Creative Industries
Policy & Evidence Centre
Led by nesta

# Digital Culture -
## Consumer Tracking Study

WAVE 2 OF 6 | MAY 2020

Intellectual Property Office

AUDIENCE NET

# Methodology and Sample

See Wave 1 report for the detailed overall methodology (link here), and base sizes for Wave 1.

Wave 2 fieldwork dates: 20th – 26th April.

Survey length: 5-7 minutes. N= 2,792

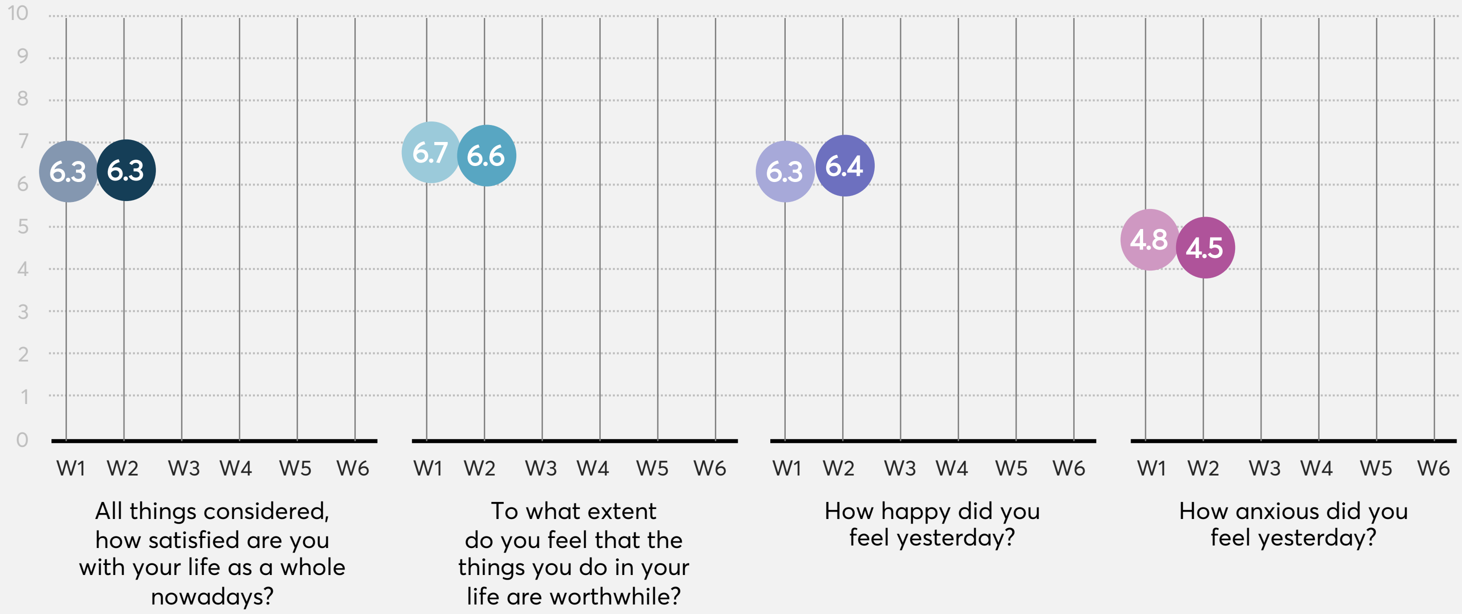
Respondents were asked to comment on the 7-day period prior (i.e. Monday 13th – Sunday 19th April 2020). While we have their historic behaviours tracked, each week respondents are asked afresh whether they have done any of the key actions/activities. This enables us to capture new consumers (e.g. those who did not stream music in Wave 1 but took it up in Wave 2).

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

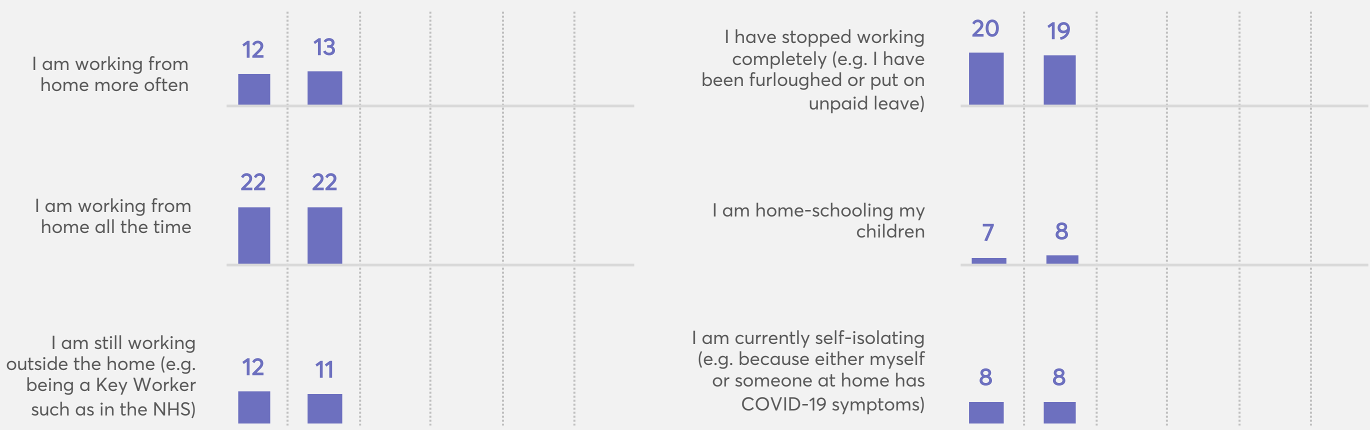
**Wave-on-wave differences** that are significant at a 95% confidence interval are highlighted in the charts (with arrows). Sizeable differences that are not significant are also highlighted in the analysis as these often provide early indications of shifts.

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

**Wellbeing** | Average (0 - 10)




**Changes in work/lifestyle due to COVID-19**



# Overview

The median amount of **time spent per day accessing** music, film and video games was unchanged (at 3 hours). While TV saw a slight decline in time (by 30 minutes), it continued to have the highest median time across consumer groups (3.5 hours). Audiobooks saw an increase from 1 hour to 2, while books and magazines remained static at 2 hours and 1 hour respectively.

Most categories saw a slight increase (up to 6%) in the proportions who had **downloaded** content in the last week, while **streaming saw a more notable increase**. This was particularly the case for music, which we might speculate could in part be explained by the live stream of the Global Citizen “One World: Together at Home” concert on Saturday 18th April. Wave 3 results will provide more insight into whether this was a temporary increase or if we are seeing a more sustained increase in music streaming.

Music, film and TV saw **a decline in the median number of hours spent streaming per week**. Given that, for each of these content categories the median number of **total hours spent per day was unchanged**, this could suggest that people accessed more content through means other than streaming this week (e.g. downloaded content, offline formats).

All categories saw a **decrease in the combined total proportion** using illegal methods (i.e. solely using illegal sources or a mix of legal and illegal). This ranged from a 1 to 8 percentage point drop.

Most categories saw an increase in the proportion who had bought **physical products**.

Looking at the **other/non-traditional content categories** covered such as online theatre, art and fitness, there were marginal changes from week 1.

**Wellbeing levels remained similar to week 1.** Likewise changes to work/lifestyle due to COVID-19 were similar to levels reported in week 1.

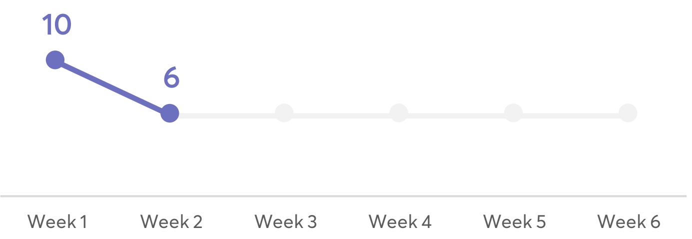
CATEGORY 01

# Music

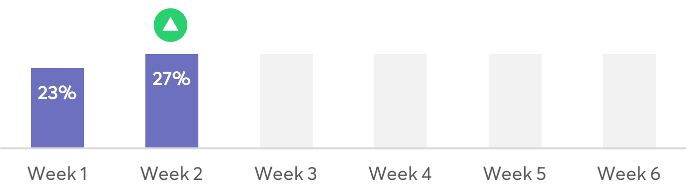
- Median hours spent listening to music remained unchanged at 3 hours per day.
- The number of respondents downloading music increased by 4 percentage points to 27%. However the median number of downloads dropped from 10 to 6.
- The proportion using partly or wholly illegal downloading sources decreased from 33% to 18%. However, the number using solely illegal downloading sources increased by 6 percentage points to 15%.
- There were no noteworthy changes in the share of downloading across sources.
- The number of respondents streaming music increased substantially by 17 points to 60%. By way of context, the Global Citizen "One World: Together at Home" live streamed concert took place this week and was available to watch live on most major platforms, including Facebook, Twitter, Instagram, YouTube, Twitch, Amazon Prime Video, Apple TV and Apple Music, which could have been partly responsible for the notable increase. The median number of hours spent streaming per week decreased, however, from 5 to 3.
- The overwhelming proportion using only legal streaming sources remained virtually the same (99%). Looking at share of streaming across sources, whilst a "paid for subscription service" was still dominant, it saw a slight decline (of 5 percentage points to 44%). Another notable shift was for the use of free sites such as "YouTube or Dailymotion" which saw a 4 percentage point increase (to 25%).
- There was a 5 percentage point increase in the proportion who had made a physical purchase (8%).

