Creative Industries
Policy & Evidence Centre
Led by nesta

Digital Culture -
Consumer Tracking Study

WAVE 3 OF 6 | MAY 2020

Intellectual Property Office

AUDIENCE NET

Methodology and Sample

See Wave 1 report for the detailed overall methodology (link here).

Survey length: 5-7 minutes.

Respondents were asked to comment on the previous 7-day period.

While we have their historic behaviours tracked, each week respondents are asked afresh whether they have done any of the key actions/activities. This enables us to capture new consumers (e.g. those who did not stream music in Wave 1 but took it up in later waves).

All wave-on-wave comparisons, unless otherwise stated, are between week 2 and week 3.

Minimising recollection bias: For questions where respondents need to provide a time or frequency amount, their answers from the previous week are shown to them for reference.

Wave-on-wave differences that are significant at a 95% confidence interval are highlighted in the charts (with arrows – red for decrease, green for increase*). Sizeable differences that are not significant are also highlighted in the analysis as these often provide early indications of shifts.

For most questions, the sample bases for each of the five content categories focus on those who buy physical products, download or stream/access them online. They exclude those who only consume via other means.

Week	1	2	3	4	5	6
Fieldwork Dates	9th-19th April	20th-26th April	27th Apr-3rd May			
N=	3,863	2,792	2,369			

*Key:

- Indicates a significant increase on the previous week
- Indicates a significant decrease on the previous week

Overview

The **median amount of time spent per day accessing** music, film and video games (online or offline) was unchanged again (at 3 hours). While this week TV saw another slight decline in time (by 10 minutes), it continued to have the highest median time across consumer groups (3 hours and 20 minutes). There was no change for e-publishing categories with audiobooks and books remaining at 2 hours, and magazines remaining at 1 hour.

For music, film and TV there was a reduction in the proportions who had **downloaded** and/or **streamed** in the last week. The category showing the biggest decline for both (streaming and downloading) was music (down 9 percentage points). This would suggest that the previous wave's high music streaming figure could indeed have been driven by the Global Citizen concert. However, the week 3 figure was still 8 percentage points higher than week 1, suggesting that music streaming may be seeing a more sustained uplift. Music downloading, on the other hand, dropped to a level below that of week 1.

Music, film and TV saw **no change in the median number of hours spent streaming in the past week**.

While week 3 saw the number of physical products purchased slightly decline in most categories, the proportion was still higher than week 1. This would suggest that there may be a genuine increase in physical purchasing.

Looking at the total use of illegal methods (i.e. the combined figure of those who use a mix of legal/illegal methods plus those who use solely illegal methods) **for categories where downloading or streaming is measured separately – there were no significant changes week on week**. For both streaming and downloading, music and film remained static or declined slightly (by 1 or 2 percentage points). For TV, streaming remained consistent, while there was a slightly larger drop (of 4 percentage points) for downloading.

The proportion using illegal means to access video games increased by 4 percentage points to 12%.

Looking at the use of illegal methods for accessing e-publications, while digital magazines saw no change, for e-books, there was a 4 percentage point increase (to 18%). Audiobooks saw the highest overall increase amongst these categories (up 8 percentage points to 26%).

Whilst total weekly consumption for most **other/non-traditional content** categories remained relatively stable, there were some interesting decreases in the use of social media ("looking, commenting or liking" social media posts by "other users" or "celebrities"), watching "live media streams/ broadcasts" or "videos made by others" and playing online multiplayer video games. "Watching or reading news" continued to be the activity carried out the most – especially on a daily basis.

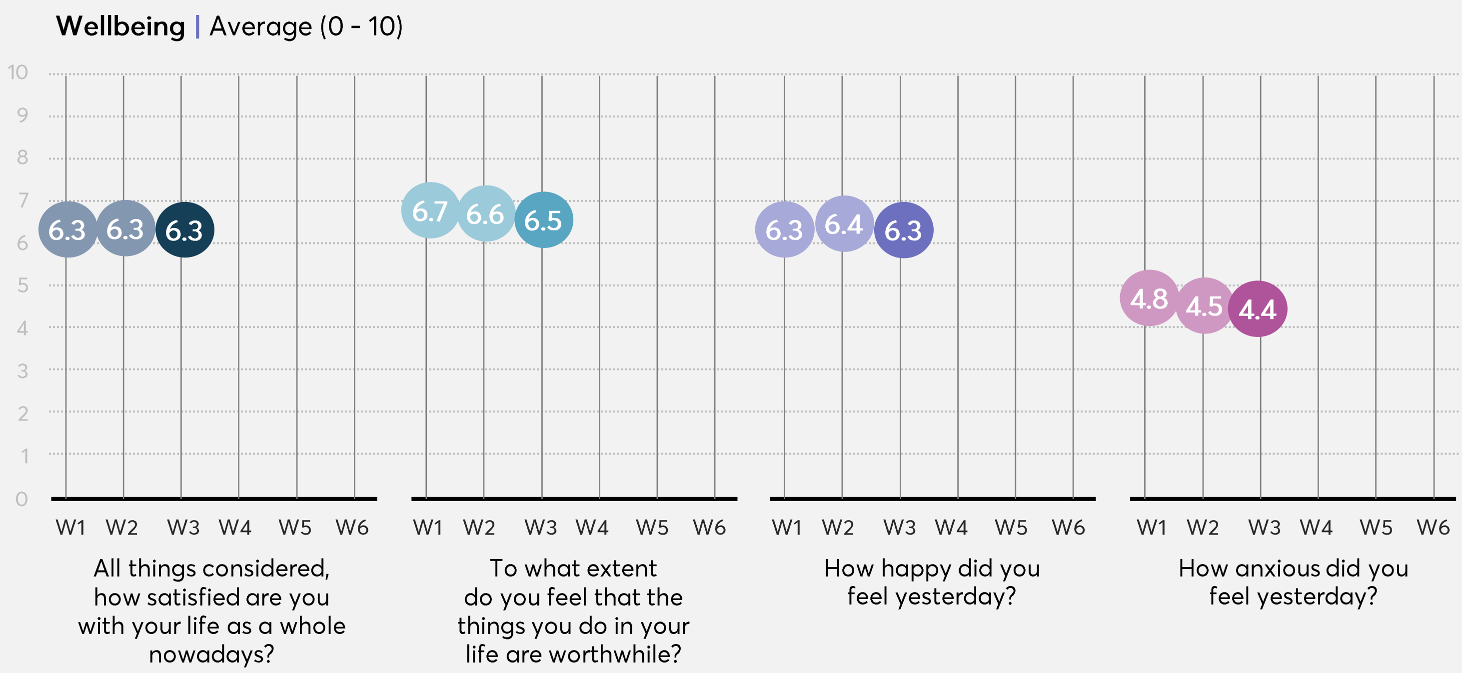
Wellbeing measures show no notable shifts between week 2 and 3. However, we could be seeing the beginning of a trend in the extent to which people report "that the things you do in life are worthwhile", and also a decline in levels of anxiety ("how anxious did you feel yesterday").

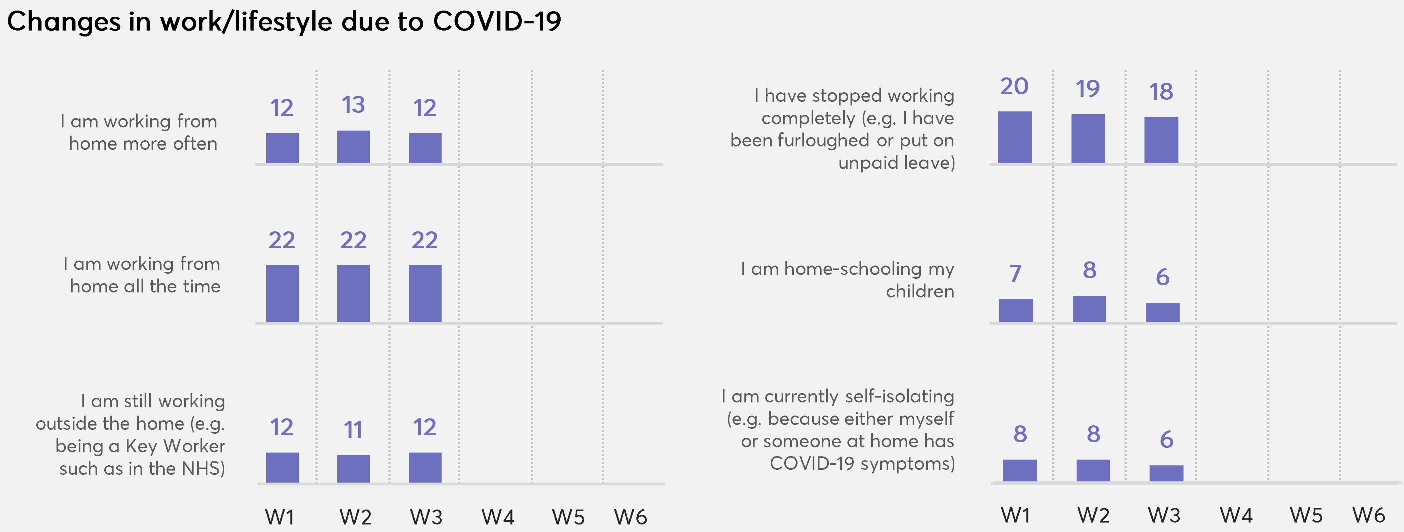
Changes to work/lifestyle due to COVID-19 were consistent with levels reported in week 2.

