



On-demand and online research: consumption and concerns

Research Document

Publication date:

January 2016

About this document

In this report we examine online and on-demand consumption of audio-visual content among adults and teens, and their concerns regarding that content.

This report provides an update to some of the core metrics contained in our 2014 *Attitudes to online and on demand content* report¹. It is intended to be 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.

1

http://stakeholders.ofcom.org.uk/binaries/internet/Attitudes_to_Online_and_On_Demand_Content_report_2014_report.pdf

Table of Contents

1	Executive summary	3
1.1	Overview of research background and method	3
1.2	Summary of key findings	3
2	Background, objectives and method	6
2.1	Background	6
2.2	Research objectives and method	7
3	On-demand and online consumption	9
3.1	On-demand and online use among all UK adults	9
3.2	Frequency of viewing ODO services, among ODO users	11
4	Concern regarding on-demand and online content	14
4.1	Level of concerns	14
4.2	Types of concern	15
5	Annex A: Adult questionnaire	18
6	Annex B: Teen questionnaire	24

Section 1

Executive summary

1.1 Overview of research background and method

Ofcom has a number of duties in relation to online audio-visual 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 audio-visual services, and in particular the need to protect children.

Ofcom seeks to understand people's use of, and concerns about, notified ODPS in the broader context of *all* on-demand and online audio-visual services in the UK², and has therefore carried out quantitative consumer research for this purpose. A similar survey was conducted in 2014. Comparisons are made to the 2014 data throughout this report where relevant.

The survey covers the full range of audio-visual 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.

The main survey involved interviews with a representative sample of 2,121 adults, of whom 1,453 were users of on-demand and online services. This was supplemented with an additional sample of 500 teenagers (aged 12-15).

1.2 Summary of key findings

Three-quarters (74%) of UK adults have 'ever' viewed an on-demand or online service in the past 12 months

There is a strong correlation between usage levels and age, with the highest usage levels observed among younger age groups. Use is almost universal among 16-24 year olds (96%), whereas only one in three adults aged 65+ (35%) use these services.

² Questions regarding people's understanding of, and attitudes towards, the regulation of audio-visual content viewed online, detailed in the 2014 report², were not included in this year's survey.

Males, ABC1 socio-economic groups and parents are all significantly more likely than other sub-groups to have viewed on-demand and online content.

Use has significantly increased since 2014 (from 71% to 74%) among all adults.

TV catch-up services are the most commonly-viewed services, followed by social networking sites and YouTube

TV catch-up services are watched by six in ten of all UK adults (57%). Short-form content posted on social networking sites (51%) and YouTube (45%) are the next most commonly-viewed types of content, viewed by around half of all UK adults.

While TV catch-up services are viewed by greater numbers of people, content posted on social networking sites and YouTube are viewed with greater levels of frequency

When looking at viewing frequency among *all on-demand and online (ODO) users*, content posted on social networking sites is viewed with greater levels of frequency. One in three (30%) ODO users claim to watch content on these sites every day. Six in ten (57%) ODO users view content on social network sites at least once a week. This compares to 52% who view TV catch-up services, and 39% who view YouTube videos posted by friends, family and other users at least once a week.

With the exception of TV catch-up services, use of all on-demand and online services is higher among younger age groups, and declines with age

Viewing of ODO services among the over-55s is driven by their use of TV catch-up services; the majority (80%) of this age group use these services. The next most commonly-viewed content among this older age group is free video-on-demand (VoD) content via TV subscription services, viewed by a quarter (24%). Use of long-form services is relatively low by comparison (16% use online rental, 15% use paid-for VoD and/or paid-for content from online stores).

The frequency of using on-demand and online services among teens is closely aligned with the 16-24 age group, although teens use TV catch-up services, and free and paid-for VoD content via TV subscription services, slightly more.

The proportion of UK adults claiming to have seen something of concern on an online or on-demand service remains stable at just over one in ten (12%)

There are higher levels of concern among the younger age groups. The level of concern among *all* adults is relatively low.

However, there has been a significant increase in concern among teenagers: a quarter of teens (28%) who view online content expressed concern in 2015

Over a quarter of teens (28%) have been concerned by content they have seen on demand or online. This represents a significant increase since 2014, when the level of concern was 16%.

Concerns regarding violence, bullying and racism have increased among adult online users since 2014

The top mentions in 2015 among all 'concerned' adults include: violence (50%), welfare of children/young people (32%), bullying/victimising (31%), racism (30%), discrimination (29%), bad language (28%), and pornography (24%). Concerns regarding violence, bullying and racism have increased significantly since 2014, while concerns about sexually explicit content have decreased.

Bullying/victimisation is now one of the top concerns for parents regarding online content, and sits alongside violence and the welfare of children/young people

The top concerns for parents in 2015 include violence (54%), the welfare of children/young people (36%) and bullying/victimisation (37%). Bullying/victimisation is now in the top three concerns, up from sixth position (20%) in 2014. This represents a statistically significant increase and mirrors the increase in concern over bullying seen among teenagers.

