Online Nation

2023 Report

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Annex

Overview

Online use in the UK

UK adult internet users spent on average 3 hours 41 minutes online per day in May 2023

In total, 47.9 million UK adults accessed the internet on smartphones, tablets and computers in May 2023, spending an average of 3 hours 41 minutes a day online, eight minutes more than in May 2022. Young adults continue to spend the most time online, with 18-24-year-olds spending a daily average of 4 hours 36 minutes, and the 65+ group spending the least time (2 hours 46 minutes).[1]

Seven per cent of UK individuals aged 16+ don't have access to the internet at home, with a quarter of these citing affordability as a reason

While a large majority of people aged 16+ do have access to the internet at home, 7% did not have access in 2023, with the figure even higher (18%) among people aged 65+. Among those who did not have internet at home, a perceived lack of need or interest (65%) remained their top reason. However, a quarter (26%) cited reasons related to cost.

Alphabet- and Meta-owned sites and apps remain the most visited

Alphabet, which owns Google and YouTube, remains the organisation whose sites and apps are most visited by UK online adults (99%), followed by Meta (the owner of Facebook, WhatsApp and Instagram) (97%) and in third place, Amazon (89%) in May 2023.

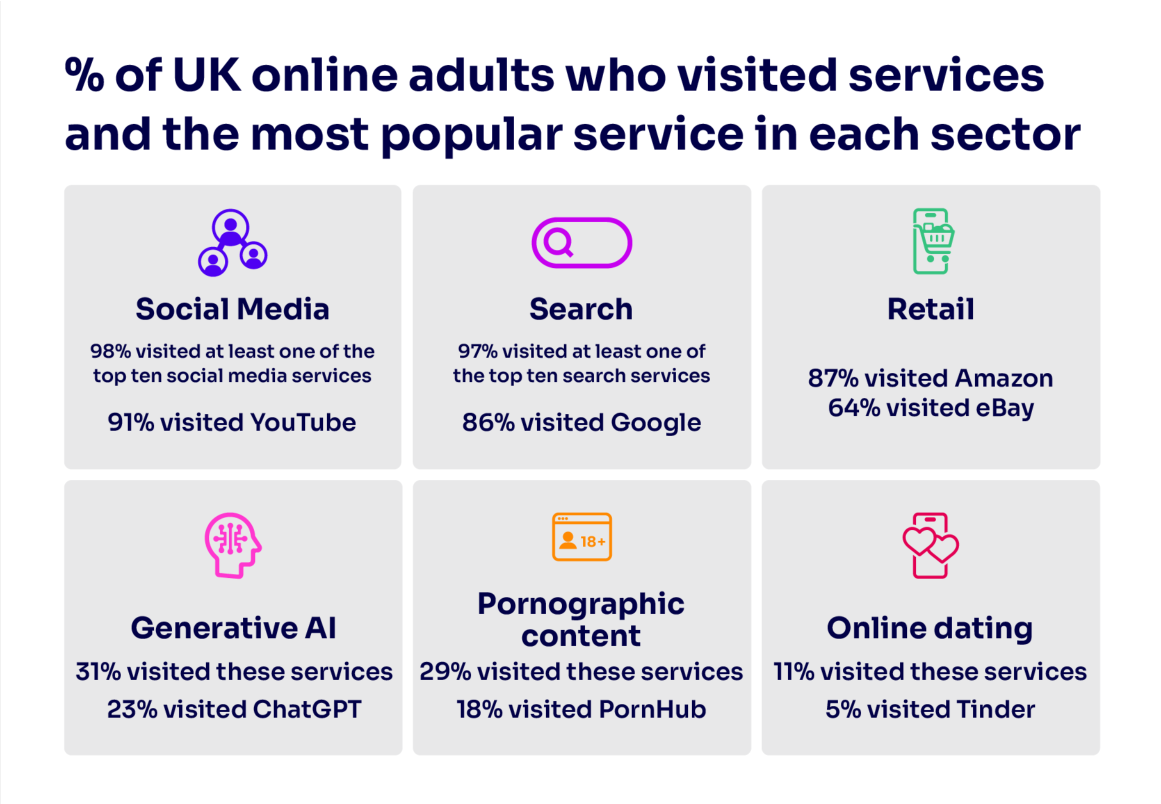
Our Children's Online Passive Measurement pilot study among a small sample of 162 8-12-year-olds indicates that, like adults, nearly all online children aged 8-12 visited Alphabet during our fieldwork period (98%). As with adults, Meta was the second-most-visited organisation, with an online reach of 85%. Roblox was the only organisation in the top five for the children aged 8-12 that did not appear in the top five for those aged 15+.

UK adults used an average of 36 apps on smartphone in May 2023

Fifty-one per cent of people aged 16+ who use a smartphone use an Apple smartphone, while 46% use an Android. 25-44-year-olds used the most apps compared to other age groups, using an average of 42 apps in May 2023, with 55+ using the least (32).

Six of the ten most-visited apps on Android phones by UK adults are owned by Alphabet (which owns the Android operating system), compared to two in ten Apple-owned apps on iPhones. Alphabet-owned apps are the most-visited on Android smartphones, Meta-owned apps on iPhones. Meta-owned WhatsApp, Facebook, Facebook Messenger and Instagram are the top four most-visited smartphone apps on an average day in May 2023.

[1] Time spent online includes personal use and in some instances those who use their device for work/education too.



Spotlights: online sectors

Search

Half of UK online adults visited Google Search on an average day in May 2023

Google remains the highest-reaching search engine, reaching 86% of UK online adults in May 2023, with half (51%) visiting the search engine on an average day. Bing.com, the second highest reaching search engine, saw its UK online adult reach rise from 33% in January 2023 to 46% in May 2023, following the introduction of Bing AI in February 2023.

Generative artificial intelligence

Three in ten UK internet users aged 16+ said that they used a generative AI tool

Generative artificial intelligence (generative AI) broadly refers to algorithms that can create new content in response to a prompt, including text, images, video and code outputs. ChatGPT is the most widely used service; our survey conducted in June 2023 found that 23% of internet users aged 16+ said they had used it.

Snapchat My AI is the generative AI tool most widely used by online children

Four in five (79%) online teenagers and two in five (40%) online 7-12s had used any of the following generative AI tools: ChatGPT, Snapchat My AI, Midjourney or DALL-E. Half of UK online 7-17-year-olds said in June 2023 that they had used Snapchat My AI, making it the most popular generative AI tool among children.

Social media

YouTube is the most popular social media service among adults, taking the top spot from Facebook

YouTube was the highest-reaching social media service among UK online adults using smartphones, tablets or computers, with more than nine in ten (91.0%) visiting it in May 2023. Facebook (including Messenger) had been the highest-reaching social media service, reaching 93.8% of UK online adults in May 2022, but in May 2023 it had 1.4 million fewer adult visitors, maintaining a high overall UK online adult reach (90.7%) but dropping to second place.

By time spent, Snapchat and TikTok are the leading services among young adults

In May 2023 the 3.8 million UK 18-24-year-old TikTok visitors spent an average 55 minutes on TikTok per day (May 2022: 3.5 million, 53 minutes), while the 3.8 million 18-24-year-old Snapchat visitors spent 58 minutes per day (May 2022: 3.5 million, 42 minutes).

Nearly a quarter of UK online individuals aged 16+ used Instagram's microblogging service Threads

In the UK by the start of September, less than three months after its launch, just under a quarter (23%) of online users aged 16+ said they had ever used Threads – significantly lower than those reporting to have ever used X (formerly Twitter) (52%). Of those who had used Threads, one-third (31%) reported posting content on the service in the past month. Of those who had ever used X, 29% said they had posted content in the past month.

Services for pornographic content

Twenty-nine per cent of UK online adults accessed services for pornographic content

In May 2023 just under a third (13.8 million) of UK online adults accessed a pornographic content service: 10.1 million UK men visited an online service for pornographic content, making up 73% of adult visitors to these services, with women making up the remaining 27% of visitors (3.7 million). Pornhub is the highest-reaching pornographic content service, reaching 18% (8.4 million) of UK online adults in May 2023.

Gaming

Thirty-eight per cent of UK adults aged 16+ play games online, as do 57% of UK children aged 3-15

UK gamers reported that the time they spent gaming either on- or offline declined from an average of 8 hours 16 minutes a week in Q2 2022 to 7 hours 11 minutes in Q2 2023. Thirty-nine per cent of UK households have at least one games console, and 23% of households have a digital-only games console. The top title played by Xbox or PlayStation console gamers in August 2023 was *Fortnite*, played by 2.88 million UK gamers, followed by *FIFA 23* (2.86 million), *Grand Theft Auto V* (2.22 million) and *Minecraft* (1.68 million).

The online experiences of adults and children

Attitudes to being online are complex and often ambivalent

Adults recognise the benefits of being online at a personal level, but less so for society overall. When asked to consider the impact of being online, 71% of adult internet users agreed that for them *personally* the benefits of being online outweighed the risks. Just 6% disagreed, with nearly a quarter unsure (23%). When considering the impact of the internet on society, the picture changes somewhat; 40% of adult internet users feel that it is good for society, a minority (15%) disagree, and 45% say they feel neutral about it.

Nearly half of 13-17s think that being online is good for their mental health

Children and their parents tend to agree that being online provides children with opportunities and benefits. Going online can help with schoolwork/homework (81% children, 84% parents), building or maintaining friendships (68% children, 65% parents), and finding useful information about personal issues (60% children, 50% parents).

Teenagers are also more likely than adults to recognise the benefits of being online for their mental health and general wellbeing: 48% agree that being online has a positive effect on their mental health, compared to 31% of adults, with just 13% of 13-17s disagreeing.

Misinformation was the most prevalent potential harm encountered by adults

Although being online provides both adults and children with many benefits, the online environment also has the potential to expose internet users to harm.

Misinformation is the potential harm most often encountered by adults, with nearly two in five (39%) seeing or experiencing it in the past four weeks. In terms of the type of misinformation seen, a quarter said that this related to political or electoral content, followed by content which discriminated on the grounds of a protected characteristic (16%), and financial misinformation (11%).

Another potential harm with high levels of claimed experience was hate speech. Twenty-three per cent of adults said in the past four weeks they had encountered ‘hateful, offensive or discriminatory content that targeted a group or person based on specific characteristics like race, religion, disability, sexuality or gender identity, e.g., hate speech'.

More than a fifth of children aged 8-17 have an adult online profile

Ofcom's user age research suggests that 22% of 8–17-year-olds (and 20% of 8-15s) with a social media profile on at least one of the platforms listed in our study, have a user/profile age of at least 18, meaning they are at greater risk of seeing adult content. The research also estimates that a third (34%) of children aged 8-15 with a social media profile on at least one of the platforms listed, have a user/profile age of at least 16.

The impact of encountering a potential harm online varies by the type of content encountered

While exposure to any type of potentially harmful content or behaviour may negatively affect users' online experience, our research shows that not all potentially harmful online content or behaviour has the same degree of negative impact. '*Content depicting animal cruelty'* provoked a high level of negative impact among users aged 13+ who had encountered it most recently (83%). However, this content is encountered relatively rarely by UK internet users (3% had encountered it recently). '*Hateful, offensive or discriminatory content*' (61%) also provokes high levels of negative impact among those who had encountered it most recently, and sits within the top ten potential harms encountered, for both adults and children.

Over a third of internet users encountered their most recent harm when scrolling through their feed or 'for you' page.

Potential harms online can be encountered in different ways. The most common exposure is when internet users aged 13+ scroll through their feed or 'for you' page, with 34% of internet users encountering their most recent potential harm this way. Internet users are least likely to say they were exposed to a potential harm when watching livestreamed content (2%) or using the search function (3%).

Awareness of reporting tools is inconsistent across internet users

Ofcom's Video-Sharing Platforms (VSP) Tracker suggests that less than half of VSP users (42%) are aware of the rules and safety measures put in place by VSPs, rising to 88% when a range of safety measures are prompted within the questionnaire, and being higher for children (94%). The safety measures that respondents are most aware of are: 'reporting buttons' (62%), 'a notice that flags content as inappropriate or harmful' (61%), 'parental controls' (60%) and 'a tool to hide content that you do not wish to see again' (60%).

Teens are least likely to take action on potentially harmful content

Sixty per cent of adults said they took some form of action after encountering their most recent potentially harmful experience online, compared to just over half of 13-17s (51%). Actions taken ranged from disengaging with a platform to more proactive reporting behaviour such as clicking the flag, report or junk button. Users who said their most recent experience 'really bothered or extremely offended' them were more likely to act than those 'slightly bothered or offended' 77% vs 63%).

The 13-17 age group were more likely than adults to tell 'a friend or family member' about an upsetting or scary online experience (18% vs 6%).

Over a third of those reporting harmful content or behaviour are dissatisfied with the response

More than half of those who reported or complained about potentially harmful content or behaviour online said that nothing happened as a result of this action (53%). Almost a fifth said that the content had been removed (18%), 7% said they had received a written response, and 3% had been asked to provide further information. Satisfaction levels with the reporting or complaints process varied for UK internet users, with 32% feeling satisfied with their experience and 36% feeling dissatisfied.

Most parents have controls in place to manage the content their children see online

Children and their parents use a variety of strategies to help ensure a safe experience online. Ofcom research found that seven in ten parents of children aged 3-17 said they had a form of technical control in place to manage their child's access to content online; the most-used technical controls used were those pre-built into the device by the manufacturer (34%) such as Windows, Apple or Xbox. More than nine in ten children aged 8-17 had spoken to someone about how to use the internet safely (91%); 88% had done so with a family member and 76% had done so with a teacher.

Introduction

This report sets out an overview of the UK online landscape in 2023, exploring children's and adults' use of and experiences on online services.

In the Online Landscape and Online Sectors chapters we include measurement data that is representative of UK online adults aged 18+, provided by Ipsos iris, the UKOM-accredited online audience measurement currency. We use this data to provide a snapshot of online use in May 2023, to compare year-on-year trends since May 2022, and to explore monthly trends where new services have entered the market. The youngest age cohort measured by Ipsos iris is 15-17-year-olds; this cohort of children is also explored.

New children's online passive measurement pilot

Additionally, this year we commissioned Ipsos to carry out a pilot study that passively measured the internet use of children aged 8-12 across smartphones, tablets and computers. Passive measurement involves devices being measured where the child's parent/guardian informed us during recruitment that the child used the device at least once a week. Devices used at school and not available to also use at home will therefore not be captured. A passive monitoring app /VPN tracker was installed on the devices used by the child, which collected visits to websites or apps and the time spent on them.

The purpose of the study was to test whether passive methodology can, in the future, deliver robust metrics of children's online use. The study was therefore conducted among a small sample of 162 8-12-year-olds; it only reflects the online use of the children in the study and may not be representative of all UK children aged 8-12.

The pilot study undertook a two-phase approach with a soft launch among 17 children whose online use was measured over a three-week period in January – February 2023; following the success of phase 1 we scaled up the sample, measuring 145 children for four weeks during April-July 2023. Exact dates varied by participant, but all fieldwork fell within the dates 12 January – 26 February (phase 1) and 11 April – 18 July (phase 2).

The results from both phases were combined to provide the unweighted data presented in this report, therefore the data should not be considered as representative [see methodology for further details on the research].

We concluded from this pilot study that children's online use can be passively measured. Our intention going forward is to develop Children's online passive measurement in the future, covering an increase in sample size, considering waves for tracking and adjusting the sample and weighting to be nationally representative.

These chapters also include data from Ofcom's Technology Tracker, on people aged 16+.

In the Online Experiences chapter we report on data from multiple sources, but primarily from Ofcom's Online Experiences Tracker (OET) and our VSP (Video Sharing Platforms) Tracker. Both are online tracking studies among UK internet users aged 13+, and this chapter draws on the fourth wave of each study; the most recent. Unless referenced otherwise, the figures cited throughout this chapter will be from wave 4 OET data.

Other Ofcom research is also referenced in this chapter, including Ofcom's Adults' media use and attitudes report, our Children and parents: media use and attitudes report, research into online communications among children, ad-hoc research done through Ofcom's online research panel, and our first randomised control trial.

The chapter also uses data from platforms' own transparency reports.

This report does not explicitly set out to cover services that may be in scope of the Online Safety Act or relate to issues relevant to Ofcom's duties under the Act.

The online landscape

Introduction

This chapter sets out an overview of the UK online landscape in 2023. It explores children's and adults' behaviour and use of the highest-reaching online services, and the services we spend the most time on.

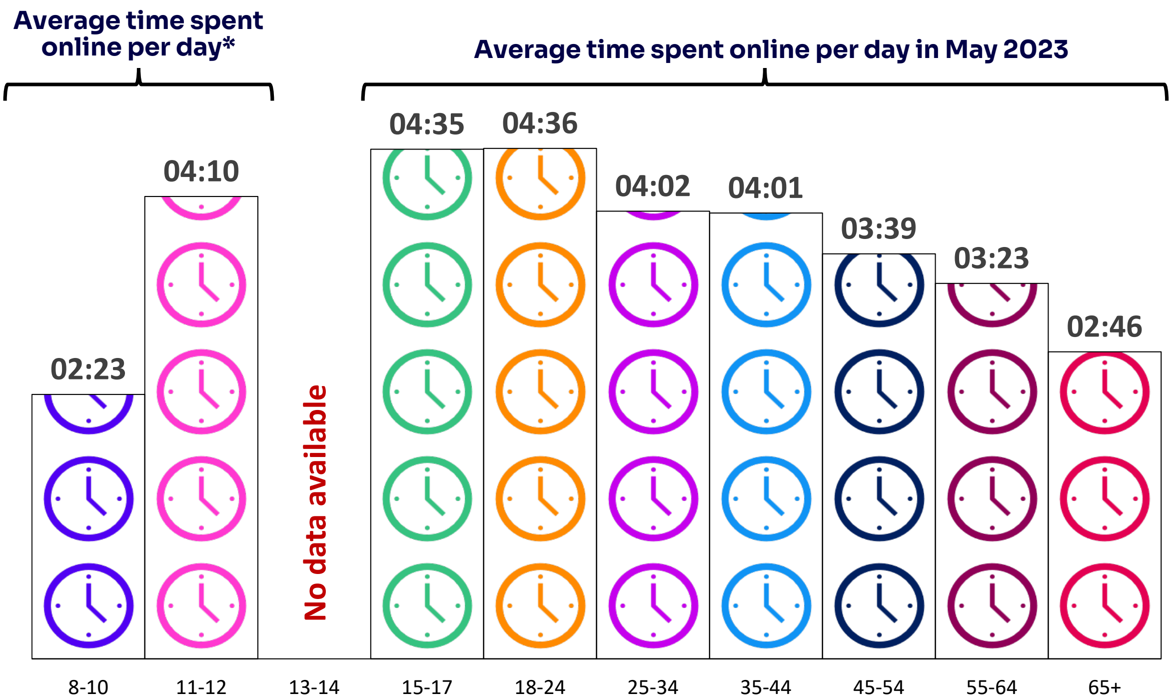
Key metrics

Figure 1: Percentage of UK individuals aged 16+ with access to the internet at home, by year: 2020-2023

Year	UK households with access to the internet	Have access and use at home	Have access but do not use at home
2023	**92%**	**90%**	**2%**
2022	**93%**	**92%**	**1%**
2020	**89%**	**87%**	**2%**

Source: Ofcom Technology Tracker 2020, 2022 & 2023. QE1: do you or does anyone in your household have access to the internet at HOME (via any device, e.g. PC, mobile phone etc), and if so, do you personally use the internet at home? Base: all respondents aged 16+. Due to a change in methodology 2021 data is not comparable and therefore has not been included.

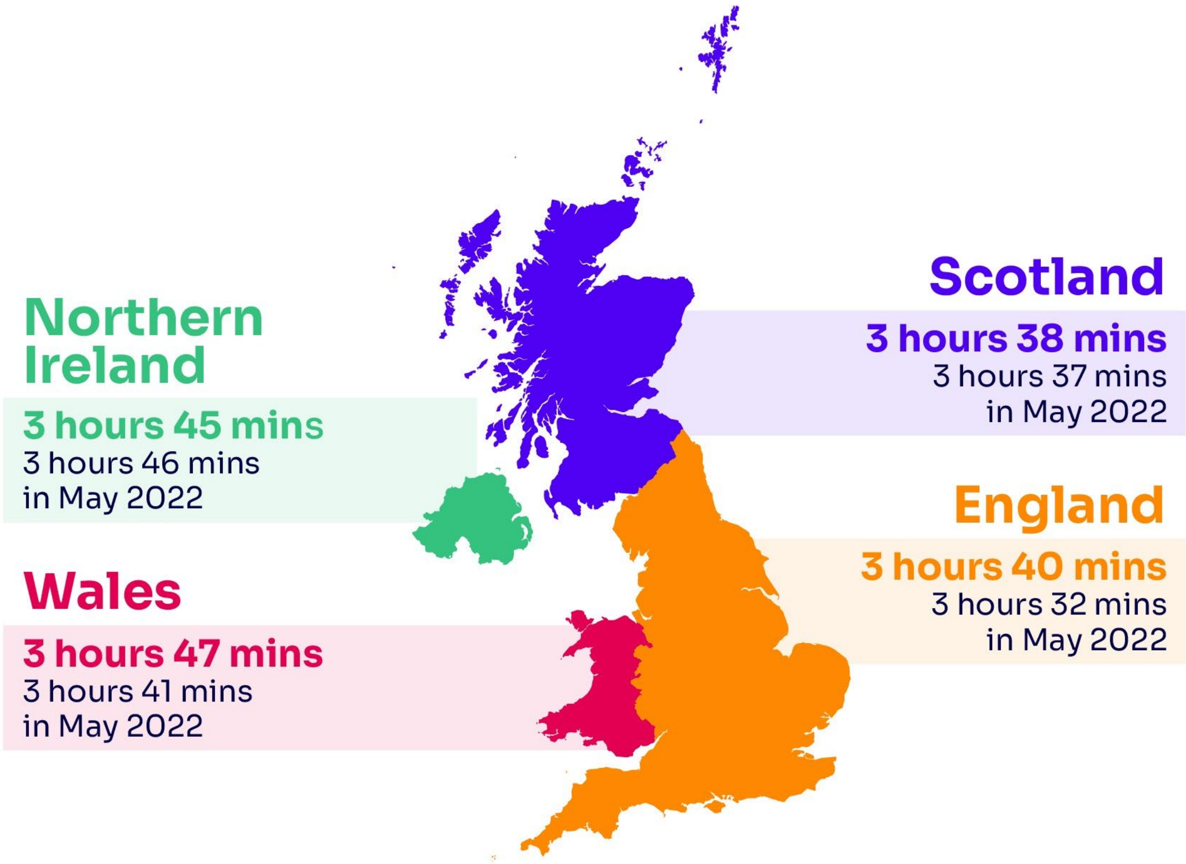
Figure 2: Average time spent online on smartphones, tablets and computers, per UK visitor per day: hours:minutes



*Source: Ofcom Ipsos children's passive measurement study, 2023, age: 8-12, UK. Base: 162. *Time spent data based on 17 children measured over three-week period in January-February 2023 combined with results from*

145 children who were measured for four weeks during April-July 2023. Due to low base size data should be treated as indicative only and not representative. / Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 15+, UK. Note: custom data supplied by Ipsos. Time spent online includes personal use and in some instances those who use their device for work too.

Figure 3: Average time spent online on computers, tablets and smartphones, per UK adult visitor per day, by nation: May 2023



Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK. Note: Time spent online includes personal use and in some instances those who use their device for work/education too.

Take-up and use

Internet take-up and use

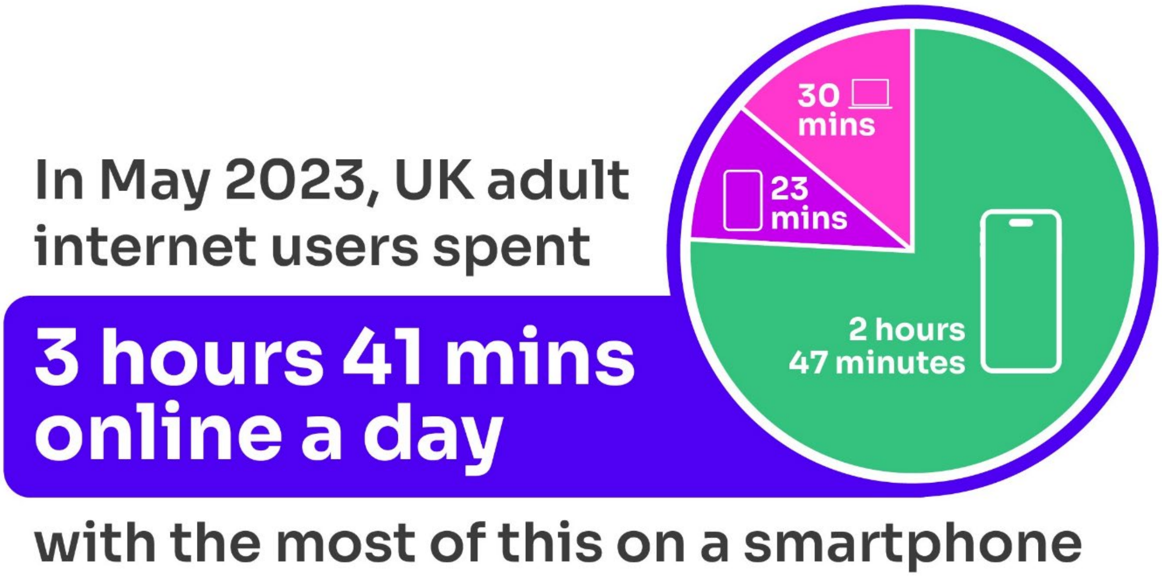
Adults spent an average of 3 hours 41 minutes a day online in May 2023, a modest increase since May 2022

Data from Ipsos iris shows that 47.9 million UK adults accessed the internet across smartphones, tablets and computers in May 2023 (our sample month), spending an average of 3 hours 41 minutes a day online, a modest increase of 8 minutes year on year (May 2022: 3 hours 33 minutes). Young adults continue to spend the most time online, with 18-24-year-olds spending a daily average of 4 hours 36 minutes, and the 65+ group spending the least time (2 hours 46 minutes). Women continue to spend more time online (3 hours 58 minutes, up 12 minutes on May 2022) than men (3 hours 23 minutes, up by 3 minutes). Online adults in Wales spent the most time compared to the other UK nations (3 hours 47 minutes), while those in Scotland spent the least (3 hours 38 minutes) (see Figure 3 above).[2]

Our children's online passive measurement research, which measured online use among 162 8-12-year-old children in the UK, found that on average they spent 3 hours 5 minutes per day accessing the internet across smartphones, tablets and computers. Time spent online among children increases with age, with 8–10-year-olds spending on average 2 hours 23 minutes per day and 11-12s spending 4 hours 10 minutes per day.[3] Among older children, Ipsos iris found 15-17 year olds spent an average 4 hours 35 minutes online per day in May 2023.[4]

Three-quarters of the time spent online per day in May 2023 by adults was on smartphones

Figure 4: Average daily time spent online by adults, by device (hours:minutes): May 2023



Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK. Note: Custom data supplied by Ipsos. See Communications Market Report 2023: Online interactive data for comparison to May 2022 data.

In May 2023, 76% (2 hours 47 minutes) of the time spent online per day by UK online adults was on a smartphone, 20 minutes more than in May 2022 (when 69% was on smartphones). Time spent on computers and tablets declined, with UK adults spending 30 minutes on computers (down from 38 minutes) and 23 minutes (down from 28 minutes) on tablets per day in May 2023. The 25-34-year-olds spent the largest proportion of their online time on smartphones (87%). Those aged 55+ spent the smallest proportion on smartphones, although this still accounted for the majority of their online time (60% on smartphones, 20% on computers and 20% on tablets).

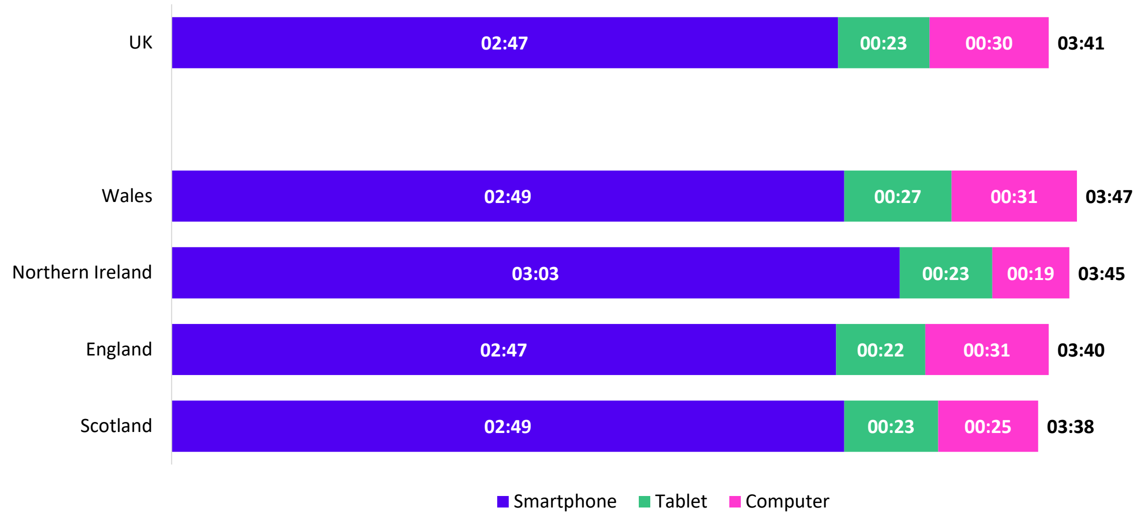
[2] Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 & May 2023, age: 18+, UK. Note: Custom data supplied by Ipsos.

[3] Ofcom Ipsos Children's Online Passive Measurement 2023, age: 8-12, UK. Base: 162. Time spent based on seventeen children online use over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Exact dates varied by participant, but all fieldwork fell within the dates 12 January – 26 February (phase 1) and 11 April – 18 July (phase 2).

[4] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.

Time spent online on apps, versus visiting websites, increased from 71% in May 2022 to 77% in May 2023, and 89% of the time spent on smartphones by adults was via apps.[5]

Figure 5: Average daily time spent online by adults, by device and UK nation (hours:minutes): May 2023



Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK. Note: Custom data supplied by Ipsos. See interactive report for comparison to May 2022 data.

One in 14 people do not have access to the internet at home

Seven per cent of UK individuals aged 16+ do not have access to the internet at home in 2023[6] (2022 also 7%[7]). Eighteen per cent of those aged 65+ do not have home internet access, while 25-34-year-olds are the least likely not to have home internet access, at 2%. Two percent of households with children said they do not have home internet access.[8] Ninety-four per cent of online households receive their internet via fixed broadband, 4% of online households have access to the internet at home only via their mobile network, while 2% stated they didn't know.[9] Fifteen per cent of the UK individuals aged 16+ who do not have access to the internet at home said they were likely to get access to the internet at home in the next 12 months, while 71% said they were unlikely to do so.[10]

Figure 6: UK individuals aged 16+, location of internet access

Year	Total at home or elsewhere	At home and elsewhere	At home only	Elsewhere only
2023	**95%**	**69%**	**23%**	**2%**

Source: Ofcom Technology Tracker 2023. Base: all respondents aged 16+.

[5] Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK. Note: Custom data supplied by Ipsos.
[6] Ofcom Technology Tracker 2023. 1% of individuals cited 'don't know' as to whether they had internet access at home.
[7] Ofcom Technology Tracker 2022.
[8] Ofcom Technology Tracker 2023. In this case children are those aged 0-18 years old. 96% of households with children have internet access at home.
[9] Ofcom Technology Tracker 2023.
[10] Ofcom Technology Tracker 2023. QE15. How likely are you to get internet access at home in the next 12 months? Base: Those without internet access at home.

Affordability was cited by a quarter of those who do not have internet access at home

Among people without internet at home, a perceived lack of need or interest (65%) remained the main reason for not having it. However, a quarter (26%) cited reasons related to cost – 23% cited costs related specifically to broadband, and those in socio-economic group DE were more likely to cite this as a reason (31%). High broadband set-up cost (18%) was the top reason relating to cost, followed by the monthly cost of a fixed broadband service (13%). Other top reasons unrelated to cost included 'using the internet is too complicated' (16%) and 'someone else can go on the internet for me if necessary' (16%).[11] Ofcom estimates that in October 2023 about 2.4 million (+/- 500,000) UK households with fixed broadband found it difficult to afford their fixed broadband service and 2.4 million (+/- 500,000) UK households with a mobile phone had difficulty affording their mobile phone service.[12] This suggests that a number of households in the UK which currently have access to the internet are at risk of having to modify or even cancel their service, or reduce household spending elsewhere to be able to afford it.

Figure 7: Reasons related to cost for not getting internet access at home in the next 12 months

	Age			Socio-economic group
Reason	**16+**	**16-74**	**75+**	**DE**
Any reason related to cost	26%	35%	16%	34%
Broadband set-up costs	18%	24%	11%	26%
Monthly cost of fixed broadband	13%	15%	10%	18%
Cost of laptop/desktop or tablet	11%	13%	10%	17%
Cost of mobile phone	10%	10%	10%	13%
Monthly cost of mobile phone service	7%	6%	7%	10%

Source: Ofcom Technology Tracker 2023. QE16. Which of these are reasons why you are unlikely to get internet access at home in the next 12 months? Base: Where unlikely to get internet in next 12 months. Other socio-economic groups and smaller range age groups cannot be displayed due to low base size.

A quarter of UK internet users have used a VPN

A virtual private network (VPN) can be used to protect users by encrypting their data and masking their IP addresses. This can hide their browsing activity, identity, and location, allowing for greater privacy. Using VPN can provide a more secure online experience. Businesses may typically use a VPN to give remote employees access to internal applications and data, or to create a single shared network between multiple office locations. Twenty-six per cent of internet users aged 16+ have used a VPN for any reason. The most common reason was for work (19%), some cited education (5%), and 10% cited other reasons for their use of a VPN.[13]

[11] Ofcom Technology Tracker 2023.
[12] Ofcom Affordability of Communications Services tracker, November 2023.
[13] Ofcom Technology Tracker 2023. QE11. Do you ever connect to the internet using a VPN (virtual private network)? Base: Where use internet at home or elsewhere. Note: Respondents could select more than one reason for using VPN.

Use of internet services

Top online companies

Alphabet- and Meta-owned sites and apps remain the most-visited in the UK

Alphabet, which owns Google and YouTube, remains the organisation[14] whose sites and apps are most visited by UK adults, followed by Meta (the owner of Facebook, WhatsApp and Instagram) and Amazon. Alphabet- and Meta-owned sites and apps have near-universal use among UK online adults, and the Amazon-owned website or apps were visited by at least 88% of online adults in all four UK nations in May 2023.[15]

The BBC is the highest-ranking UK-based organisation, at 77% online adult reach in the UK, and in England (77%), Scotland (77%), and Northern Ireland (84%) in May 2023. In Wales, the newspaper group Reach PLC – publisher of the Mirror, Daily Express and Daily Star, as well as Welsh national titles Wales Online and North Wales Live – and BBC were the UK-based organisations with the highest reach, at 80% and 79% respectively. Visits to UK government sites and apps have decreased over the past two years: 59% of UK adults accessed an online government site or app in May 2023 (ranked 11th), compared to 62% in May 2022 (ranked tenth) and 67% in May 2021 (ranked eighth). They appear in the top ten in Wales (ranked tenth, 59% reach) and Northern Ireland (ranked eighth, 66% reach) only. Additionally, UK online adults were more likely to access NHS online in May 2022 (60%) than in May 2023 (51%).[16] This may be due to the decrease in Covid-19 cases.

