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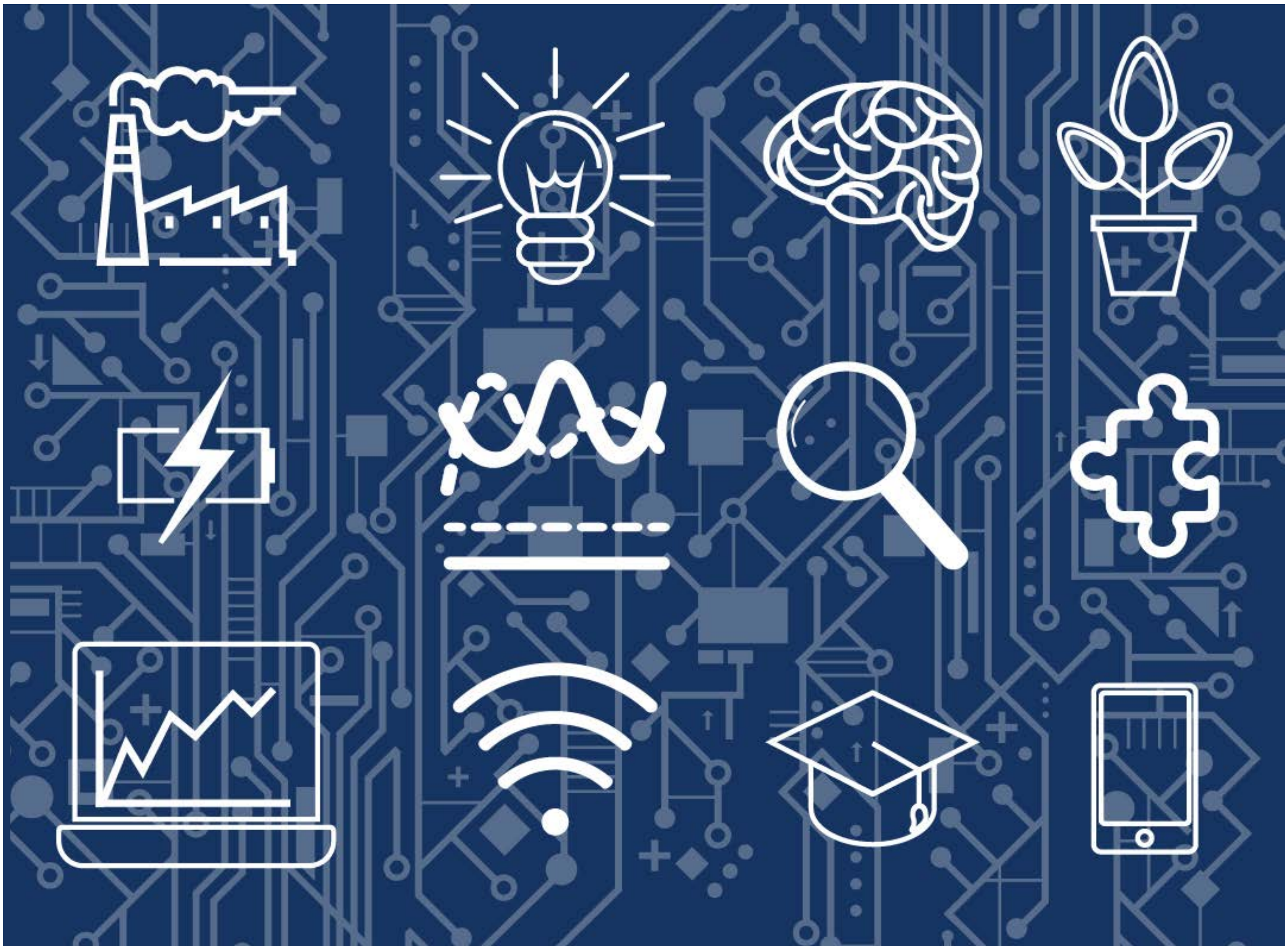
Online Copyright Infringement Tracker

Latest wave of research (March 2020)
Overview and Key findings



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Founded in July 2011, AudienceNet's reputation for innovative, "real-time" research grew steadily from its start-point in the music, entertainment and technology industries, through a wide range of both public and private sector organisations, governments, NGOs and philanthropic organisations.

