



Age Ratings You Trust

Online Music Video rating Research Findings

September 2015



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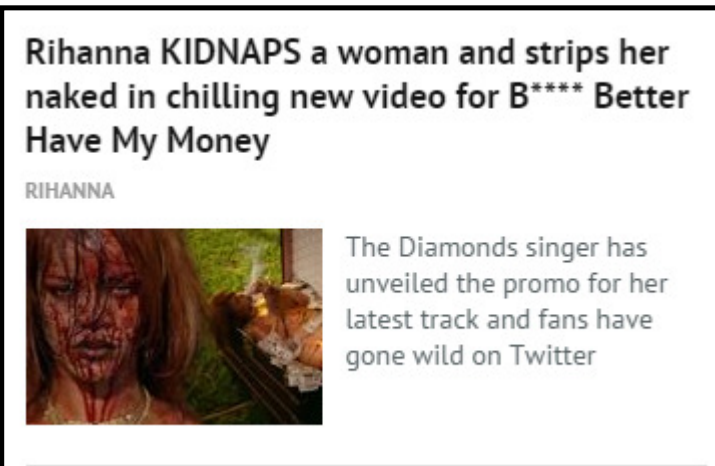
MARKET RESEARCH

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The issue

- In response to growing concern over the ease of access to explicit content in music videos, the UK government has backed a pilot programme that presents age ratings on a selection of online music videos
- The BBFC and BPI (in partnership with Vevo; YouTube; Universal Music; Sony Music and Warner Music) launched the music video pilot on March 26th 2015
- The music video pilot covered UK repertoire from the three major UK labels only
- A total of 123 music videos were classified by BBFC during the music video pilot period up to July 2015



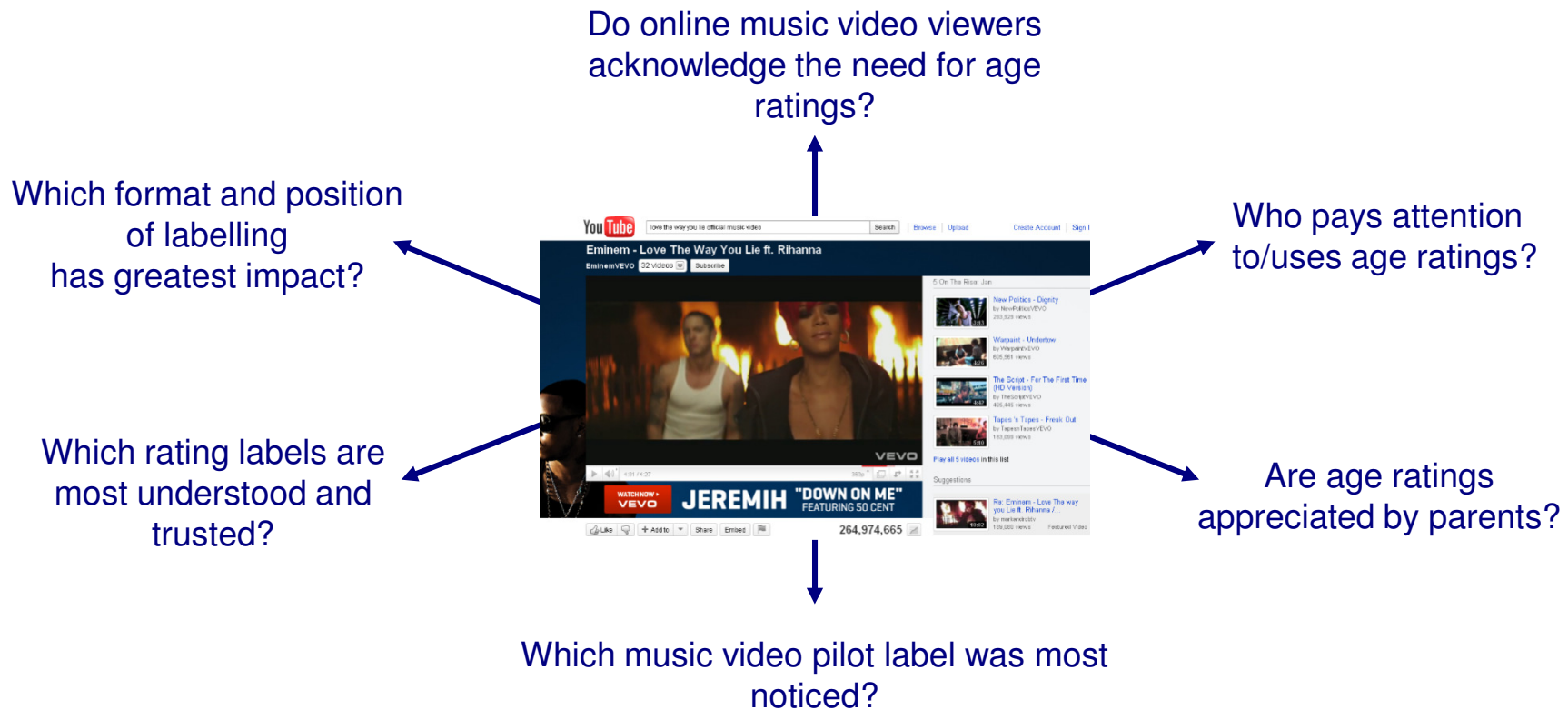
Mirror 2/7/2015






What was required from the research ?

- The BBFC wants to measure viewer recall of the music video pilot age ratings as well as understand broader attitudes toward, usage and impact of, online age rating labels:





Key findings

1. 70% of parents with under 12 year olds are concerned about their children being exposed to inappropriate music video content
2. A significant proportion of children (up to 60%) are watching music videos which they know their parents would not approve of. In the selection of videos surveyed, US artist videos were some of the most likely to be considered inappropriate by parents
3. 16% of those watching pilot music videos recall having seen an age rating label – the Vevo label (BBFC age symbol) was more likely to be recalled than the YouTube partner rating label (24% vs 14%)
4.  is the preferred online age label format – 54% of adults selected it as the most likely to be noticed and 53% as the easiest to understand
5. There is a clear desire among parents to have more supervision over their children's online viewing:
 - 75% of parents would like online channels to link music video age ratings to parental controls
 - given the choice, 86% of parents would encourage/ensure their children watch online channels with clear age ratings





Presentation content

1. Survey methodology and sample profile
2. Opinion on the need for and importance of online age ratings
3. Awareness and recall of online age ratings
4. Most effective format and positioning of online age ratings
5. Conclusions and Implications





Whom did we speak to?

- 3421 interviews were conducted toward the end of the music video pilot period in June 2015 among adults aged 18+ and children aged 10-17yrs who watch music videos online
- A nationally (UK) representative on-line panel survey was undertaken, with a boost sample of 244 street interviews among parents and children in Northern Ireland and Wales*, to ensure statistically valid sample sizes were achieved in each geographical area

Sample achieved

Audience	England	Northern Ireland	Scotland	Wales	TOTAL
Children 10-17yrs, who watch music videos on Vevo or YouTube	432	67	41	58	598
Parents of children who watch music videos on-line	1316	124	103	109	1652
Nationally representative adults aged 18+	825	108	119	119	1171
TOTAL	2573	299	263	286	3421

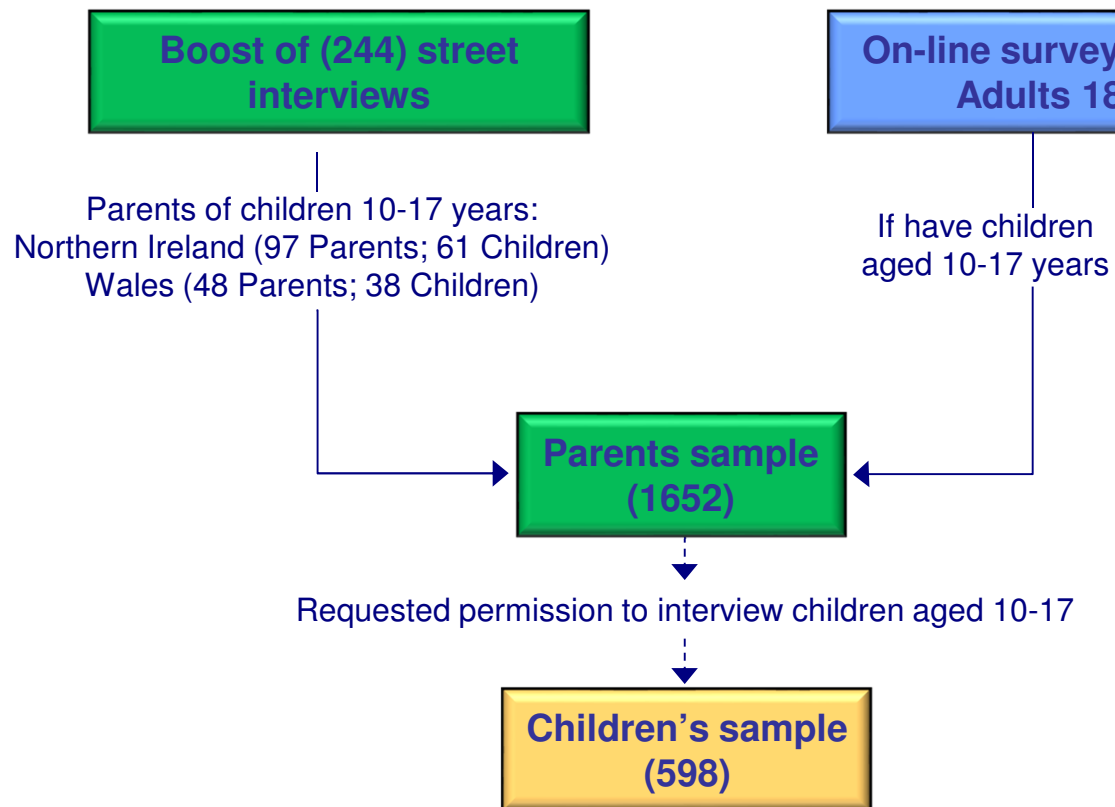
*It should be noted that there is a tendency for respondents to give more 'politically correct' answers in face to face interviews than in (anonymous) on-line interviews – this influence may be reflected in the results for Northern Ireland and Wales where street interviews were conducted to boost the sample.





