Creative Industries
Policy & Evidence Centre
Led by **nesta**

Digital Culture

Consumer Tracking Study

WAVE 5 OF 6 | MAY 2020

Intellectual
Property
Office

AUDIENCE NET

Methodology and Sample

See Wave 1 report for the detailed overall methodology.

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 4 and week 5.

Note: as the weeks progress and the base sizes become smaller, the statistical margin of error increases. This is especially noticeable for some categories.

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	11th -15th May	
N=	3,863	2,792	2,369	2,132	1,947	

*Key:

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

Overview (1 of 2)

Time spent consuming content (daily)

After four weeks of relative stability for most categories in terms of the median amount of time spent consuming content per day, online or offline, this week saw some notable reductions. Levels of overall time spent consuming per day fell for music, film, TV and magazines in week 5, taking them to the lowest levels recorded in the study.

Despite falling to its lowest level, TV continued to have the highest median time across categories. Video games, which was one of the categories that remained stable in week 5, was only marginally behind TV in terms of median time spent on consumption. Books and audiobooks also remained stable in week 5.

Levels of downloading, streaming, accessing

Looking specifically at ways of accessing content, most categories remained stable or saw a continuation in a downwards trend in relation to the proportion of respondents downloading, streaming or accessing them online.

For most of the categories experiencing a decrease, this was only marginal compared to week 4. However the proportion streaming films fell significantly, to its lowest level.

Music, which has been quite volatile (up or down) across the weeks in terms of the proportion streaming or downloading had quite a stable week, with figures in-line with week 4.

There has been a steady decline in the proportion accessing/downloading e-books and the difference between week 5 and week 1 is significant.

The median number or hours spent streaming in the past week remained stable for music and film (3 and 4 hours), a trend that has been consistent since week 2. TV, while still lower than its peak in week 1 (8 hours), saw an increase for the first time since week 2, rising from 5 to 6 hours.

For the number of downloads over the past week, music and film also remained stable and generally consistent with weeks 2 onwards. TV, which has seen marginal fluctuation over the weeks, went down from 4 to 3 downloads in week 5.

Physical purchasing

For most categories, after a peak in two, there has been a steady decline in the proportion purchasing physical products. This week, for these categories, proportions either remained stable or decreased slightly. Although not a significant increase, books bucked the trend with a marginal increase in week 5, up by 1 percentage point to 10%.

Overview (2 of 2)

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 - where downloading or streaming is measured separately - there were no significant changes week on week. When looking across the weeks, however, levels of illegal downloading or streaming have declined notably for film and TV, whilst for music there has been relatively little change – except for a slight dip in weeks 2 and 3 for music downloading.

Looking at the total use of illegal methods for accessing/downloading video games, the proportion, after a significant decline in week 4, went back up by 3 percentage points in week 5.

There were no significant changes in the total use of illegal methods for accessing/ downloading e-books and audiobooks. However, for digital magazines there was a significant decrease of 11 percentage points in week 5 – to the lowest level seen in the study by some margin.

Other content categories

The trend reported last week – a decline in total weekly engagement for some activities and reduced frequency for others (where the total weekly level was stable) – continued for some categories in week 5. The activities continuing a decrease in total weekly engagement are:

- watching live social media streams/broadcasts;
- looking at art, paintings online;
- online learning such as watch free to access videos.

Those activities which continued to see a shift from daily to less than daily engagement are:

- watching videos made by other users;
- looking at, commenting on, or ‘liking’ social media posts;
- using video software for social activities;
- sharing images or videos online… not created by themselves.

Two of the categories reported to have downward trends last week have stopped/reversed the trend in week 5:

- online multiplayer games has stabilised for total weekly consumption;
- look at, comment on, or ‘like’ social media posts… has reversed its downward trend in daily consumption.

Wellbeing and lifestyle measures

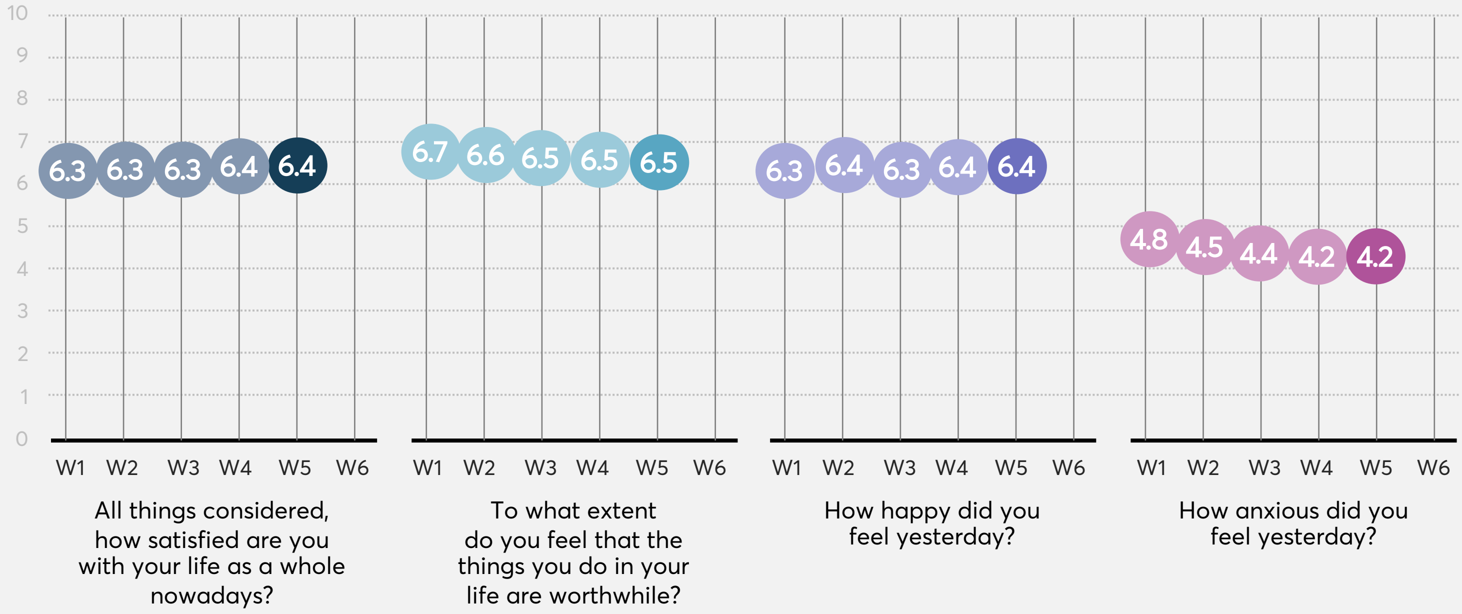
There was no change in wellbeing measures between weeks 4 and 5.

While levels of “anxiety” remained at their lowest point in the study, the trend of decreasing week-on-week was not present in week 5.

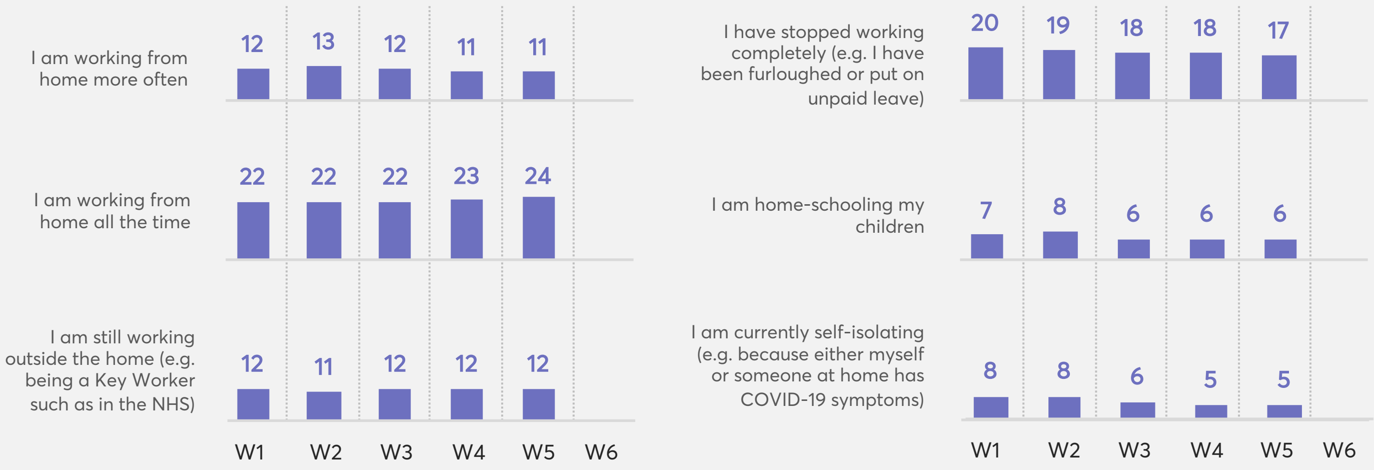
Wellbeing and Lifestyle

- There was no change in wellbeing measures from week 4 to week 5.
- Level of anxiety ("how anxious did you feel yesterday?"), and the extent to which respondents feel that the things they do in life "are worthwhile", remained significantly lower compared to week 1.
- Changes to work/lifestyle owing to COVID-19 measures were consistent with those reported in week 4, however, all are significantly lower than week 1 – except for those still working outside the home (e.g. keyworkers).

