

OFCOM

SURVEY NAME: OFCOM VOD SURVEY 2025 – CHILDRENS SCRIPT

SURVEY FIELDWORK: 17TH FEB – 24TH FEB 2025

METHODOLOGY: ONLINE ADHOC

SURVEY LENGTH: 20 MINUTES

ONLINE SAMPLE: 2000 UK NATIONALLY REPRESENTATIVE ONLINE SURVEY WITH PEOPLE AGED 13+, WITH BOOSTS TO BRING WALES AND NORTHERN IRELAND TO N=150 EACH. QUOTAS ON AGE, GENDER, REGION, SEG TO CREATE NATIONALLY REPRESENTATIVE QUOTAS

NATION BOOSTS OF UPTO 150 IN WALES & NORTHERN IRELAND

JN: 014381

Introduction – for parent

Today we are looking for teenagers aged 13-17 years to take part in this survey. This survey is asking people about their use of and attitudes towards different types of online TV services, known as 'video on demand' or 'streaming' services. This can include things like BBC iPlayer, Netflix and YouTube and many more.

Please note, this research will contain questions based upon your child's physical and mental health and ethnicity, for market research purposes only. This data is always anonymised, and we never report data on an individual level, in line with our privacy policy.

Please be assured this is genuine research being conducted for Ofcom, the regulator for the UK's communication industry. We are not trying to sell you anything and there will be no sales follow-up as a result of taking part.

Participation is voluntary and your child does not need to take part.

If there is more than one child in your household aged 13-17 years, please select one child to take part in this survey.

Are you happy for a child aged 13-17 years in your household to take part in this survey?

1. Yes
2. No

Demographics – to be completed by the parent

D1. What is the total number of people in your household, including yourself and any children?

OPEN NUMERIC

[ASK ALL]

D2. Do any children aged under 16 live in your household?

Please select all that apply

Yes, aged 0-2	1
Yes, aged 3-4	2
Yes, aged 5-10	3
Yes, aged 11-15	4
Yes, aged 16-17	5
No children aged under 18 (SINGLE CODE)	6
Don't know (SINGLE CODE)	7
Prefer not to say (SINGLE CODE)	8

[ASK ALL]

D3. What is the gender of the child completing the survey?

1. Girl
2. Boy
3. Prefer to use another term (please state – optional)
4. Prefer not to say

[ASK ALL]

D4. How old is the child completing the survey?

Please enter their age in years _____

[ASK ALL]

D5. Which of these best describes the chief income earner in your household?

If you/ they are retired and living on a private pension, please choose your description based on what you/ they did before you/ they retired.

If you/ they have been unemployed for six months or less, please choose your description based on your/ their most recent main job.

Please select one option

		Social Grade
High managerial, administrative or professional - e.g. doctor, lawyer, company director (50+ people), judge, surgeon, school headmaster etc.	1	A

Intermediate managerial, administrative or professional - e.g. school teacher, office manager, junior doctor, bank manager, police inspector, accountant etc.	2	<i>B</i>
Supervisor, clerical, junior managerial, administrative or professional - e.g. police officer, nurse, secretary, clerk, self-employed (5+ people) etc.	3	<i>C1</i>
Skilled manual worker - e.g. mechanic, paramedic, cook, fitter, plumber, electrician, lorry driver, train driver, hairdresser, beautician, etc.	4	<i>C2</i>
Semi-skilled or unskilled manual worker - e.g. baggage handler, restaurant server, factory worker, receptionist, labourer, gardener etc.	5	<i>D</i>
Housewife/househusband	6	<i>E</i>
Unemployed	7	<i>E</i>
Student	8	<i>C1</i>
Retired and on state pension ONLY (If retired but not only on state pension, please indicate the occupation just before retirement)	9	<i>E</i>
Don't know	10	<i>X</i>

[ASK ALL]

D6. Which one of these bands describes your total household income before tax or any other deductions are made?

Please include any benefits or credits that you or anyone else in your household receives, including housing benefit, as well as any income from employment.

