

Online Advertising Experiences Survey

Research report



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1 Executive summary

The Department for Culture, Media, and Sport (DCMS) commissioned Ipsos Mori to conduct research aimed at gathering evidence on the online advertising experiences of internet users aged 18 and over, as well as children, through insights provided by their parents.

To provide robust evidence around the scale and impact of advertising that is perceived to be illegal and/or misleading, a nationally representative survey was commissioned. This survey aims to improve understanding of the prevalence of the public exposure to perceived illegal or misleading online advertising across the UK and the impacts this is cited as having on individuals.

The research measures the proportions of UK adults who recall seeing adverts that they perceived to be for illegal products/services and adverts which they perceived to include misleading content. The research also covers parents' perceptions of their children's exposure to adverts for age-inappropriate products and services. The findings provide measures around the scale of exposure and its impact, allowing for comparisons across different demographic groups across the population.

The survey was undertaken using the Ipsos KnowledgePanel, an online panel of UK adults that uses random probability sampling. Fieldwork was conducted between 4-10 April 2024 with 8,511 people aged 16+ across the United Kingdom.

1.1 Broader online experiences, safety and levels of concern

Respondents in the survey were first asked about their broader use of the internet and more general attitudes towards online safety before being asked about their recall of perceived illegal or misleading adverts. This provides some broader understanding of online behaviours and attitudes as context for later findings.

Using social media sites/apps is highlighted as the most common online activity; it is the most likely activity selected by all age groups up to those aged 65+ as what respondents spend the most time doing when online (those aged 65+ are most likely to cite spending time looking at online news sites).

Regarding online safety (and covering all types of online content), the majority of people surveyed feel they have some control to avoid seeing harmful or offensive online content; when asked which of a pair of statements was closest to their own view, the majority feel that steps can be taken to avoid harmful content online:

- 78% selected "*using a bit of common sense when you are online usually prevents you from seeing harmful or offensive content*", compared to
- 13% who selected "*it is impossible to avoid seeing harmful or offensive online content*".

This is reflected in the majority using at least some form of online protection (81%), with antivirus software the most frequently used (59%).

There is also a broad appetite for further online safety measures to be put in place. When asked to select from the following two statements regarding online safety in general (not related specifically to advertising or any other particular aspect of online behaviour), most people support additional measures:

- 62% selected "there should be more online safety measures in place", compared to

- 25% who selected “there are enough online safety measures in place”.

When prompted with a list of potential concerns when using the internet, 41% of all respondents selected at least one of the five categories relating specifically to online advertising within their top concerns. Amongst these, inappropriate advertisements for children were noted as being within the top three concerns by 11% of all respondents (rising to 16% amongst those with children), misleading adverts by 8% and illegal adverts by 4%.

With regards to broader online concerns, respondents were most likely to select scams, fraud, or phishing as a top concern when online (selected by 59% as being within their top three concerns), data collection without knowledge/ permission (43%), and/or misinformation, i.e. false or misleading stories, claims or assertions e.g. ‘fake news’ (37%). Concerns relating to scams, fraud or phishing may relate to a range of activity online, potentially covering aspects of online advertising, though the survey did not go into further detail on this category.

1.2 Recall of exposure to perceived illegal online advertising and its impact

Before being asked about their recollection of seeing/hearing online advertising that they may have perceived as being illegal, respondents were presented with the following information to help frame the issue and ensure consistency across interviews:

Illegal online advertising is when a company or person uses the internet to promote activities, products, or services that are against the law. This could include advertising for services that facilitate illegal activities like human trafficking or cyber scams, promoting illegal items such as drugs, unauthorised medications, weapons, or fake products, or offering services that are not allowed by law.

Respondents were then asked about the following five different types of illegal products/services. Whilst this information and the prompting with categories provides some steer, respondents needed to decide whether or not the adverts they may have seen were for products or services that were illegal (or not). The survey measured the extent to which the public recall having either *definitely* or *possibly* seen advertising for different types of goods or services that they perceived to have been illegal.

- *Adverts which facilitate illegal activity, such as fraud or cyber crime*
- *Adverts for illegal products, such as illegal drugs and pharmaceuticals, or weapons*
- *Adverts for counterfeit products*
- *Adverts for illegal services, such as illegal adult services, including brothels, sexual exploitation, or sex trafficking and illegal health services*
- *Adverts for illegal services such as unregistered clinics offering cosmetic procedures*

In total, 73% said they had either definitely ever seen or had possibly ever seen at least one advert for a type of perceived illegal product/ service. This falls substantially to around a third overall (32%) who said that they had definitely seen at least one type of perceived illegal online advertising at some point, with 28% overall saying they had definitely seen at least one within the past year, 22% within the past six months and 10% within the past month. The majority of those who said they had seen an ad they perceived to be illegal indicated the last time they saw such an ad was within the past year (87%).

The proportions saying they had ever seen each type of illegal advert were as follows, with the high proportions of those saying they had *possibly* seen such adverts likely reflecting a lack of certainty in people’s recall and potential confusion that exists amongst many with regards to the (il)legality of some products/services they perceive to have seen advertised online:

- **Counterfeit products;** 22% said they had *definitely* seen an advert for counterfeit products, with a further 38% saying they had *possibly* seen one.
- **Adverts for illegal services such as unregistered clinics offering cosmetic procedures;** 11% said they have definitely seen, with another 37% saying they had possibly seen.
- **Adverts which facilitate illegal activity, such as fraud or cyber crime:** 10% said they had definitely seen, with a further 27% noting they had possibly seen.
- **Adverts for illegal services such as illegal adult services, including brothels, sexual exploitation, or sex trafficking and illegal health services:** 9% said they had definitely seen and 18% noted they had possibly seen.
- **Adverts for illegal products such as illegal drugs and pharmaceuticals, weapons:** 7% said they had definitely seen, with another 20% saying they had possibly seen.

Men and adults in the younger age groups (aged 16-34) were generally more likely than women and older respondents to say they had seen perceived illegal adverts across most of the categories above.

When asked to describe the most recently seen illegal advert or what it was advertising, the most common responses cited counterfeit clothing (8%), sexual services (7%), counterfeit goods more generally (7%) and/or drugs or medication (6%).

Among those who said they recall having *definitely* ever seen an online advert that they perceived to be for a type of illegal product/service, the large majority noted being exposed to this content more than once within the past year (82% of them said they had seen illegal online advertising more than once within the past year, equating to 26% of all those surveyed).

Reflecting online activity more broadly and how most people spend their time online, social media is cited as the primary platform where people believed that they encountered advertising for perceived illegal goods/services; social media websites or apps were cited by 58% of those who say they had definitely seen a perceived illegal advertisement within the last 12 months. Beyond social media, other sites/services where perceived illegal advertisements were cited as being seen included search engines (14%), shopping websites or apps (12%) and adult sites (7%).

In terms of the perceived impacts of exposure to illegal online advertising, a quarter (25%) of those who said they had definitely seen such advertising in the past 12 months noted that it made them feel stressed, anxious or had some other impact on their mental health, at least to some extent. This equates to 7% of all those surveyed. Women and those in lower income households (annual household income of under £26,000) were comparatively more likely to say that seeing the illegal advert had made them feel stressed, anxious or had some other impact on their mental health, at least to some extent.

Around one in ten (9%) of those who noted they had definitely seen such advertising in the past 12 months said that it had led to some financial loss to them (equating to 3% of all those surveyed).

1.3 Recall of exposure to perceived misleading online advertising and its impact

Before being asked about their recollection of seeing/hearing what they perceived to have possibly been misleading adverts, respondents were presented with the following:

Misleading advertising is, more often than not, difficult for a consumer to identify unless they have responded to the ad, purchased or otherwise have experience of the advertised product, service or activity. Misleading online advertising is when a company or individual uses the internet, knowingly or otherwise, to market false or deceptive information about a product, service, or activity. This could

involve making exaggerated claims about a product's capabilities or hiding important information that is important for consumers, for example hidden costs that must be paid by the consumer.

As with people's recall of seeing potentially illegal advertising, there is ultimately a judgement that the respondent needed to make with regards to whether or not the ads they recall were misleading, which relies on perceptions and broader impressions unless a respondent has had direct experience of the relevant product/service. The question that was asked of respondents includes a measure of how confident they were in their perceptions of an advert being misleading: *'Have you ever seen any advertisement online that you know is misleading or strongly suspect to be misleading because of the inclusion or exclusion of claims, including claims that are visual'?*

Overall, one in five (20%) respondents said they thought they had ever seen or heard online advertising that they knew was misleading, while a further 39% said that they had seen online advertising that they strongly suspect was misleading. Almost all of those who said they had seen/heard online advertising that they *knew* was misleading had done so within the past year (19% of the overall sample), with 17% overall saying they had seen/heard such an advert in the past six months and 10% within the past month.

As with variations by sub-group in the recall of perceived illegal advertising, men and younger adults aged 16-34 were comparatively more likely to say they had seen adverts online that they knew to be misleading, both at any point in time and more recently.

The majority of those who said they had seen online advertising that they knew to be misleading cited having seen it multiple times (94% of them more than once in the past year). Social media was again, by far, the most likely channel through which people reported to have seen an advert which they knew to be misleading (highlighted by 65% to be where they had seen it, which again will, at least to some extent, reflect the fact that social media use is the most frequent online activity).

When asked to describe the most recent online advert that they knew to be misleading, there were no dominant types of products or services cited, though health and beauty products were the most likely to be mentioned.

In terms of perceived impact, the proportions of people who cited advertising they knew to be misleading in the past year to have had an impact on their emotional health or financial wellbeing, were very similar to those noting similar impacts due to exposure to online adverts that they perceived to be illegal. A quarter (24%; equating to 5% of all those surveyed) said that it made them feel stressed, anxious or had some other impact on their mental health, whilst one in eight (12%; equating to 2% of all those surveyed) noted that it had led to some personal financial loss.

1.4 Actions taken when seeing online adverts that are perceived as illegal or misleading

Half of those (50%) who said they had seen advertising online within the past 12 months that they felt was definitely illegal went on to note that they took some form of action when seeing it. The most likely form of action was clicking the report/flag button or marking the advertisement as junk (28% of these respondents noting that they did this).

Younger and middle-aged groups (covering those aged 16-54) were less likely to take any action compared to older respondents (aged 55+), whilst those within the higher income brackets (annual household income of £52,000+) were also comparatively less likely to take any action.

The most frequently cited reasons for not taking any action were the perception that it would not help or make a difference (cited by 36% of those not taking action), lack of awareness of what to do or who to inform (29%), and lack of motivation (23% noting that they couldn't be bothered or did not have time).

The pattern of actions taken by those who recalled having seen an advert they knew to be misleading in the past 12 months is very similar to those taken by people who noted having seen adverts that they perceived to be illegal, with clicking the report/flag button or marking as junk, by some margin, the most likely action taken (by 25%).

A minority of those who recalled seeing perceived illegal or misleading advertising said that they had reported an advert to an official body such as Ofcom, the Advertising Standards Authority (ASA) or Action Fraud, or had informed either the police or a support service (3% of those who recall having definitely seen an advert they perceived to be illegal and those who recall seeing an advert they knew to be misleading in the past 12 months). Around two in five (41%) of those who did, say they had received an automated response. In 18% of cases, they noted that they had been informed that the advertisement had been removed, whilst fewer said they had received a written response or been asked for further information. Around three in ten (29%) of those reporting an advert they perceived to be illegal and around a quarter (23%) of respondents who had reported an advert they knew to be misleading said they were not aware of any action having (yet) been taken.

Just over a quarter (27%) of those reporting adverts that they perceived to be either illegal or misleading said they were *satisfied* with the reporting/complaints process. This compares to 41% of those reporting adverts they perceived to be illegal and 49% of those reporting adverts felt to be misleading who said they were *dissatisfied* with the process.

1.5 Parents' views of children's internet use and exposure to online advertising

The information gathered in the survey from parents about their children's online activities and exposure is based on the perspective of the parent, which will not encompass the entirety of their child's online experience, nor necessarily reflect the viewpoint of their children regarding interactions with potentially harmful adverts. These responses from parents will also be subject to recall bias in terms of the types of online content that parents remember and the extent to which they accurately attribute their child's exposure to this content. Some of the responses from parents highlight the likely inaccuracies within their views of what their children have been exposed to via online advertising.

Parents in the survey were asked about a child in their household between the ages of 2 and 15 (with a child selected at random where a parent had more than one child within this age range).

Nine in ten (90%) parents reported that their children use the internet, with 58% indicating daily usage across various devices, primarily smartphones and tablets. These perceived levels of usage vary significantly depending on the age of the child, with older children reported as having far higher levels of usage than younger children in households.

While 76% of parents expressed confidence in knowing what their children see online, 23% were not confident. Parents were far more likely to feel very confident in knowing what a 2–5-year-old child is seeing/hearing online than they are older children in the household.

The majority cited taking some measures to protect their children online, most commonly parental controls or apps for specific devices (cited by 64% of parents), discussing risks/dangers with their

children (63%), using PINs or passwords on devices/websites (49%) and engaging parental wi-fi controls in the home (41%). A further 17% said they used adblockers.

When prompted with a list of potentially inappropriate products and services¹ that their children may have seen advertised online, parents were most likely to identify food and drink which are high in fat, salt or sugar content (48%), gambling products/companies (21%), cigarettes, tobacco and other smoking-based products (16%), and alcohol (16%) as types of adverts they either thought or knew that their child had seen online.

In total, 57% of parents surveyed said that they thought or knew that their child had seen at least one of the categories of products/services advertised online. This increases from 45% of parents answering about a 2–5-year-old, to 57% regarding 6–10-year-olds and 64% for 11-15-year-olds. Parents of 11–15-year-olds were also far more likely to explicitly say that they did not know if their child had seen these types of adverts online (23% of parents of this age group).

Parents were not asked how certain they were about what their children had seen advertised and so it cannot be ascertained how confident they were in each of their responses. The presence of smoking-based products within the most frequently mentioned items – despite being illegal to be advertised – suggests that some parents in the survey likely extended their stated recall beyond online advertising.

As with the perceived illegal and misleading adverts seen by adults, social media was identified as the most likely route through which children are thought to see these adverts. The survey did not go into detail about the social media sources and so it is not possible to tell which accounts may be used (i.e. a parent's or child's account), and the survey did not collect data on social media profiles so is it not possible to assess whether the children about whom the parents are responding have accurate age profiles within social media accounts.

The majority of parents considered the websites, apps or forums where they thought their children had seen or may have seen these advertisements to be suitable mainly for adults or all age groups (51%-68% across the different types of products/services), as opposed to mainly suitable for children (between 20-40% across the different products/services considered the website/app/forum as being mainly for children). These findings, coupled with the broader considerations around parents providing views on their children's exposure, highlight that the perceived levels of exposure of children to these types of adverts cannot be assumed to have been through inappropriately targeted adverts.

¹ Most, though not all, of the items in the list of products and services shown in the survey are illegal to be sold to under 16 year olds, Some other items are legal but advertising guidelines mean that adverts for these products/services cannot be targeted at under 16 year olds.

2 Introduction

2.1 Research Objectives and methodology

The research measures the proportions of UK adults who recall having seen online advertising that they perceived to be for illegal products/services and/or online adverts which they perceived to include misleading content. The research also covers parents' perceptions of their children's exposure to adverts for age-inappropriate products and services. The findings provide measures around the scale of perceived exposure and its perceived impact, allowing for comparisons across different demographic groups across the population.

The survey data was collected using the UK KnowledgePanel, Ipsos' online random probability panel. Panellists are recruited via a random probability, unclustered address-based sampling method. Letters are sent to selected addresses in the UK (using the Postcode Address File) inviting them to become members of the panel. Members of the public who are digitally excluded are able to register to the KnowledgePanel either by post or by telephone, and are given a tablet, an email address, and basic internet access which allows them to complete surveys online. Invited samples are stratified when conducting waves to account for any profile skews within the panel. Demographic weights were then applied to correct for imbalances in the achieved sample.

