Audience attitudes to online and on-demand content: Levels of offence and regulatory awareness

Cross Platform Media Tracker 2020

Produced by: BVA BDRC

Fieldwork: January-March & October-December 2020

Summary of key findings

Ofcom
making communications work

Concern regarding online TV or video content is highest among younger adults and teens with around with around one in five claiming to have seen something concerning in the last year.

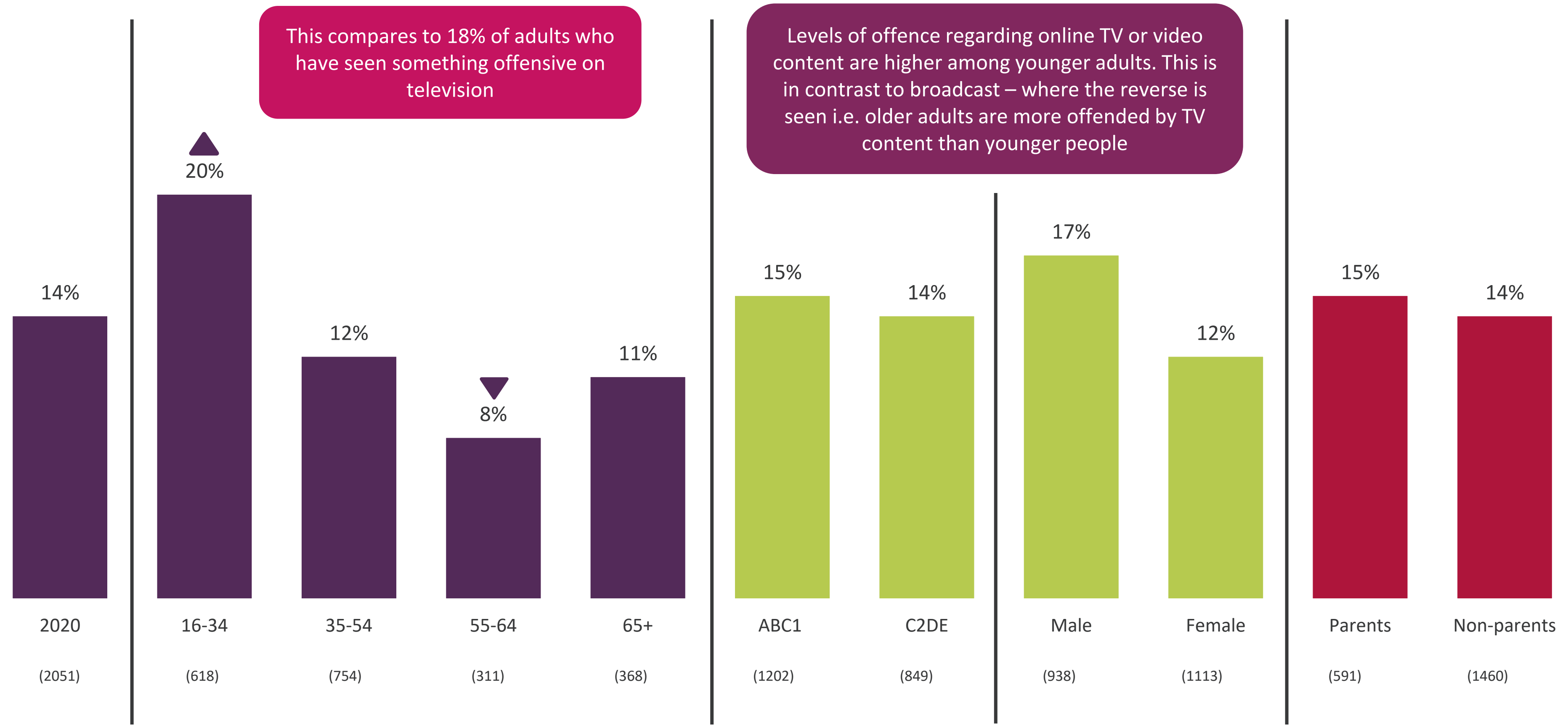
- Around one in seven (14%) adults claim to have seen TV or video content online or on-demand that has caused them some concern in the last year. This compares to 18% of adults who have seen something offensive on broadcast television.
- Levels of concern regarding online TV or video content are higher among younger adults (measuring 20% among 16-34 year olds compared to 8% among 55-64 year olds).
- Levels of concern are higher among **teens**, with over one in five (22%) claiming to have seen concerning on-line or on-demand TV or video in the last year.
- Higher levels of concern among teens and younger adults regarding on-line or on-demand TV or video content is different to the trend seen with broadcast content, where older adults are more likely to say they are offended by television content than younger adults.
- There are a wide range of issues that cause concern regarding on-line or on-demand TV or video content among **adults** and **teens** with bad language gaining the top mention and bullying coming second.
- The majority of adults and teens say they take action when they see something concerning. Adults are most likely to stop viewing whilst teens are most likely to tell their parents or stop viewing.

Whilst regulatory awareness is high for broadcast content, there is more uncertainty regarding on-demand and online services

- Around two in five **adults** think that all type of on-line/on-demand content ***should*** be regulated. However around half (49%) hold no strong opinion.
- More **teens** than adults feel that online/on-demand contents ***should*** be regulated (48% vs 41% adults), but as seen with adults, a significant proportion hold no strong opinion (43%).
- Just under four in five **adults** think broadcast TV and catch up services are regulated.
- Similar perceptions around which services are regulated exist among teens and adults with around four in five **teens** assuming broadcast TV services are regulated. As seen with adults, perceptions of regulation falls the further you move away from broadcast towards video content on websites, such as YouTube.
- Ofcom achieves the most mentions among adults when respondents are asked who they think is responsible for regulating online and on demand content – although a third of adults say they don't know, or do not offer a guess. In contrast, the majority of **teens** believe that the broadcasters/content providers are responsible for regulating online and on demand content.
- The majority of **adults** and **teens** think the amount of regulation is 'about right' across the various platforms and services tested, but this is lower for video content on websites, such as YouTube, compared to linear broadcasting or catch up services

Around one in seven (14%) **adults** claim to have seen TV or video content online or on-demand that has caused them concern in the last year

Overall % who watch on-demand/online who have been concerned by something: In 2020 and sub-groups



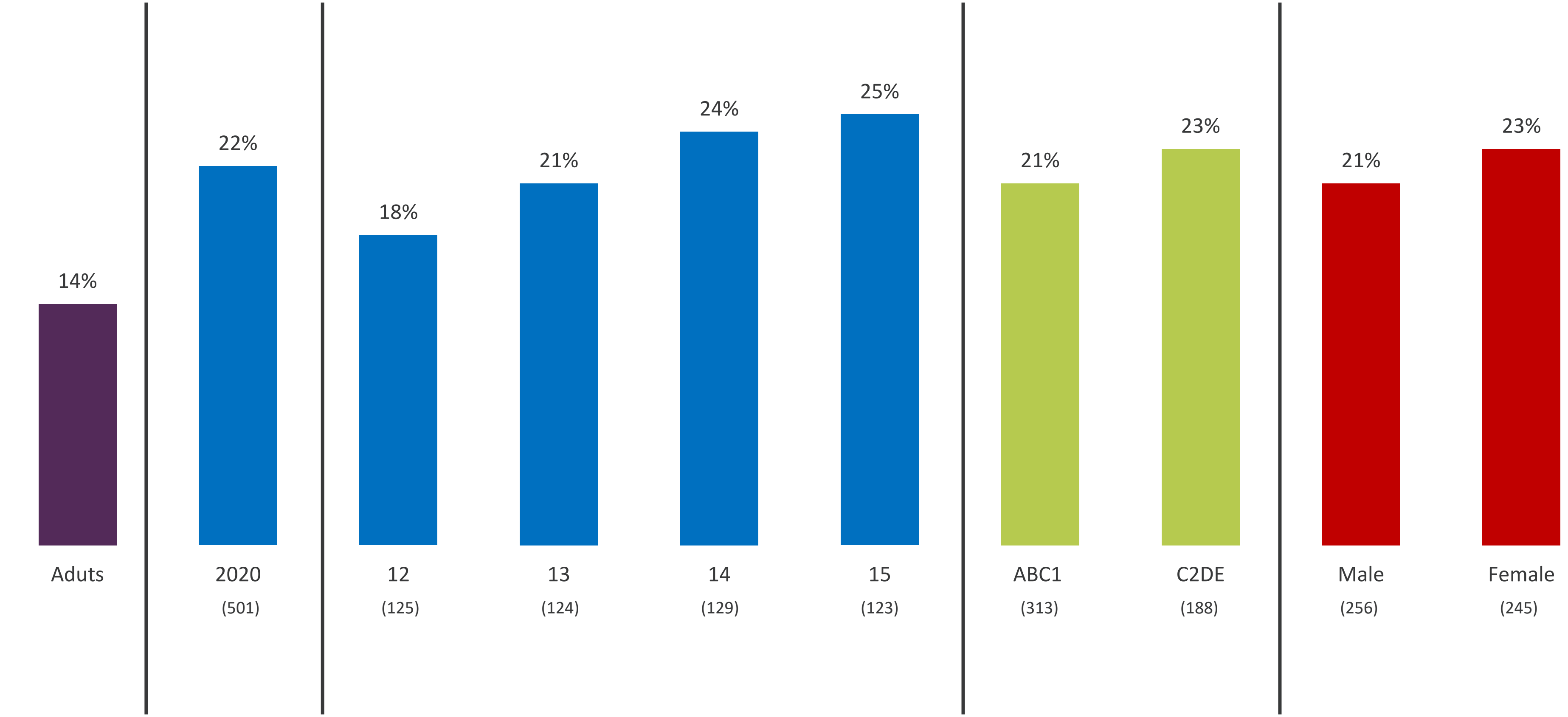
QL1 – Thinking about all the on-line or on-demand TV or video content you watch nowadays, has anything that you have seen caused you any concern?

