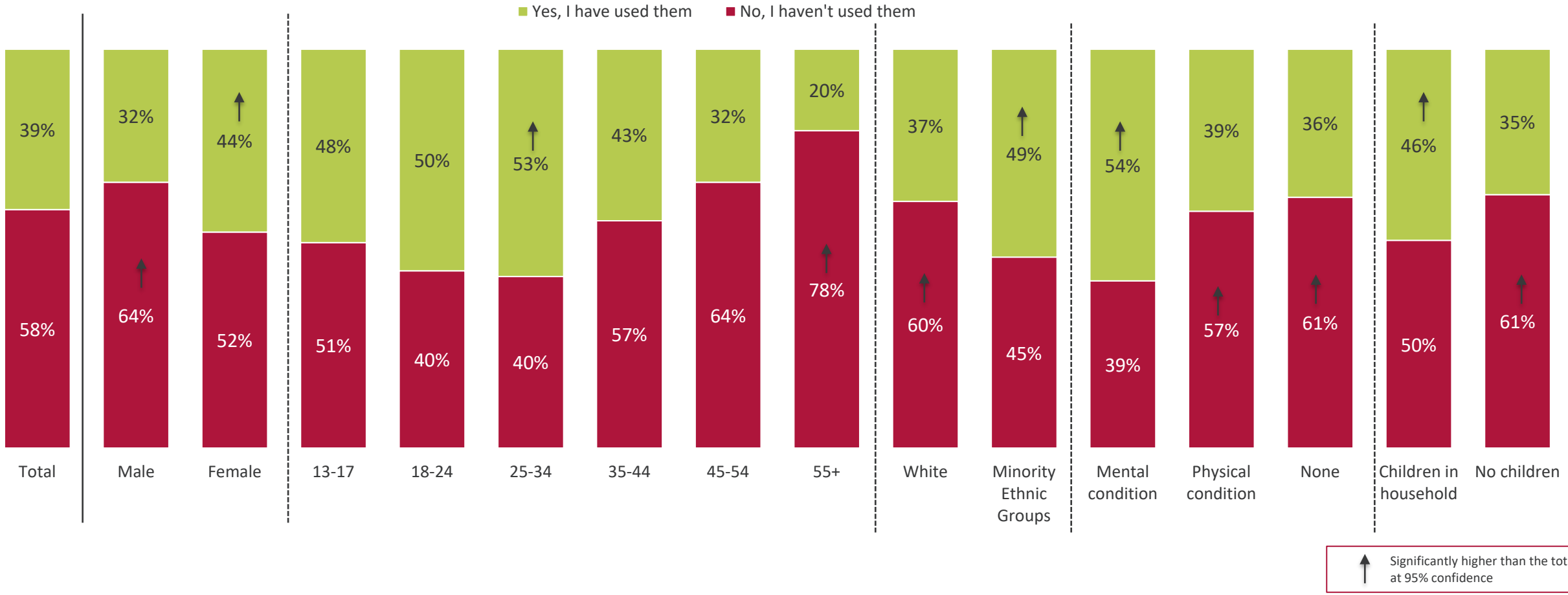
Source: VSP tracker Wave 2 (March '22)

Q11. You mentioned that you are aware some sites and apps have buttons or reporting mechanisms that allow users to flag or report content that is concerning to them. Have you ever used these buttons and/or mechanisms to flag content?

Base: All who are aware that some sites and apps have buttons or reporting mechanisms: Total, n=674; Claimed previous exposure, n=229; Claimed no exposure, n=441

Just under six in ten have never used reporting mechanisms before, although 18-44 year olds, those with a mental condition, and those with children are more likely to have used them

