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Children and parents: media use and attitudes report

2020/21

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Overview

This report looks at media use, attitudes and understanding among children and young people aged 5-15, as well as media access and use by young children aged 3-4.

It also includes findings on parents' views about their children's media use, and how they monitor and manage it. It is intended to provide a comprehensive picture of children's media experiences in 2020/21 as a reference for industry, policymakers, academics and the general public.

The Communications Act 2003 places a responsibility on Ofcom to promote, and to carry out research into, media literacy. This report forms part of our wider Making Sense of Media programme.

What we have found

Online access and digital exclusion

- In 2020**, nearly all children aged 5-15 went online.** Laptops, tablets and mobiles were the most used devices for going online, used by seven in ten of these children.
- Ofcom's Technology Tracker 2021[1] research showed that **two per cent of school-age children relied on internet access via a smartphone only,** and **one in five children** who had been home schooling **did not have access to an appropriate device[2] for their online home-learning needs** all of the time.

Content consumption and online activities

- **Children were twice as likely to watch TV programmes on video-on-demand (VoD) than live TV**. Almost all children (96%) watched any type of VoD compared to just over half (56%) watching live TV.
- **Children in Scotland, Wales and Northern Ireland were less likely than children in England to feel there were enough programmes that showed children from the same part of the country as them:** 33% in Scotland, 34% in Wales and 25% in Northern Ireland, compared to 45% in England.

[1] This research was conducted via a CATI methodology on the Technology Tracker survey, therefore is separate from that of the media literacy findings. School-age children in this research was based on 4-18 year-olds.

[2] Interpretation of what was an 'appropriate device' was down to the parents answering the relevant question (see Digital exclusion section for further details).

- **Children's use of video-sharing platforms (VSPs) was nearly universal,** with a majority using VSPs more during the coronavirus (Covid-19) pandemic than before.
- **Seven in ten 5-15s played games online in 2020.** This was more prevalent among boys than girls (78% vs. 64%). Boys were also more likely, than girls, to use gaming to connect with their friends.
- **Just over half of 5-15s used social media sites or apps,** rising to 87% of 12-15s. The range of sites and apps used remains diverse; around a third of 5-15s used Instagram, Snapchat and Facebook.

Online knowledge and understanding

- **Just under half of children aged 8-15 who used search engines could correctly identify adverts on Google searches,** and about half realised that some sites within a search engine's results could be trusted and some couldn't.
- **Two-thirds of 12-15s recognised that vloggers and influencers might be sponsored** to say good things about products or brands. Children in our Children's Media Lives study found this helpful as it showed them products and services that were in line with their interests.

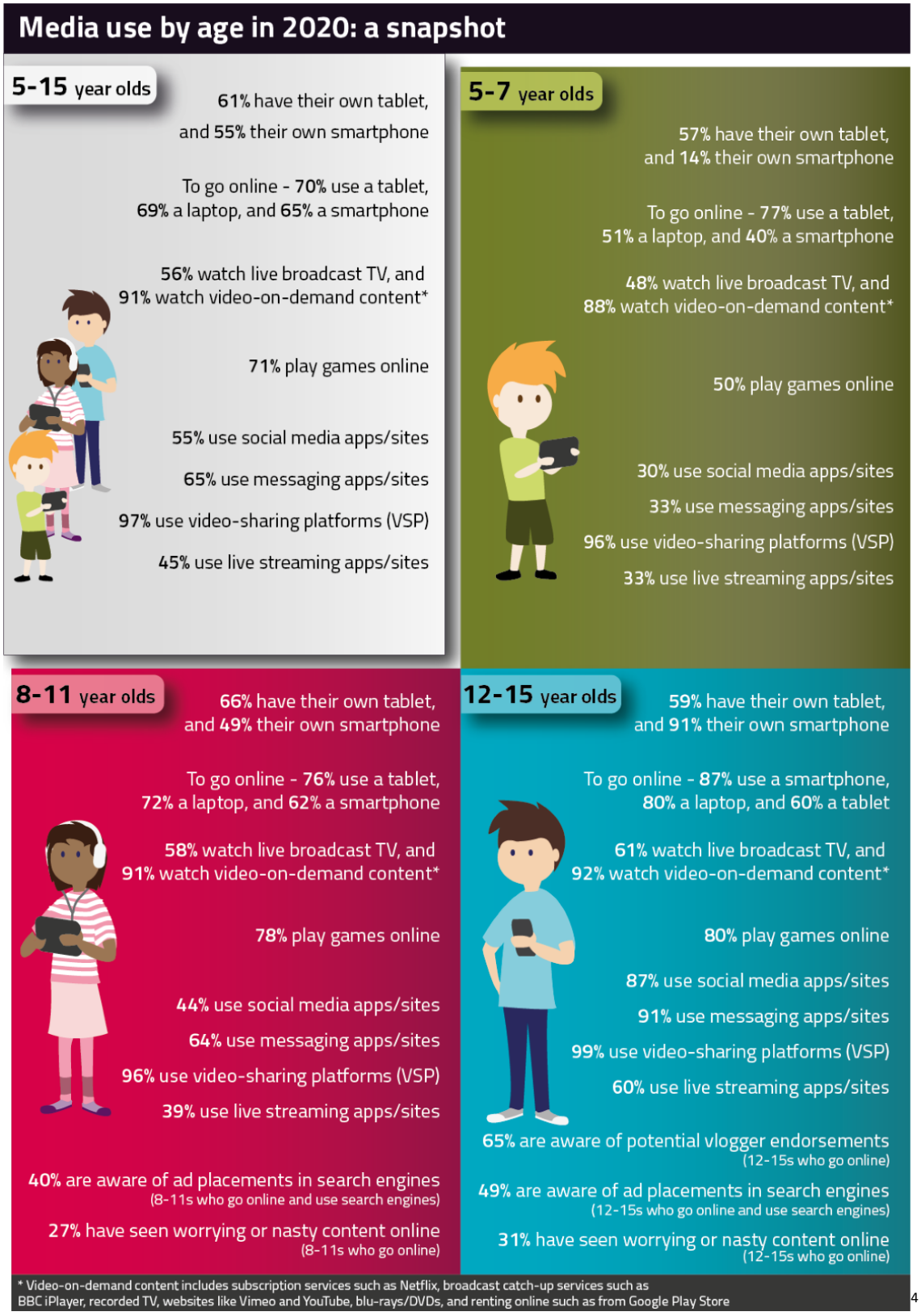
Staying safe online

- **Just over half of 12-15s have had some form of negative online experience[3].** The most common type of these was being contacted by someone they did not know who wanted to be their friend, which happened to almost a third of children in this age group.
- **Awareness of reporting functions was high** (70% of children aged 12-15), but only 14% of 12-15s have ever reported content.

Parental attitudes and mediation strategies

- **Parents found it harder to control their child's screen time during the Covid-19 pandemic** and up to half of parents of children aged 5-15 said they had to relax some rules about what their child did online during 2020. However, parents also recognised the value of the internet in helping their child stay connected with their friends.
- **Awareness of various technical tools and controls among parents was high** (around six in ten), but only a minority actually used any of them (around a third of parents).

[3] The negative experiences question was asked of 12-15s only, and asked about: *being contacted online by someone you don't know who wants to be your friend*, *accidentally spending money online that you didn't mean to*, *seeing or receiving something scary of troubling online like a scary video or comment*, *seeing something of a sexual nature that made you feel uncomfortable*, *feeling under pressure to send photos or other information about yourself to someone*.



[4]

[4] Figures within the 'Media use snapshot: by age' graphic above are taken from Ofcom's Children's and Parents' Media Literacy Tracker and are based on all children within each age group for ease of comparison (unless noted otherwise), whereas within the body of the report the bases may change according to the topic (e.g. online users, or users or social media, etc.).

[5]

[5] Figures within the 'Media use snapshot: by nation' graphic above are taken from Ofcom's Children's and Parents' Media Literacy Tracker and are based on all children within each UK nation for ease of comparison (unless noted otherwise), whereas within the body of the report the bases may change according to the topic (e.g. online users, or users or social media, etc.).

Sources

The report draws largely on Ofcom's quantitative *Children's and Parents' Media Literacy Tracker*[6], which has been running since 2005, and is supported by other Ofcom research: our qualitative *Children's Media Lives*[7] research, our *Life in Lockdown* study[8] our quantitative *News Consumption Survey*[9], and a CATI[10] omnibus survey conducted to provide Ofcom with key statistics on digital exclusion.

We also have insight and data from the UK's television audience measurement body, *BARB*[11], and this year we have also included further insight from research agencies *CHILDWISE*[12] and *The Insights Family*[13].

All elements of Ofcom's media literacy research (apart from *Life in Lockdown*) took place over autumn 2020 and winter 2020/21 (see timetable below).

Methodology: Ofcom's Children's and Parent's Media Literacy Tracker

In previous years, our quantitative *Children's and Parents' Media Literacy Tracker* has been conducted face-to-face, in-home, using CAPI.[14] In 2020, due to the Covid-19 pandemic – and in common with other Ofcom tracking studies with an element of in-home interviewing – it was not possible to conduct the research in this way. Instead, the survey was transitioned to two online methodologies: post-to-web[15] and online panels. To adapt the survey to be suitable for a child's self-completion, it was necessary to split it into two shorter surveys. Survey 1, conducted via both methodologies, asked about device and online access, online benefits, TV consumption, gaming, negative experiences and online safety, children's critical understanding, and parental attitudes, concerns, rules, and mediation. Survey 2, completed wholly via online panels, focused on social media, messaging, video-sharing platforms, live streaming, and other online activities. Full details of these methodologies can be found in the technical reports accompanying this report.[16]

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[6] Questionnaires, data tables and technical reports can be found here: Statistical release calendar 2021 - Ofcom

[7] Ofcom's latest Children's Media Lives report: Children's Media Lives: Year 7 findings

[8] Life in Lockdown was a Covid-19 specific wave of Ofcom's Children's Media Lives research: Children's Media Lives: Life in Lockdown report

[9] Covid-19 news and information: consumption and attitudes report: Covid-19 news and information: consumption and attitudes - Ofcom

[10] CATI = Computer Assisted Telephone Interview

[11] BARB data based on the full year of 2020: BARB | Broadcasters Audience Research Board

[12] CHILDWISE data based on fieldwork conducted September-November 2020, among 1976 children aged 5 to 16 years: CHILDWISE: http://www.childwise.co.uk/

[13] The Insights Family data based on fieldwork conducted October-December 2020: https://theinsightsfamily.com/solutions/kids-insights

[14] CAPI = Computer Assisted Personal Interview

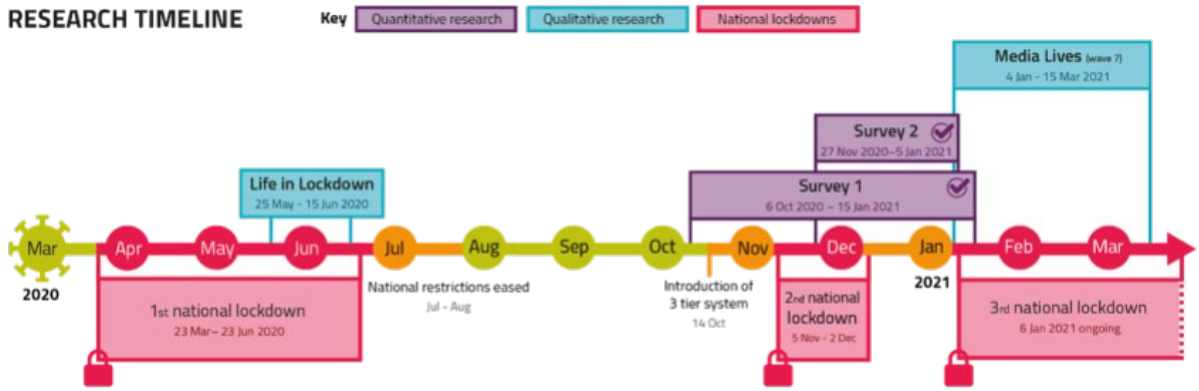
[15] With the post-to-web methodology, letters are sent at random to UK households, inviting parents of children aged 3-15 to conduct the survey online. This survey was topped up with respondents from online panels to achieve the sample sizes needed for analysis.

[16] Children's and Parents' Media Literacy Tracker: Technical Report Survey 1 and Survey 2.

Impact on trend data

As a result of this substantial shift in methodology, direct comparisons between the current and previous waves are not possible. Where feasible, we refer to substantial changes or trend direction, if we are confident that the changes reflect a genuine shift in behaviour[17]. The measures may also have been affected by the fact that the fieldwork was conducted during the Covid-19 pandemic; this is likely to have had a significant impact on use, behaviour, and attitudes, among both parents and children. Lastly, some changes may have been driven by the methodology change; we also include commentary on changes that we believe are driven primarily by this.

To place our research in context, the graphic below shows the timing of our fieldwork (both quantitative and qualitative) against the various stages of the national restrictions across 2020 and 2021.



Nations

Analysis of the UK nations will also focus on the 2020 data and will not include commentary on trends over time. As with the UK overall, the change in methodology may have affected the results. Analysis is included in those sections only where there are differences between the nations.

[17] Variations in data compared to previous years may be a permanent shift and part of a trend that continues over time, which may be reflected in future waves of fieldwork when lockdowns are not in place.

New sections for 2020/21 report

Digital exclusion

Ofcom's Technology Tracker provides data on levels of access to the internet at home. As part of our ongoing work on digital exclusion, Ofcom added additional questions to its 2021 Technology Tracker survey to understand levels of children's access to appropriate devices for home-schooling. [18]

Findings from this research complement our media literacy research[19], adding an additional layer of insight to our findings on children's access and use of the internet and devices during 2020.

Vulnerable children

For the first time, we have used our datasets to create two categories of children who may be vulnerable: those in financially vulnerable households, and those with a condition which impacts or limits their daily activities. We note that this research has not been specifically designed to provide robust analysis on vulnerable children of any specific category. However, following analysis of the data and the response rates to existing survey questions, we are confident that we can provide insight into the two categories below.

Children in financially vulnerable households

Financial vulnerability is a measure that has been devised by Ofcom to better understand the impact of income and household composition on ownership and use of communications services. The analysis creates three distinct household types by combining household income[20] and household size (including the number of children): most financially vulnerable households (MFV), potentially vulnerable households (PFV) and least financially vulnerable households (LFV).[21]

Within our report we look at any relevant differences between those children who are 'most financially vulnerable' (MFV) and those categorised as 'least financially vulnerable' (LFV).[22]

Children with a condition that impacts or limits their daily activities

Within both of the children's quantitative surveys we ask parents if their child has any condition which may limit or impact their daily activities, providing a list of these to select from.[23] Almost a

[18] The findings from this Technology Tracker research cannot be directly compared to Ofcom's previously published findings in 2020, as the 2021 survey was conducted via a different methodology (CATI vs. CAPI). The 2021 fieldwork was conducted 12 February – 5 March 2021. Data tables pertaining to digital exclusion of children can be found here: Ofcom Technology Tracker 2021 CATI omnibus survey digital exclusion data tables

[19] The Technology Tracker analysis is based on households with children of school age (4-18 year-olds), therefore direct comparisons should not be made to our media literacy research, which is based on 3-15 year olds.