Wellbeing | Average (0 - 10)



Changes in work/lifestyle due to COVID-19



Base: Wave 5 - Total sample (n=1,947)

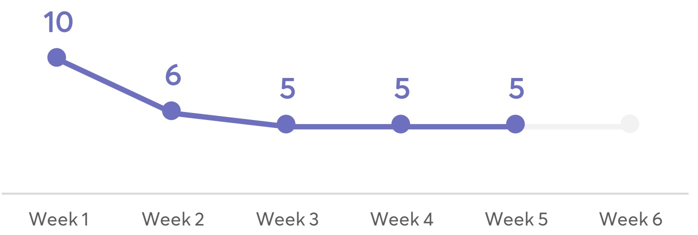
CATEGORY 01

Music

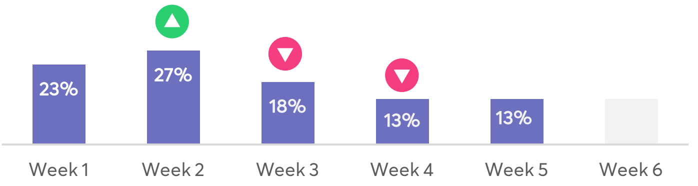
- Median hours spent listening to music dropped by a further 15 minutes in week 5 to 2 hours 30 minutes.
- In week 5, there was no change in the proportion downloading music (13%) or the median number of downloads (5).
- The proportion using partly or wholly illegal downloading sources remained unchanged (31%).
- Looking at share of downloading sources, "Saving offline via a paid subscription service" remained the dominant method of downloading, recovering some share (3 percentage points) after a notable decline the previous week.
- The proportion of respondents streaming music showed no change in week 5 (45%) compared to week 4.
- The median number of hours spent streaming per week remained static at 3.
- Legal streaming sources continue to dominate with 99% share in week 5 - virtually unchanged since week 1.
- Share of streaming across sources remained relatively stable, and "paid for subscription service" maintained the highest share (48%).
- There was no change in the proportion who had made a physical purchase in week 5 (5%).

DOWNLOADING

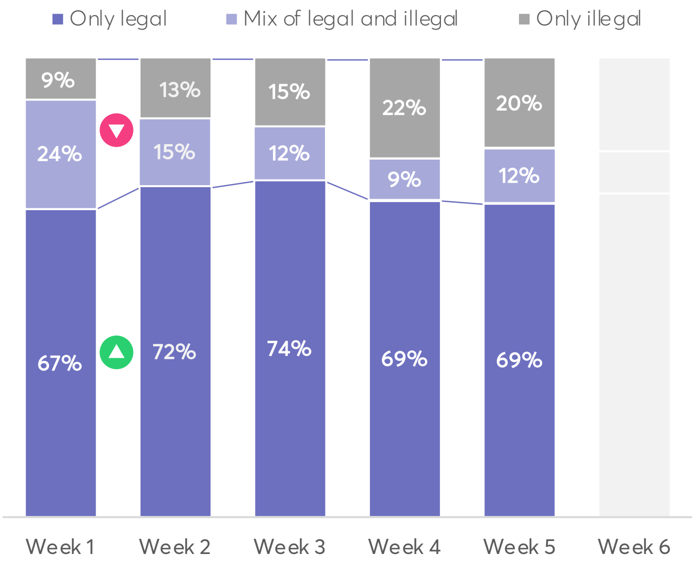
Median number of downloads in past week:



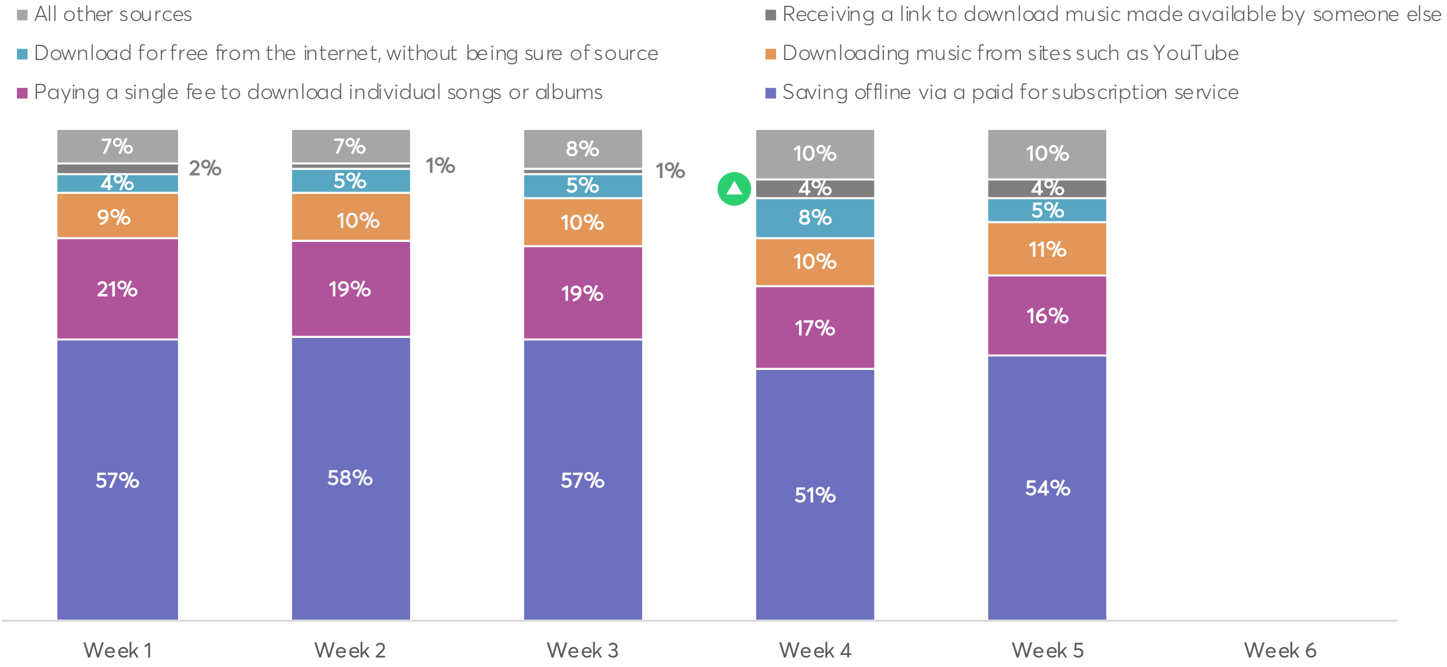
Downloading activity:



Downloading sources:



Share of downloading across sources:

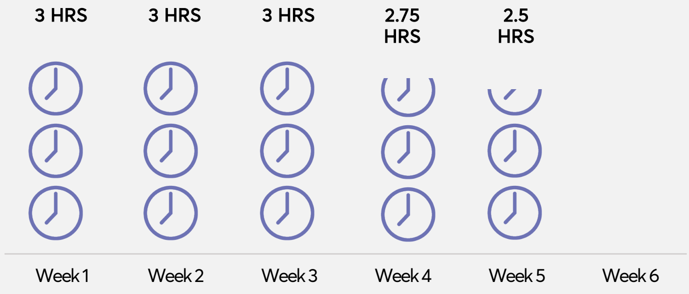


Base: Wave 5 – 'Downloading activity' (Total sample, n=1,947), 'Median number of downloads in past week', 'Downloading sources' and 'Share of downloading across sources' (Weekly music downloaders, n=222-236)

CATEGORY 01

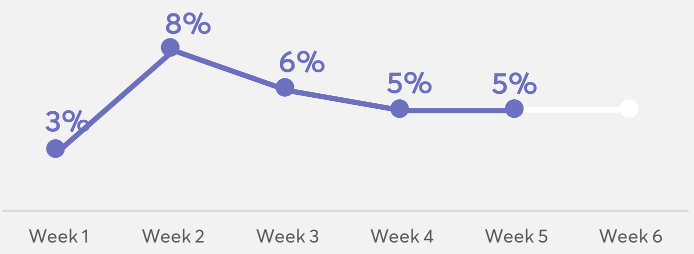
Music

Median time spent listening to music each day*:



* Any format (online or offline)

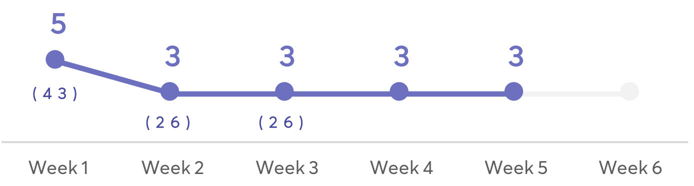
Physical purchasing:



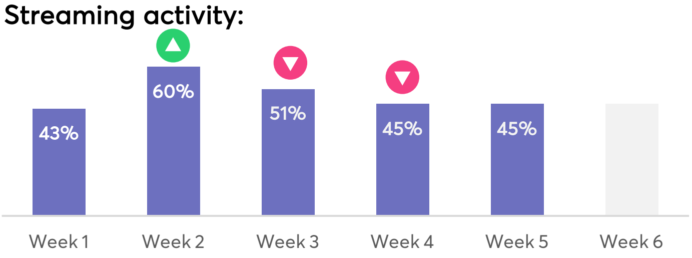
STREAMING

Median hours spent streaming in past week

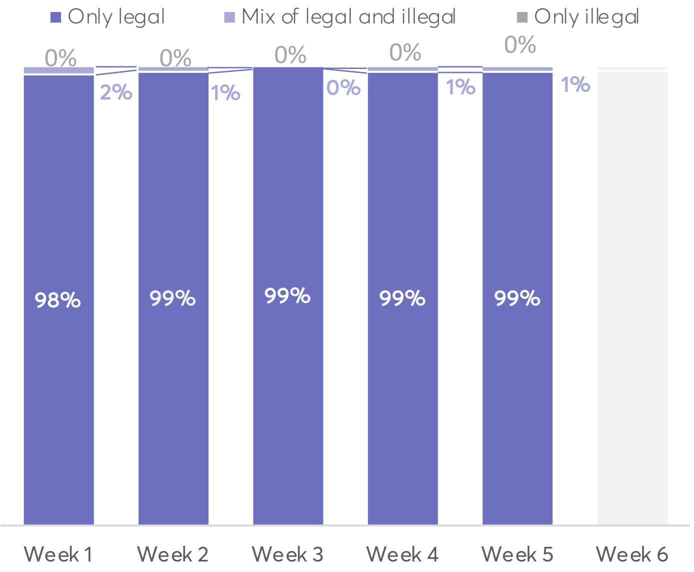
(or minutes per day):