Base: All who have watched anything on-line or on-demand in the last 12 months (as indicated on chart)

Source: Cross Platform Media Tracker 2020

Levels of concern are higher among **teens** with over a fifth (22%) claiming to have seen concerning on-line or on-demand TV or video in the last

% who watch **on-demand/online content** who have been concerned by something: 2020 sub-groups



QL1 – Thinking about all the on-line or on-demand TV or video content you watch nowadays, has anything that you have seen caused you any concern?

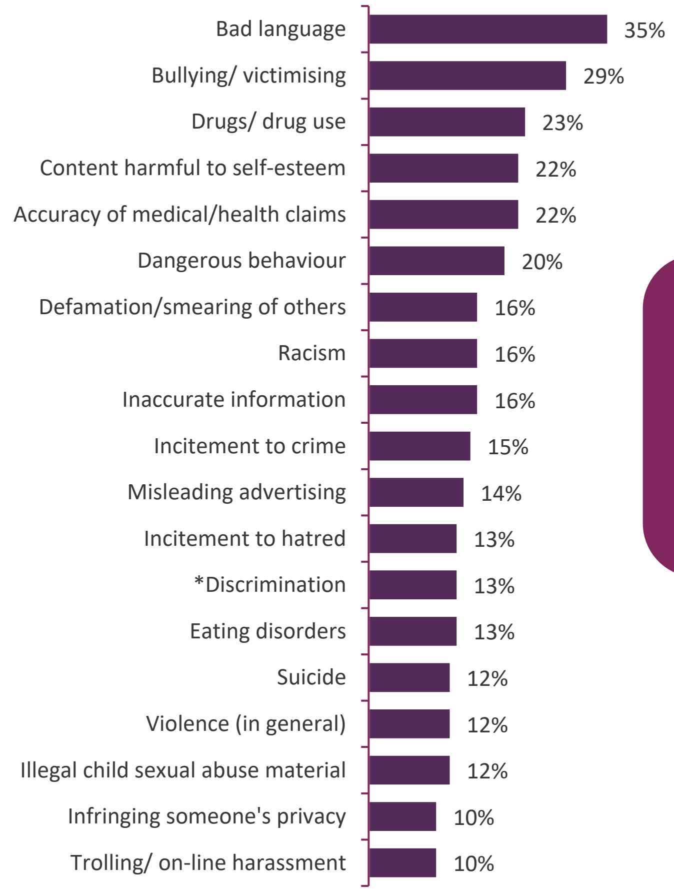
Base: All who have watched anything on-line or on-demand in the last 12 months(as indicated on chart). Prompted, single code. Significance testing shows any difference between 2018 and 2020, between any age group and all 12-15 year olds in 2020, between socio-economic groups and by gender in 2020.

Source: Cross Platform Media Tracker 2020

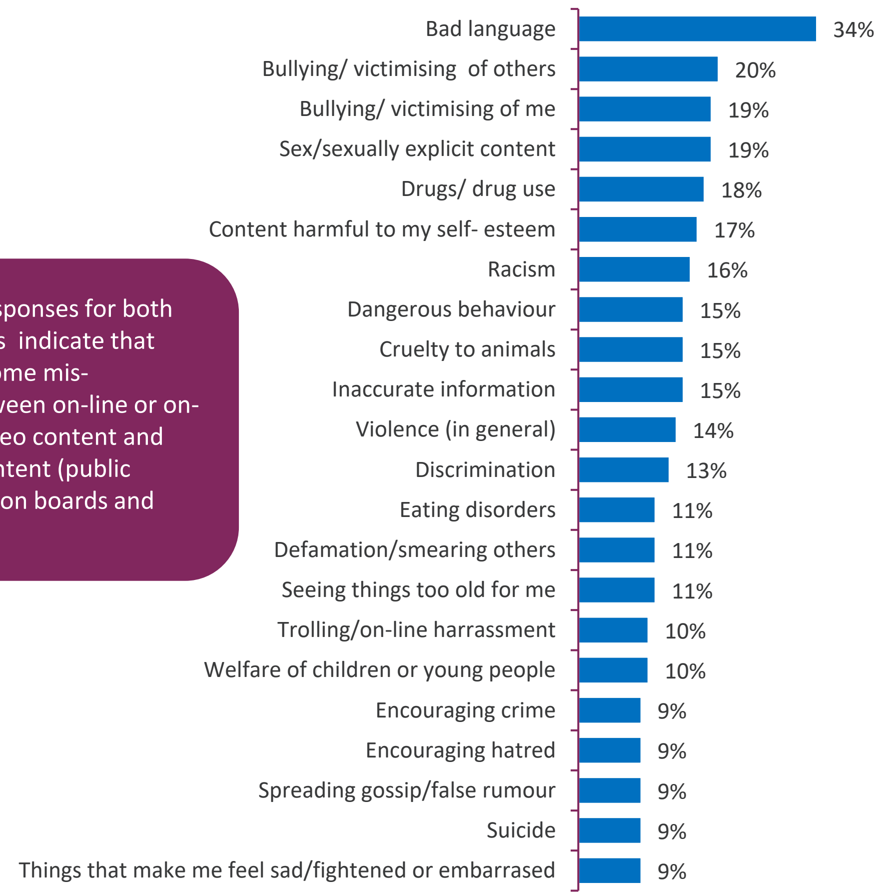
Concerns around **online content** focus on discriminatory treatment and harmful content, as well as a primary concern around offensive language

Ofcom
making communications work
for everyone

Type of material on-line/on-demand which caused concern: 2020



The range of responses for both adults and teens indicate that there may be some mis-attribution between on-line or on-demand TV/ video content and other online content (public forums, discussion boards and social media)



