Attitudes to Online and On Demand Content

2014 report

Published April 2015

For:

Ofcom

bdrc continental

Tim Barber/Jeremiah Fryer
Tel: 020 7400 1000
Tim.Barber@bdrc-continental.com

providing *intelligence*

About this document

In this report we examine the use of on-demand and online audiovisual services in the UK. The report provides detailed evidence about users' perceptions of content standards in audiovisual content and their concerns about those standards.

We also report findings on users' understanding and expectations of regulation in this area.

This report is a reference tool for industry, stakeholders and consumers. It provides context to Ofcom's work in furthering the interests of consumers and citizens in the markets we regulate.

Contents

1. Executive summary

1.1 Background and objectives

Ofcom has a number of duties in relation to online audiovisual content. It regulates on-demand programme services (ODPS) that are notified and based in the UK, to ensure that providers apply the relevant standards. Ofcom also has a duty to advise the Government on the need for protection of consumers and citizens in their consumption of audiovisual (AV) services, and in particular the need to protect children.

Ofcom seeks to understand people's use of, and attitudes towards, notified ODPS in the broader context of *all* on-demand and online audiovisual services in the UK. The main objectives of this survey are therefore:

- to investigate the perceptions of, and concerns about, content standards among viewers of certain audiovisual content; and
- to inform our understanding of viewers' attitudes to, and expectations of, regulation in relation to on-demand and online content and services[1].

The survey covers the full range of audiovisual content that is available on-demand and online: sourced either directly via the internet, via an app, or via a provider of a service; for example, programmes on BBC iPlayer, clips on YouTube and films provided by on-demand services from Netflix.

1.2 Methodology

The main survey involved interviews with a representative sample of 2,678 adults who use on-demand and online services. This was supplemented with an additional sample of 500 teenagers (aged 12-15).

[1] For ease of reading, online and on-demand services are occasionally abbreviated to 'online services' throughout this report.

1.3 Summary of key findings

Use of on-demand and online services

UK adults' consumption of online and on-demand AV content is widespread and almost universal for those aged under 24.

- Around three-quarters (71%) of adults aged 16+ claim to have 'ever viewed' on-demand and online content, and use is almost universal among 16-24 year olds (94%).
- The use of long-form TV catch-up services is roughly the same as the most-used short-form service, such as non-professional YouTube content, in both overall penetration and frequency of use.

Teens' (aged 12-15) consumption patterns are similar to those of all adults, albeit with a higher level of use for most services.

- Teens use a wide range of online services, particularly for non-paid long-form and most short-form content.
- However, young adults' (aged 16-24) consumption levels tend to outstrip those of teens.
- Teens are less likely to use PCs/Macs/laptops and more likely than adults overall to use smartphones and tablets to view on-demand and online services.

Concerns regarding on-demand and online content, and reactions to it

Overall, around a tenth (11%) of on-demand and online content viewers have seen something of concern on an on-demand or online service.

- Levels of concern correlate with age, with the highest incidence of concern among the younger age groups (16% among 12-15s and 16-34s). This also correlates with the level of use, which implies that greater levels of use lead to higher potential levels of exposure to concerning content.
- The top three concerns among adults who have seen something of concern relate to violence (39%), sex (30%) and bad language (27%), similar to those identified in other research of concerns about broadcast television[2]. Younger users are experiencing different issues, and the top three concerns among teens relate to bad language (37%), bullying or victimisation (37%) and violence (33%).

[2] http://stakeholders.ofcom.org.uk/market-data-research/other/tv-research/attitudes-to-broadcast-media/

For adults

- Other areas of main concern include the welfare of children and young people (26%), discrimination (22%) and online bullying/victimisation (21%). Dangerous behaviour (18%) and suicide (14%) are also mentioned by around one in six adults who have seen something of concern.
- The most common response to seeing concerning content is to stop viewing the specific content, but to continue using the service (50%); a third of concerned adults (31%) claim to have made a complaint either to the content provider (24%) or to a third- party body (15%).
- The types of content perceived to be harmful to children are broadly in line with the types causing concern, although misleading advertising, defamation and infringement of privacy are seen to be relatively less harmful.

Parents are significantly more likely than non-parents to have been concerned by on-demand and online content (17% vs. 8%).

- However, they are no more likely to be concerned about any particular type of content, apart from pornography (22% vs. 14%).
- They are more likely to have taken action by making a complaint (35% made a complaint compared to 25% of those without children), by complaining to the provider (29% vs. 17%) and/or complaining to a third-party body (19% vs. 11%).

For teens

- The main concerns amongst teens relate to bad language mentioned by 37% and violence mentioned by 33% of those who have seen something of concern).
- 29% of concerned teens indicate a concern about content defined as “People being nasty, mean or unkind to each other or seeing bad things people have written about someone else or being picked on by other people online”. 16% concerned of teens selected an option defined as “People being nasty, mean or unkind to me”, or “being picked on by other people online”). The combined total at 37% makes concern over bullying, either bullying of others or of themselves, equal to the top concern of teens around bad language, and outweighs adults citing bullying or victimising as something of concern, at 21%.
- Other issues for concerned teens include: cruelty to animals (24%), seeing things that are “too old” (24%), things of a sexual nature (23%), sad/frightening/embarrassing things (23%), dangerous behaviour (21%), suicide (19%), drugs/drug use (19%), content harmful

to their self-esteem (18%), gossip being spread even if it isn't true (18%) and trolling/online harassment (17%).

- Teens are most likely to have stopped viewing (65%) or told their parents (64%) when seeing something of concern. Three-fifths (60%) of those who stopped viewing also told their parents.

Understanding of, and attitudes towards, regulation

There is mixed understanding of regulation in the on-demand and online environment.

- TV catch-up services are the most likely to be correctly identified as being regulated (63%)[3].
- There is increased misunderstanding of regulation as the user moves away from 'TV like' content, for example around 40% of users know that user-generated content is unregulated.
- The highest level of mis-attribution is for video on news websites.
- Younger adult users are more likely to get it wrong.

Bearing in mind the mixed understanding by users in this area, we need to be cautious about interpreting their attitudes towards current levels of regulation.

- People who have seen something of concern are more than twice as likely as average to feel there is too little regulation (35% vs. 14%).

Around two-fifths (41%) feel that on-demand and online content overall should be regulated. Parents and females feel more strongly that there should be regulation.

- People wrongly believe there is variation in the levels of regulation by device: perceived regulation is highest for devices used to access content via a TV set and drops off for more 'personal computing- type' devices (like smartphones and tablets), reflecting the higher perceived regulation for TV-like services.

However, there is a desire for consistency of regulation across devices.

- Most users think that responsibility for regulating on-demand and online services lies with content providers themselves. Ofcom and the Advertising Standards Agency (ASA) are the most-mentioned third-party bodies. Younger people tend to be more likely to feel that

[3] The survey offered a description of regulation: *By regulation we mean rules and regulations put in place by the Government/ an independent regulatory body about what can and cannot be shown.*

responsibility is down to self-regulation by the content providers or the creators themselves.

2. Background, objectives and method

2.1 Background

Ofcom has a long-standing remit regarding licensed broadcast television. It also has responsibilities with regard to on-demand programme services (ODPS) that operate as notified services[4] within UK jurisdiction. These can be described as follows:

- TV and radio services that are licensed by Ofcom are regulated under the **Ofcom Broadcasting Code**.
- Online services that provide 'TV-like' content and meet certain criteria have to notify themselves to the Authority for Television On Demand (ATVOD) as an ODPS.

Ofcom also retains backstop powers on appeals and breaches of standards. All other online audiovisual content is excluded from Ofcom's remit.

Ofcom has powers to ensure that certain minimum standards are met by notified ODPS. There are also rules regarding commercial content in programmes; adverts viewed as a result of consuming media on these services also fall under regulation.

The definition of an ODPS excludes many non-'TV like' services and much clip-based material and short-form programming (whether professionally produced or user-generated content). However, Ofcom has a duty to advise Government on the need for protection of consumers and citizens in their consumption of audiovisual services, and in particular the need to protect children. Therefore, Ofcom seeks to understand people's use of and attitudes towards notified ODPS in the broader context of *all* on-demand and online audiovisual services in the UK.

As noted above, the scope of this survey covers the full range of audiovisual services that are available on-demand, and are sourced either directly via the internet, or via a provider of a service. This includes notified services that are defined as 'TV like' within the meaning of an ODPS, and other long- or short-form audiovisual content.

.

[4] Under the Communications Act, a regulated (notifiable) service is one that (a) provides programmes comparable to the form and content of **television** programmes i.e. is TV-like, (b) access to it is **on-demand;** (c) there is a person who has **editorial responsibility** for it; (d) it is **made available** by that person for use by **members of the public**; and (e) that person is under the **jurisdiction** of the United Kingdom.

2.2 Research objectives

The overarching aim of this research is to investigate people's perceptions of, and concerns about, content standards, and to explore understanding and expectations of the regulation of on-demand and online audiovisual content among viewers of these types of services[5].

Specific research objectives were to:

- Measure people's use of audiovisual content across a range of categories.
- Investigate people's perceptions of, and concerns about, content standards, in relation to their online consumption of audiovisual content across these categories.
- Understand people's reaction to exposure to such content.
- Measure people's understanding of regulation and self-regulation of online audiovisual services:
    - What levels of awareness are there of regulated services?
    - Do consumers know how and by whom they are regulated?
    - Do consumers think that additional regulatory interventions or consumer tools are needed?
- Investigate consumer awareness of existing self-regulatory tools, including reporting mechanisms.
- Understand consumer expectations of the regulation of on-demand and online services.

2.3 Research method

Main survey – benchmark wave

The on-demand and online tracker was conducted via an online survey using a panel sample for the two waves (June and October 2014) with a combined total of 2,678 respondents. This consisted of a demographically representative sample of 2,071 on-demand and online users (c. 1,000 each wave) and 607 targeted boost interviews (c. 300 each wave) among low incidence on-demand and online user groups (see Annex B).

- Demographic targets were set on gender, age, socio-economic group, nation, working status, household size and parental status, to match the profile of offline users (the full demographic weighting matrix can be found in Annex B and C).

[5] For ease of reading, online and on-demand services are occasionally 'short-handed' to online services throughout this report.

At the start of the online survey all respondents were screened to ensure they were consumers of at least one of the range of relevant on-demand and online content types, via at least one of the relevant devices (full list in Section 2.3.3).

A further establishment survey was conducted via a face-to-face omnibus in September 2014 which was used to validate and re-calibrate the online data in line with any changes from the January 2014 establishment survey used at the pilot (see Annex B).

An additional supplementary survey of 500 interviews was carried out using the same methodology among 12-15 year olds (referred to as 'teens' throughout this report) using a simplified version of the main questionnaire, modified with age-appropriate language.

This report covers the first full year of the on-demand and online tracker run in 2014, for both adults and teens.

2.3.1 Notes on statistical differences

Where significant differences have been noted these are at the 95% confidence level. This means that we can be 95% confident that the difference is not simply due to chance.

2.3.2 Full list of on-demand and online services

The report covers the full range of services that deliver on-demand and online content. Some of those discussed are more 'TV-like' than others, meaning that the experience is more akin to watching traditional programming, albeit in a non-linear manner. For the purposes of analysis in this report, we have used the following broad classification of services, ranging from most to least 'TV-like'.

Throughout the report, we generally refer to each of these services using the simplified descriptions below.

<table>
<tr><th><u>Full service description</u></th><th><u>Simplified description</u></th><th></th></tr>
<tr><td>TV catch-up services (e.g. BBC iPlayer, ITV Player, 4oD, Demand 5, Now TV)</td><td>TV catch-up</td><td rowspan="5">Most ‘TV-like’
Predominantly long-form
Regulated</td></tr>
<tr><td>Free video on-demand content available through a subscription service provider (e.g. Virgin Media/Sky Go)</td><td>Free VOD from TV provider</td></tr>
<tr><td>Paid video on-demand content available through a subscription service provider (e.g. film rental on a pay per view basis on Virgin Media, Sky Go)</td><td>Paid VOD from TV provider</td></tr>
<tr><td>Online video rental services downloaded or streamed (e.g. Blinkbox, Amazon Prime Instant Video, Netflix)</td><td>Online video rental</td></tr>
<tr><td>Video content that is paid for on digital or online stores (e.g. iTunes Store, Google Play)</td><td>Paid content from online stores</td></tr>
<tr><td>Other TV or video channels available online (e.g.southparkstudios.co.uk, Vevo.com)</td><td>Miscellaneous/other online TV/video channels</td><td rowspan="5">Least ‘TV-like’
Predominantly short-form
Unregulated</td></tr>
<tr><td>Official YouTube channels from familiar brands/organisations (e.g. 4oD, BBC Worldwide, Jamie Oliver's Food Tube, Top Gear)</td><td>Official YouTube</td></tr>
<tr><td>Video content on news websites (e.g. The Sun/The Guardian/The Huffington Post/www.bloomberg.tv)</td><td>News website video</td></tr>
<tr><td>YouTube videos uploaded by friends, family or other YouTube users (i.e. non-professional)</td><td>Non-professional YouTube</td></tr>
<tr><td>Video content posted on social networking sites other than YouTube (e.g. Facebook, Twitter, blogs, Vimeo)</td><td>Non-YouTube social networking site</td></tr>
</table>

2.3.3 Full list of devices used for on-demand and online content

The report covers the full range of devices that deliver on-demand and online content. We discuss these throughout in two broad categories – those viewed **via a TV set** and those not viewed **via a TV set**.

Throughout the report, we refer to people who use each specific device (for any purpose) as an ‘owner’, although the questionnaire asked about use of each device, regardless of whether it actually belonged to the respondent.

<table>
<tr><td><u>Full device description</u></td><td></td></tr>
<tr><td>PC/Mac/laptop</td><td rowspan="3">• Non TV-based</td></tr>
<tr><td>Smartphone (i.e. a phone on which you can easily access emails, download files and applications, and generally surf the internet, e.g. BlackBerry, iPhone and Android phones such as the Samsung Galaxy)</td></tr>
<tr><td>Tablet computer (e.g. iPad/ Kindle Fire HD)</td></tr>
<tr><td>Set-top box for on-demand content with a subscription service (e.g. Virgin Media/ Sky) – connected to a TV</td><td rowspan="5">• TV-based</td></tr>
<tr><td>Set-top box without a subscription service (e.g. Freeview/Freesat/YouView/Now TV) – connected to a TV</td></tr>
<tr><td>Games console (e.g. PlayStation/ Xbox/ Wii/ PS3) – connected to a TV</td></tr>
<tr><td>Smart TV (a new type of TV connected to the internet that can display online content directly onto your TV screen without the need for a computer; set-top box or games console). Sometimes referred to as a ‘connected TV’ or ‘hybrid TV’</td></tr>
<tr><td>Other internet connected player or box that you use for viewing TV/ video content (e.g. Roku/ Apple TV/ Google TV/Google Chromecast)) – connected to a TV</td></tr>
</table>

3. On-demand and online consumption

3.1 Key findings

- On-demand and online content is widely viewed in the UK; around three-quarters (71%) of adults aged 16+ claim to have 'ever viewed' this type of content. Use of any on-demand and online service is almost universal among 16-24 year olds and use of nearly all individual services is higher among younger groups, and declines among older age groups.

- Short-form on-demand and online content such as that available on social networking sites is generally consumed more widely and more often than long-form content that is more 'TV-like'. An important exception to this is the use of long-form TV catch-up services, which are used as much as the most-used short-form service: non-professional YouTube content.

- PCs/Macs/laptops are the most widely and frequently used devices to access on-demand and online content, used by 74% of respondents. Younger adults (16-24) are more likely than other age groups to access content this way. They are also more likely than adults overall to use smartphones and tablets to view on-demand and online content. Device use reflects general device ownership. Additional analysis among device owners shows that the three devices most widely used for viewing on-demand and online content are all TV set-based. Those devices whose primary purpose is typically something other than viewing content are used less often (smartphone 76% and games console 74%).

- In terms of content type, long-form content is accessed more commonly via TV-based devices, while short-form 'snacking' content tends to be viewed via portable devices (smartphones and tablets) or PCs/Macs/laptops. This is likely to be related to screen size and comfort of viewing.

- Teens' consumptions patterns are similar to those of all adults, with a higher level of use for most services. They use a wide range of online services, particularly for non-paid long-form and most short-form content. However, young adults' (aged 16-24) consumption levels tend to outstrip those of teens. Teens are less likely to use PCs/Macs/laptops and more likely than adults overall to use smartphones and tablets to view on-demand and online services.

3.2 On-demand and online viewers

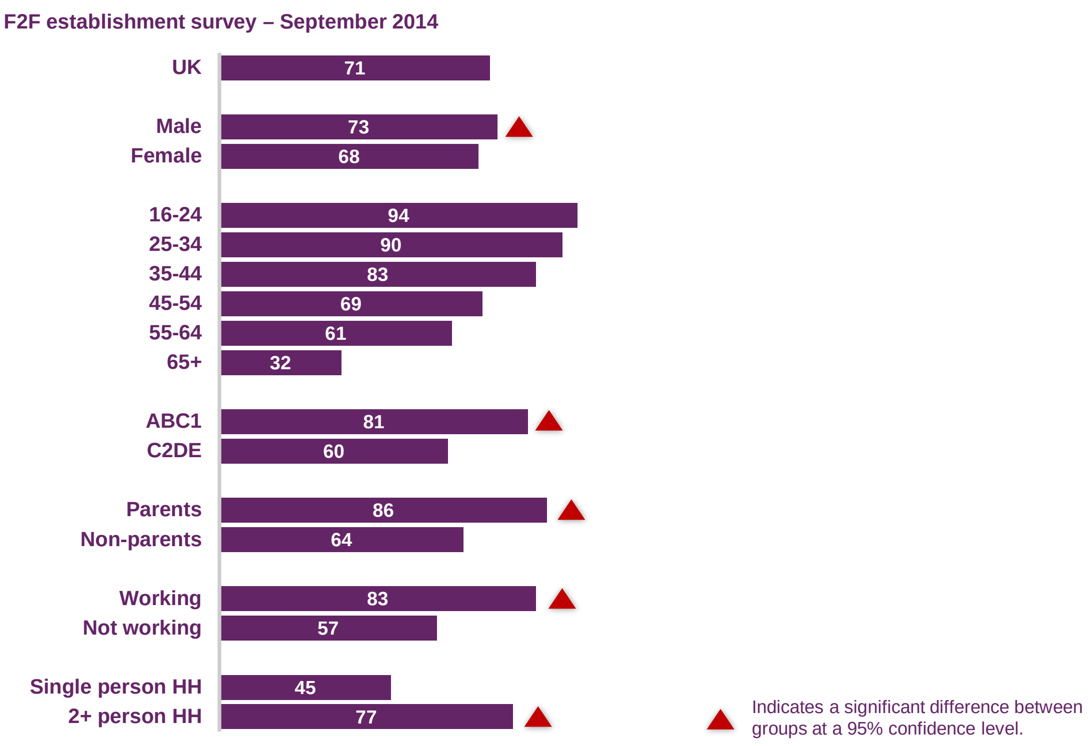
On-demand and online content is widely viewed in the UK, with around three-quarters (71%) of adults aged 16+ claiming to have 'ever viewed' this type of content.

Use is almost universal among the younger age groups: 94% of 16-24 year olds have 'ever viewed' on-demand and online content.

There is a high correlation between usage levels and age. Use of any service is higher among younger groups, and declines among older age groups.

As seen in Figure 3.1, males, ABC1 socio-economic groups, parents and those in work are all significantly more likely than other sub-groups to have viewed on-demand and online content.

Figure 3.1 Proportion using any on-demand and online service in the past 12 months



Source: F2F Omnibus September 2014 Q4 Looking at the following services, please could you say how often you typically watch each of these?
Base: All UK adults 16+ (2074), Male (1001), Female (1073), 16-24 (265), 25-34 (367), 35-44 (296), 45-54 (304), 55-64 (280), 65+ (562), ABC1 (884), C2DE (1190), parents (594), non-parents (1480), working (937), not working (1137), single person household (466), 2+ person household (1608)

3.3 On-demand and online services

On-demand and online services can be divided into two broad types:

- those that carry predominantly long-form content (TV catch-up, free and paid VOD from a TV provider, online video rental and paid content from online stores); and
- those that carry predominantly short-form content (official and non-professional YouTube, news website video, non-YouTube social networking site content and other online TV/video channels).

Services delivering short-form on-demand and online content are generally consumed more widely and more often than those which provide content that is long-form and more 'TV-like'. However, there are some exceptions:

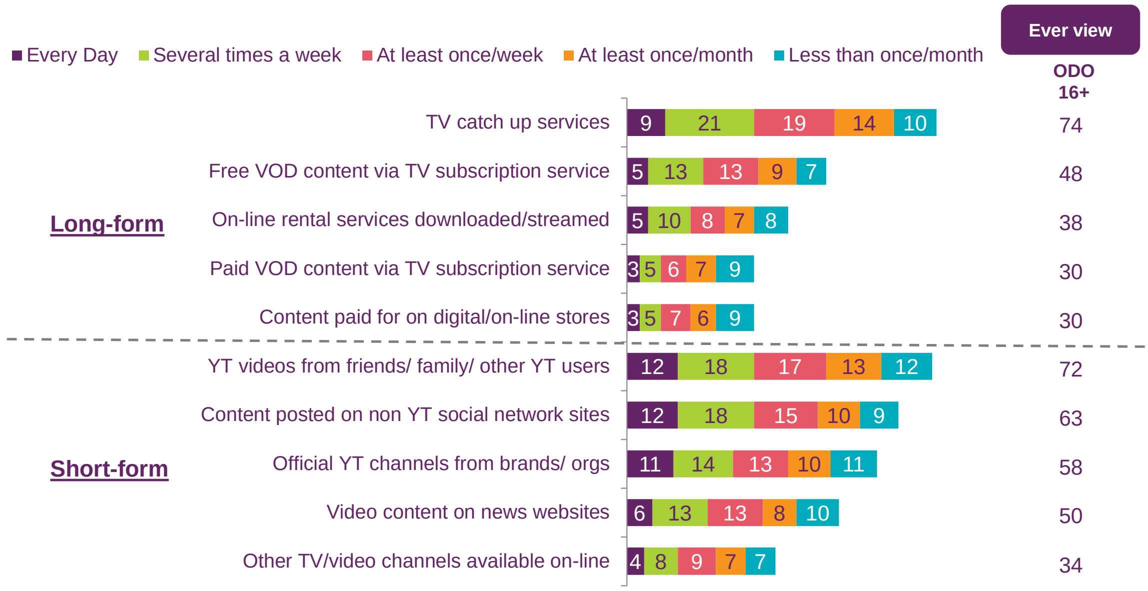
- The use of the main long-form service (TV catch-up services) is equal to the most used short-form service (non-professional YouTube content) in both overall penetration and frequency of use.
- The short-form service 'other online TV/video channels' is among the least widely and frequently used of all services.
- The short-form service 'news website video' is equal in frequency and breadth of use to the second most used long-form service (Free VOD from a TV provider).

The services most widely used to view long-form content are TV catch-up services (74% of on-demand and online users aged 16+ have 'ever used' these services). The second most widely used are free VOD services from a TV provider, used by just under half of online users (48%). Next comes online video rental, used by just over one-third (38%) of all on-demand and online users aged 16+.

Short-form content viewing is predominantly via YouTube and other social networking sites. Non-professional YouTube content, user-generated content, is the most commonly viewed (72%) followed by content viewed on non-YouTube social networking sites (63%) and official YouTube channels (58%) (Figure 3.2).

There is a strong correlation between the proportions ever using each service and higher usage levels.

Figure 3.2 Frequency of using on-demand and online services among adults



Source: On-demand and online tracker 2014 online Q9 So looking at the following services, please could you say how often you typically watch each of these?
Base: All on-demand and online users (2678)

Parents are significantly more likely than non-parents to have ever used on-demand and online services. This is probably because they have children in their household, have a higher penetration of device ownership and watch more content generally.

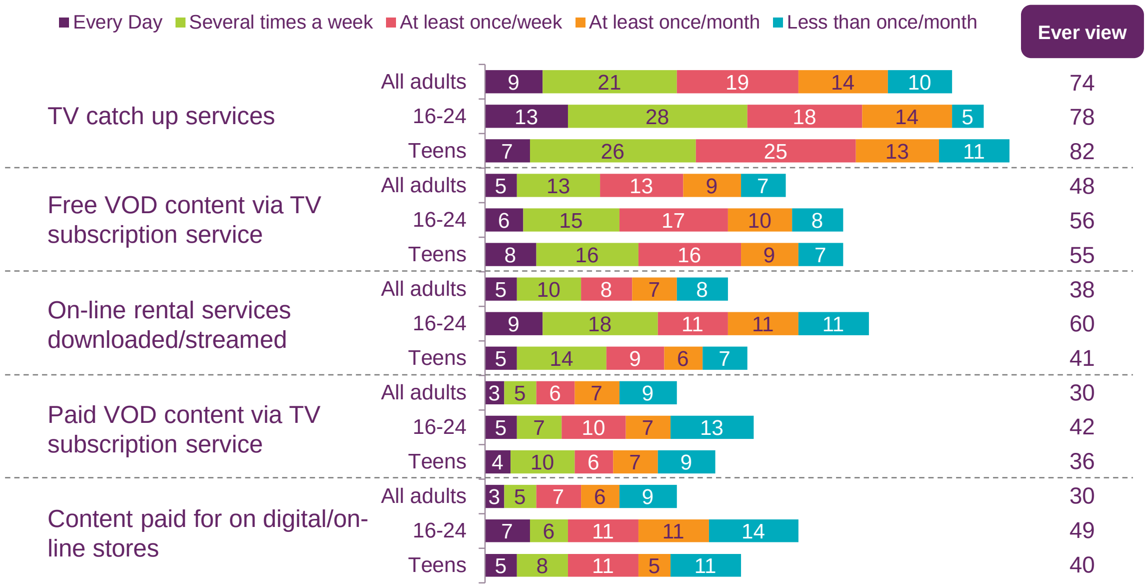
There is a high correlation between online service usage levels and age. Use of nearly all of the online services is higher among younger groups and declines with age, with the exception of TV catch-up services, which have slightly higher use among those over 55.

