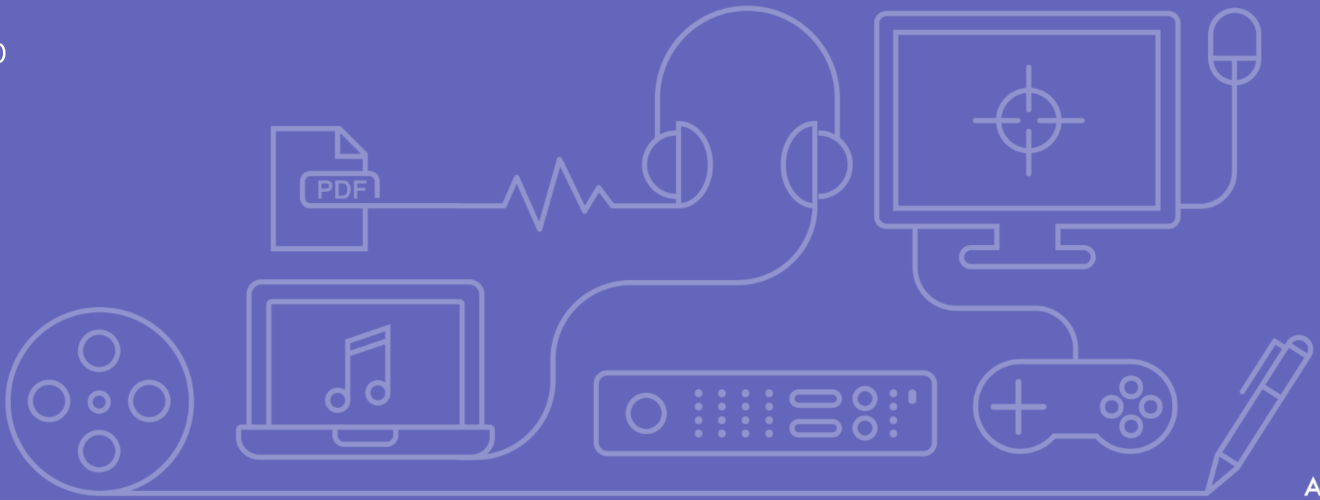
Creative Industries
Policy & Evidence Centre
Led by nesta

Intellectual Property Office

Digital Culture -
Consumer Tracking Study

Wave 1 of 6 | April 2020



AUDIENCE NET

Contents

Section 01

Methodology & Sample

Broadly, the study seeks to:

01

Uncover if/how factors such as movement restrictions leading to more time in the home, the mental wellbeing consequences of social distancing and the economic effects of the crisis are impacting consumption habits.

02

Provide industries with a detailed understanding of consumer needs in relation to their content, so as to help minimise negative consequences (e.g. increased infringement) and offer insight into new opportunities and ways of engaging with consumers during this period, and beyond.

Detailed methodology

The Creative Industries Policy and Evidence Centre (PEC) and the IPO commissioned AudienceNet to design and conduct a weekly nationally representative panel survey of 1000+ consumers aged 16+ on how they engage with digital cultural content in the home. As well as asking many questions drawn from the IPO's Online Copyright Infringement (OCI) Tracker, conducted on 9 occasions since 2010, the survey asks respondents questions about time spent engaging with each content category, and about the wellbeing and other impacts of the COVID-19 crisis.

The main focus of the study is on five content categories:

- Music
- Films
- TV
- Video games
- E-publishing

Fieldwork is being conducted each week. To ensure that we are able to capture fluctuations in consumption that may occur due to COVID-19 (e.g. government interventions and restrictions being announced), all respondents are asked to report on the same 7-day period (i.e. Monday-Sunday the week before).

Number of waves: N=6

Survey length: Wave 1: 10 minutes, Waves 2-6: 5-7 minutes

Sample:

- Nat Rep of UK 16+ population
- N=1000 respondents to complete all 6 waves
- Per wave = 1000+ (to ensure a minimum of N=1000 complete all 6 waves)
- Wave 1 fieldwork period was longer to facilitate recruitment.

Fieldwork taking place throughout April/May 2020.

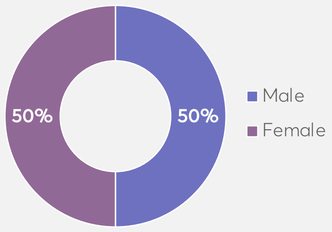
Research respondents sourced through AudienceNet's network of professionally managed, ESOMAR compliant, online UK consumer research panels.

Sample breakdown

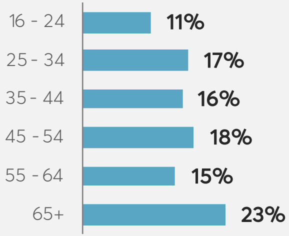
Nationally representative of the UK population. Wave 1 Fieldwork dates: **09/04/2020 - 19/04/2020**

N=3,863 (Wave 1)

Gender



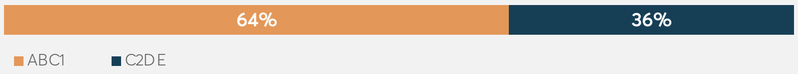
Age



Region

North East	4%
North West	11%
Yorkshire and The Humber	8%
East Midlands	7%
West Midlands	9%
East	9%
London	13%
South East	14%
South West	9%
Wales	5%
Scotland	8%
Northern Ireland	3%

Social grade



Navigating this report

This report covers each of the content categories in detail, looking specifically at those who consume them (i.e. not the total population).

Where relevant, data from the 2019 OCI study is included in this Wave 1 report to provide industry context. The main OCI study focuses on three month consumption as opposed to weekly. As such, in Wave 1 of this study, we also captured three month data to help contextualize the wave-on-wave results. Comparisons can be made between the three month data points captured in the 2019 OCI and in Wave 1 to some extent, however the weekly data can not be compared in a like-for-like way due to the time-frame being much different. Furthermore, some of the differences between the 2019 OCI and Wave 1 three month data points are likely to be explained by updates to the questionnaire (e.g. new categories being included), which will be investigated in detail in the 2020 OCI report.

The main focus of this study (and the analysis included within this report), therefore, is on the weekly tracking of relevant data points.

INTERPRETING THE DATA:

- **Rounding:** Where (single choice) question percentages do not add up to 100%, this is due to rounding of the data.
- **Base sizes:** Where base sizes are below N=30, results must be interpreted with caution.
- For the **share of access** (by source) questions, any sources with 3% or below are grouped into “All other sources”.
- **Margin of error:** With any piece of research, it is almost never feasible to measure the entire population and thus achieve results that are 100% accurate. We must, therefore, take into account the potential for error. As a guide, based on our sample size, we advise caution when interpreting results that have less than a (-/+) 3/4 % difference.
- When comparing results between future waves, only those with that are significant at a **95% confidence interval** will be highlighted in the analysis.

Navigating this report

INFRINGEMENT FIGURES:

Infringement figures are based on the number of people who had used at least one illegal source. Respondents' infringement behaviours are first grouped into one of three three categories:

- Use of only legal sources
- Use of only illegal sources
- Use of a mix of legal and illegal sources

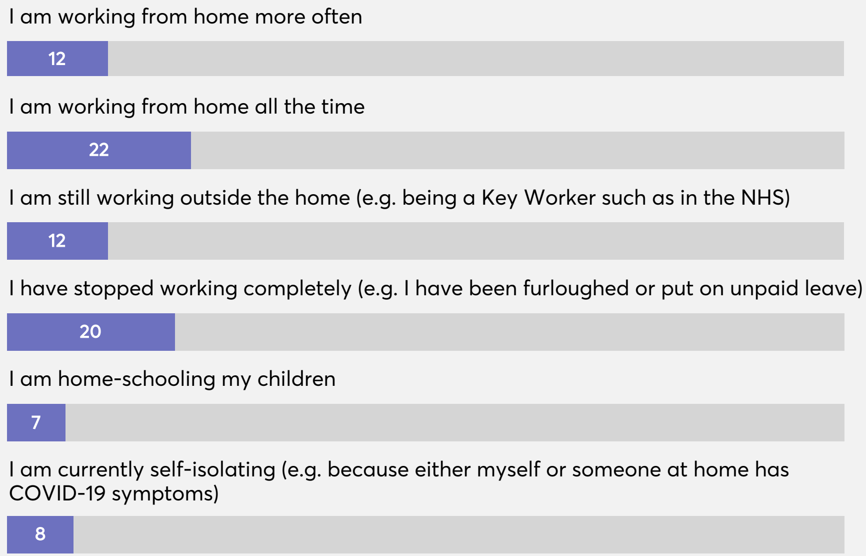
Total infringement = those who only use "illegal sources" + those who use a "mix of legal and illegal sources".

We take a **less direct** approach to finding out whether illegal sources are used, in order to encourage more honesty. More specifically, rather than asking this outright, respondents are shown a list of options and the classification of legal vs. illegal is done based on the options chosen.

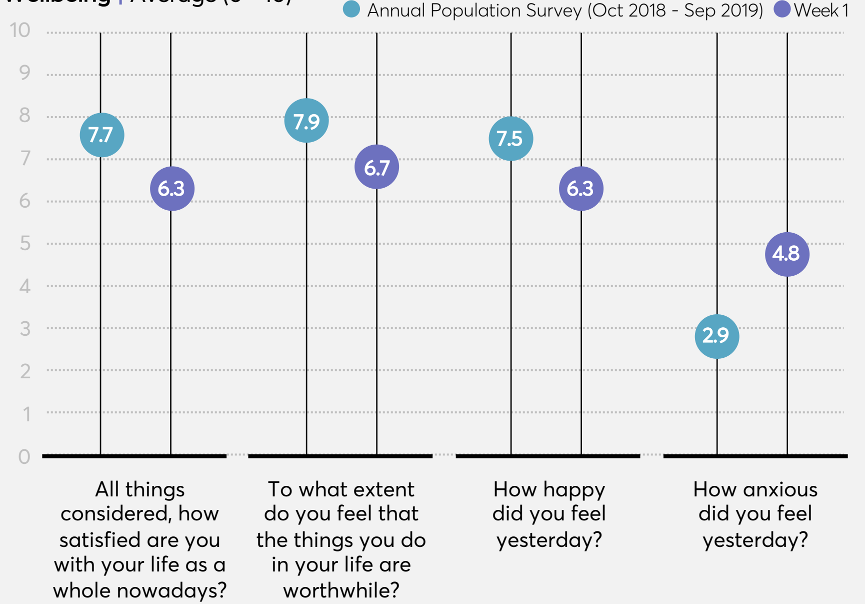
Although the list of sources is exhaustive, to reduce instances of the wrong source being selected and, thus, results being biased, for each category an option is included for those who may have been less familiar with the terminology. However, this category ("Download/access for free from the internet, without really being sure where it comes from") is not included within the overall calculations for legal or illegal. We also exclude from the base those who only consume content via this source.