The Ipsos team conducted stakeholder interviews to help feed into the design of the questionnaire. This included the Advertising Standards Authority (ASA), the Internet Advertising Bureau (IAB), other government departments (including DSIT and the Home Office) and academics with relevant experience and expertise. As part of the questionnaire development, cognitive testing of specific questions in the survey took place between 11-23 March 2024. A total of 10 interviews were completed, following sampling criteria that took region, gender, age, internet usage and presence of children in the household into account.

Fieldwork for the survey was conducted between 4-10 April 2024 with adults aged 16+ within the United Kingdom. In total, 8,511 responses were achieved, including 1,777 parents of children aged 2-15 (who were asked questions about their children's use of the internet).

2.2 How to interpret results

Any differences between groups referenced within this report are statistically significant, unless otherwise indicated.

Whilst the survey included relevant definitions and prompts, results around exposure to potentially illegal or misleading advertising are based on respondents' personal recall of what they have seen and their own interpretation of what is potentially misleading and what might constitute illegal products/services. Similarly, recall of seeing these adverts does not necessarily constitute exposure to harm; the survey captures respondents' perceptions around the extent to which seeing advertising that they felt was misleading or was perceived to promote an illegal product/service had an impact on them, either emotionally, financially or in another way.

The information gathered from parents about their children's online activities and exposure is based on the perspective of the parent, which will not encompass the entirety of their child's online experience, nor necessarily reflect the viewpoint of their children regarding interactions with potentially harmful adverts. These responses from parents will also be subject to recall bias in terms of the types of online content

that parents remember and the extent to which they accurately attribute their child's exposure to this content. Some of the responses from parents highlight the likely inaccuracies within their views of what their children have been exposed to via online advertising.

With these caveats, the survey results should not be interpreted as a fully accurate representation of what adults or children have been exposed to via online advertising. They do, however, provide a robust set of findings around what UK adults *perceive* they (and their children) may have seen whilst online.

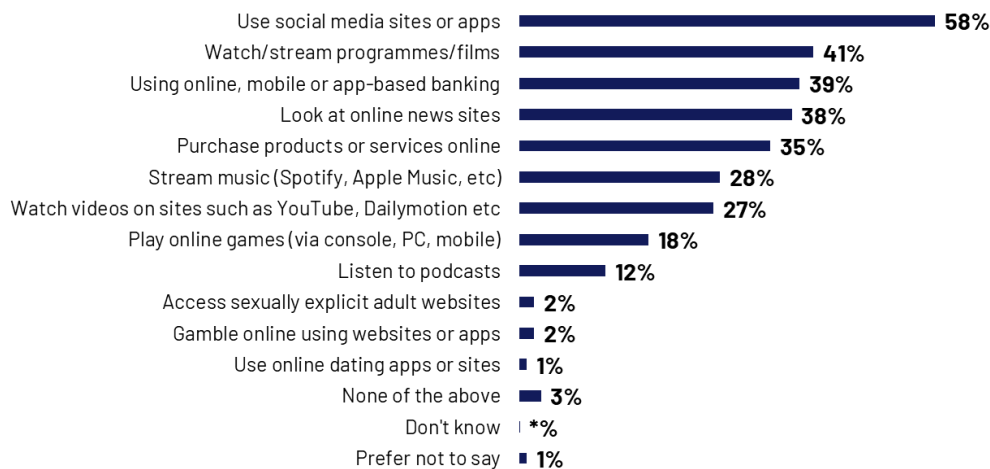
3 Experiences and concerns when online

Before respondents were asked whether they recalled seeing/hearing online adverts that they perceived to be misleading or promoting products/services that they deemed to be illegal, they were first asked some broader questions about internet usage and attitudes to online security. This provides useful context for later findings in the report around exposure to specific types of online advertising, and also provided the opportunity within the survey for respondents to become familiarised with relevant topics.

3.1 Most frequent online activities

Over half of respondents noted spending the most amount of their time online using social media sites or apps (58%), making it the most popular online activity of those listed in the survey (see Figure 3.1 – note that this list did not include work-related activities). Social media use was most prevalent among the younger age groups, with 70% of those aged 16-34 selecting social media as one of their most frequent online activities, compared to 63% of those aged 35-54 and 43% of those aged 55+. Figure 3.1 outlines the proportions overall selecting each online activity as what they spend the most amount of time doing when online (respondents could select up to four activities).

Figure 3.1: Most frequent online activities



WEBUSE. Which of the following, if any, would you say you spend the most amount of time doing when you are online?

Base: All UK adults, age 16+(n8511)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

Younger age groups were comparatively more likely than older respondents to highlight the following as being amongst their most frequent online activities:

- Using social media sites (selected by 70% of 16–34-year-olds, compared to 43% of 55+ year olds)
- Streaming programmes/films (53%, compared to 27%)
- Streaming music (48%, compared to 13%)
- Watching videos (39%, compared to 17%).

In contrast, older respondents were comparatively more likely to select the following as amongst their most frequent activities when online:

- Using mobile or app-based banking (selected by 50% of 55+ year olds, compared to 24% of 16-34s)
- Looking at online news sites (54%, compared to 17%)
- Purchasing products or services online (49%, compared to 16%).

3.2 Broad attitudes towards online safety

Regarding online safety in the broadest terms (and covering all types of online content), the majority of people surveyed felt they have some control to avoid seeing harmful or offensive online content; when asked which of a pair of statements was closest to their own view, the majority felt that steps can be taken to avoid harmful content online:

- 78% selected “*using a bit of common sense when you are online usually prevents you from seeing harmful or offensive content*”, compared to
- 13% who selected “*it is impossible to avoid seeing harmful or offensive online content*”.

Across all sub-groups of the population, the majority selected the first option (i.e. harmful or offensive content can be avoided), though there are some variations in the extent to which it is selected. Older age groups were particularly likely to feel that harmful or offensive content could be avoided; 86% of 55+ year olds selected the first option, compared to 66% of 16–34-year-olds.

Frequent internet users and those who use security measures online were also more likely to select the first option above (81% of those who use some security measures online, compared to 69% of those who use none).

Those who went on to say that they have definitely seen an online advert that they consider to be for an illegal product or service in the last 12 months were comparatively more likely to say that it is impossible to avoid seeing harmful or offensive content if you go online (20%, compared to 9% among those who do not recall having seen such an advert in the last 12 months).

The same pattern is apparent with regards to people who recalled having seen adverts that they feel are misleading, 19% of those who say they have seen an advert that they know to be misleading in the last 12 months agreed that it is impossible to avoid seeing harmful or offensive content online content, compared to 10% of those who had not seen any misleading advertisements.

Whilst the majority of respondents felt that using common sense can help to prevent exposure to harmful or offensive content, there is appetite for further online safety measures to be put in place. When asked to select from the following two broad statements regarding online safety in general (not related to specifically to advertising or any other particular aspect of online behaviour), most people supported additional measures:

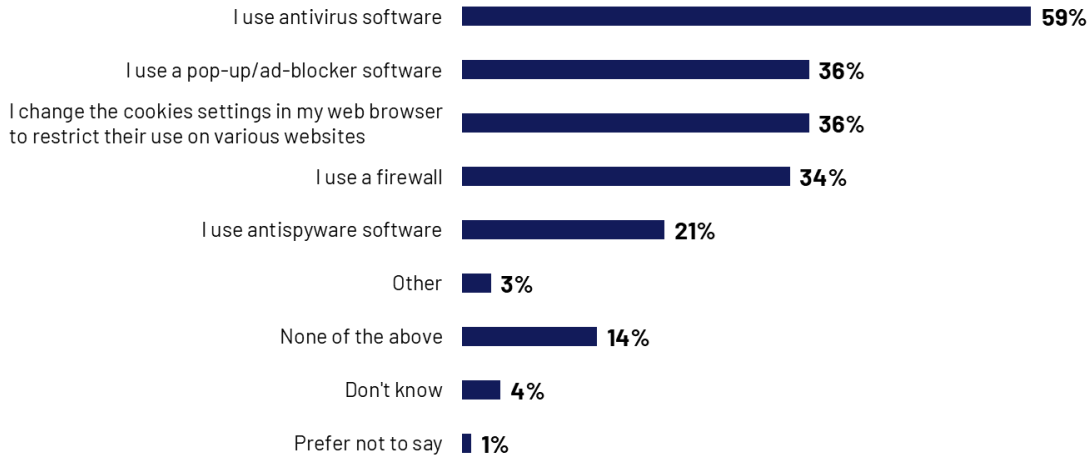
- 62% selected “*there should be more online safety measures in place*”, compared to
- 25% who selected “*there are enough online safety measures in place*”.

The majority of people across different demographic groups selected the first of these options (i.e. there should be more safety measures in place). Older age groups, in particular, cited a preference for further online safety measures being put in place, with 69% of participants aged 55+ selecting this option, compared to 54% of 16–34-year-olds.

3.3 Steps taken for online protection

Figure 3.2. outlines the online safety features used by respondents. Around four in five (81%) use at least some form of online protection, with antivirus software the most frequently used (59%).

Figure 3.2: Proportions taking different forms of online protection



SECURITY. When considering online safety features, which, if any, of the following applies to you?

Base: All UK adults, age 16+ (n8511)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

Online security measures were generally more likely to be used by men (more likely than women), those in higher household income brackets and those who use the internet more frequently.

The figures for these audiences are shown against the overall totals Table 3.1 below.

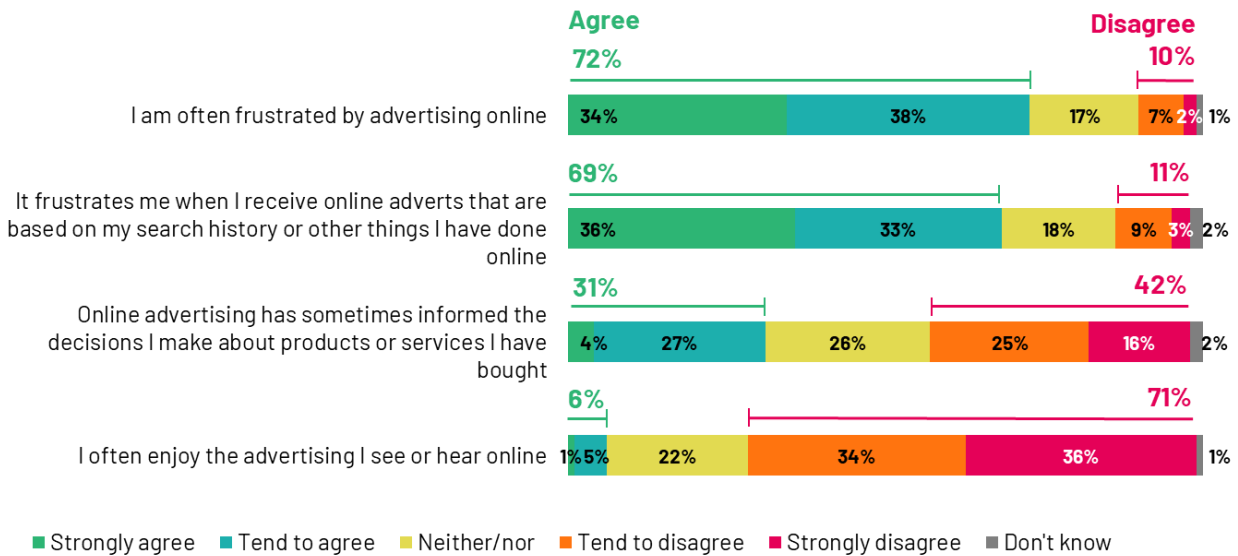
Table 3.1: Use of online protection measures by demographics

	Total	Men	Annual HH income £52,000+	Daily internet users
I use an antivirus software	59%	64%	61%	60%
I use a pop-up/ad-blocker software	36%	43%	43%	37%
I change the cookie settings on my web browser to restrict their use on various websites	36%	39%	40%	37%
I use a firewall	34%	43%	38%	35%
I use an antispyware software	21%	28%	25%	21%

3.4 Broad attitudes towards online advertising

Figure 3.3 shows the overall proportions of respondents who agree or disagree with different statements regarding online advertising in general.

Figure 3.3: Attitudes towards online advertising



ONLINEADSATTITUDES. Thinking about advertisements you may see or hear when you are online, to what extent, if at all, do you agree or disagree with the following?
 Base: All UK adults, age 16+ (n8511)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

Almost three-quarters of respondents agreed (either tended to agree or strongly agreed) that they are often frustrated by advertising online (72%), with 34% strongly agreeing. A similar proportion overall agreed that they are frustrated when receiving online adverts that are based on their search history or other things they have done online (69% agreeing, 36% overall strongly agreeing).

Those who use forms of online security or pop-up/ad blockers were more likely to strongly agree that they are frustrated by advertising online (36% and 39% respectively, in comparison to 34% overall).

Older people aged 55+ were more likely to express frustration with targeted adverts based on their search history/other online activity, with 43% of 55+ year-olds strongly agreeing this frustrates them. The youngest age group – those aged 16-24 - were significantly less likely than older age groups to express frustration with receiving targeted adverts (22% strongly agreed that this frustrates them).

Opinion is divided on the extent to which online advertising has informed purchasing decisions. Around three in ten (31%) agreed that online advertising has sometimes informed their decision (though only 4% strongly agreed), whilst around four in ten (42%) disagreed, including 16% who strongly disagreed. One in four overall (26%) neither agreed nor disagreed. Those aged 16-34 were comparatively more likely to agree that online advertising had informed their decisions (41%; compared to 31% of them who disagreed).

A small minority agreed that they often enjoy the advertising they see or hear online (6%). Levels of disagreement were most prominent amongst older age groups (43% of those aged 55+ strongly disagreed) and those who use some type of online security or pop-up/ad blockers (38% and 40% respectively).

3.5 Concerns around online advertising and other factors online

When prompted with a list of potential concerns when using the internet – outlined in Figure 3.4 – 41% of all respondents selected at least one of the five categories relating specifically to online advertising within their top two or three concerns, with the proportions selecting each as follows:

- Targeted or personalised online advertising based on my online activity (selected by 14% of respondents as being within their top three concerns).
- The amount of online advertising (12%).
- Adverts for products or services which may not be appropriate to children (11%).
- Adverts for products or services that could be misleading (8%).
- Adverts for illegal products or services (4%).

More broadly, respondents were most likely to select scams, fraud, or phishing as a top concern when online (selected by 59% as being within their top three concerns), data collection without knowledge/permission (43%), and misinformation, i.e. false or misleading stories, claims or assertions e.g. ‘fake news’ (37%). Concerns relating to scams, fraud or phishing may relate to a range of activity online, potentially covering aspects of online advertising, though the survey did not go into further detail on this category.

Concern about scams, fraud or phishing and with collection of data without knowledge/permission increased with age, with those aged 55+ comparatively more likely to select each of them (69% selecting scams, fraud, or phishing, and 54% data collection without knowledge/permission).

Figure 3.4: Most prevalent concerns when using the internet



CONCERNS. Which two or three, if any, are you personally most concerned about?

Base: All UK adults, age 16+ (n8511)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

Around one in five respondents overall (21%) selected either adverts for products or services which may not be appropriate to children, adverts for products or services that could be misleading, and/or adverts for illegal products or services within their top concerns.

These respondents were asked to describe in their own words the concerns they had about these adverts. The most frequent mentions were inappropriate advertising seen by/aimed at children, false/misleading advertising, and scams, fraud, or phishing. Concern about inappropriate advertising seen by/aimed at children was specifically mentioned more often by parents than those who are not a parent.

Some examples of respondent concerns are as follows, illustrating the breadth of concerns that people have, including the potential overlap with ‘other’ categories of concern within the question above, including scams, fraud and phishing:

“Advertising that is not appropriate for children being viewed by children. Targeting teenagers or children with messages that are hurtful or inappropriate, or that bolster self-criticism.” – Female, 41

“Online advertising can promote products that are sold with the pure intention of scamming money and never delivering the goods” – Female, 51

“Unauthorised merchandise worries me, which maybe scam/phishing” – Male, 58

“My concerns mainly involve children, them seeing pornographic content/body shaming/violence” – Female, 21

“Kids being marketed addictive products or products that aren't appropriate e.g. vapes” – Female, 19

4 Recall of exposure to perceived illegal online advertising and its impact

This chapter focuses on perceived illegal online advertising, including how frequently respondents recall seeing them and the perceived impact of being exposed to them. This covers five types of illegal advertisements:

1. Advertises facilitating illegal activities,
2. Advertises for illegal products,
3. Advertises promoting counterfeit products,
4. Advertises for illegal services such as those related to the sex trade or illegal healthcare, and
5. Advertises for illegal services such as unregistered clinics offering cosmetic procedures.