Alphabet and Meta are the top two most-visited online organisations for all ages; 99% of each age group visited Alphabet-owned services and at least 96% across all age groups visited Meta-owned services in May 2023. Among adults, social media organisations Bytedance (which owns TikTok), with 72% reach, Snap, with 71%, and X (formerly Twitter),[17] with 61%, only appear in the top ten for adults aged 18-24. The music streaming service Spotify appears in the top ten for adults aged under 35, (ranked eighth for 18-24s, at 69% reach, and tenth for 25-34s, at 61%).

The likelihood of visiting organisations' websites or apps that include news services increases with age: only the BBC (67% reach) is in the top ten for 18-24 year olds; both the BBC (70%) and Reach Plc (68%) are in the top ten for 25-34 year olds; the three news services the BBC (77%), Reach Plc (75%), and News UK sites (64%) are in the top ten for 35-44-year-olds; while four news services appear in the top ten for those aged 45+. UK Government sites appear in the top ten services for 25-44s (62% reach for 25-34s and 63% for 35-44s).[18]

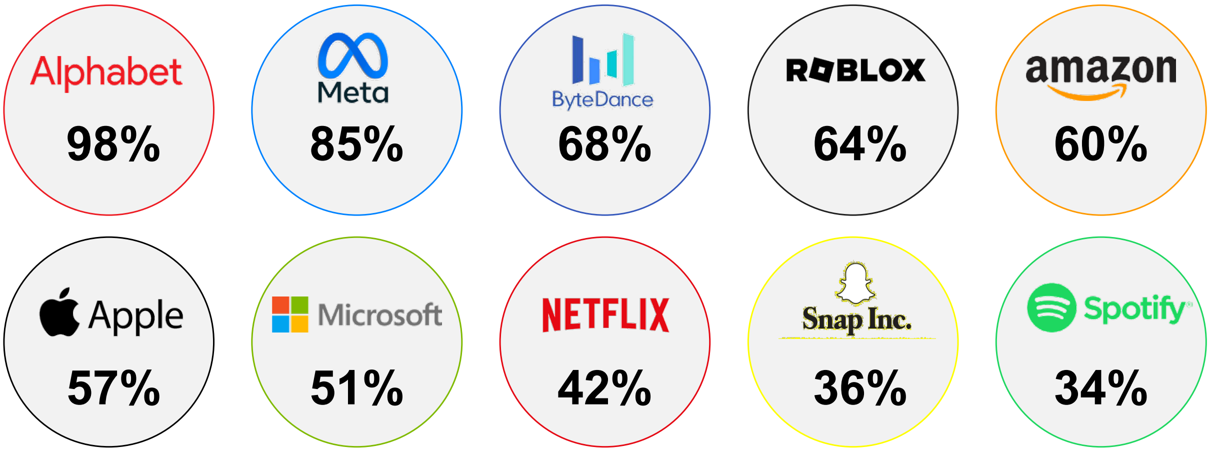
Roblox was the only organisation in the top five for children aged 8-12 which did not appear in the top five for 15-17s or for young adults

Our children's online passive measurement pilot study indicates that like adults, nearly all the 162 online children aged 8-12 visited Alphabet during our fieldwork period (98%). As with adults, Meta

[14] 'Organisations' are the parent companies of the groups of websites and apps; for instance, Alphabet organisations include Google Search, Gmail and YouTube; Meta includes Facebook and Messenger, Instagram and WhatsApp.
[15] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.
[16] Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK.
[17] Twitter rebranded to X on 24th July 2023.
[18] Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK.

was the second-most-visited organisation, with an online reach of 85%. Bytedance inc. (which owns TikTok) was the third-most-visited site and app with 68% reach, followed by Roblox (64%) and Amazon (60%). Next most visited site and apps were Apple (57%) and Microsoft (51%) sites and apps. Netflix (42%),[19] Snapchat (36%) and Spotify (34%) made up the rest of the top ten most-visited organisations among 8-12-year-olds.[20]

Figure 8: Top ten organisations visited by UK online children aged 8-12 on smartphones, tablets or computers



Source: Ofcom Ipsos Children's Online Passive Measurement 2023, age: 8-12, UK. Base: 162. Reach based on seventeen children visiting organisation at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative. See Methodology for further details. Netflix is understated as it does not cover TV set use. Spotify is understated as it only covers foreground use and smart devices are not included.

[19] Netflix is likely significantly understated as it does not cover TV set use.
[20] Ofcom Ipsos Children's Online Passive Measurement 2023, age: 8-12, UK. Base: 162. Reach based on seventeen children visiting organisation at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Due to low base size data should be treated as indicative only and not representative.

Figure 9: Top ten organisations visited by UK online adults on smartphones, tablets or computers, by nation: May 2023

	UK		England		Scotland		Wales		Northern Ireland	
Rank	**Organisation**	**Reach**	**Organisation**	**Reach**	**Organisation**	**Reach**	**Organisation**	**Reach**	**Organisation**	**Reach**
1	Alphabet	99%	Alphabet	99%	Alphabet	100%	Alphabet	99%	Alphabet	99%
2	Meta	97%	Meta	96%	Meta	97%	Meta	98%	Meta	99%
3	Amazon Inc	89%	Amazon Inc	89%	Amazon Inc	88%	Amazon Inc	90%	Amazon Inc	94%
4	Microsoft Corporation	87%	Microsoft Corporation	87%	Microsoft Corporation	84%	Microsoft Corporation	84%	Microsoft Corporation	88%
5	BBC Corporation	77%	BBC Corporation	77%	BBC Corporation	77%	Reach Plc	80%	BBC Corporation	84%
6	Reach Plc	72%	Reach Plc	72%	Reach Plc	72%	BBC Corporation	79%	Reach Plc	78%
7	eBay Inc	64%	eBay Inc	64%	Apple Inc	65%	eBay Inc	64%	PayPal Inc	67%
8	Apple Inc	63%	Apple Inc	63%	PayPal Inc	62%	Mail Metro Media	62%	UK Government	66%
9	PayPal Inc	62%	PayPal Inc	62%	News UK Sites	61%	PayPal Inc	60%	Mail Metro Media	63%
10	Mail Metro Media	60%	Mail Metro Media	60%	eBay Inc	60%	UK Government	59%	News UK Sites	62%

Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, Ranking report, age: 18+, UK, England, Scotland, Wales, and Northern Ireland. Note: Each organisation has been allocated a colour.

Figure 10: Top ten organisations visited by UK online individuals on smartphones, tablets or computers , by age group: May 2023

Age	15-17		18-24		25-34		35-44		45-54		55-64		65+	
	Organisation	Reach	Organisation	Reach	Organisation	Reach	Organisation	Reach	Organisation	Reach	Organisation	Reach	Organisation	Reach
1	Alphabet	99%	Alphabet	99%	Alphabet	99%	Alphabet	99%	Alphabet	99%	Alphabet	99%	Alphabet	99%
2	Meta	95%	Meta	96%	Meta	96%	Meta	97%	Meta	97%	Meta	97%	Meta	96%
3	Microsoft Corporation	90%	Microsoft Corporation	90%	Microsoft Corporation	88%	Amazon Inc	91%	Amazon Inc	92%	Amazon Inc	90%	Amazon Inc	86%
4	Amazon Inc	87%	Amazon Inc	88%	Amazon Inc	87%	Microsoft Corporation	90%	Microsoft Corporation	86%	Microsoft Corporation	86%	Microsoft Corporation	82%
5	Bytedance Inc.	72%	Bytedance Inc.	72%	BBC Corporation	70%	BBC Corporation	77%	BBC Corporation	81%	BBC Corporation	84%	BBC Corporation	81%
6	Snap Inc	71%	Snap Inc	71%	Reach Plc	68%	Reach Plc	75%	Reach Plc	77%	Reach Plc	78%	Reach Plc	75%
7	Apple Inc	70%	Apple Inc	70%	PayPal Inc	64%	eBay Inc	70%	eBay Inc	70%	eBay Inc	69%	Mail Metro Media	62%
8	Spotify Music	69%	Spotify Music	69%	Apple Inc	62%	PayPal Inc	70%	PayPal Inc	68%	Mail Metro Media	65%	Apple Inc	58%
9	BBC Corporation	66%	BBC Corporation	67%	UK Government	62%	News UK Sites	64%	Mail Metro Media	67%	News UK Sites	64%	eBay Inc	58%
10	X (formerly Twitter)	60%	X (formerly Twitter)	61%	Spotify Music	61%	UK Government	63%	News UK Sites	65%	Apple Inc	62%	News UK Sites	57%

Source: Ipsos, Ipsos iris Online Audience Measurement Service, Ranking report, May 2023, age: 15+, UK. Note: Each organisation has been allocated a colour.

YouTube is the top-reaching Alphabet-owned service among children and adults

YouTube – which for adults includes the main YouTube app and site as well as YouTube Music, YouTube Kids and YouTube Studio – is the highest-reaching (91%) Alphabet-owned service among UK online adults.[21] Our children's online passive measurement pilot study indicates that YouTube, which for children aged 8-12 includes the main YouTube app and site as well as YouTube Music app and YouTube Kids app, is the highest-reaching (96%) Alphabet-owned service among UK online 8-12-year-olds. In the UK YouTube permits use of its service if users are at least 13 years old; however, it stipulates that children of all ages may use its main service and YouTube Kids if enabled by a parent or legal guardian. Eighty-five per cent of the 8-12-year-olds in our pilot study visited the main YouTube service but not YouTube Kids; 12% visited both the main YouTube service and YouTube Kids; and 1% used YouTube Kids only.[22]

Google Search[23] is the second-highest-reaching Alphabet service, reaching 86% of UK online adults in May 2023[24] and 87% of online children aged 8-12[25]. Gmail is the highest-reaching email service among adults overall, reaching 51% of UK online adults in May 2023, ahead of Microsoft's Outlook at 48% (23 million). Other Alphabet-owned services include Fitbit and Snapseed (a photo-editing app) visited by 4.5 million (9.5%) and 345k (0.7%) UK online adults in May 2023 respectively.[26]

Nine of the top ten Alphabet-owned services appeared in both the children's and adults' ranking (see Figure 11). However, the Google Classroom app, which doesn't appear in the adults top ten, ranks tenth, reaching 5% of online children aged 8-12. Google Calendar appears in eighth position for online adults but is not in the top ten for children.[27]

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[21] Ipsos, Ipsos iris Online Audience Measurement Service, YouTube, May 2023, age: 18+, UK.

[22] Ofcom Ipsos Children's Online Passive Measurement 2023, age: 8-12, UK. Base: 162. Reach based on seventeen children visiting service at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.

[23] Does not include Google search services - Maps, Shopping, Play or News.

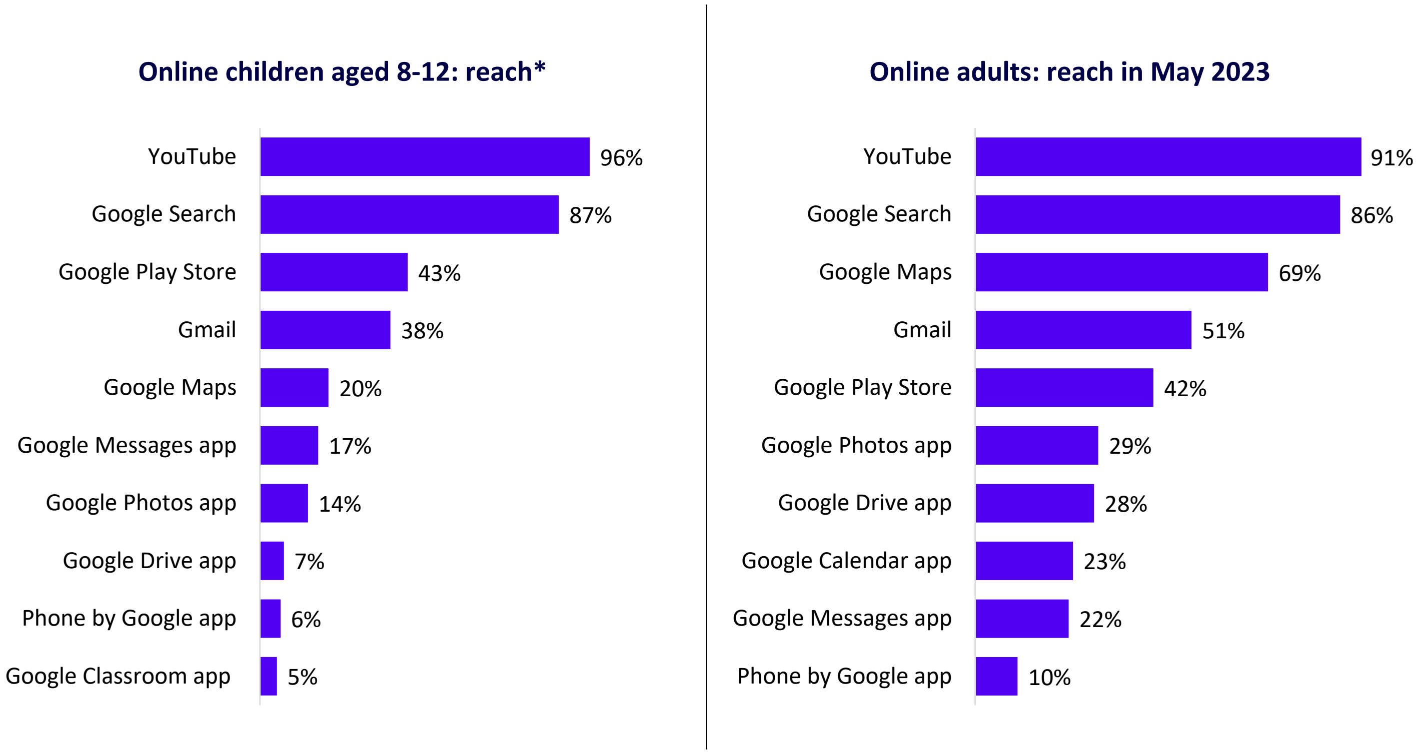
[24] Ipsos, Ipsos iris Online Audience Measurement Service, Google Search, May 2023, age: 18+, UK.

[25] Ofcom Ipsos Children's Online Passive Measurement 2023, age: 8-12, UK. Base: 162. Reach based on seventeen children visiting service at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.

[26] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.

[27] Ofcom Ipsos Children's Online Passive Measurement 2023, age: 8-12, UK. Base: 162. Reach based on seventeen children visiting service at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative. / Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.

Figure 11: Top ten, by UK online reach, of Alphabet-owned services: children (age 8-12) vs adults: 2023



*Source: Ofcom Ipsos Children's Online Passive Measurement 2023, age: 8-12, UK. Base: 162. *Reach based on seventeen children visiting service at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative. / Ipsos, Ipsos iris Online Audience Measurement Service, Alphabet breakdown, May 2023, age:18+, UK. Note: custom defined list by Ofcom, Google Play services app has not been included as this is a background service and library for use by mobile apps running on the device. Google Search does not include services Maps, Shopping, Play or News.*

UK adult internet users spent an average of 45 minutes a day on Meta-owned sites or apps and 35 minutes on Alphabet-owned sites or apps

By time spent, Alphabet and Meta remain the top two leading organisations accessed on smartphones, tablets, and computers. As in May 2022, 21% of average daily time spent online by UK online adults in May 2023 was on Meta-owned apps or sites (May 2022: 21%, 44 mins), and 16% was on Alphabet-owned apps or sites (May 2022: 16%, 35 mins). Of the 45 minutes spent on Meta services, 26 minutes were spent on Facebook and Messenger, 11 minutes on WhatsApp and just under 9 minutes on Instagram. Both organisations have a sizeable lead over the rest; Bytedance Inc., in third place, accounts for only 5% of time spent online by UK adults, up from 4% in May 2022 (2022: 9 mins daily average per person; 2023: 11 mins daily average per person).[28]

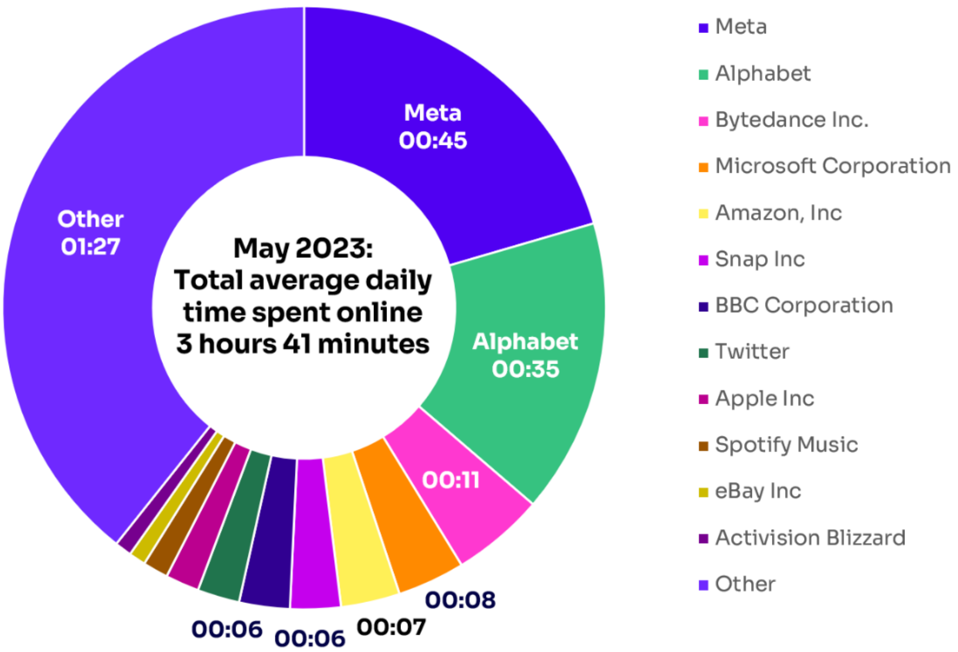
Although UK online adults spend the most time on average on services from these three organisations, they also spend a large portion of their time (1 hour 27 minutes total) on a diverse group of smaller services which meet their interests and needs, such as accommodation sites (e.g.,

[28] Ipsos, Ipsos iris Online Audience Measurement Service, time on smartphones, tablets, and PCs only, May 2022 & May 2023, age: 18+, UK.

Airbnb; 6 seconds May 2023 daily average per online adult), neighbourhood social networking services (e.g., Nextdoor; 20 seconds), and online banking services (e.g., Santander; 16 seconds).[29]

Time spent on Netflix (2 minutes daily average per online adult in May 2023 and May 2022) is significantly understated, as the data only captures time spent on smartphone, tablets and computers and excludes time spent watching Netflix on connected TV sets or smart displays. The same applies to YouTube (19 minutes daily average per online adult in 2022 and 18 minutes in 2023), which is captured under Alphabet's time. The figure for time spent on Spotify (three minutes daily average per online adult in May 2023, and two minutes daily average per online adult in May 2022) does not include time spent listening on smart devices or while the app is not on the foreground of the screen, but audio is playing.[30]

Figure 12: Share of average time spent online per day by UK adult online population, by organisation (hours:minutes): May 2023



Source: Ipsos, Ipsos iris Online Audience Measurement Service, organisations, time on smartphones, tablets and computers only, May 2023, age 18+, UK.

Top applications

Adults used an average of 36 apps on smartphones in May 2023

The average number of apps used is based mainly on their use on smartphones; adults on average used 36 apps on their smartphones in May 2023, up by four since May 2022 (32). The average number of apps used across smartphones and tablets, among adults, has risen from 33 apps in May 2022 to 38 in May 2023. Those aged 25-44 used more apps than other age groups, at an average of

[29] Ipsos, Ipsos iris Online Audience Measurement Service, time on smartphones, tablets, and PCs only, May 2023, age: 18+, UK.

[30] Ipsos, Ipsos iris Online Audience Measurement Service, time on smartphones, tablets, and PCs only, May 2022 & May 2023, age: 18+, UK.

42 apps in May 2023, with 55+ using the least (32). The average number of apps used by adults rose year on year across all age groups.[31]

Our children's online passive measurement pilot study indicates the average number of apps used by 8-12-year-old children on smartphones, whose online use was measured for a period up to 4 weeks, was 17.[32]

Figure 13: Average number of apps visited on smartphone by UK internet users, by age: May 2022 and May 2023

	Age					
	15-17	18-24	25-34	35-44	45-54	55+
May 2023	38	38	41	41	38	30
May 2022	33	33	36	36	33	26

Source: Ipsos, Ipsos iris Online Audience Measurement Service, app, May 2022 and May 2023, age: 15+, UK. Note: Custom data supplied by Ipsos.

Meta-owned WhatsApp, Facebook and Facebook Messenger were the top three smartphone apps by UK online adult reach in May 2023

Eighty-nine per cent of UK online adult smartphone users visited the WhatsApp app in May 2023, maintaining its status as the 'go-to' communication app. The Facebook app reached 81% of UK online smartphone-using adults, while the Facebook Messenger app reached 72%. Google Maps was the fourth most popular smartphone app, visited by 70% of adults, followed by YouTube at 67%. Amazon was the most popular online shopping app for all three adult age ranges (Figure 14). TikTok appeared in the top ten for 18-34 year olds and was in 16th and 36th position for 35-54 year olds and 55+ respectively. Spotify was the most popular music app for young adults, but Apple Music was the most popular for 35+.[33]

Google Play Store appears in the top ten for those aged 55+ but not for other adult age groups, this is probably because those aged 55+ are more likely than other adult age groups to own an Android phone which has the Google Play Store app pre-downloaded (see next paragraph), and because on average they use fewer apps than other adults (average 30 smartphone apps, see figure 13).[34]

Figure 14: Top ten smartphone apps, UK adult reach, by age: May 2023

Age	18-34		35-54		55+	
	App	Online reach (%)	App	Online reach (%)	App	Online reach (%)
1	WhatsApp	90%	WhatsApp	90%	WhatsApp	89%

[31] Ipsos, Ipsos iris Online Audience Measurement Service, app, May 2022 & May 2023, age:15+, UK. Note: Custom data supplied by Ipsos.

[32] Ofcom Children's Online Passive Measurement 2023, age: 8-12, UK. Base: 90. Reach based on seventeen children visiting service at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.

[33] Ipsos, Ipsos iris Online Audience Measurement Service, top smartphone apps, May 2023, age: 18+, UK.

[34] Ipsos, Ipsos iris Online Audience Measurement Service, top smartphone apps, May 2023, age: 18+, UK.

Age	18-34		35-54		55+	
2	Facebook	80%	Facebook	84%	Facebook	78%
3	YouTube	80%	Facebook Messenger	76%	Google Maps	66%
4	Instagram	79%	Google Maps	73%	Facebook Messenger	65%
5	Facebook Messenger	74%	YouTube	71%	YouTube	53%
6	Google Maps	71%	Instagram	68%	Apple Music	51%
7	Spotify	63%	Amazon	66%	Amazon	49%
8	Gmail	60%	eBay	52%	Instagram	47%
9	Amazon	60%	Gmail	52%	Gmail	46%
10	TikTok	54%	Apple Music	51%	Google Play Store	43%

Source: Ipsos, Ipsos iris Online Audience Measurement Service, smartphone app, May 2023, age:18+, UK.

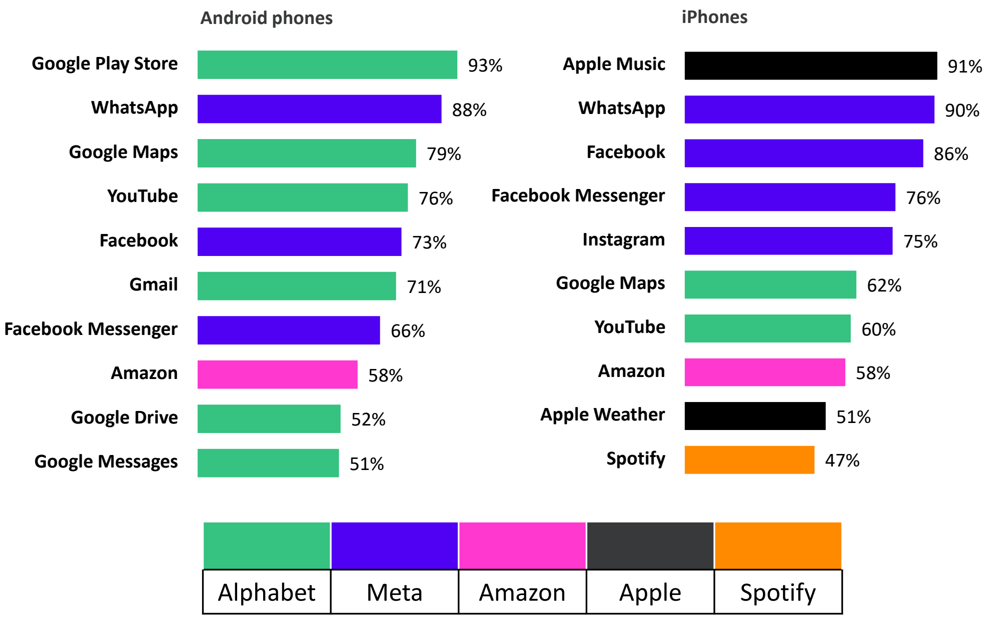
Alphabet-owned apps are the most-visited apps by UK adults on Android smartphones, while Meta-owned apps are the most-visited apps on iPhones

Fifty-one per cent of smartphone users in the UK aged 16+ use an Apple smartphone, while 46% use an Android smartphone.[35] Those aged 16-24 are more likely to use an Apple smartphone (68%) than an Android (30%) while over-54s are more likely to use an Android (56%) than an Apple smartphone (40%). People in the AB socio-economic group are more likely to have an Apple smartphone (61%) than those in the DE group (39%). Over half of those in Scotland (53%) and England (52%) said they used Apple smartphones (Android: Scotland 44%, England 46%), whereas in Wales Android smartphones are more prominent (52% Android, 47% Apple). In Northern Ireland the split is more even, with 43% using Apple, 42% Android, 8% 'neither of these' and 8% saying 'don't know'.[36]

Six of the ten most-visited apps on Android phones by UK adults are owned by Alphabet - Alphabet owns the Android operating system. This compares to two in ten Apple-owned apps on iPhones. Many of these apps come pre-installed, including Google Play, Google Maps and Gmail on Android, and Apple Music and Apple Weather on iPhones. Google Maps, despite the fact that it is not pre-installed on iPhones, has higher reach than Apple Maps on iPhones. Apple Maps ranked just outside the top ten (at 11), reaching 44% of iPhone users, which suggests the prominence of Google Maps as the go-to navigation service.[37]

[35] Ofcom Technology Tracker 2023. 1% said 'neither' and 1% said 'don't know'.
[36] Ofcom Technology Tracker 2023.
[37] Ipsos, Ipsos iris Online Audience Measurement Service, app only Android vs. iOS, smartphone only, May 2023, age: 18+, UK.

Figure 15: Top ten smartphone apps in May 2023, Android phones vs iPhones, based on reach as a % of the total smartphone app universe



Source: Ipsos, Ipsos iris Online Audience Measurement Service, app only Android vs iOS, smartphone only, May 2023, age: 18+, UK. Note: Apple App Store is not measured by Ipsos iris, Google Play services app has not been included as this is a background service and library for use by mobile apps running on the device. Following an enhancement there has been an increase in data for some 'background' apps like Apple Music compared to previous years' data.

Meta-owned WhatsApp, Facebook, Facebook Messenger and Instagram are the top four most-visited smartphone apps daily

Meta's apps also have high daily reach: as the table below shows, four of the five apps with the highest daily reach on smartphones are owned by Meta. The top apps (based on adult visitors on an average day in May 2023) can all be used for messaging or calls. There are demographic differences; the top five apps among 18-24-year-olds were WhatsApp (57%), Instagram (56%), YouTube (42%), TikTok (40%) and Facebook Messenger (39%).[38]

Figure 16: Top five smartphone apps visited on an average day by UK online adults: May 2023

Rank	Smartphone app	Parent company	Average daily UK online adult reach in May 2023	Daily online adult reach in May 2023
1	WhatsApp	Meta	61%	27.3 million
2	Facebook	Meta	50%	22.5 million
3	Facebook Messenger	Meta	39%	17.7 million
4	Instagram	Meta	34%	15.4 million

[38] Ipsos, Ipsos iris Online Audience Measurement Service, top smartphone apps by average daily reach, May 2023, age: 18-24, UK.

Rank	Smartphone app	Parent company	Average daily UK online adult reach in May 2023	Daily online adult reach in May 2023
5	Gmail	Alphabet	28%	12.6 million

Source: Ipsos, Ipsos iris Online Audience Measurement Service, top smartphone apps by average daily reach, May 2023, age: 18+, UK.

YouTube and WhatsApp were the highest-reaching smartphone apps for online children aged 8-12

WhatsApp and YouTube smartphone apps had the highest reach among smartphone-using 8-12 year olds, whose online use was measured for a period up to 4 weeks in our pilot study, with four in five using them at least once during this period. These were followed by TikTok (57%), Roblox (55%), Facebook (43%), Google Play store (41%), Snapchat (40%), Bytedance's photo-editing app Capcut (36%), Gmail (35%) and Spotify (34%).[39] WhatsApp had a daily reach of 68% compared to 57% for YouTube.[40]

[39] Ofcom Ipsos Children's Online Passive Measurement 2023, age: 8-12, UK. Base: 127. Reach based on seventeen children visiting service at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.
[40] Ofcom Ipsos Children's Online Passive Measurement 2023, age: 8-12, UK. Base: 127. Due to low base size data should be treated as indicative only and not representative.

Online sectors

Introduction

This chapter explores children's and adults' behaviour and use of online services, on selected online sectors: search engines, social media, messaging and calling, dating, pornographic content services, news, education, retail and gaming, and looks at the use of generative artificial intelligence.

As seen in the last chapter, many of the highest-reaching online services are those that most of the population have been familiar with for years. YouTube remains the highest-reaching social media service for adults, and for the 8-12-year-old children measured in our study. New online services are also making an impact in the UK. Instagram's microblogging app Threads piqued interest among some UK adults, but X (formerly Twitter) maintains its position as the highest-reaching microblogging service. In gaming, *Candy Crush* remains the top gaming app, but *Royal Match* (a puzzle game launched two years ago) has become the next highest-reaching games app among adults. *Roblox* was the most popular game used by the 8-12-year-olds in our study, which also found a wide array of other games apps with reach of 15% or less among online 8-12-year-olds. In retail, Temu, the challenger retail marketplace, increased its reach within five months of launch to become the third-highest-reaching retailer among adults by August 2023.

In the past year generative AI has been attracting interest among adults and children. The launch of ChatGPT has led to other online services either releasing their own generative AI tools or incorporating ChatGPT into their services, as was done by Snapchat; its Snapchat My AI is the highest-reaching generative AI service among children.

Key metrics

Figure 17: Top-reaching online service by sector among UK online adults, by nation: May 2023

Service	UK	England	Scotland	Wales	N. Ireland
Search	Google search **86%**	Google search **86%**	Google search **85%**	Google search **87%**	Google search **87%**
Generative AI	ChatGPT **23%**	ChatGPT **24%**	ChatGPT **19%**	ChatGPT **12%**	ChatGPT **29%***
Social Media	YouTube **91%**	YouTube **91%**	Facebook & Messenger **93%**	Facebook & Messenger **93%**	Facebook & Messenger **95%**
Messaging and call	WhatsApp **85%**	WhatsApp **86%**	WhatsApp **82%**	WhatsApp **87%**	WhatsApp **88%**
Dating	Tinder **5%**	Tinder **5%**	Tinder **4%**	Tinder **5%**	Tinder **7%**
Services for Pornographic content	PornHub **18%**	PornHub **17%**	PornHub **18%**	PornHub **17%**	PornHub **20%**
Gaming apps	Candy Crush Saga **5%**	Candy Crush Saga **6%**	Candy Crush Saga **5%**	Pokémon GO **6%**	Roblox **8%**
News	BBC **70%**	BBC **70%**	BBC **70%**	BBC **73%**	BBC **79%**
Retail	Amazon **88%**	Amazon **86%**	Amazon **85%**	Amazon **88%**	Amazon **92%**

*Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK. Note: BBC excludes reach via Apple News. / ChatGPT: Ofcom, Online research panel poll: Generative artificial intelligence, June 2023. *Caution N. Ireland ChatGPT low base size (<100). See Communications Market Report 2023: Online interactive data for more UK nations data.*

Search

This section explores general search services that enable users to search the contents of the web. They work by using automated processes designed to find and organise content (known as crawling and indexing). Algorithms are then used to rank the content based on relevance to the search query and other factors (ranking). The vast majority of search services are free to use.

In almost all cases, search services make all their revenue from advertising. Typically, this is done through pay-per-click advertising, where advertisers pay when a user clicks one of their ads. The pricing for key search terms is usually determined by their relevance to the searched terms and queries, and an auction among advertisers for the respective keywords.

Search advertising revenue amounted to £13.1bn in 2022 in the UK, according to IAB UK. A large majority of this was generated by Alphabet's Google, followed in second place by Microsoft's Bing.

On an average day half of UK online adults visited Google Search in May 2023

Google[41] remains the highest-reaching search engine, reaching 86% of UK online adults in May 2023, with half (51%) visiting the search engine daily. With 46% reach, Bing (owned by Microsoft) is the only other search engine which reaches more than 4% of UK online adults. The number of search engines with more than a million UK adult visitors fell from seven in May 2022 to five in May 2023.[42]

Various search engines have a social mission as a core feature of their business model. Launched in December 2009 and ranking sixth in UK online adult reach, Ecosia uses its profits to support tree planting and is the highest-reaching search engine in the market with a 'social good' business model (figure 18). Just under half (48%) of Ecosia's adult visitors in May 2023 were aged 18-34; this age group represents 28% of the adult internet population as a whole.[43] More recent entries to the market with a 'social good' business model include Malaysian-based Ekoru,[44] launched in 2019, and German-based Ocean Hero,[45] which donate revenue to their charity partners to reduce plastic pollution in the ocean, and other water-related pollution. Additionally, Ekoru servers are powered by zero-emission hydroelectricity.[46] [47]

Figure 18: UK online adult reach of top ten search engines: May 2023

Rank	Search engine	Headquarters	Total adult reach in May 2022	Total adult reach in May 2023	Year-on-year change	Online adult reach in May 2023	Average time spent in May 2023 per visitor (hours:mins)
1	Google Search	US	41.1m	41.3m	+252k	86%	01:15
2	Bing	US	13.9m	21.9m	+8.0m	46%	00:36

[41] Does not include Google search services - Maps, Shopping, Play or News.
[42] Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK.
[43] Ipsos, Ipsos iris Online Audience Measurement Service, Ecosia, May 2023, age: 18+, UK.
[44] Forbes, How the search engine Ekoru is cleaning up our oceans, 19 January 2020.
[45] OceanHero, OceanHero, accessed 7 August 2023.
[46] Ekoru, About, accessed 3 August 2023.
[47] UK adult audience data is unavailable on Ekoru or Ocean Hero suggesting low or no adult audience reach within the UK.