Sample recruitment and composition

Combination of online and street interviews



Online fieldwork was conducted via the Public Knowledge Online Panel in June 2015

Street interviews were conducted by the New Fieldwork Company in eight locations in Northern Ireland and five locations in Wales, during the same period.





Demographic profile of adults

2823 Adults %

Gender:

Male	47
Female	53

Age:

18-34	18
35-44	25
45-54	34
55+	23

Age of youngest child in household:

Under 9	18
10-11	23
12-14	29
15-17	30

Social class:

AB	36
C1C2	47
DE	17

Religious:

Yes	26
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The sample was recruited to be as representative as possible of the UK population in terms of gender, region and social class.

The sample is not nationally representative in terms of age because of the focus on recruiting parents of children aged 10-17yrs who watch music videos online.





Demographic profile of children

598 Children
%

Gender:

Male

47

Female

53

Age:

10-11

25

12-14

36

18-34

39

Religious:

Yes

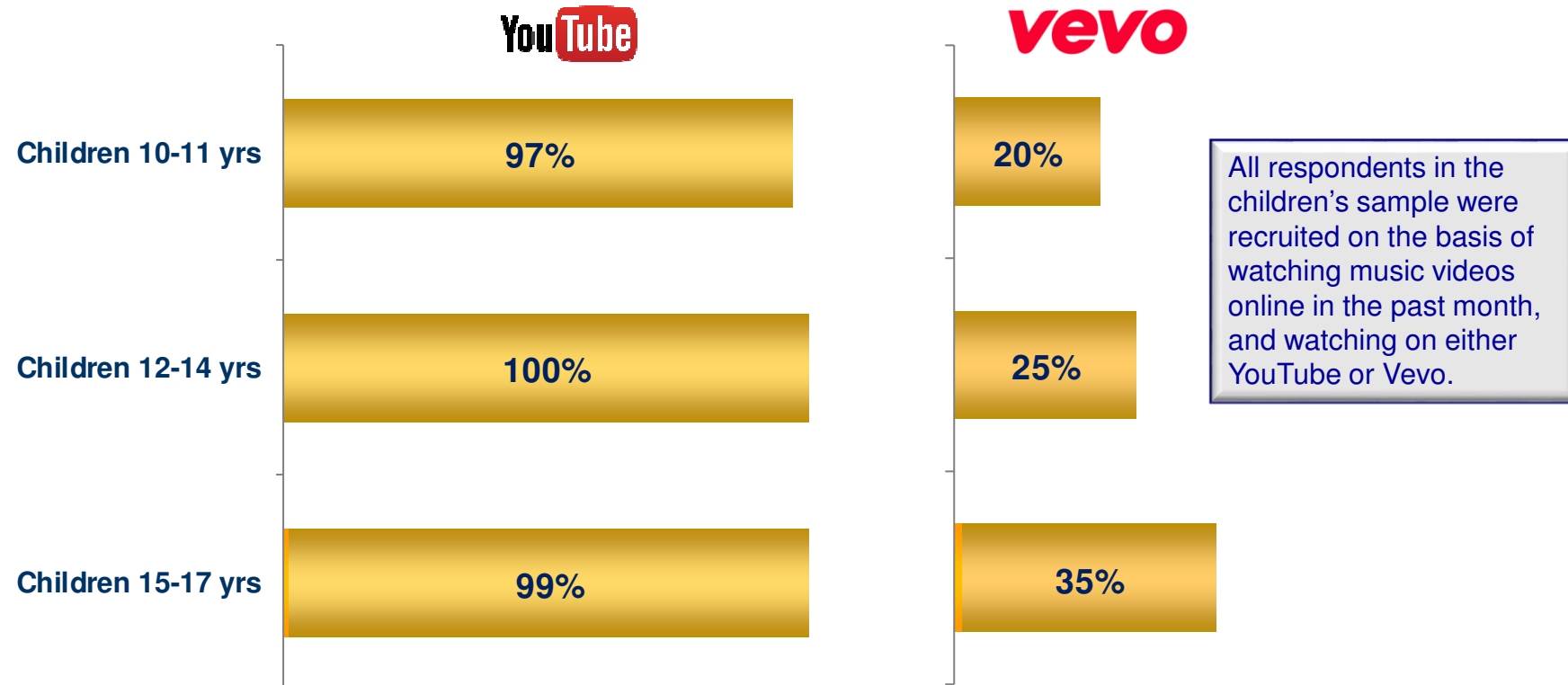
25





YouTube is the main online music channel watched by children - Vevo is popular among older teenagers

% who ever watch music videos on these channels





What did we ask them ?

- The survey covered the following topic areas, with different versions of the questionnaire administered to children aged 10-17yrs, parents of children aged 10-17yrs and adults without children aged 10-17yrs:
 - Levels of concern over online music video content
 - Opinion on the importance of age ratings for online music videos
 - Awareness of age ratings for music video downloads
 - Recall of the age rating music video pilot labels used on YouTube and Vevo
 - Impact and opinion of different age rating formats
 - Opinion on the age appropriateness of selected music videos
 - Preferred positioning of music video age labelling on-screen





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Key findings

There is a clear need for online age rating

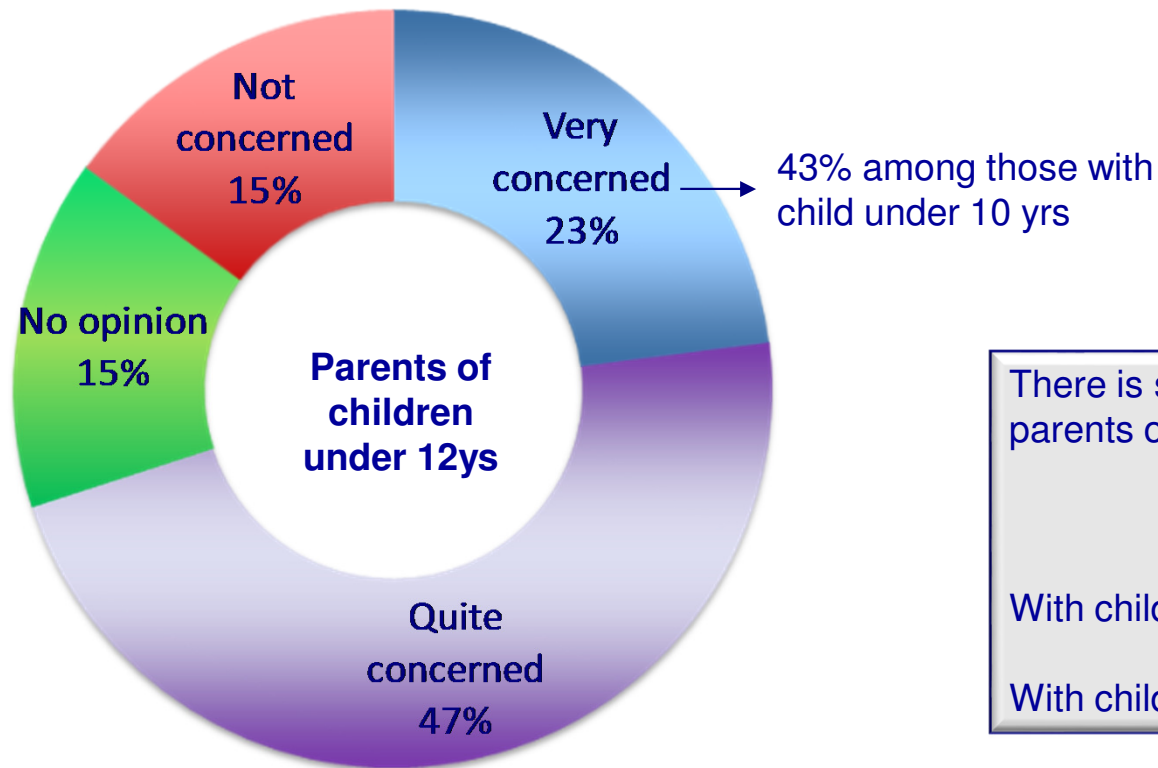
- 70% of parents of under 12yr olds are concerned about music video content
- Up to half of children under the age of 15 are watching music videos that the majority (70%+) of parents consider unsuitable for this age group
- 80%+ of parents considered a selection of videos outside of the scope of this pilot (and therefore unrated) as unsuitable viewing for children