4.1 Recall of perceived illegal online advertising

Before being asked about their recollection of seeing/hearing online advertising that they might have perceived as being illegal, respondents were presented with the following information to help frame the issue and ensure consistency across interviews:

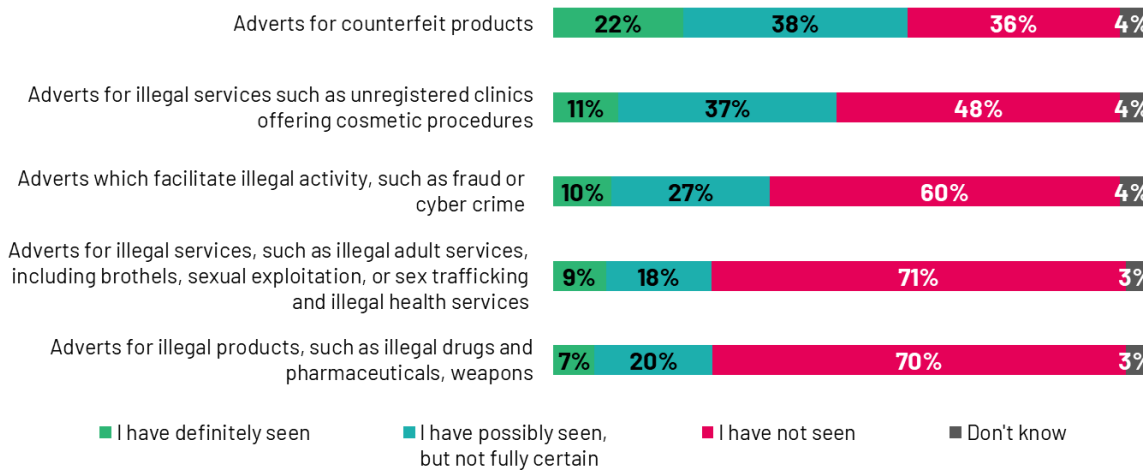
Illegal online advertising is when a company or person uses the internet to promote activities, products, or services that are against the law. This could include advertising for services that facilitate illegal activities like human trafficking or cyber scams, promoting illegal items such as drugs, unauthorised medications, weapons, or fake products, or offering services that are not allowed by law.

Have you ever seen any advertisement online for the following types of illegal goods or services?

Whilst respondents were prompted with this information, when answering questions about potentially illegal advertising their responses will be based on personal recall of what they have seen and their own interpretation of what might constitute illegal products/services. This is a complex subject matter, and responses will likely often be based on respondents' best guesses at what might constitute illegal activity. Findings will therefore reflect public perceptions rather than accurate measures of genuine exposure to online advertising for illegal products/services.

The proportions saying they had ever seen each of the following types of illegal adverts are shown in figure 4.1, with the high proportions of those saying they had *possibly* seen such adverts likely reflecting a lack of certainty in people's recall and potential confusion that exists amongst many with regards to the (il)legality of some products/services they perceive to have seen advertised online.

Figure 4.1: Perceived recall of having ever seen advertising for different categories of illegal products/services



ILLEGALAD_A. Have you ever seen any advertisement online for the following types of illegal goods or services?

Base: All UK adults, age 16+ (n8511)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

The proportions of all respondents who say they have definitely ever seen adverts in the different categories of perceived illegal products/services were as follows:

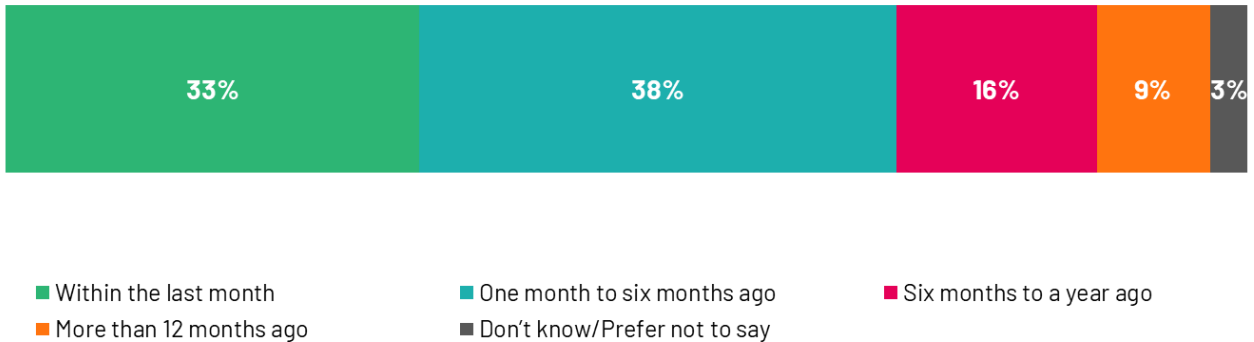
- 17% said they had definitely seen an advert in one category only (i.e. one of the five types of goods/services covered in Figure 4.1)
- 9% said they had definitely seen an advert in two categories.
- 4% said they had definitely seen an advert in three categories.
- 2% said they had definitely seen an advert in four categories.
- 1% said they had definitely seen an advert in all five categories.

In total, 73% said they had either *definitely* ever seen or had *possibly* ever seen at least one advert for one of the types of illegal product/service listed within the survey.

This falls significantly to around a third overall (32%) who said that they had *definitely* seen at least one type of illegal online advertising at some point, with 28% overall saying they had definitely seen at least one within the past year, 22% overall saying they had definitely seen within the past six months and 10% overall saying they had definitely seen within the past month.

For the purposes of this research, the figures focus on those who say they definitely saw an ad they perceive to be illegal within the last 12 months (unless otherwise noted). Amongst those that believe they definitely have seen what they perceive to have been an illegal add, a third (33%) saw such an ad in the last month, 38% said between a month and six months ago, 16% between six and 12 months ago, and 9% more than a year ago.

Figure 4.2: When last seen perceived illegal advertising



ILLEGALAD.B. And how many times would you say you have seen an advertisement online that you would consider to be for an illegal product or service in the past 12 months?

Base 1: All UK adults, age 16+ who say they have definitely seen at least one form of illegal online advertising (n2607)

ILLEGALAD.C. Think about the last time that you saw an advertisement online that you considered to be for an illegal product or service. How long ago would you say that you saw this advertisement?

Base 2: All UK adults, age 16+ who say they have definitely seen at least one form of illegal advertisement in the past 12 months (n2253)

Fieldwork dates: 4-10 April 2024
Source: Ipsos

Counterfeit products

Just over one in five (22%) reported they had definitely seen an advert that they believed to be for a counterfeit product, and a further 38% said they had possibly done so. Just over a third said they had not seen an online advert for any perceived counterfeit products (36%). See figure 4.1 for more information on how this compares with perceived recall of different categories of illegal products or services.

Men were more likely than women to say they had definitely seen an illegal advert for what they perceived were counterfeit goods (26% vs 18%), whilst younger people were more likely than older age groups (32% of those aged 16-34 compared with 24% of those aged 35-54 and 13% aged 55+). Those within the highest household income bracket (£100,000 and above) were also more likely to say they had definitely seen adverts for perceived counterfeit goods online (31% vs. 22% overall).

Illegal services

Around one in ten respondents (11%) said they have definitely seen adverts for what they perceived were illegal services such as unregistered clinics offering cosmetic procedures, while a further 37% reported possibly seeing one. Almost half (48%) said they had not seen an advert of this type. Figure 4.1 outlines how this compares with perceived recall of different categories of illegal products or services.

Those aged 16-34 (15%) were more likely to note having seen adverts for these perceived illegal services online than those aged 35-54 (12%) or aged 55+ (7%).

Illegal activity

One in ten (10%) respondents reported they had definitely seen an advert facilitating perceived illegal activity such as fraud or cyber-crime, and a quarter (27%) said they had possibly seen an advert of this type. Three in five (60%) said they had not seen an advert for such illegal activity.

Men were almost twice as likely as women to say they had seen an online advert facilitating what they perceived to be these types of illegal activity (13% vs 7%). Respondents aged 16-34 were twice as likely to report having seen this type of advert than those aged 55+ (13% vs 6%).

Illegal adult services

Just under one in ten respondents (9%) noted that they had definitely seen an advert for what they perceived to be illegal services such as illegal adult services, including brothels, sexual exploitation, sex trafficking or illegal health services. A further 18% said they had possibly seen an advert of this type, while seven in ten (71%) had not seen any.

Men were almost twice as likely as women to say that they had definitely seen advertisements for perceived illegal adult services online (11% vs 6%). Again, younger respondents were also comparatively more likely to note having definitely seen an advert of this type (12% of 16–34-year-olds, compared to 9% of 35-54s and 6% of those aged 55+).

Illegal products

Overall, 7% of respondents said they recall having definitely seen an advert that they perceived to be for illegal products such as illegal drugs and pharmaceuticals and a further 20% said they had possibly seen one. Seven in ten (70%) noted they had not seen any adverts for these products online. This is the category of illegal products or services least likely to be cited, as illustrated in figure 4.1.

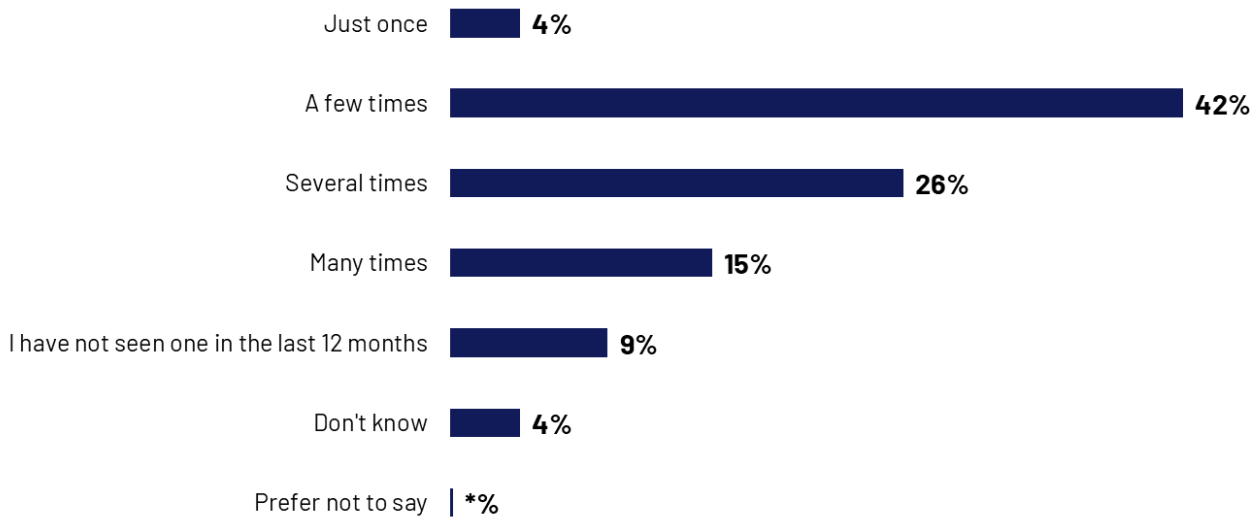
Men were twice as likely as women to recall having definitely seen adverts for illegal products (10% vs 5%), whilst younger age groups were again more likely than older respondents (10% of those aged 16-34, compared with 8% of those aged 35-54 and 4% aged 55+).

4.2 Frequency of seeing perceived illegal online adverts

Among those who said that they had definitely seen what they perceived to be an illegal online advert, just over eight in ten (82%) said that they had seen such adverts more than once within the last 12 months, with 15% saying they had seen them 'many times' and 26% having seen them 'several times' (42% said they saw them a 'few times' while 4% said they had seen them just once).

Men were more likely than women to say they had seen illegal advertising online many times within the past year (17%, compared to 12%).

Figure 4.3: Frequency of seeing illegal online advertising within the past 12 months

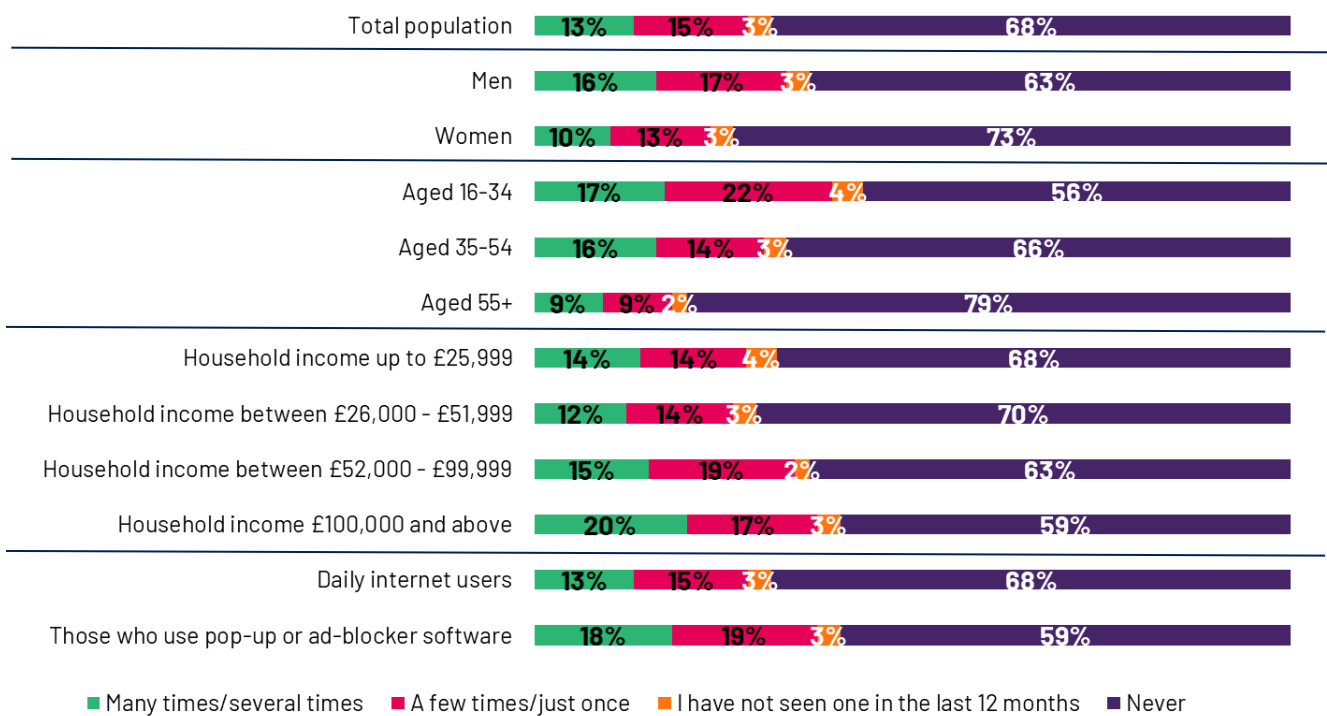


ILLEGALAD_B. And how many times would you say you have seen an advertisement online that you would consider to be for an illegal product or service in the past 12 months?

Base: All UK adults, age 16+ who say they have definitely seen at least one form of illegal online advertising (n2607)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

Figure 4.4 below provides an overview of the stated frequency of seeing perceived illegal online advertising broken down by socio-demographic sub-groups.

Figure 4.4: Frequency of seeing illegal online advertising – by sub-group



ILLEGALAD_B. And how many times would you say you have seen an advertisement online that you would consider to be for an illegal product or service in the past 12 months?

Base: All UK adults, age 16+(n8511)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

4.3 Where seen perceived illegal online adverts

Respondents were asked to choose from a list of eight options about what type of site or service they were using when they last saw what they perceived to be an illegal advert online, the most frequently cited were social media websites or apps (cited by 58% of those who said they had definitely seen a perceived illegal advertisement within the last 12 months). To some extent this may reflect online behaviour more generally, with use of social media being the most frequent online activity (see section 3.1).