Lifestyle & Wellbeing

Changes in work/lifestyle due to COVID-19 | Week 1



Wellbeing | Average (0 - 10)



Base: Total sample (n=3,863)

Section 02

Executive Summary

Executive Summary

- **20% had stopped working completely** since the COVID-19 pandemic, due to being furloughed, put on unpaid leave or no longer having work.
- **COVID-19 has had a notable impact on mental wellbeing**, with a drop in satisfaction and feelings of worth and happiness, while feelings anxiety have increased (with the biggest margin of change).
- The content categories covered all play an important role in **helping people deal with challenging life circumstances** such as COVID-19 and while relatively high for all content categories, the positive effect of music was especially notable, with 44% “strongly” agreeing.
- Consumers report **spending notable amounts of time consuming** cultural content each day, with the median amount from most categories being 3 hours or more.
- Some broad trends in consumption are similar to the OCI 2019 results, with **streaming remaining the dominant source** of access for music, film and TV. The use of illegal sources to access these content categories is also less prevalent for streaming than downloading.
- **Film and TV saw notable increases** in the number of people engaging with them (for both streaming and downloading) over a 3-month period, compared with OCI 2019 results. Figures for **video games** also suggest an increase since 2019.
- Consumers seem to be embracing a range of non-traditional content since the COVID-19 crisis has started. Those who had ever engaged with a content category were asked to compare their consumption now to pre the pandemic. For a number of categories, 1 in 5 or more reported to **only having taken up the activity since COVID-19**. This proportion was especially high for online fitness classes; the use of video conferencing for work; watching filmed performances of theatre, concerts and/or dance shows online; and looking at art, paintings and photographs online.

Executive Summary

MUSIC

- The median time spent listening to music each day was **3 hours**.
- **Streaming was the most common way of accessing music** (43%), and almost all (98%) of this consumption was via legal sources. The most commonly used source for streaming music was via a **"paid for subscription service"**, which accounted for half of listening.
- A quarter (23%) had downloaded music in the last week. The **use of illegal sources was notably higher among music downloaders** compared with streamers, with a third (33%) reporting to have used only illegal sources or a mix of legal and illegal.

FILM

- The median time spent watching films each day was **3 hours**.
- **Streaming was the most common way of accessing films** (46%), and the majority (86%) of this consumption was via **legal sources**. The most commonly used source for streaming films, by some way, was "a paid subscription to an online video streaming service (Netflix, Amazon Prime Video etc.)". This accounted for three quarters (73%) of streaming time.
- One in five (20%) had downloaded films in the last week. The use of **illegal sources (only illegal or a mixture) was slightly higher among film downloaders** compared with streamers, with three quarters using only legal sources.

Executive Summary

TV

- The median time spent watching TV each day was **4 hours**.
- **Streaming was the most common way of accessing TV** (42%), and the majority (89%) of this consumption was via **legal** sources. The most common way to stream TV was "a paid subscription to an online video streaming service (Netflix, Amazon Prime Video etc.)", and this accounted for two thirds (66%) of streaming time.
- 15% had downloaded TV shows in the last week. **The use of illegal sources was only slightly higher for downloading** compared to streaming - 82% reported only using legal sources to download. The most common method of downloading was via "a paid subscription to an online video streaming service (Netflix, Amazon Prime Video etc.)", which accounted for over half (55%) of downloading.

VIDEO GAMES

- The median time spent playing video games each day was **3 hours**.
- 17% had downloaded/accessed video games in the last week, with **most (87%) having used legal sources** only.
- The most common sources used to access video games were **"paying a single fee to download individual video games" and "downloading video games for free** through Apple App store, PlayStation etc.", each accounting for approximately 40% of downloads each.

Executive Summary

E-PUBLISHING

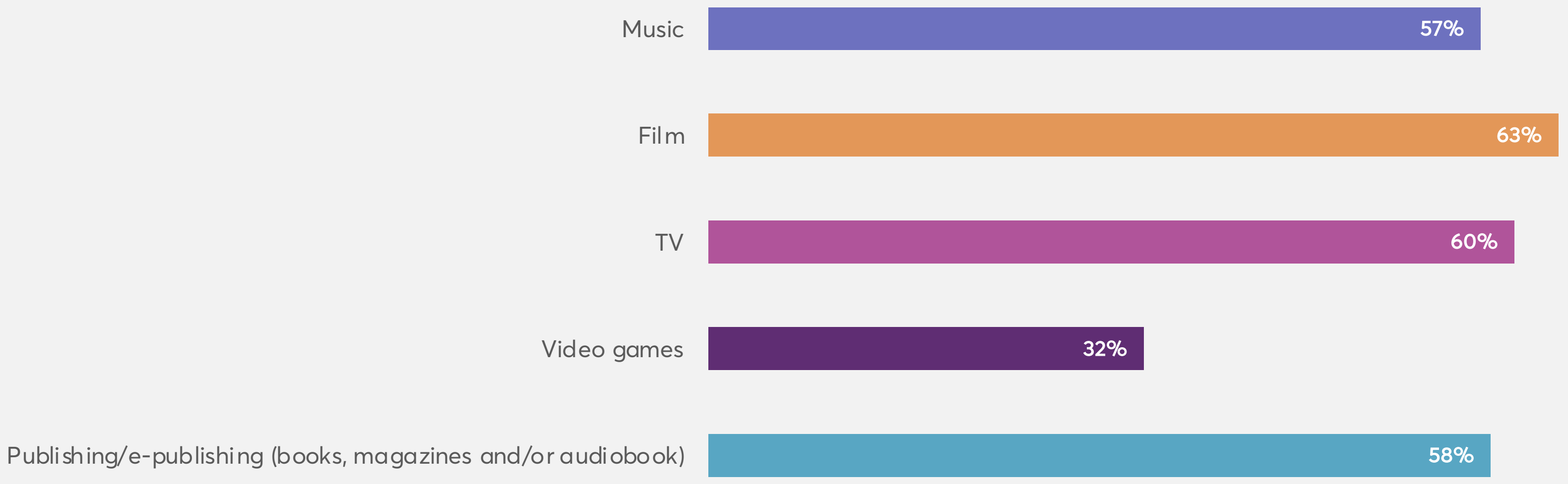
- The median time spent reading/listening each day was 2 **hours for books; 1 hour for magazines and 1 hours for audiobooks**.
- 18% had downloaded or accessed E-books in the last week. The **majority (85%) used legal only sources**, with "paying a single fee to download individual books" accounting for half of downloading (51%).
- 6% had downloaded or accessed digital magazines in the last week. **Three quarters (74%) had used only legal sources**, with paying "...for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online" (32%) accounting for the highest proportional share.
- 7% had downloaded or accessed audiobooks in the last week. Eight in 10 (81%) had used only legal sources, with **paying "...for a subscription to a service that allows you to listen to audiobooks online"** (36%) accounting for the highest proportional share.

Section 03

Category Breakdown

Content consumption

The percentage of the total sample who have either purchased physical copies of or downloaded streamed, or shared content in the below (in the past 3 months)



Base: Total sample (n=3,863)

Category 01

Music

KEY POINTS

- Nine in ten agreed that music helps in dealing with challenging life circumstances such as COVID-19.
- The median time spent listening to music each day was 3 hours.
- 23% had downloaded music in the last week, with two thirds of these legally downloading. Only 9% solely used illegal downloading and the remainder did a mix of both. The biggest source of downloading (57%) was "Saving offline via a paid for subscription service". The median number of downloads in the last week was 10.
- 43% had streamed music in the last week, with almost all of these (98%) legally streaming (only 2% illegal). The biggest source for streaming (49%) was "a paid for subscription service". The median number of hours spent streaming in the last week was 5 hours (or 43 minutes each day.)

Category 01:

Music

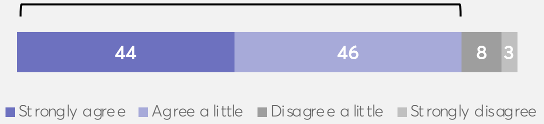
BROAD CONSUMPTION HABITS

Importance of music:

"Music helps me deal with challenging life circumstances (e.g. work or family stresses, concerns such as COVID-19)"

90%

agree



Time spent listening:

Median time spent listening to music each day

Week 1

3 hrs

Average monthly spend by service:

£10.02

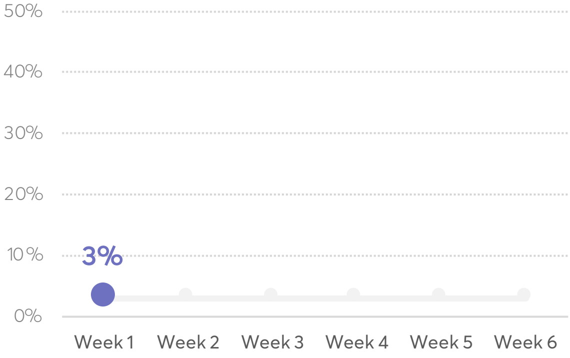
A paid for subscription service such as Spotify Premium, Amazon Prime Music, or Apple Music

£9.20

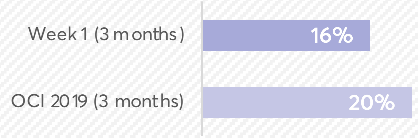
Paying a single fee to download individual songs or albums through services such as iTunes or Amazon

Physical purchasing:

Proportion who purchased physical products in past week



Baseline data (3 month)



Base: Music consumers (n=2,330)

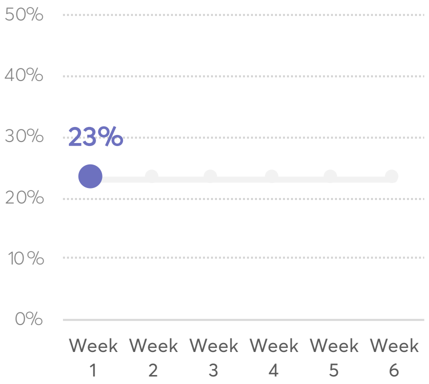
Base: Total sample (n=3,863), OCI 2019 (n=5,014)

Category 01:

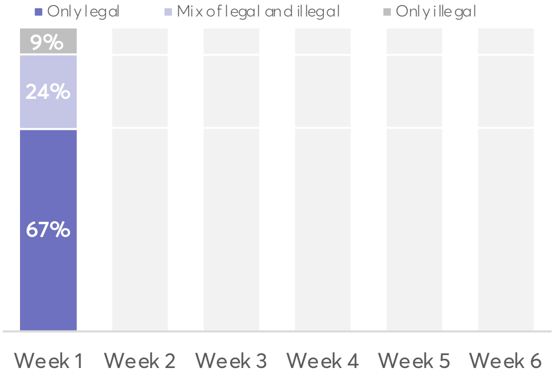
Music

DOWNLOADING

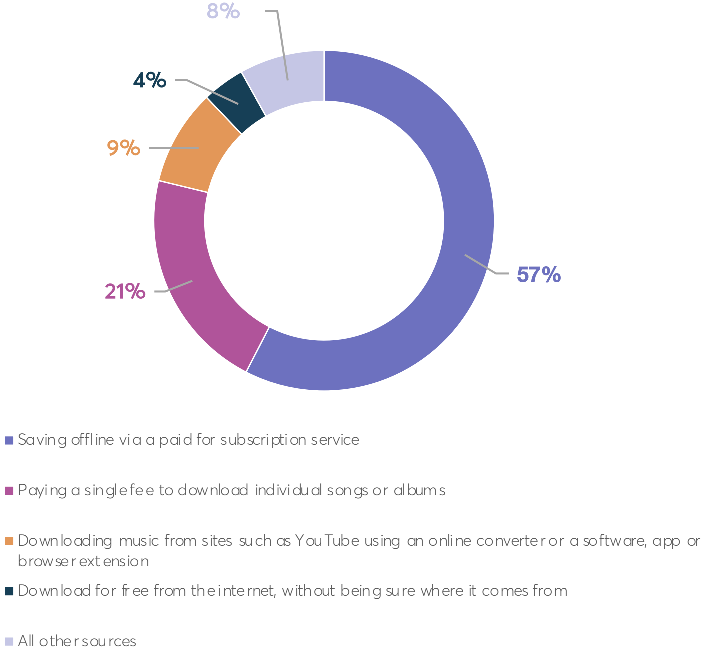
Downloading activity:



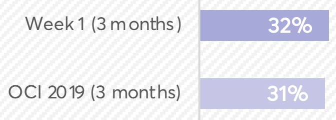
Downloading sources:



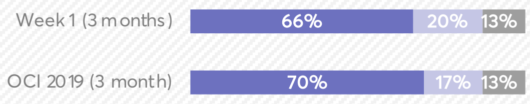
Share of downloading across sources | Week 1



Baseline data (3 month)



Baseline data (3 month)



Median number of downloads in past week: 10

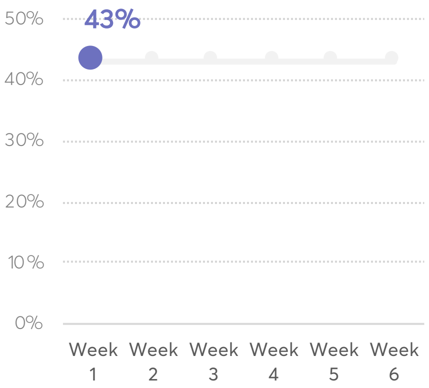
Base: Total sample (n=3,863), OCI 2019 (n=5,014), Base: Music downloaders: weekly (n=960), 3 months (n=1,302), and OCI 2019 (n=1,622)

Category 01:

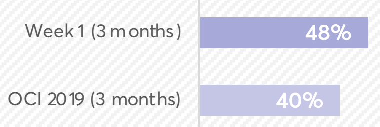
Music

STREAMING

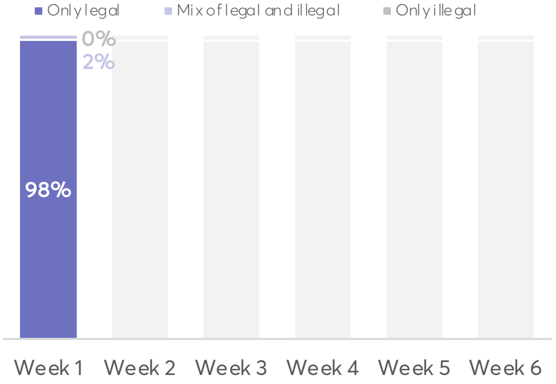
Streaming activity:



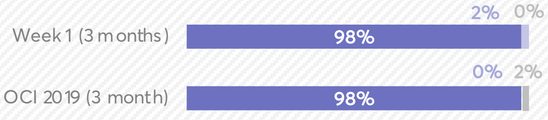
Baseline data (3 month)



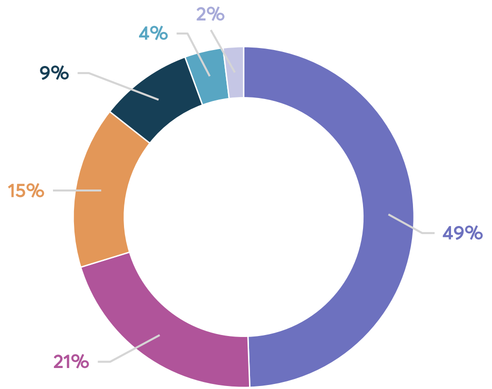
Streaming sources:



Baseline data (3 month)



Share of time spent across sources:



- A paid for subscription service
- A site such as YouTube or Dailymotion to watch/listen to music
- A free version/tier of a music streaming service
- Listening to the radio online (via websites or apps) either live or through catchup services
- Social media services such as Facebook, Twitter, Instagram, Snapchat or TikTok
- All other sources

Median hours spent streaming in past week: 5 hours per week or 43 minutes each day

Base: Total sample (n=3,863), OCI 2019 (n=5,014), Base: Music streamers: weekly (n=1,781), 3 months (n=1,950), and OCI 2019 (n=2,070)

Category 02

Film

KEY POINTS

- Eight in ten agreed that film helps in dealing with challenging life circumstances such as COVID-19.
- The median time spent watching films each day was 3 hours.
- 20% had downloaded films in the last week, with three quarters of these legally downloading. Only 7% solely used illegal downloading and the remainder did a mix of both. The biggest source of downloading (60%) was "Saving offline via a paid for subscription service such as Netflix, Amazon Prime Video, NowTV etc.". The average number of downloads in the last week was 3.
- 46% had streamed films in the last week, with the majority (86%) legally streaming. Just 2% had used only illegal sources, with 12% using a mix of legal and illegal. The biggest source for streaming (73%) was "A paid subscription to an online video streaming service (Netflix, Amazon Prime Video etc.)". The average number of hours spent streaming in the last week was 6 hours (or 61 minutes each day.)

Category 02:

Film

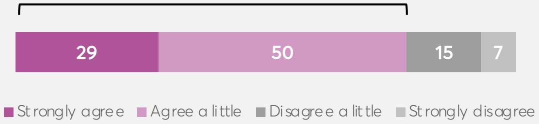
BROAD CONSUMPTION HABITS

Importance of film:

"Film helps me deal with challenging life circumstances (e.g. work or family stresses, concerns such as COVID-19)"

78%

agree



Time spent watching:

Median time spent watching films each day

Week 1

3 hrs

Average monthly spend by service:

£11.63

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

£11.52

Paying a single fee to download individual films/movies or movies through services such as iTunes

£10.30

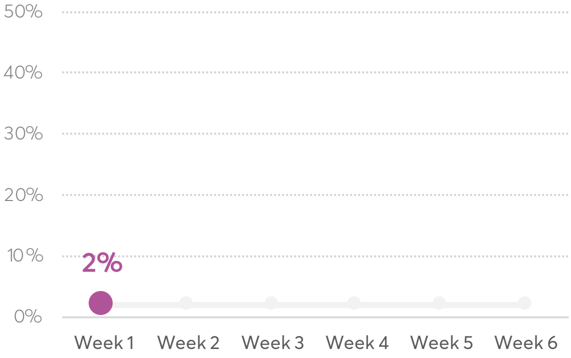
A paid subscription to an IPTV provider that gives you access to content from apps/services without you needing to sign-up

£10.92

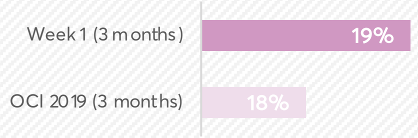
Renting individual films/movies through television services (Sky, Virgin Media etc.)

Physical purchasing:

Proportion who purchased physical products in past week



Baseline data (3 month)



Base: Film consumers (n=2,572)

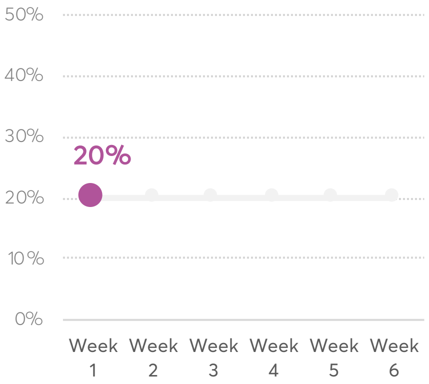
Base: Total sample (n=3,863), OCI 2019 (n=5,014)

Category 02:

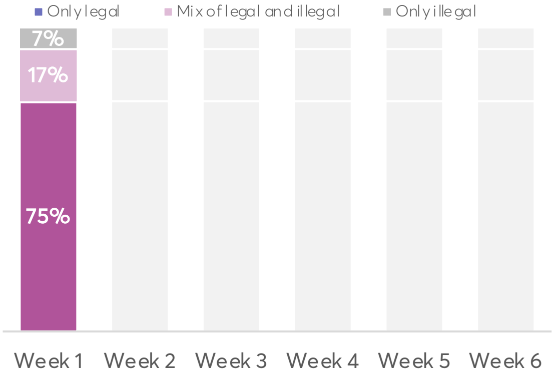
Film

DOWNLOADING

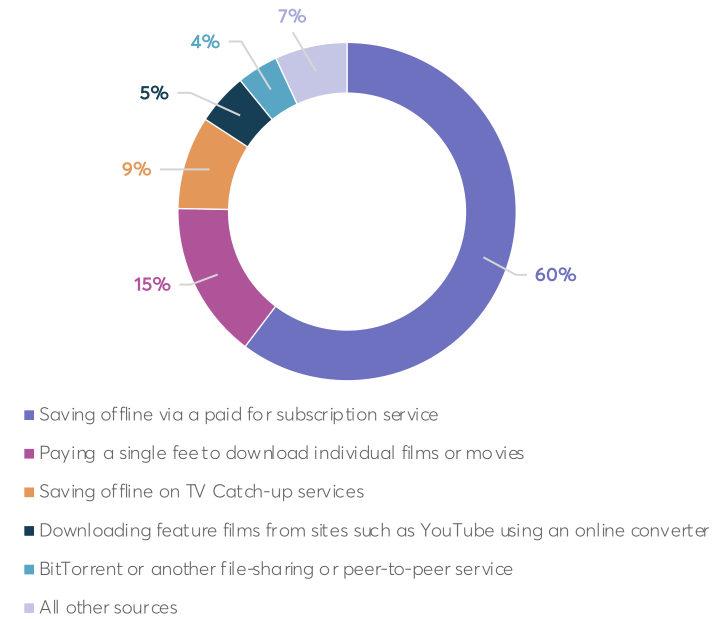
Downloading activity:



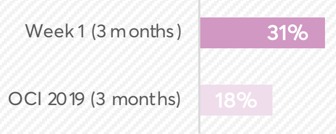
Downloading sources:



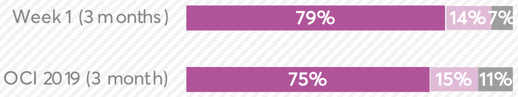
Share of downloading across sources | Week 1



Baseline data (3 month)



Baseline data (3 month)



