Creative Industries
Policy & Evidence Centre
Led by nesta

Digital Culture - Consumer Tracking Study

WAVE 4 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 3 and week 4.

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	4th- 10th May		
N=	3,863	2,792	2,369	2,132		

*Key:

▲ Indicates a significant increase on the previous week
▼ Indicates a significant decrease on the previous week

Overview (1 of 2)

Time Consuming Content (Daily)

The median amount of time spent consuming content per day, online or offline, remained largely stable for the fourth week in a row. For most categories, time changed marginally or stayed the same.

Although time spent watching TV was still lower than in week 1, it continued to have the highest median time across categories (3 hours and 30 minutes). This week also saw a slight increase compared to week 3, suggesting that watching TV may be on the rise after two consistent weeks of slight decreases.

Levels of Downloading, Streaming, Accessing

For a second week running, music, film and TV, saw some decreases in the overall proportion of downloads or streams. Music saw a significant decline for both streaming and downloading activity. However, while the proportion streaming music returned to week 1 level – suggesting the notable uplift in weeks 2 and 3 may have been temporary - music downloading fell to its lowest level, well below that of week 1. There was also a significant decrease in the proportion downloading films, which took it below that of week 1. There were small declines for TV week on week, however the levels remained comparable with, or higher than, those of week 1.

The proportion downloading/accessing video games has been declining every week. Week 4 saw another small decline on the previous week and is now significantly lower than week 1.

Looking at downloading/accessing within e-publishing, the general trend across the weeks continued. The proportions downloading/ accessing digital magazines and audiobooks remained fairly stable, while e-books saw a decline (to 12% vs. 18% in week 1).

Music, film and TV saw no change in the median number of hours spent streaming in the past week (3, 4 and 5 hours respectively).

Physical Purchasing

For most categories, there was a slight decline in the number of physical products purchased for the second week running, after a peak in week 2. However, all remain higher than week 1, suggesting that lockdown may have led to a genuine increase in the purchasing of physical formats.

Legal and Illegal Sources

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 music, film and TV -

Overview (2 of 2)

where downloading or streaming is measured separately - there were no significant changes week on week. However, looking back to week 1, there has since been a significant decline for film and TV in the total use of illegal methods for both downloading and streaming compared to week 4.

Whilst not a significant increase, the proportion for total use of illegal methods to download music increased almost to week 1 level after two lower weeks – and this was driven by a significant increase in the proportion of those using solely illegal methods (up 7 percentage points to 22%).

Looking at the total use of illegal methods for accessing/downloading video games, the proportion fell significantly to half of that of week 3 level (down to 6%).

Across e-publishing, there was no significant change in the total use of illegal methods for accessing/ downloading. However, for digital magazines there was an increase of 10 percentage points for those using solely illegal methods (up to 22%).

Other Content Categories

For other content categories, watching or reading news continues to be the dominant activity (91% weekly, 76% daily). The only significant change for week 4 compared with 3, was a decline in the total weekly level of those “watching live social media streams/ broadcasts…”.

However, looking across the weeks to date, we see trends emerging. Some categories have shown a downward trend overall in total weekly consumption. For others, while total weekly consumption has remained consistent, the frequency of engaging with them each week has reduced from daily to less than daily.

The activities seeing a general decrease in weekly engagement are: watching live social media streams/ broadcasts; looking at art, paintings online…; online learning such as watch free to access videos; and playing online multiplayer video games.

Those seeing a shift from daily to less than daily are: watching videos made by other users; looking at, commenting on, or ‘liking’ social media posts; using video software for social activities; looking at, commenting on, or ‘liking’ social media… by celebrities; and sharing images or videos online… not created by themselves.

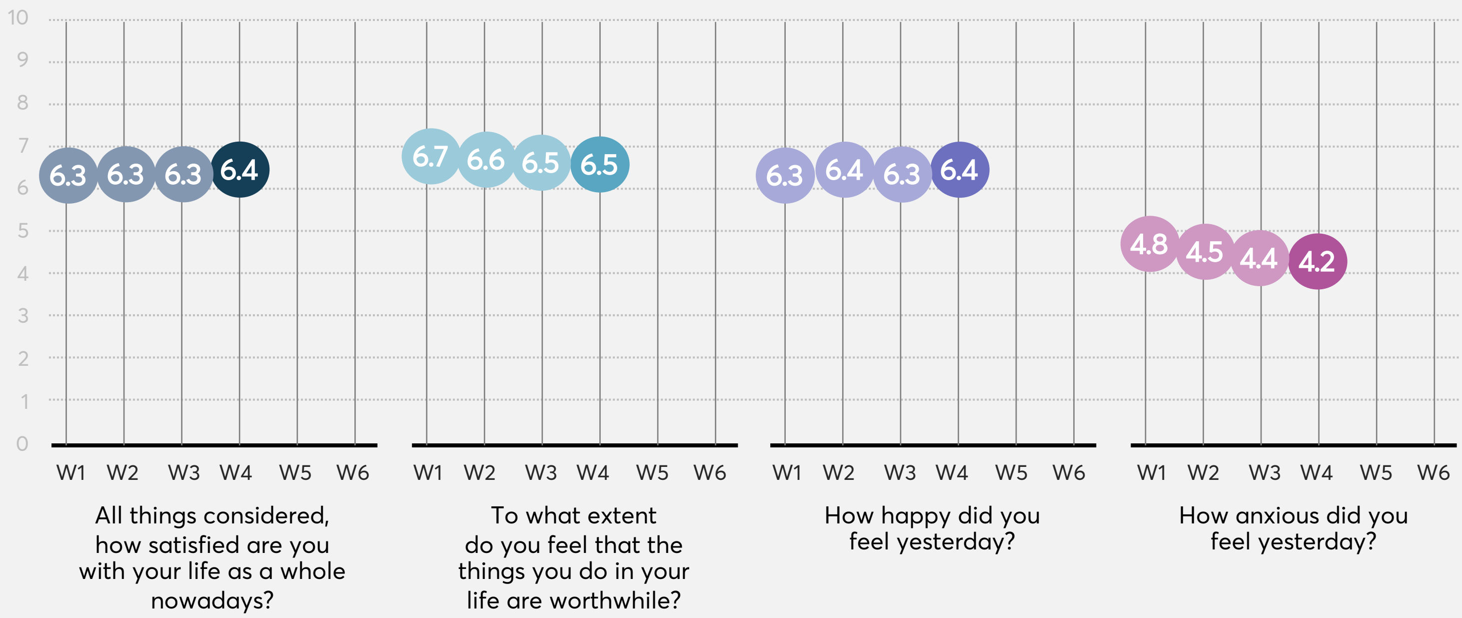
Wellbeing Measures

In terms of wellbeing measures, while the extent to which respondents feel that the things they do in life “are worthwhile” remained stable, this metric continues to be significantly lower than in week 1. Encouragingly, however, levels of “anxiety” continued to decline and were also significantly lower than in week 1.

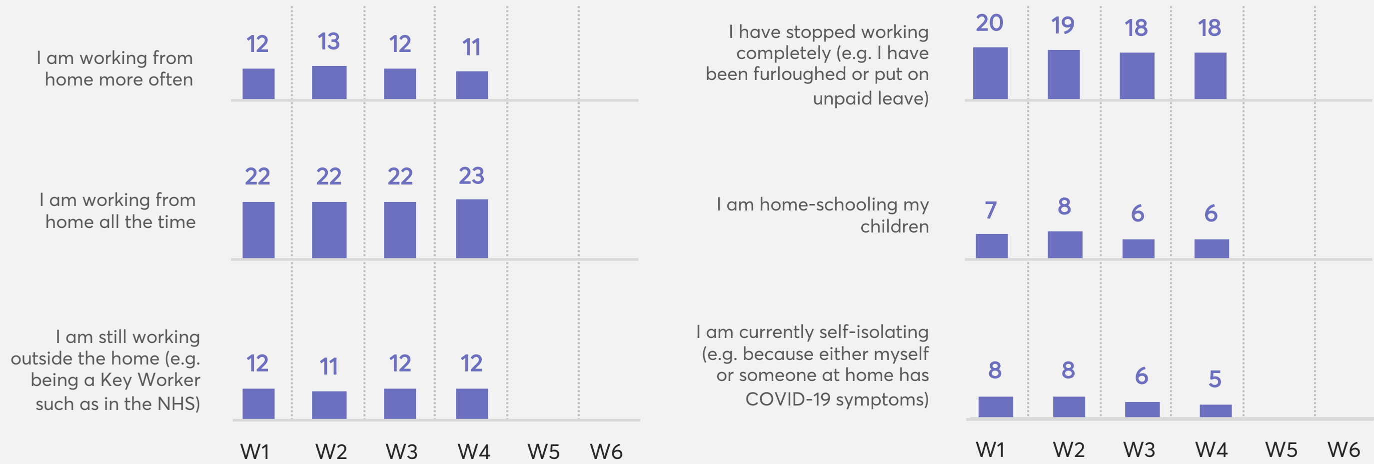
Wellbeing and Lifestyle

- Wellbeing measures showed no notable shifts between weeks 3 and 4. However, for anxiety ("how anxious did you feel yesterday?"), there was a continuation of the decline seen over the previous 3 weeks and is significantly lower than in week 1.
- The extent to which respondents feel that the things they do in life "are worthwhile", is significantly lower compared to week 1.
- Changes to work/lifestyle owing to COVID-19 were consistent with levels reported in week 3.