Beyond social media, other sites/services where perceived illegal advertisements were cited as being seen include search engines (14%), shopping websites or apps (12%) and adult sites (7%).²

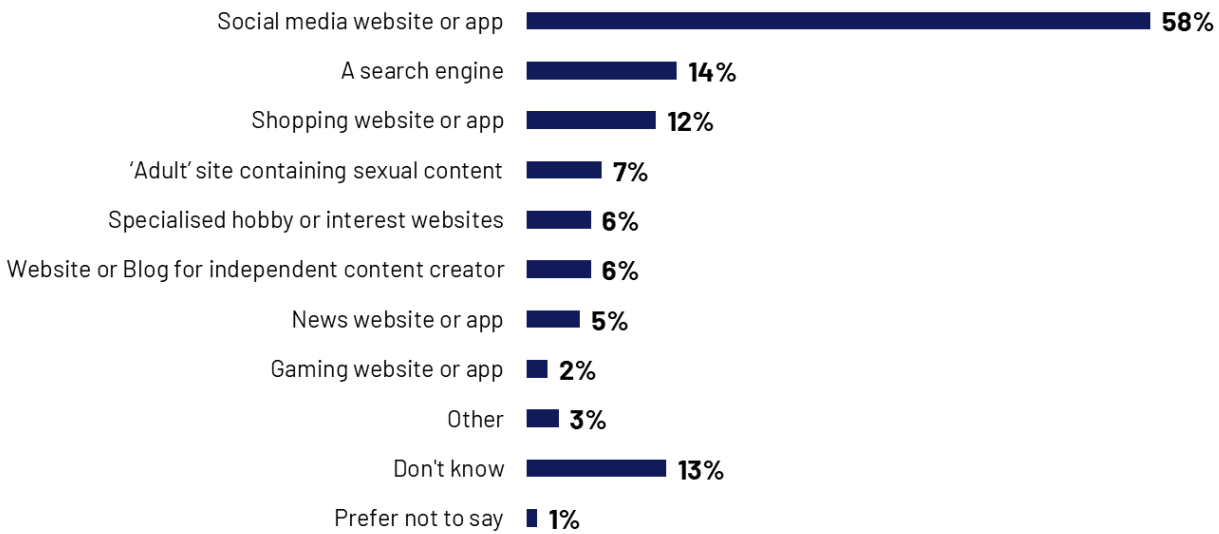
Women were more likely than men to say they most recently saw the perceived illegal online advertisement on social media (62% compared to 55%, which may reflect overall internet usage patterns since women are more likely than men to cite social media usage as a main online activity), while men were more likely than women to say they saw this most recent advert on a search engine (16% vs 11% of women).

Those aged 55+ were more likely than those in younger age groups to say they saw a perceived illegal advertisement most recently on a shopping website (15% compared to 10% of 16-54s), which, again, is likely to reflect activities generally undertaken online (as outlined in section 3.1 older respondents were comparatively more likely to cite spending time shopping when online).

Groups who were more likely than others to say they had seen a perceived illegal advertisement on an adult site include men (10%) and those aged 16-34 (10%).

² It is worth noting that ads seen on a shopping website or app are potentially more likely to be an ad for a product sold on that particular website rather than a third-party product. This type of ad would not technically be considered a paid-for ad, however, some respondents may have potentially considered it as such.

Figure 4.5: Where last saw a perceived illegal advertisement online



ILLEGALADSITE. Still thinking about the last time you saw an advertisement online that you considered to be for an illegal product or service, what type of site or service were you using when you saw this advertisement?

Base: All UK adults, age 16+ who say they have definitely seen at least one form of illegal advertisement in the past 12 months (n2253)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

4.4 What people recall seeing

When asked to describe in their own words through an open-ended question on what the most recently seen perceived illegal advert was or what it was advertising, the most common responses cited counterfeit clothing (8%), sexual services (7%), counterfeit goods more generally (7%) and/or drugs or medication (6%).

Below are some examples of what was said:

“I was annoyed. I realised it was fake perfume, but many others wouldn't. It's unfair in businesses, and the person buying it.” – Female, 43

“On TikTok there are adverts for products used for smoking weed which are disguised as other products through vague language and funny music. It makes me feel worried that younger people will see drugs as something silly and fun and not take the threat seriously.” – Female, 18

“The advert said a free app available, which has the backing of several big finance companies. It promised a 4-6 times return with guaranteed safety of money invested. Curious, when I tried to look into it, it turns out to be a data harvesting website.”- Male, 60

‘Angry that they were so openly and blatantly advertising illegal drugs on a very large social media site with no fear of punishment’ – Male, 39

‘Fitness and quick fix programmes, drugs and diets’ – Male, 47

‘I am aware that these types of pills and drugs are a scam and will not work. It made me feel bad as I know that many people will click on it and not be aware of what is actually in these pills and the health consequences’ – Female, 17

4.5 The impact of seeing perceived illegal advertising online

Impacts on mental health

When asked to what extent, if at all, did seeing this advertising that you considered to be for an illegal product or service make you feel stressed, anxious or had any other impact on your mental health (selecting from a scale ranging from “to a great extent” to “not at all”), a quarter (25%) of those who said they had definitely seen a perceived illegal advertisement online in the past 12 months noted that it made them feel stressed, anxious or had some other impact on their mental health, at least to some extent (3% to a great extent and 21% to some extent). This equates to 7% of all those surveyed.

Around three-quarters (73%) of those who said they had definitely seen such an advert said it had hardly any impact or no impact at all (45% said it had no impact at all).

Women were more likely than men to say that seeing a perceived illegal advert had made them feel stressed, anxious or had some other impact on their mental health, at least to some extent (30% vs. 20%). Those living in a lower income household (earning below £26,000) were comparatively more likely to note that they were impacted, at least to some extent (33%, compared with 25% overall).

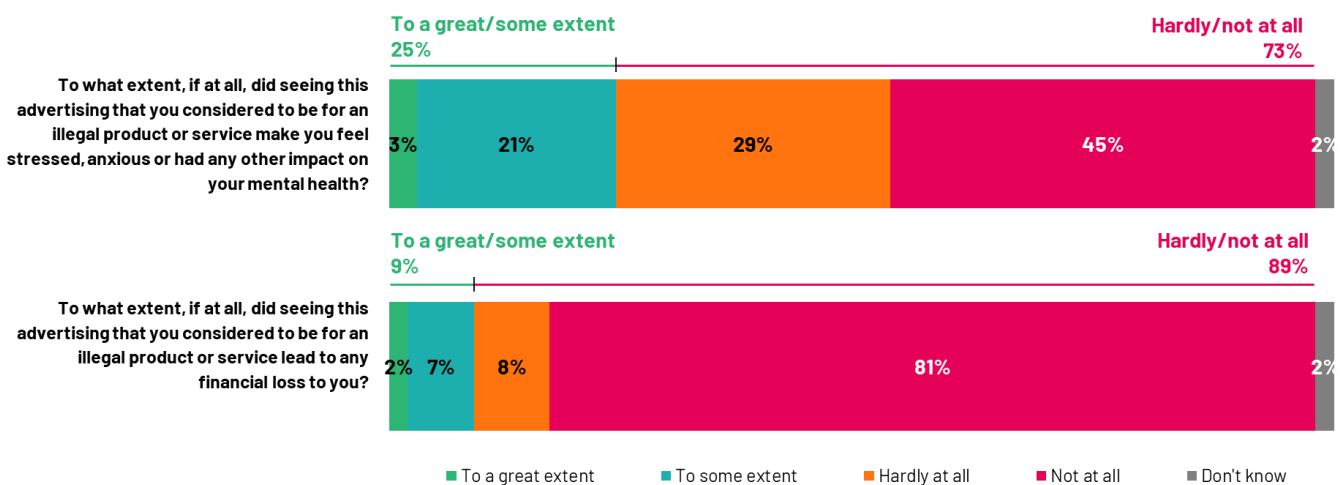
Financial impacts

Fewer people noted that seeing a perceived illegal advertisement online in the past 12 months had a financial impact than an emotional impact.

When asked to what extent, if at all, did seeing this advertising that you considered to be for an illegal product or service lead to any financial loss to you (using the same scale as above), around one in ten of those who said they had definitely seen such an advert (9%) cited having suffered some financial loss as a result (2% saying it had impacted them to a great extent and 7% to some extent). This equates to 3% of all those surveyed.

Those on lower household incomes (below £26,000 per year) were comparatively more likely to say they were financially impacted (16%, compared to 6% with household incomes of £52,000+ per year).

Figure 4.6: Impacts on seeing perceived illegal advertising online in the past year



Base: All UK adults, age 16+ who say they have definitely seen at least one form of illegal advertisement in the past 12 months (n2253)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

5 Recall of exposure to perceived misleading online advertising and its impact

This section covers the likelihood of respondents having seen online advertising that they perceive to have been misleading. It outlines which demographic groups are more or less likely to report having seen such adverts and the extent to which they report having experienced emotional and financial impacts as a result.

5.1 Recall of perceived misleading online advertising

Before being asked about their recollection of seeing/hearing adverts that they perceived to be misleading, respondents were presented with the following information to help frame the issue and ensure consistency across responses:

Misleading advertising is, more often than not, difficult for a consumer to identify unless they have responded to the ad, purchased or otherwise have experience of the advertised product, service or activity.

Misleading online advertising is when a company or individual uses the internet, knowingly or otherwise, to market false or deceptive information about a product, service, or activity. This could involve making exaggerated claims about a product's capabilities or hiding important information that is important for consumers, for example hidden costs that must be paid by the consumer.

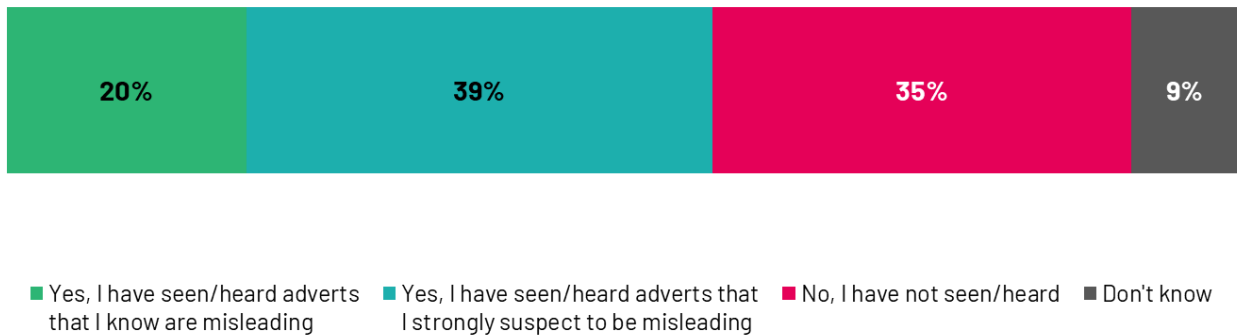
Have you ever seen any advertisement online that you know is misleading or strongly suspect to be misleading because of the inclusion or exclusion of claims, including claims that are visual?

Around six in ten respondents overall (59%) said that they thought they had ever seen an advert online that they either *knew* was misleading, or that they *strongly suspected* to be misleading.

This falls to one in five (20%) respondents overall who said they thought they had ever seen or heard online advertising that they *knew* was misleading, with a further 39% who said that they had seen online advertising that they strongly suspected was misleading. Just over a third (35%) said they had never seen any misleading online advertising.

Men were more likely than women to say they had seen an advert that they knew was misleading (24%, compared to 17%), whilst those in younger age groups were more likely than older respondents to say they recall having seen such adverts (28% of those aged 16-34, compared with 22% of those aged 35-54 and 14% of those aged 55+).

Figure 5.1: Recall of having ever seen perceived misleading online advertising



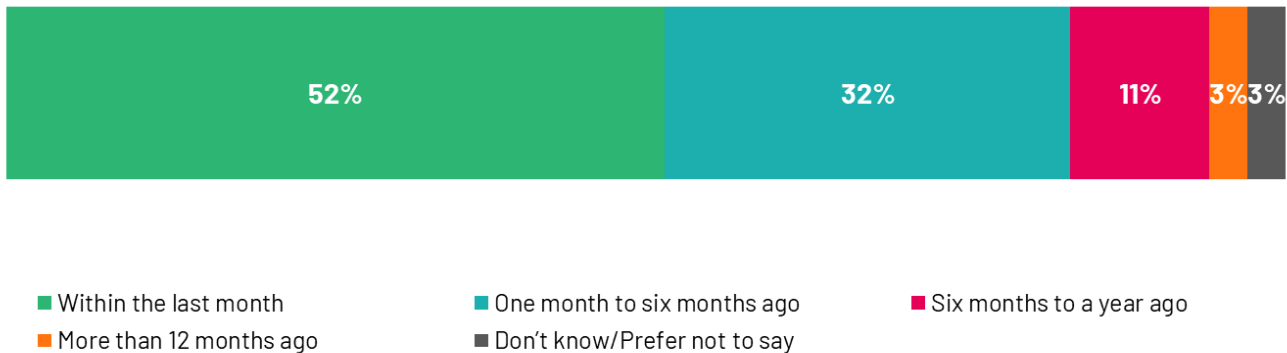
MISLEADAD_A. Have you ever seen any advertisement online that you know is misleading or strongly suspect to be misleading because of the inclusion or exclusion of claims, including claims that are visual?

Base: All UK adults, age 16+ (n8511)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

Those within the highest household income bracket (£100,000+ per year) were comparatively more likely to say they had seen a misleading advertisement online (30%, compared to 20% overall).

Almost all of those who said they had seen/heard online advertising that they *knew* was misleading had done so within the past year (19% of the overall sample), with 17% overall saying they had seen/heard such an advert in the past six months and 10% within the past month.

Figure 5.2: When last seen perceived misleading advertising



MISLEADAD_B. And how many times would you say you have seen an advertisement online that you knew or strongly suspected to be misleading in the past 12 months?

Base 1: All UK adults, age 16+ who say they have definitely seen at least one form of illegal online advertising (n1677)

MISLEADAD_C. Think about the last time that you saw an advertisement online that you knew or strongly suspected to be misleading. How long ago would you say that you saw this advertisement? If you are unsure, please provide your best estimate.

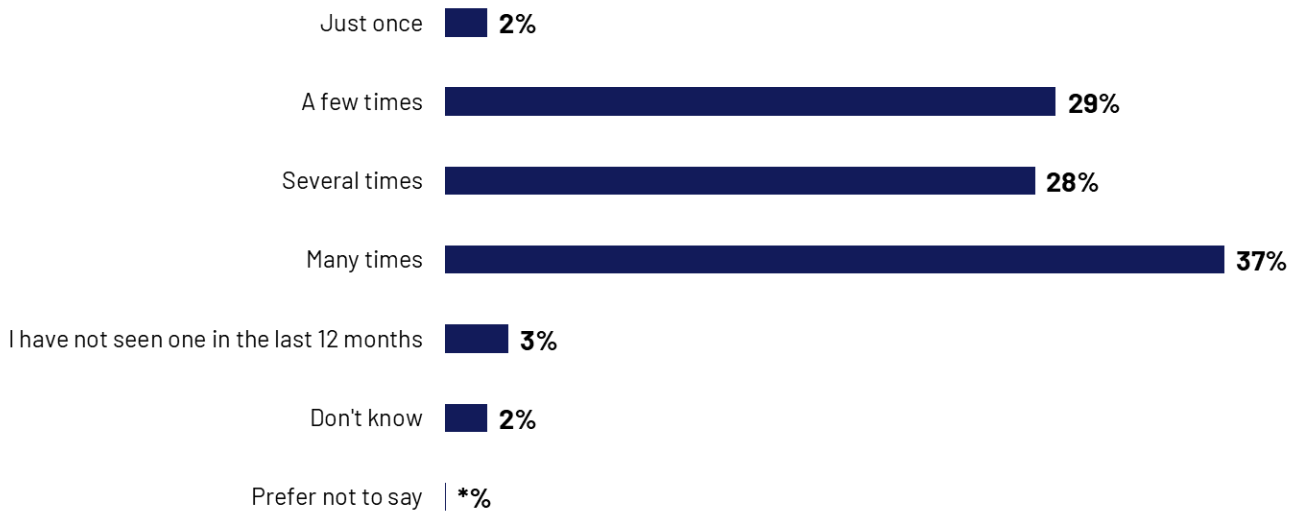
Base 2: All UK adults, age 16+ who say they have definitely seen online advertising they know to be misleading in the past 12 months (n1603)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

Among those who said they definitely saw an ad they perceived to be misleading, more than half (52%) said it was within the last month while a third (32%) said it was between a month and six months ago. Just over one in ten (11%) said it was between six months and a year ago while 3% said it was over a year ago.