Teens follow a similar pattern to all adults, albeit with a higher level of use for most services (Figure 3.3).

For some long-form services, frequency of using among teens is closely aligned with the 16-24 age group. This applies to TV catch-up services and free VOD from a TV service provider.

However, paid-for long-form services are used more widely by younger users (16-24 year olds) than by either teens or adults overall. Paid-for services are also used more frequently by 16-24s, and to a lesser extent teens, than by older respondents.

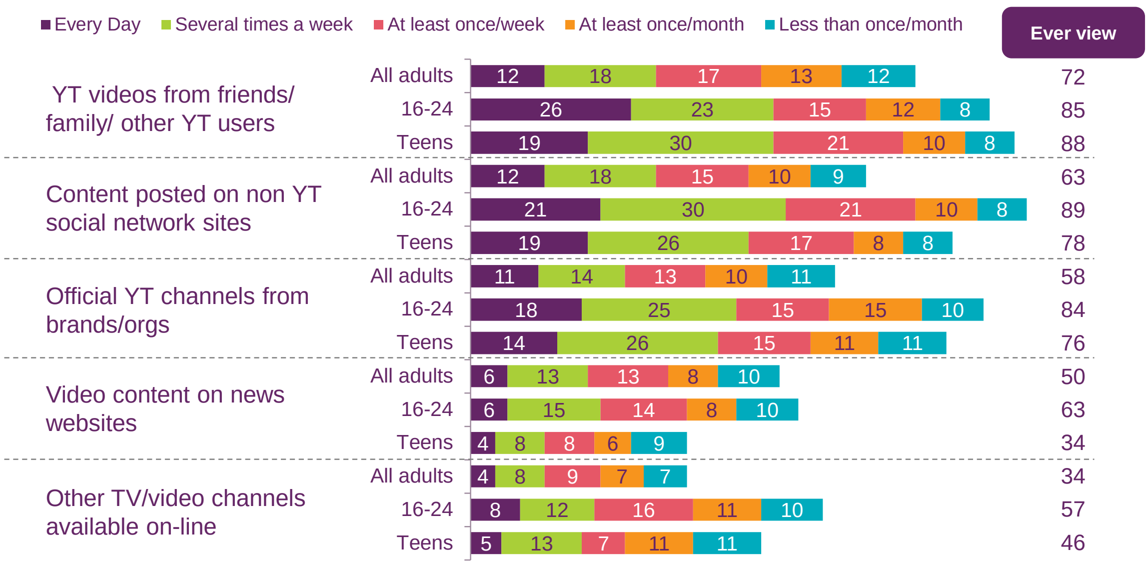
Figure 3.3 Frequency of using long-form on-demand and online services – all adults 16+, 16-24 year olds, teens comparison



Source: On-demand and online tracker 2014 online Q9 So looking at the following services, please could you say how often you typically watch each of these?
Base: All on-demand and online users: all adults 16+ (2678), 16-24 (446), teens (500)

For short-form viewing, teens are more likely than adults to 'ever use' each service, apart from video on news websites, with just one-third (34%) of teens using it, compared to half (50%) of adults. However, as Figure 3.4 shows, although young adults (aged 16-24) have similar levels of 'ever viewed' use for non-professional YouTube content, the proportion using all other short-form services is higher than among teens.

Figure 3.4 Frequency of using short-form on-demand and online services – all adults 16+, 16-24 year olds, teens comparison



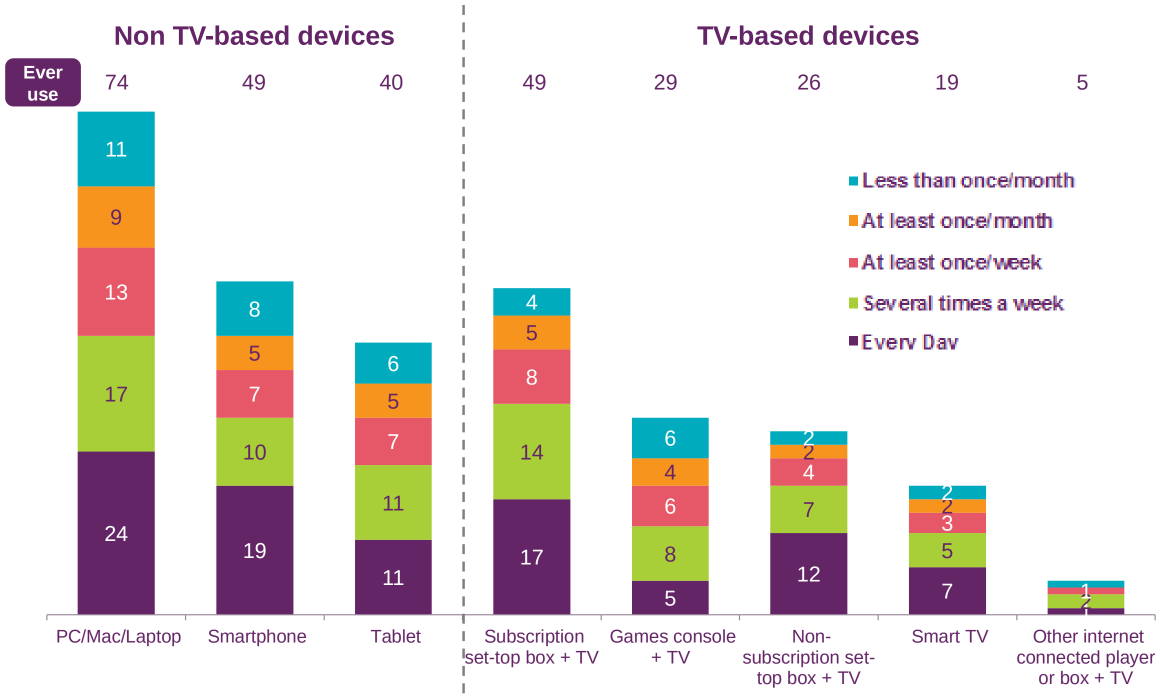
Source: On-demand and online tracker 2014 online Q9 So looking at the following services, please could you say how often you typically watch each of these?
Base: All on-demand and online users: all adults 16+ (2678), 16-24 (446), teens (500)

3.4 Overall frequency of using devices to view on-demand and online services

Overall, viewers of on-demand and online content are most likely to have used a non-TV-based device (i.e. one that has its own screen and does not need to be connected to a TV) to access online services; 74% have used a PC/Mac/laptop, 49% a smartphone and 40% a tablet (see Figure 3.5 below). However, a fifth of PC/Mac/laptop owners view on-demand and online content once a month or less.

Where on-demand and online viewing is TV-based, this is most commonly done via a subscription set-top box (49%), a games console (29%) or non-subscription set-top box (26%). A fifth (19%) of respondents claim to have viewed online content via a smart TV.

Figure 3.5 Frequency of use of devices to watch on-demand and online content among all on-demand and online users



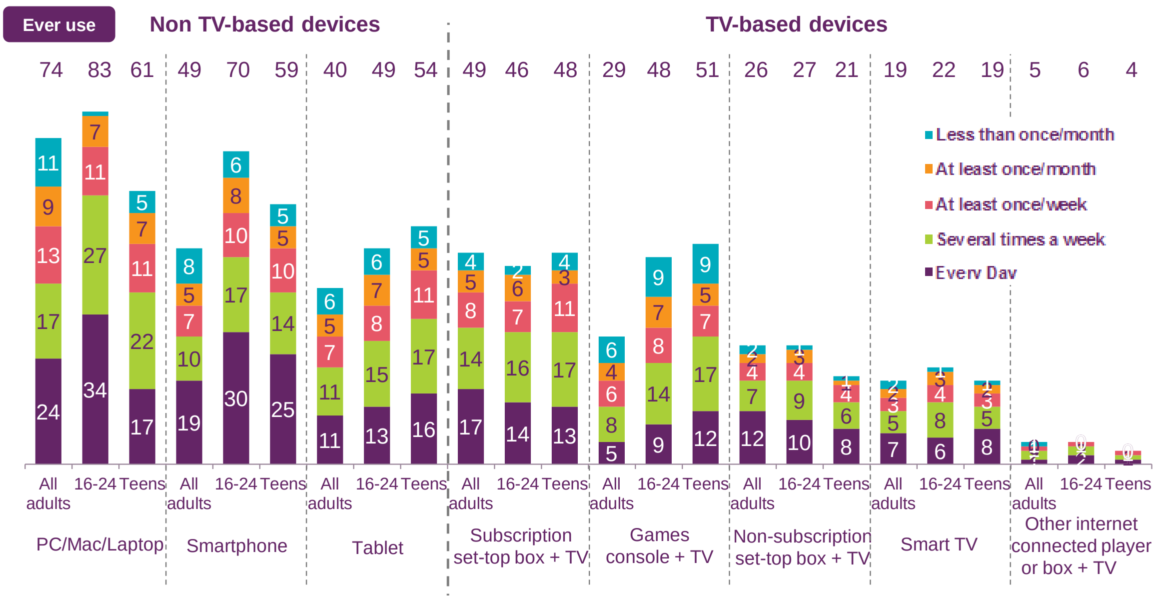
Source: On-demand and online tracker 2014 online Q10 How often do you personally use each of the following devices to view online or on-demand TV or video content at home or elsewhere?
Base: All on-demand and online users (2678)

The devices used by teens to watch online content follow a broadly similar pattern to adults overall and younger adults aged 16-24, but as seen in Figure 3.6, there are some notable differences:

- They use PCs/Macs/laptops less (61% of teens vs. 74% of all adults and 83% of 16-24 year olds ever use them).
- They use smartphones more than adults overall (59% of teens vs. 49% of all adults ever use them), but 16-24 year olds have even greater use (70% ever use them).
- They have higher use of tablets, compared to all adults, (54% of teens vs. 40% of all adults) and via a games console (51% of teens vs. 29% of all adults ever use them). This

aligns with similarly high use among 16-24 year olds (49% ever use tablets and 48% ever use games consoles).

Figure 3.6 Frequency of using of devices to watch on-demand and online content, all adults 16+, 16-24 year olds, teens comparison



Source: On-demand and online tracker 2014 online Q10 How often do you personally use each of the following devices to view online or on-demand TV or video content at home or elsewhere?
Base: All on-demand and online users (2678)

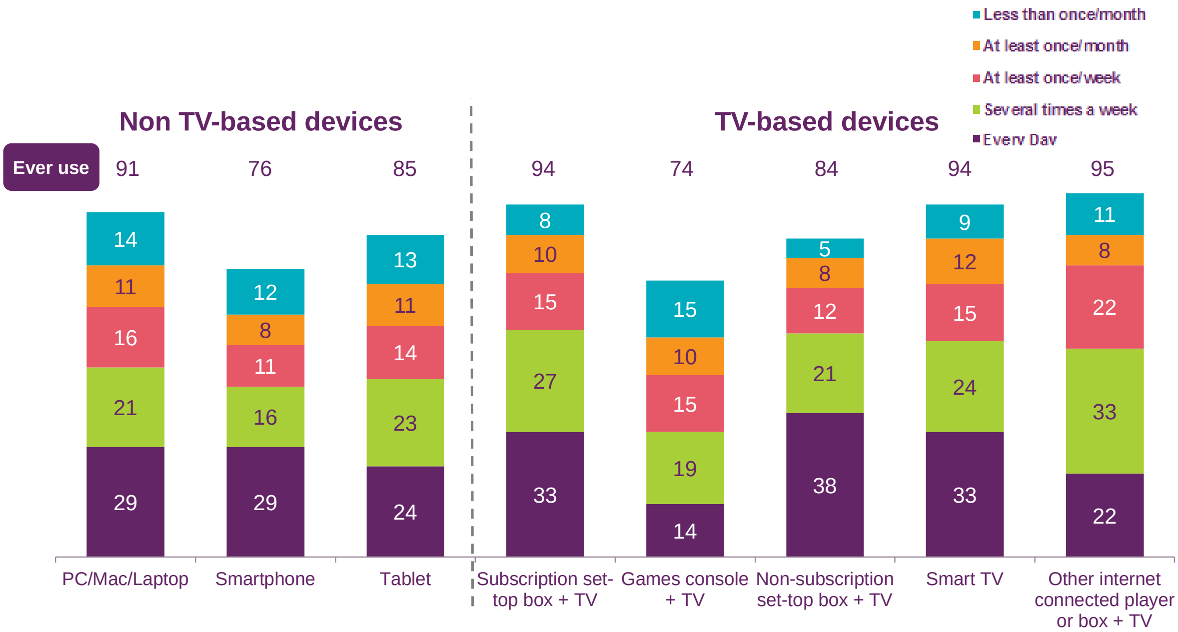
Figure 3.7 shows use of devices for viewing on-demand and online content among *owners* of each device.

Most owners of each connected device have used them to access online content. The devices with the highest use for accessing online content are miscellaneous internet connected players or boxes (95%), TV via subscription set-top boxes (94%) and smart TVs (94%).

Other devices commonly used to access online content are PCs/Macs/laptops (91%) and tablets (85%).

Lower levels of use are reported for those devices whose primary purpose is typically something other than viewing content – smartphones (76%) and games consoles (74%). However, these are still used by around three-quarters of owners to access online content.

Figure 3.7 Frequency of use of devices to watch on-demand and online content, among owners of each



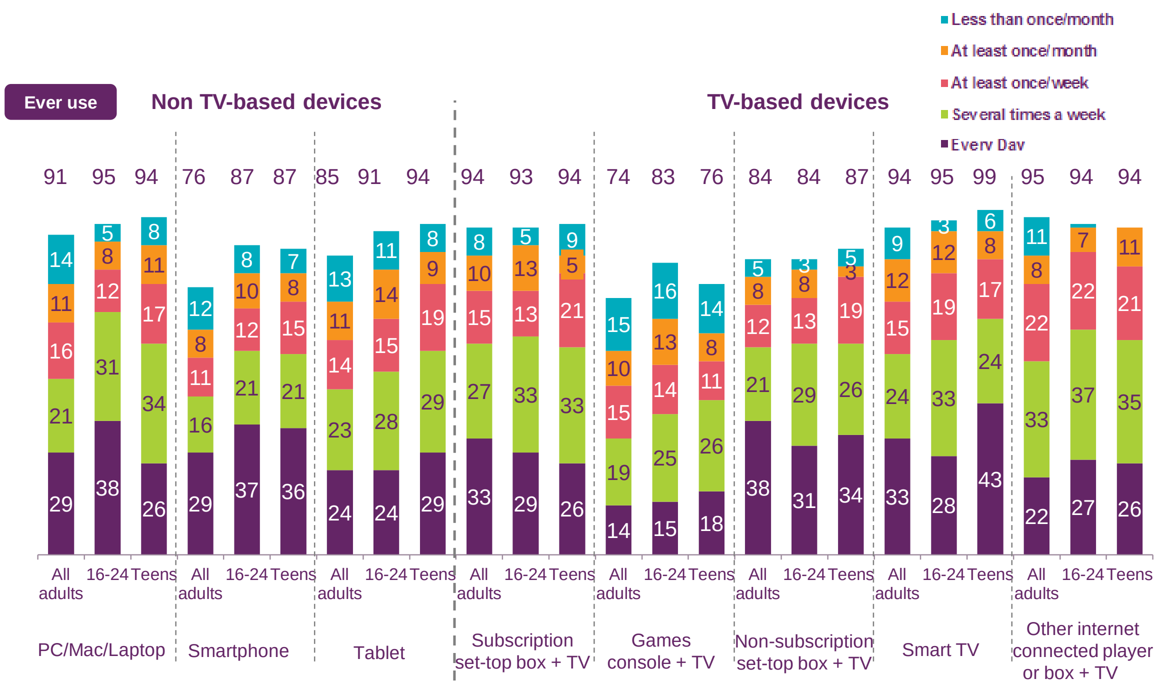
Source: On-demand and online tracker 2014 online Q10 How often do you personally use each of the following devices to view online or on-demand TV or video content at home or elsewhere?
Base: Users of each device: Other internet connected player or box + TV (139), Subscription set top box + TV (1385), Smart TV (551), PC/Mac/Laptop (2164), Tablet (1290), non-subscription set top box + TV (859), Smartphone (1685), Games console + TV (1020)

The most frequently used devices for on-demand and online content are non-subscription and subscription set-top boxes, both with around six in ten owners using them daily, or several times a week, for on-demand and online content.

Figure 3.8 shows that teen and adult owners of most devices have similar overall levels of use, and similar frequency of use, for on-demand and online content.

However, teen device owners are more likely to use their tablets and smartphones (94% of teens vs. 85% of adults ever use tablets, and 87% of teens vs. 76% of adults ever use smartphones). This is similar to the behaviour of younger adults (91% of 16-24 year olds ever use tablets and 87% ever use smartphones for on-demand and online content).

Figure 3.8 Frequency of use of devices to watch on-demand and online content among owners of each: all adults 16+, 16-24 year olds, teens comparison



Source: On-demand and online tracker 2014 online Q10 How often do you personally use each of the following devices to view online or on-demand TV or video content at home or elsewhere?
Base: Users of each device: Other internet connected player or box + TV (139/27/21*), Subscription set top box + TV (1385/224/256), smart TV (551/103*/101*), PC/Mac/Laptop (2164/388/327), Tablet (1290/245/287), non-subscription set top box + TV (859/138/121), Smartphone (1685/356/342), Games console + TV (1020/248/331) *Effective base <100*

3.5 Devices used for viewing individual on-demand and online services

Users of each individual online service were asked which devices they used to access it. Figure 3.9 shows the devices used to access content from each service.

Long-form content shows notable variation in the devices used to access it. For the two long-form services most closely related to ‘regular’ TV viewing (free and paid VOD from TV providers), the main platform is accessing on a TV via a subscription set-top box (51% and 43% respectively). Nevertheless, the PC/Mac/laptop still plays a significant role here: around a quarter (24% for free VOD) and a fifth (22% for paid VOD) access each service this way.

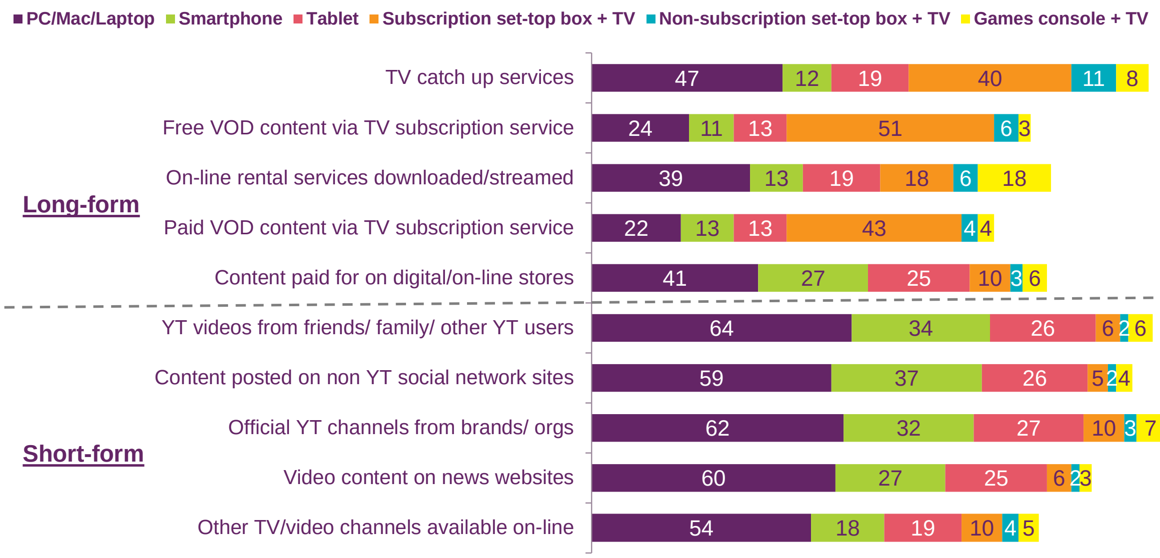
TV catch-up services have the widest mix of devices for access. Around half (47%) of respondents had accessed these services via a PC/Mac/laptop, while 40% have accessed them on a TV via a subscription set-top box and 11% via a non-subscription set-top box. One in five (19%) had viewed TV catch-up content via a tablet, and one in ten (11%) via a smartphone.

The remaining long-form services are accessed more via non-TV based platforms:

- Paid content from online stores is accessed on a PC/Mac/laptop by 41% and on a smartphone or tablet by around a quarter each (27% and 25% respectively).
- Online video rental, while largely accessed via non-TV based devices (39% PC/Mac/laptop, 19% tablet, 13% smartphone), has a sizable proportion using a TV, through a subscription set-top box (18%) or non-subscription set-top box (6%) or a games console (18%).

At least half of users of each short-form service have done so via a PC/Mac/laptop, around one-third have used a smartphone and around one-quarter a tablet, for most services. The exception to this is other TV or video channels available online, which have lower tablet and smartphone use (around one-fifth each).

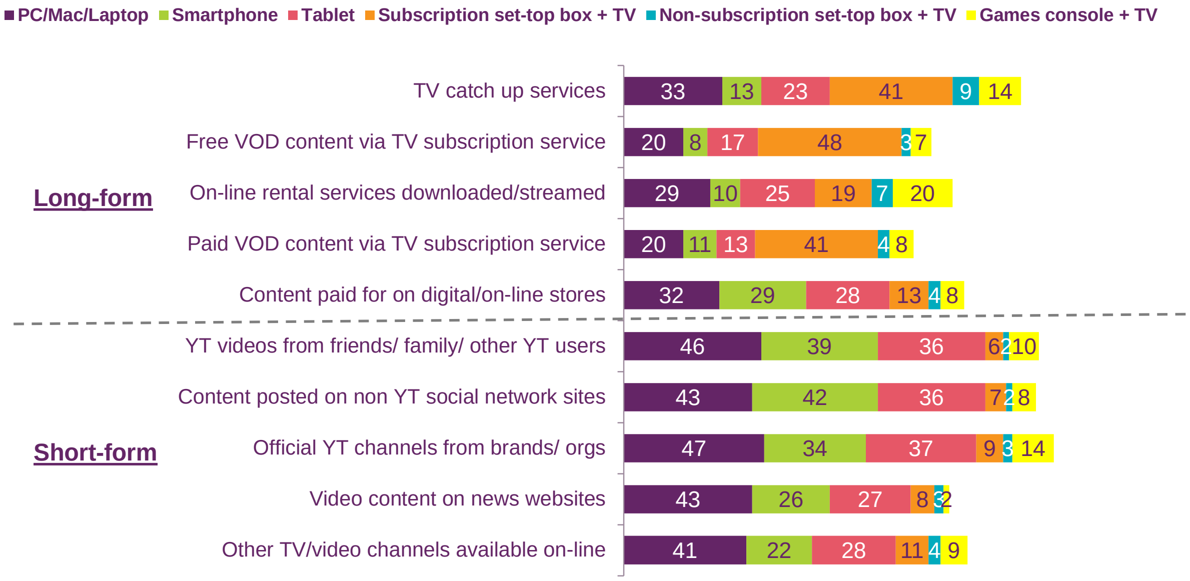
Figure 3.9 Devices used to watch individual on-demand and online services, among adult users of each service



Source: On-demand and online tracker 2014 online Q11 And which of these devices do you view each of these services on?
Base: Users of each service: TV catch up services (2128), Free VOD content via TV subscription service (1298), Paid VOD content via TV subscription service (837), On-line rental services downloaded/streamed (1017), Content paid for on digital/online stores (835), Other TV/video channels available online (946), Official YT channels from brands/ orgs (1653), Video content on news websites (1435) YT videos from friends/ family/ other YT users (1952), Content posted on non YT social networking sites (1715)

Figure 3.10 shows that teens are less likely to access most on-demand and online services via a PC/Mac/laptop than younger adult users (aged 16-24) and adult users overall. The exceptions to this are free and paid VOD from TV service providers. Teens are more likely to access most short-form content via a tablet (in particular, short-form social networking-based content). In all other respects their use is similar to the adult population aged 16+.

Figure 3.10 Devices used to watch individual on-demand and online services, among teen users of each service



Source: On-demand and online teens tracker 2014 online Q11 And which of these devices do you view each of these services on? Base: Users of each service: TV catch up services (418), Free VOD content via TV subscription service (282), Paid VOD content via TV subscription service (183), On-line rental services downloaded/streamed (208), Content paid for on digital/online stores (205), Other TV/video channels available online (234), Official YT channels from brands/ orgs (384), Video content on news websites (176), YT videos from friends/ family/ other YT users (437), Content posted on non YT social networking sites (389)

Annex A provides a side-by-side comparison of device use among teens, 16-24s and all adults.