These concerns largely reflect the same concerns people have regarding broadcast content: bad language (44%), exposure to violent content (41%), sexually explicit material (41%), and discrimination (23%). However, bullying is a specific online concern that appears to be on the increase.

Section 2

Background, objectives and method

2.1 Background

Ofcom has a long-standing remit regarding licensed broadcast television: TV and radio services that are licensed by Ofcom are regulated under the **Ofcom Broadcasting Code**.

Ofcom also regulates on demand programme services (ODPS) that provide 'TV-like' content within UK jurisdiction. On 1 January 2016 the regulation of ODPS was brought fully within Ofcom to sit alongside its regulation of broadcast content, following a period of co-regulation with the Authority for Television on Demand (ATVOD)³.

Ofcom does not regulate any other online audio-visual content.

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 audio-visual services, and in particular the need to protect children. Therefore, Ofcom seeks to understand people's use of, and concerns towards, notified ODPS in the broader context of *all* on-demand and online audio-visual services in the UK, and has carried out quantitative consumer research for this purpose. A similar survey was conducted in 2014 that contained additional questions on attitudes towards regulation. Comparisons are made to the 2014 data throughout this report where relevant.

As noted above, the scope of this survey covers the full range of audio-visual 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- and short-form audio-visual content.

³Ofcom designated the Authority for Television On Demand (ATVOD) in 2010 as a co-regulator to take the lead in regulating editorial content for video-on-demand services. Following a review of the co-regulatory arrangements for video-on-demand services in 2015, Ofcom became the sole regulator of these services.

2.2 Research objectives and method

The 2015 survey focuses on people's use of audio-visual content across a range of categories, and their corresponding concerns about online content standards. Questions regarding people's understanding of, and attitudes towards, regulation of audio-visual content viewed online, detailed in the 2014 report⁴, were not included in this year's survey. Comparisons are made to the 2014 data where relevant.

The main survey was conducted via a face-to-face omnibus among 2,121 adults aged 16+. Respondents were screened to ensure that they viewed at least one of the range of relevant on-demand and online content types. The sample size of on-demand and online users was 1,453.

An additional online survey of 500 interviews was carried out among 12-15 year olds (referred to as 'teens' throughout this report). The teen survey used a simplified, shorter version of the main questionnaire used the previous year.

Research note on methodology:

Adults' survey: While there was a change in methodology for the adults' survey between 2014 and 2015, from an online survey to a face-to-face omnibus, the 2014 online results were calibrated to a face-to-face omnibus survey carried out in 2014, mitigating the impact of methodological differences when comparing 2014 and 2015 results.

Teens' survey: The teens' survey was carried out using the same methodology as in 2014.

Statistical differences:

Where significant differences have been noted, these are at the 95% confidence level. This means that we can be confident that, 19 times out of 20, the difference is not simply due to chance.

4

http://stakeholders.ofcom.org.uk/binaries/internet/Attitudes_to_Online_and_On_Demand_Content_report_2014_report.pdf

Full list of on-demand and online services

The report covers the full range of services that deliver on-demand and online content⁵. Throughout the report, we generally refer to each of these services using the simplified descriptions below.

<u>Full service description</u>	<u>Simplified description</u>	
TV catch-up services (e.g. BBC iPlayer, ITV Player, All 4, Demand 5, Now TV)	TV catch-up	<ul style="list-style-type: none"> • Most 'TV-like' • Predominantly long-form • Regulated
Free video-on-demand content available through a subscription service provider (e.g. Virgin Media/Sky Go)	Free VoD from TV provider	
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)	Paid VoD from TV provider	
Online video rental services downloaded or streamed (e.g. Blinkbox, Amazon Prime Instant Video, Netflix)	Online video rental	
Video content that is paid for on digital or online stores (e.g. iTunes Store, Google Play)	Paid content from online stores	
Other TV or video channels available online (e.g. southparkstudios.co.uk, Vevo.com)	Miscellaneous/other online TV/video channels	<ul style="list-style-type: none"> • Least 'TV-like' • Predominantly short-form • Unregulated
Official YouTube channels from familiar brands/organisations (e.g. 4oD, BBC Worldwide, Jamie Oliver's Food Tube, Top Gear)	Official YouTube	
Video content on news websites (e.g. the Sun/the Guardian/the Huffington Post/www.bloomberg.tv)	News website video	
YouTube videos uploaded by friends, family or other YouTube users (i.e. non-professional)	Non-professional YouTube	
Video content posted on social networking sites other than YouTube (e.g. Facebook, Twitter, blogs, Vimeo)	Non-YouTube social networking site	