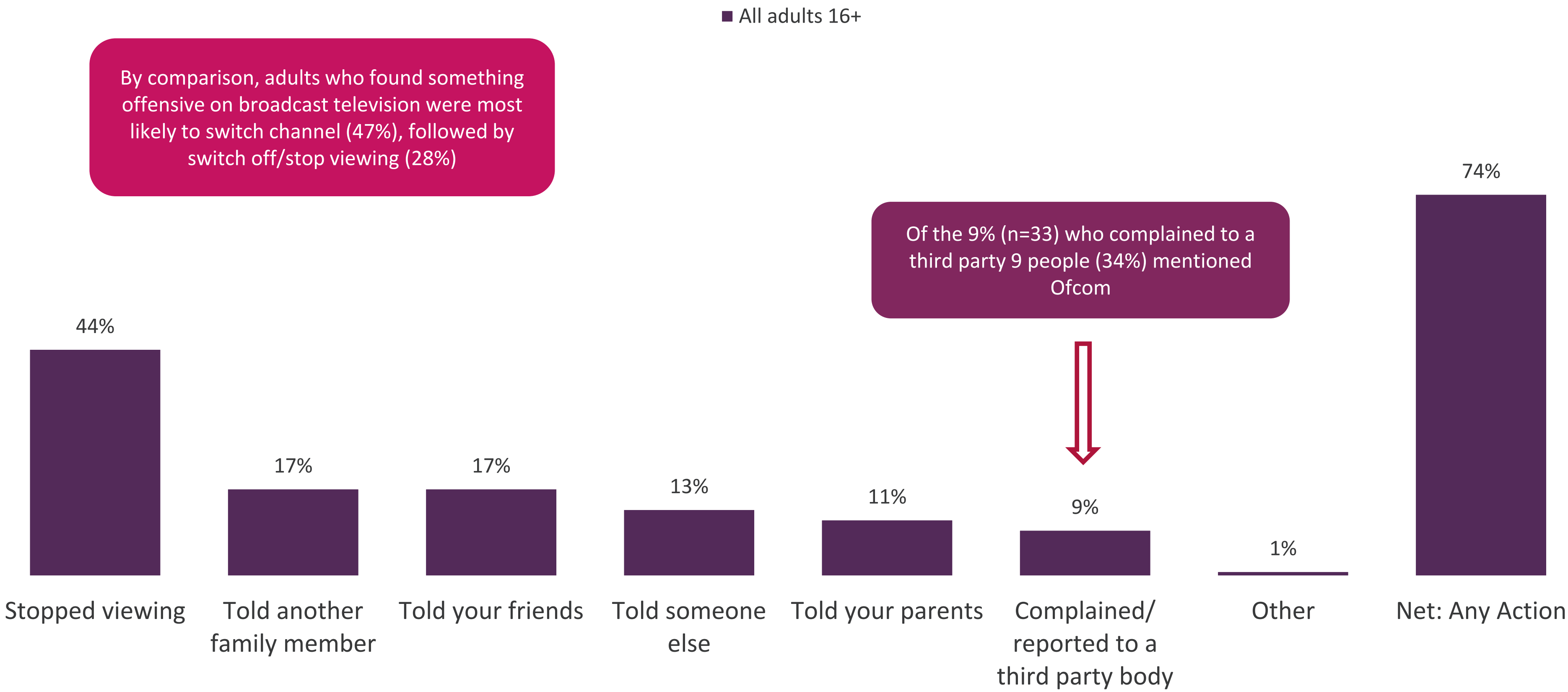
QL2 – What kind of things caused you concern on the on-line or on-demand TV or video content you saw?

Base: All who said they'd seen something of concern on any on-line or on-demand service (14% of adults who watch on-demand content in 2020, N=330). Prompted, multicode.

Source: Cross Platform Media Tracker 2020

Stopping viewing is the most common reaction among **adults** to seeing something that caused concern on-demand/online

Reaction following seeing something which caused concern on-demand/online: 2020



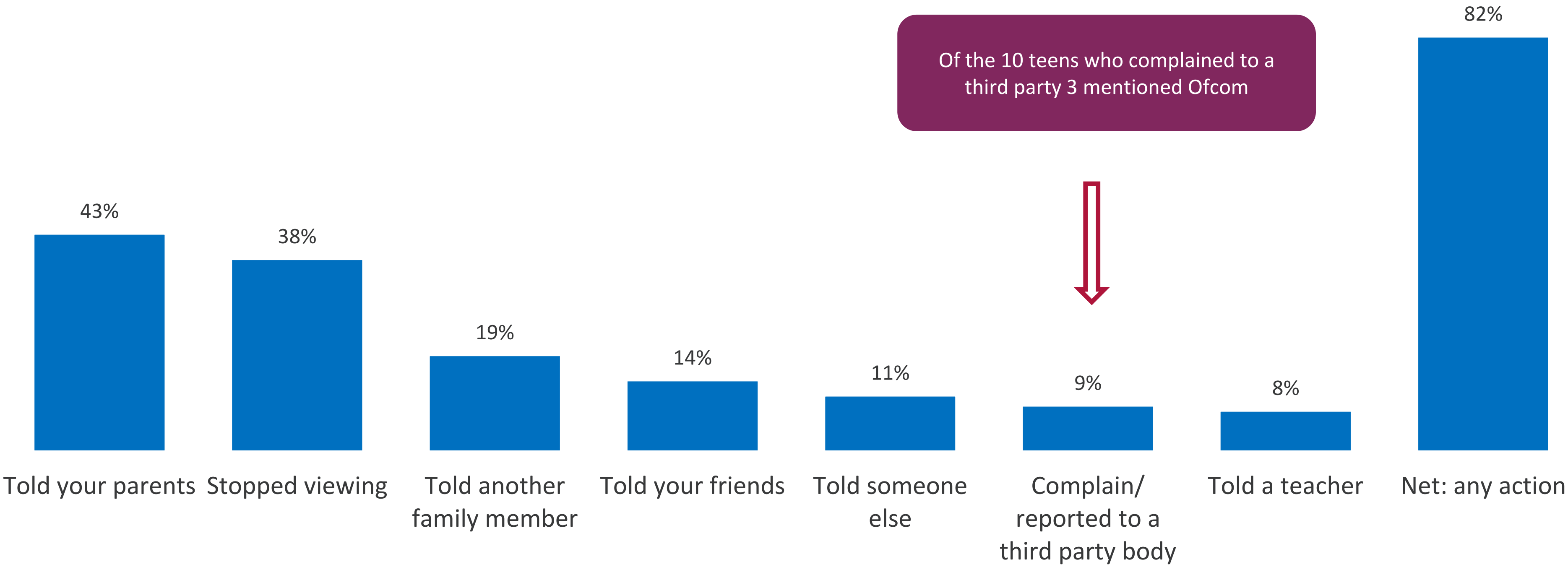
QL7 – And how have you generally reacted when you have seen something that caused you concern? In other words, what have you done?

Base: All who said they'd seen something of concern on any on-line or on-demand service (14% of adults who watch on-demand content) (331) . Prompted, multicode. Significance testing shows any difference between parents and non-parents in 2020.

Source: Cross Platform Media Tracker 2020

Telling parents is the most common reaction to seeing something that caused concern on-demand/online among **teens** – slightly higher than stopping viewing

Reaction following seeing something which caused concern on-demand/online: 2020



QL7 – And how have you generally reacted when you have seen something that caused you concern? In other words, what have you done?

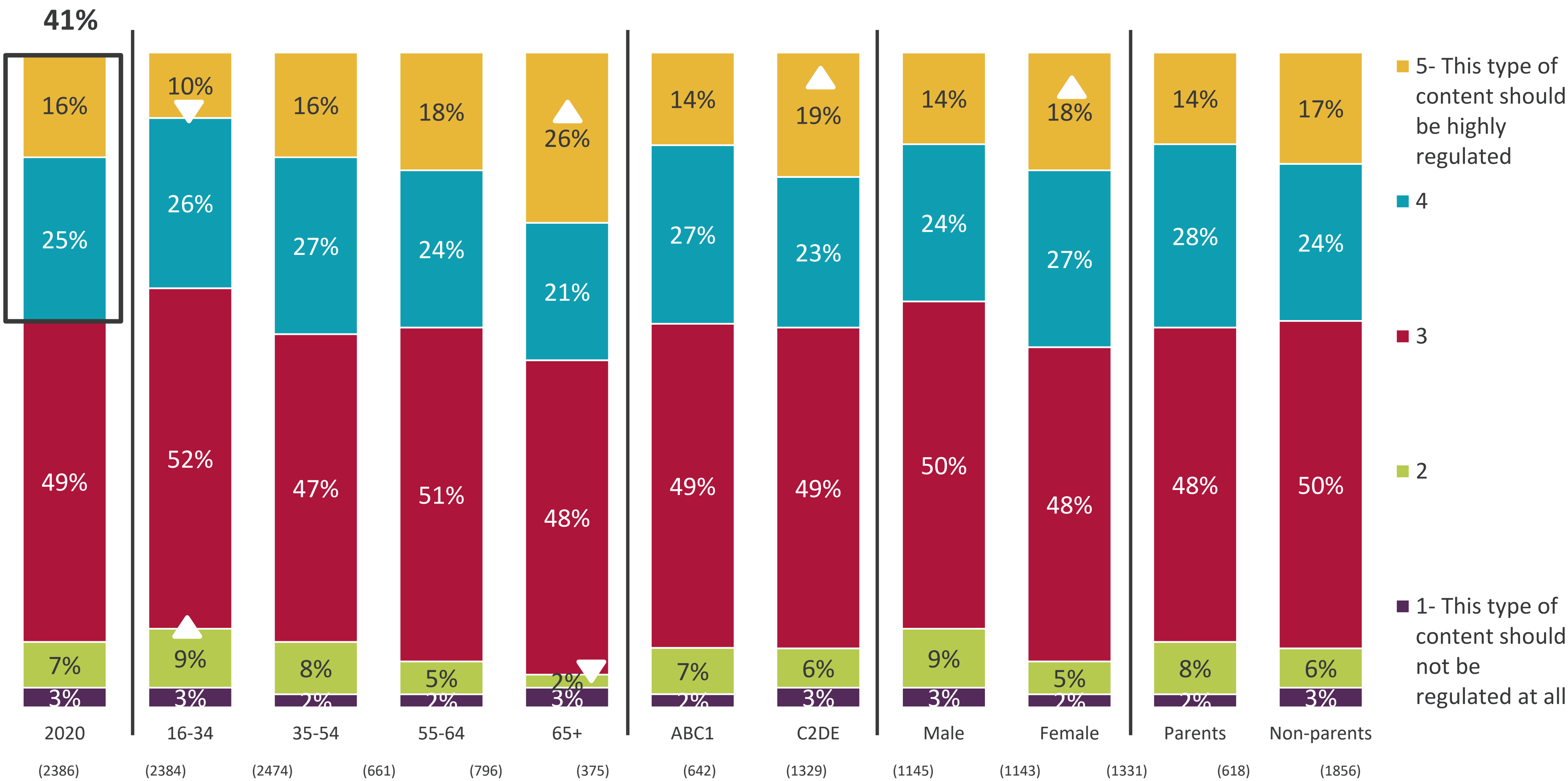
Base: All who said they'd seen something of concern on any on-line or on-demand service (15% of 12-15 year olds who watch on-demand content 2020 (111). Prompted, multicode. *LOW BASE SIZE <100