Wellbeing | Average (0 - 10)



Changes in work/lifestyle due to COVID-19



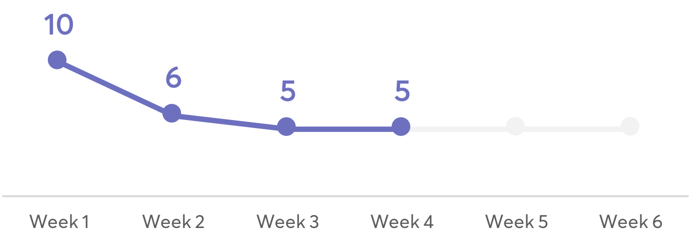
CATEGORY 01

Music

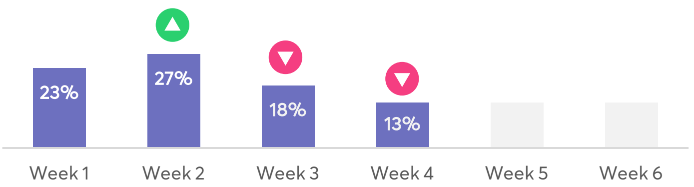
- Median hours spent listening to music dropped by 15 minutes to 2 hours 45 minutes.
- The number downloading music fell by 5 percentage points to 13%. The median number of downloads remained the same at 5.
- The proportion of those using partly or wholly illegal downloading sources increased by 4 percentage points to 31%. The number using solely illegal downloading sources increased notably, by 7 percentage points to 22%.
- Looking at downloading across sources, “Receiving a link to download music made available by someone else” increased notably from 1 to 4%. “Saving offline via a paid subscription service” was still the dominant method of downloading, despite a significant reduction (down 6 points).
- The proportion of respondents streaming music decreased notably by 6 points to 45%, almost to the same level as in week 1, indicating the uplifts noted in weeks 2 and 3 may have been temporary.
- 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, at 47%.
- There was a 1 percentage point decrease in the proportion who had made a physical purchase (5%).

DOWNLOADING

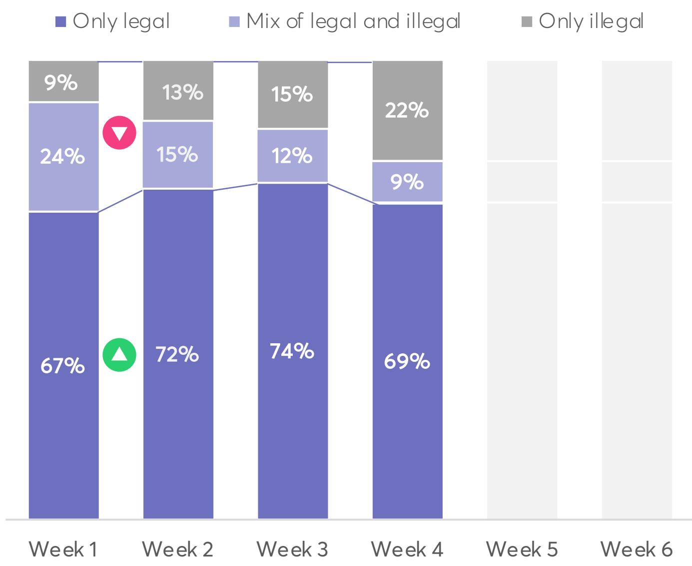
Median number of downloads in past week:



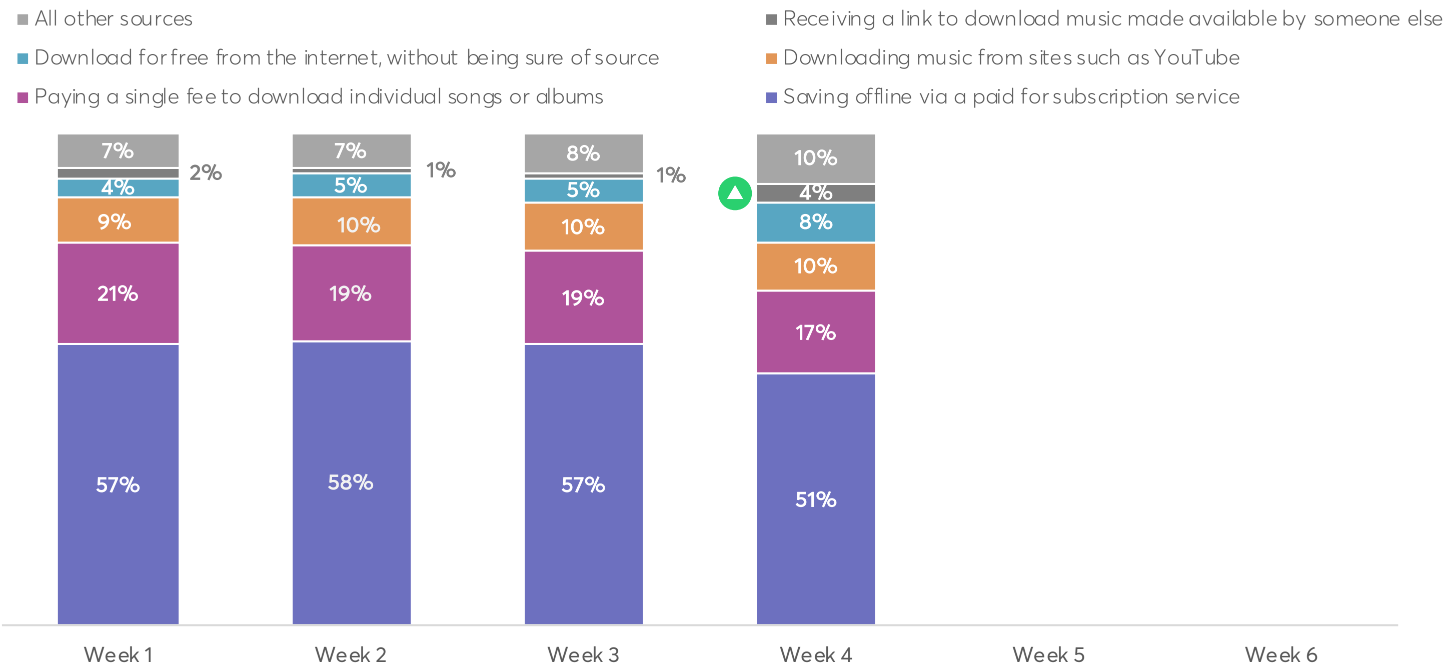
Downloading activity:



Downloading sources:



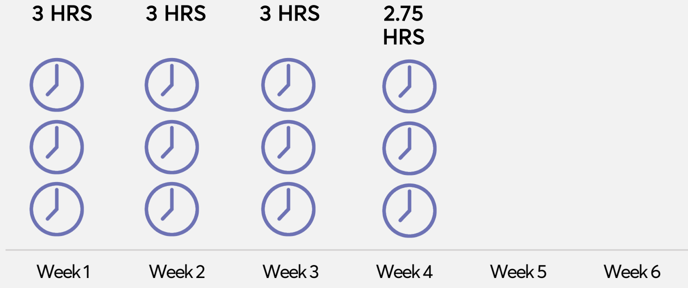
Share of downloading across sources:



CATEGORY 01

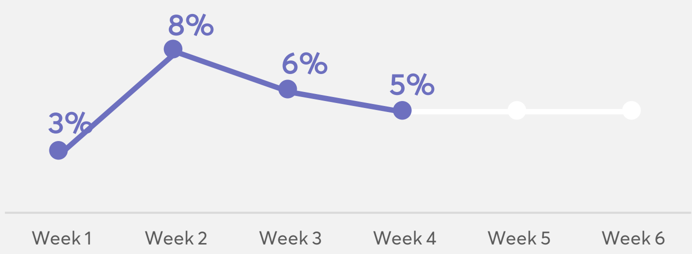
Music

Median time spent listening to music each day*:



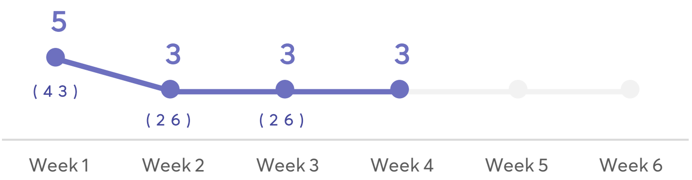
* Any format (online or offline)

Physical purchasing:

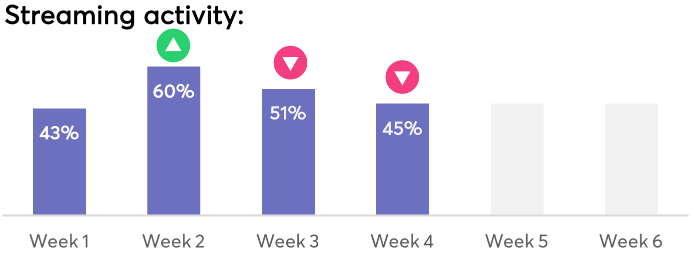


STREAMING

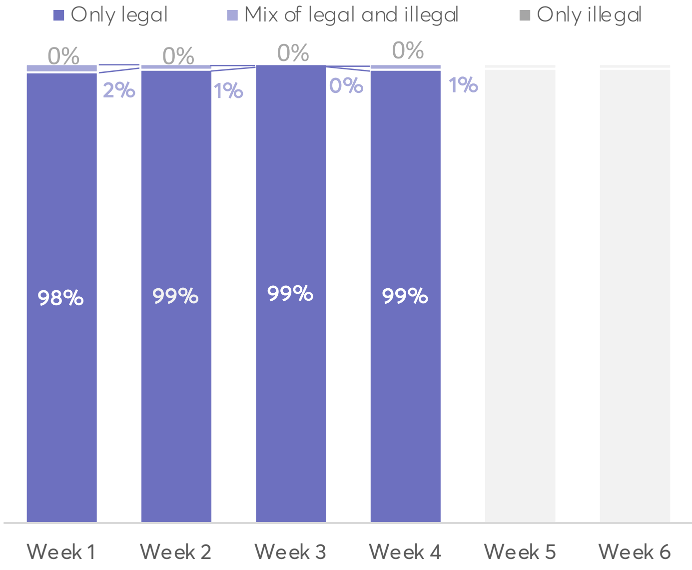
Median hours spent streaming in past week
(or minutes per day):