Use of reporting mechanisms by demographics

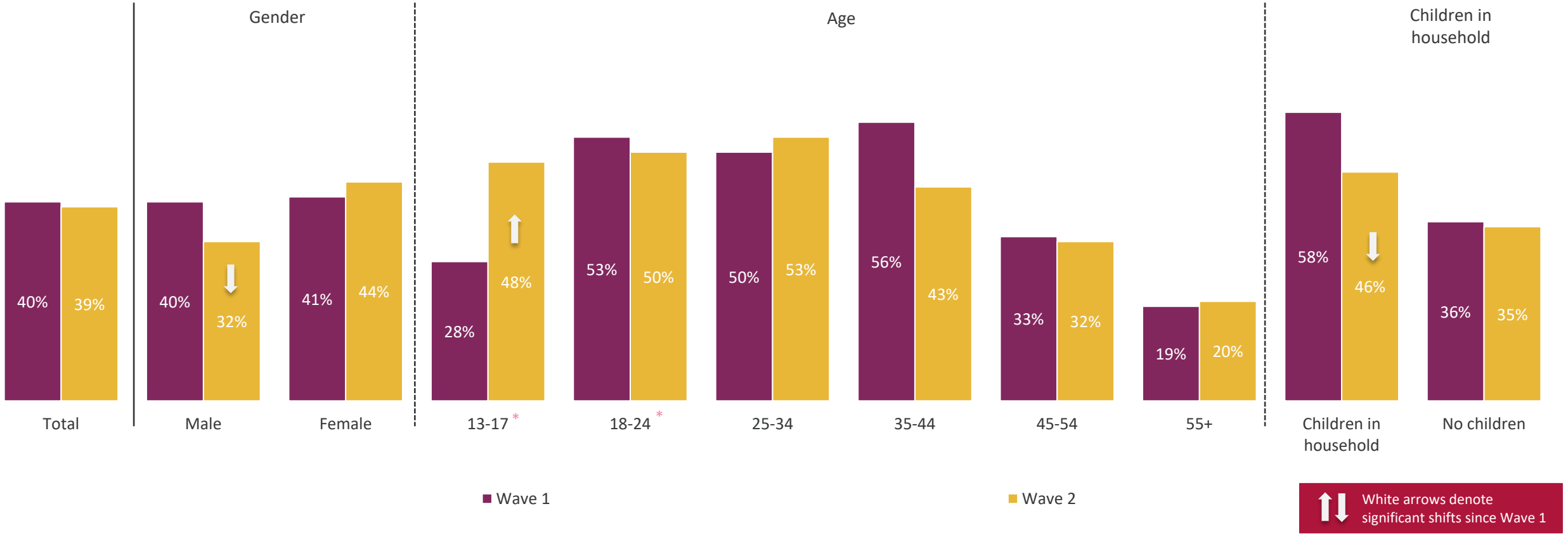


Source: VSP tracker Wave 2 (March '22)

Q11. You mentioned that you are aware some sites and apps have buttons or reporting mechanisms that allow users to flag or report content that is concerning to them. Have you ever used these buttons and/or mechanisms to flag content? Base: All who are aware that some sites and apps have buttons or reporting mechanisms: Total, n=674; Male, n= 358; Female, n=312; 13-17 n=55; 18-24, n=74; 25-34, n=142; 35-44, n=136; 45-54, n=128; 55+ n=139; White, n=548; Minority Ethnic Groups, n=121; Mental condition n=112, Physical condition n=118, No condition n=446; Children in household n=256, No children n=418

Use of reporting mechanisms among 13-17 year olds has increased significantly since last wave, while use has decreased among male users and those with children in the household

Use of reporting mechanisms by demographics: Wave 1 vs Wave 2



Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

Q11. You mentioned that you are aware some sites and apps have buttons or reporting mechanisms that allow users to flag or report content that is concerning to them. Have you ever used these buttons and/or mechanisms to flag content? Base: All who are aware that some sites and apps have buttons or reporting mechanisms: Total W1, n=699; Male W1, n=400; Female W1, n=299; 13-17 W1, n=69; 18-24 W1, n=105; 25-34 W1, n=142; 35-44 W1, n=135; 45-54 W1, n=126; 55+ W1, n=122; Children in household W1, n=191, No children W1, n=438. Total W2, n=674, Male W2, n= 358 , Female W2, n=312, , 13-17 W2, n=55, 18-24 W2, n=74, 25-34 W2, n=142 , 35-44 W2 , n=136, 45-54 W2, n=128, 55+ W2, n=139, Children in household W2, n=256, No children W2, n=418.

Section 5
Attitudes towards protection and responsibility

Key findings: Wave 2 vs. Wave 1

1. Attitudes towards protection and responsibility are consistent with Wave 1. While VSP users are more likely to think **stricter rules/regulations are needed** (38% say this vs. 16% say the existing rules are enough), a large proportion hold a neutral opinion (46%).

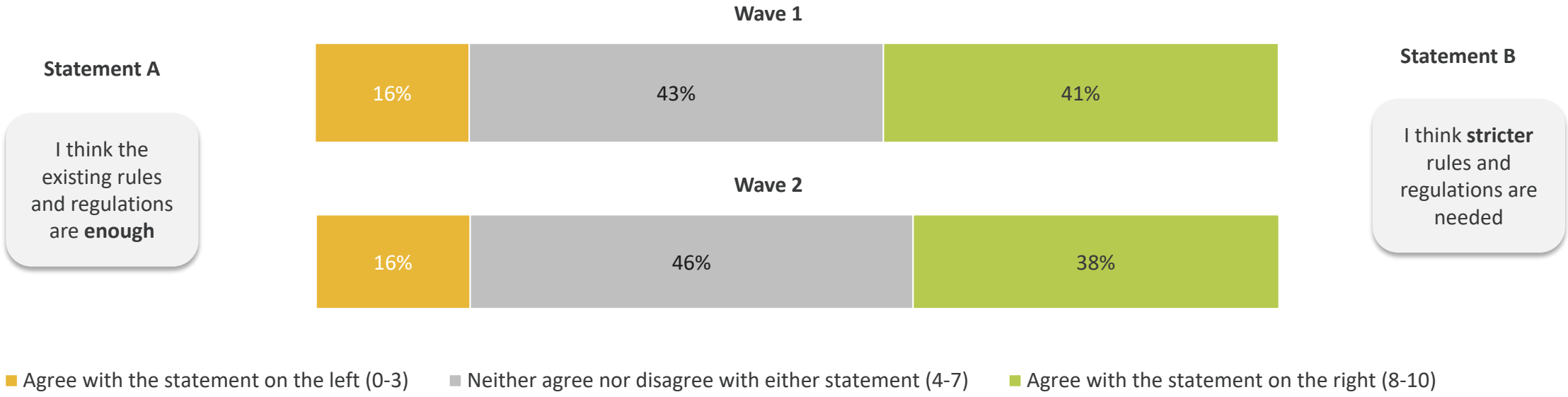
2. VSP users predominantly believe that the **responsibility of protecting users lies with the site/app** itself (79%), and that children should be least responsible for protection (22%).