AudienceNet has built a reputation as one of the primary sources of intelligence on music and entertainment. We conduct ad-hoc and (global) tracking projects for industry bodies such as the IFPI, Entertainment Retail Association (ERA) and the BPI, as well as major record labels (Universal, Warner and Sony) and platforms such as SoundCloud and Spotify.

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Executive Summary

This wave of the research was asking about a period markedly different from previous years. For much of the time-period respondents were being asked to reflect on (i.e. the previous three months) and during the time of fieldwork, the UK (and much of the world) was in a state of lockdown owing to the COVID-19 pandemic. Many data points, perhaps as a result, appear to have shifted when compared to last year's study.

OVERALL SUMMARY

- **Consumption (i.e. downloading or streaming content** online) was consistent across a number of categories compared to last year. There were some key differences which included a decline in the proportion of our sample who had downloaded music and TV. There was also a decline in the proportion who had streamed live sport and an increase in those streaming films.
- **Passion for the content categories** remained robust during the COVID-19 pandemic with respondents agreeing that many of them played a central role in their lives.
- **The main drivers for online consumption were cost, the choice available and the convenience** of being able to consume content whenever they want.
- **The overall level of infringement for all content categories (excluding digital visual images) was at 23%,** which is 2% lower than where it had been for the previous four years.

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Notable changes in consumption

Compared to 2019

- The proportion who had streamed films over the previous three months was up by 8% to 42% - the highest it has been over the past six years and matches the proportion of those who had streamed TV. The amount of legal content consumed in both categories also increased while the amount of illegal content either remained the same or decreased.

TV streamers over the past three months (average number of legal hours):

2019	2020
93 hours	122 hours

Film streamers over the past three months (average number of legal hours):

2019	2020
57 hours	77 hours

- The proportion who had downloaded music was down (by 8% to 23%) compared to last year, with the proportion streaming remaining broadly unchanged (3% decrease to 37%). Despite a decrease in the overall proportion downloading, the volume of tracks downloaded by both legal and illegal methods per respondent increased.

Music tracks downloaded legally over the past three months (average):

	2019	2020
Legal	75	80
Illegally	10	21

- The proportion who had streamed live sport had almost halved compared with last year.

% who had streamed live sport:

2019	2020
14%	8%

Infringement levels

OVERALL INFRINGEMENT LEVEL

23%

Below average infringement levels

TV, audiobooks and video games were notably lower than average infringement levels.

TV: 14%

Audiobooks: 14%

Video games:11%

Average infringement levels

Film, software, music and e-books were around, or just below, average infringement levels

Film: 20%

Software: 20%

Music:18%

E-books: 17%

Above average infringement levels

Above average infringement levels were seen for live sports and digital magazines.

