Creative Industries
Policy & Evidence Centre
Led by nesta

Digital Culture

Consumer Tracking Study

WAVE 9 | NOVEMBER 2020

Intellectual Property Office

AUDIENCE NET

Methodology and Sample

See Wave 1 report for the detailed overall methodology.

Survey length: 5-7 minutes.

Waves 1—6 took place in consecutive weeks in the period after lockdown was introduced in March 2020. Wave 7 ran shortly after lockdown restrictions were relaxed on the 4th of July 2020, with wave 8 taking place in August and wave 9 in September. In the charts, a red dotted line is used to indicate the break between waves 1-6 and wave 7.

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

While we have their historic behaviours tracked, each wave's respondents were 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).

Comparisons are made throughout the report between the weeks of the study that took place during lockdown (i.e. waves 1-6) and the subsequent weeks of the study (i.e. waves 7-9).

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

Week 9 comprises many of the same respondents who took part in weeks 1-8 (n=606). As in weeks 7-8, fresh sample was added to the cohort in order to correct for biases and ensure that the overall sample for each wave (n=1,000) is representative of the UK 16+ population.

Note:

- As the weeks progress and the base sizes become smaller, the statistical margin of error increases. This is especially noticeable for some categories.
- Data from questions on how much users spent on paid sources each month were included in week 9. These were previously only included in weeks 1, 6, 7 and 8.

*Key:

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

Indicates the start of Wave 7

Week	1	2	3	4	5	6	7	8	9
Fieldwork Dates	9th – 19th April	20th – 26th April	27th Apr – 3rd May	4th – 10th May	11th – 17th May	18th – 24th May	13th – 19th July	10th – 16th August	21st – 27th Sept
Periods covered by survey	2nd – 12th April	13th – 19th April	20th – 26th April	27th April – 3rd May	4th – 10th May	11th – 17th May	6th – 12th July	3rd – 9th August	14th – 20th Sept
Sample size	3,863	2,792	2,369	2,132	1,947	1,074	1,001	1,000	1,000

Overview

Context for this study

The Creative Industries Policy and Evidence Centre (PEC) and the IPO commissioned AudienceNet to explore how consumers aged 16+ engage with digital cultural content in the home (more information about the context and aims of the study can be found in the Wave 1 report).

The first 6 waves of this study were conducted during lockdown, from the 2nd of April to the 17th of May. An additional three waves of the study were conducted approximately one month apart in July, August and September, beginning immediately after lockdown restrictions were eased on the fourth of July.

This is the ninth wave of this study in which respondents were asked about their content consumption, from the 14th to the 20th of September. This was approximately two months since lockdown restrictions had been relaxed in the UK. It also fell shortly after schools had reopened and just after new restrictions had been put in place in some parts of the UK in mid-September, which included rules in England that no more than six people could meet inside socially.

Time spent consuming content daily

Respondents were asked how much time they had spent consuming content daily, online or offline. The study found that there were changes to the way that people consumed content during periods of full lockdown, and periods when lockdown rules were less stringent. These changes in consumption, that affected some categories more than others, persisted until mid-September when fieldwork for wave 9 was completed.

TV continued to have the highest median time per day of any category. At four hours in wave 9 this was unchanged from waves 7-8 but was higher than waves 2-5 where it had ranged between 3.1-3.5 hours.

Music, at 2 hours per day, was unchanged from the previous wave and was 0.5 hours lower than any of the lockdown weeks of the study. Video games, at 2 hours, was the same as wave 7 and an hour lower than each of the lockdown weeks of the study.

Film, at 2.5 hours per day, was unchanged from the previous four weeks.

The e-publishing categories either remained at 2 hours (audiobooks) or experienced marginal drops (books from 2 hours to 1 hour 45 minutes and digital magazines from 1 hour to 45 minutes).

Levels of downloading, streaming, accessing

Since lockdown restrictions began to ease the proportion of people downloading content largely increased, with levels in waves 7-9 that were higher than all or most of the lockdown weeks of the study. This was evident in music where between 28-31% had downloaded music in waves 7-9, which was close to or above the peak in wave 2 (28%) but higher than all other lockdown waves of the study (where it ranged between 13-23%). A similar pattern was repeated in film and TV.

Streaming, in contrast to downloading, continued to be lower for some categories after lockdown restrictions were eased. In film and TV the proportion who had streamed content in waves 7-9 was at the lower end of what it had been in the lockdown weeks (39-43% for film and 40-41% for TV). In music, however, the proportion who streamed was between 58-61% during waves 7-9, which was near the previous peak in wave 2 (60%) and above all other lockdown weeks of the study (43-51%).

The proportion downloading/accessing e-books, at 16-18% in waves 7-9, remained in line with, but at the upper end of, what it had been during the lockdown weeks of the study (where it ranged from 11-18%). Video games followed a similar pattern

Overview

with between 15-21% downloading/accessing in waves 7-9, compared with between 11-17% in waves 1-6. Digital magazines and audiobooks were consistent with the previous wave of the study (digital magazines at 7% and audiobooks at 5%).

Physical purchasing

There was a sustained increase in most categories in the proportion of people who were purchasing physical goods since lockdown restrictions were relaxed (i.e. waves 7-9) compared with most of the lockdown weeks of the study.

This was the case in music, film, video games and books. In other categories they were either consistently high in most weeks (e.g. magazines) or were generally quite low (e.g. TV, audiobooks).

Legal and illegal sources

In the waves since lockdown restrictions had been relaxed (wave 7 onwards), the was an increase in the number of people using an illegal source to access content in some categories.

In wave 9 this continued, with some categories either seeing further increases, such as in downloading music (+4% compared to the previous wave), or the proportion held steady with levels higher than the majority of the lockdown weeks of the study (downloading and streaming for film and TV).

But these estimates are volatile: Video games, after experiencing a spike in week 8 in terms of illegal activity at 14% (the highest level seen in the study to date), dropped to 5% which is at the lower end of the levels seen during the lockdown weeks of the study.

In terms of the e-publishing categories, the proportion using an illegal source to access e-books remained fairly consistent in waves 7-9 (15% in wave 9 and 13-15% in the two previous waves) and when.

In terms of the e-publishing categories, the proportion using an illegal source to access e-books remained fairly consistent in waves 7-9 (15% in wave 9 and 13-15% in the two previous waves) and when compared with the lockdown weeks of the study (10-18% in waves 1-6). Both digital magazines and audiobooks experienced declines between waves 8 to 9 (-15% and -7% respectively). Although, for both categories, this was indicative of fluctuations from week to week throughout the course of the study.

Other content categories

Consumers of a range of less traditional online content categories were also asked about how frequently they engaged with them. This included activities relating to reading/watching, interacting socially or through work, actively participating, creating or sharing and audio content. Most categories remained stable compared with the previous two waves of the study which took place after lockdown restrictions were relaxed.

Differences between this wave and the previous one included an increase in those who were conducting work meetings via video software at least once a week (by 6% to 31%) to take it to the highest point it had been in the study. There was also a decrease in those taking part in online fitness classes at least once a week, which fell by 4% to 12% to take it to the lowest point it had been during the study (10% lower than the peak in weeks 1 and 2).

Categories relating to playing or watching people play video games or e-sports continued to be resilient with the proportion doing so daily remaining consistent throughout all weeks of the study (i.e. both in lockdown and since it ended).

Cultural consumption relating to watching filmed performances (e.g. theatre, concerts) or looking at art and paintings were both resilient with the proportion doing these activities at least once a week remaining broadly unchanged (i.e. +/- 1%) in waves 7-9. In both instances they were below the

Overview

higher levels that were seen during the earlier lockdown weeks of the study (watching filmed performances was 9% below the peak in week 2 while looking at art and paintings online was 5% below the peak in weeks 1-2).

Wellbeing and lifestyle

In the three monthly waves of the study since lockdown restrictions were relaxed (i.e. 7-9) there were very minimal movements (+/- 0.01) in terms of the four wellbeing measures asked about which match those used by the ONS. Compared to the lockdown weeks of the study, satisfaction with life, feeling things are worthwhile and feeling happy were generally within the range of, or slightly above, average scores recorded over the previous six waves. Feelings of anxiety remained at the level seen in the last three lockdown weeks of the study but below that seen in the first few waves.

As might be expected, there continued to be changes in the proportion who said their work/lifestyle had changed as a result of the impact of the COVID-19 pandemic. The proportion of those working outside the home and working from home some of the time increased, while there were decreases in those who had stopped working completely (e.g. those who had been furloughed) or who were home-schooling their children.

Local lockdown

Throughout the period in which waves 7 to 9 were taking place some parts of UK were in local lockdowns at various points. For example, parts of Leicester were in lockdown for the entirety of this time, large parts of the North of England had restrictions put in place in August, while Birmingham experienced restrictions in September.

By comparing the changes in content consumption over these successive waves by individuals in areas of lockdown with those for individuals not in lockdown we gain insights into the impacts of lockdown on consumption levels.

In England, in the case of individuals who were moving into lockdown, there were increases in the median consumption of film and TV. However, median consumption did not change significantly in the case of individuals who remained out of lockdown. Notwithstanding the limited sample sizes, this finding is highly suggestive that on average individuals increase their consumption of film and TV as a result of being in lockdown

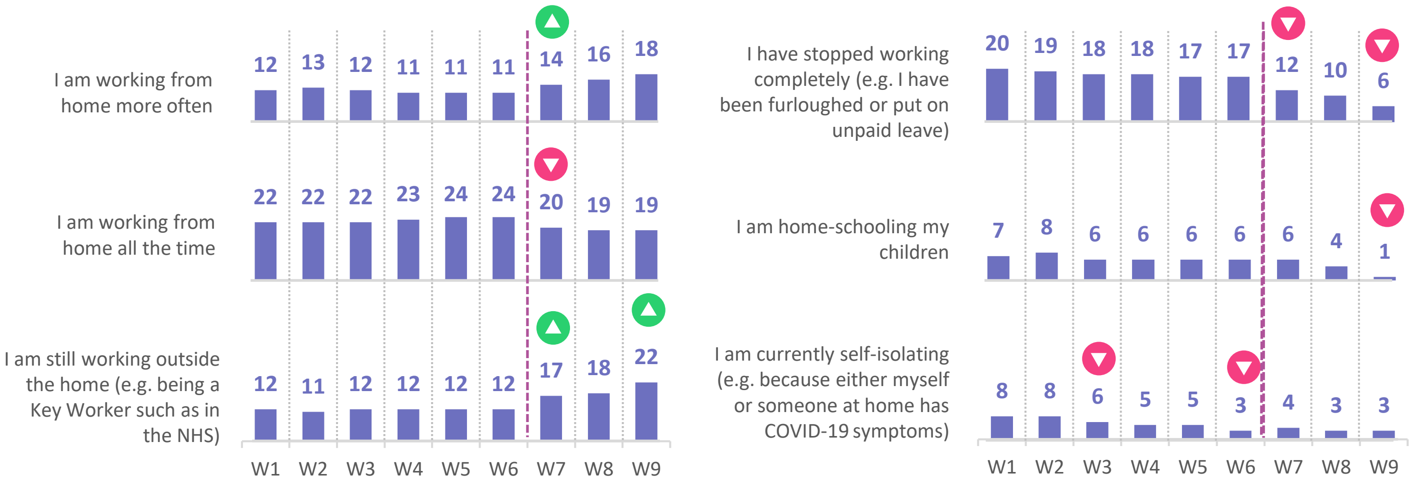
Wellbeing and Lifestyle

- All measures relating to wellbeing were broadly unchanged (+/- 0.1) for the average scores across the three weeks of the study which took place after lockdown restrictions were relaxed (i.e. Waves 7-9). Compared with the lockdown weeks of the study, satisfaction with life, feeling worthwhile and happiness were all just above or near their peak from that time. Anxiety was in line with the last three lockdown weeks of the study but below that seen in the first three weeks.
- All measures relating to wellbeing had average scores which were different to when the same questions were asked by the ONS over the longer time period of April 2019 to March 2020 (life satisfaction, feeling worthwhile and happiness all ranged between 7.5-7.9 with anxiety at 3.1).
- The shifts in work/lifestyle owing to COVID-19 seen in the last wave continued:
  - There was an increase in those who are working outside the home and those who say they are working from home “more often”.
  - There were decreases in those who had “stopped working completely (e.g. had been furloughed)” or are “home-schooling” their children.
  - Working “outside the home” continued to be significantly higher than during lockdown.

Wellbeing | Average (0 - 10)

	W1	W2	W3	W4	W5	W6	W7	W8	W9
All things considered, how satisfied are you with your life as a whole nowadays?	6.3	6.3	6.3	6.4	6.4	6.5	6.5	6.5	6.5
To what extent do you feel that the things you do in your life are worthwhile?	6.7	6.6	6.5	6.5	6.5	6.5	6.6	6.6	6.6
How happy did you feel yesterday?	6.3	6.3	6.3	6.4	6.4	6.4	6.5	6.6	6.5
How anxious did you feel yesterday?	4.8	4.5	4.4	4.2	4.2	4.1	4.3	4.2	4.3

Changes in work/lifestyle due to COVID-19:



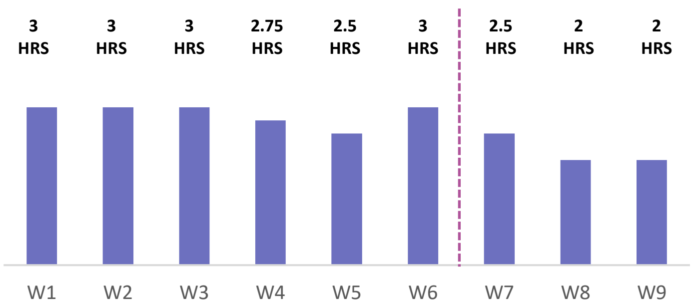
CATEGORY 01

Music

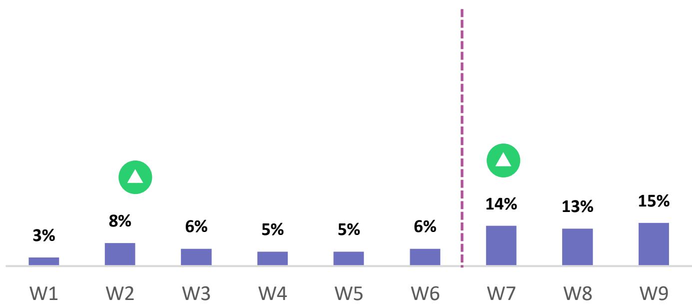
- Median hours spent listening to music (either online or offline) was 2 hours per day in wave 9. This was unchanged from the previous wave with both being lower than any of the lockdown weeks of the study.
- The proportion downloading music, at 30%, was in line with the previous two waves (28-31%), which was higher than the last four lockdown weeks of the study (where it ranged from 13-18%).
- At 5, the median number of tracks downloaded in the past week remained broadly in line with the preceding six waves (where it ranged between 4-6).
- The proportion using partly or wholly illegal downloading sources, at 34%, was 4% higher than the previous wave and was the second consecutive week of 4% growth. This was at the upper end of what it had been in previous weeks of the study.
- Looking at share of downloading sources, “Saving offline via a paid subscription service” remained the dominant method of downloading, continuing to account for over half (53%) of all music downloads. ”Paying a single fee to download” and “downloading from sites such as YouTube” remained in second and third place with 18% and 13%, respectively.
- The proportion of respondents who had streamed music, at 60%, was in line with the previous two waves of the study (where it ranged between 58%-61%) and was higher than all but week two of the lockdown weeks of the study.
- Legal streaming sources, at 98%, remained virtually unchanged since the beginning of the study (98-100%), with the use of illegal sources being negligible.
- A “paid for subscription service” maintained the highest share (44%) of streaming across sources. Those using a “site such as YouTube” and ”a free version/tier of a streaming service” maintained their positions in second and third place with 23% and 18%, respectively. The share of “listening to the radio online”, at 8%, continued to be higher than it had been for the last four weeks of the lockdown waves.
- The increased level of physical purchasing seen since lockdown ended continued and, at 15%, was almost twice as high as the highest point during lockdown (8% in wave 2).
- The median amount spent in a month on “a paid subscription service” was, at £9, broadly unchanged compared to previous waves.

