



ON-LINE MEDIA REGULATION RESEARCH FINDINGS

June 2011



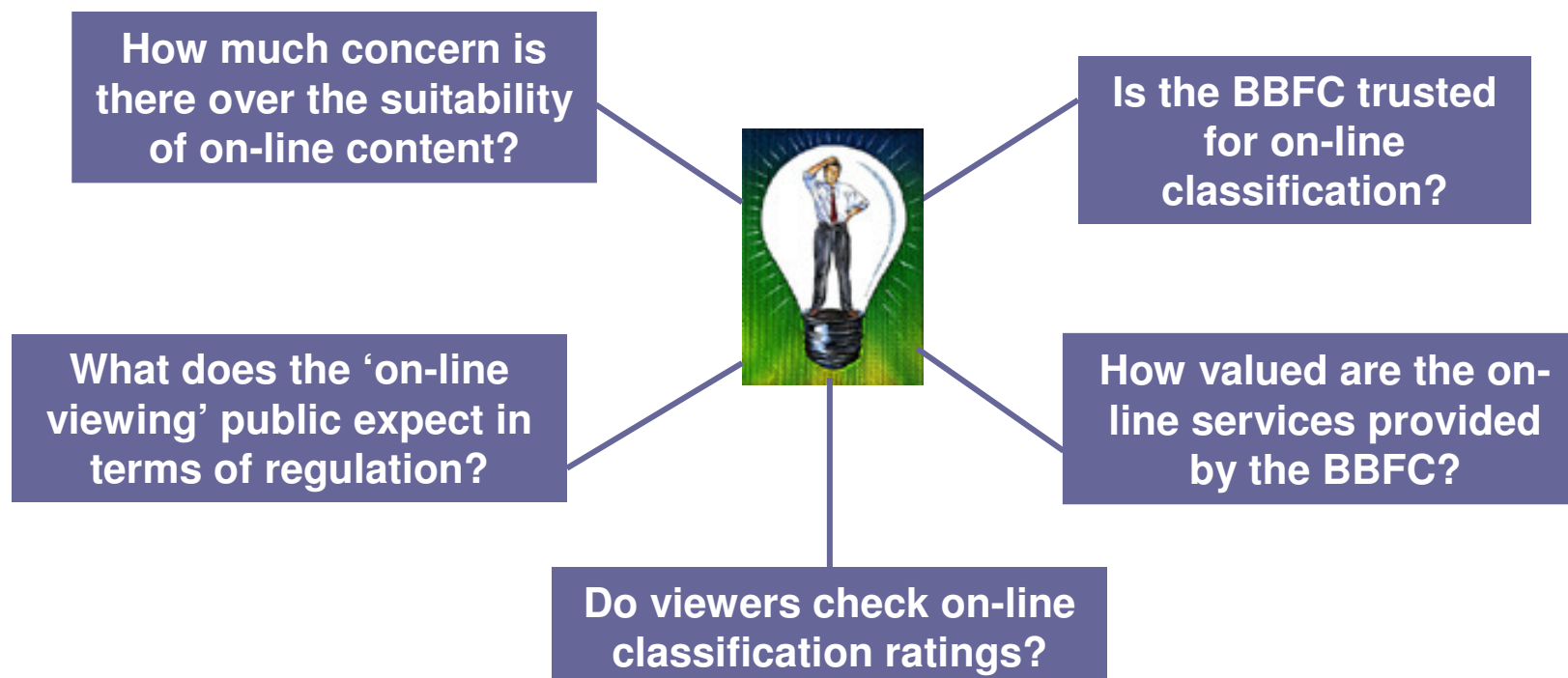
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Research Objectives

- To understand if and how the demand for content classification will change as the level of on-line viewing increases



Key findings

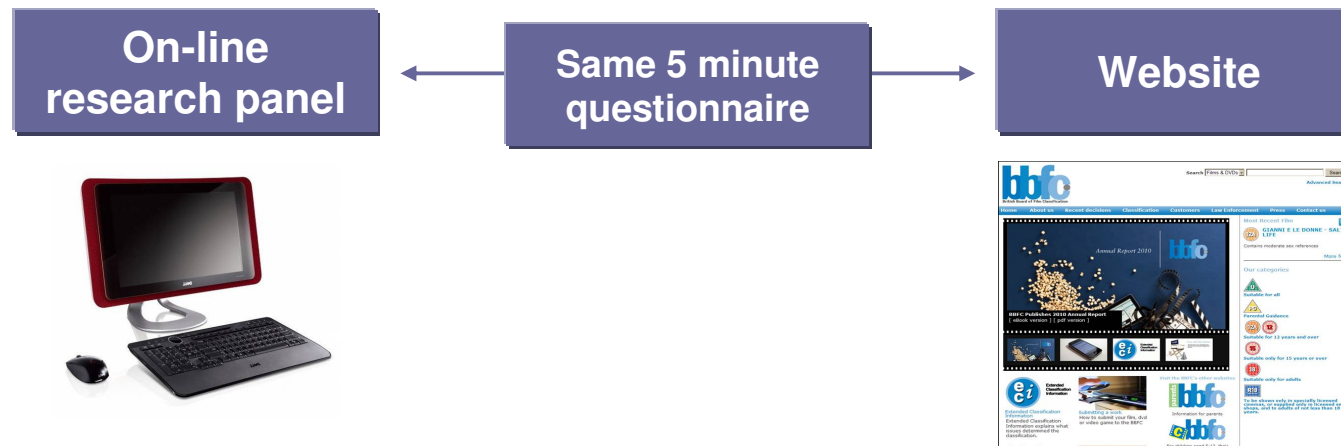
1. As more viewing takes place on the internet, there is an expectation that the same level of regulation will apply on-line as currently applies off-line
2. Most parents (89%) are now checking classifications on films they/their children download, even though this is not always easy to do
3. The provision of classifications does affect willingness to view, particularly where children are concerned – 66% say they prefer to download films that are classified
4. The BBFC is the trusted source for on-line film classifications