Wellbeing and Lifestyle

- Wellbeing measures showed no notable shifts between weeks 2 and 3. However, we could be seeing the beginning of a downward trend in the extent to which people report "that the things you do in life are worthwhile", and also a decline in levels of anxiety ("how anxious did you feel yesterday"). For both of these metrics, there were significant differences between week 1 and week 3 results.

- Changes to work/lifestyle due to COVID-19 were consistent with levels reported in week 2.





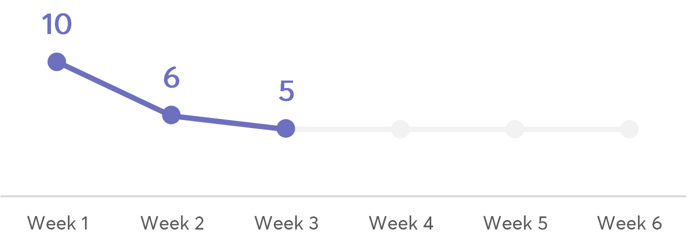
CATEGORY 01

Music

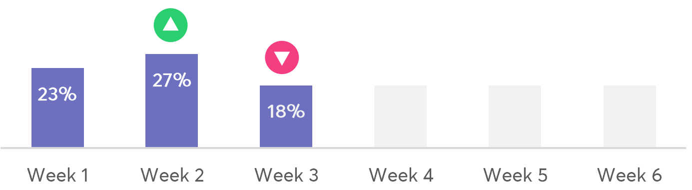
- Median hours spent listening to music remained unchanged since week 2, at 3 hours per day.
- The number of respondents downloading music decreased by 9 percentage points to 18%. The median number of downloads dropped from 6 to 5.
- There were no notable differences in the legal/illegal mix of downloading sources. The proportion using partly or wholly illegal downloading sources decreased by 1 percentage point to 27%. The number using solely illegal downloading sources increased, by 2 percentage points to 15%.
- There were no noteworthy changes in the share of downloading across sources. "Saving offline via a paid for subscription service" remained the most used method (57%).
- The proportion of respondents streaming music decreased by 9 points to 51%, suggesting that last wave's high figure could indeed have been driven by the Global Citizen concert. However the figure is still 8 percentage points higher than week 1, suggesting that there may be a more sustained uplift in streaming music.
- The median number of hours spent streaming per week remained static at 3.
- The overwhelming proportion using only legal streaming sources remained the same (99%).
- Looking at share of streaming across sources, a "paid for subscription service" remained dominant, with 45%. "Listening to radio online" saw a small, but significant 2 percentage point drop (to 5%).
- There was a 2 percentage point decrease in the proportion who had made a physical purchase (6%).

DOWNLOADING

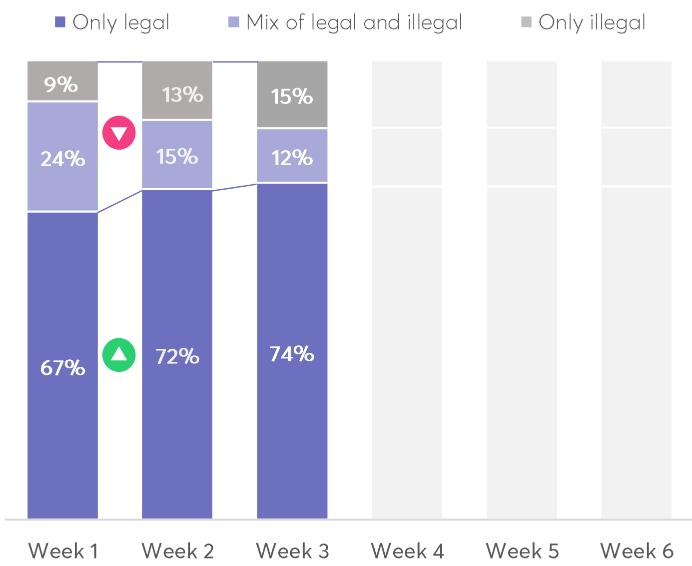
Median number of downloads in past week:



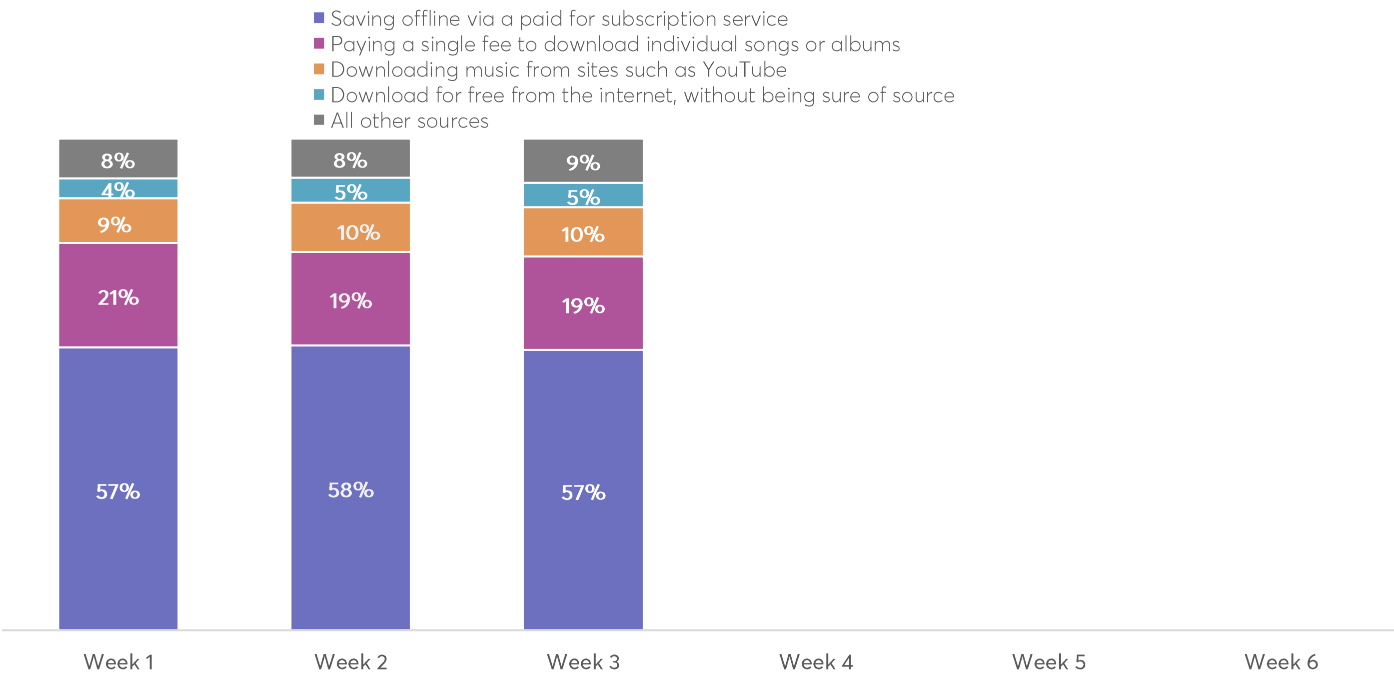
Downloading activity:



Downloading sources:



Share of downloading across sources:



Base: Wave 2 – 'Downloading activity' (Total sample, n=2,369), 'Median number of downloads in past week', 'Downloading sources' and 'Share of downloading across sources' (Weekly music downloaders, n=404-436)

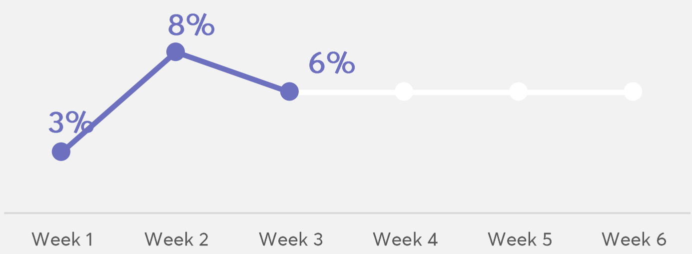
CATEGORY 01

Music

Median time spent listening to music each day*:

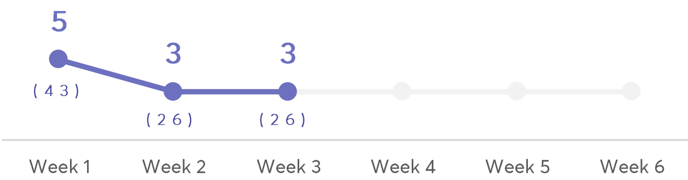
* Any format (online or offline)

Physical purchasing:

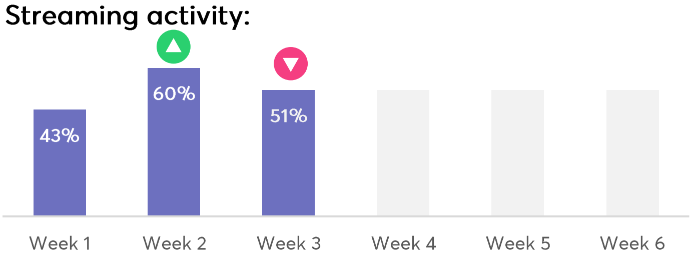


STREAMING

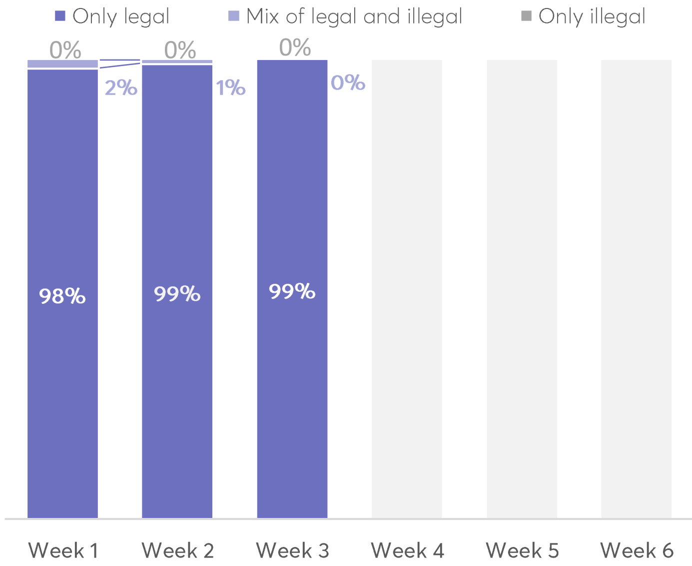
Median hours spent streaming in past week
(or minutes per day):