Rank	Search engine	Headquarters	Total adult reach in May 2022	Total adult reach in May 2023	Year-on-year change	Online adult reach in May 2023	Average time spent in May 2023 per visitor (hours:mins)
3	Yahoo!	US	1.5m	1.6m	+111k	3%	00:13
4	AOL	US	1.5m	1.4m	-154k	3%	02:26
5	DuckDuckGo	US	1.8m	1.3m	-541k	3%	00:40
6	Ecosia	Germany	814k	724k	-90k	2%	03:58
7	ask.com	US	498k	574k	+76k	1%	00:10
8	Info.co.uk	US	1.9m	539k	-1,335k	1%	00:01
9	Yandex	Russia	1.3m	379k	-879k	1%	00:06
10	Generalsearch.net	US	-	263k	-	1%	> 00:01

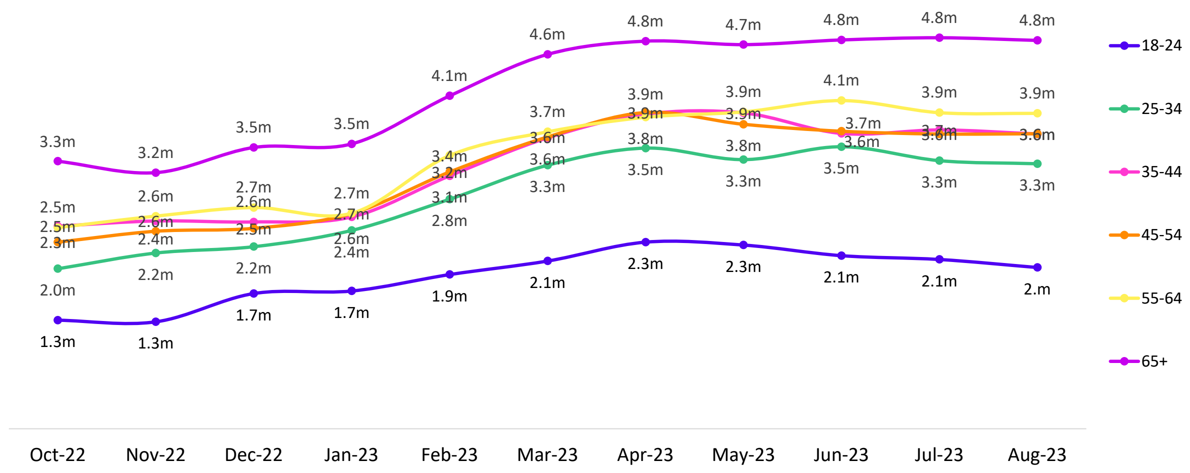
Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK. Note: Google Search does not include Google search services - Maps, Shopping, Play or News.

Bing.com's UK online adult reach rose from 33% in January 2023 to 46% in May 2023, following the introduction of Bing AI

In February 2023, Microsoft launched a new version of its Bing search service and Edge web browser powered by OpenAI's Chat GPT-4 technology, called Bing Chat.[48] In February 2023 18.5 million adults visited bing.com, an increase of nearly 3 million adults compared to January 2023 (15.6 million); this upward trend continued until April 2023, after which reach plateaued, with 21.2 million adults visiting the site in August 2023.[49] Unlike the OpenAI website, (see figure 21 in Generative artificial intelligence section) which has a higher reach among younger internet users, the reverse is true for bing.com: 4.8 million of those aged 65+ visited bing.com in August 2023 while only 98k of those aged 65+ visited the OpenAI website.[50] Google is also integrating AI technology as part of its services, firstly with the launch of Google Bard, although at the time of writing this is not part of its core search engine. Google is offering Bard as a separate 'experimental' AI chatbot. At time of writing Google is also working on embedding generative AI capabilities into its search engine and in the USA is testing its 'Search Generative Experience' with interested members of the public.[51]

[48] Microsoft, Reinventing search with a new AI-powered Microsoft Bing and Edge, 7 February 2023.
[49] Ipsos, Ipsos iris Online Audience Measurement Service, bing.com, monthly 2023 data, age: 18+, UK.
[50] Ipsos, Ipsos iris Online Audience Measurement Service, bing.com and Open AI web, August 2023, age: 65+, UK.
[51] Google blog, Supercharging Search with generative AI, 10 May 2023.

Figure 19: Monthly reach of Bing.com website, by age: October 22 – August 23



Source: Ipsos, Ipsos iris Online Audience Measurement Service, October 2022 - August 2023, age: 18+, UK.

Generative artificial intelligence

Generative artificial intelligence (generative AI) broadly refers to algorithms that can create new content in response to a prompt. Various AI algorithms then return new content in response to the prompt. The new content can include text, images, audio, video or code. The content created closely resembles the content on which the model was trained.

The monetisation of generative AI is at a very early stage, currently comprising a variety of business models (ad-funded, subscription, payments and licensing) and is likely to remain diverse in the medium-term.

Three in ten UK internet users aged 16+ said they used a generative artificial intelligence tool

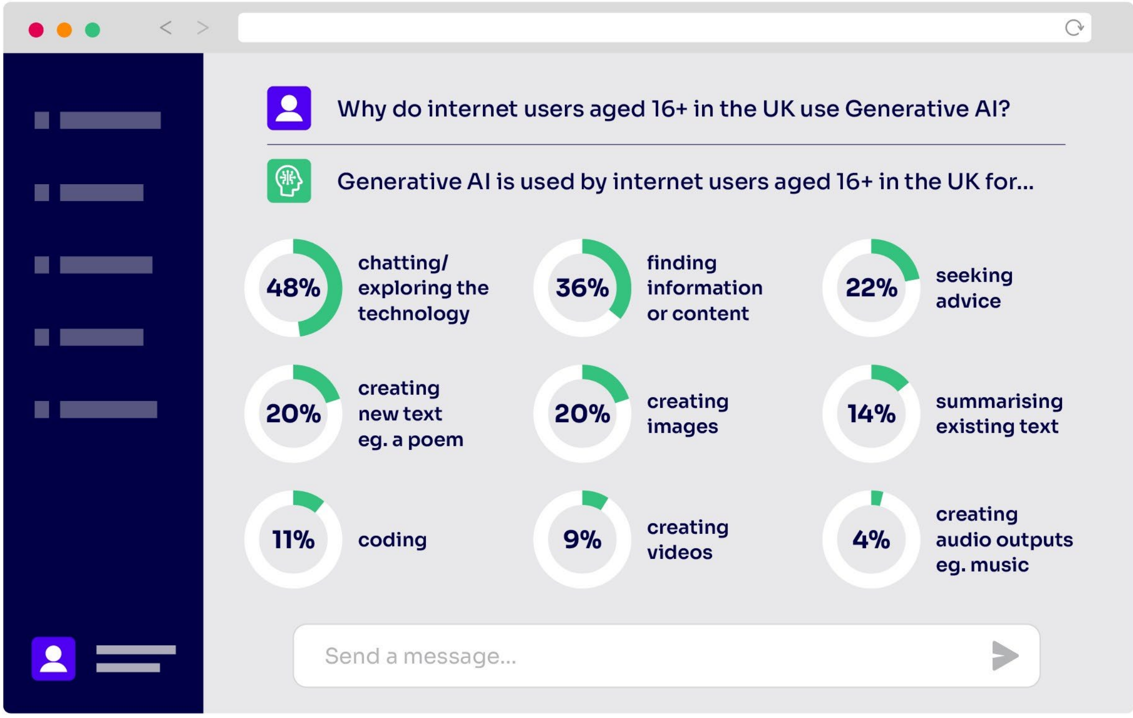
Online men aged 16+ in the UK are more likely than women to say they had used a generative AI tool (39% vs 24%). Seventy-four percent of online 16-24 year olds said they used a generative AI tool while 14% of those aged 45+ said the same (25-34 year olds: 50%; 35-44 year olds: 35%). The most popular reason given for using generative AI tools was to chat or explore the technology, cited by 48% of internet users aged 16+ who had previously used generative AI tools. Fifty-eight per cent of UK internet users aged 16+ said they used a generative AI tool for fun, a third said they used it for work purposes and a quarter said they used it to help with their studies.

Sixty-nine per cent of internet users said they had never used a generative AI tool or said they didn't know. The most popular reason for not doing so was that they were '*not interested in the technology*' (36%), followed by '*don't need to use generative AI*' (31%) or '*don't know what it is*' (24%).[52]

[52] Ofcom, Online research panel poll: Generative artificial intelligence, June 2023

But internet users are also conscious of the potential risks of generative AI, with over half (58%) concerned about its future impact on society. Two-thirds of online 16–24-year-olds said they were worried about its future societal impact, while 53% of 25-34 year olds said the same.[53]

Figure 20: UK use of generative AI, online age 16+



Source: Ofcom, Online research panel poll: [Generative artificial intelligence](), June 2023. Multi-select question: And for what purpose did you use a G-AI tool? Base: Those who said they had previously used generative AI.

At its peak in May 2023, 3.4 million UK adults visited the OpenAI website[54]

OpenAI provides two types of generative AI tools; Dall-E, its image generation tool, and ChatGPT, its chatbot. On 30 November 2022, OpenAI launched ChatGPT, its large language model-based chatbot, on its website. A study estimated that ChatGPT reached 100 million monthly active users globally in January 2023.[55] At the time of writing there were three versions of ChatGPT available: 1) ChatGPT-3.5, a freely available chatbot Gen AI; 2) GPT-4, made publicly available in March 2023 via a £16-per-month subscription to ChatGPT Plus, giving subscribers access to a more advanced model responding faster than the free version; and 3) ChatGPT Enterprise, aimed at businesses and offering enhancing security and privacy features and a faster version of ChatGPT-4 which launched in August 2023. In September 2023, OpenAI announced the integration of DALL-E 3 into ChatGPT Plus and Enterprise, translating text requests into detailed images.[56] OpenAI has also announced the roll-out of functionality enabling the use of voice and images to engage with ChatGPT.[57]

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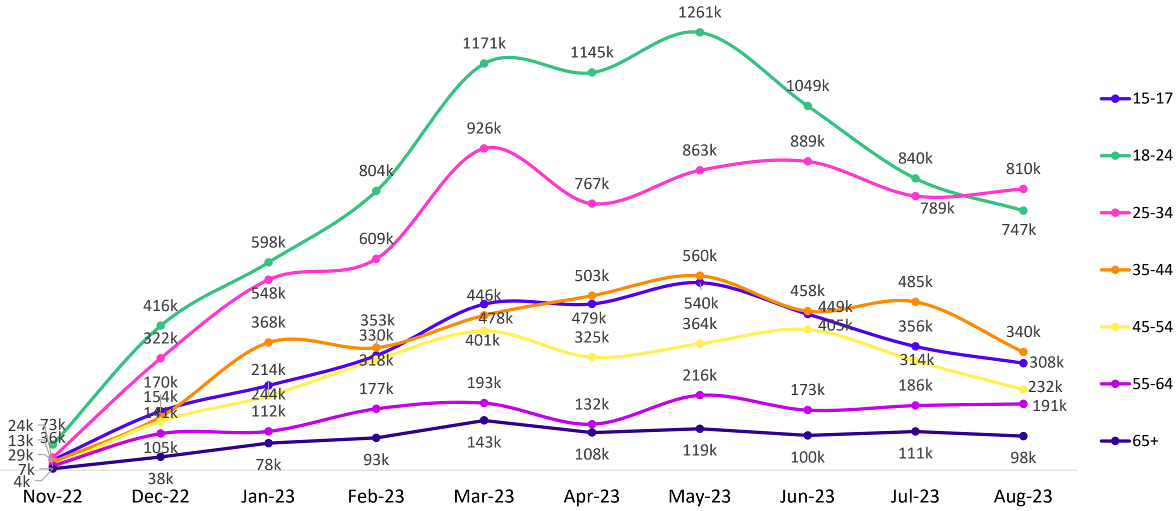
[53] Ofcom, Online research panel poll: Generative artificial intelligence, June 2023
[54] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.
[55] Similarweb insights, ChatGPT Tops 25 Million Daily Visits, 3 February 2023
[56] OpenAI, DALL-E 3, 20 September 2023
[57] OpenAI, ChatGPT can now see, hear, and speak, 25 September 2023

In the UK, OpenAI's website audience has been growing since November 2022 among all adult age groups, with a skew towards younger adults. There was a notable drop in reach to the OpenAI website among 15-24 year olds in June-August 2023 (see figure 21 below);[58] perhaps because this period was at the end of the academic year, and this age group had potentially less need to find information or content relating to their education. In May 2023, OpenAI released the ChatGPT app for iOS,[59] and in July 2023 Ipsos iris reported initial data for this app, finding that 286k (0.6%) UK online adults had visited the app that month. Adult reach increased to 565k (1.2%) in August 2023 following the release of the Android version of the app in July 2023. Most (57%) of the adult app visitors did not visit the OpenAI website (323k). The majority of ChatGPT app visitors were men (71% male vs 29% female) and 36% of the app visitors were aged 25-34.[60]

Figure 21: Monthly reach of OpenAI website, by age: November 22 – August 23



Source: Ipsos, Ipsos iris Online Audience Measurement Service, OpenAI website only, November 2022-August 2023, age: 15+, UK. Due to methodology enhancements, there may be a break in trend from April 2023.

Among UK internet users aged 16+ ChatGPT is the most widely used generative AI tool

Ipsos iris data provides insight on the people visiting OpenAI and Snapchat; however, as the OpenAI website is home to both ChatGPT and DALL-E, and Snapchat includes many features including Snapchat My AI, Ofcom commissioned a survey to understand which generative AI tools people were using. This research was conducted in June 2023 and found that 23% of UK internet users aged 16+ had used ChatGPT, followed by 15% having used Snapchat My AI (see figure 22).[61] An example of a more niche service is Midjourney, which generates digital images from natural language descriptions and is available to use via a subscription with the basic plan starting at $10 per month.[62] Ipsos iris data found that in May 2023 261k (0.6%) UK online adults had visited the Midjourney website.[63]

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[58] Ipsos, Ipsos iris Online Audience Measurement Service, OpenAI website, May-August 2023, age: 15+, UK.
[59] OpenAI, Product announcements, 18 May 2023
[60] Ipsos, Ipsos iris Online Audience Measurement Service, ChatGPT app, July-August 2023, age: 18+, UK.
[61] Ofcom, Online research panel poll: Generative artificial intelligence, June 2023.
[62] Midjourney, Subscription plans, accessed on 9 October 2023
[63] Ipsos, Ipsos iris Online Audience Measurement Service, Midjourney, May 2023, age: 18+, UK.

In February 2023 Google launched its generative AI tool, Bard. In March 2023 948k (2%) UK online adults visited Bard, but unlike OpenAI, which has increased in reach over time, Bard's reach decreased to 1% (576k) in May 2023.[64]

Figure 22: UK internet users aged 16+ who have used a generative AI tool

Generative AI	internet users aged 16+		
	All	Male	Female
ChatGPT	23%	30%	17%
Snapchat My AI	15%	18%	12%
Bing Chat	11%	15%	6%
DALL-E	9%	14%	5%
Google Bard	9%	14%	5%
Midjourney	8%	13%	4%

Source: Ofcom, Online research panel poll: Generative artificial intelligence, June 2023. Question: How often do you use the following G-AI tools? Respondents who selected the following frequency of use for each generative AI tool: 'always', 'often', 'sometimes', or 'rarely'.

Four in five online teenagers and two in five online 7-12s have used a generative AI tool – most use Snapchat My AI

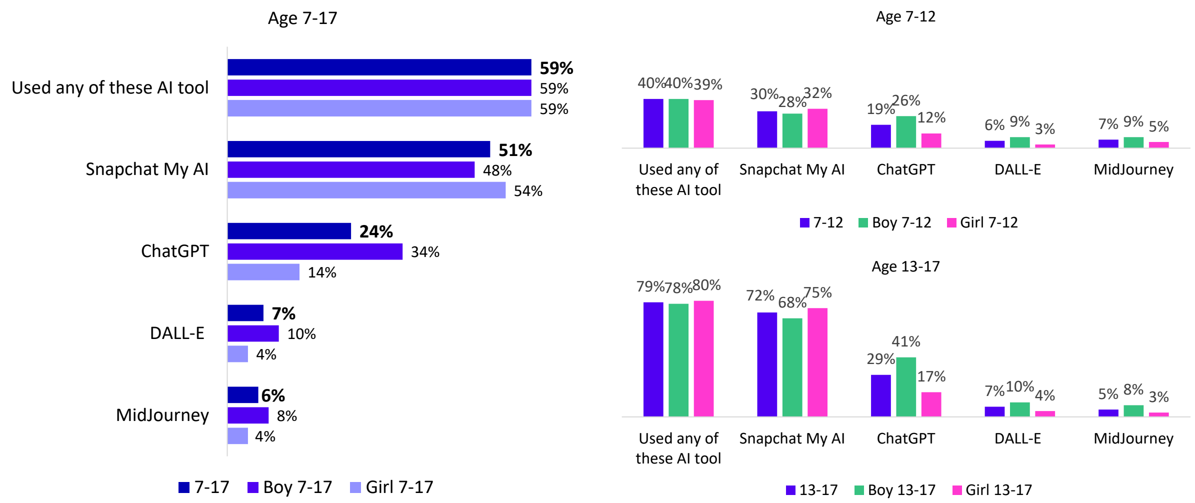
In June 2023, three in five (59%) online 7-17 year olds said they had used any of the following AI tools: ChatGPT, Snapchat My AI, Midjourney or DALL-E[65]. While there was no difference by gender at a total level, or between younger or older boys and girls, there were differences by age. While four in five teenagers aged 13-17 said they had used at least one of the AI tools (79%), two in five 7-12s had used one (40%). Three per cent of 7-17 year olds had used all of the AI tools listed, with 5% of boys saying this, compared to just 2% of girls.

In June 2023, half of UK online 7-17 year olds said they had used Snapchat My AI, making it the most widely used generative AI tool of those listed, probably because it is the most accessible, as it is accessed through existing Snapchat accounts. A third of 7-17 year olds said they had used it in the past month (fieldwork conducted in June and July 2023). Snapchat's My AI chatbot initially launched in February 2023, allowing Snapchat's paid subscribers to chat directly in the Snapchat app with an AI chatbot powered by OpenAI's GPT technology.[66] In April 2023 the AI chatbot became available to all Snapchat users for free.[67] Girls are slightly more likely than boys to have ever used Snapchat My AI (54% vs 48%), and usage is much higher among 13-17 year olds; 72% have ever used it, compared to 30% of 7-12s. Teen girls are the most likely users, with 75% saying they have ever used Snapchat My AI. Snapchat has a minimum age threshold of 13; this will be a factor for the higher reach among older children compared to younger children.

[64] Ipsos, Ipsos iris Online Audience Measurement Service, Bard, May 2023, age: 18+, UK.
[65] Other generative AI tools were available in the market during our survey period, but during the conception of the research these services were highlighted as they were currently prominent in public discussion.
[66] Snapchat Newsroom, Say Hi to My AI, 27 February 2023
[67] Snapchat Newsroom, SPS 2023: What's next for My AI, 19 April 2023

One in four (24%) 7-17 year olds have used ChatGPT, with boys more likely than girls to have done so (34% vs 14%). This generative AI tool is also more popular among teens (29%) than 7-12s (19%), peaking sharply among older boys, at 41%. One in six (16%) said they had used ChatGPT in the past month, with boys far more likely than girls to have done so (23% vs 9%).[68]

Figure 23: Online children who have used artificial intelligence tools



Source: CHILDWISE summer omnibus 2023. Services used in the past six months: Fieldwork conducted June-July 2023.

Social media

Social media services connect users and enable them to build communities around common interests or connections, allowing them to create and share a wide range of content. Typically, users can find, follow and communicate with each other through direct messaging, posting or sharing content, as well as commenting and reacting to content. Some social media services are also video-sharing services where users can upload and share videos with the public. They often allow users to communicate through private messaging, posting content, and expressing their opinions of videos. In addition, users can often follow or subscribe to creators of content. Some video-sharing services also support livestreaming.

Social media is monetised primarily through advertising, often targeted based on users' online behaviour and demographic information. In 2022, social display advertising amounted to £6.7bn, more than doubling in five years. However, as the online advertising market matures and its growth plateaus, social media companies are diversifying and experimenting with paid-for revenue streams. In the past few years, most social media companies have introduced a premium subscription model option offering enhanced services.

YouTube is the most popular social media service among adults

YouTube is the highest-reaching social media service among UK online adults using smartphones, tablets or computers, taking the top spot in May 2023 from Facebook (including Messenger), with

[68] CHILDWISE, summer omnibus 2023.

more than nine in ten (91.0%) visiting it that month. In May 2022, Facebook was the highest-reaching social media service, reaching 93.8% of UK online adults but in May 2023 it had 1.4 million fewer adult visitors, maintaining a high overall UK online adult reach (90.7%) but now on par with YouTube. TikTok, in fifth place, overtook LinkedIn, now ranked sixth, reaching 44.3% of UK online adults in May 2023, up by 9 percentage points since May 2022 (34.7%). UK online 18-24-year-olds are avid users of social media, and over half of them are visiting six social media platforms: 96% visited YouTube in May 2023, 87% visited either Facebook or Facebook Messenger, 86% visited Instagram, 72% visited TikTok, 71% visited Snapchat and 61% visited X (formerly Twitter).[69]

Photo-sharing app BeReal was among the top ten social media services visited by 18-24-year-olds (1.4 million in May 2023, ranked tenth). It had 2.0 million UK online adult visitors in May 2023, making it the 16th highest-reaching social media service among adults overall. BeReal's UK adult users rose from 282,000 in July to 1.4 million by August 2022, a fivefold increase. Significant growth in reach continued until late 2022 but has since plateaued. BeReal's adult audience is primarily made up of 'Gen Z', with 70% of its UK adult visitors aged 18-24.[70]

Facebook visitors aged 45+ spend half an hour on the platform per day, while 18-24s spend just 12 minutes per day

There are clear demographic differences in the amount of time spent on some social media services. In May 2023 Facebook and Messenger visitors aged 45+ spent more time than 18-24-year-olds (averaging 29 vs 12 minutes per day) on these platforms. (May 2022 figures: 45-year-olds: 36 minutes; 18-24s: 17 minutes). But on YouTube, TikTok, Instagram and Snapchat, 18-24-year-old visitors spent more time than older visitors. In May 2023 the 3.8 million UK 18-24-year-old TikTok visitors spent an average 55 minutes on TikTok per day (May 2022: 3.5 million, 53 minutes), while the 3.8 million 18-24-year-old Snapchat visitors spent 58 minutes per day (May 2022: 3.5 million, 42 minutes). In comparison, those aged 45+ visiting TikTok (8.2 million) and Snapchat (1.8 million) spent on average 9 minutes daily on each service in May 2023 (May 2022: TikTok 11 minutes and Snapchat 5 minutes).[71]

[69] Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK.
[70] Ipsos, Ipsos iris Online Audience Measurement Service, BeReal, July 2022, August 2022 and May 2023, age: 18+, UK.
[71] Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK. Note: time spent based on monthly average time per visitor in month divided by number of days in month.

Figure 24: UK online adult reach of top ten social media sites/apps: May 2022 and May 2023

May 2023 reach rank		UK total adult audience in month			UK online adult reach	Average daily adult audience in month			Average time spent per day by adult visitor	
	Social media	May 2022	May 2023	Year-on-year change	May 2023	May 2022	May 2023	Year-on-year change	May 2022	May 2023
1	YouTube	43.9m	43.5m	- 0.3m	91%	20.1m	20.4m	+0.3m	20 minutes	20 minutes
2	Facebook & Messenger	44.8m	43.4m	- 1.4m	91%	32.1m	29.5m	-2.6m	32 minutes	23 minutes
3	Instagram	34.2m	34.7m	+ 0.5m	73%	15.6m	16.6m	+1.0m	10 minutes	12 minutes
4	X (Twitter)	26.8m	24.0m	- 2.9m	50%	10.3m	9.5m	-0.8m	6 minutes	10 minutes
5	TikTok	16.6m	21.2m	+ 4.6m	44%	5.4m	6.7m	+1.3m	27 minutes	26 minutes
6	LinkedIn	18.6m	18.9m	+ 0.3m	39%	4.7m	5.3m	+ 0.6m	2 minutes	2 minutes
7	Reddit	14.9m	15.6m	+ 0.7m	33%	3.3m	3.6m	+ 0.3m	5 minutes	5 minutes
8	Pinterest	14.0m	12.5m	- 1.5m	26%	2.1m	1.9m	-0.2m	1 minute	1 minute
9	Snapchat	9.8m	10.3m	+ 0.4m	21%	5.2m	5.8m	+0.6m	22 minutes	29 minutes
10	Nextdoor	9.3m	8.2m	- 1.1m	17%	2.7m	2.5m	-0.2m	2 minutes	2 minutes

Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 & May 2023, social media, age: 18+, UK. Note: TV set and smart display use not included. Time spent based on monthly average time per visitor in month divided by number of days in month. Custom-defined list by Ofcom.

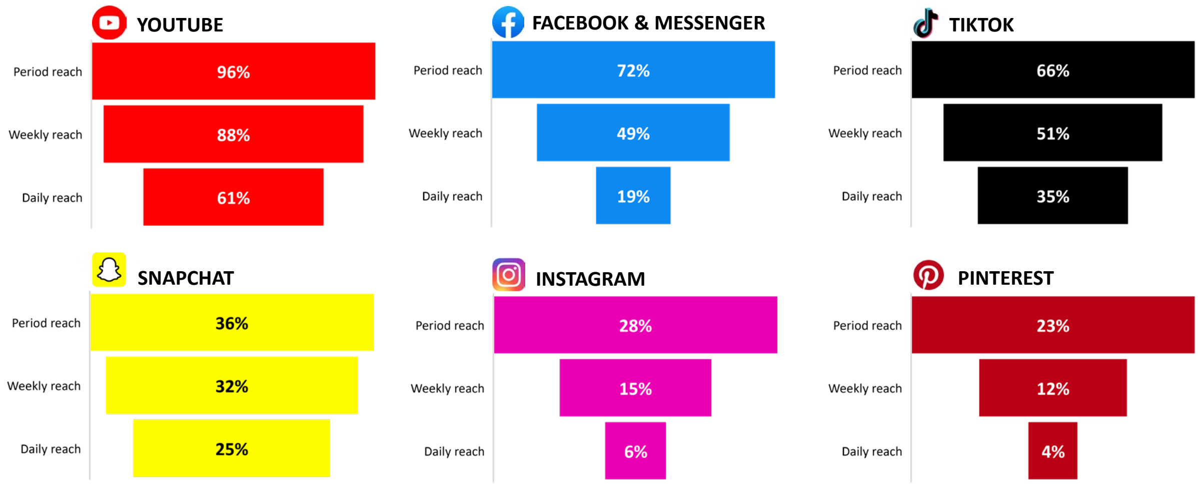
Research into online 8-12-year-olds found that social media reach increases with age, with older children more likely to use it

Almost all the children in our pilot study visited a social media service (97%). YouTube, Facebook (including Messenger) and TikTok were the highest-reaching social media services among online children aged 8-12, whose online use was measured for a period up to 4 weeks in our pilot study, reaching 96%, 72% and 66% respectively. However, when looking at average per day visits, after YouTube at 61%, TikTok was the next highest-reaching (35%) followed by Snapchat (25%) and Facebook (19%). X (formerly Twitter) had a reach of 16% over the fieldwork period[72] while BeReal's reach was 8%. Although BeReal's month reach was less than one in ten, its *daily* reach was 5%, which points to it having a small but dedicated user base among our sample.

Our pilot study indicates that older children (11- and 12-year-olds) are more likely to use social media: 72% of 11-12s use TikTok weekly versus 37% of 8-10s. One in five children aged 8-10 used TikTok daily, compared to 58% of 11- to 12-year-olds. Snapchat was comparable here, with 13% of 8-10s using this service compared to 42% of 11- and 12-year-olds.

Capcut, a video-editing app owned by TikTok owner Bytedance, was visited by 32% of online 8-12-year-olds and was the 14th highest-reaching service among the children studied. Our pilot study indicates that girls are twice as likely as boys to visit this service (43% v 21%).[73] Among adults Capcut was visited by 874k (2%) UK online adults in May 2023. Capcut is particularly popular among younger online users; 68% of its adult audience are aged 18-34 (598k). Ninety-four per cent of adults who visited Capcut (822k) also visited TikTok, suggesting that a main use of CapCut is to produce videos to be uploaded to TikTok.[74]

Figure 25: Top six social media services based on pilot study total period reach among online children aged 8-12



Source: Ofcom Ipsos Children's Passive Measurement 2023, age: 8-12, UK. Base: 162. Period reach: includes seventeen children visiting service at least once over three-week measurement period in January-February 2023

[72] Fieldwork period includes seventeen children visiting service at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-June 2023.

[73] Ofcom Ipsos Children's Passive Measurement 2023, age: 8-12, UK. Base: 162. Reach based on seventeen children visiting service at least once or weekly or daily over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.

[74] Ipsos, Ipsos iris Online Audience Measurement Service, Capcut and TikTok, May 2023, age: 18+, UK.

combined with results from 145 children who were measured for four weeks during April-June 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative. See Methodology for further details. TV set and smart display use is not included.

Figure 26: UK online 15–17-year-olds top six social media by reach: May 2023

Rank	Social media	15-17 year old reach May 2023	Online aged 15-17 reach in May 2023
1	**YouTube**	2.2m	96%
2	**Facebook & Messenger**	2.0m	87%
3	**Instagram**	1.9m	86%
4	**TikTok**	1.6m	72%
5	**Snapchat**	1.6m	71%
6	**X (formerly Twitter)**	1.4m	60%

Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, Ranking report, Category: Social media, age: 15-17, UK. Note: TV set and smart display use not included.

The 8-12-year-old Snapchat users in our research spent an average of 1 hour 18 minutes a day on Snapchat

In our pilot study research, the 36% of online 8–12-year-olds who used Snapchat spent an average of 1 hour 18 minutes a day on it, and this was predominantly driven by 11-12 year old users. 8-12-year-old girls spent, on average, 33 minutes more than boys (girls: 93 minutes vs boys: 60 minutes). The 96% of online 8-12-year-olds who used YouTube spent about an hour per day using YouTube across smartphone, tablet and computer (63 minutes), boys spent more time than girls on YouTube – 1 hour 19 minutes compared to 48 minutes. The next highest time spent per day was among the 66% of TikTok-using online 8–12-year-olds at an average of 46 minutes a day. Girls spend more time than boys on TikTok (52 minutes vs 37 minutes). The 72% and 28% of online 8–12-year-olds who used Facebook and Messenger, and Instagram respectively spent significantly less time on these services, spending 3 minutes per day on each of these services.[75]

[75] Ofcom Ipsos Children's Passive Measurement 2023, age: 8-12, UK. Base: 162. Data based on seventeen children measured over three-week period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.

Figure 27: Average time spent per day by 8-12-year-old visitors to top five reaching social media services: hours:minutes

	Snapchat	YouTube	TikTok	Facebook & Messenger	Instagram
Age of visitor					
8-12	01:18	01:03	00:46	00:03	00:03
8-10	00:26	01:14	00:32	00:02	00:02
11-12	01:49	00:47	00:57	00:04	00:03

Source: Ofcom Ipsos Children's Passive Measurement 2023, age: 8-12, UK. Base: 162. Top five based on period reach of seventeen children visiting service at least once over three-week period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.

By the start of September 2023, 23% of UK online individuals aged 16+ had used Instagram's microblogging service Threads

Instagram's microblogging service, Threads, launched on 5 July 2023 and became the most rapidly downloaded app in history, with more than 100 million global users signing up in the five days after launch.[76] Ofcom commissioned research to explore the variety of microblogging platforms people are using[77] and whether users are posting content on microblogging services. In the UK by the start of September – less than three months after launch, just under a quarter (23%) of online users aged 16+ said they had ever used Threads – significantly lower than those reporting to have ever used X (formerly Twitter) (52%). Of those who had used Threads, one-third (31%) reported posting content on the service in the past month. Of those who had ever used X, 29% said they had posted content in the past month.[78]

According to Ipsos iris data X/Twitter has been experiencing a gradual decline in UK online adult reach in recent years, with the number of visitors to the service dropping by 11 percentage points between May 2021 (61% UK online adult reach) and May 2023 (50% UK online adult reach). Tumblr was the second highest reaching microblogging service in May 2023, visited by 2.2 million (5%) UK online adults.[79]

At its peak in November 2022, when Ipsos iris first reported data on Mastodon, this platform was visited by 773k (1.6%) UK online adults, but its reach has been in decline, dropping to 267k (0.6%) in December 2022, 60k (0.1%) in May 2023 and then to 58k (0.1%) in August 2023.[80] It should be noted

[76] Quiver Quantitative, Threads tracker, accessed 4 October 2023. Counts generated using the Threads account numbers shown on Instagram pages. Reported in Forbes, Threads Now Fastest-Growing App In History—With 100 Million Users In Just Five Days, 10 July 2023

[77] Ipsos had reportable data on X, Tumblr and Mastodon. Ipsos iris had partial data on Threads app at time of drafting so total number of visitors could not be report on. All other services in the Ofcom survey had no reportable data in Ipsos iris, either due to none of the panellists visiting the sites/apps, or not enough panellists visited the sites/apps for data to be reported.

[78] Ofcom, Online Research Panel Poll: Microblogging, September 2023.

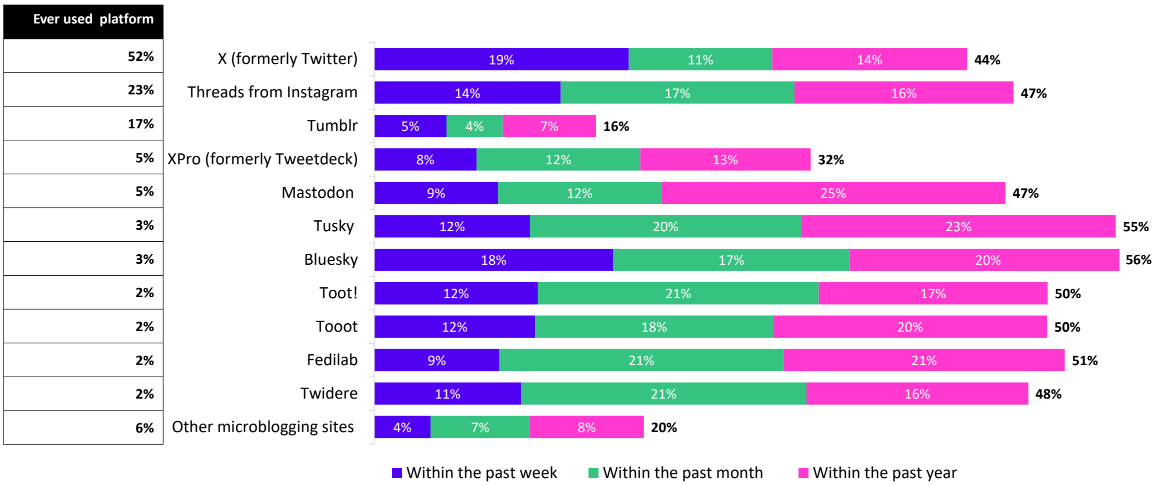
[79] Ipsos, Ipsos iris Online Audience Measurement Service, May 2021 and May 2023, age: 18+, UK.