Please select one option

	Per week	Per Year
1	Up to £199	Up to £10,399
2	From £200 to £299	From £10,400 to £15,599
3	From £300 to £499	From £15,600 to £25,999
4	From £500 to £699	From £26,000 to £36,399
5	From £700 to £999	From £36,400 to £51,999
6	From £1,000 to £1,499	From £52,000 to £77,999
7	£1,500 and above	£78,000 and above
8	Don't know	
9	Prefer not to say	

[ASK ALL]

D7. Which region do you live in?

Please select one option

North East	1
North West	2
Yorkshire and the Humber	3

West Midlands	4
East Midlands	5
East of England	6
South West	7
South East	8
London	9
Wales	10
Scotland	11
Northern Ireland	12

ADD ETHNICITY INTO QDATA SCREEN
[ALL RESPONDENTS GIVING CONSENT]

D8. Which one of these groups best describes your child's ethnic group or background?

Please select one option

WHITE	
English/ Welsh/ Scottish/ Northern Irish/ British	1
Irish	2
Gypsy, Traveller or Irish Traveller	3
Any other white background	4
MIXED/ MULTIPLE ETHNIC GROUPS	
White and Black Caribbean	5
White and Black African	6
White and Asian	7
Any other mixed/ multiple ethnic background	8
ASIAN AND BRITISH ASIAN	
Indian	9
Pakistani	10
Bangladeshi	11
Chinese	12
Any other Asian background	13
BLACK AND BLACK BRITISH	
Caribbean	14
African	15
Any other black/ African/ Caribbean background	16
OTHER ETHNIC GROUP	
Arab	17

Any other ethnic background	18
Prefer not to say	19

ADD DISABILITY INTO QDATA SCREEN

[ALL RESPONDENTS GIVING PERMISSION]

D9. Do any of these impact or limit your child's day-to-day activities? These could affect your child on an ongoing basis or at particular times

Please select all that apply

Answer list	Code
Hearing: Partial hearing, having tinnitus or are D/deaf	1
Eyesight: Colour blindness, partial sight, or are blind	2
Speech: Difficulty with speech for example due to a stroke, stutter or stammer	3
Mobility: Cannot walk at all, use a wheelchair or mobility scooter, cannot walk very far or manage stairs or can only do so with difficulty	4
Dexterity: Limited ability to reach, difficulty opening things with your hands, difficulty using a telephone handset, television remote control or computer keyboard	5
Breathing: Breathlessness or chest pains	6
Other physical condition (OPEN TEXT BOX)	7
Memory/cognitive: learning, understanding, concentration, memory, communicating, cognitive loss or deterioration	8
Neurodiversity: such as autism, attention deficit disorder (ADHD), dyslexia	9
Your mental health: such as anxiety, depression, trauma-related conditions	10
Other long-term conditions which impact or limit your daily activities or the work you can do: such as diabetes, epilepsy, cancer, heart condition, auto-immune conditions (OPEN TEXT BOX)	11
Nothing – no conditions that impact or limit your daily activities or the work you can do (SINGLE CODE)	12
Prefer not to say (SINGLE CODE)	13

[ASK ALL]

D11. How many hours in a typical week would you say your child spends online?

This includes time using social media and messaging, watching films, TV programmes and videos online, playing games online, on video calls, searching for information online and doing schoolwork.

*This could be using a mobile phone, laptop, tablet (like an iPad), computer, games console or Smart TV.
Please think about weekdays and weekends, either at home or anywhere else.*

None	1
Up to 2 hours	2
3 to 5 hours	3
6 to 8 hours	4
9 to 11 hours	5
12 to 15 hours	6
16 to 22 hours	7
Over 22 hours	8
Don't know/ unsure	9

INFO SCREEN

Please pass the survey over to your [ENTER GENDER + AGE OF CHILD FROM SAMPLE E.G. MALE CHILD AGED 15] and ask them to click the next button when ready. If they are not available currently please close the survey and re-open once they are available.

Note – we are after the child's opinions. However please do help them if they need assistance understanding the questions.

As a reminder, all answers will be anonymous and will not be attributed to them in any way. We will also store the data in accordance with our data privacy policy [add link here].

Introduction – for 13–17-year-olds

[IF 13-17 YEARS]

Today we would like to ask you some questions about your use of and attitudes towards different types of online TV services, known as 'video on demand' or 'streaming' services. This can include things like BBC iPlayer, Netflix and YouTube and many more. These services can be used via many different types of devices, for example on your TV set or through apps and sites on your smartphone or other internet-connected devices.