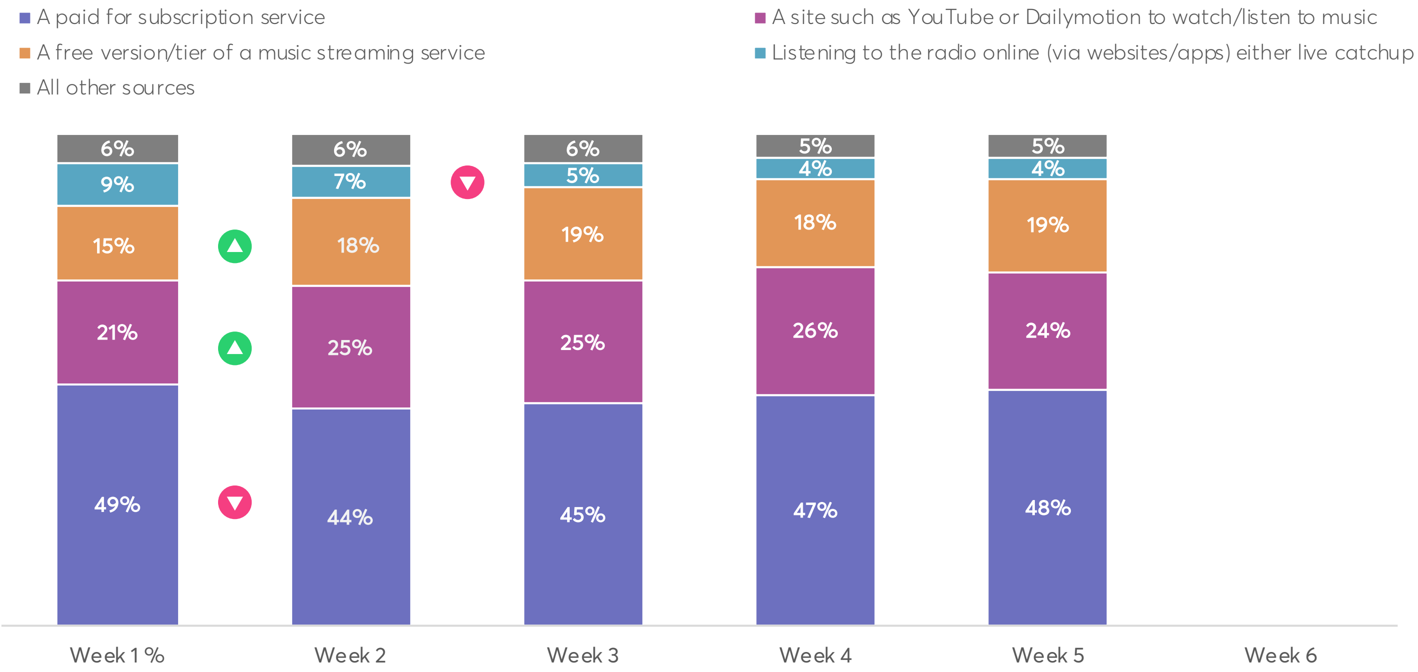
Streaming activity:



Streaming sources:



Share of streaming across sources:



Base: Wave 5 – 'Streaming activity', 'Physical purchasing' (Total sample, n=1,947), 'Median time spent listening to music each day' (Downloaded, streamed, or purchased music in past week, n=920), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly music streamers, n=852-864)

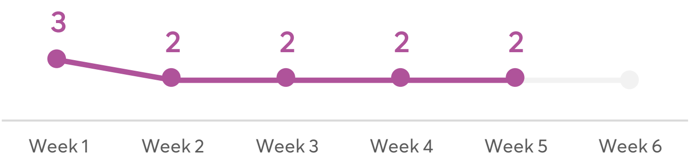
CATEGORY 02

Film

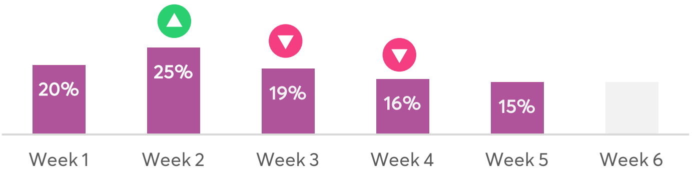
- Median hours spent watching films fell notably by 30 minutes to 2.5 hours per day.
- The proportion downloading films decreased marginally to 15% (5 percentage points lower than week 1), while the median number of downloads remained at 2.
- The proportion using partly or wholly illegal downloading sources fell by 1 percentage point to 13% - significantly lower than the week 1 level.
- “Saving offline via a paid for subscription service” remained the dominant method of downloading film, and there was a marginal increase in share by 2 percentage points (to 64%).
- The proportion streaming films fell significantly by 4 percentage points to 43% - 3 points below week 1 level.
- Median hours spent streaming films remained unchanged at 4 hours per week.
- The proportion using partly or wholly illegal streaming sources remained stable (7%) - significantly lower than the week 1 level.
- The dominant method of streaming music - “paid subscription service to an online video streaming service” - remained relatively unchanged (81%). However, after declines seen in the previous two weeks, “TV catch-up services”, increased significantly by 3 percentage points to 8%.
- There was a further 2 percentage point (significant) decrease in the proportion of those who had made a physical purchase (down to 6%).

DOWNLOADING

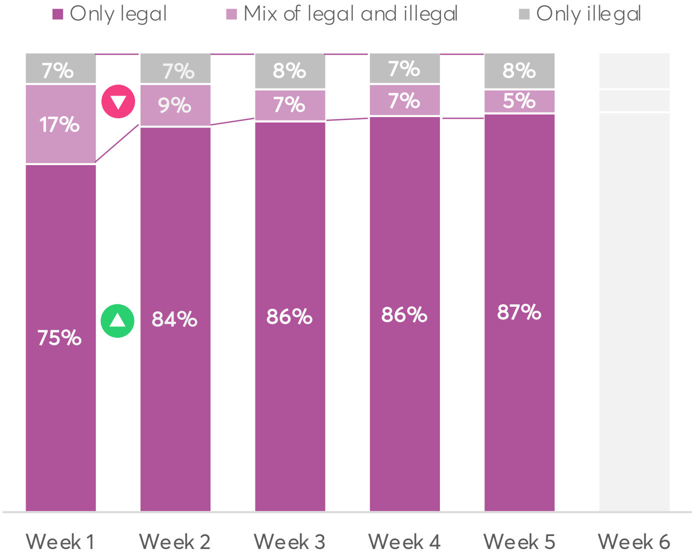
Median number of downloads in past week:



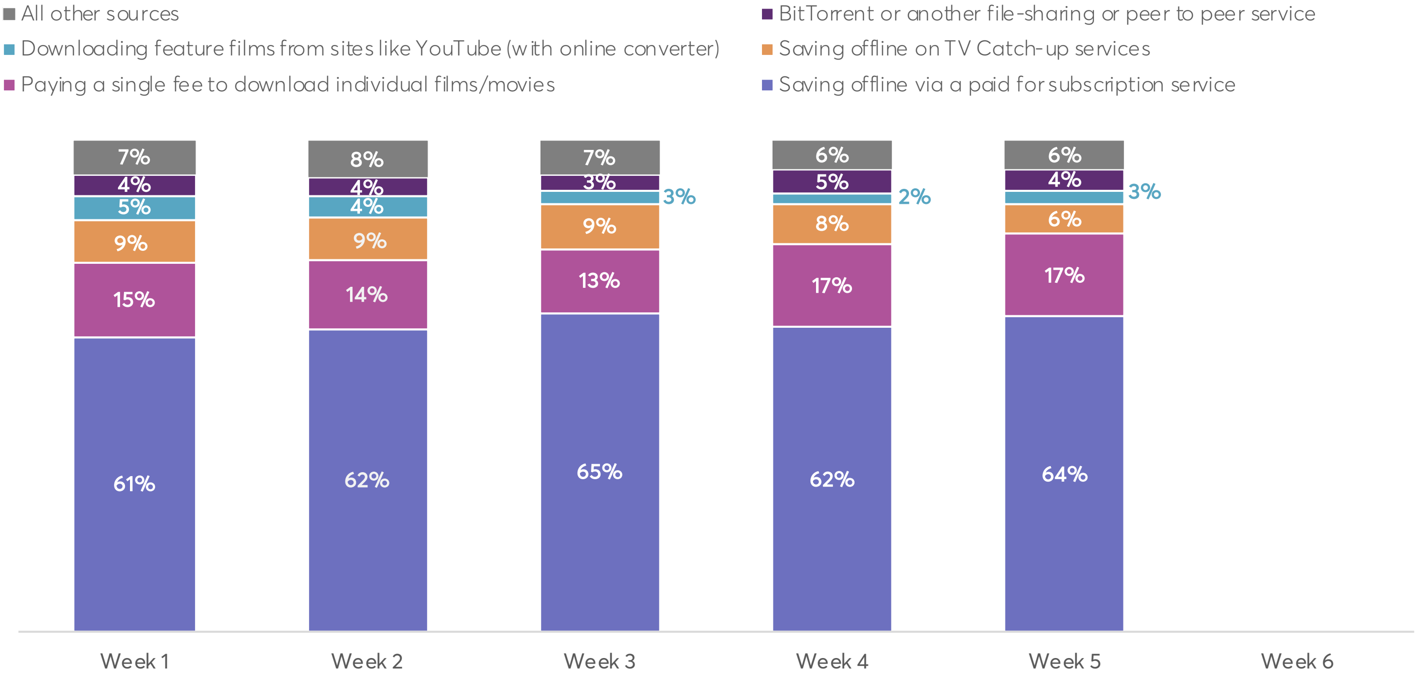
Downloading activity:



Downloading sources:



Share of downloading across sources:



Base: Wave 5 – ‘Downloading activity’ (Total sample, n=1,947), ‘Median number of downloads in past week’, ‘Downloading sources’ and ‘Share of downloading across sources’ (Weekly film downloaders, n=287-293)

