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Children and parents: Media **use** and **attitudes** report 2018



Making
sense
of media

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Overview

This report (and the accompanying annexes) examines children's media literacy. Ofcom's definition of media literacy is the ability to use, understand and create media and communications in a variety of contexts. The report is a reference for industry, stakeholders and the general public.

The Communications Act 2003 placed a responsibility on Ofcom to promote, and to carry out research in, media literacy. This report on children and parents contributes to Ofcom's fulfilment of this duty.

Drawing largely on our quantitative Children and Parents' Media Literacy Tracker, the report provides detailed evidence on media use, attitudes and understanding among children and young people aged 5-15, as well as detailed information about media access and use by young children aged 3-4. The report also includes findings relating to parents' views about their children's media use, and the ways that parents seek – or decide not – to monitor or limit use of different types of media.

This report also draws on several other research sources, detailed in the annex, to provide an overarching narrative on children's media experience in 2018.

Key findings


- **TV sets and tablets dominate device use**, but time spent watching TV on a TV set (broadcast or on demand) is decreasing
- **The viewing landscape is complex**, with half of 5-15s watching OTT television services like Netflix, Amazon Prime Video and Now TV
- **YouTube is becoming the viewing platform of choice**, with rising popularity particularly among 8-11s. Within this, vloggers are an increasingly important source of content and creativity
- **Online gaming is increasingly popular**; three-quarters of 5-15s who play games do so online
- **Social media can bring a combination of social pressures and positive influences**
- **TV and social media are important sources of news**, but many have concerns over the accuracy and trustworthiness of news on social media
- **A majority of online 12-15s think critically about websites they visit**, but only a third correctly understand search engine advertising

- **Children are still being exposed to unwanted experiences online**, but almost all recall being taught how to use the internet safely
- **There has been an increase in parents of 12-15s and of 12-15s themselves saying that controlling screen time has become harder**; however most 12-15s consider they have struck a good balance between this and doing other things
- **Parental concerns about the internet are rising**, although parents are, in some areas, becoming less likely to moderate their child's activities

Media Lives by age: a snapshot

Below is a snapshot of how children use and interact with media devices and services, split by age.

3-4s



1% have their own smartphone, 19% have their own tablet.

96% watch TV on a TV set, for **14h a week**.

30% watch TV on other devices, mostly on a tablet.

36% play games, for nearly **6¼h a week**.

52% go online, for nearly **9h a week**.


69% of these mostly use a tablet to go online.

32% watch TV programmes via OTT services (like Netflix, Now TV or Amazon Prime Video).

45% use YouTube, 80% of these say they use it to watch cartoons while 40% say funny videos or pranks.

1% have a social media profile

5-7s



5% have their own smartphone, 42% have their own tablet.

97% watch TV on a TV set, for around **13¼h a week**.

44% watch TV on other devices, mostly on a tablet.

63% play games, for around **7½h a week**.

82% go online, for around **9½h a week**.


67% of these mostly use a tablet to go online.

44% watch TV programmes via OTT services (like Netflix, Now TV or Amazon Prime Video).

70% use YouTube, 65% of these say they use it to watch cartoons while 61% say funny videos or pranks.

4% have a social media profile.

8-11s



35% have their own smartphone, 47% have their own tablet.

94% watch TV on a TV set, for nearly **13h a week**.

43% watch TV on other devices, mostly on a tablet.

74% play games, for around **10h a week**.

93% go online, for around **13½h a week**.

45% of these mostly use a tablet to go online, with 24% mostly using a mobile.


43% watch TV programmes via OTT services (like Netflix, Now TV or Amazon Prime Video).

77% use YouTube, 75% of these say they use it to watch funny videos or pranks while 58% say music videos.

18% have a social media profile.

40% who own a mobile are allowed to take it to bed with them, it's 28% among tablet owners.

12-15s



83% have their own smartphone, 50% have their own tablet.

90% watch TV on a TV set, for around **13¼h a week**.

62% watch TV on other devices, mostly on a tablet or mobile.

76% play games, for around **13¼h a week**.

99% go online, for **20½h a week**.

53% of these mostly use a mobile to go online, with 23% mostly using a tablet.

58% watch TV programmes via OTT services (like Netflix, Now TV or Amazon Prime Video).

89% use YouTube, 74% of these say they use it to watch funny videos or pranks with same proportion saying music videos.

69% have a social media profile.

71% who own a mobile are allowed to take it to bed with them, it's 61% among tablet owners.



Summary of key findings

TV sets and tablets dominate device use

As in 2017, there are two devices that continue to be used by a majority of children in each age group: television sets (used by 94% of 3-4s and 97% of 5-15s) and tablets (used by 58% of 3-4s and 76% of 5-15s). The only media devices that 5-15s are using more than in 2017 are smart TV sets (six in ten now use one), while a rise in tablet ownership among 5-7s means that 42% of this age group now have one of their own, up from 35% the previous year.