Streaming activity:

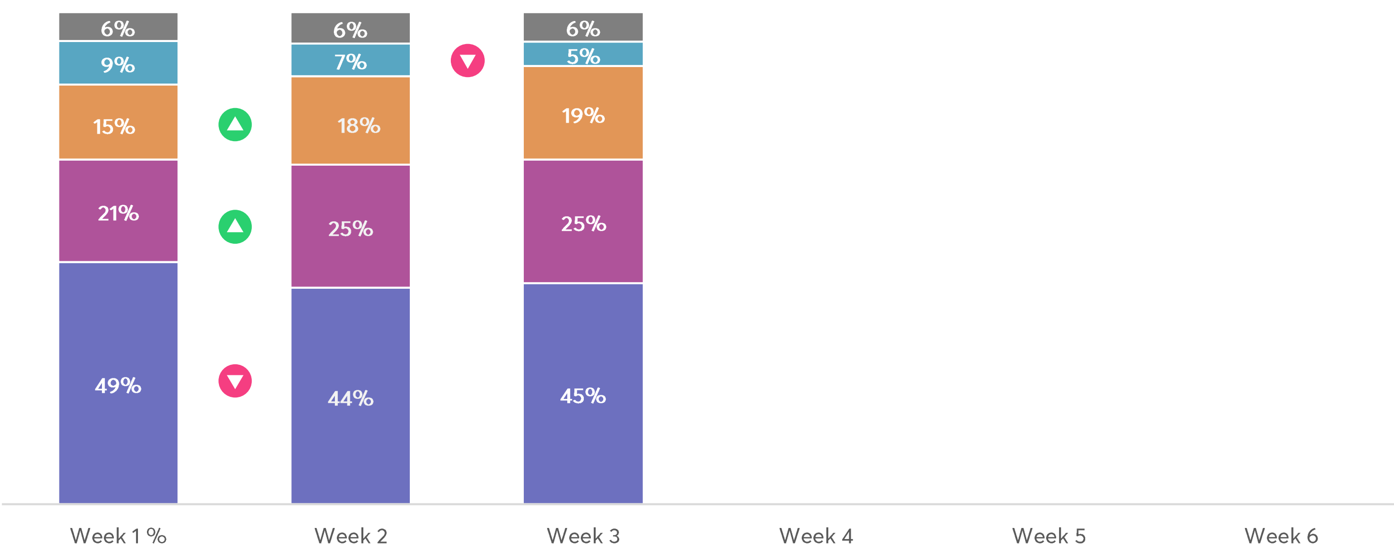


Streaming sources:



Share of streaming across sources:

- A paid for subscription service
- A free version/tier of a music streaming service
- All other sources
- A site such as YouTube or Dailymotion to watch/listen to music
- Listening to the radio online (via websites/apps) either live catchup



Base: Wave 3 – 'Streaming activity', 'Physical purchasing' (Total sample, n=2,369), 'Median time spent listening to music each day' (Downloaded, streamed, or purchased music in past week, n=1,265), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly music streamers, n=1,113-1,233)

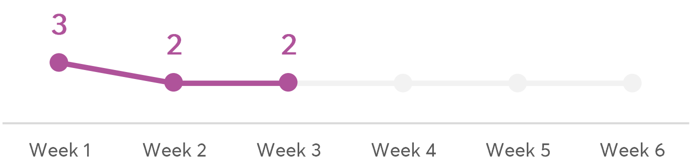
CATEGORY 02

Film

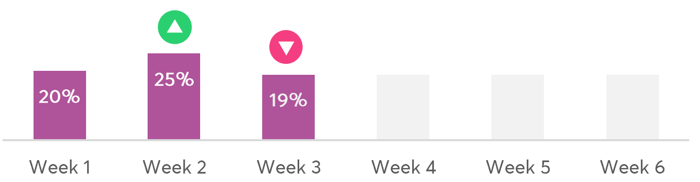
- Median hours spent watching films remained unchanged since week 2, at 3 hours per day.
- The number of respondents downloading films decreased by 6 percentage points to 19%, while the median number of downloads remained at 2.
- There were no notable changes in the legal/illegal mix of downloading sources overall. The proportion using only illegal sources increased by 1 percentage point to 8%, while the number using a mix of legal and illegal downloading sources decreased, by 2 percentage points to 7%.
- "Saving offline via a paid for subscription service" remains the dominant method to download film and increases share by 3 percentage points to 65%.
- The proportion streaming films decreased by 8 points to 56%.
- The median number of hours spent streaming per week was 4 – no change.
- The proportion using partly or wholly illegal streaming sources dropped from 10% to 8%. While the proportion of those using a mix of legal and illegal streaming dropped 2 percentage points to 5%, the number using solely illegal remained the same at 3%.
- Looking at share of streaming across sources, a "paid subscription service to an online video streaming service" remained the dominant method and increased its share by 4 percentage points to 80%. TV catch-up services saw a further 2 percentage point decline in share (to 7%).
- There was a 3 percentage point decrease in the proportion of those who made a physical purchase (to 10%).

DOWNLOADING

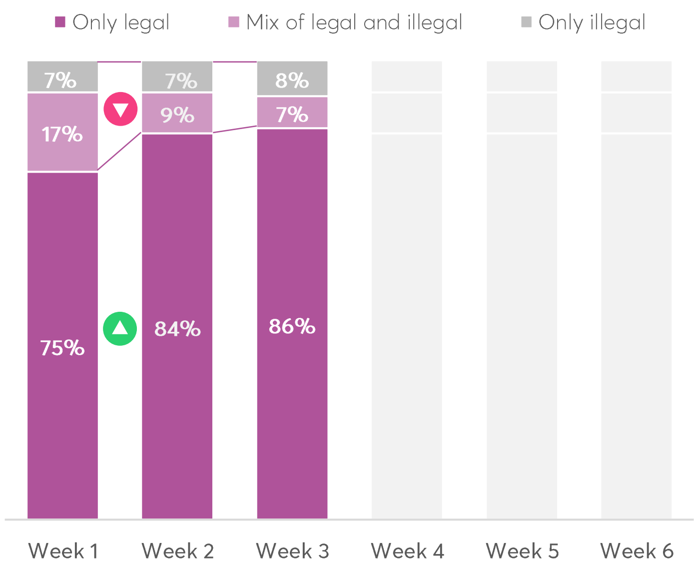
Median number of downloads in past week:



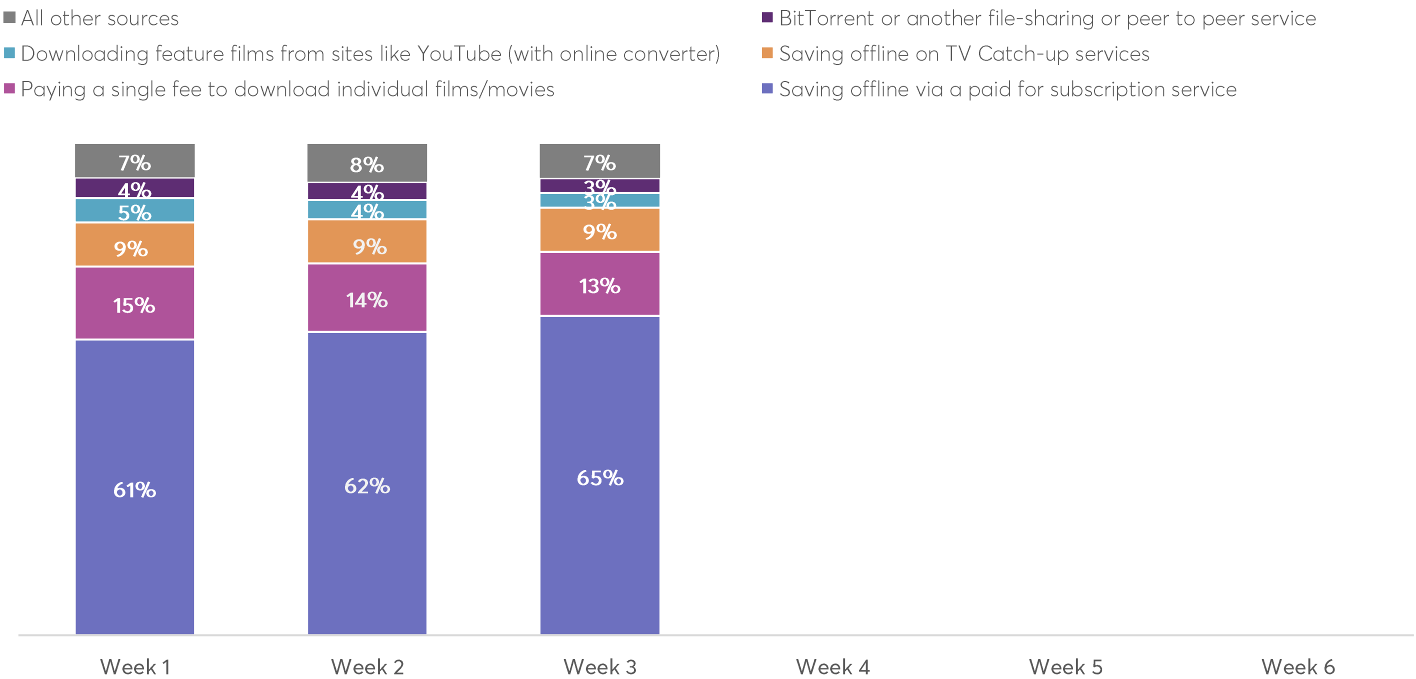
Downloading activity:



Downloading sources:



Share of downloading across sources:

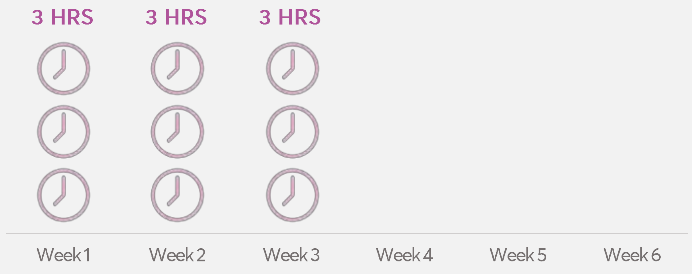


Base: Wave 3 – 'Downloading activity' (Total sample, n=2,369), 'Median number of downloads in past week', 'Downloading sources' and 'Share of downloading across sources' (Weekly film downloaders, n=464-476))

CATEGORY 02

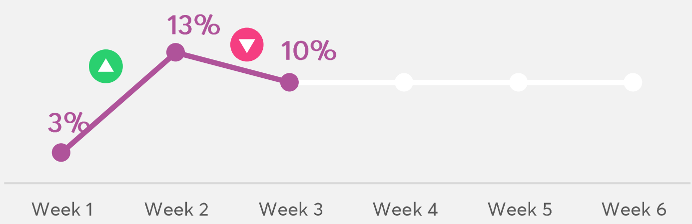
Film

Median time spent watching films each day*:



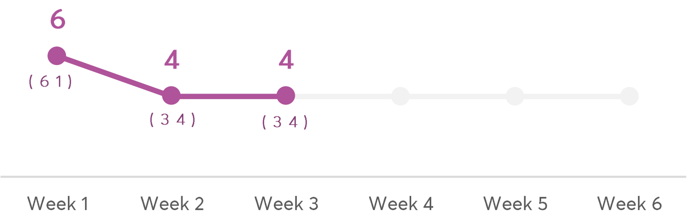
* Any format (online or offline)

Physical purchasing:

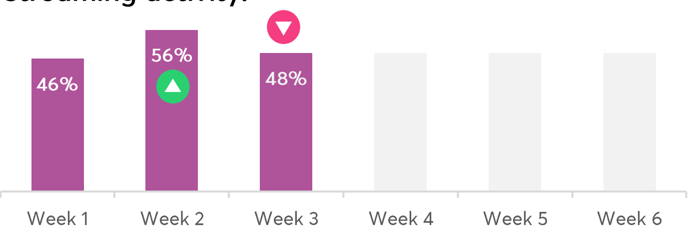


STREAMING

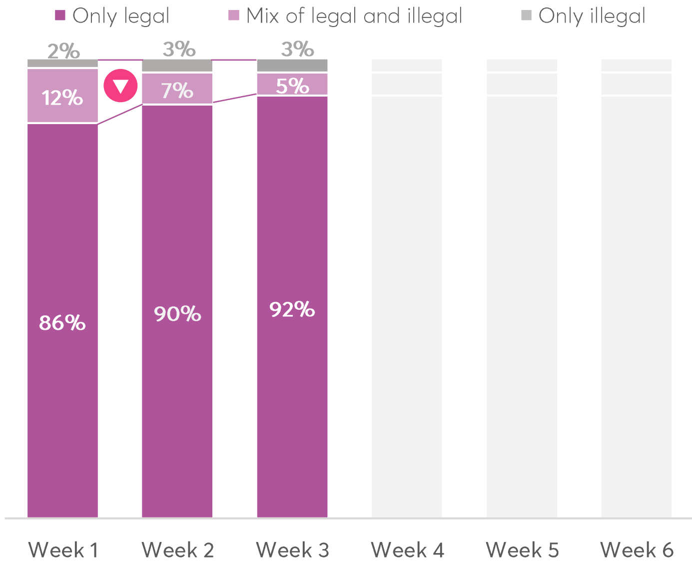
Median hours spent streaming in past week
(or minutes per day):



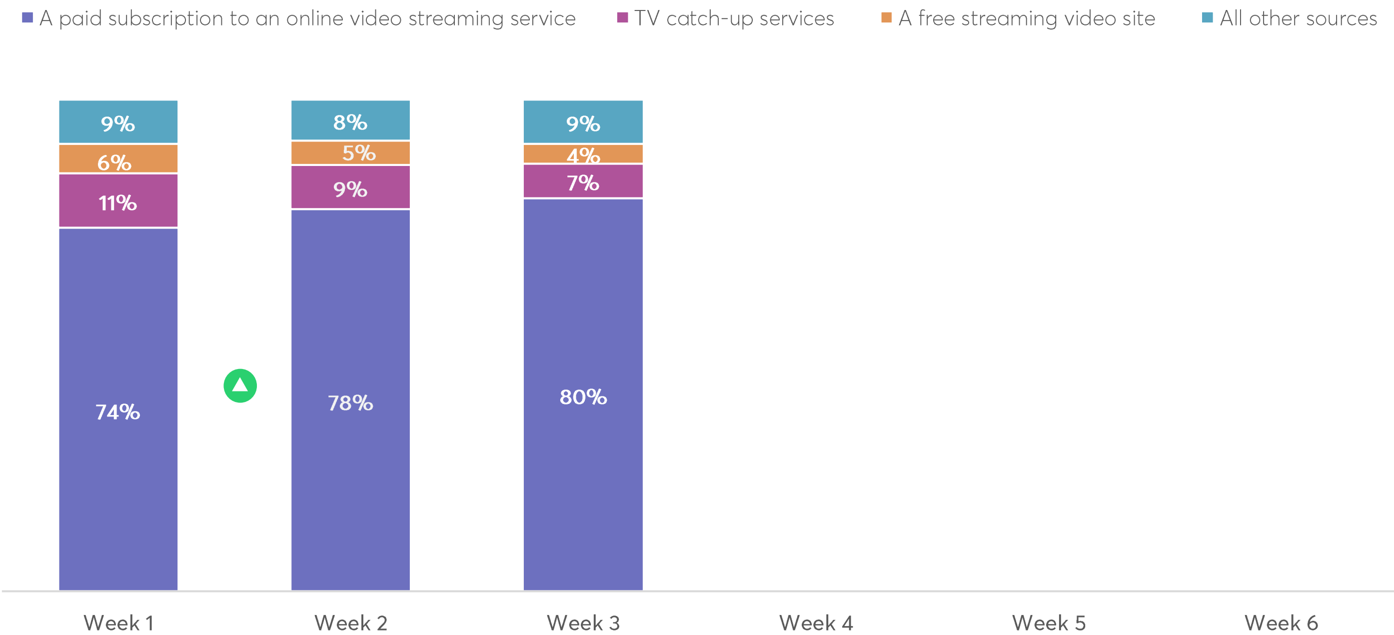
Streaming activity:



Streaming sources:



Share of streaming across sources



Base: Wave 3 – 'Streaming activity', 'Physical purchasing' (Total sample, n=2,369), 'Median time spent watching films each day' (Downloaded, streamed, or purchased films in past week, n=1,271), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly film streamers, n=1,116-1,124)

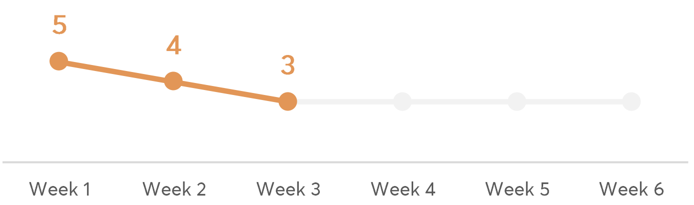
CATEGORY 03

TV

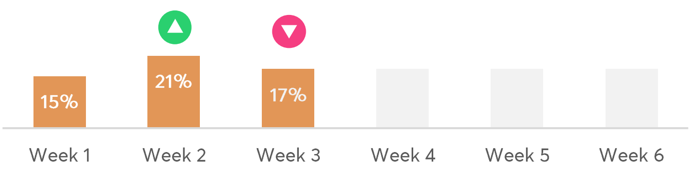
- Median hours spent watching TV decreased slightly from 3.5 to 3.3 hours per day.
- The number of respondents downloading TV shows decreased by 4 percentage points to 17%, while the median number of downloads dropped from 4 to 3.
- The proportion using partly or wholly illegal streaming sources declined from 16% to 12%. The number using only illegal sources remained the same at 6%, while the number using a mix of legal and illegal downloading sources decreased, by 4 percentage points to 6%.
- For share of downloading across sources, "saving offline on a paid for subscription service" remains the dominant method of downloading, gaining 3 percentage points to 57%. "TV catch-up services" declined by another 2 percentage points to 21%.
- The proportion of respondents streaming TV decreased by 5 points to 48%. The median number of hours spent streaming per week remained the same at 5.
- The proportion using partly or wholly illegal streaming sources saw very little difference (drop of 1 percentage point to 7%).
- There were no noteworthy changes in the share of streaming across sources.
- There was a 1 percentage point increase in the proportion of those who made a physical purchase (to 6%).