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

Section 3

On-demand and online consumption

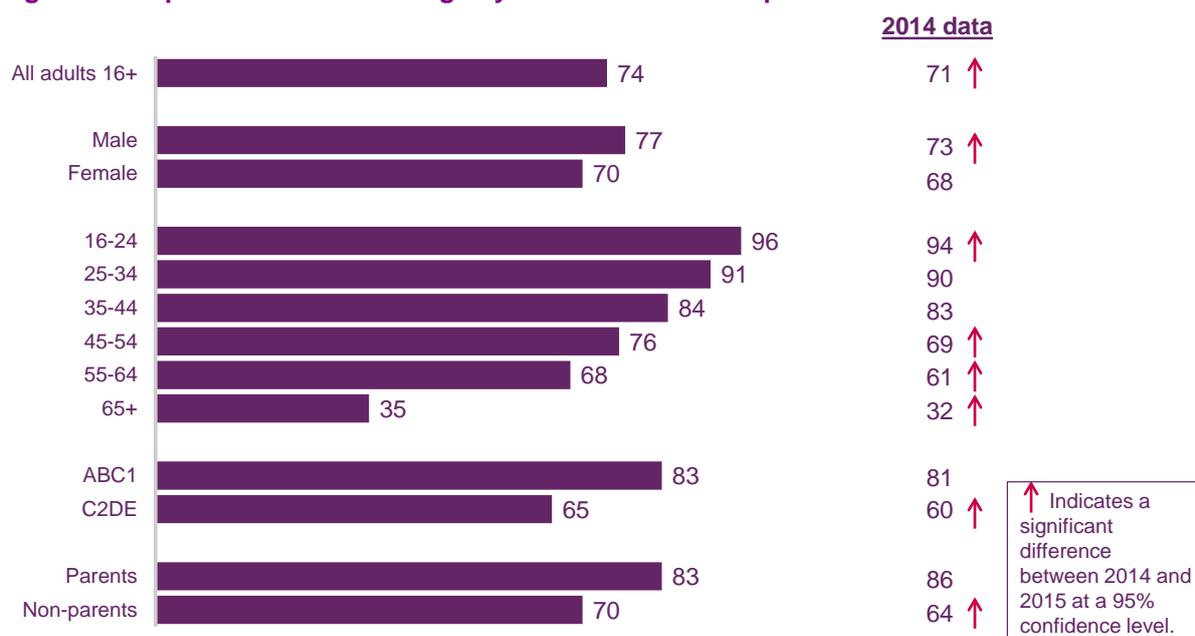
3.1 On-demand and online use among all UK adults

On-demand and online content is widely viewed across the UK: three-quarters (74%) of UK adults have viewed an on-demand or online service in the past 12 months

There is a strong correlation between usage levels and age: the highest usage levels are seen among younger age groups. Use is almost universal among 16-24 year olds (96%) whereas only one in three adults aged 65+ (35%) use these services.

Males, ABC1 socio-economic groups, and parents are all significantly more likely than other sub-groups to have viewed on-demand and online content.

Figure 1: Proportion of adults using any ODO service in the past 12 months



Source: BDRC face-to-face omnibus September 2015 Q4. Looking at the following services, please could you say how often you typically watch each of these?

Base: All UK adults 16+ (2074)/(2121), male (1001)/(1024), female (1073)/(1097), 16-24 (265)/(299), 25-34 (367)/(322), 35-44 (296)/(293), 45-54 (304)/(309), 55-64 (280)/(302), 65+ (562)/(596), ABC1 (884)/(897), C2DE (1190)/(1224), parents (594)/(556), non-parents (1480)/(1565).

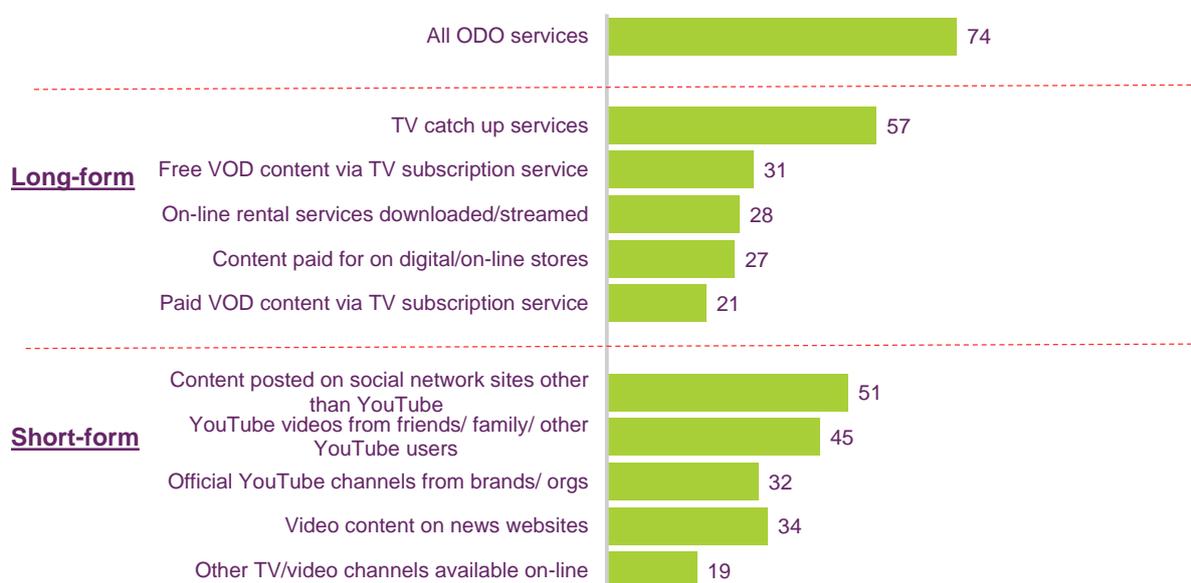
Comparing the 2015 data to 2014, use has increased (from 71% to 74%) among all adults. There has been a significant increase among males (73% to 77%), younger adults aged 16-24 (94% to 96%), and in particular, older age groups (69% to 76% among