4. On-demand and online content causing concern

4.1 Key findings

- Overall, around a tenth (11%) of online content viewers aged 16+ have seen something of concern on an on-demand or online service.

- Having seen something of concern correlates with age, with the highest incidence of concern among the younger age groups (16% among 12-15s and 16-34s). This also correlates with the level of on-demand and online service use, which implies that greater levels of use leads to higher levels of potential exposure to concerning content.

- Adults' top three concerns (among those that report seeing concerning content) relate to violence (39%), sex (30%) and bad language (27%), the same as those measured for broadcast television[6]. Other substantial areas of concern include the welfare of children and young people (26%), discrimination (22%) and online bullying/victimisation (21%). Dangerous behaviour (18%) and suicide (14%) are also mentioned by around one in six adults with concerns.

- The types of content perceived to be harmful to children are broadly in line with the types causing concern, although misleading advertising, defamation and infringement of privacy are seen to be relatively less harmful.

- **Parents** are significantly more likely than non-parents to have been concerned by on-demand and online content (17% vs. 8%), but are no more likely to be concerned about any particular type of content, apart from pornography (22% vs. 14%). They are more likely to take action by making a complaint (35% make a complaint compared to 25% of those without children), by either complaining to the provider (29% vs. 17%) and/or complaining to a third-party body (19% vs. 11%).

- The top three types of concerning content seen by teens also relate to bad language (37%) bullying and victimisation of themself or others (also 37%), and violence (33%). Other concerns for teens include: cruelty to animals (24%), seeing things that are too old for them (24%), things of a sexual nature (23%), sad/frightening/embarrassing things (23%), dangerous behaviour (21%), suicide (19%), drugs/drug use (19%),

---

[6] http://stakeholders.ofcom.org.uk/market-data-research/other/tv-research/attitudes-to-broadcast-media/

content harmful to their self-esteem (18%), gossip being spread even if it isn't true (18%) and trolling/online harassment (17%).

- The most common response (50%) to concerning content is to stop viewing the specific content, but to continue using the service. A third of adults that have seen something of concern (31%) claim to have made a complaint either to the content provider (24%) or to a third-party body (15%). Teens are most likely to have stopped viewing (65%) or told their parents (64%) when seeing something of concern. Three-fifths (60%) of those who stopped viewing also told their parents.

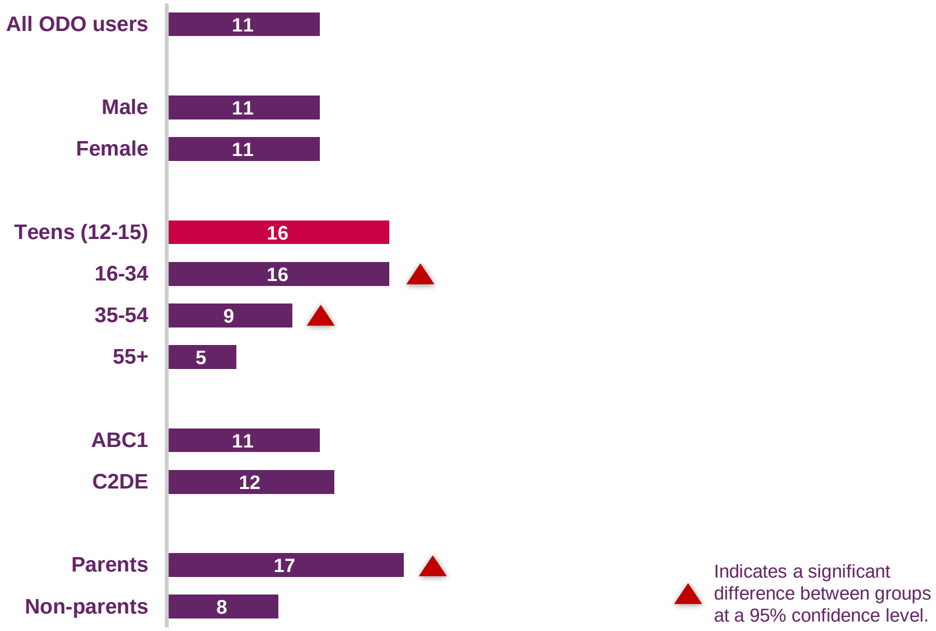
4.2 Incidence of concern

Overall, around a tenth (11%) of on-demand and online users have seen something of concern on an on-demand and online service (Figure 4.1). Younger people and parents are significantly more likely to have seen something of concern.

Incidence of seeing something of concern is correlated with age, with the highest proportion among the younger age groups; 16% among teens and young adults (16-24), and 15% among 25-34s. Moving further up the age bands, incidence of concern begins to drop off; to 9% among 35-54 year olds and 5% among those aged over 55. This also correlates with the level of on-demand and online service use, which implies that greater levels of use lead to higher levels of potential exposure to concerning content.

Parents are significantly more likely than non-parents to have been concerned by on-demand and online content (17% vs. 8%).

Figure 4.1 Percentage seeing something of concern on an on-demand and online service



Source: On-demand and online tracker 2014 online / on-demand and online teens 2014 online Q12 Has anything that you have seen on any online or on-demand service caused you any concern?
Base: All on-demand and online users: online 2014 (2678), on-demand and online teen users (500)

4.3 Types of concern

Types of concern are shown at Figure 4.2. The main types of content causing concern among adults on online services are violence, sex and bad language (39%, 30% and 27% respectively of those concerned). This reflects the top three areas causing offence on broadcast television[7]. Other substantial areas of concern for adults include the welfare of children and young people (26%), discrimination (22%) and online bullying/victimisation (21%). Dangerous behaviour (18%) and suicide (14%) are mentioned by around one in six adults with concerns.

Young adults (aged 16-24) are significantly less likely than adults to mention bad language (17% compared to 27% among all adults).

Being a parent has little impact on the types of content perceived to be concerning – parents are no more likely than non-parents to be concerned about any particular type of content, apart from pornography (22% vs. 14%).

---

7 http://stakeholders.ofcom.org.uk/binaries/research/statistics/2014apr/Ofcom_Media_Tracker_Survey_2013_data_tables.pdf

Women are more likely than men to have been concerned about the welfare of children or young people (32% vs. 19%), and men are more likely to have been concerned about suicide (18% vs. 10%). See Annex A, 6.4 for parental and age sub-group analysis.

The main concerns among teens also relate to bad language (37%) and violence (33%).The third most-mentioned concern is bullying or victimisation of others (29%). When combined with those mentioning bullying or victimisation of themselves (16%), nearly two-fifths (37%) of teens mention some type of bullying as a concern, equal to bad language.

Other concerns for teens include: cruelty to animals cited by 24% of concerned teens, seeing things that are too old for them (24%), things of a sexual nature (23%), sad/frightening/embarrassing things (23%), dangerous behaviour (21%), suicide (19%), drugs/drug use (19%), content harmful to their self-esteem (18%), gossip being spread even if it isn't true (18%) and trolling/online harassment (17%).

Figure 4.2 Types of concern among those reporting concern - all adults 16+, 16-24 year olds, teens

Source: On-demand and online tracker 2014 online Q13 What kind of thing caused you concern on the online or on-demand TV or video content you saw?
Base: All on-demand and online users seeing something of concern: adults 16+ (471), 16-24 (114), teens (85) *Effective base size <100*
***Includes Discrimination (e.g. based on age, gender, disability, religious/non-religious beliefs) and Offence of religion*

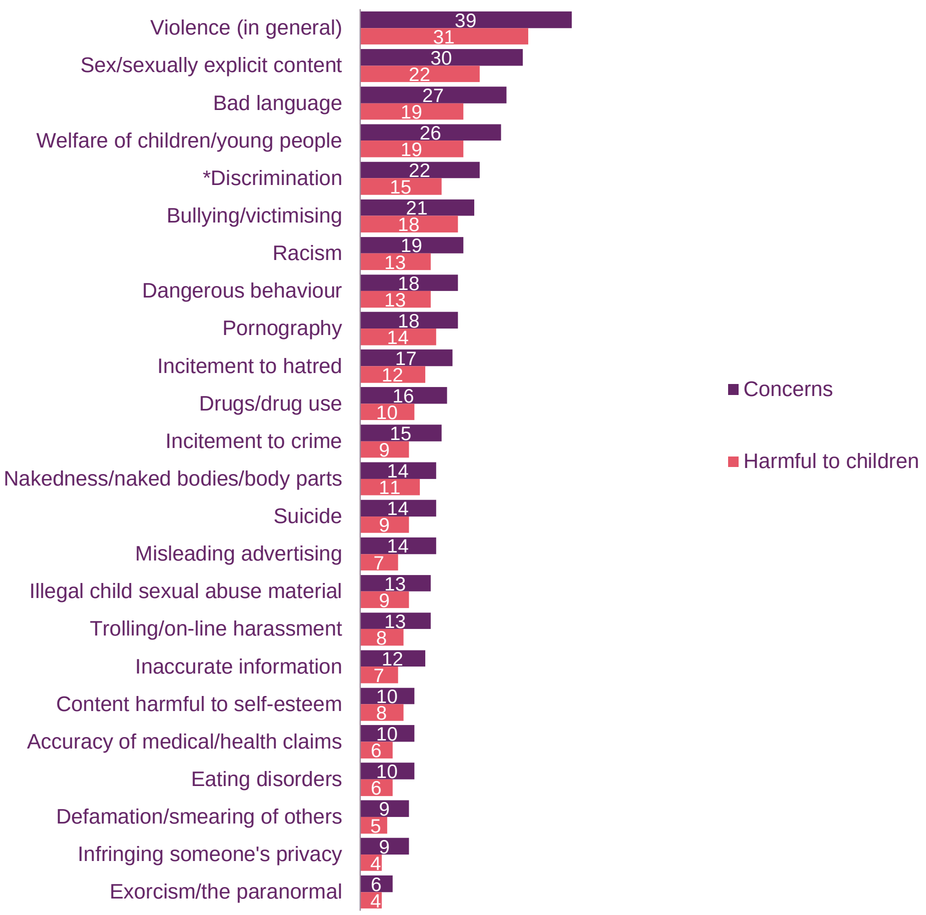
Respondents were also asked whether they thought the things that had concerned them were offensive. The pattern of issues mentioned very closely follows that for concern. See Annex A, 6.8 for further details.

4.4 Content seen as harmful to children

For those types of content that adults had seen that they found *concerning*, they were then asked which they also thought could be *harmful to children.*

The types of content perceived to be harmful to children are broadly in line with the types causing concern, but to a lesser degree (Figure 4.3).

Figure 4.3 Content that caused concern and perceived to be harmful to children (prompted) among all with concerns



Source: On-demand and online tracker 2014 online Q13 What kind of thing caused you concern on the online or on-demand TV or video content you saw?/ Q13C Thinking about the things you have seen that have concerned you, which of these do you think could be harmful to children?
*Base: All with concerns (471) *Includes discrimination (e.g. based on age, gender, disability, religious/non-religious beliefs) and offence of religion*

4.5 Reaction to seeing concerning content

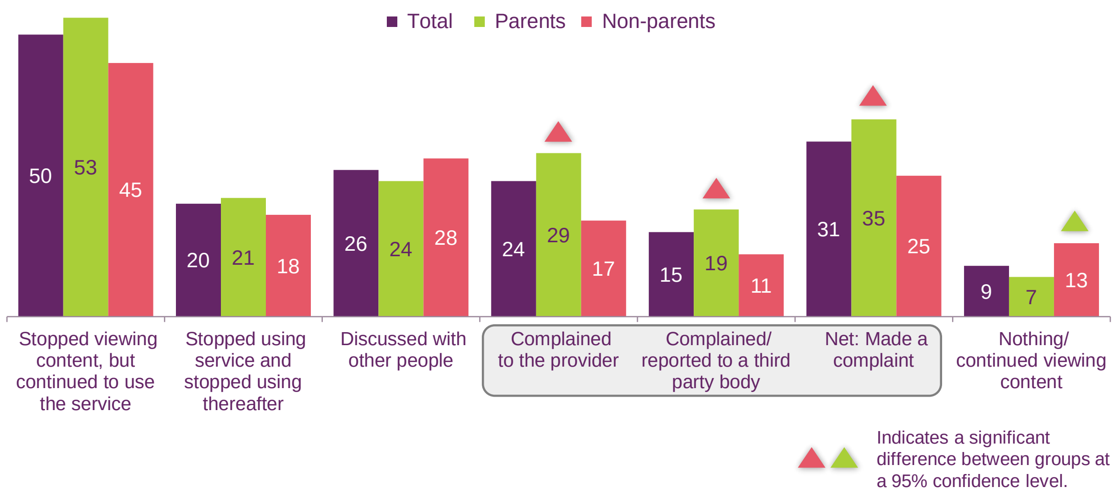
The most common response to seeing concerning content on an on-demand and online service is to stop viewing the specific content, but to continue using the service (50% of those with concerns have done this). A third (31%) claim to have made a complaint either to the content provider (24%) or to a third-party body (15%).

The third-party organisations contacted include:

- BBFC (British Board of Film Classification): 23%
- BSC (Broadcasting Standards Commission):14%
- MediaWatch/National Viewers and Listeners Association: 13%
- Ofcom: 11%
- ASA (Advertising Standards Authority): 10%
- ATVOD (Authority for Television On Demand): 8%
- The BBC Trust: 7%
- The Government: 3%

Figure 4.4 shows that parents are more likely to take action; overall, 35% of those with children claim to have made a complaint (compared to 25% of those without children), with 29% complaining to the provider and 19% to a third-party body (compared to 17% and 11% of those with no children).

Figure 4.4 Claimed reaction to concerning content: parents and non-parents with concerns

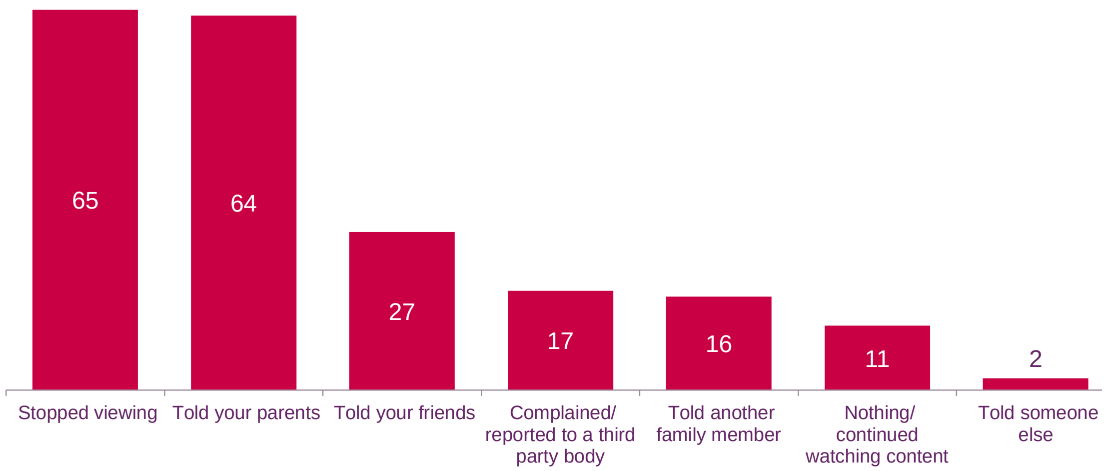


Source: On-demand and online tracker 2014 online Q15 How have you generally reacted when you have seen something that caused you concern? Base: All who have seen something of concern on an on-demand and online service (471), parents (256), non-parents (215)

Those without children are more likely to have done nothing (13% compared

Teens who have seen something of concern are most likely to have stopped viewing (65%) or told their parents (64%). Three-fifths (60%) of those who stopped viewing also told their parents (Figure 4.5). A similar proportion as for adults were likely to have done nothing and continued watching.

Figure 4.5 Claimed reaction to concerning content, among on-demand and online teens with concerns



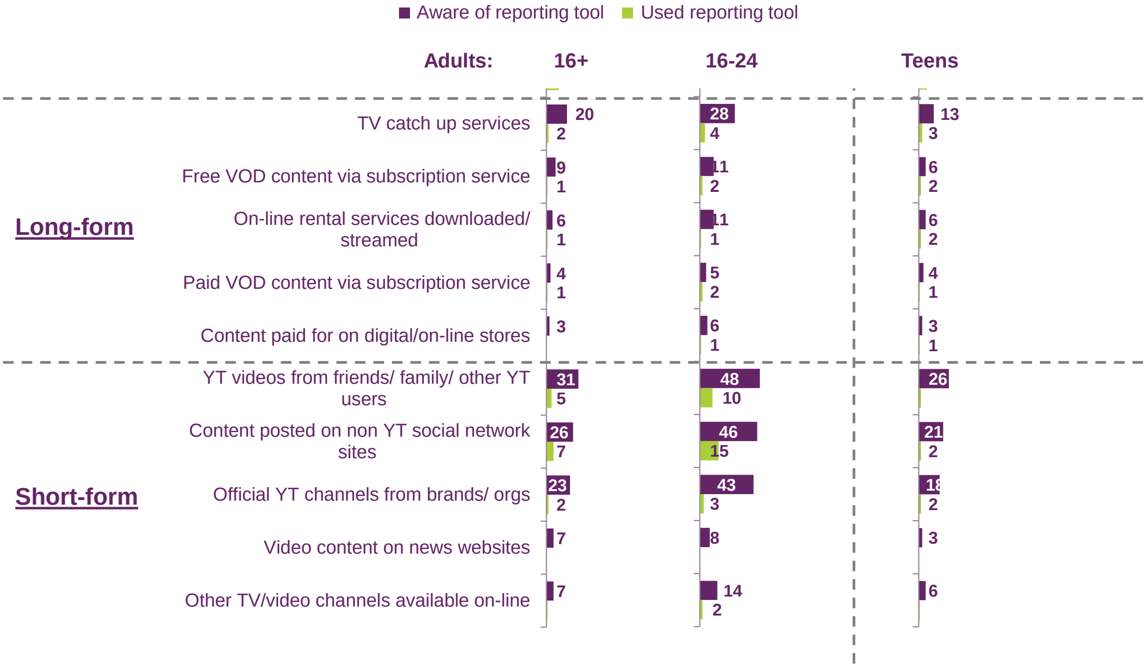
Source: On-demand and online teens tracker 2014 online Q15. How have you generally reacted when you have seen something that caused you concern?
Base: All teen on-demand and online users with concerns (85) *Effective base <100*

4.6 Awareness and use of reporting tools

Awareness of reporting tools for short-form services (that are less TV-like) tends to be higher than for long-form services (see Figure 4.6). At least one in five claims to be aware of tools for non-professional YouTube content (31%), non-YouTube social networking site content (26%) and official YouTube channels (23%). Of the long-form services, only TV catch-up has a comparable proportion who is aware (20%).

Awareness and use of these tools among the teen sample is similar to all adults overall. However, awareness and use is substantially higher among adults aged 16-24, particularly for short-form services.

Figure 4.6 Claimed awareness and use of reporting tools - all adults 16+, 16-24 year olds, teens comparison



Source: On-demand and online tracker 2014 online Q21 Some services provide tools to report online or on-demand TV or video content. Have you ever seen this type of reporting tool on any of the services that you use? / Q22 Have you ever reported content on each service using its reporting tool?
Base: All on-demand and online users online (2678), All 16-24 on-demand and online users (446), All teen on-demand and online users online (500)

5. Opinions on the regulation of on-demand and online content

5.1 Key findings

- There is mixed understanding of regulation in the on-demand and online environment. Users assume higher levels of regulation among services which provide more **TV-like** content[8].

- TV catch-up services have the highest proportion correctly identifying them as being regulated (63% of all aware of them). The perception that services are regulated is lower for more 'non-professional' content. People are more likely than not to correctly state that those services delivering largely short-form user-generated content are unregulated. There are high levels of mis-attribution for unregulated services that deliver more professional types of short-form content; in particular, video on news websites. Younger adult users are more likely to assume incorrectly that services are regulated, particularly for more niche, less TV-like servicesBearing in mind the mixed understanding and lack of detailed knowledge, the majority of online users claim to feel that current levels of regulation are about right (46%), or don't have an opinion (32%). Opinions differ significantly among people who have seen something of concern; they are more than twice as likely as those that have not seen something of concern to say there is too little regulation (35% vs. 14%).

- Users wrongly perceive there to be differences in whether content is regulated if viewed on different devices. Perceived regulation is highest for devices used to access content via a TV set, and drops off for more 'personal computing-type' devices, reflecting the higher perceived regulation for TV-like services. This belief in the existence of differing levels of regulation by device contrasts with the desire for consistency of regulation across devices.

- When considering whether services should be regulated, around two in five (41%) feel that on-demand and online content overall *should* be regulated. Parents and females feel more strongly that there should be regulation.

[8] The survey offered a description of regulation: *By regulation we mean rules and regulations put in place by the Government/ an independent regulatory body about what can and cannot be shown.*

- Responsibility for regulating on-demand and online services is most commonly thought to lie with content providers themselves. Of the third-party bodies, Ofcom and the ASA[9] are the most mentioned. Younger people tend to be more likely to feel that responsibility is down to self-regulation by the content providers or the creators themselves.

5.2 Perception that on-demand and online services are regulated

On the whole, there is mixed understanding of regulation in the on-demand and online environment[10].

The extent to which respondents are able correctly to identify whether an on-demand and online service is (or is not) regulated relates to how TV-like the content is (the more TV-like it is, the higher the proportion of respondents who know it is regulated). TV catch-up services have the highest proportion correctly identifying them as being a regulated service (63%). The other TV-like, long-form services follow closely behind.

The perception that services are regulated is lower for the more 'non-professional' types of content. Respondents are more likely than not to state correctly that those delivering largely short-form, user-generated content are unregulated, i.e. non-professional YouTube content (40% know it is not regulated vs. 22% believe it is) and content on non-YouTube social networking sites (41% know it is not vs. 20% believe it is).

There is greater confusion for services that deliver more professional short-form content, some of which may be content that has been previously broadcast on a regulated service, i.e. other online TV/video channels (29% think it is regulated vs. 22% know it is not) and on official YouTube channels (41% think it is vs. 19% know it is not).

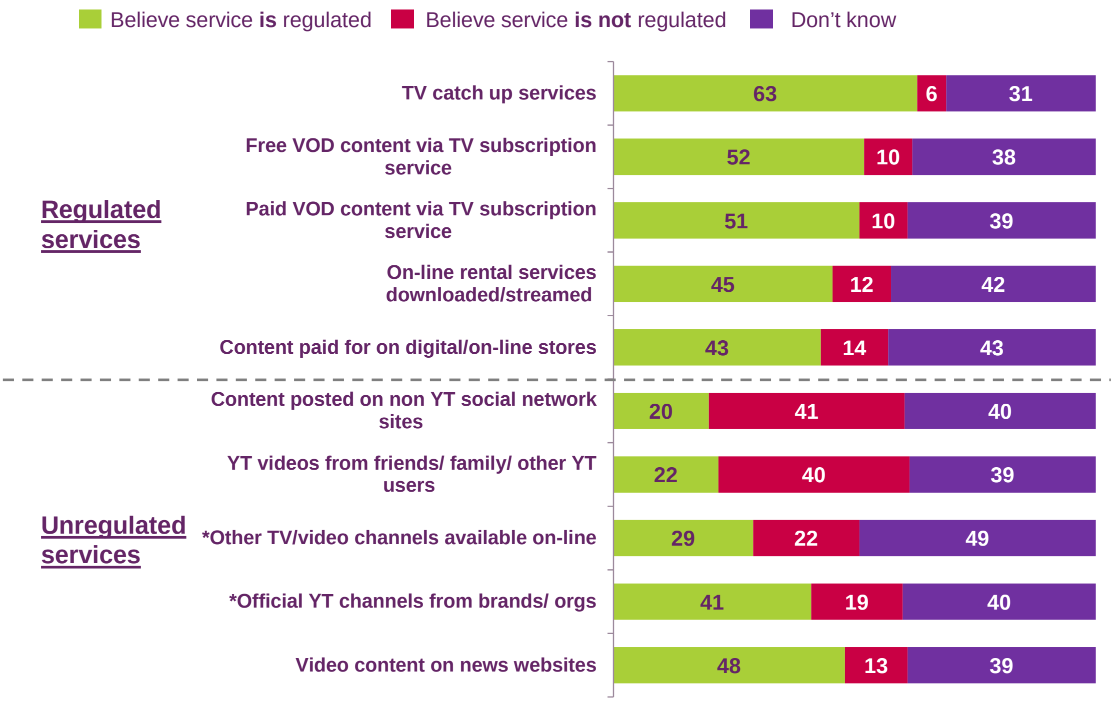
The greatest level of mis-attribution is for video on news websites (48% believe that it is vs. 13% who know it is not).

People with children are more likely to believe that each on-demand and online service is regulated (apart from official YouTube channels and other online TV/video channels) (see Annex A, 6.15).

Younger adult users tend to be more likely to believe that all services are regulated, particularly for more niche, less TV-like on-demand and online services (see Annex A, 6.15).