DOWNLOADING

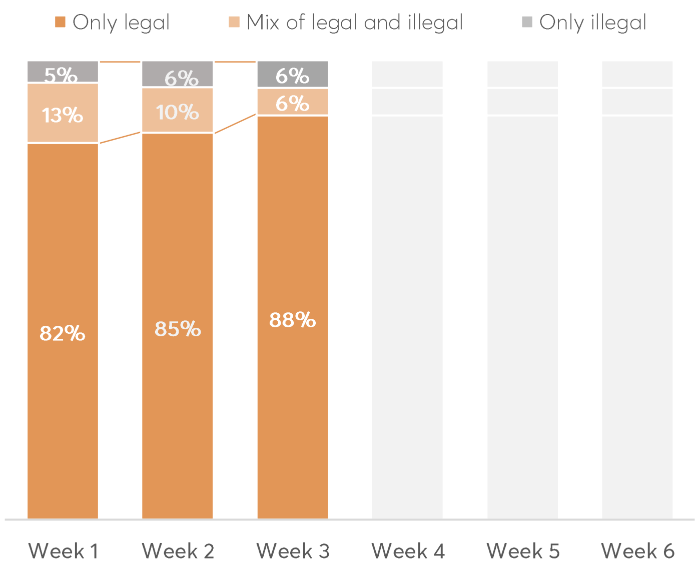
Median number of downloads in past week:



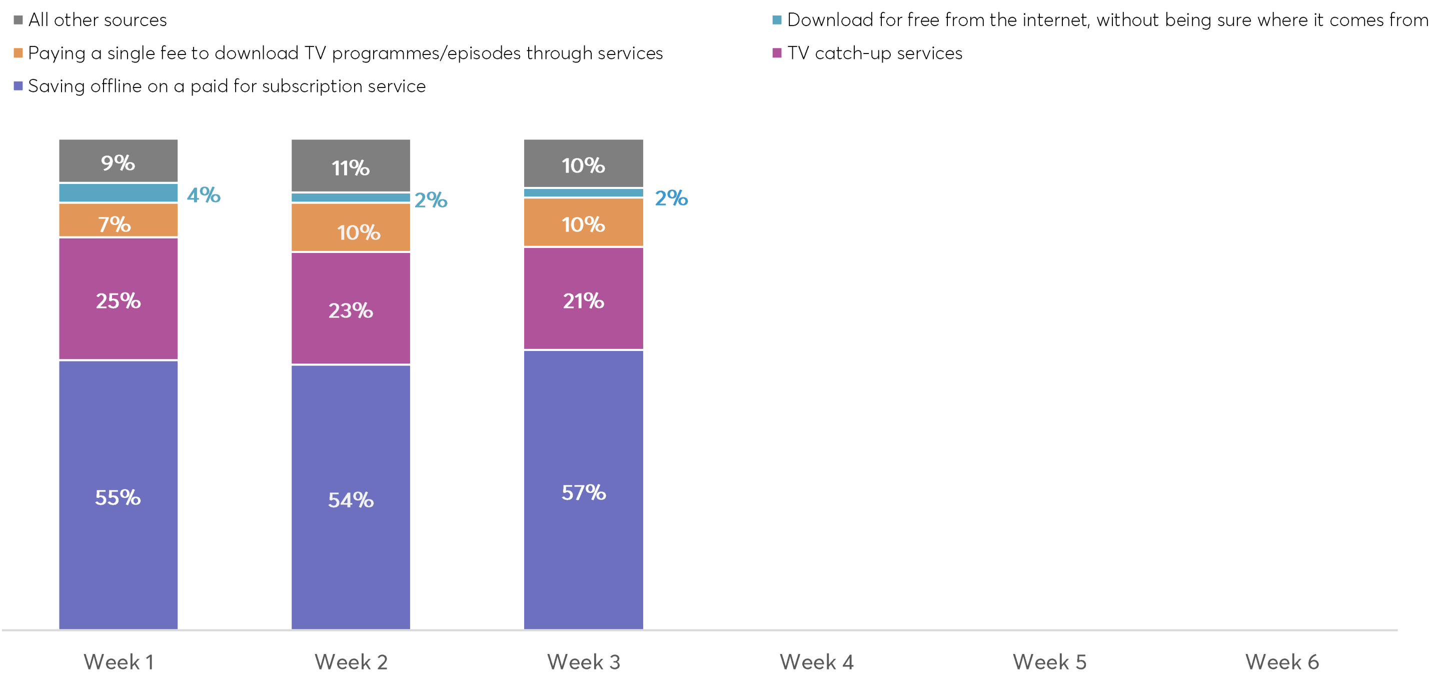
Downloading activity:



Downloading sources:



Share of downloading across sources

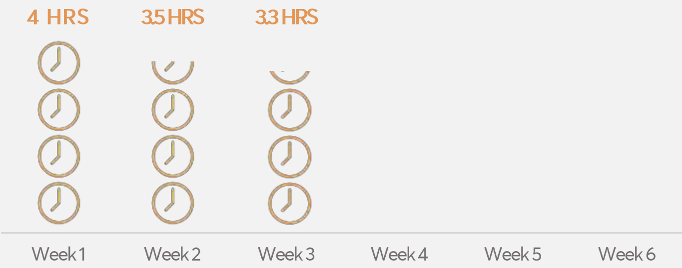


Base: Wave 3 – 'Downloading activity' (Total sample, n=2,369), 'Median number of downloads in past week', 'Downloading sources' and 'Share of downloading across sources' (Weekly TV downloaders, n=394-405)

CATEGORY 03

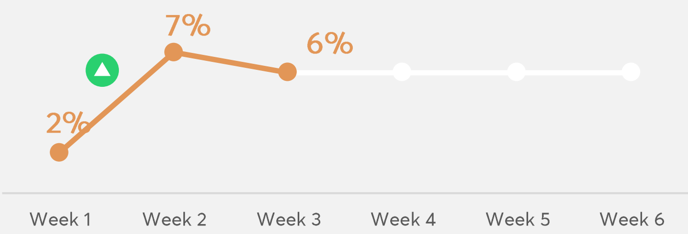
TV

Median time spent watching TV each day*:



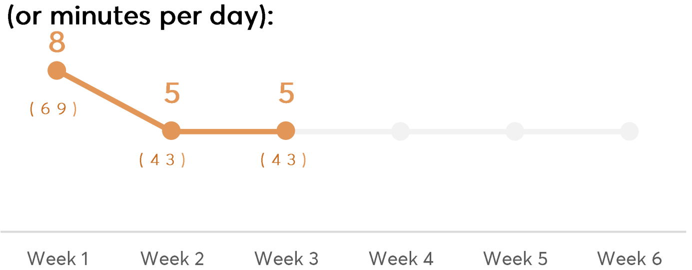
* Any format (online or offline)

Physical purchasing:

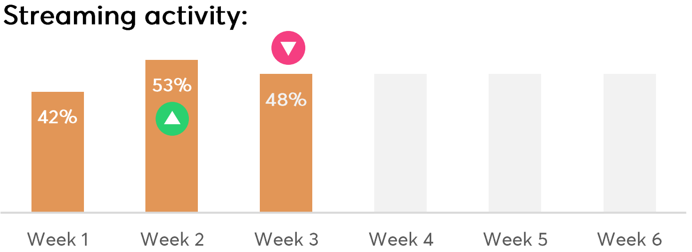


STREAMING

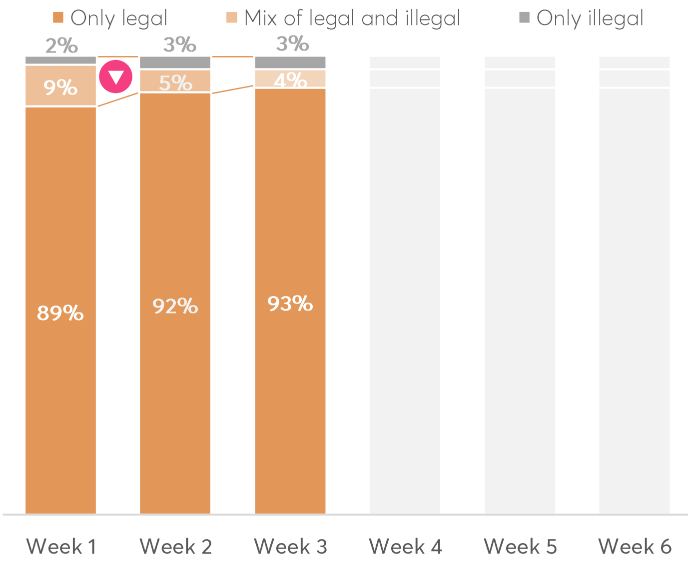
Median hours spent streaming in past week (or minutes per day):