45-54s, 61% to 68% among 55-64s, 32% to 35% among over-65s); people in socio-economic group C2DE (60% to 65%); and non-parents (64% to 70%).

TV catch-up services are the most commonly-viewed services, watched by six in ten UK adults (57%). Short-form content posted on social networking sites, and YouTube content posted by friends, family and other users, are also viewed by around half of all UK adults (51% and 45% respectively).

TV catch-up services are the type of long-form service most commonly viewed by all UK adults, watched by just under six in ten adults (57%) in the past 12 months. Content posted on social networking sites (51%) and content posted on YouTube (45%) are the next most commonly-viewed types of content.

Figure 2: Proportion of adults using any ODO service in the past 12 months



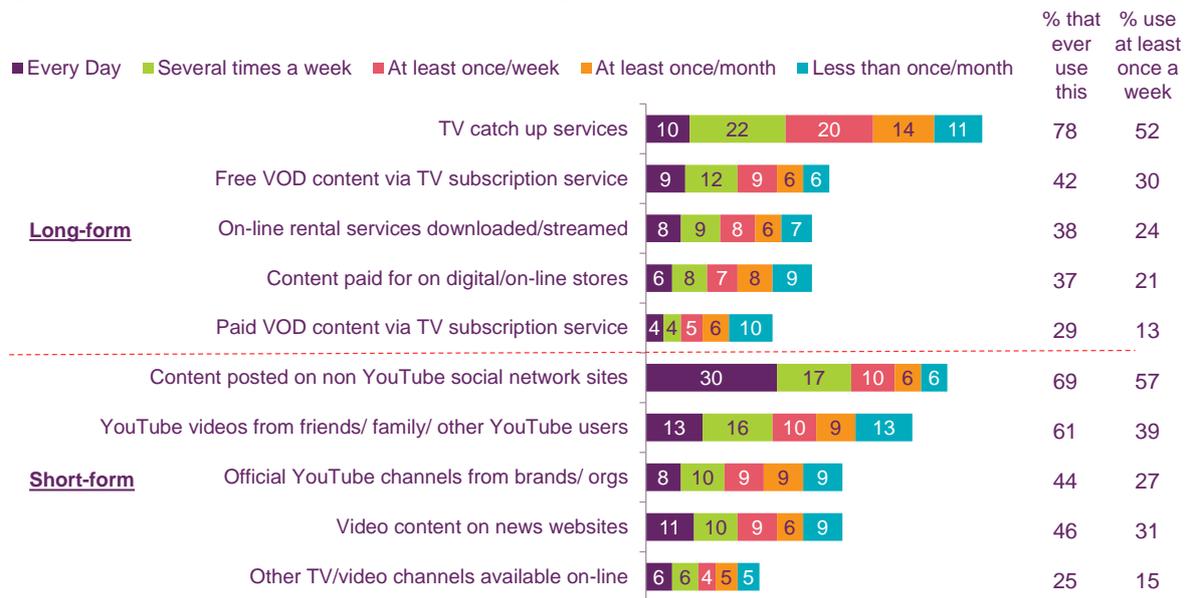
Source: BDRC face-to-face omnibus September 2015. Q4 Looking at the following services, please could you say how often you typically watch each of these?
Base: All UK adults 16+ (2121).

3.2 Frequency of viewing ODO services, among ODO users

While TV catch-up services are viewed by greater numbers of people, content on social networking sites and YouTube is viewed more frequently.

Looking at viewing frequency among all ODO users, although TV catch-up services are used by a larger proportion of people (78% of on-demand and online users aged 16+ have ever used these services), content posted on social networking sites is viewed more often. One in three (30%) ODO users claim to watch content on these sites every day, while six in ten (57%) ODO users view content on social network sites at least once a week. This compares to 52% viewing TV catch-up services, and 39% viewing YouTube videos posted by friends, family and other users at least once a week.

Figure 3: Frequency of use of services among all on-demand and online users



Source: BDRC F2F omnibus, September 2015 Q4. Looking at the following services, please could you say how often you typically watch each of these?