70% of parents of under 12yr olds are concerned about inappropriate content in music videos

% level of concern over inappropriate content in music videos



There is significant concern, among parents of older children too:

	% very/quite concerned
With child 12-14yrs (564)	60%
With child 15-17yrs (590)	48%



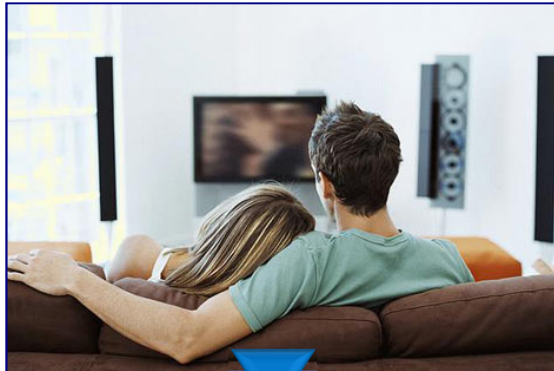
Q1. How concerned are you about your children seeing or hearing inappropriate content in music videos that they stream or download?
Base: Parents (with youngest child under 12 = 498)



While predictably less concerned than their parents about music video ratings, some children do see the importance

% saying it's important to have age ratings for music videos

Adults (including parents)



78%

Children aged 10-11



53%

Children aged 12-17



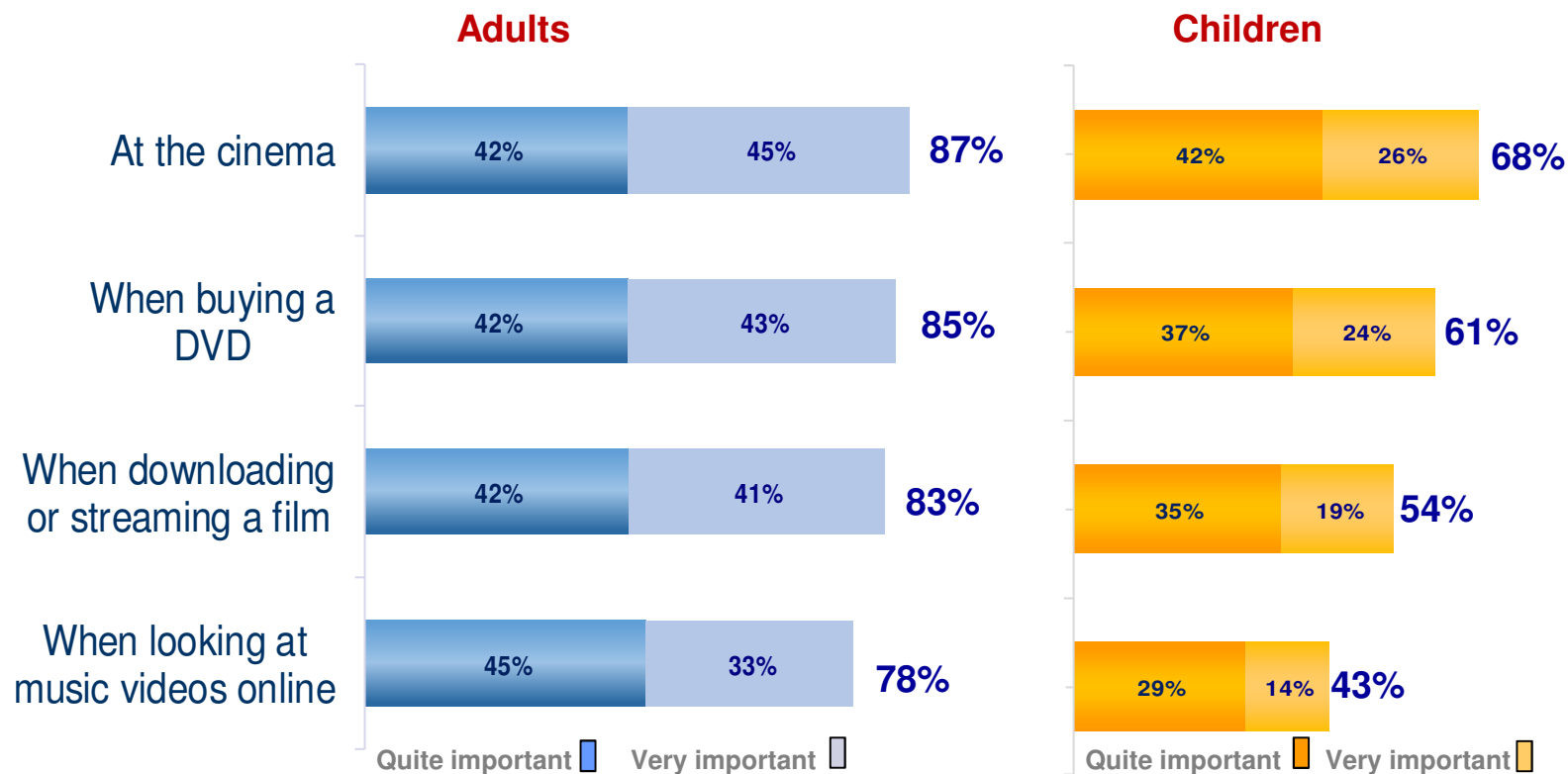
39%





Music video age rating is seen by parents as almost equally important as that of film and DVD rating

% saying it's important to have age ratings



Q2. How important do you think it is to have age ratings when watching music videos online ?

Base: All respondents





Wider concerns

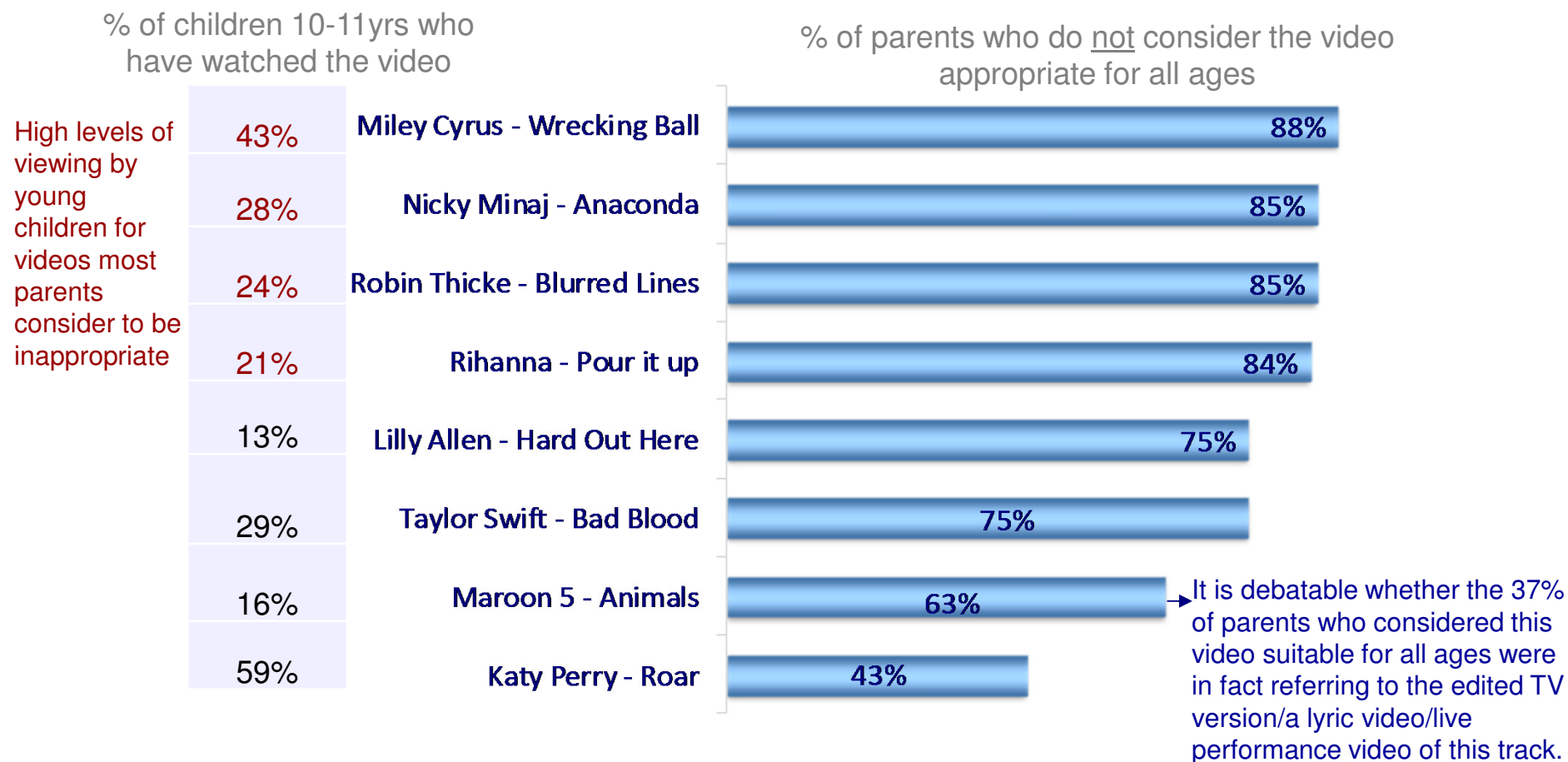
In response to concern over non-UK artists and other works not being included as part of the music video pilot, the survey evaluated response to a small selection of non-UK/unrated music videos