5.2 Frequency of seeing perceived misleading online adverts

Among those who said that they had seen online advertising that they knew was misleading, over nine in ten noted having seen perceived misleading adverts more than once within the past 12 months (93%), with 37% having seen them *many times*.

Figure 5.3: Frequency of seeing perceived misleading advertising within past 12 months



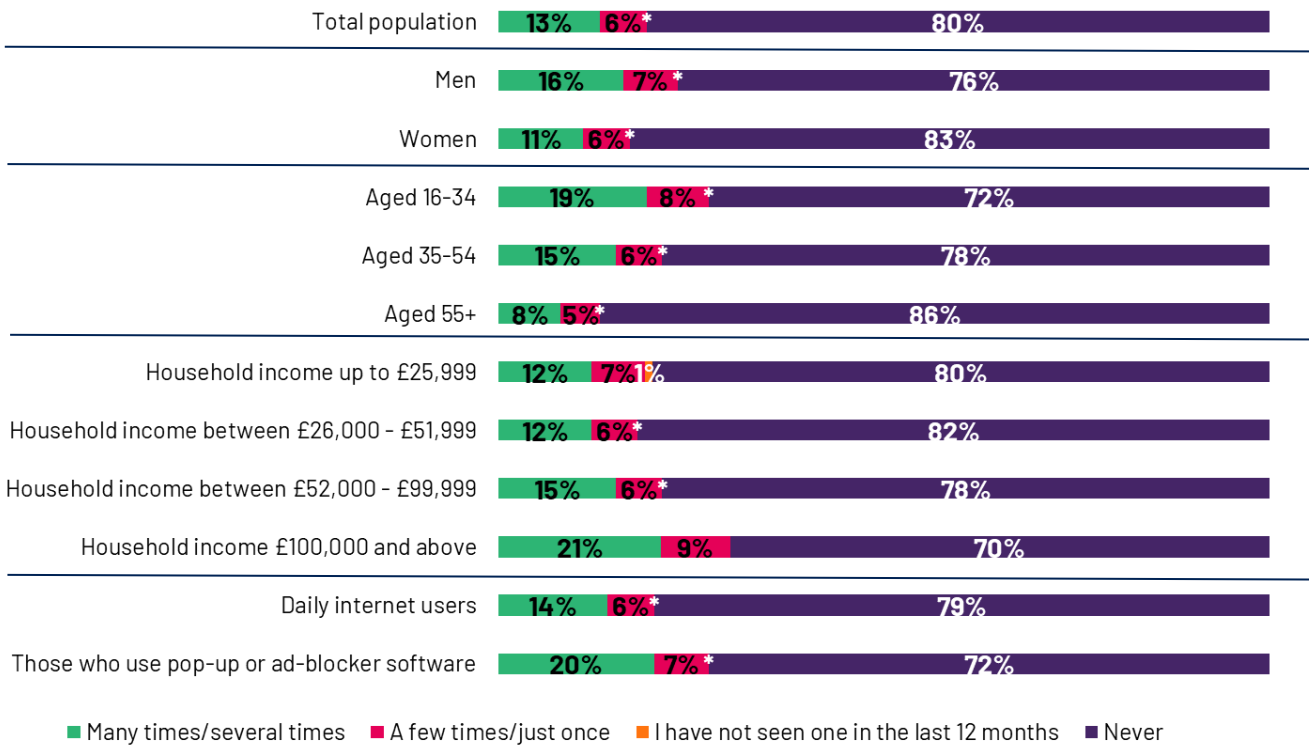
MISLEADAD_B. And how many times would you say you have seen an advertisement online that you knew or strongly suspected to be misleading in the past 12 months?

Base: All UK adults, age 16+ who say they have definitely seen online advertising they know to be misleading (n1677)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

Men were more likely than women to say they had seen misleading advertising many times (40%, compared to 33%), whilst younger and middle-aged respondents were more likely than those in the older age groups to have seen misleading adverts many times (41% of both 16-24 and 35-54 year olds, compared with 27% of those aged 55+).

Figure 5.4 below provides an overview of the stated frequency of seeing perceived misleading online advertising broken down by socio-demographic sub-groups.

Figure 5.4: Frequency of seeing perceived misleading advertising – by sub-group



MISLEADAD_B. And how many times would you say you have seen an advertisement online that you knew or strongly suspected to be misleading in the past 12 months?

Base: All UK adults, age 16+ (n8511)

Fieldwork dates: 4-10 April 2024
Source: Ipsos

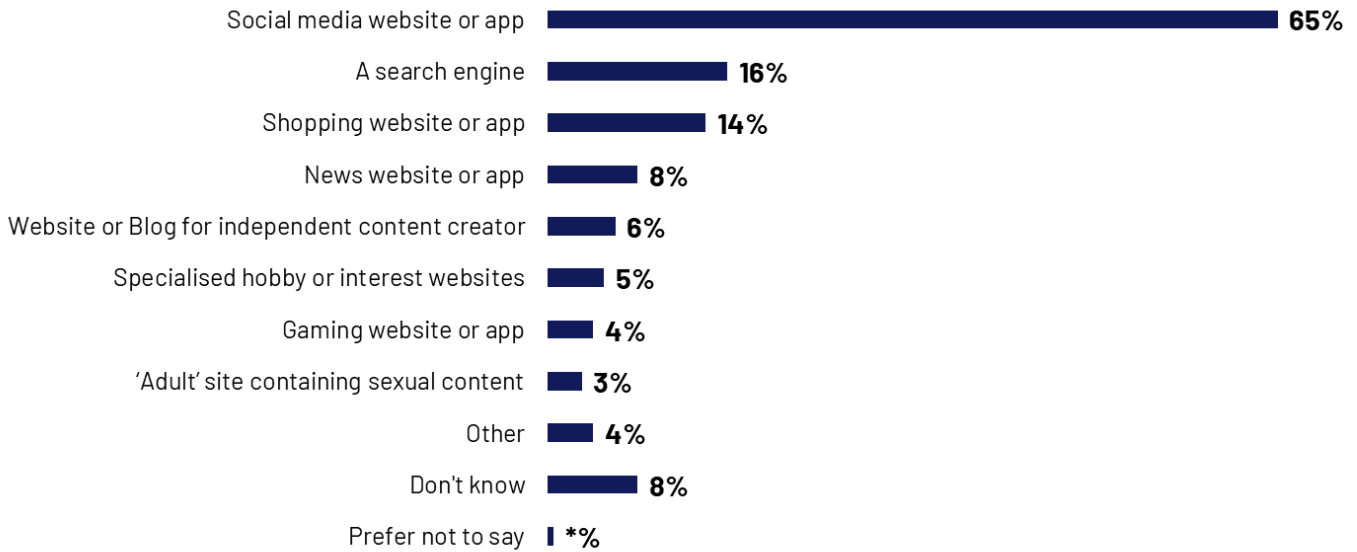
5.3 Where people recall seeing perceived misleading online adverts

Respondents were again asked to select from a list of eight options on where they recall seeing online advertising that they perceived to be misleading within the past year were most likely to cite having seen adverts on social media websites/apps (65% who saw a perceived misleading advertisement noted having seen it on social media). This may reflect broader online behaviours and familiarity with different sites/platforms (as outlined in section 3.1, using social media is the most prevalent online activity), though the gap between social media and other sites/services cited is significant.

Other sites/services where perceived misleading advertisements were noted as having been seen included search engines (16%), shopping websites/apps (14%) and news websites/apps (8%).

Younger age groups were particularly likely to say they last saw an advertisement that they perceived to be misleading on social media (70% of 18–34-year-olds), while those aged 55+ were comparatively more likely to say they saw it on a search engine (19%). These variations again reflect broader patterns of behaviour online across different age groups (see section 3.1).

Figure 5.5: Where respondents noted having last seen a perceived misleading advertisement online



MISLEADAD_SITE. Still thinking about the last time you saw an advertisement online that you knew or strongly suspected to be misleading. What type of site or service were you using when you saw this advertisement?

Base: All UK adults, age 16+ who say they have definitely seen online advertising they know to be misleading in the past 12 months (n1603)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

5.4 What people recall seeing

When respondents were asked to describe in their own words through an open-ended question about the most recent online advert that they said they knew to be misleading, there were no dominant types of products or services cited. Health and beauty products were the most likely to be mentioned, with 5% saying the advertisement was about a weight loss service or product, a further 5% saying it was about a more general health service, 4% noting it featured makeup or perfume and another 4% saying it was about beauty services in general. Below are some examples of what was mentioned:

“It was an advert on Facebook pretending to be a reputable UK shoe company. I purchased a pair of sandals which on arrival were not what appeared in the advert and were very poor quality. I lost £23 as they were unwearable. The seller was based in China.” – Female aged 75

“I see lots of hair and beauty products - I work in medical science and I know it isn't possible for the products advertised to achieve the results they claim.” – Female, 35

‘It was a Christmas tree decoration that looked 3D in the advert and turned out to be a flat piece of printed plastic’ – Male, 56

‘It was for a mini fan heater claiming to be cheap to run and quickly heat a room which was completely untrue after I investigated it.’ – Male, 72

‘Advertising a particular ride-on lawn mower with misleading 'facts' and also the reviews of several people suggested that it was a fraudulent advert’ – Female, 54

5.5 The impact of seeing perceived misleading advertising online

Impacts on mental health

When asked to what extent, if at all, did seeing this advertising that you knew or strongly suspected to be misleading make you feel stressed, anxious or had any other impact on your mental health (using a scale ranging from “to a great extent” to “not at all”), a quarter (24%) of those who recalled seeing an online advert in the past year that they knew to be misleading said that it made them feel stressed, anxious or had some other impact on their mental health (4% to a great extent and a further 20% to some extent). This equates to 5% of all those surveyed.

Around three-quarters (74%) noted that exposure to the perceived misleading advert had hardly any impact or none at all (49% said it had no impact at all).

Women were more likely than men to note that seeing the perceived misleading advertising had a negative impact on their mental health (28%, compared to 21% of men).

Those living in a lower income household (earning below £26,000 per year) were also comparatively more likely to note some negative impact on their mental health (37%, compared to 24% amongst all respondents).

In terms of those who had seen the perceived misleading advertising most recently, a quarter (25%) of those who said they had definitely seen a misleading advert in the past month noted that they had experienced some emotional impact (to a great extent/to some extent). This equates to 3% of all respondents.

Financial impacts

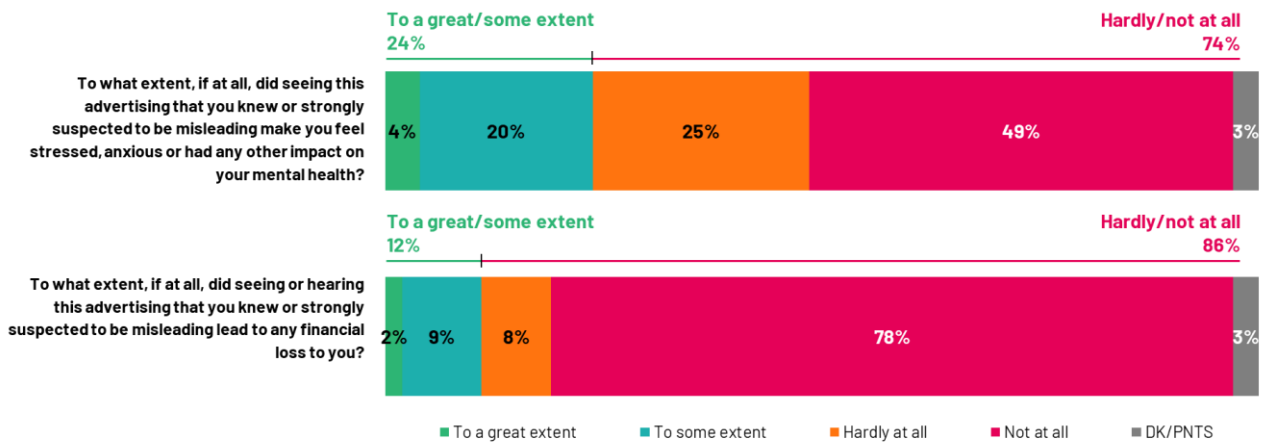
When asked to what extent, if at all, did seeing or hearing this advertising that you knew or strongly suspected to be misleading lead to any financial loss to you (using the same scale as above), around one in eight (12%) of those who said they recall seeing an advert online in the past year that they knew to be misleading noted that it had led to some personal financial loss (2% to a great extent and 9% to some extent).³ This equates to 2% of all those surveyed.

Those living in lower income households (below £26,000 per year) were comparatively more likely to cite some financial loss resulting from the misleading adverts (19%, compared to 9% of those living in households with an income of £52,000+ per year).

In terms of those who had seen the perceived misleading advertising most recently, just under one in ten (9%) of those who said they had definitely seen a misleading advert in the past month noted that seeing the advert(s) had a financial impact on them (to a great extent/to some extent). This equates to less than 1% of all respondents.

³ This adds to 12% due to decimal rounding.

Figure 5.6: Impact of seeing perceived misleading advertising online in the past year



Base: All UK adults, age 16+ who say they have definitely seen online advertising they know to be misleading in the past 12 months (n1603)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

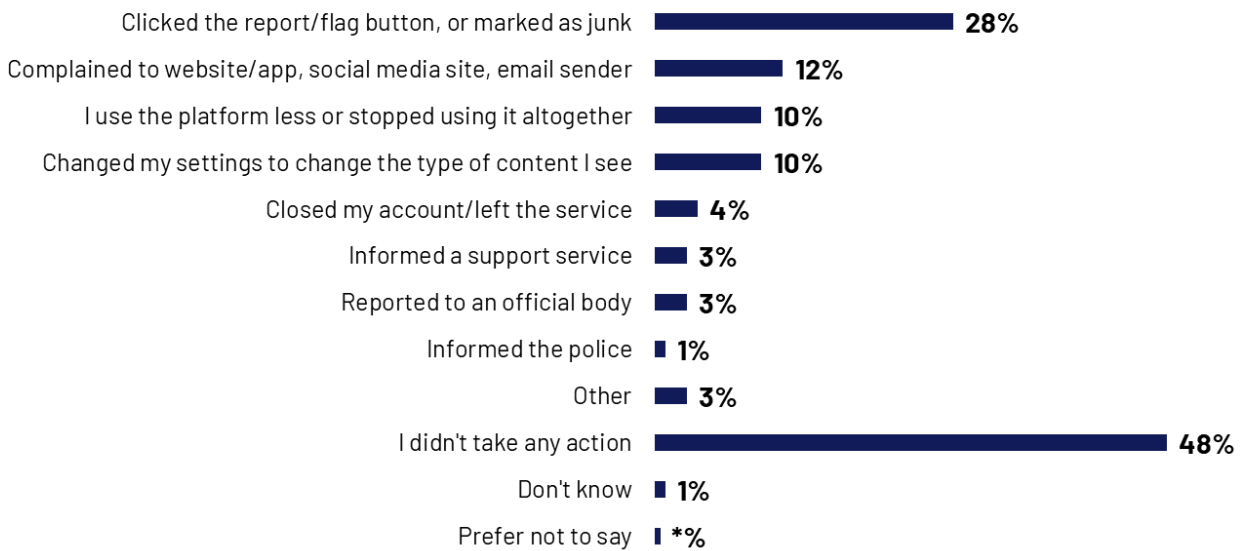
6 Actions taken when seen perceived illegal or misleading online advertising

This section covers findings around which actions, if any, individuals took when seeing advertising that they perceived to be illegal or misleading. This includes stated responses following the reporting of advertisements to relevant agencies/organisations, including levels of satisfaction with the reporting/complaints process.