[9] Advertising Standards Agency
[10] The survey offered respondents a description of regulation: *By regulation we mean rules and regulations put in place by the Government/ an independent regulatory body about what can and cannot be shown.*

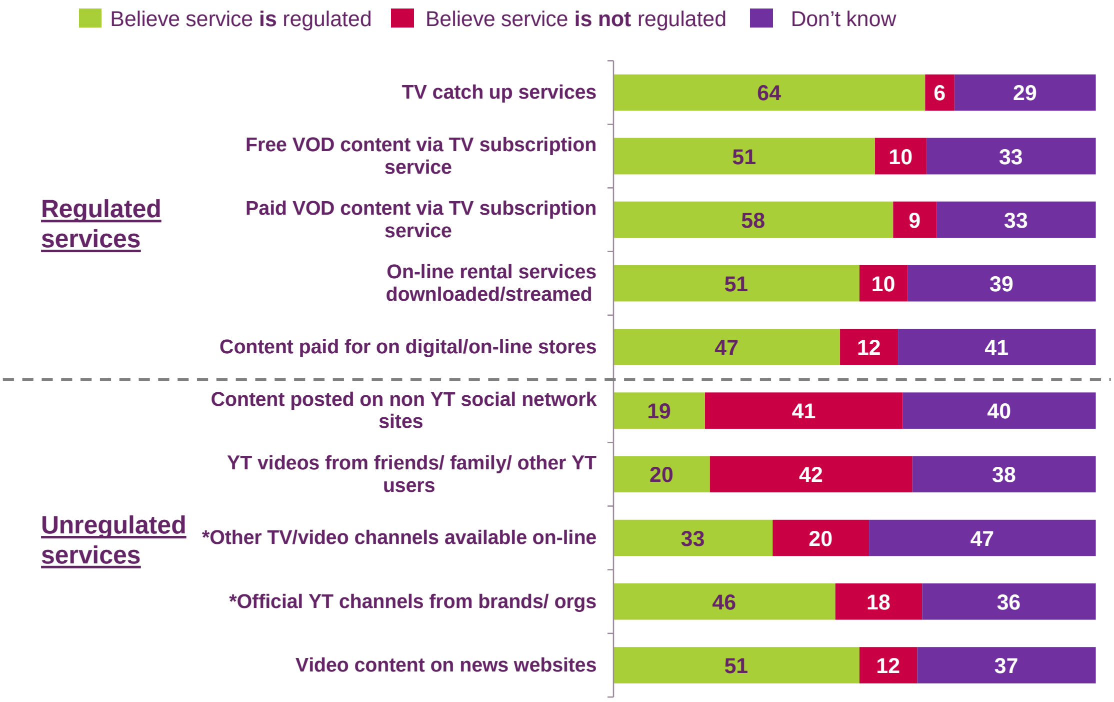
Figure 5.1 Perception that individual services are regulated: adults



Source: On-demand and online tracker 2014 online Q18 As far as you know, are each of the following services regulated?
Base: All aware of each service: TV catch up services (2605), Free VOD content via TV subscription service (2415), Paid VOD content via TV subscription service (2419), Video content on news websites (2381), On-line rental services downloaded/streamed (2513), Content paid for on digital/online stores (2333), Official YT channels from brands/ orgs (2465), Other TV/video channels available online (2039), YT videos from friends/ family/ other YT users (2532), Content posted on non YT social networking sites (2490)
**N.B. Most (but not all) content on these types of services is not subject to third-party regulation*

The proportion of teens believing that each service is regulated is very similar to the proportion of adults. Figure 5.2 shows that teens correctly identify or mis-identify services as regulated or unregulated in nearly identical proportions to adults overall. However, compared to adults they are more likely to correctly state that paid VOD from a TV provider is regulated (58% of teens vs. 51% of all adults) and that online video rental is regulated (51% of teens vs. 45% of all adults).

Figure 5.2 Perception that individual services are regulated: teens



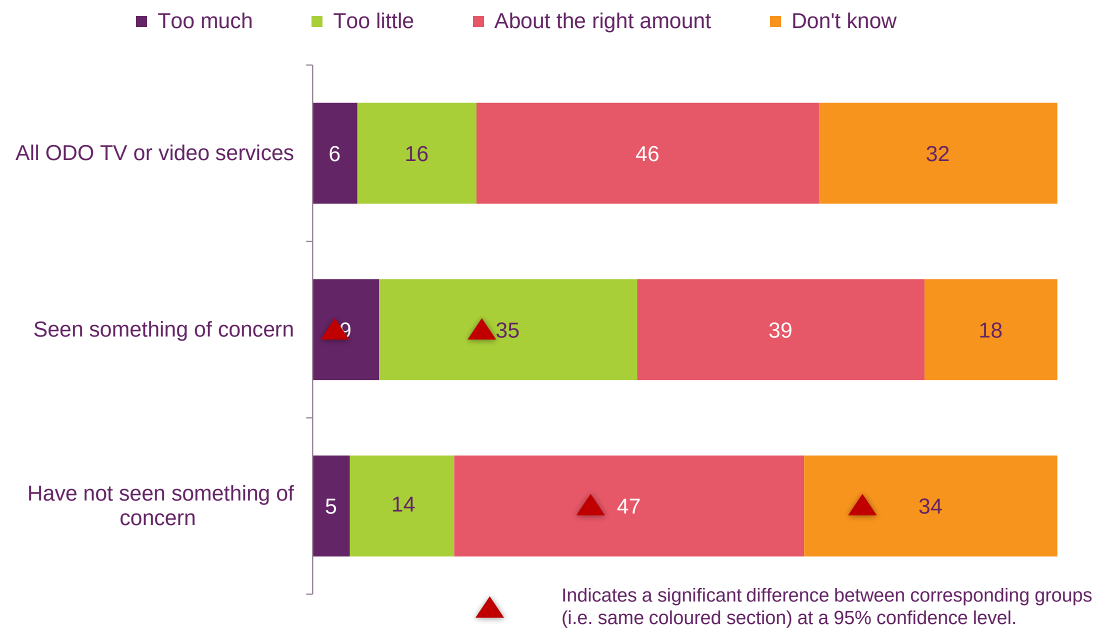
Source: On-demand and online tracker 2014 online Q18 As far as you know, are each of the following services regulated?
Base: All teens aware of each service: TV catch up services (483), Free VOD content via TV subscription service (444), Paid VOD content via TV subscription service (439), Video content on news websites (370), On-line rental services downloaded/streamed (455), Content paid for on digital/online stores (443), Official YT channels from brands/ orgs (481), Other TV/video channels available online (402), YT videos from friends/ family/ other YT users (483), Content posted on non YT social networking sites (469)
N.B. Most (but not all) content on these types of services is not subject to third-party regulation

5.3 Opinion on the perceived level of regulation

Bearing in mind the mixed understanding and lack of detailed knowledge in this area, the majority of online users claim to feel that current levels of regulation are about right (46%), or don't have an opinion (32%).

However, opinions are significantly different among people who have seen something of concern (Figure 5.3). They are more than twice as likely as those that have not seen something of concern to say there is too little regulation (35% vs. 14%).

Figure 5.3 Opinion on current levels of regulation



Source: On-demand and online tracker 2014 online Q20 Do you think the amount of regulation for each of the following is too much, too little or about the right amount?
Base: All on-demand and online users online (2678), All with concerns (471), All with no concerns (2048)

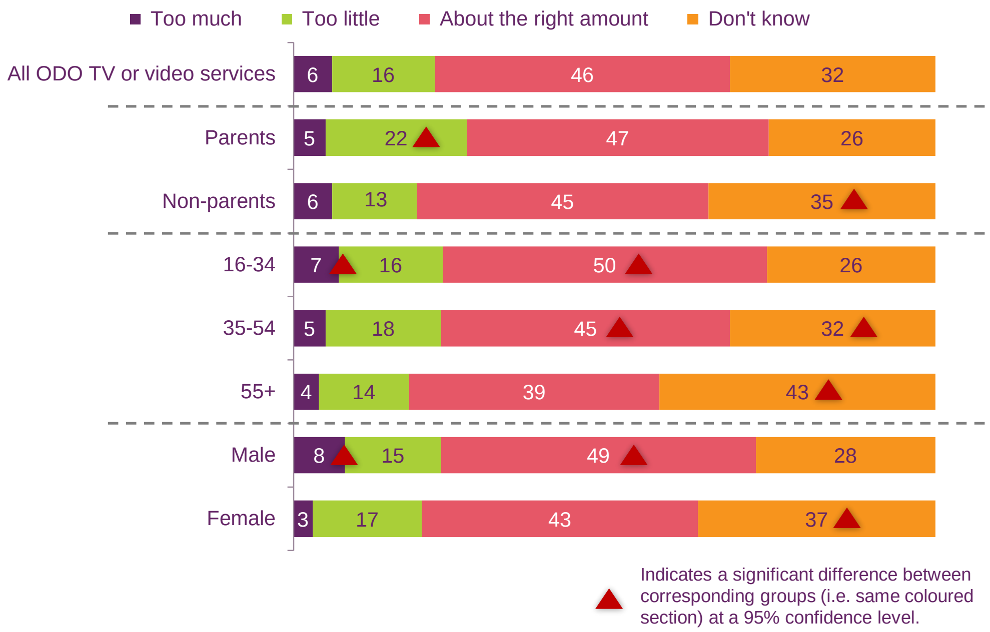
Significantly more parents feel there is ‘too little’ regulation of this type of content (22% compared to 13% among non-parents).

Men are more likely to express an opinion about the level of regulation, and say there is either ‘too much’ (8% among males vs. 3% among females), or that the current level of regulation is ‘about right’ (49% among males vs. 43% among females).

Those aged 55% + are more likely than younger age groups to not know/ not have an opinion.

There are no significant differences between teens and adults (see Annex A, 6.10).

Figure 5.4 Opinion on current levels of regulation, by parents vs. non-parents, age and gender



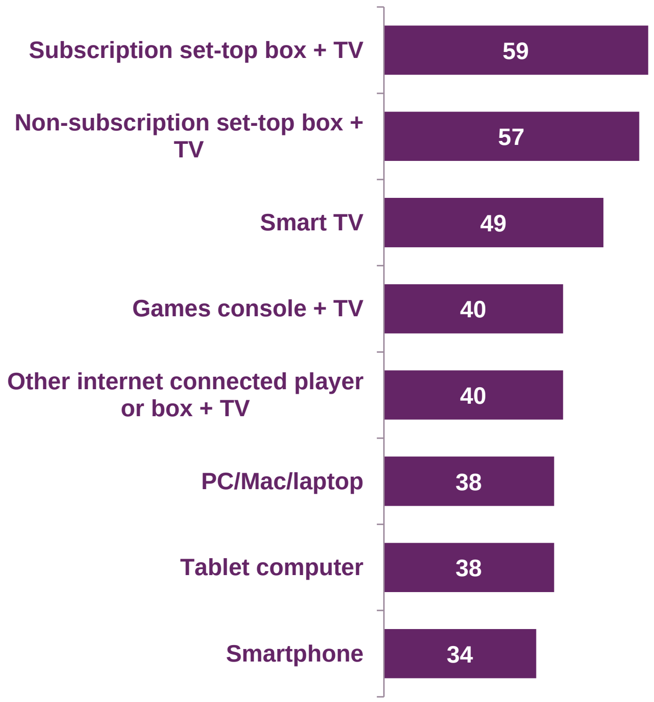
Source: On-demand and online tracker 2014 online Q20 Do you think the amount of regulation for each of the following is too much, too little or about the right amount?
Base: All on-demand and online users online (2678), parents (942), non-parents (1736), 16-34 (1039), 35-54 (974), 55+ (665), Male (1275), Female (1403)

5.4 Regulation of devices when used for on-demand and online content

Perceptions that on-demand and online content is regulated at the device level vary by device (Figure 5.5). Perceived regulation is highest for devices used to access on-demand and online content via a TV set and drops off for more ‘personal computing-type’ devices (like smartphones and tablets), reflecting the higher perceived regulation for TV-like on-demand and online services.

Over half of users of set-top boxes (both subscription and non-subscription) used to access on-demand and online content via a TV think that content delivered via these devices is regulated (59% and 57% respectively). At the bottom of the scale are the main non-TV-set-based devices: PC/Mac/laptop (38%), tablet (38%) and smartphone (34%).

Figure 5.5 Belief that on-demand and online content is regulated when viewed on each device listed



Source: On-demand and online tracker 2014 online Q23B As far as you know, do you think regulation applies to the kind of online and on-demand TV/video content we've been talking about when you view it on each of the following devices? Base: All users of each device for on-demand and online content: Subscription set-top box (1311), non-subscription set-top box (730), smart TV (518), Games console (759), Other internet connected player or box (130), PC/Mac/Laptop (1976), Tablet (1115), Smartphone (1294)

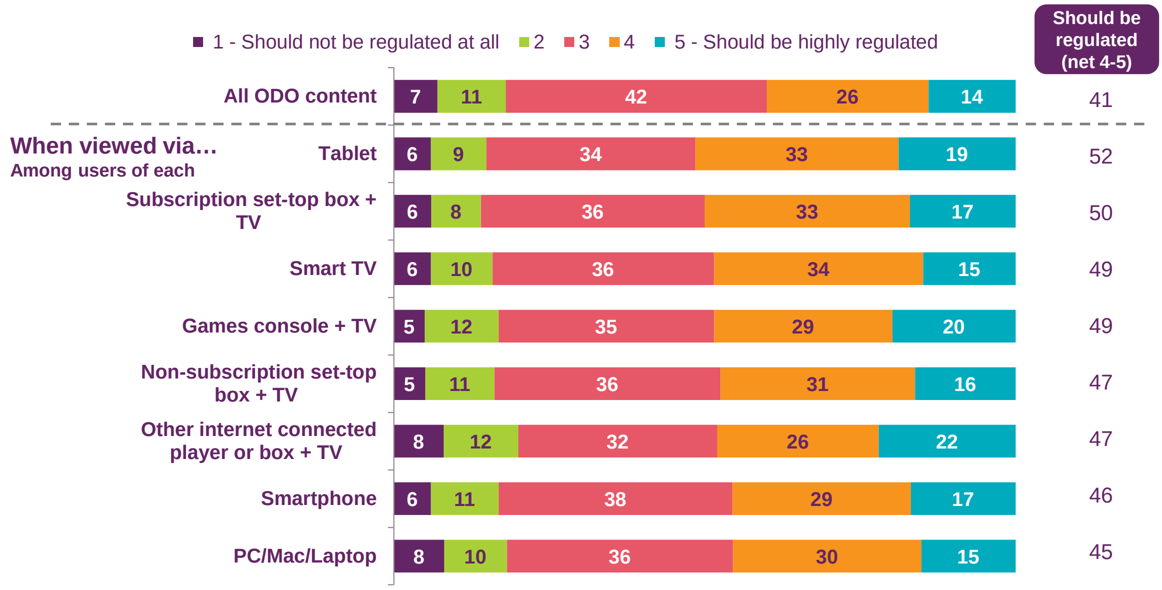
5.5 Desired level of regulation of on-demand and online content

When considering whether services *should* be regulated, a large minority (41%) feel that on-demand and online content overall should be.

As Figure 5.6 illustrates, when asked how much regulation they think there should be for on-demand and online content overall (on a scale of 1 to 5, with 5 being highly regulated), the largest proportion of users of on-demand and online content (42%), score in the middle of the scale, although a similar proportion (41%) feel more strongly that the content should be regulated (i.e. they selected 4 or 5).

There is a desire for largely consistent regulation of on-demand and online content by device.

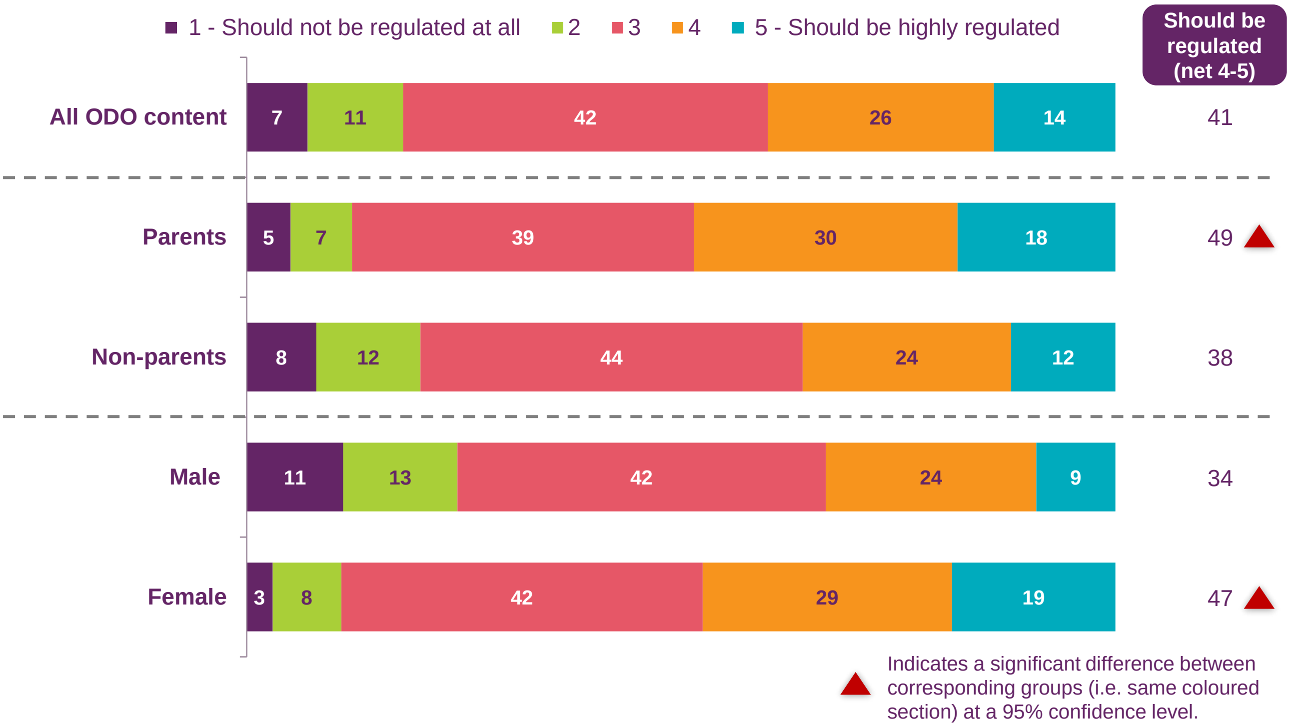
Figure 5.6 Desired level of regulation of on-demand and online content



*Source: On-demand and online tracker 2014 online Q17 Thinking about all the types of online and on-demand TV or video content you are aware of, please can you say how much regulation **there should be** on a scale of 1 to 5? / Q23a What level of regulation do you think there should be when people watch these services on each device on a scale of 1 to 5?*
Base: All on-demand and online users online (2678), all ever using […] for on-demand and online content: Tablet (1115), Subscription set-top box (1311), smart TV (518), Games console (759), non-subscription set-top box (730), Other internet connected player or box (130), Smartphone (1294), PC/Mac/laptop (1976)

Those with children are significantly more likely to think content should be regulated (49% of parents vs. 38% of non-parents) and women are significantly more likely than men to think so (47% of females vs. 34% of males). Men are significantly more likely than women to feel it should not be regulated at all (11% vs. 3%), as seen in the chart below.

Figure 5.7 Desired level of regulation: parents vs. non-parents, and gender



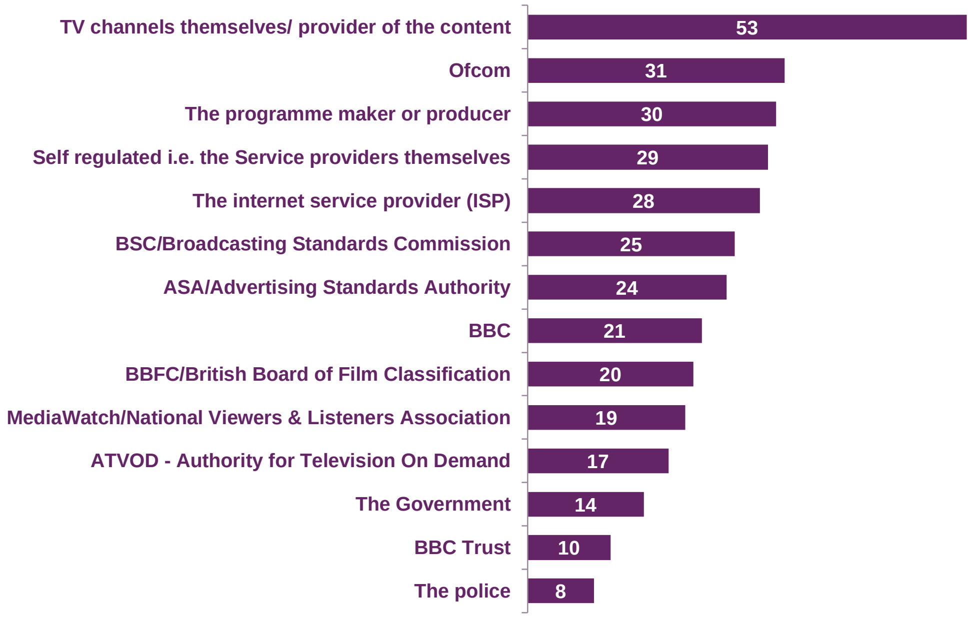
Source: On-demand and online tracker 2014 online Q17 Thinking about all the types of online and on-demand TV or video content you are aware of, please can you say how much regulation there should be on a scale of 1 to 5.
Base: All on-demand and online users online (2678), parents (942), non-parents (1736), male (1275), female (1403)

Teens are significantly more likely to think that on-demand and online content should be regulated than both adults overall and younger adults aged 16-24 (48% among teens vs. 41% among all adults, and 35% among 16-24 year olds) (see Annex A, 6.10).

5.6 Responsibility for regulating on-demand and online content

Responsibility for regulating on-demand and online services is most commonly thought to lie with content providers themselves; but of the third-party bodies, Ofcom and the ASA are the most mentioned. Younger age groups tend to be more likely to feel that responsibility is down to self-regulation by the content providers or creators (Figure 5.8).

Figure 5.8 Awareness of who is responsible for regulating: net mentions



Source: On-demand and online tracker 2014 online Q19 Who do you think is responsible for regulating each service?
Base: All on-demand and online users online (2678)

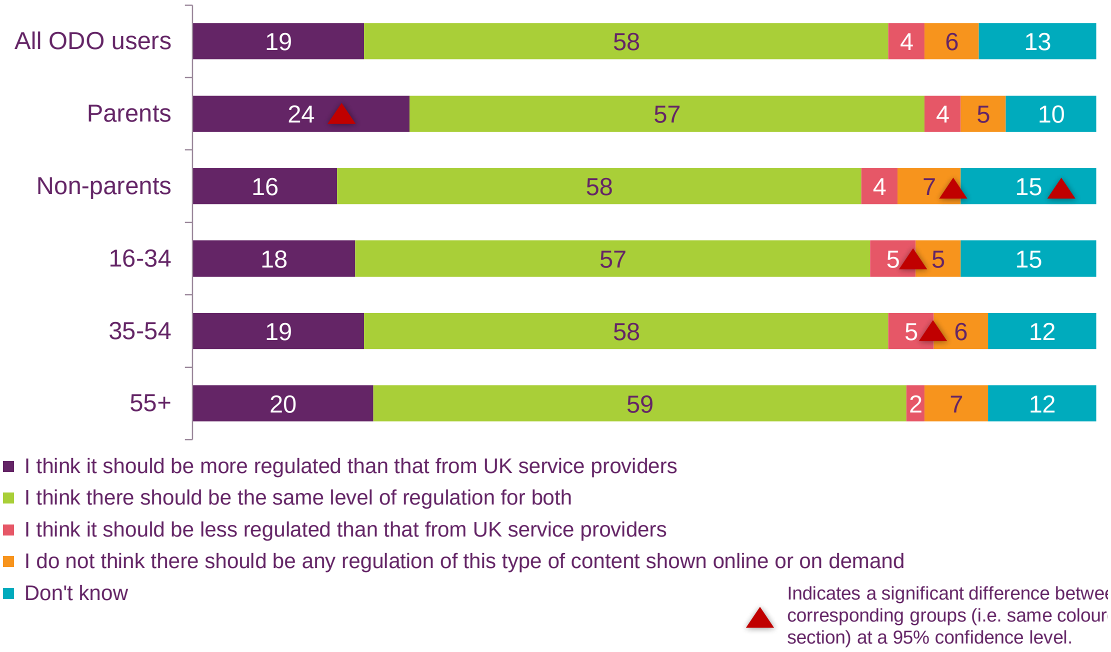
5.7 Regulation of non-UK service providers

The majority of on-demand and online users think there should be an equal level of regulation for on-demand and online content whether delivered by UK or non-UK providers (58%), while a fifth (19%) think there should be more for non-UK providers (see Figure 5.9).

Only one in twenty think there should be less regulation (4%) or no regulation (6%) of this type of content.

People with children are significantly more likely than those without to think there should be more regulation of non-UK content (24% of parents vs. 16% of non-parents).