## DOWNLOADING

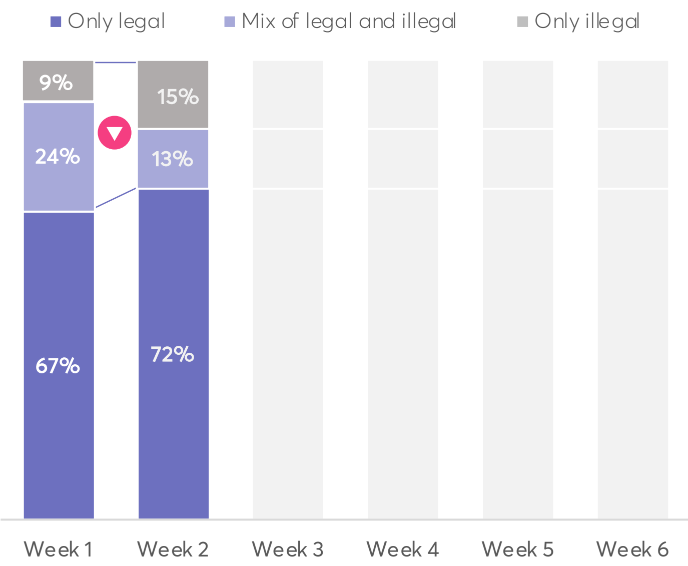
### Median number of downloads in past week:



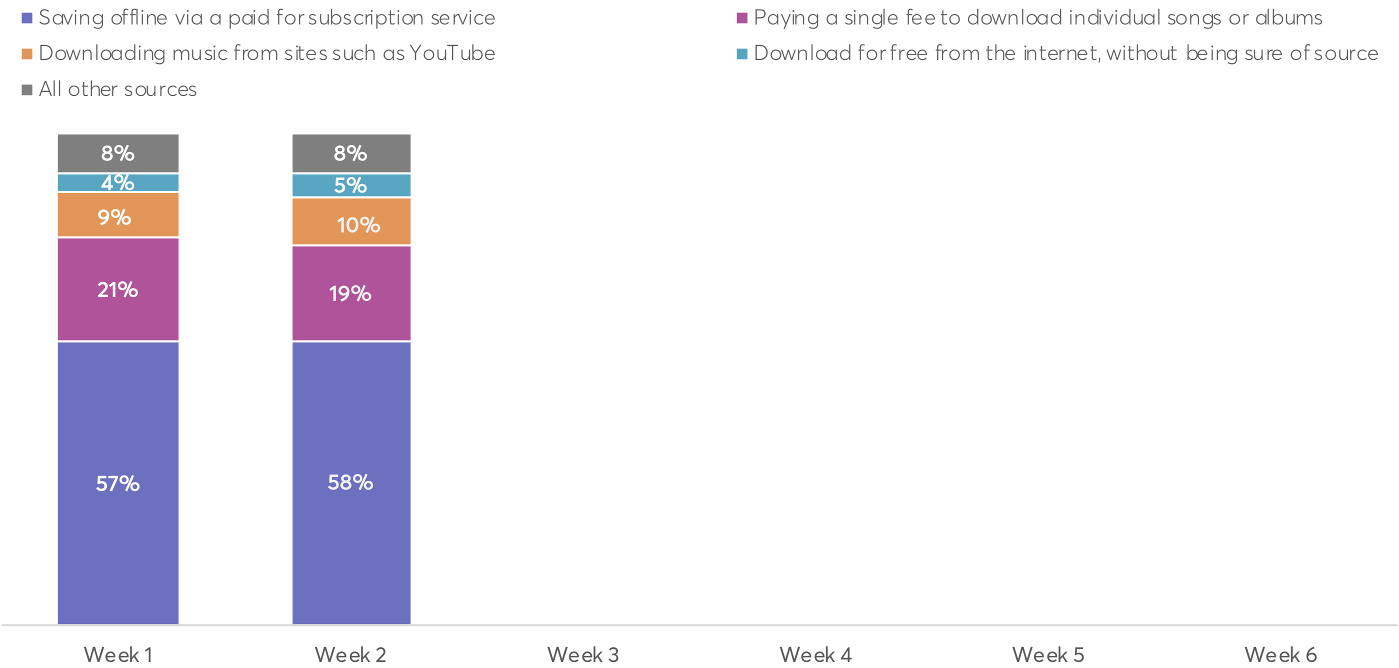

### Downloading activity:




### Downloading sources:




### Share of downloading across sources:

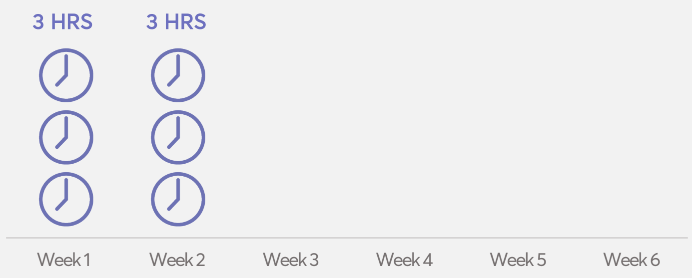



Base: Wave 2 – 'Downloading activity' (Total sample, n=2,792), 'Median number of downloads in past week', 'Downloading sources' and 'Share of downloading across sources' (Weekly music downloaders, n=735-757)

CATEGORY 01

# Music

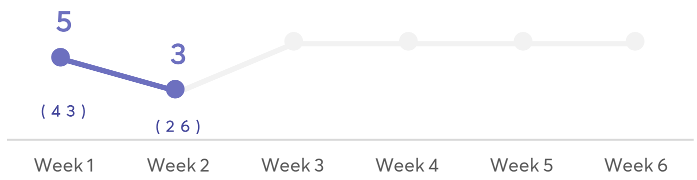
## Median time spent listening to music each day:



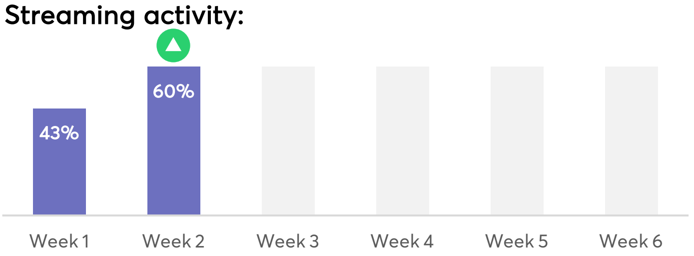

## Physical purchasing:


## STREAMING

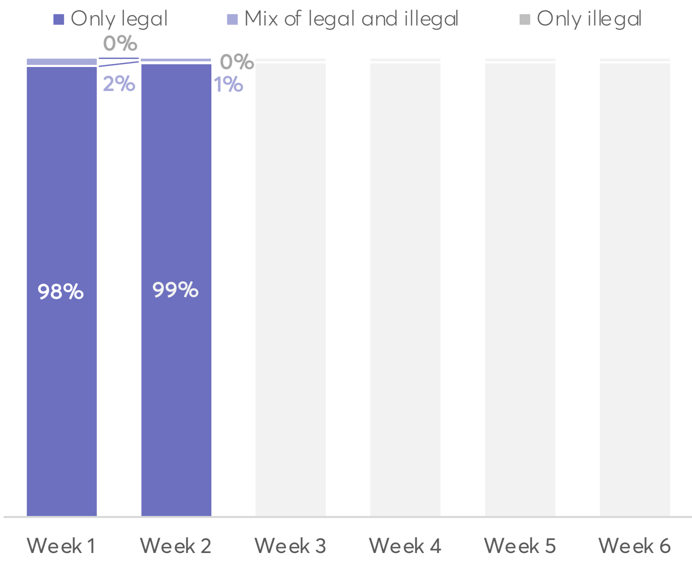
### Median hours spent streaming in past week
(or minutes per day):