[20] Among those agreeing to answer the income question.

[21] We believe that financial vulnerability may be a better measure to use than socio-economic-groups for children's access and use; we will monitor this in future waves of the research.

[22] Further detail on the sample sizes of these categories can be found in the section on financial vulnerability.

[23] Parents are asked to select from: hearing, eyesight, mobility, dexterity, breathing, mental abilities, social/behavioural, mental health, other, none, or 'prefer not to say'. The full list of conditions within each of these can be found in the Annex.

fifth of our sample, within both surveys, reported having any type of condition from our list. This proportion provided us with a sufficient base to compare to those without a condition.

We recognise that some conditions may have a more severe impact than others on daily activities, but we are not able to analyse the data by individual types of conditions due to insufficient base sizes. We will keep under review the need to conduct bespoke research to add to our evidence base in this area.

Pre-schoolers

In previous years we have included comparisons between children aged 3-4 (pre-schoolers) and children aged 5-15. However, we recognise that pre-schoolers are at a very different life stage and may demonstrate dissimilar use and behaviours of media services and devices to that of children aged 5-15. In addition, parents of pre-schoolers may have different concerns and be more, or less, likely to use certain mediation tools and techniques for this age group.

Therefore, the majority of this report will focus on children aged 5-15, with a separate section on pre-schoolers (aged 3-4).

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Key findings

Media device use

Children were using a wide range of devices in 2020

The tablet and smart TV were the devices most likely to be used by children in the home, used by around eight in ten 5-15 year-olds (81% and 78% respectively). The smart TV tended to be a household device (26% owned one themselves), while 61% of children owned a tablet.

Three-quarters of children used a mobile phone, while just under six in ten owned one (56%). Ownership was more likely in the older age group (93% of 12-15 year-olds), and as data from CHILDWISE showed, this was the device that children said they couldn't live without, especially girls aged 11-16 (72%).[24]

Just over three-quarters of children aged 5-15 used a desktop, laptop, or netbook computer in 2020 (77%); an increase compared to 2019[25], which reverses the trend observed since 2016. The same proportion used a games console or player, also an increase on 2019. These changes demonstrate children's reliance on devices during the lockdowns, both for their online home learning and for at-home entertainment.

Almost six in ten children used a smart speaker, with this device continuing its rise in popularity. While use of a radio set (35%) remained lower than smart speakers, it had increased since 2019, following a period of decline since 2010. Perhaps more time at home, and proxy use via family members, revived the use of this more traditional entertainment device.

Online access

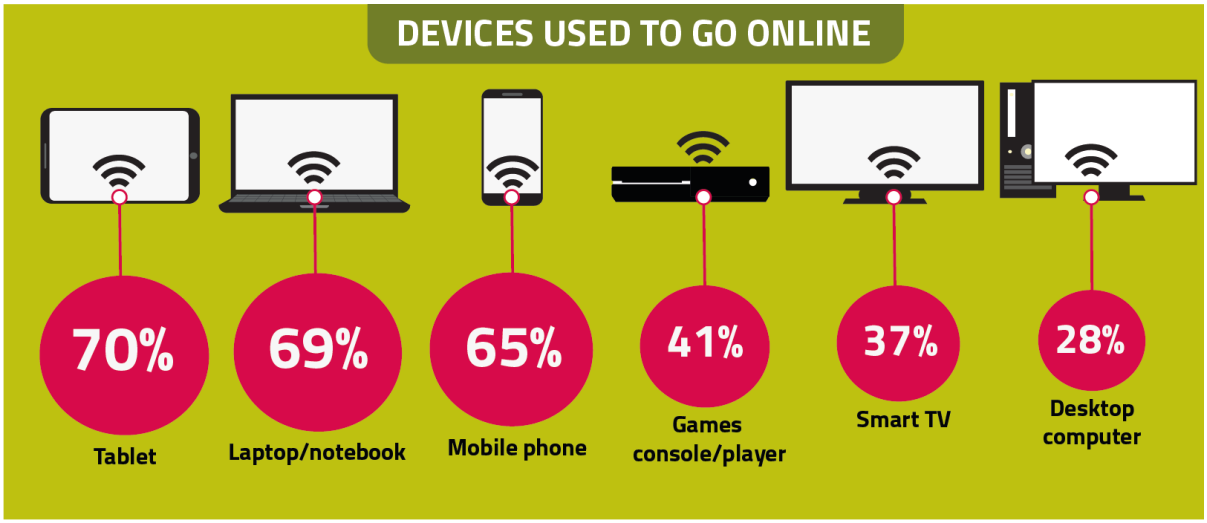
Laptops, tablets, and mobiles were the most-used devices for going online in 2020

In 2020, nearly all children aged 5-15 (97%) went online via any device; an increase since 2019[26]. Seven in ten used a laptop to go online – comparable to the proportion using a tablet or mobile phone, while around four in ten used a games console or player or a smart TV, and three in ten used a desktop.

[24] CHILDWISE: http://www.childwise.co.uk/

[25] The increases in devices used in 2020 will partly be attributable to the change in survey methodology.

[26] The increase in online use in 2020 will have been impacted by the change in methodology to online surveys.



These figures indicate a shift in the principal device for going online in 2020. In 2019, the tablet was the device most likely to be used to go online among 5-15s, higher than a laptop or mobile phone. However, use of a tablet to go online remained stable in 2020, while use of laptops, mobile phones, gaming devices, smart TVs and even desktops increased among each age group. The increased use of laptops and desktops, in particular, was probably due to the need for online home learning during 2020.

Digital exclusion

Two per cent of school-age children relied on smartphone only internet access

Our Technology Tracker 2021 research found that nearly all UK households with school-age children (between 4 and 18 years old) had internet access in the home (less than 1% did not have access at home).[27] However, 4% of these only had mobile access (that is, via a smartphone, tethering or dongle/USB, but with no fixed broadband). This decreased to 2% of those with only smartphone access (no tethering).

Children in the 'most financially vulnerable' households (MFV[28]) were more likely than those in the 'least financially vulnerable' (LFV) households to have mobile-only access (5% vs. 2%), or smartphone-only internet access (3% vs. 1%).

[27] Fieldwork conducted 12 February – 5 March 2021.

[28] The base size for households with school-age children and classed as 'most financially vulnerable' was 87. Any data with a base size under 100 should be treated with caution.

One in five children who had been home schooling did not have access to an appropriate device for their online home-learning needs all of the time

The Technology Tracker research also found that among school-aged children (aged 4-18), eight in ten had access all of the time to an appropriate device[29] at home, to enable them to connect to the internet for online home-schooling or online learning as needed. Of the remainder, 13% had access some of the time; while 2% rarely had access, and 2% never had access.[30]

The likelihood of having access to appropriate devices increased with the age of the child: around nine in ten children aged 12-18[31] had access all the time, compared to 64% of 4-7 year-olds.

During the most recent wave of our qualitative Children's Media Lives research, we saw that some children's schooling was limited by their access to the internet or certain devices. An example of this when Nathan, 14, described having an old laptop that would sometimes die when he needed it for lessons:

> "It's kind of annoying because if your internet's not working properly sometimes you don't attend… It [the internet] doesn't drop out; it's just the laptop is quite faulty… it overheats quickly"
>
> *Nathan aged 14*

Among children considered to be vulnerable, those in MFV households were more likely than those in LFV households to be affected by a lack of access to an appropriate device, according to the Technology Tracker research. While more than seven in ten children from MFV households had access *all* the time (72%), this was lower than the proportion of children in LFV households (86%).

Children in households where the parent or guardian had an impacting or limiting condition were less likely to have access to appropriate devices *all* the time: 72% compared to 82% of children where the parent had no condition.

Two-thirds of children without full-time access to appropriate devices at home shared a device to manage home schooling, while 3% were unable to do their schoolwork

Of those without access to an appropriate device all the time, device sharing was the most common method for managing this, with two-thirds of children doing so.[32] This was followed by children carrying out another educational activity such as watching an educational programme (26%).

Fifteen per cent of these children had to postpone their learning until a device was available, 9% borrowed a device, and 6% used a device that was less appropriate. Three per cent of children without access to an appropriate device all the time had to leave their schoolwork, or that it just wasn't possible.

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[29] Parents were asked: *'To what extent do the children in your household have access at home to appropriate devices based on their schooling requirement, to enable them to connect to the internet for online schooling or online learning as needed?'*

[30] A further 3% of children said they had not been home schooling.

[31] 89% of 12-15 year-olds, and 91% of 16-18 year-olds.

[32] Note there were no differences in how to manage device access between MFV and LFV households.

Content consumption

Research from CHILDWISE[33] showed that children spent more time watching content (programmes, video and short clips) in 2020 than they did before (from 2 hours 54 minutes in 2019 to 3 hours 18 minutes in 2020).

This section of our report focuses on the various forms of content available: video-sharing platforms (VSPs), live streaming, live TV, and on-demand content.

Children's use of VSPs to watch content was nearly universal, with a majority using VSPs more during the Covid-19 pandemic than before

The consumption of content via VSPs[34] was omnipresent among children, with 97% of 5-15s doing this in 2020. Covid-19 increased this behaviour; seven in ten children aged 8-15 said they had used VSPs *more* during the Covid-19 pandemic than before. In line with this, research by The Insights Family[35] revealed that at the end of 2020, two of the top three favourite apps among children aged 5-15 were VSPs (YouTube and TikTok).[36]

Ofcom's media literacy research found that YouTube was the most-used VSP among children aged 5-15 for watching content in 2020 (87%). And research by CHILDWISE highlights YouTube's sizeable presence in children's daily lives: 58% of children said that they used YouTube every day, spending on average almost two and a half hours a day doing so.[37]

Our research also found that almost half of 5-15s used TikTok to watch content in 2020, and around a third watched content on Instagram, Facebook and Snapchat. A minority of 5-15s used Go Noodle (6%), Vimeo (6%), Dailymotion (4%) and Dubsmash (4%).

While use of YouTube (to watch content) was consistent across ages, TikTok (65%), Instagram (65%), Facebook (50%) and Snapchat (53%) were more likely to be used by 12-15s. Among this age group, girls were more likely than boys to use TikTok and Snapchat, but no differences by gender were seen in use of the other sites/apps.

[33] CHILDWISE: http://www.childwise.co.uk/

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

[35] The Insights Family: https://theinsightsfamily.com/solutions/kids-insights

[36] The other favourite app in the top three among children was Roblox.

[37] CHILDWISE: http://www.childwise.co.uk/

Our Life in Lockdown[38] study, conducted in May-July 2020, showed that early on in the Covid-19 pandemic TikTok was hugely popular with our participants. William (then aged 16) said:

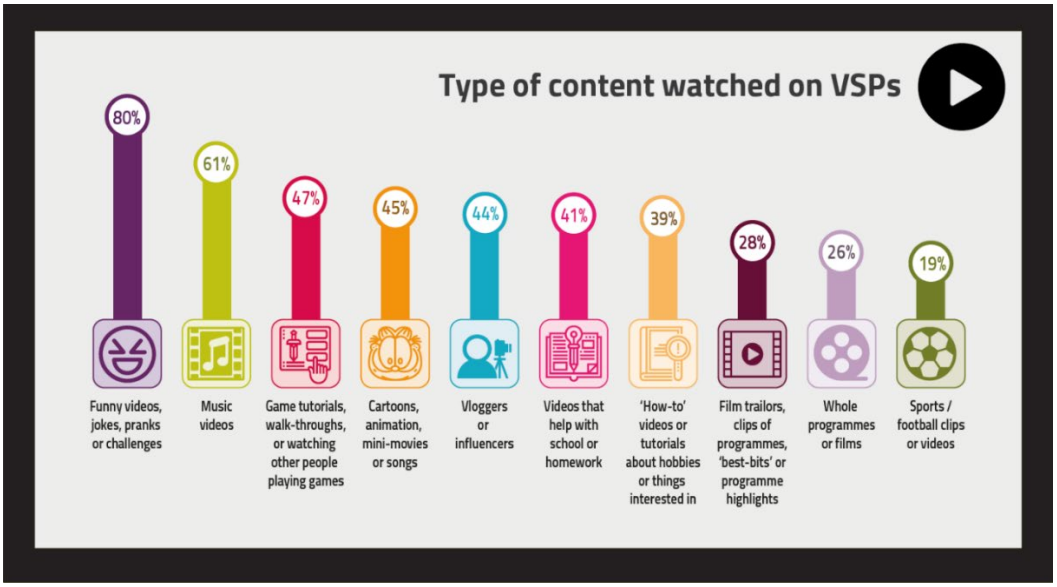
> "You go on it for five minutes, and then you end [up] scrolling for two hours. It's just addicting [sic] – once you get scrolling you just keep on doing it – I don't know what it is about it"
>
> *William aged 16*

And it continued to be the dominant media platform (in terms of time spent) in the most recent wave of Children's Media Lives, conducted in early 2021.

Funny videos and pranks were the most-watched content, but this varies by age

Among all 5-15s, 80% nominated funny videos, jokes, pranks, and challenges. However, popularity of other types of content differed by age; 5-7s were more likely to nominate cartoons, animations, and mini-movies or songs, whereas 8-15s were more likely to choose music videos.

A number of other types of video content were watched by smaller, but still significant, proportions of 5-15s:



Up to half of children said they watched vloggers or YouTube influencers; this was more likely among 8-11s (47%) and 12-15s (49%) than among younger children aged 5-7 (34%). According to The Insights Family[39] the choice of vlogger varied by gender; KSI and PewDiePie were the favoured among the older boys (aged 12-15), while Zoella was the clear favourite among girls this age.[40]

[38] Life in Lockdown was an ad-hoc study, commissioned by Ofcom, to assess the Children's Media Lives participants' experience of lockdown that took place over six weeks between May and July 2020: https://www.ofcom.org.uk/__data/assets/pdf_file/0024/200976/cml-life-in-lockdown-report.pdf

[39] The Insights Family: https://theinsightsfamily.com/solutions/kids-insights

[40] Vlogger profile information from Wikipedia: KSI provides vlog and comedy style videos via his two YouTube channels. As of March 2021, he had over 34 million subscribers and over 8 billion video views. (continued)

Some of our Children's Media Lives participants followed particular influencers to whom they felt they could relate. In the 2019 wave of the study, we saw that participants were following an increasing number of peer-to-peer or local influencers alongside big-name stars. And in this most recent wave we found that many of the children in the study were seeking content from influencers they found 'relatable'.