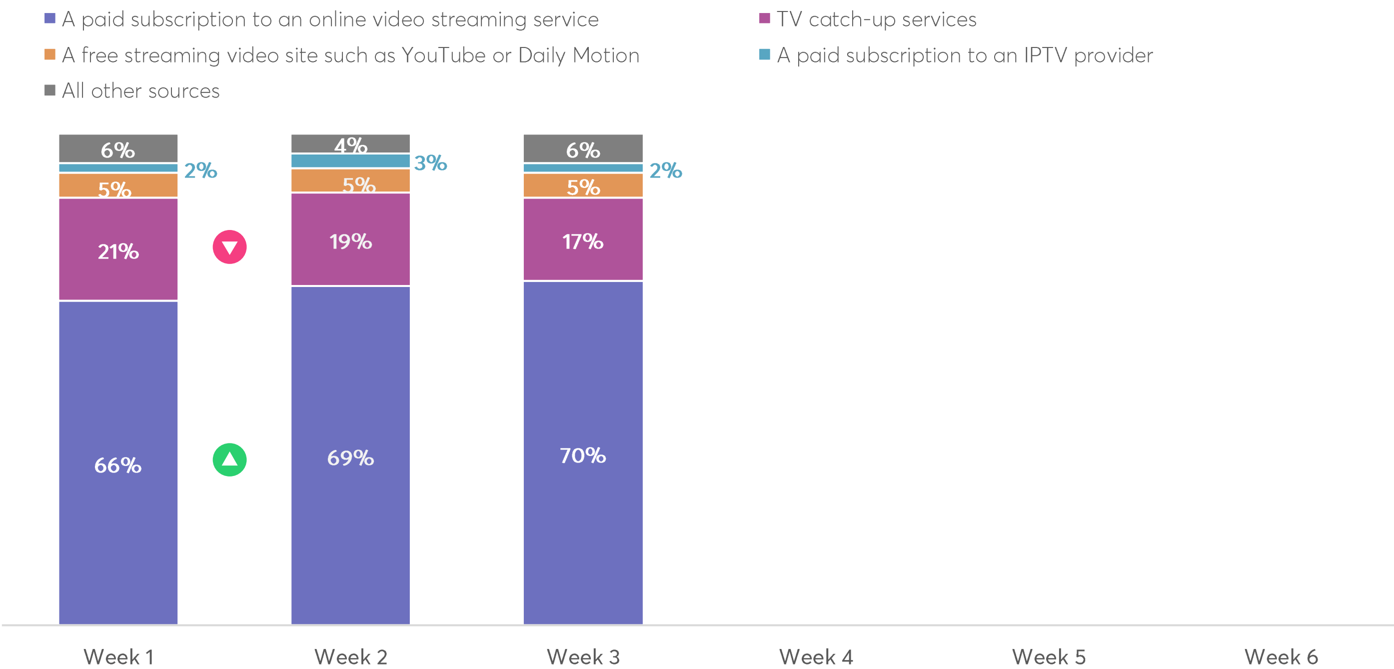
Streaming activity:



Streaming sources:



Share of streaming across sources



Base: Wave 3 – 'Streaming activity', 'Physical purchasing' (Total sample, n=2,369), 'Median time spent watching TV each day' (Downloaded, streamed, or purchased TV programmes/episodes in past week, n=1,230), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly TV streamers, n=1,110-1,117)

CATEGORY 04

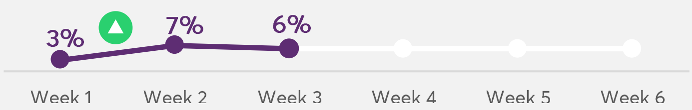
Video Games

Median time spent playing video games each day*:

3 HRS	3 HRS	3 HRS			
Week 1	Week 2	Week 3	Week 4	Week 5	Week 6

* Any format (online or offline)

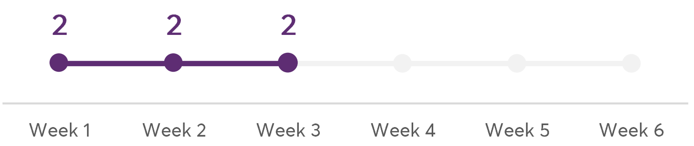
Physical purchasing:



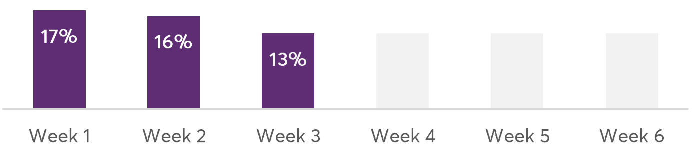
- Median hours spent playing video games remained at 3 hours per day.
- The proportion of respondents downloading/accessing declined by 3 percentage points to 13%. The median number of games downloaded/accessed also remained unchanged at 2 per week.
- The proportion using partly or wholly illegal downloading sources increased from 8% to 12%. The proportion using only illegal sources saw a small increase to 3%, while the number using a mix of legal and illegal downloading sources increased, by 3 percentage points, to 9%.
- There were no noteworthy changes in the share of downloading across sources.
- The number of respondents purchasing physical copies remained around the same (6%) compared with the previous week.

DOWNLOADING/ACCESSING

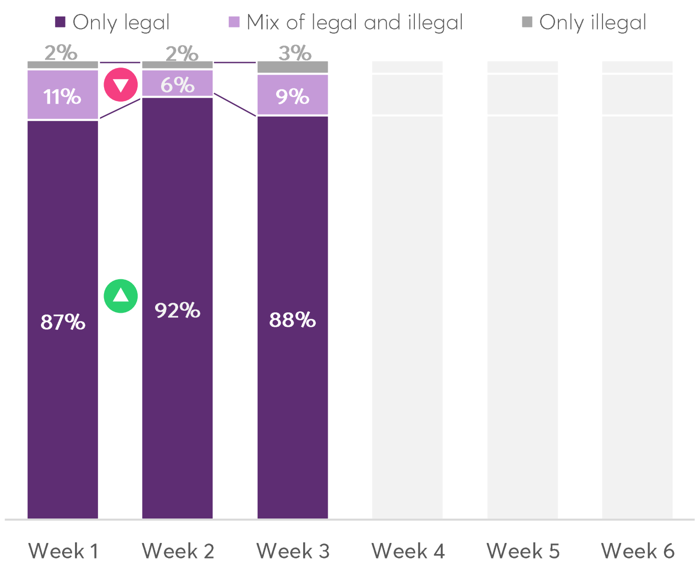
Median number downloaded/accessed in past week:



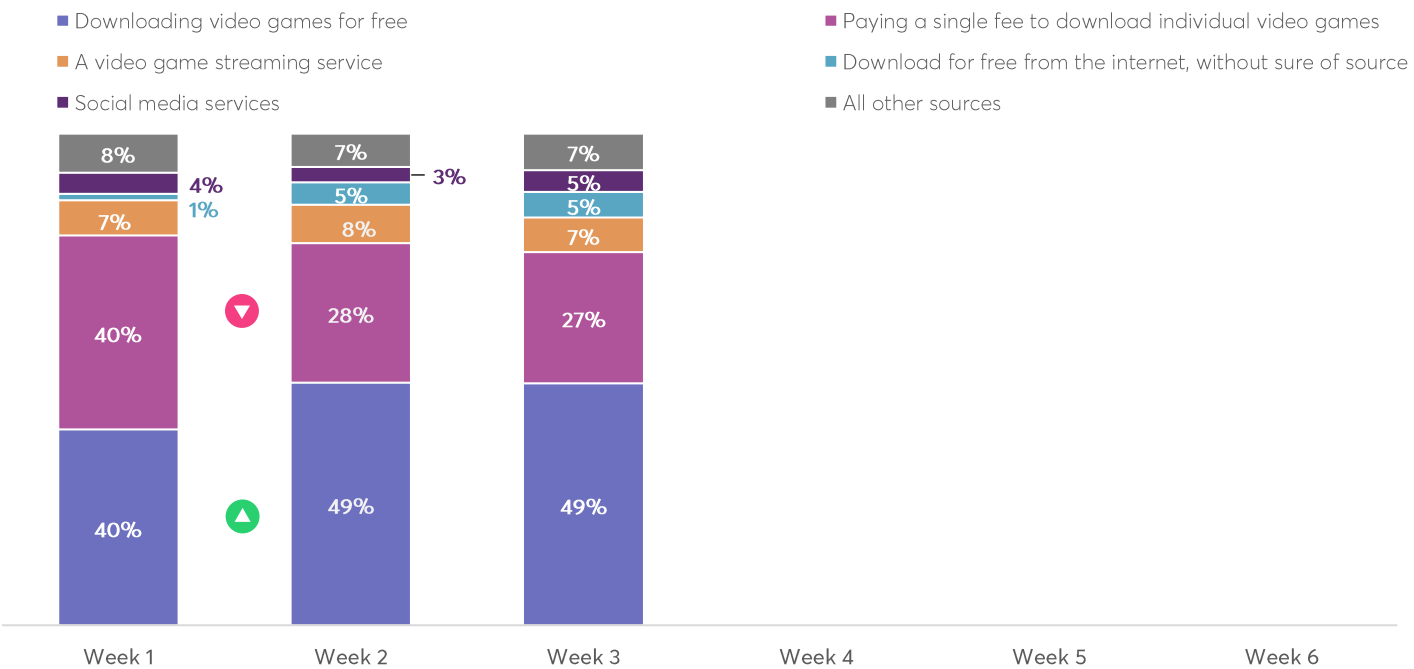
Downloading/accessing activity:



Downloading/accessing sources:



Share of downloading/accessing across sources



Base: Wave 3 – 'Downloading/accessing activity', 'Physical purchasing' (Total sample, n=2,369), 'Median time spent playing games each day' (Downloaded, streamed, or purchased video games in past week (n=341), 'Median hours spent downloading/accessing in past week', 'Streaming sources' and 'Share of downloading/accessing across sources' (Download/access video games weekly, n=279-290)

