

Protecting Audiences in an online world

Deliberative research report

Prepared for Ofcom

BY

KANTAR MEDIA | Custom

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1 Executive summary

1.1 Background to the research

Ofcom commissioned Kantar Media to conduct a series of deliberative research workshops with members of the public to understand **what people think of current protections for audio-visual (AV) content delivered on different platforms and on a range of internet connected devices**, and what **protections they consider they should have both now and in the future**.

Within this overall aim, the research sought to explore opinions towards protection and assurance options, namely: **standards protections**, **content information signposts**, and **access control tools**.

The figure below explains what was meant by each of these terms:

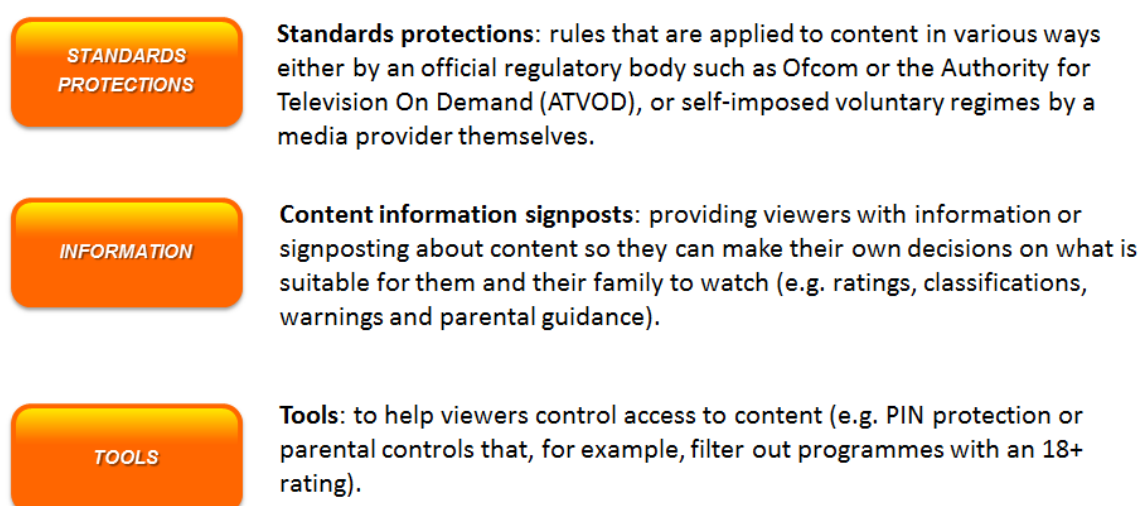


Figure 1: Summary – protection and assurance options

The specific objectives of the study were to:

- understand how consumer expectations of standards are shaped and determine expectations across content, platforms, brands, and devices;
- explore the role of content information in viewing decisions;
- explore the role of tools to control access to content; and
- inform a potential protection and assurance framework for the future, balancing content restriction and the personal responsibility of audiences.

This report is based on findings from a series of five four-hour deliberative workshops conducted across the UK, each of which had around 24 participants. Fieldwork took place in July and August 2014.

An analysis note – libertarians and protectionists

Throughout this report comparisons are made between two key attitudinal groupings that were identified within the research sample – *libertarians* and *protectionists*. The figure below describes some of the characteristics of participants with a more libertarian or protectionist viewpoint, with a fuller overview provided in sub-section 2.4. **For simplicity, we refer to these two cohorts as ‘libertarians’ and ‘protectionists’ throughout this report.**

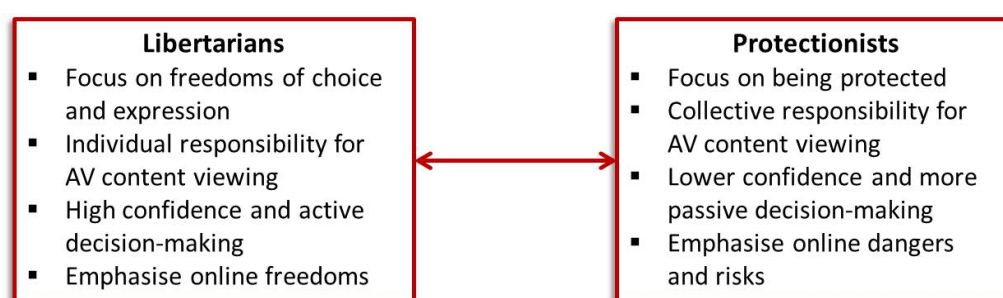


Figure 2: Summary – libertarians and protectionists

The libertarian and protectionist groupings have been qualitatively derived from participants' attitudes towards protections and assurance. **They have not been calculated through robust quantitative analysis.**

1.2 Summary of key findings

Audience behaviour and understanding

Viewing habits have changed in recent years, driven by the rise of connected devices, services and platforms, with variations in people's knowledge and understanding of the media landscape

The majority of participants reported changing viewing habits in recent years, with increased use of connected devices, services and platforms.

Younger (generally the under 35s) and more 'technology engaged' participants had the most detailed understanding of the current viewing landscape, and were most familiar with the variety of viewing options available beyond traditional broadcast viewing.

The TV set remained the focal point of household viewing, but younger participants were most likely to use games consoles, tablets or laptops as alternatives.

Brands helped shape content expectations, with the majority of participants placing greatest trust in established broadcast brands such as the ‘five main channels’.

Understanding and perceptions of current regulation

Regulation of AV content was considered to be highly important, yet there was limited understanding of how regulatory arrangements vary by viewing platform

Overall (not focusing on a specific device or platform) the vast majority of participants thought that the regulation of AV content was highly important.

The majority of participants had a very limited understanding of the current regulatory landscape, and particularly of how regulation varies by viewing platform. However, there was broad understanding that the internet generally was not a protected or regulated environment.

Devices: importance and expectations of protections

The research explored participants’ expectations and perceived importance of regulation across a range of devices, drawing on uninformed discussion before participants were briefed on existing regulation and protection frameworks.

The regulation of TV sets was perceived as most important

The majority of participants agreed that the often passive nature of TV viewing and potential exposure to inappropriate content meant that TV sets should be highly regulated, in particular, to protect minors and vulnerable individuals.¹

The regulation of more personal devices, such as smartphones and tablets, was considered less important as they were associated with more active viewing choices

By contrast, the majority of participants, and particularly those of a libertarian viewpoint and the more technology engaged, attributed slightly lower importance ratings to the regulation of more personal devices such as tablets and smartphones, with viewing requiring a more active choice.

Similarly, participants also considered the regulation of laptops and desktop computers to be less important than TV sets due to the more active choice of viewing involved. Games consoles were also perceived as relatively less important when compared to TV sets, with many participants failing to immediately recognise their role in delivering AV content.

¹ Smart TVs were also included as part of this finding, but the majority of participants considered smart TVs as devices used to view broadcast content rather than catch-up, on-demand or other internet services.

However, the perceived importance of regulating ‘personal’ devices increased when participants reflected on instances where they could be used by children viewing content unmonitored on private devices or via games consoles away from the main living room.

Views on the regulation of connected devices were influenced by participants’ levels of technological aptitude and confidence

Participants with lower levels of technology engagement were more likely to attribute higher importance to the regulation of connected devices given their relative lack of technical aptitude and confidence. Contrastingly, participants with high levels of technology engagement deemed the regulation of connected devices to be less important, and were more confident in using access controls as an alternative to, or as a means of supplementing, standards protections.

Platforms: importance and expectations of protections

This section investigated participants’ expectations and perceived importance of regulation across a range of platforms, based on uninformed discussion about existing regulation and protection frameworks.

The regulation of broadcast TV was considered most important

Reflecting the discussion on devices, the majority of participants rated the regulation of broadcast TV as most important in light of the shared nature of viewing and the often passive choice of scheduled broadcast content. The vast majority of participants perceived broadcast TV as being generally safe, with perceptions founded on previous experience and the presence of well-established channel brands. For the majority of participants, brand perceptions extended beyond broadcast meaning people expected brands to retain the same quality standards regardless of method of delivery or point of access.

Most participants expected catch-up TV to be regulated to a similar standard as broadcast TV

Most participants wrongly assumed that catch-up programming was subject to the same regulatory standards as broadcast TV because the content had previously been broadcast.

However, perceptions of the regulation of on-demand and other internet content varied amongst the participants

There was broad understanding that the internet generally was not a protected or regulated environment. However, participants’ views on how this might be addressed varied widely. The more libertarian participants stated that on-demand services should not be as highly regulated as broadcast TV in light of the active choices made by viewers. Conversely, those of more protectionist

viewpoints associated on-demand services with TV-like content and thought that regulation was highly important.

For the vast majority of participants, regardless of their broader social attitudes, the greatest concern with other internet content centred on protecting children and vulnerable individuals from viewing unsuitable content. Protectionists favoured content standards as the most effective means of protecting people online, while libertarians were more likely to cite access controls as the best means of protecting vulnerable individuals yet still preserving online freedoms.

However, many participants – protectionists and libertarians alike – expressed doubts over the practical feasibility of offering meaningful protection and assurance online due to the vast volume of AV content and the international origin of services.

Content standards: importance and expectations

Participants were asked about the perceived importance and expectations of the following regulatory areas: protection of minors; hatred; accuracy in news; privacy; fairness; consumer protection (harm); impartiality, and offence. Consideration was also given to the platform content is shown on and which means of protection (i.e. standards protections, information, or tools) were considered most appropriate for addressing the issues involved.

The protection of minors was considered the most essential area for protection and assurance

There was universal agreement that the protection of minors was the most important area for protection and assurance. Hatred and accuracy in news were also consistently perceived as extremely important across broadcast TV, catch-up, on-demand, and other internet viewing.

Protection of minors was the only standards area where participants expected protections from all available protections options: content standards protections, information signposts, and tools.

Participants placed higher importance to each of the content standards areas discussed in relation to protections on the broadcast TV platform.

Content information signposting: importance and expectations

This section examined participants' awareness and attitudes towards content information, including the importance of the various information types. The research explored opinions on information signposts such as warnings about content, age ratings, classifications, and parental guidance.

Content information was recognised as important in guiding viewing decisions, yet did not provide complete assurance when used in isolation

The vast majority of participants attributed very high importance to content information as a protection mechanism. Across all the participant sub groups, content information was recognised as important in guiding viewing decisions particularly where more vulnerable individuals may be watching. Moreover, the majority considered content information to be very important for catch-up and on-demand services that do not adhere to a watershed. Nonetheless, the majority of participants said that content information did not offer sufficient protection when used in isolation.

Access tools: importance and expectations

Participants' awareness and attitudes towards access control tools were also examined, including the importance of the various tools under discussion. The research explored opinions on access tools such as PIN protections, programme scheduling, technical controls and availability of channels on the electronic programme guide (EPG).

The awareness of and confidence in access tools was highest amongst younger and more technology engaged participants

The vast majority of participants gave high importance ratings to the tools discussed and the majority of participants recognised the potential use of tools in restricting children's and other vulnerable individuals' access to potentially inappropriate content. Tools were viewed by parents as especially important for connected services and other internet content due to a relative lack of existing regulation and the challenges of directly monitoring children's viewing on such platforms.

Younger and more technology engaged participants were most likely to strongly advocate tools, as a result of their high levels of technology aptitude and confidence. Older participants (generally those aged 35+) tended to have less confidence in using tools, and feared that children with higher levels of technology aptitude could easily circumvent them.

The vast majority of participants noted that tools were not enough in isolation, and information was required to guide which content items were controlled with tools.

Protection and assurance in the future

The final section examined participants' considered responses to the future of protection and assurance. Participants discussed a selection of future scenarios, which introduced varying levels of protection across broadcast TV, catch-up, on-demand, and other internet viewing.

There was broad agreement that broadcast TV should continue to be regulated to a high standard in the future

The vast majority of participants – protectionists and libertarians alike – thought that the regulation of broadcast TV was highly important and they wanted this to continue in future.

There was consensus amongst the majority of participants that catch-up should be regulated to the same high standards as broadcast TV

Many protectionists perceived catch-up as already being subject to the same regulatory standards as broadcast TV as the content had already been broadcast. The vast majority of protectionist participants therefore thought that catch-up content should be regulated to the same high standards as broadcast TV.

The majority of libertarian participants also favoured increasing the level of catch-up regulation to match the standards of broadcast TV. For many libertarians, an increase in catch-up regulation was seen as matching current perceptions of the current level of regulation, rather than actually requiring an increase.

The regulation of on-demand proved more divisive, with protectionist viewpoints favouring increased regulation and libertarian viewpoints defending the status quo

The vast majority of protectionist participants thought that an increase in the level of catch-up regulation was a small step forward, and they thought that on-demand content should also be regulated to the same standards. Many of the protectionists who advocated increased on-demand regulation likened the content available on those services to that provided on catch-up services.

By contrast, the majority of libertarian participants had concerns over the increased regulation of on-demand services, which was seen as an unwelcome departure from the status quo. These predominantly young (under 35), male and highly technology engaged participants associated on-demand services with an active, informed choice to view.

The future regulation of other internet content was the most contentious area with libertarians defending online freedoms and protectionists viewing increased regulation as a priority

The future regulation of other internet content triggered the strongest debate between libertarian and protectionist participants. The protectionist participants emphasised the risks of other online AV content and sought increased regulation, whilst the libertarians espoused online freedoms, such as free and active choice, and were wary of third-party intervention that could restrict content access.

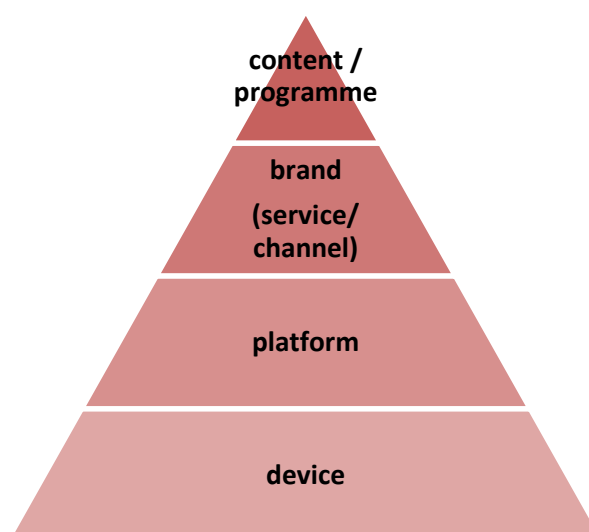
Nonetheless, across all participants, doubts were raised over the practical feasibility of effectively regulating other internet AV content. Doubts centred on the sheer volume of AV content available online, which could make the regulatory task almost impossible. Several participants also noted the additional challenges created by the international origin of other online AV content.

2 Background and objectives

2.1 Background

The media landscape continues to evolve as technologies develop. In the past television was broadcast to a mass audience by just a handful of channels. The world of television is now radically different. With digital switchover complete across the UK, there is now a multitude of channels available. While most viewing continues to be linear and delivered by the traditional broadcasters, catch-up and on-demand services allow more choice of what and how to watch programmes and content. There are now many services that provide easy access to programmes beyond linear schedules, and a range of different platforms and devices, offering comfort and convenience, for example:

- Service providers enable audiences to view what they want when they want: for example, catch-up players such as BBC's iPlayer, ITV Player, 4oD, Demand 5, and Now TV, as well as on-demand services like Netflix, Blinkbox and Amazon Prime Instant Video (previously LOVEFiLM Instant)
- Satellite, cable and internet platforms provide different ways of receiving content: Sky, Freesat, Virgin Media, YouView, YouTube, BT TV, TalkTalk, iTunes, Twitter, Facebook
- There are also now many ways to watch television content, both around the home and when out-of-home, using different devices: connected/smart TV sets, PCs (desktop/laptop), tablet computers, smartphones, games consoles, set-top boxes



Thus, in the digital age, there are several layers operating when someone watches a programme/content (as summarised in the diagram above), each of which contributes to some extent towards expectations about the content consumed.