3. Safety measures are perceived as important for most types of content, although most necessary for **content that encourages self harm** (84% say safety measures are definitely needed here). Safety measures are considered less essential for videos containing misleading information and those promoting eating disorders (where 64% and 62% say safety measures are definitely needed respectively).

4. VSP users are slightly more inclined towards wanting to **select their own protective measures** (36% say this vs. 29% say they want measures predetermined by the site/app). However, the clear majority (81%) believe the site should step in and **take protective action** against inappropriate content, usually **immediately**.

Around two in five VSP users think stricter rules and regulations are necessary, similar to Wave 1; however, a large proportion continue to have a neutral opinion

Views on safety measures (Wave 1 vs Wave 2):



More likely than the total to agree with statement A

- Users of Bitchute (38%), Twitch (23%) and OnlyFans (22%)
- Men (22%) vs women (10%)
- VSP users aware of safety measures (22%) vs those unaware (11%)

More likely than the total to agree with statement B

- Users of Facebook (40%)
- Women (46%) vs men (30%)
- Older respondents over 55 (47%)
- VSP users who have previously encountered content they perceived to be harmful (46%) vs those who haven't (36%)

No significant shifts since Wave 1

Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

Q12. 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 W1 n=1,259; W2 n=1,243; Males n=663; Females n=575; 55+ n=333; Bitchute users n= 119; Twitch users n=255; OnlyFans users n=179; Facebook users n=1043; Claimed exposure to perceived harmful content n=364; Claimed no exposure n=862; Aware of safety measures n=570; Not aware n=673

The majority of users believe that it is the VSP's responsibility to protect users from harmful content; views on the ease of use of reporting mechanisms are more split

Views on safety measures:

Statement A

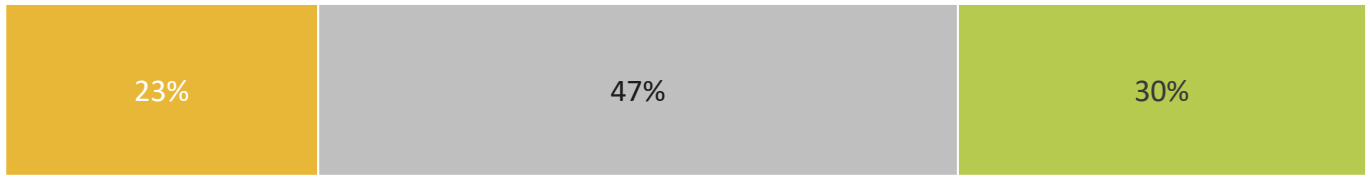
Websites/apps have a particular responsibility to protect internet users from violent, inappropriate or abusive videos

Statement B

It is the responsibility of **internet users** to protect themselves from violent, inappropriate or abusive videos

Statement A

It is **easy to access/ use** flagging and reporting mechanisms on websites and apps



Statement B

Flagging and reporting mechanisms on websites and apps **need to be made easier to access/ use**

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)