THE SURVEY

Two sources of data



Selection for interview = UK adults aged 16+ who have watched a film ('off' or 'on'-line) in the past month

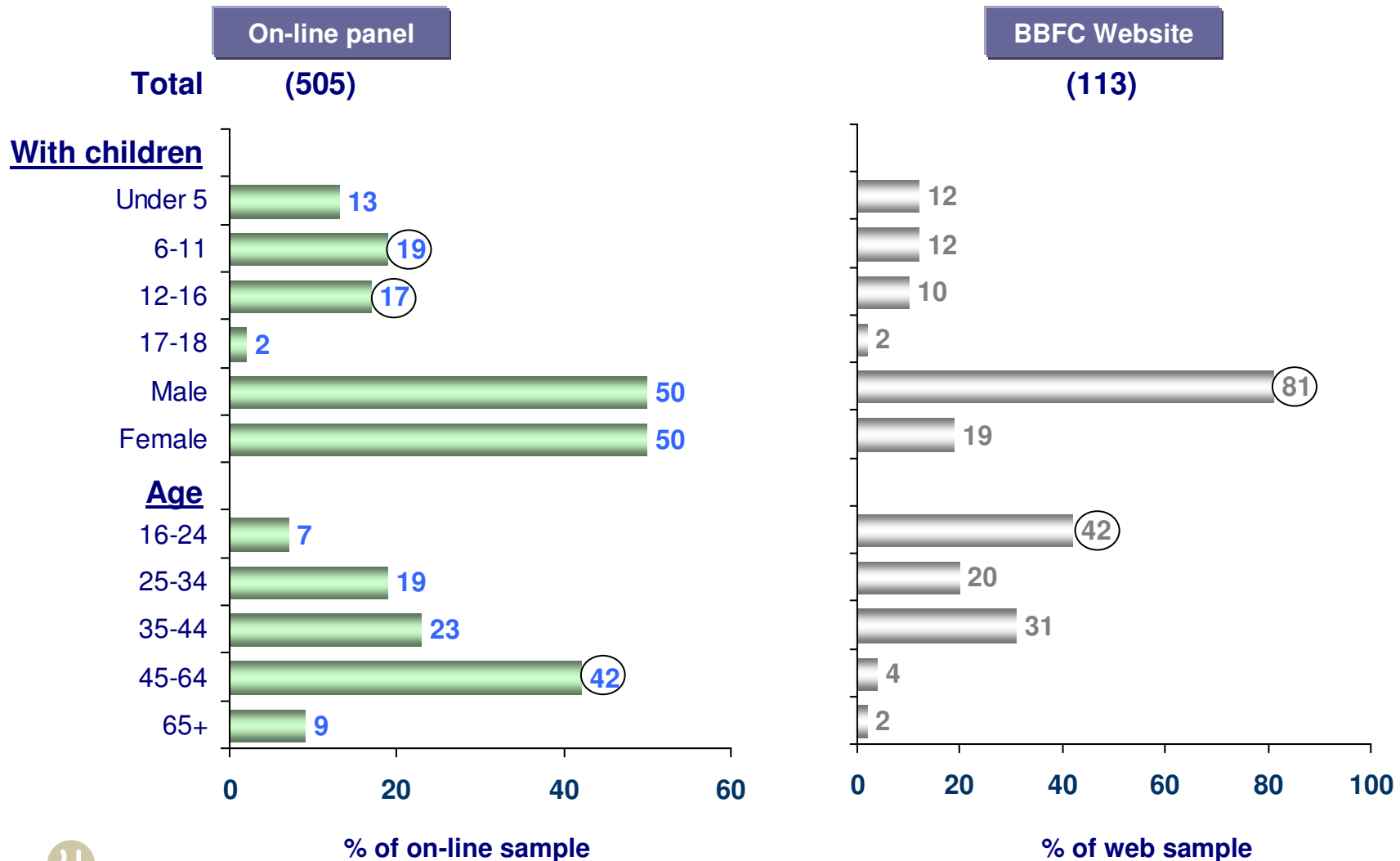
pbbfc and bbfc website visitors between June 2nd-17th



The sample is focused exclusively on on-line respondents because the research's focus is on the regulation of 'on-line' viewing



The profile of each sample is quite different



Recruiting respondents from your websites

Advantages:

- A key target audience for the BBFC
- They 'know' you and what you do
- They are more likely to be film enthusiasts
- They have a more 'informed' opinion on classifications