[80] Ipsos, Ipsos iris Online Audience Measurement Service, Mastodon, November, December 2022 and August 2023, age: 18+, UK.

that Mastodon's service can be accessed via other platforms such as Tusky, Toot! and Tooot which is explored in our microblogging research see figure 28 below.

Bluesky is a microblogging service conceptualised by former Twitter CEO Jack Dorsey and developed in parallel with Twitter. Twitter initially funded Bluesky, but since Elon Musk's purchase of Twitter, Bluesky has been independent of Twitter/X.[81] Bluesky, at the time of writing, is in beta mode (invitation only) and has 1.8 million registered accounts globally.[82] Our microblogging research found 3% of internet users aged 16+ said they had used Bluesky, and 35% of those who had used Bluesky said they had posted content in the past month.[83]

Figure 28: How recently UK online users aged 16+ of selected microblogging platforms last posted content, with % of those who have ever used the platforms



Source: Ofcom, Online Research Panel Poll: Microblogging, September 2023. Table question: When did you last use the following micro-blogging services? Those who ever used. Chart question base those who said they used platform: Have you posted any content (i.e. text, images, videos etc.) on [selected platform], and how recently did you do so? Those who selected more than a year ago, never or don't know/can't recall are not shown on chart.

Messaging and call services

Messaging services enable users to send and receive messages that can only be viewed or read by a specific recipient or group of people. Some services apply encryption to messaging. In addition to text, most of these services allow users to share voice notes, images and videos, and make and receive video calls. Some high-reaching messaging services are also social media services; these social media services are explored in the social media section.

WhatsApp remains the most popular messaging service, accessed by 28 million UK adults daily in May 2023

Among adults, Meta-owned WhatsApp and the Facebook Messenger app were the highest-reaching messaging services. Fifty-eight per cent of UK online adults accessed WhatsApp (web or app) daily, while 39% visited Facebook Messenger[84] (not including use of Messenger via the main Facebook site or app) daily in May 2023. Both were up on the previous year (May 2022: 48% and 32%

[81] Techcrunch, What is Bluesky? Everything to know about the app trying to replace Twitter, 24 July 2023
[82] Twexit, Blue Sky Statistics, accessed 2 November 2023
[83] Ofcom, Online Research Panel Poll: Microblogging, September 2023.
[84] Includes Facebook Messenger app, Messenger Lite or messenger.com visitors.

respectively).[85] Although we cannot report use of Instagram Direct using Ipsos iris (due to various activities that can be undertaken on Instagram, not just messaging), Ofcom's Adults' Media Literacy Tracker found that 40% of internet users aged 16+ used Instagram Direct (behind WhatsApp (79%) and Facebook Messenger (61%)) in November 2022.[86]

A quarter (26%) of UK online adults visited at least one Alphabet-owned private messaging service in May 2023: Google Messages (22%), Phone by Google (10%), Google Meet (7%) and Google Chat app[87] (0.5%). Telegram's userbase is skewed towards men, who outnumber female users by two to one (67% to 33%).[88]

While use of messaging services was high across all the UK nations, certain services had peaks in particular nations. Google Messages had relatively high reach among online adults in Northern Ireland (31%) and Wales (29%) compared to the UK-wide reach of 22%. Phone by Google also had higher reach in these two nations, at 15% of online adults versus 10% across the UK as a whole, as explored earlier in the Top Applications section. In Wales this may be partly due to a slightly higher take-up of Android compared to Apple smartphones in Wales, and this may also be the reason in Northern Ireland,[89] whereas the reverse is true for England and Scotland.[90]

Ofcom's Technology Tracker 2023 found that nearly six in ten UK adults use online communications services to make either voice (60%) or video (56%) calls online; among 16-34-year-olds this rises to 68% and 64% respectively. Among online adults aged 55+, 46% make voice calls and 43% video calls.[91]

Figure 29: UK online adult reach of top ten online messaging or call services: May 2023

Rank	Service	Total adult audience in month			Online adult reach in May 2023	Average daily adult audience in month		Average time spent by visitor in May 2023 (hrs:mins)
		May 2022	May 2023	Year-on-year change		May 2022	May 2023	
1	WhatsApp	40.0m	40.9m	+0.9m	85%	22.7m	27.5m	06:46
2	Facebook Messenger*	32.8m	33.7m	+0.9m	70%	15.2m	18.5m	03:12
3	Google Messages	9.7m	10.7m	+0.9m	22%	4.8m	5.5m	01:10
4	Zoom	8.6m	7.1m	-1.5m	15%	0.9m	0.7m	00:38
5	Discord	4.4m	5.9m	+1.5m	12%	1.5m	1.7m	02:36
6	Phone by Google app	4.7m	5.0m	+0.3m	10%	2.2m	2.5m	02:19

[85] Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, adults age: 18+, UK.
[86] Ofcom Adults' Media Literacy Tracker 2022: Online Behaviours and Attitudes survey
[87] Note: Google chat can be accessed directly via Gmail, which is not captured in this data.
[88] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, adults aged 18+, UK.
[89] Although Apple vs Android split was relatively balanced in Northern Ireland, 8% said they did not know their device operating system and so could largely be Android users as most brand smartphones use Android operating system whereas only Apple phones use Apple's operating system.
[90] Ipsos, Ipsos iris Online Audience Measurement Service, 1 May – 31 May 2023, adults aged 18+, UK.
[91] Ofcom Technology Tracker 2023.

Rank	Service	Total adult audience in month			Online adult reach in May 2023	Average daily adult audience in month		Average time spent by visitor in May 2023 (hrs:mins)
		May 2022	May 2023	Year-on-year change		May 2022	May 2023	
7	Google Meet	118k	3.2m	+2.5m	7%	0.1m	0.2m	00:16
8	Telegram	2.6m	3.2m	+0.5m	7%	0.8m	0.8m	01:09
9	Skype	1.7m	1.9m	+0.3m	4%	0.2m	0.4m	01:00
10	Slack	1.2m	1.2m	-0.04m	2%	0.4m	0.4m	02:18

*Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 & May 2023, age: 18+, UK. Note: Custom-defined list by Ofcom. *Facebook messaging service can be accessed via the main Facebook platform and is not counted here. Includes Facebook Messenger app, Messenger Lite app or messenger.com visitors. Microsoft Teams not included as desktop app use not measured.*

By age 10 the majority of children use WhatsApp

Ofcom's Children's Online Passive Measurement pilot study indicated that four in five online 8-12-year-olds visited a messaging or call service during the fieldwork period.[92] As with adults, WhatsApp was the highest-reaching service among the online 8-12 year olds (64%)[93] and the UK online 15-17s (86%)[94]. Seventy-one per cent of 8-12 year olds visited WhatsApp on a device they do not share with other people in their household. 39% of online 8-9-year-olds visited WhatsApp, doubling to 80% for online 10-12 year olds. Forty-one per cent of online 8-12-year-olds used WhatsApp on an average day, with the older children more likely to do this: 8-10s: 24%, 11-12s: 67%.[95]

Chinese-owned messaging service WeChat was the second-highest-reaching messaging service among online 8-12s (17%, tied with Google Messages).[96] WeChat is used much less by older children – (less than 2% (35k) of online 15-17-year-olds in May 2023) and by adults – (less than 1% of UK online adults (268k)).[97]

[92] Ofcom Ipsos Children's Passive Measurement 2023, Category: Instant messaging and video conferencing, age: 8-12, UK. Base: 162. Reach based on seventeen children visiting a service at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.

[93] Ofcom Ipsos Children's Passive Measurement 2023, WhatsApp, age: 8-12, UK. Base: 162. Reach based on seventeen children measured over three-week period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.

[94] Ipsos, Ipsos iris Online Audience Measurement Service, WhatsApp, May 2023, 15-17, UK.

[95] Ofcom Ipsos Children's Passive Measurement 2023, WhatsApp, age: 8-12, UK. Base: 162. Reach based on seventeen children measured over three-week period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.

[96] ibid.

[97] Ipsos, Ipsos iris Online Audience Measurement Service, WeChat, May 2023, age: 15+, UK.

Figure 30: Top five reaching messaging and call services, among children, by age

Rank	Service	Online children aged 8-12	Online children aged 8-10	Online children aged 11-12
1	**WhatsApp**	64%	51%	83%
2	**Google Messages**	17%	18%	15%
-	**WeChat**	17%	11%	25%
4	**Discord**	15%	13%	18%
5	**Facebook Messenger app**	10%	7%	15%

Rank	Service	Children aged 15-17 May 2023	Online aged 15-17 reach in May 2023
1	**WhatsApp**	1,956k	86%
2	**Facebook Messenger***	1,623k	72%
3	**Discord**	733k	32%
4	**Google Messages**	392k	17%
5	**Zoom**	353k	16%

*Source: Ofcom Children's Passive Measurement 2023, age: 8-12, UK. Base: 162. Reach based on seventeen children visiting service at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. / Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, 15-17, UK. Note: Custom-defined list by Ofcom. *Facebook messaging service can be accessed via the main Facebook platform and is not counted here. Includes Facebook Messenger app, Messenger Lite app or messenger.com visitors. Microsoft Teams not included as desktop app use not measured. Due to low base sizes for 8-12 and 15-17 data should be treated as indicative only and not representative.*

Dating services

Online dating services provide users with the opportunity to form romantic connections or forge new friendships via messaging and calls. Users are often paired using algorithms that use the information they enter when creating their user profiles. Users can often filter by demographic features and location.

Many dating services operate a freemium business model, where the service is offered free with limited features, but users can upgrade to paid services. Revenue streams can include subscriptions and/or in-app purchases.

Over one in ten UK online adults visited a dating service in May 2023

In May 2023 more than one in ten (11%) UK online adults visited an online dating service. Match Group's dating services, which include Tinder, Hinge, Plenty of Fish, OKCupid, Match.com and OurTime, together reached 7% of UK online adults (3.2 million) in May 2023. Tinder was the highest-reaching of its portfolio of dating services, reaching 2.5 million (5%) UK online adults. Bumble Inc., which owns Bumble and Badoo, reached 4% of UK online adults (1.7 million) in May 2023; most of whom accessed Bumble (4%), while 1% visited Badoo.

Many users use more than one dating service. Across the Match services, 80% of Hinge visitors and 55% of Plenty of Fish visitors also visited Tinder during the month. Half of the adults who visited Badoo also visited Bumble (49%) in May 2023. Tinder was also widely visited by visitors of Bumble Inc. services, with a majority of the visitors to both Bumble (68%) and Badoo (50%) also visiting Tinder in May.

Although Tinder was the service with the highest reach, time spent was relatively low; visitors spent just over an hour (1hr 12mins) on the platform in May 2023, compared with about two hours spent on Hinge (2hrs 12 mins), Bumble (2hrs 22mins) and Plenty of Fish (1hr 55mins). Grindr had by far the longest time spent per visitor; the average visitor spent nearly seven hours on the platform in May.[98]

Table 31: UK online adult reach of top dating platforms: May 2023

Rank	Service	Total UK adult reach in May 2022	Total UK adult reach in May 2023	Year-on-year change	UK online adult reach in May 2023	Average daily adult audience in May 2023	Average time spent in May 2023 (hrs:mins)
1	Tinder	2,155k	2,487k	+332k	5.2%	899k	01:13
2	Hinge	1,042k	1,509k	+467k	3.2%	671k	02:12
3	Bumble	1,220k	1,440k	+220k	3.0%	587k	02:22
4	Grindr	790k	924k	+134k	1.9%	374k	06:49
5	Plenty of Fish	537k	625k	+88k	1.3%	182k	01:55
6	Squirt	460k	530k	+70k	1.1%	79k	00:26
7	Badoo	490k	482k	-8k	1.0%	186k	03:42
8	PURE Hookup	-	299k	-	0.6%	24k	00:15
9	Happn	-	275k	-	0.6%	85k	01:01
10	Match	287k	209k	-78k	0.4%	54k	01:34

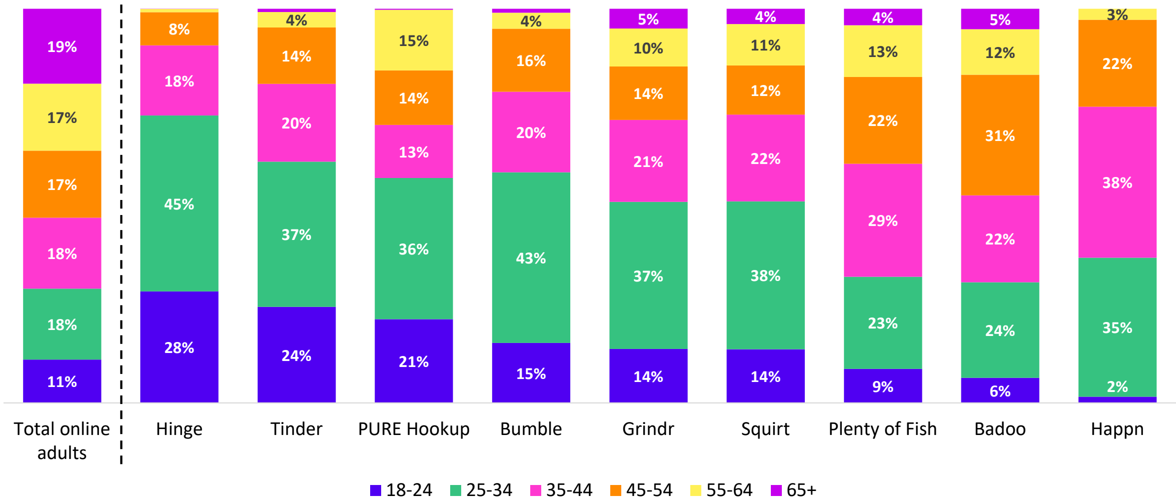
Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK. Note: Custom-defined list by Ofcom. Dash represents data unavailable for period.

[98] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK

Dating services were visited by one in five online 25-34-year-olds in May 2023

Online dating services reached 20% of 25-34-year-olds, the highest reach among any adult age group. The 18-24-year-olds were the second most prominent visitors, with 17% visiting at least one dating service in May 2023. The majority of visitors to most dating platforms were 18-34-year-olds; Hinge skewed most heavily towards this younger age group with 73% of visitors aged 18-34. Plenty of Fish, Badoo, and Happn all skewed towards older users, with more than half aged 35-54. OurTime, a dating service for the over-50s, was visited by 126k (0.3%) of UK online adults, 63% of its adult audience were aged 55+. OurTime was the fifth-highest-reaching online dating service among online over-54s, with LGBTQ social networking and dating service Grindr the most popular, reaching 136k (0.8%).[99]

Figure 32: Top ten dating services by adult reach, adult audience composition by age: May 2023

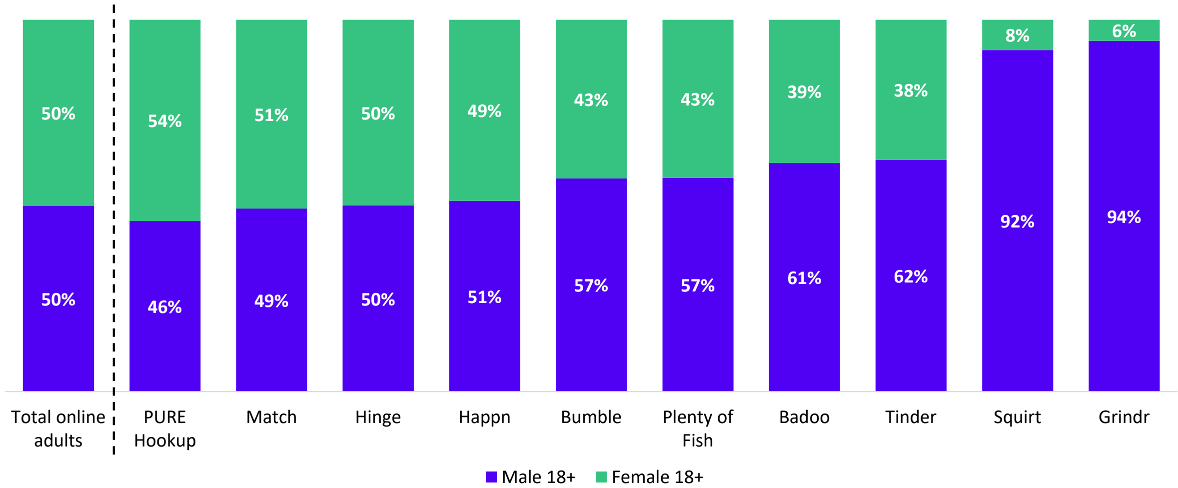


Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, adults age: 18+, UK. Note: Custom-defined list by Ofcom comprised of platforms reaching 1%+ of UK online over-18s.

The overall visitors for online dating platforms was split 61% male and 39% female in May 2023. Men outnumber women on many online dating services; the PURE Hookup app and Match were the only dating services in the top ten where women outnumbered men.[100]

[99] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.
[100] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.

Figure 33: Top ten dating services by adult reach, adult audience composition by gender: May 2023



Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.

Services for pornographic content

Services for pornographic content primarily provide or enable the dissemination of pornographic content (sometimes also described as 'adult content'). This content can be published or displayed in the form of text, videos and images or audio, or provided in a live or interactive format. Users can also sometimes search for user-generated content and connect with one another. Some services are known as 'tube sites' and focus on uploaded pre-recorded images or videos. Others are known as 'cam sites' which specialise in providing livestreamed content to users and may enable interaction between performers and viewers. Direct messaging and livestreaming functionalities may also be available.

Paid content is common on services for pornographic content, but many free-to-use services rely on advertising to generate large proportions of their revenue. Some services allow users to buy monthly subscriptions to content makers, from which a set percentage is deducted by the service provider. Pornhub – the largest online service for pornographic content – reported that 80% of its advertising revenue is distributed to content providers in its Model Program and 20% is kept by the company. The average revenue per 1000 views for creators in the Model Program was $0.66 in 2021.[101]

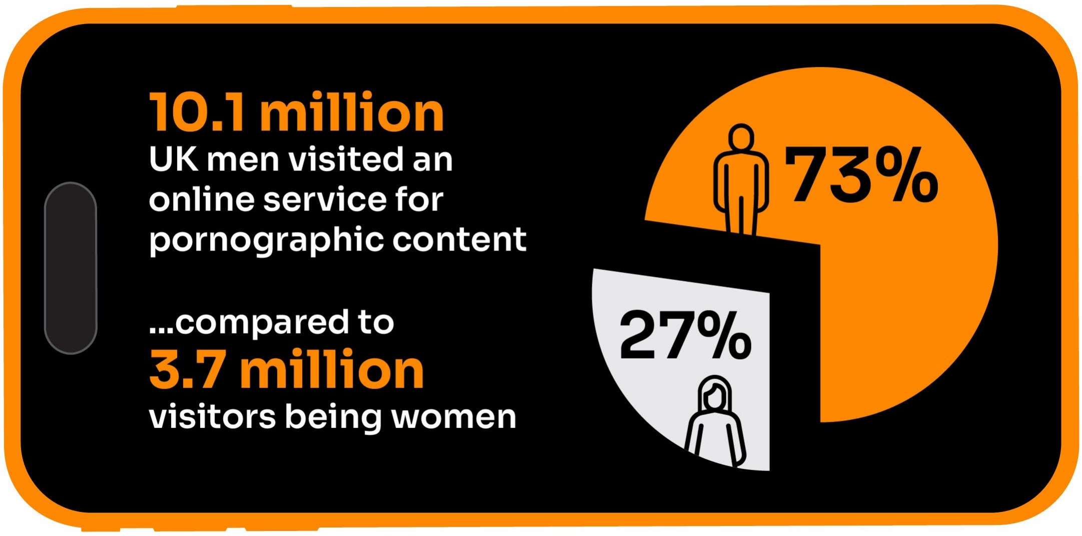
Twenty-nine per cent of UK online adults accessed services for pornographic content in May 2023

Twenty-nine per cent (13.8 million) of UK online adults accessed a pornographic content service in May 2023, and reach has remained relatively stable year on year (May 2022: 31%, 14.6 million). The majority of these were men; 10.1 million UK men visited an online service for pornographic content, making up 73% of adult visitors to these services. In England, Scotland and Northern Ireland 29% of online adults visited an online service for pornographic content, while 33% of online adults in Wales did so. During May 2023 there were more UK adult visitors to services for pornographic content

[101] Pornhub, Model Program | How to make money on Pornhub, accessed 19 October 2023.

during the morning and afternoon periods of the day (9am to 5:29pm) than at other times of the day (21% UK online adult reach), although UK adults spend the most time on these services between midnight and 8:59am (59 minutes on average per visitor in May 2023, compared to 55 minutes on average per visitor in the mornings and afternoons).[102]

Figure 34: Adult visitors to pornographic content services, by gender and audience composition



Source: Ipsos, Ipsos iris Online Audience Measurement Service, category: general x-rated adult, May 2023, age: 18+, UK.

Figure 35: UK online adult reach to services for pornographic content, by day part: May 2023

	Night time and breakfast	Morning and afternoon	Early peak	Late peak and late night
Day part:	00:00-08:59	09:00-17:29	17:30-19:59	20:00-23:59
Online adult reach:	**18%**	**21%**	**13%**	**17%**

Source: Ipsos, Ipsos iris Online Audience Measurement Service, category: general x-rated adult, May 2023, age: 18+, UK.

Pornhub is the most popular pornographic content service across all adult age groups and for both men and women

According to Pornhub, the UK remained the second-highest country in terms of daily traffic to the website (behind the USA) in 2022.[103] Younger adults are more likely than older people to visit Pornhub – 30% of UK online 18-34 year olds visited the service in May 2023, compared to 10% of over-44s. Among 18-34s, 40% of online men (2.9 million) visited Pornhub, compared to 20% of online women (1.4 million). Pornhub has a sizeable lead over other online pornographic content

[102] Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK.
[103] Pornhub Insights, Year in review 2022, 8 December 2022.

services; it reached 18% of online adults in May 2023, compared to second-highest reaching Chaturbate (9%) and XVideos (8%), ranked third (see figure 36 below).[104] Pornhub's parent organisation Aylo[105] (formerly MindGeek) also owns YouPorn, Redtube, and Brazzersnetwork, and 19% of UK online adults visited one of these four services in May 2023.[106]

More UK adults accessed the highest-reaching pornographic content services in May 2023 than in May 2022, with UK online adult reach increasing by at least 10% for five of the top ten services: Xnxx by 23.4%, Livejasmin by 24.3%, OnlyFans by 19.3%, Adultwork by 24.9%, and YouPorn by 13.9%.

The top ten pornographic content services vary little by user age, although the adult gif site Redgifs (4% online 18-24-year-old reach, 224k) only appears in the top ten for adults under 25. The erotic fiction site Literotica and video-sharing site Redtube are the only services in the top ten highest-reaching pornographic content services among women, but do not appear in the men's top ten, while Adultwork and the cam site Livejasmin appear in the top ten for men only. Bellesa (0.3% UK online adult reach in May 2023) – a pornographic video, fiction, and retail service specifically geared towards women – has the highest proportion of female users, at 65%. Erotic fiction sites Lush Stories and Literotica come in second (44%) and third place (41%) by female audience composition, and are more popular with adults aged 25-44 (both at 44% of overall adult composition).[107]

Hentai, a sub-genre of anime or manga comprising sexually explicit anime and manga content, was the third most popular search term on Pornhub globally in 2022, having held the top spot in 2021.[108] The pornographic gaming site Hentai Heroes (0.6% UK online adult reach) skews heavily male; men make up 89% of its adult audience and it is most popular with 18-24-year-olds (38% of overall composition). Hentai Heroes jumps from 40th to ninth place in the UK for general online adult reach when we consider only those who access pornographic content services through computers.[109]

UK adult visitors to services for pornographic content spent an average of almost 2 hours on these services in May 2023

UK adult visitors to services for pornographic content spent an average of 1 hour 56 minutes on these services in May 2023. Pornhub, the highest-reaching online service for pornographic content among UK adults, is ranked seventh by average time spent per visitor to pornographic content services, with visitors spending an average of 52 minutes on Pornhub in May 2023. UK adults appear to spend more time on pornographic content services which feature a literary component; these services reach a small but highly engaged portion of the population. The erotic literary sites Nhentai and Literotica are ranked first and sixth by average time spent per visitor, at 3 hours 42 minutes and 1 hour 9 minutes in May 2023, although they reached only 0.2% (109k) and 1% (522k) of the UK online adult population respectively.[110]

[104] Ipsos, Ipsos iris Online Audience Measurement Service, Pornhub, Chaturbate, X-videos, May 2023, age: 18+, UK.
[105] Mindgeek rebranded to Aylo in August 2023
[106] Note that there are other Aylo-owned entities that are not measured in Ipsos iris as they do not meet the minimum measurement threshold.
[107] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.
[108] Pornhub Insights, Year in review 2022, 8 December 2022
[109] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.
[110] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.

Figure 36: Top ten online services for pornographic content by UK online adult reach, May 2022 and May 2023

Rank	UK online adults aged 18+							Male aged 18+			Female aged 18+		
	Service	Online reach May 23	Audience May 2022	Audience May 2023	Year-on-year change	UK 18+ adult gender composition May 2023		Service	Online reach May 23	Audience May 23	Service	Online reach May 23	Audience May 23
						Male	Female						
1	Pornhub	18%	8.2m	8.4m	+ 0.2m	73%	27%	Pornhub	26%	6.1m	Pornhub	9%	2.3m
2	Chaturbate	9%	3.9m	4.2m	+ 0.3m	80%	20%	Xvideos	15%	3.5m	Chaturbate	4%	851k
3	Xvideos	8%	4.0m	4.0m	+ 0.02m	86%	14%	Chaturbate	14%	3.4m	Xnxx	3%	615k
4	Xnxx	7%	2.6m	3.2m	+ 0.6m	81%	19%	Xnxx	11%	2.6m	Xvideos	2%	565k
5	Xhamster	6%	2.9m	2.7m	- 0.2m	89%	11%	Xhamster	10%	2.4m	Xhamster	1%	302k
6	Stripchat	4%	2.3m	2.0m	- 0.3m	88%	12%	Stripchat	8%	1.8m	Stripchat	1%	249k
7	Livejasmin	4%	1.5m	1.9m	+ 0.4m	93%	7%	Livejasmin	7%	1.8m	YouPorn	1%	246k
8	OnlyFans	3%	1.4m	1.6m	+ 0.3m	89%	11%	OnlyFans	6%	1.4m	Redtube	1%	222k
9	Adultwork	3%	1.0m	1.3m	+ 0.3m	91%	9%	Adultwork	5%	1.2m	Literotica	1%	214k
10	YouPorn	3%	1.1m	1.3m	+ 0.2m	80%	20%	YouPorn	4%	1.0m	OnlyFans	1%	186k

Source: Ipsos, Ipsos iris Online Audience Measurement Service, Ranking report, Category: General X-rated adult, May 2022 and May 2023, age: 18+, UK.

Gaming

Online gaming services enable user-to-user interaction in partially or fully simulated virtual environments. While functionalities vary by service, users may interact by creating or manipulating avatars, objects, and the environments themselves, and/or by using voice and text chat. Some services use matchmaking systems to match users with each other based on parameters such as network characteristics, hardware, user preferences, availability and skill. This section will explore the take-up of devices that can be used for online gaming, gaming subscriptions, and the mobile games that are popular in 2023.

Thirty-eight per cent of UK adults aged 16+ play games online, as do 57% of UK children aged 3-15[111]

Ofcom's media literacy research found that gaming remains popular, with 56% of UK adults aged 16+ and 91% of 3-15-year-olds stating that they played games on devices,[112] either on- or offline.[113] Ampere Analysis research found that the time that gamers reported they spent gaming, either on- or offline, had declined from an average of 8 hours 16 minutes a week in Q2 2022 to 7 hours 11 minutes in Q2 2023. 16-24-year-olds spent 7 hours 48 minutes, and 25-34 year olds spent 6 hours 51 minutes, gaming, lower than in Q2 2022 when they spent 8 hours and 57 minutes and 8 hours 39 minutes respectively. The factors driving this decline may include better weather in Q2 2023, or a continuing adjustment from the peak of gaming during Covid lockdowns of 2020 and 2021. The 13-15 year old teens continued to spend the most time gaming, at 11 hours 40 minutes a week. Males spent 8 hours 32 minutes, whereas females spent 5 hours 40 minutes.[114]

Ampere Analysis research found that very few gamers (13-64 years old) played exclusively on one type of device. Sixteen per cent of smartphone gamers played only on a smartphone, 14% of console gamers played exclusively on consoles and 5% of PC gamers played exclusively on PCs, either on- or offline.[115] Ampere forecasts that in 2023 the UK will spend £5,388m on games content and services, a 0.2% decline on 2022 (£5,398m). Spend on mobile specifically is expected to increase from £1,669m in 2022 to £1,735m in 2023, a 4% increase. However, Ampere predicts spend on consoles to decrease by 3%; from £2,901m in 2022 to £2,819m in 2023.[116]

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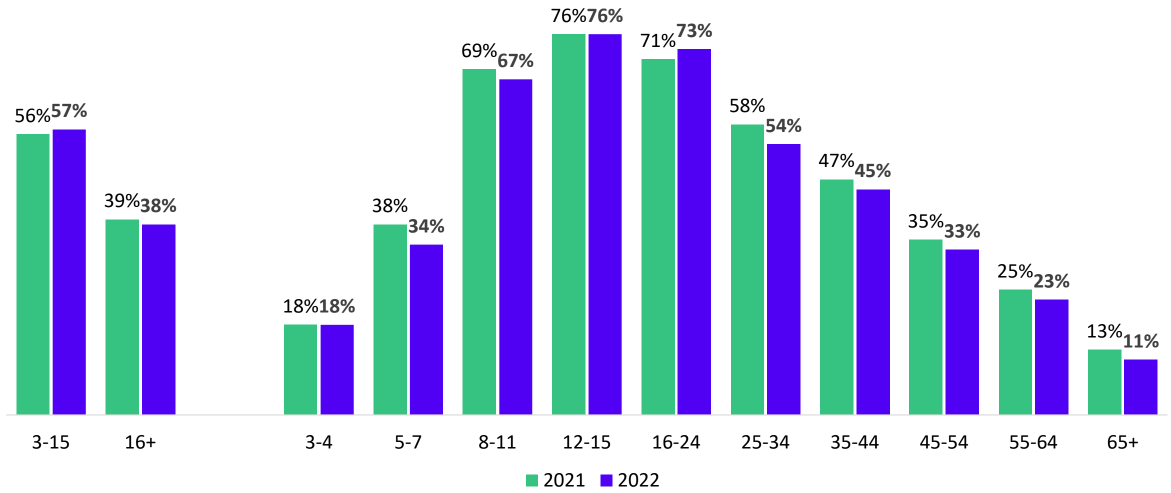
[111] Ofcom Adults' Media Literacy Tracker 2022: Core survey; Ofcom Children's and Parent's Media Literacy Tracker 2022: Online Behaviours and Attitudes survey.
[112] Devices include smartphone, consoles, tablet, computer/laptop, VR headset, app on TV or wearable technology.
[113] Ofcom Adults' Media Literacy Tracker 2022: Core survey; Ofcom Children's and Parent's Media Literacy Tracker 2022: Online Behaviours and Attitudes survey.
[114] Ampere Games – Consumer, Q2 2021, Q2 2022 and Q2 2023, gamers aged: 13-64, UK.
[115] Ampere Games – Consumer, Q2 2023, gamers aged: 13-64, UK.
[116] Ampere Games - Markets

Figure 37: UK individuals who play games online



Source: 3-15-year-olds: Ofcom Children's and Parent's Media Literacy Tracker 2022: Online Behaviours and Attitudes survey. Base: All children aged 3-17 (5,861). 16+: Ofcom Adults' Media Literacy Tracker 2022: Core survey. G3A. Do you play games online? (single coded). Base: All adults (3651)

23% of households have a digital-only games console

Overall, 39% of UK households have at least one games console.[117] Thirty-five per cent of households with at least one games console have the Xbox Series X or S, followed by PlayStation 5 (24%) and Nintendo Switch (22%). Digital-only versions of consoles, such as the PlayStation 5 or Xbox Series S, do not have an optical disc or cartridge-operated drive and therefore need an internet connection to download or stream digital games or play games online via a games subscription service. Thirteen per cent of games console households have the Xbox Series S, while 22% have the Series X; 11% have the PlayStation 5 digital edition while 14% have the PlayStation 5 disc edition.[118] With homes opting for digital-only consoles, connection to the internet is becoming even more important for gaming.

Ampere Analysis research found that the top title played by Xbox or PlayStation console gamers in August 2023 was *Fortnite*, played by 2.88 million UK gamers, followed by *FIFA* 23 (2.86 million), *Grand Theft Auto* V (2.22 million) and *Minecraft* (1.68 million).[119]

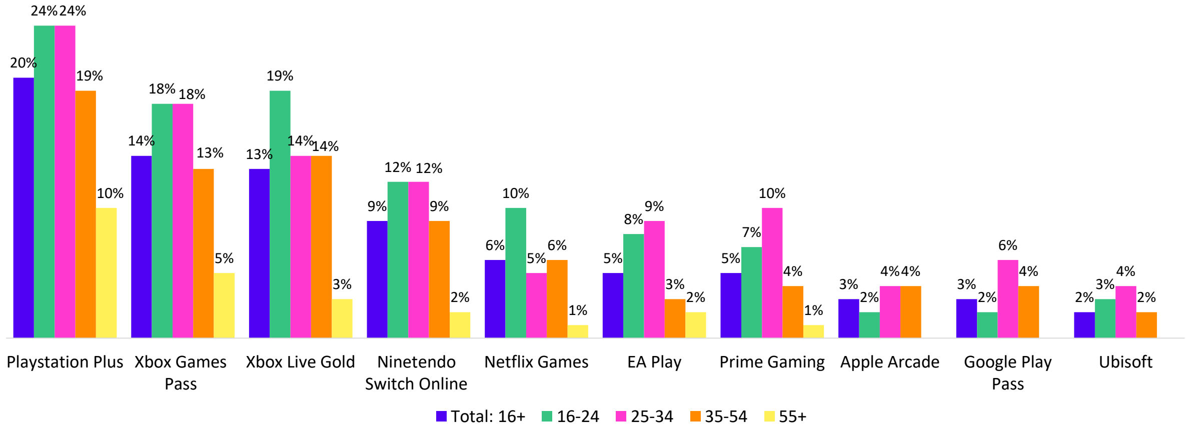
47% of online gamers subscribe to a gaming subscription service

Gaming subscription services vary in the type of service they offer to consumers; they can offer single or multiple standalone services, online multiplayer functionalities, access to game catalogues and content, and the ability to stream games via the cloud.[120] Some subscriptions, such as EA Play and Ubisoft+, allow users to access a catalogue of games; Ge-Force Now enables users to cloud stream games; and subscriptions such as PlayStation Plus and Xbox Game Pass provide a combination of benefits such as online multiplayer, game catalogues and content, and cloud streaming, depending on the subscription tier purchased. One in ten UK adults subscribe to a gaming

[117] Ofcom Technology Tracker 2023
[118] Ofcom Technology Tracker 2023, Base: where household has a games console.
[119] Ampere Games – Analytics, August 2023, UK
[120] a method of playing video games using remote servers in data centres; the games do not need to be downloaded or installed on a PC or console. The streaming services use an internet connection to send the gaming information to an app or browser installed on the recipient's device. The game is rendered and played on the remote server, but the gamer sees and interacts with everything locally on their own device. - Digital trends, What is cloud gaming?, 29 March 21.

subscription service. Men are more likely than women to subscribe (12% vs 8%). People aged 16-34 (18%) are more likely than average to have at least one games subscription (10%). A third of online gamers have an online multiplayer gaming subscription[121] such as PlayStation Plus, and 24% of online gamers have a content gaming subscription such as Xbox Games Pass. PlayStation Plus is the most popular subscription, used by 20% of UK online gamers aged 16+; 24% of male online gamers subscribe to PlayStation Plus, compared to 16% of female online gamers.[122]

Figure 38: Games subscription services used by UK online gamers aged 16+



Source: Ofcom Technology Tracker 2023. QE10: In the last 3 months, have you or has anyone else in your household used any of these gaming subscription services. Note: Xbox games pass includes ultimate/console/PC version. 'A game streaming service e.g. Google Stadia, GeForce Now' 1% not shown on chart. Base:16+: 855

34% of gamers play VR games using a headset. PlayStation VR remains the most popular VR headset in the UK[123]

Three per cent of UK adults play games on a VR headset, and 16-24-year-olds are more likely than 55-64-year-olds to do this (9% vs 1%).[124] Seventeen per cent of UK gamers use a tethered VR headset[125] such as PlayStation VR (PS VR), while 18% use untethered headsets[126] like the Meta Quest 2. The PS VR headsets have the highest take-up, used by 12% of UK gamers, while 8% of gamers have used a Meta Quest headset.[127] Among VR gamers, 30% use a PS VR headset, down by 4 percentage points since Q2 2022, while 21% use a Meta Quest headset, up by 2 percentage points. Adoption of the PS VR headsets has been slow, globally; less than 6% of PlayStation 4 owners have a PS VR (1st edition) headset, and less than 2% of PlayStation 5 owners have a PS VR2 headset. UK adoption may be slightly stronger than the global average.[128]

[121] Either PlayStation Plus, Xbox Live Gold or Nintendo Switch Online
[122] Ofcom Technology Tracker 2023
[123] Ampere Games – Consumer, Q2 2023, gamers aged: 13-64, UK.
[124] Ofcom Adults' Media Literacy Tracker 2022: Core survey.
[125] Tethered VR headsets require a constant connection to an external processing device such as a computer or video game console.
[126] Untethered headsets can either have purpose-built hardware with all the necessary components such as the screen, processor, and sensors built into the headset itself or mobile VR users can attach their smartphones into the headset case.
[127] Ampere Games - Consumer, Q2 2023, gamers aged: 13-64, UK.
[128] Ampere Games - Consumer, Q2 2022 & Q2 2023, VR gamers aged: 13-64, UK.