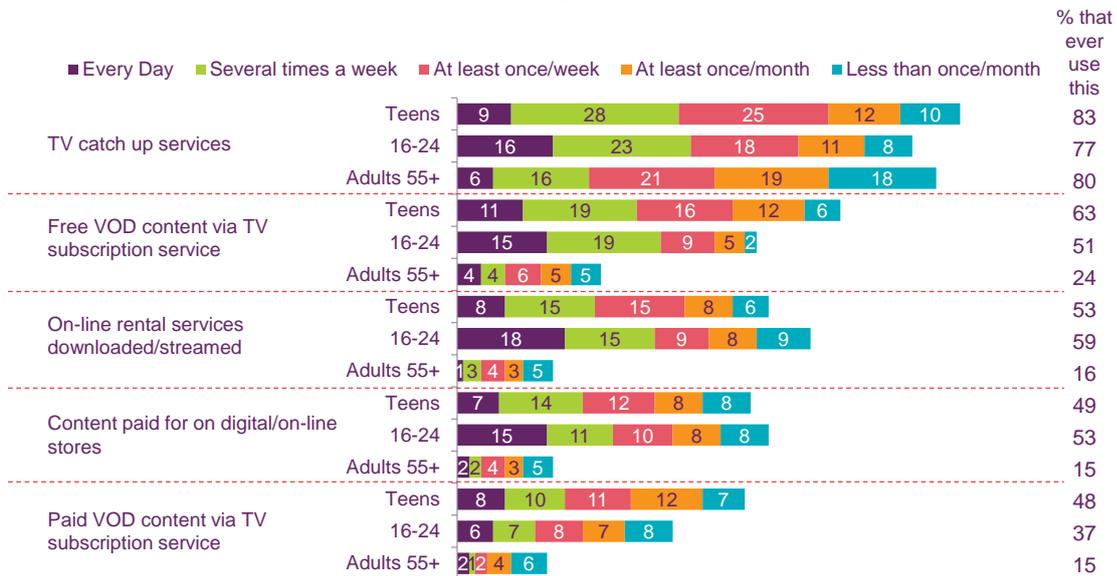
Base: All on-demand and online users: all adults 16+ (1453)

With the exception of TV catch-up services, use of all on-demand and online services is higher among younger groups, and declines with age.

Viewing of ODO services among the over-55s is driven by use of TV catch-up services; a majority (80%) of this age group use these services. The next most commonly-viewed content among this age group is free VoD content via TV subscription services, viewed by a quarter (24%). Use of long-form services is relatively low by comparison (16% use online rental, 15% use paid-for VoD and/or paid-for content from online stores).

Teens' frequency of using on-demand and online services is closely aligned with the 16-24 age group, although teens use TV catch-up services, and free and paid-for VoD content via TV subscription services, slightly more.

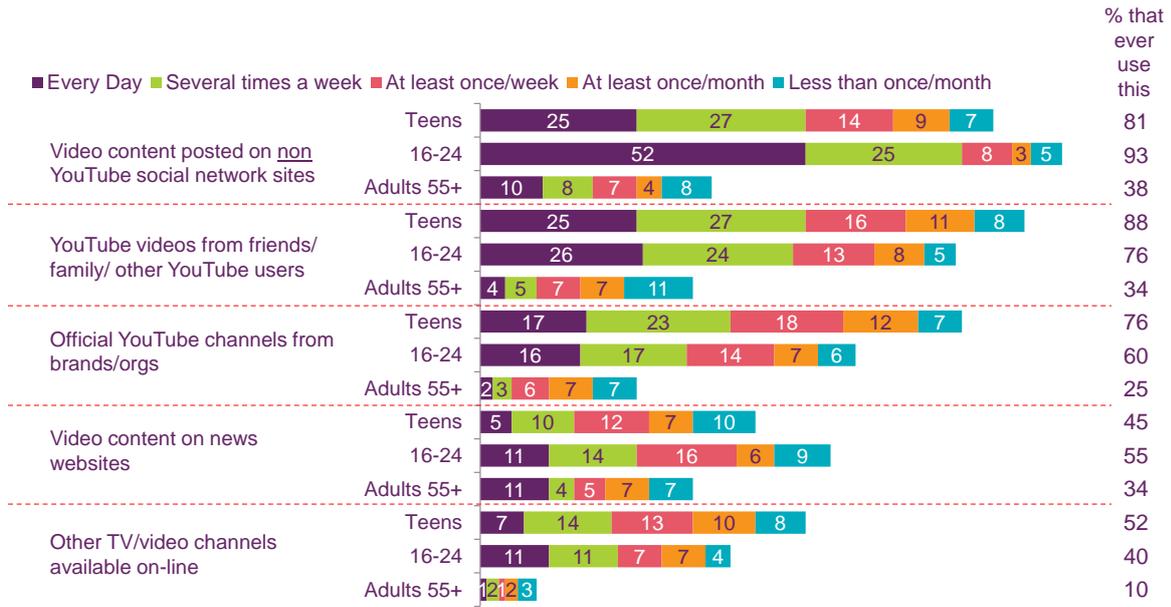
Figure 4: Frequency of use of services: long-form services



Source: BDRG F2F omnibus September 2015 Q4. 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+ (1453), 16-24 (285), teens (500)

For short-form viewing, teens and young adults aged 16-24 are significantly more likely than older adults to 'ever use' each service. Young adults (aged 16-24) do, however, view video content posted on social networking sites with significantly higher frequency than teens.