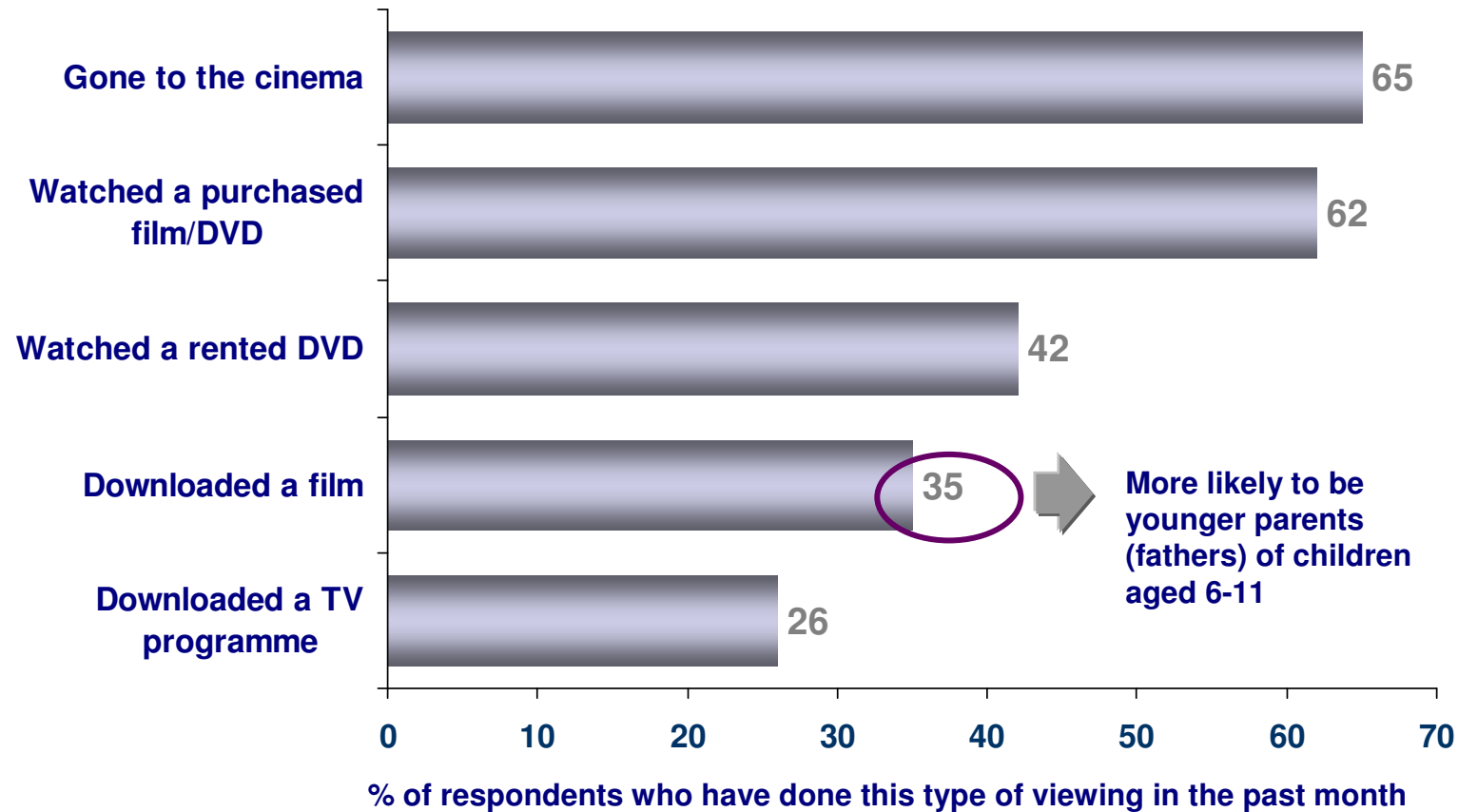
Drawbacks:

- Very skewed demographic profile (younger men; 34% are students)
- Seem less 'trusting' of the BBFC (general cynicism)
- Less keen on any form of classification

Combined data from both web and panel samples is presented in this document , except on questions where the web sample data is very skewed.



More than 1 in 3 respondents have downloaded a film in the past month





Is the viewing public anxious about on-line content?

Question asked:

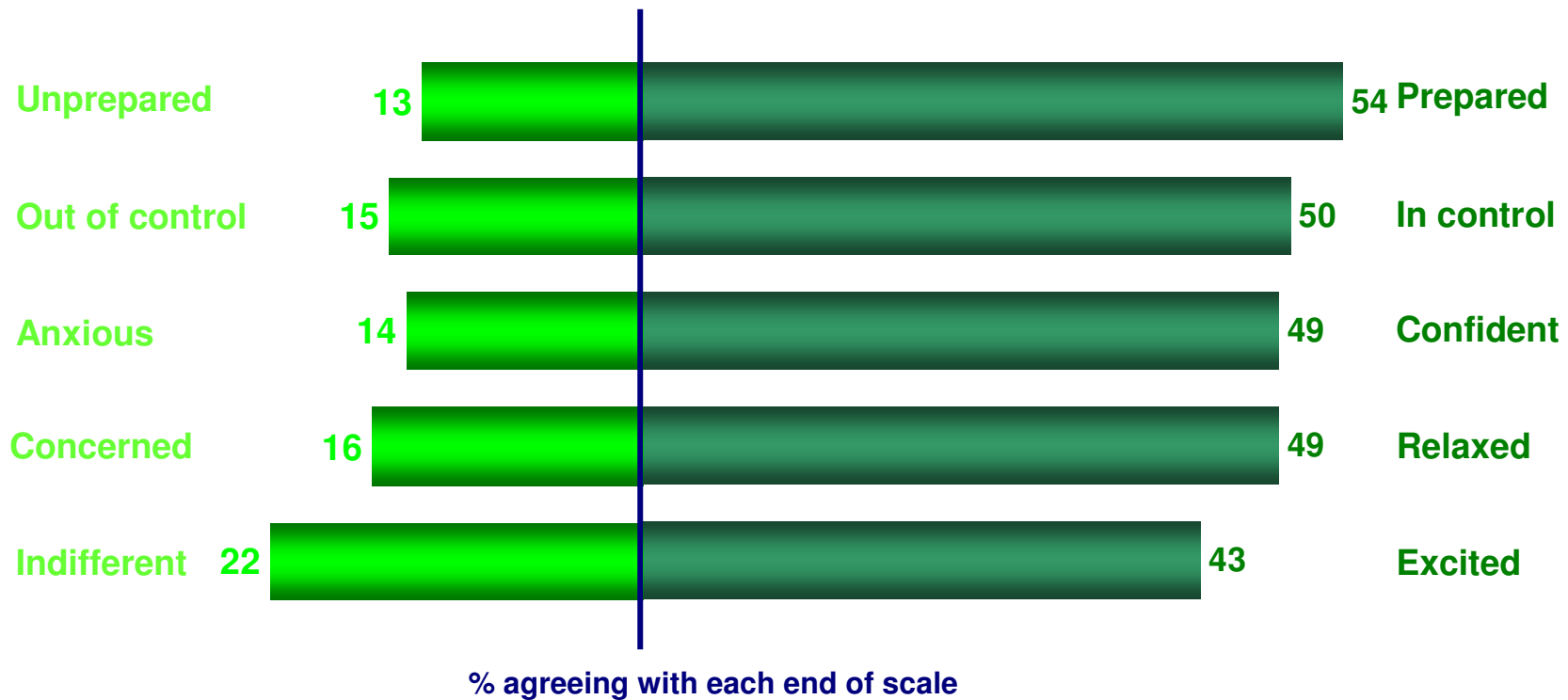
More and more of our viewing may be taking place via the internet in the future. How do you feel about the sort of content that will become available? ***Please tick the box on each row that is closest to describing how you feel about the likely increase in 'on-line' viewing***

<i>Unprepared</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Prepared</i>
<i>Out of control</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>In control</i>
<i>Anxious</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Confident</i>
<i>Concerned</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Relaxed</i>
<i>Indifferent</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Excited</i>



The sample has a largely positive attitude towards the viewing opportunities that the internet provides

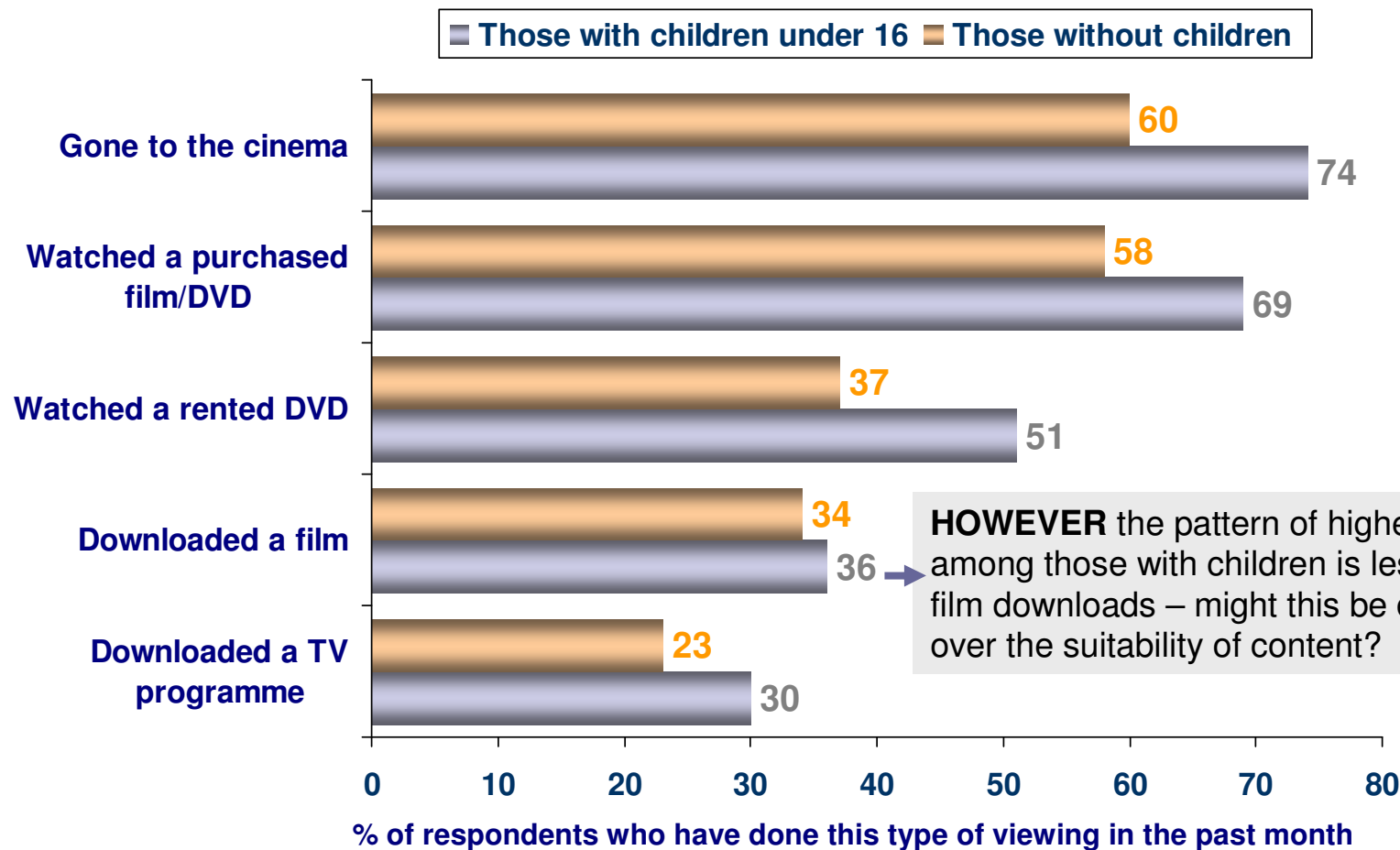
Q7. How do you feel about the content that will become available on the internet in the future?