Parents were asked which age groups they considered suitable for viewing the selected music videos; children were asked whether they had seen these videos and whether their parents would approve of them watching the videos

Respondents were shown the artist name and music video title as a prompt



High levels of viewing by young children for music videos that more than 80% of parents consider to be inappropriate



Q12. What age rating do you think would be appropriate for the music videos here that you have seen?
Base: Adults who have seen each video; Children aged 10-11 (152)

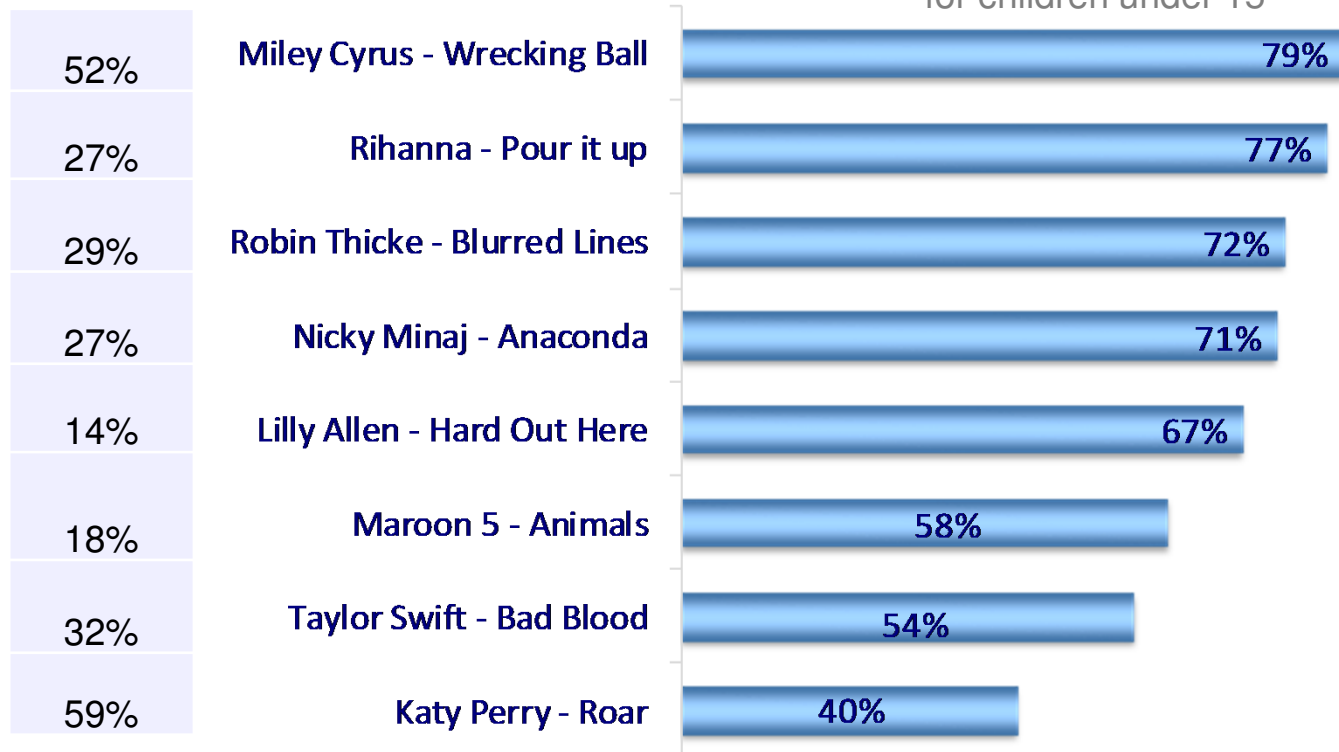




52% of 10-14yr olds have seen Wrecking Ball, despite 79% of parents considering it inappropriate for under 15's

% of children 10-14yrs who
have watched video

% of parents who consider video inappropriate
for children under 15

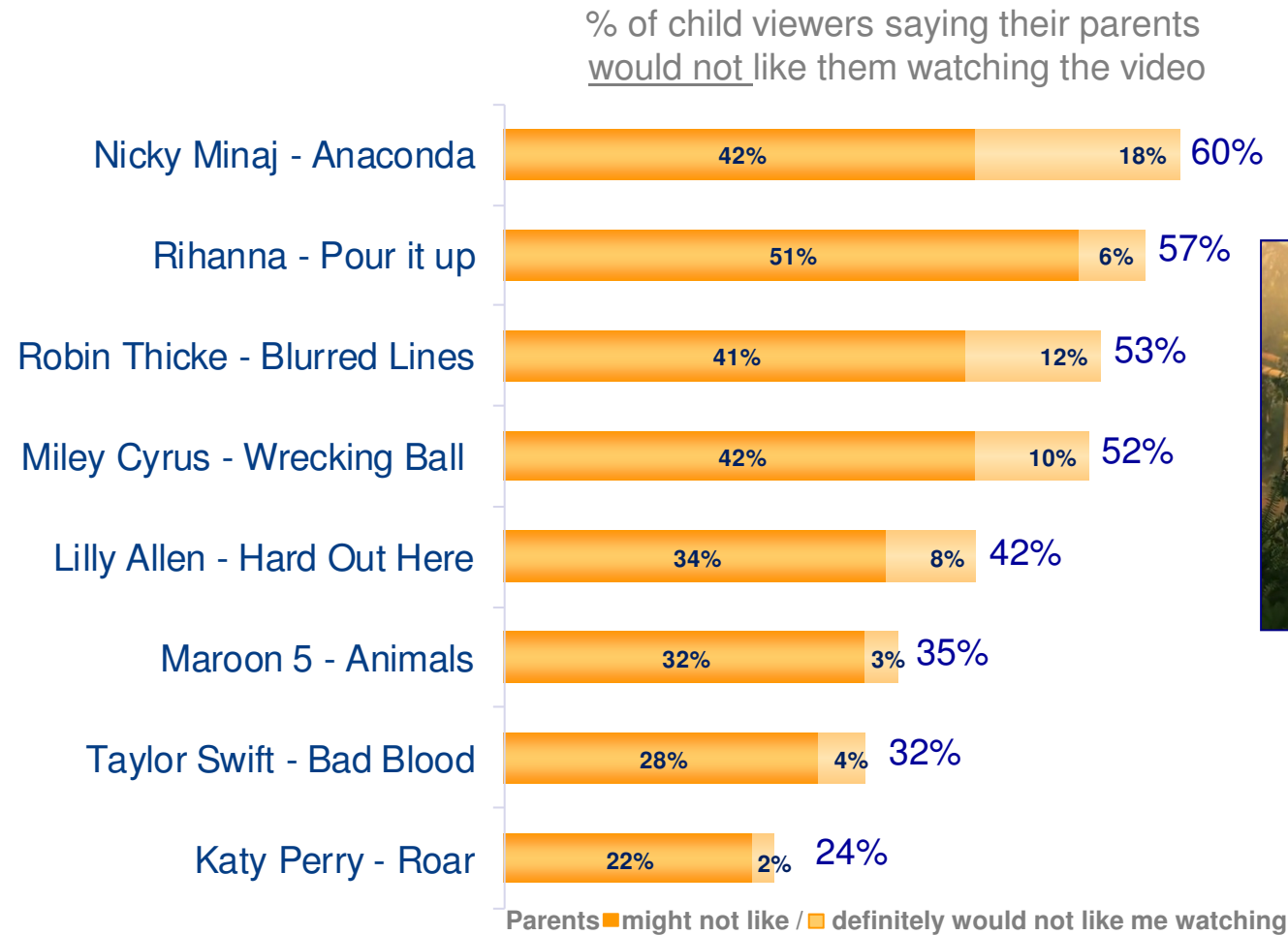


Q12. What age rating do you think would be appropriate for the music videos here that you have seen?
Base: Adults who have seen each video; Children aged 10-14 (367)