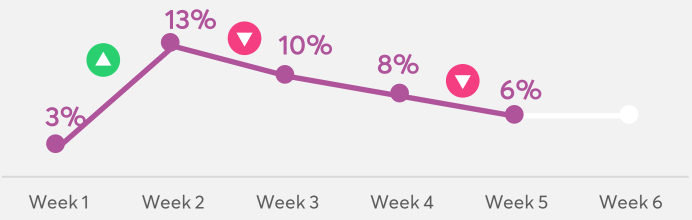
CATEGORY 02

Film

Median time spent watching films each day*:

* Any format (online or offline)

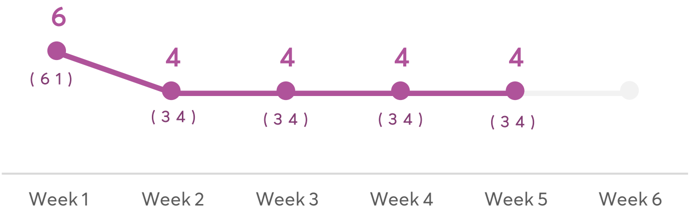
Physical purchasing:



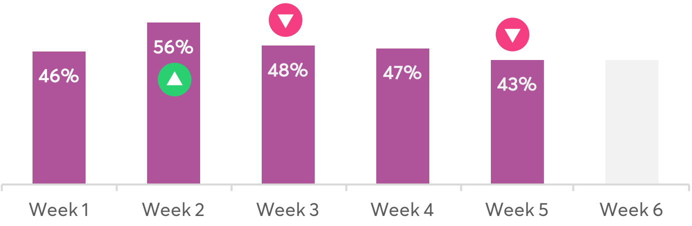
STREAMING

Median hours spent streaming in past week

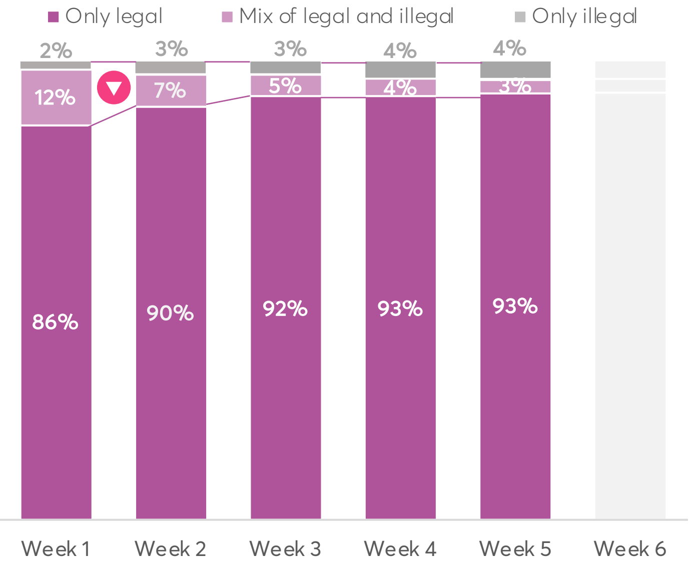
(or minutes per day):



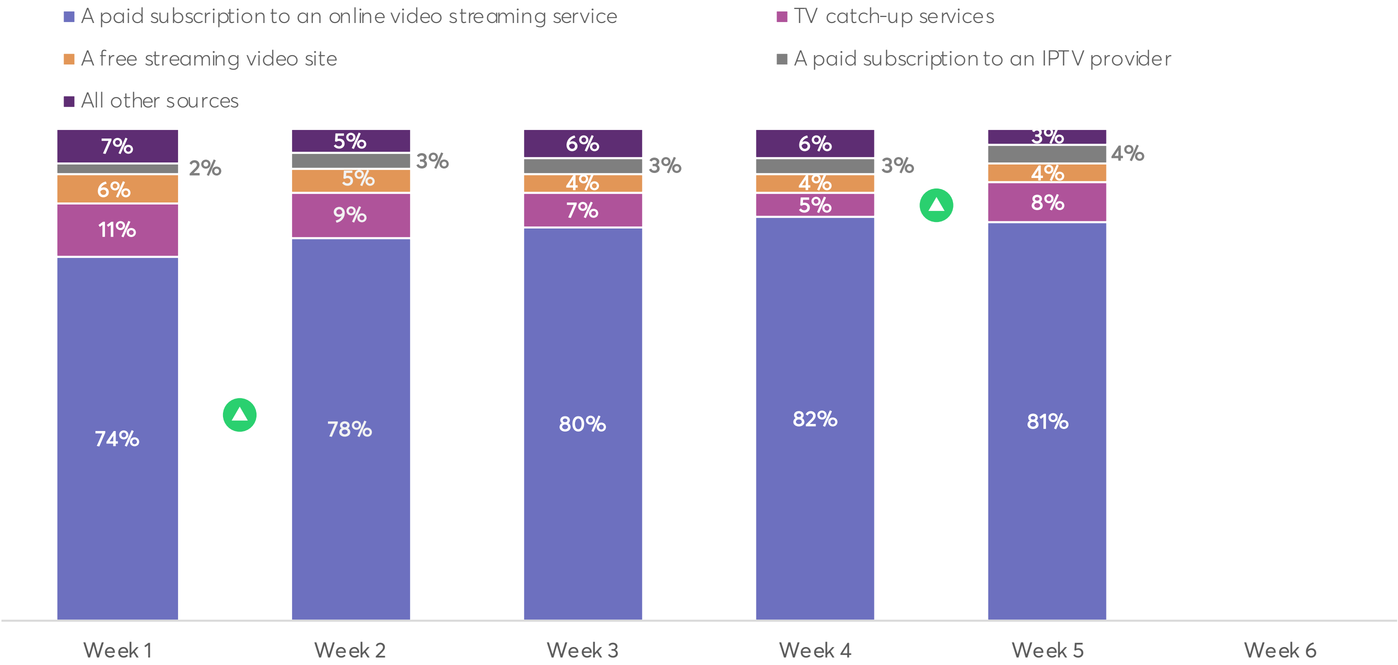
Streaming activity:



Streaming sources:



Share of streaming across sources



Base: Wave 5 – 'Streaming activity', 'Physical purchasing' (Total sample, n=1,947), 'Median time spent watching films each day' (Downloaded, streamed, or purchased films in past week, n=954), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly film streamers, n=864-870)

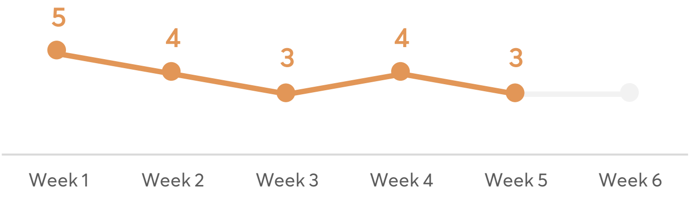
CATEGORY 03

TV

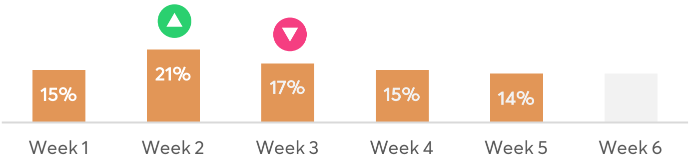
- Median hours spent watching TV fell to its lowest level yet – down to 3.1 hours per day.
- The proportion downloading TV shows decreased by just 1 percentage point to 14%, while the median number of downloads dropped back down from 4 to 3.
- The proportion using partly or wholly illegal downloading sources remained at 12% for the 3rd week running – significantly lower than week 1.
- For share of downloading across sources, “saving offline on a paid for subscription service” remained the dominant method of downloading with 56%. “TV catch-up services” gained 3 percentage points, taking it to just above the week 1 level (26%).
- The proportion of respondents streaming TV decreased by just 1 point to 45%. The median number of hours spent streaming per week increased to 6.
- The proportion using partly or wholly illegal streaming sources fell by just 1 percentage point in week 5 to 6%, however it is now at a level significantly lower than week 1.
- A “paid subscription to an online video streaming service ” is the dominant method for TV streaming and has continued to gain share in week 5 (up 2 percentage points to 74%). “TV catch-up services”, on the other hand, continued to lose share (down 1 percentage point to 16%). Although these are small changes week on week - both are significant changes from week 1.
- There was a 1 percentage point drop in the proportion of those who had made a physical purchase (to 4%).