Base: Total sample (618)



Families with children under 16 are the most likely to have been viewing films in the past month



Source: SQ1. Total sample base = 219 with children; 399 without children.

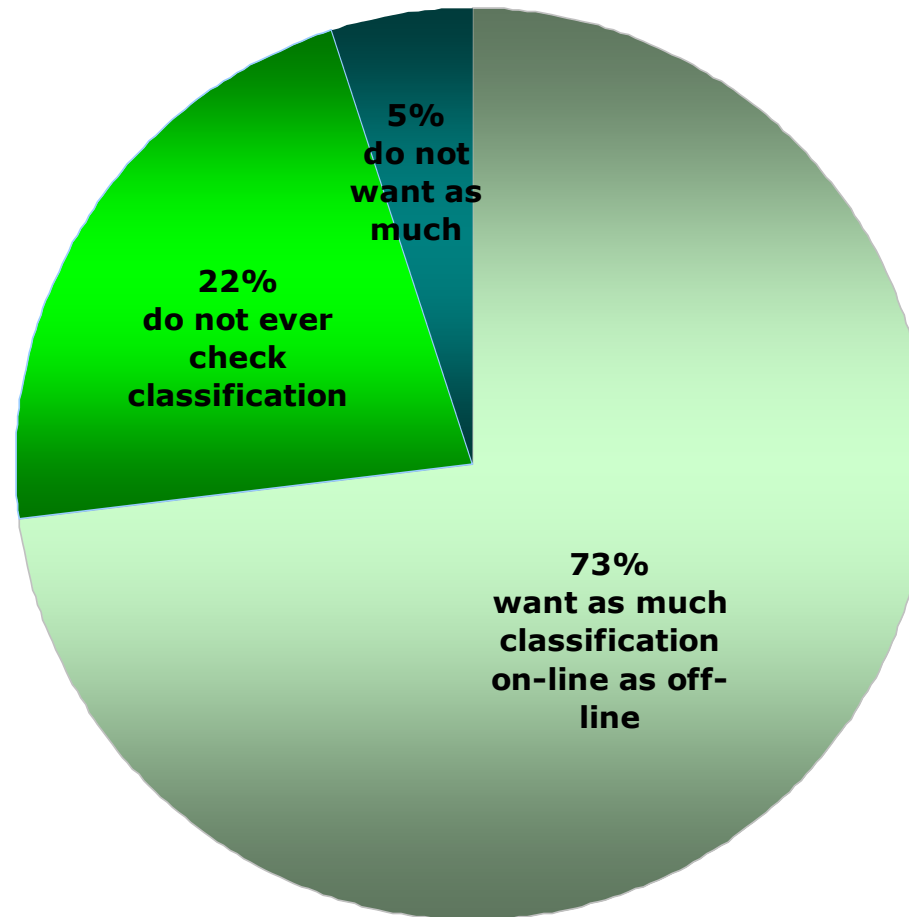




ON-LINE VIEWING REGULATION – EXPECTATIONS

The majority would like to see the same level of regulation in place, as viewing via the internet increases

Q8. Should on-line classification be the same as we have off-line?