Source: Cross Platform Media Tracker 2020

Around two in five **adults** think that all type of on-line/on-demand content ***should*** be regulated, however around half (49%) hold no strong opinion

making communications work
for everyone

How necessary people perceive regulation of on-demand/online TV/video content: 2020 and sub-groups



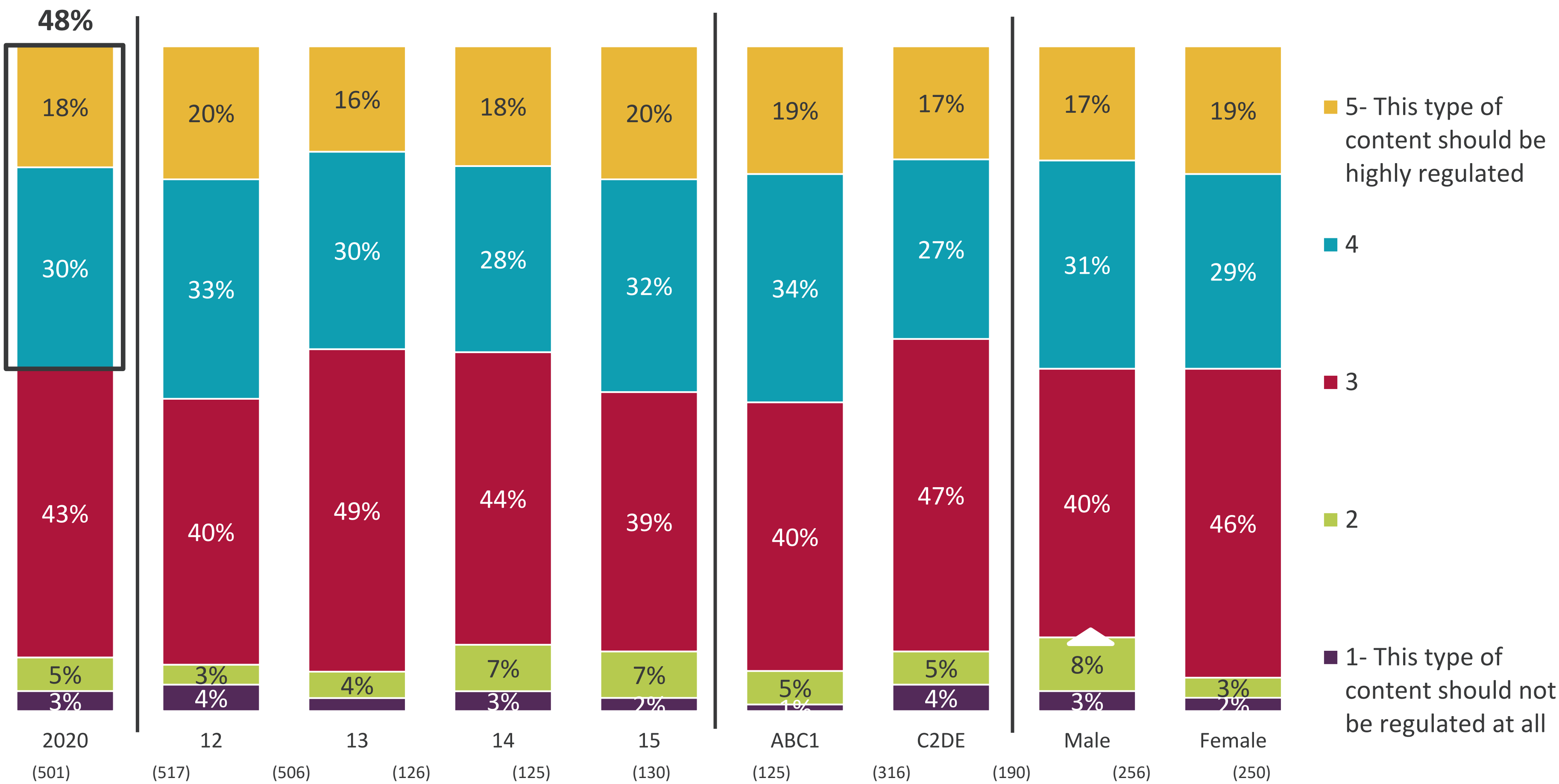
QM1 – Thinking about all the types of online/ on-demand TV or video content you are aware of, please can you say how much regulation there should be on a scale of 1 to 5.

Base: All respondents as indicated in chart. Prompted, single code. Significance testing shows any difference between 2018 and 2020, between any age group and all adults in 2020, between socio-economic groups, by gender and between parents and non-parents in 2020. Dashed line shows where survey method changed.

Source: Cross Platform Media Tracker 2020

More **teens** than adults feel that online/on-demand contents ***should*** be regulated (48% vs 41% adults), but as seen with adults, a significant proportion hold no strong opinion (43%)

How necessary people perceive regulation of on-demand/online TV/video content: 2020 and sub-groups