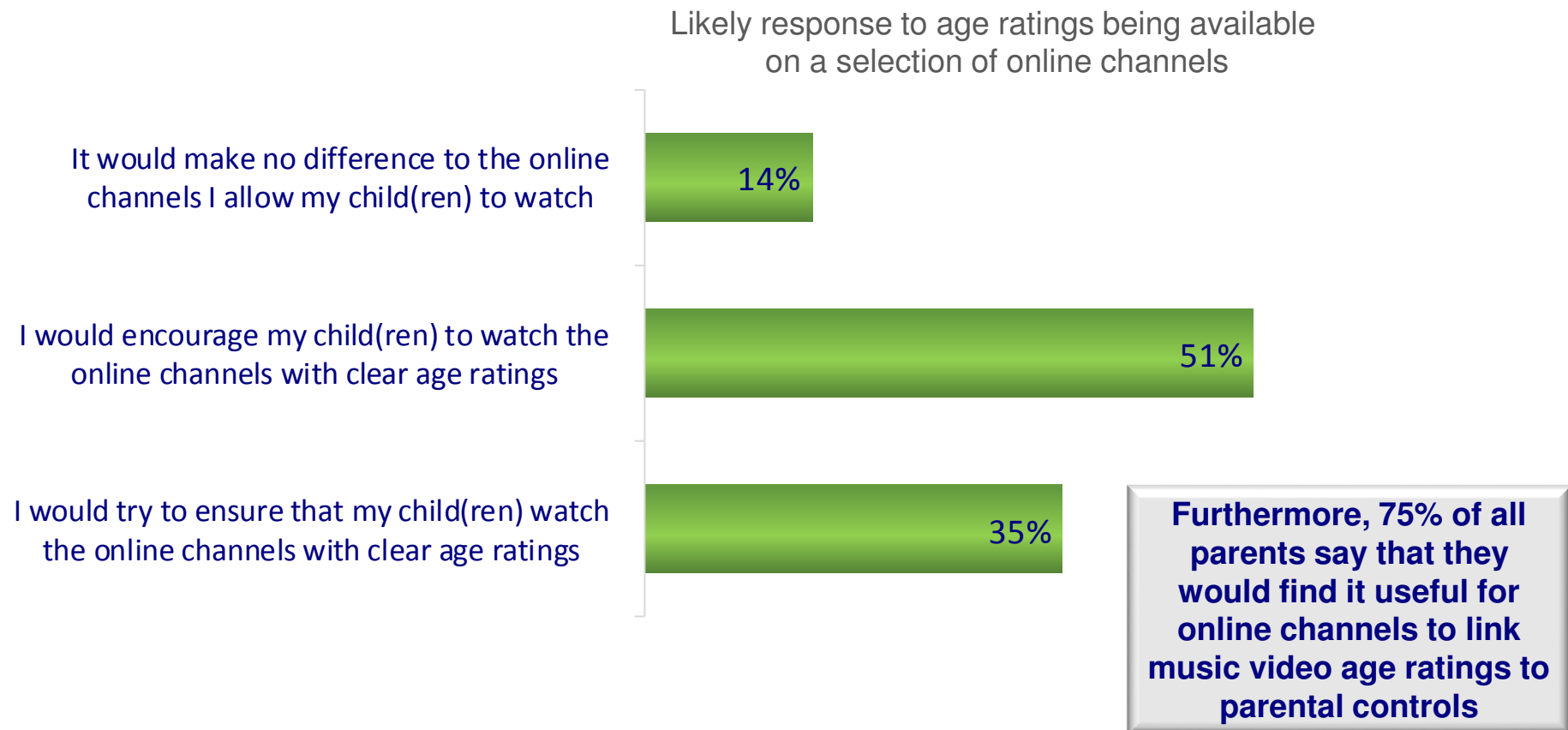


A large proportion of children admit that they are watching videos their parents would not approve of





86% of parents say they would encourage/ensure their children use online platforms that carry age ratings



Q8. If some online channels offered clear age ratings for films and music videos, and others did not, what would your response be?
Base: Parents sample (1652)





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Key finding

The majority assume that age ratings are already available for online music videos

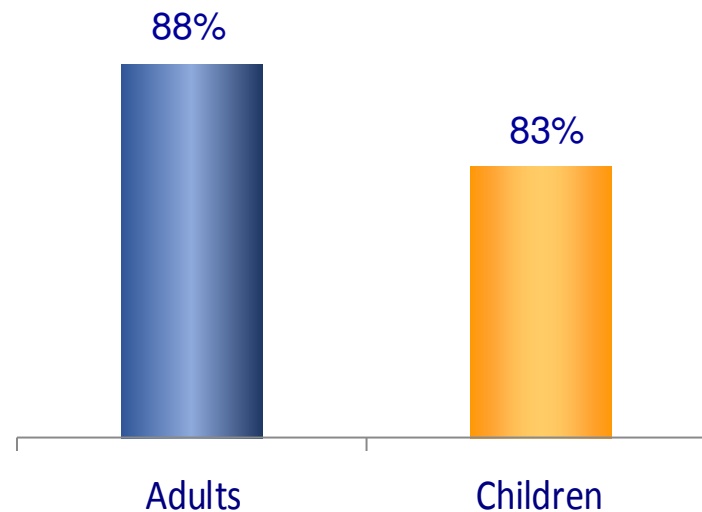
- 87% believe that age ratings are already available on music videos downloaded/ streamed
- Attention is being paid to music video age ratings currently, as a significant proportion of both parents and children claim to be checking ratings when downloading/streaming music videos
- 24% of viewers (adults and children) claim to recall seeing the music video pilot ratings on Vevo and 14% noticed the rating label that appeared on YouTube





There is almost universal misconception that music videos carry age ratings

% who think age ratings are available when watching music videos



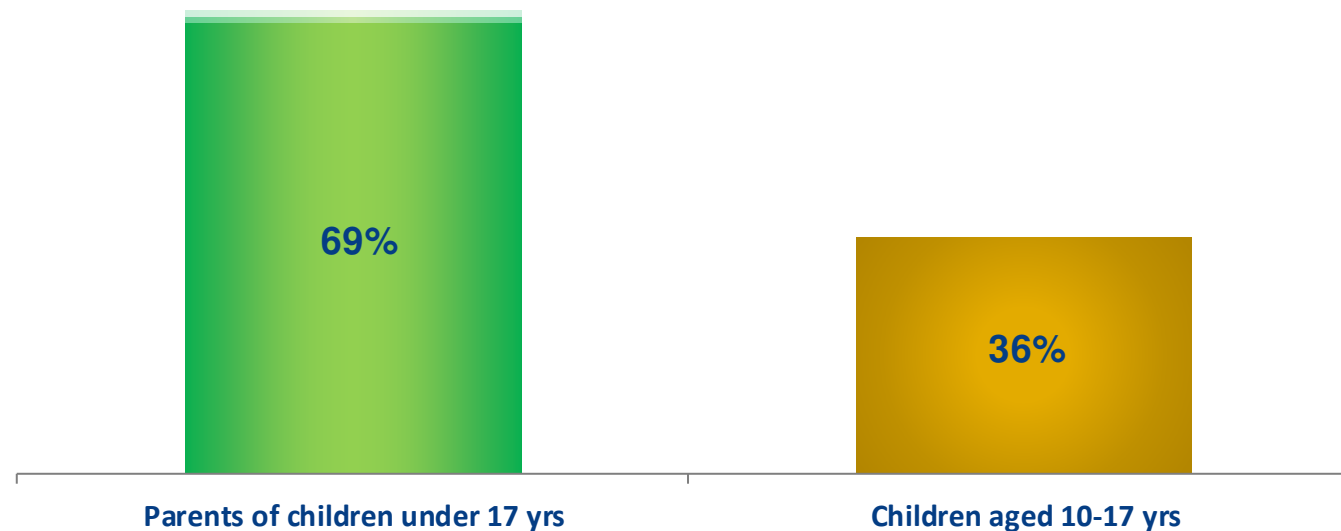
Q3. What is your use of age ratings. Base: (All who download or music videos – Adults = 2546; Children = 598)





A significant proportion of viewers are looking to check age ratings when downloading/streaming music videos

% claiming to ever check age ratings when downloading/streaming music videos





Age ratings and parental advisory labels have been noticed by a good proportion of viewers

- 48% of adults and 49% of children (who say they usually check for ratings) claim to have noticed age ratings or parental advisory labels on a range of channels when downloading/streaming music videos
- This level of claimed recall of age ratings is encouraging, given the inconsistent scope and format of music video rating that currently exists
- There is some variation in claimed recall of age ratings by viewers on each of the pilot online channels (the base number of viewers in the sample who claim to check ratings is shown in brackets), which may be due to the different format and positioning of labels on these channels:

vevo (297) 57%

You**Tube** (1260) 48%





Recall of the music video pilot age ratings

Given the relatively small scale of the music video pilot, the survey sample was recruited to focus on those most likely to have been exposed to the age rating labels piloted – the age rating label recall data is therefore based on:

- Viewers of each channel (Youtube or Vevo)
- Those who have seen at least one of the BBFC age rated music videos