CONSUMPTION

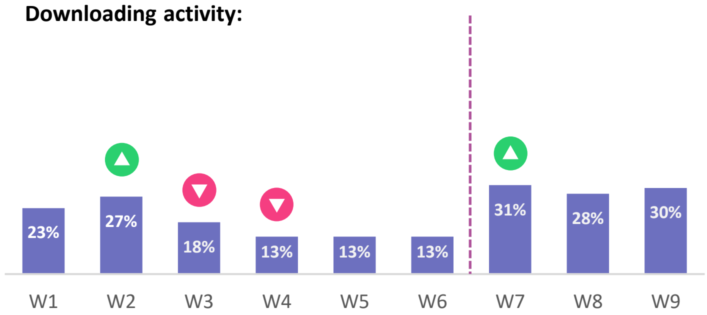
Median time spent listening to music in any format (online or offline) each day:



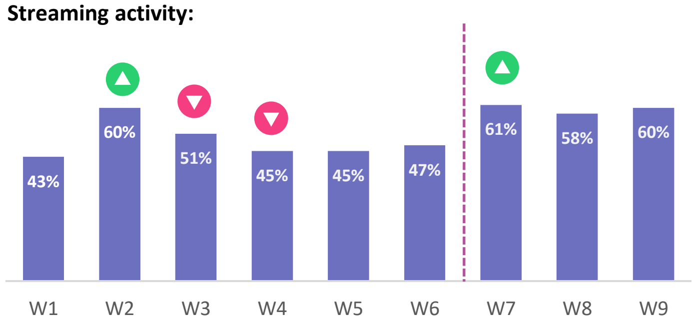
Physical purchasing activity:



Downloading activity:

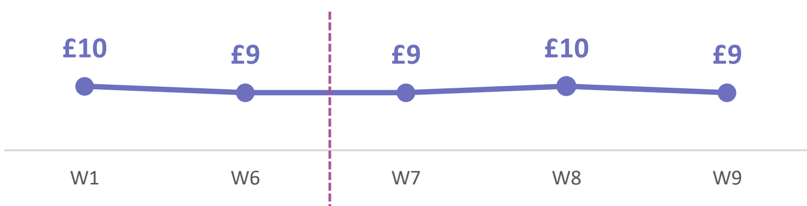


Streaming activity:



Median amount spent each month on:

A paid for subscription service such as Spotify Premium, Amazon Prime Music, or Apple Music

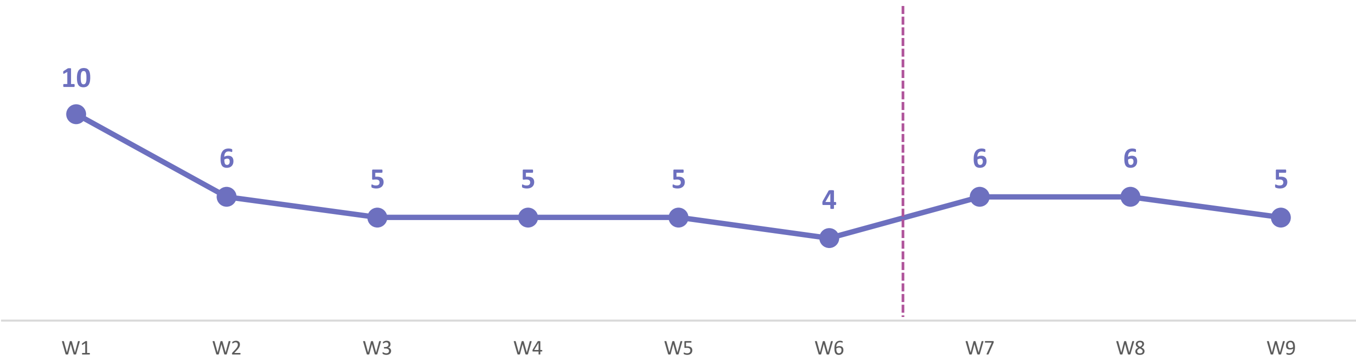


CATEGORY 01

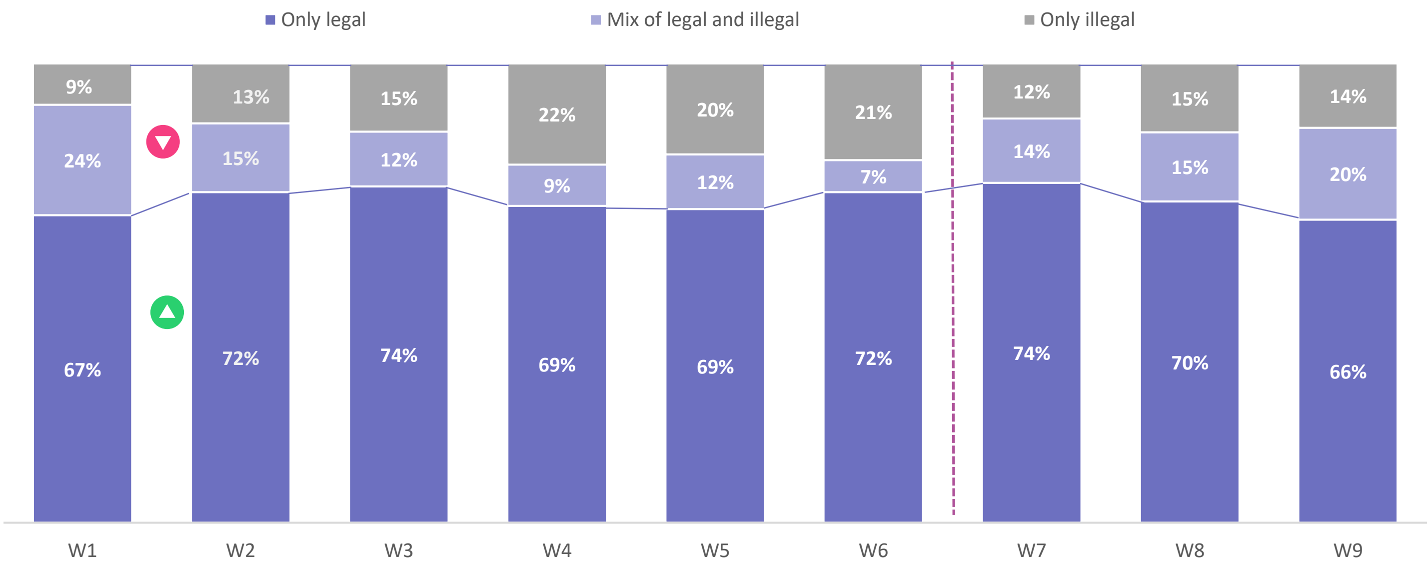
Music

DOWNLOADING

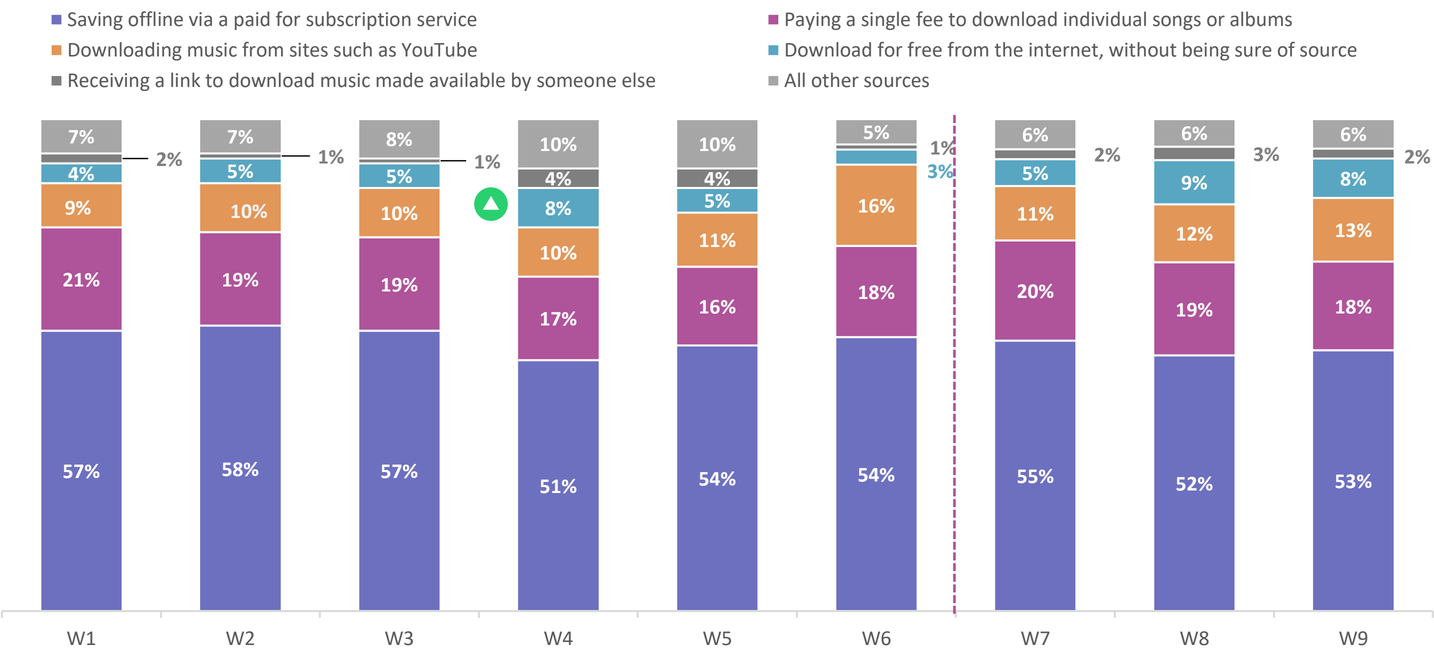
Median number of tracks downloaded in past week:



Downloading sources:



Share of downloading across sources:

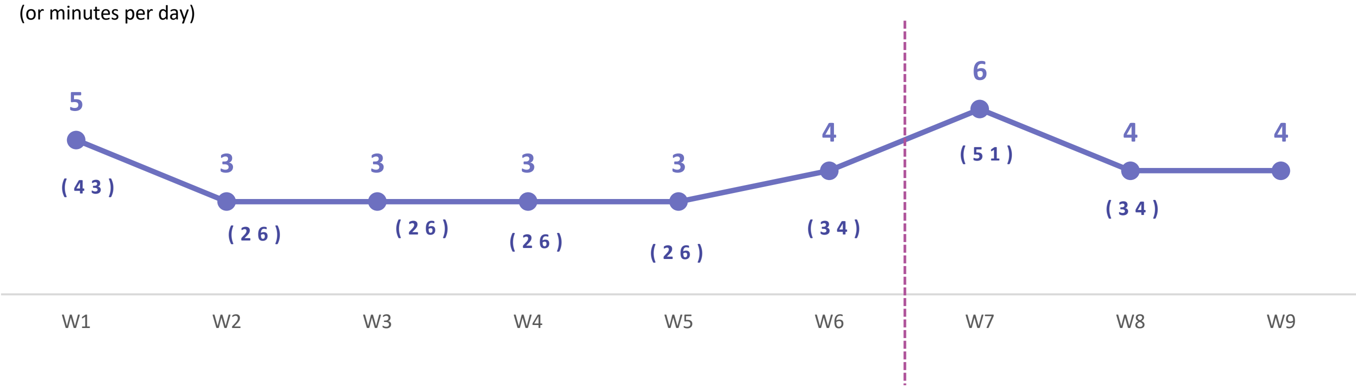


CATEGORY 01

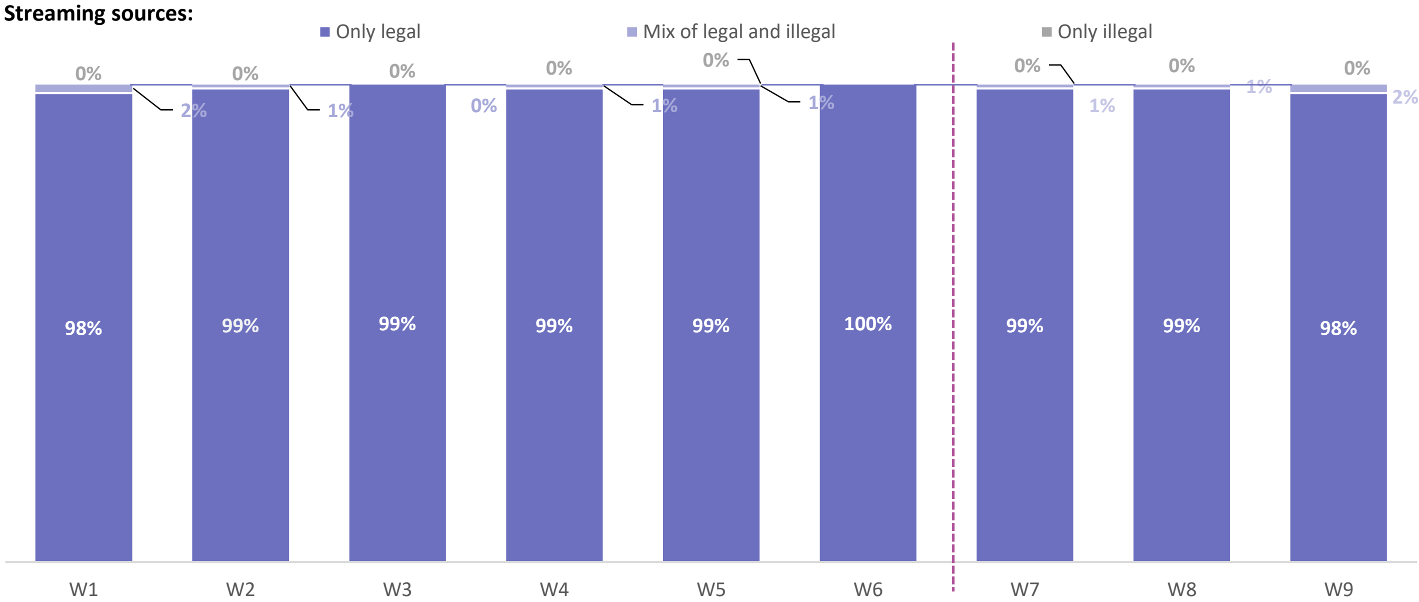
Music

STREAMING

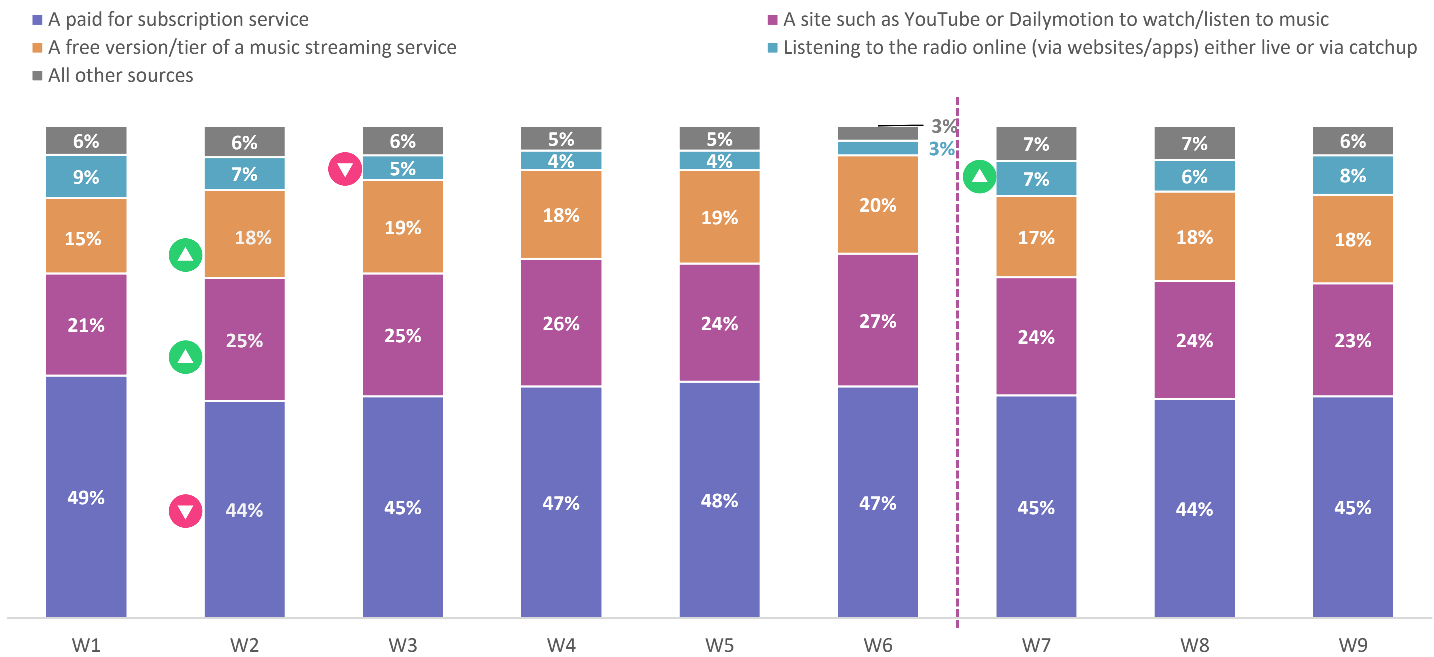
Median hours spent streaming in past week:
(or minutes per day)