With digital blurring the boundaries between different content providers and platforms, the role of regulation to protect audiences from potentially harmful or inappropriate material in a converging world has become more challenging. There are different regulatory frameworks that apply to

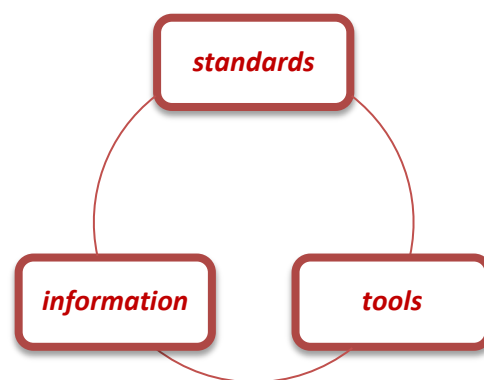
different types of service, but these are not necessarily aligned with consumer expectations of the audio-visual (AV) content to which they have access. While many of these issues were investigated in a research study in 2011², the market has developed significantly since then and there is now a need for a new qualitative study. This report details the findings of the new research.

2.2 Research objectives

The overall aim of the research was to understand what people think of current protections for AV content delivered on different platforms and on a range of internet connected devices, and what protections they consider they should have both now and in the future. Within this overall aim, the research sought to explore opinions towards protection and assurance options, namely: standards protections, content information, and access control tools.

There are three main ways to provide protection and assurance:

- *Standards* protections, which, for example, can be delivered through the Ofcom Broadcasting Code and the Authority for Television On Demand (ATVOD) rules, and voluntary regimes
- *Content information signposting* about the content (e.g. ratings, classifications, warnings and parental guidance)
- *Tools* to control access to the content (e.g. parental locks, PINs, the watershed)



The specific objectives of the study were to:

- understand how consumer expectations of standards are shaped and determine expectations across content, platforms, brands, and devices;
- explore the role of content information in viewing decisions;
- explore the role of tools to control access to content;
- inform a potential protection and assurance framework for the future, balancing content restriction and personal responsibility; and
- understand the balance between personal freedoms versus the need for protection and assurance.

² <http://stakeholders.ofcom.org.uk/market-data-research/other/tv-research/protecting-audiences/>

2.3 Our approach

Overview

A multistage programme of qualitative research centred on deliberative workshops was devised to best meet the research objectives.

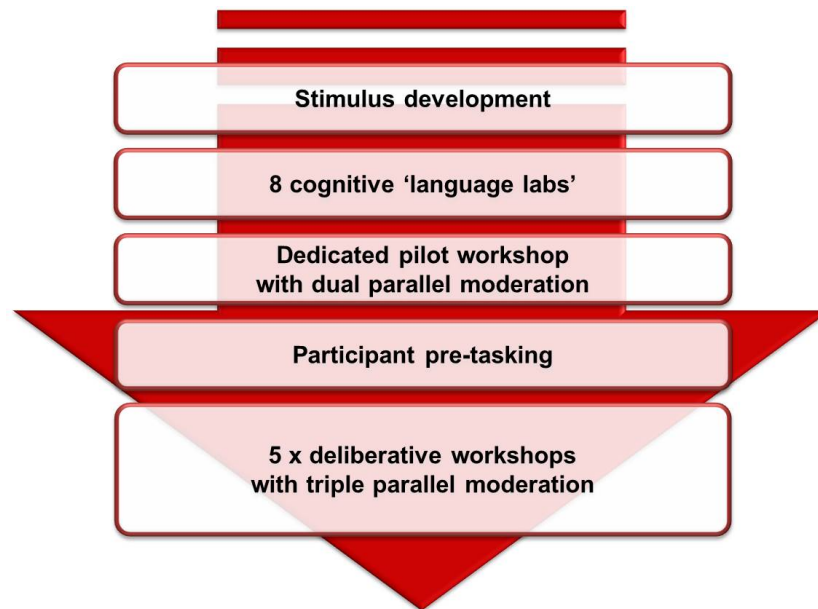


Figure 3: Research design overview

The research was founded on the development of a range of user-friendly stimulus materials, which helped inform participants in a complex topic area. The research materials were tested for comprehension and usability through a series of cognitive interviews (or 'language labs'). A pilot workshop was conducted to further test the materials in a group setting. Ultimately, a series of 4-hour deliberative workshops were conducted across the UK. The deliberative approach provided sufficient time to inform participants about the complex issues under investigation, whilst generating a large sample size to ensure that a broad cross-section of views were captured. An overview of the main workshops stage is provided below, with details of the sample design and discussion flow and tasks. Appendix A includes more details of the stimuli development, cognitive testing and piloting.

Main workshops – overview and sample

A series of deliberative workshops comprised the core of the research fieldwork. The deliberative approach allowed participants to be informed about the complex issues under investigation, whilst providing sufficient time for discussion and consideration. In addition to the pilot workshop, a series of 4-hour deliberative sessions were conducted across the UK. The sample for the deliberative workshops is summarised below:

Table 1: Deliberative workshops sample matrix (c.120 participants in total)

| | Location | Age band | Parents / non-parents | Life stage | SEG |
|---|-----------|--|---|--|---------|
| 1 | London | 25-34 12 aged 25-29 12 aged 30-34 | 8 x parents (25-29) 8 x parents (30-34) 8 x non-parents (25-34) | Mix of pre-family, single, young couples, young families | ABC1 |
| 2 | Edinburgh | 16-24 8 aged 16-17 8 aged 18-21 8 aged 22-24 | 8 x non-parents (16-17) 8 x non-parents (18-21) 8 x non-parents (22-24) | Mix of pre-family, single, young couples | BC1C2 |
| 3 | Leeds | 55+ 8 aged 55-64 16 aged 65+ | 8 x parents (55-64) 8 x grandparents (65+) 8 x non-parents (65+) | Mix of older families, empty nesters/retired | C1C2D |
| 4 | Cardiff | 16-34 8 aged 16-17 8 aged 18-24 8 aged 25-34 | 8 x non-parents (16-17) 8 x non-parents (18-24) 8 x parents (25-34) | Mix of pre-family, single, young couples, young families | AB C1C2 |
| 5 | Belfast | 35-54 12 aged 35-44 12 aged 45-54 | 8 x parents (35-44) 8 x parents (45-54) 8 x non-parents (35-54) | Mix of young families, older families | C2DE |

Note: Deliberative workshops fieldwork conducted from Wednesday 23rd July to Wednesday 6th August 2014

The workshops were split by age range to encourage constructive group dynamics amongst those of similar life stages. Each workshop was made up of around 24 participants, with a mixture of plenary (all participants) and parallel syndicate (breakout) group sessions. The plenary sessions were mainly used for debrief presentations to provide key information to participants, with syndicates used for detailed discussion around protection and assurance.

The syndicate groups were structured around parents and non-parents, within tightly defined age ranges. Socio-economic group (SEG) was also a variable used for recruitment. Each workshop comprised an even split of both high and low technology engagers, and those with different attitudes towards the role of government and public institutions in people's lives³. Details of the session flow and tasks are provided in the section below.

Deliberative workshops – discussion flow

The table below summarises the workshop discussion flow, outlining where participant briefings were included and tasks set.

The deliberative approach captures **uninformed** feedback from participants at the outset, before progressing to **informed** discussion following briefing presentations and, ultimately, **considered**

³ A bi-polar question was asked: Which of the following statements best describes your outlook? 1) The government and public institutions should play a minimal role in our lives, and people should be free to make their own choices and decisions 2) The government and public institutions should play an active role in looking after people as they are better equipped to make certain decisions on peoples' behalves.

responses to future protection and assurance. Copies of each of the debrief presentations and tasks are provided in the report appendices.

Table 2: Deliberative workshops discussion flow and tasks (duration 4 hours)⁴

| Stage | Topic and tasks | Time | Setting |
|-----------------|--|---------|-----------|
| UNINFORMED ↓ | 1. Introduction to workshop • Self-completion questionnaire 1: Importance of regulation overall, by platform, and by device. Awareness & importance of content information and tools. | 15 mins | Plenary |
| | 2. Warm-up and context setting • Discussion of viewing habits – content, devices, services and platforms used - drawing on diary pre-task • Timelines exercise: exploring changes in viewing habits over the last 2 years • Mapping exercise: Grouping exercise, sorting similar cards from a selection of brands, channels, platforms, devices, and services | 20 mins | Syndicate |
| | 3. Informing participants about ways of accessing content • Briefing presentation on current viewing landscape and recent changes • Ensuring knowledge of how AV content can be accessed across various devices, platforms, and services | 20 mins | Plenary |
| | 4. Exploring perceptions of regulation and protection • Expectations of content by device and brand • Discussion around examples of offensive/objectionable content encountered by participants and any actions taken • Quiz: Rapport building and further introduction to today's viewing landscape, including questions on regulation • Awareness and perceptions of current regulation | 25 mins | Syndicate |
| INFORMED ↓ | 5. Informing participants about current protection and assurance • Briefing presentation on how viewers are currently protected • Self-completion questionnaire 2: Importance of regulation overall, by platform, and by device. Importance of content information and tools. | 20 mins | Plenary |
| | BREAK | 10 mins | |
| | 6. Expectations of protection and assurance • Discussion around usage & attitudes towards standards protections, content information, and tools • Consideration of a range of scenarios (5-10 mins per scenario) to further explore the role of standards protections, information and tools (and UK law), across different devices and platforms • Self-completion questionnaire to gauge importance of regulatory areas by platform | 80 mins | Syndicate |
| CONSIDERED ↓ | BREAK | 10 mins | |
| | 7. Future protection and assurance • Recap on standards protections, content information and tools • 'You're in charge' task: Groups split into teams to develop visions for the future of protection and assurance • Future scenarios presented, discussed, and evaluated • Individual rankings of future scenarios • Self-completion questionnaire 3: Importance of regulation overall, by platform, and by device. Importance of content information and tools. | 30 mins | Syndicate |
| | 8. Learnings and advice • Regroup for final considered views | 10 mins | Plenary |

⁴ The full discussion guide is provided in Appendix B

2.4 An analysis note – libertarians and protectionists

Throughout this report comparisons are made between two key attitudinal groupings that were identified within the research sample – *libertarians* and *protectionists*. The figure below describes some of the characteristics of participants with a more libertarian or protectionist viewpoint. **For simplicity, we refer to these two cohorts as ‘libertarians’ and ‘protectionists’ throughout this report.**

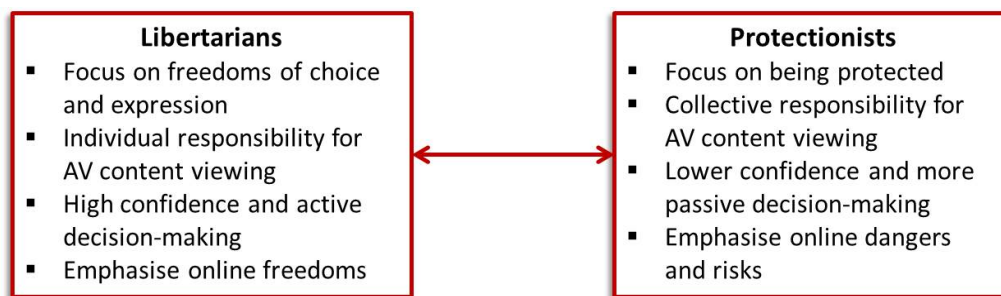


Figure 4: Summary – libertarians and protectionists

The libertarian and protectionist groupings have been qualitatively derived from participants' attitudes towards protections and assurance. **They have not been calculated through robust quantitative analysis.**

Those participants with a libertarian viewpoint were characterised by their focus on freedoms of choice and expression. Moreover, they strongly advocated personal responsibility, with individuals free to actively shape their own viewing choices. The libertarians were more likely than the protectionists to have high levels of technological aptitude, and this was reflected in their confidence in making informed viewing decisions across various devices and platforms.

By contrast, the protectionists were characterised by their principal focus on collective protection of viewers rather than safeguarding individual freedoms of choice. The protectionists were more likely to advocate third-party intervention to offer protection from potentially harmful and inappropriate content. In addition, protectionists were often less engaged with emerging AV technology, and were therefore less confident in making viewing decisions across various devices and platform. As a result, protectionists were more likely to concentrate on the risks of passively encountering inappropriate or objectionable content rather than the benefits of active choice.

The opinions of libertarians and protectionists diverged most starkly with regards to online AV content. Libertarians associated online AV content with broader online freedoms, and concentrated on active viewing choice. By contrast, protectionists emphasised the risks and dangers of online AV content and the need to protect outweighed considerations of freedoms.

A more detailed picture of the libertarians and protectionists is built up throughout this report.

3 Audience behaviour and understanding of the media landscape

3.1 Introduction

This chapter explores existing audience behaviour and understanding of the media landscape, drawing on pre-task responses and ‘uninformed’⁵ discussions in workshops. Firstly, the chapter explores participants’ current viewing habits and their awareness and usage of various services, platforms and devices. Secondly, it investigates the role of brands in shaping participants’ content expectations. Finally, participants’ current content concerns are discussed with reference to their pre-task contributions.

3.2 Summary of key findings

- The majority of participants reported changing viewing habits in recent years, with increased use of connected devices, services and platforms.
- Younger (generally those under 35) and more ‘technology engaged’ participants had the most detailed understanding of the current viewing landscape, and were most familiar with the variety of viewing options available beyond traditional broadcast viewing.
- The oldest (those aged 65 and over) and the less technology savvy participants had also broadened their viewing repertoires in recent times, in response to developments like digital switchover and multi-channel television.
- The TV set remained the focal point of the household, but younger participants were most likely to use games consoles, tablets or laptops as alternatives to viewing.
- Brands helped shape content expectations, with the majority of participants, particularly the older and less technology engaged, placing greatest trust in established broadcast brands such as the ‘five main channels’.
- Younger participants, and particularly non-parents, were the least likely to say they have taken offence at content, with many claiming they have become ‘desensitised’ due to their broad exposure to a variety of AV content across a range of platforms and devices.
- Younger participants sought more immediate forms of providing feedback on content such as via social media channels like Twitter.

⁵ Before stimulus materials were discussed.

3.3 Changing viewing habits

Participants completed an AV content viewing diary before attending the workshops to build awareness of existing viewing habits. The viewing diary required participants to chronicle what they had watched, when they had watched it, and what services, platforms, and devices were used. In the workshops, participants discussed what they had observed about their viewing habits, and explored how their habits of today compared with previous viewing.

Participants found completing the viewing diaries to be very revealing and were often surprised by their current habits. Many were struck by the routine nature of their viewing, with content watched at similar days and times across the diary period. The majority of participants noted how their viewing habits had changed in recent years, following the emergence of a variety of connected devices, and catch-up and on-demand services. The oldest participants (those aged over 65), and the less technology engaged, indicated that they are now viewing of a greater range of free-to-air channels as a result of the developments of digital switchover and multi-channel television.

TV sets remained the focal point of household viewing, with the majority of participants favouring TV sets for watching content with others and for watching event TV (e.g. live sports events, reality TV show finals, etc.). However, the viewing dairies revealed that a majority of participants, and particularly the younger and more technology engaged, were using connected devices either in conjunction with TV sets, or as an alternative to TV sets, as explained below.

"If the TV is on that's actually sports, that's the only live TV I watch any more. Everything else I watch on Netflix. It's just easier." (Male, 21-24, non-parent, Edinburgh)

"If I am watching TV I am not just watching TV. I am either playing a game and watching TV or texting or watching TV or doing homework and watching TV. It is never just...I can't sit there and just watch TV, I just can't, it is unbearable." (Male, 16-17, non-parent, Cardiff)

The younger participants, especially those under 25, were most likely to be using games consoles, tablets, or laptops as alternatives to viewing the main TV set in the living room. Younger participants explained this as allowing them to watch content of their choice at a time of their choosing, rather than having to fall within broader family tastes.

"If they [my parents] are not into a series you would catch up on it. I will go into my room and watch it because they won't tolerate it. It is like a majority decision, like if you want to watch something and they don't, it is just more convenient" (Female, 16-17, non-parent, Cardiff)

Parents also recognised that children were increasingly viewing content on connected devices, and issues around the challenges of monitoring children's viewing emerged.

