



we are
family

VoD/Streaming Services Research 2022

bbfc

RESEARCH OBJECTIVES

The BBFC currently works with 29 VoD and streaming services in the UK to provide trusted age ratings for their content, on a voluntary best-practice basis. This research was commissioned to explore parents'/caregivers' and young people's expectations and requirements for age ratings and content advice on online services.

Previous surveys carried out by the BBFC have consistently shown a high level of support amongst parents for VoD/streaming services used by UK consumers to display the same age ratings as UK cinemas and DVDs.

We wanted to speak to UK parents/caregivers of 4-to 15-year-olds and young people aged 12-19 to find out:

- Which organisations do UK VoD users trust to provide age ratings and content advice?
- Do users trust VoD/streaming services to rate content, and do they understand the age ratings that services use?
- How important is it to users that age ratings reflect the views of UK audiences?
- What do users think of content advice (in addition to age ratings) on VoD services?



OUR APPROACH

Qualitative Research

- 4x 90-minute in-person focus group interviews:
 - 6 x parents/caregivers of 4- to 7-year-olds
 - 6 x parents/caregivers of 8- to 11-year-olds
 - 6 x 12- to 15-year-olds
 - 5 x 16- to 19-year-olds
- Nationally representative sample across a broad range of demographics.

Quantitative Research

- 10-minute survey with 1,033 respondents, including:
 - 780 x parents/caregivers of 4- to 15-year-olds
 - 253 x 16- to 19-year-olds
- Nationally representative sample across a broad range of demographics.
- Criteria for participants included:
 - Must watch content on a VoD/streaming service at least 2-4 times a week.
 - Must subscribe to at least 2 VoD/streaming services.

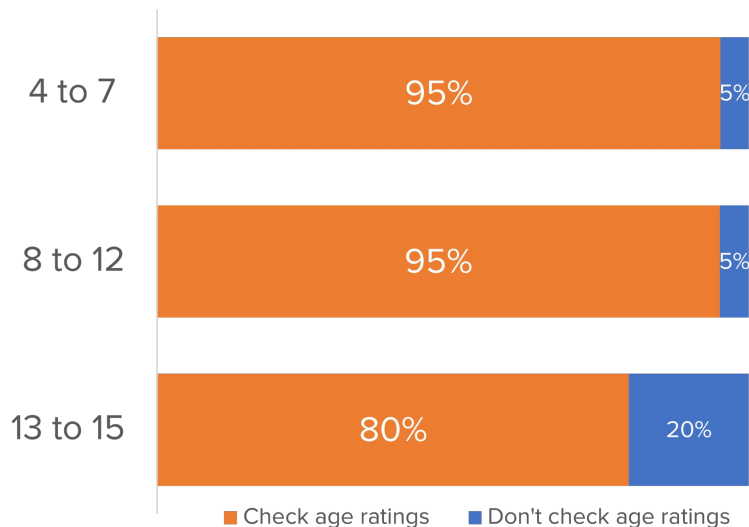
KEY FIGURES

1. **Nine in ten (90%)** parents/caregivers of 4- to 15-year-olds and **eight in ten (80%)** young people aged 16-19 consider age ratings and content advice on VoD/streaming services to be as important as films viewed in the cinema.
2. The majority (**61%**) of parents/caregivers of 4- to 15-year-olds said that they would be concerned if VoD/streaming services each used different criteria to one another when deciding the age ratings and content advice for their content.
3. The most important attributes that UK families want to see in the body responsible for deciding age ratings and content advice are that it be: **transparent; independent from services; up to date with “public” sentiment; reflective of UK sensibilities** (ranked in order of preference).
4. **95%** of parents/caregivers of children 4- to 12-year-olds check age ratings for the content their children watch on VoD/streaming services.
5. Nearly **90%** (89%) of teens aged 16-19 said that they find content advice most helpful when choosing for a person younger than them, such as siblings.
6. **85%** of parents/caregivers of 4- to 15-year-olds and **71%** of teens aged 16-19 stated that content advice is useful for everyone and not just for parents.