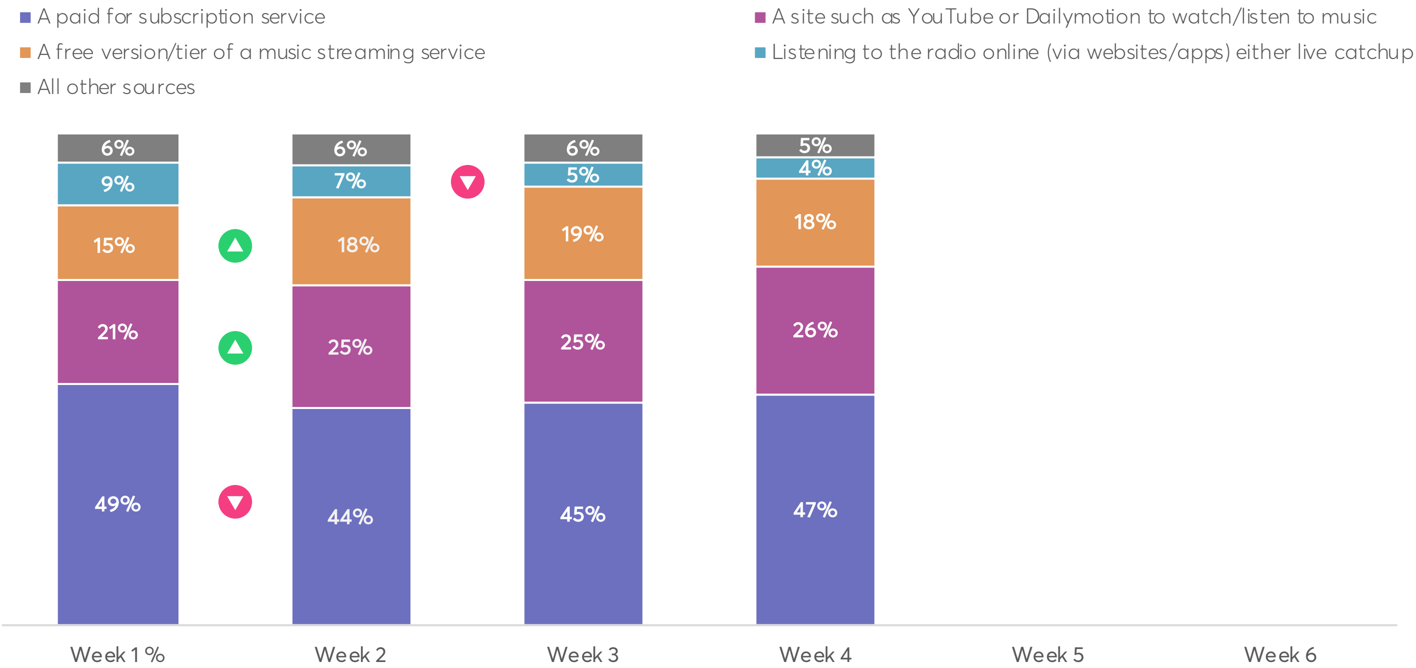
Streaming activity:



Streaming sources:



Share of streaming across sources:



Base: Wave 4 – 'Streaming activity', 'Physical purchasing' (Total sample, n=2,132), 'Median time spent listening to music each day' (Downloaded, streamed, or purchased music in past week, n=1,042), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly music streamers, n=956-976)

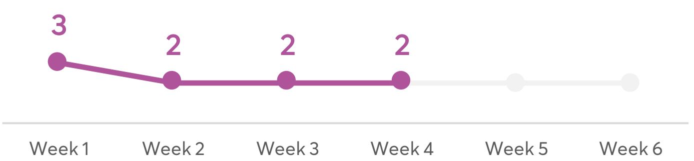
CATEGORY 02

Film

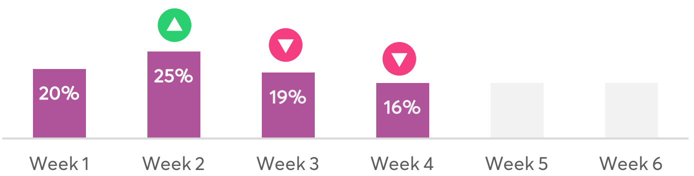
- Median hours spent watching films remained unchanged at 3 hours per day.
- The number downloading films decreased by 3 percentage points to 16% (3 points lower than week 1), while the median number of downloads remained at 2.
- There were no notable changes in the legal/illegal mix of downloading sources overall. The proportion using partly or wholly illegal downloading sources was 14%.
- "Saving offline via a paid for subscription service" remained the dominant method of downloading film, but this saw a decrease in share by 3 percentage points, back down to 62%. "Paying a single fee to download individual films/movies" increased by 4 percentage points to 17%.
- The proportion streaming films decreased by 1 percentage point to 47% - just 1 point above week 1 level.
- Median hours spent streaming films remained unchanged at 4 hours per week.
- There were no notable changes in the legal/illegal mix of streaming sources overall. The proportion using partly or wholly illegal streaming sources was 8%.
- 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 2 percentage points to 82%. TV catch-up services, meanwhile, saw a further 2 percentage point decline in share (to 5%).
- There was a 2 percentage point decrease in the proportion of those who had made a physical purchase (to 8%).

DOWNLOADING

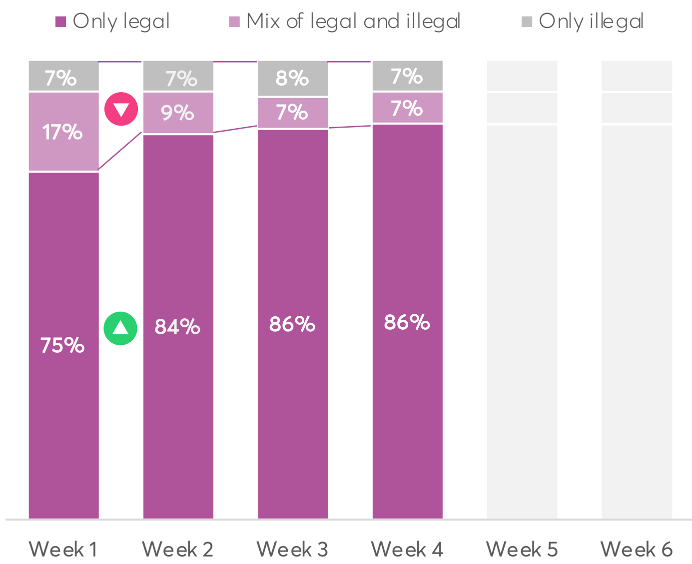
Median number of downloads in past week:



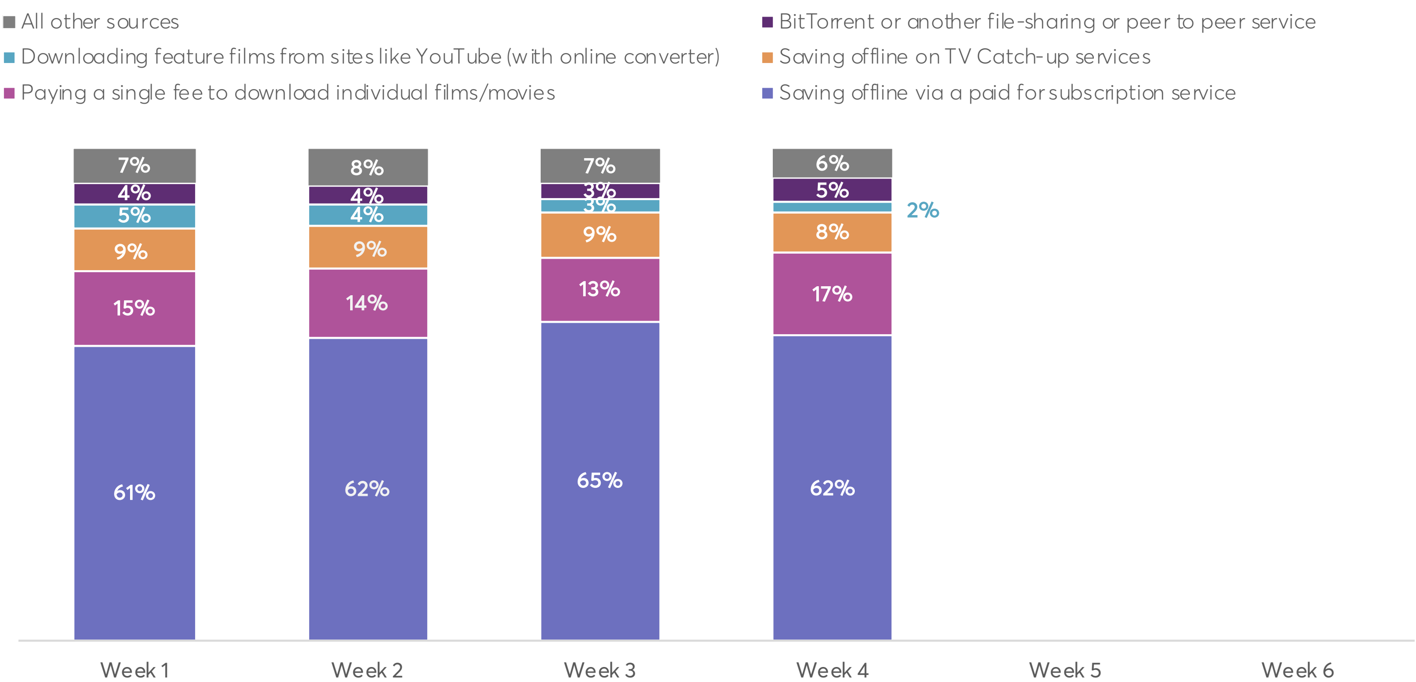
Downloading activity:



Downloading sources:



Share of downloading across sources:



Base: Wave 4 – 'Downloading activity' (Total sample, n=2,132), 'Median number of downloads in past week', 'Downloading sources' and 'Share of downloading across sources' (Weekly film downloaders, n=345-355)

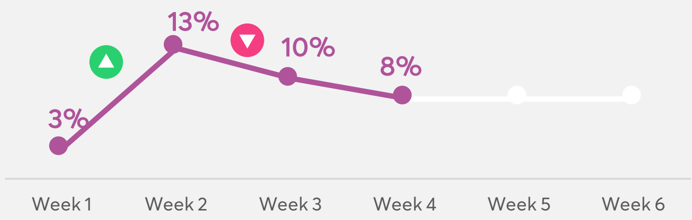
CATEGORY 02

Film

Median time spent watching films each day*:

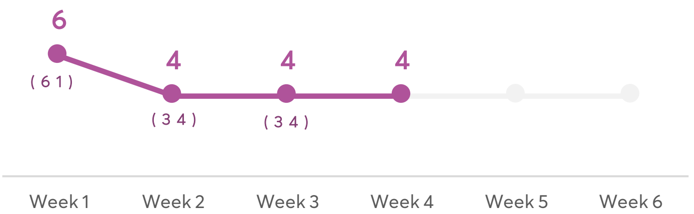
* Any format (online or offline)

Physical purchasing:

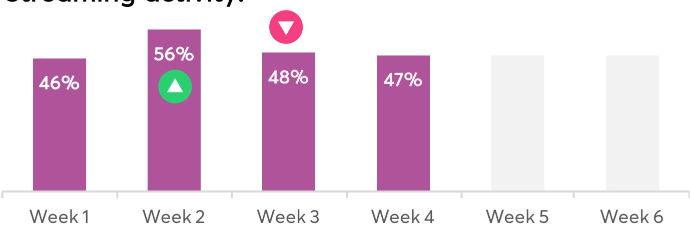


STREAMING

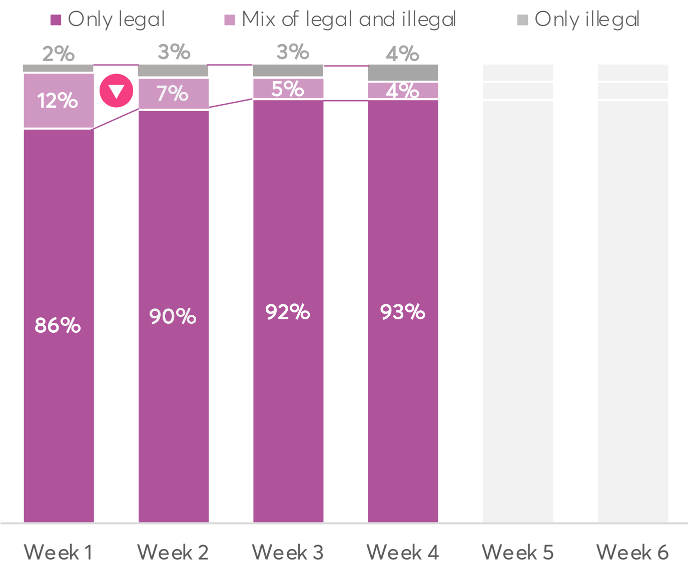
Median hours spent streaming in past week
(or minutes per day):



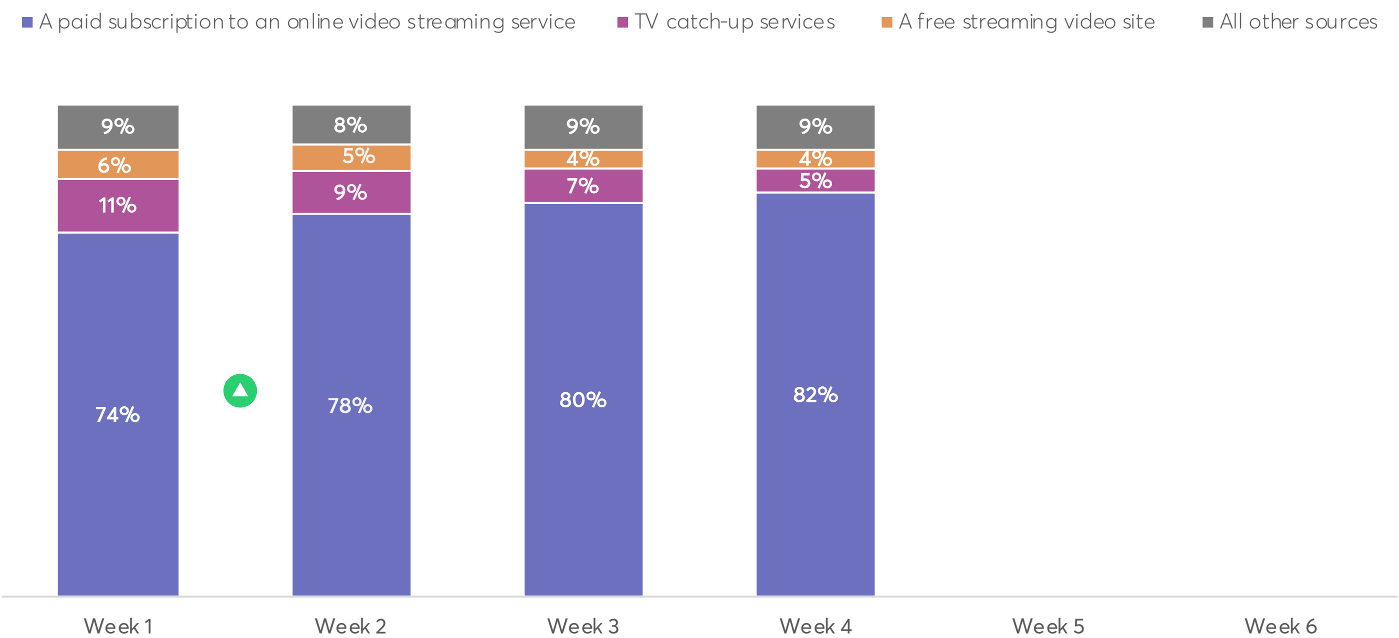
Streaming activity:



Streaming sources:



Share of streaming across sources



Base: Wave 4 – 'Streaming activity', 'Physical purchasing' (Total sample, n=2,132), 'Median time spent watching films each day' (Downloaded, streamed, or purchased films in past week, n=1,102), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly film streamers, n=1,012-1,022)

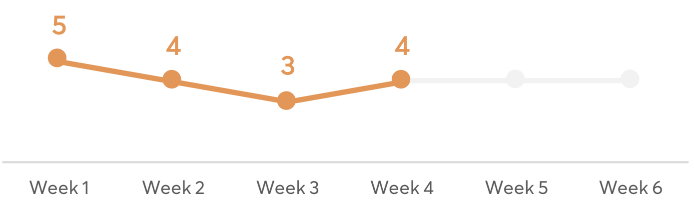
CATEGORY 03

TV

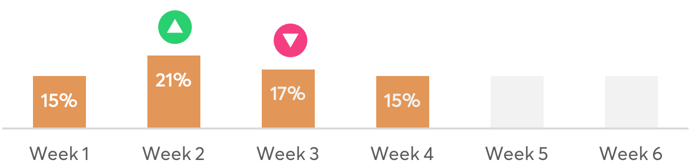
- Median hours spent watching TV returned to week 2 level at 3.5 hours per day.
- The number downloading TV shows decreased by 2 percentage points to 15%, however the median number of downloads increased from 3 back up to 4.
- There were no notable changes in the legal/illegal mix of downloading sources overall. The proportion using partly or wholly illegal downloading sources was 12%.
- For share of downloading across sources, “saving offline on a paid for subscription service” remained the dominant method of downloading with 56%, losing just 1 percentage point since week 3. “TV catch-up services” regained 2 points, and also returned to week 2 level, at 23%.
- The proportion of respondents streaming TV decreased by 2 points to 46%. The median number of hours spent streaming per week remained the same at 5.
- There were no notable changes in the legal/illegal mix of streaming sources overall. The proportion using partly or wholly illegal streaming sources was 7%.
- For share of streaming across sources, a “paid subscription to an online video streaming service ” remained the dominant method with 72%, up 2 percentage points on week 3.
- There was a 1 percentage point drop in the proportion of those who had made a physical purchase (to 5%).