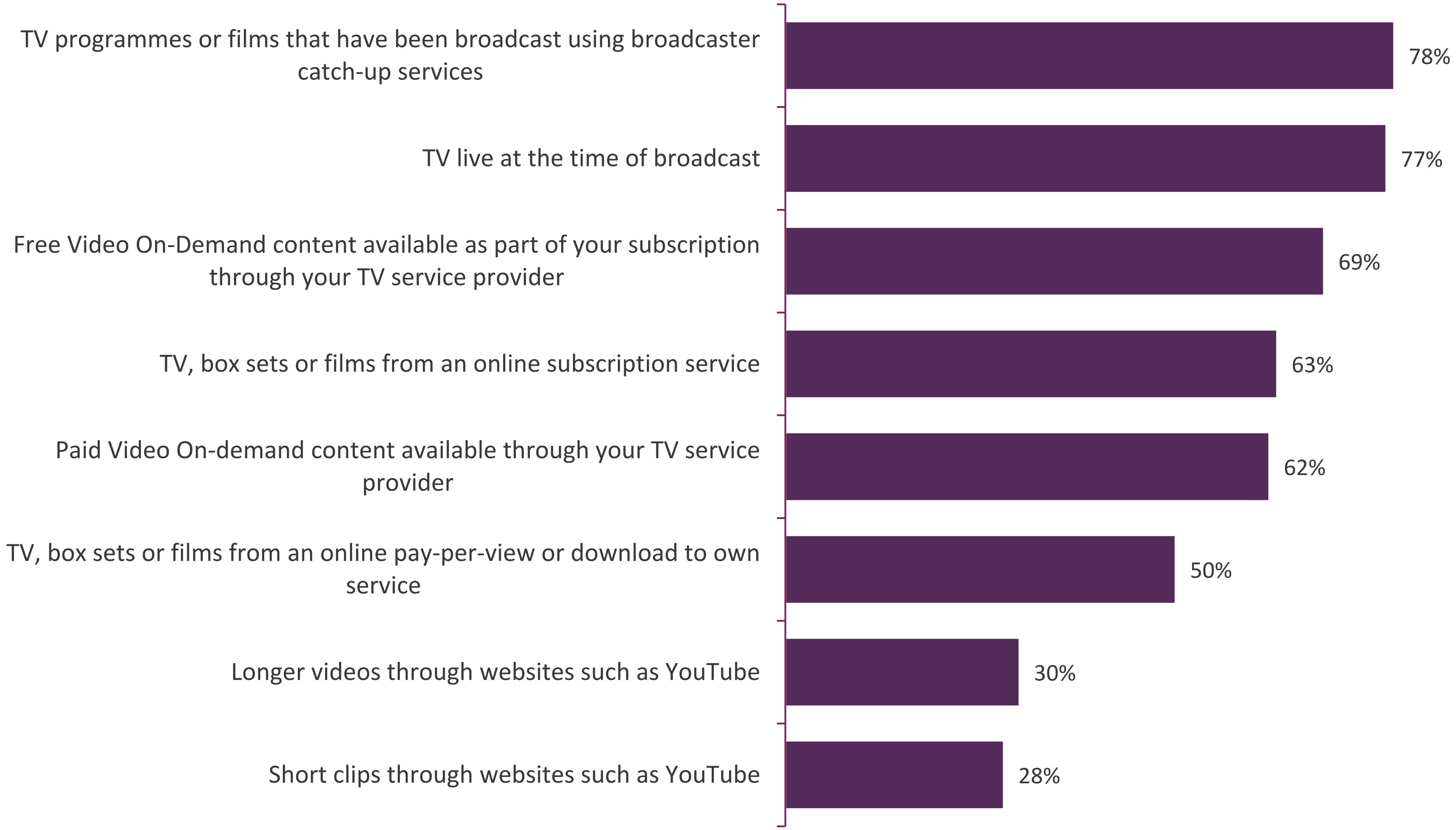
QM1 – Thinking about all the types of online/ on-demand TV or video content you are aware of, please can you say how much regulation there should be on a scale of 1 (this content should not be regulated at all) to 5 (this content should be highly regulated).

Base: All respondents as indicated in chart. Prompted, single code. Significance testing shows any difference between any age group and all 12-15 year olds in 2020, between socio-economic groups and by gender in 2020.

Source: Cross Platform Media Tracker 2020

Just under eight in ten **adults** think broadcast TV and catch up services are regulated Perceptions of regulation fall as you move away from broadcast towards video content on websites, such as YouTube

Awareness of regulation of on-demand/online content: 2020



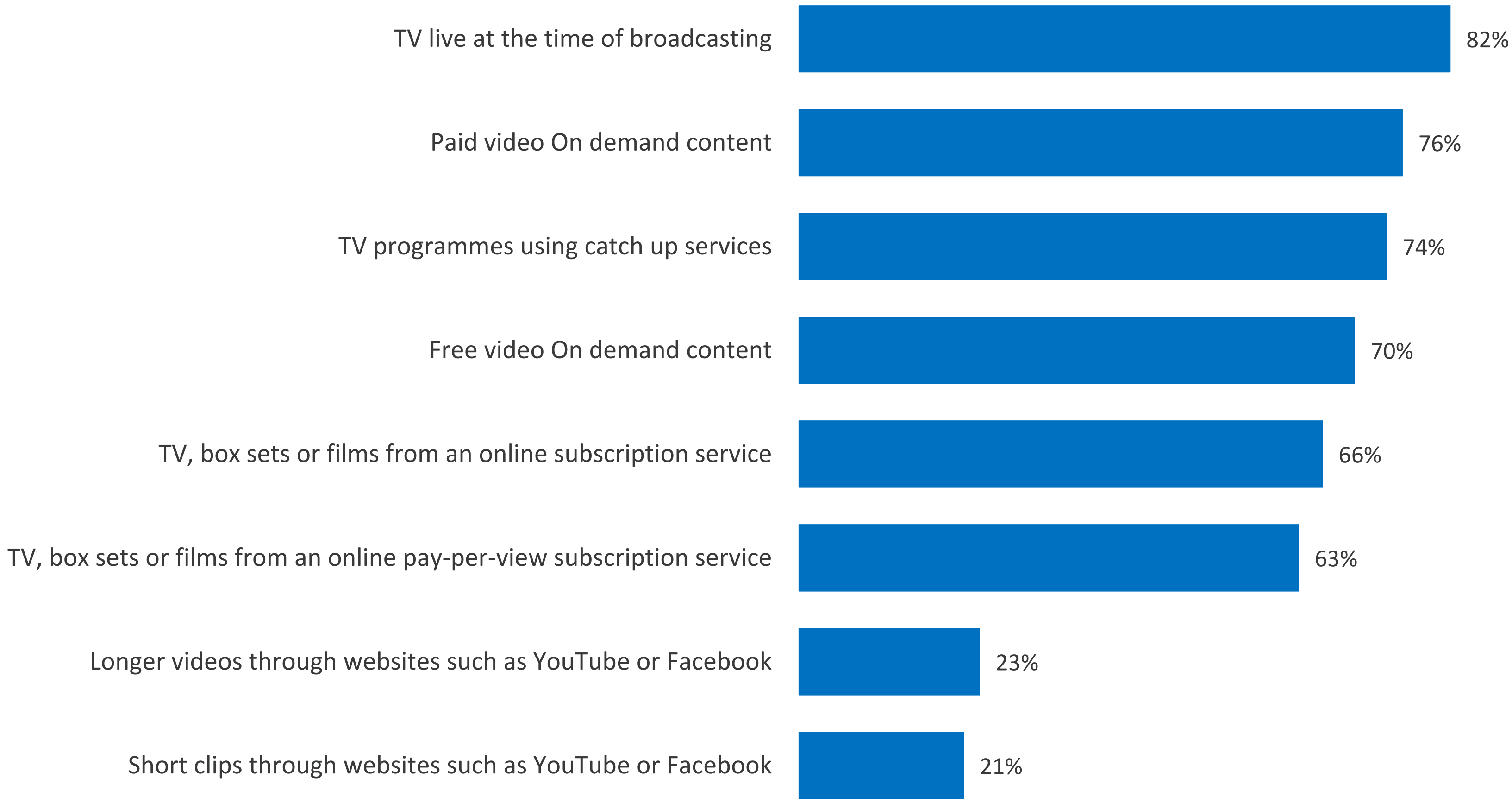
QM2 – As far as you know, are each of the following online services regulated?

Base: All carrying out each viewing activity in the last 12 months (base on chart). Prompted, multicode.

Source: Cross Platform Media Tracker 2020

Similar perceptions around which services are regulated exist among teens and adults with around eight in ten teens believing broadcast TV services are regulated As seen with adults, perceptions of regulation falls the further you move away from broadcast towards video content on websites, such as YouTube

Awareness of regulation of on-demand/online content: 2020



QM2 – As far as you know, are each of the following online services regulated?

Base: All carrying out each viewing activity in the last 12 months (base on chart). Prompted, multicode.

*LOW BASE SIZE <100

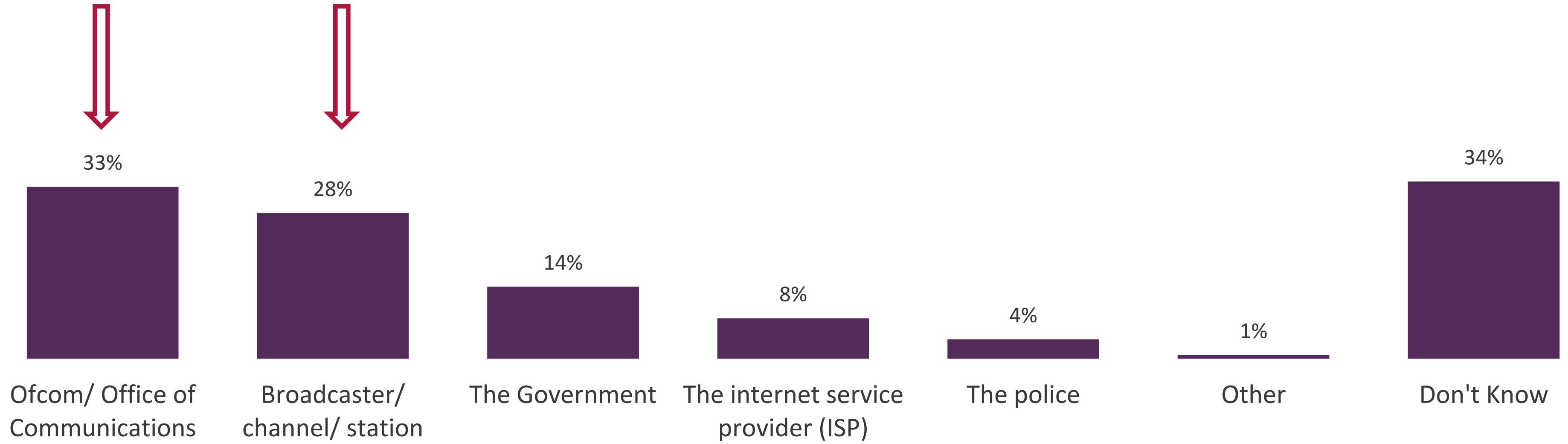
Source: Cross Platform Media Tracker 2020