Compared to last year, among 5-15s overall there has been a decrease in the use of computers, laptops, netbooks, games consoles and DVD/ Blu-ray players. This continues a trend of declining use of these devices over several years.

As last year, more than nine in ten (92%) children aged 5-15 go online using any type of device, and this increases with age, ranging from 52% of 3-4s to 99% of 12-15s. Around six in ten 5-15s use a tablet or a laptop or to go online, while half use a mobile phone.

However, time spent watching TV on a TV set is decreasing

Although TV sets are used by almost all children, TV viewing on the TV set appears to be of lessening importance. Our Media Literacy Tracker shows that compared to 2017, the estimated time spent watching television content on a TV set (whether broadcast or on demand) in a typical week has decreased by about one hour for 3-4s, 8-11s and 12-15s.

These findings have been supported by other data sources used in the report; BARB data show that children aged 4-15 watched an average of just over ten hours of broadcast television per week in 2017, down by just under two hours per week since 2016. The decline is a continuation of longer-term annual falls in weekly viewing: in 2017 the decline was greater than in 2016 (at just over an hour) while in 2015 viewing fell by 45 minutes.

Looking at the underlying behaviour behind this decline in TV viewing on a TV set, our Media Lives research shows that in general, consuming content is becoming a more solitary activity, with many children watching on their mobiles. Live TV viewing is increasingly limited to 'appointment to view' programmes such as live sport e.g. the 2018 World Cup, or popular must-see shows such as *Love Island*.

The question arises: Where has this time, previously spent watching TV on a TV set, gone? We can see that time spent online has increased among 3-4 year-olds (by 1 hour) and time spent gaming has risen among 12-15s (by 1.5 hours). For the first time, 8-11s join 12-15s in spending more time on the internet than watching TV on a TV set.

The viewing landscape is complex, with half of 5-15s watching OTT television services like Netflix, Amazon Prime Video and Now TV on any device

For the first time in this study we asked about children's viewing of 'over the top' (OTT) TV services¹. One third of 3-4s (32%) and half of all 5-15s (49%) say they use OTT television services like Netflix, Amazon Prime Video and Now TV. BARB data show that although live TV viewing declined in 2017, for children, 'unmatched viewing'² on the TV set – which includes viewing of video-on-demand services such as Netflix – increased. So children are not only spending less time using the TV set overall, they are watching different types of content when they do use it.

With the proliferation of services offering TV content, children are viewing a very wide range of content. While films are the most-mentioned 'favourite' content on OTT television services among 5-15s, particularly among 12-15s, it is the variety of content that children watch via these services that is notable. Among children aged 5-15 no single programme, box set, film or other type of content was nominated as a favourite by more than one in ten respondents.

In terms of attitudes towards this content, a majority of 12-15s who watch OTT content (71%) think that their favourite programme is age appropriate (either aimed at people their age, people younger than them, or aimed at everyone), while a quarter feel it is aimed at people older than them.

YouTube is increasingly seen as the viewing platform of choice, particularly among 8-11s

In addition to the use of OTT services, YouTube is a popular platform for finding content. Following a substantial increase in use between 2016 and 2017, use of YouTube is comparable to last year and increases with age, with close to half of 3-4s (45%) ever having used it, rising to 89% of 12-15s.

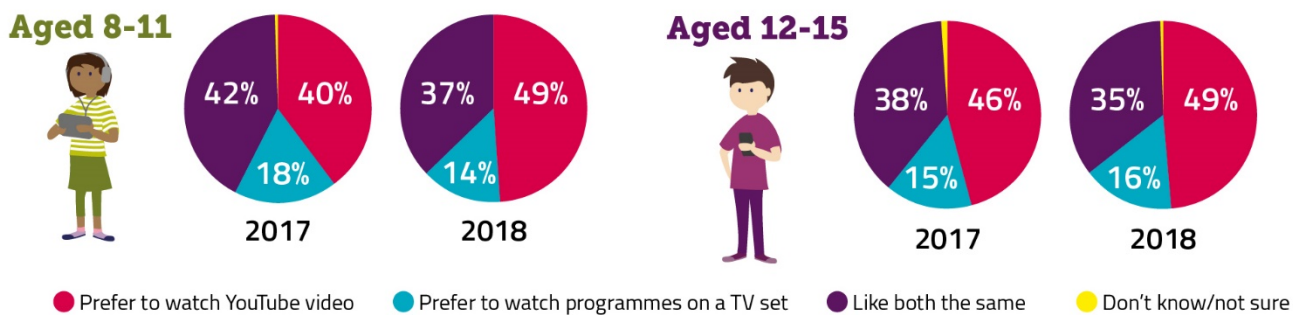
However, this year there has been a shift among 8-11s in how they prefer to view content, with a significant increase in the proportion of this age group (who watch both YouTube and TV on a TV set) who say they prefer to watch YouTube content rather than TV programmes on a TV set (49% vs. 40% in 2017). This increase among 8-11s means that there is a clear preference for watching YouTube content rather than TV programmes on a TV set, both among 8-11s (49% vs. 14%) and 12-15s (49% vs. 16%). Our Media Lives research suggests this might be due to YouTube or Netflix viewing allowing children greater control over their time overall – not just what they watch, but

¹ OTT (or 'over the top') refers to audio-visual content delivered on the 'open' internet rather than over a managed IPTV architecture.