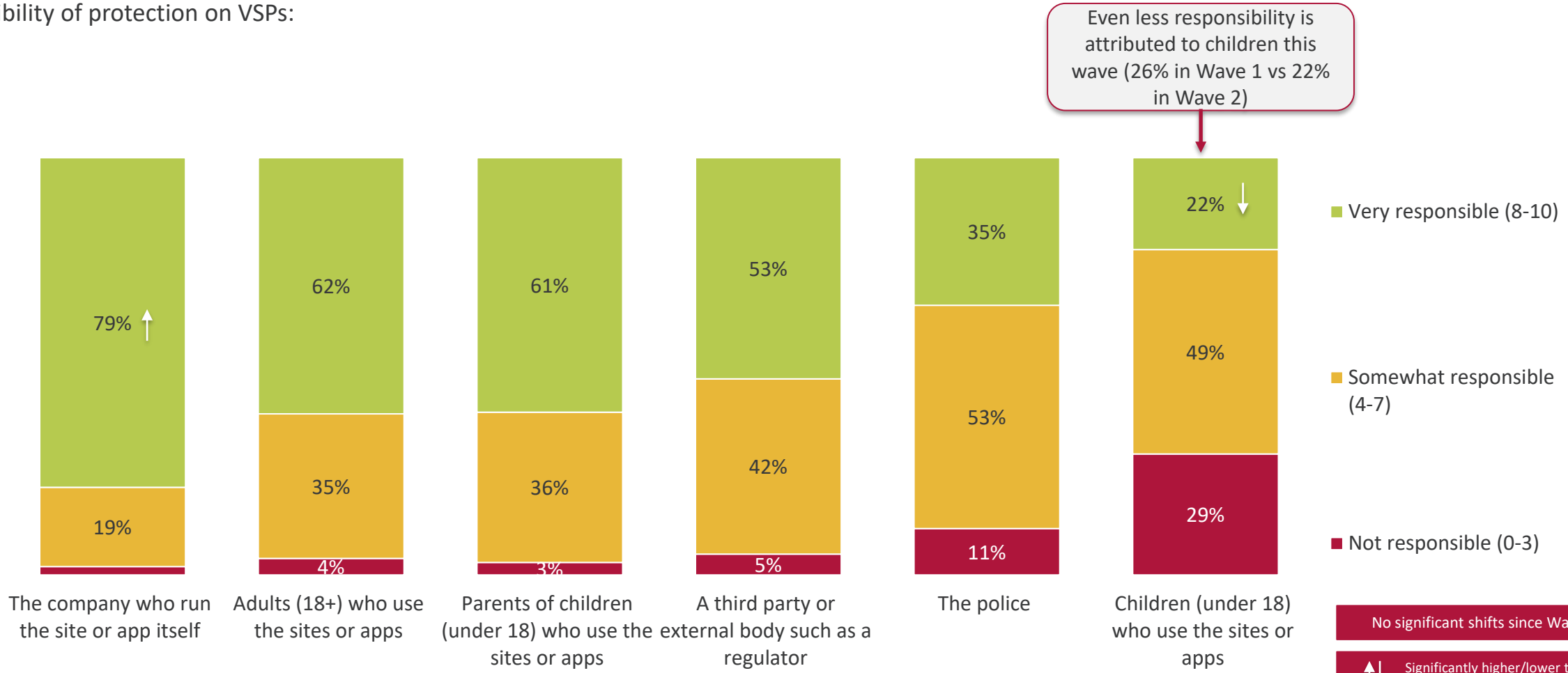
Source: VSP tracker Wave 2 (March '22)

Q12. 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

VSP users continue to feel that the site/app itself is predominantly responsible for protecting users, while children are held least responsible

Responsibility of protection on VSPs:



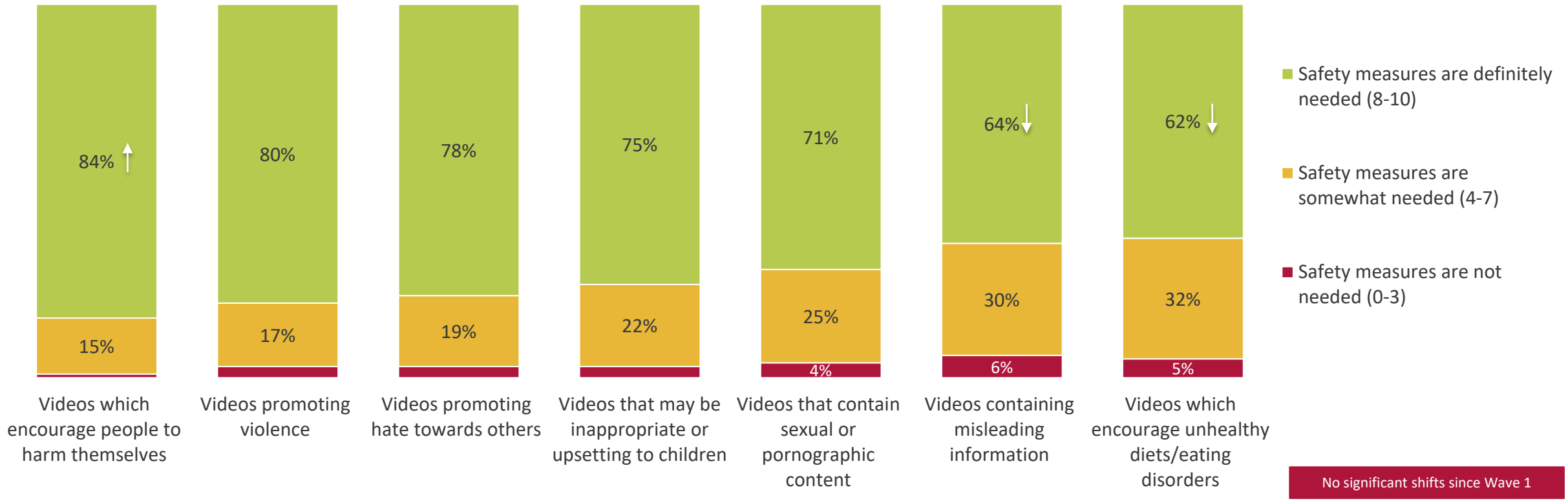
Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

Q5. How much responsibility do you feel each of the following should take when it comes to protecting users from violent, abusive or inappropriate videos on the sites and apps we've been thinking about? Please use a scale of 0 to 10 where 0 mean no responsibility and 10 means full responsibility.