Ofcom achieves the most mentions among **adults** when respondents are asked who they think is responsible for regulating online and on demand content

making communications work **for everyone**

Awareness of who is responsible for regulating on-demand/online content: 2020

Mentions of Ofcom are higher among the older age groups and higher social grades. Whilst mentions of broadcasters are higher among younger adults (38% mention broadcasters)

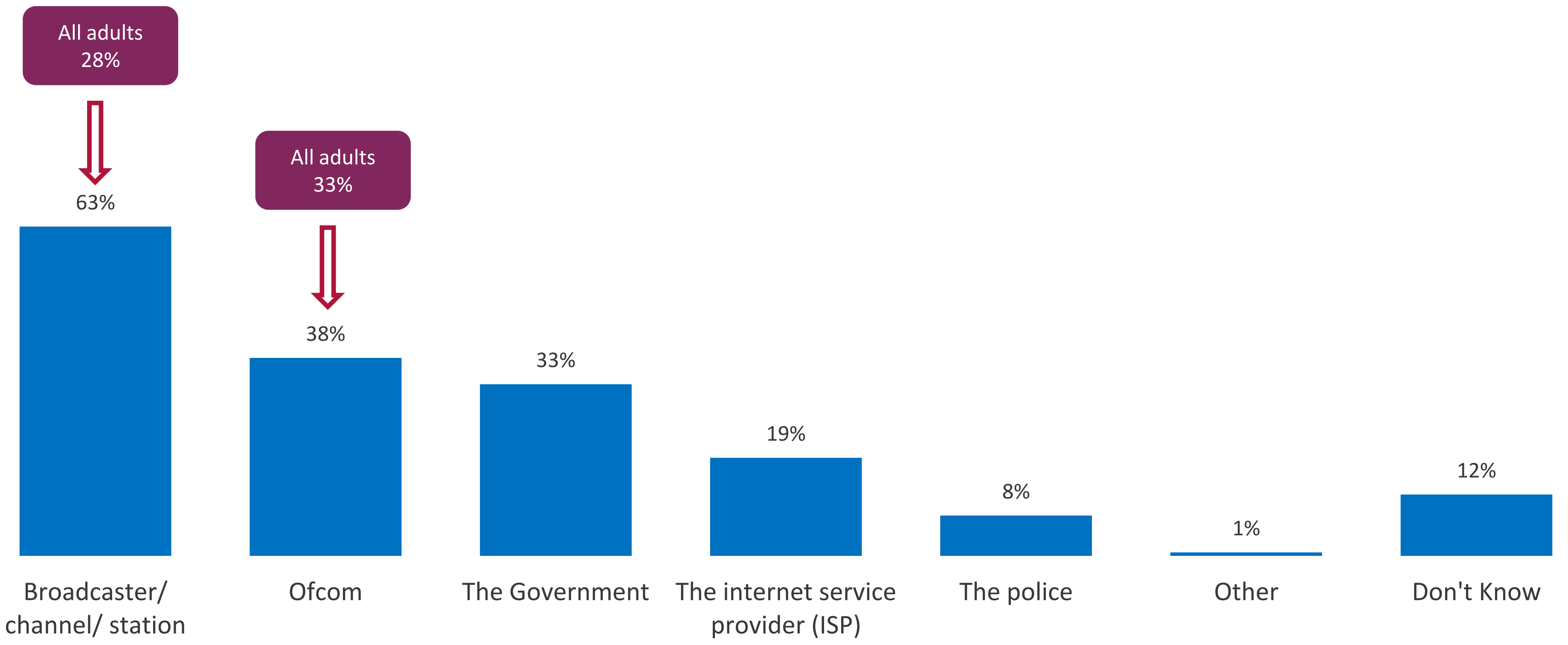


QM3 – Who do you think is responsible for regulating on-line and on-demand TV or video content we have been talking about? Unprompted.
Base: All respondents (2474)
Source: Cross Platform Media Tracker 2020

The majority of **teens** believe that the broadcasters/content providers are responsible for regulating online and on demand content

making communications work for everyone

Awareness of who is responsible for regulating on-demand/online content: 2020



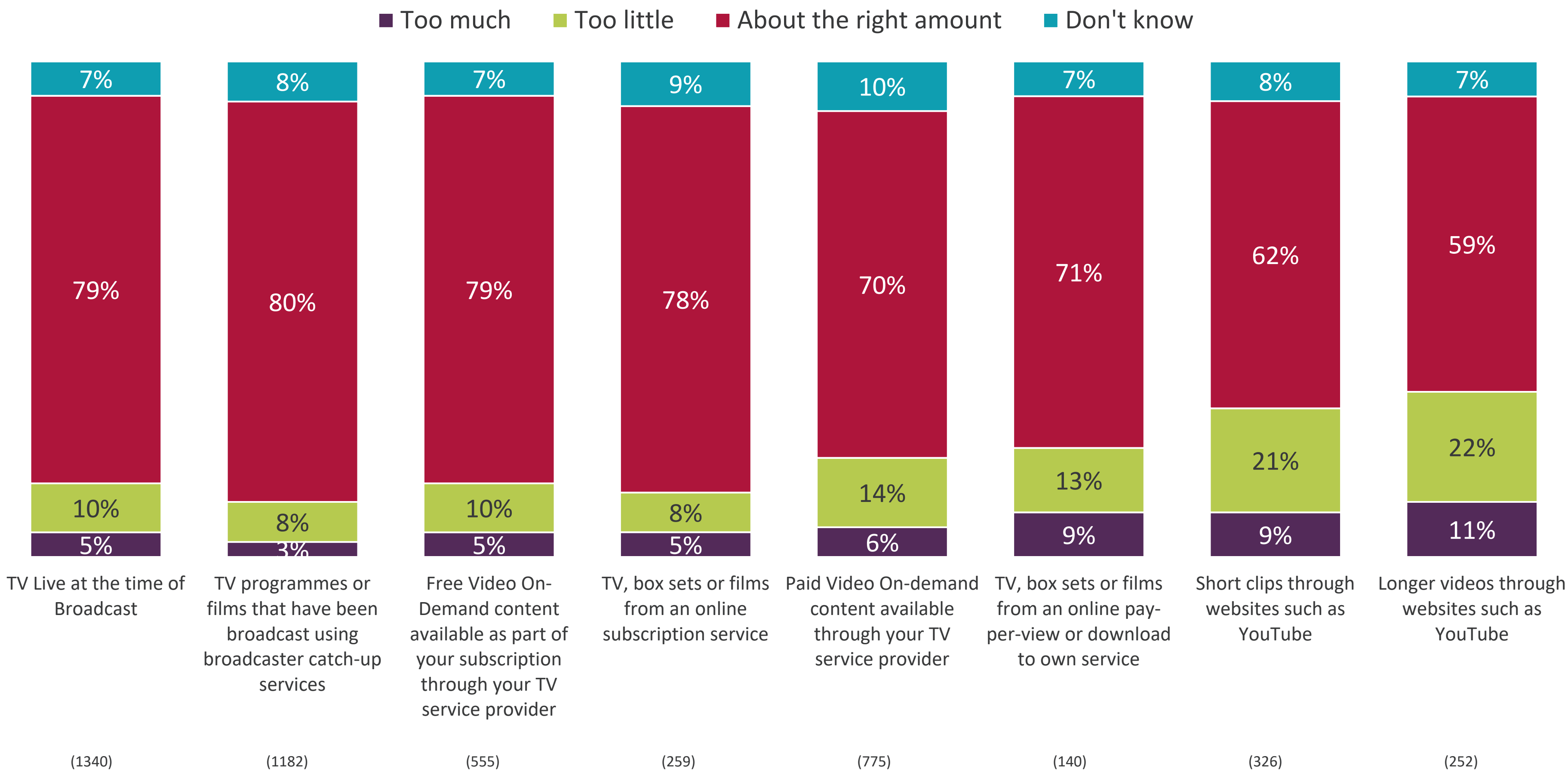
QM3 – Who do you think is responsible for regulating on-line and on-demand TV or video content we have been talking about? Unprompted.