6.1 Actions taken when seen perceived illegal online advertising

When asked about what action respondents took after seeing a perceived illegal online ad from a list of eight options, half of those who said they had definitely seen what they perceived to be illegal advertising online within the past 12 months went on to note that they took some form of action after seeing it (50%).

Figure 6.1: Action(s) taken when seeing perceived illegal advertising online



ACTIONTAKENA. And when you saw this most recent advertisement online that you considered to be for an illegal product or service, which actions, if any, did you take?

Base: All UK adults, age 16+ who say they have definitely seen at least one form of illegal advertisement in the past 12 months (n2253)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

The most likely action taken was clicking the report/flag button or marking the advertisement as junk (28% of those who recalled seeing perceived illegal online advertising in the past year noted that they did this). Other actions – typically requiring more time/effort – were cited by smaller proportions. Around one in eight (12%) noted that they complained to the relevant website/app, social media site or email sender, whilst one in ten said that they reduced their use of the website/app or stopped using it altogether (10%). A similar proportion reported changing their settings to prevent them from seeing such content (10%). Smaller proportions took other types of action, including 3% who said that they had

reported the most recent advert to an official body such as Ofcom, the Advertising Standards Authority (ASA) or Action Fraud.⁴

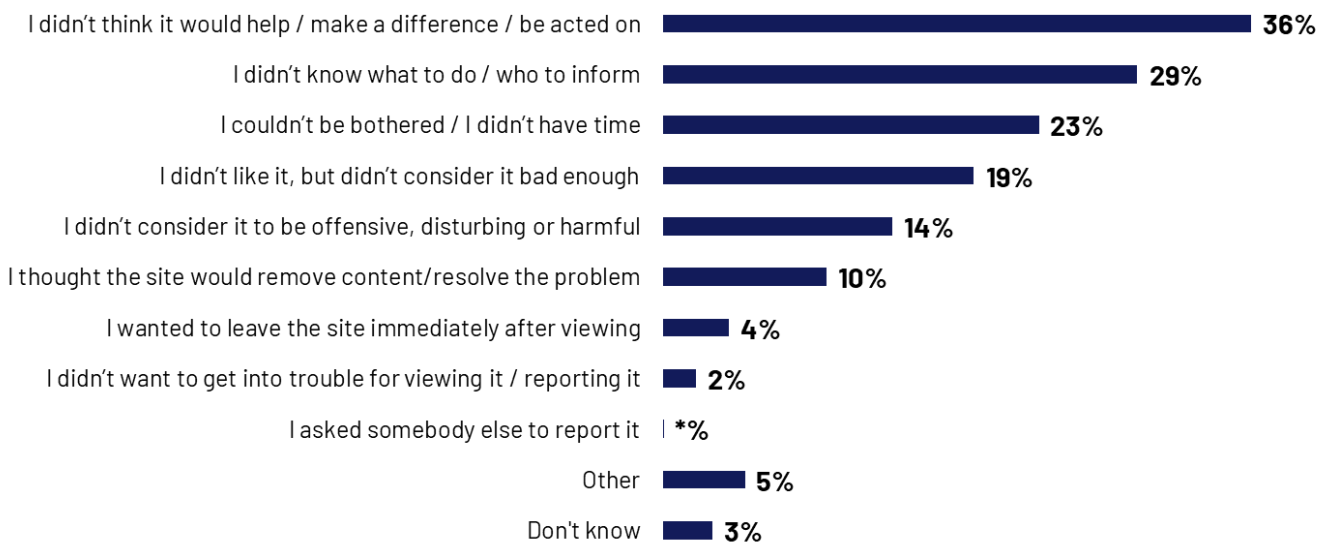
Older respondents were more likely than those in the younger and middle-aged groups to note having taken any action (58% of those aged 55+, compared to 47% of 16–34-year-olds and 49% of 35–54-year-olds). Those in lower income households (under £26,000 per year) were comparatively more likely to say they had taken some action (61%, compared with 44% of those with household incomes of £52,000+).

6.2 Reasons for not taking action after seeing perceived illegal online adverts

When those who noted they had not taken any action were asked *why not*, the most frequently cited reasons were the perception that it wouldn't have helped or made a difference (cited by 36% of those who didn't take any action after seeing an advert they considered to be for an illegal product/service), lack of awareness of what to do or who to inform (29%), and lack of motivation (23% noting that they could not be bothered or did not have time). Some respondents, however, cited they took no action because they did not consider the ad to be bad enough (19%) while 14% cited the ad wasn't offensive, disturbing or harmful.

Men were more likely than women to say that they did not report the illegal advertisement because they could not be bothered/didn't have the time (26%, compared to 18%), though were less likely than women to say that they did not know what to do or who to inform (26%, compared to 33%).

Figure 6.2: Reasons why no action taken regarding perceived illegal online advertising



OBARRIERSA. You noted that you did not take any action after you saw an advertisement online that you considered to be for an illegal product or service, why was this?

Base: All UK adults, age 16+ who took no action upon seeing an illegal advertisement (n1872)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

Younger people aged 18-34 were comparatively more likely to say that they could not be bothered/didn't have the time (31%), whilst older respondents (aged 55+) showed the same pattern of responses as the overall profile, with a perception that it would not make a difference being the most frequently cited

⁴ Ofcom, the Advertising Standards Authority (ASA) and Action Fraud were specifically mentioned within option shown to respondents.

barrier, followed by not knowing what to do/who to inform (cited by 34% and 26% of 55+ year olds respectively).

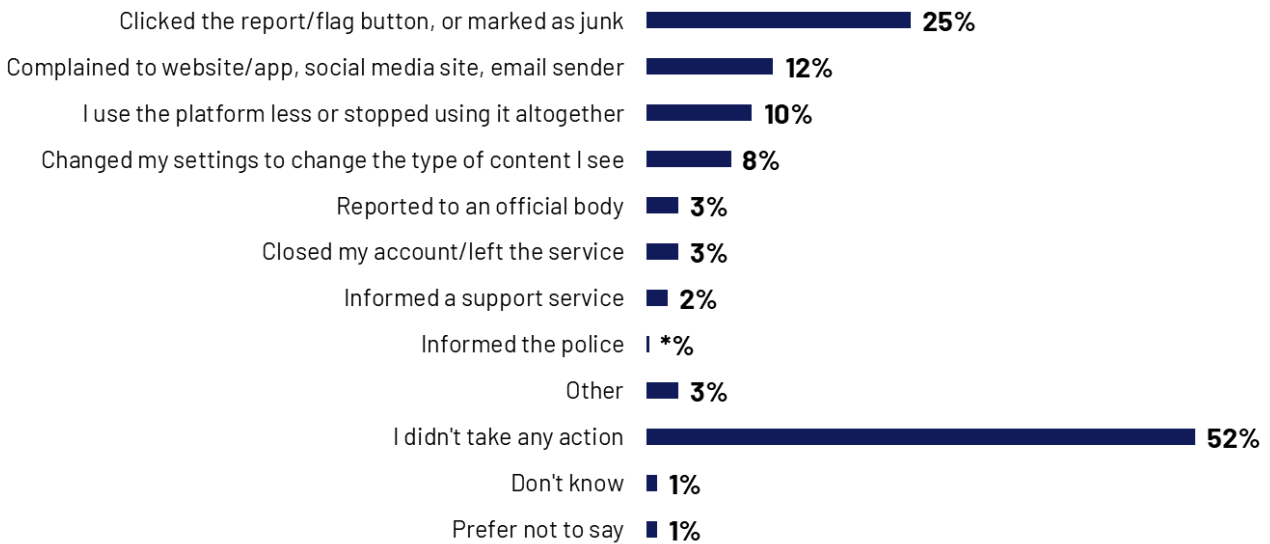
6.3 Actions taken after seeing perceived misleading online advertising

The pattern of specific actions taken by those who said they had seen online advertising within the past year that they knew to be misleading was very similar to that for perceived illegal adverts, with clicking the report/flag button or marking as junk, by some margin, the most likely action taken (by 25%).

A total of 3% of those who recall seeing a perceived misleading advert said they reported it to an official body such as Ofcom, the Advertising Standards Authority (ASA) or Action Fraud.

Variations by demographic group are consistent with those observed for actions taken in response to perceived illegal online adverts (as outlined above in section 6.1).

Figure 6.3: Action(s) taken after seeing perceived misleading advertising online



ACTIONTAKENB. And when you saw this most recent advertisement online that you knew or strongly suspected to be misleading, which actions, if any, did you take?

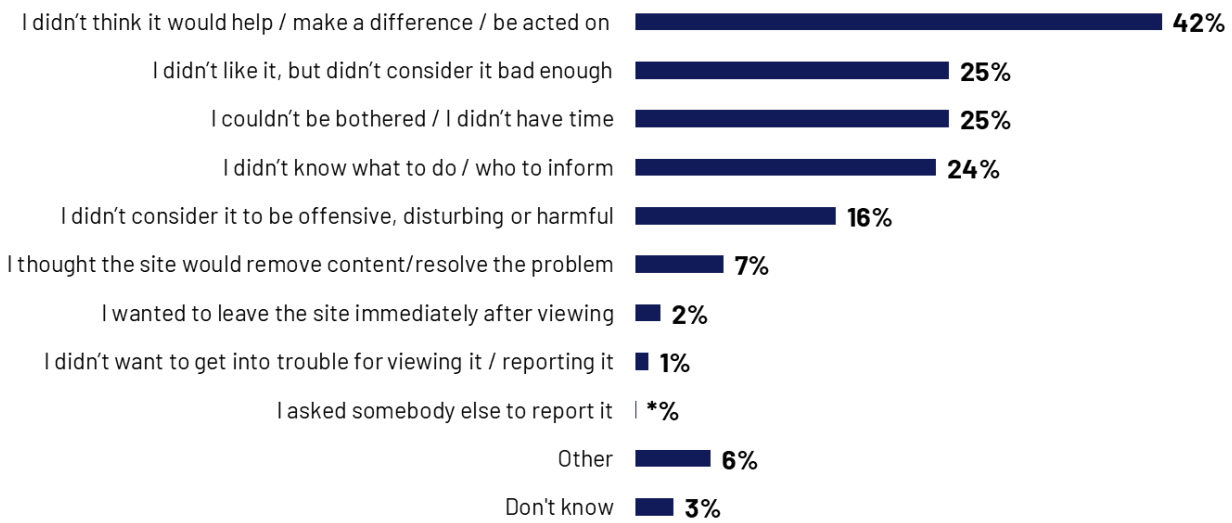
Base: All UK adults, age 16+ who say they have definitely seen online advertising that they know to be misleading in the past 12 months (n1603)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

6.4 Reasons for not taking action after seeing perceived misleading online adverts

Reasons selected by respondents as to why they didn't take action when seeing adverts they perceived to be misleading were very similar to those cited by those not taking action in response to seeing adverts they believed to be for illegal products/services (as outlined above in section 6.2). The most frequent reason cited was the perception that it wouldn't help, make any difference or be acted upon (selected by 42% of those not taking any action). A quarter (25%), however, did not consider the ad to be bad enough while 16% said they did not consider it to be offensive, disturbing or harmful.

The slight difference in the relative ordering of reasons given for not reporting misleading (vs illegal) adverts is a comparatively higher proportion who noted that whilst they didn't like the advert, they didn't consider it bad enough to do something about it (noted by 25% and joint 2nd most prominent reason for perceived misleading online adverts, compared to 19% and 4th most cited reason for perceived illegal online adverts).

Figure 6.4: Reasons why no action taken regarding perceived misleading online advertising



OBARRIERSB. You noted that you did not take any action after you saw an advertisement online that you knew or strongly suspected to be misleading, why was this?

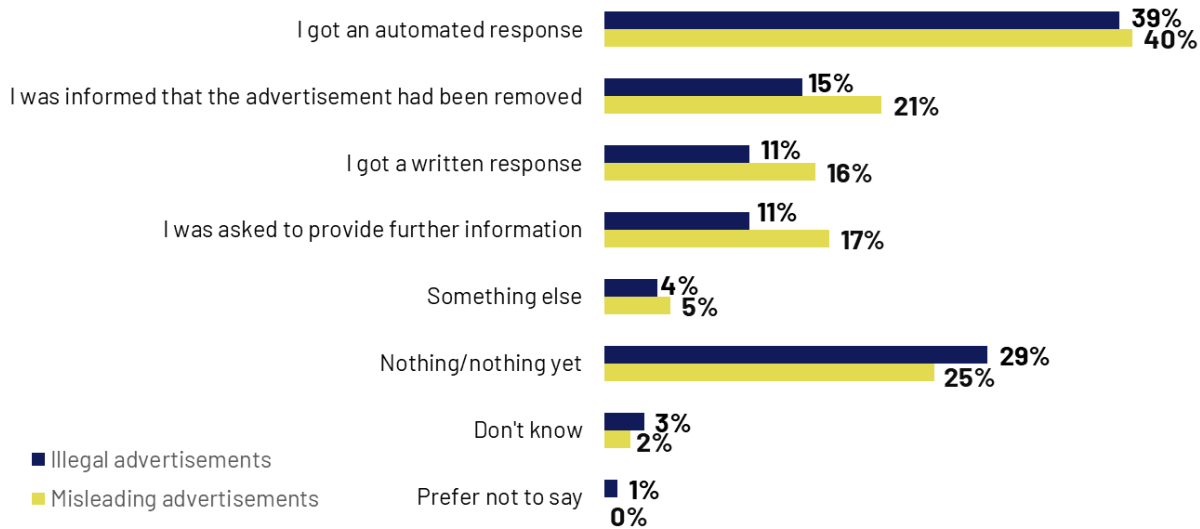
Base: All UK adults, age 16+ who took no action upon seeing an online advertisement they knew to be misleading (n2497)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

6.5 Outcomes from reporting perceived illegal or misleading online adverts

Figure 6.5 outlines what people said happened as a result of them reporting online adverts that they perceived to be illegal or misleading to an official body such as Ofcom, the Advertising Standards Authority (ASA) or Action Fraud, or through informing either the police or a support service.

Around two in five of those who reported a perceived illegal or perceived misleading online advert said they had received an automated response (39% and 40% respectively). In 15-20% of cases they noted having been informed that the advertisement had been removed, whilst fewer noted having received a written response or being asked for further information. Around three in ten (29%) of those reporting a perceived illegal advert and around a quarter (23%) who had reported a perceived misleading advert said they were not aware of anything having (yet) happened.

Figure 6.5: Outcomes from reporting perceived illegal or misleading online adverts



ORESPONSEA. You noted that you informed someone about the advertisement or that you reported it. What, if anything, happened as a result?

Base 1: All UK adults, age 16+ who reported/informed about an illegal advertisement (n229)
 Base 2: All UK adults, age 16+ who reported/informed about a misleading advertisement (n187)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

6.6 Satisfaction with the reporting/complaints process

Those who noted having reported perceived illegal or misleading adverts to an official body, the police or a support service were more likely to express dissatisfaction with the reporting/complaints process than to say they were satisfied with the process.

Perceived illegal advertising

Just over a quarter (27%) of those reporting perceived illegal adverts said they were satisfied with the reporting/complaints process. This compares to 41% of this group who said they were *dissatisfied* with the process.