Base: All respondents W1 n=1,259; W2 n=1,243

Safety measures are considered necessary for most types of content, and above all for videos that encourage self-harm

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



No significant shifts since Wave 1

Significantly higher/lower than all other options at 95% confidence

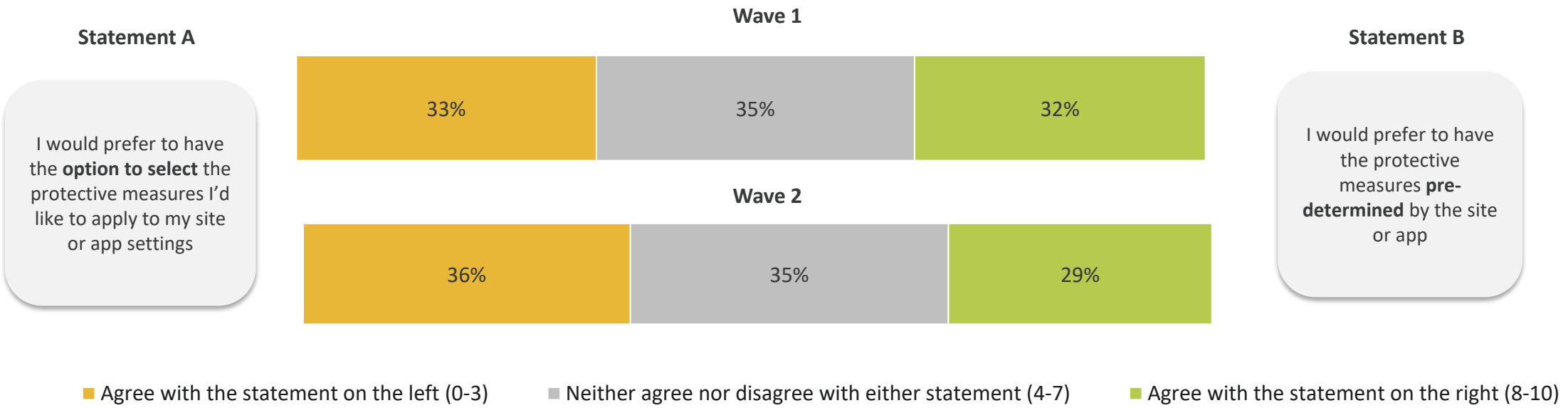
Source: VSP tracker Wave 2 (March '22)

Q13. On a scale of 0-10, where 0 means the sites and apps should have no rules or safety measures in place and 10 means they should definitely have rules and safety measures in place, to what extent do you think there should or should not be rules and safety measures for the following types of content on sites and apps such as ...?

Base: All respondents n=1,243 - Labels shown >3%

Views on the default settings of protective measures remained evenly split, and relatively consistent between waves

Views on the application of safety measures (Wave 1 vs Wave 2):



More likely than the total to agree with statement A

- Men (46%) vs women (27%)
- Younger VSP users aged 18-44
- Users who have previously encountered content they perceived to be harmful (42%) vs those who haven't (34%)
- Users of Bitchute (58%) and OnlyFans (51%)

More likely than the total to agree with statement B

- Women (36%) vs men (22%)
- Older VSP users aged 55+ (46%)
- Users who have not previously encountered content they perceived to be harmful (31%) vs those who have (21%)

No significant shifts since Wave 1

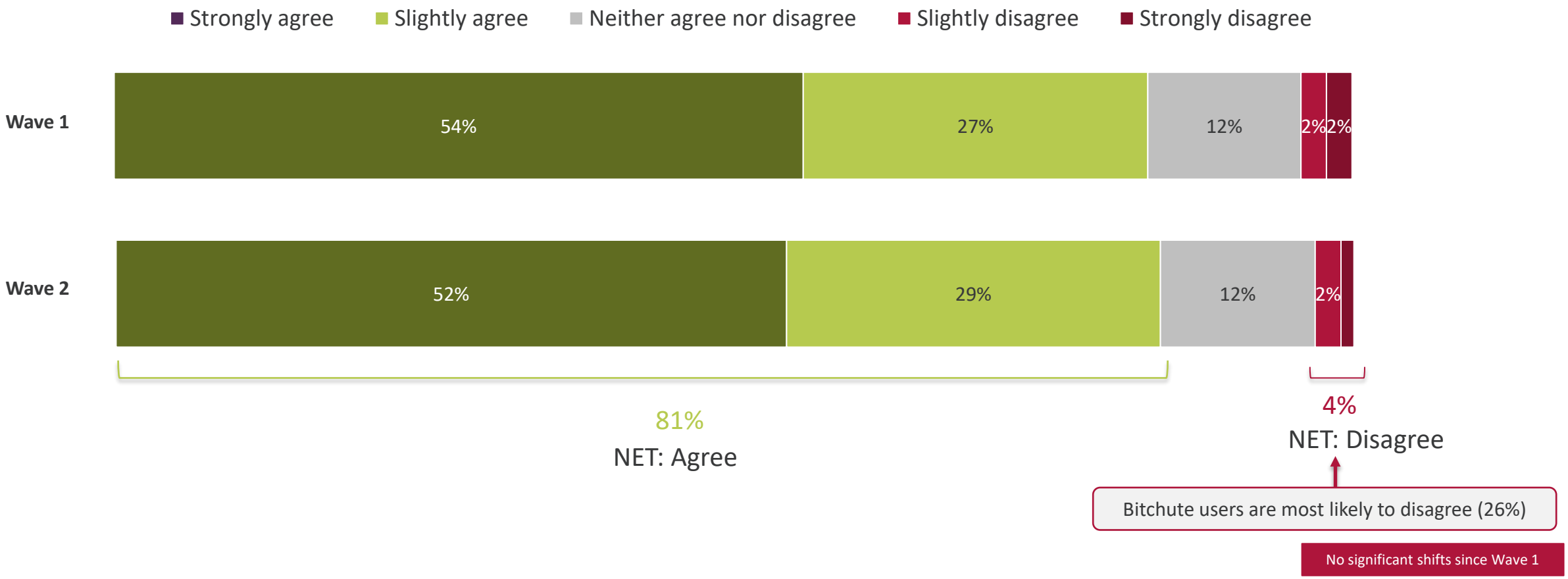
Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