Median number of downloads in past week: 3

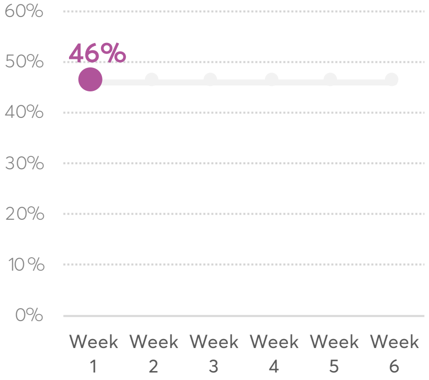
Base: Total sample (n=3,863), OCI 2019 (n=5,014), Base: Film downloaders: weekly (n=813), 3 months (n=1,259), and OCI 2019 (n=913)

Category 02:

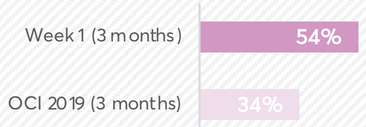
Film

STREAMING

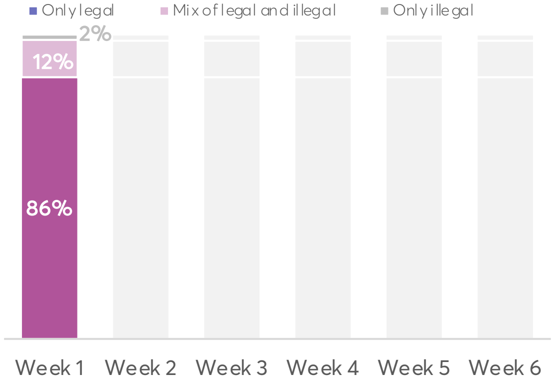
Streaming activity:



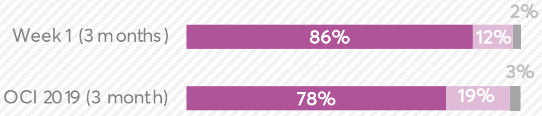
Baseline data (3 month)



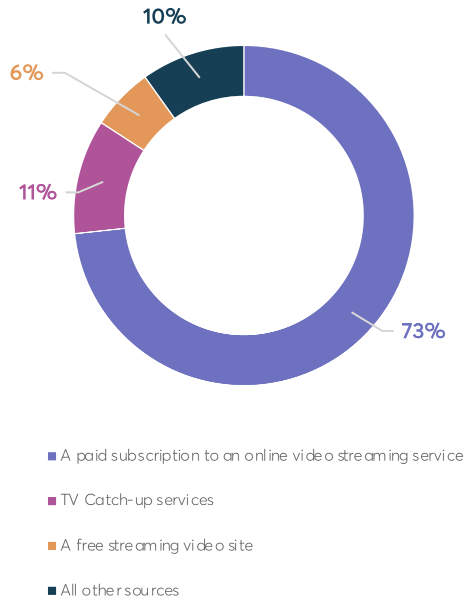
Streaming sources:



Baseline data (3 month)



Share of time spent across sources:



Median hours spent streaming in past week: 6 hours per week or 61 minutes each day

Base: Total sample (n=3,863), OCI 2019 (n=5,014), Base: Film streamers: weekly (n=1,897), 3 months (n=2,201), and OCI 2019 (n=1,744)

Category 03

TV

KEY POINTS

- Eight in ten agreed that TV helps in dealing with challenging life circumstances such as COVID-19.
- The median time spent watching TV each day was 4 hours.
- 15% had downloaded TV shows in the last week, with the majority (82%) legally downloading. Only 5% solely used illegal downloading and the remainder did a mix of both. The biggest source of downloading (55%) was "Saving offline via a paid for subscription service such as Netflix, Amazon Prime Video, NowTV etc.". The median number of downloads in the last week was 5.
- 42% had streamed TV in the last week, with the majority (89%) legally streaming. Just 2% had used only illegal sources, with 9% using a mix of legal and illegal. The biggest source for streaming (66%) was "A paid subscription to an online video streaming service (Netflix, Amazon Prime Video etc.)". The median number of hours spent streaming in the last week was 8 hours (or 69 minutes each day.)

Category 03:

TV

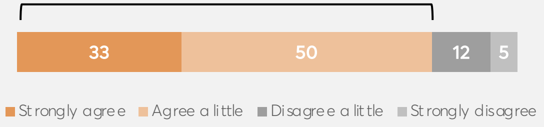
BROAD CONSUMPTION HABITS

Importance of TV:

"TV helps me deal with challenging life circumstances (e.g. work or family stresses, concerns such as COVID-19)"

83%

agree



Time spent watching:

Median time spent watching TV each day

Week 1

4 hrs

Average monthly spend by service:

£11.80

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

£13.10

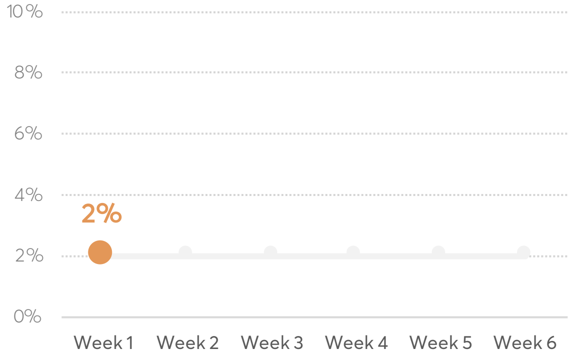
Paying a single fee to download or stream TV programmes/episodes through services such as iTunes, Amazon Prime Video or Sky

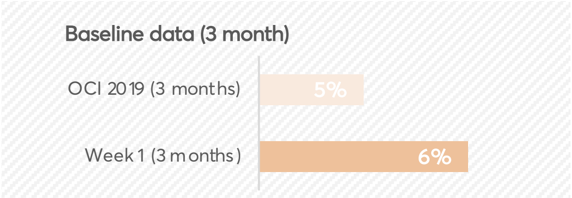
£13.80

A paid subscription to an IPTV provider (Insight IPTV, Gears TV etc.) that gives you access to content from apps/services (e.g. Netflix) without you needing to sign-up for a separate (paid) subscription

Physical purchasing:

Proportion who purchased physical products in past week





Base: TV consumers (n=2,414)

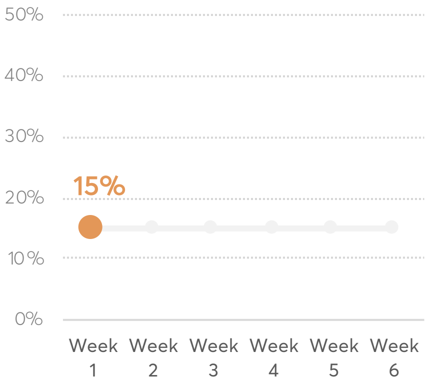
Base: Total sample (n=3,863), OCI 2019 (n=5,014)

Category 03:

TV

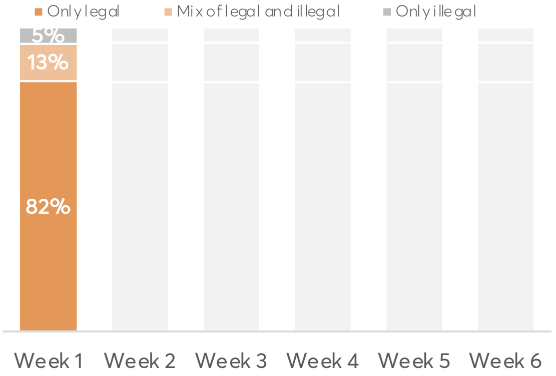
DOWNLOADING

Downloading activity:

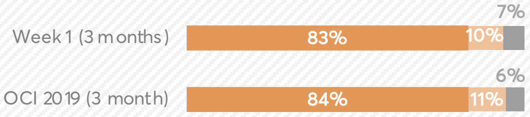


Baseline data (3 month)

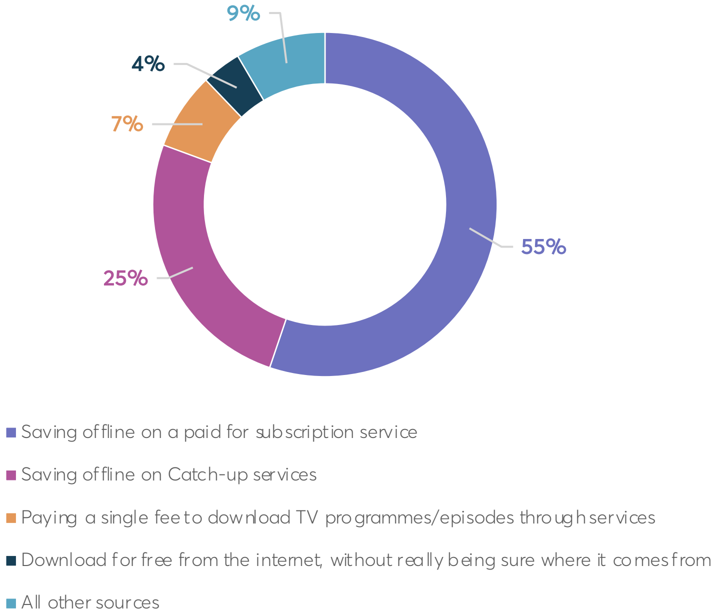
Downloading sources:



Baseline data (3 month)



Share of downloading across sources | Week 1



Median number of downloads in past week: 5

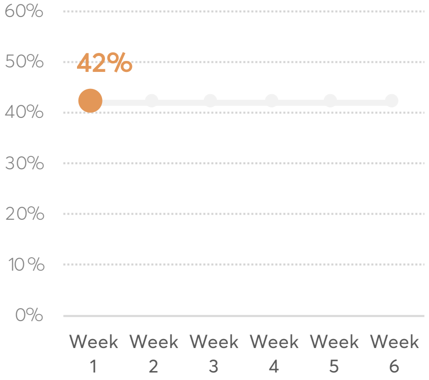
Base: Total sample (n=3,863), OCI 2019 (n=5,014), Base: TV downloaders: weekly (n=610), 3 months (n=1,041), and OCI 2019 (n=1,136)

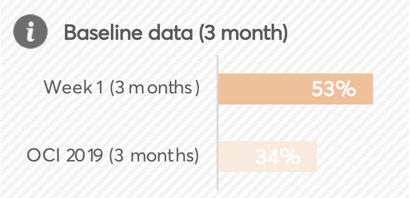
Category 03:

TV

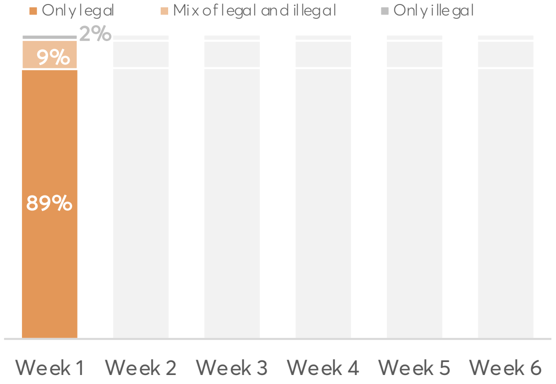
STREAMING

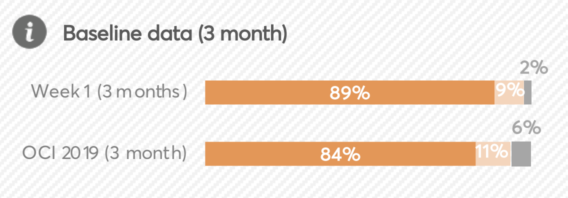
Streaming activity:



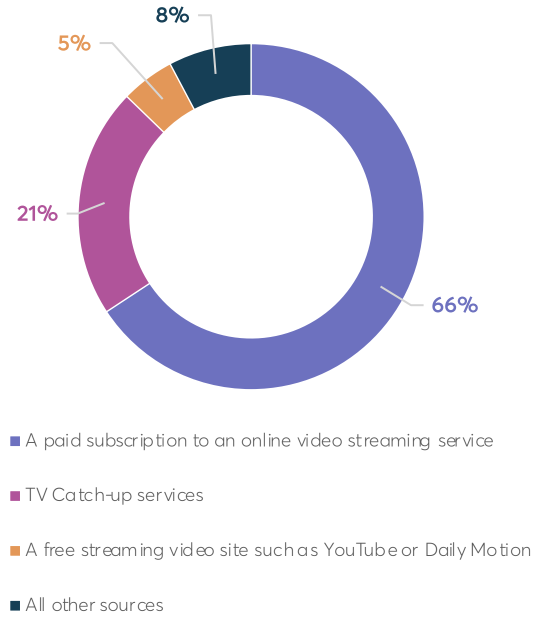


Streaming sources:





Share of time spent across sources:



Median hours spent streaming in past week: 8 hours per week or 69 minutes each day

Base: Total sample (n=3,863), OCI 2019 (n=5,014), Base: TV streamers: weekly (n=1,732), 3 months (n=2,155), and OCI 2019 (n=2,137)

Category 04

Video games

KEY POINTS

- Seven in ten agreed that video games helps in dealing with challenging life circumstances such as COVID-19.
- The median time spent playing video games each day was 3 hours.
- 17% had downloaded/accessed video games in the last week, with nine in ten (87%) of them legally downloading. Only 2% solely used illegal downloading and the remainder did a mix of both.
- The biggest sources of downloading (40%) were “paying a single fee to download individual video games” and “downloading video games for free through Apple App store, PlayStation etc.”
- The median number of downloads in the last week was 2.

Category 04:

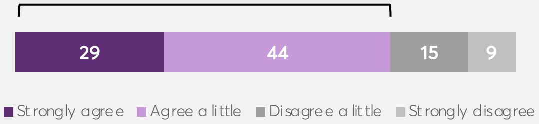
Video games

BROAD CONSUMPTION HABITS

Importance of video games:

"Video games help me deal with challenging life circumstances (e.g. work or family stresses, concerns such as COVID-19)"

73%
agree



Base: Video games consumers (n=1,359)

Time spent playing video games:

Median time spent playing video games each day

Week 1

3 hrs

Average monthly spend by service:

£22.02

Paying a small fee to access one or many games through a shared/unknown account (e.g. Usher shares login credentials)

£13.16

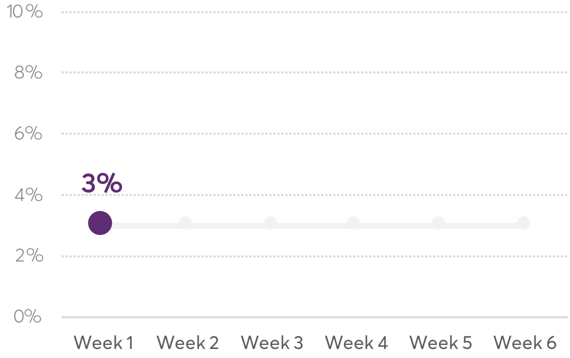
A video game streaming service such as PlayStation Now or Google Stadia

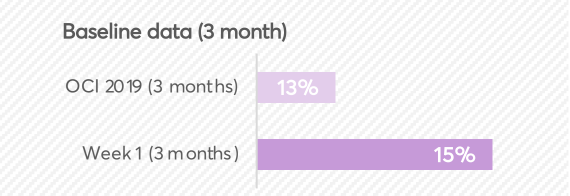
£22.69

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

Physical purchasing:

Proportion who purchased physical products in past week





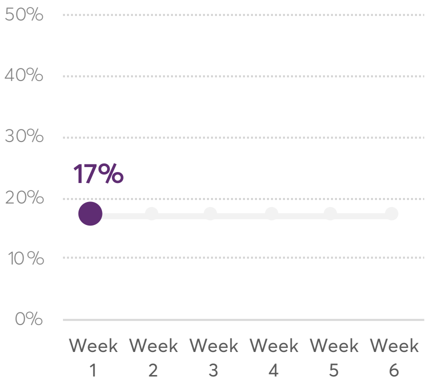
Base: Total sample (n=3,863), OCI 2019 (n=5,014)

Category 04:

Video games

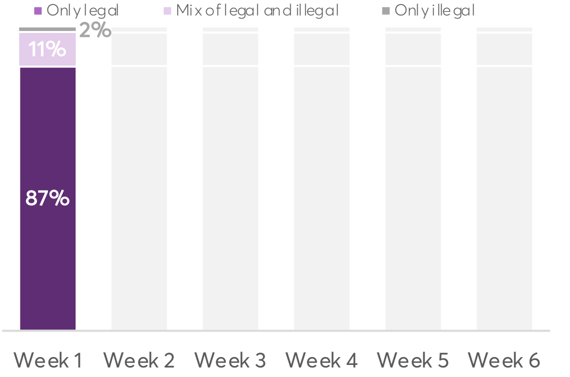
DOWNLOADING/ACCESSING

Downloading/accessing activity:

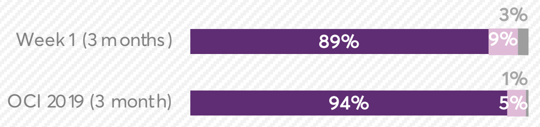


Baseline data (3 month)

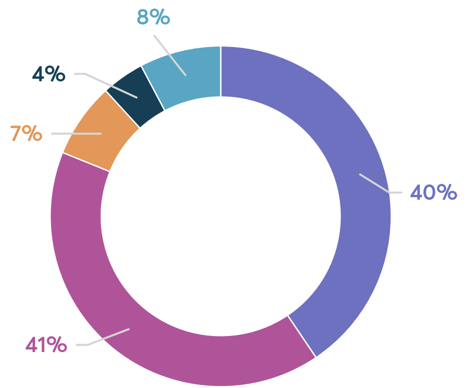
Downloading/accessing sources:



Baseline data (3 month)



Share of downloading/accessing across sources | Week 1



- Paying a single fee to download individual video games
- Downloading video games for free through Apple App Store, PlayStation etc.
- A video game streaming service such as PlayStation Now or Google Stadia
- Social media services such as Facebook, Twitter, Instagram or Snapchat
- All other sources

Median number downloaded/accessed in past week: 2

Base: Total sample (n=3,863), OCI 2019 (n=5,014), Base: Video game downloaders: weekly (n=716), 3 months (n=1,195), and OCI 2019 (n=1,121)

Category 05

E-publishing

KEY POINTS

- Seven in ten agreed that books, magazines and/or audiobooks help in dealing with challenging life circumstances such as COVID-19.
- The average time spent reading/listening each day was 2 hours for books; 1 hour for magazines and 1 hours for audiobooks.
- 18% had downloaded or accessed E-books in the last week, with the majority (85%) legally downloading/accessing. Only 6% solely used illegal downloading and the remainder did a mix of both. The biggest source of downloading/accessing E-books (52%) was "paying a single fee to download individual books". The median number of downloads in the last week was 2.
- 6% had downloaded or accessed digital magazines in the last week, with three quarters (74%) legally downloading/accessing. One in ten (15%) solely used illegal downloading and 11% did a mix of both. The biggest source of downloading/accessing digital publications (32%) was "pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online". The median number of downloads in the last week was 2.
- 7% had downloaded or accessed audiobooks in the last week, with the majority (81%) legally downloading/accessing. One in ten (9%) solely used illegal downloading and the remainder did a mix of both. The biggest source of downloading/accessing digital publications (36%) was "pay for a subscription to a service that allows you to listen to audiobooks online". The median number of downloads in the last week was 1.

Category 05:

E-publishing

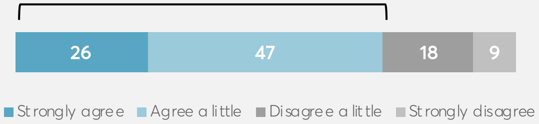
BROAD CONSUMPTION HABITS

Importance of publishing:

"Books, magazines and/or audiobooks help me deal with challenging life circumstances (e.g. work or family stresses, concerns such as COVID-19)"

73%

agree



Time spent reading/listening:

Median time spent reading publications (physical and digital) each day

Week 1

Books: 2 hrs

Magazines: 1 hr

Audiobooks: 1 hrs

Average monthly spend by service:

Paying a single fee:

£8.30	£8.90	£8.00
to download individual e-books	to download or read individual issues of digital magazines	to download individual audiobooks

Paying for a subscription to a service:

£8.50	£8.70	£8.50
that allows you download or read e-books online	or publisher that allows you to download or access multiple issues of digital magazines online	that allows you listen to audiobooks online

Base: E-publishing consumers (n=1,468)

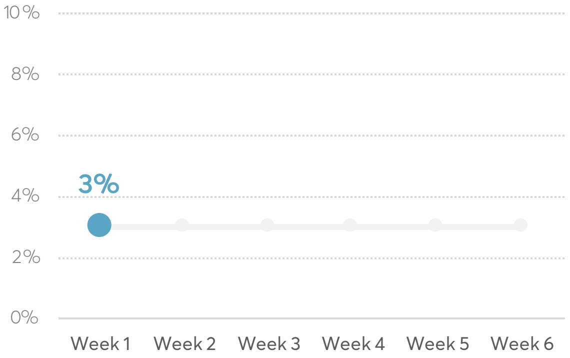
Category 05:

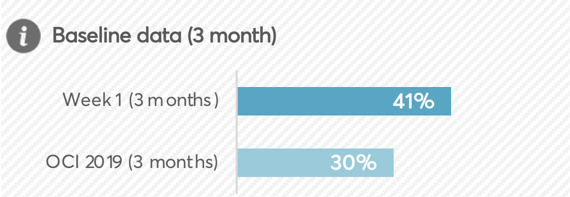
E-publishing

PHYSICAL PURCHASING

Physical purchasing (COMBINED):

Proportion who purchased physical products in past week





Number of physical purchases:

Average number of physical purchases in past week

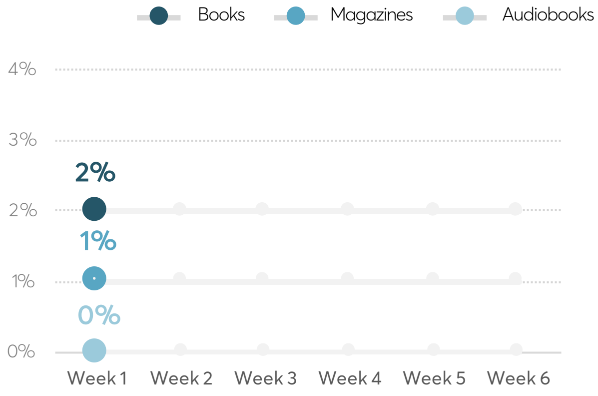
Books: 4

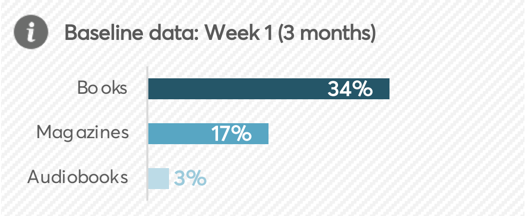
Digital magazines: 4

Audiobooks: 3

Physical purchasing:

Proportion who purchased physical products in past week





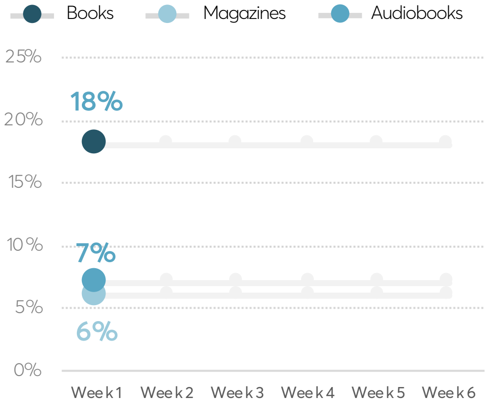
Base: Total sample (n=3,863), OCI 2019 (n=5,014)

Category 05:

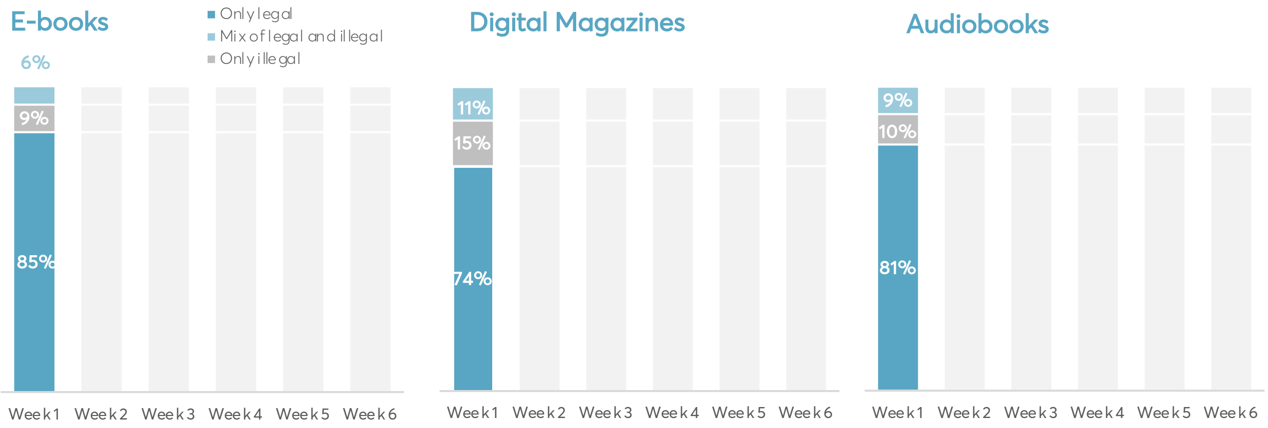
E-publishing

DOWNLOADING/ACCESSING

Downloading/accessing activity:



Downloading/accessing sources:



Baseline data (3 month)

Baseline data (3 month)

Base: Total sample (n=3,863), OCI 2019 (n=5,014) | Base: e-books (n=652), digital magazines (n=223) and audiobooks (n=246)

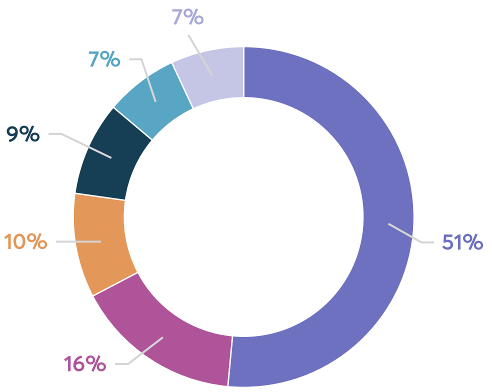
Category 05:

E-publishing

DOWNLOADING/ACCESSING

Median number of downloads past week: 2

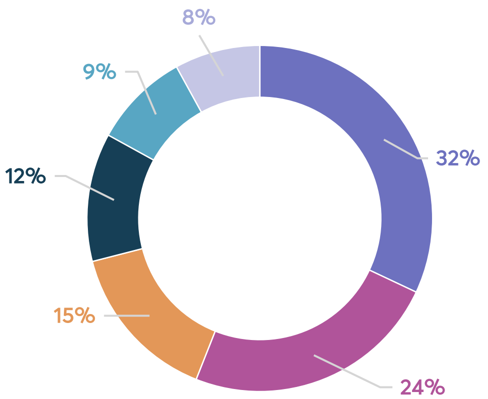
Share across sources | Week 1 (E-books)



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

Median number of downloads past week: 2

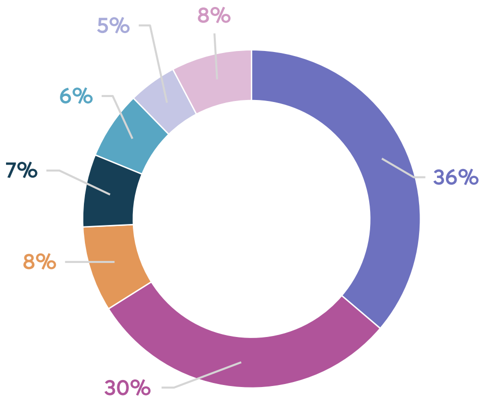
Share across sources | Week 1 (Digital Magazines)



- Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online
- Accessing content made available for free by publishers on their own social media or website
- Paying a single fee to download or read individual issues of digital magazines
- A free website which hosts or links to digital magazines I would otherwise expect to pay for
- Other
- All other sources

Median number of downloads past week: 1

Share across sources | Week 1 (Audiobooks)



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

Base: e-books (n=652), digital magazines (n=223) and audiobooks (n=246)

Section 04

Other content consumption

Other content consumption – key points

This study looks in detail at 17 additional types of content. Each has been categorised within one of the following four groups:

01
Content that people **read or watch**

02
Social and work related interactions

03
Active participation in **fitness and/or learning** activities

04
Creating and sharing content (your own or that of others)

In Wave 1, in order to investigate the impact of COVID-19 on consumption levels, those who had ever engaged with a content category were asked to compare their consumption now to pre the pandemic.

Other content consumption – key points

01. CONTENT THAT PEOPLE READ OR WATCH:

- For the content categories within this group, (approximately) between 4 and 10 and **half reported no change** (i.e. they consumed the same amount pre COVID-19).
- For each, around 4 in 10 or more reported an increase in their consumption, either engaging with something more frequently or for the first time.
- For most categories, this increase was in doing something more often.
- However, for "filmed performances of **theatre, concerts and/or dance shows online** (e.g. from the National Theatre)" and looking at "art, paintings and photographs online (e.g. from a virtual collection or museum)" a relatively even proportion reported doing them more often as did for the first time. More specifically, a quarter reported taking up these activities for the first time, prompted by the COVID-19 pandemic.

02. SOCIAL AND WORK-RELATED INTERACTIONS:

- Engagement with the **social media** options had the highest proportions reporting no change (over half), however around a quarter did report an increase.
- The most notable increases were for the use of **video software**, for work meetings and/or social activities. Interestingly, trends were somewhat similar, with over half reporting some level of increase, and 2 in 10 starting to use these for the first time.

Other content consumption – key points

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

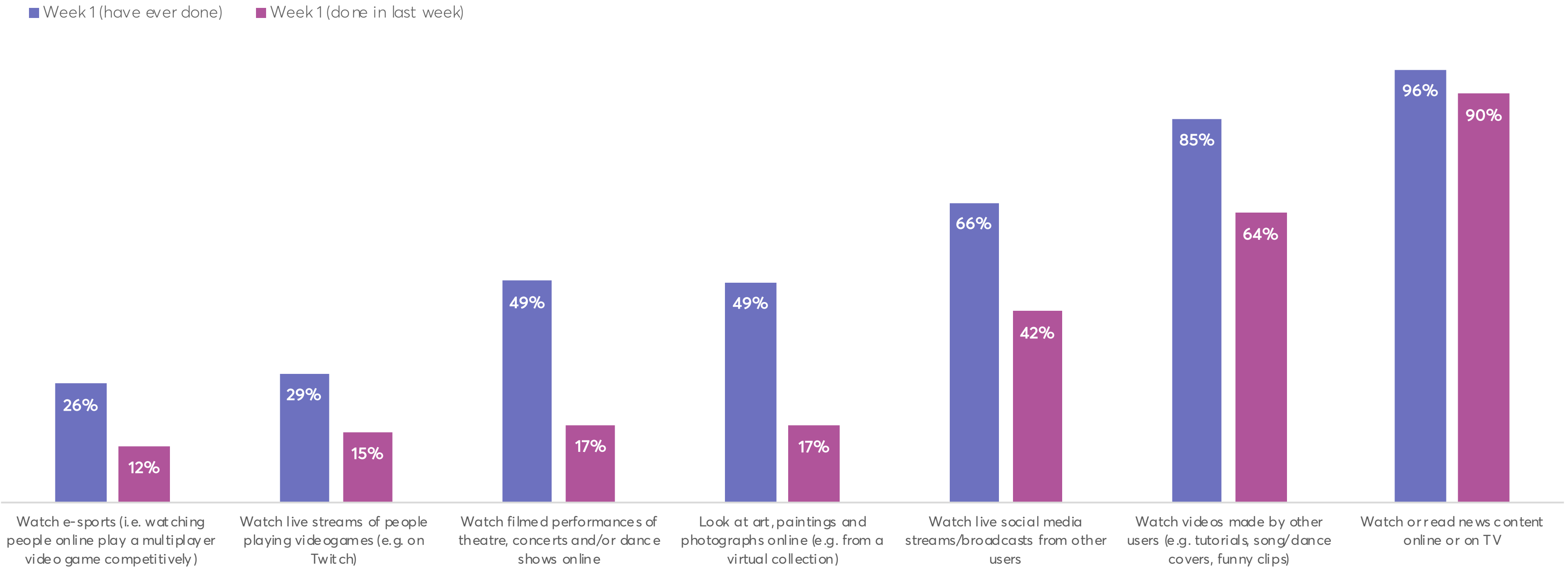
- **Online fitness** classes saw the highest overall increase in engagement compared to pre COVID-19 behaviours. Over half (56%) reported an increase in engagement, with 30% taking these up for the first time.
- Just under half (46%) reported an increase in **online learning**, via free classes or enrolling onto paid courses, with 20% taking these up for the first time.
- Increases in playing **multiplayer online video games** were slightly lower, though still notable. Overall, 40% reported an increase, with 13% doing so for the first time.