Figure 5.9 Opinion on regulation of content from non-UK service providers, by parents vs. non-parents, and age

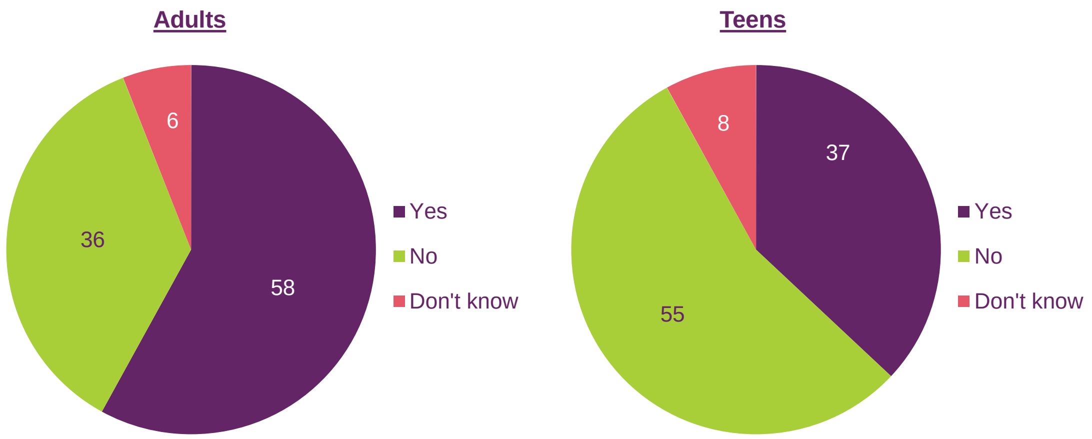


Source: On-demand and online tracker 2014 online Q24 Thinking about TV and video content that people can watch online in the UK which is delivered by foreign service providers (based outside of the UK), do you think it should be regulated more, the same amount or less than content delivered by UK service providers?.
Base: All on-demand and online users online (2678) parents (942), non-parents (1736), 16-34 (1039), 35-54 (974), 55+ (665)

5.8 Experience of age verification

Nearly three-fifths (58%) of adults say they recall having been asked for their age before accessing on-demand and online content, compared to just over a third (37%) of teens, as shown in Figure 5.10.

Figure 5.10 Experience of age verification

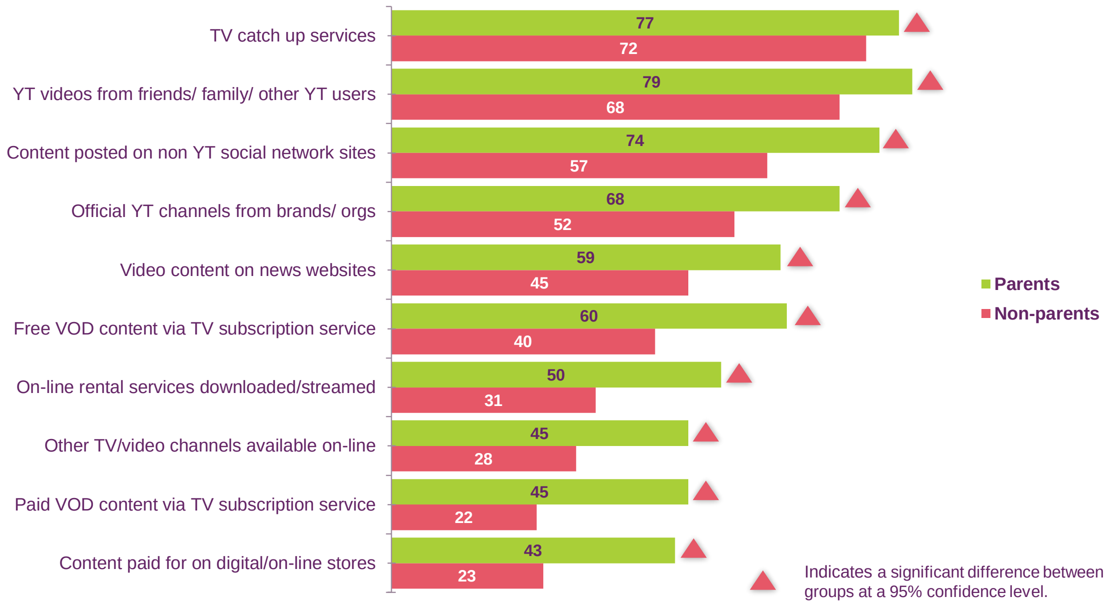


Source: On-demand and online tracker 2014 online Q22a When accessing online and on-demand TV or video content have you ever noticed being asked for your age before accessing content (e.g. by ticking a box to indicate you are over 16 or 18)?
Base: All on-demand and online users online (2678), All teen on-demand and online users online (500)

6. Annex A – Sub group analysis

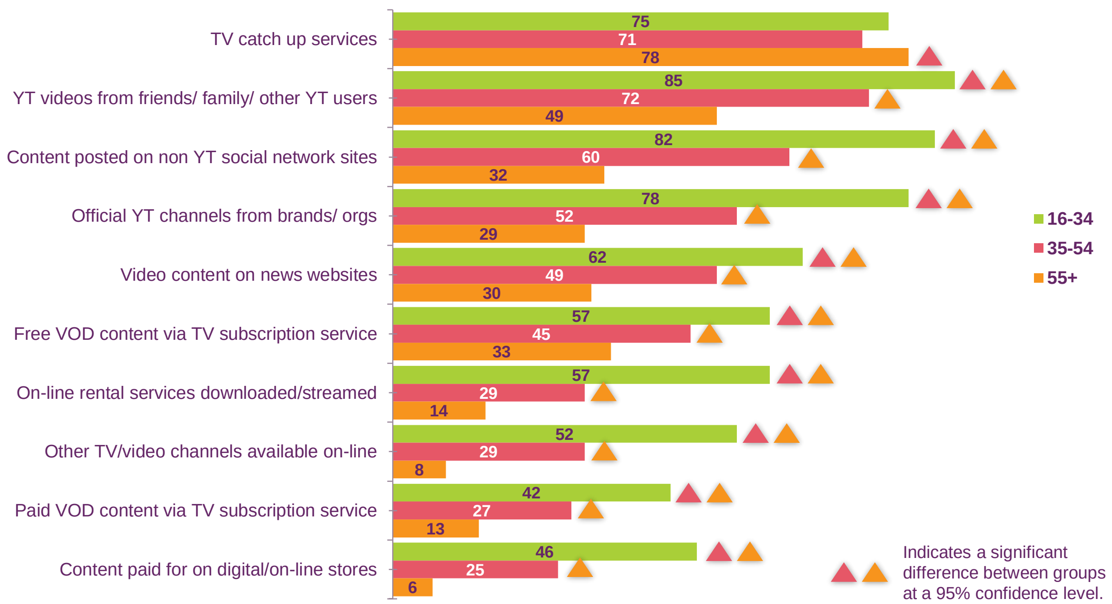
6.1 Frequency of on-demand and online services use: parental status and age

Figure 6.1 Ever viewed, by parents and non-parents



Source: On-demand and online tracker 2014 online Q9 So looking at the following services, please could you say how often you typically watch each of these?
Base: All on-demand and online users: parents (942), non-parents (1736)

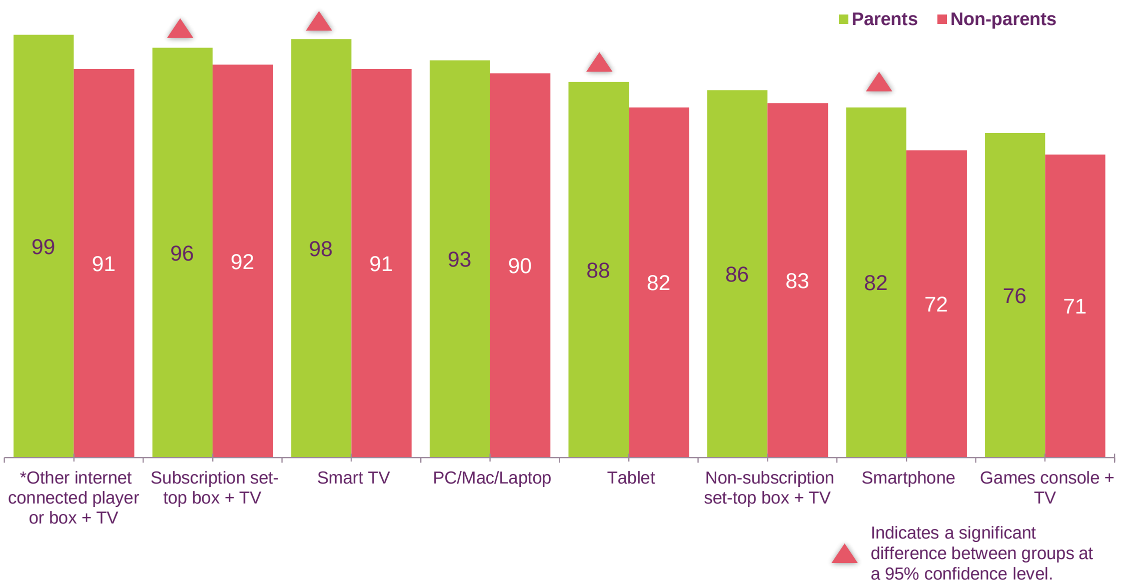
Figure 6.2 Ever viewed, by age



Source: On-demand and online tracker 2014 online Q9 So looking at the following services, please could you say how often you typically watch each of these?
Base: All on-demand and online users: 16-34 (1039), 35-54 (974), 55+ (665)

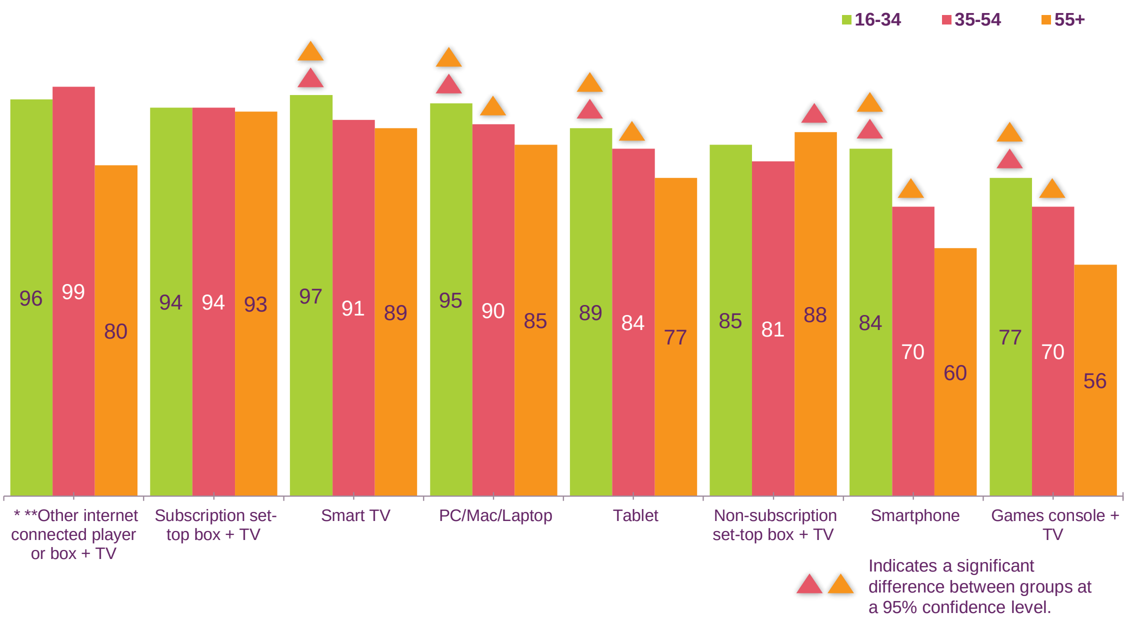
6.2 Frequency of use among device owners: parental status and age

Figure 6.3 Frequency of use among device owners: parents vs. non-parents



Source: On-demand and online tracker 2014 online Q10 How often do you personally use each of the following devices to view online or on-demand TV or video content at home or elsewhere?
Base: Users of each device – parents, non-parents: Other internet connected player or box + TV (65/74*), Subscription set top box + TV (567/818), smart TV (267/284), PC/Mac/Laptop (742/1422), Tablet (568/722), non-subscription set top box + TV (282/577), Smartphone (705/980), Games console + TV (501/519) *Effective base <100*

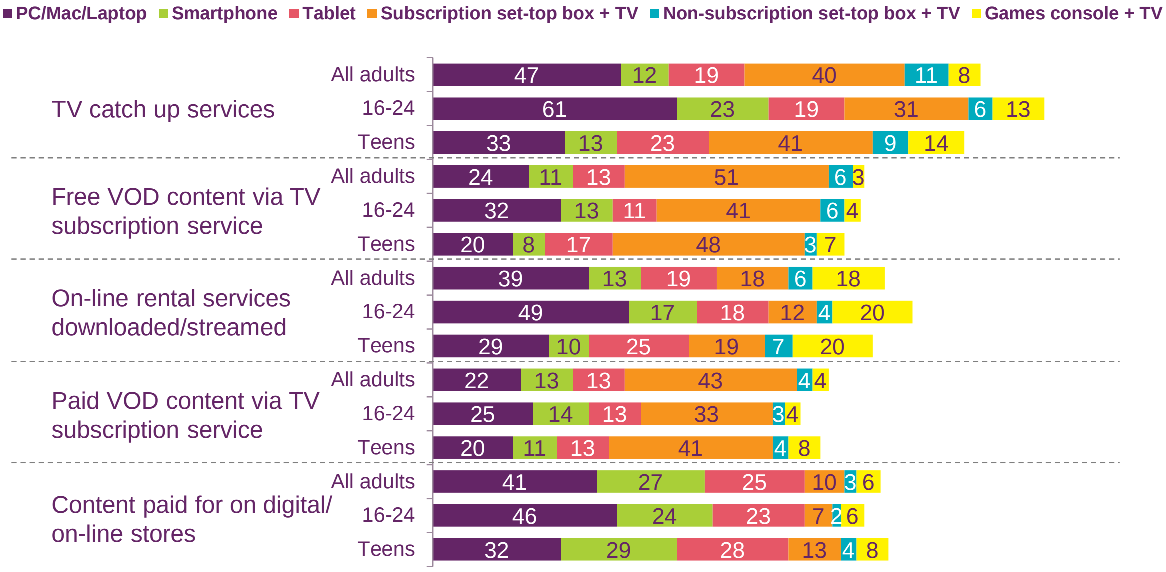
Figure 6.4 Frequency of use among device owners, by age



Source: On-demand and online tracker 2014 W1 online Q10 How often do you personally use each of the following devices to view online or on-demand TV or video content at home or elsewhere?
Base: Users of each device – 16-34, 35-54, 55+: Other internet connected player or box + TV (70/49**/20**), Subscription set top box + TV (548/515/322), smart TV (262/208/81*), PC/Mac/Laptop (874/783/507), Tablet (578/458/254), non-subscription set top box + TV (324/290/245), Smartphone (821/631/233), Games console + TV (566/376/78*) *Effective base <100, **Effective base <50*

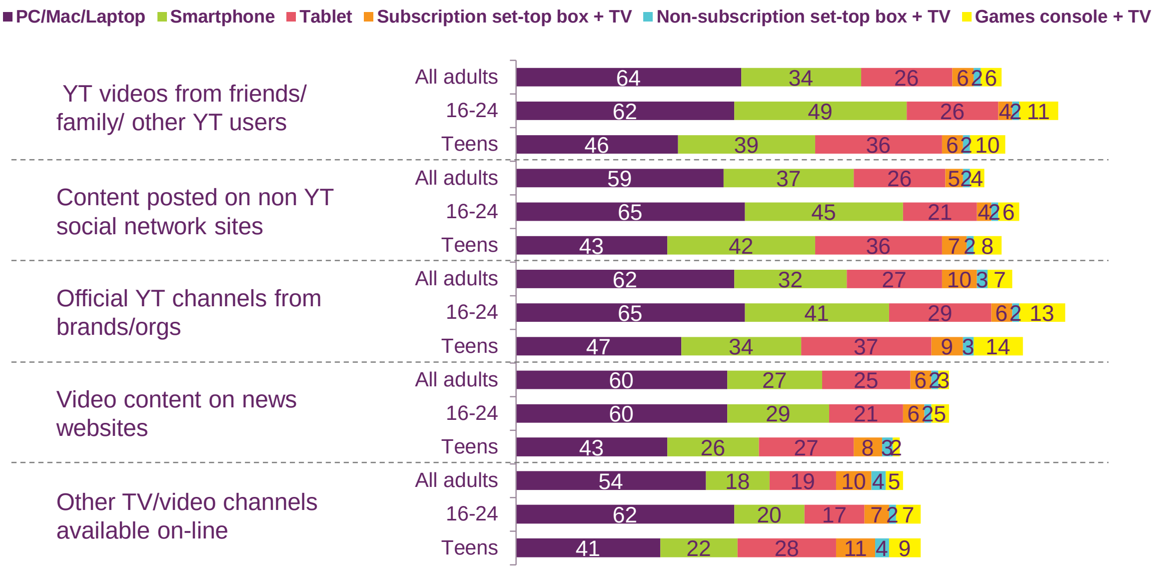
6.3 Devices used: all adults 16+, 16-24 year olds, teens comparison

Figure 6.5 Devices used at the service level, by age



Source: On-demand and online tracker 2014 online Q11 And which of these devices do you view each of these services on?
Base: Users of each service: TV catch up services (2128/375/418), Free VOD content via TV subscription service (1298/254/282), On-line rental services downloaded/streamed (1017/264/208), Paid VOD content via TV subscription service (837/187/183), Content paid for on digital/online stores (835/229/205)

Figure 6.6 Devices used for short-form services: users of each service, by age

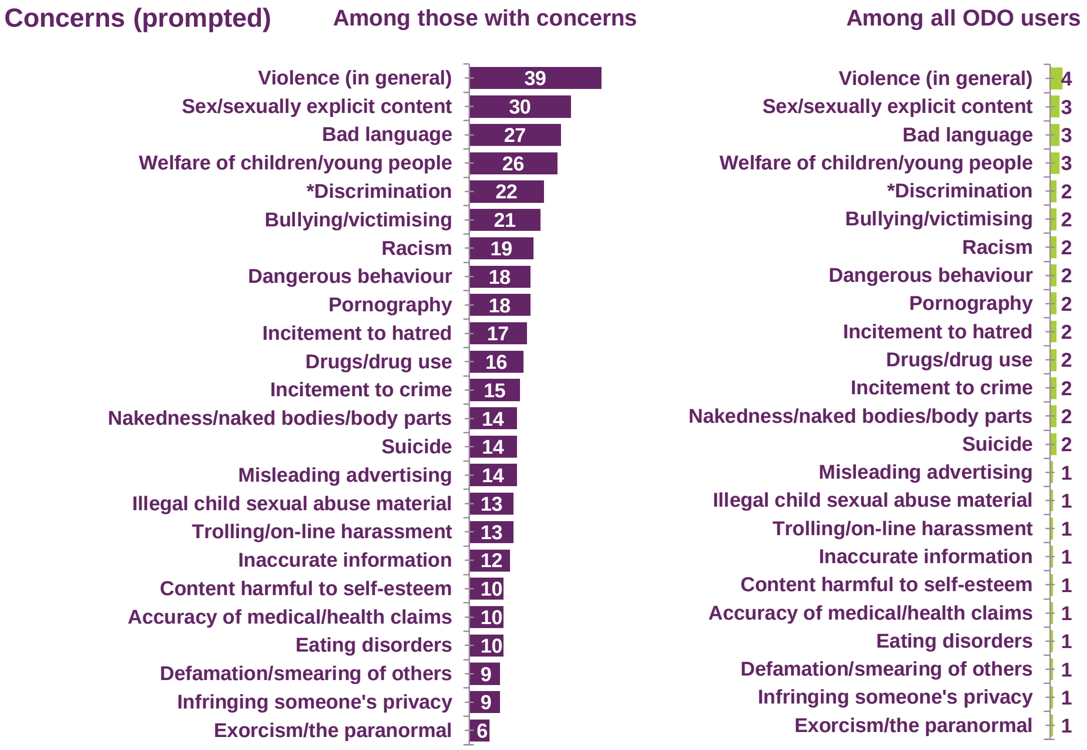


Base: Users of each service: YT videos from friends/ family/ other YT users (1952/382/437), Content posted on non YT social networking sites (1715/398/389), Official YT channels from brands/ orgs (1653/385/384), Video content on news websites (1435/289/176), Other TV/video channels available online (946/234)

bdrc continental

6.4 Type of content causing concern: parental status and gender

Figure 6.7 Types of concern, among those reporting concern



Source: On-demand and online tracker 2014 online Q13 What kind of thing caused you concern on the online or on-demand TV or video content you saw?
*Base: All on-demand and online users (2678), All with concerns (471) *Includes Discrimination (e.g. based on age, gender, disability, religious/non-religious beliefs) and Offence of religion*

Figure 6.8 Types of concern: parents vs. non-parents, and by gender

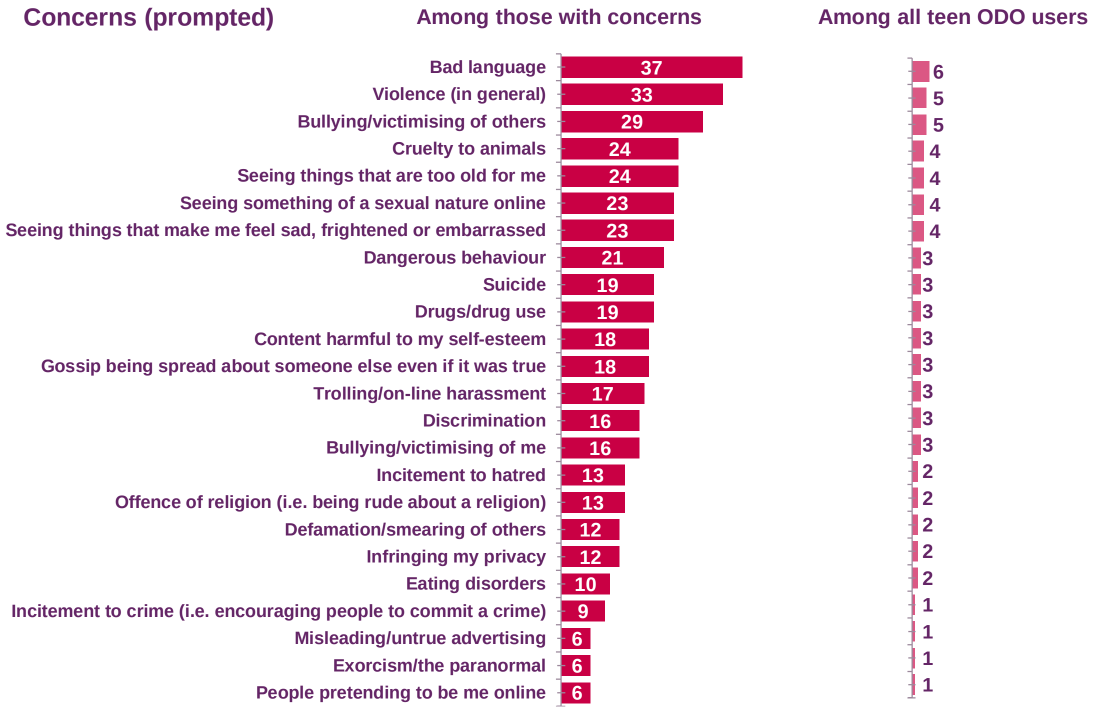
Top concerns	All with concerns	Male	Female	Parents	Non-parents
	%	%	%	%	%
Violence (in general)	39	37	40	39	39
Sex/sexually explicit content	30	30	30	33	25
Bad language	27	30	23	28	25
Welfare of children/young people	26	19	32	26	25
*Discrimination	22	22	22	21	24
Bullying/victimising	21	18	24	20	23
Racism	19	19	18	18	20
Dangerous behaviour	18	17	20	17	20
Pornography	18	19	18	22	14
Incitement to hatred	17	19	16	18	16
Drugs/drug use	16	17	15	19	12
Incitement to crime	15	16	15	17	13
Nakedness	14	15	14	16	12
Suicide	14	18	10	14	14
Misleading advertising	14	13	14	12	16
Illegal child sexual abuse material	13	12	14	15	10
Trolling/online harassment	13	10	15	13	13
Inaccurate information	12	13	11	12	12

Source: On-demand and online tracker 2014 online Q13 What kind of thing caused you concern on the online or on-demand TV or video content you saw?
Base: All with concerns (471), Male (236), Female (235), parents (256), non-parents (215)
**Includes Discrimination (e.g. based on age, gender, disability, religious/non-religious beliefs) and Offence of religion*

Indicates a significant difference between subsamples at a 95% confidence level.

