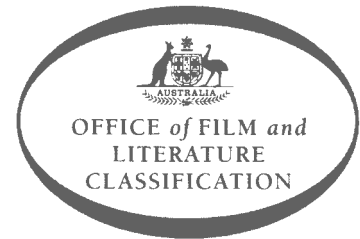




# **CLASSIFICATION USAGE & ATTITUDE STUDY**

**Prepared: November 2002**



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## **EXECUTIVE SUMMARY**

- The Office of Film and Literature Classification has recently conducted quantitative market research to better understand how Australians use and feel about the current classification system. A national telephone study using Newspoll's adult omnibus service was conducted in both metropolitan and rural areas of Australia's six States and two Territories between the period 13 to 15 September 2002. A total of 1200 people aged 18 years and over participated in the study. In addition to better understand the views of youth in the community, a sample of around 400 teenagers aged from 13 to 17 year was also interviewed in Sydney and Melbourne from 16 to 18 September. The methodology employed allows for results to be projected to the youth and adult populations of Australia

The key findings of this research are as follows:

### **Sources of Influence for Adult Film Selection**

- Respondents were presented with a range of options and asked to nominate those that were influential when choosing a film for themselves (adults and youth) and amongst parents for their child or children. In addition they were asked to select the most influential factor with only one response allowed.
- A variety of factors influence adults' decisions on choice of film. Word of mouth plays the strongest role (67%) along with convenience factor, ie location of cinema and time of session (59%). TV trailers (55%) are also strongly motivating, indicating the need for a system to ensure all trailers are classified before airing.
- Around two in ten (22%) nominate classification rating as influential.
- When asked to select the single most influential factor, word of mouth emerges as the most important (26%) with trailers on TV (16%) and film reviews (10%) playing support roles.

### **Sources of Influence for Selection of Children's Films by Parents**

- Child request (69%) is the strongest factor for choice of film. The majority (61%) of Australian parents nominate classification rating as influential with word of mouth (60%) closely following in order of influence. TV trailers are also frequently mentioned by a large proportion of parents (54%).
- Child request maintains its level of influence when parents are asked to select the most important factor. The classification rating (18%) is the second most important factor at the most influential level.
- Nomination of classification rating as a source of influence is highest amongst parents with children aged 10 to 12 years (75%) and lowest amongst parents with children under 5 years (49%). As children move into teen years, parents are less likely to include classification rating as an influential factor.



### Sources of Influence for Youth Film Selection

- TV trailers (88%) are by far the most important factor for the youth segment followed by recommendation from friends or relatives (80%), trailers at the cinema (76%) and convenience factor (73%). Only one third (33%) nominate classification rating as an influential source.
- A similar pattern emerges for most important influence with TV trailers being top of the list (42%). This further reinforces the need for a system to appropriately promote the classification of the film with the advertising trailer aired on TV. Only 2% nominate classification rating.

### Comparison of Most Influential Sources by Key Segments

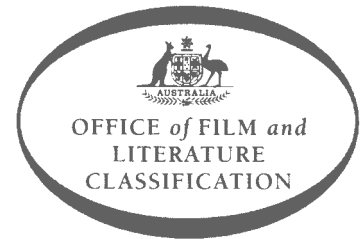
- Very different patterns emerge across the three segments. Responses were grouped under three headings to better understand the different types of influences amongst each group. External sources such as trailers on TV and cinema, billboards/posters and session time and place have been grouped under Marketing Influences. Word of mouth and child requests are grouped together under Informal Influences while film review and classification rating appear together as Independent Influences.
- Overall marketing influences have the strongest impact on the youth segment (72%). These influences are also strongly motivating for adults (36%) but less influential amongst parents (14%).
- Informal sources (44%) are much stronger for parents driven by child request (31%).
- Independent sources are almost as equally as important for adults (17%) and parents (21%) but for different reasons. Film reviews (15%) are more influential for adults while the classification rating is a strong influence for parents (18%).
- Word of mouth (26%) is dominant source of influence for adult film selection. Child request (31%) is top of the list for parents with classification rating (18%) being the second most important factor. Amongst the youth segment TV trailers (42%) exert the strongest influence.

### Sources of Influence for Youth Computer Game Selection

- Friends and relatives is the most influential factor (75%) followed by TV advertising (62%). Around one quarter (24%) nominate classification rating.

### Attitudes towards the OFLC and Classification

- There is almost universal recognition (94%) amongst the Australian 18+ population of the benefits of classification. The majority also believe the OFLC fulfils an important community role (85%) and have confidence in its rating decision making abilities (72%).
- The youth segment is also largely very supportive towards the usefulness of classification symbols (93%), the OFLC's role in providing (85%) and appropriately deciding (80%) on film/game classifications.
- Parents are overall more positive towards the OFLC and classification than adults generally and the youth segment. Older Australians aged over 50 years express less favourable attitudes towards the OFLC and the classification issues examined however this is considered to be due to less relevance rather than negative views.



## 1. **Research Background**

The OFLC commissioned consumer research to better understand the Australian community's film selection behaviour, ie what are the key sources of influence when choosing a film for themselves or their family, as well as attitudes towards classification and the OFLC. Both adult and youth populations were surveyed. Sources of influence for computer game selection was also covered amongst the youth segment.