AGE RATINGS/CONTENT ADVICE ARE HELPFUL AND IMPORTANT

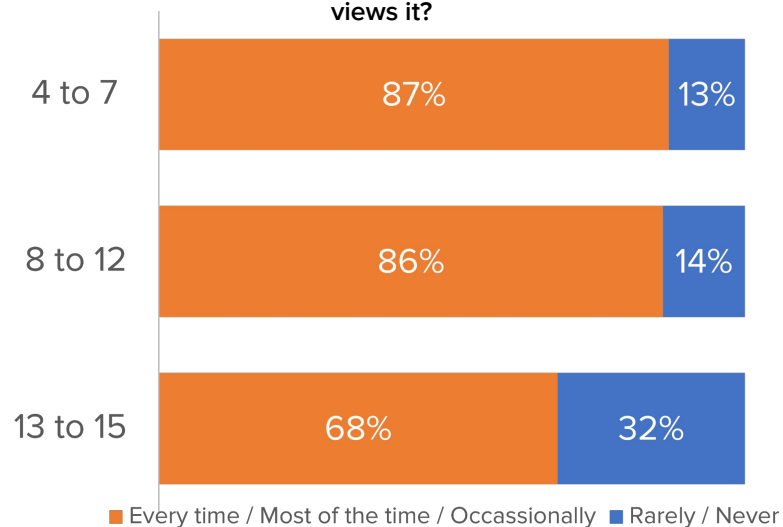
AGE RATINGS

Do parents/caregivers check the age ratings of the content their children watch?



CONTENT ADVICE

Do parents/caregivers proactively seek out a TV series / film's content advice (e.g. *moderate violence, threat, language*) before their child views it?



Source:

I1a: When your child watches a TV series or film, which of the following statements best represents the attention you pay to age ratings (e.g. U, PG, 12, 14+)?

I2a: Do you proactively seek out a TV series/film's content advice (e.g. moderate violence, threat, language) before letting your child views it?

Base: 780

NEARLY 90% OF TEENS FIND CONTENT ADVICE MOST HELPFUL WHEN CHOOSING CONTENT FOR A PERSON YOUNGER THAN THEM

AGE RATINGS

Do 16- to 19-year-olds check the age ratings of the content that *they* watch?



■ Check age ratings ■ Don't check age ratings

"If I was putting something on for them [a younger sibling] I would pay more attention to the age."

- 15-year-old boy

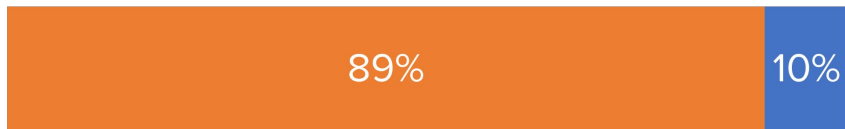
CONTENT ADVICE

Do 16- to 19-year-olds check the content advice of the content that *they* watch?



■ Every time / Most of the time / Occasionally ■ Rarely / Never

If 16- to 19-year-olds were choosing content for a person much younger than them, would they pay more attention to the content advice?



■ Definitely / Probably ■ Possibly / Definitely not ■ Not sure

Source:

I1b. When you watch a TV series or film, which of the following statements best represents the attention you pay to age ratings (e.g. U, PG, 12, 14+)?

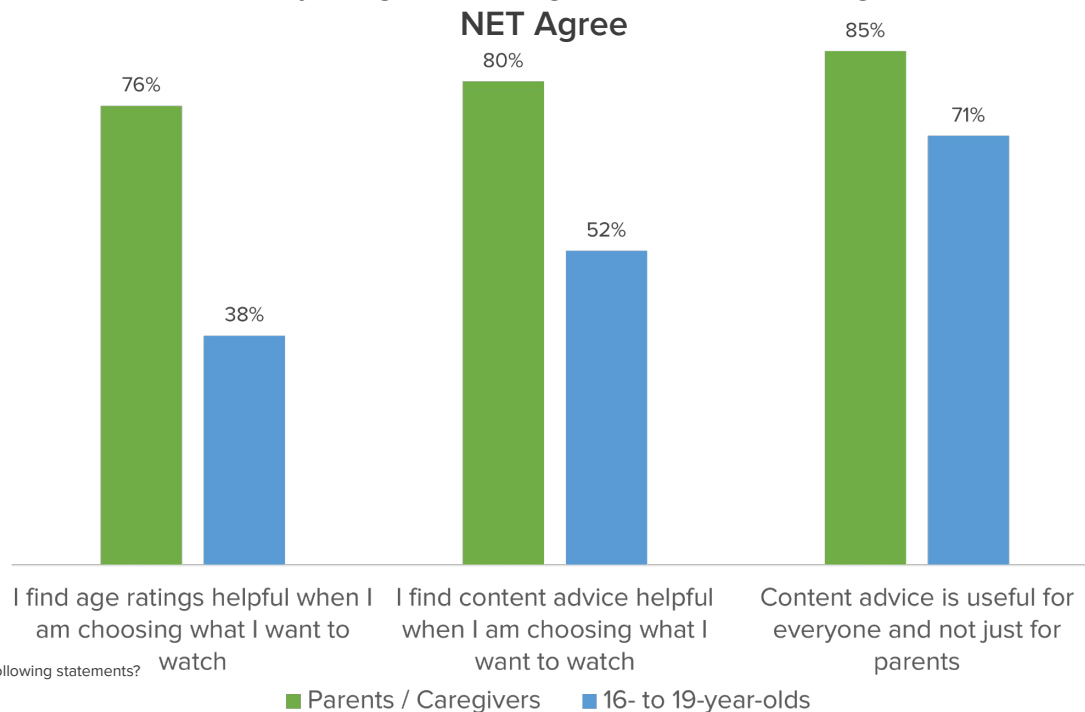
I2b. Do you proactively seek out a TV series/film's content advice (e.g. moderate violence, threat, language) before viewing it?