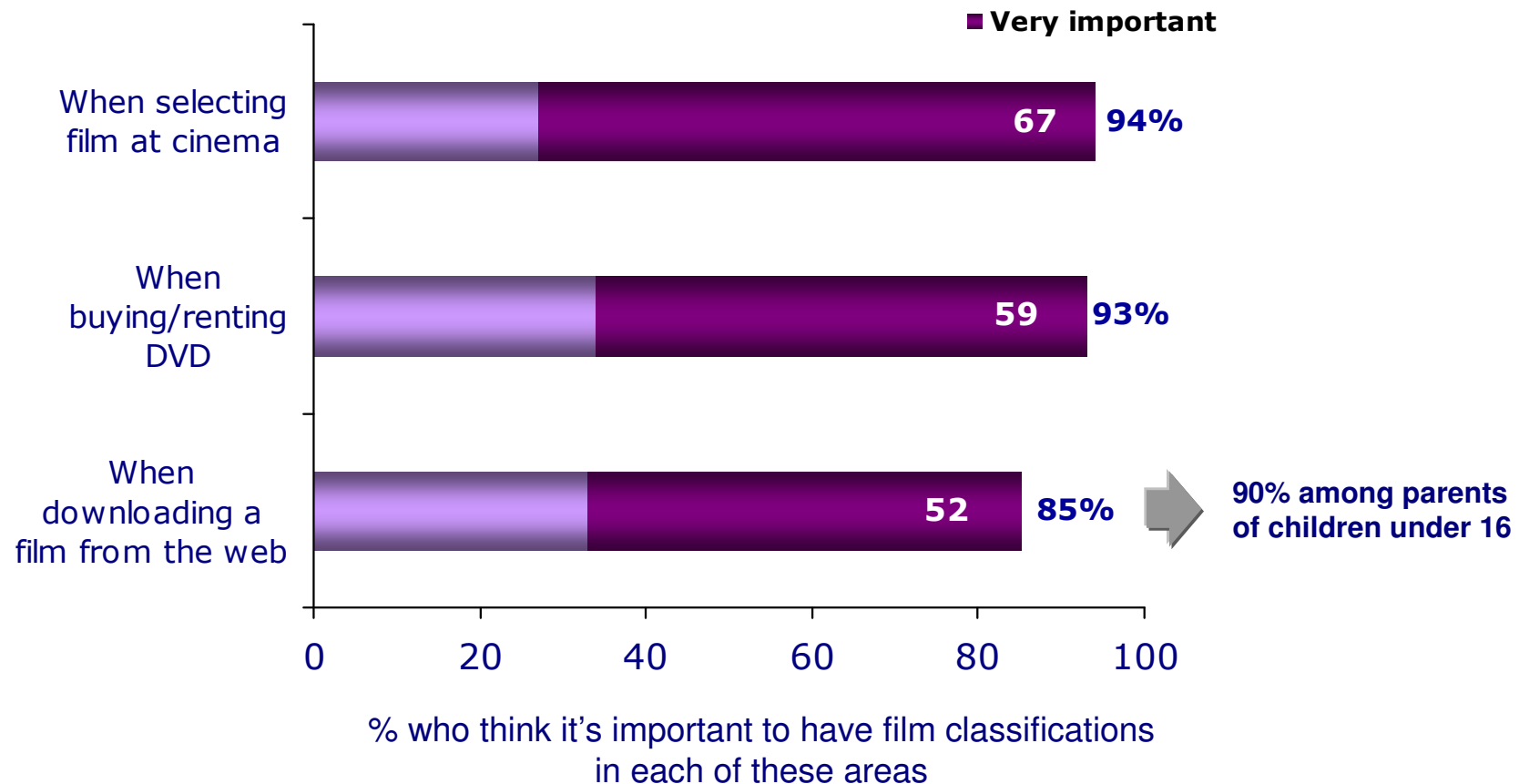


Base: On-line panel sample (503)



Most viewers consider it important to have consistent classifications available for film downloads

Q6. How important is it to have consistent classifications available?



Base: Panel sample respondents (505)