The insights gained from this research will also be used in a number of practical ways such as input into:

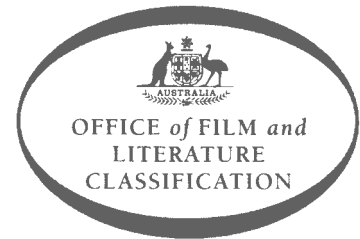
- The Advertising Review
- Developing new determined markings for films and computer games
- Developing further targeted education activities
- Potential changes to the scheme that allows trailers to be advertised prior to being classified
- Additional direction for upcoming qualitative research on consumer language

## 2. **Research Objectives**

The key objectives of the research were to determine:

- Sources of influence for selecting films for personal viewing (adults and youth) and amongst parents for children from the following
  - TV advertising/trailers
  - Cinema trailers
  - Classification rating
  - Film reviews
  - Word of mouth (note: this is interpreted as either recommendation or approval of film by someone who has seen a particular film and whose opinion is of some value)
  - Convenient time and place
- Amongst youth, sources of influence for selecting computer games to buy or hire
- Attitudes towards the OFLC and classification
  - Role of the OFLC
  - Usefulness of classification symbols
  - Ability of OFLC to decide on film classification for different audiences
  - Appropriateness of current system to limit children's access to unsuitable material

Standard demographics for analysis purposes include sex, age, respondent occupation, work status, household income, parental status and residential area.



### **3. Research Design and Methodology**

#### **3.1 Overview**

A national consumer survey was conducted using Newspoll's telephone omnibus with adults aged 18 years and over. A total of 1200 adults was interviewed during the period 13 to 15 September 2002.

(An omnibus is a survey where a number of clients wanting to find out views of consumers contribute to a weekly questionnaire, each participating client including their own exclusive questions. Respondents who participate in the study are not part of a panel. A different sample of consumers is recruited for each omnibus study.)

In addition a sample of N=398 teenagers aged 13 to 17 years in Sydney and Melbourne was interviewed by telephone on Newspoll's Youth Omnibus from 16 to 18 September.

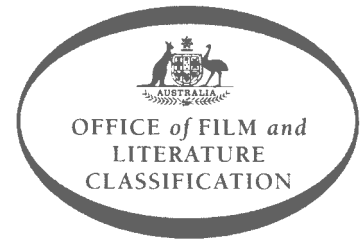
#### **3.2 Sample Design**

Respondents were selected by means of a stratified random sample process which included:

- A quota set for each capital city and non-capital city area. Within each of these areas a quota set for each telephone area code;
- Random selection of household telephone numbers drawn from current telephone listings for each area code;
- Random selection of an individual in each household by a "last birthday" screening question;
- To ensure the sample included those people who tend to spend a lot of time away from home, a system of call backs and appointments was incorporated.

#### **3.3 Questionnaire**

A structured questionnaire was used to administer the survey questions and is appended to this report.



### **3.4 Fieldwork and Analysis**

All interviews were conducted by trained interviewers at Newspoll’s central telephone facility in Sydney. Data was captured using Newspoll’s CATI system. A minimum of 10% of each interviewer’s work is validated by telephone audit each wave.

All data was processed in the Sydney office of Newspoll with output in the form of computer tabulations.

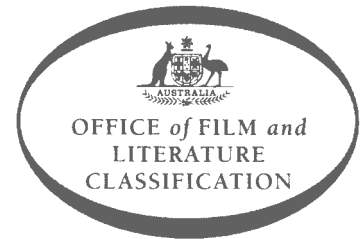
### **3.5 Weighting Factors and Projections**

To reflect the population distribution (adult and youth samples), results were post-weighted to Australian Bureau of Statistics data on age, age left school, sex and area. Survey results can therefore be projected to the 18+ population at large (14,601,000) and the youth population aged 13 to 17 years in Sydney and Melbourne (485,000).

The following sex and age weights were applied to the adult and youth samples

<b>Base: WEIGHTED ADULT SAMPLE ("000s)</b>	<b>Adult Sample N=1200 %</b>	<b>Weighted to 2002 18+ Population N=15601 %</b>
<b>Sex:</b>		
<b>Male</b>	<b>50</b>	<b>49</b>
<b>Female</b>	<b>50</b>	<b>51</b>
<b>Age:</b>		
<b>18 to 24 years</b>	<b>10</b>	<b>13</b>
<b>25 to 34 years</b>	<b>17</b>	<b>20</b>
<b>35 to 49 years</b>	<b>32</b>	<b>29</b>
<b>50+ years</b>	<b>41</b>	<b>38</b>

TABLE 1: Weighting Factors – Adult Sample



<b>Base: WEIGHTED YOUTH SAMPLE ("000s)</b>	<b>Youth Sample N=398 %</b>	<b>Weighted to 2002 Population 13 to 17 years N=485 %</b>
<b>Sex:</b>		
<b>Male</b>	<b>50</b>	<b>51</b>
<b>Female</b>	<b>50</b>	<b>49</b>
<b>Age:</b>		
<b>13 to 15 years</b>	<b>50</b>	<b>60</b>
<b>16 to 17 years</b>	<b>50</b>	<b>40</b>

TABLE 2: Weighting Factors – Youth Sample

Other details of the sample obtained appear in Section 4.



#### 4. Sample Profile – Who was interviewed?

##### 4.1 Adult Demographic Profile

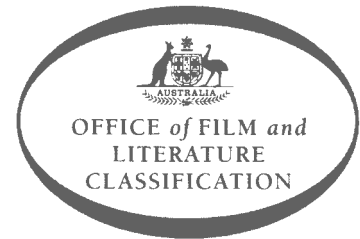
The weighted sample is representative of the Australian 18+ population (14,601,000).

<b>Base: WEIGHTED SAMPLE (14,601,000)</b>	<b>%</b>
<b>Sex:</b>	
Male	49
Female	51
<b>Age:</b>	
18 to 24 years	13
25 to 34 years	20
35 to 49 years	29
50+ years	38
<b>Parental status<sup>1</sup>:</b>	
Parent	34
Non Parent	66
<b>Occupation<sup>2</sup>:</b>	
White collar	53
Blue collar	47
<b>Annual Household Income:</b>	
Less than \$30,000	29
\$30,000 to \$59,000	29
\$60,000+	27
Refused/DK	15
<b>Residential area:</b>	
5 capital cities	62
Rest of Australia	38
NSW	36
Victoria	25
Queensland	19
SA	8
WA	10
Tasmania	2
<b>Cinema Behaviour:</b>	
Go	82
Don't go	18

TABLE 3: Demographic Profile of Adult Sample

<sup>1</sup> Parent: adults with child/children aged under 18 years at home; non parent – adults with no child aged under 18 years at home

<sup>2</sup> ABS Australian Standard Classification of Occupations



#### **4.2 Youth Demographic Profile**

The weighted sample is representative of the 13 to 17 year old population in Sydney and Melbourne (485,000).