For example, when reflecting on why she liked content posted by British YouTubers Summer XO and Amelia-Mae Pritchard, Shaniqua, 16, intimated they were more similar to her than some of the more famous YouTubers. In similar vein, Peter, 15, who followed body-sculpting and weightlifting influencers like Mike Thurston and Eddie Hall, said that he found them aspirational and relatable:

> "[Seeing their content] motivates you to keep going, because they all started off the same as you"

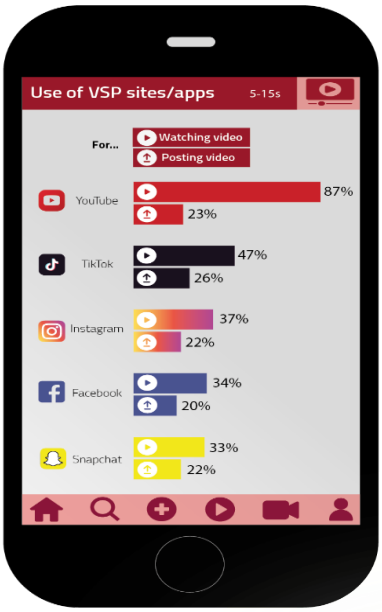
And in relation to Mike Thurston specifically:

> "I think he's having fun and being himself…He's really relatable"
>
> *Peter aged 15*

Three-quarters of older children posted or shared content on VSPs

Over half of 5-15s said they posted or shared content[41] on VSPs during 2020, ranging from 39% of 5-7s to 75% of 12-15s. Given this, making videos was one of the online creative activities that children were most likely to do in 2020; six in ten 5-15s overall who went online said they did this, rising to seven in ten children aged 12-15.[42]

No single platform was used by a majority of children for posting or sharing content; similar proportions (around a quarter) of 5-15s said they used TikTok, YouTube, Instagram, or Snapchat for posting or sharing content. Among older children (aged 12-15), around four in ten used TikTok, Instagram and Snapchat for posting or sharing; a quarter said they used YouTube.



PewDiePie provides vlogs, comedy, and music videos. As of March 2021, his YouTube channel had over 109 million subscribers and over 27 billion views.
Zoella is a vlogger, businesswoman and author, with a range of beauty and homeware products. As at March 2021, she had 11.1 million subscribers to her main videos, and 4.86 million to her vlogs

[41] Our survey asked which sites or apps were used to post videos online or to share videos; we do not ask about other active engagement such as commenting on other people's videos. We also do not specify whether the videos are the child's own or sharing others' content.

[42] The same proportion (almost six in ten) said they made or drew pictures online, more prevalent among 5-11s.

Although there was no difference overall between boys' and girls' likelihood of posting or sharing content via VSPs, boys aged 5-15 were more likely to choose YouTube for this activity, while girls were more likely to choose TikTok and Snapchat.

Using filters to alter their appearance when posting content had become pretty much ubiquitous among the participants of the 2021 wave of Children's Media Lives, and for most of them there was a desire for these changes to look natural or 'not too obvious'.

We also saw evidence that for some, the 'copy-catting' behaviour that we first saw in the 2019 wave (where users emulate content that other people have posted) was a way of using the online space to 'try on' different identities, or work out how they wanted to present themselves. For example, both Shriya, 16, and Freya, 17, followed accounts on Instagram to gain inspiration for their own posts and often copied others' posts in order to create and promote their own online identities.

Up to a fifth of children posted or shared content via live streaming platforms

Some platforms also allow users to livestream (videos streamed by users in real time). In 2020, almost half of children aged 8-15 said they had used live streaming services to watch other people's live streams and live videos; this was more likely among 12-15s (50%) than among 8-11s (40%). The older age group were also more likely to say they had 'gone live' themselves, by sharing their own videos with others (17% vs. 8% of 8-11s).

Among the older age group, Instagram Live and YouTube Live were the sites or apps most likely to be used (38% and 32% respectively among 12-15s), followed by a quarter using Facebook Live. While YouTube Live was also the most likely to be used by 8-11 year-olds (by 30%), around one in ten used Instagram Live or Facebook Live.

Meanwhile, Twitch, one of the leading streaming platforms for gamers, was used by 7% of 5-15s overall.

We also saw an increase in engagement with live streaming among some of our Children's Media Lives' participants, who were either viewing streams or attempting to become streamers themselves.

There were different motivations for this engagement. Nathan, 14, enjoyed feeling as if he was part of the action while others felt it was a way of sharing their interests (especially if they happened to be interested in gaming).

However, as in previous waves, several participants recognised that streaming could be an opportunity to both gain attention and make money for themselves. For example, William, 17, was earning money by helping fellow players of Destiny 2 to 'level up'[43] in the game, as well as through streaming his gaming via his Twitch account, and saw earning money as the prime motivation for his streaming.

[43] 'Level up' means to progress to the next level of player character stats and abilities. William was working for Best Destiny Carries, an American company, that allows Destiny players around the world to pay for 'Sherpas' (players like William) to complete objectives they're unable to themselves.

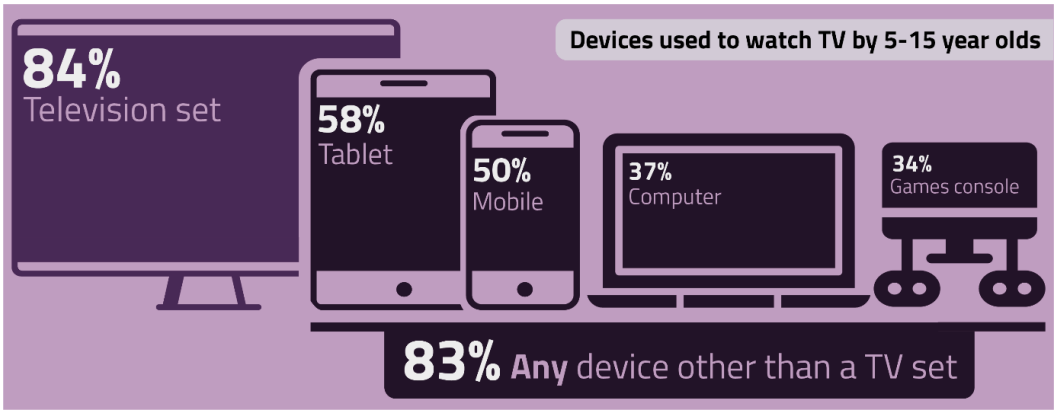
The Covid-19 pandemic has hastened the trend towards alternative devices for watching TV programmes

It is clear that during 2020 children were keeping themselves entertained by watching, and sometimes sharing, video content online. Watching TV programmes was also a key form of entertainment, with 98% of 5-15s doing this.

However, during 2020 there was a change in how children watched TV programmes. For the first time, children were as likely to watch TV programmes on any device other than a TV set, as to watch on a TV set. This was due to a rise in the use of other devices and the decline in the proportion of children using a TV set since 2019.

Of the alternative devices used, 58% of children aged 5-15 watched TV programmes on a tablet in 2020, while 50% watched on a mobile phone. More than a third of children watched on a laptop or desktop, or on a games console or player.

Boys were more likely than girls to use a games console or player to watch TV content (42% vs. 26%), while girls were more likely to use a desktop computer or laptop than boys (40% vs. 33%).



Children were also 'multi-screening' while watching TV. According to The Insights Family, up to a quarter of children aged 5-15 used their mobile phone or tablet at the same time as watching TV – increasing to almost four in ten 12-15s.[44]

We have seen 'multi-screening' among the participants of Children's Media Lives since 2018, and by the latest wave this had become part of everyday life for the majority of them. For the most part, this was to browse social media on their phones while also watching content, gaming, or learning on another device. Peter, 15, suggested that this felt similar to group activities that he might be doing if he was not in lockdown:

> "I feel like it doesn't distract me from my work… I just respond to my messages and put it down. In a normal classroom you don't sit in silence - you still have to speak to your friends"
>
> *Peter aged 15*

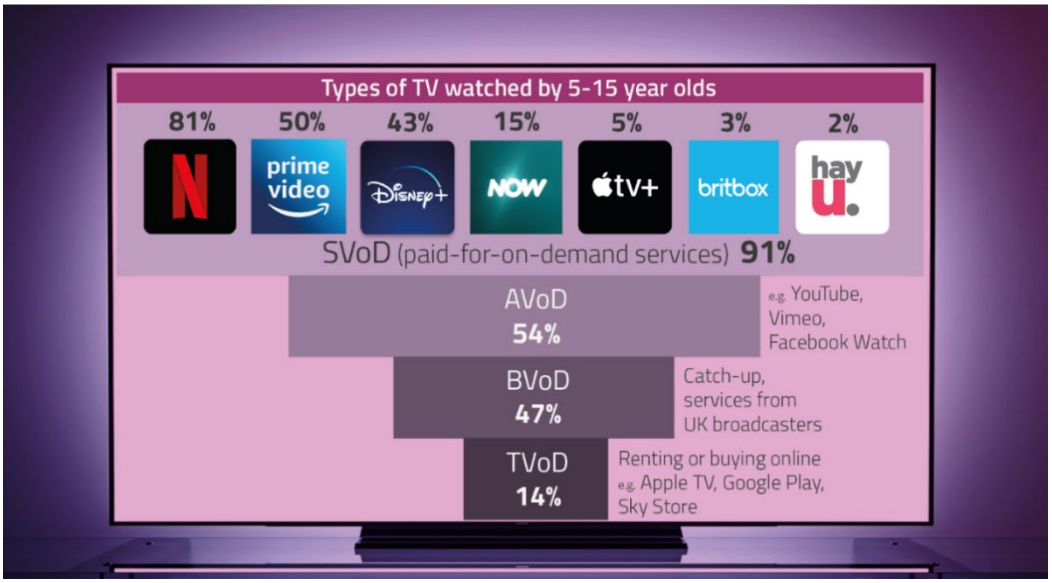
[44] The Insights Family: https://theinsightsfamily.com/solutions/kids-insights

Children were almost twice as likely to watch TV programmes on video-on-demand (VoD) than on live broadcast TV

The Covid-19 pandemic also appears to have accelerated the trend towards video-on-demand (VoD) content[45] over live TV. In 2020, parents of almost all 5-15s said their child watched any type of VoD content (96%) compared to 56% saying they watched live broadcast TV.[46]

While use of all VoD services increased in 2020, use of paid-for/ subscription-video-on-demand services (SVoD) was by far the most popular. Nine in ten 5-15s watched TV programmes through SVoD services, compared to around half of 5-15s who watched advertising-based VoD (AVoD) or broadcaster VoD (BVoD) services.

There were increases in the proportions watching almost all of the SVoD services we asked about, although Netflix remained the most likely to be watched – by eight in ten 5-15s.



As in previous waves of our Children's Media Lives study, during the latest wave in 2021 none of the children in our sample were watching live television regularly. In fact, while they might use the term 'watching TV' occasionally to indicate viewing a specific programme broadcast via terrestrial

[45] VoD services include TV catch-up and online film services which can be viewed on any device with an internet connection, such as tablets, computers, mobile phones, and connected TV sets.

[46] Within the media literacy survey we asked parents which of the following ways did their child watch TV programmes or films:
'*Watching programmes at the time they are broadcast on scheduled TV – so, for example, watching Britain's Got Talent on ITV on Saturday night*' (classed as 'live TV' for the purpose of analysis),
'*Watching through any online or catch-up services from UK broadcasters like BBC iPlayer, ITV Hub or All 4*' (classed as BVoD = broadcaster video-on-demand),
'*Watching through any paid-for on-demand services like Netflix, Amazon Prime Video or Disney+*' (classed as SVoD = subscription video-on-demand)',
'*Through renting or buying programmes or films from online stores like Apple TV, Google Play Store or Sky Store*' (classed as TVoD = transactional video-on-demand),
'*Watching programmes or films on other websites or apps like YouTube, Vimeo, Facebook Watch, Pluto TV and Snapchat*' (classed as AVoD = advertising based video-on-demand),
'*Watching Blu rays/ DVDs/ videos*'
'*Watching something that was shown on TV that has been recorded to watch at another time*'.

television, they predominantly used it to refer to watching on-demand content. And the most popular platforms for TV-like content were YouTube and Netflix.

> "I don't even know the last time I watched live TV. Probably not since the first lockdown"
>
> *Ben aged 13*

While our participants were not sitting down to watch programmes live, the majority referred to binge-watching series (watching multiple episodes of a series in a relatively short period of time). For example, Jack, 16, had been binge-watching the British comedy-drama series Ackley Bridge:

> "I'm not sure what I like about it, it is just one of those things that is addictive. You just watch episode after episode"
>
> *Jack aged 16*

Figures from BARB (the UK TV audience measurement body) also show the overall decline in watching broadcast TV content among children. In 2020, children aged 4-15 watched an average of 6 hours 54 minutes of broadcast content on the TV set per week – down by 35 minutes since 2019[47] (see graphic below).

BARB also measures catch-up viewing on Digital Video Recorders (DVRs) and BVoD services between eight and 28 days after broadcast. BVoD services also offer programmes which have not been recently shown on linear broadcast channels. When combining both of these with the above weekly viewing among children (6 hours 54 minutes), total viewing of *broadcaster content* increased to 7 hours 41 minutes in 2020.

BARB data also shows that in 2020, for the first time, children's viewing of non-broadcast content on the TV set (such as SVoD or VSPs[48]) overtook viewing of broadcast content. Children aged 4-15 watched 11 hours 19 minutes of this a week (up from 7 hours 49 minutes in 2019).