"How do you tell a child on his iPad in his bedroom you can't watch the catch-up that's free? How do you police that? They've gone up on the iPad, they've got up onto the iPlayer and they're watching something that's broadcast at 11 o'clock at night and they're only 10. How do you do that?" (Female, 55-64, non-parent, Leeds)

Many participants reported increasing use of catch-up and on-demand services to shape viewing around their busy lives. They felt freed from broadcast TV schedules, with catch-up, on-demand, and personal video recorder (PVR) services being used to watch content at a time of convenience. Parents were using connected services to watch content at convenient times around family routines, whilst many participants were using on-demand and recording services to 'binge watch' their favourite shows.

"I like binge watching I think. I'm watching things one after the other." (Female, 25-29, parent, London)

Participants perceived technology changes as broadly beneficial to their viewing habits, yet many recognised an increasingly confusing array of services, platforms, and devices. For example, many were unaware of the potential uses of a smart TV and its ability to access online AV content. Moreover, participants who owned smart TVs had often purchased a new TV set and failed to consider or fully understand the range of content provided through internet connected functions. The older and less technology savvy participants were most likely to say that they feel overwhelmed by the advance of viewing technology.

Amidst an expanding array of increasingly interconnected AV devices, services and platforms, discussion progressed to implications for content expectations and audience protection.

3.4 The role of brands

Mapping the viewing landscape

Participants were asked to group similar brands and items from a large selection of cards featuring brand names, logos, and images. The mapping exercise was conducted before participants were briefed on how content is consumed today and tapped into uninfluenced, existing perceptions of the AV landscape. This research technique was used to uncover peoples' understanding of the media landscape. The diagram below summarises the most frequent groupings across the workshops.

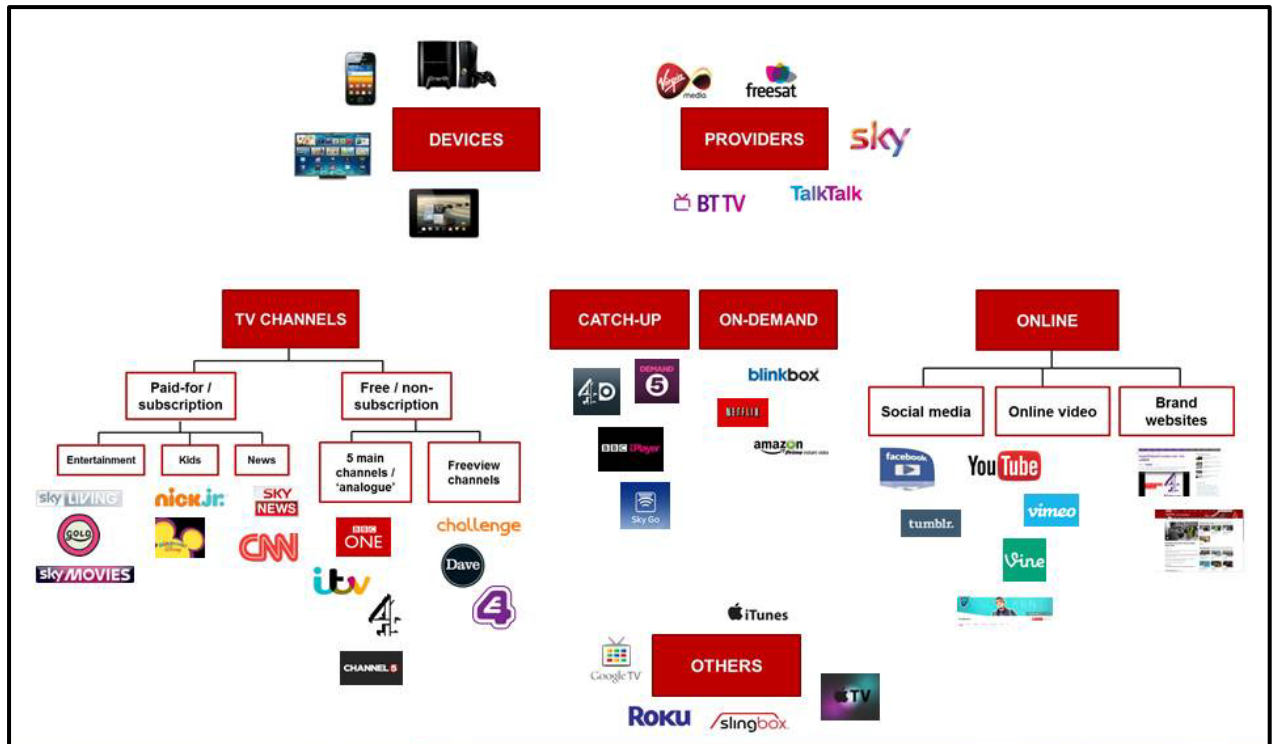


Figure 5: Summary of common 'mapping exercise' groupings

The vast majority of participants sorted items by function rather than by brand, illustrating a broad understanding of the current viewing landscape. For example, 'Freeview/non-subscription' channels (e.g. Dave, Challenge, E4, ITV2, BBC Four, etc.) were grouped together rather than grouping items by specific brand or channel 'family' (e.g. BBC One, BBC Two, BBC Three, BBC Four, BBC YouTube Channel, etc.). Similarly, participants grouped devices (e.g. smartphone, games console, TV, etc.) and 'providers' (e.g. Sky, Virgin Media, BT TV, etc.) together rather than, for example, grouping all Sky brand items together.

The younger (generally the under 35s) and more technology engaged participants were most likely to arrive at a greater number of more detailed groupings. The more detailed groupings stemmed from younger participants having greater familiarity with, and greater understanding of the AV landscape outside of broadcast TV. In particular, younger participants were more likely than the

older and less technology engaged to recognise the online and social media focused brands under consideration.

Conversely, the older participants were more likely to identify fewer groupings, in line with their lower awareness of several of the more online and social media brands. The older participants were also likely to have a larger grouping of 'miscellaneous' items that they were unable to incorporate within other groupings due to their lack of awareness. The 'miscellaneous' items often included brands that older participants were completely unaware of (e.g. Roku, Slingbox), alongside specific products from well-known brands that they were unfamiliar with (e.g. Apple TV, Google TV). In addition, the older and less technology engaged participants were less likely to group items and brands by separate catch-up and on-demand categories. Whilst the majority could describe the differences between well-known catch-up and on-demand services (e.g. the differences between BBC iPlayer and Netflix), the terms 'catch-up' and 'on-demand' were often used interchangeably. By contrast, younger participants were more likely to make an unprompted distinction between catch-up and on-demand services in their groupings.

The role of brands in influencing content expectations

Building on the mapping exercise, it became apparent that participants' expectations of suitability of content were influenced by the brands involved. For many participants, it appeared that familiar brands helped shape viewing choices in line with their existing perceptions and expectations. The majority of participants were more likely to trust content from a familiar brand, and have a good sense of content that would or would not be suitable for children or other vulnerable individuals.

The majority of participants, particularly the over 35s, reported a greater sense of safety with the "5 main channels" or "analogue channels". The older participants had broad experience of the '5 main channels' and held expectations of the type of content broadcast by each. For example, the majority of participants considered the BBC to be the safest environment for viewing, while Channel 4 and Channel 5 were associated with more risky or edgy content.

"With something like BBC you wouldn't expect something like South Park on there, which could cause possible offence, as you would expect it on other channels which you get abuse on." (Female, 16-17, non-parent, Cardiff)

Going beyond the '5 main channels' but retaining a focus on the brands, the more technology engaged participants were most likely to have different content expectations across the channel families. For instance, several participants associated ITV 2 with content aimed at adults, compared to the flagship ITV channel. Nonetheless, with regards to the BBC, most participants appeared to

carry the same expectations from broadcast BBC channels to the catch-up iPlayer service. Overall, participants' familiarity with the '5 main channels' was valuable in helping shape viewing decisions for themselves and their family members.

The majority of participants generally had high expectations of content provided by major brands, and especially content delivered by well recognised broadcast brands. Many thought that major brands would be unlikely to show particularly controversial content due to fears over potential reprisals. By extension, the bigger brands were seen to have more of a reputation to protect and more to lose by showing inappropriate or objectionable content.

"Because it is your name. It is your reputation, if you are the BBC you want to make sure you get it right because the last thing you want to do is have your name dragged through the mud. You know, take the News of the World for example, that whole debacle." (Male, 30-34, parent, London)

Participants' brand expectations for online content will be explored in detail in Section 6 'Platforms'.

3.5 Existing content concerns

This section explores participants' current content concerns, drawing on their individual responses and uninfluenced discussions prior to the workshop briefing on current protection and assurance. Participants were asked in the pre-task to provide examples of any AV content that they had encountered and considered to be inappropriate or objectionable, along with any actions they had taken as a result. The discussion below summarises existing content concerns and is split by broad life stage groups to highlight how attitudes towards inappropriate or objectionable content varied by age.⁶

⁶ For context to this sub section it is useful to note that quantitative data from Ofcom's Media Tracker 2013⁶ indicates that around a fifth (18%) of adult viewers said they had been offended by something on TV in the previous 12 months. Younger people were less likely than older people to say they had been offended (11% among TV watching 16-34s compared to 29% among TV watching over-65s). Among those offended, bad language (47%), violence (39%) and sexual content (39%) were the most common causes of offence.

Across the life stages, many participants expressed concerns over the expectations set for young people by reality TV. In addition, participants frequently cited issues surrounding over-sexualised imagery and adult themes in music videos.

Young non-parents

Younger participants, and particularly non-parents, were the least likely to say they have taken offence at content. Many claimed to have become 'desensitised' to content that could be considered shocking due to their broad exposure to a variety of AV content across a range of platforms and devices. Younger participants were most likely to have a negative image of those who do complain about content, perceiving them as older and having 'too much time on their hands'. By contrast, younger participants sought more immediate forms of providing feedback on content such as via social media channels like Twitter.

"Being a single guy and growing up with the internet, I wonder what classifies as 'offensive' in this day and age? Can't say I've seen anything I'd consider 'offensive' through the 'legal' channels and appropriate websites." (Male, 25-34, non-parent, London)

"If I felt very strongly against a programme and felt it was on at an inappropriate time, I would Tweet or change channel as opposed to writing a formal email." (Female, 25-34, non-parent, London)

News content also emerged as an area of concern for young participants, with the real world seen as potentially more shocking than fictional content. The younger participants (including both parents and non-parents) highlighted issues with graphic news content and also instances where news coverage could be perceived as biased.

As with the other life stages, several of the young non-parents expressed concerns regarding over-sexualised content in music videos. In particular, these participants expressed fears that over-sexualised and adult-themed content in music videos set a poor example and expectations for young people.

Younger parents

Amongst younger parents (broadly those under 35), the majority reported taking little personal offence at AV content consumed. However, younger parents were more likely to be worried about their children viewing potentially inappropriate content. They identified the watershed as a key tool in determining what broadcast TV content was suitable for children to view. Looking beyond

broadcast TV, however, many young parents recognised the dangers of children accessing inappropriate AV content – in particular, graphic content – through other internet channels, such as social media or video sharing sites. The value of access tools was noted by the majority of young parents, but they were used alongside educating children about the dangers of inappropriate content.

“I find with more and more channels available, content that might be inappropriate for children is becoming more readily available at times that they can access (i.e. pre-watershed), be it music videos, re-runs of programmes, etc.” (Male, 30-34, parent, London)

“[Likely actions if inappropriate AV content encountered]...turn it off, Tweet, [and] talk to my children if I felt they needed an explanation.” (Female, 25-34, parent, Cardiff)

Older participants

The older participants, both parents and non-parents, were most likely to have reported taking offence at AV content. Nevertheless, rather than complain, the majority of older participants claimed that they would simply stop viewing or change channel. Older participants had greatest concern about the prospect of children being exposed to inappropriate content. They were most likely to be the least technology engaged and, whilst access tools were considered potentially useful for younger children, there were fears that older children would have greater technical knowledge than them.

“I watched two programmes recently and even though I consider myself a broad/open minded person, found myself shocked at some of the content even though I knew what the programme was about and chose to watch it...maybe should have registered a complaint (though don’t know how to do that).” (Female, 45-54, parent, Belfast)

“I find many reality shows – especially Big Brother, Celebrity Big Brother, [and] I’m a Celebrity Get Me Out of Here – to be offensive...as they are all an insult to people’s intelligence.” (Female, 45-54, non-parent, Belfast)

4 Understanding and perceptions of current regulation

4.1 Introduction

This chapter explores participants' understanding of the current regulatory landscape both within and beyond the broadcast environment. Like the previous section, this draws on pre-task responses and uninformed discussions in workshops. It should be noted that regulation was not defined to participants at the outset of the sessions, and responses are based on their existing understanding of the term.

4.2 Summary of key findings

- The majority of participants had a very limited understanding of the current regulatory landscape, and particularly how regulation varies by platform.
- Most thought that broadcasters and content providers had a role in regulating content and would be an obvious point of contact should inappropriate or objectionable content be encountered.
- Overall (not focusing on a specific device or platform) the vast majority of participants thought that regulation of AV content was important.

4.3 Understanding of the current regulatory landscape

The majority of participants had a very limited understanding of the current regulatory landscape, and particularly how regulation varies by platform. Participants claimed that they had simply given very little detailed thought to the regulatory landscape. However, the majority of participants, particularly those aged 35 and over, were able to associate Ofcom with the regulation of TV, mainly due to mentions of Ofcom in TV programmes or elsewhere in the media.

"You always hear about Ofcom when someone is not happy." (Male, 35-44, parent, Belfast)

"I hear Ofcom on a lot of things. Like, if I watch a film they will say oh you can't do that ...on Top Gear I think they said we are being kicked off now because of Ofcom quite a few times." (Male, 16-17, non-parent, Cardiff)

By contrast, there was very little awareness amongst participants of ATVOD and its role in the regulation of on-demand content.

Most participants thought that broadcasters and content providers had a role in regulating content. Moreover, the majority felt that broadcasters would be an obvious point of contact should inappropriate or objectionable content be shown.

“The BBC will be the strongest regulator of all the channels.” (Male, 45-54, parent, Belfast)

A minority of participants misunderstood how the regulatory process worked, and assumed that content was pre-vetted by a regulator before broadcast. Furthermore, a small proportion of participants, and particularly those of a protectionist perspective, thought that content should actually be vetted by a regulator prior to broadcast. Contrastingly, the majority of libertarians contended that pre-vetting of content could be perceived as censorship and represented a potential threat to viewers’ freedoms of choice.

“Everything is reactive isn’t it? It’s after the event be it Ofcom or whatever, once a programme’s gone out and they get some complaints then they react. There actually needs to be a little more like probably in the way in the old days of black and white where the programmes they were censored before they went out...it’s about responsibility but our children certainly need that kind of guidance.” (Male, 55-64, parent, Leeds)

For a high proportion of participants, the lack of understanding of the regulatory landscape was reflected in a lack of understanding of how to complain about content that had caused concern. Younger participants – particularly those under 25 – perceived the complaints process as an onerous one, likely to require the submission of formal communications such as letters or emails. The younger participants favoured faster, more immediate feedback methods such as social media to the perceived slower methods like letter or emails. Indeed, many participants already used social media to discuss content they had or were viewing, and thought that it was a quick way to deliver positive or negative feedback.

Participants under 35 were most likely to have negative perceptions of the people who actually submit complaints to regulators about inappropriate or objectionable content. These younger participants perceived those making complaints as generally being older and perhaps even having ‘too much time on their hands’.

“When you think about Ofcom you think about the type of person that would do that [complain] and you don’t think about our age group. You think about some kind of bored, middle-aged person that is going to take the time and write to Ofcom. But actually there are maybe things we will spot that maybe just kind of go unnoticed. But if you just feel that you could easily tweet Ofcom or just send a quick email and that they were much more contactable that would be good.” (Female, 21-24, non-parent, Edinburgh)

5 Devices: importance and expectations of protections

5.1 Introduction

This section explores the perceived importance of regulation across a range of devices, and draws on self-completion questionnaire data and discussions prior to participants being informed about existing protection and assurance. Again, it should be noted that regulation was not defined to participants at the outset of the sessions, and responses are based on their existing understanding of the term.