<b>Base: WEIGHTED SAMPLE (485,000)</b>	<b>%</b>
<b>Sex:</b>	
<b>Male</b>	<b>49</b>
<b>Female</b>	<b>51</b>
<b>Age:</b>	
<b>13 to 15 years</b>	<b>60</b>
<b>16 to 17 years</b>	<b>40</b>
<b>Residential area:</b>	
<b>Sydney</b>	<b>55</b>
<b>Melbourne</b>	<b>45</b>
<b>Cinema Behaviour:</b>	
<b>Go</b>	<b>100</b>
<b>Don't go</b>	<b>-</b>
<b>Play Computer Games:</b>	
<b>Yes</b>	<b>69</b>
<b>No</b>	<b>31</b>

TABLE 4: Demographic Profile of Youth Sample

### 4.3 Profile of Computer Games Players

Computer games players are considerably more likely to be males, 64% compared to 35% for females with players tending to concentrate in the younger 13 to 15 year age group.

<b>Base: WEIGHTED SAMPLE ("000s)</b>	<b>Total Youth Population N=485 %</b>	<b>Computer Games Players N=335 %</b>
<b>Sex:</b>		
Male	51	64
Female	49	36
<b>Age:</b>		
13 to 15 years	60	65
16 to 17 years	40	35
<b>City:</b>		
Sydney	55	55
Melbourne	45	45

TABLE 5: Profile of Computer Games Players



## 5. MAIN FINDINGS

### 5.1.1 Sources of Influence for Adult Film Selection

Respondents were asked to select from a range of options the factors they take into account when deciding upon a film for personal viewing and in the case of parents, a film for their children. Respondents were also asked to select the most influential source.

Word of mouth is a key influence amongst adults with close to 7 in 10 (67%) including this in their range of influential sources and around one quarter (25%) citing it as the most influential source. Convenience also plays a general role in adult film selection but is somewhat less important at the most influential level (10%).

Of the different advertising media covered, TV trailers exert the strongest influence on adult film selection, 55% compared to 48% for trailers at the cinema and 21% for billboards/posters. TV trailers are the second highest (16%) source of influence after word of mouth. Film reviews (47%) are also influential in selection with around half (46%) mentioning as one of the factors they take into account and 15% as the most influential source.

As a general source, around two in ten adults (22%) indicate they use the classification rating as part of their decision process while 2% claim it is the most important factor for film selection and viewing.

<b>Base: WEIGHTED SAMPLE ('000s)</b>	<b>Some Influence %</b>	<b>Most Influential %</b>
<b>Word of mouth</b>	<b>67</b>	<b>26</b>
<b>Convenient time/place</b>	<b>59</b>	<b>10</b>
<b>Trailers/advertising on TV</b>	<b>55</b>	<b>16</b>
<b>Trailers at the cinema</b>	<b>48</b>	<b>9</b>
<b>Film reviews</b>	<b>47</b>	<b>15</b>
<b>Classification rating</b>	<b>22</b>	<b>2</b>
<b>Billboards/posters</b>	<b>21</b>	<b>1</b>
<b>Don't go to the cinema</b>	<b>18</b>	<b>18</b>
<b>None/DK</b>	<b>1</b>	<b>2</b>

TABLE 6: Sources of Influence for Adult Film Selection

### 5.1.2 Influential Sources – Differences by Age Groups

Respondents were asked to nominate all sources of influence when selecting a film at the cinema for personal viewing.

Word of mouth is consistently included as an influential source across all age groups. There is however differences in priorities for the different age groups on other sources of influence:

- TV trailers (80%) and those at the cinema (74%) as well as billboard/poster advertising (41%) are much more influential amongst young adults. Findings from recent quantitative research has indicated that this group more than any of the other age groups are more frequent cinema goers – around 50% go at least once a month compared to an average of just over 20% for the same frequency for those aged 25 years. Convenience in terms of time and place (75%) is also a strong contributing factor for film selection.
- Film reviews are a more common means of film selection for both the 25 to 34 year age group (48%) and 35 to 49 year olds (59%). Trailers are also motivating for both of these age groups with trailers on TV (70% for 25 to 34 age group and 64% for 35 to 49 year olds) registering to a higher degree than cinema trailers (64% and 56% respectively).
- 35 to 49 year olds register the highest use of classification rating,
- The older age group indicates lower levels of influence for all sources. This group is also less likely to go the cinema than any other age groups.

<b>Base: WEIGHTED SAMPLE</b>	<b>Total N=14,601 %</b>	<b>18 to 24 years N=1894 %</b>	<b>25 to 34 years N=2847 %</b>	<b>35 to 49 years N=4276 %</b>	<b>50+ years N=5584 %</b>
<b>Word of mouth</b>	<b>67</b>	<b>78</b>	<b>79</b>	<b>75</b>	<b>52</b>
<b>Convenient time/place</b>	<b>59</b>	<b><u>75</u></b>	<b>67</b>	<b>67</b>	<b>42</b>
<b>Trailers/advertising on TV</b>	<b>55</b>	<b><u>80</u></b>	<b><u>70</u></b>	<b><u>64</u></b>	<b>31</b>
<b>Trailers at the cinema</b>	<b>48</b>	<b><u>74</u></b>	<b><u>56</u></b>	<b><u>56</u></b>	<b>29</b>
<b>Film reviews</b>	<b>47</b>	<b>41</b>	<b><u>48</u></b>	<b><u>59</u></b>	<b>39</b>
<b>Classification rating</b>	<b>22</b>	<b>21</b>	<b>16</b>	<b><u>29</u></b>	<b>19</b>
<b>Billboards/posters</b>	<b>21</b>	<b><u>41</u></b>	<b>21</b>	<b>22</b>	<b>13</b>
<b>Don't go to the cinema</b>	<b>18</b>	<b>*</b>	<b>8</b>	<b>9</b>	<b>35</b>
<b>* less than 1%</b>					