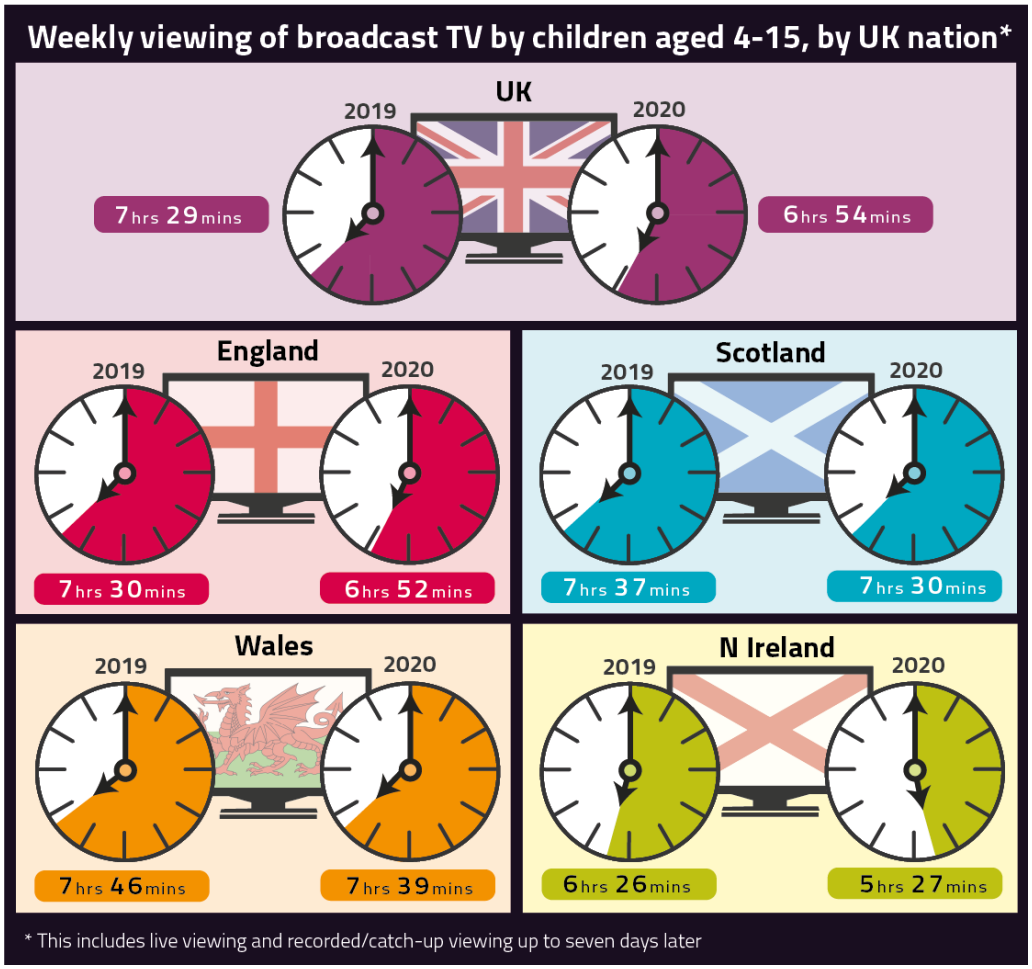
Northern Ireland saw the largest decline in watching broadcast TV

According to BARB, the decline in watching broadcast TV among children aged 4-15 occurred within each of the UK nations. However, the biggest drop (down 59 minutes in 2020) was in Northern Ireland.

In Scotland and Wales, broadcast TV viewing fared better; each was down just 7 minutes since 2019, whereas the decline in England was down by 38 minutes.

[47] This included live viewing and recorded/catch-up viewing up to seven days later.

[48] Viewing of SVoD services and VSPs are included in BARB's 'unmatched content'. Unmatched viewing is when the TV set is in use, but the content cannot be audio-matched or otherwise identified. It includes gaming, viewing DVDs/box sets/archives, SVoD, VSPs, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content.



Although children's viewing of broadcast TV was declining, family-oriented programmes still drew their attention, particularly over the Christmas period. For children across the UK aged 8-15, BBC One's *Happy New Year Live!* was the most viewed programme across the whole of 2020, while for the younger audience (5-7s) it was again BBC One: *Zog and the Flying Doctors* (broadcast on Christmas Day).[49]

Around a quarter of children aged 8-15 did not feel there were enough programmes that showed children that looked like them[50]

As part of our research, we asked children aged 8-15 who watched TV how well represented they felt by TV programmes (whether on broadcast TV or on-demand). In 2020, a substantial minority of children felt there were not enough programmes that included children from the same part of the

[49] The top viewed programmes by children aged 4-15 varied for the UK nations: in Scotland it was *Ant and Dec's Saturday Night Takeaway,* while in Wales and Northern Ireland it was *I'm a Celebrity … Get me out of here!*

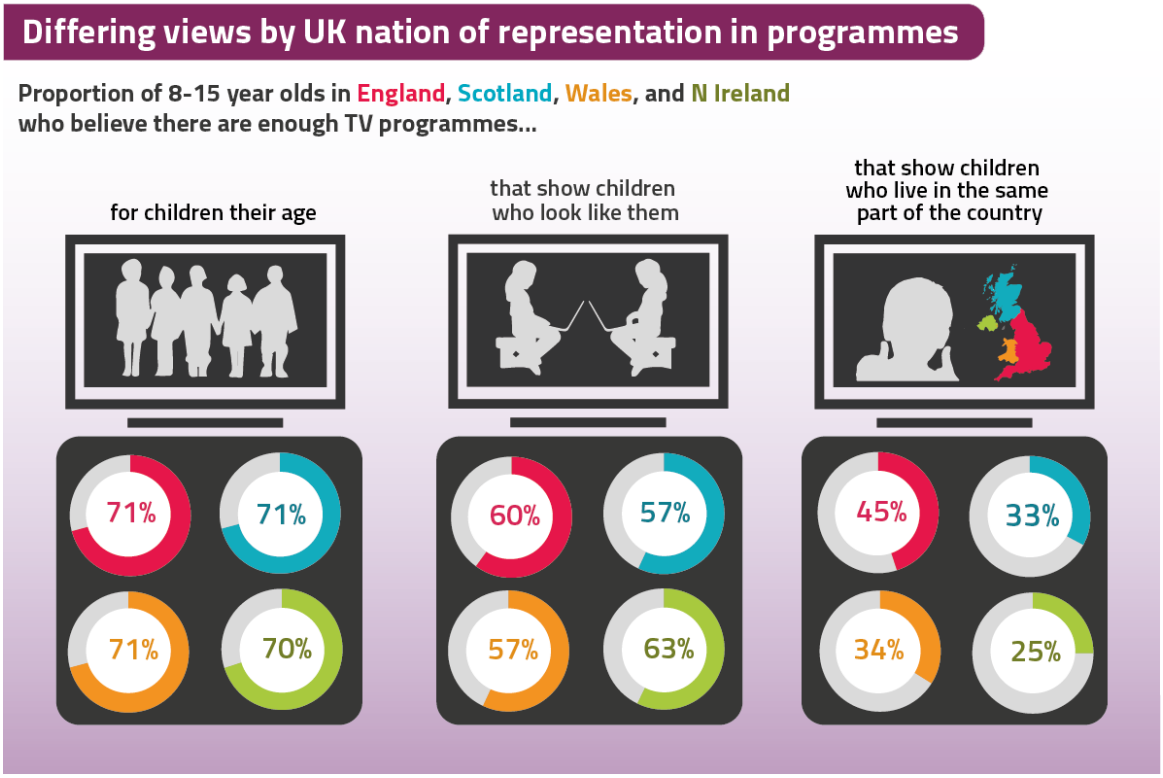
[50] Our actions following the Children's content review are to monitor the effectiveness of the PSBs' delivery, as part of our ongoing PSB Review, and ultimately, as part of the next PSB relicensing process. In addition, we will continue to look at the BBC's performance in catering for children, as part of our responsibilities under the BBC Charter and Agreement.

country as them (35%), that showed children that looked like them (23%) or were for children their age (22%).[51]

Children in Scotland, Wales and Northern Ireland were less likely than children in England, to feel there were enough programmes that showed children from the same country as them

Across the UK nations there were no differences in the proportions of children aged 8-15 feeling that there were enough programmes for children their age, or that showed children that looked like them.

Children aged 8-15 in the UK nations of Scotland, Wales and Northern Ireland, however, were less likely than children in England to feel there were enough programmes that showed children from the same part of the country as them: 33% in Scotland, 34% in Wales, 25% in Northern Ireland (compared to 45% in England).[52]



[51] Proportions who agreed that there were enough programmes in any of these categories: 71% '*programmes for children their age*', 60% '*programmes that showed children that looked like them*', and 43% '*programmes that showed children from the same part of the country as them*'.

[52] While children in the UK nations of Scotland, Wales and Northern Ireland were less likely to feel this than children in England, they were comparable to each other in this measure.

Online gaming

Children were using a range of devices to play games online

Another fundamental form of entertainment for children in 2020 was online gaming. Our research showed that around seven in ten children aged 5-15 played games online during 2020. Older children were more likely to do this (80% of 8-11s and 86% of 12-15s) than younger children (55% of 5-7s); and boys were more likely than girls to play games online (78% vs. 64%).

Children were using a range of devices to play games (whether online or otherwise). The most popular device was a games console or player, used by 69% of 5-15s, followed by almost six in ten using a tablet or mobile phone. Almost four in ten used a laptop or desktop. All of these devices were more likely to be used for gaming in 2020 than in 2019.

Gaming seems to be increasing in popularity among girls; research by The Insights Family revealed that 'video games' had moved up to third place in the list of favourite hobbies among girls, from seventh place in 2019 (while being in the top two for boys, both years).[53]

The Insights Family data also revealed that time spent on 'video games' in a typical day increased slightly in 2020 among children aged 5-15 overall (up 5 minutes since 2019, to 1 hour 21 minutes). Children aged 12-15 reported the longest time playing, at 1 hour 28 minutes – an increase of nine minutes since 2019. Boys in this age group spent the longest time playing, compared to both genders across all age groups, at 1 hour 48 minutes in 2020 – an increase of 8 minutes on the previous year. Although girls in this age group were less likely than boys to play video games (at 1 hour 9 minutes), they had also increased their use since 2019 (by 12 minutes).

However, the main driver for the overall increase among 5-15s was among younger boys aged 5-7. Boys in this age group showed an increase of 24 minutes since 2019, to 1 hour 26 minutes in 2020.[54]

Boys, in particular, used online gaming to connect to others

As well as boys being more likely than girls to play games online, they were also more likely than girls to use this platform as a way of connecting to their friends during the Covid-19 pandemic.

The most likely method of playing games online among children aged 5-15 was with or against someone else they knew or had met in person (57%), followed by half playing on their own (against the games console/ player/ computer). However, a quarter said they played games online with or against people they did not know or had not met in person.

[53] The Insights Family: https://theinsightsfamily.com/solutions/kids-insights

[54] The Insights Family: https://theinsightsfamily.com/solutions/kids-insights: Boys aged 8-11 spent 1 hour 34 minutes playing video games in 2020 – again more likely than girls (at 1 hour 9 minutes), and both comparable to 2019 use.

Boys were more likely than girls to use all of these methods (62%, 57%, 28% respectively vs. girls 53%, 46%, 21%). Older children were more likely to play against people that they knew; rising to 79% of boys aged 12-15 (vs. 67% of girls).

In both our Life in Lockdown study and our Children's Media Lives research we found that gaming was a primary activity for most of the boys, and this was an opportunity for them to catch up and keep up with their social lives. For example, in our more recent Children's Media Lives research, we found that Nathan spent a lot of time gaming at the weekend and primarily did so to spend time with his friends:

> "Most of the day on the weekend is on the Xbox, because most of my friends are online at the weekend and we play together a lot… probably like ten hours"
>
> *Nathan aged 14*

However, this was not solely restricted to the boys in the sample; in Life in Lockdown we found that both Alice and Josie (then aged 15) were playing games with friends online. And, this remained the case for Josie (now 16), in the more recent research, who was spending hours each day gaming.

We also found that for some older children in the study, making 'online-only' friends (sometimes via social media platforms like Discord or Yubo) had become more usual than in previous waves.

A substantial minority of children chatted to people they did not know within online games

Chatting to others within games increased in 2020, to three-quarters of children aged 8-15s.[55] Boys were more likely to do this than girls; 81% vs. 66% of girls.

Children were more likely to chat to people they knew (67%) than to those they did not know outside of the game (22%) – comparable by gender.

However, among those who did not want to engage with people they didn't know, 66% of children aged 12-15[56] said they knew how to block people when playing online games – 41% had actually done this.

Some parents of children who played games tried to overcome their child's likelihood of doing this: 42% had rules in place about whom their child could play games with or against. This was highest among parents of 8-11 year-olds (52%).

[55] We ask children aged 8-15 if they ever chat through the game to other people who are playing through instant messaging or using a headset.

[56] This was asked only of the older age group of 12-15s.

Parents were most concerned about in-game spending and potential bullying within games

Overall, 45% of parents of children who played games said they were concerned about the possibility of their child being bullied by other players. For some parents this concern was valid. Among the children aged 8-15 who agreed to answer questions about problems that can be encountered on mobiles and online[57], three in ten said they had ever been bullied.[58] Of these, 38% said it was through online games. This was significantly more likely to happen to children aged 8-11 (48%) than to 12-15s (31%); and to boys (49%) than girls (29%).

However, the most prevalent concern among parents was the pressure on their child to make in-game purchases (50%). Meanwhile, 38% of parents expressed concerns about the content of the games that their children were playing, while 58% said they had rules about only playing games with appropriate content

Parents in Wales were less likely to have certain rules in place for gaming than parents in the other UK nations

While almost half of UK parents of 5-15s whose child played online games were concerned about the possibility of their child being bullied when playing, this was more likely among parents in Northern Ireland (54%) than those in England (44%). There were no differences within the nations for other gaming concerns.

Parents in Wales were less likely to have certain rules in place for gaming than those in some of the other UK nations. They were less likely than parents in Northern Ireland to have rules about how much time their child could spend playing games (48% vs. 61%), or whom their child could play games with or against (38% vs. 50%). And they were less likely than parents in both Northern Ireland and England to have rules in place about when their child could play games (37% compared to 49% and 52% respectively).

Parents in Scotland returned comparable results with regard to rules as those in the other UK nations.

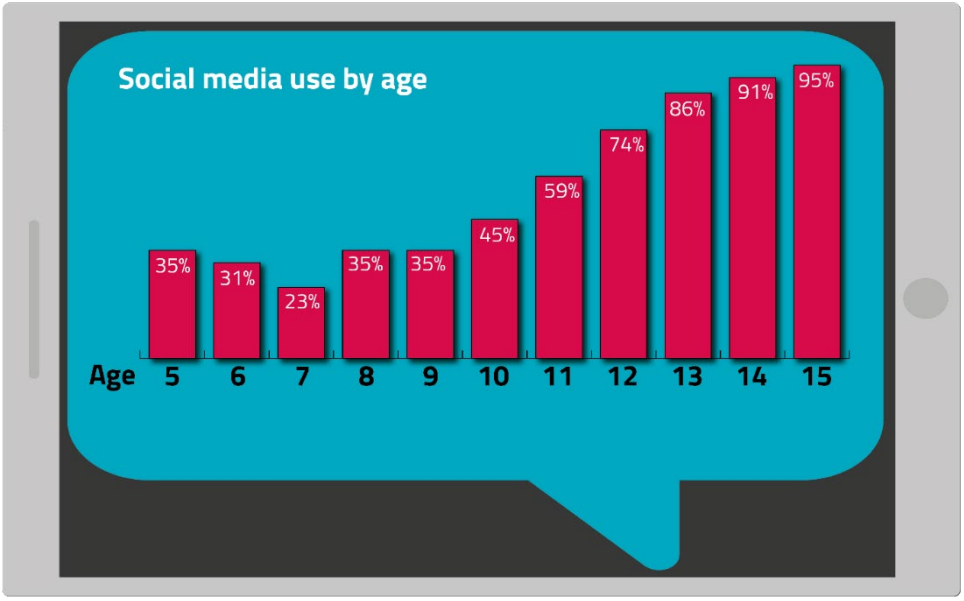
[57] Ninety-one per cent of children aged 8-15 agreed to answer questions of this nature on our survey.