Candy Crush Saga maintains its position as the top-reaching games app, but newcomer Royal Match is not far behind

Thirty-nine per cent of UK smartphone users aged 16+ use at least one games app on their smartphone.[129] *Candy Crush Saga* remains the top-reaching games app, visited by 2.5 million adults in May 2023. *Royal Match* (like *Candy Crush*, a free-to-play puzzle video game) is the second most popular games app, reaching almost 2 million adults in May 2023, two years after its launch. Augmented reality (AR) game *Pokémon GO* was the third most popular games app among UK adults.[130] In 2023, 4% of British adults said they played AR games at least monthly.[131] *Monopoly GO!*, a games app that blends elements from the board game with new locations and social interactions to encourage friends to play together, launched in April 2023, and by May 2023 was the tenth-highest-reaching gaming app, reaching 900k adults.[132]

[129] Ofcom Technology Tracker 2023
[130] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.
[131] IPA TouchPoints 2023 Superhub. Base: GB adults age 18+.
[132] Ipsos, Ipsos iris Online Audience Measurement Service, Monopoly GO!, May 2023, age: 18+, UK.

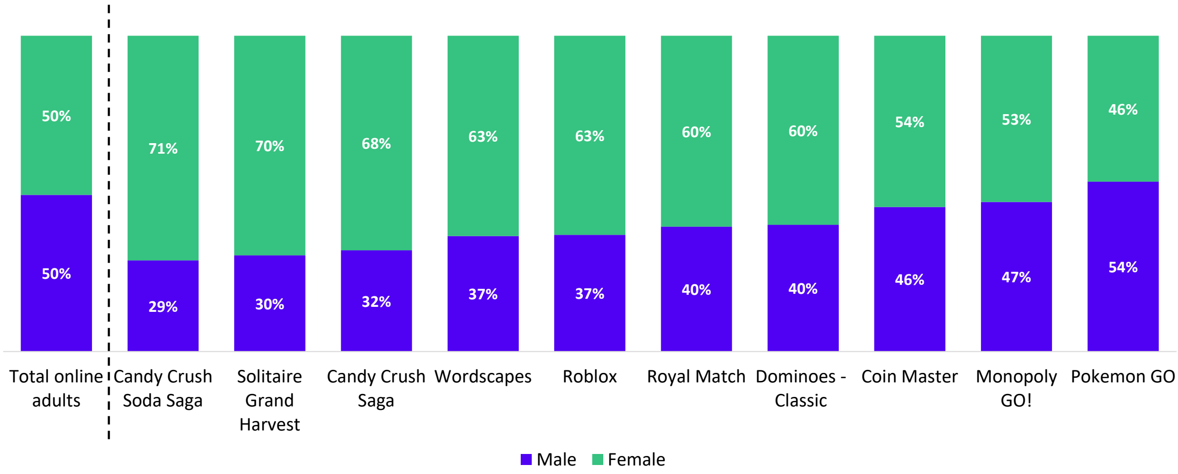
Figure 39: Top ten games apps across smartphone and tablet, by UK online adult reach: May 2023

May 2023 rank by reach	Gaming app	Adult audience in month			Online adult reach in May 2023	Average time spent per day by visitor in month (mins:secs)			Average daily adult reach		
		May 2022	May 2023	Year-on-year change		May 2022	May 2023	Year-on-year change	May 2022	May 2023	Year-on-year change
1	Candy Crush Saga	2.13m	2.54m	+ 410k	5.3%	15:44	23:46	+08:02	0.96m	1.13m	+0.16m
2	Royal Match	0.70m	1.98m	+ 1.28m	4.1%	12:21	10:27	-01:54	0.21m	0.76k	+0.55m
3	Pokémon GO	1.62m	1.87m	+ 250k	3.9%	14:45	27:35	+12:50	0.72m	1.00m	+0.29m
4	Roblox	1.26m	1.63m	+ 370k	3.4%	14:32	14:53	+00:21	0.28m	0.37m	+0.08m
5	Solitaire - Grand Harvest	1.47m	1.52m	+ 50k	3.2%	12:44	17:08	+04:24	0.61m	0.71m	+0.09m
6	Coin Master	1.03m	1.45m	+ 420k	3.0%	07:40	11:33	+03:53	0.39m	0.71m	+0.32m
7	Dominoes - Classic Edition	-	1.44m	-	3.0%	-	00:19	-	-	0.09m	-
8	Candy Crush Soda Saga	0.75m	1.13m	+ 382k	2.4%	17:15	14:46	-02:29	0.30m	0.46m	+0.16m
9	Wordscapes	0.88m	1.11m	+227k	2.3%	15:58	13:47	-02:11	0.42m	0.42m	+0.003m
10	Monopoly GO!	0	0.90m	+0.90m	1.9%	0	11:51	+ 11:51	0	0.29m	+0.29m

Source: Ipsos, Ipsos iris Online Audience Measurement Service, Mobile app, May 2023, age: 18+, UK. Note: Custom-defined list by Ofcom. Dash for Dominoes – Classic Edition represents no data was reported in Ipsos iris for the app in May 2022. Monopoly GO! Reach for May 2022 is 0 as it launched in April 2023. Average time spent based on average time spent per visitor in month divided by number of days in month.

Nine of the top ten gaming apps are more popular with women than men. In May 2023, 804k women visited the *Candy Crush Soda Saga* app, making up 71% of its total UK adult visitors that month. *Pokémon GO* was the only app in the top ten whose audience comprised slightly more men than women.[133]

Figure 40: Top ten gaming apps by UK adult reach, audience composition, by gender: May 2023



Source: Ipsos, Ipsos iris Online Audience Measurement Service, Mobile app, May 2023, age: 18+, UK.
Note: Custom-defined list by Ofcom.

Roblox is the top-reaching games app among online children aged 8-12

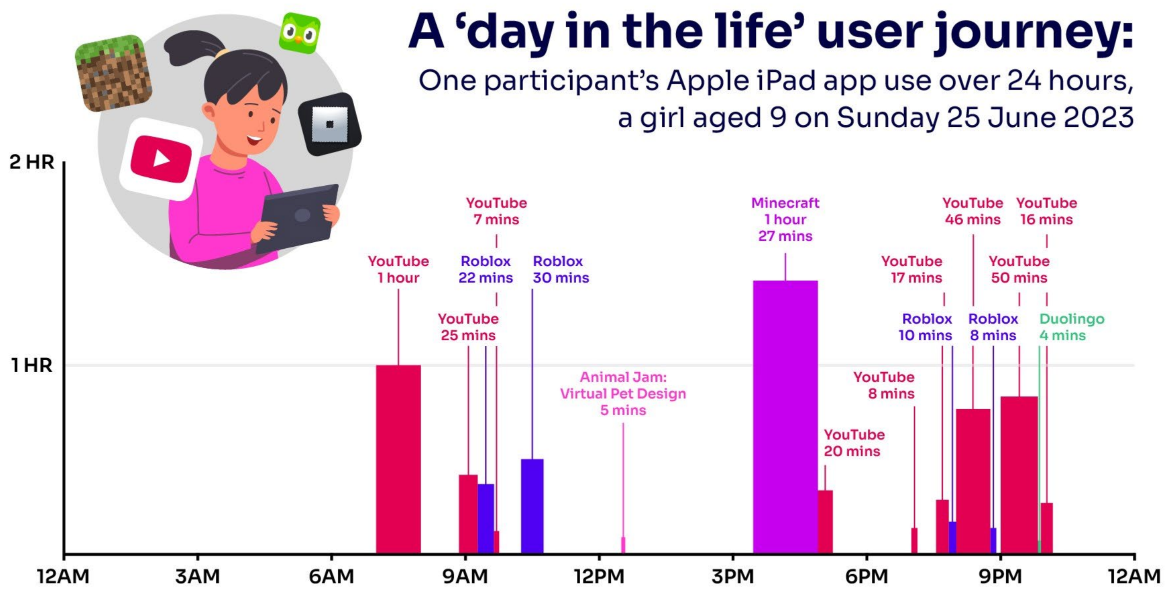
In line with Ofcom's 2022 media literacy research, our Children's Online Passive Measurement pilot study indicates that 93% of online children aged 8-12 played a game via an app during our research fieldwork period. The most popular game app was *Roblox*, which was played by nearly two-thirds (62%) of UK online children aged 8-12 (64% visited the *Roblox* site or app). Sixty-two per cent of tablet-using online 8-12 year olds visited the *Roblox* site or app while 56% of smartphone users also visited the service.[134] *Roblox* is also available on the Xbox, which was not a device measured in our study, and in October 2023 it became available on PlayStation 4 and 5. Ampere Analysis research found that *Roblox* was played by 0.57 million UK Xbox console gamers in August 2023.[135] Ipsos iris data found that 2 million (4%) UK online adults visited *Roblox* via the website or app.[136] *Roblox* web or app 8-12 year olds users spent on average 26 minutes per day on the service. Girls spent more time than boys – 30 minutes versus 21 minutes. And 8-10 year olds spent 32 minutes per day, while online 11-12s spent 17 minutes per day on average.

Figure 41 is a visual representation of a female 9-year-old participant's use of apps on an iPad only. She plays both *Roblox* and *Minecraft*. We found that 9% of the participants in our study used *Roblox*

[133] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.
[134] Ofcom Ipsos Children's Passive Measurement 2023, age: 8-12, UK. Base: 162. Reach based on seventeen children measured over three-week period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.
[135] Ampere Games – Analytics, August 2023, UK
[136] Ipsos, Ipsos iris Online Audience Measurement Service, Roblox, May 2023, age: 18+, UK.

and *Minecraft* apps during our fieldwork,[137] but it should be noted that these games can be played on consoles, which were not measured in this study, so there may be more participants who used both these games. The girl visited Duolingo during her iPad session, when she also visited YouTube and Roblox. Duolingo has *Duolingo Game Hub*[138], a space that includes Duolingo-associated games, available in Roblox. Duolingo uses Roblox to remind learners to use the app for their daily lesson. In our example in Figure 41 it is likely that the child was watching videos related to *Roblox* on YouTube due to its close proximity to Roblox use, and this may have included a Duolingo Roblox game.

Figure 41: A 'day in the life' user journey: One participant's Apple iPad app use over 24 hours, a girl aged 9 on Sunday 25 June 2023



Source: Ofcom Ipsos Children's Passive Measurement 2023, girl aged 9, UK. Note: app use only; website visits on device are excluded.

All the other games apps measured in our study had a reach of 15% or less among online 8-12 year-old children

Magic Tiles 3, a music game where players press piano keys at the right moment to perform different songs, was the second-highest-reaching games app among online 8-12s (15%) but far behind the reach of *Roblox*. It was predominantly played on smartphones, with 16% of online 8-12 year olds visiting the game on smartphones, and 5% using a tablet. *Toca Life World*, a story and world creation game, was the third-highest-reaching app, and was more popular with online 8-12 year old girls (23%) than boys (4%); on average, 8-12 year olds spent 6 minutes per day on the app. Football games apps were predominantly visited by boys; 71% of the *FIFA* soccer app 8-12-year-old visitors were boys, and 77% of *Madfut 23* app visitors were boys.[139]

[137] Ofcom Ipsos Children's Passive Measurement 2023, age: 8-12, UK. Base: 162. Seventeen children were measured for three weeks in January-February 2023 combined with results from 145 children who were measured for four weeks over the period April-July 2023. Due to low base sizes data should be treated as indicative only and not representative.
[138] Roblox, Duolingo Game Hub, accessed 25 October 2023.
[139] Ofcom Ipsos Children's Passive Measurement 2023, app only, age: 8-12, UK. Base: 162. Reach based on seventeen children visiting service at least once over three-week measurement period in January-February 2023 combined with

Figure 42: Top ten games apps among online children: 2023

Gaming app	Online children aged 8-12	Rank	Gaming app	Children aged 15-17 May 2023	Online aged 15-17 reach in May 2023
Roblox	62%	1	**Roblox**	184k	8.4%
Magic Tiles 3	15%	2	**Dominoes – Classic**	141k	6.5%
Toca Life World	14%	3	**Chess – Play and Learn**	136k	6.3%
Minecraft	10%	4	**Pokémon GO**	132k	6.1%
FIFA Soccer	9%	5	**8 Ball Pool**	116k	5.3%
Among Us	9%	6	**Clash of Clans**	108k	5.0%
Subway Surfers	8%	7	**Coin Master**	77k	3.5%
Madfut 23	8%	8	**Candy Crush Saga**	68k	3.1%
Football Strike	6%	9	**Clash Royale**	66k	3.0%
Pokémon GO	6%	10	**BitLife**	54k	2.5%
Stumble Guys	6%	-			

Source: Ofcom Ipsos Children's Passive Measurement 2023, age: 8-12, UK. Base: 162. Reach based on seventeen children visiting app at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. / Ipsos, Ipsos iris Online Audience Measurement Service, Mobile/Tablet app, May 2023, UK. Note: Custom-defined list by Ofcom. Due to low base sizes for 8-12 and 15-17 data should be treated as indicative only and not representative.

Education

Education services are diverse and rely on a variety of business models to generate revenue. Monetisation consists mainly of advertising on free versions of the service and subscriptions with extra functionality and an ad-free experience.

Times Tables Rockstars and Duolingo were the most popular educational services used by online 8-12s

Our children's online passive measurement pilot study indicates that seven in ten online children aged 8-12 visited an educational service during our fieldwork period. The most popular educational services were Times Tables Rockstars (14%) and Duolingo (10%). Our research did find differences

results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base sizes data should be treated as indicative only and not representative.

between ages for some services, such as Times Tables Rockstars, which was more likely to be used by online 8-10 year olds (21%) than online 11 and 12 year olds (3%) and Blooket (a gamified learning platform where teachers host games through question sets and students answer on their own devices), more likely to be used by online 11-12s (12%) than online 8-10s (2%).[140]

Seven percent of online 8-12 years old visited the BBC Bitesize website during the pilot study.[141] Our BBC Performance Tracker found that over half (54%) of 8-11-year-olds and 60% of 12-16-year- olds said they used BBC Bitesize for schoolwork or homework.[142]

Figure 43: Top five education services among online children: 2023

Rank	Service	Online 8-12 year old reach	Online aged 8-10 reach	Online aged 11-12 reach
1	**Times Tables Rockstars**	14%	21%	3%
2	**Duolingo**	10%	7%	14%
3	**BBC Bitesize**	7%	9%	5%
4	**Blooket**	6%	2%	12%
5	**Quora**	5%	6%	3%
-	**Purple Mash**	5%	6%	3%
-	**WikiHow**	5%	3%	8%
-	**Google classroom app**	5%	-	12%

Rank	Service	Children aged 15-17 May 2023	Online aged 15-17 reach in May 2023
1	**Wikimedia**	1.0m	46%
2	**Quora**	909k	40%
3	**The Student Room**	409k	18%
4	**WikiHow**	350k	15%
5	**DuoLingo**	311k	14%

Source: Ofcom Ipsos Children's Passive Measurement 2023, age: 8-12, UK. Base: age 8-10: 97, age 11-12: 65. Reach is based on: Seventeen children being measured for three weeks in January-February 2023 while 145 children were measured for four weeks over the period April-July 2023. See Methodology for further details. / Ipsos, Ipsos iris Online Audience Measurement Service, Ranking report, Category: Education, May 2023, age: 15-17, UK. Note: Custom-defined list by Ofcom. Due to low base sizes for 8-12 and 15-17 data should be treated as indicative only and not representative.

[140] Ofcom Ipsos Children's Passive Measurement 2023, age: 8-12, UK. Base: age 8-10: 97, age 11-12: 65. Reach based on seventeen children visiting service at least once over three-week measurement period in January-February 2023 combined with results from 145 children who were measured for four weeks during April-July 2023. Data is not weighted. Due to low base size data should be treated as indicative only and not representative.

[141] Ibid.

[142] Ofcom BBC Performance Tracker 2022/23.

News

Some online news services are delivered by traditional broadcast or print news providers while others may be ‘online native’. Some services, like Apple News, are news aggregators, bringing together news stories from a variety of sources.

Online news services generate their revenue primarily through advertising, although subscriptions have grown consistently over the last few years, commanding a significant minority of online news advertising revenue. Digital advertising for news brands in the UK amounted to £635m in 2022, according to AA/WARC. The BBC is the only news organisation in the UK which does not employ either business model, as it is fully supported by the licence fee.

The BBC is the online news service with the highest reach across all nations of the UK

On an average day, almost one in three (31%) UK online adults visited the BBC online news service in May 2023, down 6 percentage points from the same period in 2022 (37%). Behind the BBC was the Apple news aggregator, visited by 20% of UK online adults daily, in line with May 2022, followed by the Daily Mail (Mail Online), visited by 10%; The Sun, visited by 8%; and The Guardian, by 7%. Eight of May 2022’s top ten news services saw their adult audience reach decrease over the year. The local news services Metro (May 2023: 11.1 million, May 2022: 15.2m (-4.1 million year on year) and Manchester Evening News (May 2023: 14.7 million, May 2022: 9.6m, (-5.1 million year on year) had a steep reduction in the number of adults visiting their services, both falling out of the top ten in May 2023.[143]

While the BBC, The Sun and Mail Online all featured prominently in all four UK nations (see Figure 44 below), national titles continued to have high levels of reach across the devolved nations. In May 2023, Wales Online was the second-highest-reaching news service in Wales, reaching 52% of online adults in Wales. Similarly, Belfast Live (58%) and Belfast Telegraph (52%) were the second- and third-highest-reaching news services among online adults in Northern Ireland, while the Daily Record (42%) and The Scotsman (28%) were the fourth- and tenth-highest-reaching news services among online adults in Scotland. [144]

Despite the majority of its content sitting behind a paywall, The Telegraph appeared in the top ten across the UK (ninth), in England (ninth) and Wales (tenth).[145]

[143] Ipsos, Ipsos iris Online Audience Measurement Service, Ranking report, May 2022 and May 2023, age: 18+, UK. Note: Access to news brands via Apple News not included.
[144] Ipsos, Ipsos iris Online Audience Measurement Service, May 2022 and May 2023, age: 18+, UK. Note: Access to news brands via Apple News not included.
[145] Ipsos, Ipsos iris Online Audience Measurement Service, The Telegraph, May 2023, age: 18+, UK. Note: Access to news brands via Apple News not included.

Figure 44: UK online adult reach of top ten online news services, by UK nation: May 2023

	UK				England		Scotland		Wales		Northern Ireland	
Rank May 2023	**Brand**	**Audience May 2022**	**Audience May 2023**	**Year-on-year (YOY) change**	**Brand**	**Audience May 2023 (May YOY change)**	**Brand**	**Audience May 2023 (May YOY change)**	**Brand**	**Audience May 2023 (YOY change)**	**Brand**	**Audience May 2023 (May YOY change)**
1	BBC	35.6m	33.5m	-2.0m	BBC	28.1m (-1.7m)	BBC	2.8m (-0.2m)	BBC	1.6m (-0.1m)	BBC	1.0m (-0.1m)
2	Mail Online	22.8m	23.9m	+1.1m	Mail Online	20.2m (+0.9m)	The Sun	2.0m (-0.2m)	Wales Online	1.2m (-0.2m)	Belfast Live	0.7m (+0.02m)
3	The Sun	24.4m	21.9m	-2.4m	The Sun	18.3m (-1.9m)	Mail Online	2.0m (+0.1m)	Mail Online	1.1m (+0.1m)	Belfast Telegraph	0.6m (+0.02m)
4	Mirror	22.4m	20.0m	-2.4m	Mirror	16.9m (-1.9m)	Daily Record	1.7m (-0.1m)	The Sun	1.0m (-0.2m)	Mail Online	0.6m (-0.03m)
5	Apple News	17.7m	18.7m	+1.0m	Apple News	16.0m (+0.8m)	Apple News	1.6m (+0.2m)	Mirror	0.9m (-0.2m)	The Sun	0.6m (-0.1m)
6	The Independent	17.8m	17.5m	-0.3m	The Guardian	14.7m (-1.8m)	The Independent	1.6m (+0.05m)	The Independent	0.9m (-0.003m)	Mirror	0.6m (-0.1m)
7	The Guardian	19.6m	17.1m	-2.5m	The Independent	14.7m (-0.3m)	Mirror	1.6m (-0.2m)	The Guardian	0.7m (-0.2m)	The Independent	0.5m (-0.01m)
8	Sky News	13.1m	14.2m	+1.1m	Sky News	12.0m (+0.9m)	The Guardian	1.3m (-0.3m)	Sky News	0.7m (+0.1m)	Apple News	0.5m (+0.04m)
9	The Telegraph	12.5m	13.4m	+0.8m	The Telegraph	11.4m (+1.0m)	Sky News	1.1m (+0.1m)	Apple News	0.7m (-0.01m)	Sky News	0.4m (-0.01m)
10	Daily Express	15.4m	12.7m	-2.7m	Daily Express	10.7m (-2.2m)	The Scotsman	1.1m (-0.3m)	The Telegraph	0.6m (+0.04m)	The Guardian	0.4m (-0.2m)

Source: Ipsos, Ipsos iris Online Audience Measurement Service, Ranking report, Category: News, May 2023, age: 18+, UK. Note: Access to news brands via Apple News not included.

Retail

Online retail services allow users to purchase goods or services directly from a website or app. Users can often browse, search, and pay for products through the service. Some retail services also allow users to review products and post messages. Online marketplaces such as eBay and Etsy allow users to buy and sell goods or services. They often allow users or providers to create pages that advertise their products. Users can often search for content and send direct messages to other users. Retail services generate revenue via a range of revenue streams including sales, hosting third-party sellers, subscriptions and advertising. The Office for National Statistics found that internet sales constituted 25% of total retail sales in the UK in the second quarter of 2023 – a year-on-year decline of 1pp (Q2 2022: 26%).[146]

Amazon remains the UK's leading online retailer, but new entrant Temu had the third highest reach just five months after its UK launch

Eighty-seven per cent of UK online adults visited Amazon in May 2023, and 25 years since its launch in the UK,[147] the service has a sizeable lead (23pp) over the next most popular retail service, eBay, with 64% of UK adults visiting it in May 2023. Amazon was also the retail service where UK online adults spent the most time on average in May 2023 (2 hours 27 minutes per visitor).[148] Amazon stated that total revenues for its activities in the UK, which include retail, subscriptions, and business-to-business services, amounted to £24bn in 2022 (2021: £23bn).[149]

Launched in the UK in April 2023, online marketplace Temu – which is headquartered in the US but operated by the Chinese e-commerce company PDD Holdings – experienced rapid growth in UK online adult reach as it gained 13.8 million visitors (29% of UK online adult reach) in just under two months following its launch. No single demographic appears to be driving reach: Temu had the highest reach for the 35-44 age group (31% online reach, 2.6 million visitors) and the lowest for the 25-34 age group (26% online reach, 2.3 million visitors) in May 2023; 33% of UK online women visited the service (8.0 million) while 24% (5.8 million) of UK online men did the same. The highest reach (32%, 701K visitors) was in Wales, of the UK nations, and the lowest was in Northern Ireland (27%, 344K visitors) in the same month.[150]

Temu focuses on value products and provides free shipping from China on almost all orders, and its popularity may be due to the rising cost of living in the UK.[151] Five months since Temu's UK launch it became the third-highest-reaching online retail service, with 44% (21.2 million) of UK online adults visiting the service in August 2023, and each visitor spending on average more than an hour on the service in the month (1 hr 9 min). Temu's growth appeared to have plateaued by August 2023, as its UK online adult reach was at 44%, having reached 45% the previous month.[152] In May 2023, 32% of

[146] Office for National Statistics, Internet sales as a percentage of total retail sales (ratio) (%), May 2023.
[147] Amazon, Amazon celebrates most popular UK innovations to mark 25th anniversary, 18 September 2023
[148] Ipsos, Ipsos iris Online Audience Measurement Service, Amazon and Ebay, May 2023, age: 18+, UK.
[149] Amazon News, 2022: Amazon's Economic Impact in the UK, 1 June 2023
[150] Ipsos, Ipsos iris Online Audience Measurement Service, Temu, May 2023, age: 18+, UK.
[151] Reuters, China's e-commerce discount race to the bottom puts incumbents under pressure, 26 September 2023
[152] Ipsos, Ipsos iris Online Audience Measurement Service, Temu, May, July and August 2023, age: 18+, UK.

Amazon's visitors also visited Temu; by August 2023, this figure had increased to 48%.[153] Amazon remained the top-reaching service in August 2023 with 88% (41.9 million) UK online adult reach, followed by eBay (64%, 30.7 million).[154]

While Amazon remains the most-visited retail brand across all age groups, the popularity of other retail brands varies by age. Online food delivery services and second-hand online marketplaces are more popular with younger age groups: Uber Eats is ranked fifth at 32% (1.7 million) online reach for 18-24-year-olds, while Vinted – an online marketplace mainly for second-hand clothing and accessories – was ranked eighth (30% online reach, 1.6 million) in May 2023. Conversely, no online food delivery services or second-hand online marketplaces were in the top ten for over-54s in May 2023. Traditional grocery retailers are more popular with older age groups, with Tesco (ranked fourth, 37% online reach, 6.3 million), Marks & Spencer (ranked fifth, 33% online reach, 5.7 million), ASDA (ranked eighth, 27% online reach, 4.7 million), Sainsbury's (ranked ninth, 25% online reach, 4.3 million) and Lidl UK (ranked tenth, 25% online reach, 4.3 million) appearing in the top ten most popular retail brands for over-54s. Tesco was the only grocery retailer to appear in the top ten for 18-24s (ranked seventh, 31% online reach, 1.6 million).[155]

[153] Ipsos, Ipsos iris Online Measurement Service, Cross-Visiting Report, May & August 2023, age: 18+, UK.
[154] Ipsos, Ipsos iris Online Audience Measurement Service, August 2023, age: 18+, UK.
[155] Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age: 18+, UK.

Figure 45: Top ten retail brands among UK online adults: May 2023

Rank May 2023	Retail brand	Online adult reach in May 2023	Online adult audience in May 2022	Online adult audience in May 2023	Year-on-year change	Average time spent in May 2022 per visitor (hrs:mins)	Average time spent in May 2023 per visitor (hrs:mins)	Year-on-year change (hrs:mins)
1	**Amazon**	87%	41.9m	41.4m	- 0.4m	02:14	02:27	+ 00:13
2	**eBay**	64%	31.3m	30.5m	- 0.8m	01:47	01:45	- 00:03
3	**Apple**	44%	21.3m	20.9m	- 0.4m	00:19	00:21	+ 00:02
4	**Tesco**	39%	16.9m	18.4m	+ 1.6m	00:26	00:25	- 00:02
5	**Argos**	34%	16.5m	16.1m	- 0.4m	00:11	00:11	+ 00:00
6	**ASDA**	30%	10.9m	14.5m	+ 3.6m	00:21	00:22	+ 00:02
7	**Temu**	29%	0	13.8m	+ 13.8m	0	00:35	+ 00:35
8	**Etsy**	27%	12.6m	13.0m	+ 0.4m	00:21	00:16	- 00:05
9	**Marks & Spencer**	26%	11.5m	12.4m	+ 0.9m	00:13	00:19	+ 00:06
10	**Boots**	25%	12.6m	12.0m	- 0.5m	00:09	00:10	+ 00:01

Source: Ipsos, Ipsos iris Online Audience Measurement Service, Category: Retail & Commerce, May 2023, age: 18+, UK. Note: custom defined list by Ofcom.

The online experience

Our latest research into people's experiences of and attitudes to being online reveals some ambivalence among users. They highly value the internet's ability to connect, entertain and educate. Yet potential harms are never far away and are encountered by the majority of users in one form or another. Online experiences vary, and this chapter shows how users of different ages, characteristics and backgrounds can have very different online experiences and attitudes, for better or for worse.

Introduction

This chapter looks at adults' and children's experiences of being online and focuses both on the positive and beneficial experiences people have and the potentially harmful content or behaviour they encounter. Where possible, the chapter examines adults' and children's online experiences separately. [156]

[156] Unless referenced otherwise, the figures cited throughout this chapter will be from wave 4 OET data.

Online experience among internet users aged 13+, by nation: 2023

England

66%
say they have a good balance with their online and offline life.

68%
say they have encountered potentially harmful behaviour or content.

59%
took any form of action as a result of encountering their most recent potential harm.

31%
say they are satisfied with the reporting process.

Top harms encountered

Misinformation (39%)

Generally offensive bad language (37%)

Scams, fraud, phishing (35%)

Scotland

68%
say they have a good balance with their online and offline life.

68%
say they have encountered potentially harmful behaviour or content.

58%
took any form of action as a result of encountering their most recent potential harm.

36%
say they are satisfied with the reporting process.

Top harms encountered

Misinformation (40%)

Scams, fraud, phishing (37%)

Generally offensive bad language (36%)

Wales

69%
say they have a good balance with their online and offline life.

63%
say they have encountered potentially harmful behaviour or content.

60%
took any form of action as a result of encountering their most recent potential harm.

34%
say they are satisfied with the reporting process.

Top harms encountered

Misinformation (37%)

Generally offensive bad language (34%)

Scams, fraud, phishing (32%)

Northern Ireland

64%
say they have a good balance with their online and offline life.

71%
say they have encountered potentially harmful behaviour or content.

61%
took any form of action as a result of encountering their most recent potential harm.

46%
say they are satisfied with the reporting process.

Top harms encountered

Misinformation (44%)

Scams, fraud, phishing (39%)

Generally offensive bad language (38%)

Source: Ofcom, Online Experiences Tracker 2023.

The risks and rewards of the internet

Attitudes are complex and often ambivalent, with adults recognising the benefits of being online at a personal level, but less so for society overall

When asked to consider the impact of being online, 71% of adult internet users agree that for them *personally* the benefits of being online outweigh the risks. Just 6% disagree, with nearly a quarter unsure (23%).

For adults, being online is felt to provide opportunities for connection, education, and entertainment. Seventy per cent agree that being online has helped them to learn a new skill, and three-quarters agree that being online has helped them broaden their understanding or view of the world.[157] Similarly, 77% of those who use online communications platforms agree that these help them stay in contact with friends and family.[158] Users who said they used a wide range of sites and apps tended to agree more with the statements than the average user, suggesting that their breadth of use opens opportunities to engage more with the advantages that being online provides.[159] When asked about their relationship with being online, most adult internet users felt that they had a good balance between their online and offline life (67%).

When considering the impact of the internet on society, the picture changes somewhat. While 40% of adult internet users feel that it is good for society, and a minority (15%) disagree, 45% say they feel neutral about it. This neutral response, from almost half of UK adult internet users, indicates that a sizeable proportion are less convinced of the benefits the internet brings to society than they are about the benefits that they get personally.

Certain groups of adults are more likely than the average to say that the benefits outweigh the risks; this includes men (74%), younger adults aged 25-34 (75%) and bisexual people (81%). Some adults who are more likely to say that the benefits outweigh the risks are less likely to say they have a good balance between their online and offline life: men (64%), 25-34-year-olds (61%) and bisexuals (58%). Further distinctions among groups of adults are evident when thinking about the impact on society. Women (34%) and adults with a limiting and impacting condition (38%) are less likely to agree with the statement '*the internet is good for society*'.

Figure 46: Adults' attitudes on the personal benefits and risks of going online, by subgroup: 2023 'The benefits of going online outweigh the risks' vs. 'For me personally, the risks of going online outweigh the benefits.'

Demographic groups		Benefits outweigh the risks	Neutral	Risks outweigh the benefits
Gender	Women	67%	27%	6%

[157] Ofcom Adults' Media Literacy Tracker 2022: Core survey.
[158] Ofcom Adults' Media Literacy Tracker 2022: Online Behaviours and Attitudes survey. 'Online communication platforms' encompass four categories of use: using apps or sites to send messages, chat or make voice or video calls; watching/uploading content on video-sharing platforms; using social media apps or sites; and using live streaming apps or sites to view/share content.
[159] Ofcom Adults' Media Literacy Tracker 2022: Core survey; Online Behaviours and Attitudes survey.

Demographic groups		Benefits outweigh the risks	Neutral	Risks outweigh the benefits
	Men	74%	19%	6%
Age	18-24	70%	21%	9%
	25-34	75%	20%	5%
	35-44	73%	22%	5%
	45-54	73%	22%	5%
	55+	66%	27%	7%
Ethnicity	White	72%	22%	6%
	Minority ethnic group	59%	29%	13%
Sexuality	Heterosexual	70%	24%	6%
	Gay or lesbian	80%	16%	4%
	Bisexual	81%	14%	5%
Limiting or impacting condition	Limiting or impacting condition	68%	25%	7%
	No limiting or impacting condition	74%	21%	6%

●Signifies higher than the total at 99% confidence

●Signifies lower than the total at 99% confidence

Source: Ofcom, Online Experiences Tracker 2023. Q1. 'For me personally, the benefits of going online outweigh the risks'' vs. 'For me personally, the risks of going online outweigh the benefits' Base: UK internet users, aged 18+ (13,205).