TABLE 7: Influential Sources – Differences by Age

### 5.1.3 Most Influential Sources – Differences by Age

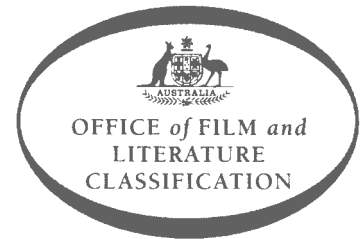
After nominating all sources of influence, respondents were asked to nominate the most influential source of influence. Only one response per respondent was allowed.

Word of mouth remains the most important influence across all age groups however key references emerge on other sources:

- The younger age group of 18 to 24 years are less likely to take film reviews into account (9% compared to 15% overall) and tend to rely on trailers at the cinema to decide on films to see (21% compared to 9% overall).
- Convenience tends to play a slightly more important role (16%) for adults aged 25 to 34 years and this is likely attributable to lifestyles.
- The influence of the classification rating is slightly higher than average amongst 35 to 49 year olds (4%) most likely associated with heightened awareness due to presence of children in household.
- TV trailers appear to have less influence on the older 50+ age groups (8% compared to 15% overall).

<b>Base: WEIGHTED SAMPLE</b>	<b>Total N=14,601 %</b>	<b>18 to 24 years N=1894 %</b>	<b>25 to 34 years N=2847 %</b>	<b>35 to 49 years N=4276 %</b>	<b>50+ years N=5584 %</b>
<b>Word of mouth</b>	26	30	26	28	24
<b>Trailers/advertising on TV</b>	16	22	21	21	8
<b>Film reviews</b>	15	9	15	18	15
<b>Convenient time/place</b>	10	13	16	10	7
<b>Trailers at the cinema</b>	9	21	10	7	4
<b>Classification rating</b>	2	1	1	4	3
<b>Billboards/posters</b>	1	3	1	2	*

TABLE 8: Most Influential Sources – Differences by Age



### 5.2.1 Sources of Influence for Children’s Film Selection Amongst Parents

Parents were also asked to select sources of influence and the most influential factor when choosing a film for their children. Not surprisingly child request is the key factor with close to 7 in 10 (69%) nominating it as influential and around one third (31%) indicating it is the single most influential factor.

Classification rating plays a strong role in influencing choice of film for children, both at the general and most influential level, 61% and 18% respectively. The classification rating is the second most important film selection factor for parents after child request.

Parents also rely strongly on word of mouth (60%), TV trailers and advertising (54%) and to a lesser extent trailers at the cinema (38%) and film reviews (32%).

<b>Base: WEIGHTED SAMPLE – HOUSEHOLDS WITH CHILDREN (4,919,000)</b>	<b>Some Influence %</b>	<b>Most Influential %</b>
<b>Children asked to see film</b>	<b>69</b>	<b>31</b>
<b>Classification rating</b>	<b>61</b>	<b>18</b>
<b>Word of mouth</b>	<b>60</b>	<b>13</b>
<b>Trailers/advertising on TV</b>	<b>54</b>	<b>10</b>
<b>Trailers at the cinema</b>	<b>38</b>	<b>4</b>
<b>Film reviews</b>	<b>32</b>	<b>3</b>
<b>Billboards/posters</b>	<b>18</b>	<b>-</b>
<b>Don’t go to the cinema with children</b>	<b>19</b>	<b>19</b>
<b>None/DK</b>	<b>1</b>	<b>2</b>

TABLE 9: Sources of Influence for Children’s Film Selection amongst Parents



### **5.2.2 Sources of Influence – Differences by Age of Children**

There are some variations in the prominence of factors selected by parents depending on the age of the child. Child's request remains the most frequently mentioned selection factor across all age groups with highest registration amongst parents with children aged 5 to 9 and 10 to 12 years. Across the board all factors are generally lower amongst parents with children under 5 years.

The majority of parents (61%) indicate the classification rating forms part of their film selection decision for their children. The highest level of mention occurs with parents of children aged 10 to 12 years (75% compared to 61% overall). This suggests it may be more difficult for parents to choose films that are suitable for 10 to 12 years based on marketing communications and use the classification rating to assist vetting and selection. Inclusion of classification rating as an influential factor decreases markedly as children move into teen years.

<b>Base: WEIGHTED SAMPLE – HOUSEHOLDS WITH CHILDREN IN EACH AGE GROUP ('000s)</b>	<b>Total Parents N=4919 %</b>	<b>Under 5 years N=1767 %</b>	<b>5 to 9 years N=2087 %</b>	<b>10 to 12 years N=1600 %</b>	<b>13 to 15 years N=1481 %</b>	<b>16 to 17 years N=963 %</b>
<b>Children ask to see film</b>	<b>69</b>	<b>55</b>	<b>80</b>	<b>82</b>	<b>74</b>	<b>75</b>
<b>Classification rating</b>	<b>61</b>	<b>49</b>	<b>69</b>	<b>75</b>	<b>66</b>	<b>58</b>
<b>Word of mouth</b>	<b>60</b>	<b>46</b>	<b>64</b>	<b>70</b>	<b>64</b>	<b>64</b>
<b>Trailers/advertising on TV</b>	<b>54</b>	<b>38</b>	<b>61</b>	<b>58</b>	<b>63</b>	<b>59</b>
<b>Trailers at cinema</b>	<b>38</b>	<b>26</b>	<b>41</b>	<b>42</b>	<b>47</b>	<b>40</b>
<b>Film reviews</b>	<b>32</b>	<b>28</b>	<b>33</b>	<b>39</b>	<b>29</b>	<b>39</b>
<b>Billboards/posters</b>	<b>18</b>	<b>16</b>	<b>18</b>	<b>17</b>	<b>20</b>	<b>24</b>
<b>Don't go to the cinema with children</b>	<b>19</b>	<b>31</b>	<b>9</b>	<b>8</b>	<b>15</b>	<b>18</b>