[58] We have determined the term of being 'bullied' via our survey question: 'People being nasty or hurtful could be behind someone's back, to their face, through calls or texts. It could be by being nasty through social media, games or other websites. It could be by calling people names, leaving them out, or through sharing photos or videos that upset them. It could be threatening to hurt or actually hurting them. It could be done on purpose or as a joke that goes too far.'

Social media, messaging, and video calling

More than four in ten children reported using social media sites or apps before they reached the minimum age requirement, and a substantial minority of parents said they would allow this

Overall, just over half of 5-15s used social media sites or apps in 2020 (55%), with incidence increasing with age to 87% of 12-15s.[59] For most social media platforms, the minimum age requirement is 13; however, our research showed that 42% of children under the minimum age requirement (that is, aged between 5 and 12 years old) used social media.



Parents were asked if they were aware of a minimum age requirement to have a profile on most social media sites or apps, such as Instagram, Snapchat, Facebook or TikTok. Almost nine in ten parents of 5-15s said they were aware of this, yet less than four in ten were able to accurately state the minimum age requirement for most social media sites and apps as 13 years-old.[60] Around half stated an incorrect age or were unsure of the correct age. While parents of girls were more likely than parents of boys to be aware that there was an age requirement, there was no difference in being able to state the correct age.

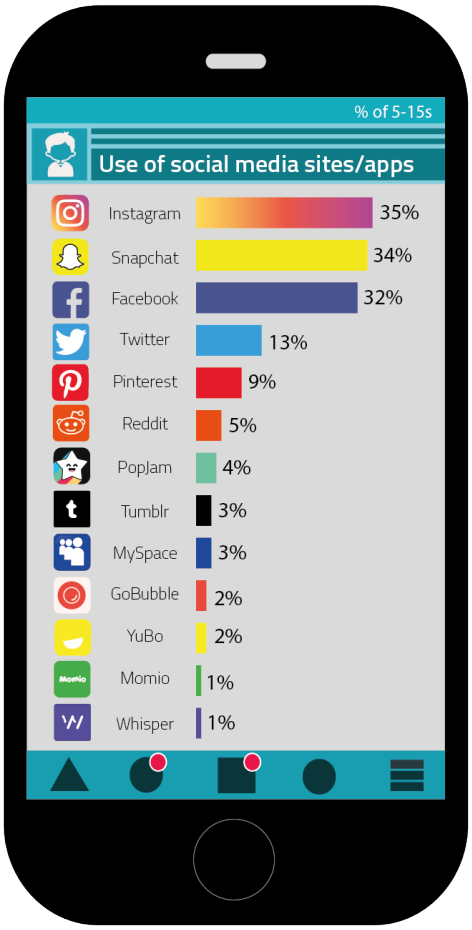
Three in ten parents of children below the minimum age requirement (that is, aged between 5 and 12) said they would allow their child to use social media despite the age requirement.

[59] The question about use of social media was worded as: (to parents) 'Which, if any, of these social media apps or sites does your child use?' and (to children) *'Can you please have a look at this list of apps or sites. These are sometimes called social media sites or apps. Which, if any, of these do you use?'*. Use by children aged 5-7 was provided by parents, while children aged 8-15 self-reported their use. It does not necessarily mean the children had a profile on the sites or apps named in the survey.

[60] The minimum age requirement for messaging service WhatsApp is 16 years-old, whereas for most other social media services is it 13.

Children were using a diverse range of social media services

Children used a wide range of sites and apps for their social media activities, continuing the diversification we have seen in previous years. Among the older children (12-15s), Instagram was the app *most likely* to be used (66%), followed by Snapchat (58%) and Facebook (54%). Among 8-11s, there was comparable use of these three (used by around a fifth). The only differences in use by gender was that girls were more likely than boys to use either Snapchat or Pinterest, particularly those aged 12-15.



A few of the participants in our Children's Media Lives study observed that they were seeing similar content across various social media platforms. The screen recording data gathered during the 2021 wave showed that it was common to see content from one platform re-posted on another by users of both platforms:

> "I feel like I use [Instagram] quite a lot like TikTok – just watching entertaining videos really. The videos are the same, some of them are copied from it"
>
> *Peter aged 15*

Social media, messaging apps and video calling were used by a majority to connect with friends during the Covid-19 pandemic

The internet offers many ways in which children can connect to their friends, from social media and gaming to messaging and chat apps, and video calling.

Overall, three-quarters of 8-15s made use of video calling in 2020. Girls were more likely than boys to use this form of connection (81% vs. 71%), especially for calling friends (83% vs. 73% of those using these platforms). Half used them to stay in touch with their grandparents during the Covid-19 pandemic, followed by other family members, and a fifth used them to call their teachers.

Meanwhile, two-thirds of 5-15s used one of the many messaging and chat sites and apps available – increasing to 91% among the older children (12-15s). Among these, two-thirds of the 8-15 year-olds also said they had used messaging and chat sites and apps more often in 2020 than before, underlining the importance of digital technology in enabling connections when children are away from their friends. WhatsApp was clearly the preferred messaging and chat platform, with 78% of 12-15s and 53% of 8-11s using it[61]. Smaller proportions used other messaging and chat platforms: a

[61] The minimum age requirement for using WhatsApp is now 16 years old, unlike many others which are 13.

quarter used Facebook Messenger, and around one in ten used other services like Skype, Discord and HouseParty.

And, as seen with VSPs and messaging apps, two-thirds of 8-15s said they had used social media more often in 2020 than before. This is unsurprising, as nine in ten 8-15s said that using social media made them feel happy and closer to their friends.

Children demonstrated various ways of connecting with their friends via social media and messaging apps; two-thirds of 8-15s used them to see what their friends were doing, and to like or comment on their posts or photos; almost half were checking in on their friends by sending supportive messages, comments or posts if they thought they were having a hard time. Both of these activities were more likely to be done by girls aged 12-15 than by boys of this age (71% of girls vs. 61% of boys, 54% of girls vs. 41% of boys respectively).[62]

Turning to our qualitative research, we saw from Life in Lockdown that in the early stages of the pandemic, many children in the study had developed new routines and behaviours around socialising online, including regular check-ins on particular apps. For example, Shriya, (then aged 15) was using Netflix Party (since renamed Teleparty) to watch streamed content with her friends, albeit remotely; and, Josie (also then aged 15) was using a mix of Zoom, Skype, Snapchat and Discord to keep in touch with her friends.

But friendships also waned with the lack of face-to-face contact

However, while we continued to see these methods of contact being used in the recent wave of Children's Media Lives, there was evidence that enthusiasm for these ways of maintaining friendships had waned among some participants. A lot of the children were talking to fewer people online and doing so less often than previously; and maintaining friendships during the Covid-19 pandemic was seen to be harder than it had been before.

For example, Freya, 17, said:

> "I've been keeping myself to myself, but I'll catch up with them [friends] if they reach out… I've been feeling like I need to work on myself and have a little break"
>
> *Freya aged 17*

We also saw that some younger participants' social connections could be dictated by the platforms they used. For example, Suzy, 10, could only speak to her school friends if they too had a smartphone. While Isaac, 15, who had a PlayStation, explained that it could be difficult to interact with his friends who had a different gaming device:

> "One of my friends has an Xbox so I can't really talk to him as much... and I used to play with him a lot. And there are some friends that have Xbox that I can't really play with because there is not a lot of cross play between the Xbox and PlayStation"
>
> *Isaac aged 15*

[62] Children aged 8-11 were not asked this prior to 2020.

Our quantitative research also showed that social media was used not only to connect with friends, but also to keep up with the outside world. Half of social media or messaging and chat users aged 8-15 used these to see what famous people were doing and to follow celebrities, while 27% followed companies or brands that they liked. Two in ten 8-15s used it to share and discuss new stories with others, while one in ten supported causes or organisations by sharing or commenting on posts, or by signing petitions.

Children experienced similar levels of social pressure offline as online

While social media has many benefits, there are some more negative elements.

The majority of children aged 12-15 in our study who used social media, or messaging sites or apps, said that they had felt pressure to be popular on social media, messaging or VSPs (89%), with even more saying they felt that people were mean or unkind to each other on these types of platforms (95%). While older children were more likely to feel like this, similar proportions of 8-11s echoed this (83% feeling pressure, and 88% feeling that people were unkind).

Our research revealed that comparable proportions of children felt the same pressures and worries in real life, showing that these social pressures were not limited to social media.

Bullying is another potential negative element of social media and other online platforms. Overall, three in ten 8-15s who agreed to answer questions about problems encountered when using mobiles or online said they had been bullied - although this was not always via a screen.[63]

Children aged 8-11 who claimed they had been bullied said it was more likely to have happened face-to-face (61%) or via online gaming (48%); while fewer said it had occurred via text or messaging apps (29%) or social media (24%).

Although the older children (12-15s) were as likely as the younger ones to have been bullied face-to-face (60%), they were more likely to have encountered this via text or messaging apps (54%) or on social media sites and apps (53%). They were, however, less likely than 8-11s to have been bullied within online games (31% vs. 48% of 8-11s).

Up to a fifth of children used anonymous Q&A sites

An alternative way for children to link to the outside world during the Covid-19 pandemic was via anonymous Q&A sites or apps, such as YoLo and Ask.fm. However, these kinds of sites/apps have the potential to expose children to inappropriate content or cyber-bullying. Users ask and answer questions put to them, and others, anonymously, without knowing the identity or age of the other users.

[63] The question posed to children was that people being nasty or hurtful could be behind someone's back, to their face, through calls or texts. It could be by being nasty through social media, games or other websites. It could be by calling people names, leaving them out, or through sharing photos or videos that upset them. It could be threatening to hurt or actually hurting them. It could be done on purpose or as a joke that goes too far.

Our research showed that a minority of children aged 5-15 were using any of the four Q&A sites/apps we asked about (14%): more likely among the older children aged 12-15 (21%), decreasing to one in ten 5-7s and 8-11s.[64]

Online knowledge and understanding

'Critical understanding' is a core component of media literacy, which enables children to understand, question, and manage their media environment. This is important if they are to get the benefits that the internet and other media can offer and avoid potential risks.

A quarter of 12-15s do not think about the truthfulness of information on newly discovered sites or apps

In 2020, almost half of 8-11s and almost six in ten 12-15s said they had used sites or apps that they hadn't used before. Within this group, one in ten in each age group said they had tried 'lots' of new sites and apps during the year. The younger age group in particular were more likely than in 2019 to use newly discovered sites or apps – which could be due to online home learning, or to finding alternative forms of entertainment online.

We asked the older age group (12-15s) if, when using new sites, they ever considered whether the sites could be trusted, or if they contained true and accurate information. Six in ten of those who had used new sites in 2020 said they did consider it, while a quarter said they didn't.

Among 12-15s who had used newly discovered sites in 2020, similar proportions (around three in ten) conducted the following checks: checking information across a number of sites to be sure it was correct; checking the general look of the site to see how professional it looked; seeing whether it was a company they had heard of; asking someone else if they had used the site; checking how up-to-date the information on the site was.

Children were more critical of information on social media sites and apps compared to school and homework, and news sites and apps

It is important for children to critically evaluate the information they see online. To measure this, we asked children aged 8-15 who went online and who used the following types of sites and apps, how much of the information contained within these sites was true:

- *social media* sites or apps (like Snapchat, Instagram, Facebook, Twitter or YouTube);
- s*chool and homework* sites and apps (like BBC Bitesize or sites suggested by teachers);
- sites or apps about *news and what is going on in the world* (like BBC News, CBBC Newsround, newspaper websites like the Daily Mail or the Guardian, or news sites or apps like HuffPost).

The response of 'some is true' is classed as the most critically aware, compared to 'most is true' and 'all is true'.

[64] Our survey asked about use of the following Anonymous Q&A sites/apps: Yolo, Ask.fm, Tellonym and Piksa.

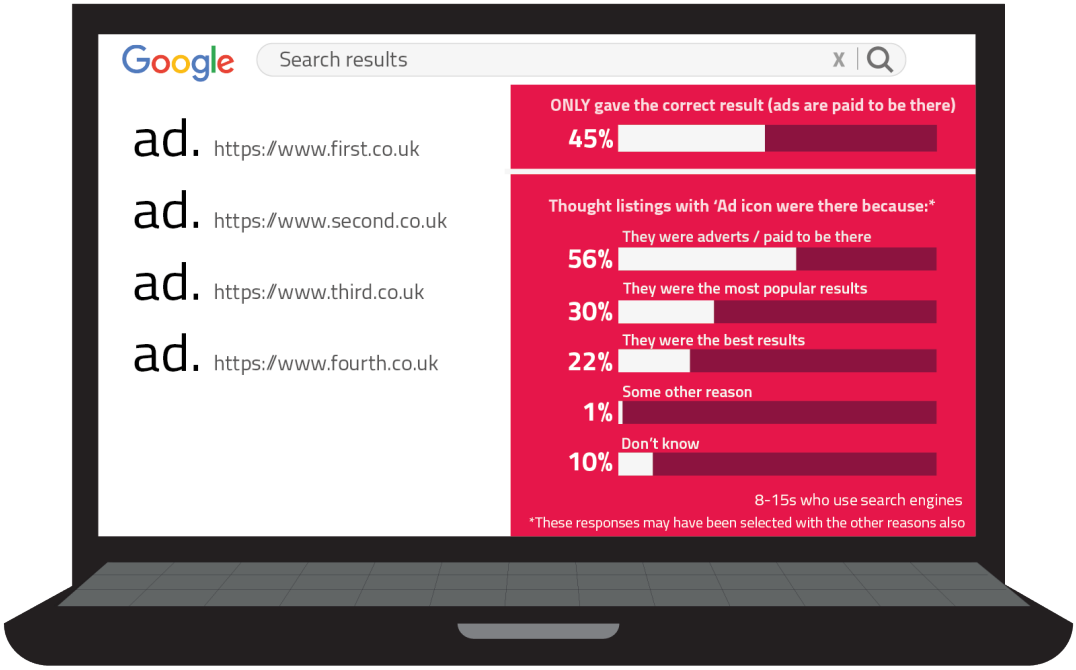
Children who used social media sites and apps were more likely to provide this critically aware response: 57% thought that some of the information on these sites and apps was true, compared to 13% of users of school and homework, and 25% of users of news sites and apps thinking this.