Live sports: 37%

Digital magazines: 28%

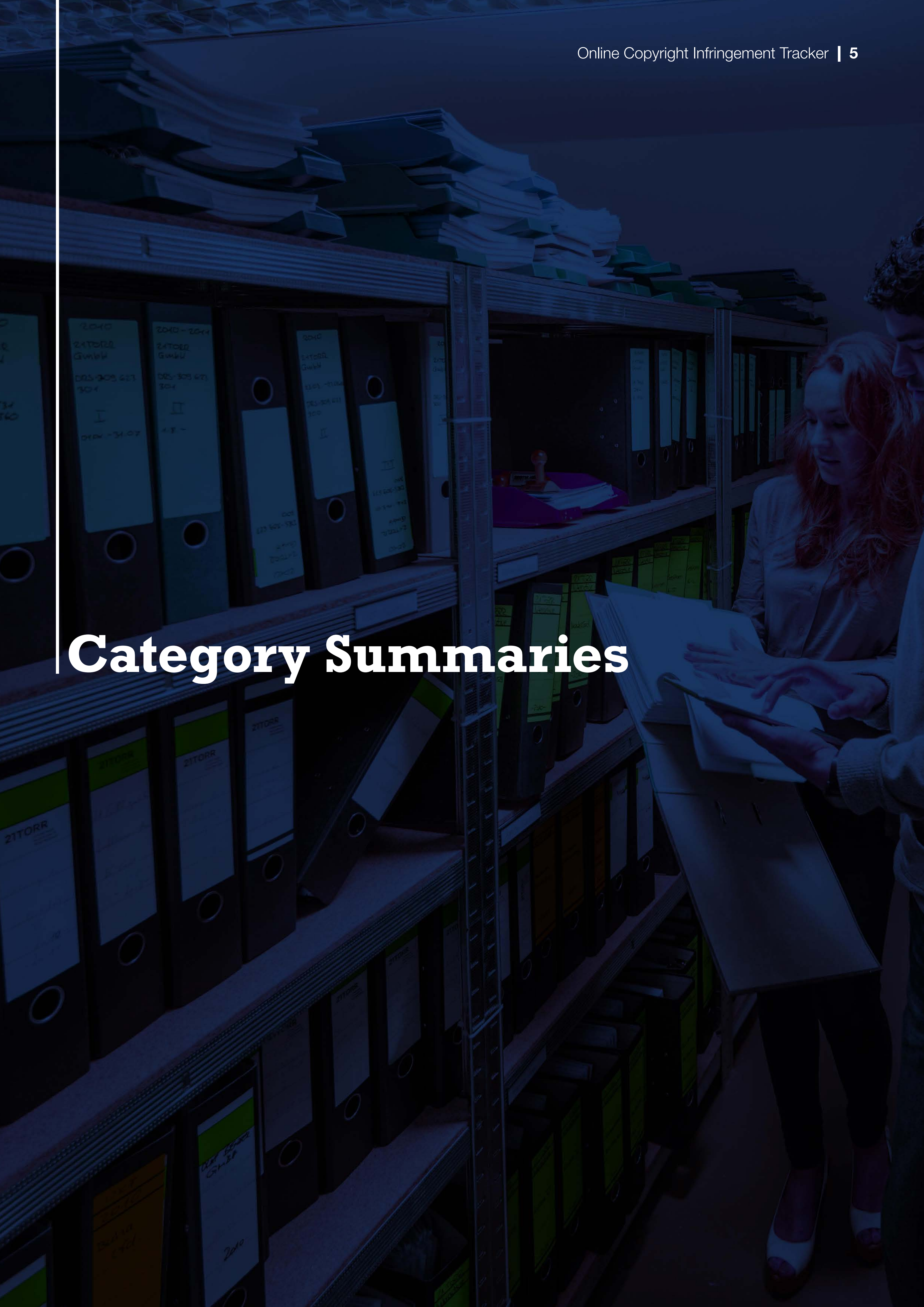
Qualitative Summary

In the qualitative phase of research, respondents elaborated on the peculiarities and extraordinary circumstances of this year, detailing some of the surprising benefits as well as the challenges and struggles which came with the experience of lockdown. Those who had been furloughed reported a definite increase in their consumption of their favourite forms of entertainment while those who were still working and studying mostly noted their consumption had remained relatively consistent.

The reason for an increase in entertainment consumption among those with lots of free time during lockdown was the comfort and distraction found in activities such as reading, listening to music, watching films and playing video games etc. Respondents relied upon these activities to fill their time from a practical perspective but also to take their mind off the real world and to help combat stress, boredom and anxiety.

In terms of levels of infringement, the findings from the qualitative phase showed that while many reported no change in their use of illegal sources, some noted that owing to their general consumption in entertainment increasing, so too did their use of illegal sources. Motivations for doing so remained consistent with those uncovered in the previous wave (2019); a lack of access to specific content on streaming subscriptions they use, availability on existing entertainment subscriptions and/or an unwillingness to pay additional costs for content outside of what they already pay for.

The closing exercise of the Online Community focused on potential communication materials and messages to try and encourage behaviour change around online infringement. Using the segmentation of respondents established in last year's study, this exercise showed that a number of types of messages were effective for 'Cautious Infringers' - those who are uneasy and unsure about illegally accessing content, highlighting the need for education and awareness. Yet, it emerged that in order to try and reach those who are harder to engage in behaviour change, i.e. the 'Savvy Infringers', the most effective way to talk about the consequences of infringement was by focusing on the impact on the individual - both within the industry as well as the impact on the individual consumer through risks to their own hardware and devices.



Category Summaries

Music

Engagement with music

Streaming was the most common method of accessing music, with 37% having done so in the past three months. Downloading followed at 23%, with notably fewer having purchased physical music (11%).

While **streaming music remained relatively stable** compared to last year (a decline of 3%) downloading and physical purchases experienced steeper declines of 8% and 9% respectively.