DOWNLOADING

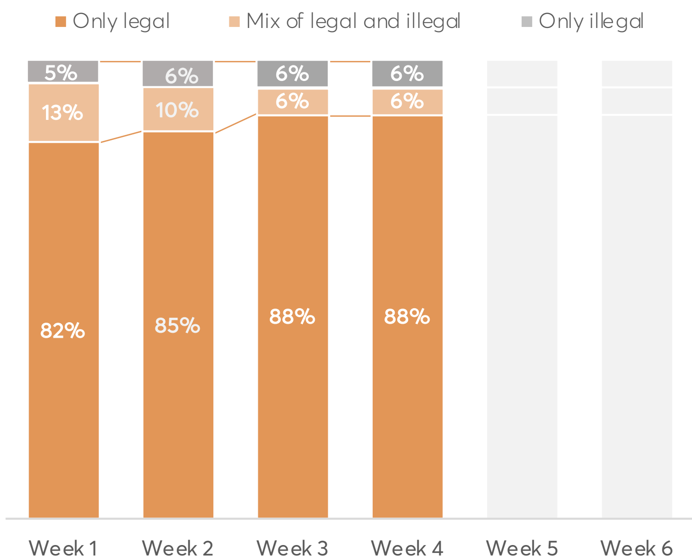
Median number of downloads in past week:



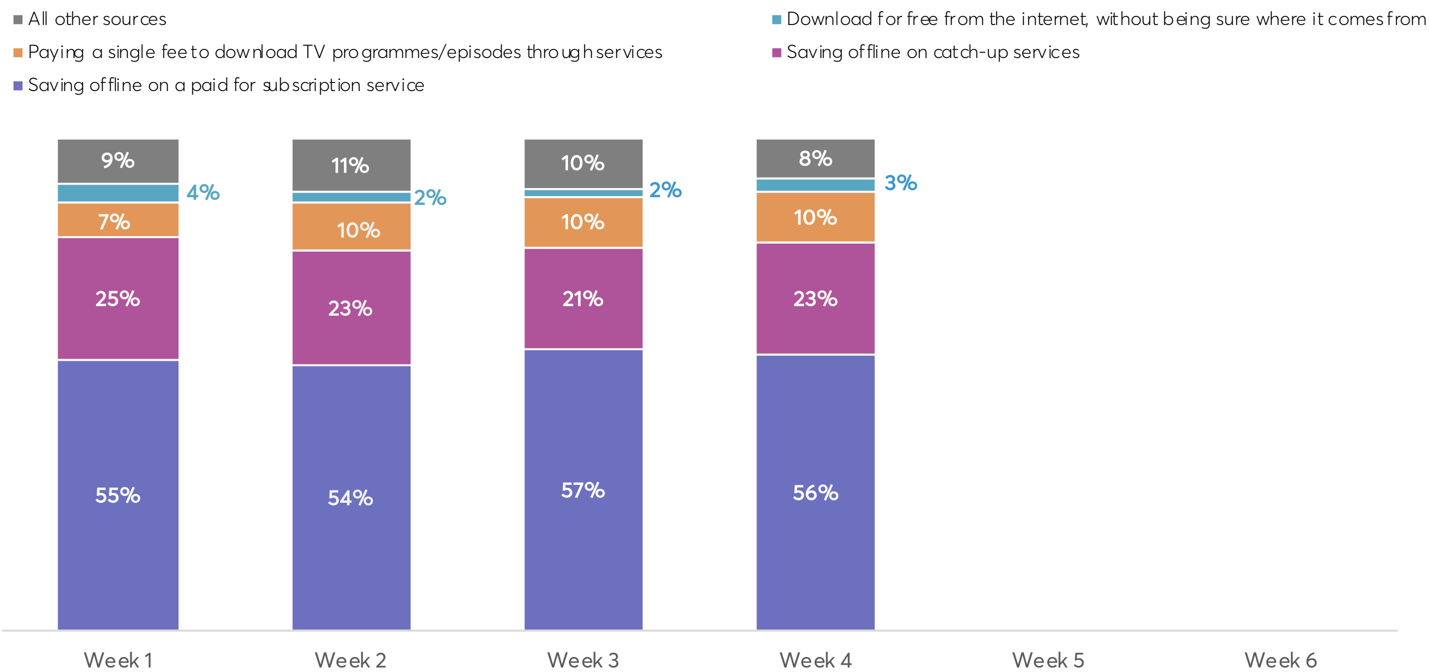
Downloading activity:



Downloading sources:



Share of downloading across sources



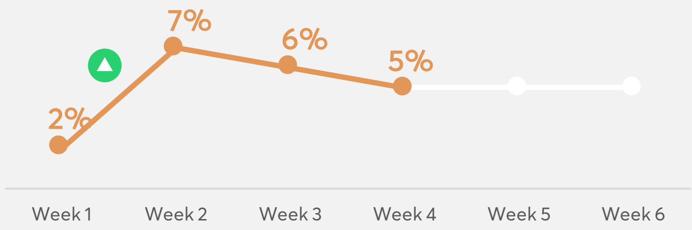
CATEGORY 03

TV

Median time spent watching TV each day*:

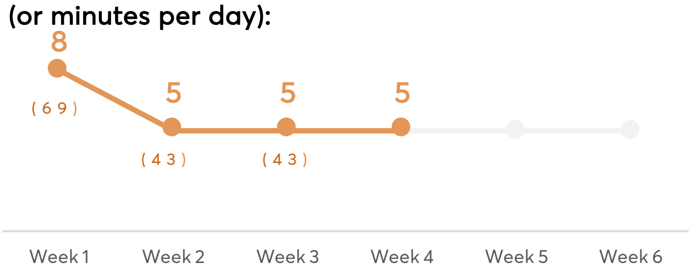
* Any format (online or offline)

Physical purchasing:

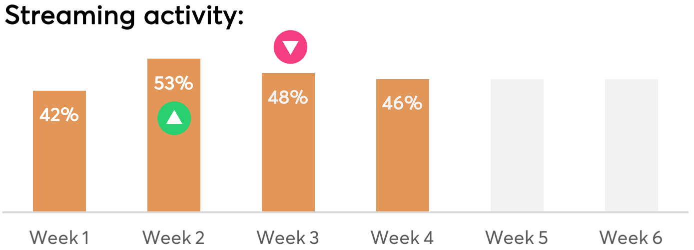


STREAMING

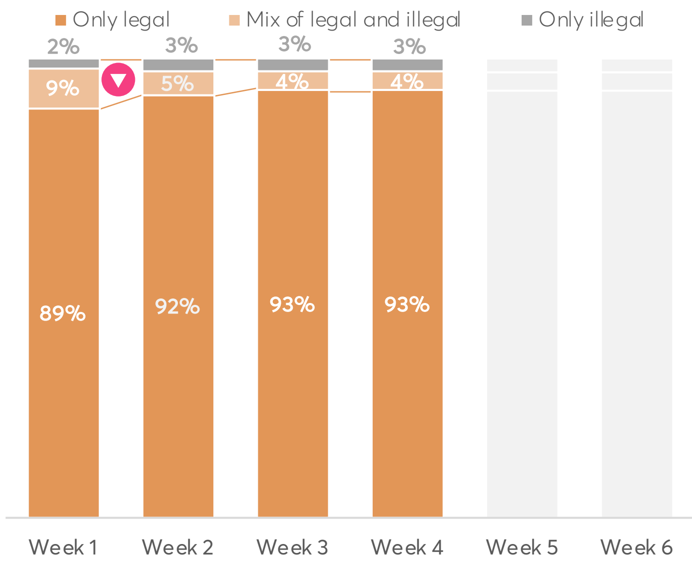
Median hours spent streaming in past week (or minutes per day):



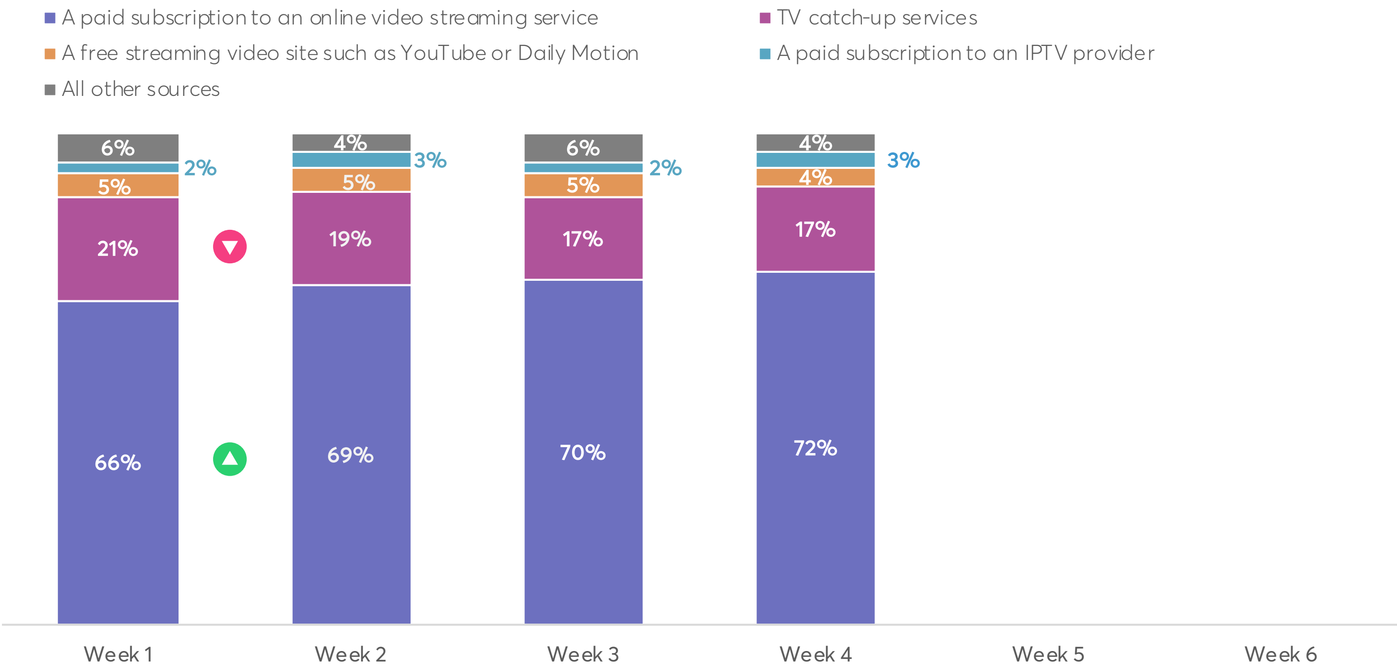
Streaming activity:



Streaming sources:



Share of streaming across sources



Base: Wave 4 – 'Streaming activity', 'Physical purchasing' (Total sample, n=2,132), 'Median time spent watching TV each day' (Downloaded, streamed, or purchased TV programmes/episodes in past week, n=1,082), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly TV streamers, n=997-1,004)

CATEGORY 04

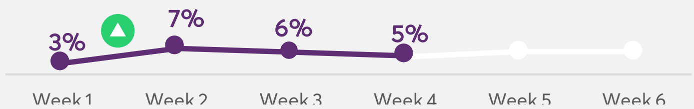
Video Games

Median time spent playing video games each day*:

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

* Any format (online or offline)

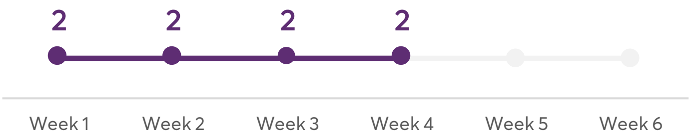
Physical purchasing:



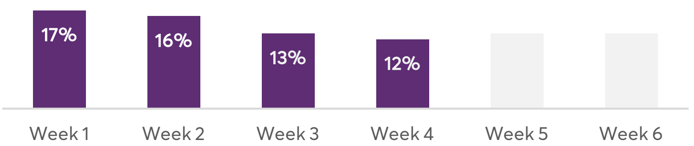
- Median hours spent playing video games remained at 3 hours per day.
- The proportion of respondents downloading/accessing video games remained around the same at 12%. The median number of games downloaded/accessed also remained unchanged at 2 per week.
- The proportion using partly or wholly illegal downloading sources decreased notably from 12% to 6%; the proportion using only illegal sources saw a small decrease to 2%, while the number using a mix of legal and illegal downloading sources decreased, by 5 percentage points, to 4%.
- For share of downloading/accessing across sources, "downloading video games for free" remained the dominant method at 50%.
- The number of respondents purchasing physical copies remained around the same (5%) as the previous week.

DOWNLOADING/ACCESSING

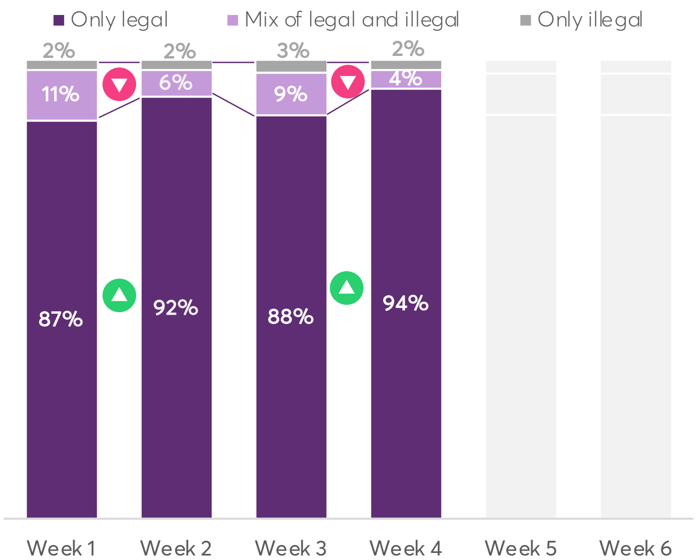
Median number downloaded/accessed in past week:



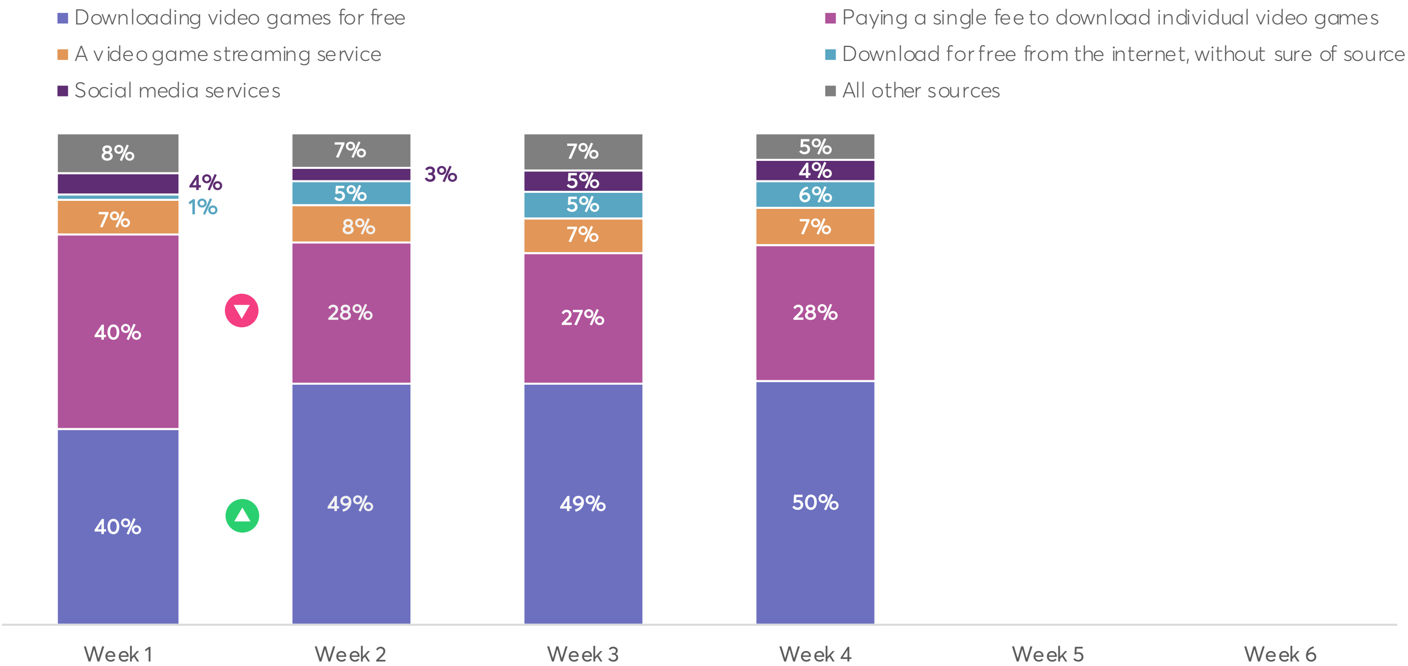
Downloading/accessing activity:



Downloading/accessing sources:



Share of downloading/accessing across sources



Base: Wave 4 – 'Downloading/accessing activity', 'Physical purchasing' (Total sample, n=2,132), 'Median time spent playing games each day' (Downloaded, streamed, or purchased video games in past week (n=279), 'Median hours spent downloading/accessing in past week', 'Streaming sources' and 'Share of downloading/accessing across sources' (Download/access video games weekly, n=230-245)

CATEGORY 05

E-publishing

- Median hours spent reading/listening remained at 2 hours per day for books and audiobooks and at 1 hour for magazines.
- Physical purchasing remained in line with the previous week for **audiobooks**, while **books and magazines** saw 2 percentage point declines, to 9% and 13% respectively.

E-BOOKS

- 12% had downloaded or accessed an **e-book,** which was a decrease of 2 percentage points from the previous week.
- For **e-books,** the proportion using partly or wholly illegal downloading sources decreased from 18% to 15%.
- There were no noteworthy changes in the share of downloading/accessing **e-books** across sources.

DIGITAL MAGAZINES

- 7% 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** increased from 20% to 27%. The number using only illegal sources increased notably by 10% to 22%.
- Looking at share of downloading/accessing **digital magazines** across sources, "pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online" fell by 6 percentage points to 25%.
- Using "a free website which hosts or links to digital magazines I would otherwise expect to pay for" increased by 5 percentage points to 16%, while "BitTorrent or another file-sharing or peer to peer service" notably increased from 1 to 5%.