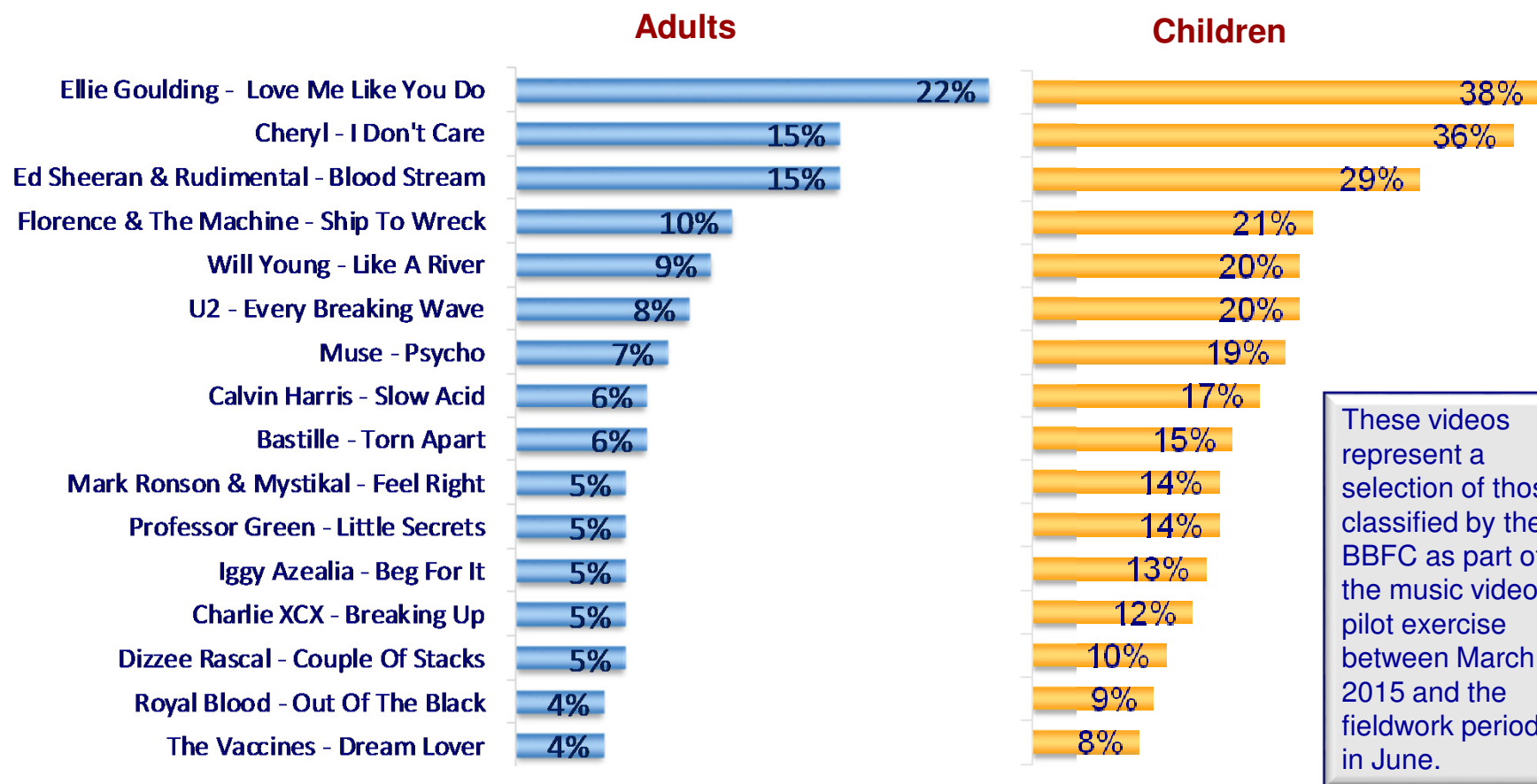
The survey only checked recall for the 12 age rating symbol as an example, and not for the full range of symbols that would have appeared (i.e. U; PG; 15 and 18) during the pilot. The recall levels for the age symbols may therefore be under estimated (as viewers responded on a literal basis to the prompted 12 symbol only).





62% of children and 47% of adults in the sample have seen at least one of the BBFC classified videos

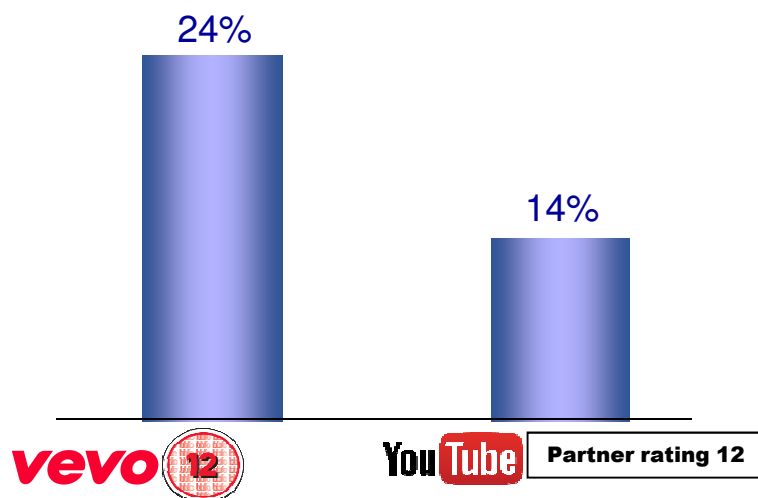
Selection of videos classified in the music video pilot





1 in 6 of those watching pilot music videos recall an age rating – the Vevo label was more likely to be recalled

% of viewers recalling each age rating label
(following prompting with label)



Given the relatively limited scope of the pilot (in the context of all music videos seen by viewers), these recall levels are encouraging.

Based on the higher penetration (and therefore assumed frequency) of viewing for YouTube, a stronger recall for the partner rating label might have been expected though.

In contrast, the recall level for the age rating label used by Vevo, does not take into account additional recall for age symbols other than '12' that would have been seen.

Q11. Did you notice this label when watching any of these music videos on YouTube/Vevo?

Base: Adults and children who have seen at least one of the music video pilot music videos on Vevo (429)/YouTube (1327)





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Key finding



is the most preferred rating label

- The clarity, colour and detail of this label results in it being selected as the most impactful & helpful to see online
- **Partner rating 12** is the least preferred labelling option because of its small size and vagueness
- The labelling formats preferred on screen are those which give the age rating greatest prominence





Alternative age rating options were shown to respondents in random order for evaluation

OPTIONS FROM THE MUSIC VIDEO PILOT



Partner rating 12

POTENTIAL ALTERNATIVE LABEL OPTIONS

EXPLICIT

CAUTION



MODERATE THREAT, SEXUAL IMAGES

BBFC 12 - MODERATE THREAT, SEXUAL IMAGES

GUIDANCE

A number of alternative screen label positioning options were also tested by showing respondents video screen mock-ups



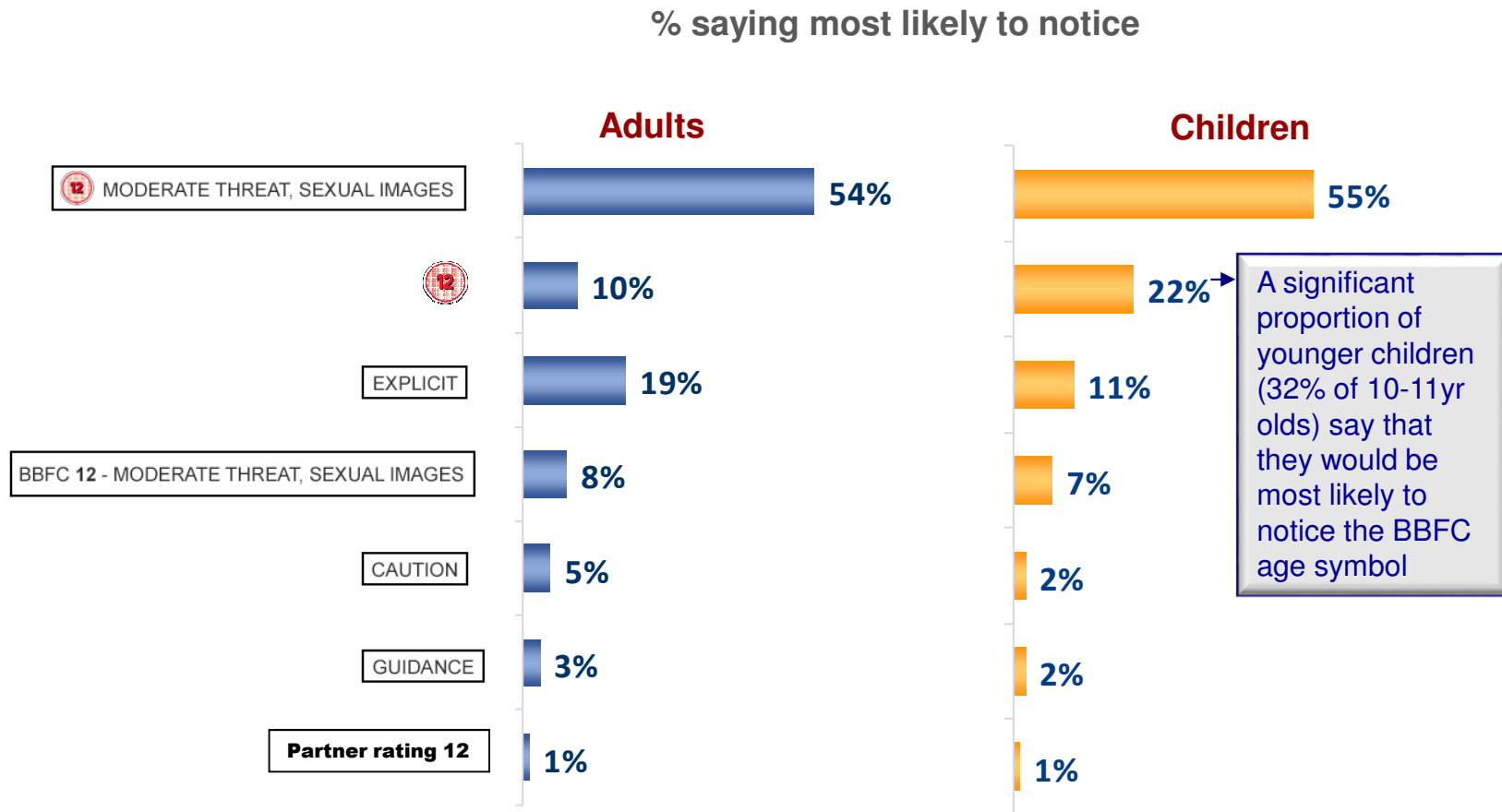


PREFERRED MUSIC VIDEO AGE RATING LABEL





The BBFC symbol with short insight* is selected as the label option most likely to be noticed