CATEGORY 05

E-publishing

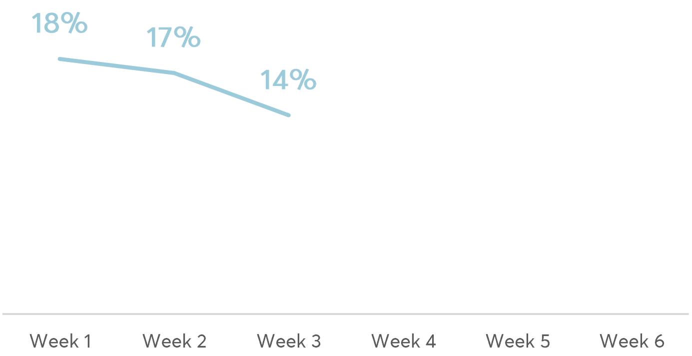
- Median hours spent reading remained at 2 hours per day for books and audiobooks and 1 hour for digital magazines.
- 14% had downloaded or accessed an **e-book** which was a decrease of 3 percentage points from the previous week.
- For **e-books,** the proportion using partly or wholly illegal downloading sources increased from 14% to 18%. While the proportion using a mix of legal and illegal sources remained unchanged at 7%, the number using only illegal sources increased by 4 percentage points to 11%.
- There were no noteworthy changes in the share of downloading/accessing **e-books** across sources.
- 8% had downloaded or accessed a **digital magazine**, which was was broadly unchanged from the previous week.
- The proportion using partly or wholly illegal downloading sources to download **digital magazines** remained unchanged at 20%.
- There were no noteworthy changes in the share of downloading/accessing **digital magazines** across sources.
- 6% had downloaded or accessed an **audiobook**, which was unchanged from the previous week.
- For **Audiobooks**, the proportion using partly or wholly illegal downloading sources increased by 8 percentage points to 26%. While the proportion using only illegal sources remained unchanged at 13%, the number using a mix of legal and illegal sources increased by 7 percentage points to 13%.
- The share of sources used to access **audiobooks** saw a slight increase for subscription services (from 30% to 36%). "Accessing content made available for free by publishers on their own social media or website" and "paying a single fee to download audiobooks" both saw a decrease, to 22% and 8% respectively.
- Physical purchasing remained in line with the previous week for **audiobooks** and **magazines**, while **books** saw a 3 percentage point decline, to 11%.

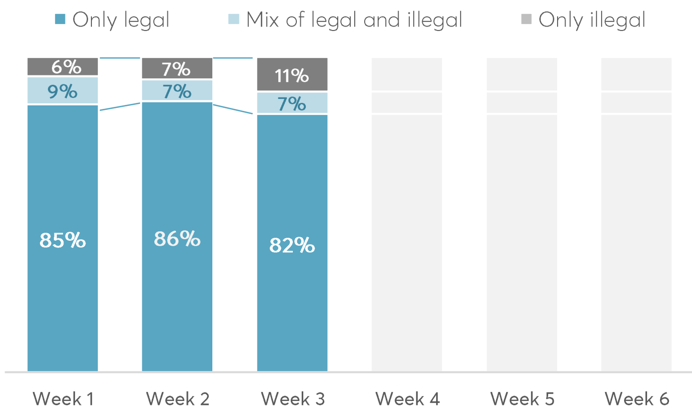
DOWNLOADING/ACCESSING

Downloading/accessing activity:

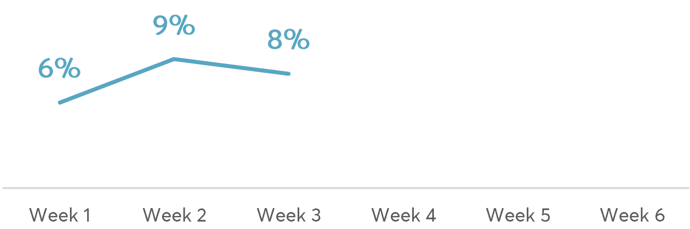
Downloading/accessing sources:

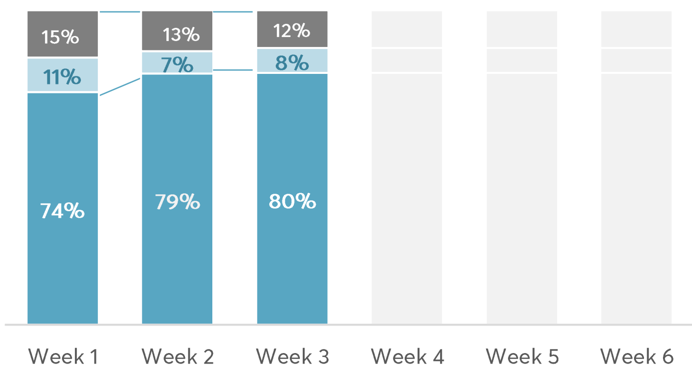
E-BOOKS



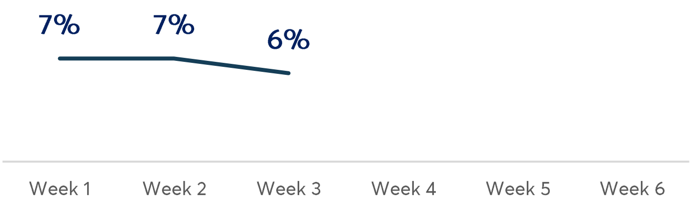


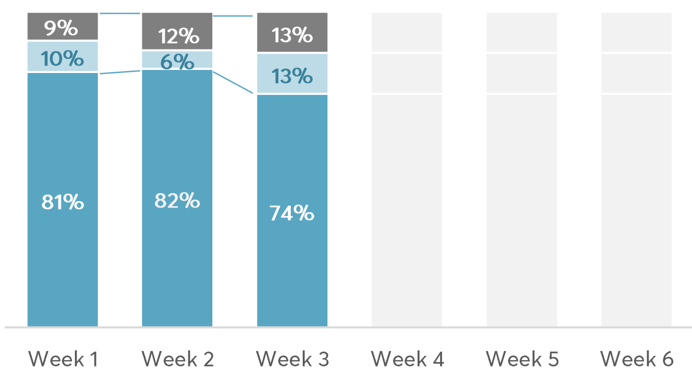
DIGITAL MAGAZINES





AUDIOBOOKS





Base: Wave 3 – 'Downloading/accessing activity', (Total sample, n=2,369), 'Downloading/accessing sources' (Weekly E-book consumers n=300, Weekly Digital magazine consumers n=170, Weekly Audiobook consumers n=130)

CATEGORY 05

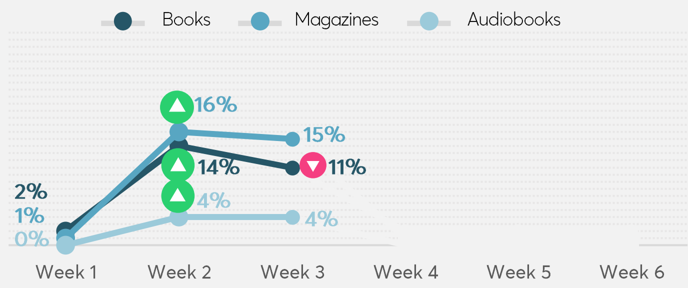
E-publishing

Median time spent reading/listening each day*:

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Books						
	2 HRS	2 HRS	2 HRS			
Magazines						
	1 HRS	1 HRS	1 HRS			
Audiobooks						
	1 HRS	2 HRS	2 HRS			

* Any format (online or offline)

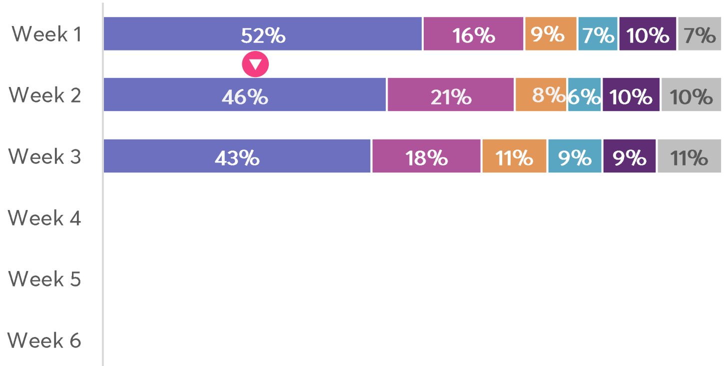
Physical purchasing:



DOWNLOADING/ACCESSING

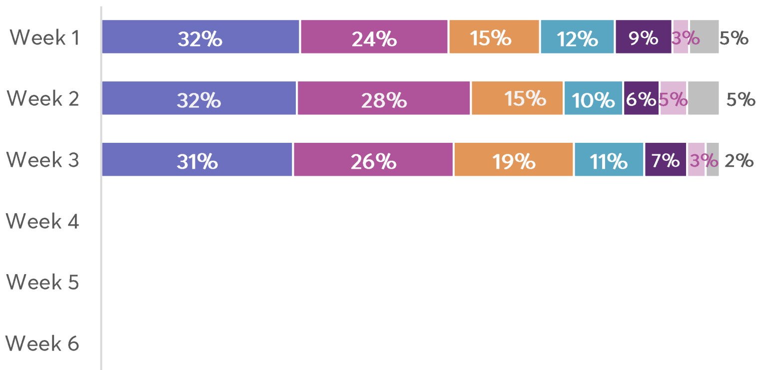
Share of downloading/accessing across sources