5.2 Summary of key findings

- The majority of participants agreed that the often passive nature of broadcast TV viewing and potential exposure of harmful content to vulnerable viewers meant that TV sets should be highly regulated.
- The majority of participants gave slightly lower importance ratings to the regulation of more personal devices like tablets and smartphones, with content viewing requiring a more active choice.
- Participants also considered the regulation of laptops and desktop computers to be less important than TV sets due to a perceived more active choice of viewing.
- The regulation of games consoles was perceived as less important than TV sets, with many participants not recognising that games consoles could enable access to TV-like content via the internet.
- Participants with lower levels of technology engagement were more likely to attribute higher importance to the regulation of devices given their relative lack of technical aptitude and confidence.
- When reflecting on the issue of other people, such as children viewing content unmonitored on private devices or via games consoles away from the main living room, opinions towards the importance of regulation on these ‘personal’ devices increased.

5.3 Importance and expectations of regulation by device

The majority of participants readily associated regulation with sets of rules or guidelines surrounding content, but in-depth understanding was only achieved through the subsequent briefing presentation on current regulation. The vast majority of participants agreed that, on an overall level, the regulation of AV content was important. Indeed, on a 1 to 10 importance scale, where 1 was ‘not important at all’ and 10 was ‘extremely important’, an average importance score of 7.6 was recorded at the outset of the workshops via the use of self-completion questionnaires. The

perceived importance of regulation increased as participants became more informed during the research process, with the highest average scores from older participants (those aged 35+), parents, low technology engagers and, as one would expect, those of protectionist stances.

The diagram below gives an overview of how the importance of regulation varies by the type and nature of device. The diagram plots the devices against the average importance scores from self-completion questionnaires and whether the device is perceived as being private/personal or shared/public.

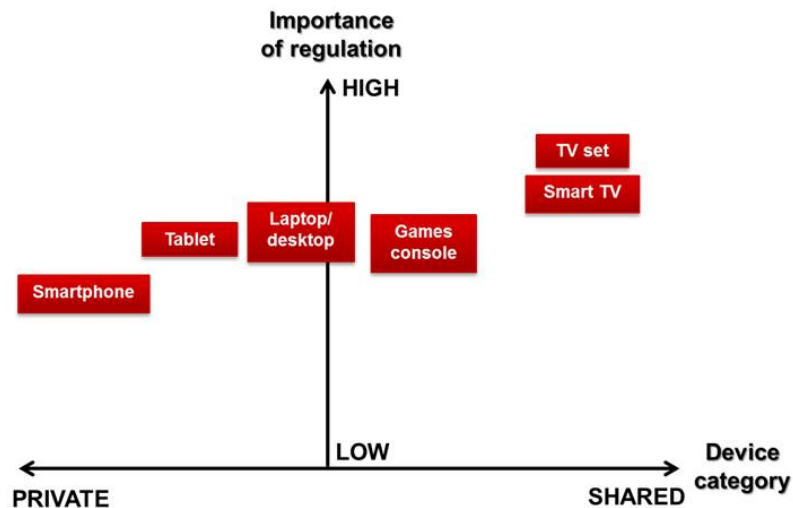


Figure 6: Devices mapped against importance of regulation and device category (private or shared)

TVs/Smart TVs

Drawing again on individual, uninfluenced self-completion responses, participants attributed the highest importance to the regulation of TV sets (an average of 7.9 out of 10) and smart TVs (7.5). Participants deemed TV sets to be public in nature, typically viewed by several family members and thus offered a shared viewing experience. The more passive nature of viewing scheduled content meant that there was a greater risk of children and vulnerable individuals stumbling on potentially inappropriate content. The majority of participants agreed that the often passive nature of TV viewing and the potential exposure to harmful content of vulnerable viewers meant that TV sets and smart TVs should be highly regulated.

It should be noted that when evaluating the importance of regulating smart TVs, the majority of participants focused on smart TVs being used to view broadcast content similar to a regular TV set rather than a device that enables access to content on a number of different platforms including on-demand and over the open internet. Participants' primary consideration of viewing broadcast

content on smart TVs reflected the widespread lack of understanding and appreciation of the connected aspects of smart TVs (as discussed in section 3.2).

Tablets and smartphones

By contrast, the majority of participants gave slightly lower importance ratings to the regulation of more personal devices like tablets (7.0) and, particularly, smartphones (6.61). They deemed viewing on personal devices as requiring a more active choice of the content selected for viewing on the part of the device owner.

It was only through subsequent deliberation that many participants recognised the potential danger of personal devices being used by vulnerable individuals, particularly children using their parents' devices.

Games consoles, PCs and laptops

Similarly, the regulation of games consoles was perceived as relatively less important (6.9) than TV sets with many participants failing to immediately consider their role in delivering AV content. Indeed, the majority of participants, including parents, initially associated games consoles primarily with gaming. The role of consoles in enabling children to watch connected AV content in their rooms only emerged through subsequent deliberation. Participants also assigned lower importance to the regulation of laptop/desktop computers (7.1) than TV sets, with the devices perceived as requiring a more active content choice and the relatively large screens (compared to tablets and smartphones) making direct parental monitoring more feasible.

Lower technology engagers gave higher average importance scores for regulation across all of the devices. The higher importance scores reflected their lower levels of confidence in using devices. Indeed, the majority of low technology engagers, and particularly parents, feared that children were likely to have more advanced knowledge of the devices, thus making usage difficult to monitor and control.

“The difference is now you can’t restrict it for them [children] because they know more about it than what you do.” (Male, 45-54, parent, Belfast)

6 Platforms: importance and expectations of protections

6.1 Introduction

This section moves on from devices and explores the perceived importance of regulation across a range of platforms.⁷ Similar to the previous chapters, it draws on self-completion questionnaire data and discussions prior to participants being informed about existing protection and assurance.

6.2 Summary of key findings

- The majority of participants rated the regulation of broadcast TV as most important in light of the shared nature of viewing, the often passive choice of content, and the potential exposure of more vulnerable individuals to broadcast content.
- The vast majority of participants perceived broadcast TV as being generally safe, with perceptions founded on previous experience and the presence of well-established channel brands.
- For the majority of participants, brand perceptions extended beyond broadcast meaning people expected brands to retain the same quality standards regardless of method of delivery or point of access.
- Most participants wrongly assumed that catch-up was subject to the same regulatory standards as broadcast TV because the content had previously been broadcast. Their expectations for this environment were therefore similar to broadcast TV.
- The more libertarian participants felt that on-demand services should not be as highly regulated as broadcast TV in light of the active choices made by viewers.
- The vast majority of participants (regardless of attitude) said the greatest concern with viewing content sourced from the open internet centred on protecting children and vulnerable individuals from viewing.
- Many participants (both protectionist and libertarians) expressed doubts over the feasibility of offering meaningful protection and assurance online due to the vast volume of AV content and because much of it was derived from sources outside of the UK.

⁷ Definitions of the platforms explored are included in the glossary to this report (page 76).

6.3 Importance of regulation by type of platform



Figure 7: Importance of regulation by platform

Broadcast TV

Participants' importance scores for the regulation of viewing platforms reflected the ratings given for devices. The majority of participants rated the regulation of broadcast TV (7.9) as most important in light of the shared nature of viewing, the often passive choice of content, and the potential exposure of more vulnerable individuals to broadcast content. Parents thought that the regulation of broadcast TV was particularly important as children could be left alone periodically with the TV on, and they expected the medium to meet high standards.

Catch-up, on-demand and 'other internet'

Participants' average importance ratings for catch-up (6.9), on-demand (7.0), and other internet (6.9) were consistently lower than the scores for broadcast TV. The explanations of participants reflected discussion of devices, with catch-up, on-demand and other internet viewing associated with a more active choice of the content consumed.

The importance scores for the regulation of platforms increased during the workshops as participants became more aware of existing regulatory arrangements. In particular, deliberation around the nature of catch-up content resulted in its perceived importance of regulation increasing to a similar level to broadcast TV.

"Because in my mind if it has been produced for broadcast TV then it should be irrelevant whether it is on catch-up or not." (Male, 30-34, parent, London)

In addition, participants assigning higher importance to the regulation of catch-up services thought that the platform gave the chance for retrospective action. For example, if scheduled broadcast content caused widespread offence then the material involved could subsequently be removed from catch-up.

6.4 Protection and assurance expectations by platform

This section examines participants' perceptions of protection across a selection of platforms, namely: broadcast TV, catch-up, on-demand, and other internet.

Broadcast TV

Broadcast TV has a long heritage of safety based on the high standards it must adhere to, and the majority of participants thought that this had been maintained in the increasingly connected environment. Participants recognised that broadcast TV was the most established platform and most familiar and, for many, broadcast TV defines the TV viewing experience. In addition, the vast majority of participants perceived broadcast TV as being generally safe, with perceptions founded on previous experience and the presence of well-established brands. Furthermore, unlike other platforms, the majority of participants were aware that broadcast TV is regulated, and were able to identify Ofcom as the regulator. In terms of specific protections, the watershed was the most readily identifiable and salient broadcast TV protection for the vast majority of participants.

"Again made for television most programmes are going to be fine anyway because they've been through so much self-regulation because everyone making TV programmes in this country knows exactly what they've got to do." (Male, 18-20, non-parent, Edinburgh)

Catch-up

Many older and less technology engaged participants initially used the terms 'catch-up' and 'on-demand' interchangeably when referring to TV-like AV content. However, when familiar brands were mentioned (e.g. catch-up brands like BBC iPlayer, ITV Player, etc., and on-demand services such as Netflix and Amazon Prime Instant Video), the vast majority readily unpicked the difference between services showing previously broadcast content, and those with a wider array of content that may or may not have been shown on TV. In addition, the vast majority of participants wrongly assumed that catch-up was subject to the same regulatory standards as broadcast TV because the content had previously been broadcast.

"I don't understand the distinction why there would be more control over the live TV but yet there wouldn't be when you're watching the same thing on catch-up. Why would there be less?" (Female, 55-64, parent, Leeds)

"It didn't occur to me that your catch-up TV wouldn't have the same regulations as your live [TV]. I never gave it a thought to be honest." (Female, 55-64, parent, Leeds)

With regards to protection, the majority of participants thought that age-confirmation screens on catch-up services were a poor substitute for the broadcast TV watershed and were easily abused. A few participants even suspected that broadcasters were simply 'covering themselves' from liabilities by including age confirmations and, ultimately, catch-up services placed greater responsibility in the hands of parents. Nonetheless, catch-up was viewed as potentially safer than broadcast TV by some participants, as it allowed problematic content to be removed or edited following the original broadcast.

On-demand

As was discussed in the section above, many older and less technology engaged participants initially used the terms catch-up and on-demand interchangeably. However, even when these participants appreciated the differences between catch-up and on-demand, they often had similar expectations in terms of protection and assurance. Moreover, with on-demand services commonly including a range of TV-like content, a large proportion of participants, especially the older and less technology engaged, thought that the same levels of protection as broadcast TV would apply.

The more technology engaged participants were most likely to unpick the differences between live TV and on-demand, particularly in relation to active and passive viewing choices. The more technology engaged appreciated that on-demand was characterised by more active decision-making, with viewers often having to subscribe to a service, pay for the content consumed, and actively select content items from a library of options. The layers of access, such as subscription and payments, were perceived by several participants as a *de facto* means of protection. Conversely, broadcast TV was associated with more passive viewing, with people dipping in and out of a pre-defined broadcast schedule.

The more libertarian participants expressed the view that on-demand services should not be as highly regulated as broadcast TV in light of the active choices made by viewers. For instance, many felt that if you have paid for the content then you are arguably old enough to view it. In addition, a few participants mentioned that on-demand services often have dedicated children's sections, and access can be limited to these based on user logins and PINs.

"And it's an informed choice as well. Looking at the likes of The Sopranos you know there's going to be a lot of effing and blinding and sex and violence and everything else in it. So you know it comes down to a lot of I think...choice." (Male, 45-54, parent, Belfast)

"People pay to use these services right, like Netflix, which means they are paying for that service and everything that it comes with, everything that it entails [so it shouldn't be regulated]." (Female, 21-24, non-parent, Edinburgh)

Other internet

The majority of participants considered AV content sourced from other areas of the internet to be problematic. Concerns were largely centred on children and vulnerable adults being exposed to offensive, inappropriate or potentially harmful material. The internet was also considered to be a regulatory challenge. Protectionist participants associated the internet with lots of red flags, with the free space of the internet perceived as inherently risky in terms of the content included. By contrast, those of libertarian stances prioritised the 'free', unbound nature of other internet content above the potential risks. Regardless of attitude, across the vast majority of participants, the greatest concern with other internet content centred on protecting children and vulnerable individuals from viewing.

Expectations of AV content sourced from the internet also varied in relation to the nature of the content provider. Indeed, participants had far lower expectations of content provided by an individual, compared with content provided by a familiar company or brand.

"Yes, because you've got, say it's YouTube, like I could put something on YouTube right now. Whereas if it's Netflix like you can't put up anything on Netflix so you know there's a barrier." (Male, 16-17, non-parent, Edinburgh)

Moreover, for the majority of participants, brand perceptions would transcend platforms, thus other internet content from a major broadcast brand would retain expectations regarding its quality and suitability.

"Again it goes back to we don't expect to see that on BBC One. We expect to see it on YouTube. Or we're not shocked when we do see it on YouTube." (Female, 45-54, parent, Belfast)

The majority of participants also had higher expectations of larger, well-known non-broadcast brands online. For example, participants expected more protection and assurance from established brands such as Netflix than smaller or less familiar online AV content sources.

"Because Netflix would provide a service for a lot more people than say a random website. So Netflix would have higher standards of regulations." (Male, 25-34, parent, Cardiff)

Overall, the discussion of other internet content (and online content in general) proved to be particularly polarising. The level of online protections drew out those of libertarian and protectionist stances, with libertarians emphasising free and active choice and protectionists concentrating on the dangers.

The vast majority of libertarian participants valued the freedoms associated with the internet. They espoused the democratic nature of the internet and feared the influence of third parties in limiting online choices and freedom of expression. The libertarians were most likely to place responsibility for online AV content consumption with individuals rather than regulatory bodies.

"Internet is your own search. You do your own browsing and you know what you are looking at." (Male, 25-29, parent, London)

Moreover, when considering the example of online viewing by minors, parents were seen to have the ultimate responsibility for supervising and educating children. The majority of libertarians associated online regulation with censorship, and raised concerns over who would make decisions regarding what was suitable to view. Where some vetting of online content was feasible, libertarians contended that the power should remain in the hands of individual consumers through reporting or voting tools where objectionable content was encountered.

By contrast, the protectionist participants focused on the potential dangers of other internet content and actively sought more protection and assurance. In particular, the protectionists identified the need to protect children from viewing inappropriate other internet content and these concerns outweighed considerations of online freedoms. Even when consumption by adults was considered, several protectionists feared that people were becoming desensitised to objectionable content due to the volume available online. For many protectionists, and particularly the older and less technology engaged, access tools alone were not seen to offer adequate protection. Indeed, many were not confident in their technical ability to set controls with children often considered to have

higher aptitude levels. In addition, many protectionists doubted the effectiveness of the current protections offered by other internet content providers. For example, reporting processes on services on Facebook and YouTube were considered to offer limited protection when content could subsequently be reposted.

"It [other internet] should all be regulated, Facebook the whole lot." (Male, 35-44, parent, Belfast)

Nevertheless, many participants, both protectionist and libertarians, expressed doubts over the feasibility of offering meaningful protection and assurance online due to the vast volume of AV content and the international sources.

"I think the problem is that you can do it in the first three things [broadcast TV, catch-up, and on-demand], you just can't do internet. It can't be regulated." (Male, 25-29, parent, London)

6.5 Summary – perceptions of protections by platform

The figure below gives a comparative summary of participants' perceptions of protections for each platform, mapped against the dimension of active versus passive viewing.