Half of 12-15s recognised advertising on search engines

In 2020, almost nine in ten children aged 5-15 in our study said they ever used search engines; this was more likely among 12-15s (94%) than 8-11s (83%). Just over half of 8-15s, who use these sites, demonstrated critical understanding of the results presented, stating that some of the sites listed could be trusted and some couldn't (54%).[65]

Another element of critical understanding is the ability to detect the placement of sponsored or paid-for advertisements in search engines. Within our survey, children aged 8-15 who went online and used search engines were presented with an image of a Google search for children's trainers, in which the first four results appeared with the word 'Ad'. While more than half recognised that these results would have paid to be there, fewer correctly stated that was the only reason (40% of 8-11s and 49% of 12-15s).[66]

A smaller proportion thought the results were there because they were the most popular (30% of 8-15s) or that they were the best results (22%).



[65] 32% thought that if a site like Google or Bing had listed them then the results could be trusted; 10% did not consider whether or not to trust them

[66] Compared to previous years, the proportions providing the correct response have increased (from 30% to 51% of 8-11s, and from 48% to 60% of 12-15s). However, we believe this could be due to the change in methodology in 2020 to an online survey. Where previously, respondents were shown an example of a search engine listing via a paper showcard (when face-to-face), in the 2020 online survey an image is displayed on-screen, therefore presented in a more realistic setting. As a result, we feel that the 2020 measures may more accurately reflect children's perception of paid-for ads online. An increase of a similar measure was also seen in the adults' survey.

Two-thirds of 12-15s can recognise vlogger sponsorship

More than four in ten children aged 5-15 said they watched vloggers or influencers on video-sharing platforms, with the likelihood increasing with age: from 34% of 5-7s to 49% of 12-15s. In some cases, these vloggers or influencers are paid or sponsored to endorse products or a service. When we asked children aged 12-15 why vloggers or influencers might say good things about products or brands, two-thirds correctly recognised that they might be being paid by the company or brand to promote the product or service (65%).

A third thought that they were saying nice things about the product or service because they either wanted to share the information with their followers, or they thought the product or service was cool or good to use.

The participants in our Children's Media Lives study understood that influencers were paid to promote content. Rather than annoying them, some reported finding this helpful as it showed them things that were in line with their interests. And, Peter, 15, indicated that he understood and accepted that his favourite fitness influencers promoted their own products or products from sponsors. Reflecting on a post by MattDoesFitness in collaboration with MyProtein (a fitness nutrition company) he said:

> "It's his stuff… so I understand he needs to promote it"
>
> *Peter aged 15*

News consumption

Children were more sceptical about the news during the second lockdown than during the first

Our Children's News Consumption Survey asked 12-15 year-olds about their use of, and attitudes towards, news content across different platforms during two periods in the Covid-19 pandemic: April 2020 (during the first lockdown) and November-December 2020 (during the second lockdown). [67]

More than six in ten children aged 12-15 agreed that they found it hard to know what was true and what was false about Covid-19 during the second lockdown (November-December 2020) - a higher proportion than had felt this during the first lockdown (April 2020: 52%).

Just over half of 12-15s agreed during the second lockdown that there was too much in the news about the Covid-19 pandemic – up from 43% in April. But overall, more than nine in ten said they had accessed news and information about Covid-19 in 2020; albeit with a slightly smaller proportion doing so in November-December (93%) than during April (96%).

As the year went on, 12-15s used on average fewer news sources than they had earlier in the Covid-19 pandemic (3.7 in November-December, compared to 4.5 in April). Friends and family became the most-used sources for news and information about Covid-19, although this decreased from 67% in April to 56% in November-December 2020. Lower proportions also said they used BBC TV (27% in

[67] Covid-19 news and information: consumption and attitudes - Ofcom

November-December compared to 49% in April) and ITV (used by 17% in November-December compared to 30% in April).

'School or teacher' was the only source to see an increase in use – from 17% in April to 37% in November-December. This increase is understandable; during April[68] the majority of children were home learning[69], whereas during November-December only those who were self-isolating stayed at home.

This chimes with the findings from our Life in Lockdown and more recent Children's Media Lives study. Following a peak in interest at the beginning of the pandemic, in 2021 nearly all the participants had reverted to being disengaged with TV and radio news. In most cases the news the children heard was consumed passively; sometimes from a parent but more often via social media – for example, through Snapchat's explore feed or viral videos on TikTok. Moreover, most of the children in the study did not appear to question whether what they saw via these feeds was true or accurate, and when asked, some struggled to reflect on how they would do this.

Freya, 17, tended to look for a quantity of corroborating sources rather than questioning the quality, and was reassured if she could find several articles referencing a topic she had seen discussed in a TikTok video. Zak, 11, relied on his mum to help him understand what he should and should not believe:

> "I don't really watch the news much, I just hear it from my mum, and she will know if the news is real or fake, so I just listen to what she says"
>
> *Zak aged 11*

Staying safe online

More than half of 12-15s said they had experienced some form of negative online experience

To measure the levels of any negative online experiences among children, we gave children aged 8-15 the option of answering questions about problems they might have experienced when using mobile phones or when online. Among the 12-15 year olds who opted to answer these questions[70], 55% said they had experienced some form of negative online experience, from a list they were prompted with.

Among these negative experiences, the most likely to be cited was "*being contacted by a stranger online who wanted to be their friend"* (30%). However, three-quarters of 12-15s knew how to block messages on social media from someone they didn't want to hear from; more than half had done this (55%).

[68] The fieldwork period overlapped with the Easter holidays, when children may not have been home learning.

[69] Except key workers' and vulnerable children, who attended school premises where possible.

[70] Nine in ten 12-15 year-olds agreed to answer these questions. 8-11s were not asked all of the questions about the problems they might have experienced when using mobile phones or when online.

About a fifth of 12-15s said they had accidentally spent money online that they didn't mean to, or seen or received something scary/troubling, or seen something of a sexual nature that made them feel uncomfortable.

Although there were no significant differences in the individual experiences compared to 2019, the overall proportion claiming to have experienced any of these (55%) was larger than reported in our 2019 study, which could be due to various factors including methodological changes and increased time online due to the Covid-19 pandemic.

Awareness of reporting functions was high, but only a minority of 12-15s have ever reported content

On seeing worrying or upsetting content online, children have the option of reporting this direct to the platform, using the reporting function available on many sites, apps and games.[71]

Overall, seven in ten children aged 12-15 were aware of reporting functions. Fourteen per cent said they had ever reported something they had seen online, while a smaller proportion (9%) said they had seen something that worried them but hadn't reported it, despite being aware of the reporting function.

Just under one in ten 12-15s said they often saw 'hateful content' online

For the purposes of our survey, we described 'hateful content' as anything that had been directed at a particular group of people based on, for instance, their gender, religion, disability, sexuality, or gender identity. Overall, half of 12-15s said they had encountered this type of content online in the past year[72], with 8% saying that they had seen it often.

Children had adopted different strategies for dealing with hateful content. Six in ten 12-15 year-olds said they had taken some action on seeing it. But some, depending on their actions, might have inadvertently shared the content further. Around a fifth said they had responded to the post/video/comment by 'disliking' it or commented on it to say they thought it was wrong, or shared it with their friends, saying it was wrong. Doing this brings the risk that their action will appear in their own social media feed, which is then seen by others, inadvertently further sharing the content.

Meanwhile, 25% chose to block the person who shared or made the comments, while 22% reported it to the website.

Although girls aged 12-15 were more likely than boys to inadvertently share the content by disliking the post/comment/video (27% vs. 13%), they were also more likely than boys to take constructive action in reporting the content to the website (33% vs. 10%).

[71] A reporting function can be in the form of a button, link, email address or online form through which the user can point out the worrying content or report the person who posted or forwarded the content.

[72] As fieldwork for this research was conducted October 2020-January 2021, children's recollection will be based on the year before that.

Almost all children have received online safety advice and said they would tell someone if they saw something worrying online

Another way for children to deal with seeing worrying or nasty content online is to tell someone about it. Nine in ten children aged 8-15 who went online said they would tell someone, with six in ten saying they would *always* tell someone. A minority said they would not tell anyone (4%) or were unsure if they would (5%).

Overall, among those who would tell someone, telling a parent was the clear overriding choice, stated by nine in ten 8-15s. Friends, brothers and sisters, or teachers were next in line – although by a much smaller proportion; about three in ten children. However, this is where we see differences by age; older children were more likely than the younger ones to tell a friend (41% of 12-15s, compared to 25% of 8-11s), whereas the younger were more likely to tell a teacher (36% of 8-11s, compared to 20% of 12-15s).

Almost all children aged 8-15 who went online said they had received some sort of information or advice about online safety. Among the older children, aged 12-15, comparable proportions had received this from either a parent or teacher (around eight in ten); while those aged 8-11 were more likely to have had advice from their parent (87% vs. 80% teacher).

Parental attitudes and mediation strategies

Parents found it harder to control their child's screen time during the Covid-19 pandemic…

Our research showed that six in ten parents of 5-15s felt that their child had a good balance between screen time and doing other things. Parents of older children were less likely to agree (51% of parents of 12-15s) than parents of younger children (70% of parents of 5-7s).

However, fewer parents overall than in 2019 felt their child had a good balance – probably a consequence of children's increased reliance on being online for home learning and entertainment in 2020.

In line with this, four in ten parents of 5-15s found it hard to control their child's screen time. Parents of both 5-7s (32%) and 8-11s (45%) were more likely to feel this than in 2019.

This is perhaps unsurprising given that the children in the most recent wave of our Children's Media Lives study were spending a large portion of their time online. Many of the activities that they might previously have done in person (for at least part of the time) – socialising, entertainment, learning and exploring the world – were almost entirely being done online.

…and were more concerned than before about nearly all aspects of their child's online use

We asked parents how concerned they were about nine aspects of their child's online use. Compared to 2019, parents of children who went online were more likely to be concerned about seven of these – driven mainly by the parents of younger children aged 5-7.

The most common concerns were about: companies collecting information about what their child does online (57%); their child seeing content that might encourage them to hurt or harm themselves (54%); their child being bullied online (54%); and how much time their child spends online (53%). Half of parents were concerned about their child giving out details to inappropriate people and

online content, with just under half concerned about the pressure on their child to spend money online.

Higher proportions of parents in Northern Ireland had concerns and rules about some aspects of their child's online use, than parents in the other UK nations

Concerns

Parents in both England (77%) and Wales (80%) were more likely than those in Northern Ireland (69%) to agree that they felt they knew enough to help keep their child safe online (parents in Scotland were comparable to the other nations, at 76%). And parents in Northern Ireland were more likely to have concerns about certain aspects of their child's online use, such as:

- their child being bullied (64%, compared to 53% of parents in England);
- their child damaging their reputation, whether now or in the future (51% vs. 42% in England);
- their child seeing content which might encourage them to hurt or harm themselves (66% vs. 53% England and 55% Scotland).

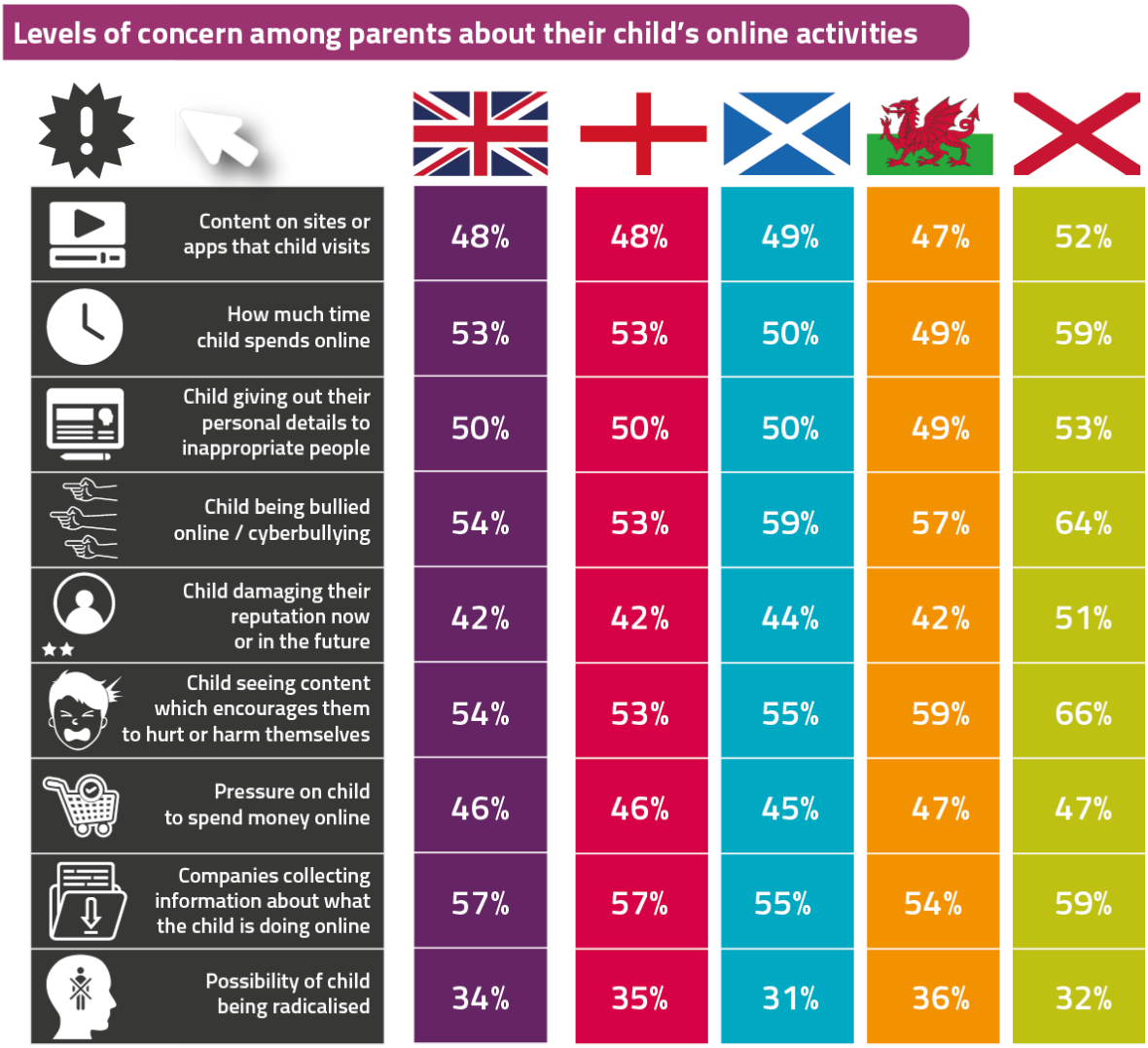
However, one concern showed a different picture: the pressure on their child to spend money online. Parents in Northern Ireland were the most likely to be 'not very' concerned about this (28%), compared to England (19%), Wales (18%) and the UK average (19%).