Figure 5: Frequency of use of services: short-form services



Source: BDRC F2F omnibus September 2015 Q4. 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+ (1453), 16-24 (285), teens (500)

Section 4

Concern regarding on-demand and online content

4.1 Level of concerns

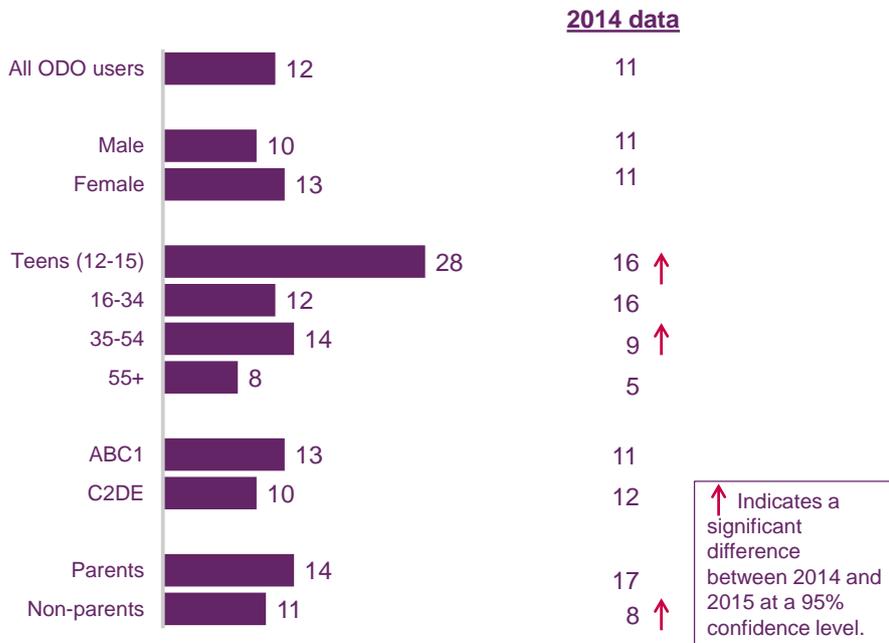
The proportion of UK adults claiming to have seen something of concern on an online or on-demand service remains stable at just over one in ten (12%)

Overall, one in eight (12%) of on-demand and online users have seen something of concern on an on-demand or online service. The level of concern has remained stable (12% in 2015 compared to 11% in 2014). The incidence of seeing something of concern correlates with age; higher levels of concern are seen among the younger age groups.

However, there has been a significant increase in concern among teenagers: a quarter of teens (28%) who view online content express concern.

Over a quarter of teens (28%) have been concerned by content they have seen on demand or online. This represents a significant increase since 2014 (when the level of concern was 16%).

Figure 6: Percentage seeing something of concern on an on-demand or online service



Source: BDRC F2F omnibus September 2015

Q7. Has anything that you have seen on any online or on-demand service caused you any concern?

Base: All on-demand and online adult users: online 2014 (2678), F2F omnibus 2015 (1453); on-demand and online teen users 2014 (500), 2015 (500)

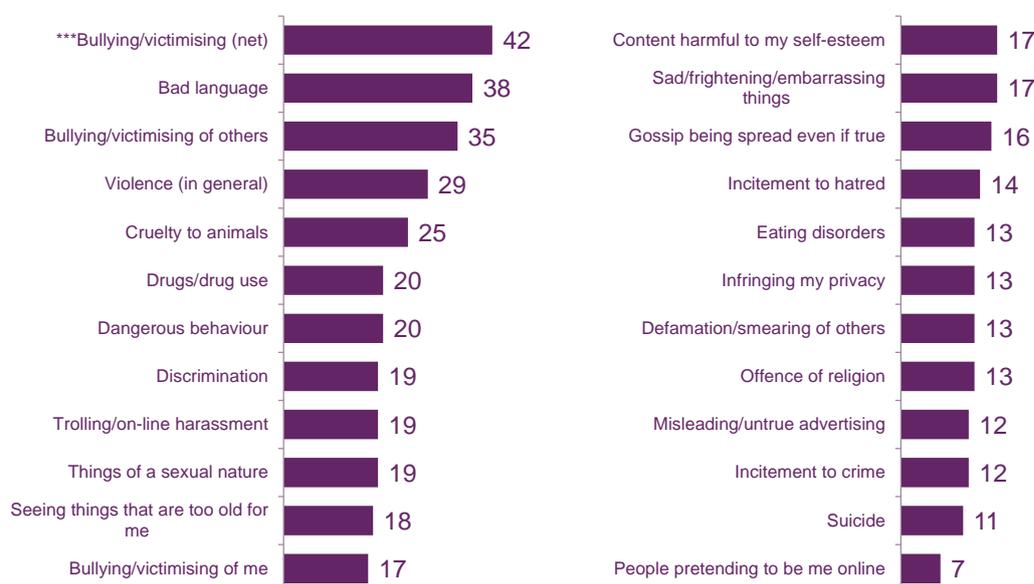
4.2 Types of concern

Online bullying is a top concern among teenagers

Among the 28% of teenagers who had seen something of concern, the top concerns were bullying/victimisation⁶ (42%), bad language (38%), violence (29%) and cruelty to animals (25%). Although small base sizes mean that differences are not statistically significant, mentions of bullying have increased from 37% in 2014 to 42% in 2015.