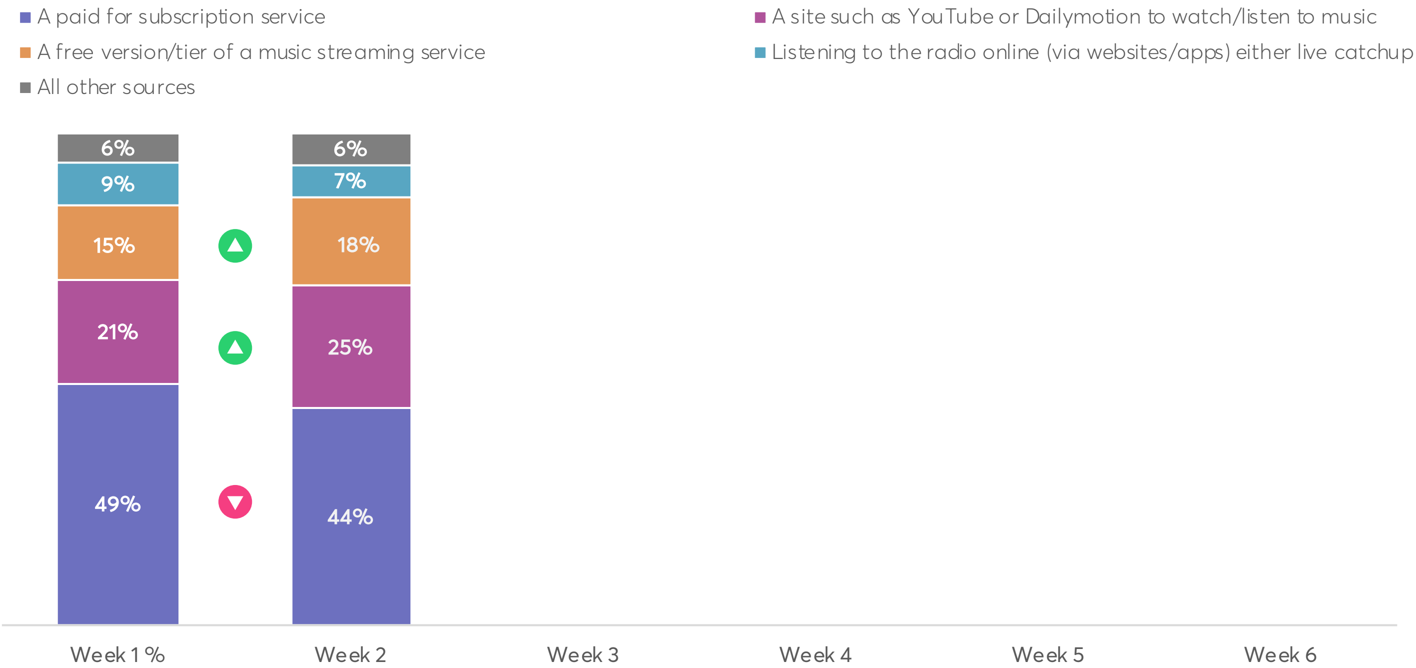

### Streaming activity:




### Streaming sources:




### Share of streaming across sources:




Base: Wave 2 – 'Streaming activity', 'Physical purchasing' (Total sample, n=2,792), 'Median time spent listening to music each day' (Downloaded, streamed, or purchased music in past week, n=1,686), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly music streamers, n=1,397-1,727)

CATEGORY 02

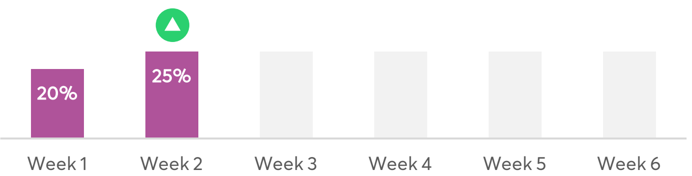
# Film

- Median hours spent watching films remained unchanged at 3 hours per day.
- The number of respondents downloading films increased by 4 percentage points to 25%, however the median number of downloads dropped by 1 (from 3 to 2).
- The proportion using partly or wholly illegal downloading sources decreased from 24% to 16%. While the proportion using only illegal sources remained static at 7%, the number using a mix of legal and illegal downloading sources decreased, by 8 percentage points to 9%. There were no noteworthy changes in the share of downloading across sources.
- The number of respondents streaming films increased by 10 points to 56%. The median number of hours spent streaming per week decreased from 6 to 4.
- The proportion using partly or wholly illegal streaming sources decreased from 14% to 10%. The proportion using only illegal sources remained similar, while those using a mix of legal and illegal streaming sources decreased, by 5 percentage points to 7%.
- Looking at share of streaming across sources, a "paid subscription service to an online video streaming service" remained the dominant method and increased its share by 4 percentage points to 78%. TV catch-up services saw a 2 percentage point decline in share (to 9%).
- There was a 10 percentage point increase in the proportion of those who made a physical purchased (to 13%).

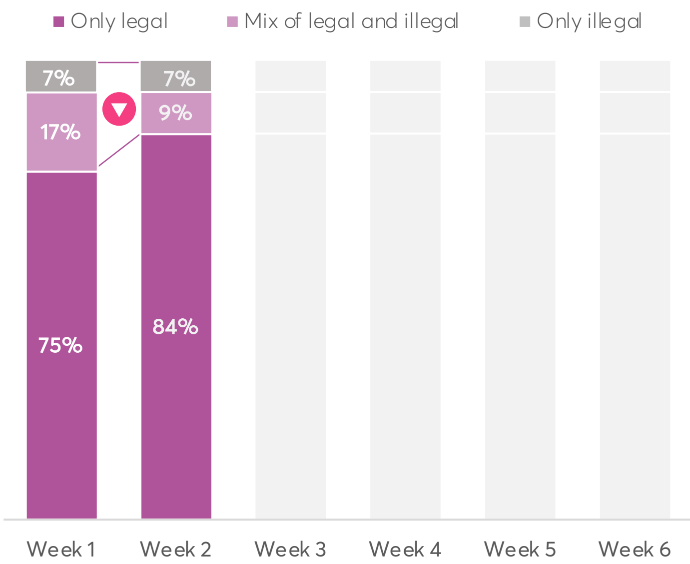
## DOWNLOADING

### Median number of downloads in past week:

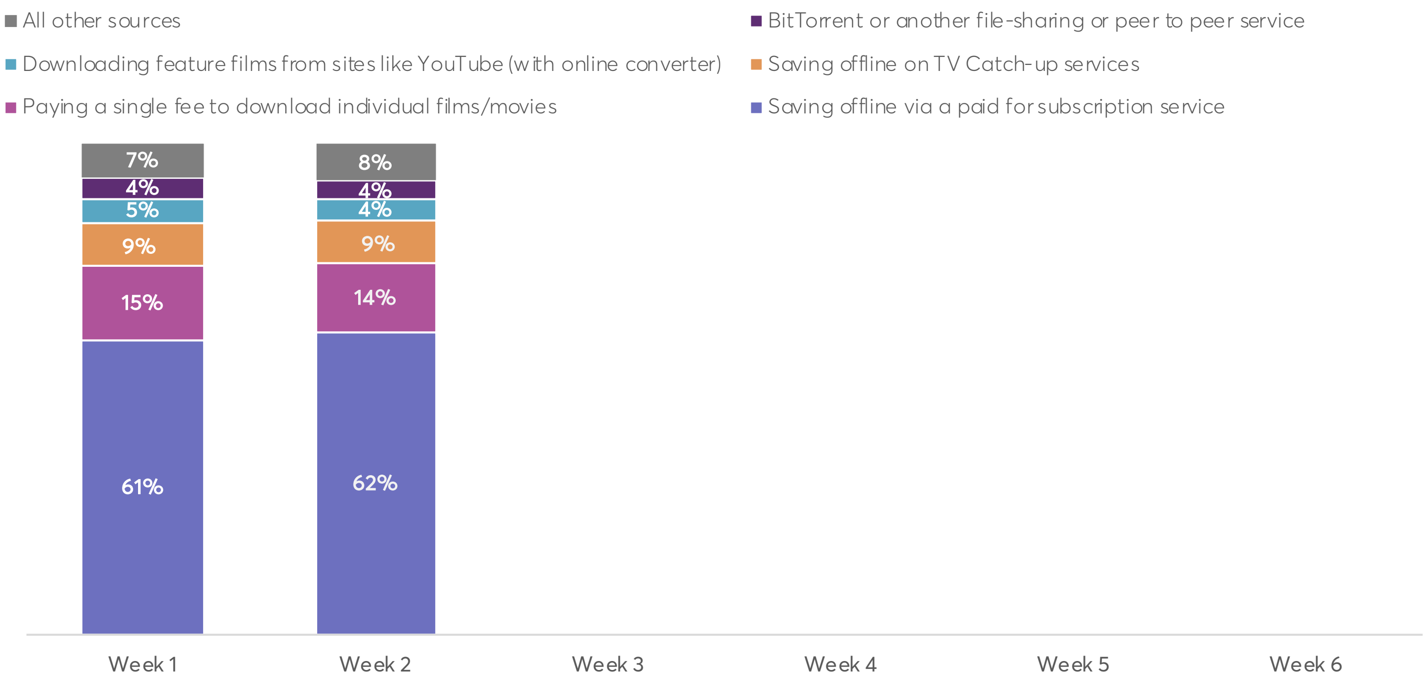

### Downloading activity:




### Downloading sources:




### Share of downloading across sources:

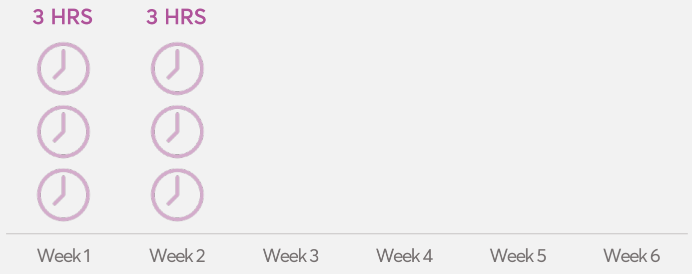



Base: Wave 2 – 'Downloading activity' (Total sample, n=2,792), 'Median number of downloads in past week', 'Downloading sources' and 'Share of downloading across sources' (Weekly film downloaders, n=709-728))