Your parent has said it's okay for you to take part and has answered a few questions on your behalf including questions about your physical and mental health and your ethnicity, for market research purposes only. This data is always anonymised and we never report data on an individual level, in line with our privacy policy.

Can we just confirm you are a [ENTER GENDER + AGE OF CHILD FROM SAMPLE E.G. MALE CHILD AGED 15] and are happy to take part in this survey?

1. Yes
2. No

Section 1 – Consumption

CATI AND ONLINE

[ASK ALL]

Q1a. Firstly, can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months?

If you have accessed a particular service by going through another service, e.g. BBC iPlayer through Freely, or ITVX through Apple TV, please think about the service that provided the content, such as BBC iPlayer or ITVX.

MULTICODE

RANDOMISE ORDER WITHIN GROUPINGS (CODES 2,3,4,5 TO BE LOCKED TOGETHER IN SAME ORDER AS LISTED HERE)

GROUP 1:

1. BBC iPlayer
2. ITVX (formerly known as ITV Hub) **LOCK WITH CODE 3,4,5**

3. ITVX Premium (formerly known as ITV Hub+) LOCK WITH CODE 2,4,5
4. STV Player LOCK WITH CODE 2,3,5
5. STV Player VIP LOCK WITH CODE 2,3,4
6. Channel 4 streaming (formerly known as All 4/4OD)
7. Channel 4+ (paid for service, formerly known as All 4+) LOCK WITH CODE 6
8. My5
9. S4C Clic
10. Sky on Demand or Sky Go
11. Virgin TV On Demand / Catch Up or Virgin TV Go
12. U (previously known as UKTV Play)
13. None of these (FIXED AT THE END OF THIS GROUPING)

GROUP 2:

14. Netflix
15. Amazon Prime Video
16. Freevee
17. Disney+
18. NOW Cinema LOCK CODES 18-20
19. NOW Entertainment
20. NOW Sports
21. Apple TV+
22. Discovery+ (free content) LOCK WITH CODE 23
23. Discovery + (paid for service)
24. TNT Sports (formerly known as BT Sport)
25. Paramount+
26. YouTube (not YouTube premium content) LOCK WITH CODE 27
27. YouTube Premium (paid for service for YouTube videos without ads)
28. None of these (FIXED AT THE END OF THIS GROUPING)

GROUP 3:

29. Acorn TV
30. Pluto TV
31. Rakuten TV (to watch free programmes)
32. Rakuten TV (to rent/buy films) LOCK WITH CODE 31
33. Apple Fitness+
34. Crunchyroll
35. Tubi
36. Hayu
37. Shudder
38. MGM+
39. BFI Player
40. TED Talks (not on YouTube)
41. Facebook Watch
42. RTE Player
43. Freeview Play
44. The Roku Channel
45. Viaplay
46. Samsung TV Plus
47. Other, please state (FIXED AT THE END OF THIS GROUPING)
48. None of these (FIXED AT THE END OF THIS GROUPING)

CATI AND ONLINE

[ASK ALL WHO SELECTED A SERVICE IN Q1A]

Q1b. And how often in the past 3 months, have you used the services below to watch programmes, films or other video content?

[SHOW FOR ALL SERVICES SELECTED IN Q1A]

GRID ROWS – SERVICES USED IN Q1A

GRID COLUMN

SINGLE CODE

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often

CATI AND ONLINE

[ASK ALL]

Q2a. Which, if any, of these online services have you personally used to watch live or catch-up sports events in the past 3 months?