Rules

These higher levels of concern among parents in Northern Ireland may explain why they were also more likely to have certain rules in place for their children's online activities – in particular, compared to parents in Wales.

Parents in Northern Ireland were more likely to have rules in place for:

- who their child could contact when online (72% vs. 61% in Wales);
- the information that their child could share online (66% vs. 54% in Wales);
- when their child could go online (54% vs. 42% in Wales).



Parents recognised the value of the internet in helping their child stay connected with their friends during the Covid-19 pandemic

Although some parents found it hard to control their child's screen time in 2020, half of parents whose child went online felt that the benefits of the internet for their child outweighed any risks.[73] [74]

When considering specific benefits, 80% felt that being online helped their child with their schoolwork or homework, more than six in ten thought it helped their child learn a new skill or develop creative skills, and 47% thought it helped their child to build or maintain friendships.

Parents were more likely in 2020 to think that being online helped their child build and maintain friendships. The proportions thinking this increased with the age of the child – from 20% of parents of 5-7s to 64% of parents of 12-15s. With the lockdowns and restrictions meaning many children

[73] Just under two in ten parents disagreed (18%), while 31% were unsure – a small increase since 2019.

[74] Views from parents in the nations: Overall, parents in the nations were equally likely to feel that the benefits of the internet outweighed the risks for their child. Parents in Wales were more likely to strongly agree with this (23%) than those in either Scotland (14%) or Northern Ireland (12%).

could not see their friends face to face, these findings demonstrated the value that parents placed on the internet for facilitating their children's friendships.

And this was echoed by the older children (12-15 year-olds); generally, attitudes towards the benefits of being online are similar among 12-15s and their parents. However, they were more likely than their parents to feel that being online helped them to build or maintain friendships (72% vs. 64%) – again, exhibiting their reliance on this medium to connect with their friends during the Covid-19 pandemic.

Nearly all parents of children who went online adopted some form of mediation of their child's online use

More than three-quarters of parents of children aged 5-15 who went online felt they knew enough to help keep their child safe when online.

The vast majority of parents with children who went online adopted some form of mediation of their child's online use (98%) – whether technical or in person. A minority of parents had no mediation in place at all (2%), more likely among parents of 12-15s (5%).

Overall, half of parents of 5-15s who went online adopted *all four* of the mediation types we specified in our survey[75]. A further three in ten said they had three of the four types in place, 12% had two, and 6% had one mediation type in place. Below, we look further into the various types of mediation adopted (or not) by parents.

Awareness of technical tools and controls among parents was high, but only a minority used them

While around six in ten parents of 5-15s, who had fixed broadband at home and a child who went online, were aware of certain technical tools and controls, around half of these actually used the tools and controls available.

More than six in ten said they were aware of either *content filters by the ISPs*[76] (61%) or *content filters via parental control software*[77] (66%), but just 35% and 29% respectively said they actually used them. For parents of the older children, aged 12-15, this might be partly due to the fact that 16% of this age group said they knew how to bypass the controls designed to stop them visiting certain sites.

Almost six in ten were aware of *parental controls built into the device by the manufacturer*; 32% said they used them.[78]

[75] Within our survey we asked about: *supervising their child*, *having rules in place*, *technical controls*, or *talking to their child about online safety*.

[76] Content filters provided by ISPs where the filters apply to all devices using the home broadband service (also known as home network filtering).

[77] Parental control software set up on a particular device used to go online, such as Net Nanny, McAfee Family Protection, Open DNS FamilyShield.

[78] Parental controls built into the device by the manufacturer, such as Windows, Apple, Xbox, PlayStation, etc

Half were aware of technical controls that allowed them to *restrict access to inappropriate online content*, for example Google SafeSearch, YouTube Restricted Mode, or TikTok Family Safety Mode[79]; but again, just three in ten had adopted them to manage their child's online use.

Among parents of children who used smartphones or tablets, more than half were aware that settings could be changed on the device to *stop apps being downloaded* or to *stop in-app purchases* , while a third said they had used these settings.[80] Just under half were aware of parental control software, setting or apps that could be used on a phone or tablet to restrict access to content and manage use of the device, and a quarter said they used these.

Half of parents talked to their child about online safety every few weeks

Talking to children about online safety is another key mediation strategy, and nine in ten parents of children who went online said they had ever done this. Within this group, half talked to their child at least every few weeks; this was more likely among parents of the younger children aged 5-7 and 8-11, than among parents of 12-15s. A further three in ten spoke to their child every few months, comparable between each age group. Fewer than one in five said they did it less often than this but had done so more than once.

Parents also sought or had received advice about online safety; the child's school was the most-used source of information or advice for this (used by two-thirds of parents of children who went online), followed by family and friends (31%). Around a fifth used websites, ISPs, government or local authorities, and the same proportion asked their child.

Supervising their child was another mode of mediation, adopted by nine in ten parents of children who went online. The most likely way was to do this was by asking the child what they were or had been doing online (59%), followed by being nearby and regularly checking what the child was doing (52%), or checking the browser or device history (33%). However, four in ten 12-15s said they knew how to delete the history from sites they had visited, or to use 'incognito' or privacy mode.[81]

A fifth of parents said they sat with their child and watched what they were doing online, or helped them while online, although the proportion doing this had decreased since 2019. This may be due to the increase in children's online use in 2020 and the increased demands on parents' time, such as managing home learning.

[79] Google Safe Search: Safe Search for Kids - Internet Filtering by Google | Kid Safe (safesearchkids.com); YouTube Restricted Mode: How to turn Restricted Mode on and off - YouTube; TikTok Family Safety Mode: Introducing Family Safety Mode and Screentime Management in Feed | TikTok Newsroom.

[80] Prior to 2020, this question was split into two, therefore trend cannot be reported on.

[81] Incognito mode hides the browsing history on a device so others cannot see the sites a user has visited, but it does not stop others, such as advertisers, knowing which sites have been visited.

Sources of online safety varied among parents across the UK nations

Parents in both England (85%) and Northern Ireland (88%) were more likely than parents in Wales (78%) to seek information or advice from others on how to keep their child safe online.

And where they went for advice differed too. Online safety advice from the child's school was more likely to be used by parents in England (68%) and Northern Ireland (70%) than by parents in Scotland (56%) or Wales (52%). Parents in Northern Ireland were more likely than those in England to seek advice from sites and apps (31% vs. 22%).

The government and local authorities were the sources most likely to be used by parents in both Scotland and Northern Ireland (23% each), compared to 14% of parents in Wales (and 20% of parents in England). Parents in England were more likely than parents in Wales to use the BBC as a source (17% vs. 11%) but were comparable to those in Scotland (14%) and Northern Ireland (17%).

There were no differences by nation in the proportions of parents talking to their children about online safety or supervising their online use in any way.

Parents felt the need to relax some of the rules about their child's online use during the Covid-19 pandemic

Overall, more than nine in ten parents of children who went online had one or more rules in place about their child's online use – higher than in 2019. But, in 2020, half agreed with the statement *"As a result of my child being at home more than usual, I have had to relax some of the rules about what my child does online",* with 15% (more often parents of boys than girls) strongly agreeing with this.

Although three in ten said they did not feel they had to relax their rules, this was more likely among parents of the younger age group of 5-7s than among parents of 8-11s or 12-15s.

This echoes some of the findings from our Life in Lockdown study, where several parents talked about relaxing some of their normal rules around routines and online activities, in recognition that lockdown was a difficult experience for their children.

For example, 12-year-old Ben's mum said:

> "If my child does their five pieces of schoolwork each day, then do you know what? If they stay up a bit late, and they watch a bit of TV and they do a bit more gaming, then we're not going to kill ourselves"
>
> *Ben's (aged 12) mum*

In addition, 15-year-old Shriya's mum was worried she would affect her daughter's wellbeing negatively if she imposed too many rules, as she knew her children were not maintaining the social contact they would usually have with their friends:

> "I am giving them more space because I don't know how else to deal with it without her feeling agitated or upset"
>
> *Shriya's (aged 15) mum*

Vulnerable children

Children and young people can be vulnerable due to a variety of factors, and because vulnerability is about circumstances, it can change over time. Our research provides us with data on two groups of children who may be considered to be vulnerable, and how their vulnerability may influence their media use, attitudes and understanding. These two groups are children who:

- had a **health issue, condition or disability which impacted or limited their daily activities** (named as having an 'impacting/limiting condition' throughout this section); and/or
- were in households considered to be **most financially vulnerable** (named 'MFV' throughout this section).

There are overlaps between these groups, but for clarity, and because there are different themes in their attitudes and experiences, we have kept them separate within our findings.

We note that this research has not been specifically designed to provide robust analysis on vulnerable children of any specific category. However, following analysis of the data and the response rates to existing survey questions, we are confident that we can provide insight into these two categories.

Children with an impacting or limiting condition

Almost one in five children in each of our surveys had any impacting or limiting condition

In both of the surveys for our Children's and Parents' Media Literacy Tracker[82] we asked parents to state whether their child had any impairment or condition that impacted or limited their daily activities. Parents were given a list of conditions to choose from, grouped into social/behavioural, mental abilities, mental health, mobility, dexterity, eyesight, hearing, breathing, or other. Therefore, sample sizes in this category were purely determined by the perception of the parent.[83]

Based on this definition, children across the UK with any of these conditions in our sample represented almost one in five 5-15s within both surveys[84], with a smaller proportion for 3-4s[85]

[82] As mentioned in the introduction to the report, the 2020 survey was split into two (Survey 1 and Survey 2) to accommodate moving to online methodologies.

[83] The full list of codes can be found in the Annex: https://www.ofcom.org.uk/__data/assets/pdf_file/0023/217823/children-and-parents-media-use-and-attitudes-annex-2020-21.pdf

[84] Survey 1 – 18%, Survey 2 – 19%; weighting was not applied on this question which is why the surveys are not exactly equal.

[85] Some types of conditions are not as apparent or diagnosed at an earlier age (for example, mental health conditions) and so this may explain the difference in prevalence between the age groups.

(11%-13%[86]). The change in the data collection method in 2020 resulted in a different way of questioning in this area, so it is not possible to directly compare the incidence or analysis year on year.[87]

	Survey 1	Survey 2
Proportion of children with an impacting or limiting condition which affected their daily activities	**18%**	**19%**
Proportion of children with no condition	74%	75%
Proportion who preferred not to say, or did not know	8%	6%

For this analysis we have compared (where relevant) the data for children aged 5-15 with an impacting/limiting condition, to those without; that is, those who were not reported as having any conditions.[88] We have only reported where there were statistically significant differences.

Children with an impacting or limiting condition:

… were more likely to own their own laptop or desktop computer

Children aged 5-15 with an impacting/limiting condition were more likely than those without to personally own a laptop or desktop (46% vs. 37%) or smart TV (33% vs. 24%). However, there were no differences in overall use or availability in the household.

… were less likely to feel represented on TV

Children aged 8-15 with an impacting/limiting condition were less likely than those without to feel represented in TV programmes. Although half felt that there were enough programmes showing children who looked like them, this was lower than the proportion of children without a condition who felt this (64%).

A majority (59%) felt there were enough programmes for children their age, but this was, again, lower than the proportion of children without a condition agreeing with this (75%). Three in ten disagreed (31%), while 10% were unsure.

… may be at more risk of online harms

Seven in ten children aged 12-15 with an impacting/limiting condition[89] claimed to have experienced at least one of the negative experiences listed in our survey, compared to half of those without a condition. In particular, they were more likely to have been contacted online by someone they didn't

[86] Survey 1 – 11%, Survey 2 – 13%, weighting was not applied on this question, which is why the surveys are not exactly equal.

[87] The Department of Education (DfE) published a report in July 2020 stating that 15.4% of children in schools in England received some kind of SEN support (special educational needs) either on the register or through an ECHP (education, health and care plan), which compares reasonably to our figure of 18% across the UK: Special educational needs in England, Academic Year 2019/20 – Explore education statistics – GOV.UK (explore-education-statistics.service.gov.uk)

[88] The comparison does not include children whose parents were unable or preferred not to say if their child had a listed impact/ limit to their daily activities.

[89] Who opted to answer the questions about problems they may encounter when using mobile phones or being online.

know who wanted to be their friend (45% vs. 27%), and to feel under pressure to send photos or other information about themselves to someone (14% vs. 4%).

Children aged 8-15 with an impacting/limiting condition were more likely to say that they had experienced some form of bullying (46% vs. 26% without).[90] The most common form of bullying for children with an impacting/limiting condition was face to face (65%), but there were also several services where this happened: social media (46%), text or messaging apps (45%), online games (40%), video calls (9%), and other sites/apps (8%). All of these instances were comparable to children without a condition.

More children aged 8-15 with an impacting/limiting condition, who used social media or messaging sites and apps, than those without a condition, had difficulties managing certain aspects of social media. While they were as likely as those without a condition to feel the pressure to be popular on social media apps or sites (85%), almost all children with an impacting/limiting condition (99%) felt that people can be mean or unkind to each other on these sorts of sites and apps (compared to 92% of those without).

… were more likely to use the internet to connect with and support friends and family

More than eight in ten children who had an impacting/limiting condition used video calls such as Zoom, HouseParty and Skype (84%), a higher proportion than those without a condition (75%). Almost six in ten of this group of children who used social media and messaging apps said they had sent supportive messages, comments, or posts to friends via these sites and apps, if they thought their friend was having a hard time, compared to 45% of those without a condition.[91]

Parents of children with an impacting or limiting condition found some aspects of the online environment more concerning and found management of screen time more of an issue

Parents' views of the internet, in terms of the risks, benefits and concerns relating to their child with an impacting/limiting condition, were often similar to those of other parents. However, a greater proportion of parents of children with a condition were concerned about their child seeing self-harm content (62% vs. 52%) or possibly being radicalised (41% vs. 32%).

Screen time was more likely to be a concern for parents of children with an impacting/limiting condition. One in five agreed 'a lot' with the statement "*I find it hard to control my child's screen time*", compared to 12% without. This differential perhaps explains why parents with children with a condition were less likely than other parents to agree that their child had a good balance between screen time and other activities (49% vs. 62%).

[90] The survey question specified: 'People can be nasty or hurtful. It could be behind someone's back, to their face, through calls or texts. It could be by being nasty through social media, games or other websites. It could be by calling people names, leaving them out, or through sharing photos or videos that upset them. It could be threatening to hurt or actually hurting them. It could be done on purpose or as a joke that goes too far. Has this ever happened to you?'

[91] Overall, children aged 12-15 are more likely to use social media or messaging apps/ sites for this purpose and they are better represented in the 'impacting/limiting condition' sample compared to those without, which could explain some of this difference.