Streaming sources:



Share of streaming across sources:



Base: Wave 9 – 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly music streamers, n=597-602)

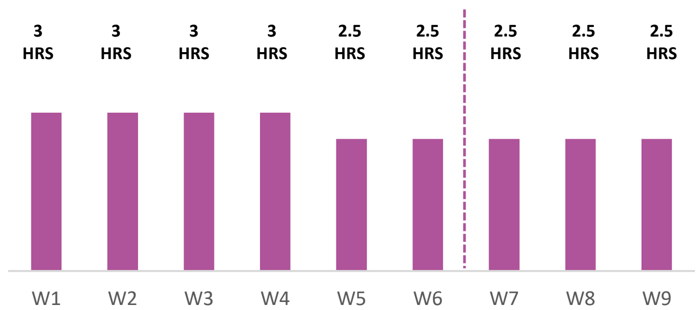
CATEGORY 02

Film

- Median hours spent watching films (either online or offline) was 2.5 hours per day in week 9. This was unchanged from wave 7 and broadly in line with the lockdown weeks of the study (where it ranged from 2.5-3 hours).
- The proportion downloading films, at 25%, was 3% higher than the previous wave and matched the previous peak of the study (wave 2).
- The median number of downloads in the past week remained at 2 for the eighth consecutive wave.
- The proportion using partly or wholly illegal downloading sources, at 17%, was 2% lower than the previous wave. It was also above all but the first week of the study, when it was 24%.
- "Saving offline via a paid for subscription service" remained the dominant method, accounting for 67% of all film downloads, which was the highest share it had experienced during the study. This was followed by "paying a single fee to download" at 11%.
- The proportion streaming films, at 41%, was 2% higher than the previous wave but was still lower than it had been in every other week of the study.
- Median hours spent streaming films in the past week was 4. This was in line with both the previous wave and the lockdown weeks of the study, where it had ranged between 4-6 hours.
- The proportion using partly or wholly illegal downloading sources was, at 10%, unchanged from the previous week and was also in line waves 3 to 7 of the study (where it had ranged between 7-10%).
- A "paid subscription service to an online video streaming service" maintained its position as the dominant source of access, by some way. It accounted for 77% of all time spent streaming although it has declined in share compared with waves 7 (-2%) and 8 (-4%).
- The proportion making physical purchases, at 12%, was 3% lower than the peak in wave 7 but still higher than all but wave 2 of the lockdown weeks of the study.
- The median amount spent on "a paid subscription service" each month remained stable at £9.

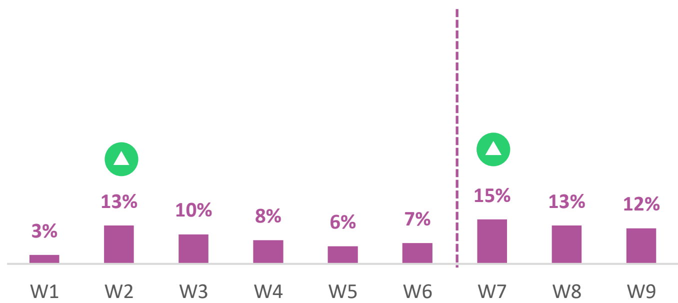
CONSUMPTION

Median time spent watching films each day*:

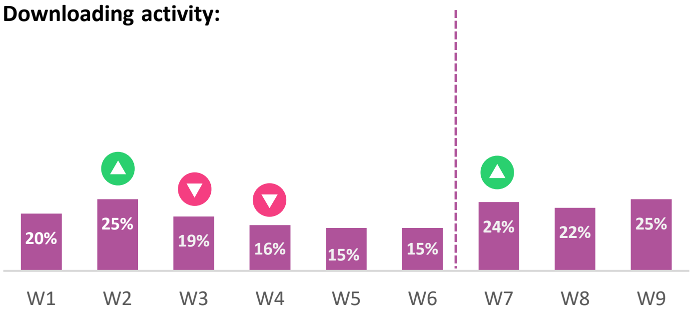


* Any format (online or offline

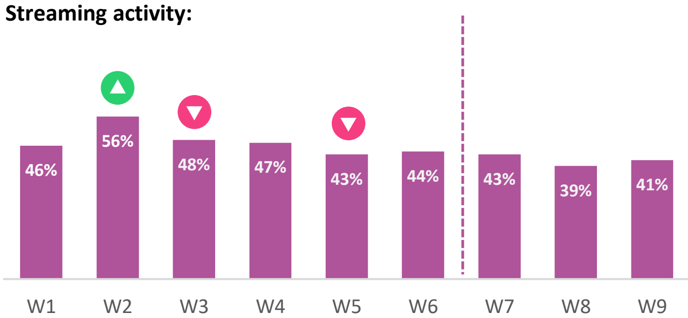
Physical purchasing activity:



Downloading activity:

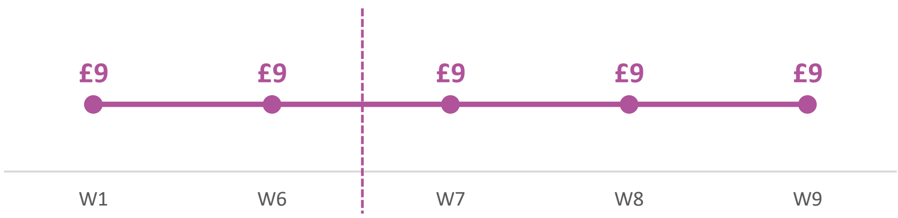


Streaming activity:



Median amount spent each month on:

A paid for subscription service such as Netflix, Amazon Prime Video, NowTV etc.

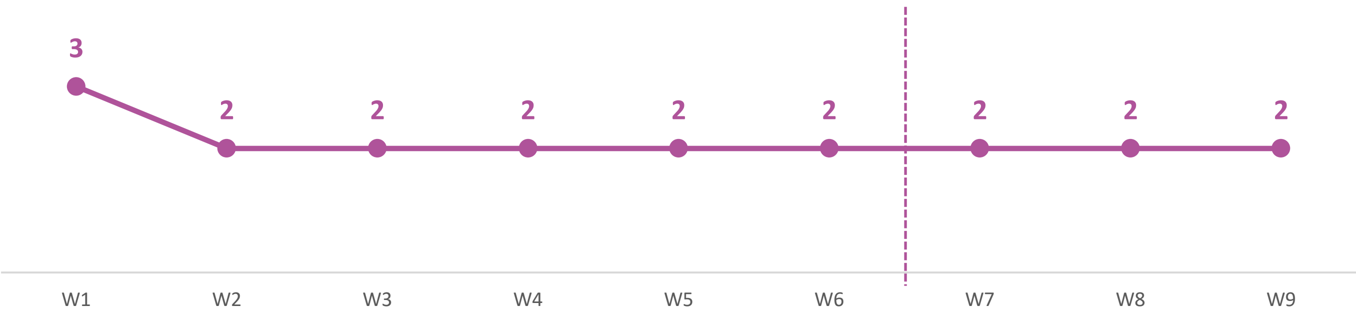


Base: Wave 9– 'Median time watching films each day' (watched films in past week in any format n=697), 'Downloading activity', 'Streaming activity', 'Physical purchasing' (Total sample, n=1,000), 'Median amount spent each month' (users of 'A paid for subscription service' n=473)

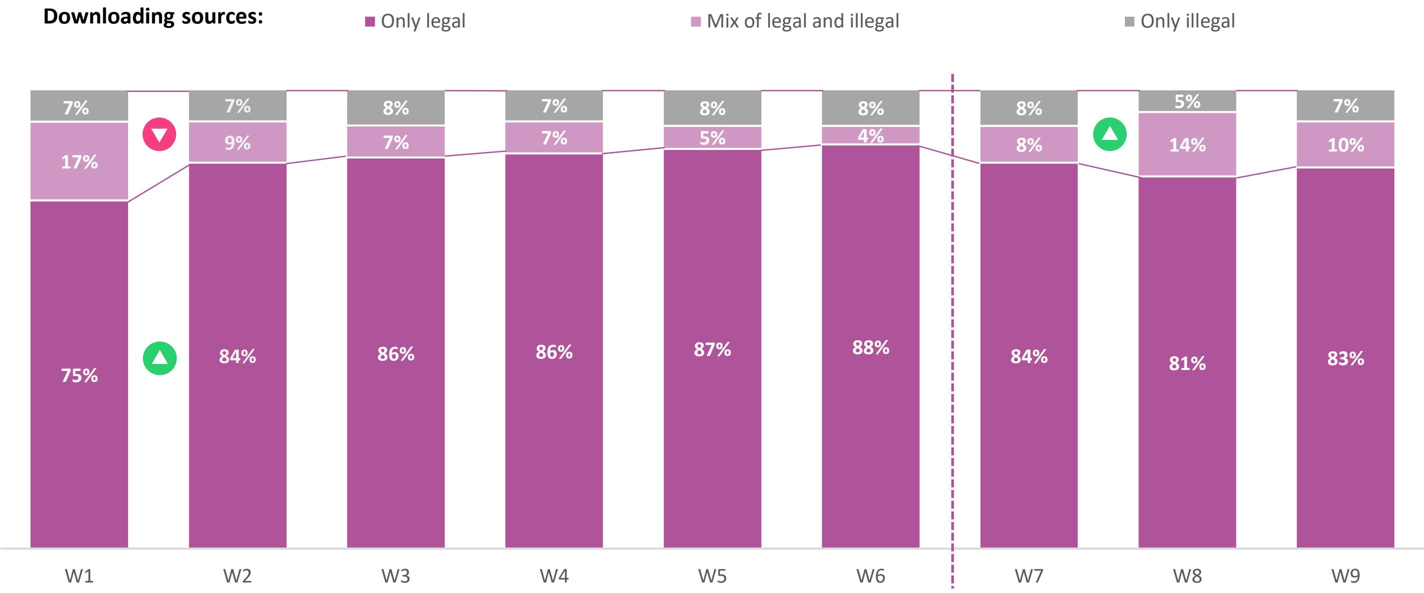
Film

DOWNLOADING

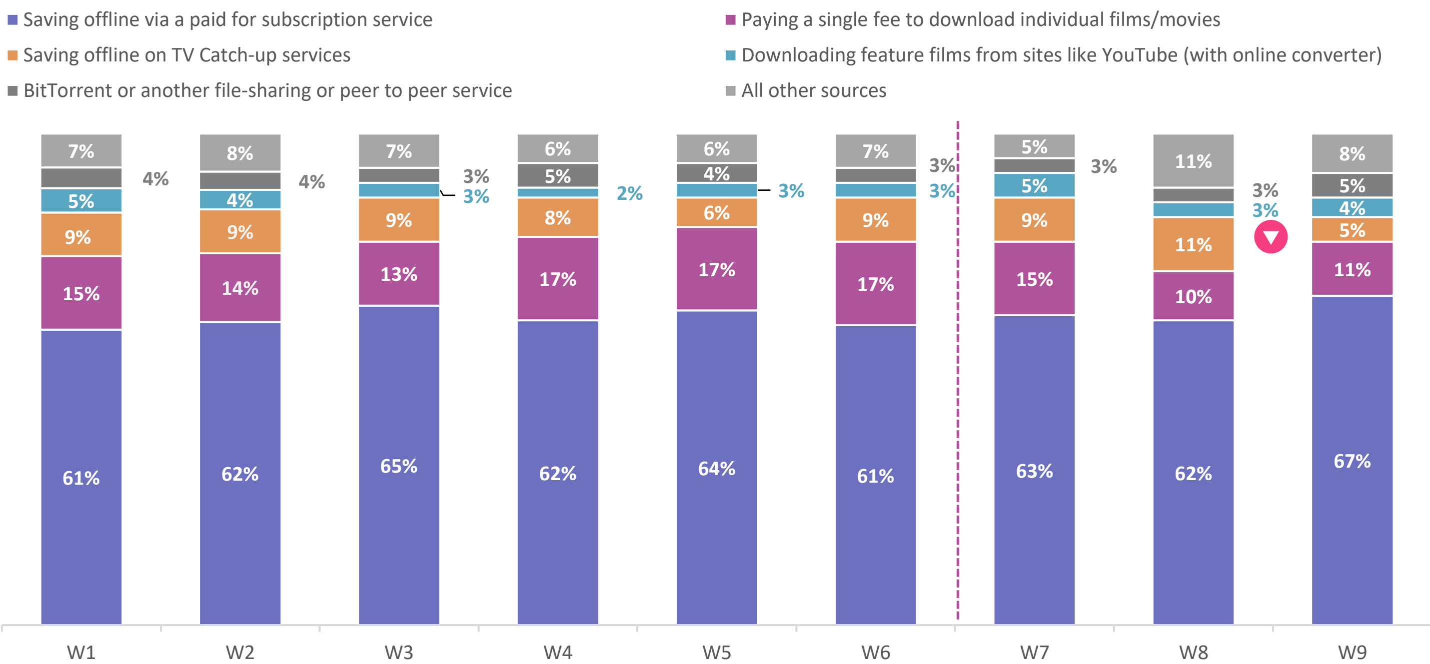
Median number of downloads in past week:



Downloading sources:



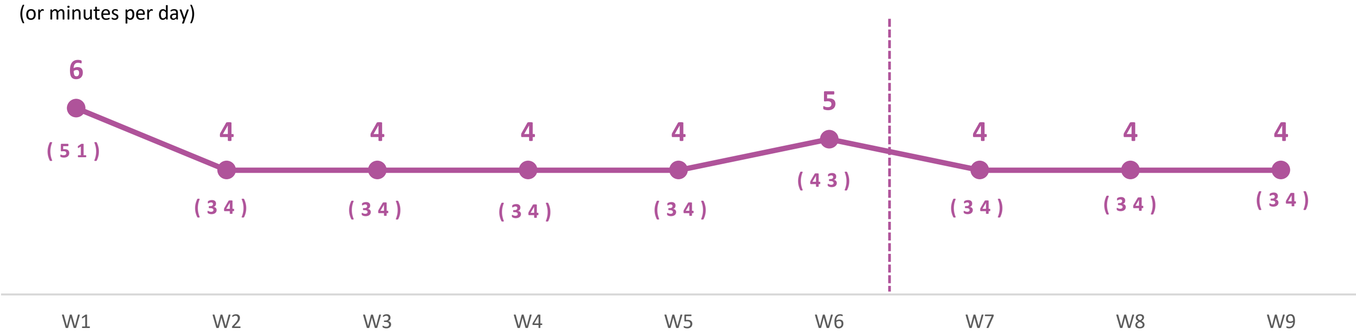
Share of downloading across sources:



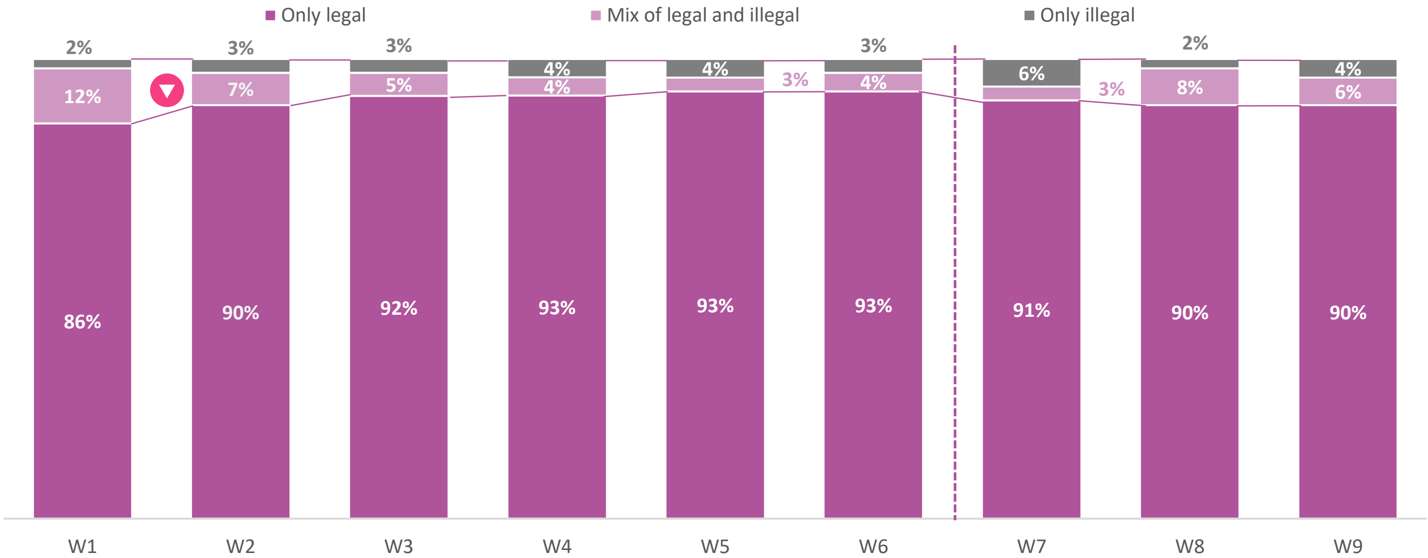
Film

STREAMING

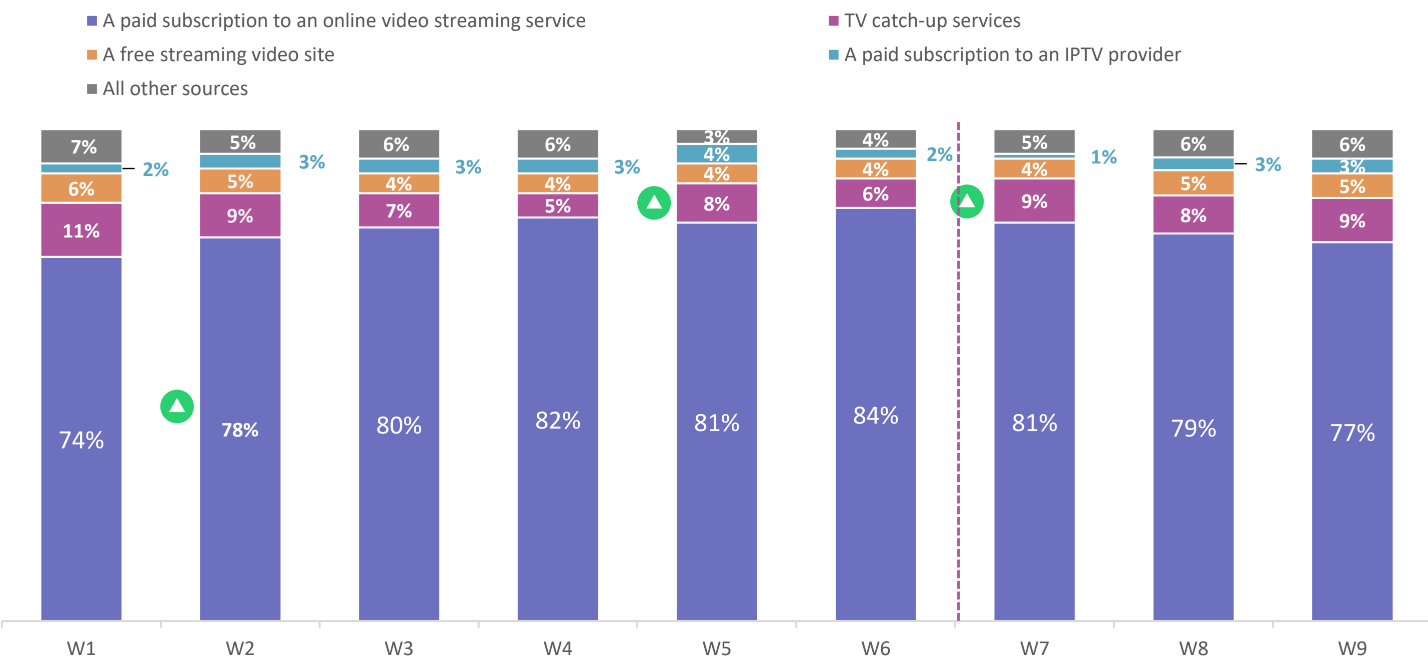
Median hours spent streaming in past week:
(or minutes per day)



Streaming sources:



Share of streaming across sources:



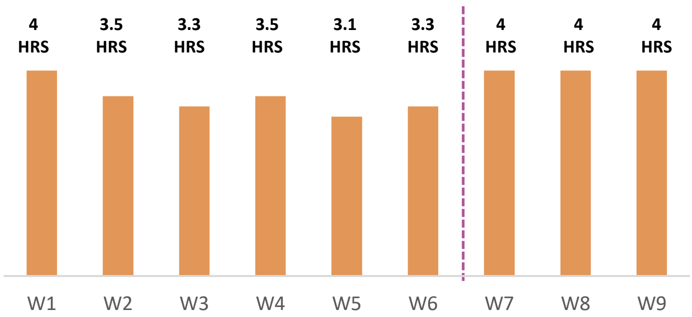
CATEGORY 03

TV

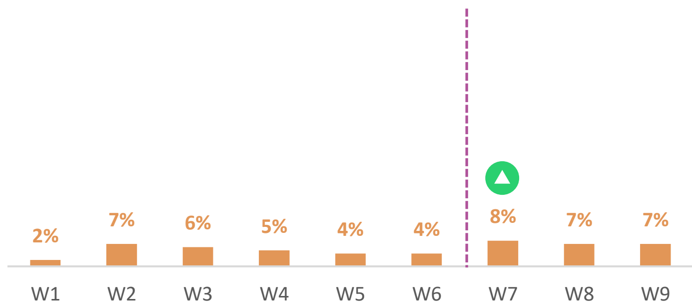
- Median hours spent watching TV (either online or offline) was 4 hours per day in week 9. This puts all of waves 7-9 right at the upper end of what it had been during previous waves of the study (where it ranged from 3.1-4 hours).
- The proportion downloading TV shows was, at 21%, broadly unchanged from the previous two waves (20-21%) and higher than all but one of the lockdown waves (week 2 - where it was also 21%).
- The median number of downloads, at 3, was consistent with previous waves, where it had ranged between 3-5.
- The proportion using partly or wholly illegal downloading sources was 15%, which was unchanged from the previous wave. This was closest to the highest points in the study, which were in waves 1 (18%) and 2 (16%).
- For share of downloading across sources, "Saving offline on a paid for subscription service" remained the dominant method at 52%. "Saving offline on catch-up services" was still in second place with 23% which was 2% higher than the previous wave but 7% lower than wave 7.
- The proportion of respondents streaming TV, at 40%, was unchanged from the previous wave and was slightly lower than it had been during the entire course of the study (but only by 2% for wave 1 and 1% for wave 7).
- The proportion using partly or wholly illegal streaming sources was, at 9%, just above but consistent with the previous seven waves of the survey, where it had ranged between 5-8%.
- A "paid subscription to an online video streaming service" continued to have the largest share of time spent streaming. At 65%, this was at the lowest point it had been in the study and was 9% below the peak in waves 5 and 6. TV catch-up services remained in second place with a 20% share.
- The proportion of those who had made a physical purchase continued to be at the upper end of the previous weeks of the study. At 7% it maintained the levels seen in the last wave and those seen in the previous peak in wave 2.
- The median amount spent on "a paid subscription service", at £9, was unchanged from the previous wave.

CONSUMPTION

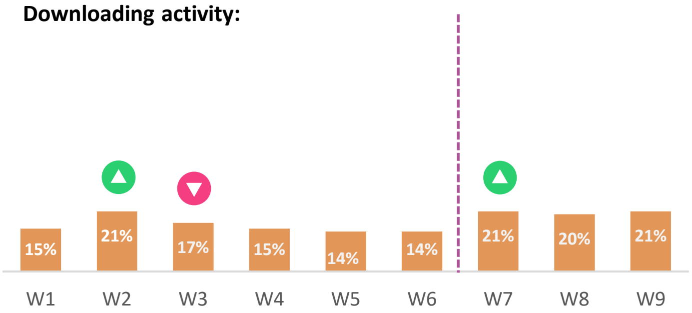
Median time spent watching TV in any format (i.e. online or offline) each day:



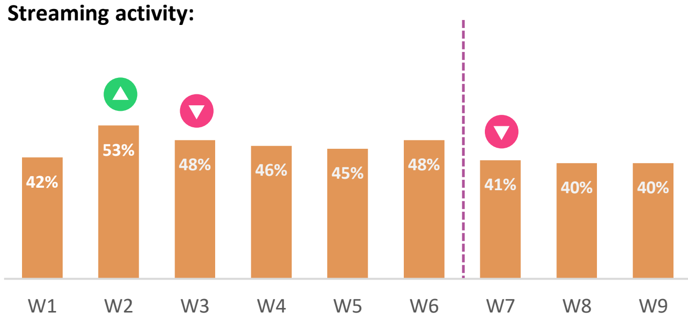
Physical purchasing activity:



Downloading activity:

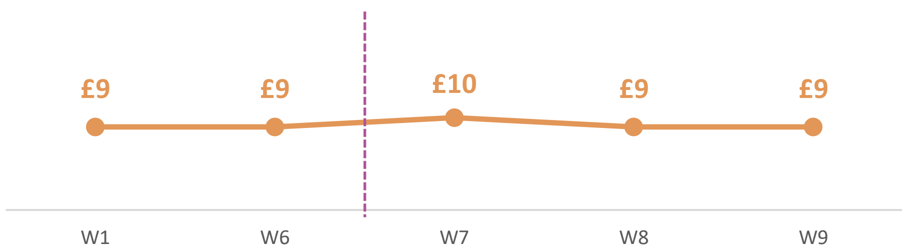


Streaming activity:



Median amount spent each month on:

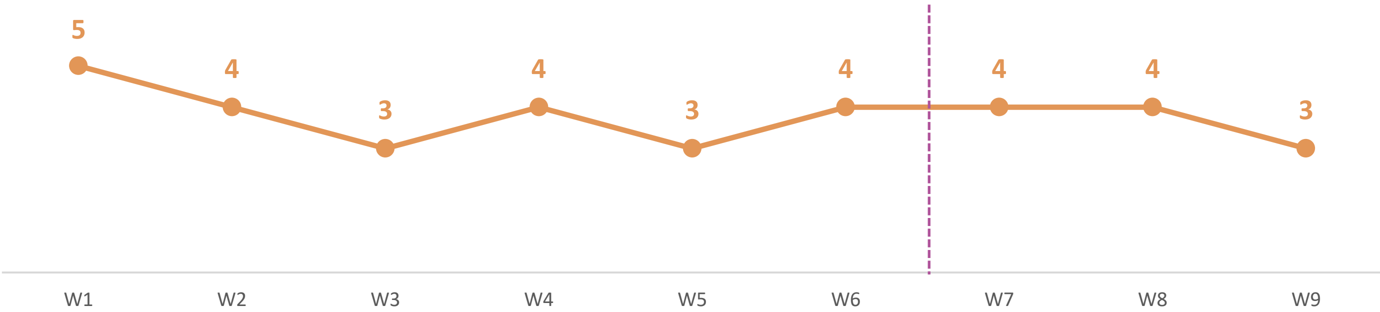
A paid for subscription service such as Netflix, Amazon Prime Video, NowTV etc.