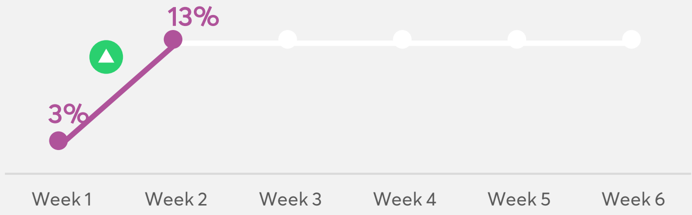
CATEGORY 02

# Film

### Median time spent watching films each day:

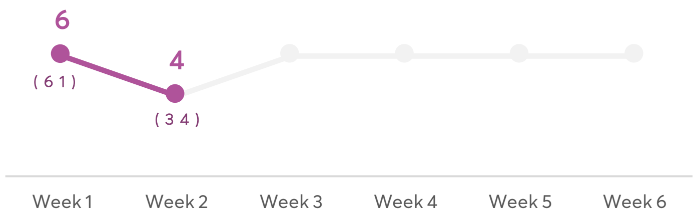



### Physical purchasing:

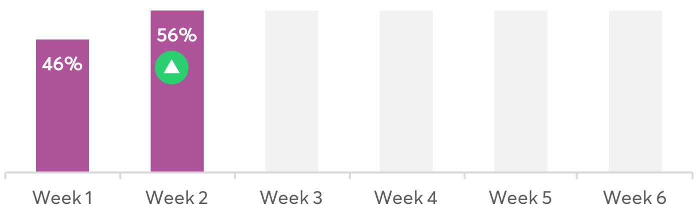



## STREAMING

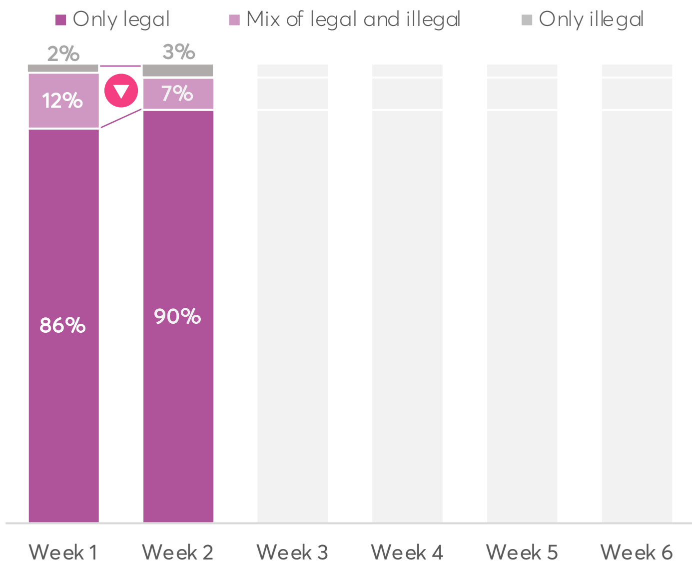
### Median hours spent streaming in past week
(or minutes per day):



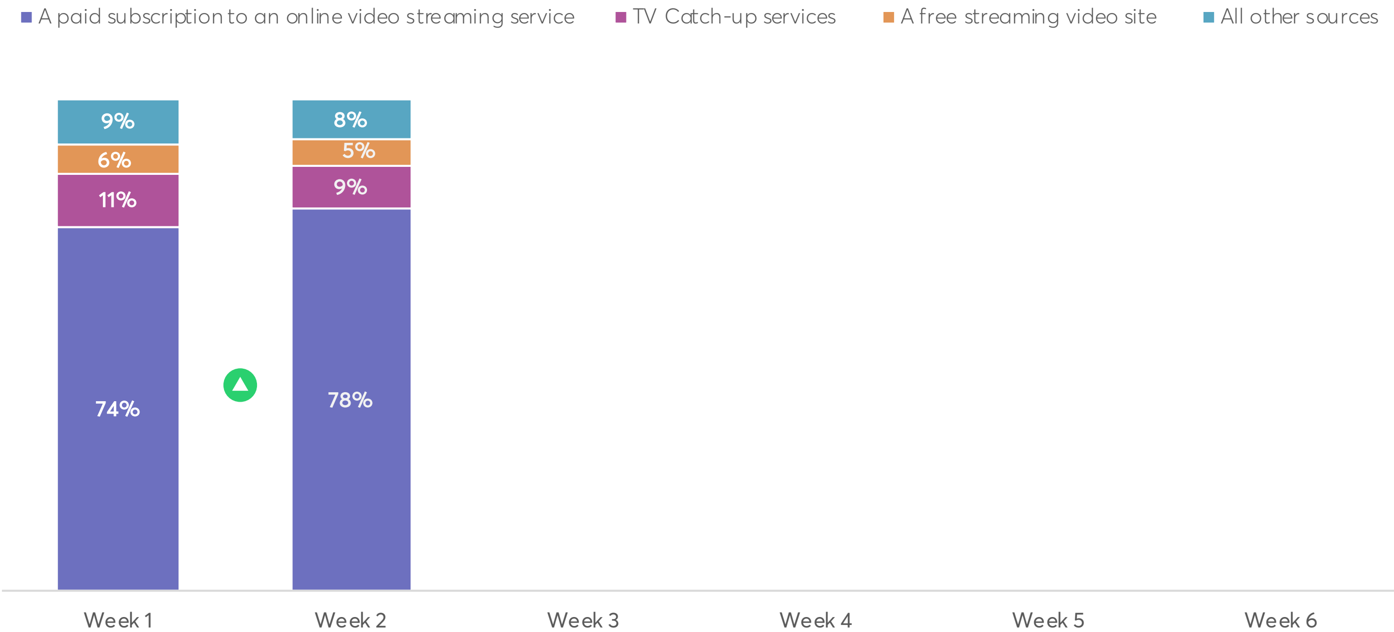

### Streaming activity:




### Streaming sources:




### Share of streaming across sources




Base: Wave 2 – 'Streaming activity', 'Physical purchasing' (Total sample, n=2,792), 'Median time spent watching films each day' (Downloaded, streamed, or purchased films in past week, n=1,637), 'Median hours spent streaming in past week', 'Streaming sources' and 'Share of streaming across sources' (Weekly film streamers, n=1,399-1,406)

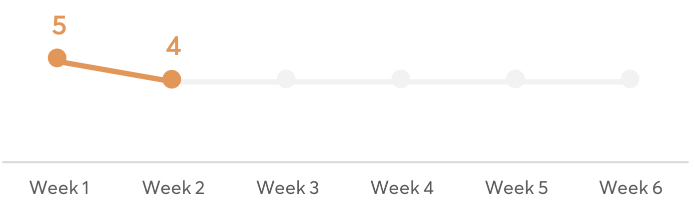
CATEGORY 03

# TV

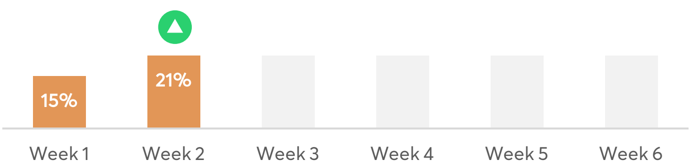
- Median hours spent watching TV decreased by 30 minutes to 3.5 hours per day.
- The number of respondents downloading TV shows increased by 6 percentage points to 21%, however the median number of downloads dropped from 5 to 4.
- There was little difference in the proportion using partly or wholly illegal downloading sources week on week.
- There were no noteworthy changes in the share of downloading across sources.
- The number of respondents streaming TV increased by 11 points to 53%. The median number of hours spent streaming per week decreased from 8 to 5.
- The proportion using partly or wholly illegal streaming sources decreased slightly from 11% to 8%. The proportion using only illegal sources remained similar, while those using a mix of legal and illegal streaming sources decreased, by 4 percentage points to 5%.
- There were no noteworthy changes in the share of streaming across sources.
- There was a 5 percentage point increase in the proportion of those who made a physical purchased (to 7%).