² which refers to activities when the TV set is in use, but the content cannot be matched to broadcast TV programmes and films (this can include subscription VoD like Netflix, apps on smart TVs, DVDs and gaming).

when they watch it. And these services feel more personalised; children can more easily navigate to programmes and content they like, that are aimed at them, and content specifically tailored to their hobbies and interests. For example, Carmen, aged 17, said *“It’s made from people my age for people my age”*. Younger children (13 and under) especially seemed to enjoy content when they related to the characters portrayed. For example, Peter (13) and Ahmed (12) both enjoyed watching ‘Jamie Johnson’ - a show featuring a 12 year-old boy becoming a professional footballer. Both Peter and Ahmed are interested in football and enjoyed watching a programme with a character their age and achieving something in line with their interests.

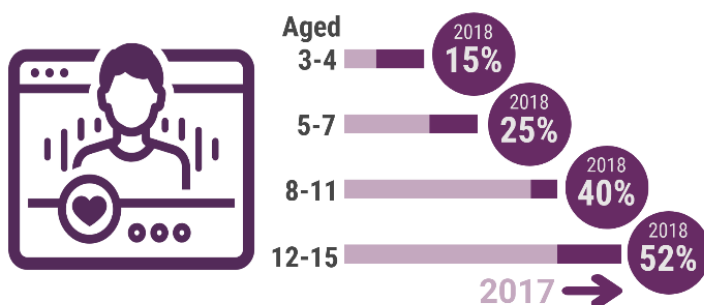
Preference for watching YouTube vs. TV programmes on a TV set, among 8-11s who watch both



Vloggers are an increasingly important source of content and creativity

Compared to 2017, children aged 3-15 are more likely to watch vloggers on YouTube, with the most significant rise coming from the 12-15 age group – 52% of whom now claim to watch vloggers, up from 40% a year ago. Other forms of content have also grown in popularity since 2017, namely ‘how-to’ and unboxing videos and game tutorials (‘Dan TDM’ was popular for Fortnite and Minecraft tutorials in our Media Lives study).

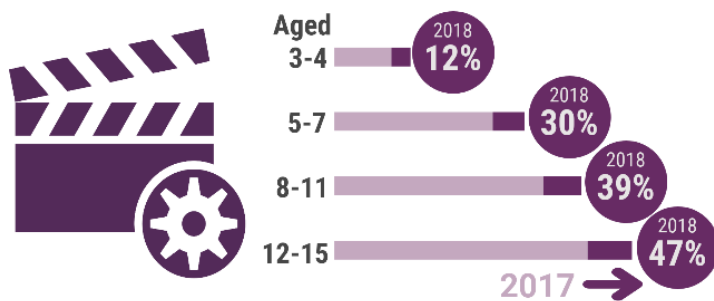
Viewing of Vloggers or YouTube personalities, among YouTube users



Vloggers are not just an important source of content, they are also a source of inspiration and aspiration. Many of the children in our Media Lives study were inspired by YouTubers or skilled contributors to Musical.ly³ and were aspiring to create content like them. As such, some were regularly posting their own content on YouTube or Musical.ly. Some children had a sense they might ‘get discovered’ by posting this content, in part fuelled by their perception that the content produced by YouTubers was accessible, often including ‘bloopers’ or presented in a casual attitude. The content children posted on YouTube therefore often mimicked other YouTube content.

This creativity is also evident in our tracker research; ‘making a video’ was one of the most popular online activities for 5-15 year-olds (undertaken by 40% of 5-15s overall, rising to nearly half of 12-15s), while 15% make their own music online. Both of these activities have seen a significant rise since last year.

Use of any device to make a video, among children who go online



Online gaming is increasingly popular among 5-15s

As with using the internet, the estimated weekly hours spent gaming increase with age, ranging from 6 hours 12 minutes for 3-4s who play games to 13 hours 48 minutes for 12-15s. For most age groups this has remained relatively static since last year, but children aged 12-15 who play games say they spend an extra hour and a half gaming per week compared to last year.

Of all the activities we cover, it is in gaming where we see the biggest gender disparities: boys in each age group spend more hours than girls in a typical week playing games, with the difference by gender increasing with the age of the child. On average girls aged 12-15 spend around 9 hours per week gaming (9 hours 18 minutes) while boys of this age spend over 16 hours (16 hours 42 minutes).

Among those who play games, three-quarters of 5-15s ever play games *online*; an increase from two-thirds in 2017. The incidence of online gaming increases with age, ranging from 37% for 3-4s to 87% for 12-15s.