Q14. 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 W1 n=1,259; W2 n=1,243; Males n=663; Females n=575; 18-44 (121-243) 55+ n=333; Bitchute users n= 119; OnlyFans users n=179; Facebook users, n=1,043; Claimed exposure to perceived harmful content n=364; Claimed no exposure n=862

However, a clear majority continue to believe that sites/apps should take protective action towards content that they deemed inappropriate

Extent to which users agree/disagree that protective action should be taken by sites (Wave 1 vs Wave 2):



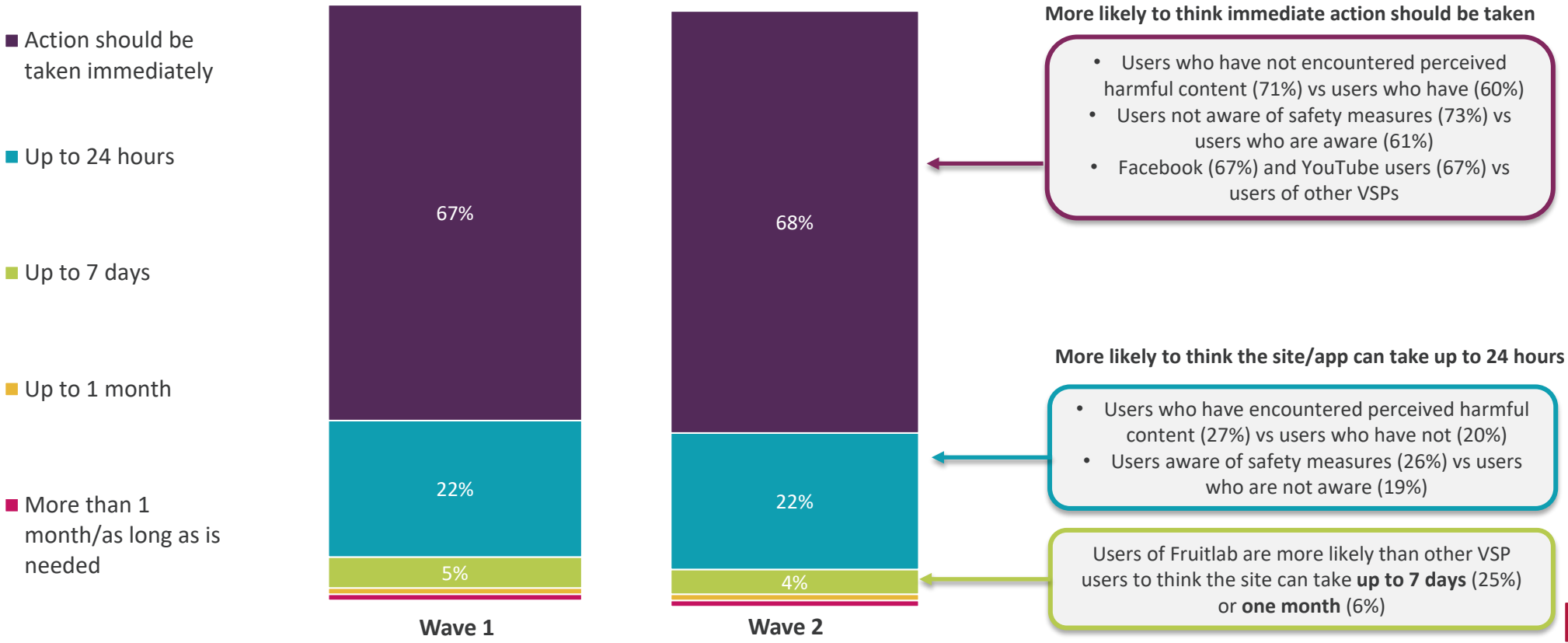
Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

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 W1 n=1,259; W2 n=1,243; Bitchute users W2 n=119

More than two in three VSP users continue to believe that a site/app should take immediate action when notified of content that is suspected of breaking its rules or safety measures

How long a site/app should take to solve a breach of its safety measures (Wave 1 vs Wave 2):



More likely to think immediate action should be taken

- Users who have not encountered perceived harmful content (71%) vs users who have (60%)
- Users not aware of safety measures (73%) vs users who are aware (61%)
- Facebook (67%) and YouTube users (67%) vs users of other VSPs

More likely to think the site/app can take up to 24 hours

- Users who have encountered perceived harmful content (27%) vs users who have not (20%)
- Users aware of safety measures (26%) vs users who are not aware (19%)

Users of Fruitlab are more likely than other VSP users to think the site can take **up to 7 days** (25%) or **one month** (6%)

No significant shifts since Wave 1

Source: VSP tracker Wave 1 (October '21) & Wave 2 (March '22)

Q16. If a site or app finds or is notified of violent, abusive or inappropriate videos that break its rules or safety measures, how long do you think the site or app should take to solve the issue?