MULTICODE

RANDOMISE ORDER (CODES 2,3,4,5 TO STAY TOGETHER IN SAME ORDER)

- 1. BBC iPlayer
- 2. ITVX (formerly known as ITV Hub)
- 3. STV Player
- 4. ITVX Premium (formerly known as ITV Hub+) LOCK WITH CODE 2
- 5. STV Player VIP
- 6. S4C
- 7. Channel 4 streaming (formerly known as All 4)
- 8. Channel 4+ (formerly known as All 4+) LOCK WITH CODE 7
- 9. Sky Sports via an app/website, including NOW and Sky Go
- 10. Netflix
- 11. Amazon Prime Video
- 12. Apple TV+
- 13. Premier Sports
- 14. F1 TV
- 15. NBA League Pass
- 16. Twitch
- 17. Pick TV
- 18. UFC Fight Pass
- 19. DAZN
- 20. Discovery+ (including TNT Sports or Eurosport)
- 21. YouTube (full event not clips/highlights)
- 22. Facebook

23. UEFA.TV
24. FA Player
25. WWE Network
26. NFL Gamepass
27. FIFA+
28. Website/app of a team I follow (including via iFollow)
29. Live stream on social media (e.g. TikTok, X)
30. Other, please state (FIX AT END)
31. None of these (FIX AT END)

CATI AND ONLINE

[ASK ALL WHO SELECTED A SPORT SERVICE IN Q2A]

Q2b. And how often in the past 3 months, have you used the services below to watch sports live or catch-up sports events? [SHOW FOR ALL SERVICES SELECTED IN Q3]

GRID ROWS – SHOW SERVICES USED IN Q2A

GRID COLUMNS

SINGLE CODE

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often

[ASK ALL]

Q4. Do you generally prefer UK- or USA-made programmes/series?

SINGLE CODE

1. UK-made
2. USA-made
3. I like them both the same
4. Don't know

END SURVEY HERE FOR THOSE WHO DO NOT WATCH ANY VOD SERVICES - REST OF SURVEY FOR VOD USERS ONLY (REGARDLESS OF FREQUENCY)

[PROGRAMMERS: The only people routed out and excluded from this point are those selecting “None of these” at Q1a, all others are to continue]

Section 2 – How services are used

[ASK ALL]

Q5a. Were you aware that you could watch channels or programmes live at the time they are broadcast on online video/streaming services such as BBC iPlayer or ITVX (formerly ITV Hub)?

SINGLE CODE

1. Yes I was aware and I **do** it
2. Yes I was aware but I **don't** do it
3. No I was not aware

[ASK ALL]

Q6. Which of these devices do you use to watch the following services?

GRID ROWS - SHOW SERVICES USED IN Q1/Q2 (just groups 1 & 2)

1.
2.
3.
4. Etc.

GRID COLUMNS – MULTICODE

- a. Smartphone
- b. TV set
- c. PC/desktop computer
- d. Laptop
- e. Tablet
- f. Smart speaker with a smart display
- g. Handheld games console

[ASK ALL]

Q6b. And, in the last 3 months, which of these services have you watched at home or someone else's home?

SINGLE CODE

SHOW SERVICES USED IN Q1 & Q2

1.
2.
3.
4. None of these

[ASK ALL]

Q6c. And, in the last 3 months, which of these services have you watched outside the home, such as on public transport or in a pub or other venue?

SINGLE CODE - SHOW SERVICES USED IN Q1 & Q2

1.
2.
3.
4. None of these

[ASK ALL, SHOW SERVICES USED IN Q1/Q2 BUT EVERYONE SHOWN CODE 1 TV CHANNELS]

Q7. Which of these would you normally go to first if you wanted to watch something, but didn't have a specific programme in mind?

SINGLE CODE

1. TV channels (e.g. BBC One, BBC Two, ITV1, Channel 4, Channel 5, Dave)
2.
3.
4.
5. Etc.

[ASK ALL, ONLY LIST SERVICES THEY SAID THEY USED IN Q1/Q2, BUT EVERYONE SHOWN CODE 1 TV CHANNELS]

Q8. Which of these reasons best describes how you choose what to watch on the following?
MULTIPLE CHOICE GRID

GRID ROWS - RANDOMISE ORDER

1. TV channels/live TV (e.g. BBC One, BBC Two, ITV1, Channel 4 or Channel 5, Dave)
2. BBC iPlayer
3. ITVX (formerly ITV Hub)
4. Channel 4 streaming (formerly known as All 4)
5. My5
6. Netflix
7. Amazon Prime Video
8. Disney+
9. YouTube (for watching TV programmes /films)