Gaming can have a strong social element; close to two in five online gamers aged 8-11s (38%) and three in five aged 12-15s (58%) say they use online chat features within the game to talk to others. In terms of who they are talking to, they are more than twice as likely to chat through the game to people they already know outside the game (34% 8-11s, 53% 12-15s) than they are to chat to people

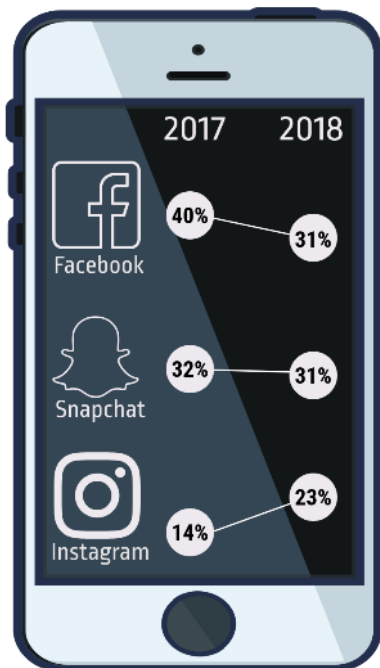
³ A social media platform where users create and share short videos based on music, now called TikTok

they know only through playing the game (10% 8-11s, 25% 12-15s). Boys aged 12-15 who play online games are also twice as likely as girls to say they chat to people they only know through a game (30% vs. 16%).

Social media can bring a combination of negative pressures and positive influences

While the proportion of children with a social media profile has remained static since 2017 (70% of 12-15s and 20% of 8-11s who go online have a profile), there have been shifts in which apps/messaging sites are preferred. While Facebook remains the most popular social media site or messaging app, used by 72% of 12-15s with a social media profile, 12-15s are more likely than in 2017 to use Instagram (65% vs. 47%) and WhatsApp (43% vs. 32%). In addition, fewer nominate Facebook as their main site or app (31% vs. 40%). Close to a quarter (23%) nominate Instagram as their main site or app, up from 14% in 2017.

Main social media sites used among 12-15s with a social media profile



Use of social media proves to have both benefits and drawbacks. Twelve to fifteens who use social media or messaging sites/apps are aware of some of the social pressures and negative associations with this use, with 78% feeling there is pressure to look popular and 90% saying that people are mean to each other on social media, at least 'sometimes'.

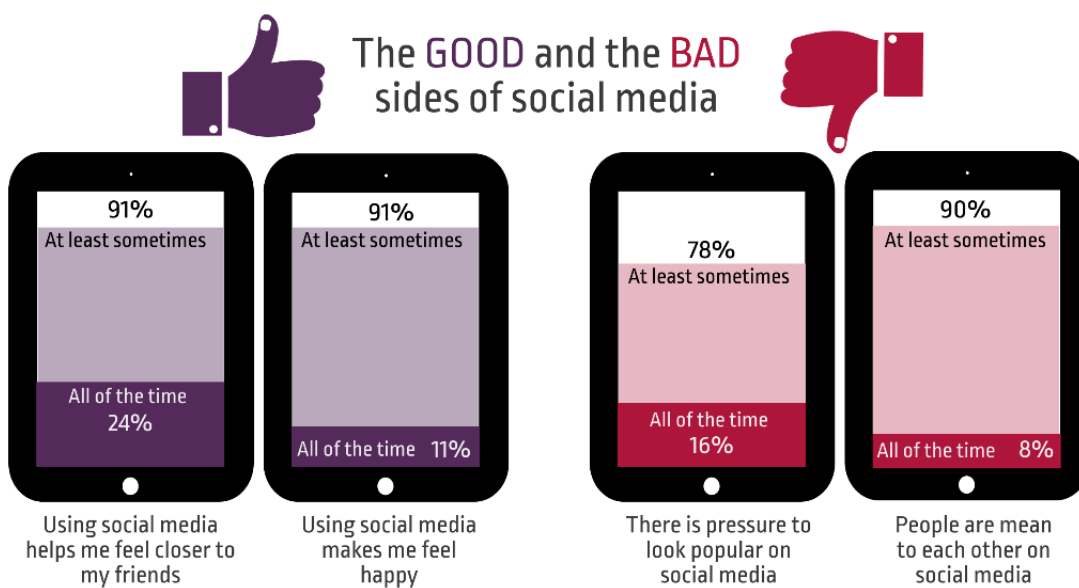
These pressures are particularly felt among girls. Girls aged 12-15 with a social media or messaging profile are more likely than boys to feel pressure to look popular on these sites 'all of the time' (20% vs. 11%) and are more likely to feel that there should be rules about what people can say online to prevent hurtful comments (77% vs. 67%). Supporting this, some of the girls in our Media Lives study were this year choosing more glamourised or aesthetic Snapchat filters, rather than the 'cute' animal faces they had used in previous waves; these are popular as they are thought to make faces look 'prettier' and 'brighter'.

However, alongside these pressures some children are being savvy in their use of social media; most older children are aware that profiles can be highly curated and do not always reflect real life. Just over half of 12-15s who go online (54%) agree that the images or videos that people post online make their life look more interesting than it is; less than one in ten (6%) disagree.