E-BOOKS



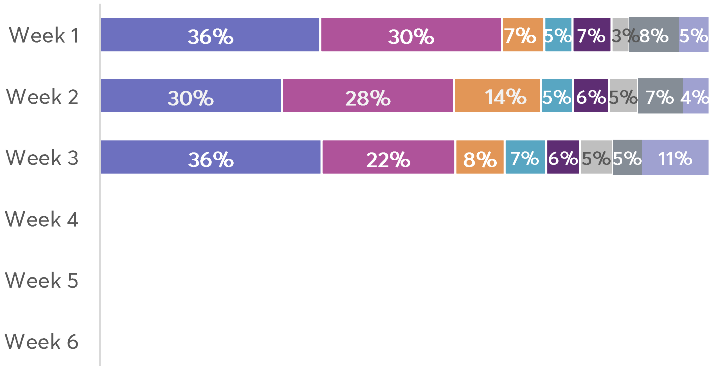
- Paying a single fee to download individual e-books
- Pay for a subscription to a service that allows you to download or read e-books online
- Accessing content made available online by a library
- A free website which hosts or links to e-books I would otherwise expect to pay for
- Accessing content made available for free by publishers on their own social media or website
- All other sources

DIGITAL MAGAZINES



- Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online
- Accessing content made available for free by publishers on their own social media or website
- Paying a single fee to download or read individual issues of digital magazines
- A free website which hosts or links to digital magazines I would otherwise expect to pay for
- Other
- Downloading/accessing for free from the internet, without really being sure where it comes from
- All other sources

AUDIOBOOKS



- Pay for a subscription to a service that allows you listen to audiobooks online
- Paying a single fee to download individual audiobooks
- Accessing content made available for free by publishers on their own social media or website
- Other
- A free website which hosts or links to audiobooks I would otherwise expect to pay for
- Ripping audio books from sites such as YouTube
- Accessing content made available online by a library
- All other sources

Base: Wave 3 – 'Physical purchasing' (Total sample, n=2,369), 'Median time spent reading/listening each day' (Downloaded/accessed or purchased in past week – E-books n=300, Digital magazines n=170, Audiobooks n=130), 'Share of downloading/accessing across sources' (Weekly E-books consumers n=471, Weekly Digital magazine consumers n=463, Weekly Audiobooks consumers n=167)

Other content consumption

This week, analysis has been broken down to include total consumption in the last week, as well as frequency (i.e. daily and less than daily).

01. CONTENT THAT PEOPLE READ OR WATCH:

For total consumption in the week, there were no notable changes for most categories from week 2 to week 3 (with only directional shifts of 1 or 2 percentage points).

There were, however, notable decreases for "watching videos made by others" on a daily basis and for "watching live media streams/broadcasts" in the last week. Watching or reading news continues to be the activity carried out the most – especially on a daily basis.

02. SOCIAL AND WORK-RELATED INTERACTIONS:

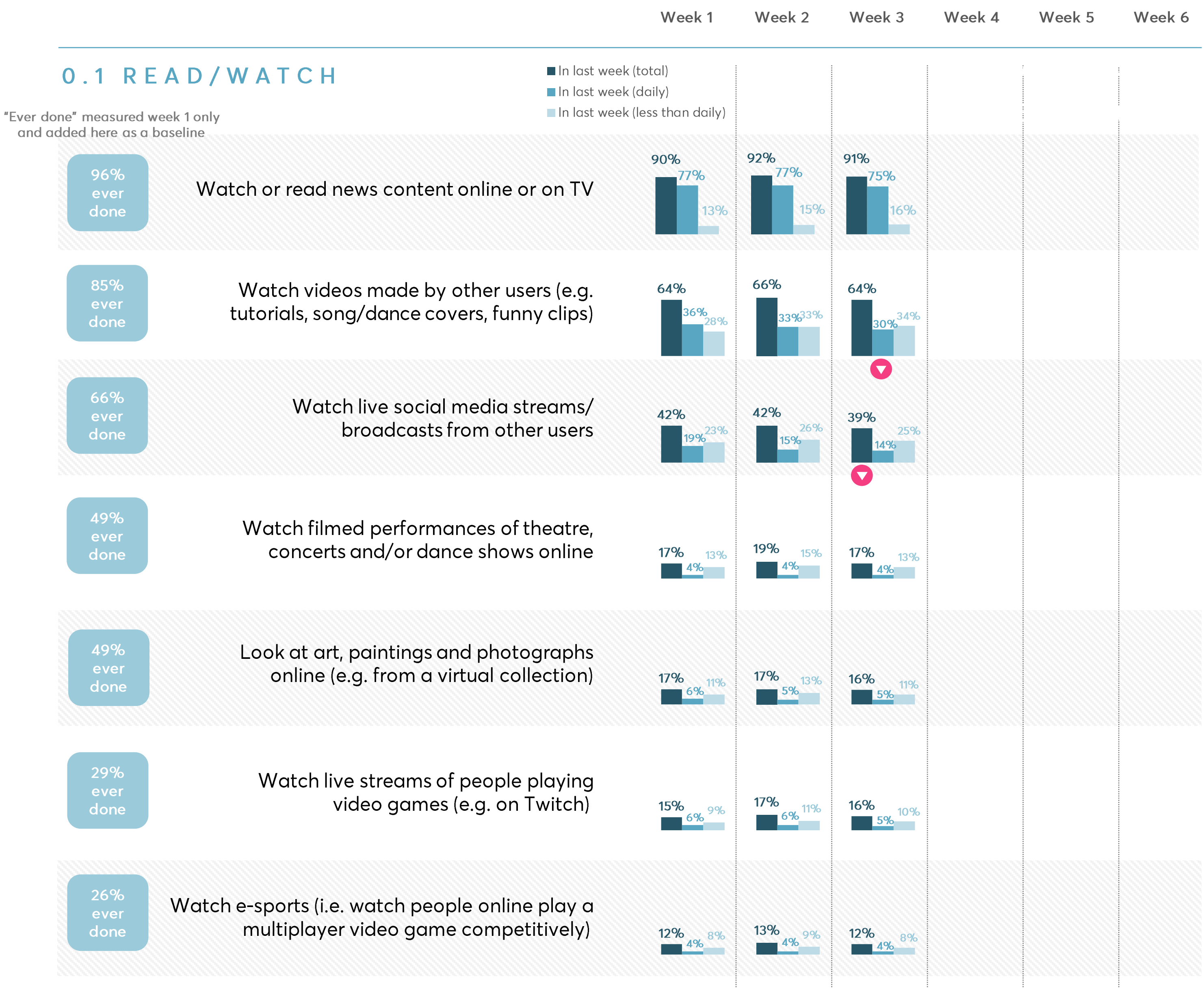
In terms of using video software – either for "social activities with friends/family" or to "conduct work meetings", there were no notable changes week on week. There was, however, a notable decline of 3 or 4 percentage points in the total consumption for the week for "looking at, commenting on or liking social media content/posts" from other users or celebrities.

03. ACTIVE PARTICIPATION IN FITNESS AND/OR LEARNING ACTIVITIES:

For total consumption, "online learning" and "online fitness" both showed no notable changes, week on week. However, playing "online multiplayer video games" saw a notable decline of 2 percentage points to 21%.

04. CREATING AND SHARING CONTENT:

In terms of total weekly consumption for sharing/creating content there were no notable changes.



Base: Wave 3 Total sample (n= 2,369)

Other content consumption

0.2 INTERACT WORK/SOCIAL

■ In last week (total)
■ In last week (daily)
■ In last week (less than daily)

		Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
82% ever done	Look at, comment on, or 'like' social media posts from other users	71% / 51% / 20%	73% / 49% / 24%	70% / 47% / 24%			
68% ever done	Use video software for social activities with friends/family	51% / 19% / 33%	54% / 17% / 36%	53% / 16% / 38%			
57% ever done	Look at, comment on, or 'like' social media content posted by celebrities	39% / 23% / 16%	40% / 21% / 19%	36% / 20% / 16%			
38% ever done	Conduct work meetings via video software	26% / 10% / 15%	27% / 10% / 16%	28% / 11% / 17%			

0.3 ACTIVELY PARTICIPATE

■ In last week (total)
■ In last week (daily)
■ In last week (less than daily)

		Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
61% ever done	Online learning such as watch free to access videos (e.g. YouTube Tutorials) or enrolling on courses	32% / 12% / 19%	30% / 12% / 18%	30% / 12% / 18%			
37% ever done	Play online multiplayer video games (e.g. Minecraft, Fortnite) on any device inc. smartphones	24% / 12% / 12%	23% / 11% / 13%	21% / 10% / 10%			
36% ever done	Take part in online fitness classes (e.g. on Instagram Live, YouTube Live or Zoom)	22% / 8% / 13%	22% / 8% / 13%	21% / 7% / 13%			

0.4 CREATE/SHARE

■ In last week (total)
■ In last week (daily)
■ In last week (less than daily)

		Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
63% ever done	Sharing images or videos online that are not created by you	36% / 14% / 21%	38% / 12% / 26%	36% / 12% / 24%			
50% ever done	Create and post your own videos/written/audio content online (e.g. on Instagram, YouTube, TikTok)	24% / 8% / 16%	26% / 7% / 19%	24% / 7% / 17%			
29% ever done	Make content you own (e.g. music, films/shows, books) publicly available by uploading files or links online	12% / 4% / 7%	12% / 4% / 8%	12% / 5% / 7%			

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WAVE 3 OF 6 | MAY 2020

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