GRID COLUMNS – RANDOMISE ORDER

1. I have specific shows I watch regularly on there
2. I catch up on recent episodes of shows I've missed **(DO NOT SHOW FOR CODE 1: TV CHANNELS & CODE 6: NETFLIX, CODE 7: AMAZON & CODE 8: DISNEY+)**
3. I catch up on past series of shows
4. I browse/scroll until I find something that catches my eye
5. I look at the 'recommended for you' section on the service **[DO NOT SHOW FOR CODE 1: TV CHANNELS]**
6. I see shows on these channels/services promoted in trailers or adverts or notifications or the homepage
7. I look in newspapers or magazines for recommendations
8. Friends or family recommend things to me
9. I see mentions on social media of shows on these channels/services
10. Someone else decides
32. Other **(FIX AT END)**

Q8 OTHER FOLLOW ON

You mentioned you choose what to watch on **[SERVICE]** in another way, how do you choose what to watch?

[ASK ALL]

QX. What form of content have you watched on YouTube in the past 3 months?

MULTICODE

NON-RANDOMISE

1. YouTube Shorts (short-form videos of 60 seconds or less)

2. YouTube videos up to 15 minutes long (but not YouTube Shorts)
3. YouTube videos longer than 15 minutes (but not full-length programmes or films)
4. Programmes or films (full length not clips/highlights)
5. I have not used YouTube in the past 3 months
6. Don't know

[ASK those who selected 1 – 4 and 6 AT QX]

QX.1: What type of content have you watched on YouTube in the past 3 months?

1. Funny videos/ jokes/ pranks/ challenges
2. "How to" e.g. recipes, DIY
3. Videos uploaded by the general public including friends/family
4. Music
5. Vlogs/other videos uploaded by social media influencers that you follow
6. Programmes or clips of programmes of any genre from TV broadcasters e.g. Channel 4, BBC
7. Videos about video games or other people playing video games
8. Children's programmes or films
9. Trailers or reviews
10. Interviews of documentaries not available to watch for free anywhere else
11. Podcasts
12. Other (please specify)

[ASK ALL] YouTube gaming

Q11e Have you played any games offered by YouTube?

SINGLE CODE

1. Yes
2. No
3. Don't know

[ASK ALL]

Q9. Which of the following statements do you agree with on a scale of 1 to 10 (where 10 is strongly agree and 1 is strongly disagree)?

(AGREEMENT SCALE 1-10)

SINGLE CODE

RANDOMISE ORDER

1. Video on demand services are the main way I watch programmes and films
2. I like the convenience of being able to watch programmes on different devices
3. I prefer to **watch** programmes live at the time they are broadcast **on TV**
4. I prefer to **stream** programmes live at the time they are being broadcast **via streaming services**
5. I would miss video on demand services if I no longer had access to them
6. I find the amount of content available on video on demand services overwhelming
7. Video on demand services allow me to watch a greater variety of content
8. I would miss my normal TV channels (e.g. BBC, ITV, Channel 4, Channel 5) if they weren't available
9. I spend too much time searching for something to watch on video on demand services
10. There are too many video on demand services
11. It is difficult to remember which video on demand service shows the TV programmes/films I want to watch

12. I spend too much money subscribing to video on demand services
13. Video on demand services have more content relevant to me, compared to broadcast TV channels

[ASK ALL]

Q10a. You said you use [SERVICE]. How good or bad is [SERVICE] on each of the following?

ASK FOR EACH OF THE FOLLOWING SERVICE IF USED:

1. BBC iPlayer
2. ITVX (was ITV Hub)
3. ITVX Premium (formerly known as ITV Hub+)
4. Channel 4 streaming (formerly known as All 4)
5. Channel 4+ (paid for service, formerly known as All 4+)
6. My5
7. Netflix
8. Amazon Prime Video
9. Disney+
10. YouTube (for watching TV programmes /films)
11. Paramount+
12. Discovery+

GRID ROWS – RANDOMISE ORDER

- A. Range of content
- B. Ease of use, including functions such pause, rewind, fast-forward.
- C. Ease of finding the content I am particularly looking for
- D. Ease of discovering new content
- E. Exclusive content only available through that platform
- F. Personalisation options – it gets to know my tastes
- G. Cost of the service [DO NOT SHOW FOR CODE 6: My5, CODE 4: Channel 4, CODE 2: ITVX, CODE 10: YouTube]
- H. Amount of adverts

GRID COLUMNS – SINGLE CODE

- A. Very good
- B. Quite good
- C. Neither good nor poor
- D. Quite poor
- E. Very poor

Section 3 – Netflix

[ASK ALL THAT PAY NETFLIX DIRECTLY – CODE 1 IN Q11A]

Q11d. Have you played any games offered by Netflix? If you have, which one(s)?