There were also concerns specific to non-broadcast content, albeit at quite low levels. These included “gossip being spread even if it’s not true” (16%), incitement to hatred (14%), eating disorders (13%) and suicide (11%).

Figure 7: Types of concern among those reporting concern: teens



Source: BDRC F2F omnibus September 2015. Q13. What kind of thing caused you concern on the online or on-demand TV or video content you saw?

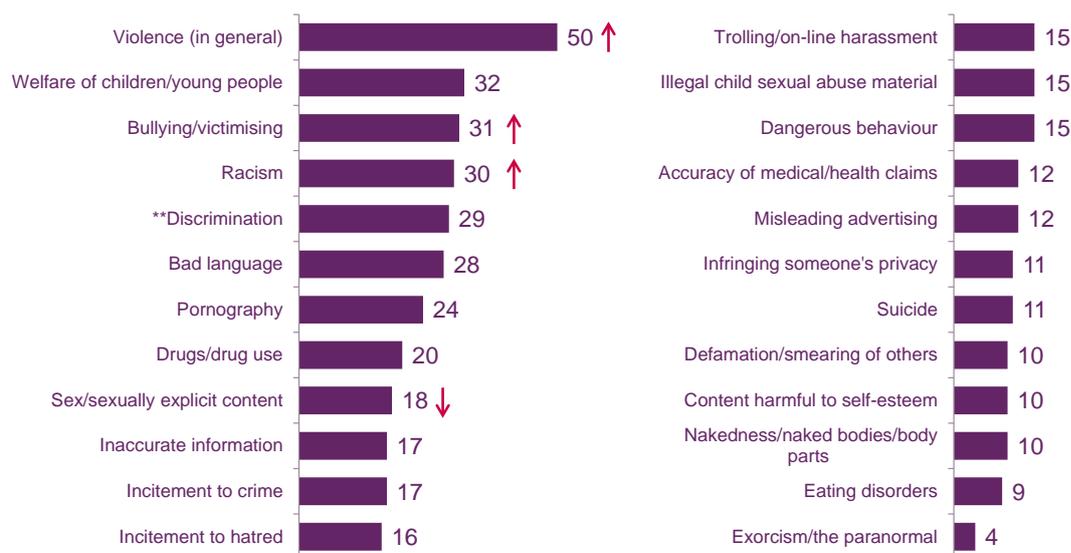
Base: All on-demand and online users seeing something of concern: teens (85*)/(151) *Effective base size <100

Concerns regarding violence, bullying and racism have increased among adult online users since 2014

The top mentions in 2015 among all ‘concerned’ adults include: violence (50%), welfare of children/young people (32%), bullying/victimising (31%), racism (30%), discrimination (29%), bad language (28%) and pornography (24%). Concerns regarding violence, bullying and racism have significantly increased among adults since 2014, while concerns regarding sexually explicit content have decreased.

⁶ Combined code for ‘bullying of others’ and ‘bullying of me’.

Figure 8: Top types of concern among those reporting concern: adults



Source: BDRC F2F omnibus September 2015. 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+ (166)

↑ Indicates a significant difference between 2014 and 2015 at a 95% confidence level.

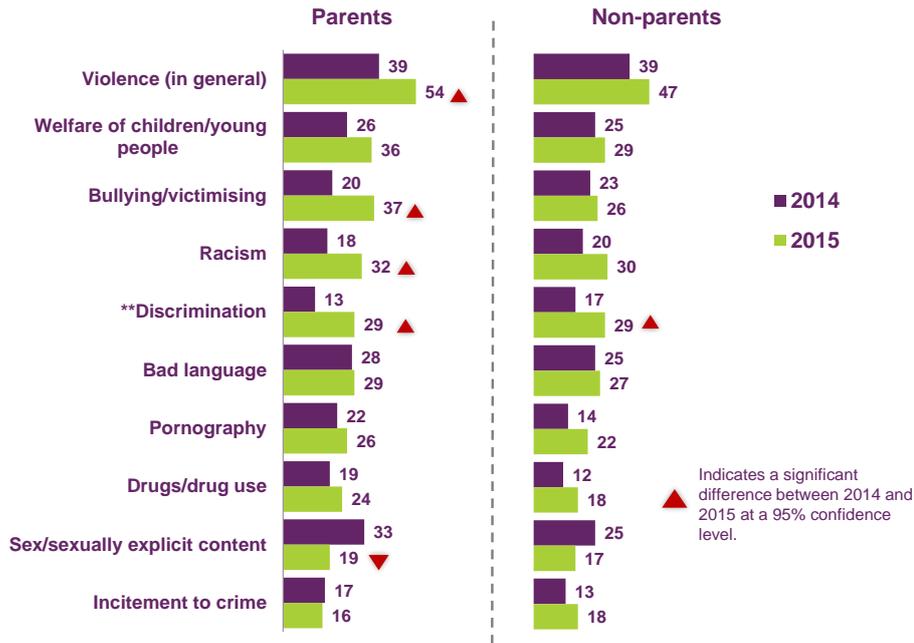
Bullying/victimisation is now one of the top concerns for parents regarding online content, alongside violence and the welfare of children/young people