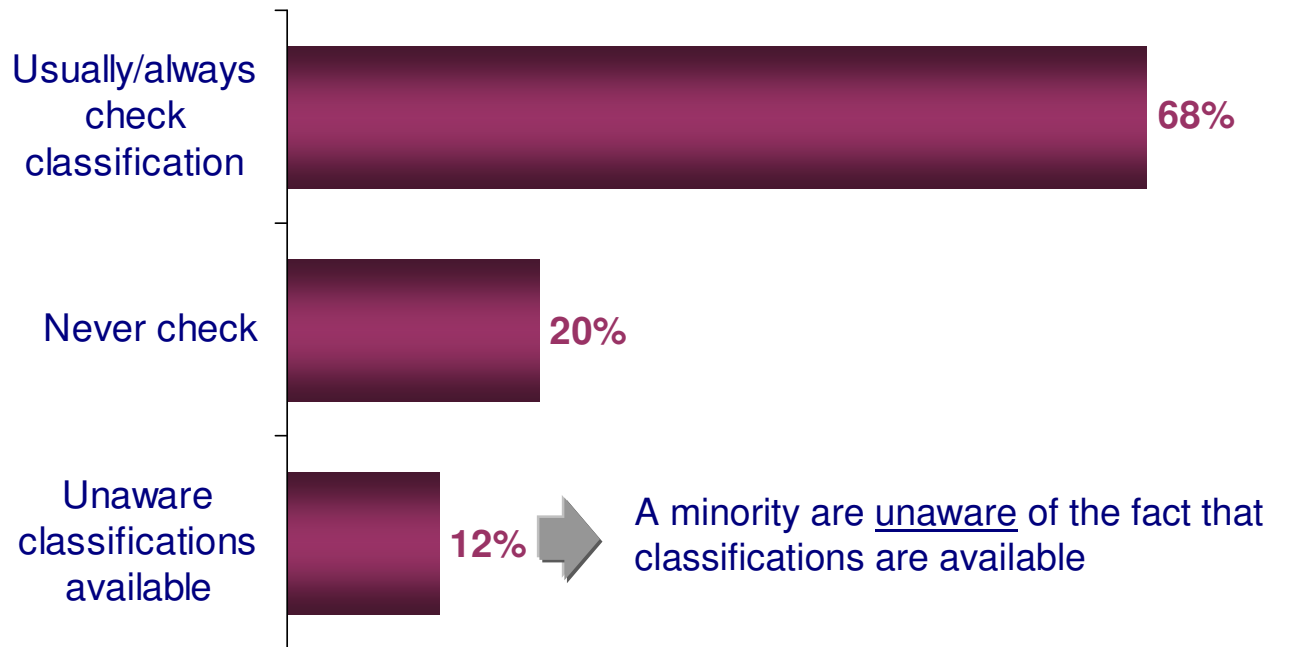




ON-LINE CLASSIFICATION CHECKING BEHAVIOUR

Most viewers are checking for classifications when downloading films

Q3. To what extent do you ever check classifications when downloading a film?



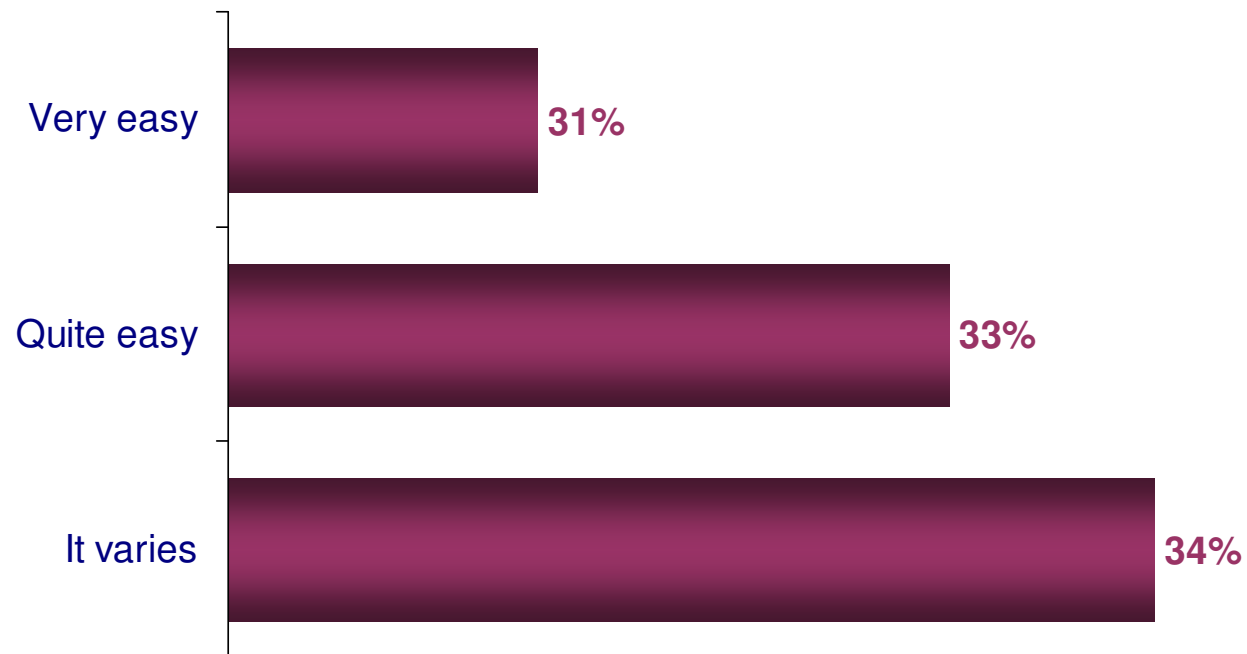
% of those who have viewed on-line in the past month

Panel sample base = 345



It's not always easy to check classifications on downloads though

Q4. How easy do you find it to check ratings on films/programmes you download?