TABLE 10: Sources of Influence – Differences by Age of Children

### 5.2.3 Most Influential Sources of Influence – Differences by Age of Children

Child request remains at the top of the list with three in ten (31%) parents mentioning as the most influential factor. It is given higher priority by parents with children aged 5 to 9 (39%) and 10 to 12 years (41%).

Classification rating is the second most important selection factor fairly consistently across all age groups. Mention is slightly lower though not statistically significant amongst parents with 13 to 15 year olds.

Both word of mouth (13%) and TV trailers (10%) tend to play secondary influential roles.

<b>Base: WEIGHTED SAMPLE – HOUSEHOLDS WITH CHILDREN IN EACH AGE GROUP ('000s)</b>	<b>Total Parents N=4919 %</b>	<b>Under 5 years N=1767 %</b>	<b>5 to 9 years N=2087 %</b>	<b>10 to 12 years N=1600 %</b>	<b>13 to 15 years N=1481 %</b>	<b>16 to 17 years N=963 %</b>
<b>Children ask to see film</b>	<b>31</b>	<b>29</b>	<b>39</b>	<b>41</b>	<b>36</b>	<b>27</b>
<b>Classification rating</b>	<b>18</b>	<b>18</b>	<b>21</b>	<b>18</b>	<b>14</b>	<b>17</b>
<b>Word of mouth</b>	<b>13</b>	<b>9</b>	<b>13</b>	<b>10</b>	<b>15</b>	<b>17</b>
<b>Trailers/advertising on TV</b>	<b>10</b>	<b>6</b>	<b>12</b>	<b>14</b>	<b>8</b>	<b>11</b>
<b>Trailers at cinema</b>	<b>4</b>	<b>4</b>	<b>3</b>	<b>5</b>	<b>7</b>	<b>4</b>
<b>Film reviews</b>	<b>3</b>	<b>2</b>	<b>3</b>	<b>2</b>	<b>2</b>	<b>6</b>
<b>Don't go to the cinema with children</b>	<b>19</b>	<b>31</b>	<b>9</b>	<b>8</b>	<b>15</b>	<b>18</b>

TABLE 11: Most Influential Source – Differences by Age of Children

#### **5.2.4 Comparison of Influential Factors Amongst Parents – Self vs Children**

Clearly parents place different emphasis on the various decision factors for films for themselves and for their children. Compared to adults in general, parents register higher levels for most factors for personal viewing. Whilst classification rating is ranked in the same position, it holds a stronger influence in film choice - 31% for parents compared to 22% for adults. Inclusion of classification rating as an influential factor by parents almost doubles (61%) when choosing a film for their child/children, while scores for all other factors decrease. This result indicates very strong adoption for the classification system by Australian parents.

<b>Base: WEIGHTED SAMPLE – HOUSEHOLDS WITH CHILDREN ("000s)</b>	<b>All Adults %</b>	<b>Parents Film for self %</b>	<b>Parents Film for children %</b>
<b>Word of mouth</b>	<b>67</b>	<b>78</b>	<b>60</b>
<b>Convenient time/place</b>	<b>59</b>	<b>72</b>	<b>NA</b>
<b>Trailers/advertising on TV</b>	<b>55</b>	<b>69</b>	<b>54</b>
<b>Trailers at the cinema</b>	<b>48</b>	<b>55</b>	<b>38</b>
<b>Film reviews</b>	<b>47</b>	<b>52</b>	<b>32</b>
<b>Classification rating</b>	<b>22</b>	<b><u>31</u></b>	<b><u>61</u></b>
<b>Billboards/posters</b>	<b>21</b>	<b>22</b>	<b>18</b>
<b>Don't go to the cinema/don't go with children</b>	<b>18</b>	<b>9</b>	<b>19</b>
<b>Children ask to see film</b>	<b>NA</b>	<b>NA</b>	<b>69</b>

TABLE 12: Comparison of Influential Factors Amongst Parents – Self vs Children

### 5.3.1 Sources of Influence for Youth Film Selection

TV trailers are significantly more impactful amongst the youth audience. Close to 9 in 10 (88%) nominate as an influential source with over 4 in 10 (42%) indicating TV trailers are the strongest trigger to influence film selection or request to see.

Word of mouth (80%), trailers at the cinema (76%) and convenience factor (74%) are also influential.

One-third (33%) include classification rating as an influential source with only 2% indicating it is the most influential factor in their choice or request.

<b>Base: WEIGHTED SAMPLE ("000s)</b>	<b>Some Influence %</b>	<b>Most Influential %</b>
<b>Trailers/advertising on TV</b>	<b>88</b>	<b>42</b>
<b>Friends/relatives</b>	<b>80</b>	<b>23</b>
<b>Trailers at the cinema</b>	<b>76</b>	<b>17</b>
<b>Convenient time/place</b>	<b>73</b>	<b>9</b>
<b>Billboards/posters</b>	<b>52</b>	<b>2</b>
<b>Film reviews</b>	<b>42</b>	<b>4</b>
<b>Classification rating</b>	<b>33</b>	<b>2</b>

TABLE 13: Sources of Influence for Youth Film Selection

### 5.3.2 Sources of Influence – Differences by Demographic Groups

There are no major differences across the demographic groups on sources of influence with the exception of classification rating. The 16 to 17 year old age group is less likely to nominate as an influential source, 24% compared to 38% for younger respondents.