I6. If you were choosing content for a person much younger than you to watch, for example a sibling, other family member or friend, would you pay more attention to the content advice?

Base: 253

HIGH DEMAND FOR AGE RATINGS/CONTENT ADVICE AMONGST ALL AGES

To what extent do you agree or disagree with the following statements?



Source:

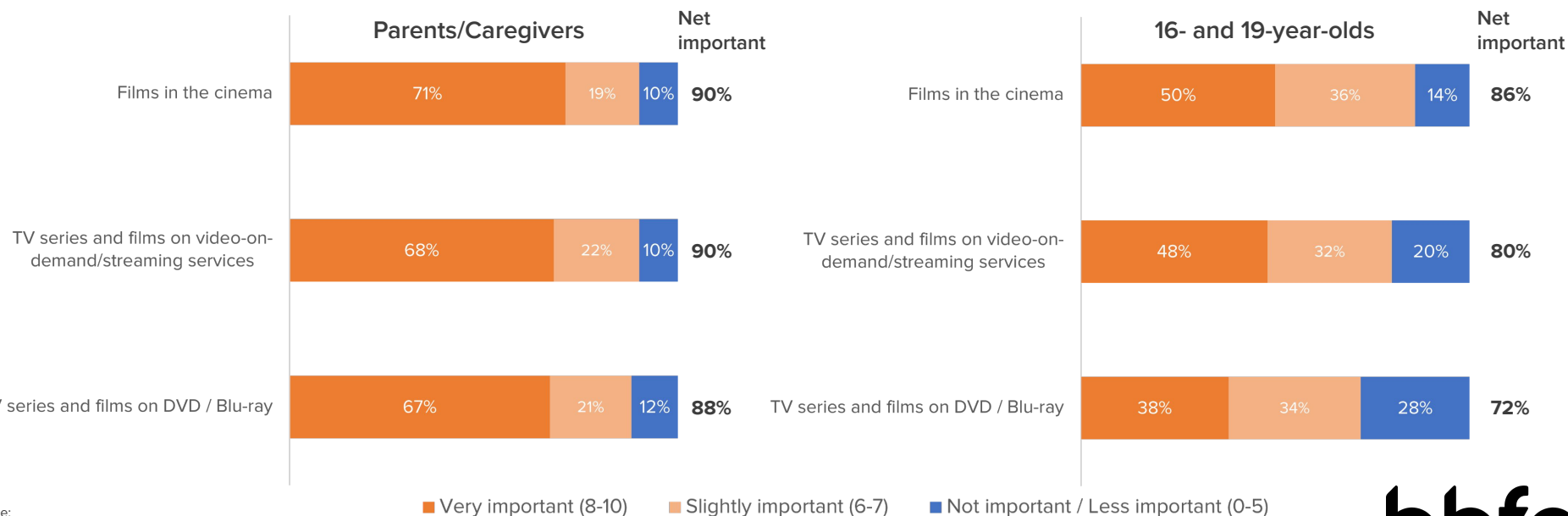
I4. To what extent do you agree or disagree with the following statements?

Base: 780

Base: 253

AGE RATINGS & CONTENT ADVICE ON VOD/ STREAMING SERVICES ARE AS IMPORTANT* AS FOR FILMS IN CINEMA

How important do you think it is for the following services to have age ratings/content advice?



PEOPLE WANT AGE RATINGS AND CONTENT ADVICE TO BE CONSISTENT ACROSS PLATFORMS

- **59%** of our sample (and **61%** of parents/caregivers of 4- to 15-year-olds) said that they would be concerned if each VoD/streaming service used different criteria when deciding the age ratings and content advice for their content.
- There is an assumption from the focus groups that age ratings and content advice are determined by a single body regardless of where the content is hosted.
- There was also a belief that age ratings and content advice were regulated by the government and were a legal requirement. People were surprised to learn this was not the case.

Would parents/caregivers/teens be concerned if VoD/streaming services used different criteria when deciding the age ratings and content advice of their content?



■ Yes ■ No ■ Not Sure

"I think it is a legal requirement, and I think it should be."

- Father of 5- and 8-year-old

"I think they [the government] should do it, I thought it was a legal requirement. It all feels a little shady, them [streaming services] doing it themselves."