## DOWNLOADING

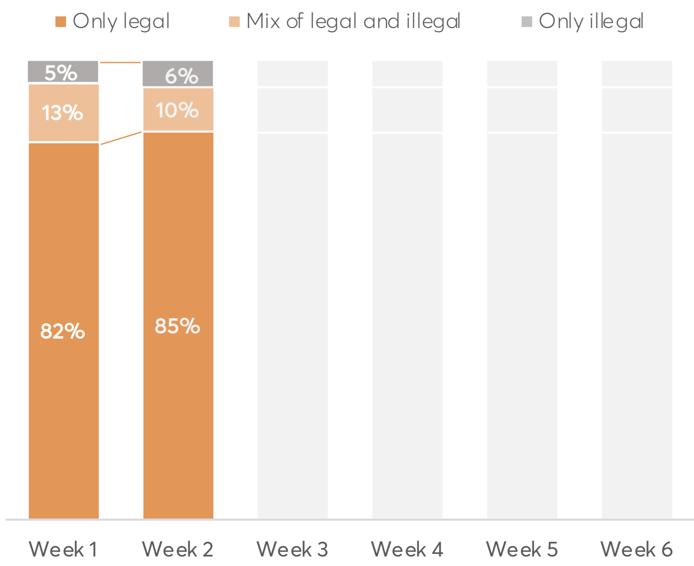
### Median number of downloads in past week:



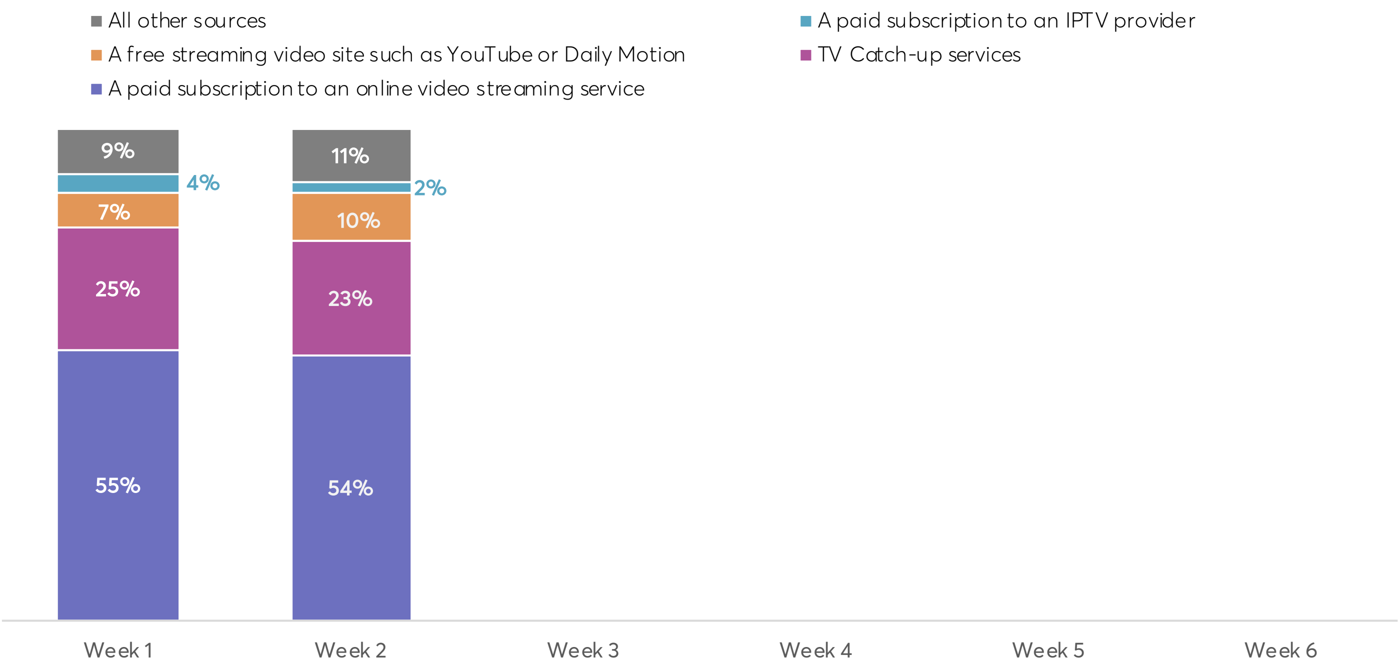

### Downloading activity:




### Downloading sources:




### Share of downloading across sources

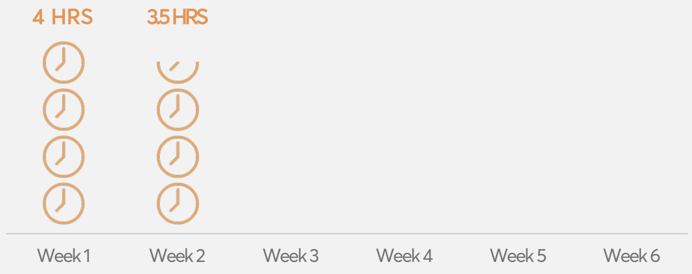



Base: Wave 2 – 'Downloading activity' (Total sample, n=2,792), 'Median number of downloads in past week', 'Downloading sources' and 'Share of downloading across sources' (Weekly TV downloaders, n=584-604)

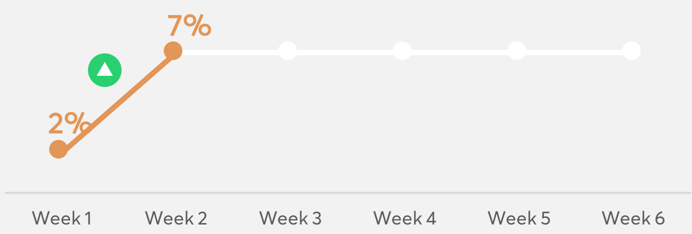
CATEGORY 03

# TV

## Median time spent watching TV each day:

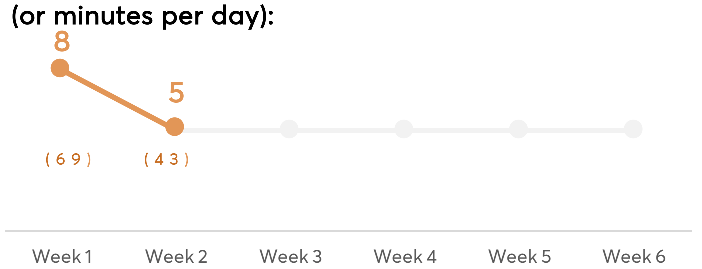



## Physical purchasing:

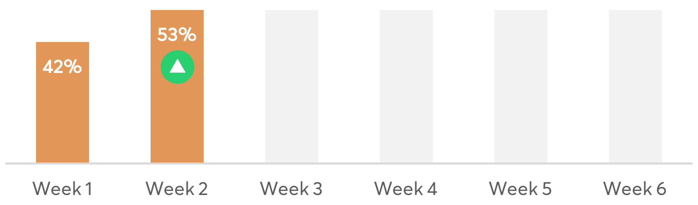



## STREAMING

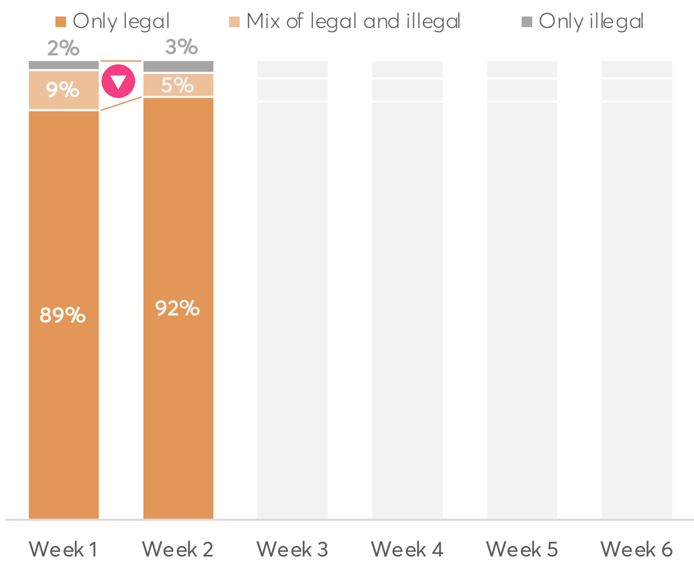
### Median hours spent streaming in past week (or minutes per day):