In line with this, our Media Lives research shows that some children had multiple accounts on the same social media platform, which had different levels of visibility to their social groups. Children posted different content on these profiles depending on who they allowed to see each profile; more visible accounts tended to be more highly curated, showing a 'picture-perfect' self, while less visible accounts tended to be used to show their 'real self' to more carefully controlled circles of close friends. In this way, while some may feel pressure to look attractive or popular on social media, children are finding strategies to still be themselves, at least some of the time.

Further, the negative pressures are balanced by the positive side of social media; nine in ten social media users aged 12-15 state that social media has made them feel happy or helped them feel closer to their friends. Two-thirds of 12-15s who use social media or messaging sites say they send support messages, comments or posts to friends if they are having a hard time, and one in eight support causes or organisations by sharing or commenting on posts.

Attitudes towards social media, among 12-15s with a social media account



TV and social media are important sources of news, but many have concerns about the accuracy and trustworthiness of news on social media

This year we commissioned an online News Consumption Survey among teenagers aged 12-15 to better understand their habits and attitudes in relation to news. We asked these young teens how often they read, watch, listen to or follow the news, and three in four said they consumed it at least weekly (77%). Six in ten (62%) say they *actively* look for news on at least a weekly basis, while a greater proportion – eight in ten – report seeing news inadvertently, for example by hearing it from other people or coming across it while looking for something else.

When asked which platforms they used to access news ‘ever’, the most popular responses were ‘via TV’ (68%), followed by talking with family (64%), social media and talking with friends (both 56%). When asked which they used most often for news consumption, TV came top (29%), followed by social media (22%). Mirroring this, the most popular specific news source used to read, watch, listen to or follow news stories was BBC One/BBC Two (used by 45%), followed by Facebook (34%). Indeed, while the BBC was the most popular and most important news source among 12-15s, social media sources dominated the list of the top ten news sources.

Although social media sites are a very popular source of news for young teens, this group ranks them as the least trustworthy and accurate source (conversely, young teens rank TV news most highly against these attributes). Just over four in ten social media news users rate social media highly for providing trustworthy news ‘all or most of the time’ (41%) and providing accurate news stories (45%), while more than eight in ten of those who use TV for news consider it trustworthy (85%) and accurate (86%).

Older children are aware of concerns relating to the accuracy of news on social media; half of 12 to 15s who use social media for news said it is difficult to tell whether news on social media is accurate. It is therefore clear that these children recognise a need to think critically when navigating news on social media, and indeed, 36% say they think about whether a news story they have seen on social media is accurate ‘often or always’, while just over half do this ‘sometimes’ (53%).

In line with this, we looked at the issue of fake news, a concept eight in ten had heard of⁴. Two in five (43%) 12-15s who go online said they had seen something online or on social media they thought was fake news. Six in ten of those who were aware of fake news said they would undertake some action if they saw a fake news story online, with a third saying they would tell their parents or other family members. Four in ten said they wouldn’t do anything or would just ignore it.

⁴ Definition of fake news used: *Fake news stories are those that are false or made up that can appear on websites or on social media as well as on TV, radio or in newspapers. They are written deliberately to mislead people.*

Awareness of fake news and actions taken among 12-15s who go online: 2018

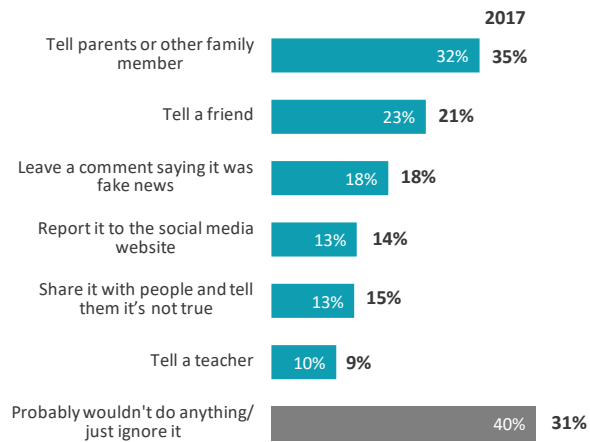
Awareness of 'fake news'

All children aged 12-15



Actions might take if saw a 'fake news' story online

All children aged 12-15 aware of 'fake news'



A majority of online 12-15s think critically about websites they visit, but only a third correctly understand search engine advertising

Another area we explore in this study is children's critical understanding of websites and search engine results. Seven in ten 12-15s (69%) who go online and who visit websites or apps they have not used before, say they 'ever' think about whether they trust the information on these sites or apps to be true or accurate, while a quarter do not consider this.