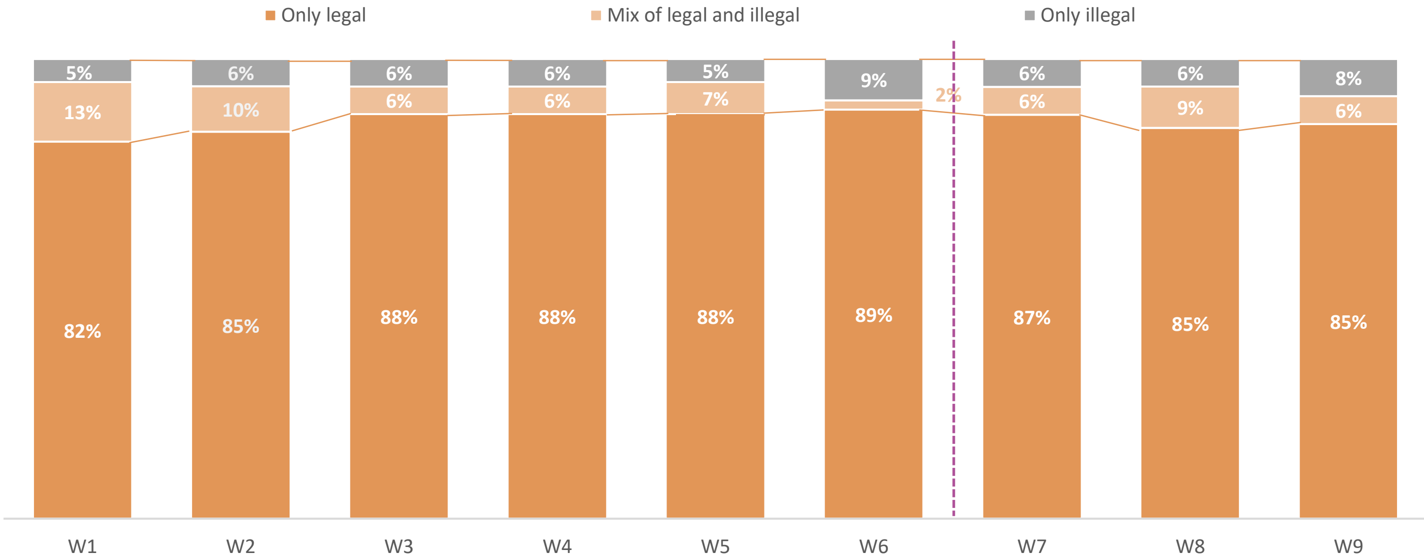
Base: Wave 9 – 'Median time watching TV each day' (watched TV in past week in any format n=867), 'Downloading activity', 'Streaming activity', 'Physical purchasing' (Total sample, n=1,000), 'Median amount spent each month' (users of 'A paid for subscription service' n=448)

DOWNLOADING

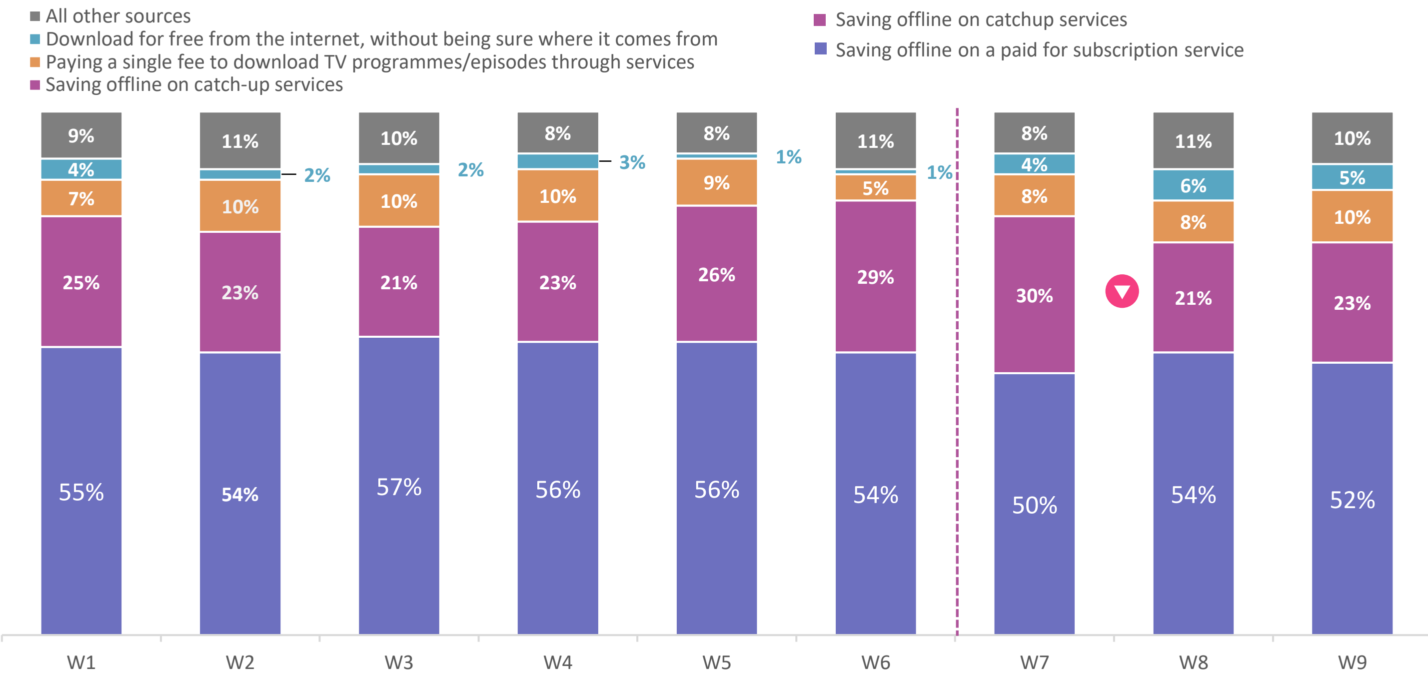
Median number of downloads in past week:



Downloading sources:



Share of downloading across sources:

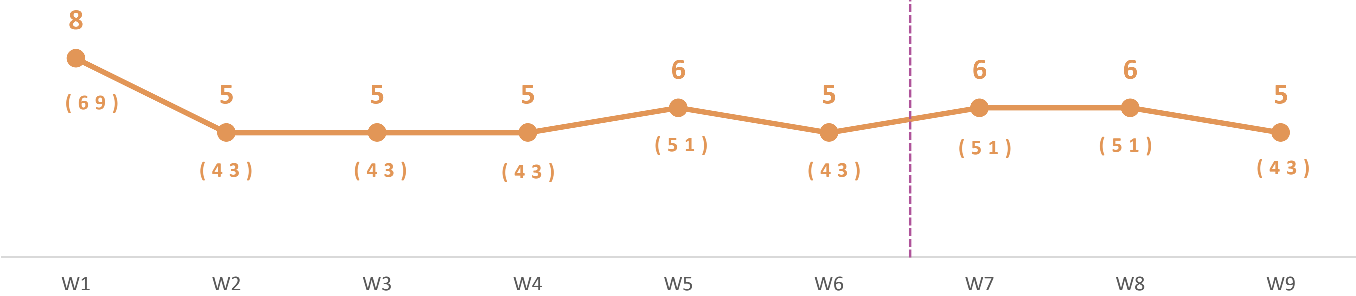


CATEGORY 03

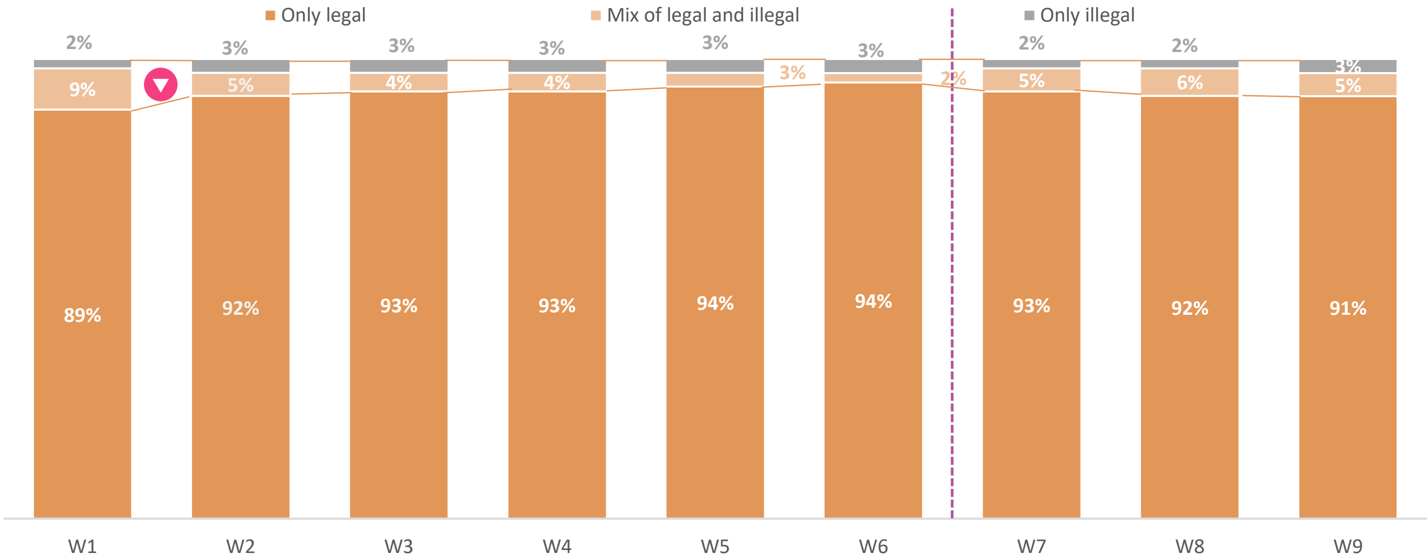
TV

STREAMING

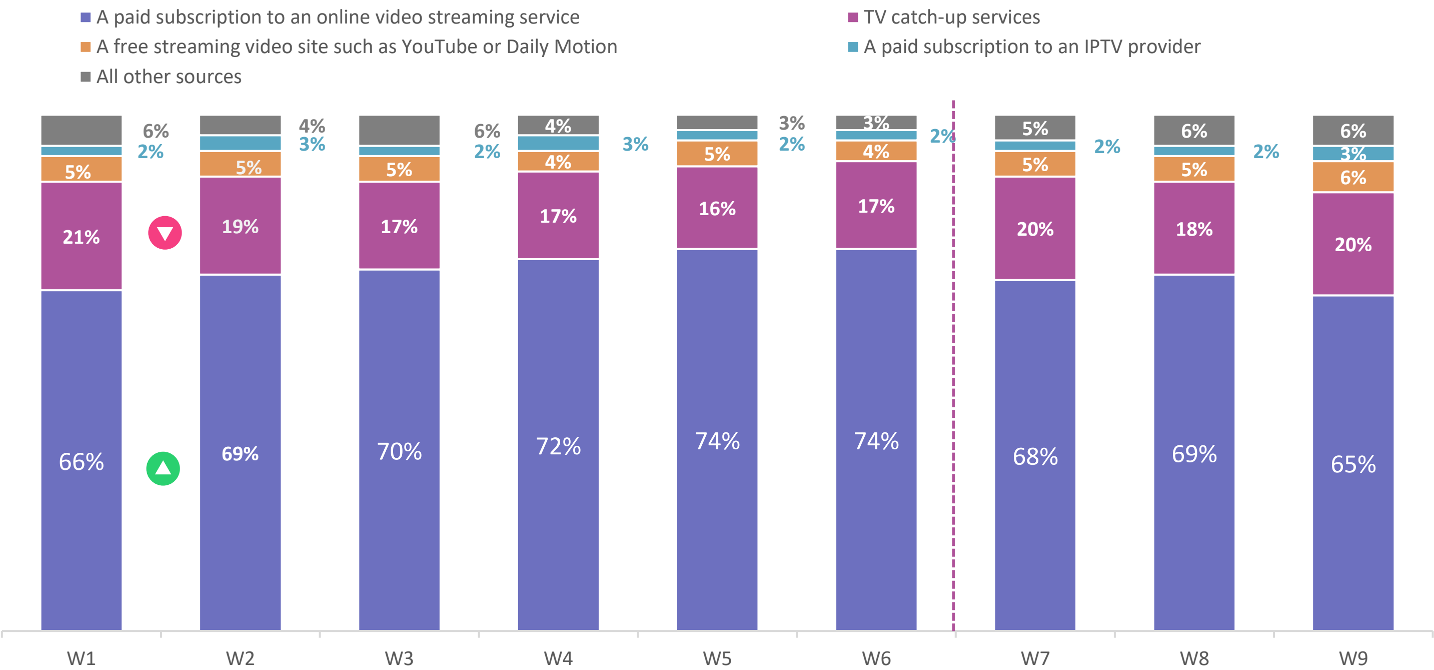
Median hours spent streaming in past week:
(or minutes per day)



Streaming sources:



Share of streaming across sources:



Base: Wave 9 – 'Median number of hours spent streaming, 'Streaming sources' and 'Share of streaming across sources' (Weekly TV streamers, n=544-546)

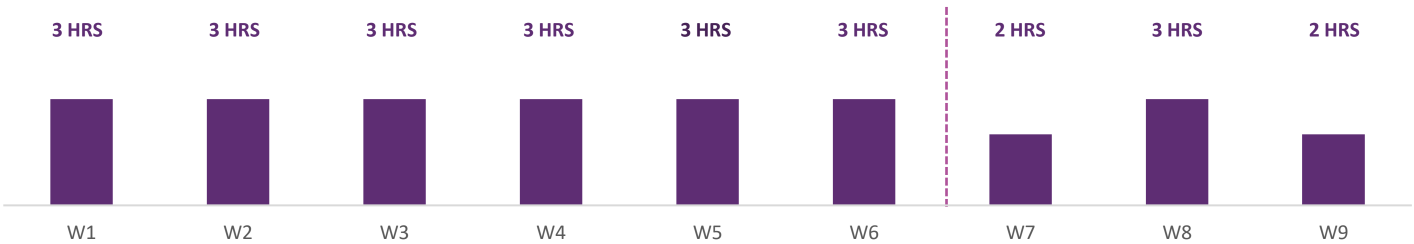
CATEGORY 04

Video Games

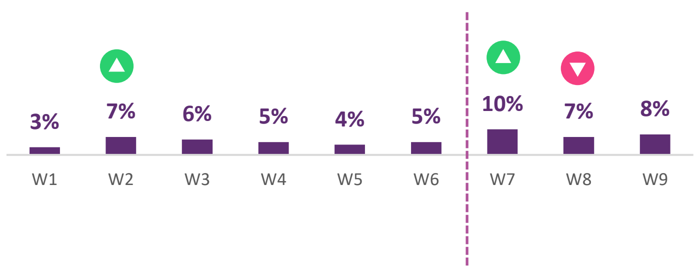
- Median hours spent playing video games returned to 2 hours per day, which was the same as in wave 7. In every other wave of the study it had been three hours.
- The proportion of respondents downloading/accessing video games, at 18%, was higher than the lockdown weeks of the study (it had ranged between 11-17% in waves 1-6). It was also 3% lower than the peak in wave 7.
- The median number of games downloaded/accessed in the past week fell to 1 after having been 2 in all previous waves of the study, other than wave 7 where it had also been 1.
- The proportion using partly or wholly illegal downloading/accessing sources, at 5%, was 9% lower than it had been in the previous wave and at its lowest point throughout the whole study.
- "Downloading video games for free" remained the most used method of downloading/accessing at 49% which was 5% higher than what it had been in the previous two waves. "Paying a single fee to download individual video games" remained in second place with 32%, which was in the middle of what it had been in the previous two waves (27% in wave 8 and 36% in wave 7) but was higher than the preceding five waves of the lockdown weeks of the study where it had been between 21-28%.
- The proportion of respondents purchasing physical copies, at 8%, was 1% higher than the previous wave and was just above the previous peak during the lockdown weeks of the study (wave 2).
- The median amount spent on "paying a single fee to download individual video games", remained unchanged at £15 and was in the middle of what it had been in the previous waves (between £10 and £20).

DOWNLOADING/ACCESSING

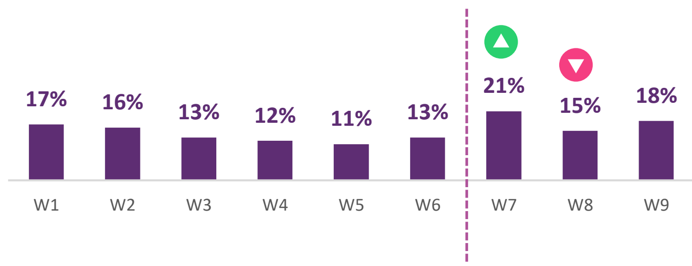
Median time spent playing video games each day:



Physical purchasing activity:

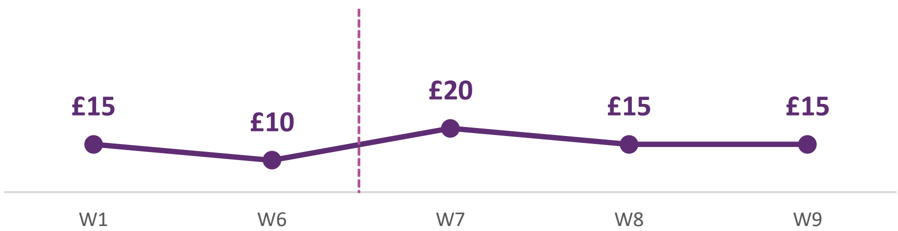


Downloading/accessing activity:



Median amount spent each month on:

Paying a single fee to download individual video games through services such as the Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc.