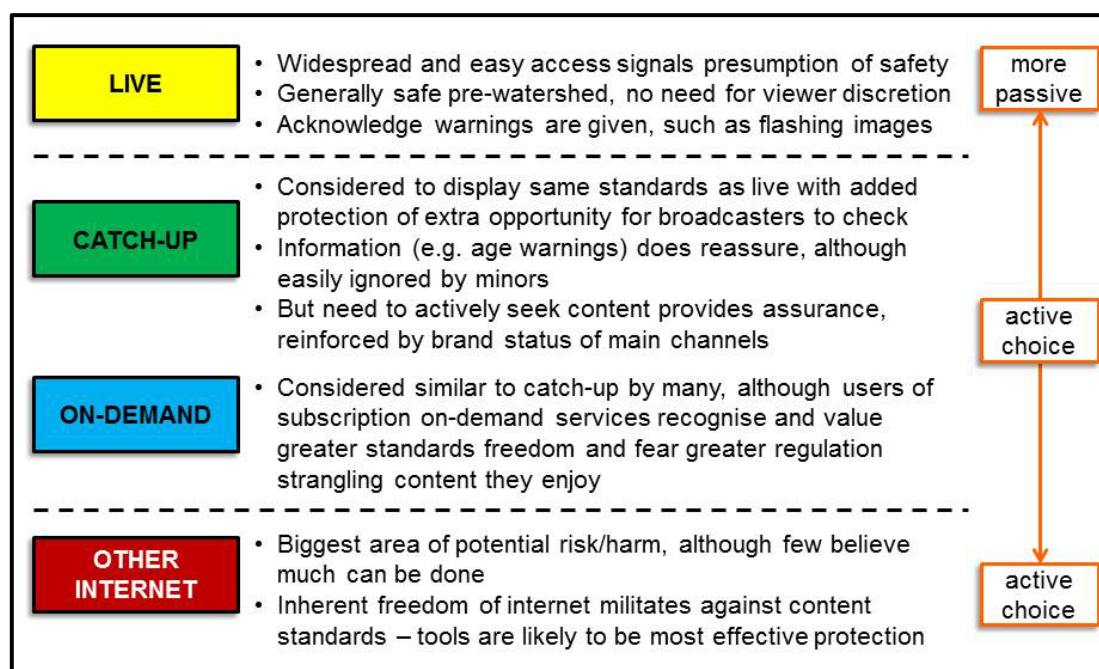


Figure 8: Summary of perceptions of protection by viewing platform

7 Content standards: importance and expectations

7.1 Introduction

This section examines participants' perceived importance of a selection of regulatory areas, and which means of protection (i.e. standards protections, information, or tools) were considered most appropriate for addressing the issues involved. The findings for each regulatory area will be explored in turn, before progressing to discussion of their relative importance to participants. In practice, participants deliberated over a selection of content scenarios that were specifically developed to explore each regulatory area.⁸

7.2 Summary of key findings

- There was universal agreement that protection of minors is the most important area for protection and assurance and it is extremely important to apply protections across all AV platforms (broadcast TV, catch-up, on-demand, and other internet).
- Hatred and accuracy in news were also consistently perceived as extremely important across broadcast TV, catch-up, on-demand, and other internet viewing.
- Offence was the regulatory area that aroused least concern across the vast majority of participants. Most participants understood offence to be largely subjective and typically based on personal rather than shared interpretations of content.
- Participants attributed higher importance to each of the content standards discussed for broadcast TV.
- Protection of minors was the only standards area where participants expected protections from content standards protections, information signposts and tools.
- For the standards areas: hatred, accuracy in news, privacy, fairness and impartiality, participants considered content standards protections as the most appropriate form of protection, with information signposts and tools considered insufficient.
- Participants considered content standards as the most appropriate form of protection for consumer protection (harm), but also recognised a potential role for information signposting.
- For offensive content, the vast majority of participants pointed to the importance of information signposting and highlighted the difficulties in providing protections through standards protections and tools.

⁸ The content standards scenarios are provided in Appendix G.

7.3 Protection and assurance by content standards

The eight regulatory areas considered are listed below, in ascending order of participants' importance ratings for each:

- Protection of minors
- Hatred
- Accuracy in news
- Privacy (protecting individuals)
- Fairness (protecting individuals)
- Consumer protection (harm)
- Impartiality
- Offence

The following sections explore each of the regulatory areas in turn. Definitions of the regulatory areas are provided in each section, along with a summary of the key findings.

7.4 Protection of minors

Definition – Protection of minors

To ensure that children are protected from potentially unsuitable or harmful material that may impact on their physical, mental, or moral development (e.g. offensive language, sexual material, violence, use of drugs and alcohol, dangerous/imitable behaviour; and involvement of children in programmes)

Participants universally agreed that the protection of minors was a priority area for protection and assurance. Indeed, even the most staunchly libertarian participants agreed that where an active, free choice to view was not made by an informed adult, then children must be safeguarded from potentially inappropriate content. In relation to the protection of minors, the majority of participants favoured using all the means of protection at their disposal, including regulation, content information, access tools and, ultimately, legal recourse if required.

The vast majority of participants agreed that broadcast TV should be highly regulated to protect children. They pointed to the often passive nature of broadcast TV viewing and the accessibility of it to children, with responses reflecting earlier discussion around the high importance of broadcast TV regulation. However, given the risks of children accessing content through other platforms,

participants also thought that it was crucial that children were protected when using catch-up, on-demand and, particularly, other internet content.

"[The time of day provocative music videos are shown] should be up to content on the video. I mean if it looks like, if it is really provocative it should be [rated as] eighteen, so it shouldn't be shown until [late in day], maybe an adult kind of music channel that only gets played after midnight or something." (Male, 35-44, parent, Belfast)

"Children are very impressionable. So I think there should be some way of being able to block it [adult content]." (Female, 65+, parent, Leeds)

The majority of participants also identified content information as an important means of protecting children. They saw the provision of information before content as helpful in deciding whether or not it would be suitable for children. In addition, most participants, and particularly the younger and more technology engaged, saw access tools as vital in protecting children when viewing on connected platforms and devices.

"I think if there's children's programmes on it [on-demand services] there should be a barrier." (Male, 16-17, non-parent, Edinburgh)

"Or put your pin in, you know? If the TV was so advanced that something like that [provocative music video] came up and you had to put your pin in." (Male, 35-44, parent, Belfast)

Summary – Protection of minors

- **Protection of minors was the area of greatest concern for participants.**
- **Extremely important across all AV platforms – i.e. broadcast TV, catch-up, on-demand, and other internet.**
- **Participants expected protection using all options available: content standards, information, and tools.**

7.5 Hatred

Definition – Hatred

To protect people from material likely to encourage or incite the commission of crime or lead to disorder

Participants universally considered hatred to be an extremely important regulatory area and, like protection of minors, advocated using the strongest forms of protection available. In particular, most participants favoured using regulation and the UK law to protect people from hatred. Indeed, given the criminal associations with incitement to hatred, information and access tools were not deemed to be sufficient means of protection.

"Well my point that if it [hate speech] becomes an action and something happens at the end of it then obviously there needs to be regulation and then free speech cannot take place in those situation." (Male, 30-34, parent, London),

As with the other regulatory areas, participants considered broadcast TV to be the most important platform in relation to protection from hatred. They pointed to the large audiences for broadcast TV, the often passive nature of viewing, and potential exposure of vulnerable individuals. Nevertheless, with regards to hatred, regulation was also deemed to be important on catch-up, on-demand, and other internet.

"Well, the people in charge of BBC and Yorkshire Television, I don't think they would allow it [hate speech], that kind of thing because they'd have so many complaints your Ofcom would be way off the scale." (Female, 55-64, parent, Leeds)

"Online they have found a place to put that hatred and put that bile because it is not as well regulated." (Male, 30-34, parent, London)

Summary – Hatred

- **Extremely important across all AV platforms, but broadcast TV expected to meet the highest standards.**
- **Expect protections from content standards.**
- **Information and tools considered insufficient.**

7.6 Accuracy in news

Definition – Accuracy in news

To ensure that news, in whatever form, is reported with due accuracy (e.g. no false or misleading information)

The majority of participants believed that accuracy in news was one of the most important of the regulatory areas considered. Across most participants, accuracy in news was an easier concept to grasp than impartiality, and there was widespread acceptance that news coverage should, at the very least, provide accurate information regardless of subsequent interpretation. They thought that accuracy in news was best secured through standards protections, with content information and tools not readily associated with ensuring factual reporting. However, where news coverage had grossly misrepresented individuals, many stated that libel or slander laws would be the most appropriate course of action.

"I expect, as you said like a complete level of accuracy. This is why I don't have as much trust in the news. I do find for example BBC News quite biased. Especially with some of the stories that it's been reported as of recently. For example the Gaza/Israeli conflict. You have to have accuracy in the news." (Female, 25-34, non-parent, London)

"Well I suppose the company could take it [content provider] to court. So it could become legal, couldn't it?" (Female, 35-4, parent, Belfast)

Many participants noted that the coverage of breaking news was an area that presented challenges for accuracy. They considered it important that major news sources verified facts before sharing stories with audiences, or at least pointed out sources of emerging stories that had not yet been verified fully. Whilst accuracy in news was seen to be important across all platforms, broadcast TV was expected to meet the highest standards.

"[Broadcasters] have a duty to be able to give accurate information in the news."
(Female, 16-17, non-parent, Cardiff)

Summary – Accuracy in news

- Extremely important across all AV platforms, but broadcast TV expected to meet the highest standards.
- Expect protections from content standards.
- Information and tools considered insufficient.

7.7 Privacy (protecting individuals)

Definition – Privacy (protecting individuals)

To avoid any unjustifiable breach of privacy in the broadcast of programmes and in the obtaining of material included in programmes (*e.g. filming people in a private place without their consent or other justification*)

The majority of participants deemed privacy to be of very high importance. As with fairness, participants discerned a shift from protecting viewers to protecting subjects, with standards regulation considered the most appropriate safeguard.

The majority of participants agreed that it was crucial to protect privacy through standards across broadcast TV, catch-up and on-demand platforms. They also considered online privacy to be highly important, but thought that it may be more difficult to deliver given the multitude of content sources, and with material often shared by individuals via social media.

"[Privacy should be protected] Otherwise somebody could paint a really terrible picture of you. We need some protection." (Male, 65+, parent, Leeds)

"Yes, privacy should probably be on the internet but because you can go onto You Tube and there will be plenty of videos like that but You Tube won't take it down unless there's been a complaint." (Male, 35-44, parent, Belfast)

Summary – Privacy (protecting individuals)

- Considered very important.
- Broadcast TV, catch-up, and on-demand platforms all considered very important for privacy protections.
- Online AV services also considered to be very important for privacy protections, but recognition that it is difficult to deliver in practice.
- Content standards considered to be the most appropriate form of protection.

7.8 Fairness (protecting individuals)

Definition – Fairness (protecting individuals)

To avoid unjust or unfair treatment of individuals or organisations in programmes (*e.g. editing an interview to give a misleading impression of what was said*)

Many participants likened protecting individuals to the regulatory area of impartiality. They broadly agreed that even in non-news content, it was important to at least offer a right to reply to all those involved. In this respect, it reflects participants' view that fairness was principally focused on protecting the subjects of content, rather than the viewers.

The vast majority of participants identified standards protections as the best means of ensuring fairness. They also recognised a role for UK law in instances where breaches of fairness strayed into the territory of slander or libel. By contrast, participants did not consider fairness as a protection that could be provided through content information or tools to control access.

"They should always get their side. Like even in that 'Cowboy Builders' thing like they phone them several times and if they don't answer them at least they've tried. So they should always like give the opportunity to the other half to see." (Female, 35-44, parent, London)

Participants cited broadcast TV and catch-up as the platforms where fairness should be most tightly regulated. Whilst fairness was still seen as important for on-demand and other internet content, those platforms were again more readily linked to partial material and active viewer choices.

"Yes. It [fairness] does need to be regulated and it needs to be made that, so that is a real, with the newspapers, right, they can print whatever they want on their front and if they are proved to be incorrect they just have to do a little retraction like on page 20 or whatever." (Male, 30-34, parent, London)

Summary – Fairness (protecting individuals)

- **Considered very important.**
- **Broadcast TV, catch-up, and on-demand were the AV platforms of greatest concern for fairness protections.**
- **Content standards considered to be the most appropriate form of protection.**

7.9 Consumer protection (Harm)

Definition – Consumer protection (Harm)

To ensure that consumers are adequately protected from harmful material (*e.g. financial harm or health risks*)

The area of consumer protection drew more varied responses from participants, with expectations differing by platform for some. Indeed, most participants generally had higher expectations for consumer protection on broadcast TV where vulnerable individuals may be viewing. By contrast, whilst still considered important, there was more of an active choice associated with seeking out content and potentially making purchases via connected platforms such as on-demand and other internet.

"I think I mean they have like these adverts for losing weight and oh you know this is the before and after. I don't really know how you can trust a lot of these things. Whichever medium really it's on to be honest. But you would trust more the live TV." (Female, 25-34, non-parent, London)

Many participants initially considered consumer protection to be somewhat unimportant, claiming that they personally would be unlikely to be misled by any content. Nevertheless, when deliberated further more citizen perspectives emerged and they appreciated that where more vulnerable individuals were viewing it was important to ensure that they were protected.

"It's focusing on people that are desperate and they will make mistakes that they wouldn't [normally] make, they wouldn't be making a rational decision." (Male, 55-64, parent, Leeds)

The majority of participants identified content standards as the most appropriate means of protecting viewers from harm. They considered broadcast TV as the priority for content standards given the often passive nature of viewing and the potential exposure of vulnerable individuals to harmful content. Many participants also recognised a role for content information with consumer warnings provided before content was shown or within EPG information screens. In addition, they agreed that there should be a role for UK law in cases where consumers were being deliberately misled by content.

Summary – Consumer protection (Harm)

- Varied responses with expectations differing by platform.
- Most participants had higher expectations for broadcast TV where vulnerable individuals may be viewing.
- Lower expectations of protections for on-demand and other internet platforms, which were associated with a more active choice to seek out content and purchase products.
- Content standards viewed as the most appropriate form of protection, and also a role for content information signposting to flag potentially harmful content.

7.10 Impartiality

Definition – Impartiality

To ensure that news, in whatever form, is presented without bias, and that other programmes treat matters of political or industrial controversy and public policy with due impartiality (*e.g. unbalanced coverage of an election or a strike*)

Participants, overall, considered impartiality important, yet it failed to resonate with them as much as most of the other regulatory areas discussed. The majority of participants agreed that, in general, both sides of a story should be presented where possible, with the exception of potentially extreme views that could cause offence or, of most concern, incite hatred or violence. The more technology engaged were most likely to note that, with a multitude of sources available, people can proactively search for different viewpoints rather than relying on single sources to provide balance as a rule.

Across the majority of participants, there was an expectation that broadcast TV and catch-up content would adhere to high standards of impartiality. By contrast, on-demand and other internet sources were more readily associated with offering partial viewpoints that people could actively seek out – often to reflect or challenge their personal viewpoints. In this respect, they likened other internet sources to newspapers, which delivered – an often valued – editorial viewpoint on issues. A minority of participants raised doubts over the impartiality of broadcast TV coverage believing that brands such as Sky, and even public service broadcasters like the BBC, have recognisable positions.

“So someone like BBC, ITV, whatever you know, the big players...I believe that they should give everyone a say.” (Male, 30-34, parent, London)

"I think it's just the same like if it was a brand. Like BBC or something they should do [be impartial] but if it's on YouTube and it's just like your personal opinion then you should be able to say what you think." (Female, 16-17, non-parent, Edinburgh)

For the majority of participants, content standards were identified as the most suitable form of protecting audiences. They considered standards protections as most appropriate for broadcast TV and catch-up services, with lower expectations of the impartiality of on-demand and other internet platforms. Content information and tools were not seen as relevant means of ensuring that impartial content was provided. Indeed, participants expected broadcast TV and catch-up services to be impartial, and warnings of potentially partial content were not perceived as an appropriate protection. Similarly, participants' high expectations of impartial broadcast TV and catch-up content meant that setting controls on access failed to deliver sufficient protection.

Summary – Impartiality

- **Consistently rated of lower importance compared to the other standards areas discussed.**
- **Majority of participants expect broadcast TV and catch-up content to adhere to high standards of impartiality.**
- **Low expectations of impartiality for on-demand and other internet with participants actually expecting partial content on these platforms.**
- **Content standards considered to be the most appropriate form of protection.**

7.11 Offence

Definition – Offence

To ensure that members of the public are adequately protected from the inclusion of offensive material (*e.g. sex, violence, offensive language, discriminatory treatment/language, violence, dangerous behaviour, and suicide*)⁹

Offence was the regulatory area that aroused least concern across the vast majority of participants. Most participants understood offence to be largely subjective and typically based on personal rather than shared interpretations of content. Moreover, as shown in the discussion around existing content concerns, the majority of participants reported rarely taking offence at AV content and –

⁹ Note: The scenario discussed by participants centred on the use of an offensive slang term by a contestant in a competition. The scenario did not overtly extend to a situation where the use of the slang term could be more readily associated with hatred than offence.

when they did – they would usually stop watching rather than making a complaint or pursuing other action. Younger participants were the least likely group to take offence and, therefore, attributed least importance to the regulatory area.

