

# New report reveals UK as world leader in online safety innovation

- Study shows significant growth of 'safety tech' businesses and their importance in plans to make UK the safest place to be online
- More than 70 companies in London, Leeds, Cambridge and Edinburgh have a quarter of global market share for safety tech products

The independent study, Safer technology, safer users: The UK as a world leader in Safety Tech, highlights significant growth within the sector, with the number of dedicated online safety firms doubling in the last five years and investment increasing more than eight-fold in 2019, making it a record year.

It shows there are almost two thousand people working in more than 70 companies across the UK, including in London, Leeds, Cambridge and Edinburgh.

Leading UK firm Crisp, based in Leeds, has created new technology that is used to detect and remove harmful content from social media and online games, contributing to the safety of an estimated two billion worldwide users each day. While London-based SuperAwesome helps more than 300 of the world's top brands ensure their online engagements with children meet strict data privacy requirements.

The research, carried out between September 2019 and March 2020, comes as the government launches a Safety Tech Innovation Network, the world's first forum for safety tech providers to collaborate and showcase their work, alongside a scheme to boost exports.

Minister for Digital and Culture, Caroline Dinenage, said:

We are all spending more time online during the pandemic and this new report shows the value the safety tech sector could add as we look to power growth out of it.

Its innovative products, many of which are developed in towns and cities across the country, are being used globally to help companies make their online platforms safer.

The government is leading the world, developing online harms laws and it's great to see our brilliant British tech industry is part of the solution.

The companies highlighted in the report are providing tools to help protect users online and demonstrating the UK tech sector can be a central to tackling the challenge.

While the research for the report was carried out prior to the impact of coronavirus, high growth rates are still projected for the safety tech sector driven by increased demand for their products. The main findings of the report are:

- UK safety tech providers currently hold an estimated 25 per cent of the global market share
- The number of dedicated safety tech firms has doubled in the last five years, with 70 firms identified in the report. Almost half have an international presence
- In 2019, the sector generated £226 million in annual revenues, and has grown rapidly with an estimated 35 per cent annual growth rate since 2016
- Some of the most established companies (those earning in excess of £5 million) have grown at rates of up to 90 per cent a year, and the report estimates that safety tech revenues could exceed £1 billion by 2025.
- In 2015, the safety tech sector raised £6 million in external investment across ten deals. By 2019, the figure had increased more than eightfold to £51 million across nineteen deals.
- The report anticipates the UK is likely to see its first safety tech unicorn (a company worth over \$1 billion) emerge in the coming years, with three other companies also demonstrating the potential to hit unicorn status in the early 2020s.

The sector consists of companies in fields such as data and computer science providing a range of tech solutions and applications to help increase safety on websites and in apps and video games such as those allowing user-generated content and interactions.

Examples of British companies and the products and services they provide include:

- Cyan Forensics, Cubica Technology and VigilAI are working closely with law enforcement on 'digital forensics' – the automated identification, location and removal of illegal child sexual abuse and terrorist material

- Crisp, Qumodo and Spirit AI are assisting moderators of social media and gaming platforms to actively identify and respond to bullying, harassment and abuse on their platforms
- SuperAwesome, SafeToNet, Yoti and Trust Elevate are providing tools that verify the age of users and ensure phones, tablets and the apps on them are safe and appropriate for children
- South West Grid for Learning, Smoothwall and Opendium are filtering, blocking or blacklisting harmful content across school, business or home internet
- Full Fact, Factmata and Astroscreen are tackling false, misleading or harmful online narratives, by providing fact-checking services or promoting trusted news and information

To further capitalise on the sector's success, and in response to the report's recommendations, the government is today announcing:

- A Safety Tech Innovation Network, co-funded by Nominet, to launch later in 2020. This will be the world's first forum for safety tech providers to collaborate and promote their work
- A virtual safety tech expo to showcase safety tech to the world
- A safety tech export pilot, run by the Department for International Trade, to include a directory of UK safety tech organisations and exploratory international missions – which can be virtual if necessary

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Further quotes

Andy Burrows, head of child safety online policy, at NSPCC, said:

This report highlights how the creativity and passion of the UK tech sector can lead the world with new solutions to tackle online harms. The emergence of a thriving safety-tech sector is a crucial component of the move towards a Duty of Care, and to ensure tech firms can offer meaningful protections to children online.

Ian Stevenson, Chair of the UK's Online Safety Tech Industry Association (OSTIA) and CEO of Cyan Forensics, said:

This report comes at a vital time for online safety – important strides are certainly being made, but the challenge to keep internet users safe is broad and ongoing. However, with resources such as today’s report and continued collaboration between specialist companies, industry organisations and the Government, we will continue to see real, sustained changes made in this sector; with the UK remaining as a leading light in the online safety space.

Julie Inman Grant, Australian eSafety Commissioner, said:

This report provides important insights into the burgeoning field of online safety tech, reflecting a growing recognition for the need to develop more responsible technology – with safety built in from the get-go. The significance of international collaboration, multi-stakeholder engagement, and investment in safety tech and ‘safety by design’ has never been more important.

Daniel Korski, CEO of PUBLIC, said:

Thanks to the efforts of some of the country’s most entrepreneurial minds, the UK has fast become a global leader in technologies to help guarantee safety online, as this report clearly shows. Investors should take note; with one quarter of the global online safety tech sector based here in the UK – and demand for such technologies only set to grow, not least because of Covid19 strictures – the opportunities offered by an early-stage market experiencing rapid, significant growth are very exciting.

Ellie Bradley, MD Registry and Public Benefit at Nominet said:

We’ve worked hard to understand what the most effective instruments will be to energise the safety tech sector in the UK. Leaning on our experience operating a world class domain registry, our cyber security expertise and our tech for good initiatives, means we are in a unique position to help enable the digital economy in this emerging space. The aim is that the innovation network we’ll be supporting provides an essential platform to foster creativity and collaboration in this dynamic sector – and bolstered by key research, business support and future investment we hope these interventions sow the seeds that see the UK leading the world in safety tech.

## Notes to editors

- The [‘Safer technology, safer users’](#) report is an independent research

report produced for DCMS by [Perspective Economics](#), a Belfast-based economic advisory company. Independent academic advisory input was provided by Professor Julia Davidson and Professor Mary Aiken (University of East London). The report meets the commitment set out in the Online Harms White Paper to assess the capability and potential of the UK online safety sector.

The launch of the 'Safer technology, safer users' report follows the establishment in April 2020 of the UK Online Safety Tech Industry Association, [OSTIA](#) which brings together the UK's leading safety tech companies. These include Crisp, SafeToNet, Securium, Yoti, Cubica Technology, DragonflAI, GoBubble, Image Analyser, Qumodo, SuperAwesome, Securus Software, Trust Elevate, VigilAI and Child Safe VPN.

Alongside the Safety Tech Innovation Network, Expo and Export pilot, the government will also:

- explore ways in which best practices in online safety can be included in standards and guidance for buying, building and reusing government technology, such as the Technology Code of Practice
- develop a Safety Tech Sector Strategy, to guide future priorities for sector support

A podcast interview with the report authors will be released by SafeToNet Foundation on Wednesday 27 May, and will be available at the following URL: <http://safetonetfoundation.libsyn.com/>.