- Mother of 6- and 1-year-old

PEOPLE WANT AGE RATINGS AND CONTENT ADVICE TO BE CONSISTENT ACROSS PLATFORMS

- The biggest concern (**53%**) cited if ratings are inconsistent was that children would be exposed to inappropriate content, followed by the risk of an erosion of trust in age ratings generally.

| Why would parents/caregivers/teens be concerned if VoD/streaming platforms each use a different criteria when deciding the age ratings and content advice for their content? | |
|--|---|
| 1. | Children may see content that is not appropriate for them (53%) |
| 2. | It makes age ratings and content advice less reliable (48.1%) |
| 3. | It is confusing for users if each platform takes a different approach (46%) |

| What do parents/caregivers/teens think are the potential risks to children if films and TV series are not appropriately age-rated on VoD/streaming platforms? | |
|---|---|
| 1. | They might see and copy anti-social behaviours – e.g. drug misuse, sexual violence, violence (64%) |
| 2. | They might see and copy dangerous behaviours – e.g. self-harm, suicide (59.8%) |
| 3. | They might learn about difficult subjects at too young an age – e.g. sex, discrimination, racism, mental health (57.3%) |

ATTRIBUTES MOST IMPORTANT FOR PROVIDERS OF AGE RATINGS/CONTENT ADVICE

| If there were one body responsible for age ratings and content advice for streaming/VoD content in the UK, what would be their most important features? | | |
|---|---|----------------------|
| 1. | Their standards and practices are publicly available and easy to understand | <i>"Transparent"</i> |
| 2. | They are independent from the platforms | <i>"Independent"</i> |
| 3. | They update their standards and practices in line with changes in society | <i>"Current"</i> |
| 4. | They reflect the views and concerns of audiences in the UK | <i>"British"</i> |

INSIGHT FROM THE FOCUS GROUPS

Transparent and research-based

- Age ratings and content advice should be informed by research and interactions with UK audiences.
- Research on public perceptions and opinions should feed into any decisions; it is important to listen to many views, not just the opinions of a few.
- Guidelines that inform decisions on classification should be open to the public and easy to understand.

Independent

- Parents/caregivers cited independence as a key attribute – including being independent of the government, as well as independent of the content producers.

Current

- Parents and teens alike felt that standards should be updated in line with changes in society. Teens placed even greater importance on this.
- All participants agreed that standards and practices should be fluid in order to accurately represent societal views.

British

- Parents want age ratings and content advice to reflect UK sensibilities.
- Many of those we spoke to felt that an international standard would be unachievable due to cultural differences between nations, and that they would rather see age ratings/content advice reflect UK sensibilities.

QUALITATIVE TOPLINE

"I would have more trust seeing any of these symbols [BBFC] than the others."

- Mother of 6- and 1-year-old

"No one likes people making up their own age ratings. Films must have rules!"

- Father of 4-year-old boy

"I haven't checked it, but I would assume if it's a 12 here, and then in another place is a PG that would really cause alarm."

- Father of 8- and 11-year old

"I think there must be the same thing all around. There must be. There can't be different people giving out different 12s and different 15s."

- Father of 4-year-old boy

"This one pops up in cinemas [the BBFC logo]. Even when I was a kid, this is the one that pops out in films."

- Mother of 6- and 1-year-old

"Isn't it all regulated by one body?"

- 18-year-old boy

"I'd like to think so [that there is one consistent set of age ratings]"

- 17-year-old girl

"The more access we have [to VoD/streaming services], they should think about making it generic for everybody"

- Mother of 4-, 8- and 11-year-old

"I think they [age ratings] are a good thing because they protect younger audiences."

- 18-year-old boy

"Having it under one body is easiest for everyone."

- 17-year-old girl

"I remember them [BBFC age ratings] from when I was a kid. It sticks in your mind."

- Mother of 6- and 1-year-old

"I think it's very useful because at least you can have a conversation with your kids and say it's not appropriate for you or something... I trust them to be the right age. If it's saying it's 12 and above then I wouldn't let the kids watch it."

- Father of 7- and 11-year-old

"The more information you give, the better it is for me. If you tell me it's got adult content, even if you can tell me the kind of adult content... I think there is a benefit to that as well."

- Father of 6-, 8- and 10-year-old

IN SUMMARY

1. Age ratings and content advice are **relevant and helpful** for people, especially parents/caregivers; but they are important for teens as well, particularly when choosing content for younger people.
2. UK parents/caregivers consider age ratings and content advice to be **equally important on VoD/streaming services as they are in the cinema**.
3. UK families would **prefer BBFC age rating symbols** and content advice across all touchpoints, as they are seen as the most trustworthy and recognisable.
4. The majority of parents/caregivers would be **concerned if VoD/streaming services each used different criteria** when deciding the age ratings and content advice for their content.
5. People across all ages have **spontaneous recall for BBFC age ratings**.