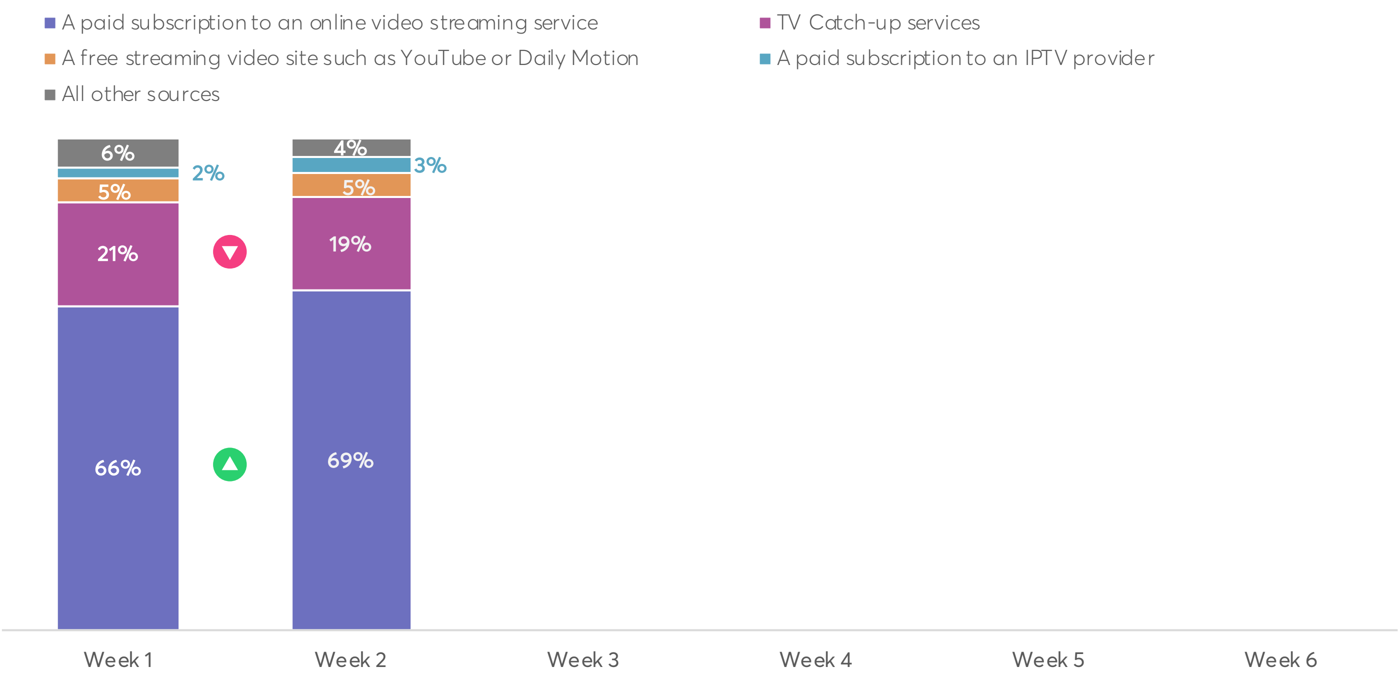

### Streaming activity:




### Streaming sources:




### Share of streaming across sources

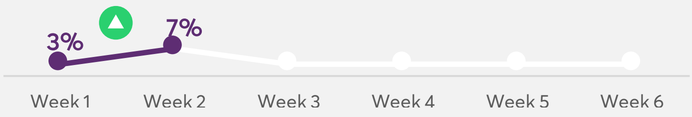


CATEGORY 04

# Video Games

## Median time spent playing video games each day:

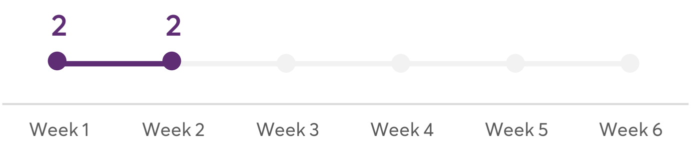

## Physical purchasing:



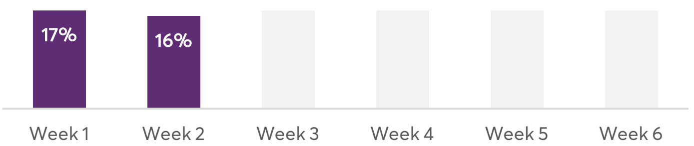

- Median hours spent playing video games remained at 3 hours per day.
- The number of respondents downloading/accessing remained level at 16%. The median number of games downloaded/accessed also remained unchanged at 2 per week.
- The proportion using partly or wholly illegal downloading sources decreased from 13% to 8%. The proportion using only illegal sources remained static at 2%, while the number using a mix of legal and illegal downloading sources decreased, by 5 percentage points to 6%.
- There was a 4 percentage point increase in the proportion of those who made a physical purchase (to 7%).

## DOWNLOADING/ACCESSING

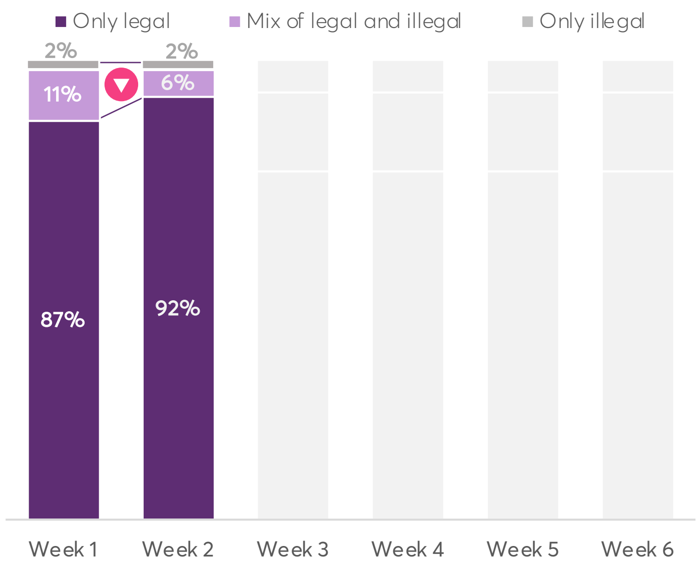
### Median number downloaded/accessed in past week:



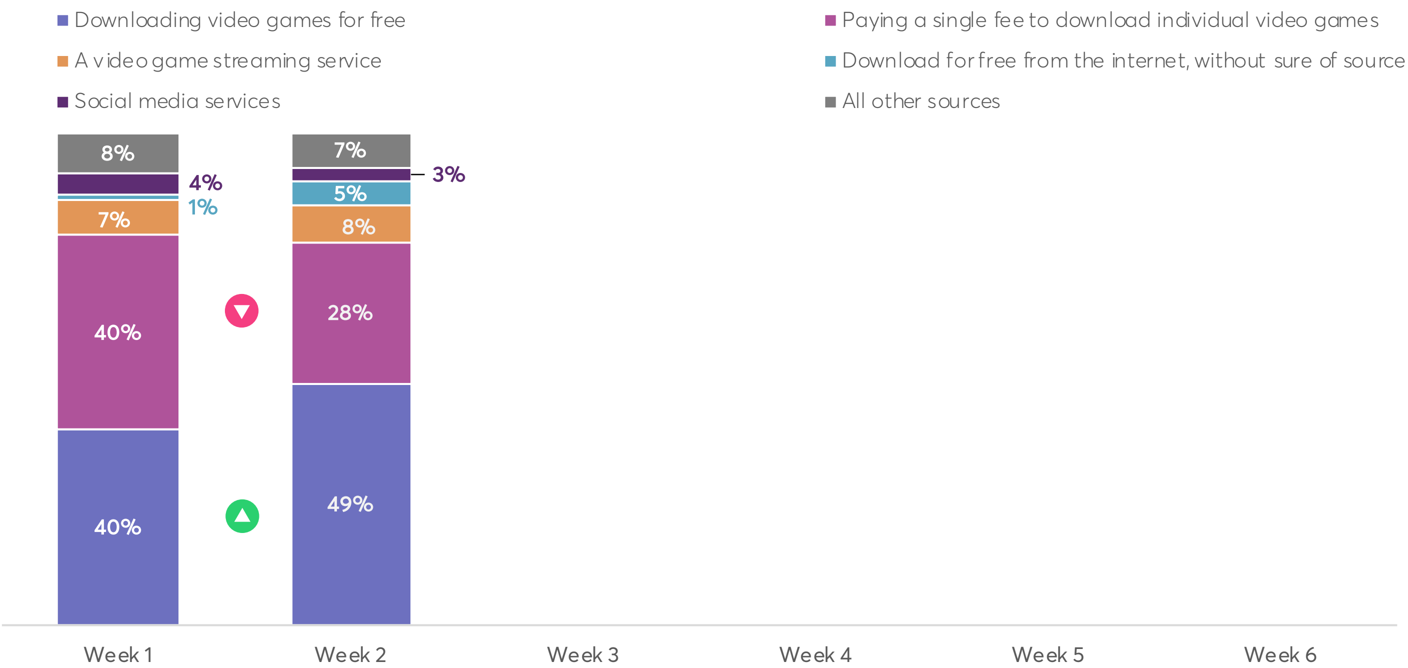

### Downloading/accessing activity:




### Downloading/accessing sources:




### Share of downloading/accessing across sources




Base: Wave 2 – 'Downloading/accessing activity', 'Physical purchasing' (Total sample, n=2,792), 'Median time spent playing games each day' (Downloaded, streamed, or purchased video games in past week (n=517), 'Median hours spent downloading/accessing in past week', 'Streaming sources' and 'Share of downloading/accessing across sources' (Download/access video games weekly, n=420-443)