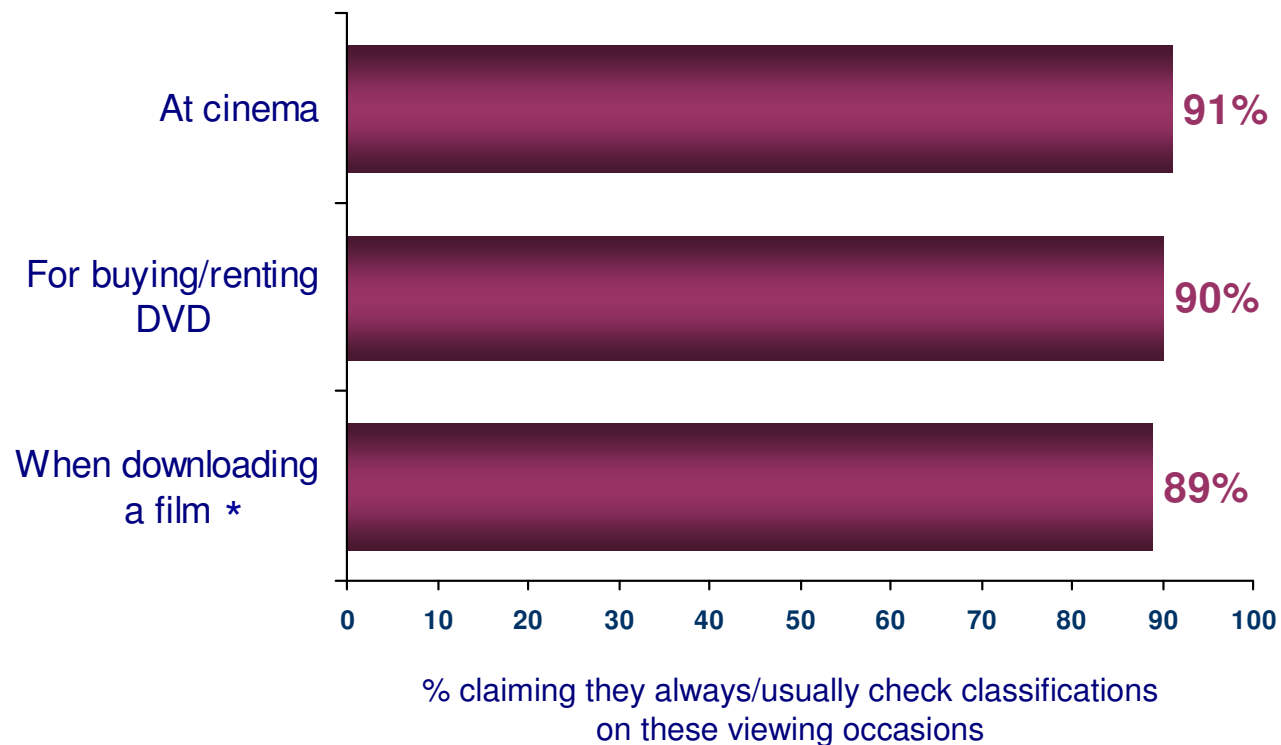


Base: On-line film viewers from panel and web samples who check classifications (278)



There is just as much scrutiny of on-line viewing as there is off-line, among parents of children under 16

Q3. To what extent do you ever check classifications ?



Panel sample base = parents of children under 16 on each viewing occasion (Cinema and DVD = 190; Download = 140)



There is an active preference for viewing 'classified' films when downloading



66% of those who download films say they would prefer to download films that are classified



This preference for viewing classified films rises to 82% among those with children under 16

Q5: Would you prefer to download a film that you have not watched before, if it has a clear classification rating shown?
Panel sample base (on-line viewers) = 200





PREFERRED CLASSIFICATION SOURCE

The BBFC's services are particularly appreciated by parents and those who regularly download films

92% of all respondents claim to find the services offered by the BBFC useful
(45% rate the BBFC's services as very useful)



The BBFC is most appreciated by:

- parents of 12-16 year olds (**61% rate services as very useful**)
- those who regularly download films (**56% rate as very useful**)



83% trust BBFC's classifications 'all' or 'most' of the time

There is also strong appreciation of BBFC's wider information services



Extended Classification information

89% consider this service to be useful



Consumer Advice
Contains moderate violence and one use of strong language

Summary
Hanna is the only survivor of a secret project, conducted in Poland to genetically develop the perfect soldier. When she completes her training with her father, she is launched against her nemesis, a woman now working for the Americans.

Extended Classification Information
‘Hanna’ is a post-Cold War action thriller about a former intelligence operative, who lives with his 16 year old daughter, Hanna, in the arctic wastes of Finland, where he is training her to be an assassin. The film contains moderate violence and one use of strong language.



The moderate violence in the film includes some dynamic and crunchy fight sequences but relatively little is seen in terms of blood or injury detail. In one scene, Hanna breaks the neck of a female interrogator but the action is very quick and the detail barely registers. In another scene, she has a fight with three assassins in a container port. She disarms one man and stabs him with his own knife, cutting his throat. However, the action is very fast and there is no lingering on detail and little sight of blood. The other fight scene of note occurs when Hanna’s father is confronted by three assassins in a Berlin U-Bahn station. Once again, the action is very fast. The father is armed with a knife but his use of the weapon is limited to tucks to an opponent’s thigh and another’s arm before it is thrown into the

Consumer advice:

88% consider this service to be useful


Source:Q10 How useful do you find this information. Base: All respondents (618)





CONCLUSIONS

The demand for content classification is likely to remain high in the internet age

- While the internet brings greater choice, freedom and flexibility to film viewing, the **majority of viewers still consider it important to be able to check the suitability of films they download**
- As more content becomes easily available on-line, it is likely that the desire for classifications will remain the same, or in fact increase, as **most film viewers claim to prefer to download films that are classified**. This will be particularly true for families with children under 16
- While the **majority are aware of and currently using on-line classifications**, this is not always proving easy to do. There seems to be room for improvement regarding the consistent availability of on-line classifications
- The **BBFC is a recognised and trusted source of classification information**, that brings a sense of confidence and security when downloading content, particularly for  the parents of children who are the most active on the internet