Base: WEIGHTED SAMPLE ("000s)	Total N=485 %	Male N=248 %	Female N=237 %	13 to 15 N=289 %	16 to 17 N=196 %
Trailers/advertising on TV	88	87	87	87	86
Friends/relatives	80	78	81	82	77
Trailers at the cinema	76	73	80	77	75
Convenient time/place	73	70	77	75	71
Billboards/posters	52	52	51	56	46
Film reviews	42	41	44	45	38
Classification rating	33	36	30	38	<u>24</u>

TABLE 14: Sources of Influence - Differences by Demographic Groups

### 5.3.3 Most Influential Source – Differences by Demographic Groups

There is very little difference amongst demographic groups on most influential source.

Trailers/advertising on TV is top of the list for males (42%), females (42%) and both the 13 to 15 year old age group (44%) as well as the older 16 to 17s (40%).

Base: WEIGHTED SAMPLE ("000s)	Total N=485 %	Male N=248 %	Female N=237 %	13 to 15 N=289 %	16 to 17 N=196 %
Trailers/advertising on TV	42	43	42	44	40
Friends/relatives	23	24	21	22	24
Trailers at the cinema	17	18	15	16	18
Convenient time/place	9	7	12	9	10
Billboards/posters	2	1	2	*	4
Film reviews	4	4	3	4	4
Classification rating	2	2	3	3	1

TABLE 15: Most Influential Source – Differences by Demographic Groups

#### 5.4.1 Comparison of Influential Sources by Key Segments

The analysis below compares influential sources amongst adults, parents when selecting films for their child or children and the youth segment.

Word of mouth is the strongest source of influence for adults (67%) and also features highly with the youth sample (80%). Trailers or advertising on TV (88%) however exert the strongest influence with younger audiences. Both word of mouth (60%) and classification rating (61%) are almost equally influential for parents when selecting films for their children. However the aspect which dominates parents' choice is driven by the child's request to see a particular film (69%).

Convenience in terms of time and place is a stronger factor for the youth segment (73%) compared to adults (59%). This aspect does not come into play for parents. It is assumed that going to the cinema is a planned occasion.

Trailers at the cinema (76%) are considerably more influential amongst the youth segment as are billboards/posters (52%). All marketing communications register much more strongly with the younger audience.

The classification rating is more likely to be included in adult selection criteria (44%) than in youth consideration set (33%).

<b>Base: WEIGHTED SAMPLE (‘000s)</b>	<b>Adults N=14,601 %</b>	<b>Parents For Children N=1894 %</b>	<b>Youth N=2847 %</b>
<b>Word of mouth/friends/relatives</b>	<b><u>67</u></b>	<b>60</b>	<b>80</b>
<b>Convenient time/place</b>	<b>59</b>	<b>NA</b>	<b><u>73</u></b>
<b>Trailers/advertising on TV</b>	<b>55</b>	<b>54</b>	<b><u>88</u></b>
<b>Trailers at the cinema</b>	<b>48</b>	<b>38</b>	<b><u>76</u></b>
<b>Film reviews</b>	<b>47</b>	<b>32</b>	<b>42</b>
<b>Classification rating</b>	<b>44</b>	<b><u>61</u></b>	<b>33</b>
<b>Billboards/posters</b>	<b>21</b>	<b>18</b>	<b><u>52</u></b>
<b>Children ask to see film</b>	<b>NA</b>	<b>69</b>	<b>NA</b>
<b>AVERAGE NO. OF SOURCES</b>	<b>3.2</b>	<b>3.3</b>	<b><u>4.4</u></b>

TALBE 16: Comparison of Influential Sources by Key Segments

#### 5.4.2 Comparison of Most Influential Source by Key Segments

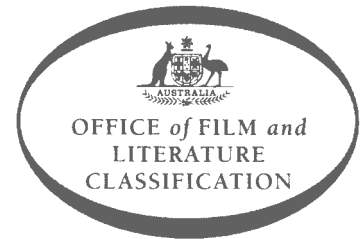
Responses have been grouped under three headings to better understand the different types of influences amongst each group. External sources such as trailers on TV and cinema, billboards/posters and session time and place have been grouped under Marketing Influences. Word of mouth and child requests are grouped together under Informal Influences while film review and classification rating appear together as Independent Influences.

At the most influential level, very different patterns are apparent across the three segments:

- Overall marketing influences have the strongest impact on the youth segment (72%). These influences are also strongly motivating for adults (36%) but less influential amongst parents (14%).
- Informal sources (44%) are much stronger for parents driven by child request (31%).
- Independent sources are almost as equally as important for adults (17%) and parents (21%) but for different reasons. Film reviews (15%) are more influential for adults while the classification rating is a strong influence for parents (18%)

<b>Base: WEIGHTED SAMPLE (‘000s)</b>	<b>Adults N=14,601 %</b>	<b>Parents For Children N=1894 %</b>	<b>Youth N=2847 %</b>
<b><u>Marketing Influences</u></b>	<b><u>36</u></b>	<b><u>14</u></b>	<b><u>72</u></b>
Trailers/advertising on TV	16	10	42
Trailers at the cinema	9	4	17
Billboards/posters	1	-	4
Convenient time/place	10	*	9
<b><u>Informal Influences</u></b>	<b><u>25</u></b>	<b><u>44</u></b>	<b><u>23</u></b>
Word of mouth/friends/relatives	26	13	23
Children ask to see the film	NA	31	NA
<b><u>Independent Influences</u></b>	<b><u>17</u></b>	<b><u>21</u></b>	<b><u>6</u></b>
Film reviews	15	3	4
Classification rating	2	18	2
<b>* less than 1%</b>			

TABLE 17: Comparison of Most Influential Source by Key Segments



### 5.4.3 Film Classification rating Influence amongst Adult and Youth Demographic Groups

The analysis below compares the proportion in each segment that nominates classification rating as an influential factor in choice of film. This shows that females (27%), 35 to 49 year olds (29%), parents (31%), young males (36%) and 13 to 15 year olds (39%) place more importance on classification rating when selecting a film than other demographic segments.