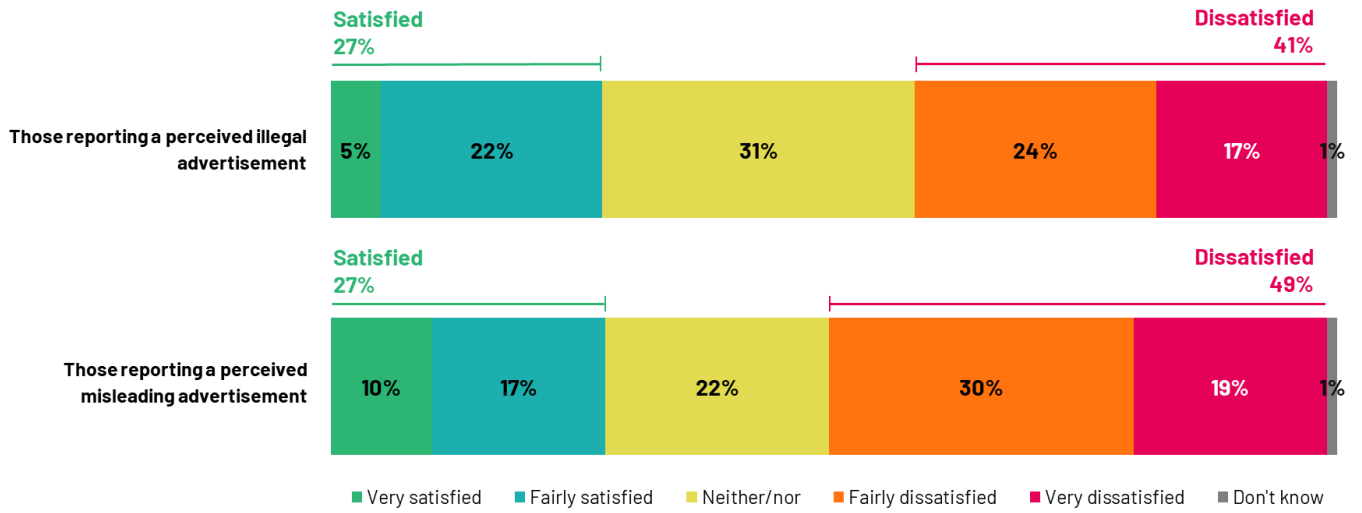
Those in lower household income households (earning less than £26,000 per year) were comparatively more likely to express satisfaction (39%, which was around the same proportion of this group as who were dissatisfied, 40%).

Perceived misleading advertising

Similarly, just over one in four (27%) of those who say they reported adverts that they perceived to be misleading were satisfied with the reporting/complaints process. In contrast, 49% were *dissatisfied* with the process, having reported perceived misleading advertising.

Amongst those reporting perceived misleading adverts, those aged 55+ and those who said they do not enjoy online advertisements were among the groups most likely to say they were dissatisfied with the reporting process (61% and 60% respectively). This latter finding illustrates how broader attitudes towards advertising can have some correlation with specific perceptions of the reporting process (though other factors may also be influencing views).

Figure 6.6: Satisfaction with the reporting/complaints process



QSATISFACTIONA. And how satisfied or dissatisfied were you with the reporting/complaints process?

Base1: All UK adults, age 16+ who reported/informed about an illegal advertisement(n229)
Base2: All UK adults, age 16+ who reported/informed about a misleading advertisement (n187)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

7 Parents' views of children's internet use and exposure to online advertising

The survey provided an opportunity to measure parents' perceptions of their children's exposure to adverts for age-inappropriate products and services. The survey information gathered from parents about their children's online activities and exposure is based on the perspective of the parent, which will not encompass the entirety of their child's online experience, nor necessarily reflect the viewpoint of their children regarding interactions with potentially harmful adverts. These responses from parents will also be subject to recall bias in terms of the types of online content that parents remember and the extent to which they accurately attribute their child's exposure to this content. Some of the responses from parents highlight the likely inaccuracies within their views of what their children have been exposed to via online advertising.

Parents in the survey were asked about a child in their household between the ages of 2 and 15, with one child selected at random in cases where a parent had more than one child in the household within this age range (this was the child about whom the parent was asked to focus on when sharing their views in the survey). This section covers the extent to which parents perceive their children to have been exposed to inappropriate online advertising, as well as broader awareness and confidence around their children's online behaviour.

7.1 Parents' views of their children's internet use

Children's use of the internet

Nine in ten (90%) parents⁵ said that their child uses the internet, including 58% who said they use it several times a day. Around one in twelve (8%) said that their child never uses the internet.

These perceived levels of usage vary significantly depending on the age of the child; 85% of those responding about a child in their household aged 11-15 years old noted that the child used the internet several times a day, compared to 47% of 6-10 year olds, and 27% of 2-5 year olds.

Similarly, parents noting the behaviours of 2-5 year olds were far more likely to say the child *never* uses the internet (24%, compared to 5% of 6-10 year olds and just 1% of 11-15 year olds).

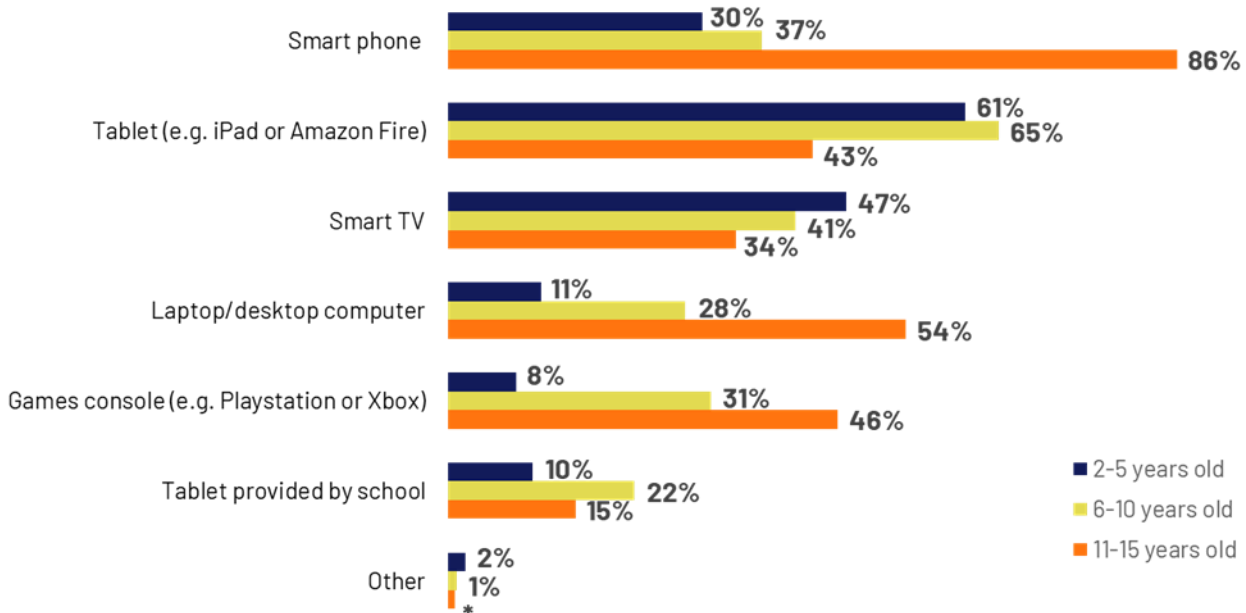
Children's use of devices to access the internet

Parents cited smart phones and tablets as being the most common devices used by their children for accessing the internet (noted by 58% and 54% respectively amongst all parents of 2-15 year olds). Around four in ten (39%) said their child accesses the internet via smart TV, whilst around a third cited laptop/desktop computers or games consoles (36% and 33% respectively).

⁵ 'Parents' within this section of the report are defined as respondents in the survey who were the parent/legal guardian of at least one child in their household between the ages of 2 and 15.

Again, there were significant variations depending on the age of the child. Older children aged 11-15 were far more likely to be cited as accessing the internet via a smart phone, laptop/desktop or via a games console. In contrast, younger children aged 2-5 were more likely to be cited as accessing the internet via a tablet or a smart TV. These variations are shown in Figure 7.1.

Figure 7.1: Devices cited as being used by children to access the internet



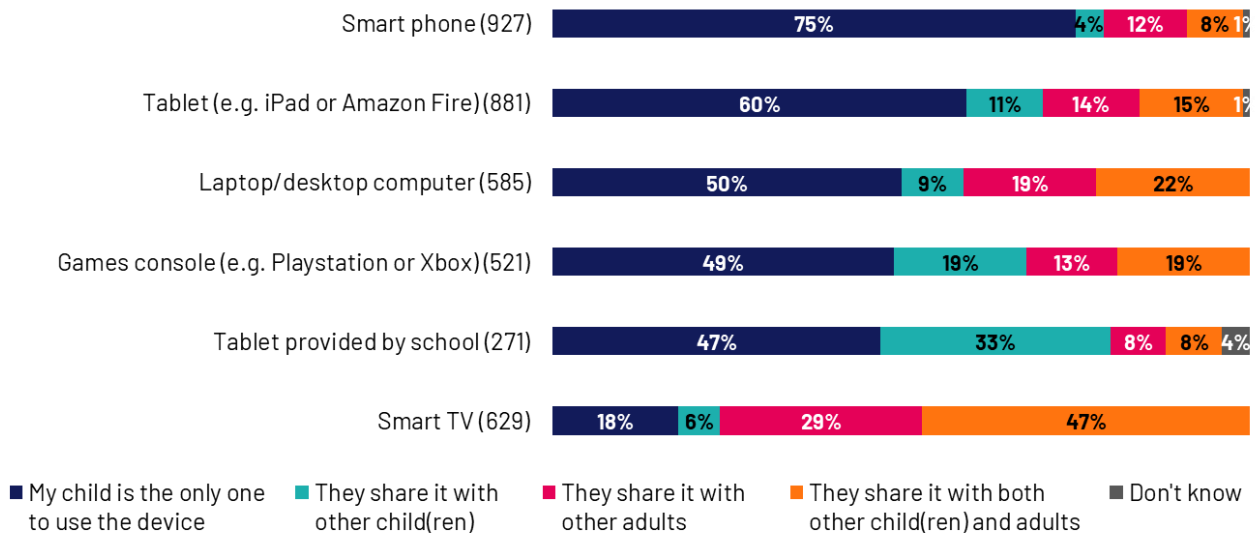
CHILDAD_DEVICE1. Which, if any of the following devices does your child use to access the internet?

Base: All UK adults, age 16+ with responsibility for a child/children aged 2-15 who use the internet (n1607)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

Regarding the extent to which these devices are shared with others, three-quarters of parents who said that their child uses a smart phone to access the internet noted that their child was the only user (75%), whilst three in five (60%) said the same about the tablet that they used. Half of parents (50%) said their child had sole access to the laptop/desktop computer or to the games console (49%) that they used to access the internet. Smart TVs were far more likely to be shared with others in households, with 18% of parents noting that their child is the only one to use the smart TV.

For each of these devices, there are significant variations in the extent of shared usage depending on the age of the child. Older children aged 11-15 are far more likely than younger children to be noted as having sole usage of devices, whilst younger children aged 2-5 are comparatively more likely to be reported as sharing usage with adults.

Figure 7.2: Extent to which devices used to access the internet are shared with others



CHILDAD_DEVICE2. Is your child the only one to use each of the following devices, or do they share them? If shared, is it with other children or adults (including yourself) in the household, or both?

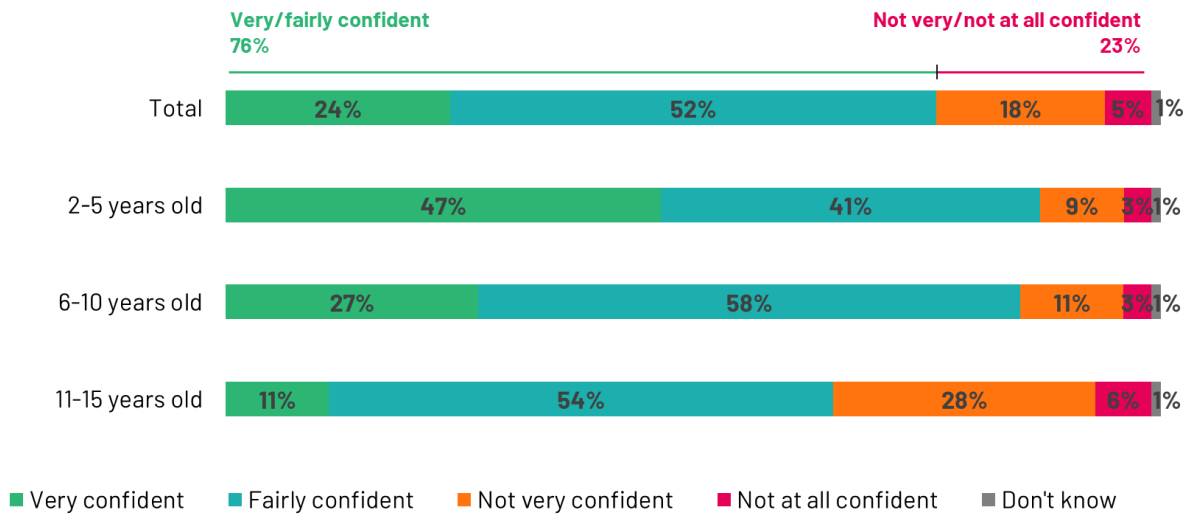
Base: All UK adults, age 16+ with responsibility for a child that uses named device(n) see above
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

7.2 Confidence in knowing what children are seeing online and types of protection taken

Three-quarters of parents (76%) said that they are confident they know what their children are seeing or hearing online. A quarter were *very* confident (24%) and a further 52% were *fairly* confident. Around a quarter (23%) noted they are not confident they know what their children are seeing online, including 5% overall who are *not at all* confident.

As outlined in Figure 7.3, parents are far more likely to feel very confident in knowing what a 2–5-year-old child is seeing/hearing online than they are older children in the household. With regards to older children, whilst the majority of parents say they are confident that they know what their 11–15-year-old child is seeing or hearing online (65% of these parents are very/fairly confident), only around one in ten are *very* confident, and over a third of these parents are not confident (35%).

Figure 7.3: Parents’ levels of confidence in knowing what their children see or hear online

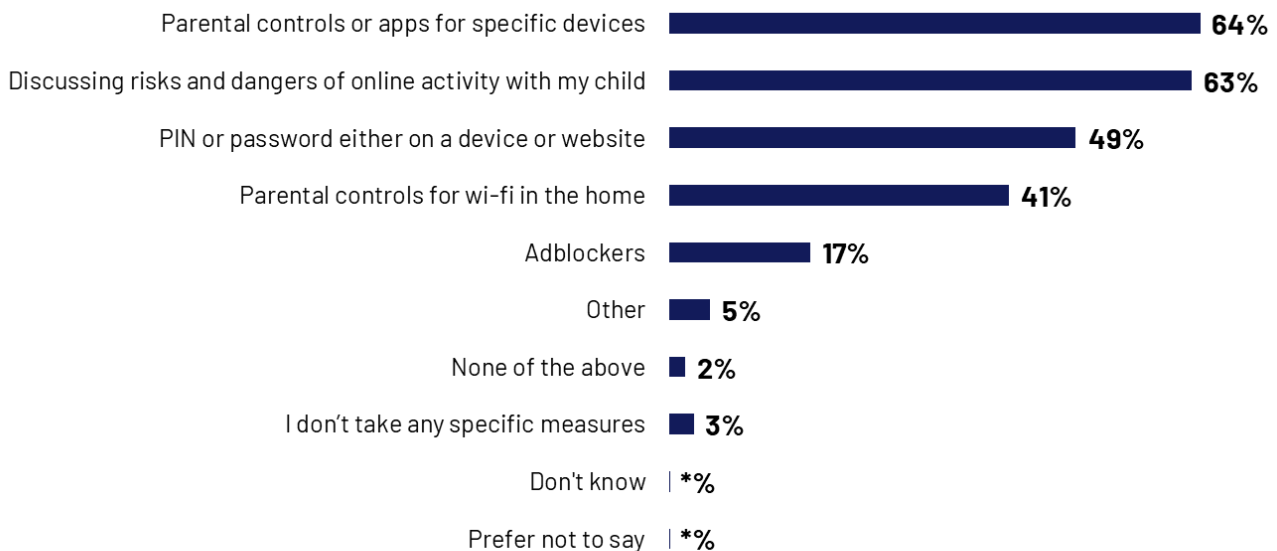


CHILDAD_ONLINE-ACT. How confident are you that you know what your child is seeing or hearing online?