Children appear to be less likely to critically assess search engine results; at least half of 8-11s (50%) and 12-15s (55%) who use search engines are aware that some of the results returned by these sites can be trusted and some can't; although awareness is lower for 12-15s than in 2017 (62%). Three in ten users aged 8-11 and 12-15 believe that if a website is listed by a search engine it can be trusted: a more likely response among 12-15s compared to 2017 (24%). There are some disparities by gender; boys aged 8-15 who use search engine websites are more likely than girls to feel that the results returned by a Google search can be trusted (34% vs. 28%) while girls of this age are more likely than boys to be aware that some results can be trusted and some can't (56% vs. 48%).

When considering advertising and sponsorship, despite their being distinguished by a green box with the word 'Ad' in it, as in 2017, only a minority of 8-15s who use search engines (23% for 8-11s and 33% for 12-15s) correctly identified sponsored links on Google as advertising and understood that this was the only reason the results were displayed. A greater proportion of online 12-15s (65%) are aware that vloggers may be being paid to endorse a product, a similar result as last year.

Children admit to being exposed to unwanted experiences online

Going online can expose children to unwanted experiences. As in 2017, around one in ten 8-11s and one in five 12-15s who opted to answer the question said they had ever personally experienced some form of bullying. One in eight 12-15s said they had been bullied either face to face (12%), or on social media (11%). Nine per cent said they had been bullied through messaging apps or by text – up from 5% in 2017.

Our study found that 16% of children aged 8-11 who go online have ever seen something online that they found worrying or nasty, but at 31%, 12-15s are nearly twice as likely to have experienced this. However, children are finding ways of managing these risks; nearly all 8-11s and nine in ten 12-15s say they would tell someone – most likely a family member, for both age groups – if they saw something like this online. They are also aware of, and in some cases using, other means of reporting; close to seven in ten 12-15s who go online say they are aware of online reporting functions, and 13% say they have used these to report worrying or nasty content. However, a similar proportion state that although they had seen something like this, they had not reported it (12%).

Similarly, this year most of the children in our Media Lives study were, overall, more willing to discuss inappropriate content than they had been in previous years. In some cases, inappropriate content was signposted by YouTubers or other influencers, so children were likely to come across it after following recommendations from a YouTuber they liked, while in other cases children were open about inappropriate pictures they had been sent on social media. For example, Minnie (aged 17) had been relatively open in previous waves, but had generally avoided sharing too much detail about things that were inappropriate or unclear. In this wave, however, she discussed in detail a recent incident involving her friend, who was planning to stay with a man she had met online. Her friends had become concerned after looking at his social media profile, and after talking to their parents, they decided to tell a teacher and the girl was prevented from going. Minnie had discussed this with her mum previously and was open to talking through the moral dilemma she had faced.

One of the specific areas of concern with regard to internet use is that of talking to strangers. Around one in five 12-15s (22%) who opted to answer the question said they had been contacted online by someone they didn't know, and one in ten (9%) said they had seen something of a sexual nature that made them feel uncomfortable, either online or on their mobile phone.

Children in our Media Lives study showed that they were aware of internet safety advice and that they should not talk to strangers online, but some were exposing themselves to contact from strangers by keeping their social media profiles public or allowing people to add them without knowing who they were. For example, Jasleen (aged 15) chose to keep her Snapchat profile public because she enjoyed being able to share her stories openly, and often received compliments for them. However, that also meant that she regularly received unsolicited, inappropriate messages from boys she didn't know. She seemed to perceive this as normal; an inevitable consequence of keeping her profile open. In this way, the pressure to receive 'likes' or favourable comments can override lessons children have been taught about online safety.

While controlling screen time has become harder, most 12-15s consider they have struck a good balance

Parents' agreement that they find it hard to control their child's screen time increases with the age of the child, from 19% of parents of 3-4s to 44% of parents of 12-15s. New questions asked in our survey this year show that seven in ten 12-15s who own a smartphone are allowed to take it to bed; for tablets this is six in ten – a factor possibly contributing to the difficulty of controlling screen time.



Some of the participants in our Media Lives research this year talked about taking devices to bed. Grant (16) talked about taking his phone to bed with him so he could watch content until he fell asleep, while Emma (9) regularly watched clips on YouTube, in her room, on her phone before going to bed. We have seen this behaviour in previous waves of this research. In contrast, the parents of one child in our sample applied the rule that the children in the house had to put their devices into the playroom 'to be charged' overnight, thereby preventing them taking their devices to their bedrooms.

Controlling screen time is seen as less of a problem among children themselves (compared to their parents), but this year a third of 12-15s (35%) agreed that they found it hard to control their screen time, up from a quarter last year (27%). Despite this increase, just over six in ten (63%) considered they had 'a good balance between screen time and doing other things'. A similar proportion of parents of 12-15s agreed with this statement with respect to their child's media time. For the first time, several older children in our Media Lives study reported self-regulating time spent on social media in order to focus on school work; e.g. deleting social media apps so they would not be distracted from revision and would spend more time in the 'real world'.