DOWNLOADING

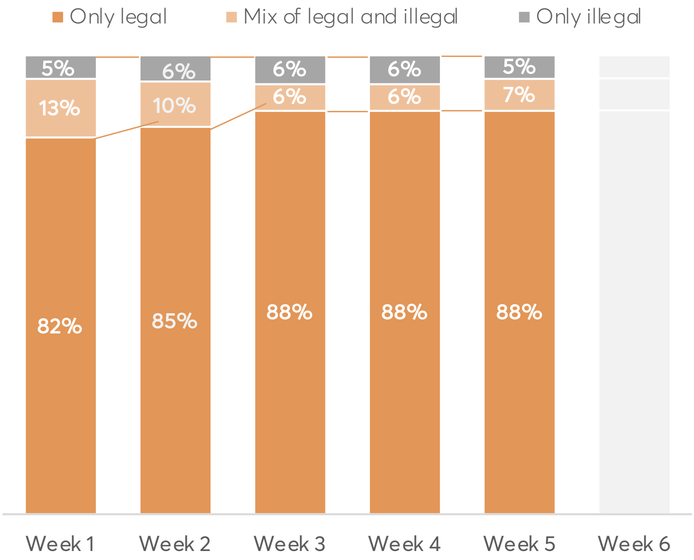
Median number of downloads in past week:



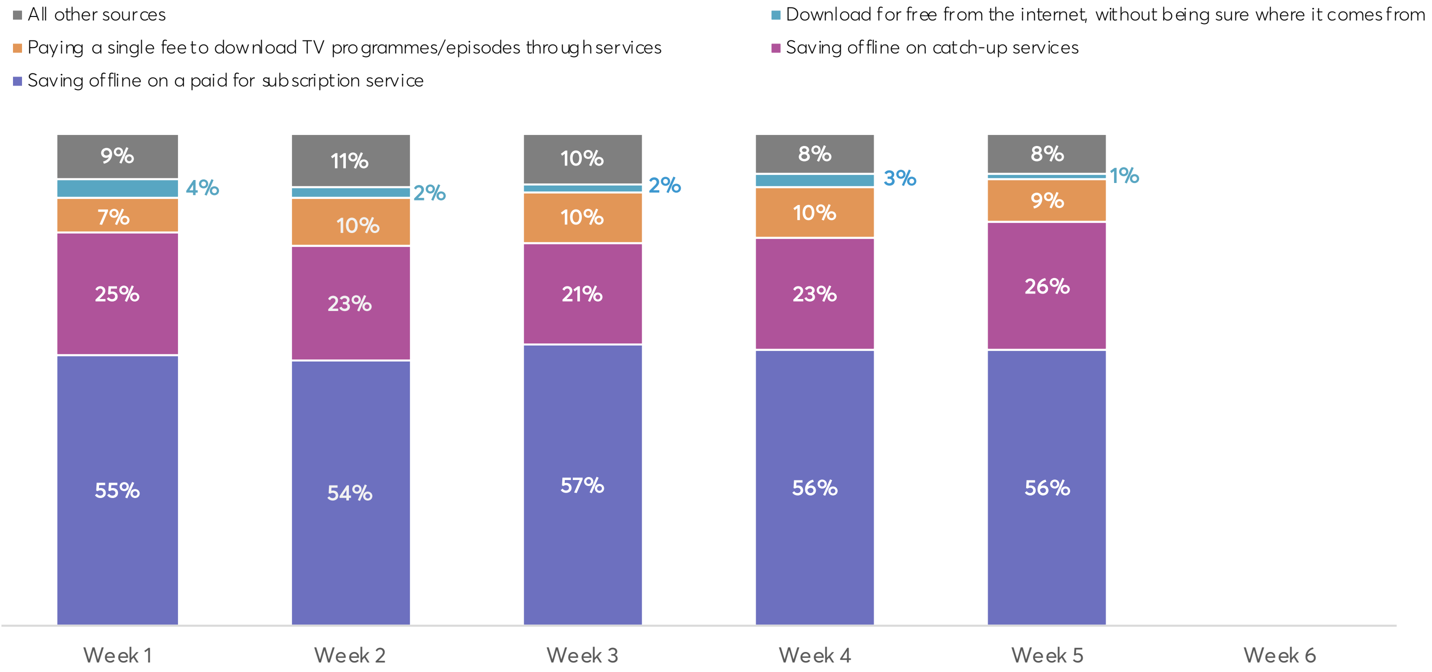
Downloading activity:



Downloading sources:



Share of downloading across sources



Base: Wave 5 – ‘Downloading activity’ (Total sample, n=1,947), ‘Median number of downloads in past week’, ‘Downloading sources’ and ‘Share of downloading across sources’ (Weekly TV downloaders, n=236-270)

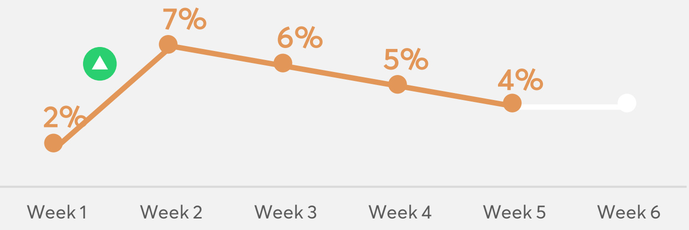
CATEGORY 03

TV

Median time spent watching TV each day*:

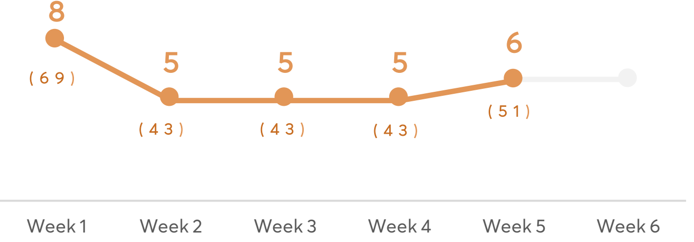
* Any format (online or offline)

Physical purchasing:

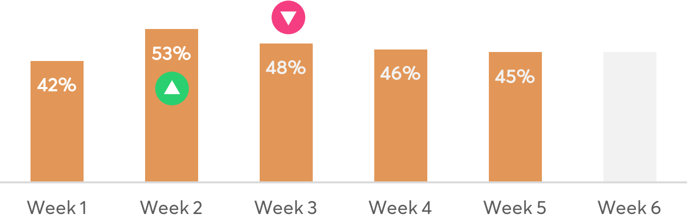


STREAMING

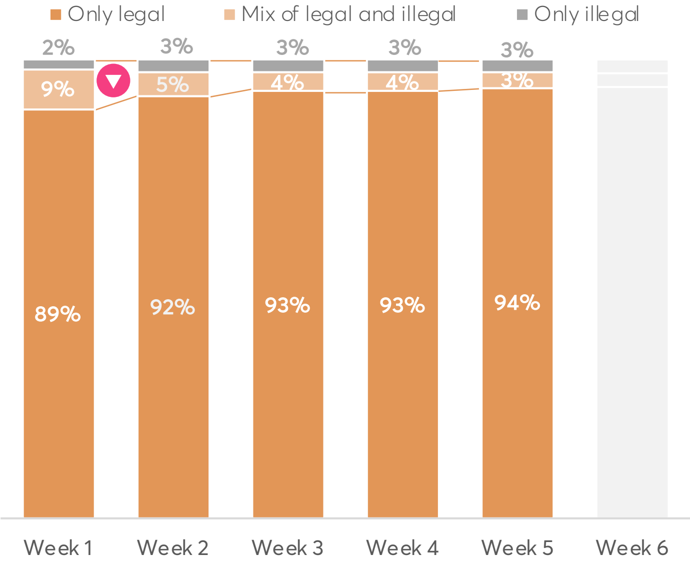
Median hours spent streaming in past week (or minutes per day):



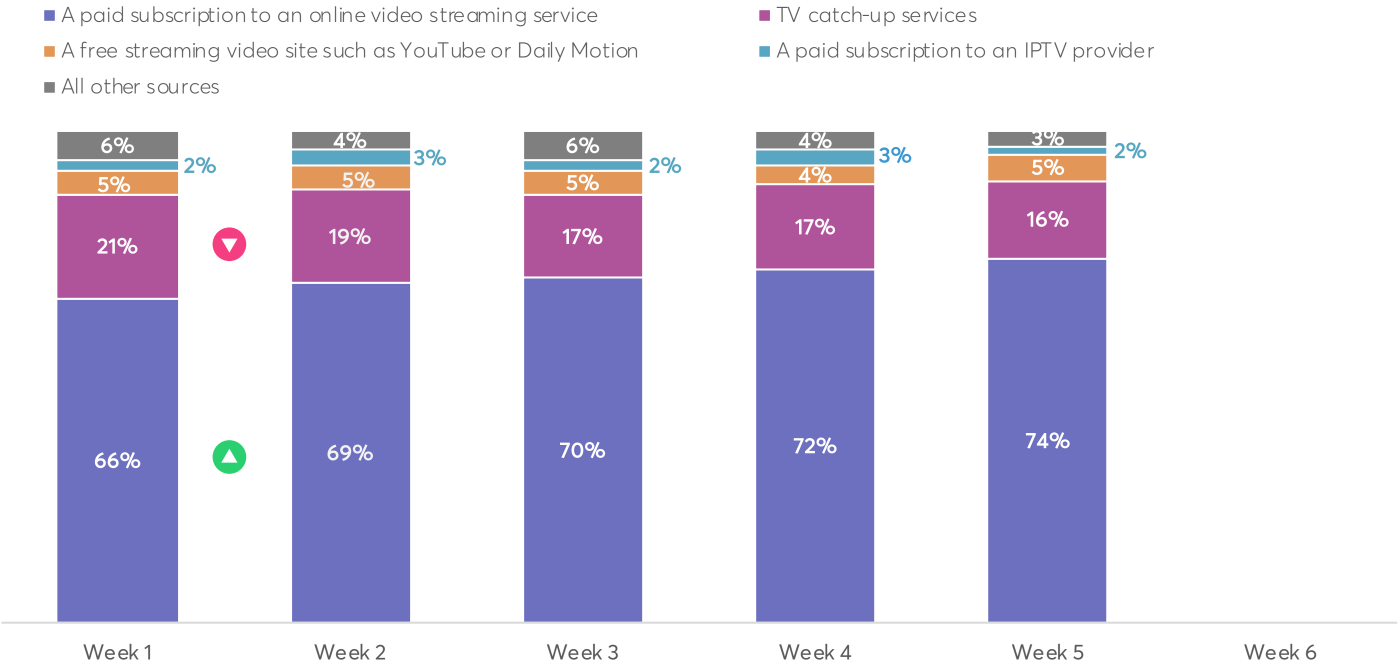
Streaming activity:



Streaming sources:



Share of streaming across sources



Base: Wave 5 – 'Streaming activity', 'Physical purchasing' (Total sample, n=1,947), 'Median time spent watching TV each day' (Downloaded, streamed, or purchased TV programmes/episodes in past week, n=964), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly TV streamers, n=895-902)

CATEGORY 04

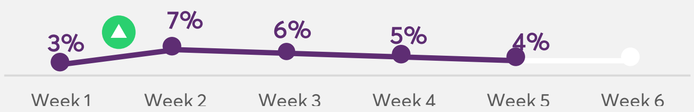
Video Games

Median time spent playing video games each day*:

3 HRS	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)

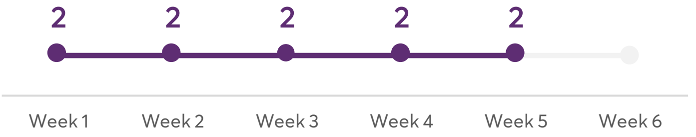
Physical purchasing:



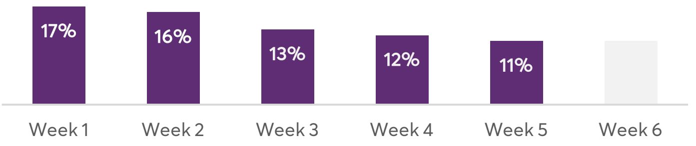
- Median hours spent playing video games remained at 3 hours per day.
- The proportion of respondents downloading/accessing video games continued the downward trend into week 5 (to 11%). The median number of games downloaded/accessed remained at 2 per week.
- The proportion using partly or wholly illegal downloading/accessing sources increased by 3 percentage points in week 5 to 9%.
- "Downloading video games for free" remained the dominant method of downloading/accessing video games – up 1 point on week 4 to 51%. "Paying a single fee to download individual video games" dropped by a notable 7 percentage points to 21% - almost half of the week 1 level.
- The proportion of respondents purchasing physical copies dropped 1 percentage point to 4% in week 5.