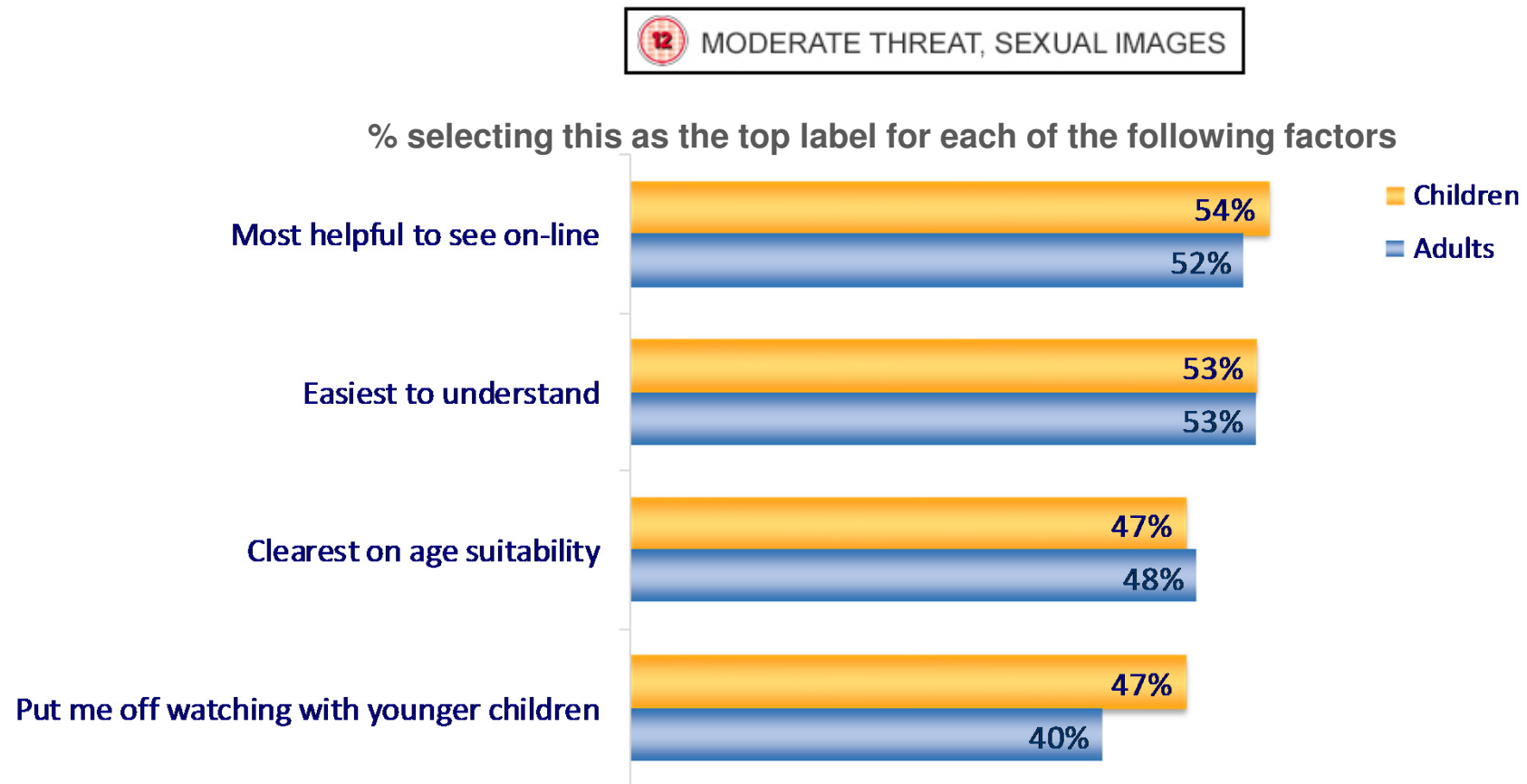
Q5. Please select the label you are most likely to notice? Base: All adults (2823) and Children 10-17yrs (598)

* Short BBFCinsight is content advice specific to the video, highlighting key classification issues





The BBFC symbol with short insight is the top label for helpfulness, understanding, clarity and likely impact





Reasons MODERATE THREAT, SEXUAL IMAGES helpful label to see online

selected as the most

Those selecting this label as most helpful	1480
Reasons given for selection:	
Gives specific age guidance and content warning	60%
It is clear	41%
It is eye-catching/stands out	20%
It is informative	15%
The red/fact it has colour	12%
It is well known	5%





Comments made about the MODERATE THREAT, SEXUAL IMAGES label

Bold Simple Clear Capitals Concise

It warns you about the type of content that may not be suitable for younger viewers

The bold red age in a coloured circle

It uses the BBFC 12 rated logo well, it is recognisable. As well as describing why the rating was so in a clear manner

Consistent with DVD signage, visual image, clear explanation of reason - more than one type of reason listed

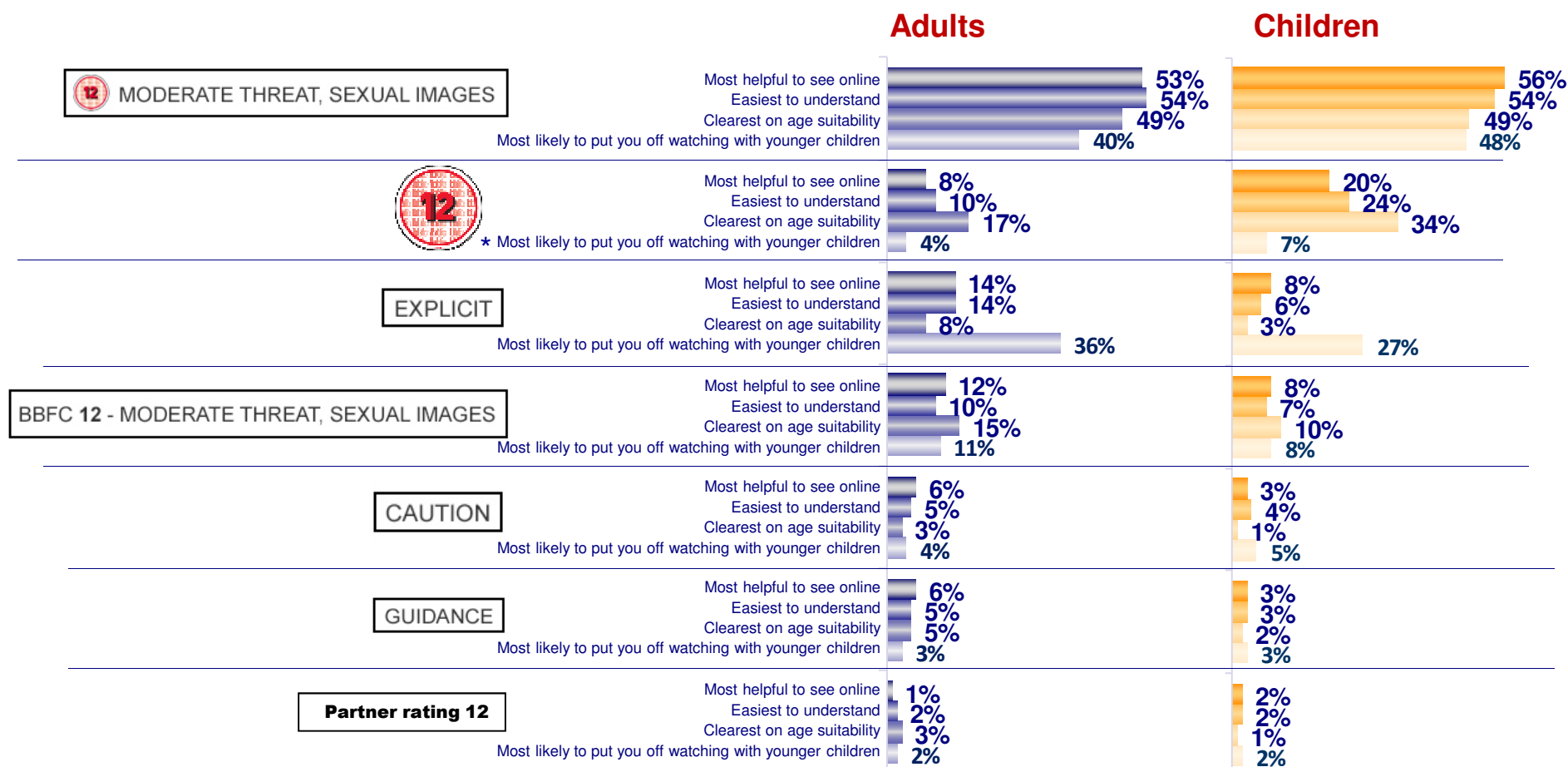
It tells me exactly what I need to know- that it is not suitable for under 12's as there are scenes containing sexual images and threatening behaviour. I would not want my young children seeing this, therefore it is telling me exactly what I need to be aware of in order to protect my children