Figure 47: Adults' attitudes on the positives and negatives of the internet for society, by subgroup: 2023 'The internet is good for society vs. The internet is damaging to society.'

Demographic groups		Internet is good for society	Neutral	Internet is damaging for society
Gender	Women	34%	50%	16%
	Men	47%	40%	14%
Age	18-24	41%	45%	15%
	25-34	42%	45%	13%
	35-44	41%	46%	13%
	45-54	41%	44%	15%

Demographic groups		Internet is good for society	Neutral	Internet is damaging for society
	55+	39%	45%	16%
Ethnicity	White	40%	45%	15%
	Minority ethnic group	42%	44%	14%
Sexuality	Heterosexual	40%	45%	15%
	Gay or lesbian	48%	41%	11%
	Bisexual	43%	45%	12%
Limiting or impacting condition	Limiting or impacting condition	38%	45%	17%
	No limiting or impacting condition	42%	44%	13%

•*Signifies higher than the total at 99% confidence*

•*Signifies lower than the total at 99% confidence*

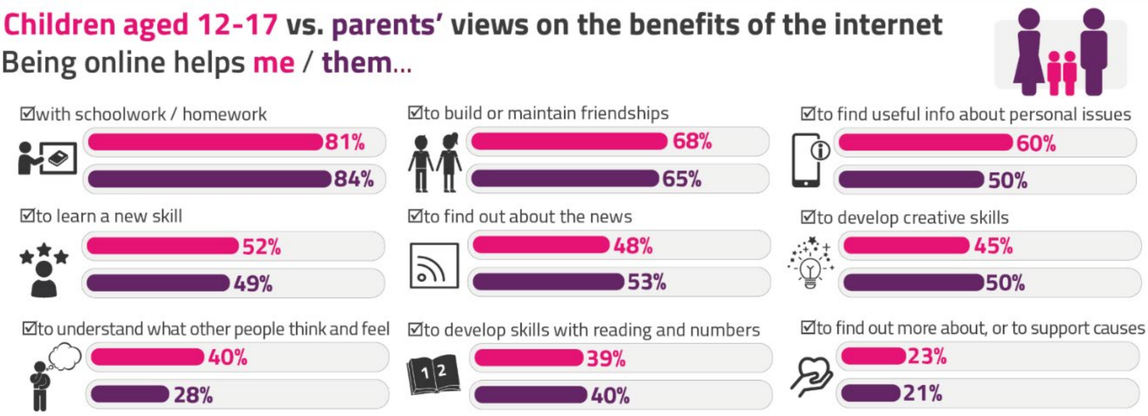
Source: Ofcom, Online Experiences Tracker 2023. Q1. 'The internet is good for society vs. The internet is damaging to society.' Base: UK internet users, aged 18+ (13,205).

Children say they are confident online communicators and tend to believe that the internet brings them a number of benefits as they grow up.

Children and their parents tend to agree that being online provides children with opportunities and benefits. Ofcom's Children and parents: media use and attitudes report shows that children aged 12-17 and parents of children in this age group recognise the benefits of going online. Most notably, similar proportions of 12-17-year-olds and parents of children this age identify that going online can help with schoolwork/homework (81% of children, up from 77% in 2021, 84% parents), building or maintaining friendships (68% of children, up from 64% in 2021, 65% parents), and finding useful information about personal issues (60% children, 50% parents).[160]

[160] Ofcom, Children and parents: media use and attitudes report, 2023.

Figure 48: Children's and parents' views on the benefits of the internet.



Source: Ofcom, Children and parents: media use and attitudes report, 2023: Parents Only survey and Online Knowledge and Understanding survey. QC13. Being online can help you do many different things. Which of these does it help you with? Base: Children aged 12-17 who go online (1,225) QP53. 'Thinking about what your child does online, which – if any – of these applies to them? Being online helps them...' Base: Parents of children aged 12-17 who go online (1,004)

For children, the internet is felt to bring specific benefits that help them as they grow up and learn to navigate the world. Ofcom research found that 81% of children aged 8-15 agree that being online allows them to be creative. A similar proportion (80%) agree that they '*can find help in general from being online such as life hacks and fashion trends*'; girls are more likely than boys (86% vs 75%), and secondary school aged children more likely than primary school aged children (87% vs 73%) to agree with this statement. Most children aged 8-15 also agree that "*being online helps me get better at things I like doing*" (86%).[161]

Thinking more specifically about the benefits of using social media apps or sites, 67% of children aged 8-17 say that these types of platforms make them feel happy *all or most of the time* and 66% thought that using them helps them stay close to their friends *all or most of the time.*[162]

Being online can also provide children with the opportunity to communicate, both publicly and privately. Ofcom's study into online communications among children found that 11-18s are more likely to say they feel confident communicating online than in person (71% vs 53%).[163] A recent study with children aged 8-15 further explored children's confidence in communicating online; it found that levels of confidence vary among children aged 8-15 depending on who they are communicating online with. Half of this age group agree that they 'feel confident communicating in public online, such as speaking and writing on posts, updating statuses or commenting' (50%), while two-thirds agree that they "*feel confident communicating in private online, such as speaking and writing in group chats or Messenger*" (66%). Confidence levels grow with age; secondary school aged children are more likely than those of a primary school age to agree that they feel confident communicating publicly (59% vs 41%) and privately, online (79% vs 53%).[164]

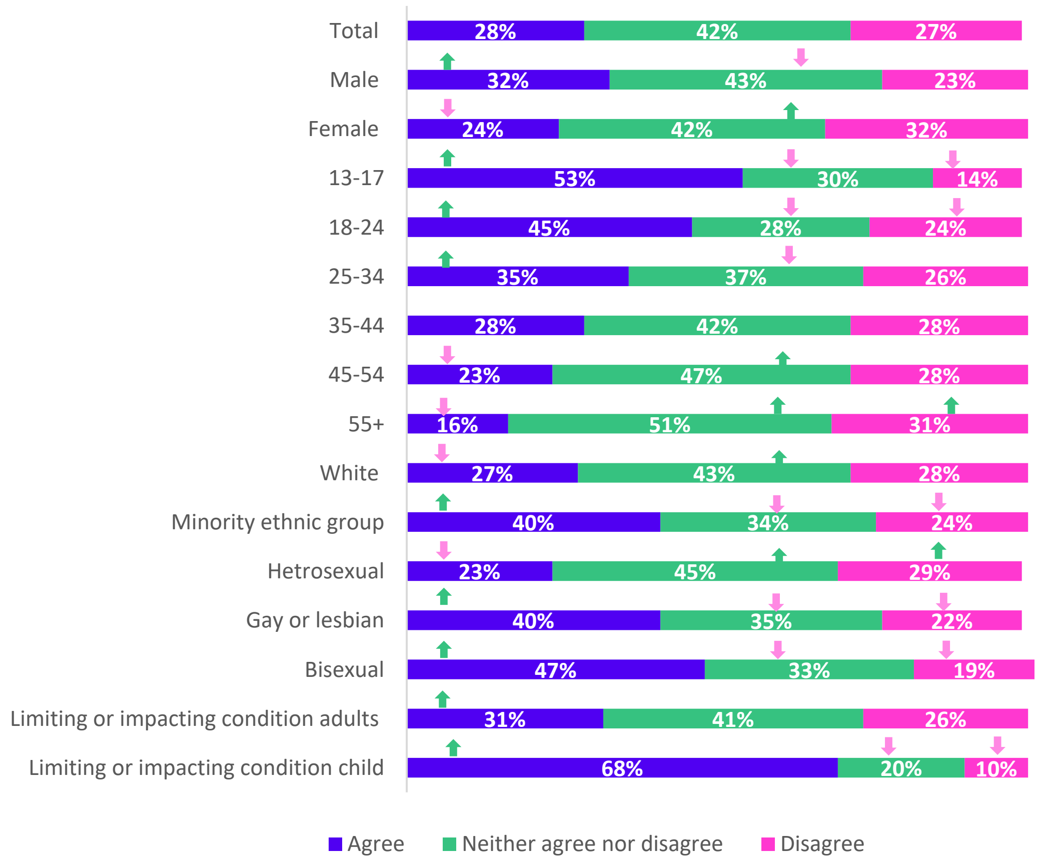
For certain adult and child user groups, the internet is valued as an enabler of self-expression

When asked to assess and rate statements about the internet and self-expression, 28% of internet users aged 13+ agree they '*feel freer to be themselves online'*, 27% disagree, and a majority feel

[161] Ofcom, Online Research Panel Poll: Children's wellbeing online, August 2023
[162] Ofcom, Children and parents: media use and attitudes report, 2023.
[163] Ofcom, Understanding online communications among children, 2023
[164] Ofcom, Online Research Panel Poll: Children's wellbeing online, August 2023

neutral about it (42%), again indicating a certain ambivalence among users overall. However, the data also clearly indicates that certain user groups value the internet highly as an enabler of self-expression. For example, users aged 13-17 are almost twice as likely to feel that they can '*be themselves online'*, compared to adult internet users (53% vs 26%); men and boys are more likely than women and girls to feel this way (32% vs 24%); adults with limiting and impacting conditions (31%), and particularly, children with limiting and impacting conditions (68%), are more likely than the average internet user to agree with the statement (28%).

Figure 49: UK internet users 13+ agreeing with the statement '*I feel more free to be myself online*', by subgroup: 2023



Signifies higher than the total at 99% confidence.
Signifies higher than the total at 99% confidence.
Source: Online Experience Tracker 2023. Q3. To what extent, if at all, do you agree or disagree with the following statements about being online? Base: UK internet users 13+ (14,181)

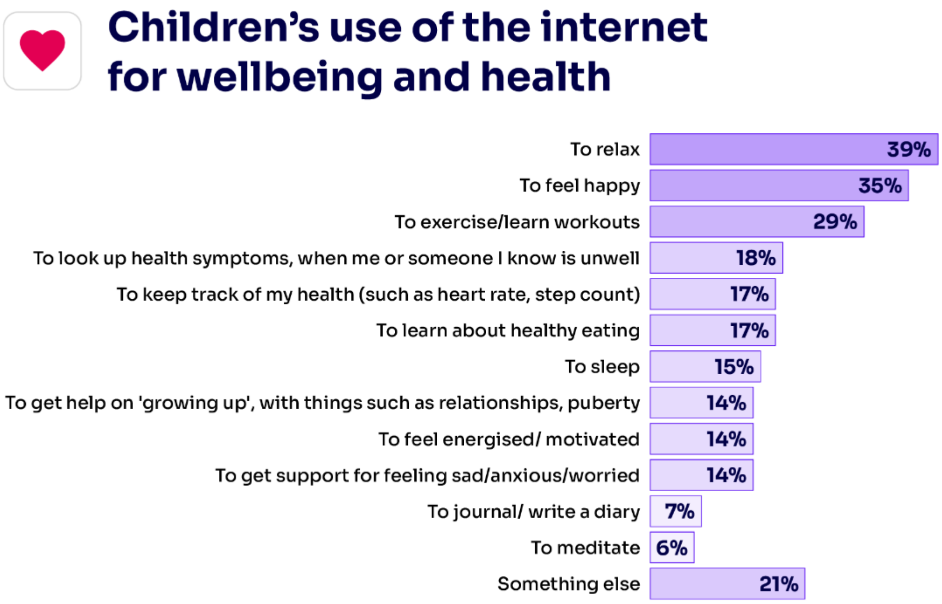
Children are more likely than adults to recognise the benefits of being online for their mental health and general wellbeing

Children aged 13-17 have a more positive outlook than adults on the relationship between being online and their mental health. Forty-eight per cent agree that being online has a positive effect on their mental health, compared to 31% of adults, with just 13% of 13-17s disagreeing. More than a third of 13-17s are undecided, possibly feeling that there are both positive and negative impacts on their mental health (35%).

Ofcom's research with children aged 8-15 also found that over half of this age group say that 'being online makes me feel better about myself' (51%), with secondary school aged children more likely than primary school aged children to feel this way (54% vs 46%). About a quarter of children disagree that being online makes them feel better about themselves, again demonstrating the mixed views among this age group (23%).[165]

Being online can provide some children with support for their wellbeing. Children aged 8-15 were asked to agree or disagree with a series of statements, including 'being online helps me feel less stressed/angry/worried'. Over half of this age group agreed with the statement (59%), while 46% agreed that being online provides them with *'health and wellbeing help, such as meditation and healthy eating'*.[166]
Overall, girls are more likely than boys to say they go online for help with things related to their health and wellbeing (81% vs 75%), and secondary school aged children are more likely than primary school aged children to use the internet in this way (83% vs 74%). To understand children's use of the internet to benefit their wellbeing and health, we provided children aged 8-15 with a series of prompts to explore what they go online for help with. Their top three choices included: going online to help them *'relax'* (39%), to help them *'feel happy'* (35%), and to help with *'exercise / learn workouts'* (29%).[167]

Figure 50: Children aged 8-15: their use of the internet for wellbeing and health.



Source: Ofcom, Online Research Panel Poll: Children's wellbeing online, August 2023. Base: children aged 8-15 (799).

Children aged 8-15 who go online for help with their wellbeing and health use a variety of resources. Using '*online videos such as TikTok or Instagram*' is the most popular way of sourcing this help. This includes using online videos to help with '*feeling happy*' (70%)', '*to relax*' (63%), '*to exercise/ learn workouts*' (65%) and '*to learn about healthy eating*' (57%).[168]
For certain things, using a search engine to find support is the most commonly used resource for children aged 8-15. About three-quarters of those who go online when they want help with '*looking*

[165] Ofcom, Online Research Panel Poll: Children's wellbeing online, August 2023. Primary school aged children' are based on those aged 8-11 and 'secondary school age children' are based on those aged 11-15. Therefore, participants aged 11 are counted as both primary and secondary school age.
[166] Ofcom, Online Research Panel Poll: Children's wellbeing online, August 2023
[167] Ofcom, Online Research Panel Poll: Children's wellbeing online, August 2023
[168] Ofcom, Online Research Panel Poll: Children's wellbeing online, August 2023

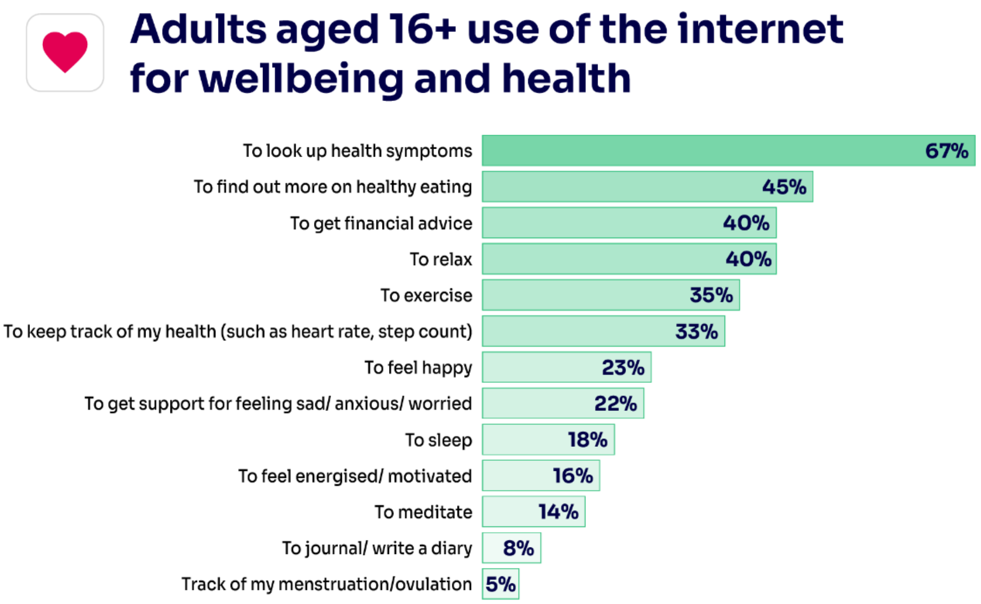
up health symptoms' say they use a search engine to do this (77%), while 58% use a search engine for help with '*growing up*'.[169]

Children also turn to online influencers for help with some of their wellbeing and health needs. About a third of children aged 8-15 who say they go online for help when they feel '*sad/anxious/worried*' seek help from '*influencers such as on TikTok or Instagram*' (32%). This is also the case for those who go online '*to learn about healthy eating*' (36%), for help with feeling '*energised/motivated*' (35%), '*to feel happy*' (32%), and '*get help on growing up*' (33%). [170]

Adults recognise that online support can help their wellbeing and seek support for different things in different places.

When looking at the impact of going online for adults' wellbeing, only a quarter of those aged 16+ agreed that '*being online makes me feel better about myself*' (24%), while over half disagreed with the statement (56%).[171] Men had a more positive outlook than women on the impact of being online (26% vs 22%). A third of those aged 16+ thought that being online was a way to '*help me feel less stressed, angry or worried*' (34%), while half disagreed with the statement (50%). Many adults recognise the support and advice they can find online, with almost half agreeing that '*being online gives me health and wellbeing help*' (49%).[172]

Figure 51: Adults aged 16+, use of the internet for wellbeing and health.



Source: Ofcom, Online Research Panel Poll: Adults' wellbeing online, September 2023 Base: 16+ (10,005). 'Track of my menstruation/ovulation' was only shown to those who said they were assigned female at birth.

To explore adults' use of the internet for their wellbeing and health, as with 8-15-year-olds, we provided adult respondents (aged 16+) with a series of prompts to explore what they go online to get help with. Two-thirds of adults said they went online '*to look up health symptoms*' (67%),

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[169] Ofcom, Online Research Panel Poll: Children's wellbeing online, August 2023
[170] Ofcom, Online Research Panel Poll: Children's wellbeing online, August 2023
[171] Participants aged 16 and above are recognised as adults in this survey.
[172] Ofcom, Online Research Panel Poll: Adults' wellbeing online, September 2023

followed by 45% going online '*to find out more on healthy eating'* and 40% using the internet '*to get financial advice'* or '*to relax'*.[173]

Like children, adults who go online for help with their wellbeing seek support in a variety of places, and these places vary depending on the support or help they need. Using a search engine is a popular method when adults want help with looking up health symptoms (81%), financial advice (75%), finding out more about healthy eating (73%) and *'to get support when feeling sad, anxious or worried'* (55%).[174] Seeking support through online videos, such as on YouTube, Instagram Reels or TikTok, is also popular among adults who go online when they want help with '*feeling happy'* (64%), exercising (63%), '*feeling energised and motivated'* (56%), keeping a journal (50%), and sleeping (41%). And for certain areas of health and wellbeing, adults turn to dedicated resources for support: when seeking help with tracking their health or tracking menstruation, the majority use dedicated apps or websites (52% and 80%) while wellness apps are popular among those who look for help with meditating (48%).[175]

Potentially harmful experiences

A note on research methodology and terminology regarding 'potential harms'

Although being online provides both adults and children with many benefits, the online environment also has the potential to expose internet users to harm. Not all occurrences of potentially harmful content or behaviour online actually result in harm being caused, so in this commentary they are referred to as 'potential harms'.

The figures relating to type and prevalence of potential harm refer to UK internet users' encounters of 'potential harm' in the four weeks before completing the OET survey. Further OET figures relating to the location, impact and response to a potential harm relate to the 'most recent encountered potential harm', indicating the most recent potentially harmful content or behaviour seen or experienced by participants in the four weeks before completing the OET survey. To capture these figures, survey participants in the OET are prompted with a list of potential harms, and their responses are based on their recall and judgement of the content and behaviours which they consider align with those listed in the questionnaire.

The list of potential harms in the OET questionnaire covers, in part, some of the content that is harmful to children, as set out in the Online Safety Act. However, they also extend to other types of content and behaviour, in order to capture a range of experiences online.[176] The data is also based on users' own categorisations of platform type, so reference to platform type in this chapter may not align with the categorisation of platform type referenced in the first chapter or within the Online Safety Act. When we discuss differences among subgroups compared to the average internet user or total, this refers to internet users aged 13+. Unless otherwise stated, the data has been significance tested at a 99% confidence interval, due to the large sample size. Finally, awareness of 'rules' on platforms, and expectations about encountering online behaviour and content referenced in this chapter, use data from our VSP tracker.

[173] Ofcom, Online Research Panel Poll: Adults' wellbeing online, September 2023
[174] Ofcom, Online Research Panel Poll: Adults' wellbeing online, September 2023
[175] Ofcom, Online Research Panel Poll: Adults' wellbeing online, September 2023
[176] A full list of potential harms used to prompt participants can be found in the questionnaire.

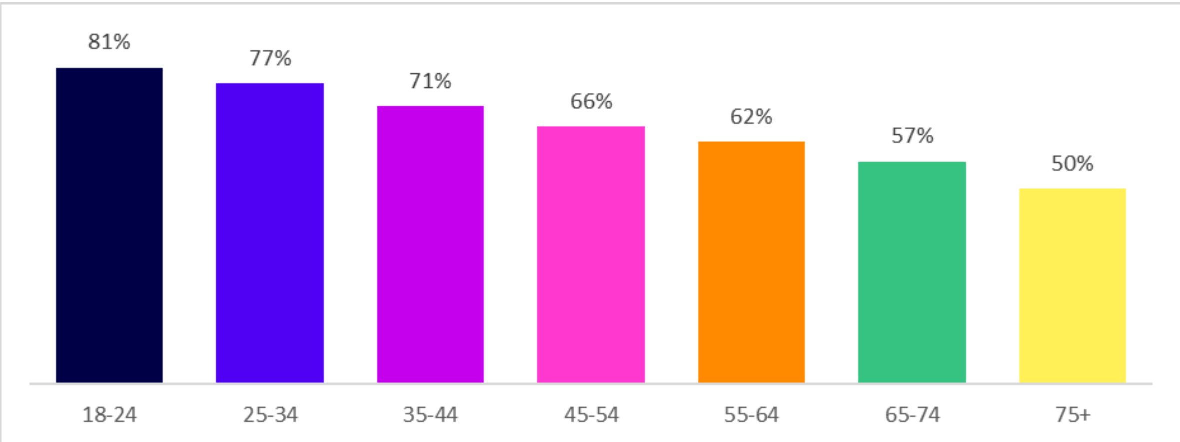
Potential harms seen or encountered online

Encounters with potential online harms decrease with age among adults but are more common among certain minority groups.

Two-thirds of adults (68%), when prompted with a list, reported that they had seen or experienced one or more potential online harms in the past four weeks. Many factors can influence the likelihood of encountering potential harmful content or behaviour online. The amount of time spent online is a key factor, with high-usage adult internet users more likely to say they have experienced potentially harmful content or behaviour compared to low-usage internet users (76% vs 52%).[177]

Younger adults, aged 18-24, are most likely to say they have encountered at least one potential harm online (81%). The rate of exposure to potential harm then decreases as user age increases, with the lowest rate of exposure to harm among the 75+ age group, at 50%. Differences between age groups may be driven by the differing amounts of time spent online: younger adults aged 18-24 are twice as likely to say they are high usage internet users compared to over-74s (50% vs 25%).

Figure 52: Adults' experience of potential harm online in the past four weeks, by age



Source: Ofcom, Online Experiences Tracker 2023. Q8 Which, if any, of the following have you seen or experienced online in the last 4 weeks? This includes any images, videos, audio or text, either comments, posts or messages you have seen and/or those shared directly to you. Please select all that apply. Base: UK internet users aged 18+ (13,205).

Certain groups of adults are more likely than the average internet user to say they encounter harm online. These include adults from a minority ethnic group (73%), those with a limiting or impacting condition (73%), gays and lesbians (77%) and bisexuals (85%). Those in a minority ethnic group (6%), adults with a limiting or impacting condition (6%), and bisexuals (10%) are also more likely than average to say they have encountered more than 16 potential harms in the past four weeks (4%).

Figure 53: Adults' experience of potential harm, by subgroup.

Demographic group		Experience of harm
Gender	Women	67%

[177] 'High-usage' relates to respondents who told us that they spend more than 22 hours online, apart from work and education, in a typical week. 'Low-usage' relates to those who told us that they spend less than 6 hours online apart from work and education in a typical week.

Demographic group		Experience of harm
	Men	69%
Ethnicity	White	67%
	Minority ethnic group	73%
Sexuality	Heterosexual	66%
	Gay or lesbian	77%
	Bisexual	85%
Limiting or impacting condition	Yes	73%
	No	65%

Signifies higher than the total at 99% confidence

Signifies lower than the total at 99% confidence

Source: Ofcom, Online Experiences Tracker 2023. Q8 Which, if any, of the following have you seen or experienced online in the last 4 weeks? This includes any images, videos, audio or text, either comments, posts or messages you have seen and/or those shared directly to you. Please select all that apply. Base: UK internet users aged 18+ (13,205).

Misinformation was the most prevalent potential harm encountered by adults, with political misinformation encountered most often.

Looking at the most prevalent potential harms encountered among all adults, misinformation is at the top of the list with nearly two in five (39%) seeing or experiencing it in the past four weeks. The top-five hierarchy of prevalence broadly aligns with the hierarchy observed in April/May 2022, although in our most recent data *'misinformation'* and '*generally offensive or bad language'* have overtaken '*scams, fraud and phishing'* as the most prevalent harms.[178]

Figure 54: Top ten potential harms experienced by adults

Potential harm	Total Adults
Misinformation i.e. false or misleading stories, claims or assertions e.g. 'fake news'	39%
Generally offensive or 'bad' language, e.g., swearing, rudeness	36%
Scams, fraud, or phishing	36%
Unwelcome friend or follow requests, or messages	30%
Trolling, i.e., a person who says something to cause intentional upset or provoke a negative reaction	23%

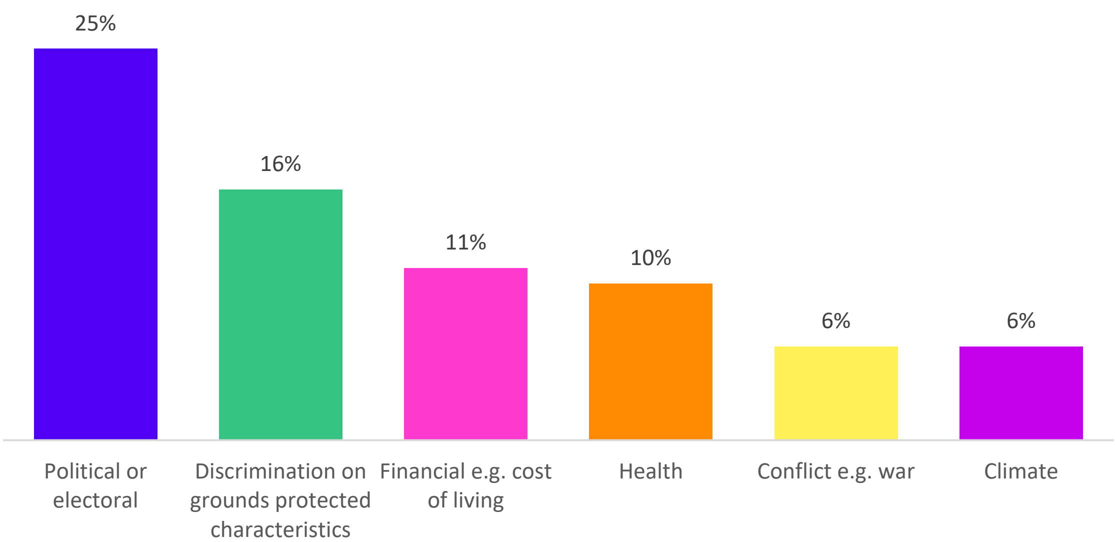
[178] Due to changes to panel provider and methodology we are unable to make direct comparison to specific data points, although in some areas we have included reference to hierarchical similarities or differences with W2. At W4 an addition of 'e.g. fake news' was included in the misinformation code, which may affect the change in hierarchy.

Potential harm	Total Adults
Hateful, offensive or discriminatory content that targets a group or person based on specific characteristics like race, religion, disability, sexuality or gender identity, e.g. hate speech	23%
Content or language which objectifies, demeans or otherwise negatively portrays women	22%
Fake or deceptive images/videos, e.g. 'deep-fakes'	18%
Paid-for or sponsored content which was not clearly marked as such, e.g. 'astroturfing'	17%
Content promoting excessive or unhealthy dieting/exercise	17%

Source: Ofcom, Online Experiences Tracker 2023. Q8 Which, if any, of the following have you seen or experienced online in the last 4 weeks? Base: UK internet users, aged 18+ (13,205). The OET prompted adult participants with a list of 37 harms, this table shows the top 10.

Men (42%) and younger adult internet users aged between 18-24 (49%), 25-34 (46%) and 35-44 (43%) are more likely than the average internet user to say they have experienced misinformation online. To understand experiences of misinformation in more depth, we asked those who said they had experienced it to identify the type of misinformation they had seen. A quarter of adults said the content they saw related to '*political or electoral misinformation*', followed by misinformation which '*discriminated on the grounds of a protected characteristic*' (16%), and financial misinformation (11%).

Figure 55: Types of misinformation encountered by adults

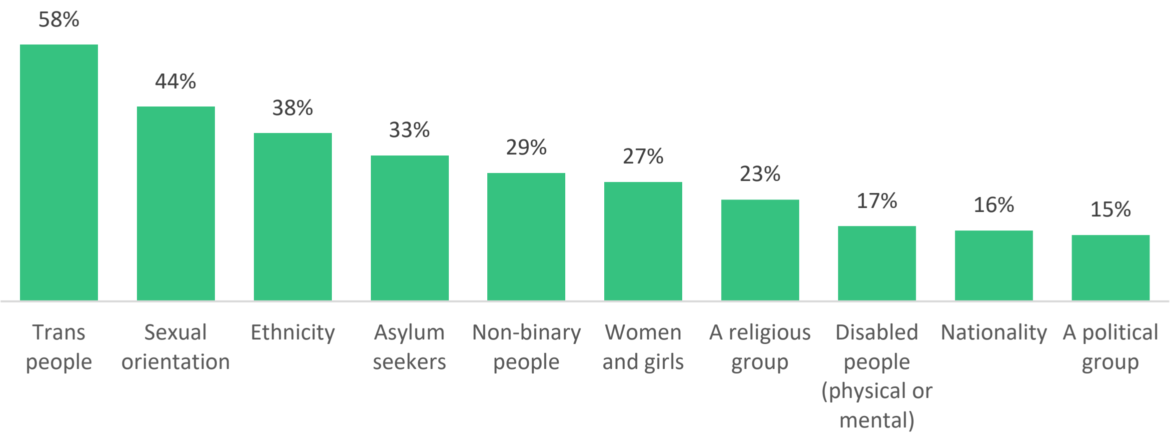


Source: Ofcom, Online Experiences Tracker 2023. Q32a1. Which of the options below best describes the misinformation you saw? Base: UK internet users 18+ (5229).

When considering adults' experience of hate speech, 23% of adults said they had encountered '*hateful, offensive or discriminatory content that targeted a group or person based on specific* *characteristics like race, religion, disability, sexuality or gender identity, e.g., hate speech'* in the past four weeks. Younger adults aged 18-24 (38%), adults with a limiting and impacting condition (28%), those from a minority ethnic group (30%) gay or lesbian (41%) and bisexual adults (46%) were more likely than the average internet user to report that they had encountered this type of content (22%).

Of those who reported encountering '*hateful, offensive or discriminatory content'* most recently, almost half had seen it more than six times in the past four weeks (47%). The participants were then asked what groups of people or characteristics the content was aimed at. Over half said that it targeted trans people (58%), and 44% said it targeted people based on their sexual orientation. In some cases, this content was directed at the participant themselves; 13% said they felt personally targeted by their most recent encounter of '*hateful, offensive or discriminatory content*'.

Figure 56: Top ten groups of people targeted by 'hateful, offensive or discriminatory content'



Source: Ofcom, Online Experiences Tracker 2023. Q13. Which group or characteristic, if any, was the … hate speech you experienced directed towards? This could include … hate speech directed towards you personally. Base: adult internet users who have encountered hateful offensive or discriminatory content most recently (528).

False age profiles put children at higher risk of being exposed to online harms

Ofcom's Children and parents: media use and attitudes report found that 71% of 8-11-year-olds and almost all 12-15-year-olds and 16-17-year-olds have their own profile on at least one of the social media sites listed in our study (95% and 96%, respectively).

Ofcom's user age research suggests that 22% of 8–17-year-olds (and 20% of 8-15s) with a social media profile on at least one of the platforms listed in our study, have a user/profile age of at least 18, meaning they are at greater risk of seeing adult content. The research also estimates that a third (34%) of children aged 8-15, with a social media profile on at least one of the platforms listed, have a user/profile age of at least 16.[179] Our work on risk factors highlights that children with a user/profile age of 16+ or 18+ may be exposed to new features or functionalities on their social media profile, such as direct messaging from strangers or having the ability to see adult content, thereby potentially exposing them to harm online.[180]

[179] Ofcom, User Age, 2023. Please note, the user age Wave 1 data has been updated on 8 May 2024 to reflect changes made to the user age calculations.
[180] Ofcom, Research into risk factors that may lead children to harm online, 2022.

Currently, TikTok is the only service which publishes data (in its transparency report) about the removal of underage accounts. This data indicates that in Q1 2023 approximately 24% (16,947,484) of total accounts removed globally were suspected to be under the age of 13, and similar proportions were also removed in the previous two quarters.[181] According to TikTok's community guidelines, users must be 13 or older to have an account, although there is a separate under-13 TikTok experience for users in the US.[182]

Children encounter potential harm online at similar levels to adults

When prompted, 71% of children aged 13-17 said they had encountered a potential harm online in the past four weeks, with girls more likely to say this than boys (74% vs 68%). '*Generally offensive or bad language*' is the top potential harm encountered by this age group (47%) but as mentioned below, 13-17s are much less likely to be bothered or offended by this content. The second most prevalent harm encountered among this age group is '*misinformation*' (34%) followed by *'content showing dangerous stunts or online challenges'* (30%). The top-three hierarchy of prevalence has shifted since April/May 2022. While '*generally offensive or bad language'* continues to be the most prevalent harm, '*unwelcome friend or follow requests or messages'* has dropped from second most prevalent to fourth, with '*misinformation*' now in second place. '*Scams, fraud or phishing'* has dropped from third place but is still within the top ten potential harms encountered by this age group.[183]

While there is little difference between younger teens (aged 13-15) and older teens (aged 16-17) in terms of encountering any unspecified potential harm online (70% vs 74%), there are differences between the two when looking at individual listed potential harms. Older children are more likely than younger children to say they have encountered *'content encouraging gambling'* (30% vs 21%), *'scams, fraud or phishing'* (30% vs 22%), '*content which advertises alcohol or cigarettes'* (25% vs 19%) and '*paid-for or sponsored content which was not clearly marked'* (20% vs 15%). Conversely, younger children are more likely to encounter '*intentional harassment during gaming'* (13% vs 9%).[184]

Figure 57 Top ten harms experienced by 13-17s, by subgroup

Potential harm	13-17s	Boys	Girls	13-15	16-17
Generally offensive or bad language, e.g. swearing, rudeness	47%	43%	50%	46%	48%
Misinformation i.e. false or misleading stories, claims or assertions e.g. 'fake news'	34%	33%	35%	32%	37%
Content showing dangerous stunts or online challenges	30%	31%	30%	30%	31%

[181] TikTok, TikTok Community Guidelines Enforcement, Q1 2023. TikTok recently released data for Q2 2023 in which the proportion of accounts removed as underage is given as 29%. Due to changes in policy categories for the Q2 data, which may impact comparability with previous periods, we will continue to refer to Q1 2023 data in this chapter.
[182] TikTok, TikTok Community Guidelines, Accounts and Features.
[183] Due to changes to panel provider and methodology we are unable to make direct comparison to specific data points however, in some areas we have included reference to hierarchical similarities or differences with W2 data. At W4 an addition of 'e.g. fake news' was included in the misinformation code, which could affect the change in hierarchy.
[184] Due to the smaller sample size for 13-17s in the OET, this data has been significance tested at 95%.