<b>Base: WEIGHTED SAMPLE</b>	<b>%</b>
<i>Adults</i>	
<b>Total</b>	<b>22</b>
<b>Male</b>	<b>16</b>
<b>Female</b>	<b><u>27</u></b>
<b>18 to 24 years</b>	<b>21</b>
<b>25 to 34 years</b>	<b>16</b>
<b>35 to 49 years</b>	<b><u>29</u></b>
<b>50+ years</b>	<b>19</b>
<b>Parents</b>	<b><u>31</u></b>
<b>Non parents</b>	<b>17</b>
<i>Youth:</i>	
<b>Total</b>	<b>33</b>
<b>Male</b>	<b><u>36</u></b>
<b>Female</b>	<b>30</b>
<b>13 to 15 years</b>	<b><u>39</u></b>
<b>16 to 17 years</b>	<b>24</b>

TABLE 18: Film Classification Rating Influence amongst Adult and Youth Demographic Groups



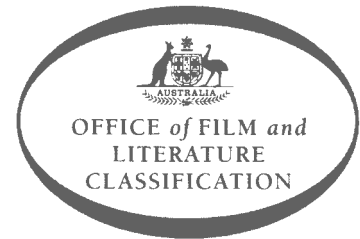
### **5.5.1 Sources of Influence for Computer Game Selection Amongst Computer Games Players**

Computer games' players were also asked to indicate the factors they take into account when buying or hiring a computer game. Word of mouth by friends or relatives plays is a key element in game selection (75%). TV advertising also plays a strongly motivating role (62%) but not nearly to the same extent as it does for film choice or request (88%).

Compared to classification rating as a film selection influence (33%), only around one quarter (24%) of game players nominate it as part of their selection process. This may be due to less supervision by parents on game choice or easier access by child either through borrowing from friends or at point of purchase or hire.

<b>Base: WEIGHTED SAMPLE – COMPUTER GAMES PLAYERS ("000s)</b>	<b>N=335 %</b>
<b>Friends/relatives</b>	<b>75</b>
<b>TV advertising</b>	<b>62</b>
<b>Magazine advertising</b>	<b>56</b>
<b>Game reviews</b>	<b>50</b>
<b>Classification rating</b>	<b>24</b>

TABLE 19: Sources of Influence for Computer Game Selection

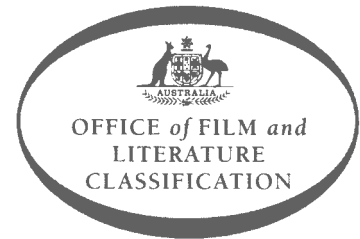


### **5.5.2 Computer Games Classification Rating Influence amongst Youth Demographic Groups**

There are no variations by demographic segments on including classification rating as a selection criterion.

<b>Base: WEIGHTED SAMPLE</b>	<b>%</b>
<b>Total</b>	<b>24</b>
<b>Male</b>	<b>22</b>
<b>Female</b>	<b>25</b>
<b>13 to 15 years</b>	<b>23</b>
<b>16 to 17 years</b>	<b>25</b>

TABLE 20: Computer Games Classification Rating Influence Analyzed by Youth Demographic Groups



### **5.6.1 Attitudes towards the OFLC and Classification – Adult Agree vs Disagree Ratings**

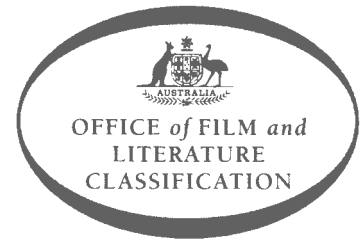
Amongst the Australian population there is almost universal recognition (94%) of the benefits of classification advice. The majority (85%) also believe the OFLC fulfils an important community role and have confidence (72%) in its rating decision making abilities.

There is also strong consensus (71%) that classification symbols are a means of deciding on the suitability of a film or computer game for different audiences. There is a small proportion (19%) that is in disagreement on this issue and this attitude tends to be more prevalent amongst males (26%), non parents (27%), white collar (26%) and high income (35%) households (refer to Table 22 overleaf).

Whilst the majority (62%) of the Australian population feels that there are appropriate systems in place to limit children’s access to unsuitable films or computer games, there is a sizeable proportion (29%) that are in disagreement. No specific demographic segments appear to hold this attitude to a stronger extent.

<b>Base: WEIGHTED SAMPLE ("000s)</b>	<b>Strongly/Partly Agree %</b>	<b>Strongly/Partly Disagree %</b>
<b>It’s useful to have classification symbols for movies and computer games</b>	<b>94</b>	<b>3</b>
<b>OFLC plays an important role in providing classification advice on movies and computer games</b>	<b>85</b>	<b>9</b>
<b>OFLC has a good perspective on what kinds of movies/computer games are suitable for people of different ages</b>	<b>72</b>	<b>19</b>
<b>Classification symbols are one of the ways to decide on the suitability of movies and computer games for yourself</b>	<b>71</b>	<b>22</b>
<b>There are appropriate systems in place to limit children’s access to unsuitable movies and computer games</b>	<b>62</b>	<b>29</b>

TABLE 21: Attitudes to the OFLC and Classification – Adult Agree vs Disagree Ratings

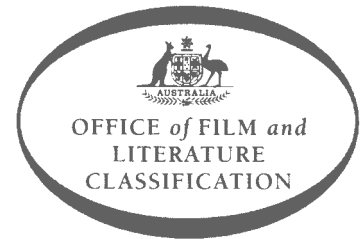


**Disagreement Segment Analysis**

*“Classification symbols are one of the ways to decide on the suitability of movies and computer games for yourself”*