The BBFC 12 symbol is the second strongest label for children and 'explicit' is second strongest for adults

% selecting label as the best for each statement



Q5. Please select the label you are most likely to notice? Base: All adults (2791) and Children 10-17yrs (579) answering

*N.B. It should be borne in mind that this question did not include the '15' or '18' age symbols more readily associated with explicit content, and therefore comparison on this factor may not be a true reflection of the age symbol's impact





Reasons Partner rating 12 emerges as the least helpful label to see online

Those selecting this label as least helpful	696
Reasons given for selection:	
Small/easy to miss/not visible	54%
Uninformative/vague	31%
Ambiguous/unclear	28%
Unhelpful	5%
Confusing	7%
No age guidance	2%





Comments made about **Partner rating 12**

It is very small so easily missable. What does partner rating mean? What does 12 mean? It does not look recognisable warning or advisory notice

It doesn't give you any reason why it is a 12

Not sufficient explanation

It says virtually nothing

Could easily go unnoticed

It has no description of what the video contains

No indications of content and pretty uninspiring





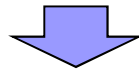
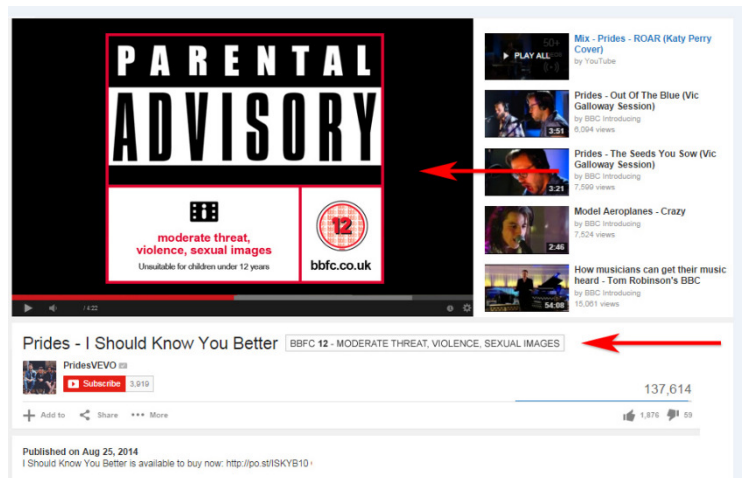
PREFERRED MUSIC VIDEO LABELLING FORMAT ON SCREEN





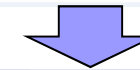
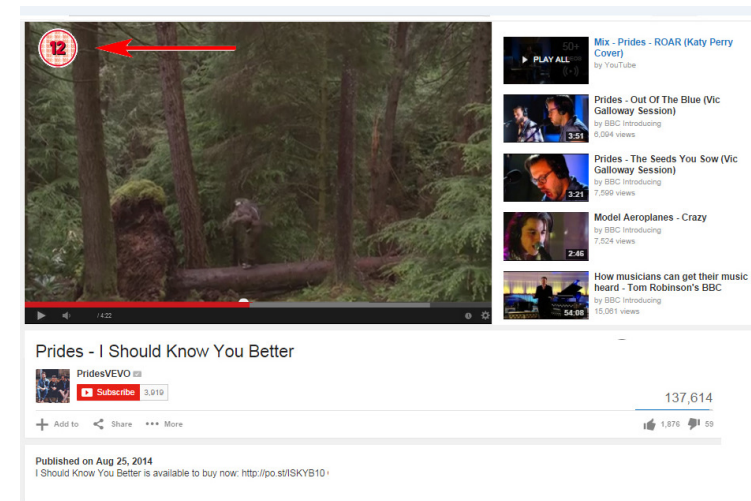
The full screen parental advisory notice with age label alongside the song title is, by a significant margin, the most noticeable format

Most likely to be noticed



68% of adults and children selected this screen labelling option as the one they would be most likely to notice

Second most likely to be noticed



19% of adults and 18% of children selected this screen labelling option as the one they would be most likely to notice

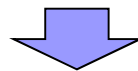
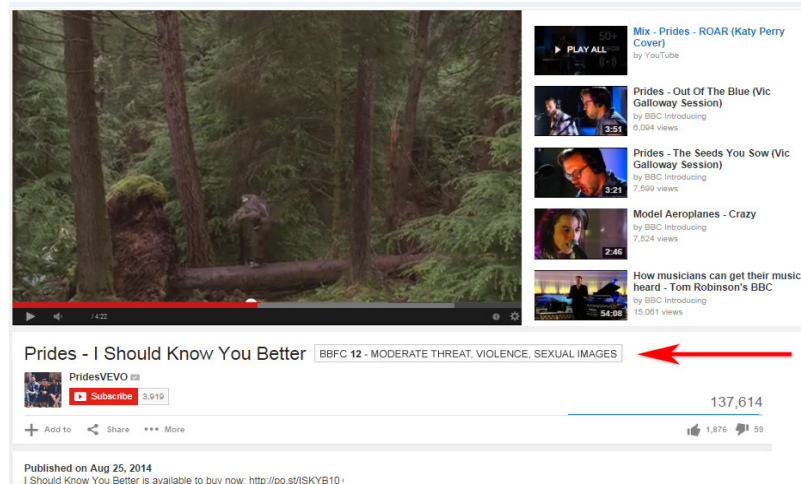


Q13. Which of these differently positioned labels (indicated by red arrows) would you be most likely to notice?. Base: All adults (2823) and children (585)



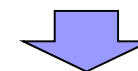
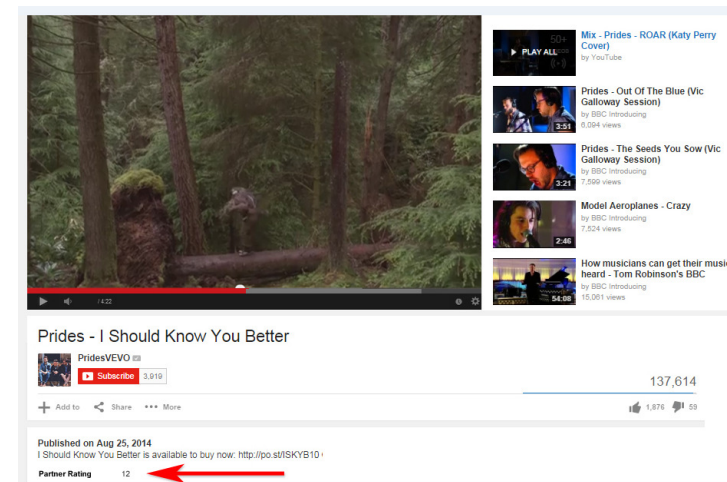
The 'partner rating' screen label is the least noticeable format

Second weakest



This format is more likely to go unnoticed (by 13% of adults and 19% of children) than to be noticed (by 3% of adults and 5% of children)

Least likely to be noticed



73% of adults and 66% of children selected this screen labelling option as the one they would be least likely to notice

9% of adults and 5% of children claim they would not notice any of the age label formats shown



Q13. Which of these differently positioned labels (indicated by red arrows) would you be most likely to notice?. Base: All adults (2823) and children (585)



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Conclusions

1. There is a clear need for online age ratings for music videos, given:
 - the level of parental concern over inappropriate online content that lacks clear sign posting on age suitability
 - the significant level of under-age viewing that is reported for music videos with content that is considered inappropriate by parents, and recognised as such by children
 - the fact that parents claim they would use age ratings to select/try to influence the channels viewed by their children
2. Any age rating adopted needs to be visible and easily understood by parents and children alike. It is therefore concerning that the music video age labelling piloted by YouTube emerged as the weakest of the label options tested, given that YouTube is the main online music channel watched by children of all ages
3. The BBFC age symbol and insight label stands out as the most impactful and helpful for both parents and children – size and positioning of this label needs to be prominent though to overcome difficulties viewers report for online age rating checking





Implications for policy makers

The age rating of the major labels' UK repertoire music videos will go some way in allaying the significant level of concern expressed by parents over inappropriate music video content. However these findings suggest that music video age rating will only achieve its ultimate purpose of protecting children online if:

1. the age ratings cover all potentially inappropriate music videos (including US and indie content)
2. the age rating label is clearly visible, easily recognised and understood by children and parents alike
3. the age ratings are linked to parental controls
4. music video age ratings and insight are displayed on a wider range of popular online platforms

Any further music video piloting will ideally take these factors into account