DOWNLOADING/ACCESSING

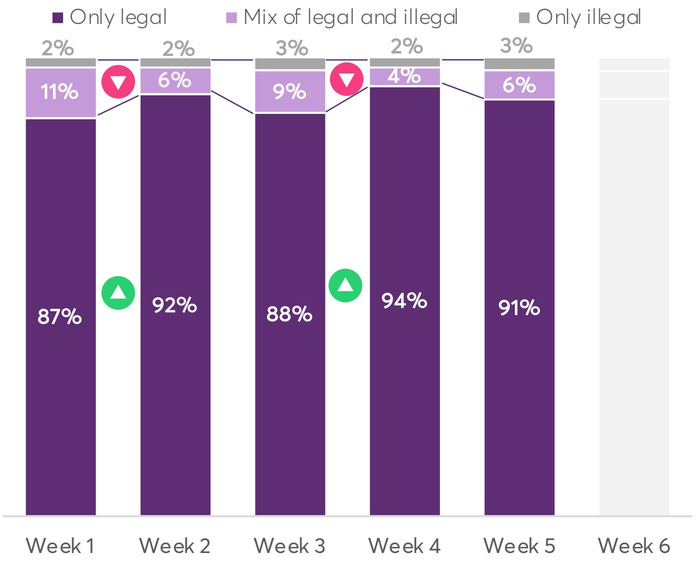
Median number downloaded/accessed in past week:



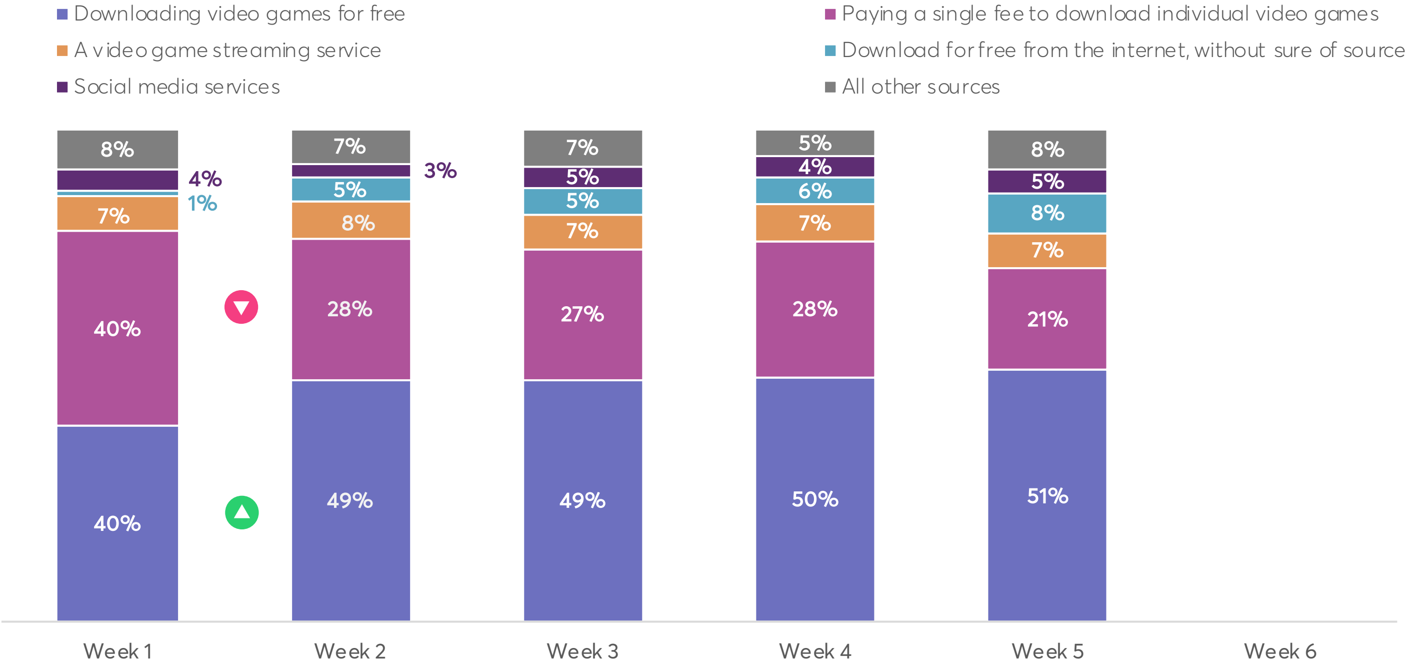
Downloading/accessing activity:



Downloading/accessing sources:



Share of downloading/accessing across sources



Base: Wave 5 – 'Downloading/accessing activity', 'Physical purchasing' (Total sample, n=1,947), 'Median time spent playing games each day' (Downloaded, streamed, or purchased video games in past week (n=232), 'Median hours spent downloading/accessing in past week', 'Streaming sources' and 'Share of downloading/accessing across sources' (Download/access video games weekly, n=191-209)

CATEGORY 05

E-publishing

- Median hours spent reading/listening remained at 2 hours per day for books and audiobooks. However, for magazines the medium time fell from 1 hour to 40 minutes.
- Physical purchasing remained broadly in line with the previous week (within 1 percentage point) for books (10%), magazines (13%) and audiobooks (3%).

E-BOOKS

- 11% had downloaded or accessed an e-book in week 5 – down 1 percentage point on week 4 and continuing a notable downward trend.
- The proportion using partly or wholly illegal downloading/accessing sources fell by a third to 10%.
- There were no noteworthy changes in the share of downloading/accessing e-books across sources.

DIGITAL MAGAZINES

- 6% had downloaded or accessed a digital magazine, which was the 3rd weekly decline in a row.
- The proportion using partly or wholly illegal sources for downloading or accessing digital magazines declined significantly from 27% to 13%.
- Looking at share of downloading/accessing **digital magazines** across sources, using a paid "subscription to a service or publisher…" increased significantly to 37%. Use of a "free website which hosts or links to digital magazines I would otherwise expect to pay for" fell significantly to 5% - a reversal of the previous week's increase.

AUDIOBOOKS

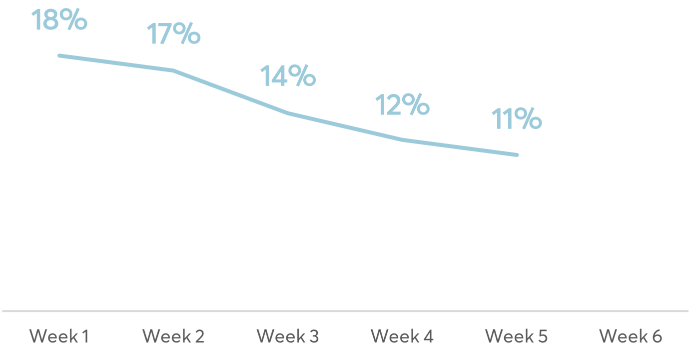
- 5% had downloaded or accessed an audiobook in week 5, down just 1 percentage point on the previous week.
- The proportion using partly or wholly illegal downloading or accessing sources decreased notably by 10 percentage points to 11%.
- Looking at share of downloading/accessing audiobooks across sources, paying for "a subscription to a service that allows you listen to audiobooks online" increased notably to 46%.