When analysing the 2015 data from parents and non-parents, the concerns cited are similar between the two groups, although the strength of opinion is stronger, with more mentions across the board, among parents.

The top concerns for parents in 2015 include violence (54%), the welfare of children/young people (36%) and bullying/victimisation (37%). Bullying/victimisation is now in the top three concerns, up from sixth position (20%) in 2014. This represents a statistically significant increase and mirrors the increase in concern over bullying seen among teenagers.

There have also been significant rises in levels of concern regarding violence (up from 39% to 54%), and racism (up from 18% to 32%) among parents since 2014. Concerns among parents regarding sexually explicit content have fallen from 33% in 2014 to 19% in 2015.

Figure 9: Top ten concerns among those reporting concern: parents vs. non-parents



Source: On-demand and online tracker 2014 / 2015

Base: All on-demand and online users seeing something of concern: parents (256/63*), non-parents (215/103)
Q13. What kind of thing caused you concern on the online or on-demand TV or video content you saw?

These concerns largely reflect the same concerns that people have regarding broadcast content: bad language (44%), exposure to violent content (41%), sexually explicit material (41%), and discrimination (23%). However, bullying is a specific online concern that appears to be on the increase.

Section 5

Annex A: Adult questionnaire

INTRODUCTION:

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

The survey should take about 3-5 minutes.

Q2-Q6 COLLECTED AS PART OF THE OMNIBUS.

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
	(14)
South East.....	0
London	1
Northern Ireland	2

Q3 Are you...?

Male.....	1
Female	2

Q4 How old are you?

Please type in number: _____

SCRIPTER: PLEASE CODE TO THE FOLLOWING BANDS

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

Q4a 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 DO NOT ASK

SCRIPTER: CODE SIZE OF HOUSEHOLD FROM Q4b. SINGLE CODE

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

Q4c ASK ALL

Are you the parent or guardian of any children under 18? Please select one.
SINGLE CODE

Yes 1
 No..... 2

Q4d 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

- 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
-

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, All 4, 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., BBC Worldwide, Jamie Oliver's Food Tube, Top Gear etc.)	1	2	3	4	5	6	7
Other TV or video channels available on-line (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 on-line 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

Now we'd like to ask you some questions about your views on the on-line 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 on-line 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 **on-line or on-demand TV or video content** (e.g. TV programmes, films, video clips, video podcasts or anything else you watch on-line or on-demand, you watch nowadays) has anything that you have seen on any on-line 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.

Yes 1
 No 2
 Don't know 3

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 on-line or on-demand service. What kind of thing caused you concern on the **on-line or on-demand TV or video content** (e.g. TV programmes, films, video clips, video podcasts or anything else you watch on-line 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 etc.)	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/on-line 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

Q13B ASK ALL WHO HAVE SEEN SOMETHING OF CONCERN ON ANY ON-LINE OR ON-DEMAND SERVICE (CODE 1) AT Q12
 Now still thinking about the content that caused concern on the **on-line or on-demand TV or video content** (e.g. TV programmes, films, video clips, video podcasts or anything else you watch on-line 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 LIST FROM Q13 1
 I did not find any of these offensive..... 2

Q13C ASK ALL WHO HAVE SEEN SOMETHING OF CONCERN ON ANY ON-LINE OR ON-DEMAND SERVICE (CODE 1) AT Q12
 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 LIST FROM Q13 1
 None of them 2

Annex B: Teen questionnaire

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 3-5 minutes.

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 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

_____ (IF 1 CLOSE)

Q4b 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 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

- 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

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
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 Talk Talk TV (or similar)	7	7
YouView	8	8
Access TV content on-line 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

- 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

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 121 =
- CLOSE**
- 12.....2
- 13.....3
- 14.....4
- 15.....5
- Over 15.....6 =
- CLOSE**

Q6C And are you a...?

SINGLE CHOICE

- Boy.....1
 - Girl.....2
-

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, All 4, 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. All 4, BBC Worldwide, Jamie Oliver's Food Tube, Top Gear etc.)	1	2	3	4	5	6	7
Other TV or video channels available on-line (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 on-line 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

Now we'd like to ask you some questions about your views on the on-line 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 on-line 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 **on-line 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 on-line or on-demand>> you watch nowadays, has anything that you have seen on any on-line 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

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 on-line or on-demand service. What kind of thing caused you concern on the **on-line 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 on-line 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/on-line 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

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

Yes 1
 No..... 2