Base: All respondents (506)

Source: Cross Platform Media Tracker 2020

The majority of **adults** think the amount of regulation is 'about right' across the various platforms and services, but this is lower for video content on websites, such as YouTube, compared to linear broadcasting or catch up services

Opinions on current level of on-demand/online regulation: 2020



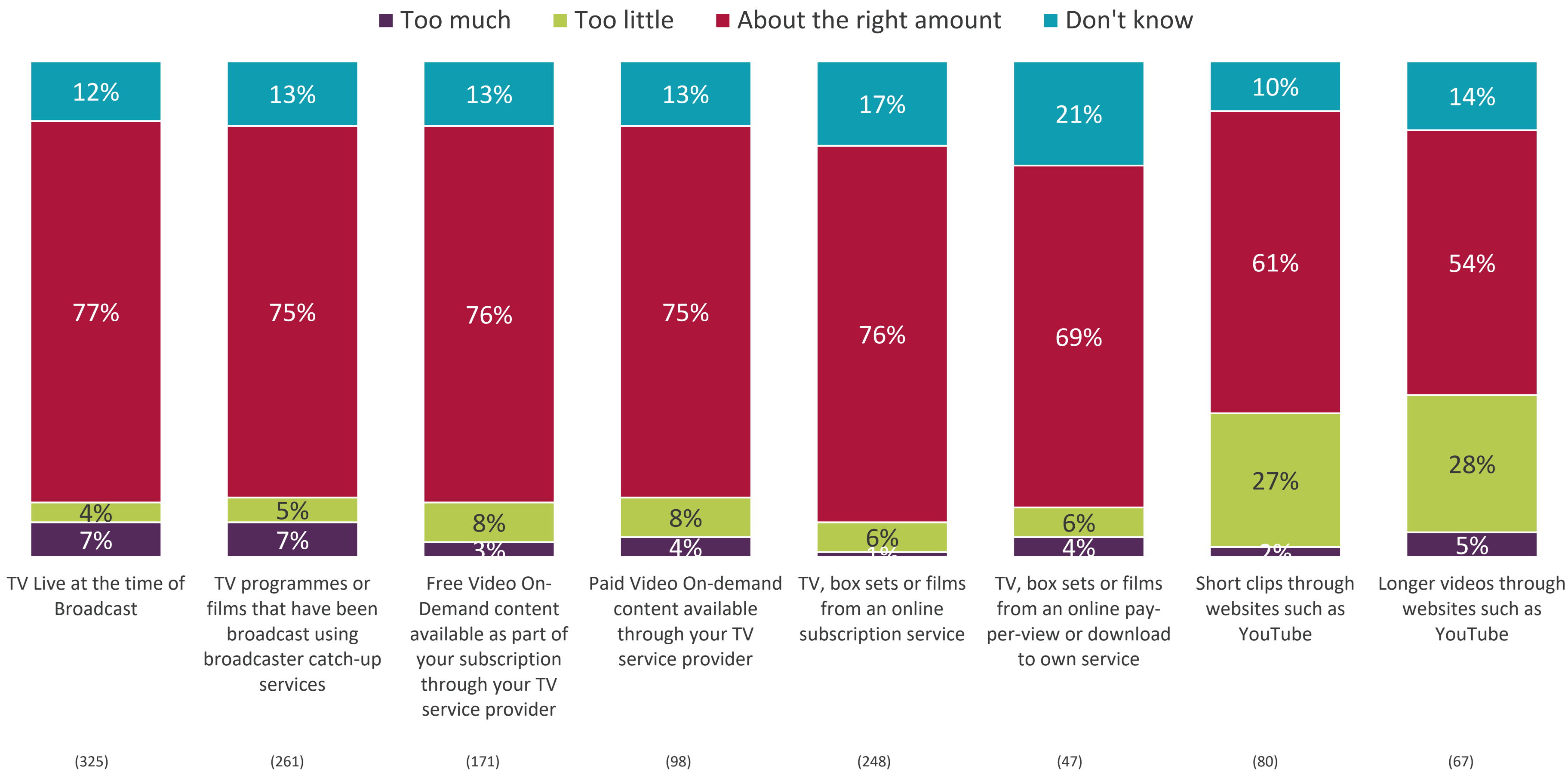
QM4 – Do you think the amount of regulation for each of the following is too much, too little or about the right amount?

Base: All who believe each on-demand/online service is regulated as indicated in chart.

Source: Cross Platform Media Tracker 2020

As seen with adults, the majority of **teens** think the amount of regulation is 'about right' across the various platforms and services but this is lower for video content on websites, such as YouTube, compared to linear broadcasting or catch up services, where a quarter of teens think there is 'too little' regulation

Opinions on current level of on-demand/online regulation: 2020



QM4 – Do you think the amount of regulation for each of the following is too much, too little or about the right amount?- All online and on-demand TV or video services

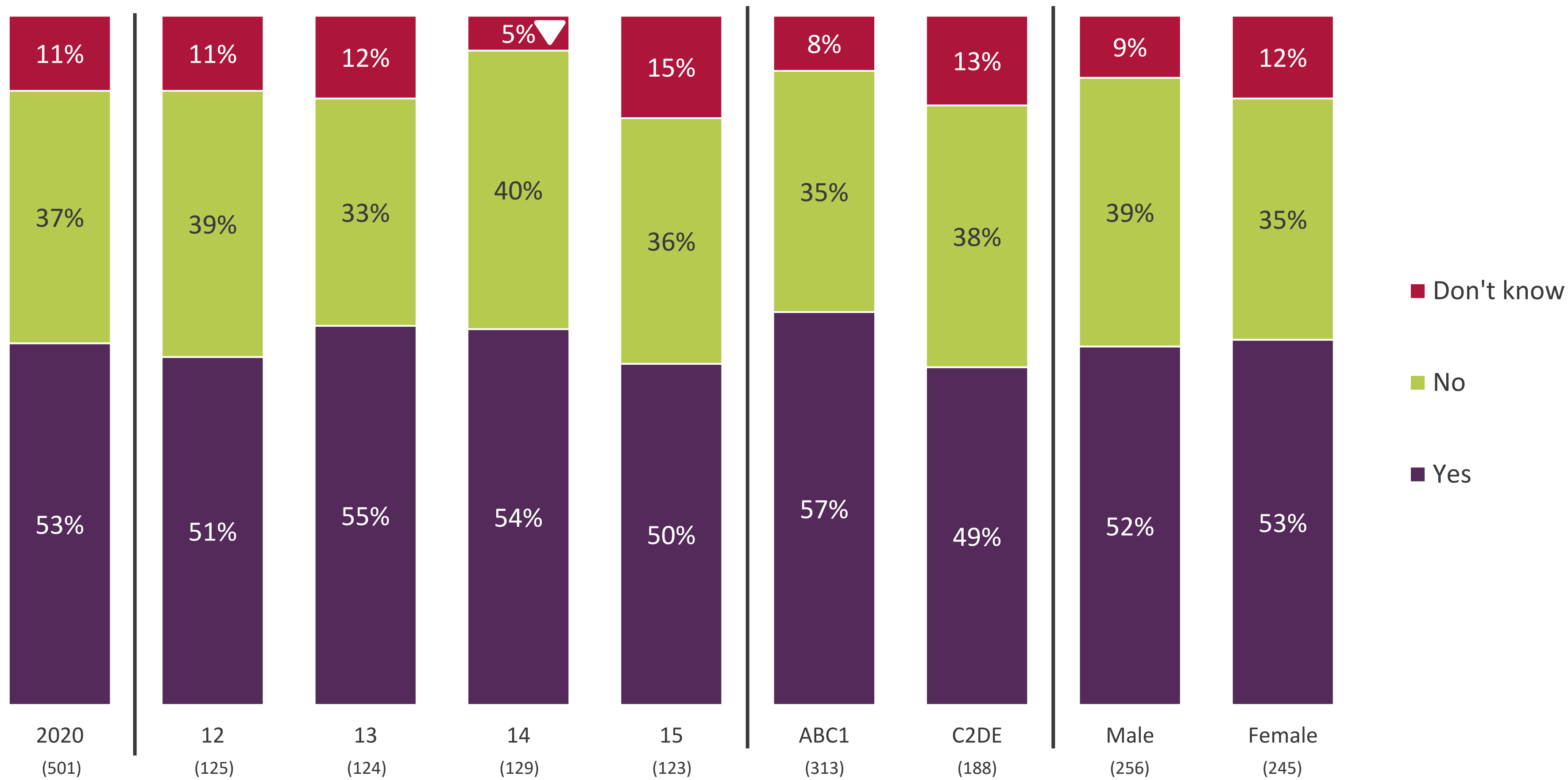
Base: All respondents as indicated in chart. (*LOW BASE SIZE <100 for some columns)