6.5 Type of content causing concern among teens

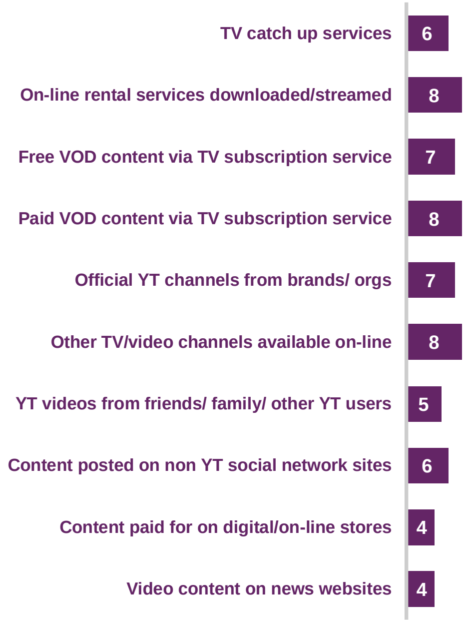
Figure 6.9 Types of concern (prompted): teens



Source: on-demand and online teens tracker 2014 online Q13 What kind of thing caused you concern on the online or on-demand TV or video content you saw?
Base: All teen on-demand and online users with concerns (85) All teen on-demand and online users (500) *Effective base <100*
*Base: All with concerns (471) *Includes Discrimination (e.g. based on age, gender, disability, religious/non-religious beliefs) and Offence of religion*

6.6 Incidence of seeing concerning content among users of each service

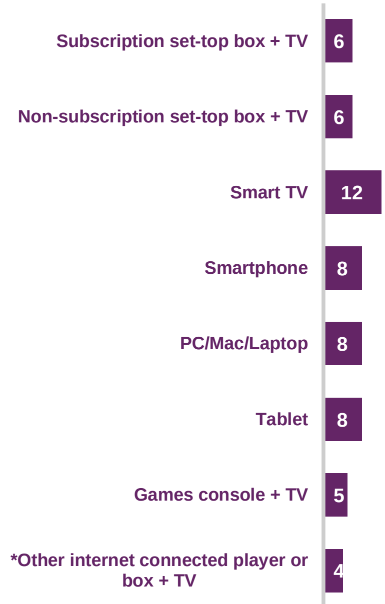
Figure 6.10 Seeing something of concern, by users of each service



Source: On-demand and online tracker 2014 online Q13A Thinking about each of the things that caused you concern on the online or on-demand TV or video content you have seen, please say which services you were watching this content on? Base: Users of each service: TV catch up services (2128), On-line rental services downloaded/streamed (1017), Free VOD content via TV subscription service (1298), Paid VOD content via TV subscription service (837), Official YT channels from brands/ orgs (1653), Other TV/video channels available online (946), YT videos from friends/ family/ other YT users (1952), Content posted on non YT social networking sites (1715). Content paid for on digital/online stores (835), Video content on news websites (1435)

6.7 Incidence of seeing concerning content among users of each device

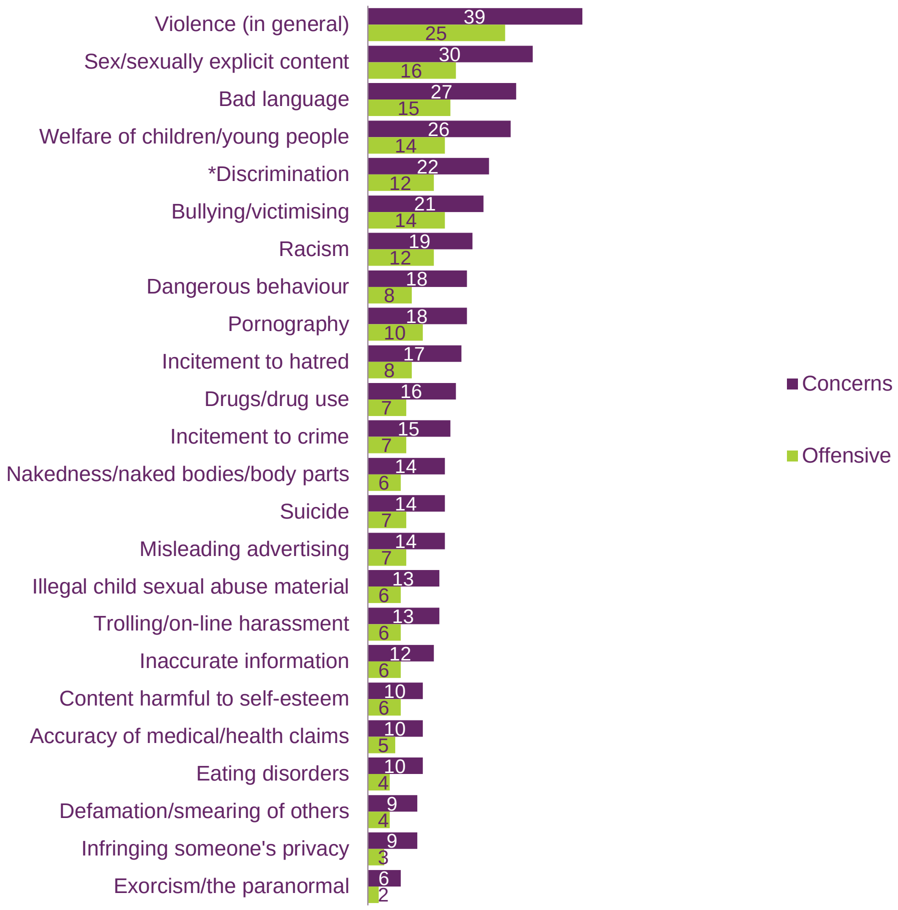
Figure 6.11 Seeing something of concern, by users of each device



Source: On-demand and online tracker 2014 online Q14 Thinking about each of the things you've seen on any online or on-demand TV or video content in the last 12 months, please can you say what device or devices you were watching at the time? Base: Users or each device: Subscription set top box (685), non-subscription set top box (371), smart TV (277), Smartphone (620), PC/Mac/Laptop (1033), Tablet (554), Games console (388), Other internet connected player or box (69) *Effective base <100*

6.8 Perceived offensiveness: all with concerns and by parental status and gender

Figure 6.12 Content that caused concern perceived to be offensive: all with concerns



Source: On-demand and online tracker 2014 online Q13 What kind of thing caused you concern on the online or on-demand TV or video content you saw?/ Q13B Thinking about the content that caused concern on the online or on-demand TV or video content, please can you indicate each one you also found to be offensive?
*Base: All with concerns (471) *Includes Discrimination (e.g. based on age, gender, disability, religious/non-religious beliefs) and Offence of religion*

Figure 6.13 Types of concern perceived to be offensive: parents vs. non-parents and gender

Top concerns perceived to be offensive	All with concerns	Male	Female	Parents	Non-parents
	%	%	%	%	%
Violence (in general)	25	21	28	25	24
Sex/sexually explicit content	16	13	20	18	14
Bad language	15	14	15	14	15
Welfare of children/young people	14	11	18	16	13
*Discrimination	12	10	13	9	16
Bullying/victimising	14	10	17	12	16
Racism	12	12	11	10	14
Dangerous behaviour	8	5	10	7	9
Pornography	10	9	10	13	6
Incitement to hatred	8	9	8	8	9
Drugs/drug use	7	7	7	8	6
Incitement to crime	7	6	7	7	6
Nakedness	6	5	8	7	6
Suicide	7	8	6	8	5
Misleading advertising	7	5	9	6	8
Illegal child sexual abuse material	6	5	8	6	7
Trolling/online harassment	6	4	9	6	7
Inaccurate information	6	5	6	6	6

Source: On-demand and online tracker 2014 online Q13B Thinking about the content that caused concern on the online or on-demand TV or video content, please can you indicate each one you also found to be offensive?
Base: All with concerns (471), Male (236), Female (235), parents (256), non-parents (215)
**Includes Discrimination (e.g. based on age, gender, disability, religious/non-religious beliefs) and Offence of religion*

Indicates a significant difference between subsamples at a 95% confidence level.

6.9 Perceived harm to children of concerning content, by parental status and gender

Figure 6.14 Types of concern perceived harmful to children: parents and gender

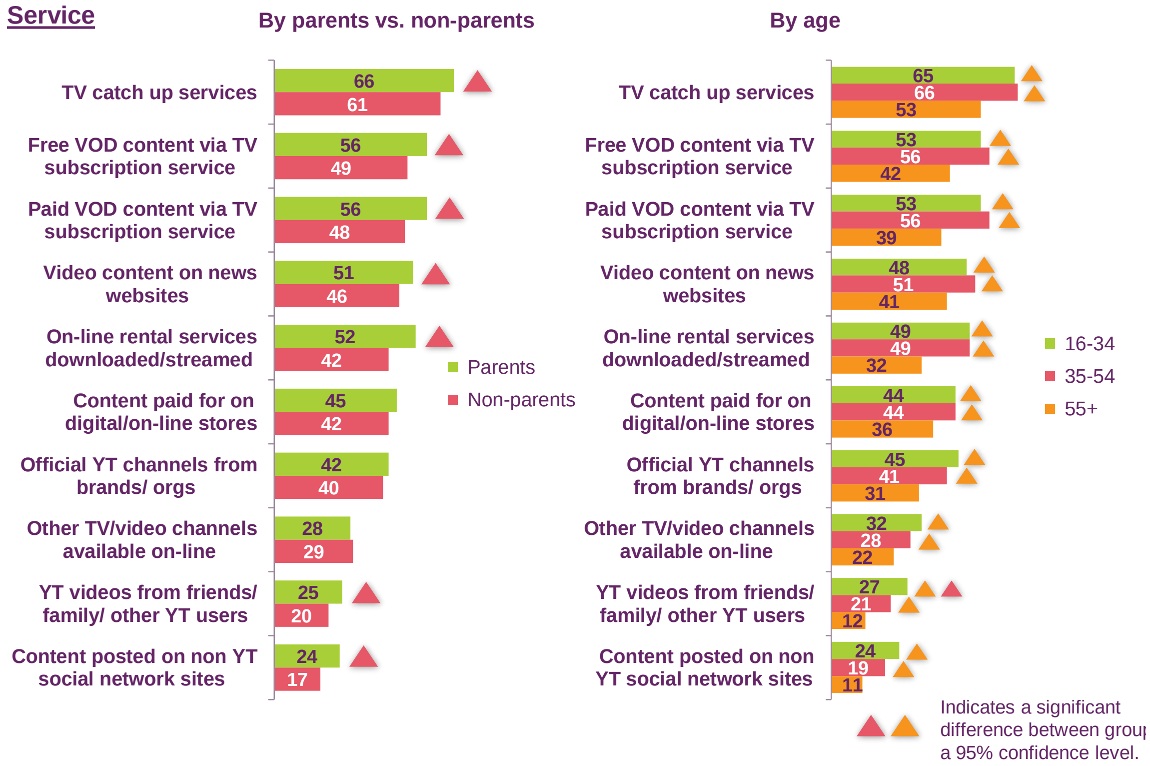
Top concerns perceived to be harmful to children	All with concerns	Male	Female	Parents	Non-parents
	%	%	%	%	%
Violence (in general)	31	27	35	31	32
Sex/sexually explicit content	22	21	22	24	19
Bad language	19	19	19	18	20
Welfare of children/young people	19	14	24	20	17
*Discrimination	15	15	15	13	19
Bullying/victimising	18	13	22	16	20
Racism	13	14	12	12	15
Dangerous behaviour	13	12	14	12	15
Pornography	14	16	12	15	13
Incitement to hatred	12	13	10	11	12
Drugs/drug use	10	10	9	11	9
Incitement to crime	9	10	9	11	7
Nakedness	11	10	11	11	10
Suicide	9	10	7	10	8
Misleading advertising	7	5	8	7	7
Illegal child sexual abuse material	9	8	10	10	8
Trolling/online harassment	8	5	11	7	9
Inaccurate information	7	7	7	7	7

Source: On-demand and online tracker 2014 online Q13C Thinking about the things you have seen that have concerned you, which of these do you think could be harmful to children?
Base: All with concerns (471), Male (236), Female (235), parents (256), non-parents (215)
**Includes Discrimination (e.g. based on age, gender, disability, religious/non-religious beliefs) and Offence of religion*

Indicates a significant difference between subsamples at a 95% confidence level.

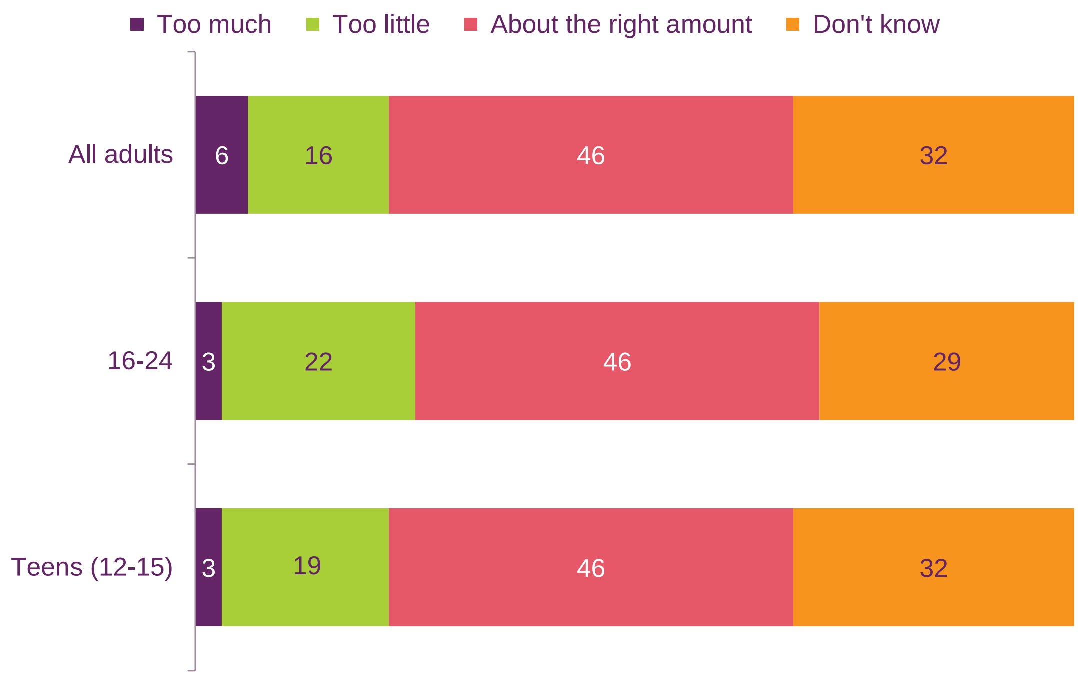
6.10 Understanding of, and attitudes towards, regulation

Figure 6.15 Proportion believing each service is regulated: parents vs. non parents and age



Source: On-demand and online tracker 2014 online Q18 As far as you know, are each of the following services regulated? Base: All aware of each service – parents/non-parents/16-34/35-54/55+: TV catch up services (916/1689/999/949/657), Free VOD content via TV subscription service (875/1540/956/876/583), Paid VOD content via TV subscription service (872/1547/939/890/590), Video content on news websites (850/1531/954/877/550), On-line rental services downloaded/streamed (896/1617/989/915/609), Content paid for on digital/online stores (848/1485/946/852/535), Official YT channels from brands/ orgs (898/1567/1006/899/560), Other TV/video channels available online (751/1288/885/730/424), YT videos from friends/family/other YT users (905/1627/1008/928/596), Content posted on non YT social networking sites (903/1587/1006/910/574)

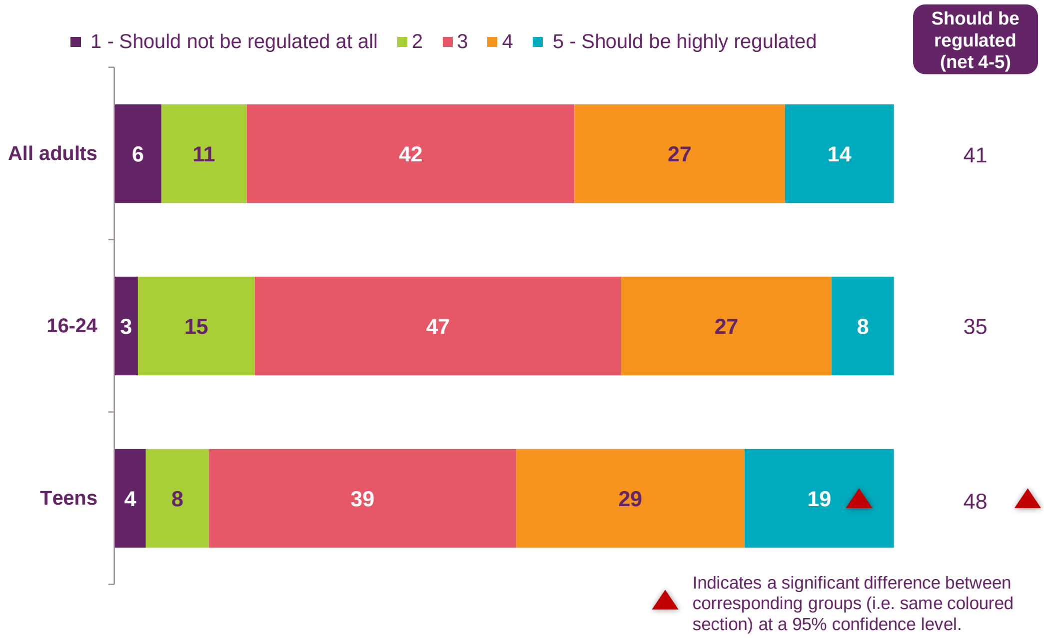
Figure 6.16 Opinion on current levels of regulation, by age



bdrc continental

Source: On-demand and online tracker 2014 online Q20 Do you think the amount of regulation for each of the following is too much, too little or about the right amount?
Base: All on-demand and online users online (2678), All 16-24 on-demand and online users (446), All teen On-demand and online users online (500)

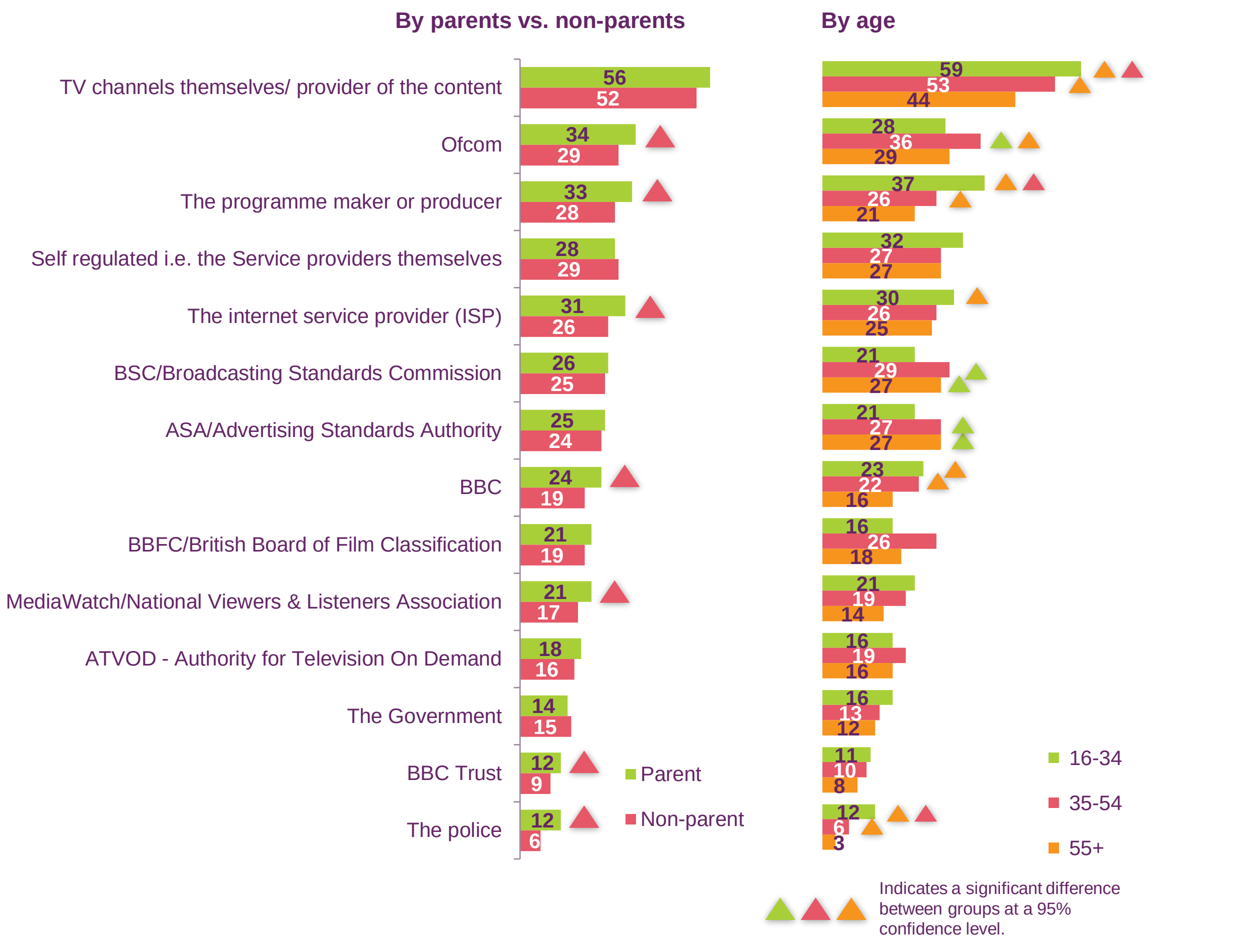
Figure 6.17 Desired level of regulation: all adults 16+, 16-24 year olds, teens



Source: On-demand and online tracker 2014 online Q17 Thinking about all the types of online and on-demand TV or video content you are aware of, please can you say how much regulation ***there should be*** *on a scale of 1 to 5? / Q23a What level of regulation do you think there should be when people watch these services on each device on a scale of 1 to 5?*
Base: All on-demand and online users online (2678), All 16-24 on-demand and online users (446), All teen on-demand and online users (500).

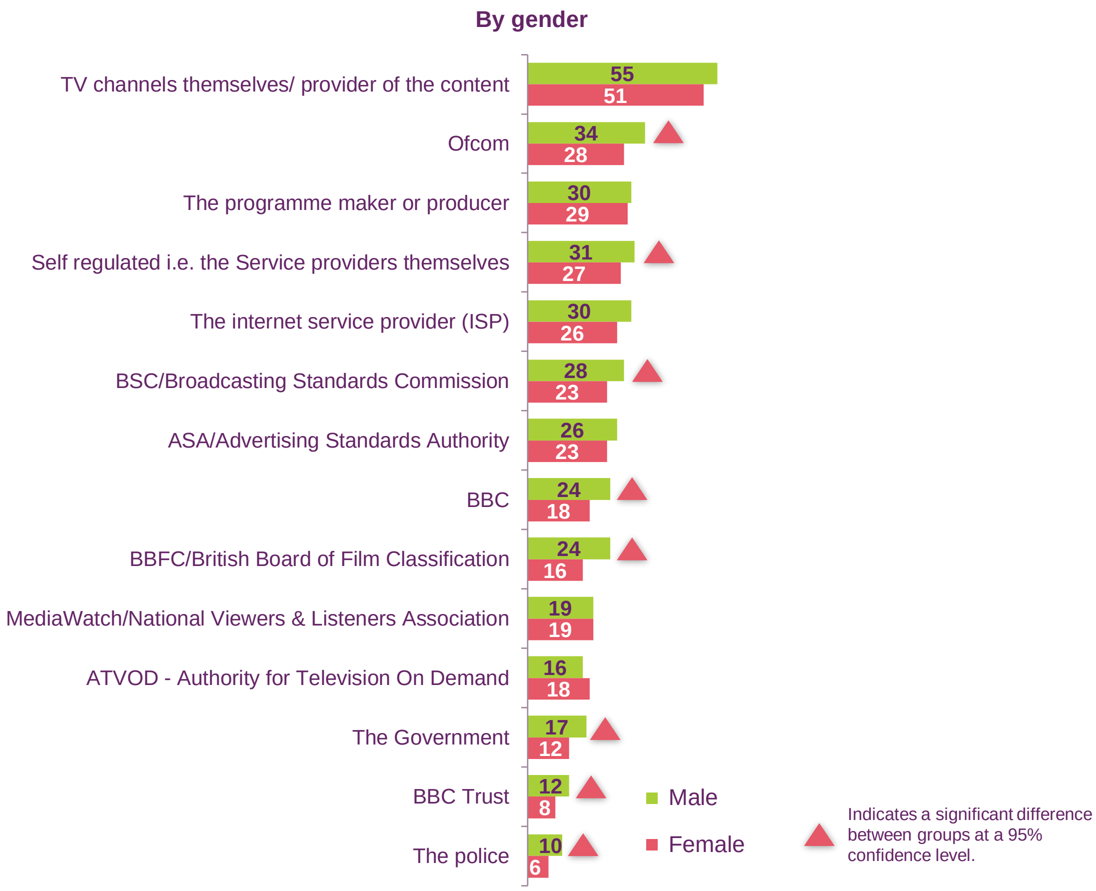
6.11 Responsibility for regulating online content: parental status, age and gender

Figure 6.18 Awareness of who is responsible for regulating: parents and age



Source: On-demand and online tracker 2014 online Q19 Who do you think is responsible for regulating each service?
Base: All on-demand and online users online: parents (942), non-parents (1736), 16-34 (1039), 35-54 (974), 55+ (665)

Figure 6.19 Awareness of who is responsible for regulating: gender



Source: On-demand and online tracker 2014 online Q19 Who do you think is responsible for regulating each service?
Base: All on-demand and online users: Male (1275), Female (1403)

7. Annex B – Pilot and weighting

A multi-stage pilot was undertaken in 2013 to develop a methodology, questionnaire and sampling and weighting approach that would meet Ofcom's objectives, culminating in a pilot wave of 2,102 online interviews demographically representative of UK adults aged 16+ using on-demand and online services.