AUDIOBOOKS

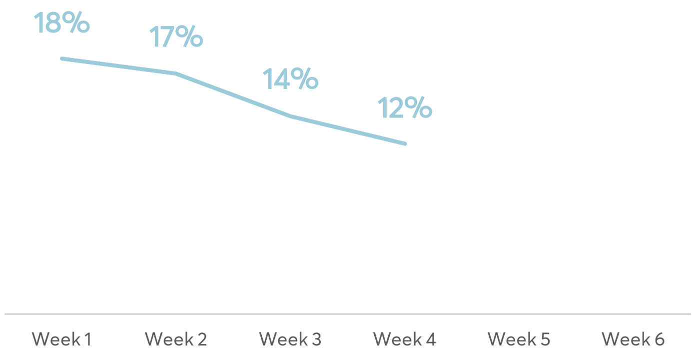
- 6% had downloaded or accessed an **audiobook**, which was unchanged from the previous week.
- For **audiobooks**, the proportion using partly or wholly illegal downloading sources decreased by 5 percentage points to 21%.
- There were no noteworthy changes in the share of downloading/accessing **audiobooks** across sources.

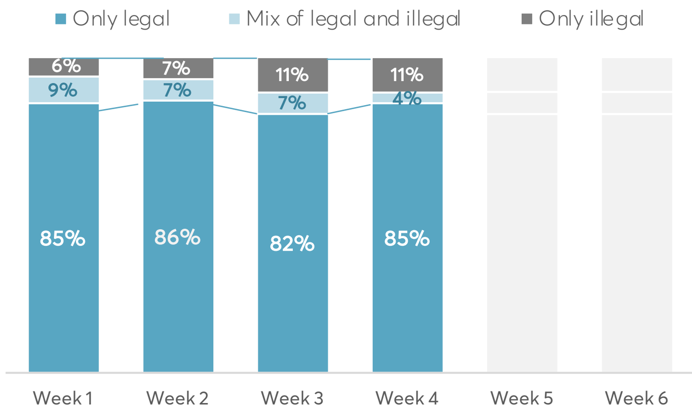
DOWNLOADING/ACCESSING

Downloading/accessing activity:

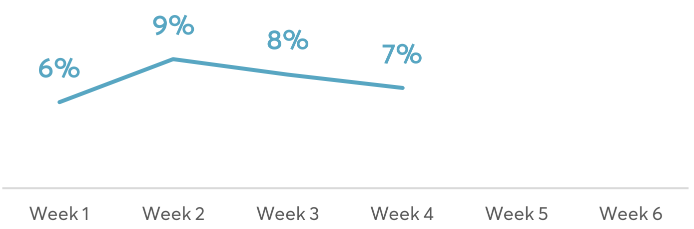
Downloading/accessing sources:

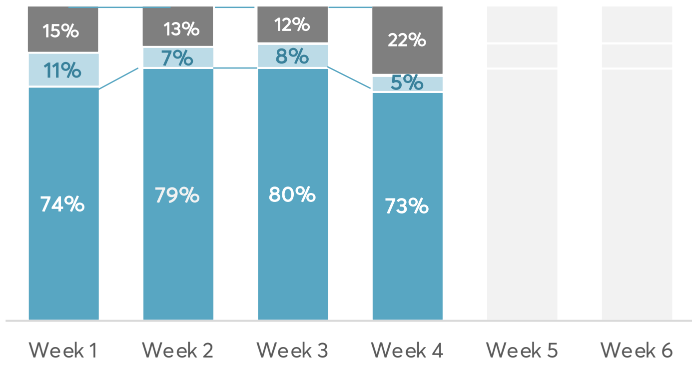
E-BOOKS



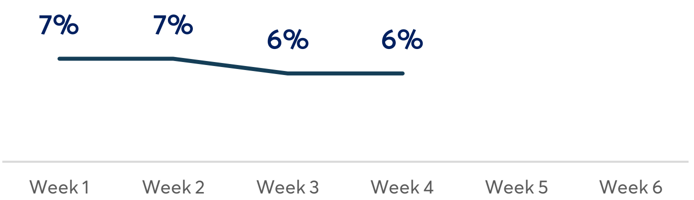


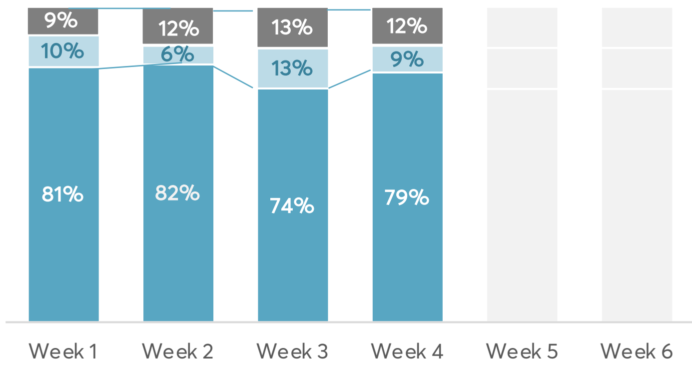
DIGITAL MAGAZINES





AUDIOBOOKS





Base: Wave 4 – 'Downloading/accessing activity', (Total sample, n=2,132), 'Downloading/accessing sources' (Weekly E-book consumers n=237, Weekly Digital magazine consumers n=129, Weekly Audiobook consumers n=104)

CATEGORY 05

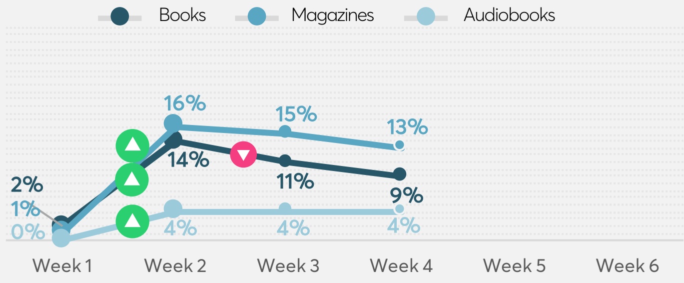
E-publishing

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	2 HRS		
Magazines						
	1 HRS	1 HRS	1 HRS	1 HRS		
Audiobooks						
	1 HRS	2 HRS	2 HRS	2 HRS		

* Any format (online or offline)

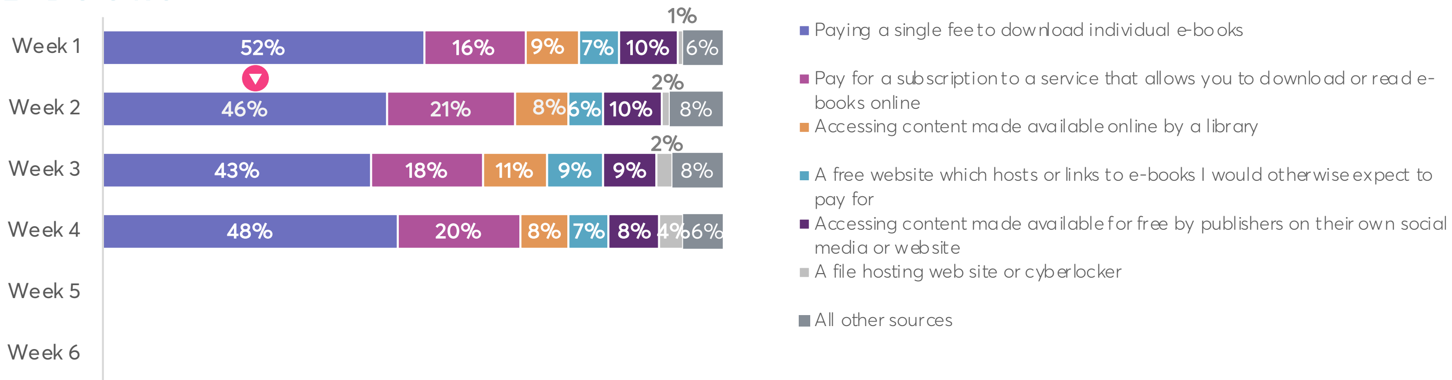
Physical purchasing:



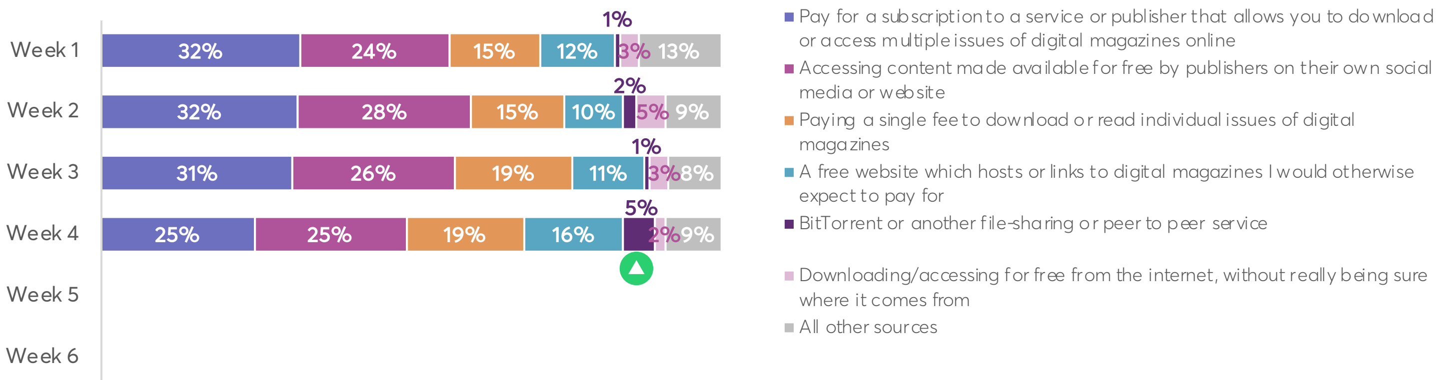
DOWNLOADING/ACCESSING

Share of downloading/accessing across sources

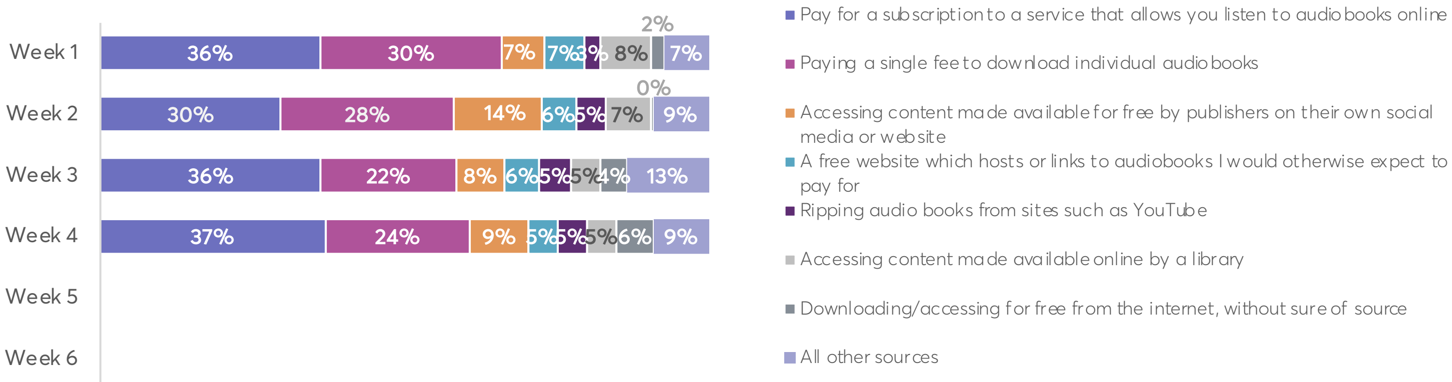
E-BOOKS



DIGITAL MAGAZINES



AUDIOBOOKS



Base: Wave 4 – 'Physical purchasing' (Total sample, n=2,132), 'Median time spent reading/listening each day' (Downloaded/accessed or purchased in past week – E-books n=374, Digital magazines n=344, Audiobooks n=133), 'Share of downloading/accessing across sources' (Weekly E-books consumers n=248, Weekly Digital magazine consumers n=143, Weekly Audiobooks consumers n=116)

Other content consumption

Watching or reading news continues to be the dominant activity (91% weekly, 76% daily).

The only significant change week on week across all the other content categories for week 4 was a decline in the total weekly level of those "watching live social media streams/ broadcasts…".

However, looking across the weeks to date, we see trends emerging. Some categories have shown a downward trend overall in total weekly consumption. For others, while total weekly consumption has remained consistent, the frequency of engaging with them each week has reduced from daily to less than daily.

Decline in total weekly consumption:

"Watch live social media streams/broadcasts…"

"Look at art, paintings online…"

"Online learning such as watch free to access videos…"

"Play online multiplayer video games…"

Reduced frequency (less than daily):

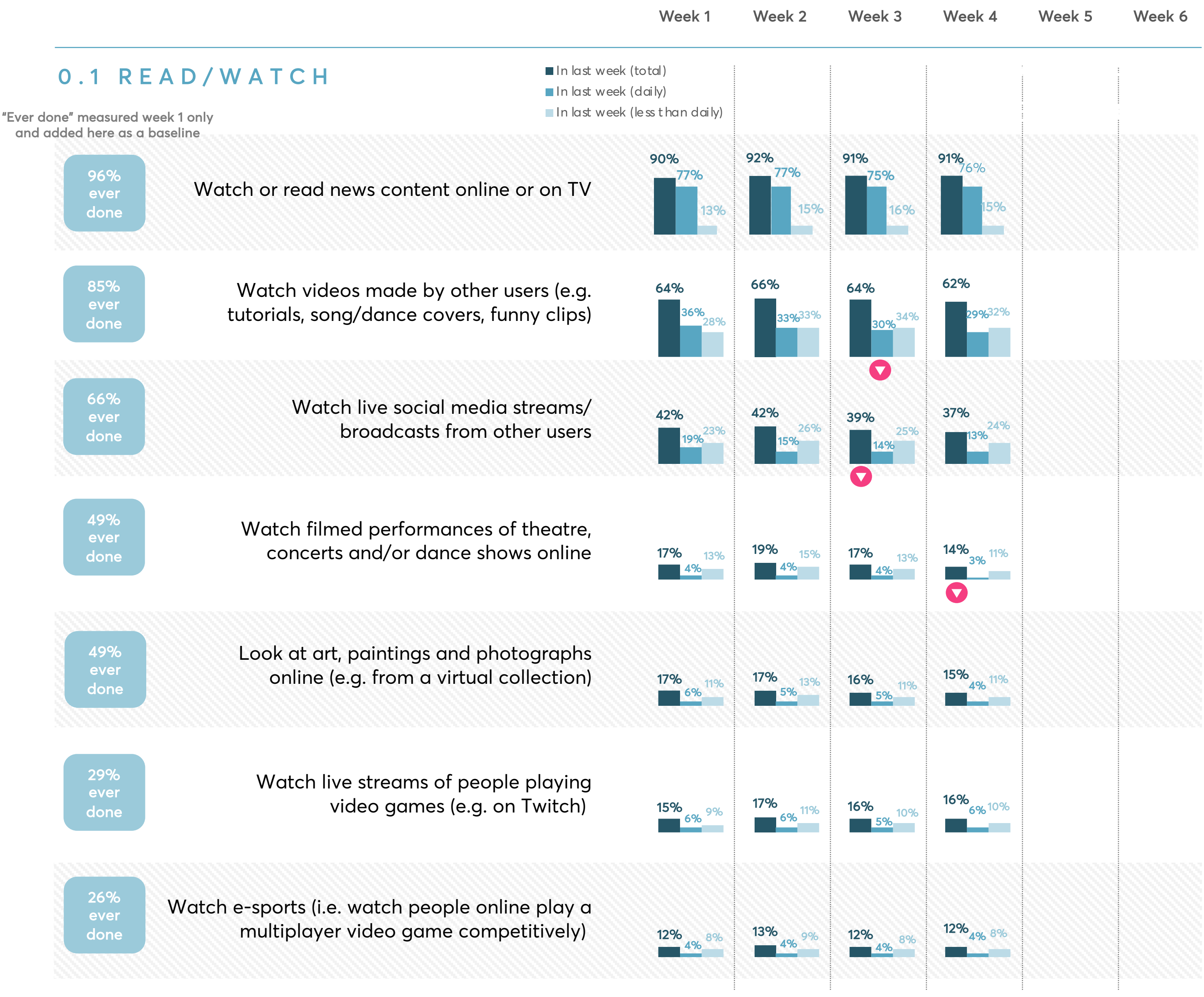
"Watch videos made by other users…"

"Look at, comment on, or 'like' social media posts…"

"Use video software for social activities…"

"Look at, comment on, or 'like' social media… by celebrities"

"Sharing images or videos online… not created by you"



Other content consumption

0.2 INTERACT WORK/SOCIAL

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

Activity	Ever done	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Look at, comment on, or 'like' social media posts from other users	82% ever done	71% / 51% / 20%	73% / 49% / 24%	70% / 47% / 24%	70% / 44% / 25%		
Use video software for social activities with friends/family	68% ever done	51% / 19% / 33%	54% / 17% / 36%	53% / 16% / 38%	52% / 14% / 37%		
Look at, comment on, or 'like' social media content posted by celebrities	57% ever done	39% / 23% / 16%	40% / 21% / 19%	36% / 20% / 16%	38% / 20% / 18%		
Conduct work meetings via video software	38% ever done	26% / 10% / 15%	27% / 10% / 16%	28% / 11% / 17%	27% / 11% / 17%		

0.3 ACTIVELY PARTICIPATE

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

Activity	Ever done	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Online learning such as watch free to access videos (e.g. YouTube Tutorials) or enrolling on courses	61% ever done	32% / 12% / 19%	30% / 12% / 18%	30% / 12% / 18%	29% / 10% / 19%		
Play online multiplayer video games (e.g. Minecraft, Fortnite) on any device inc. smartphones	37% ever done	24% / 12% / 12%	23% / 11% / 13%	21% / 10% / 10%	20% / 10% / 10%		
Take part in online fitness classes (e.g. on Instagram Live, YouTube Live or Zoom)	36% ever done	22% / 8% / 13%	22% / 8% / 13%	21% / 7% / 13%	20% / 7% / 13%		

0.4 CREATE/SHARE

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

Activity	Ever done	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Sharing images or videos online that are not created by you	63% ever done	36% / 14% / 21%	38% / 12% / 26%	36% / 12% / 24%	35% / 11% / 24%		
Create and post your own videos/written/audio content online (e.g. on Instagram, YouTube, TikTok)	50% ever done	24% / 8% / 16%	26% / 7% / 19%	24% / 7% / 17%	26% / 8% / 18%		
Make content you own (e.g. music, films/shows, books) publicly available by uploading files or links online	29% ever done	12% / 4% / 7%	12% / 4% / 8%	12% / 5% / 7%	12% / 4% / 8%		

Digital Culture - Consumer Tracking Study

WAVE 4 OF 6 | MAY 2020

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