Source: Cross Platform Media Tracker 2020

Half of **teens** recall being asked their age to access on-demand/ online content

making communications work
for everyone

Recall of 'being asked for age' before accessing ODO content: 2020 sub-groups



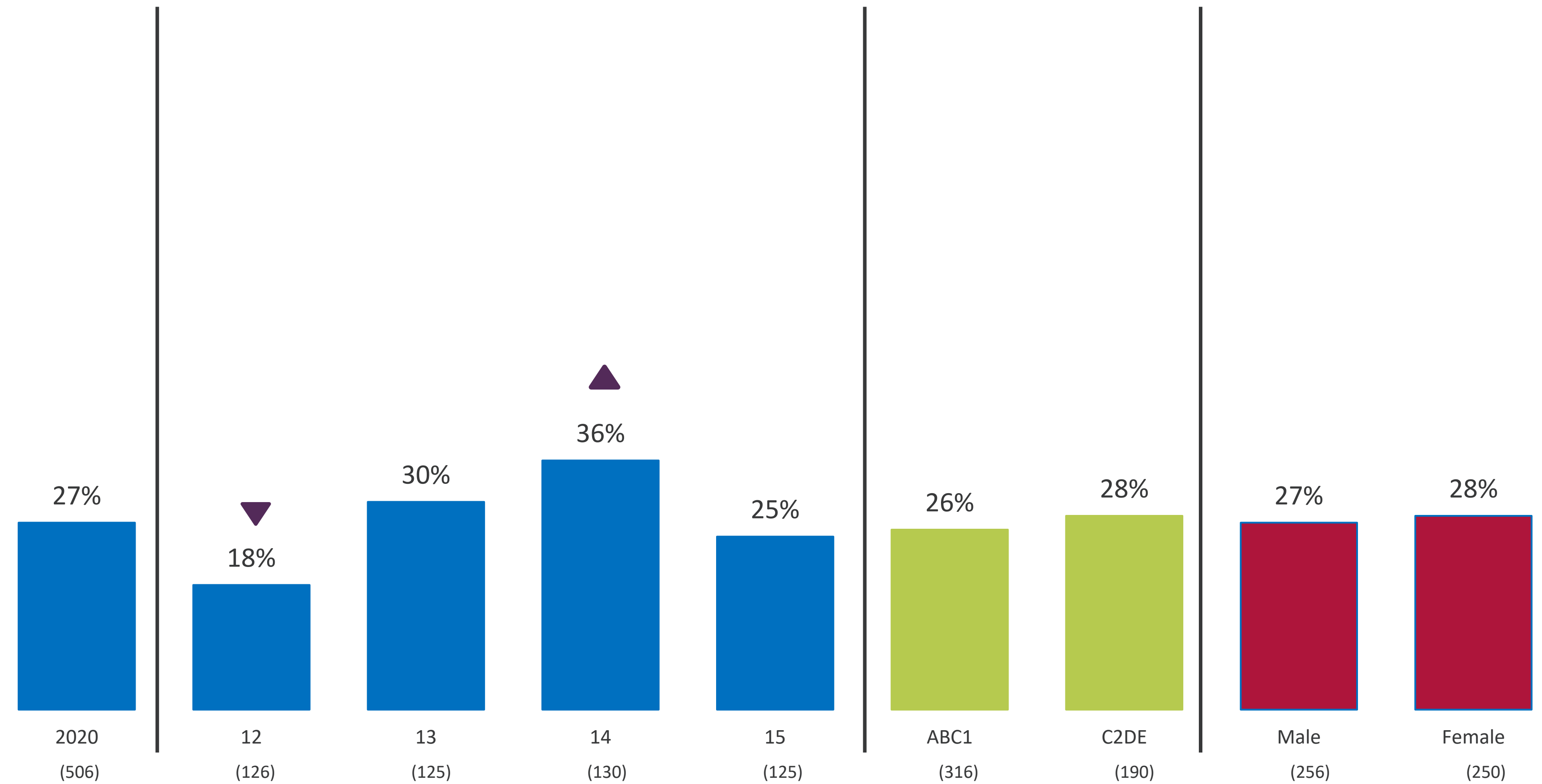
QM7 – When accessing online and on-demand TV or video content have you ever noticed being asked for your age before accessing content (e.g. by ticking a box to indicate you are over 16 or 18)?

Base: All respondents who have watched anything on-demand/online in the last 12 months as shown on chart. Prompted, single code. Significance testing shows any difference between any age group and all 12-15 year olds in 2020, between socio-economic groups and by gender in 2020.

Source: Cross Platform Media Tracker 2020

Over a quarter of **teens** say they ticked the box to indicate they were old enough to access content even though they were younger than required

Whether ticked 'Yes' age box even though underage



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?

Base: All respondents as indicated in chart. Significance testing shows any difference between any age group and all 12-15 year olds in 2020, between socio-economic groups and by gender in 2020.

Source: Cross Platform Media Tracker 2020

Cross Platform Media Tracker 2020
Audience Attitudes to Programme Standards

Produced by: BVA BDRC

Fieldwork: January-March & October-December 2020

Methodology: adults

Sample

- 2,474 adults aged 16+ in the UK
- Quotas set on gender, age, and socio-economic group using Census data for each Primary Sampling Unit (PSU) covered for CAPI interviewing; as well as on working status, household size, children in household, ethnicity, disability and urbanity for online. The telephone interviews specifically targeted the 13% of UK adults who are not online and aimed for a profile broadly representative of this group.

Data Collection

- Mixed method: 83% online / 11% CATI respondents / 6% CAPI face-to-face interviews
- Conducted by BVA BDRC
- Fieldwork conducted in Q1 and Q4 2020. Fieldwork paused from end of March through September due to the Covid-19 pandemic
- Changes in the interview method in 2008, 2014, 2017 and 2020 are shown with a dashed line

Data Reporting

- Weighted to be nationally representative of the UK, and an overall weight applied to re-balance the contribution of each methodology (further detail on following slide)
- Total 2020 data tested against 2018 data for any statistically significant differences ▲▼
- Sub-group data is from 2020 only – with measures for individual age groups tested against the total adults measure
- Testing also conducted between socio-economic groups (ABC1/C2DE), by gender and between parents and non-parents

2020 adults weighting

As a result of the change in approach in 2020 involving different proportions of the existing methodologies and the introduction of a new methodology, analysis was conducted to assess how best to combine and weight the data from the three methods to best provide consistency with the normal approach and thus allow trends to be tracked. A re-balancing of the contribution by method of 67% for online, 10% for CATI respondents and 23% CAPI face-to-face.

These proportions were determined on the principle of adjusting the contributions to be as close to the 50:50 online versus non-online methodology as collected historically as possible, while maintaining an acceptable weighting efficiency, on the basis that this best approximates the historic and anticipated future approach, thus retaining as much ability to track year-to-year while limiting the impact on the robustness of the data.

Methodology: children aged 12-15

Sample
- 506 children aged 12-15 in the UK
- Quotas set on gender, age and SEG

Data Collection
- Online interviews
- Conducted by BVA BDRC
- Fieldwork conducted in Q1 and Q4 2020. Fieldwork paused from end of March through September due to the Covid-19 pandemic

Data Reporting
- Weighted to be nationally representative of 12-15 year olds in the UK
- 2020 data tested against 2018 data where available for any statistically significant differences ▲▼
- Sub-group data is from 2020 only – with measures for individual age groups tested against the total 12-15 year olds measure
- Testing also conducted between socio-economic groups and gender
- Significance testing applied at the 95% confidence level