- Respondents were screened to establish whether they were users of any of the relevant services, and broad demographic targets were set during fieldwork on gender, age, socio-economic group, nation and working status to match the profile of offline users of these services.
    - An establishment survey was conducted to accompany the main pilot survey. As online survey respondents tend to be slightly atypical (e.g. heavier users of online and other tech devices and services), a selection of questions from the online survey was placed on a face-to-face omnibus among a UK representative sample of 2,077 adults (aged 16+) to establish the penetration and profile of users of on-demand and online services among UK adults (aged 16+). This was to provide a profile in order to weight the online results to enable them to be representative of the UK population. The omnibus interviews were carried out face-to-face using a Computer Assisted Personal Interviewing (CAPI) technique from 3-7 January 2014.
- Subsequently a weighting process was carried out to map the online survey data to the general (offline) population of on-demand and online users, using a discriminant analysis to determine additional rim weights to apply to the online sample to match the profile of the offline sample for influential variables.
- Certain influential low-incidence groups were identified and boosted to reduce the amount of weighting required.

This weighting process to map the online survey data to the general (offline) population of on-demand and online users, was carried out again on the 2014 data.

Initially the offline and online survey data was merged and conventional demographic weights applied. The discriminant analysis was run again using data from the September 2014 (offline) establishment survey and through this process an additional influential variable, 'level of concern', was identified and incorporated into the weighting regime. The additional rim weights were then applied to the online sample to match the profile of the offline sample. These were:

- Frequency (at least once a month; ever watch) of using TV catch-up services (e.g. BBC iPlayer, ITV Player, 4oD, Demand 5, Now TV)
- Frequency (at least weekly; ever watch) of using any 'niche' service (official YouTube channels; other TV or video channels; video content on a news website)
- Proportion seeing something of concern

At the pilot stage the weighting process substantially reduced the *effective* sample size of the resulting data (i.e. an estimate of the statistical robustness of the sample accounting for the effect of weighting). In order to increase the weighting efficiency for the main survey to provide a larger effective sample size it was decided to boost certain influential low-incidence groups to achieve the required effective sample most efficiently and a series of simulations was run using the pilot data to determine the appropriate definition and size.

The boost groups targeted were those never using niche services (Official YouTube channels; other TV or Video channels; video content on news websites); and those never watching catch-up TV.

The weighting scheme provided a way of mapping online survey data to the general (offline) population with a good degree of accuracy. The results were not perfect however they provided a reliable approximation. After weighting, 75% of all 327 measures common to the F2F and online surveys were within five percentage points of the offline data.

The final weighting efficiency was 77% which means the weighting was not too extreme and the achieved statistical base was robust.

8. Annex C – Online demographic weighting matrix

	%
Male	50
Female	50
16-24	19
25-34	25
35-44	19
45-54	16
55-64	13
65+	9
ABC1	57
C2DE	43
Parent	37
Non-parent	63
Working	61
Not working	39
Single	13
2+ HH	87

9. Annex D – Adult questionnaire

Q1

Ofcom on-demand and online tracker 2014 questionnaire – FINAL

21199____(8-12)

SURVEY DETAILS Executive name: Tim Barber, Jeremiah Fryer

FIELD DATES: June & October 2014

Client: Ofcom

INTRODUCTION:

Thank you for agreeing to take part in this survey about your viewing habits.

The survey should take about 12-15 minutes.

You'll be able to stop whenever you like and come back and complete it in more than one go, however, we'd ask you to complete the survey by 21st October

Q2 STANDARD REGION.

In which of the following areas do you live?

(13)

Scotland..1
North East......................................2
North West......................................3
Yorkshire.......................................4
East Midlands...................................5
West Midlands...................................6
Wales...7
East..8
South West......................................9

(14)

South East......................................0
London..1
Northern Ireland................................2

Q3 Are you...?

(15)

Male..1
Female..2

Q4 How old are you?

Please type in number: ____

SCRIPTER: PLEASE CODE TO THE FOLLOWING BANDS

(16)

16-17....................1
18-24....................2
25-34....................3
35-44....................4
45-54....................5
55-64....................6
65-74....................7
75+....................8

Q4a (29) How many people are there in your household, including yourself and any children? Please include anyone living with you as part of a 'family unit'.

Please type in the number.
SINGLE CODE

______________________________ (20-21)

Q4b (30) DO NOT ASK

SCRIPTER: CODE SIZE OF HOUSEHOLD FROM Q4b. SINGLE CODE

(22)

Single (i.e. 1 person) 1
2 people....................2
Medium (3-4 people) 3
Large (5+ people) 4

Q4c (31) ASK ALL

Are you the parent or guardian of any children under 18?

Please select one.
SINGLE CODE

Yes....................1
No 2

Q4d (32) ASK IF PARENT OR GUARDIAN OF ANY CHILDREN UNDER 18

How old is/are your child/ren?

Please select all that apply.
MULTICODE

0-2....................1
3-4....................2
5-7....................3
8-10....................4
11-16....................5
17 6

Q5 ASK ALL

Are you…?

Please select one.

SINGLE CODE

(17)

Working full time (30+ hours per week)..1
Working part-time (8-29 hours per week)..2
Not working (i.e. under 8hrs/week) retired 3
Not working (i.e. under 8hrs/week) unemployed registered/not registered but looking for work) 4
Not working (i.e. under 8hrs/week) student..5
Not working (i.e. under 8hrs/week) housewife/disabled/other..6
Don't Know 7

Q6
ASK ALL

And which of the following best describes the main income earner in your household? If they're retired, please think back to their last job before retirement.

Please note:
1. If you live in a household with others, but have separate finances, do not include them in this question. Only consider those who have shared incomes/ outgoings.
2. If the main income earner has been unemployed for less than 6 months, don't answer 'unemployed', but think back to the last job before that.
3. If they're retired and receiving a pension from employment as well as a state pension, please think back to the last job before retirement.

Please select one.
SCRIPTER: DO NOT DISPLAY GRADE IN SURVEY

(18)

Very senior management; top level civil servant or professional (e.g. surgeon; partner in a law firm; regional bank manager; board director of medium/ large firm) [A].......................................1
Senior or middle management in large organisation; owner of small business; principal officer in civil service/ local government [B] 2
Junior management or professional; or administrative (e.g. most office workers; accounts clerk; secretary; police sergeant) [C1]...3
Skilled manual worker (e.g.; plumber; electrician) [C2]..4
Manual worker (e.g. lorry driver; labourer; hotel porter) [D] 5
Casual worker without regular income; or unemployed for 6 months or longer [E] 6
Retired and receiving a state pension [E]...7
Housewife/ house husband/ looking after family [E]..8
Student [C1]..9

DEVICES - ASK ALL

Q7: Have you watched anything online or on-demand such as TV programs, video, clips or films in the last 12 months?
THE FOLLOWING TO APPEAR AS LIGHT GREY, ITALICISED TEXT

By online or on-demand we mean viewing TV or video content on a TV that offers online/ on-demand services or through a device connected to the Internet (e.g. PC/laptop, tablet, smartphone).

By TV or video content we mean things such as TV programmes, films, video clips, video podcasts or anything else you have watched online or on-demand.
SINGLE CODE
Yes 1
No 2
Don't Know 3

ASK ALL

Q7T Have you watched YouTube in the past 12 months?

SINGLE CODE

Yes 1

No 2

Don't Know 3

ASK ALL

Q8 Which of these do you ever use?

Please select all that apply.

MULTICODE

IF NONE (CODE 11) FOR EVER USE, CLOSE.

	Q8
Set-top box for on-demand content **with a subscription service** (e.g. Virgin Media/ Sky) – connected to a TV	1
Set-top box without a subscription service (e.g. Freeview/ Freesat/ YouView/ Now TV) – connected to a TV	2
Smart TV (a new type of TV connected to the internet that can display online content directly onto your TV screen without the need for a computer; set-top box or games console). Sometimes referred to as a "Connected TV" or "Hybrid TV"	3
Smartphone (i.e. a phone on which you can easily access emails, download files and applications, and generally surf the internet, e.g. BlackBerry, iPhone and Android phones such as the Samsung Galaxy)	4
PC/Mac/laptop	5
Tablet computer (e.g. iPad/ Kindle Fire HD)	6
Games console (e.g. PlayStation/Xbox/ Wii/PS3) – connected to a TV	7
Other internet-connected **player or box that you use for viewing** TV/ video content (e.g. Roku/ Apple TV/Google TV/Google Chromecast) – connected to a TV	8
None of the above	9
Don't know	10

Q9 ASK ALL

So looking at the following list of services, please could you say how often you typically watch each of these?
If you never watch a service, please say whether or not you were aware of it before this survey.

Please select one answer for each. SINGLE CODE

RESPONDENT MUST CODE 'EVER' (CODES 1-5) FOR AT LEAST ONE SERVICE TO CONTINUE, OTHERWISE CLOSE.

ROTATE ORDER

	Every day	**Several times a week**	**At least once a week**	**At least once a month**	**Less than once a month**	**Aware of the service but not viewed in the last 12 months/ have never viewed**	**Not aware of this service**
TV catch up services (e.g. BBC iPlayer, ITV Player, 4oD, Demand 5, Now TV)	1	2	3	4	5	6	7
On-line video rental services downloaded or streamed (e.g. Blinkbox, Amazon Prime Instant Video, Netflix)	1	2	3	4	5	6	7
Free Video on demand content available through your subscription service provider (e.g. Virgin Media/Sky Go)	1	2	3	4	5	6	7
Paid Video on demand content available through your subscription service provider (e.g. film rental on a pay per view basis on Virgin Media, Sky Go, etc.)	1	2	3	4	5	6	7
Official YouTube channels from brands/ organisations you are familiar with (e.g. 4oD, BBC Worldwide, Jamie Oliver's Food Tube, Top Gear etc.)	1	2	3	4	5	6	7
Other TV or video channels available online (e.g.southparkstudios.co.uk, Vevo.com)	1	2	3	4	5	6	7
YouTube videos uploaded by friends, family or other YouTube users (i.e. non-professional)	1	2	3	4	5	6	7
Video content posted on social networking sites other than YouTube (e.g. Facebook, Twitter, blogs, Vimeo etc.)	1	2	3	4	5	6	7
Video content you have paid for on digital or online stores (e.g. iTunes Store, Google Play etc.)	1	2	3	4	5	6	7
Video content on news websites (e.g. The Sun/ The Guardian/ The Huffington Post/ www.bloomberg.tv etc.)	1	2	3	4	5	6	7

Q10 ASK ALL VIEWING AT LEAST ONE SERVICE ‘EVER’ (CODES 1-5) AT Q9
FILTER- ONLY SHOW DEVICES SELECTED AT Q8

How often do you personally use each of the following **devices** to view **online or on-demand TV or video content** at home or elsewhere?

Please select one answer for each. SINGLE CODE
RESPONDENT MUST CODE ‘EVER’ (CODES 1-5) FOR AT LEAST ONE DEVICE TO CONTINUE, OTHERWISE CLOSE. ROTATE ORDER

	Every day	**Several times a week**	**At least once a week**	**At least once a month**	**Less than once a month**	**Never**	**Don't know**
Set-top box for on-demand content with a subscription service (e.g. Virgin Media/Sky) – connected to a TV	1	2	3	4	5	6	7
Set-top box without a subscription service (e.g. Freeview/Freesat/YouView/ Now TV) – connected to a TV	1	2	3	4	5	6	7
Smart TV (a new type of TV connected to the internet that can display online content directly onto your TV screen without the need for a computer; set-top box or games console). Sometimes referred to as a "Connected TV" or "Hybrid TV"	1	2	3	4	5	6	7
Smartphone (i.e. a phone on which you can easily access emails, download files and applications, and generally surf the internet, e.g. BlackBerry, iPhone and Android phones such as the Samsung Galaxy)	1	2	3	4	5	6	7
PC/Mac/laptop	1	2	3	4	5	6	7
Tablet computer (e.g. iPad/Kindle Fire HD)	1	2	3	4	5	6	7
Games console (e.g. PlayStation/Xbox/Wii/ PS3) – connected to a TV	1	2	3	4	5	6	7
Other internet connected player or box that you use for viewing TV/video content (e.g. Roku/Apple TV/Google TV/Google Chromecast)) – connected to a TV	1	2	3	4	5	6	7

Q11 ASK ALL VIEWING AT LEAST ONE SERVICE AT LEAST ‘EVER’ (CODES 1-5) AT Q9

And which of these devices do you view each of these services on? You can select more than one device for each service

Please select all that apply for each. MULTICODE

SCRIPTER: ONLY SHOW DEVICES ACROSS THE TOP USED ‘EVER’ (CODES 1-5) AT Q10 AND SERVICES DOWN THE SIDE USED ‘EVER’ (CODES 1-5) AT Q9
ALLOW MULTICODE FOR RESPONSES IN EACH ROW APART FROM NONE OF THESE

	INSERT LIST FROM 12	**None of these (SINGLE CODE)**
INSERT LIST FROM Q9	1	2

Now we’d like to ask you some questions about your views on the online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> that you have seen on the services we have been discussing.

Q12 ALL VIEWING AT LEAST ONE SERVICE AT LEAST ‘EVER’ (CODES 1-5) AT Q9

Thinking about all the **online or on-demand TV or video content** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> you watch nowadays, has anything that you have seen on any online or on-demand service **caused you any concern**?

When answering, please think about things that have concerned you **personally**, rather than what you think might cause concern to others.

*THE FOLLOWING NOTE TO BE INCLUDED FOR EVERY QUESTION WITH HOVER TEXT (Hover over **green text** for a description)*

Yes....................1
No....................2
Don’t know....................3

Q12A ASK ALL WHO HAVE SEEN SOMETHING OF CONCERN ON ANY ON-LINE OR ON-DEMAND SERVICE (CODE 1) AT Q12

And what kind of things caused you concern **on the online or on-demand TV or video content** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> you saw on any online or on-demand service?

Please type in.

Q13 ASK ALL WHO HAVE SEEN SOMETHING OF CONCERN ON ANY ON-LINE OR ON-DEMAND SERVICE (CODE 1) AT Q12

You mentioned that you had seen something of concern on any online or on-demand service. What kind of thing caused you concern on the **online or on-demand TV or video content** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on demand >> you saw?

Please include anything you typed in at the previous question as well as anything you have not previously mentioned.

Please select as many as apply. MULTICODE

REVERSE ORDER

Accuracy of medical/health claims	1
Bad language	2
Bullying/victimising	3
Content harmful to self-esteem (e.g. self-abuse)	4
Dangerous behaviour	5
Defamation/smearing of others	6
Discrimination (e.g. based on age, gender, disability, religious/non-religious beliefs)	7
Drugs/drug use	8
Eating disorders	9
Exorcism/the paranormal	10
Illegal child sexual abuse material	11
Inaccurate information	12
Incitement to crime	13
Incitement to hatred	14
Infringing someone's privacy	15
Misleading advertising	16
Nakedness/naked bodies/body parts	17
Offence of religion	18
Pornography	19
Racism	20
Sex/sexually explicit content	21
Suicide	22
Trolling/online harassment (please think about video content itself rather than any comments made on it)	23
Violence (in general)	24
Welfare of children or young people	25
Other (please type in)	26

Q13A ASK ALL WHO HAVE SEEN SOMETHING OF CONCERN ON ANY ON-LINE OR ON-DEMAND SERVICE (CODE 1) AT Q12
Thinking about each of the things that caused you concern on the **online or on-demand TV or video content** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> you have seen, please say which services you were watching this content on?

PLEASE SELECT AS MANY SERVICES AS APPLY FOR EACH AREA OF CONCERN

	INSERT SERVICES VIEWED FROM Q9 CODES 1-5
INSERT CONCERNS SELECTED AT Q15	
Don't know	

Q13B ASK SELECTED CONCERNS AT Q13
Now still thinking about the content that caused concern on the **online or on-demand TV or video content** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> you have seen, please can you indicate each one you also found to be offensive?

Please select as many as apply. MULTICODE

INSERT CONCERNS SELECTED AT Q13 1
I did not find any of these offensive 2

Q13C ASK SELECTED CONCERNS AT Q13
Thinking about the things you have seen that have concerned you, which of these do you think could be harmful to children?

Please select as many as apply. MULTICODE
INSERT CONCERNS SELECTED AT Q13 1
None of them 2

Q14 ASK ALL WHO HAVE SEEN SOMETHING CAUSING CONCERN ON ANY SERVICE (CODE 1 AT Q12)

Thinking about each of the things you've seen on any **online or on-demand TV or video service** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> in the last 12 months that caused you concern, please can you say what device or devices you were watching at the time?

Please select as many as apply for each. SINGLE CODE

(28)

	INSERT LIST OF DEVICES USED FROM Q12 CODES 1-5
INSERT CONCERNS SELECTED AT Q13	1
Don't recall where I viewed (SINGLE CODE)	

Q15 ASK ALL WHO HAVE SEEN SOMETHING THAT CAUSED CONCERN ON ANY SERVICE IN THE LAST 12 MONTHS (CODE 1 AT Q12)

And how have you generally reacted when you have seen something that caused you concern? In other words, what have you done?

Please select the answers that best apply. MULTICODE

(15)

Stopped viewing **the content** that was causing concern at the time, but have used the service since 1
Stopped using **the service** causing concern, **and** have stopped using **the service thereafter** 3
Complained to the provider of content (e.g. iPlayer, LoveFilm, YouTube, etc.) (e.g. by emailing or writing to them, or by using a report button or flagging tool available on the service) 4
Complained/reported to a third party body (e.g. a regulator e.g. Ofcom/BBC Trust/ATVOD) 5
Nothing/continued viewing content..6
Discussed it with other people..7
Other (please type in)..8
Don't know/don't remember..9

Q16 ASK ALL COMPLAINING TO A THIRD PARTY (CODE 5) AT Q15

You said you complained to a third party body about the content that caused you concern. Who was this?

ASA/Advertising Standards Authority..1
ATVOD – Authority for Television On-demand 2
BBFC/British Board of Film Classification 3
BSC/Broadcasting Standards Commission..4
MediaWatch/National Viewers and Listeners Association 5
Ofcom/Office of Communications..6
The Government (inc Northern Ireland Assembly/Scottish Executive/Welsh Executive) 7
BBC Trust..8
Other (please type in)..8
Don’t know..9

We'd now like to ask you some questions about the regulation of the online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> we have been discussing. By regulation we mean rules and regulations put in place by the Government/ an independent regulatory body about what can and cannot be shown.

REGULATION OF SERVICES

Q17 ASK ALL

Thinking about all the types of online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> you are aware of, please can you say how much regulation **there should be** on a scale of 1 to 5, where 5 is this content should be highly regulated and 1 that this content should not be regulated at all.

Please select one answer. SINGLE CODE

1 – This type of content should not be regulated at all	2	3	4	5 – This type of content should be highly regulated
1	2	3	4	5

Q18 ASK FOR EACH CODED 1-6 AT Q9

As far as you know, are each of the following services regulated?

Please select all that apply. MULTICODE

	Yes – is regulated	No – is not regulated	Don't know
INSERT LIST FROM Q9	1	2	3

Q19 ASK FOR EACH SERVICE CODED YES (CODE 1 AT Q18)

Who do you think is responsible for regulating **<INSERT SERVICE FROM Q9>**?

The TV channels themselves/The provider of the content (e.g. iPlayer, LoveFilm, YouTube etc.) (i.e. the service making it available to users) 1
The programme maker or producer 2
The internet service provider (ISP) (e.g. TalkTalk, BT Broadband etc) 3
The police 4
Self-regulated i.e. the Service providers themselves 5
ASA/Advertising Standards Authority 6
ATVOD – Authority for Television On Demand 7
BBC 8
BBC Trust 9
BBFC/British Board of Film Classification 10
BSC/Broadcasting Standards Commission 11
MediaWatch/National Viewers and Listeners Association 12
Ofcom/Office of Communications 13
The Government (Inc Northern Ireland Assembly/Scottish Executive/Welsh Executive) 14
Other (please type in) 15
Don't know 16

Q20 ASK ALL WHO CODE 1 AT Q18

Do you think the amount of regulation for each of the following is too much, too little or about the right amount?

Please select one answer for each. SINGLE CODE

		Too much	**Too little**	**About the right amount**	**Don't know**
INSERT LIST OF SERVICES CODED 1 AT Q22	(49)	1	2	3	4
All online and on-demand TV or video services <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >>	(48)	1	2	3	4

Q21 ASK ALL WHO HAVE EVER USED ANY SERVICE AT Q9

Some services provide tools to report online or on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >>.

For example, you can let the service know that you did not like their content because it was offensive or invaded someone's privacy by 'flagging' it (i.e. reporting it by pressing a button). Have you ever seen this type of reporting tool on any of the services that you use?

Please select as many as apply. MULTICODE

(53)

INSERT LIST OF SERVICES USED FROM Q9 1

Q22 ASK ALL WHO KNOW A REPORTING TOOL IS AVAILABLE FOR EACH RELEVANT SERVICE AT Q21

Have you ever reported content on <INSERT RELEVANT SERVICE FROM Q21> using its reporting tool?

Please select one. SINGLE CODE

(54)

Yes.. 1
No 2
Don't know 3

Q22a When accessing online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> have you ever noticed being asked for your age before accessing content (e.g. by ticking a box to indicate you are over 16 or 18)?

SINGLE CODE

Yes 1
No 2
Don't Know 3

DEVICE-BASED CONTENT REGULATION

Now we'd like you to think about the regulation of online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> viewed via different devices.

ASK FOR EACH DEVICE SELECTED AT Q10

Q23A Thinking about all the content we have been talking about, what level of regulation do you think **there should be** when people watch these services on **<INSERT DEVICE>**?

So, on a scale of 1 to 5, where 5 is they should be highly regulated, and 1 is they should not be regulated at all, do you think these online and on-demand TV and video services <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> should be regulated on **<SELECTED DEVICE AT Q10>**?

INSERT TEXT FOR SELECTED DEVICE ABOVE THE BOX
RESPONSES TO BE SHOWN HORIZONTALLY AS IN THE QUESTIONNAIRE

1 – **Should not be regulated at all**	2	3	4	5 – **Should be highly regulated**
1	2	3	4	5

ASK FOR EACH DEVICE SELECTED AT Q10

Q23B As far as you know, do you think regulation applies to the kind of online and on-demand TV/Video content <<TO BE SHOWN AS HOVER OVER TEXT (e.g. TV programmes, film, video clips, video podcasts or anything else you have watched online or on-demand)>> we've been talking about when you view it on each of the following devices?

Please select all that apply. MULTICODE

	Yes – is regulated	**No – is not regulated**	**Don't know**
INSERT LIST FROM Q10	1	2	3

Q24 ASK ALL

Thinking about TV and video content <<TO BE SHOWN AS HOVER OVER TEXT (e.g. TV programmes, film, video clips, video podcasts or anything else you have watched online or on-demand)>> that people can watch online in the UK which is delivered by foreign service providers (based outside of the UK), do you think it should be regulated more, the same amount or less than content delivered by UK service providers. Or it should not be regulated at all?

Please select one. SINGLE CODE

(56)

I think it should be more regulated than that from UK service providers 1
I think there should be the same level of regulation for both...2
I think it should be less regulated than that from UK service providers 3
I do not think there should be any regulation of this type of content shown online or on-demand
.... 4
Don't know 5

W2 ONLY
Q24A ASK ALL

Do you regularly play online games on any device (e.g. via a PC/Mac/laptop, games console connected to a TV, tablet, smartphone etc.)?

Yes..1
No 2
Don't know 3

W2 ONLY
Q24B ASK ALL PLAYING GAMES ONLINE (CODE 1) AT Q24A

Has anything that you have seen whilst playing an online game **caused you any concern**?

When answering, please think about things that have concerned you **personally**, rather than what you think might cause concern to others.

Yes..1
No 2
Don't know 3

W2 ONLY
Q24C ASK ALL WHO HAVE SEEN SOMETHING OF CONCERN (CODE 1) AT 24B

And what kind of things have caused you concern personally whilst playing an online game?

Please type in.

TV SECTION - ASK ALL

Q25A ASK ALL

Which, if any, of these types of television/TV service does your household receive at the moment?

SCRIPTER: MULTICODE OK FOR CODES 1-8. SINGLE CODE ONLY FOR CODES 9-11

Please select all that apply.

Q25B ASK ALL CODING MORE THAN ONE AT Q25A (CODES 1-8). OTHERS SKIP TO Q33C

And which of these do you consider to be your *main* type of television?

Please select one.
SINGLE CODE

	Q25A	**Q25B**
	(27)	(29)
Cable TV (through Virgin Media)	1	1
Satellite TV (Sky)	2	2
Satellite TV (Freesat)	3	3
Satellite TV (Other)	4	4
Freeview (through a set-top box or digital television set) with ONLY free channels	5	5
Freeview (through a set-top box or digital television set) with free channels PLUS top-up TV (where a subscription can be paid to access additional programmes)	6	6
BT Vision or TalkTalk TV (or similar)	7	7
YouView	8	8
Access TV content online via the internet (using a tablet, laptop etc.)	9	9
No TV set in household and do not access TV content via the internet SINGLE CODE	10 CLOSE	10
Don't know DO NOT READ OUT	11	11

Q25C ASK ALL WITH SATELLITE TV AT Q25A (CODES 2-4)

Do you use your satellite television service to receive subscription channels or free-to-air services only? IF NECESSARY - Do you pay a monthly subscription fee on top of what you paid to have the satellite dish installed?

Please select one.
SINGLE CODE

(31)
Receive subscription channels (pay a monthly subscription fee)..1
Free to air services (no monthly subscription fee)..2
Don't Know 3

ASK ALL

CLASSIFICATION: TO BE ASKED AT END OF INTERVIEW

We are now moving on to the final few questions. As you probably know, it is necessary in market research surveys to interview a wide cross-section of the public. The next few questions about yourself are just to ensure our sample is balanced.