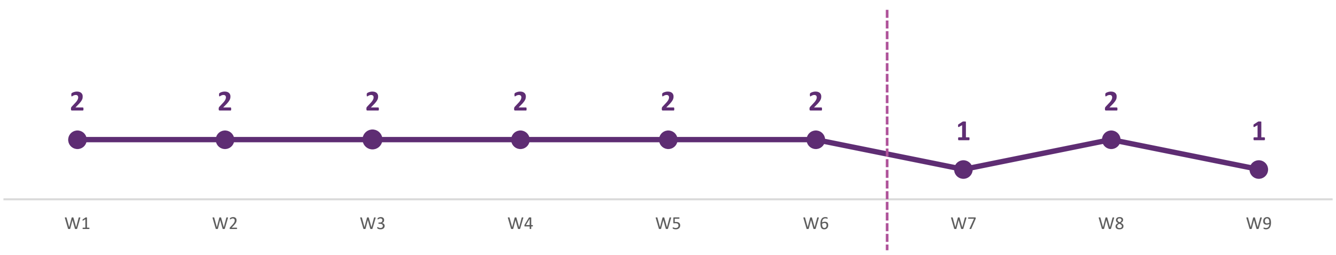


Base: Wave 9 – 'Median hours spent downloading/accessing in past week' (played games in past week in any format n=378), 'Downloading/accessing activity', 'Physical purchasing' (Total sample, n=1,000), 'Median amount spent each month' (have 'Paid a single fee to download individual video games' n=66)

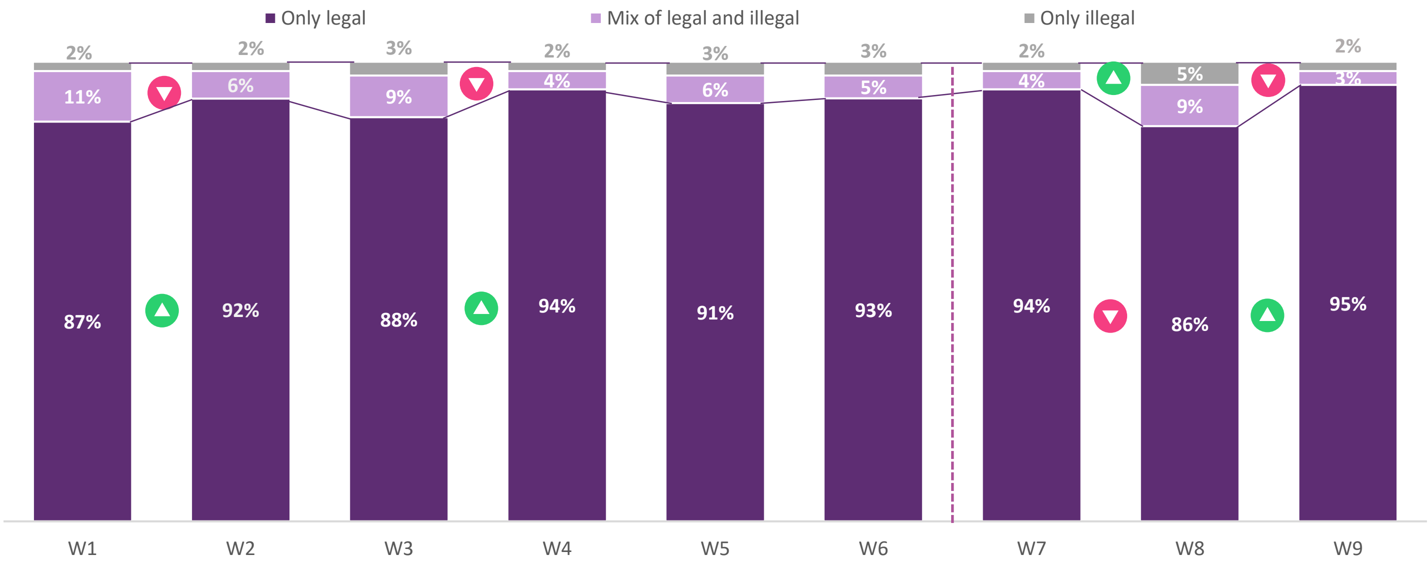
CATEGORY 04

Video Games

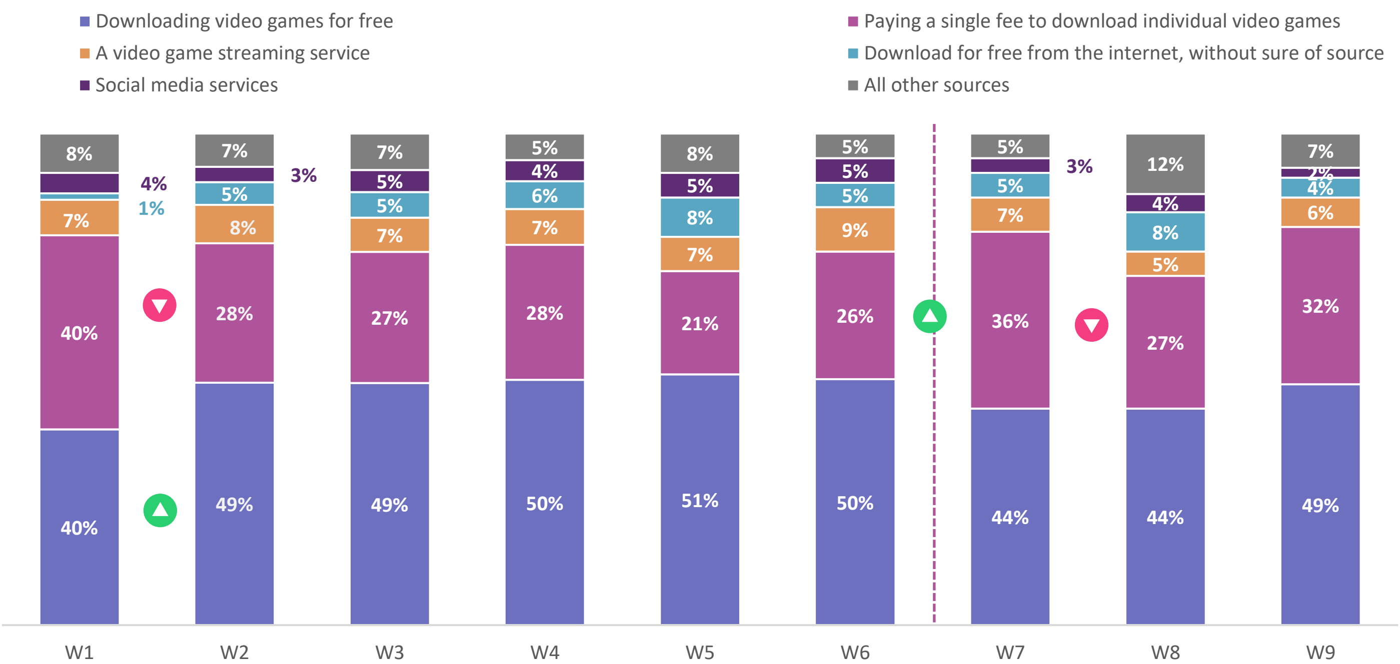
Median number downloaded/accessed in past week:



Downloading/accessing sources:



Share of downloading/accessing across sources:



CATEGORY 05

E-publishing

- Median hours spent reading books (either online or offline) fell to 1.75 hours after having been 2 hours in all other waves of the study.
- The time spent listening to audiobooks was, at two hours per day, unchanged from the previous 7 waves of the research.
- Time spent reading magazines each day was 45 minutes. This was consistent with the previous waves of the study where it had ranged between 40 minutes-1 hour.

E-BOOKS

- The proportion of respondents downloading/accessing e-books, at 16%, was broadly unchanged from the previous two waves (17-18%) but remained higher than it had been in the last four waves of the study which took place during lockdown (11-14%).
- The number of e-books downloaded/accessed remained unchanged at 2 from the previous wave, which is what it had been in all but one of the previous waves of the study before that.
- The proportion using partly or wholly illegal downloading/accessing sources, at 15%, was in line with the previous two waves of the study (where it had been between 13-15%) and with the lockdown weeks of the study, where it had been between 10-18%.
- “Paying a single fee to access e-books” remained the most popular source of downloading/accessing e-books at 50% and was followed, by some way, by those who “pay for a subscription service” at 15%.
- The proportion of respondents purchasing physical copies, at 16%, was 1% higher than the previous wave and was above all of the lockdown weeks of the study.

DIGITAL MAGAZINES

- The proportion of respondents downloading/accessing digital magazines, at 7%, was in line with the previous waves of the study, where it had ranged between 6-9%.
- The number of digital magazines downloaded/accessed, at 2, was unchanged from all but one of the previous waves of the study (wave 5 where it had been 1).
- The proportion using partly or wholly illegal sources for downloading or accessing digital magazines, at 15%, was almost half of what it had been in the previous wave (32%) and near the previous lowest point in the study (13% in wave 5).
- “Paying for a subscription service” and “accessing content made available for free by publishers” continued to be the top two ways in which content is accessed, with 33% and 26% shares, respectively. They were followed by “paying a single fee to download or read individual issues”, at 15%.
- The proportion of respondents purchasing physical copies of magazines, at 19%, was 3% higher than the previous wave and was above all of the lockdown weeks of the study.

AUDIOBOOKS

- The proportion of respondents downloading/accessing audiobooks, at 5%, was in line with the previous waves of the study where it had ranged between 4-7%.
- The number of audiobooks downloaded increased to 2 after having been 1 in every previous wave of the study.
- The proportion using partly or wholly illegal downloading/accessing sources, at 17%, was 7% lower the previous wave and in the middle of what it had been during the lockdown waves of the study where it had been between 12-27%.
- “Paying for a subscription service” (37%) was the top source of accessing/downloading audiobooks and was 8% higher than the previous wave. It was followed by “paying a single fee” at 29%. The share of titles accessed from a “library”, at 10%, was 3% lower than wave 8 and 9% lower than wave 7, but remained above what it had been during the lockdown weeks of the study.
- The proportion of respondents purchasing physical copies, at 4%, was unchanged from the previous two waves and was in line with most of the lockdown weeks of the study.

E-publishing

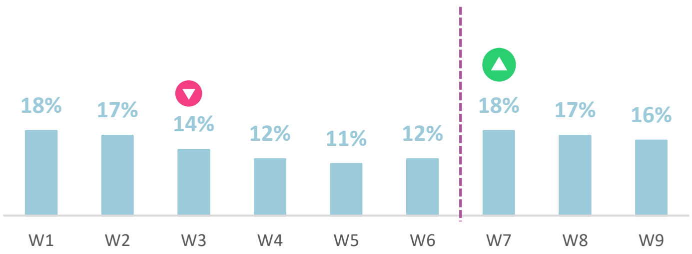
CONSUMPTION

Median time spent reading/listening in <u>any</u> format (i.e. online or offline) each day:

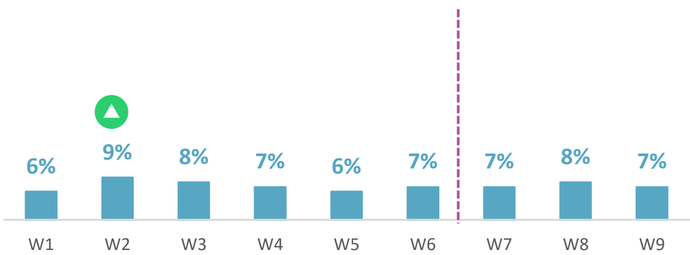
	W1	W2	W3	W4	W5	W6	W7	W8	W9
Books	2 HRS	2 HRS	2 HRS	2 HRS	2 HRS	2 HRS	2 HRS	2 HRS	1.75 HRS
Magazines	1 HR	1 HR	1 HR	1 HR	40 MINS	40 MINS	1 HR	1 HR	45 MINS
Audiobooks	1 HRS	2 HRS	2 HRS	2 HRS	2 HRS	2 HRS	2 HRS	2 HRS	2 HRS

Downloading/accessing activity:

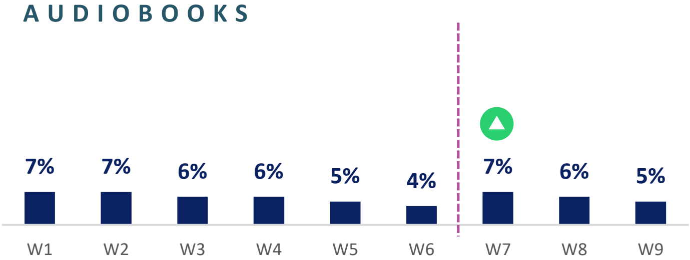
E-BOOKS



DIGITAL MAGAZINES

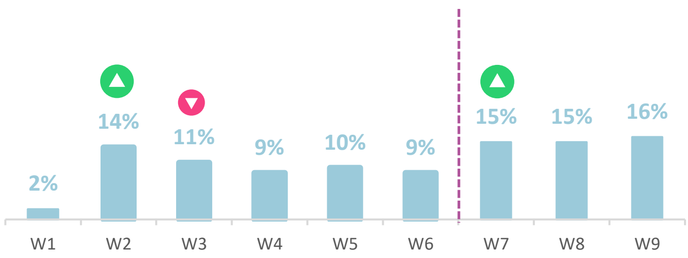


AUDIOBOOKS

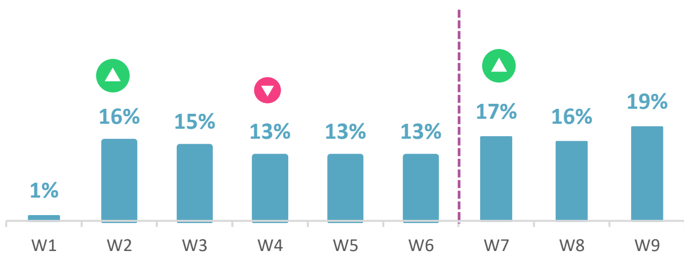


Physical purchasing activity:

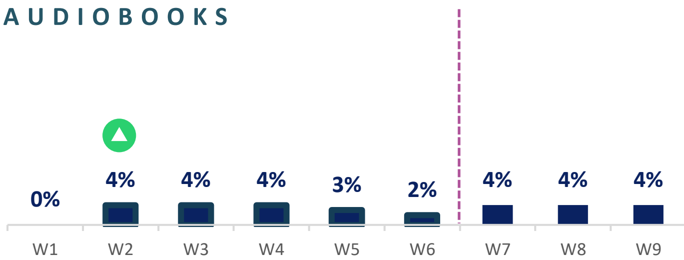
BOOKS



MAGAZINES



AUDIOBOOKS



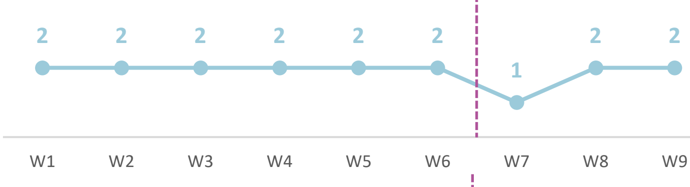
Base: Wave 9 – 'Median time spent reading/listening each day' (E-books n=472, Digital magazines n=231, Audiobooks n=78), 'Downloading/accessing activity', 'Physical purchasing' (Total sample, n=1,000)

CATEGORY 05

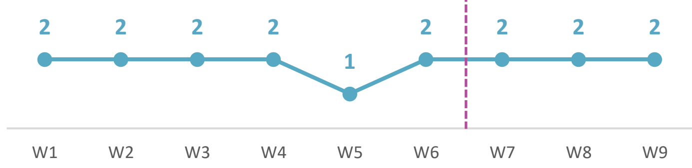
E-publishing

Number of publications downloaded/accessed:

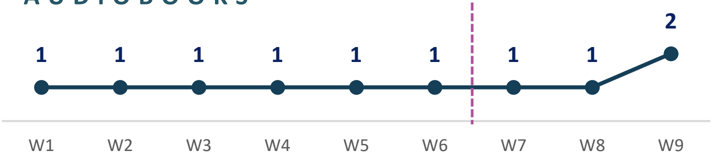
E-BOOKS



DIGITAL MAGAZINES



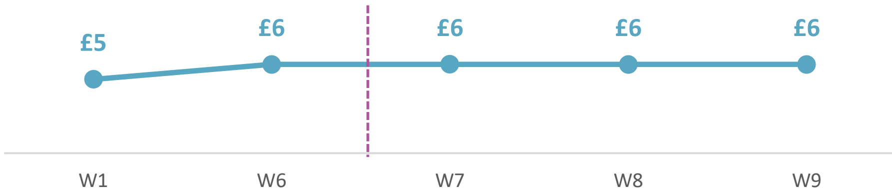
AUDIOBOOKS



Median amount spent each month:

E-BOOKS

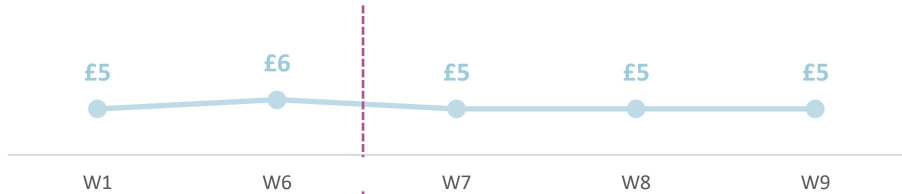
Paying a single fee to download individual e-books through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks.com etc.