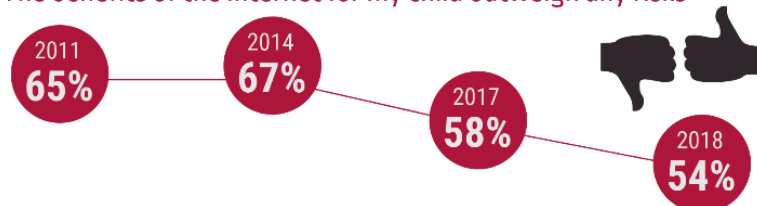
Parental concerns about the internet are rising

Our tracker research reveals that there has been a steady decline over the past few years in the proportion of parents of online 5-15s who agree that 'the benefits of the internet for my child outweigh any risks'; just over half (54%) agree with this now, compared to two-thirds in 2011. Just under half of parents of online 3-4s agree.

Attitudes toward the internet, among parents of children who go online

Proportion of parents of 5-15 year olds who agree

The benefits of the internet for my child outweigh any risks



Following this, when prompted with a list of nine concerns about children's online activities⁵, our survey showed that at least three in ten parents of 5-15s who go online are either 'very' or 'fairly' concerned about each aspect.

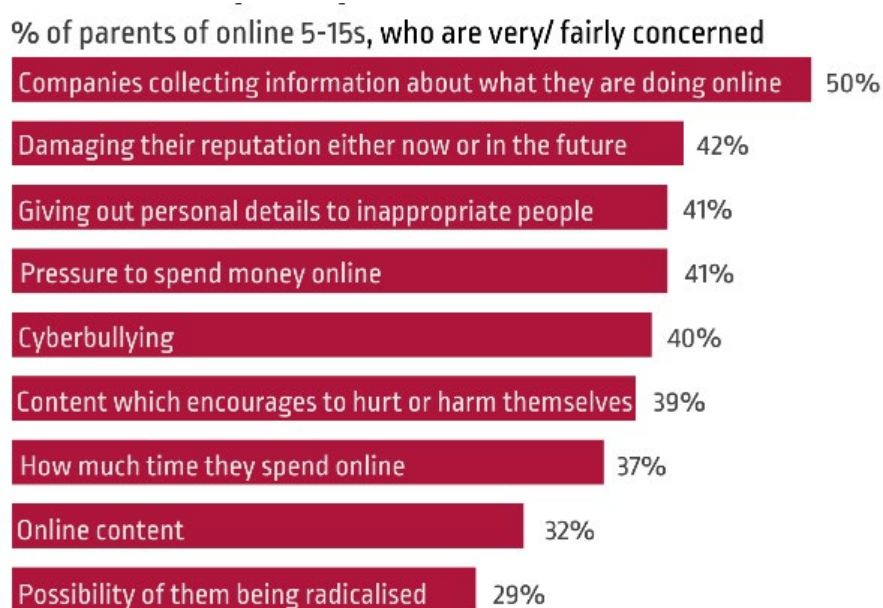
Of the nine areas we prompted on, the one of greatest concern for parents of 5-15s who use the internet is 'companies collecting information about what their child is doing online' (50% of parents are concerned about this). Since 2017 three other issues have increased in their level of concern: the child damaging their reputation (42% vs. 37%), the pressure on the child to spend money online (41% vs. 35%) and the possibility of the child being radicalised online (29% vs. 25%).

These concerns are lower among parents of 3-4s who go online, but they are growing. These parents are more likely than in 2017 to have concerns about seven of the nine areas asked about: companies collecting information about what they are doing online (32% vs. 25%), their child damaging their reputation (27% vs. 18%), giving out details to inappropriate people (25% vs. 18%), pressure to spend money online (31% vs. 21%), cyberbullying (23% vs. 15%), seeing content which encourages them to harm themselves (29% vs. 20%) and the possibility of their child being radicalised online (22% vs. 16%).

But concerns are not just limited to internet use; since 2017 there has also been an increase in the proportion of parents of 3-4s (25% vs. 10%) and 5-15s (34% vs. 29%) who play games, who say they are concerned about the content of the games their child plays.

⁵ Companies collecting information about what they are doing online; damaging their reputation now or in the future; giving out personal details to inappropriate people; pressure to spend money online; cyberbullying; seeing content which encourages them to harm themselves; how much time they spend online; online content; possibility of them being radicalised.

Parental concerns about aspects of their child's internet use, 5-15s who go online



The ease of spending, and pressure to spend money online is increasing

The issue of spending money online appears to be one of increasing concern. Seventeen per cent of children aged 12-15 who opted to answer the question said they had accidentally spent money online; almost double the proportion in 2017 (9%). In line with this, compared to the previous year, parents of 3-4s (31% vs. 21%) and 5-15s (41% vs. 35%) are now more likely to say they are 'very' or 'fairly' concerned about the pressure on their child to spend money online.

Online spending also arose in our Media Lives study. In some cases, children had purchased merchandise marketed by characters they liked or related to; for instance, Bryony and Emma (both 9) liked JoJo Siwa's style, which she promoted through her show and on YouTube, and had bought branded clothes and her signature ponytail bows. Others could recall products such as games or gadgets that their favourite YouTubers had recommended. For instance, Zak (8) was interested in buying goods he saw marketed on YouTube. He had wanted to buy a PlayStation in order to play the online game 'Fortnite', because he had watched his favourite YouTuber, 'Dan TDM', playing the game and wanted to join in.