Base: All UK adults, age 16+ with responsibility for a child/children aged 2-15 who use the internet (n1607)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

A significant majority of parents (97%) said that they had taken some measures to protect their children online, as outlined in Figure 7.4. The most commonly reported tools/actions were parental controls or apps for specific devices (cited by 64% of parents), discussing risks/dangers with their children (63%), using PINs or passwords on devices/websites (49%) and engaging parental wi-fi controls in the home (41%). A further 17% said they used adblockers.

Figure 7.4: Online safety measures taken to protect children



CHILDAD_PROTECT. Which of the following measure, if any, do you take to try and protect your child online?

Base: All UK adults, age 16+ with responsibility for a child/children aged 2-15 who use the internet (n1607)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

There is some variation in the measures taken according to the age of the child, though not for all types of action. Table 7.1 shows the differences by age of child, with the likelihood of parents discussing risks and dangers with their children increasing significantly as the child’s age increases. Parents with young

children are comparatively more likely to cite having parental controls or apps for specific devices and/or PINs/passwords for a device or website.

Table 7.1: Online safety measures taken – by age of child

	Age of child			
	Overall	2-5 years	6-10 years	11-15 years
Parental controls or apps for specific devices	64%	67%	76%	54%
Discussing risks and dangers of online activity with my child	63%	27%	68%	77%
PIN or password either on a device or website	49%	57%	59%	38%
Parental controls for wi-fi in the home	41%	35%	48%	40%
Adblockers	17%	19%	18%	15%
Supervision / monitoring their use / history	3%	7%	3%	2%
Limiting the use to safe apps / websites	1%	3%	*	-
Parental control software	1%	-	1%	1%

7.3 Parents' perceptions of their children's exposure to potentially inappropriate online advertising

Parents were prompted with a list of products and services – as outlined in Figure 7.5 - and asked whether they thought or knew their child had seen them advertised online. Whilst these products and services are inappropriate for children (some illegal to be sold to children), parents were not at this stage asked *where* their child may have seen such advertising and so responses may reflect broader exposure through channels/platforms that are not necessarily aimed at children.

In total, 57% of parents surveyed said that they thought or knew that their child had seen at least one of the categories of products/services advertised online. This increases from 45% of parents answering about a 2–5-year-old, to 57% regarding 6–10-year-olds and 64% to 11-15 year olds.

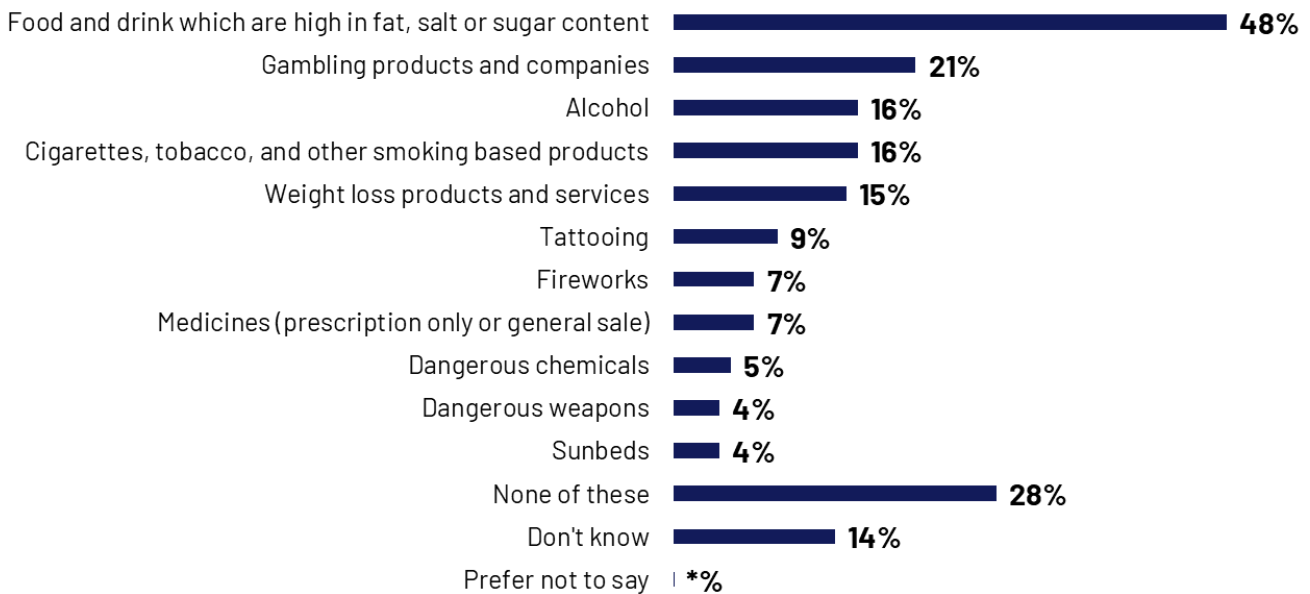
Most parents who cited their child as having seen at least one of these types of adverts noted that this was within the past six months (79% of these parents), with around half of them thinking it was within the past month (48%).

Almost half of parents (48%) thought or knew their child had seen an online advertisement for food and drink which are high in fat, salt or sugar content (e.g. sweets, chocolate, juice drinks), by far the most frequently cited category. The next most frequently cited categories were gambling products/companies (highlighted by 21% of parents), alcohol (16%) and cigarettes, tobacco and other smoking-based products (16%). Other categories of products were cited by fewer parents, as outlined in Figure 7.5.

Parents were not asked how certain they were about what their children had seen advertised and so it cannot be ascertained how confident they were in each of their responses. The presence of smoking-based products within the most frequently mentioned items – despite being illegal to be advertised – suggests that some parents in the survey likely extended their stated recall beyond online advertising.

Just under three in ten parents (28%) did not think that their child had seen any of these types of advertisements online to the best of their knowledge.

Figure 7.5: Types of adverts that parents thought/knew their children had seen online



CHILDAD_B. To the best of your knowledge, which, if any, of the following do you think or know your child has seen advertised online?

Base: All UK adults, age 16+ with responsibility for a child/children aged 2-15 who use the internet (n1607)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

There were notable variations by age of child, as outlined in Table 7.2. Parents of younger children aged 2-5 – those most likely to express confidence in knowing what their children see or hear online (see section 7.2) - were far less likely to cite almost all of the categories listed, with over half (51%) noting that they did not think their child had seen any of those listed (this compares to 12% of parents who perceived their 11-15 year olds to have never seen any of these types of online adverts).

Parents of 11–15-year-olds were far more likely to explicitly say that they did not know if their child had seen these types of adverts online (23% of parents of this age group).

Table 7.2: Parents' perceptions of online advertising seen by children – by age of child

	Age of child			
	Overall	2-5 years	6-10 years	11-15 years
Food and drink which are high in fat, salt or sugar content (e.g. sweets, chocolate, juice drinks)	48%	36%	49%	55%
Gambling products and companies	21%	12%	19%	28%
Cigarettes, tobacco, and other smoking based products, including e-cigarettes and vaping products	16%	6%	14%	22%
Alcohol	16%	6%	13%	23%
Weight loss products and services	15%	7%	11%	23%
Tattooing	9%	3%	7%	12%
Medicines (prescription only or general sale)	7%	4%	7%	10%
Fireworks	7%	5%	5%	8%
Dangerous chemicals (e.g. cigarette lighter fuel, glue, aerosols) and acids	5%	2%	4%	8%
Sunbeds	4%	2%	3%	6%
Dangerous weapons	4%	4%	4%	5%
None of these	28%	51%	33%	12%
Don't know	14%	4%	9%	23%

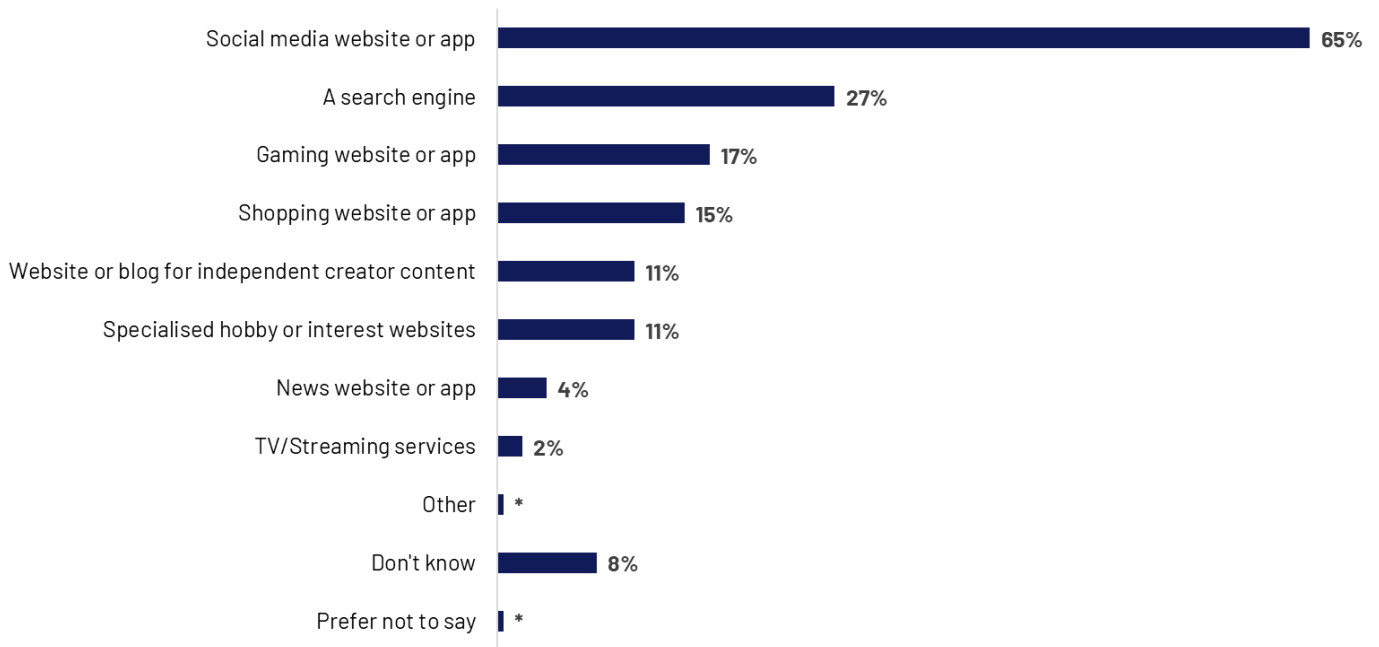
Where parents perceived their child to have seen this advertising

As with the perceived illegal and misleading adverts seen by adults, social media was identified as the most likely route through which children are thought to have seen these adverts. A majority (65%) of parents said social media websites or apps were where they believe their child saw such an advertisement, followed by 27% through a search engine. A further 17% said they believed their child saw a harmful advertisement on a gaming website, while 15% said a shopping website.

Parents of children of all ages are most likely to cite social media above other sources/channels (cited by 68% of parents regarding 11–15-year-olds, 64% of those with 6-10 year olds, and 56% for 2-5 year olds).

The survey did not go into detail about the social media sources and so it is not possible to tell which accounts may be used (i.e. a parent’s or child’s account), and the survey did not collect data on social media profiles so is it not possible to assess whether the children about whom the parents are responding have accurate age profiles within social media accounts.

Figure 7.6: Website/apps where parents perceive their child to have seen these types of adverts



CHILDAD_F. And where do you think your child has seen an advertisement for one of these products or services?

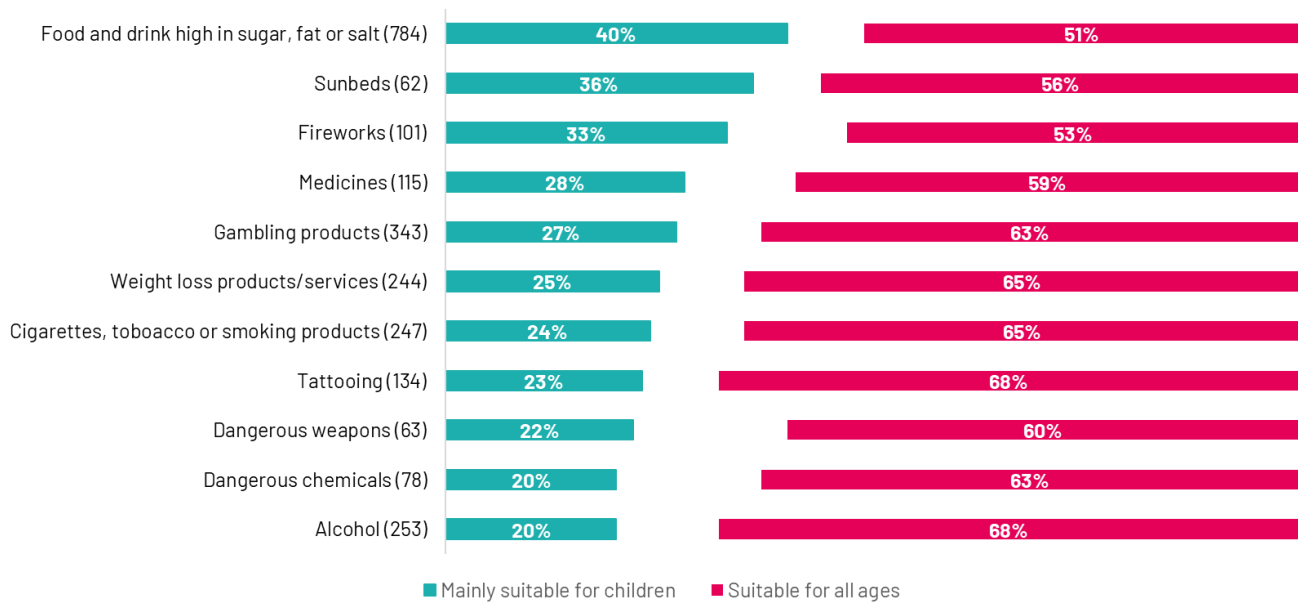
Base: All UK adults, age 16+ with responsibility for a child/children aged 2-15 who think their child has seen adverts online (n917)
Fieldwork dates: 4-10 April 2024
Source: Ipsos

The majority of parents considered the websites, apps or forums where they thought their children had seen or may have seen these advertisements to be suitable mainly for adults or all age groups, as opposed to mainly suitable for children – as shown in Figure 7.7.

Among those who thought/knew their child had seen advertisements online for food and drink with high fat, sugar or salt content – the most prevalent type of advert mentioned - half (51%) thought these had been seen on websites/apps/forums suited to all ages, while 40% considered them to be aimed mainly at children. Across all of the different types of adverts listed, parents were significantly more likely to note the website, app or forum where the child was perceived to have seen the ad as being mainly for adults or people of all ages.

These findings, coupled with the broader considerations around parents providing views on their children’s exposure, highlight that the perceived levels of exposure of children to these types of adverts cannot be assumed to have been through inappropriately targeted adverts.

Figure 7.7: Parents' consideration of whether the perceived source of advertising is suitable for all ages or mainly for children



CHILDAD_C. Would you consider the website, app or forum where they saw the advertisement to be mainly suitable for children, or mainly suitable for adults/people of all ages?

Base: All UK adults, age 16+ with responsibility for a child/children aged 2-15 who think their child has seen adverts online n(see above)
 Fieldwork dates: 4-10 April 2024
 Source: Ipsos

8 Appendices

Breakdown of survey responses

Table 8.1 provides a breakdown of responses by selected demographic variables:

Table 8.1: Number of achieved responses by sub-group

	Number of interviews (unweighted)	Percentage of sample (weighted)
Total	8,511	100%
Male	3,877	48%
Female	4,528	51%
16-34	2,054	30%
35-54	2,915	32%
55+	3,542	39%
White	7,492	85%
Ethnic minorities	915	14%
No Degree	5,567	69%
Degree	2,825	30%
Parent of child below 16	2,021	22%

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ISO 9001

International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.



ISO 27001

International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos UK was the first research company in the UK to be awarded this in August 2008.



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HMG Cyber Essentials

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For more information

3 Thomas More Square
London
E1W 1YW

t: +44 (0)20 3059 5000

www.ipsos.com/en-uk
<http://twitter.com/IpsosUK>

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