MULTICODE

1. Stranger Things: 1984 or Stranger Things 3: The Game or Stranger Things: Puzzle Tales
2. Too Hot to Handle: Love is a Game or Too Hot to Handle 2
3. Netflix Stories e.g. Emily in Paris, Selling Sunset, Love is Blind
4. Money Heist: Ultimate Choice
5. Grand Theft Auto III or San Andreas or Vice City – The Definitive Edition
6. Educational games e.g. This is a True Story, CoComelon: Play with JJ
7. Football Manager 2024

8. Squid Game: Unleashed
9. Arcade e.g. Bowling Ballers Teeter Up, Shooting Hoops, Bloons TD 6, Skies of Chaos, Sonic Prime Dash, World of Goo Remastered
10. Other Netflix games e.g. card games, FashionVerse, OXENFREE, Vikings Valhalla, The Queen's Gambit Chess, Into the Dead 2: Unleashed, Dragon Up, Dungeon Dwarves
11. I knew Netflix offered games but I haven't played any
12. I haven't played any games and didn't know Netflix offered games

[ASK ALL]

Q24a. When you're looking for something new to watch on TV, how often do you use/look at the following:

GRID ROWS

1. On-screen channel guide (electronic programme guide, or EPG)
2. A specific TV app (e.g. BBC iPlayer or Netflix)
3. Programme-led electronic lists/menus (i.e. lists/menus of individual programmes shown on e.g. smart TV home screen or Amazon fire TV home screen)
4. Search by typing
5. Voice search

GRID COLUMNS

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often
- h. Never

Section 8 – Audiovisual translation

[ASK ALL]

Q25. Now thinking about all of the video-on-demand services you use, in the last 12 months have you used dubbing or subtitling for films/programmes?

MULTICODE

GRID ROWS

1. Dubbing – (audio) voice translating the original language the film/programme was recorded/filmed in into a different language
2. Subtitling - displaying text on screen which matches or translates what is being voiced (audio)

GRID COLUMNS

1. Yes
2. No
3. Don't know

[SHOW IF SELECTED 'YES' FOR CODE 2 AT Q25]

Q25a You said you used subtitling to watch films/programmes on video-on-demand service in the last 12 months, when watching English language content did you use subtitling for any of the following reasons?

Please note the next question will ask about non-English language content

MULTICODE

1. Poor hearing, partial hearing, or are deaf **[SHOW ALL]**
2. Could not understand what was said due to accent, sound being low etc.
3. To help improve/practice reading or spelling
4. Used subtitling in non-English language
5. Did not use subtitling for English language content
6. Other (please specify)

[ASK ALL]

Q26. Have you used any video on demand service to watch non-English language films/programmes in the last 12 months?

For example, some services such as Netflix include content originally recorded in a non-English language (e.g. Squid Game, Money Heist or Lupin). This could include content you have watched where you have used English dubbing.

SINGLE CODE

1. Yes
2. No
3. Don't know

[ASK ALL WATCHING NON-ENGLISH CONTENT IN Q26 CODE 1]

Q27. How did you watch the films/programmes?

MULTICODE

1. I watched with English dubbing
2. I watched with English subtitles
3. I watched with non-English dubbing
4. I watched with non-English subtitles
5. I understood the non-English language (no dubbing/subtitling required)
6. Other

[ASK ALL WHO ANSWERED YES FOR SUBTITLING IN Q25 CODE 2]

Q28. Have you used subtitling on any of the following services while watching films/programmes in the last 12 months? Please select all that apply

MULTICODE- RANDOMISED

1. Netflix
2. Amazon Prime Video
3. Disney+
4. BBC iPlayer

5. ITVX / ITVX Premium
6. Channel 4 streaming / Channel 4 + (formerly known as All 4 / All 4+)
7. My5