"What's offensive to one is not offensive to another." (Female, 45-54, parent, Belfast)

"You can't control what people are going to be offended by at the end of the day."
(Male, 25-34, non-parent, London)

"Well you self-regulate, you don't watch that channel." (Male, 55-64, non-parent, Leeds)

Participants highlighted an exception where offence could present more of an issue if the material was at the expense of a specific minority group (e.g. content offensive to ethnic minority groups, those with disabilities/impairments, etc.). However, most participants agreed that whilst material could be deemed to offend some groups or individuals, it would only present a major issue if the content strayed into more criminal activity (e.g. inciting violence, actively promoting discrimination, etc.).

"You should have some kind of responsibility there not to send anything out that's massively derogatory or nasty to a particular group of society." (Female, 25-34, non-parent, London)

In addition, for several participants, the level of offence taken often depended on the context and type of content. For example, a documentary could expose offensive attitudes whilst not actively promoting such views, or risqué comedy could include extreme statements in a comedic context whilst not necessarily defending or espousing the views.

In relation to types of protection, the majority of participants thought that regulation might not be feasible given the subjective nature of offence. Similarly, they felt it would be difficult to set access controls to block offensive content as what is considered offensive varies widely between different people. By contrast, many participants recognised that information could be of use to warn of content that some viewers may find offensive. The vast majority of participants agreed that legal routes should only be pursued when offence progresses to active incitement to hatred or other criminal acts.

Broadcast TV was seen by participants as the area where most protection from offensive content should be applied. By contrast, offence was viewed as slightly less important on connected platforms and devices where a more active choice to view was made.

Summary – Offence

- **Consistently rated of lower importance compared to other standards areas discussed.**
- **Platform of most concern was broadcast TV; protection from offence seen as less important on connected platforms that were associated with active choice.**
- **The vast majority of participants agreed that the subjective nature of offence meant that it was difficult to offer protection through standards regulation and tools. However, many recognised that signposting via content information could provide a useful protection mechanism.**

7.12 Overall summary and relative importance

- Firstly, the participants rated all of the regulatory areas to be highly important, with average scores of above 3 out of 4 for each. Reflecting the absolute importance of each regulatory area when deliberated in the groups, the top three most important were protection of minors, hatred, and accuracy in news. These three regulatory areas were also consistently perceived as most important across broadcast TV, catch-up, on-demand, and other internet viewing.
- In general, participants attributed higher importance to each of the regulatory areas for broadcast TV. The high importance scores reflect the overarching view for a majority of participants that the regulation of broadcast TV is a priority – given the often passive nature of viewing, the extensive reach of broadcast TV, and the potential exposure of vulnerable individuals.
- Impartiality and offence were consistently rated lowest by participants, although they still received average scores of over 3 out of 4. The relatively low ratings reflect participants' deliberations surrounding the subjective nature of offence, and expectations of impartiality that vary by platform. Indeed, impartiality ranks 8th in average importance ratings for on-demand and other internet, switching places with offence.

The table below presents the standards areas in rank order of importance, and collates the summaries of audience expectations for each area.

Table 3: Summary – Content standards importance ranking and audience expectations

| Rank | Standard | Audience expectation |
|------|----------------------------------|--|
| 1 | Protection of minors | <ul style="list-style-type: none"> Protection of minors was the area of greatest concern for participants. Extremely important across all AV platforms – i.e. broadcast TV, catch-up, on-demand, and other internet. Participants expected protection using all options available: content standards, information, and tools. |
| 2 | Hatred | <ul style="list-style-type: none"> Extremely important across all AV platforms, but broadcast TV expected to meet the highest standards. Expect protections from content standards, with information and tools insufficient. |
| 3 | Accuracy in news | <ul style="list-style-type: none"> Extremely important across all AV platforms, but broadcast TV expected to meet the highest standards. Expect protections from content standards, with information and tools insufficient. |
| 4 | Privacy (protecting individuals) | <ul style="list-style-type: none"> Considered very important. Broadcast TV, catch-up, and on-demand platforms all considered very important for privacy protections. Online AV services also considered to be very important for privacy protections, but recognition that it is difficult to deliver in practice. Content standards considered to be the most appropriate form of protection. |
| 5 | Fairness | <ul style="list-style-type: none"> Considered very important. Broadcast TV, catch-up, and on-demand were the AV platforms of greatest concern for fairness protections. Content standards considered to be the most appropriate form of protection. |
| 6 | Consumer protection (Harm) | <ul style="list-style-type: none"> Varied responses with expectations differing by platform. Most participants had higher expectations for broadcast TV where vulnerable individuals may be viewing. Lower expectations of protections for on-demand and other internet platforms, which were associated with a more active choice to seek out content and purchase products. Content standards viewed as the most appropriate form of protection, with a role for content information in signposting potentially harmful content. |
| 7 | Impartiality | <ul style="list-style-type: none"> Consistently rated of lower importance. Majority of participants expect broadcast TV and catch-up content to adhere to high standards of impartiality. Low expectations of impartiality for on-demand and other internet with participants actually expecting partial content on these platforms. Content standards considered to be the most appropriate form of protection. |
| 8 | Offence | <ul style="list-style-type: none"> Consistently rated of lower importance. Platform of most concern was broadcast TV; protection from offence seen as less important on connected platforms that were associated with active choice. The vast majority of participants agreed that the subjective nature of offence meant that it was difficult to offer protection through standards regulation and tools. However, many recognised that signposting via content information could provide a useful protection mechanism. |

8 Content information signposting

8.1 Introduction

This section examines participants' awareness and attitudes towards content information, including importance of the various information types. The research explored opinions on information signposts such as warnings about content, age ratings, classifications, and parental guidance – full details below.

8.2 Summary of key findings

- Participants' awareness was highest for the types of information familiar with more 'traditional' media, such as TV and films.
- Awareness of information types was highest amongst younger participants (those under 35) and high technology engagers.
- The vast majority of participants attributed very high importance to information as a protection mechanism.
- Across all the participant sub groups, content information was recognised as important in guiding viewing decisions particularly where more vulnerable individuals may be watching.
- The majority of participants said that content information did not offer sufficient protection when used in isolation.
- The majority consider content information as very important for catch-up and on-demand services that do not adhere to a watershed.

8.3 Awareness and importance of content information

Awareness of content information

The self-completion questionnaires gauged participants' awareness of a range of content information types at the beginning of the workshops. Awareness of the types of information from a prompted list was generally high, with each of the average scores above 75%.

As summarised in the diagram below, the content information types can be split between those achieving *very high* levels of awareness (90%+) and those with *high* awareness levels (c. 75-90%).

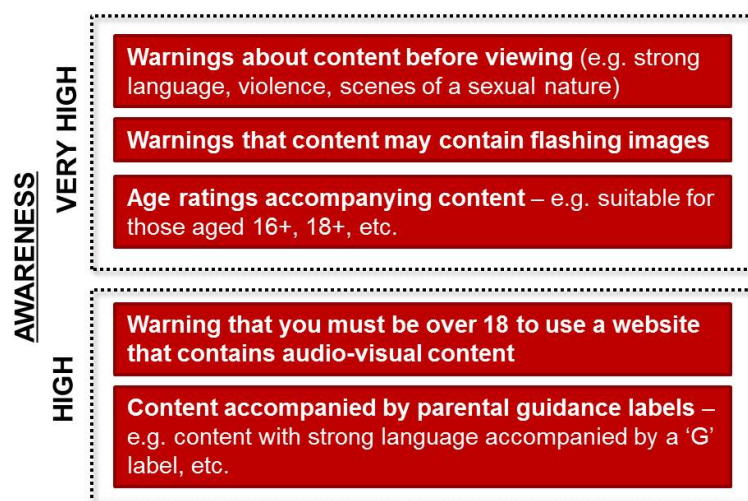


Figure 9: Awareness of types of content information

Participants' awareness was highest for the types of information familiar with the more 'traditional' media, such as TV and films. For example, participants' awareness scores were in excess of 90% for 'warnings about content before viewing', 'warnings that content may contain flashing images', and 'age ratings accompanying content'.

Participants' awareness was slightly lower for information types more readily associated with catch-up, on-demand, and other online platforms. There were very similar awareness scores for 'warning that you must be over 18 to use a website' (82%) and 'content accompanied by parental labels' (80%). Awareness of information types was highest amongst younger participants (those under 35) and high technology engagers. The higher awareness amongst these participants reflects the greater familiarity of younger and higher technology participants with catch-up, on-demand, and other internet platforms.

Importance of content information

The vast majority of participants attributed very high importance to each of the information types.

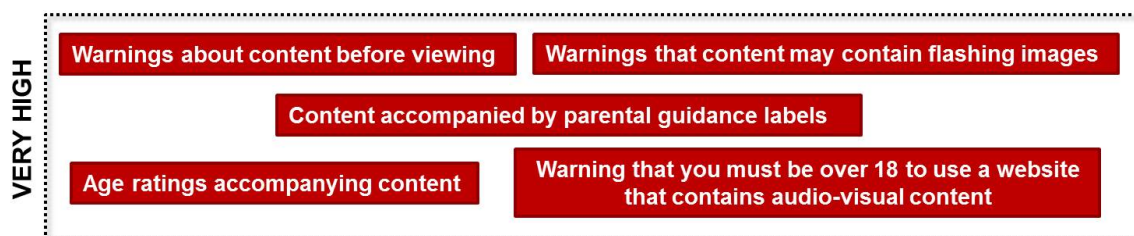


Figure 10: Importance of types of content information

Participants considered 'warnings about content before viewing' and 'warnings that content may contain flashing images' as the most important, with both information types having average

importance ratings of 8.8 out of 10. However, each of the content information types were perceived to be of very high importance, with all of them having averages scores of 8 or above.

Content information was considered most important by older participants (those aged 35+), parents and low technology engagers. Across all the participant sub groups, content information was recognised as important in guiding viewing decisions particularly where more vulnerable individuals may be watching. In addition, libertarian participants assigned high importance to content information, recognising that it allowed the freedom to make informed choices rather than restricting content choices.

8.4 Informed responses to protection and assurance with content information

This section investigates participants' attitudes towards content information and reflects informed discussion following the briefing on current protection and assurance.

Reflecting the self-completion responses, the vast majority of participants considered content information to be an important guide to viewing decisions. The majority of participants appreciated that information, provided by broadcasters and content providers, made it easier to make decisions about what they watched or what their families watched.

"Well with children the information can determine as a parent whether it's suitable I think for the child to watch." (Male, 45-54, parent, Belfast)

"I don't think I have watched a TV programme and not like read what it is about first. Obviously like if it says, like full of murders and stuff like that, I am not going to watch it with my cousin, with my little cousin." (Male, 16-17, non-parent, Cardiff)

Libertarian participants felt that content information was valuable in making informed, free viewing choices. Several advocates of content information pointed out that it avoided the pitfalls of technical literacy associated with access tools, and excessive restriction associated with standards protections. In addition, types of content information such as flashing image warnings were considered essential given the potential impact on those with relevant health conditions.

"But they do put up saying that there's content in this, flash photography, extreme images and so forth. So really you should know what you're getting yourself into." (Male, 25-34, non-parent, London)

Nevertheless, the majority of participants agreed that content information did not offer sufficient protection when used in isolation. Several participants mentioned that content information could be missed if given once before a programme, or if it required viewers to access information features on electronic programme guides, etc.

"I think if you just think about mothers with kids who are at home and something like that [graphic material on a news bulletin]. If they had to be out of the room for a second and the news has to be on to miss that warning at like one in the afternoon. Say it happened but don't show it till the watershed. You can see it on the internet, you can see it on the other platforms that we talked about, but TV is something that is on in the household." (Male, 21-24, non-parent, Edinburgh)

The majority of participants were generally aware that content information warnings were provided on broadcast TV, but there was less understanding around where and when the warnings were given. Several participants thought that consistent warnings before programmes and, where relevant, following advertising breaks, would ensure that all viewers received the information. In addition, there was agreement amongst participants that content information was very important for catch-up and on-demand services that did not adhere to a watershed.

Some parents, and especially older participants, suggested that all broadcast programmes and other AV content items should be accompanied by age ratings, in a similar way to the familiar BBFC (British Board of Film Classification) ratings for movies, to help guide children's viewing. Moreover, a small number of parents would like an indication of the maturity required to watch content rather than a numerical age rating alone. For example, descriptions of content could be given to inform decisions, such as 'frequent bad language' or 'frequent nudity or scenes of sexual nature', etc.

"Something that you tape it [TV] on, ITV +1 or ITV +2 whatever it is. So you need to put a warning on that as well saying warning you know may contain strong language and images of a sexual nature you know." (Female, 55-64, parent, Leeds)

Participants flagged other shortcomings of content information, such as children – particularly teenagers – not taking heed of warnings. For example, many doubted that teenagers would stop viewing if an age rating or content warning appeared before content on a catch-up or on-demand service. In addition, a few participants noted that content information must be continuously updated to reflect contemporary shifts in attitudes towards content standards.

"I know what my little brothers are like and they're quite headstrong. If they want to watch it...they'll watch it." (Female, 25-34, non-parent, London)

"I think the whole rating system is absolutely ridiculous. Like you say again society is changing rapidly all the time and someone who's 15 is not going to be offended by an 18 year old movie. And the more you put these barriers in front of them they more they're going to want to watch it. That's just the reality." (Male, 25-34, non-parent, London)

9 Access control tools

9.1 Introduction

This section examines participants' awareness and attitudes towards access control tools, including importance of the various tools under discussion. The research explored opinions on access tools such as PIN protections, programme scheduling, technical controls and availability of channels on the electronic programme guide (EPG) – full details below.

9.2 Summary of key findings

- Awareness was highest for 'PIN protection for programmes or whole channels' and 'programme scheduling (e.g. the watershed)'
- Overall, the awareness of tools was lowest amongst over 35s, parents and low technology engagers.
- The vast majority of participants gave high importance ratings to the tools discussed, although the scores were marginally lower than those for the content information types evaluated.
- The majority of participants recognised the potential use of tools in restricting children's and other vulnerable individuals' access to potentially inappropriate content.
- Younger and more technology engaged participants were most likely to strongly advocate tools, as a result of their high levels of technology aptitude and confidence.
- Older participants tended to have less confidence in using tools, and feared that children with higher levels of technology aptitude could easily circumvent them.
- The vast majority of participants noted that tools were not enough in isolation, and information was required to guide which content items were controlled with tools.
- Tools were viewed by parents as especially important for connected services and other internet content due to lack of existing regulation and the challenges of monitoring children's viewing on such platforms.

9.3 Awareness and importance of tools

Awareness of tools

Participants had considerably more varied awareness of the access tools tested than the types of content information. The diagram below gives an overview of participants' awareness levels from a prompted list, with the majority of tools achieving high awareness levels (50% +).