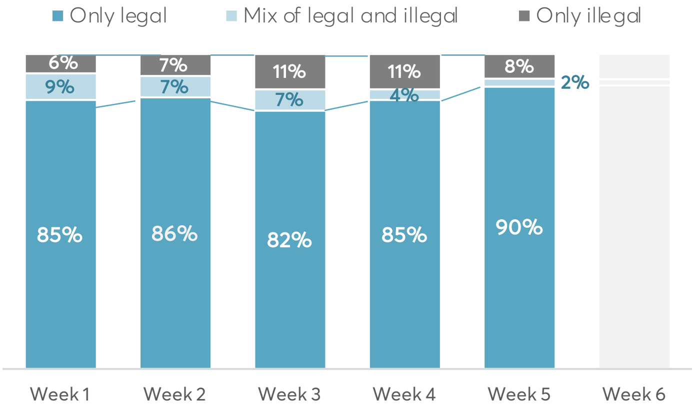
DOWNLOADING/ACCESSING

Downloading/accessing activity:

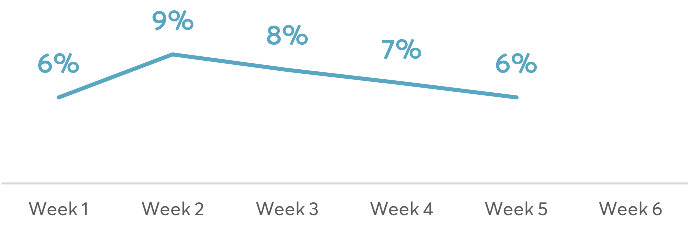
Downloading/accessing sources:

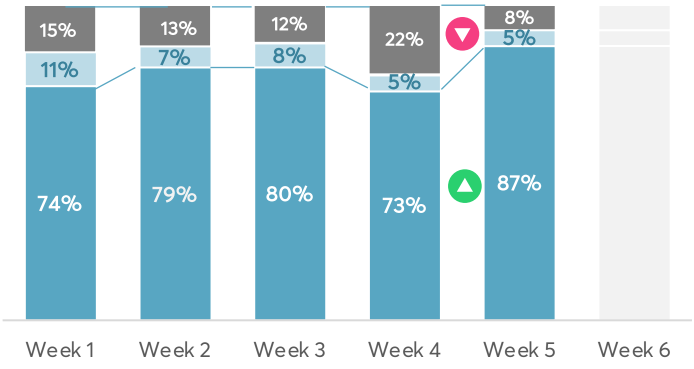
E-BOOKS



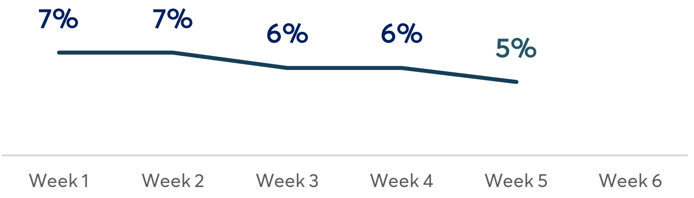


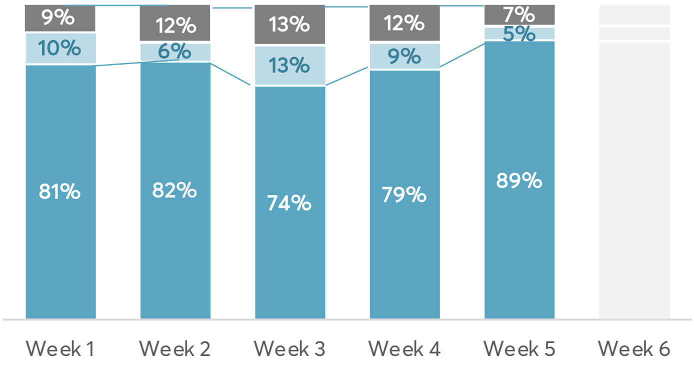
DIGITAL MAGAZINES





AUDIOBOOKS





Base: Wave 5 – 'Downloading/accessing activity', (Total sample, n=1,947), 'Downloading/accessing sources' (Weekly E-book consumers n=214, Weekly Digital magazine consumers n=93, Weekly Audiobook consumers n=83)

CATEGORY 05

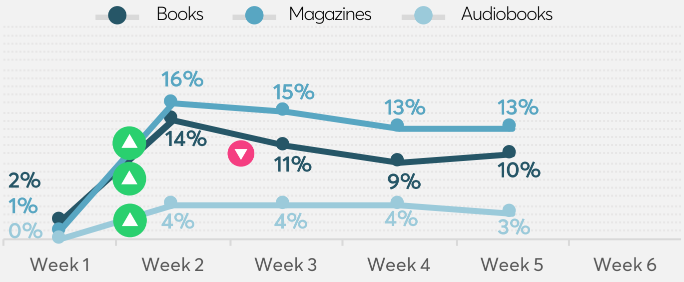
E-publishing

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	2 HRS	
Magazines						
	1 HR	1 HR	1 HR	1 HR	40 MINS	
Audiobooks						
	1 HRS	2 HRS	2 HRS	2 HRS	2 HRS	

* Any format (online or offline)

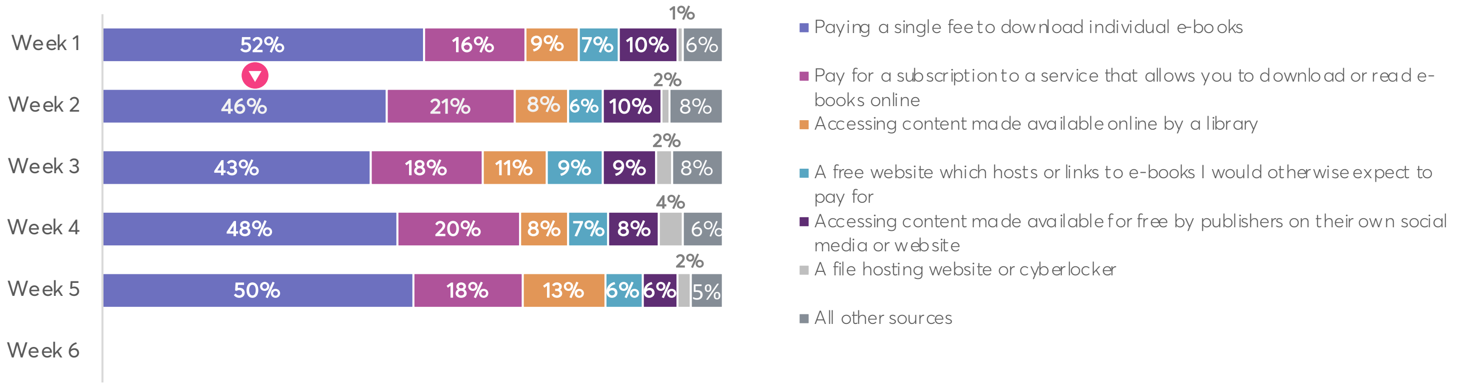
Physical purchasing:



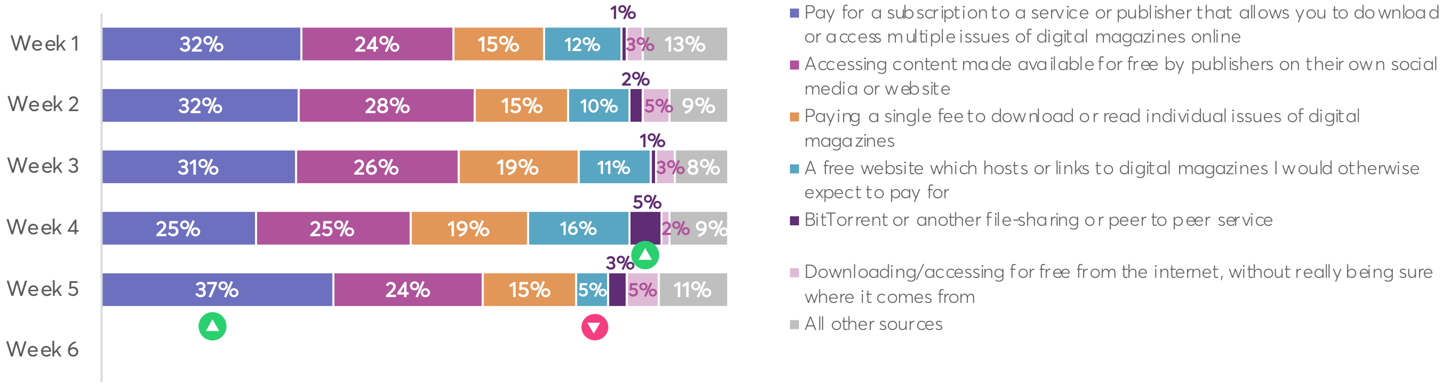
DOWNLOADING/ACCESSING

Share of downloading/accessing across sources

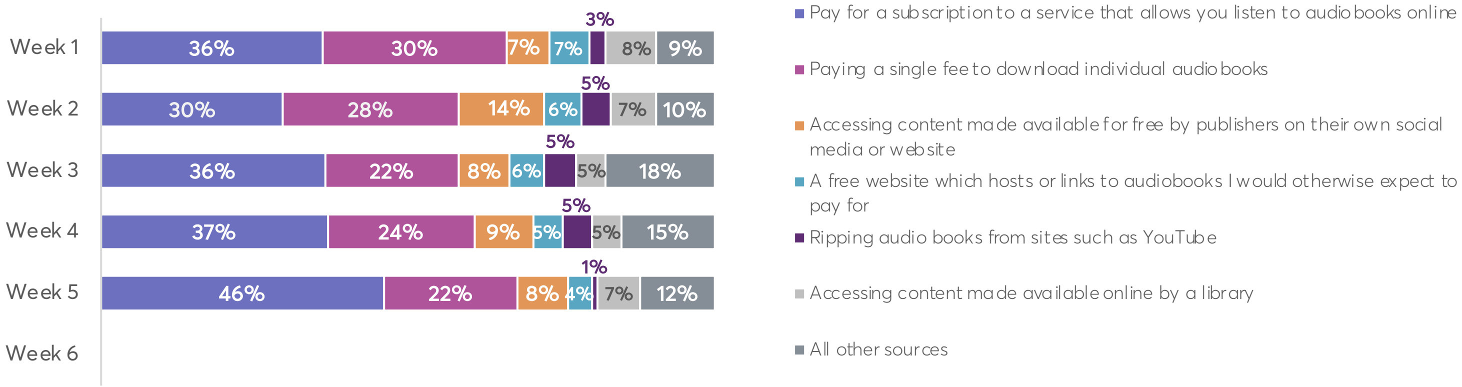
E-BOOKS



DIGITAL MAGAZINES



AUDIOBOOKS



Base: Wave 5 – 'Physical purchasing' (Total sample, n=1,947), 'Median time spent reading/listening each day' (Downloaded/accessed or purchased in past week – E-books n=358, Digital magazines n=296, Audiobooks n=102), 'Share of downloading/accessing across sources' (Weekly E-books consumers n=222, Weekly Digital magazine consumers n=112, Weekly Audiobooks consumers n=89)

Other content consumption

Looking at total weekly consumption in week 5, compared with week 4, for the other content categories, only one – conducting work meetings via video software – showed a marginal increase. One other category stayed the same, while the remainder decreased by 1 or 2 percentage points.