Streamed
37%
(-3%)

Downloaded
23%
(-8%)

Physical Purchases
11%
(-9%)

(+/- compared to OCI 2019)

Infringement

The overall level of infringement (i.e. anyone who had used an illegal source for music in the past three months) remained consistent, from **20% in 2019 to 18% in 2020**. The only notable shift in the type of infringement was in the decline of those using only legal sources to **download music**.

Downloaders and streamers	Only legal 82% (+2%)	Mix 16% (-2%)	Only Illegal 2% (0%)
Downloading	Only legal 66% (-4%)	Mix 18% (+2%)	Only Illegal 16% (+1%)
Streaming	Only legal 99% (+1%)	Mix 1% (-1%)	Only Illegal 0% (0%)

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Film

Engagement with film

Streaming was the most common method of accessing films, with 42% having done so in the past three months. Downloading followed, some way behind, at 18%, with slightly fewer having purchased physical copies (9%).

Streaming saw a noteworthy increase compared to last year (8% growth). Downloading remained stable (a 1% increase) while physical purchasing saw a decline of 9%

Streamed
42%
(+8%)

Downloaded
18%
(+1%)

Physical Purchases
13%
(-9%)

(+/- compared to OCI 2019)

Infringement

The overall level of infringement (i.e. anyone who had used an illegal source for films in the past three months) experienced a large decline going from **27% in 2019 to 20% in 2020**. The main notable shift in the type of infringement was the increase in those using only legal sources .

Downloader and streamers	Only legal 80% (+7%)	Mix 17% (-5%)	Only Illegal 3% (-1%)
Downloading	Only legal 77% (+2%)	Mix 14% (0%)	Only Illegal 9% (-2%)
Streaming	Only legal 84% (+6%)	Mix 13% (-2%)	Only Illegal 2% (-1%)

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TV

Engagement with TV

Streaming was the most common method of accessing TV, with 42% having done so in the past three months. Downloading followed, some way behind, at 16%, with relatively few having purchased physical copies (4%).

Downloading saw a noteworthy decrease compared to last year, falling by 7%. Streaming remained stable with no change while physical purchasing saw a modest decline of 2%.

Streamed/accessed
42%
(-0%)

Downloaded
16%
(-7%)

Physical purchases
4%
(-2%)

(+/- compared to OCI 2019)

Infringement

The overall level of infringement (i.e. anyone who had used an illegal source for music in the past three months) experienced a small decline going from **17% in 2019 to 14% in 2020**. There was no notable shift compared to last year in terms of the type of infringement with a slight increase in those using only legal sources.

Downloaders and streamers	Only legal 86% (+3%)	Mix 12% (-2%)	Only Illegal 2% (0%)
Downloading	Only legal 82% (=2%)	Mix 11% (+1%)	Only Illegal 6% (+1%)
Streaming	Only legal 89% (+3%)	Mix 9% (-2%)	Only Illegal 1% (-1%)

Live Sport

Engagement with live sport

Streamed/accesseed

8%

(-2%)

Among the total sample, 8% had streamed live sport in the past three months. This represented a **6% decrease** compared to last year.

(+/- compared to OCI 2019)

Infringement

The overall level of infringement (i.e. anyone who had used an illegal source for live sport in the past three months) experienced a small increase going from **34% in 2019 to 37% in 2020**. Compared to last year there was a decline in those using only legal sources.

Downloaders and streamers	Only legal	Mix	Only Illegal
	63% (-4%)	25% (+2%)	13% (+2%)

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Video Games

Engagement with video games

Downloading was the most common method of accessing video games, with 16% having done so in the past three months. Streaming followed at 11%, with marginally fewer having purchased physical copies (9%).

Downloading remained relatively stable compared to last year (a 2% decline) while streaming/accessing remained at exactly the same level. Physical purchases experienced a decline of 4%.

Downloaded
16%
(-2%)

Streamed/accessed
11%
(0%)

Physical Purchases
9%
(-4%)

(+/- compared to OCI 2019)

Infringement

The overall level of infringement (i.e. anyone who had used an illegal source for video games in the past three months) experienced an **increase, from 6% in 2019 to 11% in 2020**. Compared to last year there was a decline in those using only legal sources.