This was also echoed by the children themselves. Of those aged 12-15 who had an impacting/limiting condition, 42% agreed that they had a good balance between screen time and doing other things, compared to 62% of 12-15s who did not.

Parental application of rules and supervision of children with an impacting/limiting condition was very similar to that of other parents

In general, parents had similar levels of rules around broadcast TV, internet, gaming, and mobile, and feelings of having to relax online rules during the Covid-19 pandemic. The only exception was that fewer parents of children with an impacting/limiting condition said they had rules around when their child could play games (43% vs. 53% without). There were also few differences in the approach taken in terms of parental mediation, whether via technical controls or in person. The exception here was in terms of supervision: parents of children with an impacting/limiting condition were less likely to 'be nearby and check what [the child] did' (43% vs. 55% without a condition).

Children in financially vulnerable households

Financial vulnerability is a measure that has been devised by Ofcom to better understand the impact of income and household composition on ownership and use of communications services. The analysis creates three distinct household types by combining household income and the size of the household (including the number of children): most financially vulnerable (MFV), potentially financially vulnerable (PFV) and least financially vulnerable (LFV).[92] These categories are, in part, created from the household income question – asked within both of the children's media literacy surveys.[93] Further details about how it is calculated and used can be found in the accompanying Annex.[94]

This section of the report looks at the differences between those children who are 'most financially vulnerable' (MFV) and where relevant, compares them to those categorised as 'least financially vulnerable' (LFV). We have only reported where there were statistically significant differences. Around one in three were in the MFV category, and one in five or less in the LFV category, although there were small variations between the surveys. The remainder were classified as 'potentially financially vulnerable'. The proportions within each category are shown in the following table.

[92] Proportions of parents and children included in this section are based on those who agreed to answer the household income question: 83% in survey 1 and 90% in survey 2 answered the household income question.

[93] As mentioned in the introduction to the report, the 2020 survey was split into two (Survey 1 and Survey 2) to accommodate moving to online methodologies.

[94] Annex: https://www.ofcom.org.uk/__data/assets/pdf_file/0023/217823/children-and-parents-media-use-and-attitudes-annex-2020-21.pdf

	Survey 1	Survey 2
Proportion of children in 'most financially vulnerable' households (MFV)	**28%**	**32%**
Proportion of children in 'potentially financially vulnerable' households (PFV)	35%	43%
Proportion of children in 'least financially vulnerable' households (LFV)	20%	15%
Proportion that preferred not to say (that is, did not answer the household income question), or did not know	17%	10%

Children in MFV households were less likely than those in LFV households to have access to a laptop or desktop

Access to digital devices was a prominent issue in 2020 due to home schooling, which almost always had an online element.[95] Children in MFV households were less likely to have access to a desktop or laptop during 2020 than those in LFV households (89% vs. 98%). The incidence of using these devices to go online was also lower for the MFV group (76% vs. 86% LFV). Perhaps most relevant to home schooling, 21% of those in MFV households only used a device other than a desktop or laptop to go online, compared to 12% of the LFV group.

Financially vulnerable children were less likely to explore the online world

Children aged 8-15 in MFV households who went online were more likely to only visit sites or apps that they had used before (51% vs. 39% LFV); and were less likely to visit new sites or apps (47% vs. 59% LFV).

This group were also less likely to visit sites or apps about news or what is going on in the world than those in LFV households (41% vs. 57%). Yet among users of news sites and apps, they were as likely to give the critically aware response, as LFV children, with regards to the truthfulness of the information on these (30% thought that *some* of the information on these sites and apps was true, comparable to 22% LFV).[96]

Children aged 8-15 who went online in MFV households were as likely as the LFV group to visit social media or school and homework sites, and to assess that some of the information on them was true.

Although taking part in at least one of the social media or messaging chat activities listed in the survey was near-universal, MFV children who used social media or messaging sites and apps were less likely to 'follow brands or companies' (23% vs. 35%), or to share and discuss news stories (17% vs. 31%).

In 2020 children in MFV households were less likely than their LFV peers (72% vs. 85%) to use video calling to stay in touch with people, in particular to call their friends or teachers. Three-quarters of

[95] Fieldwork was timed during a period when for the most part, children were at school; however, it seems likely that access would not have substantially changed in such a short period of time.
[96] The apparent percentage point difference is not statistically significant.

LFV children used this platform for calling their friends compared to just over half of MFV children. And a quarter of LFV children made a video call to a teacher, compared to 16% of the MFV group.

Some aspects of the online environment were more concerning for parents in financially vulnerable households

Parents of children aged 5-15 who went online and were in MFV households were less likely to agree that the overall benefits of the internet outweighed any risks for their child (47% vs. 64% LFV). Smaller proportions agreed with two specific benefits: 43% felt that the internet helped their child to build and maintain friendships, compared to 55% of the LFV group; and 27% agreed that it helped their child to find out about the news (compared to 39% of the LFV group).

Our research showed that parents of children who went online had varying levels of concern about their child's online use. For those in the MFV group, two risks were more concerning than for those in the LFV group: exposure to self-harm content (55% vs. 45%), and the possibility of radicalisation (38% vs. 29%). These were the same two concerns seen among parents of children with an impacting or limiting condition.

Financially vulnerable children were less likely to have rules in place for their media device activities

Children in MFV households were less likely than those in LFV households to have rules, imposed by their parents, about when they could do certain activities. Among those who watched broadcast TV, fewer had a rule about when they could watch TV (42% vs. 65%). Among those who went online, 40% had a rule about when they could go online (vs. 58% for LFV). And among those who played games, 44% had a rule about when they could play games (vs. 58% LFV).

They were also less likely to have rules about how much time they could spend playing games (50% vs. 63%) and watching TV (38% vs. 56%).

When considering rules around their child's online activities, parents in LFV households were more likely than those in MFV households to feel that they had to relax their rules about online use during the Covid-19 pandemic (57% vs. 46%).

The media world of pre-schoolers

3-4 year olds

48% have their own tablet and 4% their own smartphone

To go online - **67%** use a tablet, **35%** a smartphone, and **30%** a laptop

To watch TV - **84%** use a TV set, **70%** a tablet,and **42%** a mobile phone

47% watch live broadcast TV, **90%** watch video-on-demand content*

23% play games online

18% use social media apps/sites

20% use messaging apps/sites

92% use video-sharing platforms (VSP)

24% use live streaming apps/sites

* Video-on-demand content includes subscription services such as Netflix, broadcast catch-up services such as BBC iPlayer, recorded TV, websites like Vimeo and YouTube, blu-rays/DVDs, and renting online such as from Google Play Store

Children aged 3-4 may be either at pre-school (nursery) or in reception year, so entering the world of more formal (albeit mostly play-based) learning.[97] As this is a distinct and important developmental stage for children, we have, this year, devoted a section of this report to them: their use of devices, online behaviour, TV viewing, and gaming consumption.[98]

Pre-schoolers have an increasingly online-based world

Just over eight in ten children aged 3-4 went online in 2020 (82%). Tablets were the key device for pre-schoolers: two thirds of 3-4 year-olds used them to go online (67%), while around half owned one themselves (48%).

Around a third used a laptop or mobile to go online (30% and 35% respectively), although ownership was much lower for this age group; 6% of parents claimed that their pre-schooler owned their own desktop or laptop.

[97] Children aged 3-4 are starting education in the Early Years Foundation Stage – the first key stage of education

[98] Parents of 3-4 year-olds, as with 5-7s, were asked about their child's access, use and behaviours. The children themselves were not interviewed until they reached the age of 8.

Pre-schoolers, like older children, are moving away from live TV towards video-on-demand (VoD)

TV consumption for 3-4 year-olds is no longer just about sitting in front of a TV set. While more than eight in ten in our survey used a TV set, the same proportion used a device other than a TV set to watch TV content; the most likely being a tablet (70%).

Although their choice of content may be different, the way pre-schoolers watched TV had the same pattern as for older children, with VoD more commonly used than live broadcast TV (95% vs. 47%). This illustrates the range of age programming that these services provide and shows the effect of access to devices such as tablets, which more easily enable on-demand viewing.

More than nine in ten pre-schoolers used video-sharing platforms (VSPs), mostly for watching cartoons

The vast majority (91%) of pre-schoolers used VSPs to watch video content in 2020. As with older children, YouTube was most commonly used to watch content - among 86% of pre-schoolers; TikTok was the second most-used platform, at a distant 15%.

Pre-schoolers were predominantly content consumers, rather than generators, although a quarter of parents claimed that their child used VSPs to post or share videos online[99], most likely on YouTube (17%).

While high proportions of both pre-schoolers and older children watched content on VSPs, their content preferences differed. Eight in ten pre-schoolers used VSPs to watch cartoons/ animations/ mini-movies or songs, while children aged 5-15 were more likely to enjoy funny videos, jokes, and prank challenges (80%). However, some pre-schoolers were using videos to help with learning (25%)[100] or 'how to' videos related to hobbies and interests (19%).

YouTube Kids was in the mix for a majority of pre-schoolers (72%), and 43% of parents stated that their child only used the YouTube Kids app, while a quarter used both the main YouTube site and app and YouTube Kids.

Online gaming was not as prevalent among pre-schoolers, but parental rules around online gaming were

A minority of pre-schoolers played games online (23%), and unlike for other age groups, this did not increase in 2020. A fifth of pre-school gamers played with or against someone else they knew or had met in person; and it was unusual for them to play with or against people that they did not know or had not met in person (4%).

In 2020, more than nine in ten parents of pre-schoolers had some rules in place for their child's gaming - an increase since 2019. They were most likely to have rules about their child playing games

[99] One explanation for this may be that parents viewed their own posting of the child's content or videos of the child themselves as the child's use of VSPs for posting content.

[100] Our survey asked parents about their children's viewing of various content, one being 'videos that help with school/ homework' which we have interpreted for pre-schoolers as learning.

with an age-appropriate rating (68%), with appropriate content (65%), and about how much time their child spent playing games (50%).

Three in ten parents of pre-schoolers found it hard to control their child's screen time

Although screens have had to replace many activities during 2020, three-quarters of parents of pre-schoolers felt that their child had a '*good balance between screen time and doing other things*' – higher than the proportion of parents of children aged 5-15 (59%).

However, three in ten agreed that they "*find it hard to control my child's screen time*", yet this was lower than four in ten parents of 5-15s feeling this.

Rules over the amount of time spent on media activities were in place for most, but not all, pre-schoolers: time spent online (66% of those who went online), gaming (60% of those who played games), and watching broadcast TV (63% of those who watched broadcast TV).

About six in ten parents of pre-schoolers who did each activity had rules in place about when they could do each of them.

Just under half of parents of pre-schoolers felt that the benefits of the internet outweighed the risks for their pre-schooler

In 2020, 45% of parents of pre-schoolers who go online felt that "*the benefits of the internet for my child outweigh any risks*". A minority disagreed (22%) while a third were unsure.

However, more than two in five parents whose 3-4 year-old went online identified two specific benefits of their child being online: to learn a new skill, and to develop creative skills. This was similar to other age groups, but where they differed, as a cohort, was that fewer saw a benefit for building and maintaining friendships (13% vs. 47% for 5-15s). Other than schoolwork, which more parents of 5-7s considered to be a benefit (all are school age in this cohort), parental perception of online benefits for 3-4s was very similar to 5-7 year-olds.

Key concerns for parents of 3-4 year-olds were exposure to self-harm content (52%) and companies collecting information about what their child was doing online (50%).

Most parents of pre-schoolers felt they could keep their child safe online, but methods may have slightly changed

Almost eight in ten parents of 3-4 year-olds who went online felt they knew enough to help their child stay safe online – similar to the proportions of parents of older children. However, probably due to their child's age, they were less likely to talk to their child about online safety: half said they had never done so compared to 10% of parents of 5-15s.

The frequency in which they did so was also less than among parents of older children. Almost three in ten said they spoke to their 3-4 year-old about how to stay safe online at least every few weeks, compared to almost half of parents of 5-15s. And just over one in ten did so at least every few months, compared to more than a quarter of parents of 5-15s.

Almost all parents of 3-4 year-olds who went online had some form of supervision in place (99%). But parents of 3-4s were three times as likely to employ direct supervision (sitting beside their child

and watching or helping them while online) compared to parents of 5-15s (59% vs. 21%).[101] Seven in ten said they stayed nearby and regularly checked what their child was doing online (compared to half of parents of 5-15s).

The lockdown restrictions have affected the behaviour of parents of 3-4 year-olds, as well as parents of older children. Almost half of parents of 3-4s who went online said they had had to relax some of their rules about what their child did online during 2020.

[101] The proportions of parents applying direct supervision in this way decreased with the age of the child: 59% of parents of 3-4s, 41% of parents of 5-7s, 19% of parents of 8-11s, and 9% of parents of 12-15s.

In summary

This research provides an insight into the media use and attitudes of children today. These children, and everyone around them, have faced unprecedented disruption to normal life in the wake of the Covid-19 pandemic. Children's reliance on the internet and devices during this time was evident; for home learning, entertainment and keeping in touch with family and friends.

Our research showed nearly all UK households with school-age children had internet access in the home; however, a small minority relied on smartphone only internet access. Furthermore, a substantial minority did not have access to an adequate device for online home learning all of the time, and most of these said they managed this by sharing a device with others.

Children also relied on media for their entertainment during 2020. Use of video-sharing platforms was almost ubiquitous: mainly for watching content, but for a minority for posting and sharing content too. Meanwhile, the proportion of children watching on-demand content was almost double that who watched live TV.

A variety of platforms were used by children to connect to friends and the outside world during the pandemic. Social media, messaging apps and video calling were used by a majority; with online gaming being another popular platform – used by boys in particular - for connecting with friends.

Alongside all the benefits of being online, comes the potential for negative experiences. Just over half of 12-15s claimed to have some form of negative experience online. And, while awareness of reporting functions on platforms was high, only a minority chose to use them.

Parents also felt the impact of the increased reliance on the internet and devices during 2020. While nearly all parents mediated their child's online use in some way, some felt the need to relax the rules about their child's online activities during the pandemic.

But parents also recognised the benefits that being online can bring children; not only did they continue to appreciate how it helps with their school and homework, but many also realised the value of the internet in helping their child stay connected to their friends.

This report forms part of our wider programme of work, Making Sense of Media (MSOM), which aims to help improve the online skills, knowledge and understanding of UK adults and children. We do this through cutting-edge research, and by bringing together organisations and individuals with expertise in media literacy to share ideas and to support their activities.

To find out more about our Making Sense of Media programme and for details on how to join our network, please go to https://www.ofcom.org.uk/making-sense-of-media

For more information on MSOM, and Ofcom's other media literacy research, please visit: https://www.ofcom.org.uk/research-and-data/media-literacy-research/publications