04. CREATING AND SHARING CONTENT (YOUR OWN OR THAT OF OTHERS):

- For all options in this category, while the highest proportions **reported no change** (around half), there were some noteworthy increases.
- 4 in 10 (43%) reported an increase in "Making content they own (e.g. music, films/shows, books) **publicly available** by uploading files or links online so others can download or stream/access". Furthermore, 20% had taken this up for the first time.
- A quarter (26%) reported **sharing images** that are not their own more often, with 12% taking this up since COVID-19.
- In terms of creating and sharing **sharing original content** (e.g. videos/written/audio content online) of their own, almost 4 in 10 (38%) reported an increase, with 17% doing this for the first time.

Other content consumption

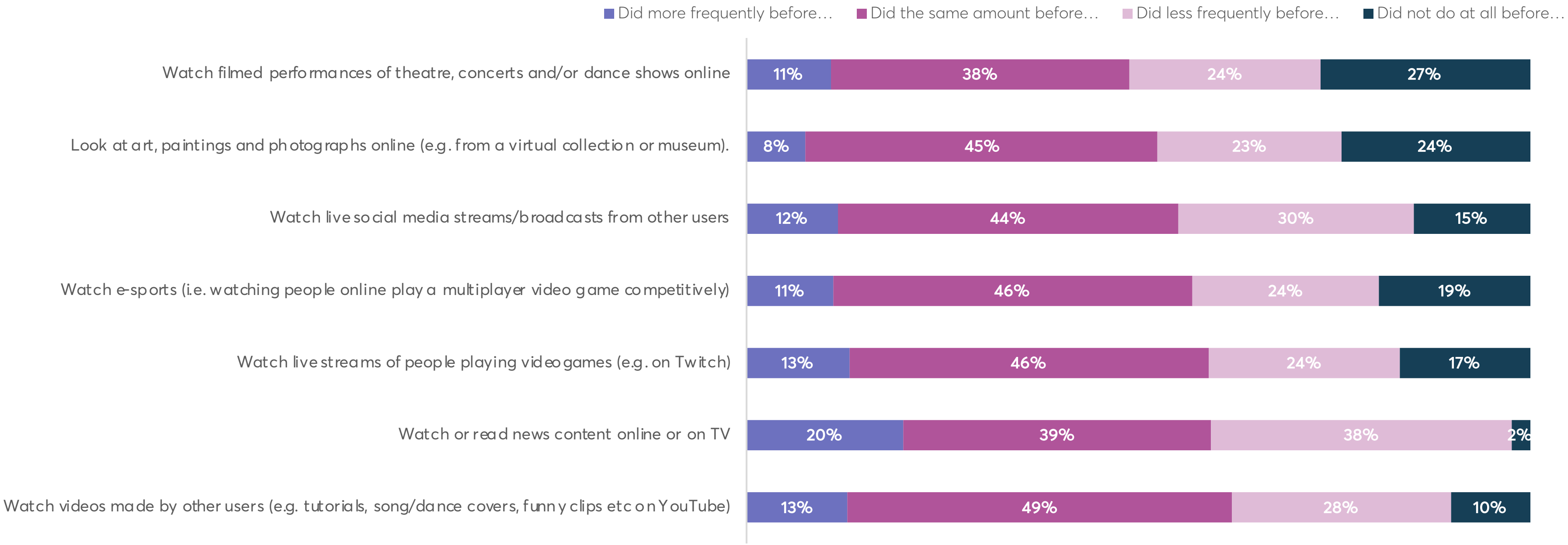
READ/WATCH



Base: Total sample (n=3,863)

Other content consumption

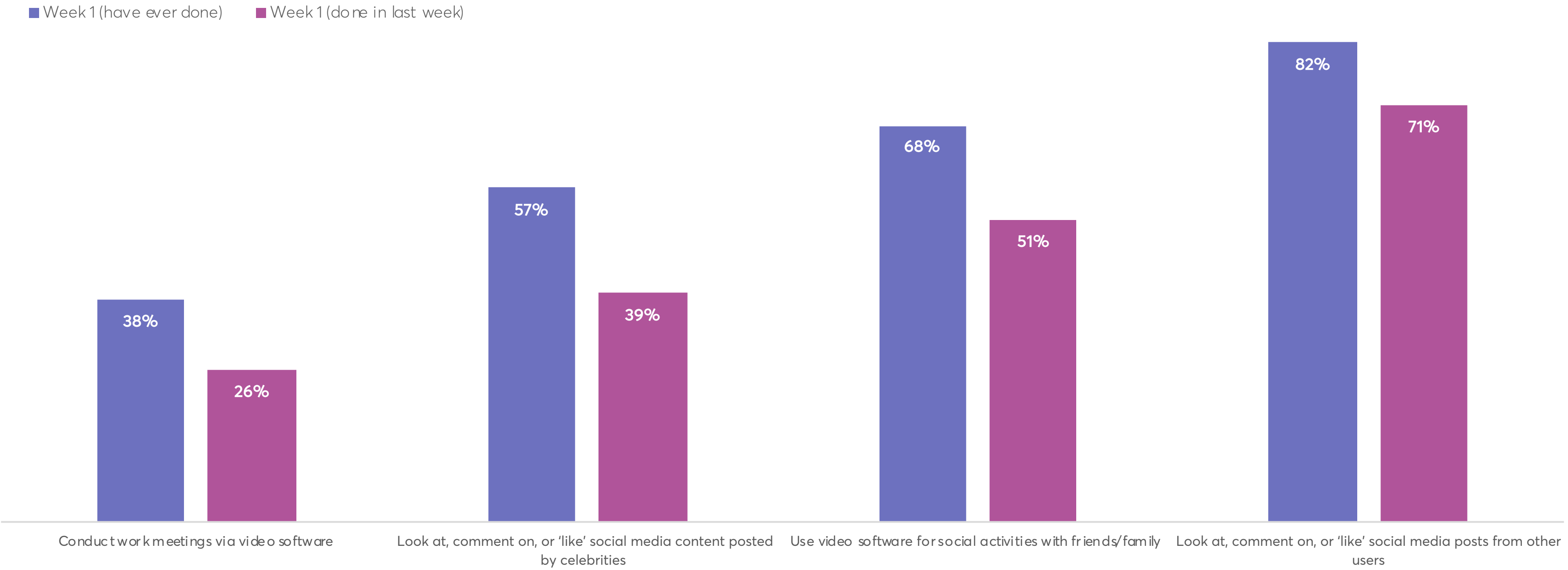
READ/WATCH



Base: n= from 1,111 to 3,693

Other content consumption

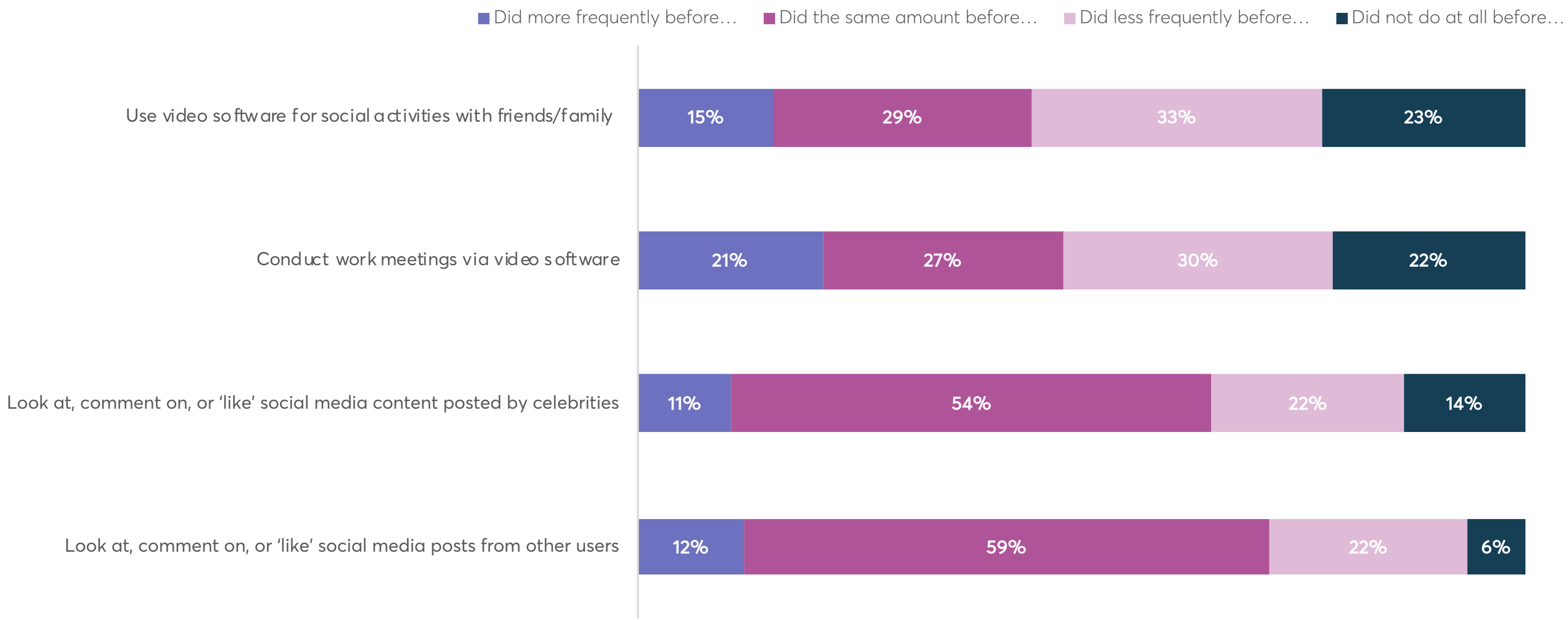
INTERACT WORK/SOCIAL



Base: Total sample (n=3,863)