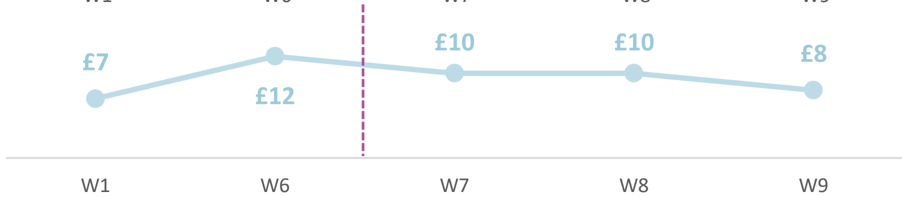
Pay for a subscription to a service that allows you download or read e-books online (e.g. Kindle Unlimited, Scribd etc.)

DIGITAL MAGAZINES

Paying a single fee to download or read individual issues of digital magazines through services such as the Mags Direct, Newsstand.co.uk or Zinio

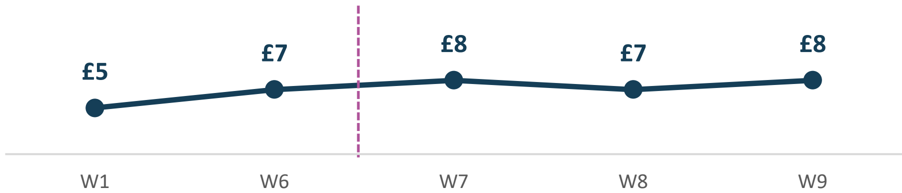


Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines

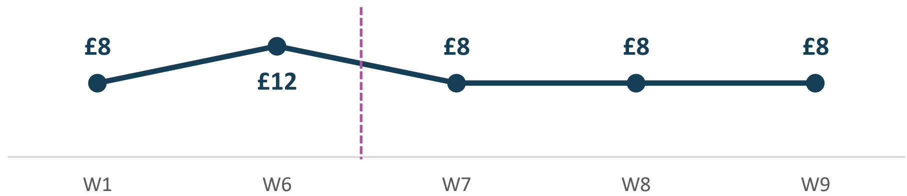


AUDIOBOOKS

Paying a single fee to download audiobooks through services such as the Audible, Apple etc.



Pay for a subscription to a service that allows you listen to Audiobooks online (subscription to Audible, Scribd etc.)

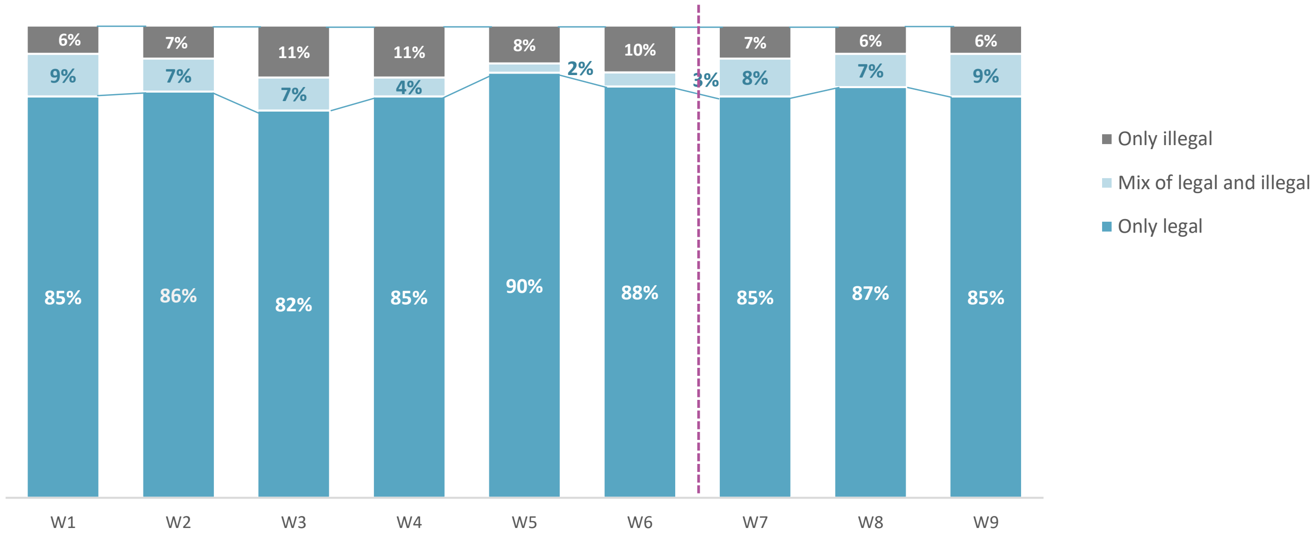


Base: Wave 9 – 'Number of publications downloaded/accessed' (Weekly E-book consumers n=154, Weekly Digital magazine consumers n=70, Weekly Audiobook consumers n=57), Median amount spent each month (Weekly users of sources of paid e-book n=30-93, Digital magazines n=17-29, Audiobooks n=19-25)

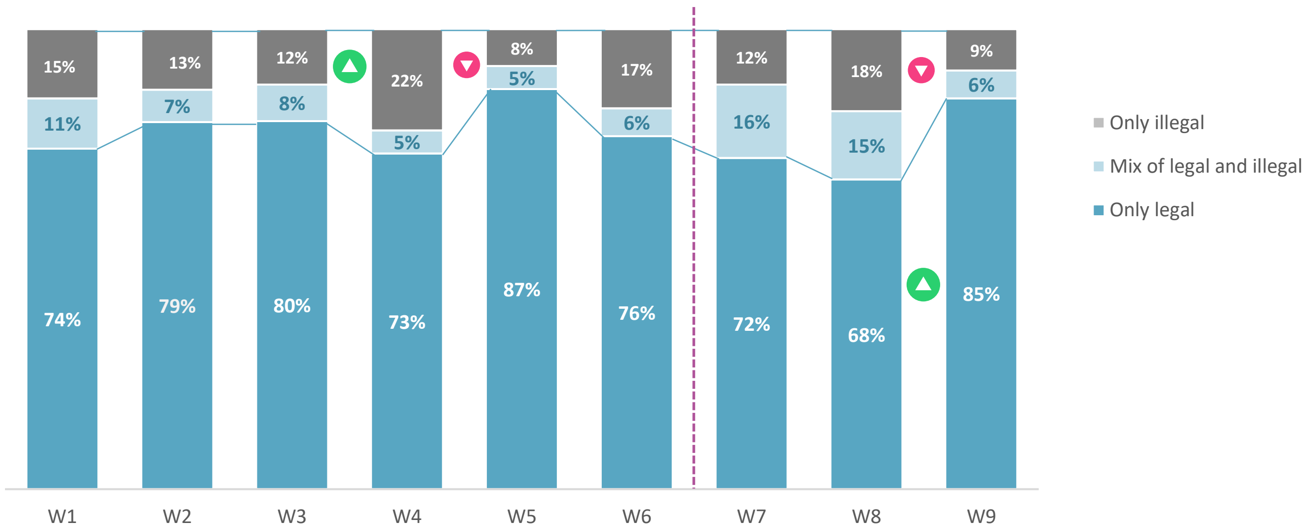
E-publishing

Legality of sources:

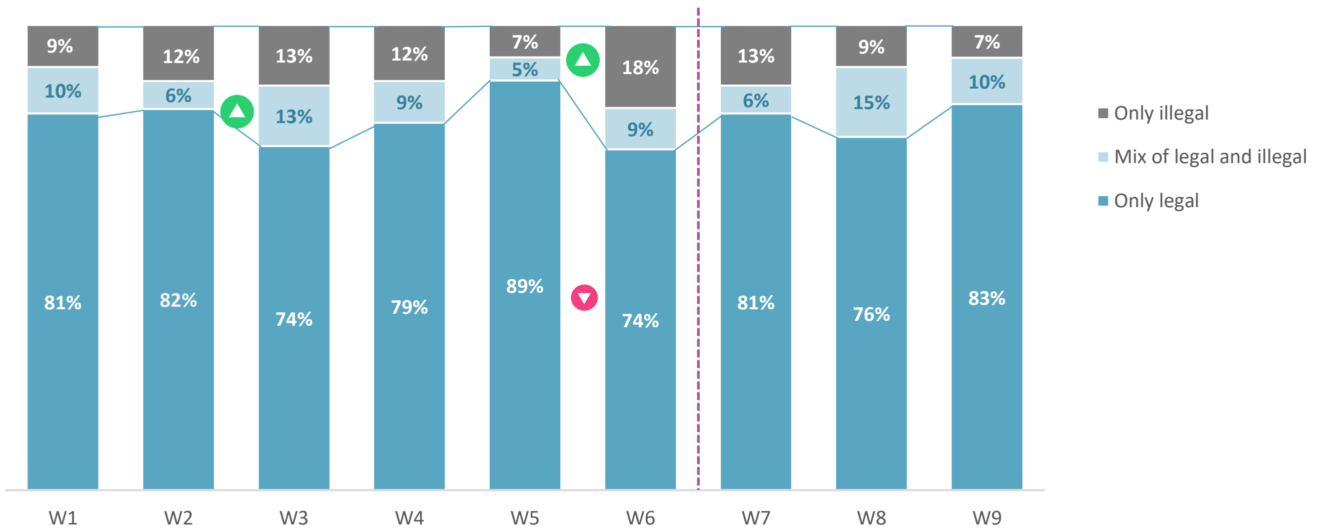
E-BOOKS



DIGITAL MAGAZINES



AUDIOBOOKS

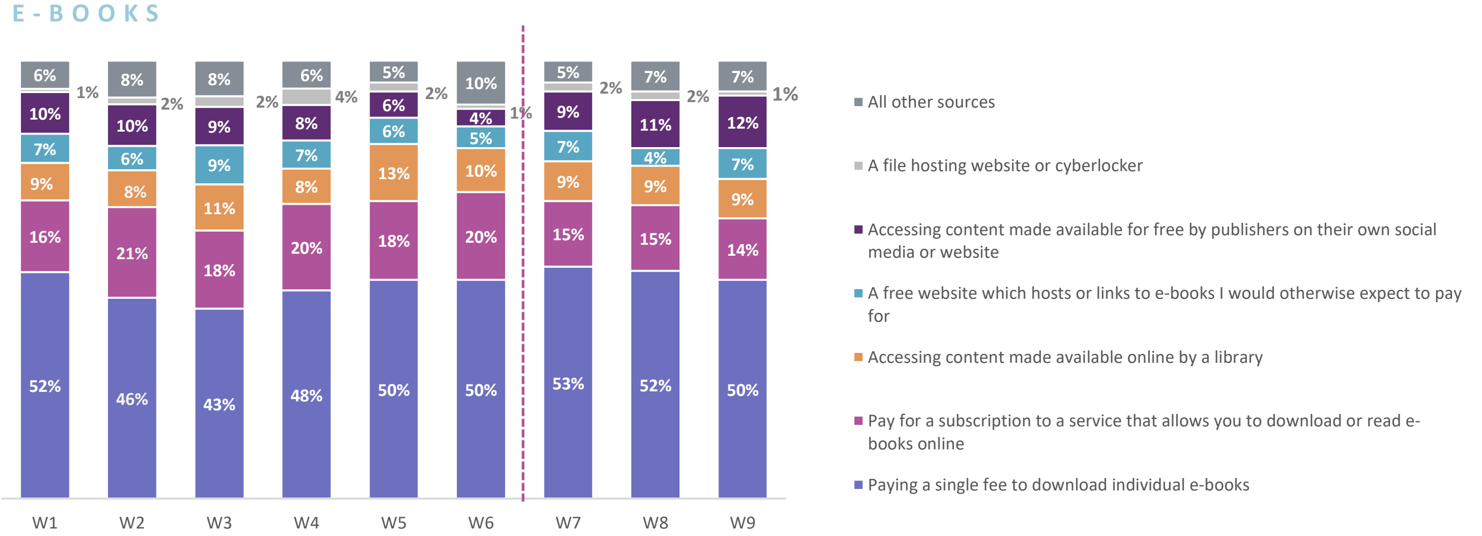


CATEGORY 05

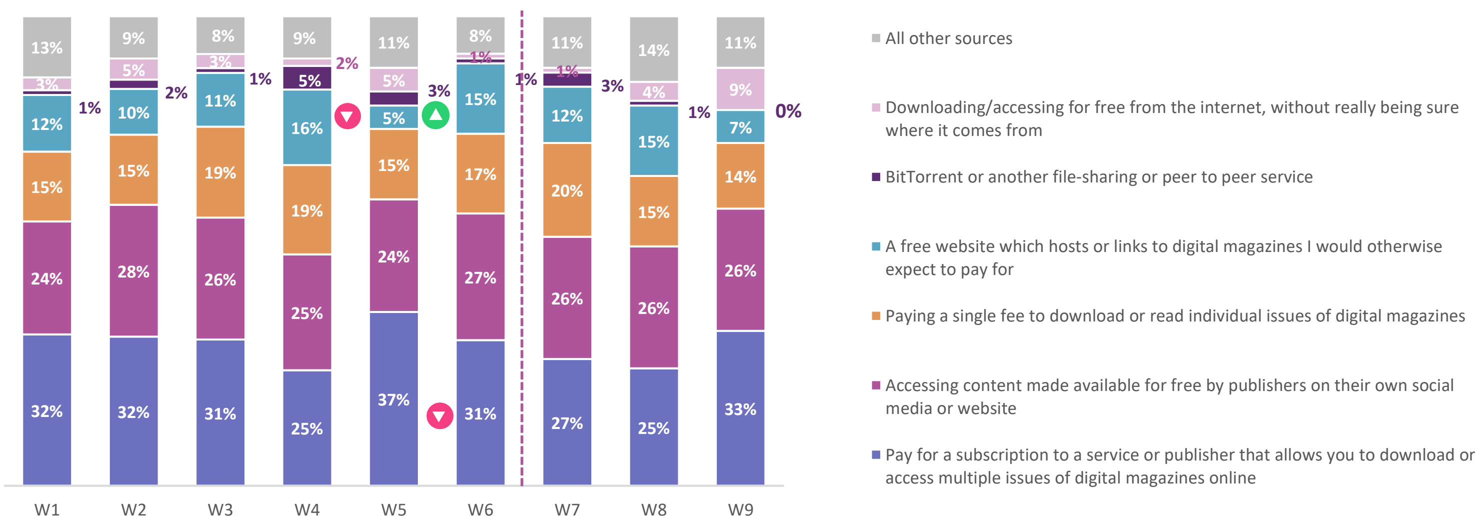
E-publishing

Share of downloading/accessing across sources:

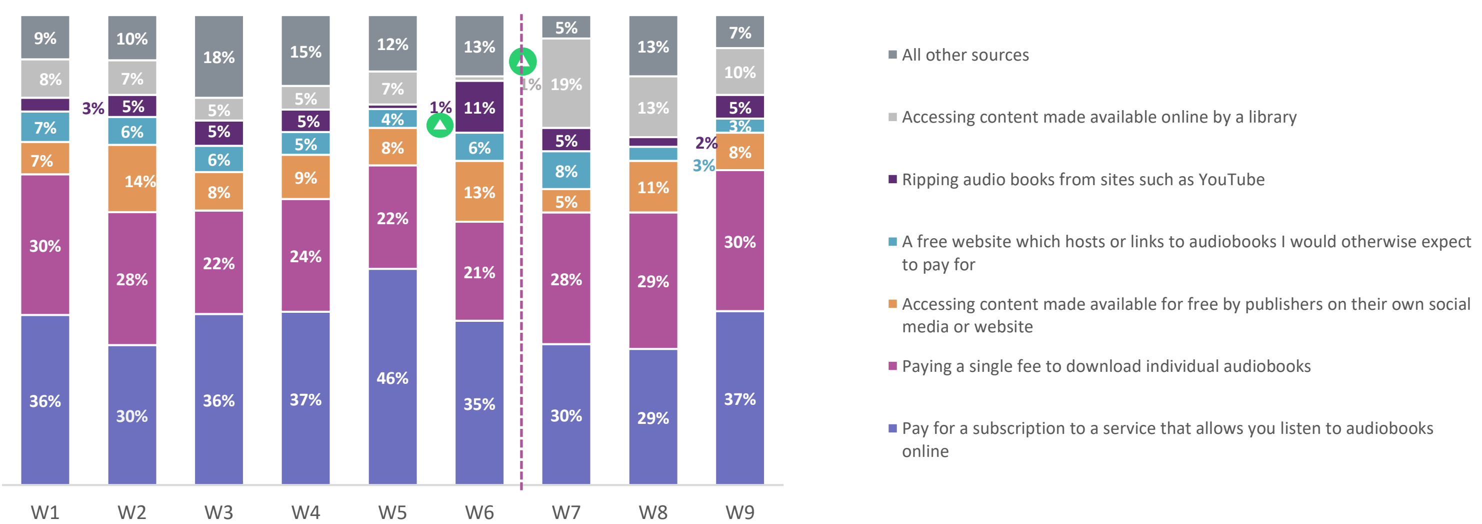
E-BOOKS



DIGITAL MAGAZINES



AUDIOBOOKS



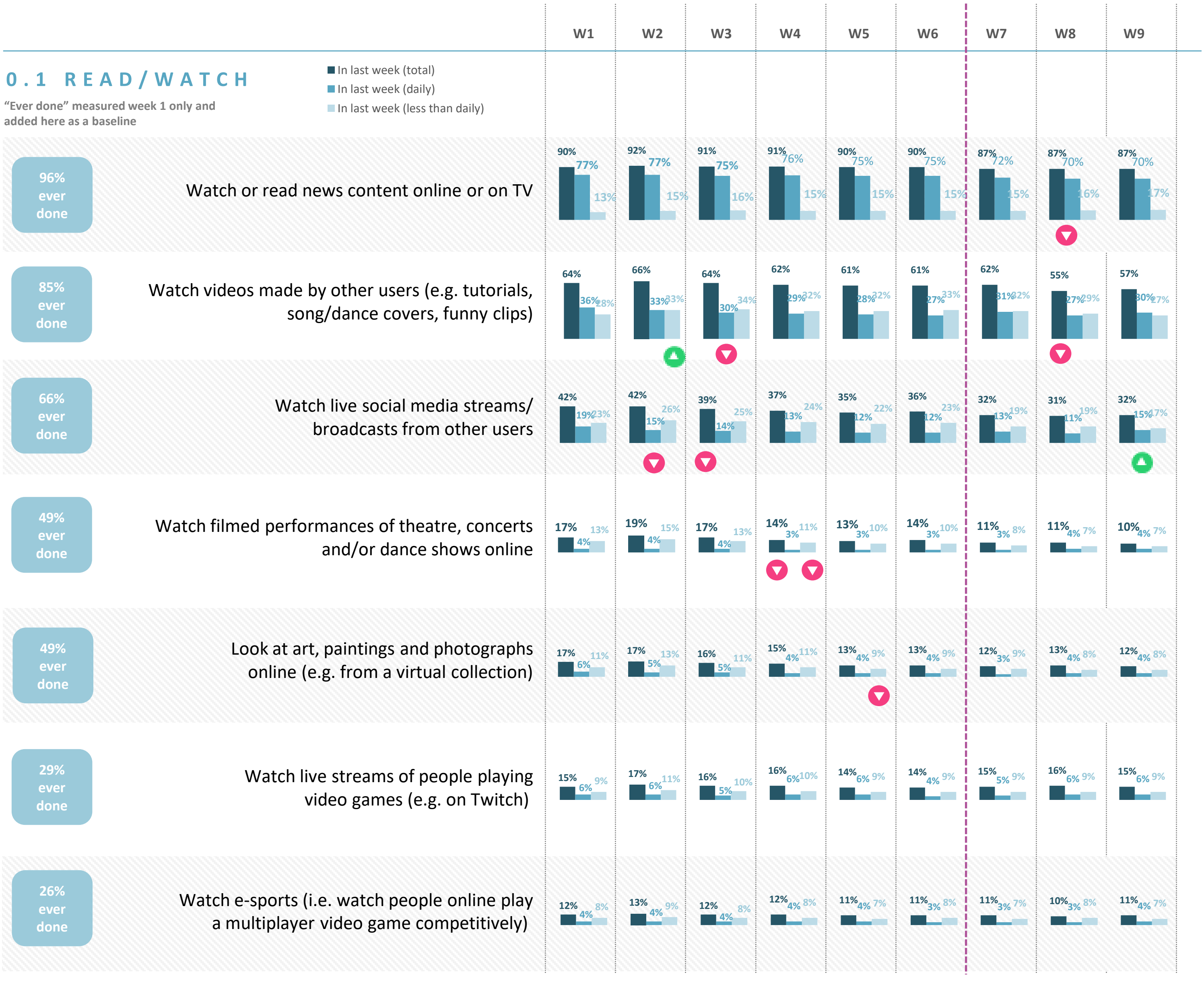
Other content consumption

Most categories remained stable compared with the previous two waves of the study which took place after lockdown restrictions were relaxed. Some key changes between the current and previous waves were:

- There was a jump in conducting work meetings via video software, with those who had done it at least once a week increasing by 6% to 31%, to be at the highest point it had been during the study.
- Those taking part in online fitness classes at least once a week fell by 4% to 12%, which was the lowest point it had been during the study (10% lower than the peak in weeks 1 and 2).

Categories relating to playing or watching people play video games or e-sports continued to be resilient with the proportion doing so daily remaining consistent throughout all weeks of the study (i.e. both in lockdown and since it ended).

Cultural consumption relating to watching filmed performances (e.g. theatre, concerts) or looking at art and paintings online were both unchanged from the previous week (-1% decreases). In both instances they were below the higher levels that were seen during the earlier lockdown weeks of the study (watching filmed performances was 9% below the peak in week 2 while looking at art and paintings online was 5% below the peak in weeks 1-2).



Other content consumption

0.2 INTERACT WORK/SOCIAL

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

		W1	W2	W3	W4	W5	W6	W7	W8	W9
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%	69% / 45% / 24%	66% / 44% / 22%	66% / 46% / 20%	64% / 43% / 21%	64% / 45% / 19%
Use video software for social activities with friends/family	68% ever done	51% / 19% / 33%	54% / 17% / 36%	53% / 16% / 38%	52% / 14% / 37%	51% / 14% / 37%	49% / 15% / 35%	41% / 12% / 29%	37% / 11% / 26%	38% / 13% / 25%
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%	36% / 20% / 16%	37% / 19% / 18%	35% / 20% / 15%	35% / 18% / 16%	35% / 19% / 16%
Conduct work meetings via video software	38% ever done	26% / 10% / 15%	27% / 10% / 16%	28% / 11% / 17%	27% / 11% / 17%	28% / 10% / 18%	27% / 11% / 16%	25% / 10% / 15%	25% / 10% / 16%	31% / 13% / 19%

0.3 ACTIVELY PARTICIPATE

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

		W1	W2	W3	W4	W5	W6	W7	W8	W9
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%	27% / 10% / 17%	26% / 9% / 17%	24% / 9% / 15%	22% / 7% / 16%	24% / 8% / 15%
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%	20% / 9% / 10%	19% / 9% / 10%	23% / 10% / 13%	22% / 11% / 10%	23% / 12% / 11%
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%	19% / 6% / 13%	18% / 7% / 12%	14% / 3% / 11%	16% / 4% / 13%	12% / 4% / 8%

0.4 CREATE/SHARE

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

		W1	W2	W3	W4	W5	W6	W7	W8	W9
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%	34% / 11% / 23%	33% / 10% / 23%	30% / 11% / 19%	26% / 9% / 17%	18% / 6% / 12%
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%	24% / 6% / 19%	24% / 7% / 17%	20% / 6% / 14%	20% / 6% / 14%	18% / 6% / 12%
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%	11% / 4% / 7%	10% / 4% / 7%	9% / 3% / 7%	11% / 3% / 8%	10% / 3% / 7%

Other content consumption

0.5 LISTEN

"Ever done" measured week 7 and added here as a baseline

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

Ever done	Activity	W1	W2	W3	W4	W5	W6	W7	W8	W9
58% ever done	Listen to the radio online (e.g. BBC Sounds)						35% / 14% / 20%	38% / 15% / 23%	36% / 17% / 19%	36% / 17% / 19%
70% ever done	Listen to the radio offline (e.g. DAB, radio receiver, through TV)						46% / 27% / 19%	51% / 30% / 21%	51% / 30% / 21%	49% / 27% / 21%
48% ever done	Listen to podcasts (e.g. Serial, The Joe Rogan Experience)						24% / 8% / 17%	24% / 8% / 16%	25% / 8% / 17%	24% / 8% / 17%

Local lockdowns

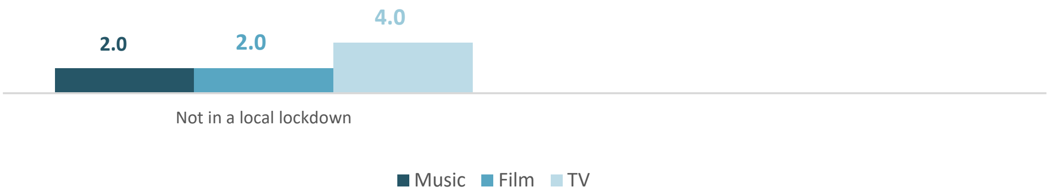
Throughout the period in which waves 7 to 9 were taking place some parts of the UK were in local lockdowns at various points. For example, parts of Leicester were in lockdown for the entirety of this time while large parts of the North of England had restrictions put in place in August and Birmingham experienced restrictions in September. [See T1 on page 27 for list of areas]

By comparing the changes in content consumption over these successive waves by individuals in areas of lockdown with those for individuals not in lockdown we get insights into the impact lockdown has on consumption levels.

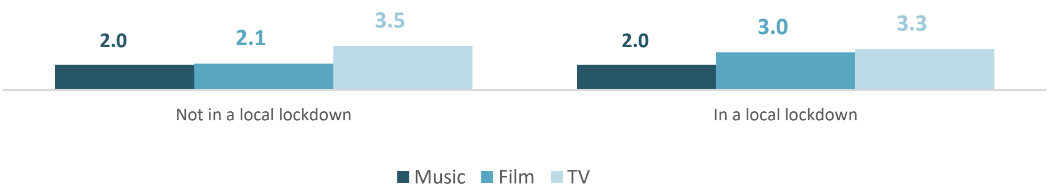
The Figure below charts the median time spent by individuals consuming music, film and TV. It does this only for those individuals who completed the questionnaire in each wave, increasing the precision of comparisons between waves. The Figure shows that, in England, there were increases in median consumption over successive waves for film and TV in the case of individuals moving into lockdown but that median consumption did not change significantly in the case of individuals out of lockdown. Notwithstanding the limited sample sizes, this finding is highly suggestive that on average individuals increase their consumption of film and TV as a result of being in lockdown

Median time (hours) spent consuming content in <u>any</u> format (i.e. online or offline) each day in England:

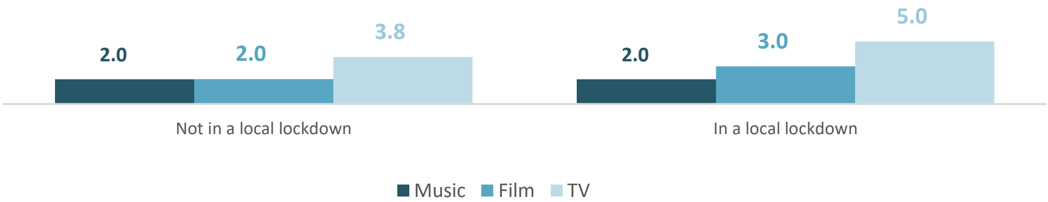
Wave 7 (asking about the 6th – 12th July)



Wave 8 (asking about the 3rd – 9th August)



Wave 9 (asking about the 14th – 20th Sept)



Base: Those taking part in every wave (i.e. waves 1-9) in England and consumers in a category – wave 7 (music = 308, film = 276, TV = 340), wave 8 and not in a local lockdown (music = 273, film = 220, TV = 300), wave 8 and in a local lockdown (music = 27, film = 19, TV = 28), wave 9 and not in a local lockdown (music = 278, film = 217, TV = 305), wave 9 and in a local lockdown (music = 33, film = 28, TV = 37)

Local lockdowns

T1. Areas in England in a local lockdown in the time periods waves 7-9 were asking about

Local authority (name)	In lockdown for wave 7	In lockdown for wave 8	In lockdown for wave 9
Leicester (various postcodes)	Yes	Yes	Yes
Blackburn with Darwen Borough Council	No	Yes	Yes
Bradford Council	No	Yes	Yes
Burnley Brough Council	No	Yes	No
Hyndburn Borogh Council	No	Yes	No
Pendle Borogh Council	No	Yes	Yes
Rossendale Borogh Council	No	Yes	No
Calderdale Metropolitan Borogh Council	No	Yes	No
Kirklees Metropolitan Council	No	Yes	No
Bolton Metropolitan Borogh Council	No	Yes	Yes
Bury Metropolitan Borogh Council	No	Yes	Yes
Manchester City Council	No	Yes	Yes
Oldham Metropolitan Borogh Council	No	Yes	Yes
Rochdale Borough Council	No	Yes	Yes
Salford City Council	No	Yes	Yes
Stockport Metropolitan Borough Council	No	Yes	No
Tameside Metropolitan Borough Council	No	Yes	Yes
Trafford Metropolitan Borough Council	No	Yes	Yes
Wigan Metroplitan Borough Council	No	Yes	No
Preston City Council	No	No	Yes
Birmingham	No	No	Yes
Sandwell	No	No	Yes
Solihull	No	No	Yes
Durhmam	No	No	Yes
Gateshead	No	No	Yes
Newcastle	No	No	Yes
Northumberland	No	No	Yes
North Tyneside	No	No	Yes
South Tyneside	No	No	Yes
Sunderland	No	No	Yes

Digital Culture -
Consumer Tracking Study

WAVE 7 | AUGUST 2020

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