Potential harm	13-17s	Boys	Girls	13-15	16-17
Unwelcome friend or follow requests, or messages	30%	25%	35%	30%	29%
Content encouraging gambling, e.g. sports betting, or casino-style games	25%	28%	23%	21%	30%
Scams, fraud, or phishing	25%	26%	23%	22%	30%
Trolling, i.e. a person who says something to cause intentional upset or provoke a negative reaction	23%	22%	24%	22%	25%
Content or language which objectifies, demeans or otherwise negatively portrays women	22%	18%	26%	22%	22%
Content which advertises alcohol or cigarettes	22%	21%	23%	19%	25%
Hateful, offensive or discriminatory content that targets a group or person based on specific characteristics	21%	18%	23%	20%	23%

Source: Ofcom, Online Experiences Tracker 2023. Q8 Which, if any, of the following have you seen or experienced online in the last 4 weeks? Base: UK internet users, aged 13-17 (976). The OET prompted child participants with a list of 38 harms, this table shows the top 10.

The expectation of encountering violent, abusive or inappropriate content on a VSP among adults decreases with age

Ofcom's VSP (Video-Sharing Platforms) Tracker found that the expectation of encountering harmful content on VSPs is widespread. Half of VSP users say they expect to come across harmful content on any VSP in the next three months (51%), with certain groups – younger adults (18-44), those from minority ethnic groups and those with a limiting and impacting condition – more likely to expect to encounter harm.[185]

Figure 58: Expectation of encountering harm on a VSP among VSP users, by subgroup

Demographic group		Likely to encounter harm on any VSP in the next 3 months
Gender	Women	50%
	Men	52%
Age	13-17	62%
	18-24	75%

[185] Ofcom, VSP tracker, 2023

Demographic group		Likely to encounter harm on any VSP in the next 3 months
	25-34	68%
	35-44	58%
	45-54	35%
	55+	29%
Ethnicity	White	48%
	Minority ethnic group	70%
Limiting or impacting condition	Yes	59%
	No	46%

Signifies higher than the total at 95% confidence

Signifies lower than the total at 95% confidence

Source: Ofcom VSP Tracker 2023. 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: VSP users (1188).

Generally, the harms which elicit the highest levels of concern among internet users are encountered less often

Even if internet users have not encountered potentially harmful content or behaviour themselves, they may still be worried about its existence online. When asked how concerned they are about individual potential harms existing online,[186] UK internet users aged 18+ are most concerned about '*content depicting the sexual abuse or sexual exploitation of children*' (89% high concern) and '*content encouraging extremism, radicalisation or terrorism*' (82% high concern). Among 13-17s, who were presented with a slightly different list, '*animal cruelty*' (67% high concern) and '*content promoting suicide*' (66% high concern) are the harms where concern is at its highest.[187]

Figure 59: Top five potential harms with high levels of concern among adults and 13-17s.

Top five potential harms adults are most concerned about online (net high concern)		Top five potential harms 13-17s are most concerned about online (net high concern)	
Content depicting the sexual abuse or sexual exploitation of children.	89%	Content depicting animal cruelty	67%
Content encouraging extremism, radicalisation or terrorism	82%	Content promoting suicide	66%

[186] Participants are asked to rank on a scale of 1 to 5, where 1 means 'mildly concerned' and 5 means 'very concerned': 'how concerned you are about (the below) existing online'. A 'net' was then created, combining 4 and 5 on the scale, demonstrating high concern among users.
[187] Due to the nature of the harms listed in the OET, certain harms were only shown to 13-17s and some shown only to those aged 18+ due to their relevance / severity.

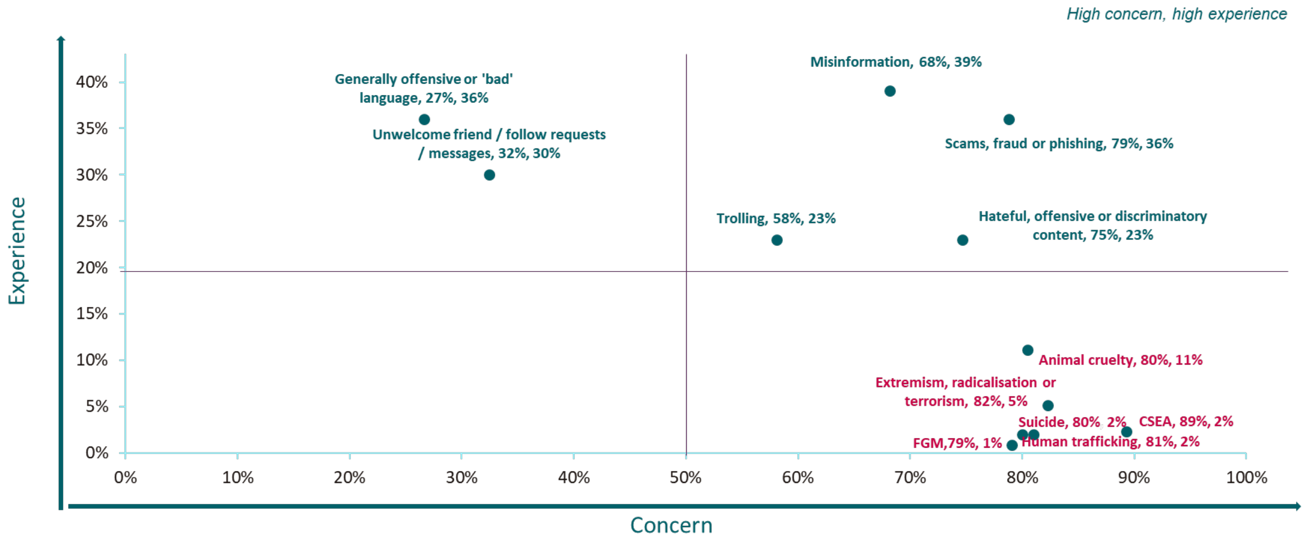
Top five potential harms adults are most concerned about online (net high concern)		**Top five potential harms 13-17s are most concerned about online (net high concern)**	
Content facilitating human trafficking (including sexual and labor exploitation, or recruitment for county lines activity) and illegal immigration	81%	Content promoting self-harm	61%
Content depicting animal cruelty	80%	Hateful, offensive or discriminatory content that targets a group or person based on specific characteristics like race, religion, disability, sexuality or gender identity, e.g. hate speech	60%
Content promoting suicide	80%	Persistent bullying online	60%

Source: Ofcom, Online Experiences Tracker 2023 Q7. Below is a list of things that someone may come across on the internet. Please tell me on a scale of 1 to 5, where 1 means 'mildly concerned' and 5 means 'very concerned', A NET was created combined 4 and 5 to demonstrate high concern. Base: UK internet users 18+ (13205) and 13-17s (976).

Some internet users are not at all concerned about some of the potential harms listed. Almost a third of 13-17 year olds say they are not at all concerned about '*generally offensive or bad language'* (31%). This is also true for adult internet users, with 26% saying they are not at all concerned about this potential harm.

When looking at the top potential harms that adults are most concerned about, compared with the reported exposure of that content or behaviour, in general, the harms with the highest levels of concern are encountered at a low level among adults. '*Scams, fraud or phishing'* is an exception; it is within the top ten harms adults are most concerned about *and* the top ten most-experienced harms among this group.

Figure 60: Adults' concern about potential harms compared with incidence of experience.

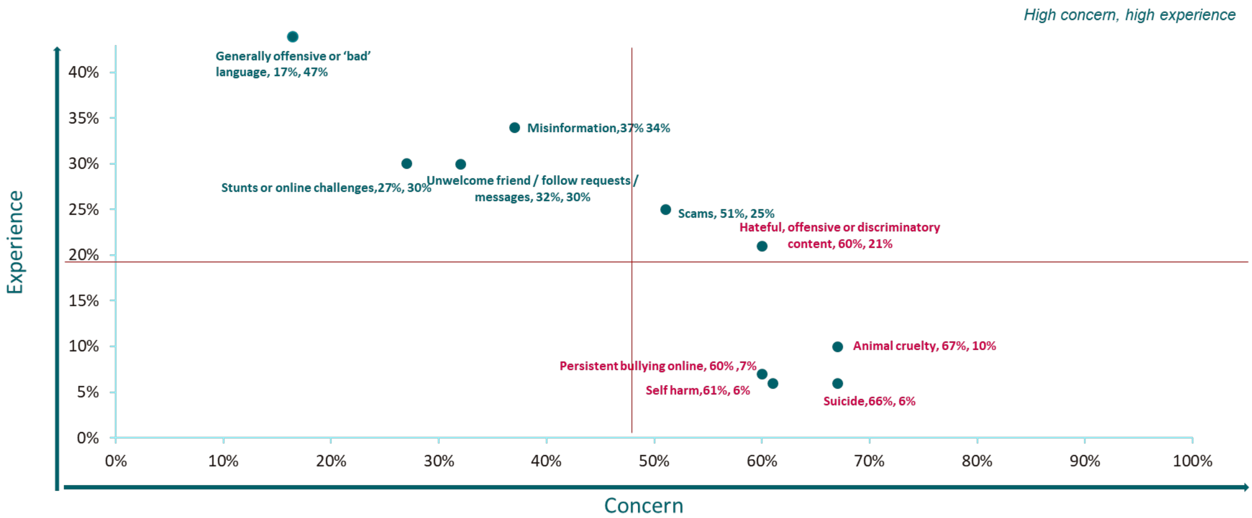


Harms in green: most prevalent. Harms in red: highest concern.

Source: Ofcom, Online Experiences Tracker 2023. Q8 Which, if any, of the following have you seen or experienced online in the last 4 weeks? Base: UK internet users, aged 18+ (13205). Vs Q7. Below is a list of things that someone may come across on the internet. Please tell me on a scale of 1 to 5, where 1 means 'mildly concerned' and 5 means 'very concerned', how concerned you are about the below existing online. Base: UK internet users, aged 18+ (13205).

The story is similar for 13-17-year-olds; the high-concern harms among this age group are encountered at a relatively low level. In this case, '*hateful, offensive or discriminatory content'* is an exception as it sits both within the top 10 harms children are concerned about and top 10 most-experienced harms for this age group.

Figure 61: 13-17s' concern about potential harms compared with incidence of experience



Harms in green: Most prevalent. Harms in red: highest concern

Source: Ofcom, Online Experiences Tracker 2023. Q8 Which, if any, of the following have you seen or experienced online in the last 4 weeks? Base: UK internet users, aged 13-17 (976). Vs Q7. Below is a list of things that someone may come across on the internet. Please tell me on a scale of 1 to 5, where 1 means 'mildly concerned' and 5 means 'very concerned', how concerned you are about the below existing online. Base: UK internet users, aged 13-17 (976).

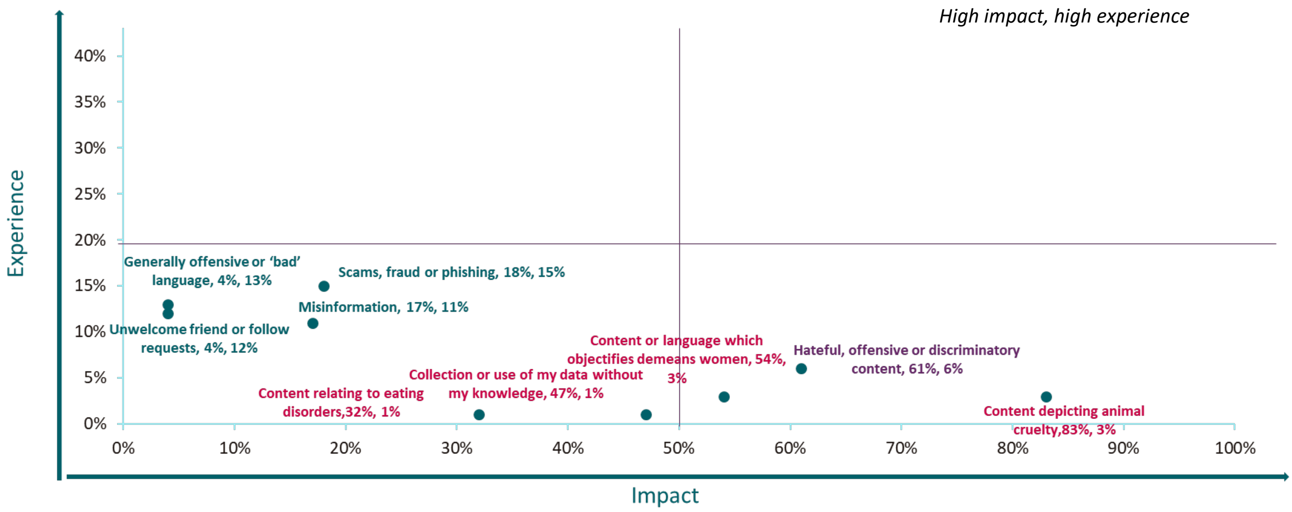
The impact of encountering a potential harm online varies by the type of content encountered.

Having asked which potential harm(s) they may have encountered, Ofcom asked UK internet users to rate how badly they were affected by the potential harm they had experienced most recently, on a scale from 1: '*It didn't bother me at all / It didn't offend me'* to 3: *'It really bothered me / I found it extremely offensive*'. While exposure to any type of potentially harmful content or behaviour can negatively affect the online experience of users aged 13+, our research shows that not all potentially harmful online content or behaviour has the same degree of negative impact.

'*Content depicting animal cruelty'* provokes a high level of negative impact among users aged 13+ who encountered it most recently (83%). Women and girls are more likely than men and boys to say that their most recent encounter with this content '*really bothered or offended them'* (90% vs 70%). However, this content is encountered relatively rarely by UK internet users (3% had encountered it most recently). '*Hateful offensive or discriminatory content*' (61%) and '*content or language which objectifies, demeans or otherwise negatively portrays women'* (54%) also provoke high levels of negative impact among those who encountered it most recently. For both adults and children both these types of content provoke a strong negative impact and are more often encountered, sitting within the top ten potential harms encountered by both groups. Again, women and girls are more likely than men and boys to say that their most recent encounter of '*hateful, offensive or discriminatory content'* (68% vs 50%) and '*content or language which objectifies, demeans or otherwise negatively portrays women'* (60% vs 38%) really bothered or offended them.

For some internet users, certain experiences online do not provoke a negative impact. 66% of those who encountered '*generally offensive or bad language'* and 45% of those who encountered '*unwelcome friend or follow requests'* most recently, said that the experience didn't bother or offend them at all. Both potential harms also sit within the top five listed potential harms encountered by adults and children, suggesting that high exposure to these experiences might contribute to lower levels of impact.

Figure 62: Impact of potential harm compared with incidence among users aged 13+



Harms in green: Most prevalent. Harms in red: highest negative impact. Harm in purple: most encountered/highest negative impact.

Source: Ofcom, Online Experiences Tracker 2023. Q9. You mentioned you experienced or saw the following things online during the last 4 weeks. Which did you see or experience most recently? Base: UK internet users (9705) VS Q14b. We would like you to think again about the last time you saw or experienced [INSERT HARM SELECTED AT Q9]. On a scale of 1 to 3, where 1 means 'It didn't bother me at all/It didn't offend me' and 3 means 'It really bothered me/I found it extremely *offensive', when you last saw or experienced [INSERT HARM SELECTED AT Q9], would you say the content or experience was… Base: UK internet users who've encountered 'generally offensive or bad language' most recently (1251); 'unwelcome friend or follow request' most recently (1148); 'Misinformation' most recently (1056); scams fraud or phishing' most recently (1447); 'hateful offensive or discriminatory content' most recently (552); 'content relating to eating disorders' most recently (112); 'collection or use of my data without my knowledge' (129); 'content or language which objectifies or demeans women' (314); 'content depicting animal cruelty'(304)Base sizes of lower than 50 are not included.*

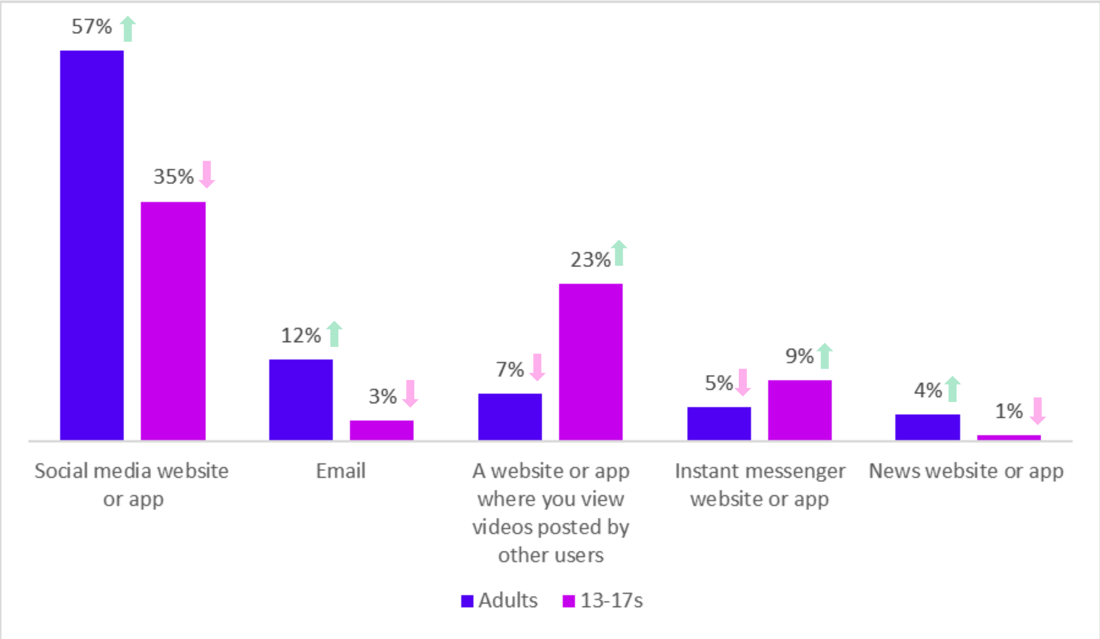
Harms are most commonly encountered on social media.

Overall, social media is the platform type where most harm is encountered (56%).[188] Adults are more likely than children to say they have experienced a potential harm most recently on a social media platform (57% vs 35%); women aged 18+ are more likely than average to say they have encountered potential harm on this service type (62% vs 56%). '*Unwelcome friend or follow requests'* (77%), followed by '*hateful, offensive, or discriminatory content'* (74%) and '*trolling'* (73%) are the top three potential harms encountered by users aged 13+ on a social media platform.

Email is the second most frequent service where potential harm is encountered, and makes up a large proportion of internet users' experience of '*scams, fraud or phishing'* (57%).

The third most frequent platform type where UK internet users aged 13+ say they have encountered harm most recently is a video-sharing platform (8%). 13-17s are more likely than adults to say they encountered harm on this service type (23% vs 7%), with no differences among gender, or older or younger children.

Figure 63: Top five platform types where internet users say they have encountered harm most recently, adults vs 13-17s.



•Signifies higher than the total at 99% confidence
•Signifies lower than the total at 99% confidence

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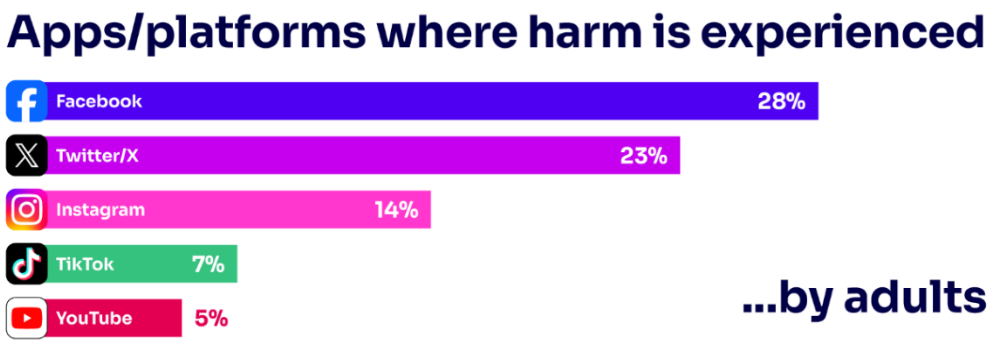
[188] This is based on users' categorisations of platform type, so reference to platform type in this chapter may not align with the categorisation of platform type referenced in the first chapter or within the Online Safety Act.

Source *Ofcom, Online Experiences Tracker 2023. Q21. What type of site or service were you using when you most recently experienced [INSERT HARM SELECTED AT Q9]. Base: UK internet users 18+ (6,414) 13-17s (634).*

Twenty-eight per cent of adult internet users say that Facebook is the platform where they encountered their most recent potential harm. The percentage increases with age; almost half of those aged 75+ had encountered this, compared to 11% of 18-24s. As detailed in the Online Landscape chapter, the use of Facebook increases with age, so the increased exposure to harm on Facebook among older adult internet users may be a function of greater use. Certain groups of adults are also more likely to say they have experienced harm on Facebook, including women and those with an impacting or limiting condition (32% and 30%).

Figure 64: Top five apps/platforms where harm is experienced by adults



Source: Ofcom, Online Experiences Tracker 2023. Q22_28 Which video viewing website/search engine/ social media website / livestreaming website / instant messenger / gaming platform / Q&A website or app were you using when you experienced… Base: UK internet users 18+ (6,082).

Figure 65: UK online adult reach of selected social media services: May 2023.

	Facebook & Messenger	X (formerly Twitter)	Instagram	TikTok	YouTube
Adult reach in May 2023	91%	50%	73%	44%	91%
Adult daily reach in May 2023	62%	20%	35%	14%	43%

Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2023, age:18+, UK. Note: TV set and smart display use not included.

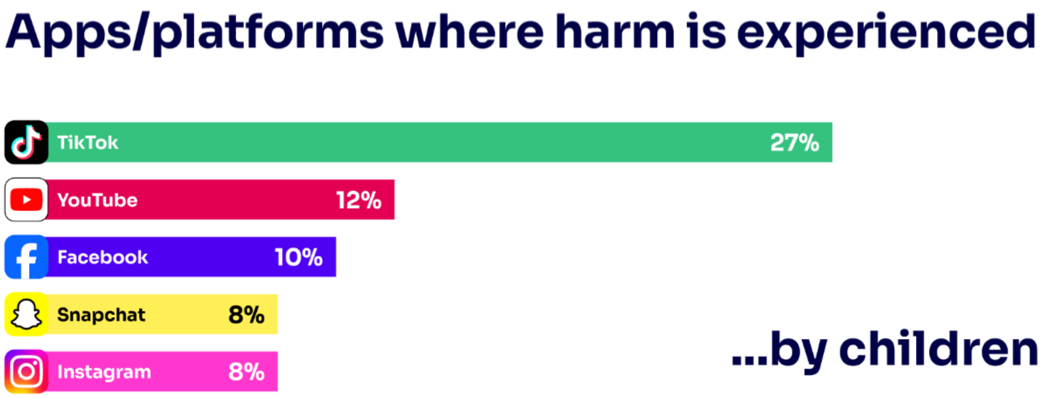
Children encounter both positive and negative experiences on TikTok

TikTok is reported as having the highest prevalence of potential harm encountered online for 13-17s (27%), compared to just 7% for adults. This increased exposure to potential harm among child users could be a function of the level of use of TikTok among children. Among 13-17s, girls are more likely than boys to say they have experienced harm on TikTok (33% vs 20%).

While TikTok is the platform on which children are most likely to say they encountered their most recent harm, a recent poll using our Online Research Panel found that 14% of children aged 8-15 said that in the past four weeks TikTok was the platform that made them happiest (behind only

YouTube at 30%), indicating that a given platform can be the source of both positive and negative experiences.[189]

Figure 66: Top five apps/platforms where harm is experienced by 13-17s



Source: Ofcom, Online Experiences Tracker 2023. Q22 Which video viewing website/search engine/ social media website / livestreaming website / instant messenger / gaming platform / Q&A website or app were you using when you experienced Base:UK internet users 13-17 (473)

Service providers' own data reveals levels of potentially harmful content online.

Some service providers publish details in their transparency reports about the amount of and types of content that are removed for violating the terms or community guidelines of the service. For example, in Q1 2023 TikTok reported that approximately 31% of the violations recorded for the 91 million videos removed globally were breaches of the platform's policy around minors' safety, while 1% were integrity and authenticity violations. In the UK, a total of 3.9 million videos were removed by TikTok in Q1 2023 (4% of the global total – fairly similar to previous quarters); the splits of violations by policy category are not currently published for the UK.[190]

Removals data does not necessarily provide insight into how many users actually experienced the content, but some platforms do report quantitative measures of the amount of content which is viewed by users before being removed. For example, TikTok reports that, in Q1 2023, 73% of the 3.9 million videos in the United Kingdom that were removed had no views – this datapoint has only been reported since Q3 2022, when the rate was reported as 86%. TikTok also reports removal rate by policy category at a *global* level, which demonstrates some significant differences between removal rates by platform policy. For instance, in Q1 2023 94% of removed content relating to suicide, self-harm and disordered eating was reportedly removed with no views. This compares to 75% of removals with no views for hateful behaviour, 73% of removals with no views for integrity and authenticity,[191] 71% of removals with no views for content depicting dangerous acts and challenge and 59% of removals with no views of harassment and bullying violations.[192]

[189] Ofcom, Online Research Panel Poll: Children's wellbeing online, August 2023
[190] TikTok, TikTok Community Guidelines Enforcement, Q1 2023. TikTok states that videos can receive multiple violations, meaning that the total number of violations from which the proportions of each policy are calculated may be higher than the video removals figure.
[191] When broken down by sub-policy, integrity and authenticity refers to policy violations regarding spam, fake engagement and harmful misinformation.
[192] TikTok, TikTok Community Guidelines Enforcement, Q1 2023.

Other services, including Pinterest and YouTube, also publish data which relates to the views accrued by removed videos. A few service providers produce data relating to user *exposure* to content that violates services' policies (regardless of any subsequent enforcements against that content). For instance, YouTube reports on a 'violative view rate' which is aggregated for all harms including spam. In Q1 2023 YouTube estimated that, at most, 0.10% of content views (one in every thousand) were of content which violated their community guidelines.[193] This rate has been roughly the same since Q3 2021. Snapchat similarly reports on a 'violative view rate', which was estimated to be 0.03% (three in every 10 thousand views) during H2 2022.[194]

Meta reports similar metrics for Facebook and Instagram, called 'prevalence', broken down by policy type. In Q1 2023, the prevalence rate for content that violated the policy around adult nudity and sexual activity on Facebook was estimated to be around 0.09%, indicating that of every 10 thousand content views, about nine were of content containing this type of violation.[195]

More than a third of internet users encountered their most recent harm by scrolling through their feed or 'for you' page

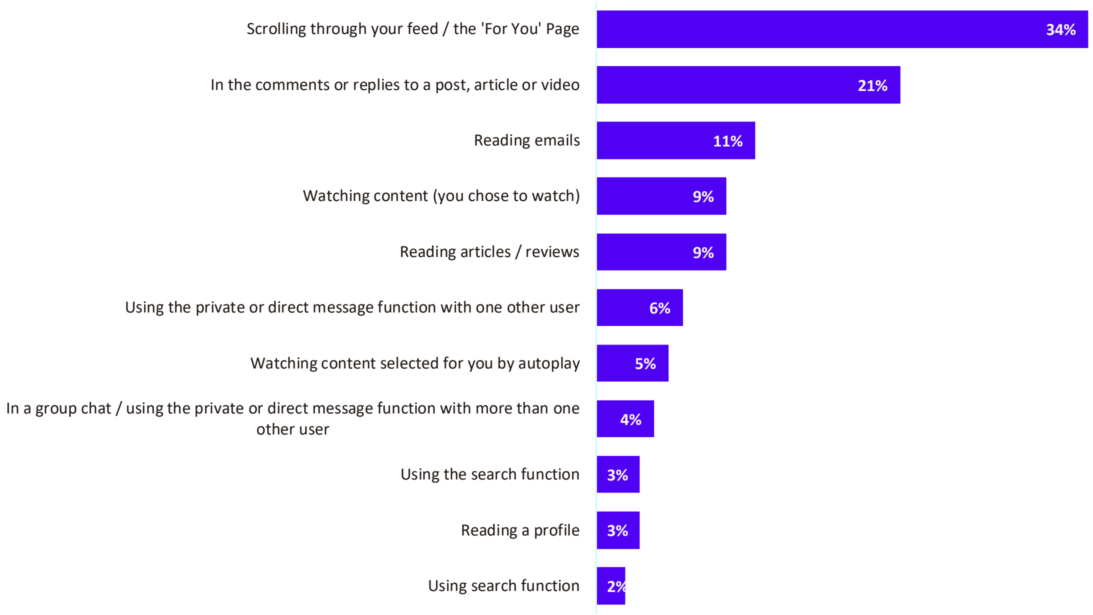
Potential harms online can be encountered in different ways. Exposure to potential online harm is more likely to take place when internet users scroll through their feed or 'for you' page, with 34% of internet users aged 13+ encountering their most recent potential harm this way. Adults are more likely than 13-17s to say they had been exposed to recent harm when using this feature (35% vs 26%). The top two ways in which potential harms are encountered, as shown in the graph below, broadly align with the hierarchy observed in April/May 2022.[196]

Overall, the potential harms most likely to be encountered through this feature include *'content relating to eating disorders'* (58%), '*hateful, offensive or discriminatory content'* (55%) and *'content glamourising unhealthy or abusive lifestyles, e.g. binge drinking, drug taking'* (54%).

At the other end of the scale, internet users are least likely to say they were exposed to a potential harm when watching livestreamed content (2%), using the search function (3%), or reading a profile (3%).

[193] YouTube, YouTube Community Views, Q1 2023. YouTube has recently released data for Q2 2023, in which the violative view rate is very similar. For consistency with other quarterly transparency data included in this chapter from TikTok and Meta, we refer to the previous data release in the main text.
[194] Snapchat, Overview of Content and Account Violations, H2 2022.
[195] Meta, Community Standards Enforcement, Q1 2023. Meta has recently released data for Q2 2023, in which the prevalence rate on Facebook for this policy category is very similar. For consistency with other quarterly transparency data included in this chapter from TikTok and YouTube, we refer to the previous data release in the main text.
[196] Due to changes to panel provider and methodology we are unable to make direct comparison to specific data points however, in some areas we have included reference to hierarchical similarities or differences with W2 data.

Figure 67: Top ten ways in which potential harms were encountered.



Source: Ofcom, Online Experiences Tracker 2023. Q21a. You said you experienced [INSERT HARM SELECTED AT Q9], how did you come across this? Base: UK internet user 13+ (8730).

Awareness of and attitudes towards rules and reporting

VSP Tracker data shows that the majority of users believe they are aware of what they can and can't post on video-sharing platforms

Before looking at UK internet users' actions taken after encountering potentially harmful content or behaviour, it's important to understand their awareness of the 'rules' and the reporting tools on platforms.

The VSP tracker asks users about their experiences and views of safety features on video-sharing platforms (VSP).[197] In the latest wave, it found that 71% of VSP users are aware of what they are and are not allowed to post on any VSP. Instagram and Facebook users report the highest levels of awareness (63%). However, awareness varies for different groups of people, as demonstrated in the tables below. Children and younger adults, those from a minority ethnic group and those with a limiting or impacting condition are also more likely to say they are aware.[198]

[197] In the VSP tracker, video-sharing platforms (VSPs) are a type of online video service which allow users to upload and share videos with the public. A full list of VSPs included in the study can be found in the questionnaire. This list was based on the VSPs that were notified under the VSP regime at the time of fieldwork.
[198] Ofcom, VSP tracker, 2023.

Figure 68: Awareness of what is allowed and not allowed to be posted on VSPs, by subgroup

Demographic group		Awareness of what they are and are not allowed to post on any VSP
Gender	Women and girls	72%
	Men and boys	69%
Age	13-17	81%
	18-24	89%
	25-34	80%
	35-44	80%
	45-54	66%
	55+	45%
Ethnicity	White	68%
	Minority ethnic group	85%
Limiting or impacting condition	Yes	76%
	No	69%

•Signifies higher than the total at 95% confidence
•Signifies lower than the total at 95% confidence

Source: VSP Tracker 2023 Q20. To what extent are you aware of what you're allowed to post and what you're not allowed to post on these sites/apps? Base: VSP users aged 13+ (1189)

Awareness of reporting tools is inconsistent across internet users.

Our VSP tracker explores VSP users' experiences and attitudes towards safety features on VSPs. Less than half of VSP users (45%) say they are aware of the rules and safety measures put in place by VSPs to protect users from violent, abusive or inappropriate videos, and this rises to 88% when a range of safety measures were prompted within the questionnaire. The safety measures that respondents perceive to be in place include reporting buttons (62%), a notice that flags content as inappropriate or harmful before you view it (61%), parental controls (60%) and a tool to hide content that they do not wish to see again (60%). Awareness of parental controls has grown compared with previous January 2023 data (55% vs 60%). Younger adults aged 18-24 (96%) and 25-34 (92%) are more likely to be aware of any measure on any VSP, once prompted with safety measures, while respondents aged 55+ are less likely (78%).[199]

Forty-five per cent of VSP users say they have used a reporting button, and of these 86% said they would use it again, mainly because the button is easy to use (63%) and/or easy to find (50%). For those who are unaware of safety measures and rules on VSPs they have used in the past three months (58%), the main reasons given are that they are not accessible (35%) or not required or

[199] Ofcom, VSP tracker, 2023.