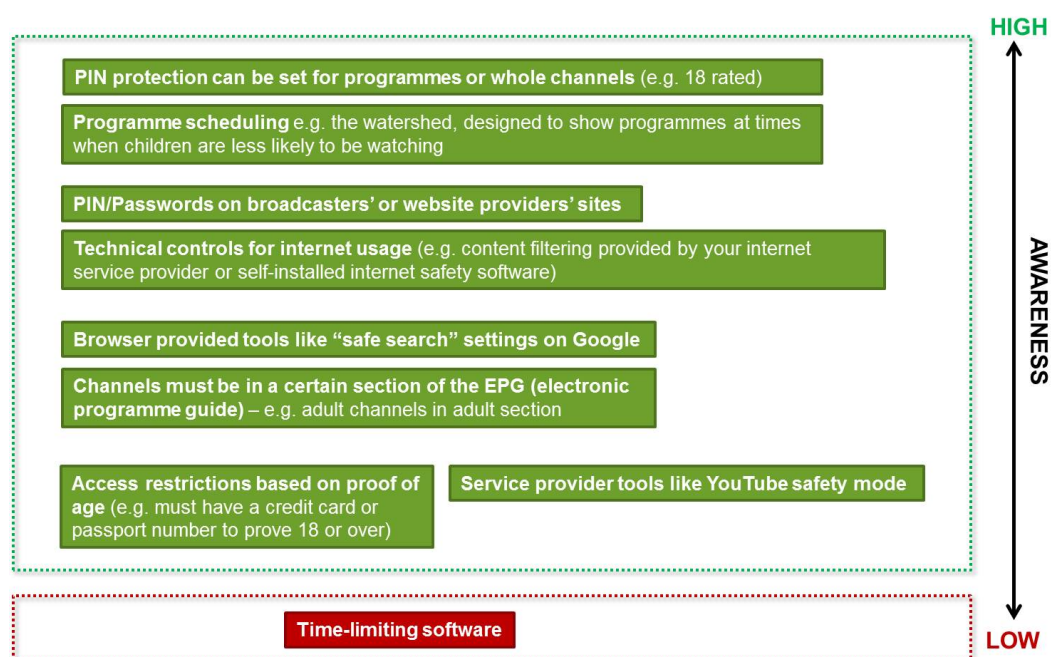


Figure 11: Awareness of types of tools

In descending order as presented on the diagram, participants' awareness was highest for 'PIN protection for programmes or whole channels' and 'programme scheduling (e.g. the watershed)'; both of which relate to traditional broadcast protections. The high awareness scores were driven by participants' familiarity with the watershed (which was also recognised by the vast majority of participants in the workshop quiz)¹⁰, and familiarity with PIN protections from those subscribing to or having previously used paid-for TV packages.

Around three quarters of participants were aware of 'PIN/passwords on broadcasters' or website providers' sites' and 'technical controls for internet usage'. The slightly lower levels of awareness for these tools were fuelled by lower awareness from the older and lower technology engaged participants.

Just over two thirds of participants claimed awareness of 'browser provided tools' and 'channels in certain sections of the EPG (electronic programme guide)'. Again, participants unaware of these tools were more likely to be older and less engaged with AV technology.

Looking further down the awareness scale, around 6 in 10 were aware of 'access restrictions based on proof of age' and 'service provider tools like YouTube safety mode'. Following the awareness trends of the other tools, participants who were older and less technologically engaged were less familiar with these typically web-based access controls.

¹⁰ See Appendix F for a copy of the workshop quiz

Only a third of participants claimed awareness of ‘time-limiting software’. The lower awareness may be attributed to time-limiting software often being a feature of more advanced devices. In addition, ‘time-limiting software’ is somewhat different from several of the other tools tested, as it relates to user behaviour by restricting the duration of usage rather than forestalling use at the point of attempting to access content.

Overall, the awareness of tools was lowest amongst over 35s, parents and low technology engagers. The lower awareness amongst these groups was attributed to the more technologically advanced services, devices and platforms that several of the tools may be associated with.

Importance of tools

The vast majority of participants gave high importance ratings to the tools tested, although the scores were marginally lower than those for the content information types evaluated.

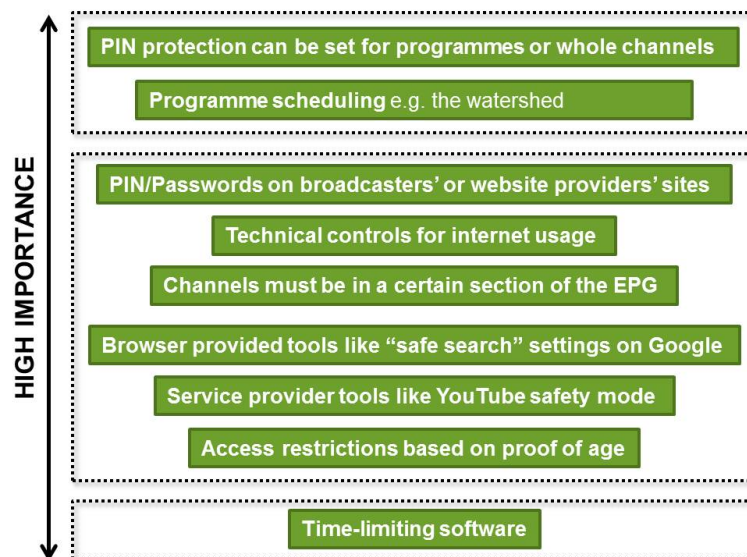


Figure 12: Importance of types of tools

Participants’ highest importance ratings (averaging just over 8 out of 10) were for ‘PIN protection for programmes or channels’ and ‘programme scheduling’, thus correlating with the leading awareness scores for those tools.

The majority of participants also gave high importance ratings to the next selection of tools (those in the middle box on the diagram above), with average scores between 7 and 7.9 out of 10. Again, the rank order of importance broadly reflects participants’ awareness of the access tools. Participants rated ‘time-limiting software’ as least important, although the average rating was fairly high at 6.5 out of 10 on the importance scale.

It should be noted that the average importance scores were highest for those with lowest awareness of the tools – that is, older participants (over 35s), parents, and low technology engagers. The high importance reflects the importance of tools to participants with young children, and the issues surrounding their aptitude and confidence using tools versus the perceived high levels of knowledge amongst children. Participants' concerns regarding their ability to use access tools effectively will be explored in greater detail in the following chapter.

9.4 Informed responses to protection and assurance with tools

This section investigates participants' attitudes towards access control tools and reflects informed discussion following the briefing on current protection and assurance.

The majority of participants considered access control tools to be very important, and recognised their potential use in restricting children's and other vulnerable individuals' access to potentially inappropriate content. Younger and more technology engaged participants were most likely to strongly advocate tools, as a result of their high levels of technology aptitude and confidence. By contrast, older participants tended to have less confidence in using tools, and feared that children with higher levels of technology aptitude could easily circumvent them.

"I know my son-in-law has a Smart Television and his seven and six year old is far more literate than I am. They know more about it than I will ever know." (Female, 65+, grandparent, Leeds)

"My nan despairs because they've got like a full set up in the house and she knows that they can still get on it because they can go through different things and bypass it. So I think that's almost impossible to regulate if the internet providers themselves won't regulate it." (Male, 21-24, non-parent, Edinburgh)

"It's easy to get around though. I remember I knew the PIN on my Sky box when I was like 12. I just used to watch my dad put it in. It's not hard to get round". (Male, 18-24, non-parent, Cardiff)

Libertarian participants saw access tools as a means of placing power in the hands of individuals rather than third-party regulators. For libertarians, tools could be used to control access to content that they personally deemed unsuitable, rather than relying on decisions made by regulators that may restrict their viewing choices.

However, the vast majority of participants noted that tools were not enough in isolation, and information was required to guide which content items were controlled with tools (e.g. age rated content, content dealing with specific adult themes, etc.). When discussing tools, many participants cited the TV watershed as a way of delivering clear guidance to audiences on whether programmes broadcast before or after the threshold were suitable for children and vulnerable individuals.

Parents, and especially younger parents, were most likely to advocate tools and their role in restricting children's viewing of adult content. Many of the parents were familiar with access tools, through use of subscription TV services such as Sky, Virgin Media, BT TV, and TalkTalk. Tools were viewed by parents as especially important for connected services and other internet content due to a relative lack of existing regulation and the challenges of directly monitoring children's viewing on such platforms.

The majority of participants agreed that tools were most suitable for controlling the viewing of younger children. Younger children were considered to be generally more compliant with parents' wishes, and less likely to identify workarounds or access content elsewhere (e.g. on friends' devices). By contrast, older children and teenagers were thought to be more likely to find ways of getting around access restrictions owing to superior levels of technology knowledge than many parents.

"You've got all the tools in the house and whatever and they are not going to go to some Wi-Fi spot at the age of five or six to go find something are they?" (Male, 25-34, parent, Cardiff)

"Well I've seen things like...put in your date of birth. Like a 15 year old can't just...three years back and then see whatever the hell he wants. He's not going to go 1999, no...I can't watch this. It's not going to happen." (Male, 35-50, non-parent, Belfast)

"And children have all these devices. They have all these multi-media devices so therefore how on earth do you start putting a PIN on certain things?" (Female, 55-64, non-parent, Leeds)

Several parents also discussed the limitations of access tools, such as the failure of some to restrict inappropriate content broadcast pre watershed. For example, many parents felt that soap operas such as *Hollyoaks* dealt with adult themes, yet were not covered by PIN protections as they were broadcast pre watershed. Conversely, there were frustrations from some parents over PIN

protections being placed on post-watershed items that were actually deemed to be suitable for children, such as *Match of the Day*.

"It was about half past six and some guy was thrown under a train. I remember just thinking it wouldn't have happened before [on Hollyoaks]... that kind of thing has changed because there was massive thing about the nine o'clock watershed years ago."
(Male, 25-34, parent, Cardiff)

10 Protection and assurance in the future

10.1 Introduction

Finally, this chapter examines participants' considered responses to the future of protection and assurance. Participants discussed a selection of future scenarios, which introduced varying levels of protection across broadcast TV, catch-up, on-demand, and other internet. This chapter summarises the responses stimulated by the scenarios presented at a platform level.

This chapter will, firstly, introduce the future scenarios that were evaluated. Secondly, participants' future preferences will be explored for each of the viewing platforms considered – broadcast TV, catch-up, on-demand, and other internet. For each platform, comparisons will be made between the views of the libertarian and protectionist participants. Indeed, consideration of future protection and assurance further distinguished the standpoints of those favouring regulation of other internet content (protectionists) and those favouring no regulation of other internet (libertarians).

As was discussed at the outset of this report (subsection 2.4) the libertarian and protectionist participants were qualitatively derived from attitudinal differences rather than being primarily segmented on demographics. However, within the research sample, the proportions of libertarians and protectionists and their demographic characteristics were broadly as follows:

- Around two thirds of participants were protectionists, and were more likely to be female, aged 35 and over, parents, and low technology engagers.
- Around a third of participants were libertarians and were more likely to be male, aged under 35, non-parents, and high technology engagers.

10.2 Summary of key findings

- The vast majority of all participants favoured high regulatory standards on broadcast TV, similar to the status quo.
- The majority of participants believed that the level of catch-up regulation should be the same as broadcast TV.
- Across all participants, there were doubts over the practical feasibility of effectively regulating other internet AV content.
- The over-whelming majority universally rejected an entirely unregulated environment across all the platforms.

Protectionists' views

- Concerns of protectionists centred on on-demand and other internet content, and were fuelled by lower levels of technical aptitude and lower confidence in using access tools as an alternative to regulation.
- They generally favoured increased regulation of the internet with parents in particular being the most likely to consider other internet a priority area for increased regulation.
- Older participants and the less technology engaged were most likely to favour consistent regulation across platforms, given their lack of confidence and aptitude with regards to internet-delivered content.

Libertarians' views

- The vast majority of libertarians opposed increased regulation of on-demand as they associated it with an active choice of content.
- The libertarian participants viewed the consumption of other internet content as a matter of free, active choice and also expressed concerns over any third-party regulation of the internet.

10.3 Future scenarios

Participants evaluated the future scenarios in the latter stages of the workshops when they had been informed about the current regulatory landscape, and had deliberated over the types of protection available (standards, information and tools). The figure below summarises each of the six scenarios that were evaluated by participants. The scenarios range from the status quo to a completely unregulated environment, and cover a range of levels of regulation for broadcast TV, catch-up, on-demand, and other internet platforms.

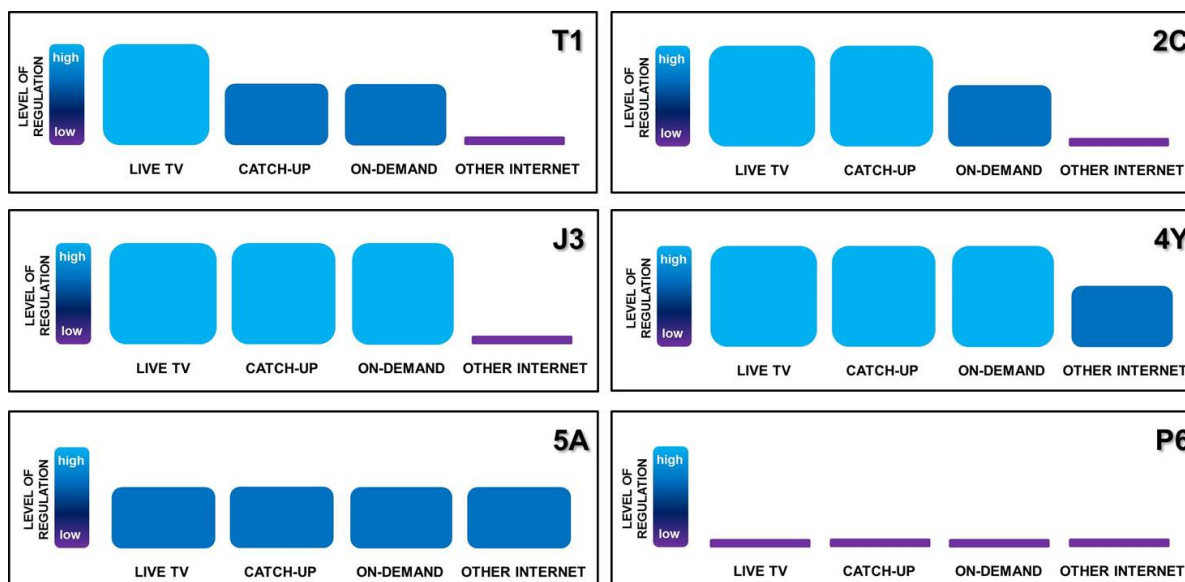


Figure 13: The six future scenarios evaluated¹¹

- Scenario T1: outlined the existing regulatory arrangements, with broadcast TV regulated to high standards, fewer standards for catch-up and on-demand, and no regulation for other internet content.
- Scenario 2C: increased the level of catch-up regulation to match broadcast TV, with fewer standards for on-demand, and no regulation of other internet content.
- Scenario J3: introduced consistent high standards across broadcast TV, catch-up and on-demand, with other internet content continuing to be unregulated.
- Scenario 4Y: featured high regulatory standards across broadcast TV, catch-up and on-demand, with other internet content regulated as far as possible.
- Scenario 5A: introduced a consistent minimum standard across the four types of viewing.
- Scenario P6: presented an environment where there would be no regulation of broadcast TV, catch-up, on-demand, or other internet content.

Across each of the scenarios tested, common law, providers' own rules, and content information and access tools continued to be available.

The following sections explore participants' future protection and assurance preferences across the key viewing platforms summarised from the discussions stimulated by the scenarios. For each platform, comparisons are made between the two identified attitudinal preferences of libertarian and protectionist participants.

¹¹ The full-size versions of the scenarios discussed by participants are provided in Appendix H

10.4 Broadcast TV

Reflecting earlier discussion, the vast majority of participants – protectionists and libertarians alike – thought that the regulation of broadcast TV was highly important and they wanted this to continue in future. Participants cited the often passive nature of broadcast TV viewing and the exposure of children and other vulnerable individuals to content as making high regulatory standards essential.

Protectionists' views

As a result, protectionists universally responded negatively to future scenarios that lowered broadcast TV standards. They adopted an 'if it isn't broke don't fix it' attitude towards any changes to broadcast TV regulation, with many stating that broadcast TV, catch-up, and on-demand should all be highly regulated.

Libertarians' views

A majority of the more moderate libertarians also rejected any decrease in the standards of broadcast TV regulation.

"I don't like removing the regulation from [broadcast] TV. I think the way it is now is fine. I'm not really sure about putting a higher censorship on the internet." (Male, 18-20, non-parent, Edinburgh)

10.5 Catch-up

Protectionists' views

The vast majority of protectionist participants thought that catch-up content should be regulated to the same high standards as broadcast TV. As a result, protectionists favoured scenarios that increased the level of catch-up regulation to match broadcast TV, and rejected future options that entailed having lower regulation of catch-up content. Many protectionists perceived catch-up as already being regulated to the same standards as broadcast TV as the content had already been broadcast. Moreover, given that catch-up content had typically been broadcast previously, higher standards of regulation than broadcast TV could actually be achieved by removing content deemed to have been inappropriate or objectionable when broadcast.