<b>Base: WEIGHTED SAMPLE  (“000s)</b>	<b>Strongly/Partly Disagree %</b>
<b>Total</b>	<b>22</b>
<b>Male</b>	<b>26</b>
<b>Female</b>	<b>18</b>
<b>Parents</b>	<b>11</b>
<b>Non Parents</b>	<b>27</b>
<b>White collar</b>	<b>26</b>
<b>Blue collar</b>	<b>17</b>
<b>Low income households</b>	<b>17</b>
<b>Medium income households</b>	<b>20</b>
<b>High income households</b>	<b>28</b>

TABLE 22: Disagreement Analysis



### **5.6.2 Attitudes towards the OFLC and Classification – Youth Agree vs Disagree Ratings**

The youth segment is largely very positive towards the usefulness of classification symbols (93%), the OFLC’s role in providing (85%) and deciding (80%) on appropriate film/game classifications. They also strongly believe that there are systems in place to limit access to unsuitable content for children.

Close to 6 out of 10 (58%) also agree that the classification symbols are one of the way to decide on movie or game suitability. This is a particularly positive result and indicates that while the youth segment do not claim to use the classification system they believe it is beneficial.

<b>Base: WEIGHTED SAMPLE ("000s)</b>	<b>Agree %</b>	<b>Disagree %</b>
<b>It’s useful to have classification symbols for movies and computer games</b>	<b>93</b>	<b>6</b>
<b>OFLC plays an important role in providing classification advice on movies and computer games</b>	<b>85</b>	<b>11</b>
<b>There are appropriate systems in place to limit children’s access to unsuitable movies and computer games</b>	<b>82</b>	<b>17</b>
<b>OFLC has a good perspective on what kinds of movies/computer games are suitable for people of different ages</b>	<b>80</b>	<b>18</b>
<b>Classification symbols are one of the ways to decide on the suitability of movies and computer games for yourself</b>	<b>58</b>	<b><u>40</u></b>

TABLE 23: Attitudes towards the OFLC and Classification – Youth Agree vs Disagree Ratings

### 5.6.3 Attitudes towards the OFLC and Classification – Agree Ratings Youth vs Adults

Of the three groups, parents tend to express more positive attitudes towards the various issues, in particular the usage of classification symbols to decide on the suitability of movies or games. The youth segments registers the lowest agreement on this issue but highest on appropriateness of child access limitation systems to film and games. This positive attitude may well be a function of a desire for no additional measures to be implemented.

<b>Base: WEIGHTED SAMPLE ("000s)</b>	<b>Adults N=16,401 %</b>	<b>Parents N=1,894 %</b>	<b>Youth N=485 %</b>
<b>It's useful to have classification symbols for movies and computer games</b>	<b>94</b>	<b>98</b>	<b>93</b>
<b>OFLC plays an important role in providing classification advice on movies and computer games</b>	<b>85</b>	<b>90</b>	<b>85</b>
<b>OFLC has a good perspective on what kinds of movies/computer games are suitable for people of different ages</b>	<b>72</b>	<b>77</b>	<b>80</b>
<b>Classification symbols are one of the ways to decide on the suitability of movies and computer games for yourself</b>	<b>71</b>	<b><u>88</u></b>	<b><u>58</u></b>
<b>There are appropriate systems in place to limit children's access to unsuitable movies and computer games</b>	<b>62</b>	<b>63</b>	<b><u>82</u></b>

TABLE 24: Attitudes to the OFLC and Classification – Agree Ratings Youth vs Adults

#### 5.6.4 Attitude Differences amongst Age Segments – Agree Ratings

The analysis below compares the attitudes of youth, all adults, 18 to 49 years and the over 50's group. The youth segment and those aged under 50 register high levels of support for the OFLC and its ability to make good classification decisions. In general the older group tend to be less favourable towards the OFLC and the classification issues examined. This response is most likely associated with less relevance rather than any negative perceptions or attitudes.

<b>Base: WEIGHTED SAMPLE (‘000s)</b>	<b>Youth N=485 %</b>	<b>All Adults N=16,401 %</b>	<b>18 to 49 years N=9008 %</b>	<b>50+ years N=5584 %</b>
<b>It’s useful to have classification symbols for movies and computer games</b>	<b>93</b>	<b>94</b>	<b>96</b>	<b>91</b>
<b>OFLC plays an important role in providing classification advice on movies and computer games</b>	<b>85</b>	<b>85</b>	<b>89</b>	<b>78</b>
<b>OFLC has a good perspective on what kinds of movies/computer games are suitable for people of different ages</b>	<b>80</b>	<b>72</b>	<b>75</b>	<b>68</b>
<b>Classification symbols are one of the ways to decide on the suitability of movies and computer games for yourself</b>	<b>58</b>	<b>71</b>	<b>74</b>	<b>66</b>
<b>There are appropriate systems in place to limit children’s access to unsuitable movies and computer games</b>	<b>82</b>	<b>62</b>	<b>64</b>	<b>59</b>

TABLE 25: Attitude Differences amongst Age Segments – Agree Ratings



## **6. Conclusions**

This research is convincing in establishing the Australian community's support for the OFLC and the benefits of having a classification rating system for film and computer games. It is particularly encouraging that these views are held not only by adults but also by the youth segment. Older Australians aged 50 years and over tend to express less favourable attitudes however this is considered to be due to lower relevance rather than any strong negative perceptions of the OFLC and classification. Not surprisingly parents are the strongest advocates of the classification rating as a film selection criterion.

There is obviously a great deal of influence exerted by advertising media in the form of TV trailers. This strong influence is notable across all segments but particularly so amongst the youth and young adult segments. These results clearly indicate the need for a system to ensure that all TV trailers are appropriately classified before being aired on TV to provide the Australia public with a more effective means of film choice for themselves and their families.