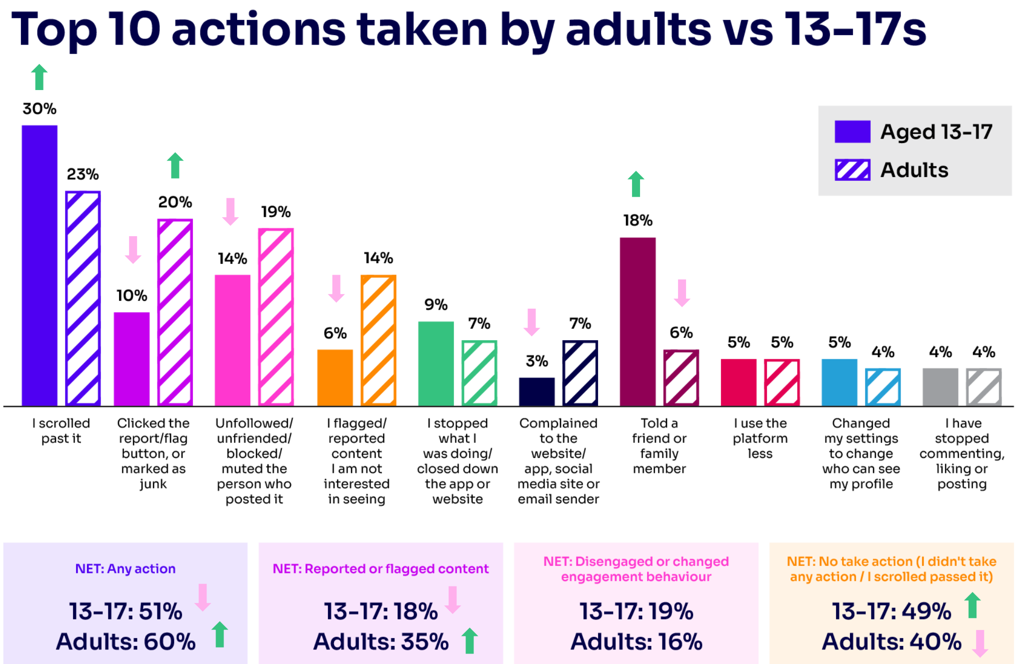
relevant (76%). Fifty-four per cent of parents say they want flagging and reporting mechanisms to be made easier for children to use or access.[200]

Action taken after encountering potentially harmful online content or behaviour

13-17 year olds are less likely than adults to take action as a result of encountering potential harm

Overall, 60% of adults say they took some form of action after encountering their most recent potentially harmful experience online, compared to just over half of 13-17s (51%). Actions taken ranged from disengaging or changing engagement with a platform to more proactive reporting behaviour such as clicking the flag, report or junk button.

Figure 69: Top ten actions taken by adults vs 13-17s



Source: Online Experiences Tracker 2023 Q Q15. When you saw [INSERT HARM SELECTED AT Q9] on that occasion, which of the following actions did you take, if any. Base:UK internet users 13+ (9,048)

As shown in the table below, certain groups are more likely to act compared with the average internet user. Our research also indicates that the frequency of harm encountered correlates with the likelihood of taking any action. UK internet users aged 13+ who have experienced their most recent harm more than six times are less likely than average to take any action (56% vs 59%). And those who say their most recent experience '*really bothered or extremely offended'* them are more likely to act than those who say they are '*slightly bothered or offended'* (77% vs 63%) This is particularly true when compared with those who aren't '*bothered or offended*' at all (40%).

[200] Ofcom, VSP tracker, 2023.

Figure 70: Any action taken, by subgroup

Demographic group		Any action
Gender	Women and girls	62%
	Men and boys	56%
Age	13-17	51%
	18-24	49%
	25-34	56%
	35-44	58%
	45-54	63%
	55+	66%
Ethnicity	White	59%
	Minority ethnic group	60%
Sexuality (18+)	Heterosexual	59%
	Gay or lesbian	64%
	Bisexual	58%
Limiting or impacting condition - adults	Yes	65%
	No	56%
Limiting or impacting condition - 13-17	Yes	56%
	No	48%

•*Signifies higher than the total at 99% confidence*
•*Signifies lower than the total at 99% confidence*

Source: Online Experiences Tracker 2023 Q Q15. When you saw [INSERT HARM SELECTED AT Q9] on that occasion, which of the following actions did you take, if any. Base: UK adult internet users (9,048)

Within the range of actions taken, a small proportion of UK internet users acted by disengaging or changing their engagement behaviour (16%). This includes action such as '*stopped what I was doing/closed down the website*' (7%) and *'I use the platform less'* (5%). Younger internet users aged 13-17 are more likely than adults to tell '*a friend or family member'* about their online experience (18% vs 6%). Ofcom's Children's and Parents' Media Use and Attitudes report found that younger children aged 8-11 are more likely than older children aged 12-15 or 16-17 to tell someone if they saw something worrying or nasty online.

There was a decrease in the number of children aged 8-17 who would *always* tell someone if they saw something worrying or nasty online (53% in 2022 vs 59% in 2021). However, children aged 8-11 were more likely to *sometimes* tell someone in this situation in 2022 than they had been in 2021 (30% vs 25%). Parents who had been informed by their child about an upsetting or scary online experience were most likely to react by talking to their child about what happened (87%), followed by advising/telling their child to block certain people/types of content (56%), or advising/telling their child to stop using certain apps/sites (53%). Parents were less likely to report the content their child had seen to the website/app it appeared on (29%) or set up filters/parental controls (23%) in response.[201]

Adults are twice as likely as 13-17s to respond by clicking the report or flag button or marking potentially harmful experiences as junk (20% vs 10%). And adults with any impacting or limiting condition are more likely than average to respond in this way (22% vs 20%). 'Scams, fraud or phishing' (of which 35% of most recent encounters were reported/flagged/marked as junk), followed by '*hateful, offensive or discriminatory content'* (9% of most recent encounters reported/ flagged/ marked as junk) are the most reported/flagged potential online harms experienced by internet users aged 13+, and both have relatively high prevalence among UK internet users.

There is growing evidence in the field of behavioural insights that relatively small changes to the design of online environments, including safety measures such as reporting, can help shape user behaviour.[202] Ofcom's research into the design and effectiveness of reporting mechanisms used on VSPs suggests that more prominent reporting functions may encourage users to report content they are concerned about. The study used an online randomised control trial, in which three treatments were tested on a mocked-up VSP interface. It introduced three interventions: the first raised the prominence of the reporting function through a 'flag icon'; the second also prompted users to report if they had disliked or commented on the content; and the third used the approach taken in the second treatment but with a simplified reporting process.

Our study found that when unpromoted, in the control group, most participants did not report the potentially harmful content they had seen (98%) even though about one in four chose to dislike the content. Raising the prominence of the reporting option on its own significantly increased the likelihood that potentially harmful content was reported (1% in the control group, 4% with the first treatment). The second intervention had a more significant effect on participants' likelihood of reporting, with 11% reporting potentially harmful content.[203]

Teens are more likely than adults to scroll past their most recent experience of potential harm

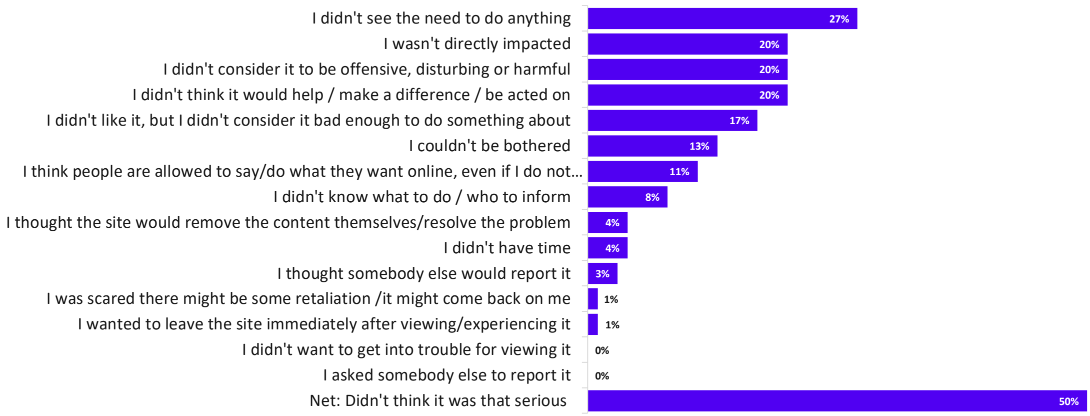
Almost a quarter of UK internet users say they scrolled past their most recent experience of potential harm online, making it the most prevalent response when encountering potentially harmful content or behaviour (24%). This aligns with findings from April/May 2023, which also found that scrolling past potentially harmful content was the most prevalent response among UK internet users.[204] This action is more common among younger internet users, with 30% of 13-17s and 31% of 18-24 year olds saying they scrolled past their most recent encounter. Potentially harmful content most likely to be scrolled past includes '*generally offensive or bad language'* (42%), '*content promoting excessive or unhealthy dieting/ exercise*' (40%), '*content glamorising unhealthy or abusive lifestyles'* (39%), and '*content relating to eating disorders'* (35%).

[201] Ofcom, Children and parents: media use and attitudes report, 2023.
[202] CMA, Online Choice Architecture – How digital design can harm competition and consumers, 2022.
[203] Ofcom, Behavioural insights for online safety: understanding the impact of video sharing platform (VSP) design on user behaviour, 2022
[204] Due to changes to panel provider and methodology we are unable to make direct comparison to specific data points however, in some areas we have included reference to hierarchical similarities or differences with W2 data.

Of those who said that they didn't take any action (17%), half didn't act following their most recent encounter of potential harm because they 'didn't think it was serious enough' (50%). Young adults aged 18-24 are more likely to feel this way compared to the average internet user (62% vs 50%).

Overall, one in five did not take any action because they didn't think it would '*help/make a difference/be acted upon'* (20%). The same proportion didn't report as they were not '*directly impacted'* or they '*didn't consider it to be offensive'*. Young adults aged 18-24 (22%) and those from a minority ethnic group (22%) are more likely than the average internet user to say they '*couldn't be bothered to report'* (13%).

Figure 71: Reasons for not taking action

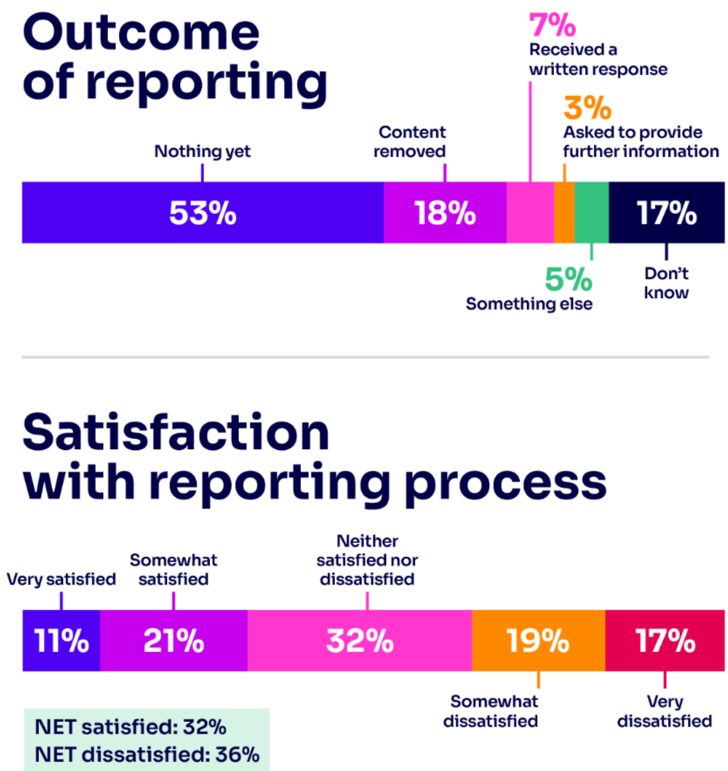


Source: Online Experiences Tracker 2023 Q Q16. Why no action (excludes "I scrolled past it at Q15"): You mentioned you did not take any action. Why was this? Base: UK internet users 13+ (1536).

Internet users have had mixed outcomes from their reporting, and their satisfaction levels with the process reflect this

Over half of those who reported or complained about potentially harmful content or behaviour online said that nothing had yet happened as a result of taking action (53%). Almost a fifth said that the content had been removed (18%), 7% said they had received a written response, and 3% had been asked to provide further information. Satisfaction levels with the reporting or complaints process varied for UK internet users, with 32% feeling satisfied with their experience and 36% feeling dissatisfied.

Figure 72: Outcome of reporting and satisfaction with reporting process



Source: Online Experiences Tracker 2023 Q17_any_named_harm. Results of reporting: You mentioned you reported/complained about the [INSERT HARM SELECTED AT Q9] . What happened as a result? Base:UK internet users 13+ (2061). And Q18_any_named_harm. Satisfaction with reporting process: Overall, how satisfied were you with the reporting/complaints process? Base: UK internet users 13+ (1716).

User attitudes to content moderation and platforms' approach

Just over half of VSP users would like sites/apps to take immediate action when solving a breach of rules or safety measures on VSPs

Many online platforms have terms and conditions and acceptable use policies that set out the types of content that are and are not permitted on their service. Data from Ofcom's latest wave of the VSP Tracker found that when there is a breach of rules on VSPs, the majority of VSP users think that sites/apps should resolve the issues immediately (54%), or within 24 hours (27%). However, as shown in the table below, this varies by age and gender.[205]

Figure 73: Views on sites/apps solving a breach of safety measures on VSPs, by subgroup.

Demographic groups		Immediate resolve of the issue	Resolve of issue within 24 hours
Age	13-17s	64%	21%
	18+	53%	27%
	18-24	35%	34%

[205] Ofcom, VSP tracker, 2023.

Demographic groups		Immediate resolve of the issue	Resolve of issue within 24 hours
	25-34	41%	33%
	35-44	46%	25%
	45-54	57%	29%
	55+	71%	20%
Gender	Women and girls	61%	21%
	Men and boys	47%	31%

•Signifies higher than the total at 95% confidence
•Signifies lower than the total at 95% confidence

Source: VSP Tracker 2023 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: VSP users age 13+ (1242).

As noted earlier in the chapter, some platforms publish transparency reports, which frequently report data relating to detection leading to removals. In Q1 2023 YouTube reported that of the total number of videos removed, 94% (6.1 million) were detected by automated flagging and less than 6% (360k) were identified from user reports.[206] Few platforms indicate publicly how quickly they acted on violative content. Snapchat data showed that in H2 2022 the average (median) turn-round time for the removal of content and accounts for sexual content, after a user report, was six minutes, whereas the time taken to remove content and accounts for hate speech averaged 30 minutes.[207] These times are both higher than in previous periods (in H2 2021 the equivalent turn-round times were less than a minute and 12 minutes respectively), which Snap states was due to a larger number of content and account reports. Globally, TikTok removed 96% of videos containing suicide and self-harm content within 24 hours of them being uploaded, compared to 80% for harassment and bullying; the UK figure aggregated across all policies was 87%.[208]

User attitudes and approaches to staying safe online

Ofcom's research found that 78% of adult internet users feel that people online must be protected from inappropriate or offensive content.[209]

When asked to choose between two statements, 40% of adult internet users felt that there should be more online safety measures in place, while 23% felt that there are already enough. Again, there are differences between demographic groups. Women (49%), adults aged 55+ (46%) and adults who told us they had an impacting or limiting condition (42%) are more likely than the average to opt for more safety measures.

[206] YouTube, YouTube Community Standards Enforcement, Q1 2023.
[207] Snapchat, Overview of Content and Account Violations, H2 2022.
[208] TikTok, Community Guidelines Enforcement Report | TikTok, Q1 2023.
[209] Ofcom Adults' Media Literacy Tracker 2022: Core survey.

Figure 74: Views on safety measures, by subgroup. 'There are enough online safety measures in place vs there should be more online safety measures in place of statements.

Demographic groups		'Enough safety measures in place'	Neutral	'More safety measures needed'
Gender	Women	15%	36%	49%
	Men	33%	37%	31%
Age	18-24	24%	40%	36%
	25-34	22%	39%	39%
	35-44	24%	39%	37%
	45-54	27%	35%	37%
	55+	21%	33%	46%
Ethnicity	White	24%	36%	40%
	Minority ethnic group	20%	36%	44%
Sexuality	Heterosexual	23%	36%	41%
	Gay or lesbian	28%	36%	36%
	Bisexual	25%	40%	35%
Limiting or impacting condition	Limiting or impacting condition	23%	36%	42%
	No limiting or impacting condition	24%	36%	40%

•Signifies higher than the total at 99% confidence

•Signifies lower than the total at 99% confidence

Source: Ofcom, Online Experiences Tracker 2023. Q1. 'There are enough online safety measures in place vs there should be more online safety measures in place of statements, please drag the slider to indicate where your own view lies and click to confirm your choice before moving to the next pair of statements. Base: UK internet users, aged 18+ (13,205).

There are mixed views among adult internet users regarding who should be responsible for controlling what is posted online. When asked to choose between 'the website or app' or 'the individual', 37% feel that the onus should be on the website or app to control what is posted on a site, while just under one in five feel the onus should be on the individual (19%). A large proportion are undecided, unsure or possibly feel that the onus should fall on both the individual and the platform (44%).

Figure 75: Views on responsibility for controlling posted content, by subgroup. 'It is the responsibility of the website or app to control what is posted on their site vs. It is the responsibility of the individual to ensure what they are posting is appropriate for other users.'

Demographic groups		Onus on platform	Neutral	Onus on the individual
Gender	Women	36%	47%	17%
	Men	37%	40%	22%
Age	18-24	38%	43%	19%
	25-34	38%	45%	16%
	35-44	39%	46%	16%
	45-54	36%	45%	19%
	55+	36%	41%	23%
Ethnicity	White	37%	44%	19%
	Minority ethnic group	33%	43%	24%
Sexuality	Heterosexual	36%	44%	20%
	Gay or lesbian	40%	42%	18%
	Bisexual	42%	45%	13%
Limiting or impacting condition	Limiting or impacting condition	37%	43%	20%
	No limiting or impacting condition	37%	44%	19%

Signifies higher than the total at 99% confidence

Signifies lower than the total at 99% confidence

Source: Ofcom, Online Experiences Tracker 2023. Q1. 'It is the responsibility of the website or app to control what is posted on their site vs. It is the responsibility of the individual to ensure what they are posting is appropriate for other users', please drag the slider to indicate where your own view lies and click to confirm your choice before moving to the next pair of statements. Base: UK internet users, aged 18+ (13,205).

Children and parents have adopted a variety of strategies to help children stay safe online, with many parents adopting a form of technical control

More than nine in ten children aged 8-17 have spoken to someone about how to use the internet safely (91%) and 88% have done so with a family member, while 76% have done so with a teacher. However, this year there was a decrease in the proportion of children aged 8-11 who had spoken to someone about how to use the internet safely, from 94% in 2021 to 91% in 2022.[210] Ofcom's qualitative research into understanding online communications among children highlighted the usefulness of school e-safety sessions in providing helpful strategies about staying safe online.[211]

[210] Ofcom, Children and parents: media use and attitudes report, 2023.
[211] Ofcom, Understanding online communications among children, 2023.

Children and their parents use a variety of strategies to help ensure a safe experience online. Ofcom research found that seven in ten parents of children aged 3-17 had a form of technical control in place to manage their child's access to content online; the most-used technical controls were those that are prebuilt into devices such as Windows, Apple or Xbox (34%). There was also an increase in the number of parents with children aged 8-11 who were aware of this type of technical control, rising from 37% in 2021 to 48% in 2022. Parents of 5-7-year-olds were more likely in 2022 than in 2021 to use parental control software, settings or apps that can be installed on their child's phone or tablet (33% compared to 22%). A quarter of parents of children aged 12-15 use parental control software such as Net Nanny or McAfee Family Protection, up from 21% in 2021.[212]

Some children take measures themselves to help them stay safe online. Ofcom's qualitative research has found that a number of strategies are used, including setting gaming and connection accounts to private, so that children cannot be added to groups or receive friend requests from people they do not know; not accepting friend requests or adding people they do not know; verifying people's identity across platforms by finding them on other platforms; and maintaining anonymity online by using anonymous profile pictures and usernames, and not sharing personal information about themselves.[213]

Many children also try to take an informed decision when deciding if they should accept friend requests from someone they haven't messaged or spoken to before. Knowing the person in real life (46%) or having mutual close friends (41%) are the most common considerations used to decide.[214]

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[212] Ofcom, Children and parents: media use and attitudes report, 2023.
[213] Ofcom, Understanding online communications among children, 2023. Please note that other research suggests that some children are less risk-averse online than those included in this study, so this study is valuable in highlighting the behaviours and strategies some children deploy, seemingly relatively effectively.
[214] Ofcom, Understanding online communications among children, 2023.

Methodology

Ofcom research sources

Ofcom Online Experiences Tracker 2023

The Online Experiences Tracker is a quantitative tracking survey that examines people's attitudes to, and experiences of using online services and platforms in the UK. Ofcom carries out this research twice a year using the YouGov online panel of over 2.7 million people who live in the UK.

Wave 4 of the Online Experiences Tracker was conducted among a nationally representative sample of 14,181 UK internet users aged between 13 and 84. Fieldwork was conducted over a ten-day period between 7 and 17 July 2023. The data has been weighted to be representative of the UK internet user population on age within gender, and overall, to regional and SEG profiles.

All respondents who took part in the research were drawn from the YouGov panel. Children aged 13-17 were recruited through their parents or guardians. The survey was passed to the children after obtaining parents' or guardians' consent. Children then gave their own consent and had the opportunity to decline to participate in the research if they wanted.

For more information, please see the Technical Report.

VSP tracker 2023

The VSP Tracker survey is conducted twice a year and serves to understand and track VSP users' awareness, perceptions and claimed experiences of the safety measures and tools available on VSPs, within the broader context of their use of VSPs. A total of 1,242 online interviews among children and adults aged 13+ were conducted by YouGov in Wave 4. Wave 4 fieldwork took place in June 2023.

For more information, please see the Technical Report.

Ofcom Technology Tracker 2023

The Technology Tracker is an annual survey conducted among adults aged 16+, which collects information about people's ownership and use of technologies, including TV, radio, mobile phones, the internet and smart technology. In 2023, the fieldwork was conducted by BMG Research with 3,997 adults between January and April, and was a mix of 80% face-to-face and 20% online surveys. It is worth noting that comparisons with 2021 data are not possible for the Tech Tracker, as the methodology in 2021 had to change to push-to-web and push-to-post due to the Covid-19 pandemic.

Ofcom Adults' Media Literacy Tracker 2022

The Adults' Media Literacy Tracker is an annual survey providing evidence on media use, attitudes and understanding among UK adults aged 16 and over.

This year, the Tracker comprised three surveys:

- Core survey: One wave a year, conducted face-to-face in-home/on the doorstep with additional online interviews conducted through a research panel, with a total sample of 3,651 adults aged 16+ (2,130 face-to-face and 1,521 online). The fieldwork was conducted in

September-November 2022. This survey explored the topics of breadth of internet use, device use and attitudes, and gaming.
- Online Behaviours and Attitudes: Two waves a year, delivered via online panel, with a total sample of 6,100 adults aged 16+ (3,059 in wave 1 and 3,041 in wave 2). The fieldwork for wave 1 was conducted in April-May 2022, and for wave 2 in October-November 2022. This survey explored the topics of social media, online attitudes and wellbeing.
- Online Knowledge and Understanding: One wave a year, delivered via online panel, with a sample of 3,041 adults aged 16+. The fieldwork was conducted in October-November 2022. This survey explored the topics of critical understanding, personal data, trust and online advertising.

Ofcom Children's and Parents' Media Literacy Tracker 2022

The Children's and Parents' Media Literacy Tracker provides evidence on media access, use, attitudes and understanding among children and young people aged 3-17. The survey also asks parents' views about their children's media use, and how parents of children and young people aged 3-17 monitor and manage their children's use.

This year, the Tracker comprised three surveys:

- Online behaviours and attitudes: Two waves a year, delivered via an online panel, with a total sample of 6,795 parents of children aged 8-17 and children aged 3-17 (3,378 in wave one and 3,417 in wave two).This survey was conducted across two waves to capture children's use of rapidly changing media, such as social media, live streaming and video-sharing platforms. The fieldwork for the first wave was conducted in May 2022 and the second wave in November 2022.
- Online knowledge and understanding: One wave a year, delivered via an online panel, with a sample of 2,087 children aged 8-17. The fieldwork was conducted in October-November 2022.
- Parents only: One wave a year, delivered via a mix of online panels and post-to-web surveys, with a sample of 2,526 parents of children aged 3-17. The mixed methodology enabled us to reach a broader sample of respondents. The fieldwork was conducted in October-November 2022.

Further details on the methodology of the Children's and Parents' Media Literacy Tracker 2022 can be found in the 2022 Technical Report.

Ofcom YouGov polls - Online Research Panel

Ofcom works with YouGov Plc UK on the Online Research Panel project, which allows Ofcom to conduct online interviews administered to members of the YouGov UK panel of 2.5 million+ individuals who have agreed to take part in surveys. Emails are sent to panellists selected at random from the base sample. The email invites them to take part in a survey and provides a generic survey link. Once a panel member clicks on the link, they are sent to the survey that they are most required for, according to the sample definition and quotas. Invitations to surveys do not expire and respondents can be directed to any available survey. The responding sample is weighted to the profile of the sample definition to provide a representative reporting sample.

These are the sample definitions for each poll:

Generative artificial intelligence – Total sample was 2,116 participants aged 16+, weighted and representative of UK internet users aged 16+. Fieldwork was undertaken between 9 and 12 June 2023.

Microblogging – Total sample was 10,005 participants aged 16+, weighted and representative of UK internet users aged 16+. Fieldwork was undertaken between 6 and 11 September 2023.

Children's wellbeing online – Total sample was 799 participants aged 8-15, weighted and representative of children internet users aged 8-15 in Great Britain. Fieldwork was undertaken between 25 and 31 August 2023.

Adults' wellbeing online – Total sample was 10,005 participants aged 16+, weighted and representative of UK internet users aged 16+. Fieldwork was undertaken between 6 and 11 September 2023.

Understanding online communications among children

In 2022, Ofcom conducted some online quantitative research on understanding online communications among children, which helped explore who children communicate with online, how they expand their online networks, and whether they have had any potentially uncomfortable interactions online. This was conducted by BMG, and fieldwork took place in December 2022 with 2,031 children aged 11-18. Following this quantitative research, Ofcom commissioned some additional qualitative research with BMG which explored children's communications on games and gaming sites, dating apps and sites/apps which facilitate making new connections. These online interviews took place in February-March 2023 with a sample of 22 children aged 11-18.

Ofcom Children's Online User Ages 2023

To understand the extent to which children are bypassing age assurance measures, Ofcom commissioned YouGov to conduct quantitative research to estimate the proportion of children who have online profiles with 'user ages' that make them appear to be older than they actually are. Fieldwork took place in from August to September 2023 and the questionnaire was completed by 1,806 children aged 8-17.

To be eligible for the survey children were required to use and have their own profile on at least one of the following ten platforms: YouTube (not including YouTube Kids), Snapchat, TikTok, Instagram, Facebook, Discord, Pinterest, Twitch, X/Twitter, Vimeo (or any other platforms they specified in the survey). Boosts were applied to ensure a minimum base size of 50 per platform per age group, sufficient for robust analysis. Data was weighted to be representative of the UK based on age, gender and region, and significance testing was applied at 95% confidence intervals.

Ofcom Communications Affordability Tracker

The Communications Affordability Tracker aims to provide Ofcom with continued understanding of consumer affordability issues in the UK communications markets (covering mobile, landline, fixed broadband, pay TV and on-demand TV services). The tracker has been running since June 2020 with fieldwork being conducted on a quarterly basis via a telephone omnibus. The data included in this report is based on fieldwork conducted in October 2023 among 1,115 UK adults aged 18+, who identify either as the sole or joint decision-maker for communications services in their household and/or those who personally use a mobile phone.

Behavioural insights - reporting mechanisms on VSPs

In 2022, Ofcom worked with Kantar Public to run a series of online randomised control trials with around 2,400 adults in each trial. Both trials took place on a mocked-up video-sharing platform which mirrored real platforms in look and functionality. All participants were shown six videos, a mix of neutral and potentially harmful, in a random order while we measured their behaviour on the platform. In order to test different interventions, participants were randomly allocated to different treatment groups, in which specific changes were made. By randomising the participants and closely controlling the differences between groups, we were able to draw causal inference from the interventions. Following the main section of the trial where participants were able to browse unprompted, they were also asked a series of follow-up questions in order to gain insights into their attitudes and perceptions.

Risk Factors That May Lead Children to Harm Online

In 2022, Ofcom commissioned Revealing Reality to explore how different risk factors combine to increase the likelihood of harm to children online. The specific project objectives were to go beyond a descriptive account of what children are experiencing online and to explore the factors that may lead them to harm and why, with a focus on social media, video-sharing platforms (VSPs), gaming, and search platforms.

Sample: Forty-two children aged between 7 and 17 were recruited to take part in this project, across all four UK nations, with a broad spread by gender, socio-economic group, family structure, ethnicity, special educational need, device and online use. The sample also included seven looked-after children, both those living in foster care as well as those living in residential care. Nine children in the sample had special educational needs or disabilities (SEND).

Methodology: Experiences of online harm are highly complex and can only be understood by taking a range of factors into account, beyond just what children see and say they do online. To capture this appropriately, an ethnographic approach was used for this research - meaning participants' behaviours were observed in their homes and via social media tracking. Screenshots and media diaries were also provided by participants to further understand their online lives, as well as both face-to-face and online interviews being conducted to hear from the children themselves. Further details on the project can be found on the website.

Ofcom Ipsos Children's Passive Measurement Study 2023

Ofcom commissioned Ipsos to carry out a study that passively measured the internet use of 162 children aged 8-12 across smartphones, tablets and computers. The purpose of the study was to test whether passive methodology can in the future deliver robust metrics of children's online use. The study therefore was conducted among a small sample of 162 8–12-year-olds and so only reflects the online use of the children in the study and may not be representative of all UK children aged 8-12.

Devices were measured where the child's parent/guardian informed us during recruitment that the child used the device at least once a week. A passive monitoring app /VPN tracker was installed on the devices used by the child, which collected the data. The monitoring app could only be downloaded to iOS or Android devices; Amazon Fire tablets for children were not compatible with the app. 227 devices were measured: 127 smartphones, 79 tablets and 21 laptop/desktop.

We are aware that children share devices with other household members, as such as part of the recruitment process, parent/guardians of the children taking part informed us which devices that were to be tracked were shared with others. Family user mode was available on the tracking app for Android computers only which meant the device user could indicate who they were before their online activity was undertaken on the device limiting irrelevant data collection on these devices.

A data cleaning process was implemented to ensure the data reasonably reflected the child's online behaviour and removed behaviour which was more likely to come from an adult. We initially began with 169 child participants but following the data cleaning process 7 participants were removed as the majority of their data reflected adult use leaving us with 162 participants. In some instances where participants had more than one device measured, devices which predominantly reflected adult use were removed, overall (including the participants that were completely removed) 14 devices were removed.

One of the limitations with shared devices is that sometimes children share devices with siblings, that could have a similar behaviour or similar interests to them. For cases like this, we were unable to identify where the data came from the child participating on the study or their siblings, this is likely to remain an ongoing challenge for any future children's passive research.

The pilot study undertook a 2-phase approach with fieldwork conducted during the two phases. The first phase was a soft launch among seventeen children whose online use was measured over three-week period in January-February 2023. This small sample of children was used to ensure that the methodology of the research was appropriate. After confirming that the data collection from the first phase was successful, we continued the research with a larger sample. The second phase measured 145 children for four weeks during April-July 2023. Exact dates varied by participant, but all fieldwork fell within the dates 12 January - 26 February (phase 1) and 11 April - 18 July (phase 2). The results from both phases were combined to provide the unweighted data presented in this report, the data should therefore not be considered as robust.

Children's Online Passive Measurement – the future

We concluded from this pilot study that children's online use can be passively measured. Our intention going forward is to develop Children's Online Passive Measurement in the future, covering an increase in sample size, considering waves for tracking and adjusting the sample and weighting to be nationally representative.

Third-party research sources

Ipsos - Ipsos iris

Launched in early 2021, Ipsos iris is the UKOM-endorsed currency for the measurement of audiences of online content of UK adults aged 15+ who use the internet at least once a month.

Ipsos iris uses a hybrid methodology with several data sources including:

- A passive single-source panel of over 10,000 adults who use the internet. Panellists install passive tracking software onto personally used digital devices (smartphones, computers, and tablets) which access the internet, with data collected continuously. The panel is recruited to be representative of the internet population demographically, geographically and by device type use.
- Census measurement of publisher websites and apps to collect visit measures for time spent and page views at a total level.
- A high-quality Establishment Survey, to produce universe targets. The Ipsos iris panel is then weighted to the internet population of UK adults aged 15+ and demographic subgroups.
- External first-party data from accredited and approved sources with additional website or app level targets.

Reporting on daily and monthly data, all sources are fused together to create a synthetic dataset with more than one million records to represent the UK online infrastructure of websites and apps. These can be analysed and reported at many demographic and geographic levels. As this is a synthetic dataset, it is not possible to provide confidence intervals/ranges for extrapolated population estimates. However, all extrapolated population figures provided are estimates that will have some margin of error.

More detail on the Ipsos iris methodology can be found at https://iris.ipsos.com/what-we-offer/.

For the reports used here, we have mainly used Ipsos iris monthly data from May 2023. The passive panel for this month covered a continuously measured sample of 10,542 adults and 90 15–17-year-olds. The panel size by age and nation is below. Note that as this is a continuous panel, the reporting profile in other months will be similar.

Demographic	May 2022 Ipsos iris panel size	May 2023 Ipsos iris panel size	May 2023 UK proportions
UK age 15-17	93	90	0.8%
UK age 18+	10,871	10,542	99.2%
England 18+	8,946	8,717	82.0%
Scotland 18+	1,040	983	9.2%
Wales 18+	623	561	5.3%
Northern Ireland 18+	262	281	2.6%

Ampere Analysis - games

Ampere Analysis is a research and data analysis company which focuses on media and communications. This year we have included data from three of Ampere's Games products:

- Ampere Games – Consumer, Q2, UK data. Two surveys are run within Q2:
  One is a survey numbering 2,000 respondents aged 16-64 which is nationally representative of the UK online population. The second is much smaller survey of UK 13-15-year-olds (120) which is not nationally representative. Where age groups are not defined, these two sets of responses are combined together.
- Ampere Games – Analytics, August 2023 UK data:
  Analytics tracks title activity across the Xbox and PlayStation console platforms, title inclusion within multi-game subscription catalogues, and provides Ampere's proprietary Popularity metric for leading games.
- Ampere Games – Markets:
  Markets tracks total games market performance and forecasts across device categories, monetisation models, and distribution types.

Platform transparency data

Several online platforms voluntarily publish data about the enforcement of their Terms of Service and/or community guidelines, and the requests they receive from governments or law enforcement agencies. The information is publicly available and is published on the platforms' own websites (usually annually, biannually or quarterly). Examples of information included in transparency reports are:

- the number of content take-downs;
- the use of automated detection and moderation tools;
- the proportions of content views that were of violative content;
- the amounts of content reported by users, governments or other flaggers;
- the number of appeals received from users;
- the number of legal requests for user data; and
- commentary about changes to policies or trends in the data.

In some cases data is split by harm category, as defined by the platform. Ofcom conducts its own monitoring and analysis of this data.

CHILDWISE Summer Omnibus 2023

The CHILDWISE Summer Omnibus is based on fieldwork conducted from June to July 2023, from 1,504 online interviews with boys and girls aged 7-17, plus 19 tweens and teens who identify outside the gender binary. The final data was weighted to restore complete balance by age and gender.

References to other third-party sources

Ofcom references publicly-available information and third-party data sources throughout the report. These include press releases, blogs, earnings reports, transparency reports and other publicly-available corporate information. Other third-party providers cited in Online Nation include:

- Amazon
- Competition & Markets Authority
- Ekoru.org
- Forbes
- IPA Touchpoints
- Meta
- Microsoft
- Midjourney
- OceanHero
- Office for National Statistics
- OpenAI
- Pornhub
- QuiverQuantitative
- Reuters
- SimilarWeb
- Snapchat
- TikTok
- Techcrunch
- Twexit
- UK Parliament
- YouTube