"That makes no difference because everything on catch-up has been already shown on TV, which has already been regulated." (Female, 65+, parent, Leeds)

Libertarians' views

The majority of libertarian participants also favoured increasing the level of catch-up regulation to match the high standards of broadcast TV. As with protectionists, the majority of libertarians perceived catch-up as already meeting the same standards as broadcast TV as the content had previously been broadcast. Therefore, for libertarians, an increase in catch-up regulation was seen as providing a true reflection of the current level of regulation (rather than an increase) and – crucially for them – did not involve in practice more regulation of on-demand or other internet AV content.

"This [Scenario 2C] would be, for me personally, the ideal one because then catch-up would adhere to the same high standards as live TV which is what I thought it adhered to anyway. On Demand...TV archives, films and videos you've searched for them yourself and then internet I don't feel that you could realistically govern that without sort of blocking everything." (Female, 25-34, parent, Cardiff)

10.6 On-demand

Protectionists' views

The future of protection and assurance for on-demand content (beyond catch-up services) proved more divisive and drew out the differing views of protectionist and libertarian participants. The vast majority of protectionist participants had recognised the increased level of catch-up regulation as a small step forward, and they thought that on-demand content should also be regulated to the same standards. Many of the protectionists who advocated increased on-demand regulation likened the content available to that provided on catch-up services.

"On-demand and catch-up and live TV should be the same because they're all being shown at, like especially with catch up, they've all been shown on TV at some point. So that should automatically make it be the same. And on-demand it's most likely have been on TV at some point as well. Or in the cinema or somewhere else. So this should all get the same standard." (Male, 18-24, non-parent, Cardiff)

The majority of the protectionists felt that while adults should have some freedom to actively choose what they watch, children and vulnerable individuals needed to be protected from potentially inappropriate content. The concerns of protectionists were fuelled to an extent by lower

levels of technical aptitude and lower confidence in using access tools as an alternative to regulation.

Libertarians' views

By contrast, the majority of libertarian participants had concerns over the increased regulation of on-demand services, which was seen as an unwelcome departure from the status quo. These predominantly young (under 35), male and highly technology engaged participants associated on-demand services with an active, informed choice to view. Moreover, many libertarian participants who actually used subscription on-demand services felt that paid-for services should offer access to a broader range of content, with vulnerable individuals' viewing restricted through tools such as PINs.

"Because people pay to use these services right, like Netflix, which means they are paying for that service and everything that it comes with, everything that it entails."

(Female, 16-17, non-parent, Cardiff)

"For on-demand services, because the user has actually requested this material to view, it is partly their choice but there should be some age limits like PIN requirements and stuff." (Male, 35-44, parent, Belfast)

"It's a nanny state view. Why should on-demand be regulated prior to when I see it?"

(Male, 55-64, parent, Leeds)

10.7 Other internet

The future regulation of other internet AV content (beyond on-demand services) triggered the strongest debate between libertarian and protectionist participants. The protectionist participants emphasised the risks of other online AV content and sought increased regulation, whilst the libertarians espoused online freedoms and were wary of third-party intervention that could restrict content access.

Protectionists' views

Parents, and specifically those of more protectionist views, were most likely to consider other internet a priority area for increased regulation. They were mainly concerned with children accessing potentially inappropriate AV content online, and often lacked the technical aptitude or confidence to rely on access tools.

"More regulation for the internet [is needed] especially for children, they seem to spend more time watching YouTube videos than they do anything else." (Male, 35-44, parent, Belfast)

"Seems to be the internet is just getting away with it [being unregulated]." (Male, 35-50, non-parent, Belfast)

"Just because I know that there's a lot of like young kids and they just have access to anything on the internet and I just think that's really bad. I don't think that it should be like as high as live TV but I think it should definitely be more regulated than it is." (Female, 18-20, non-parent, Edinburgh)

However, the majority of protectionists favouring increased other internet regulation did appreciate the practical challenges of regulating the vast volume of content available online, and therefore started to look to other forms of protection. As a result, where scenarios raised the level of internet regulation 'as far as possible', the majority of protectionists perceived this as a sensible solution.

"They could try to regulate the internet a bit more. Even though that is really hard because it's hard to regulate what individual people post with technology I'm sure that there are filters that you can put up." (Female, 25-29, parent, London)

"When you think about the amount that is on TV, catch-up and on-demand as well and if it can all be regulated then why can't the internet be regulated?" (Female, 35-44, parent, Belfast)

"That's a bit realistic [Scenario 4Y] because they are indicating that they know you can't regulate the internet as much as people would like to because it's hard. You can't control what people post. But if you make an attempt." (Female, 25-29, parent, London)

Libertarians' views

The libertarian participants viewed the consumption of other internet content as a matter of free, active choice and expressed concerns over any third-party regulation of the internet. As a result, they were keenly opposed to any future scenarios that entailed increased regulation of other internet AV content.

"It was raised that the internet service provider could take more responsibility over the content of the internet and that's where again I disagree because that's what governments are forcing them to do and that's taking control of the internet and I don't agree with that." (Male, 55-64, parent, Belfast)

"I kind of like the freedom of the internet. You know I like to know that you can't be completely in the dark." (Male, 35-50, non-parent, Belfast)

"I think a lot of the ways of making the internet more easy to regulate, like diminish what's good about the internet. Like freedom and the ease of putting content up, ease of publishing something. Like YouTube videos so many of them are so topical and so current that if they had to go through like the sort of regulation that TV programmes go through to make them like comply with Ofcom regulations you wouldn't get them out as quickly." (Male, 18-20, non-parent, Edinburgh)

"It's just taking away people's freedom a bit more saying they can't watch this. If you want to watch this, no sorry, you're not allowed." (Male, 18-20, non-parent, Edinburgh)

Whilst recognising the potential risks of other internet content, the libertarians pointed to the active choice to consume content online and the role of tools in restricting access for children and other vulnerable individuals. Moreover, libertarian participants were concerned about the power that would be granted to those regulating other internet content, and its potential misuse for political purposes. Indeed, several libertarians identified the Chinese firewall (or Golden Shield Project) as an example of where 'regulation' of online content was censorship. A minority of protectionists cited China as an example of a country that applies a level of control of the internet.

All participants

Nonetheless, as noted above, across all participants, there were doubts over the practical feasibility of effectively regulating other internet AV content. Participants' doubts centred on the sheer volume of AV content available online, which could make the regulatory task almost impossible. Several participants also noted the international origins of other online AV content, which could require a concerted transnational approach to regulation rather than country specific guidelines.

"The internet is a law unto itself. It's impossible to police." (Male, 35-50, non-parent, Belfast)

10.8 Overarching themes

This section explores overarching issues relating to future protection and assurance that do not focus on a specific viewing platform. These issues include: contextual understanding of libertarian and protectionist perceptions of the current regulatory landscape; reactions to the idea of consistent standards across platforms and, finally; responses to an unregulated future.

Perceptions of existing arrangements

When considering future scenarios, it became evident that libertarian and protectionist participants had contrasting views on the existing regulatory landscape. Overall, the majority of participants were dissatisfied with existing arrangements, but this was fuelled by protectionists comprising around two thirds of the research sample. The majority of protectionists expressed concerns with current regulatory arrangements as a result of what they perceived as a lack of regulation of on-demand and, in particular, other internet content.

By contrast, the libertarian participants, who made up around a third of the sample, were broadly satisfied with existing protection and assurance. Indeed, the vast majority of libertarians advocated high levels of regulation for broadcast TV, and were satisfied that online freedoms were preserved by an absence of third-party regulation of other internet content.

"It's working well how it is just now." (Male, 18-20, non-parent, Edinburgh)

Responses to consistent standards across platforms

Several participants, and particularly those of protectionist leanings, embraced the idea of common regulatory standards across viewing platforms. These participants welcomed the simplicity and transparency delivered by applying the same standards regardless of how content was delivered. Older participants and the less technology engaged were most likely to favour consistent standards across platforms, given their lack of confidence and aptitude with regards to more cutting-edge internet-delivered content.

"I think logically it's correct in the sense that it shouldn't matter what the access method is or how it's been distributed and I think that's more of an evolutionary thing." (Male, 55-64, non-parent, Leeds)

"I think it's to do with our habits because...saying how television, the internet, what we're watching it on is moulding into one thing. So they need to be more consistent." (Male, 25-34, non-parent, London)

Despite this, protectionists (and some libertarians) responded negatively to the perceived lowering of broadcast TV standards, with broadcast TV regulation being viewed as highly important by a majority of all participants.

Whilst some libertarians appreciated the transparency afforded by common regulatory standards, as noted above, the vast majority expressed overarching concerns regarding any increased regulation of other internet content.

Reactions to the idea of an unregulated future

To gauge the full spectrum of reactions the final scenario (P6) entailed no regulation across all the viewing platforms. Protectionists expressed deep concerns at the idea of removing all regulation, given their desire to actually increase the current level of regulation. For the protectionists, any consistency and transparency offered by having no regulation across platforms was greatly outweighed by the risks of children and other vulnerable individuals being exposed to potentially inappropriate or objectionable content. Moreover, for older (35+) and less technology engaged participants, a perceived reliance on access tools to restrict access caused considerable anxieties.

"But basically what we want to do is make internet better, not make everything as bad as internet is." (Male, 16-17, non-parent, Cardiff)

"No-one would be protected from anything like children or people, like contains flash images, people wouldn't expect it. So there wouldn't be any sort of protection of anything." (Female, 18-20, non-parent, Cardiff)

Only the most ardent libertarians, accounting for a tiny fraction of the research sample, advocated a regulation-free landscape. These individuals were most likely to be young, male and highly technology engaged, and focused on retaining their rights to actively choose to access content. However, the majority of libertarians actually favoured at least some minimum level of regulation, especially for broadcast TV. Indeed, whilst libertarians naturally leaned towards freedoms of choice, they maintained that some standards protections should be in place to protect children.

10.9 Summary and final choices

Following the above discussion, participants were asked to individually rank the scenarios from their most to least preferred. The figure below details the rankings based on proportion of first preferences – i.e. the proportion of participants selecting each scenario as their 'most preferred'. Note: This is a qualitative piece of research and reporting on these choices is designed to give an indication of preferences. It is not statistically robust.

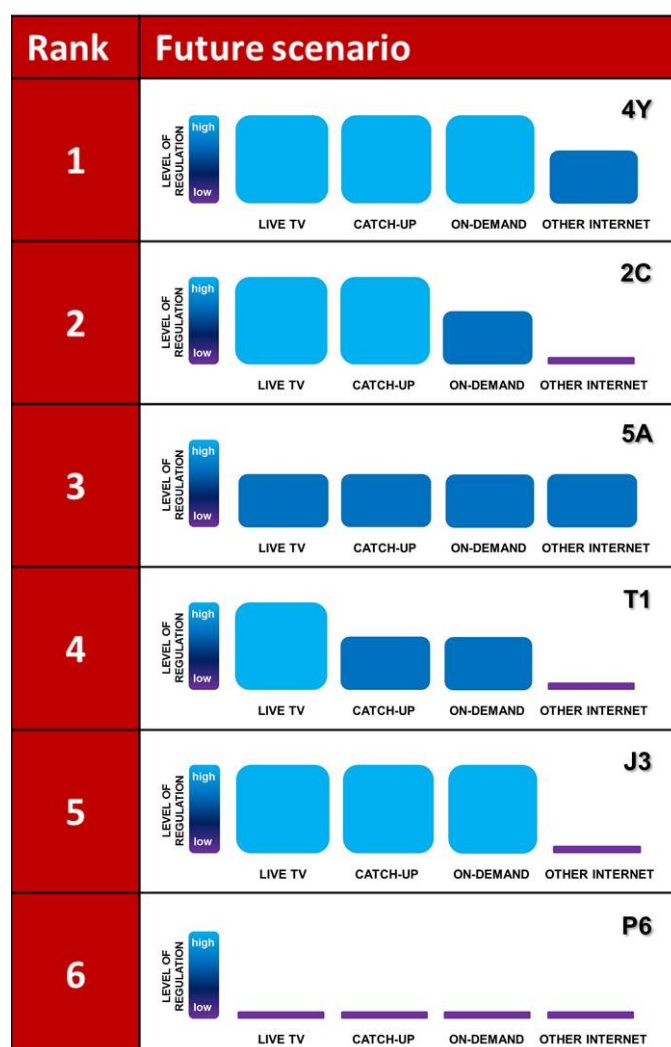


Figure 14: Future scenarios ranking – top preferences

The research sample comprised around two thirds of people with a more protectionist viewpoint (more likely to be female, aged 35 and over, parents, and low technology engagers) and around a third of people who were more libertarian (more likely to be male, aged under 35, non-parents, and high technology engagers).

Half the participants – predominantly protectionists – selected 4Y as their most preferred scenario. This suggests that the majority of the participants favoured further regulation for catch-up, on-demand and AV content from other internet sources. This is set within the context of the wide recognition across all participants of the challenges of regulating other internet AV content. Participants ranking 4Y as their preferred option were most likely to be older (35+), females, parents, and low technology engagers.

The remaining first choices were split fairly evenly between scenarios 2C, 5A, T1, and J3, with a very small minority of participants favouring P6. Combining the scores for scenario T1 and 2C, around a quarter of participants (mainly libertarians) favoured a future closely resembling the status quo.

Indeed, the preferences for T1 and 2C were split between those simply favouring no change, and those contending that catch-up is, in effect, actually regulated to the same level as broadcast TV currently. Combining the scores for 2C, T1, J3 and P6, a significant proportion (around a third of participants) were opposed to regulation of other internet content and favoured alternative forms of protection to address content standards of most concern.

Glossary of key terms

A glossary of key terms used throughout the report is provided below, given the complexity of the subject area. For consistency, where applicable, the definitions match those given to participants during the research.

Table 4: Glossary of key terms

| Term | Definition |
|----------------------------------|---|
| Audio-visual (AV) content | Content that you can watch and/or listen to, e.g. a programme, clip, video, etc. |
| Catch-up | Usually refers to services that allow people to watch or listen to content when they want after the initial TV broadcast. |
| Channel/service | A service which schedules and distributes TV content (programmes and adverts), e.g. BBC One, ITV, Channel 4, BBC4, Sky 1, Sky Atlantic, Dave, E4, etc. |
| Content information | Any type of information that is given about the type or suitability of content for a given audience, usually in the form of a warning or a rating. |
| Device | The technical equipment that is used to receive and deliver content, e.g. a TV, Smart TV, set-top box, desktop/laptop, tablet, smartphone, etc. |
| Libertarians | Those agreeing that government and public institutions should play a <i>minimal</i> role in people's lives, with people free to make their own choices and decisions. Most likely to favour minimal regulation for 'other internet' content and on-demand content where an active decision to view has been made. |
| Broadcast TV | In the context of this study, does not mean 'as it is happening right now' (e.g. live sports), but 'as it is broadcast right now'. This is used in contrast to a recorded programme or a programme accessed via a catch-up or on-demand service. |
| On-demand | Usually refers to services that allow people to watch or listen to content whenever they want and is not necessarily content previously broadcast on TV. |
| 'Other internet' content | Non-TV like content sourced from the internet, e.g. videos or clips from services such as Facebook, YouTube, Google Videos, etc. |
| Platform | In the context of this study, means the type of viewing or means by which content is delivered (e.g. broadcast TV, catch-up, on-demand, or 'other internet'). |
| Protectionists | Those agreeing that government and social institutions should play an <i>active</i> role in people's lives, as they can be better equipped to make decisions on people's behalves. Most likely to favour regulation of 'other internet' content. |
| Regulation | Protection carried out by an authority or governing body, often called a 'watchdog', which can set rules or guidelines about content. People can contact the 'watchdog' if they wish to complain about content. |
| Standards protections | Usually applied through rules by either an official regulatory body such as Ofcom or self-imposed rules applied by a media company who provides the content. |
| Tools/access tools | A mechanism that blocks access to content unsuitable for viewing by minors or vulnerable individuals, such as parental locks, PINs and filters. |
| UK law/The law/Common law | The law developed by judges through courts and tribunals, as opposed to statutory law. |