Base: All respondents W1 n=1,259; W2 n=1,243; Claimed exposure to perceived harmful content W1 n=319; Claimed no exposure W1 n=922; Facebook users, W2 n=1,043; YouTube users W2 n=1,141; Fruitlab users W2 n=111; Claimed exposure to perceived harmful content W2 n=364; Claimed no exposure W2 n=862; Aware of safety measures W2 n=570; Not aware W2 n=673

Labels shown <4%

Section 6
Attitudes towards protection and responsibility amongst parents / guardians

Key findings (Wave 2 only*)

1. Parents/guardians are split on the ease of use of flagging/reporting mechanisms for **themselves** (30% believe they need to be made easier to access/use, while 29% believe they are already easy enough to access/use).

2. However, a greater proportion of parents/guardians overall think that these **safety measures need to be made easier for children to access/use** (41%, compared to 18% who think they are easy enough already).

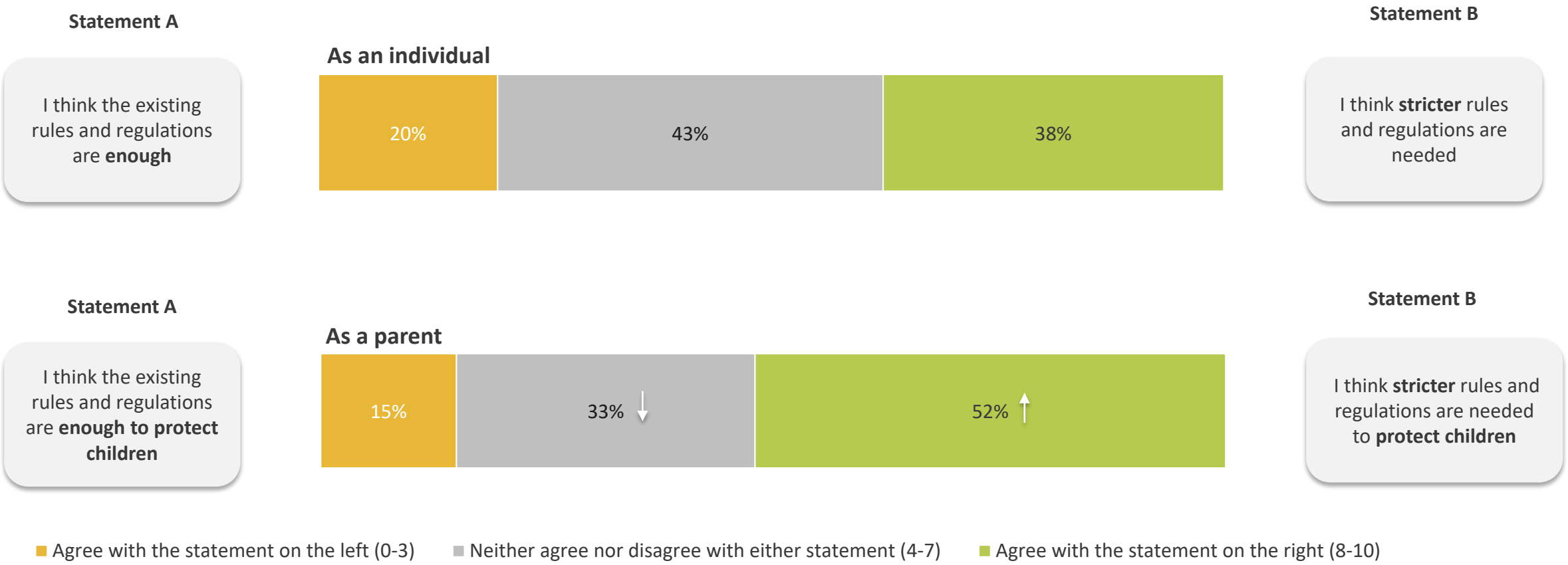
3. Two in five parents/guardians (38%) think that stricter rules/regulations are needed on VSPs, although a similar proportion are on the fence (43%). However, when it comes to children, fewer **parents/guardians are unsure (33%) and significantly more call for stricter measures (52%).**

4. Parents/guardians tend to think that VSPs should be responsible for protecting both internet users generally (52%) and children (47%); however, **they are more likely to be undecided on where the onus of protection lies in the case of children (38%) than in the case of internet users generally (31%)**.

* Points above refer to new questions in Wave 2 that compare attitudes towards online safety from the perspective of parents/guardians and their personal internet usage versus the usage of their children. As these are new questions this wave there is no historical data to which to compare.