Other content consumption

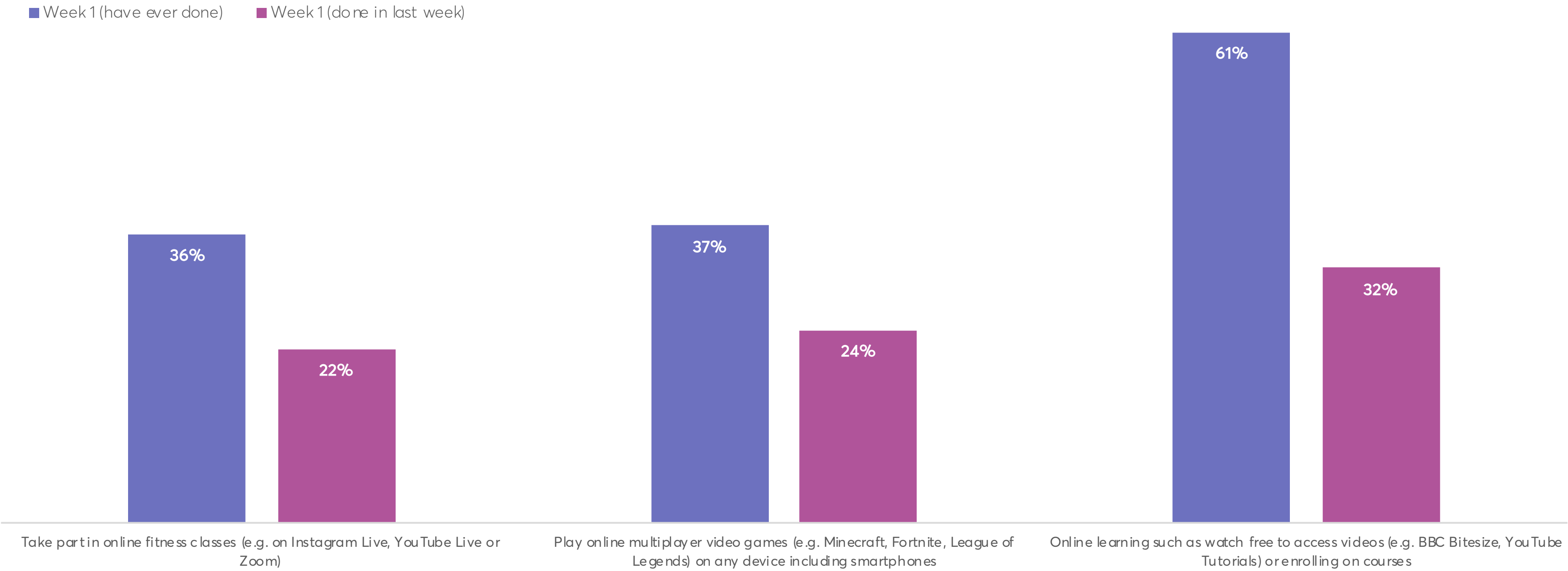
INTERACT WORK/SOCIAL



Base: n= from 1,598 to 3,232

Other content consumption

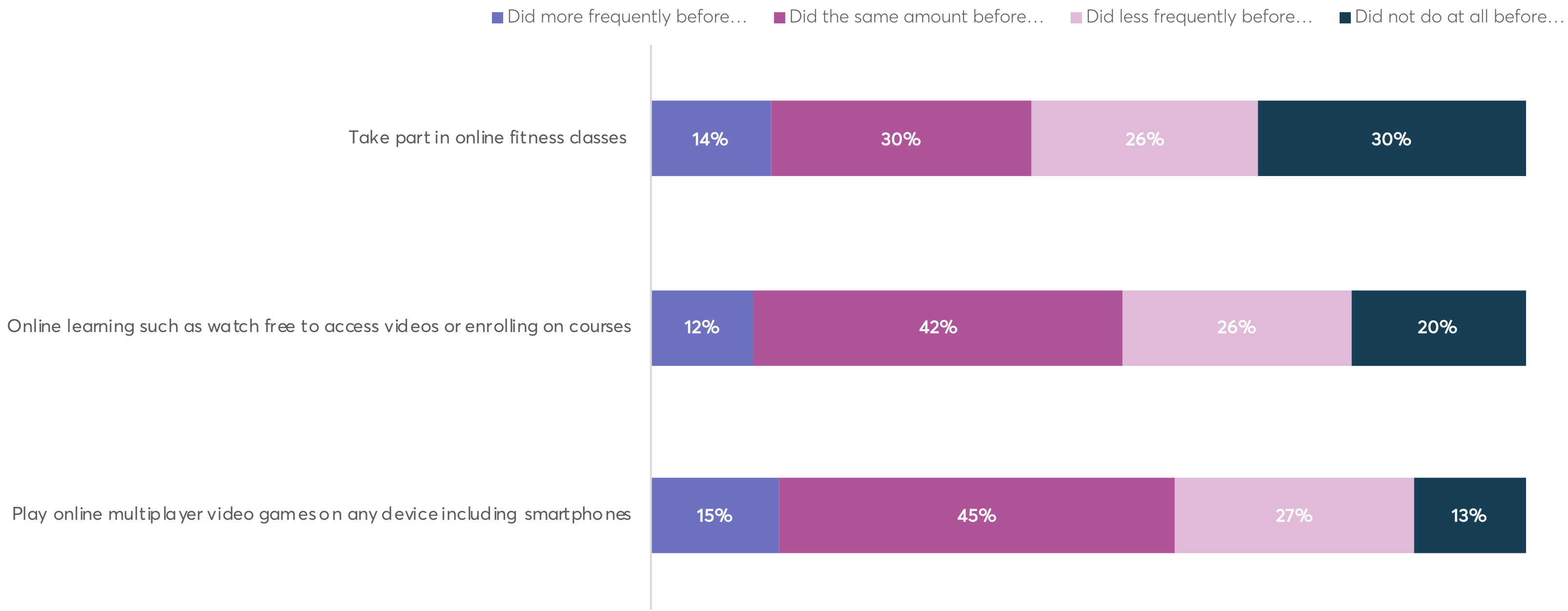
ACTIVELY PARTICIPATE



Base: Total sample (n=3,863)

Other content consumption

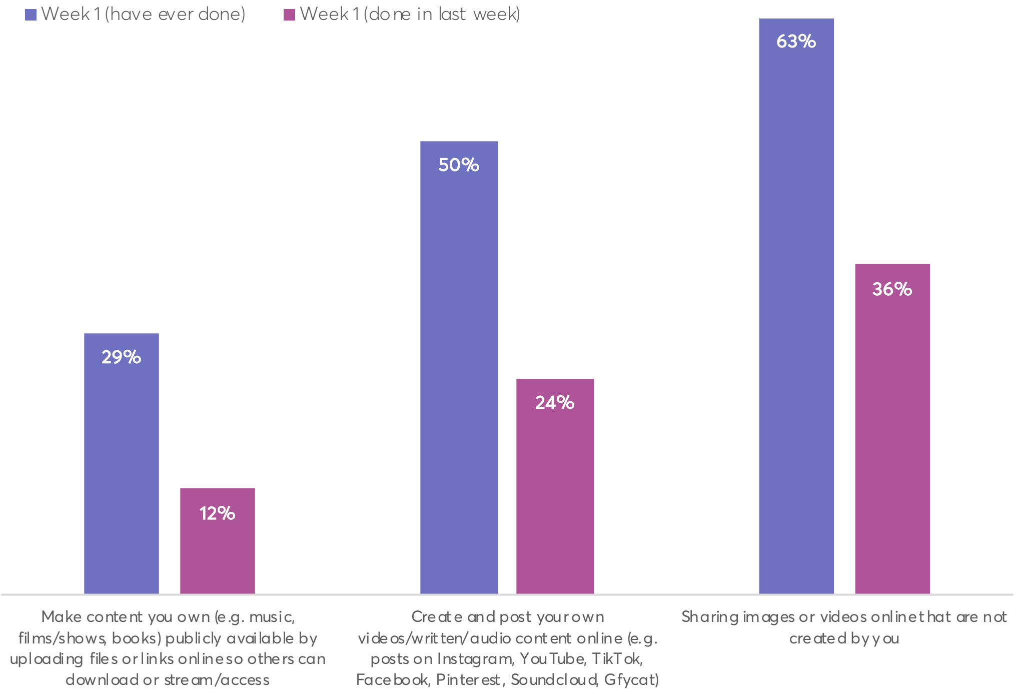
ACTIVELY PARTICIPATE



Base: n= from 1,478 to 2,466

Other content consumption

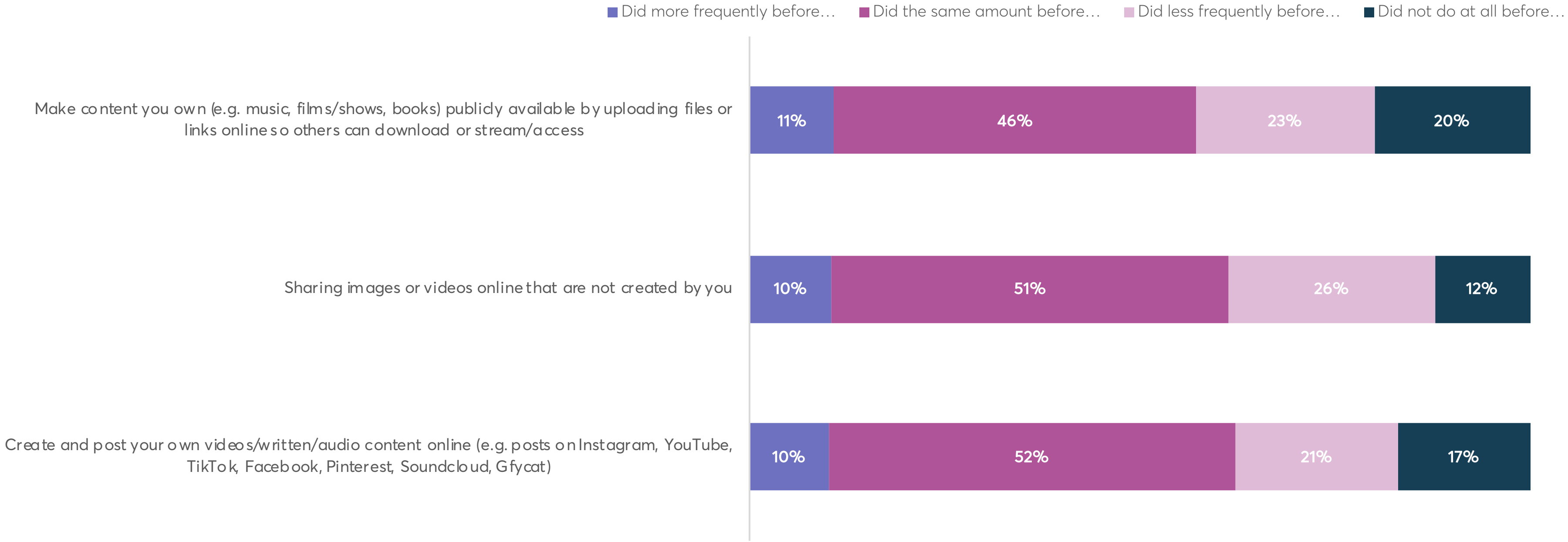
CREATE AND SHARE



Base: Total sample (n=3,863)

Other content consumption

CREATE AND SHARE



Base: n= from 1,194 to 2,537

Digital Culture - Consumer Tracking Study

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

Hasan Bakhshi | hasan.bakhshi@nesta.org.uk

pec.ac.uk | @CreativePEC

Intellectual Property Office

David Humphries | David.Humphries@ipo.gov.uk

gov.uk/government/organisations/intellectual-property-office | @The_IPO

AUDIENCE NET

Sania Haq | sania@audiencenet.co.uk

audiencenet.co.uk | @AudienceNet