Spending money while gaming is an area of specific and growing concern among parents of children all ages; a quarter (25%) of parents of 3-4s who play games are concerned about the pressure on their child to make in-game purchases for things like access to additional points, tokens or levels, or for game upgrades or add-ons, up from 16% last year. Four in ten parents of 5-15s (39%) share this concern, up from 30% the previous year. These purchasing habits were evident in our Media Lives study, where a couple of the children had purchased in-game items while playing Fortnite, such as 'skins' or personas affecting the appearance of the allocated character; and other cosmetic items, such as 'dances' in-game characters could do to show to other players that they were celebrating.

While one of the parents in the study had installed a safeguarding system called 'Ask to buy' on the app store which prevented her son from making any purchases without her consent, only a minority of parents appear to make use of such mediation strategies; our tracker shows that only one-fifth of parents of 5-15s who use smartphones or tablets have disabled in-app purchasing.

Despite rising concerns, parents are, in some areas, less likely to moderate their child's activities

Parents can mediate their children's access to and use of media devices and services in a variety of ways. To control access to TV services, parents can opt to use voluntary PINs to restrict children's access to unsuitable content, such as programmes with adult themes, sexual or violent content. Close to four in ten parents of 5-15s (38%) use such PINs on their TV service, and of those who do, more than four in five (85%) agree that they are effective, an increase since 2017 (80%).

In terms of moderating online activities, nearly all parents of 3-4s and 5-15s (97%) mediate their child's use of the internet in some way, either through technical tools, supervision, rules or talking to their child about staying safe. One in five parents of 3-4s (22%) and more than a third of parents of 5-15s (37%) use all four of these strategies. Importantly, parents feel equipped in this area, with almost eight in ten parents of online 5-15s agreeing that they feel they 'know enough to help their child stay safe online'.

About eight in ten parents of online 3-15s were aware of at least one of six technical tools asked about⁶; more than half of parents of 3-4s (56%) and 5-15s (59%) used at least one of them. However, since 2017 there is lower awareness of content filters among parents of online 3-4s and 5-15s (from 66% to 51% for parents of 3-4s; and from 62% to 57% among parents of 5-15s).

Among parents of 5-15s who are aware of content filters, half say they opt not to use them because they prefer to use other mediation strategies (like supervision, having rules or talking to their child) or because they trust their child to be sensible (48%).

Talking about online safety is a key mediation strategy. Overall, eight in ten parents of online 5-15s (81%) have ever talked to their child about staying safe online. Compared to last year, parents of 3-4s who go online are more likely to have ever talked to their child about this (35% vs. 26%) while parents of 12-15s are less likely (87% vs. 92%).

Similarly, when children themselves were asked about this topic, nearly all internet users aged 8-11 (95%) and 12-15 (96%) recall being told about how to use the internet safely, with children most likely to have received the information from a parent or teacher. However, compared to 2017, children aged 12-15 are less likely to say they have received information or advice from a parent (71% vs. 83%). In line with this, our Media Lives study showed that some parents (especially of older children) generally trusted that their children were sticking to common-sense rules when using the

⁶ 77% of parents of 3-4s and 83% of parents of 5-15s who have home broadband and whose child goes online are aware of one or more of these six technical tools: Network-level content filters, parental control software content filters, parental controls built into device, PINs/ passwords required for websites, safe searches enabled on search engines, YouTube restricted mode

internet and were not overly worried about the information or content their children were sharing online. Some also felt that the topic of internet safety had been adequately covered at school. For example, Carmen’s mum felt she could trust her daughter and while she had tried to talk to her about the issue of sexting this year, she felt Carmen (17) seemed already informed on the subject, as it had been discussed at school.

Alternatively, some parents were resigned to feeling they had limited control over their children’s online activities. For example, Sarah’s mum generally checked up on what Sarah’s younger siblings did online, but she felt that she did not need to check what Sarah (aged 15) did, as she was old enough to make her own decisions. In any case, she felt there was no way of stopping Sarah having social media accounts; she explained *“I just have to trust her”*.

Use of social media appears to be an area in which parents are relatively confident in their child’s ability to manage their online life. Although 13 is the minimum age for most of the social media sites we asked about, 12% of nine-year-olds have a social media profile; by age 10, 21% have a profile and 34% do by age 11. Linked to this, only a minority of parents (between 21% and 32%) whose child has a profile one of the social media accounts about which we asked, know, and can state correctly, the minimum age for Facebook, Instagram and Snapchat. And a substantial minority of parents whose child goes online agree they would allow them to use social media sites before they had reached the minimum age (25% of parents of 8-11s who go online, rising to 40% of parents of 12-15s who go online).

Social media use by age, and awareness of minimum age requirements, among parents whose child has relevant social media