CATEGORY 05

# E-publishing

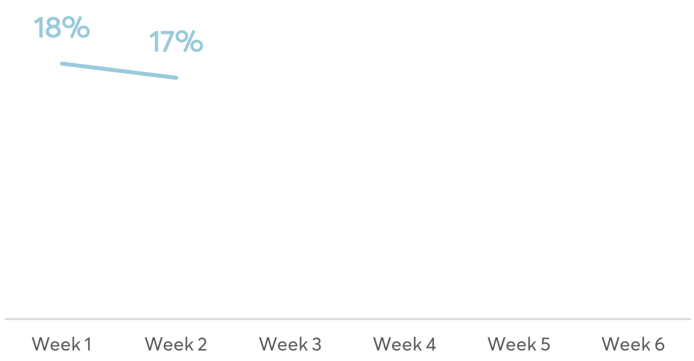
- Median hours spent reading remained at 2 hours per day for books and 1 hour for digital magazines. Time spent listening to audiobooks increased from a median of 1 hour per day to 2.
- 17% had downloaded or accessed an **e-book** which was unchanged from the previous week.
- The proportion using partly or wholly illegal downloading sources remained fairly static week on week for e-books. Looking at the share of sources used to access e-books, while "Paying a single to download individual e-books" was still dominant, this saw a decline of 6 percentage points (to 46%), while accessing via "subscription services" saw an increase of 5 percentage points (to 21%).
- Physical purchasing increased across the three categories.
- 9% had downloaded or accessed a **digital magazine**, which was an increase of 3%.
- The proportion using partly or wholly illegal downloading sources to download digital magazines, decreased from 26% to 20%. While the proportion using only illegal sources increased 2 percentage points to 13%, the number using a mix of legal and illegal downloading sources decreased, by 8 percentage points to 7%.
- There were few differences in the share of sources used to access digital magazines. "Accessing content made available for free by publishers on their own social media or website" was the only category that saw a notable change, increasing by 4 percentage points to (28%).
- 7% had downloaded or accessed an **audiobook**, which was unchanged from the previous week. The number using only legal sources remained similar at 82%.
- The proportion using partly or wholly illegal downloading sources remained fairly static week on week for audio-books. While the proportion using only illegal sources increased 3 percentage points to 12%, the number using a mix of legal and illegal downloading sources decreased, by 4 percentage points to 6%.
- The share of sources used to access audiobooks saw a slight decline for subscription services (to 30% from 36%), while "Accessing content made available for free by publishers on their own social media or website" doubled from 7% to 14%.

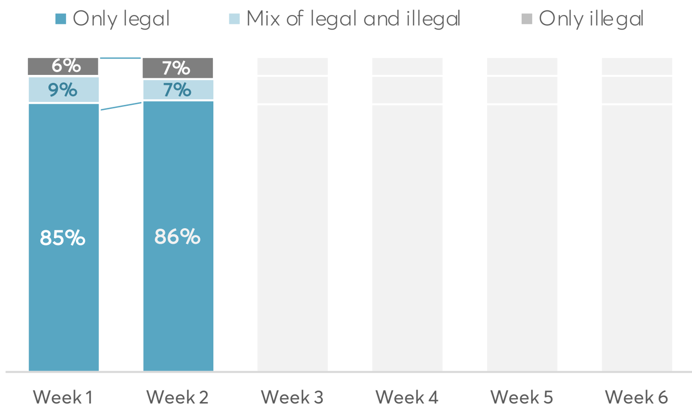
## DOWNLOADING/ACCESSING

**Downloading/accessing activity:**

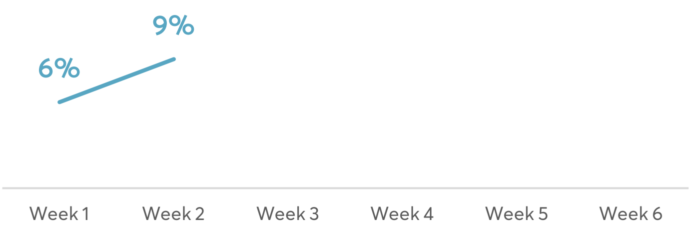
**Downloading/accessing sources:**

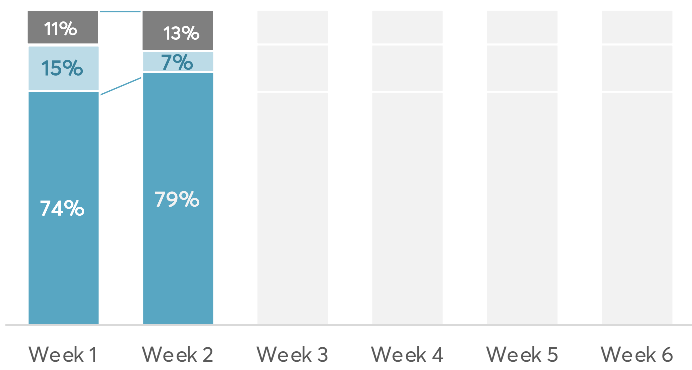
### E-BOOKS



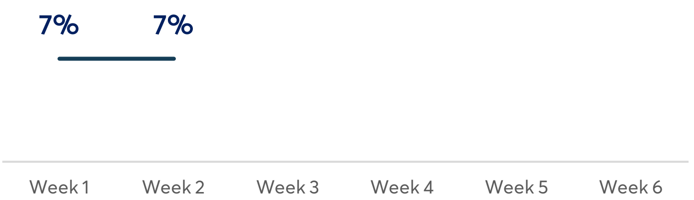



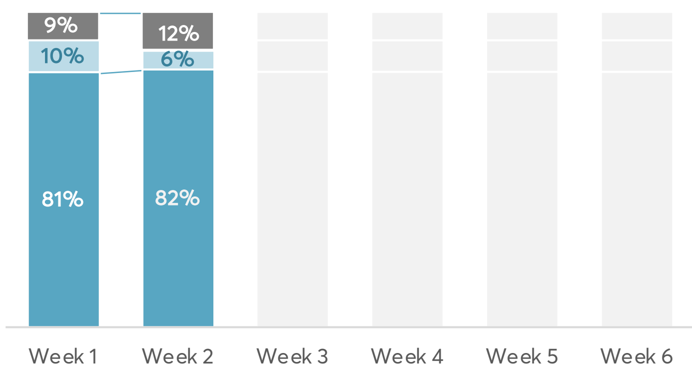

### DIGITAL MAGAZINES




### AUDIOBOOKS




Base: Wave 2 – 'Downloading/accessing activity', (Total sample, n=2,792), 'Downloading/accessing sources' (Weekly E-book consumers n=428, Weekly Digital magazine consumers n=218, Weekly Audiobook consumers n=182)

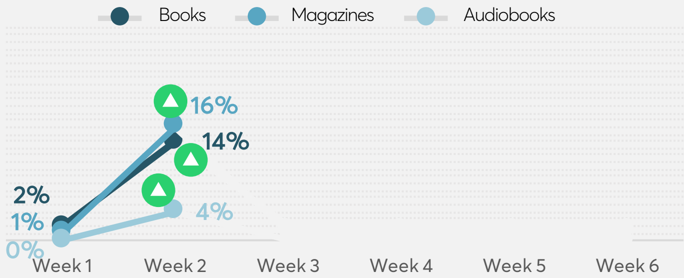
CATEGORY 05

# E-publishing

## Median time spent reading/listening each day:

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

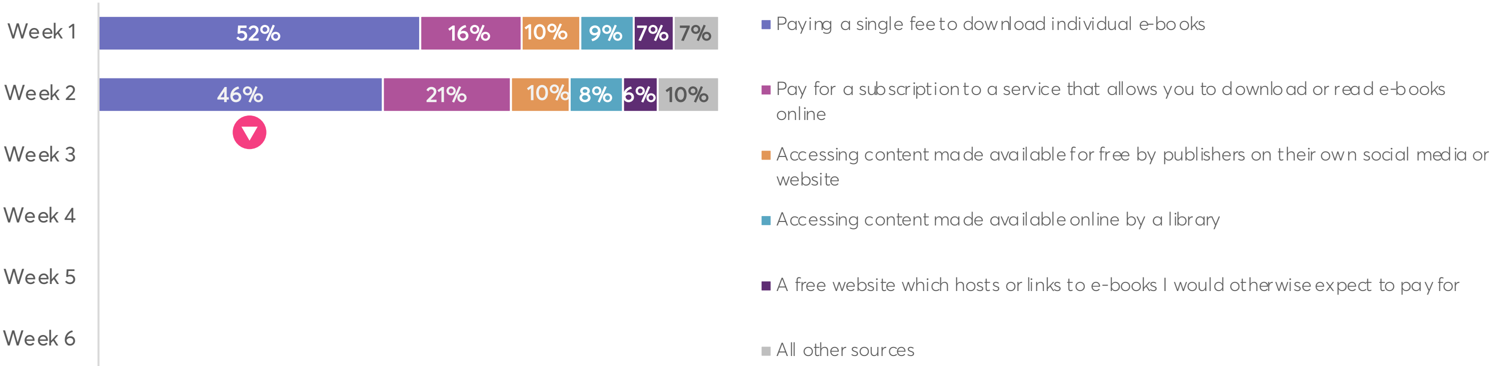
## Physical purchasing:



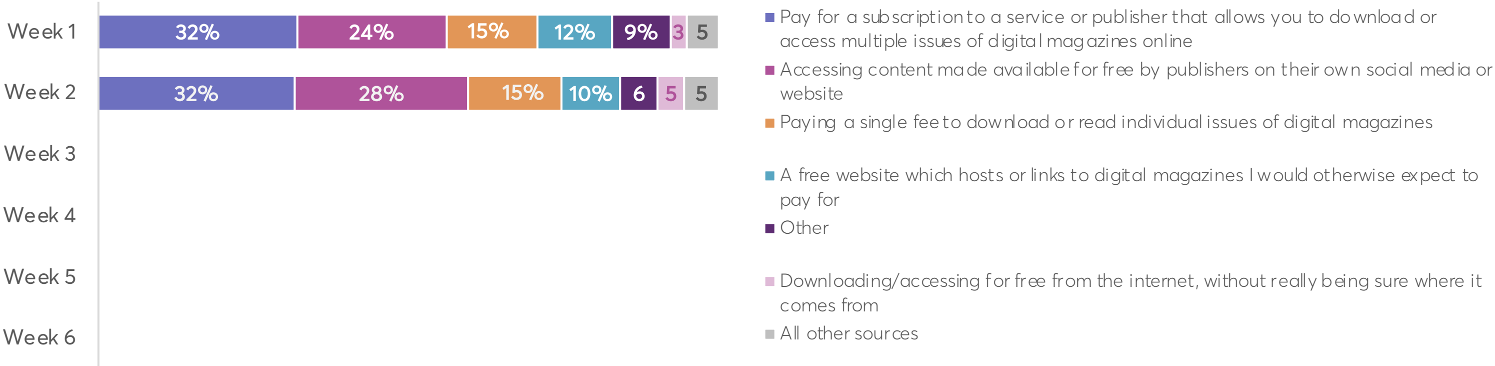

## DOWNLOADING/ACCESSING

### Share of downloading/accessing across sources

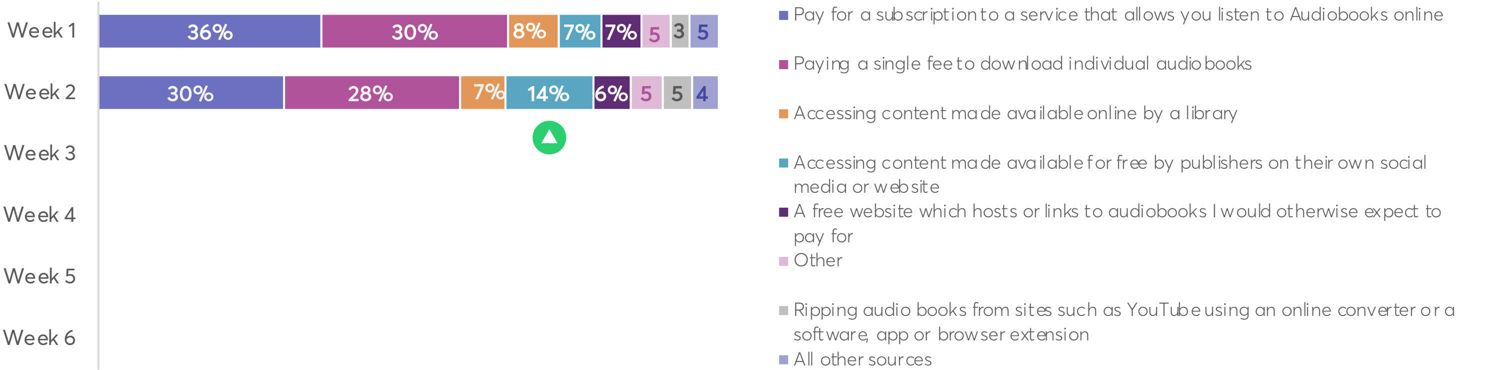
### E-BOOKS




### DIGITAL MAGAZINES




### AUDIOBOOKS




Base: Wave 2 – 'Physical purchasing' (Total sample, n=2,792), 'Median time spent reading/listening each day' (Downloaded, streamed, or purchased in past week – E-books n=428, Digital magazines n=218, Audiobooks n=182), 'Share of downloading/accessing across sources' (Weekly E-books consumers n=664, Weekly Digital magazine consumers n=571, Weekly Audiobooks consumers n=223)

# Other content consumption

**01. CONTENT THAT PEOPLE READ OR WATCH:**

The shift in week 2 from week 1 was small for each category. Directionally, all (but one) showed an increase of 1 or 2 percentage points.

**02. SOCIAL AND WORK-RELATED INTERACTIONS:**

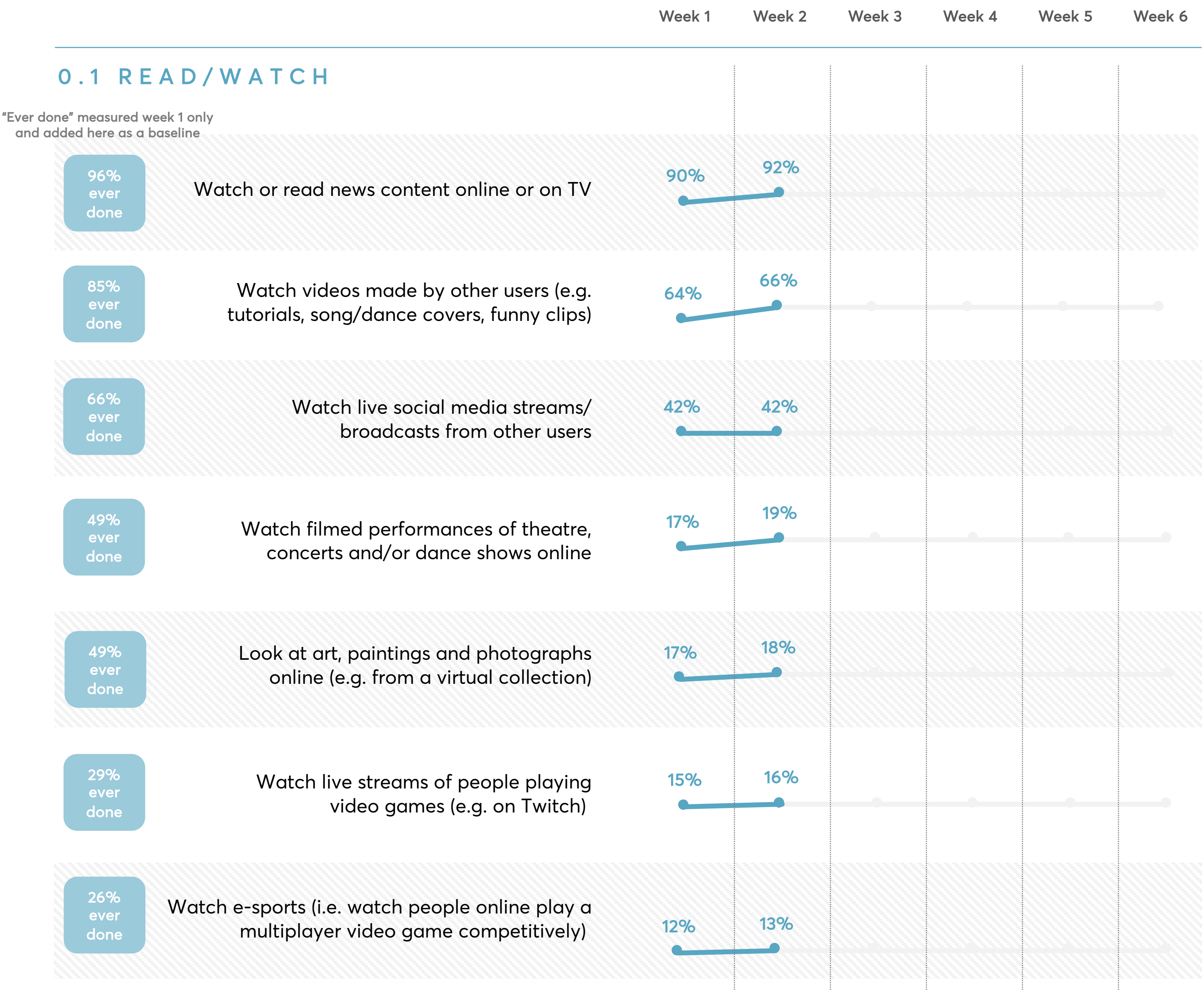
The shift in week 2 from week 1 was small for each category. Directionally, they all showed an increase of 1 or 2 percentage points.

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

The shift in week 2 from week 1 was small for each category. But unlike the other groups, directionally, all showed a <u>decrease</u> of 1 or 2 percentage points.

**04. CREATING AND SHARING CONTENT**

The shift in week 2 from week 1 was small. "Sharing videos/images not created by you" and "create and post your own content…" showed a two percentage point increase each, while making "content you own… publicly available" remained the same.




Base: Wave 2 Total sample (n= 2,792)

# Other content consumption

## 0.2 INTERACT WORK/SOCIAL

| | | Week 1 | Week 2 | Week 3 | Week 4 | Week 5 | Week 6 |
|---|---|---|---|---|---|---|---|
| 82% ever done | Look at, comment on, or 'like' social media posts from other users | 71% | 73% | | | | |
| 68% ever done | Use video software for social activities with friends/family | 51% | 53% | | | | |
| 57% ever done | Look at, comment on, or 'like' social media content posted by celebrities | 39% | 40% | | | | |
| 38% ever done | Conduct work meetings via video software | 26% | 28% | | | | |

## 0.3 ACTIVELY PARTICIPATE

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

## 0.4 CREATE/SHARE

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

Base: Wave 2 Total sample (n= 2,792)

# Digital Culture - Consumer Tracking Study

WAVE 2 OF 6 | MAY 2020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