Parents and guardians are more likely to think that stricter rules/regulations are needed on VSPs in the context of protecting children, compared to when they think about VSPs in general

Views on safety measures amongst those responsible for children in their household :



Source: VSP tracker Wave 2 (March '22)

Q12. 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. 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

N.B- not asked in Wave 1

Parents and guardians are split on whether reporting/flagging mechanisms on VSPs are easy for them to use; however, there is a greater call for access and use to be made easier for children

Views on safety measures amongst those responsible for children in their household :

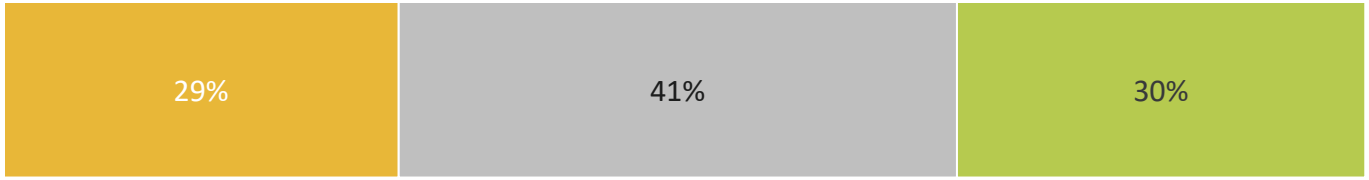
Statement A

It is **easy** to access/ use flagging and reporting mechanisms on websites and apps

Statement B

Flagging and reporting mechanisms on websites and apps need to be **made easier to find**

As an individual



Statement A

Flagging and reporting mechanisms on websites or apps are **easy** for children to use/ access

Statement B

Flagging and reporting mechanisms on websites or apps should **be made easier** for children to use/ access

As a parent

■ 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)

↑↓ Significantly higher/lower than statement A at 95% confidence

Source: VSP tracker Wave 2 (March '22)

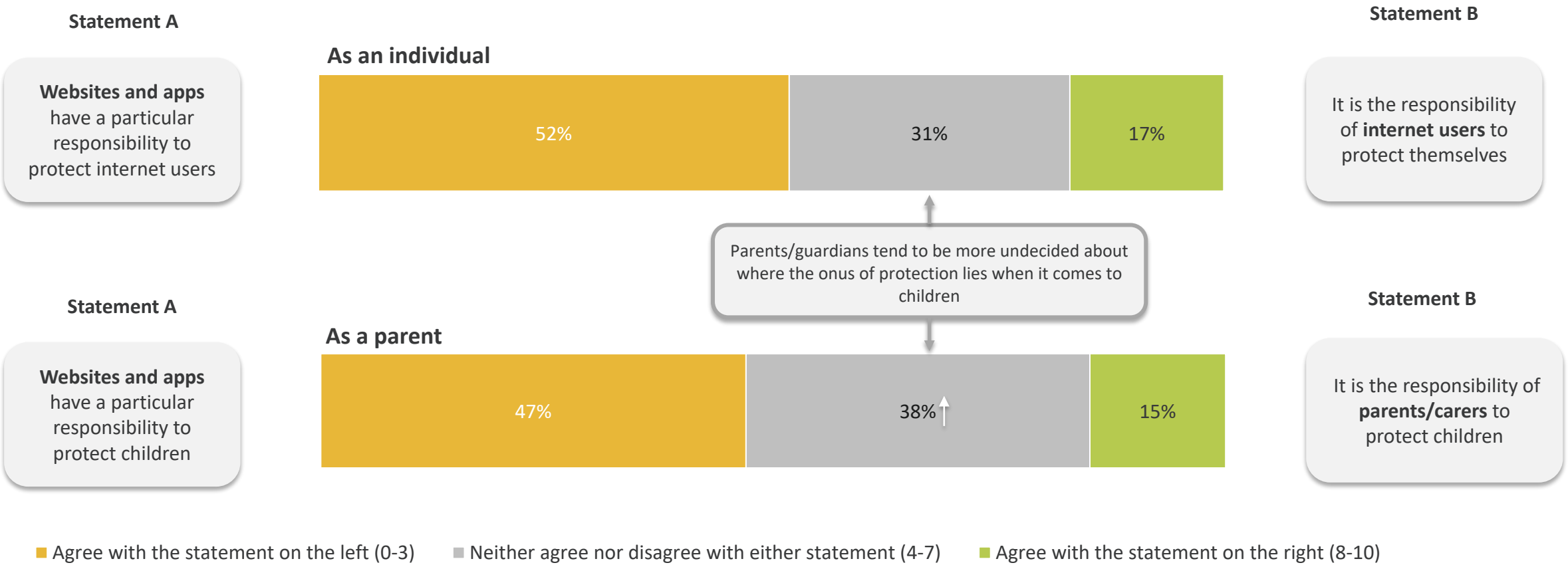
Q12b. On a scale of 0-10, please indicate where your own view lies when it comes to rules or safety measures on these sites or apps.

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

N.B- not asked in Wave 1

Parents/guardians largely believe that VSPs should be responsible for protecting internet users and children; only a small proportion consider themselves responsible for protecting their child

Views on safety measures amongst those responsible for children in their household :



Source: VSP tracker Wave 2 (March '22)

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. 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

N.B- not asked in Wave 1