Q26 ASK ALL

On a scale of 1-10, how much do you agree with the following statements, where 1 is not at all and 10 is a great deal?

	1 - not at all	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 - a great deal**
I always keep up with new technology	1	2	3	4	5	6	7	8	9	0
Computers confuse me - I'll never get used to them	1	2	3	4	5	6	7	8	9	0
I prefer to wait until new technology products have become cheaper before thinking about buying them	1	2	3	4	5	6	7	8	9	0

ASK ALL

Q27 What is the highest qualification of the main income earner in your household?

Please select one.
SINGLE CODE

No qualifications 1
Below NVQ1 - entry levels 1-3 2
Up to 4 O levels, or up to 4 GCSEs grade A to C, or NVQ level 1 or the equivalent 3
5 O levels, or 5 GCSEs grade A to C, or NVQ level 2 or the equivalent.............................4
A levels, or NVQ level 3 or the equivalent...5
Degree level and above NVQ level 4 or 5 or equivalent 6
Don't know 7

Q28 And is your home....

Please select one.
SINGLE CODE

(19)

Being bought on mortgage 1
Owned outright by household...2
Rented from Local Authority/Housing Association/Trust......................................3
Rented from private landlord 4
Other...5
Don't Know 6

Q29-31 – move up front

Q32A Finally, thinking about the survey overall, what if anything, do you think would have made it easier to understand?
Was there any specific language that you think could have been made clearer?

Please type in

Q33 Thank you very much for your time. That's the end of the interview.

If we have any queries arising from this research, may we contact you to ask you some further questions?

SINGLE CODE

(79)

Yes.....1
No.....2

10. Annex E – Teens questionnaire

Q1

Ofcom on-demand and online Main Tracker 2014 Questionnaire – Teens – FINAL

21199____(8-12)

SURVEY DETAILS Executive name: Tim Barber, Jeremiah Fryer

FIELD DATES: October 2014

Client: Ofcom

INTRODUCTION:

Thank you for agreeing to take part in this survey.

We'd like to ask you a few questions, and then for you to ask one of your children (aged 12-15) to fill in the rest. It will be appropriate for their age range as their views are important to us.

The survey should take about 12-15 minutes.

You'll be able to stop whenever you like and come back and complete it in more than one go, however, we'd ask you to complete the survey by 10th October.

TO BE COMPLETED BY PARENTS/ CARERS

Q2 STANDARD REGION.

In which of the following areas do you live?

Scotland....1
North East....2
North West....3
Yorkshire....4
East Midlands....5
West Midlands....6
Wales....7
East....8
South West....9
South East....10
London....11
Northern Ireland....12

Q4a (29) How many people are there in your household, including yourself and any children? Please include anyone living with you as part of a 'family unit'.

Please type in the number.
SINGLE CODE

Q4b (30) DO NOT ASK

SCRIPTER: CODE SIZE OF HOUSEHOLD FROM Q4a. SINGLE CODE

Single (i.e. 1 person) .... 1 CLOSE
2 people 2
Medium (3-4 people) 3
Large (5+ people) 4

Q4c (31) ASK ALL

Are you the parent or guardian of any children aged 12-15 who live at home with you?

Please select one.
SINGLE CODE

Yes 1
No .... 2 **CLOSE**

Q4d ASK ALL

For this survey we need to interview children aged [INSERT OPEN QUOTAS]

With your permission, will they be available to fill in the survey?

Please select one.
SINGLE CODE

Yes 1
No .... 2 **CLOSE**

Q5 ASK ALL PARENTS

First, just a few question about yourself.

Are you…?

Please select one.

SINGLE CODE

(17)
Working full time (30+ hours per week) 1
Working part-time (8-29 hours per week) 2
Not working (i.e. under 8hrs/week) retired 3
Not working (i.e. under 8hrs/week) unemployed registered/not registered but looking for work) 4
Not working (i.e. under 8hrs/week) student 5
Not working (i.e. under 8hrs/week) housewife/disabled/other 6
Don't Know 7

Q6
ASK ALL

And which of the following best describes the main income earner in your household? If they're retired, please think back to their last job before retirement.

Please note:
1. If you live in a household with others, but have separate finances, do not include them in this question. Only consider those who have shared incomes/ outgoings.
2. If the main income earner has been unemployed for less than 6 months, don't answer 'unemployed', but think back to the last job before that.
3. If they're retired and receiving a pension from employment as well as a state pension, please think back to the last job before retirement.

Please select one.
SCRIPTER: DO NOT DISPLAY GRADE IN SURVEY

(18)

Very senior management; top level civil servant or professional (e.g. surgeon; partner in a law firm; regional bank manager; board director of medium/ large firm) [A]......................................1
Senior or middle management in large organisation; owner of small business; principal officer in civil service/ local government [B] 2
Junior management or professional; or administrative (e.g. most office workers; accounts clerk; secretary; police sergeant) [C1]...3
Skilled manual worker (e.g.; plumber; electrician) [C2]...4
Manual worker (e.g. lorry driver; labourer; hotel porter) [D] 5
Casual worker without regular income; or unemployed for 6 months or longer [E] 6
Retired and receiving a state pension [E]...7
Housewife/ house husband/ looking after family [E]..8
Student [C1]..9

TV SECTION - ASK ALL

Q25A ASK ALL

Which, if any, of these types of television/TV service does your household receive at the moment?

SCRIPTER: MULTICODE OK FOR CODES 1-8. SINGLE CODE ONLY FOR CODES 9-11

Please select all that apply.

Q25B ASK ALL CODING MORE THAN ONE AT Q25A (CODES 1-8). OTHERS SKIP TO Q33C

And which of these do you consider to be your family’s *main* type of television?

Please select one.
SINGLE CODE

	Q25A	**Q25B**
	(27)	(29)
Cable TV (through Virgin Media)	1	1
Satellite TV (Sky)	2	2
Satellite TV (Freesat)	3	3
Satellite TV (Other)	4	4
Freeview (through a set-top box or digital television set) with ONLY free channels	5	5
Freeview (through a set-top box or digital television set) with free channels PLUS top-up TV (where a subscription can be paid to access additional programmes)	6	6
BT Vision or TalkTalk TV (or similar)	7	7
YouView	8	8
Access TV content online via the internet (using a tablet, laptop etc.)	9	9
No TV set in household and do not access TV content via the internet SINGLE	10 CLOSE	10

CODE		
Don't know DO NOT READ OUT	11	11

Q25C ASK ALL WITH SATELLITE TV AT Q25A (CODES 2-4)

Do you use your satellite television service to receive subscription channels or free-to-air services only? IF NECESSARY - Do you pay a monthly subscription fee on top of what you paid to have the satellite dish installed?

Please select one.
SINGLE CODE

(31)

Receive subscription channels (pay a monthly subscription fee)..1
Free to air services (no monthly subscription fee)..2
Don't Know 3

ASK ALL

Q27 What is the highest qualification of the main income earner in your household?

Please select one.
SINGLE CODE

No qualifications 1
Below NVQ1 - entry levels 1-3 2
Up to 4 O levels, or up to 4 GCSEs grade A to C, or NVQ level 1 or the equivalent...........3
5 O levels or 5 GCSEs grade A to C, or NVQ level 2 or the equivalent..............................4
A levels, or NVQ level 3 or the equivalent...5
Degree level and above NVQ level 4 or 5 or equivalent 6
Don’t know...7

Q28 And is your home....

Please select one.
SINGLE CODE

(19)

Being bought on mortgage 1
Owned outright by household..2
Rented from Local Authority/Housing Association/Trust..3
Rented from private landlord 4
Other..5
Don't Know 6

TO BE COMPLETED BY CHILDREN

Q6A We would now like to ask one of your children aged 12-15 a series of questions about a topic that is appropriate for their age range as their views are important to us. Would you be happy to let your child participate in this survey?
SINGLE CHOICE

1. Yes
2. No

⇨ If YES at Q6A, then show i72
⇨ If NO at Q6A = **CLOSE**

I72= Thank you. Please allow your child to answer the rest of the survey. If they have any problems then you can help them if you like.

Q6B First of all, can I just check how old you are....?
SINGLE CHOICE

Younger than 12	1	**= CLOSE**
12	2	
13	3	
14	4	
15	5	
Over 15	6	**= CLOSE**

Q6C And are you a...?
SINGLE CHOICE

Boy..1
Girl 2

DEVICES - ASK ALL

Q7: Have you watched anything online or on-demand such as TV programs, video, clips or films in the last 12 months?

THE FOLLOWING TO APPEAR AS LIGHT GREY, ITALICISED TEXT

*By **online or on-demand** we mean viewing TV or video content on a TV that offers online/ on-demand services or through a device connected to the Internet (e.g. PC/laptop, tablet, Smartphone).*

*By **TV or video content** we mean things such as TV programmes, films, video clips, video podcasts or anything else you have watched online or on-demand.*

SINGLE CODE
Yes 1
No 2
Don't Know 3

ASK ALL
Q7T Have you watched YouTube in the past 12 months?

SINGLE CODE
Yes 1
No 2
Don't Know 3

ASK ALL
Q8 Which of these do you ever use?

Please select all that apply.
MULTICODE
IF NONE (CODE 11) FOR EVER USE, CLOSE.

	Q8
Set-top box for on-demand content **with a subscription service** (e.g. Virgin Media/Sky) – connected to a TV	1
Set-top box without a subscription service (e.g. Freeview/Freesat/YouView/Now TV) – connected to a TV	2
Smart TV (a new type of TV connected to the internet that can display online content directly onto your TV screen without the need for a computer; set-top box or games console). Sometimes referred to as a "Connected TV" or "Hybrid TV"	3
Smartphone (i.e. a phone on which you can easily access emails, download files and applications, and generally surf the internet, e.g. BlackBerry, iPhone and Android phones such as the Samsung Galaxy)	4
PC/Mac/laptop	5
Tablet computer (e.g. iPad/Kindle Fire HD)	6
Games console (e.g. PlayStation/Xbox/Wii/ PS3) – connected to a TV	8
Other internet connected **player or box that you use for viewing** TV/ video content (e.g. Roku/ Apple TV/Google TV/Google Chromecast) – connected to a TV	9
None of the above	10
Don't know	11

Q9 ASK ALL

So looking at the following list of **services**, please could you say how often you typically watch each of these?
If you never watch a service, please say whether or not you were aware of it before this survey.
Please select one answer for each. SINGLE CODE
RESPONDENT MUST CODE 'EVER' (CODES 1-5) FOR AT LEAST ONE SERVICE TO CONTINUE, OTHERWISE CLOSE.
ROTATE ORDER

	Every day	**Several times a week**	**At least once a week**	**At least once a month**	**Less than once a month**	**Aware of the service but not viewed in the last 12 months/ have never viewed**	**Not aware of this service**
TV **catch up** services (e.g. BBC iPlayer, ITV Player, 4oD, Demand 5, Now TV)	1	2	3	4	5	6	7
On-line **video rental** services downloaded or streamed (e.g. Blinkbox, Amazon Prime Instant Video, Netflix)	1	2	3	4	5	6	7
Free Video On-demand content available **through your subscription service** provider (e.g. Virgin Media/Sky Go)	1	2	3	4	5	6	7
Paid Video On-demand content available **through your subscription service** provider (e.g. film rental on a pay per view basis on Virgin Media, Sky Go)	1	2	3	4	5	6	7
Official YouTube channels from brands/ organisations you are familiar with (e.g. 4oD, BBC Worldwide, Jamie Oliver's Food Tube, Top Gear etc.)	1	2	3	4	5	6	7
Other **TV or video channels** available **online** (e.g.southparkstudios.co.uk, Vevo.com)	1	2	3	4	5	6	7
YouTube **videos** uploaded **by friends, family or other YouTube users** (i.e. non-professional)	1	2	3	4	5	6	7
Video content posted **on social networking sites** other than YouTube (e.g. Facebook, Twitter, blogs, Vimeo etc.)	1	2	3	4	5	6	7
Video content you have paid for **on digital or online stores** (e.g. iTunes Store, Google Play etc.)	1	2	3	4	5	6	7
Video content **on news websites** (e.g. The Sun/ The Guardian/ The Huffington Post/ www.bloomberg.tv etc.)	1	2	3	4	5	6	7

Q10 ASK ALL VIEWING AT LEAST ONE SERVICE 'EVER' (CODES 1-5) AT Q9
FILTER- ONLY SHOW DEVICES SELECTED AT Q8

How often do you personally use each of the following **devices** to view **online or on-demand TV or video content** at home or elsewhere?

Please select one answer for each. SINGLE CODE
RESPONDENT MUST CODE 'EVER' (CODES 1-5) FOR AT LEAST ONE DEVICE TO CONTINUE, OTHERWISE CLOSE. ROTATE ORDER

	Every day	Several times a week	At least once a week	At least once a month	Less than once a month	Never	Don't know
Set-top box for on-demand content **with a subscription service** (e.g. Virgin Media/Sky) – connected to a TV	1	2	3	4	5	6	7
Set-top box without a subscription service (e.g. Freeview/Freesat/YouView/Now TV) – connected to a TV	1	2	3	4	5	6	7
Smart TV (a new type of TV connected to the internet that can display online content directly onto your TV screen without the need for a computer; set-top box or games console). Sometimes referred to as a "Connected TV" or "Hybrid TV"	1	2	3	4	5	6	7
Smartphone (i.e. a phone on which you can easily access emails, download files and applications, and generally surf the internet, e.g. BlackBerry, iPhone and Android phones such as the Samsung Galaxy)	1	2	3	4	5	6	7
PC/Mac/laptop	1	2	3	4	5	6	7
Tablet computer (e.g. iPad/Kindle Fire HD)	1	2	3	4	5	6	7
Games console (e.g. PlayStation/ Xbox/Wii/PS3) – connected to a TV	1	2	3	4	5	6	7
Other internet connected **player or box that you use for viewing** TV/video content (e.g. Roku/Apple TV/Google TV/Google Chromecast)) – connected to a TV	1	2	3	4	5	6	7

Q11 ASK ALL VIEWING AT LEAST ONE SERVICE AT LEAST 'EVER' (CODES 1-5) AT Q9

And which of these devices do you view each of these services on? You can select more than one device for each service

Please select all that apply for each. MULTICODE

SCRIPTER: ONLY SHOW DEVICES ACROSS THE TOP USED 'EVER' (CODES 1-5) AT Q10 AND SERVICES DOWN THE SIDE USED 'EVER' (CODES 1-5) AT Q9
ALLOW MULTICODE FOR RESPONSES IN EACH ROW APART FROM NONE OF THESE

	INSERT LIST FROM 12	**None of these (SINGLE CODE)**
INSERT LIST FROM Q9	1	2

Now we'd like to ask you some questions about your views on the online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> that you have seen on the services we have been discussing.

Q12 ALL VIEWING AT LEAST ONE SERVICE AT LEAST 'EVER' (CODES 1-5) AT Q9

Thinking about all the **online or on-demand TV or video content** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> you watch nowadays, has anything that you have seen on any online or on-demand service **caused you any concern**?

When answering, please think about things that have concerned you **personally**, rather than what you think might cause concern to others.

*THE FOLLOWING NOTE TO BE INCLUDED FOR EVERY QUESTION WITH HOVER TEXT (Hover over **green text** for a description)*

Yes..1
No 2
Don't know..3

Q12A ASK ALL WHO HAVE SEEN SOMETHING OF CONCERN ON ANY ON-LINE OR ON-DEMAND SERVICE (CODE 1) AT Q12

And what kind of things caused you concern **on the online or on-demand TV or video content** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> you saw on any online or on-demand service?

Please type in.

Q13 ASK ALL WHO HAVE SEEN SOMETHING OF CONCERN ON ANY ON-LINE OR ON-DEMAND SERVICE (CODE 1) AT Q12

You mentioned that you had seen something of concern on any online or on-demand service. What kind of thing caused you concern on the **online or on-demand TV or video content** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> you saw?

Please include anything you typed in at the previous question as well as anything you have not previously mentioned.

Please select as many as apply. MULTICODE

REVERSE ORDER

Bad language	1
Bullying/victimising of me (e.g. People being nasty, mean or unkind to me, or being picked on by other people online)	2
Content harmful to my self-esteem (e.g. things that make me feel under pressure to appear popular or attractive online or gossip that makes me feel bad)	3
Bullying/victimising of others (e.g. People being nasty, mean or unkind to each other or seeing bad things people have written about someone else or being picked on by other people online)	4
Dangerous behaviour – seeing something encouraging it or saying its ok or showing how to do it	5
Defamation/smearing of others (i.e. saying untrue things about other people)	6
Discrimination (e.g. encouraging people to dislike others based on age, gender, disability, religious/non-religious beliefs etc.)	7
Drugs/drug use – seeing something, encouraging it or saying its ok or showing how to do it	8
Eating disorders – seeing something, encouraging it or saying its ok or showing how to do it	9
Exorcism/the paranormal	10
Gossip being spread about someone else even if it was true	11
Incitement to crime (i.e. encouraging people to commit a crime)	12
Incitement to hatred (i.e. encouraging people to dislike others and to be mean to them based on their age, gender, disability, religious/non-religious beliefs etc.)	13
Infringing my privacy (e.g. using photo of me when I hadn't said they could/web page or embarrassing pictures being posted of someone online or sent to other people against their wishes)	14
Misleading/untrue advertising (e.g. the game I bought not being like the one I thought it was, or only working if I pay more money)	15
Offence of religion (i.e. being rude about a religion)	17
People pretending to be me online	18
Seeing things that make me feel sad, frightened or embarrassed (e.g. violence or nakedness or cruelty)	19
Seeing things that are too old for me	20
Seeing something of a sexual nature online	21

Suicide – seeing something, encouraging it or saying its ok or showing how to do it	22
Trolling/online harassment (e.g. people being nasty, mean and unkind to each other)	23
Cruelty to animals	24
Violence (in general)	25
Other (please type in)	26

Q13A ASK ALL WHO HAVE SEEN SOMETHING OF CONCERN ON ANY ON-LINE OR ON-DEMAND SERVICE (CODE 1) AT Q12
Thinking about each of the things that caused you concern on the **online or on-demand TV or video content** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> you have seen, please say which services you were watching this content on?

PLEASE SELECT AS MANY SERVICES AS APPLY FOR EACH AREA OF CONCERN

	INSERT SERVICES VIEWED FROM Q9 CODES 1-5
INSERT CONCERNS SELECTED AT Q13	
Don't know	

Q14 ASK ALL WHO HAVE SEEN SOMETHING CAUSING CONCERN ON ANY SERVICE (CODE 1 AT Q12)

Thinking about each of the things you've seen on any **online or on-demand TV or video service** <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> in the last 12 months that caused you concern, please can you say what device or devices you were watching at the time?

Please select as many as apply for each. SINGLE CODE

(28)

	INSERT LIST OF DEVICES USED FROM Q10 CODES 1-5
INSERT CONCERNS SELECTED AT Q13	1
Don't recall where I viewed (SINGLE CODE)	

Q15 ASK ALL WHO HAVE SEEN SOMETHING THAT CAUSED CONCERN ON ANY SERVICE IN THE LAST 12 MONTHS (CODE 1 AT Q12)

And how have you generally reacted when you have seen something that caused you concern? In other words, what have you done?

Please select the answers that best apply. MULTICODE

(15)

Stopped viewing 1
Complained/reported to a third party body (e.g. a regulator e.g. Ofcom/BBC Trust/ATVOD) 2
Told your parents...3
Told another family member 4
Told your friends..5
Told someone else 6
Nothing / continued watching content 7
Other (please type in)..8
Don't know/don't remember...9

Q16 ASK ALL COMPLAINING TO A THIRD PARTY (CODE 2) AT Q15

You said you complained to a third party body about the content that caused you concern. Who was this?

ASA/Advertising Standards Authority...1
ATVOD – Authority for Television On-demand 2
BBFC/British Board of Film Classification 3
BSC/Broadcasting Standards Commission..4
MediaWatch/National Viewers and Listeners Association 5
Ofcom/Office of Communications..6
The Government (inc Northern Ireland Assembly/Scottish Executive/Welsh Executive) 7
BBC Trust 8
Other (please type in)..8
Don’t know 9

We'd now like to ask you some questions about the regulation of the online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> we have been discussing.

By regulation we mean official rules and regulations put in place by the Government/ other organisations about what can and cannot be shown.

REGULATION OF SERVICES

Q17 ASK ALL

Thinking about all the types of online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> you are aware of, please can you say how much regulation **there should be** on a scale of 1 to 5, where 5 is this content should be highly regulated and 1 that this content should not be regulated at all.

By regulation, we mean official rules that exist about what can and cannot be shown.

Please select one answer. SINGLE CODE

1 – This type of content should not be regulated at all/ there shouldn't be any official rules about what can be shown	2	3	4	5 – This type of content should be highly regulated /there should be lots of official rules about what can be shown
1	2	3	4	5

Q18 ASK FOR EACH CODED 1-6 AT Q9

As far as you know, are each of the following services regulated?

Please select all that apply. MULTICODE

	Yes – is regulated	No – is not regulated	Don't know
INSERT LIST FROM Q9	1	2	3

Q19 ASK ALL

Who do you think is responsible for regulating online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> we have been talking about**, that is who do you think makes the official rules about what can and can't be seen**?

The Government..1
Broadcaster/channel/station......................................2
The police..3
The internet service provider (ISP)............................4
Ofcom/Office of Communications................................5
Other (please type in)..6
Don't know..7

Q20 ASK ALL WHO CODE 1 AT Q18

Do you think the amount of regulation (i.e. official rules) for each of the following is too much, too little or about the right amount?

Please select one answer for each. SINGLE CODE

		Too much	**Too little**	**About the right amount**	**Don't know**
INSERT LIST OF SERVICES CODED 1 AT Q18	(49)	1	2	3	4
All online and on-demand TV or video services <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >>	(48)	1	2	3	4

Q21 ASK ALL WHO HAVE EVER USED ANY SERVICE AT Q9

Some services provide tools to report online or on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >>.

For example, you can let the service know that you did not like their content because it was offensive or invaded someone's privacy by 'flagging' it (i.e. reporting it by pressing a button). Have you ever seen this type of reporting tool on any of the services that you use?

Please select as many as apply. MULTICODE

(53)

INSERT LIST OF SERVICES USED FROM Q9..

Q22 ASK ALL WHO KNOW A REPORTING TOOL IS AVAILABLE FOR EACH RELEVANT SERVICE AT Q21

Have you ever reported content on <INSERT RELEVANT SERVICE FROM Q21> using its reporting tool?

Please select one. SINGLE CODE

(54)

Yes....................1
No....................2
Don't know....................3

Q22 When accessing online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> have you ever noticed being asked for your age before accessing content (e.g. by ticking a box to indicate you are over 16 or 18)?

SINGLE CODE

Yes....................1
No....................2
Don't Know....................3

Q22a

And have you ever ticked an age box like that so you could watch the content or access the site, even though you were younger than that age?

Yes....................1
No....................2
Don't Know....................3

DEVICE-BASED CONTENT REGULATION

Now we'd like you to think about the regulation of online and on-demand TV or video content <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> viewed via different devices.

ASK FOR EACH DEVICE SELECTED AT Q10

Q23A Thinking about all the content we have been talking about, what level of regulation do you think **there should be** when people watch these services on **<INSERT DEVICE>**?

So, on a scale of 1 to 5, where 5 is they should be highly regulated, and 1 is they should not be regulated at all, do you think these online and on-demand TV and video services <<TO BE SHOWN AS HOVER OVER TEXT e.g. TV programmes, films, video clips, video podcasts or anything else you watch online or on-demand >> should be regulated on **<SELECTED DEVICE AT Q10>**?

INSERT TEXT FOR SELECTED DEVICE ABOVE THE BOX
RESPONSES TO BE SHOWN HORIZONTALLY AS IN THE QUESTIONNAIRE

1 – **Should not be regulated at all**	2	3	4	5 – **Should be highly regulated**
1	2	3	4	5

Q24A ASK ALL

Do you regularly play online games on any device (e.g. via a PC/Mac/laptop, games console connected to a TV, tablet, smartphone etc.)?

Yes....................1
No....................2
Don't know....................3

Q24B ASK ALL PLAYING GAMES ONLINE (CODE 1) AT Q24A

Has anything that you have seen whilst playing an online game **caused you any concern**?

When answering, please think about things that have concerned you **personally**, rather than what you think might cause concern to others.

Yes....................1
No....................2
Don't know....................3

Q24C ASK ALL WHO HAVE SEEN SOMETHING OF CONCERN (CODE 1) AT Q24B

And what kind of things have caused you concern personally whilst playing an online game?

Please type in.

CLASSIFICATION: TO BE ASKED AT END OF INTERVIEW

Q26 ASK ALL

On a scale of 1-10, how much do you agree with the following statements, where 1 is not at all and 10 is a great deal?

	1 - not at all	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 - a great deal**
I always keep up with new technology	1	2	3	4	5	6	7	8	9	0
Computers confuse me - I'll never get used to them	1	2	3	4	5	6	7	8	9	0
I prefer to wait until new technology products have become cheaper before getting them	1	2	3	4	5	6	7	8	9	0

Q32A Finally, thinking about this survey overall, what if anything, do you think would have made it easier to understand?
Was there any specific language that you think could have been made clearer?

Please type in

Q33 Thank you very much for your time. That's the end of the interview.

If we have any queries arising from this research, may we contact you to ask you some further questions?

SINGLE CODE

(79)

Yes...1
No 2

11. Annex F – Table of figures