Looking across all the weeks to date, trends are emerging. Some categories have shown a consistent week-on-week decline in total weekly consumption. For other categories, whilst their total weekly consumption remained relatively stable, the proportion consuming them on a daily basis has declined.

Two of the categories, which reported downward trends last week, have stopped/reversed the trend in week 5.

Downward trend in total weekly consumption:

"Watch live social media streams/broadcasts…"

"Look at art, paintings online…"

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

Reduced frequency (less than daily):

"Watch videos made by other users…"

"Use video software for social activities…"

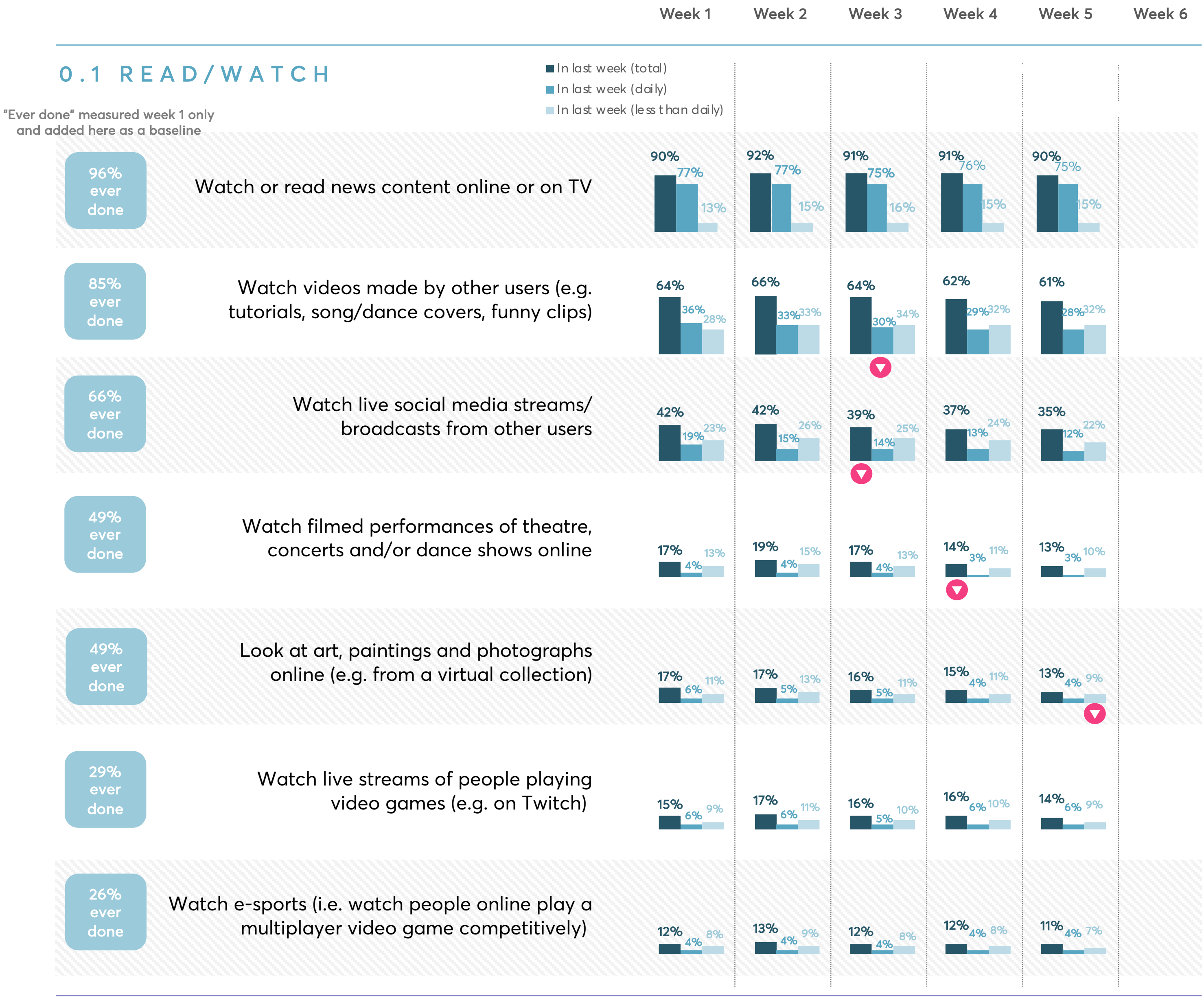
"Look at, comment on, or 'like' social media… by celebrities"

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

Stopped/reversed downward trend:

"Play online multiplayer video games…" has stabilised for total weekly consumption.

"Look at, comment on, or 'like' social media posts…" has reversed its downward trend in daily consumption reported last week.



Base: Wave 5 Total sample (n= 1,947)

Other content consumption

0.2 INTERACT WORK/SOCIAL

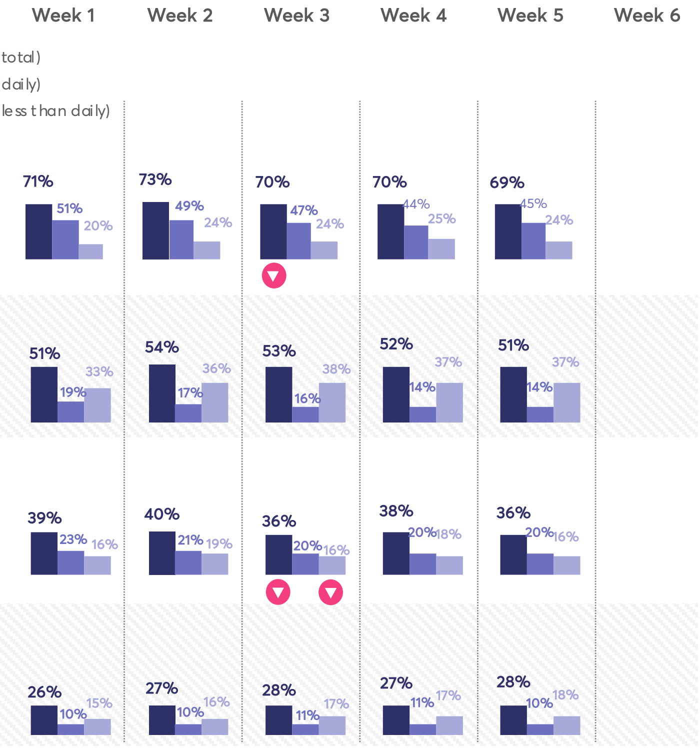
■ In last week (total)
■ In last week (daily)
■ In last week (less than daily)

82% ever done Look at, comment on, or 'like' social media posts from other users

68% ever done Use video software for social activities with friends/family

57% ever done Look at, comment on, or 'like' social media content posted by celebrities

38% ever done Conduct work meetings via video software



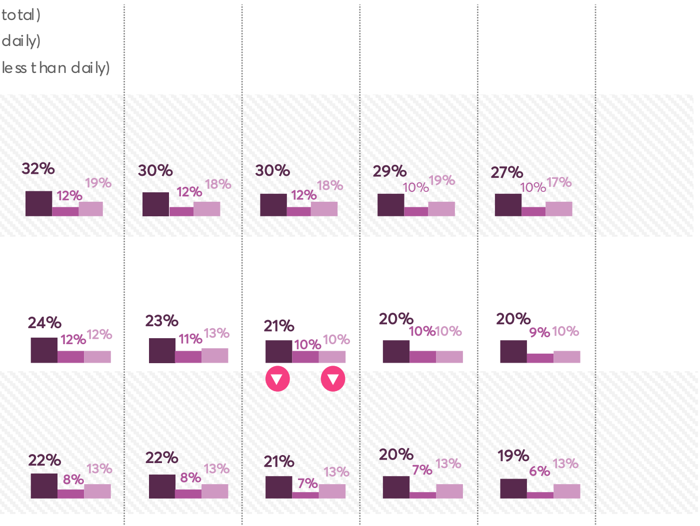
0.3 ACTIVELY PARTICIPATE

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

61% ever done Online learning such as watch free to access videos (e.g. YouTube Tutorials) or enrolling on courses

37% ever done Play online multiplayer video games (e.g. Minecraft, Fortnite) on any device inc. smartphones

36% ever done Take part in online fitness classes (e.g. on Instagram Live, YouTube Live or Zoom)



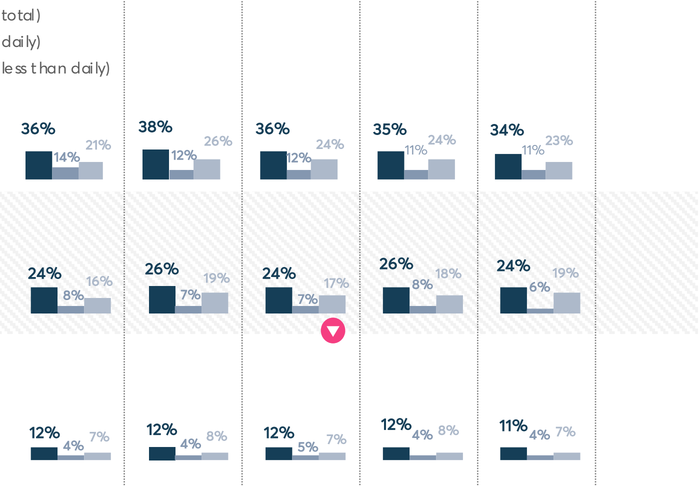
0.4 CREATE/SHARE

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

63% ever done Sharing images or videos online that are not created by you

50% ever done Create and post your own videos/written/audio content online (e.g. on Instagram, YouTube, TikTok)

29% ever done Make content you own (e.g. music, films/shows, books) publicly available by uploading files or links online



Base: Wave 5 Total sample (n= 1,947)

Digital Culture - Consumer Tracking Study

WAVE 5 OF 6 | MAY 2020

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