Downloaders or Streamers/Accessors	Only legal 89% (-5%)	Mix 8% (+3%)	Only Illegal 2% (+1%)

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Software

Engagement with software

Downloading was the most common method of accessing software, with 18% having done so in the past three months. Streaming followed, some way behind, at 8%, with fewer having purchased physical copies (4%).

Downloading remained relatively stable compared to last year (a 2% decline) as did streaming and physical purchasing (both experienced a 1% decline).

Downloaded
18%
(-2%)

Streamed/accessed
8%
(-1%)

Physical Purchases
4%
(-1%)

(+/- compared to OCI 2019)

Infringement

The overall level of infringement (i.e. anyone who had used an illegal source for software in the past three months) experienced a **small increase going from 18% in 2019 to 20% in 2020**. There were no notable shifts compared to last year in terms of the type of infringement.

Downloaders or Streamers/Accessors	Only legal	Mix	Only Illegal
	80% (-2%)	8% (+1%)	12% (+1%)

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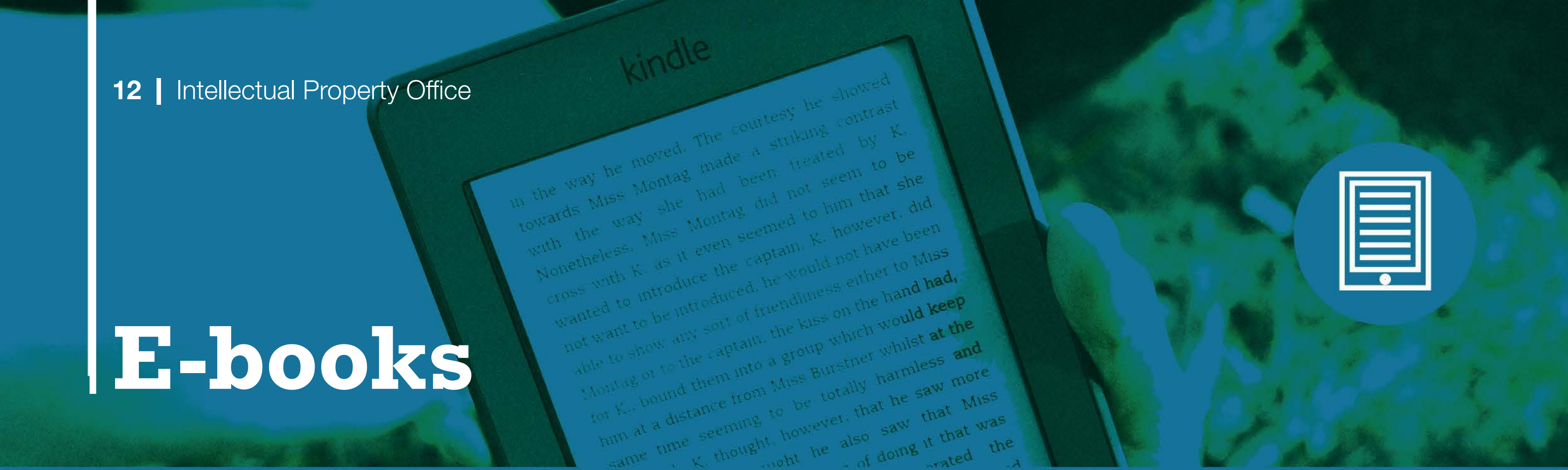

E-books

Engagement with E-books

Physical purchasing was the most common method of accessing books (i.e. physical books or e-books), with 26% having done so. This was followed closely by downloading (20%), with streaming/accessing (8%) some way behind.

Physical Purchases
26%

Downloaded
20%

Streamed/accessed
8%

Infringement

The overall level of infringement (i.e. anyone who had used an illegal source for e-books in the past three months) was **17% this year**. The proportion who had used only illegal sources (7%) was only marginally lower than those who use a mix of legal and illegal (10%).

Downloaders or Streamers/Accessors	Only legal 83%	Mix 10%	Only Illegal 7%

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Digital Magazines

Engagement with magazine/digital magazines

Physical purchasing was the most common method of accessing magazines/digital magazines, with 12% having done so. This was followed, by some way, by downloading (6%) and streaming/accessing (5%).

Physical Purchases
12%

Downloaded
6%

Streamed/accessed
5%

Infringement

The overall level of infringement (i.e. anyone who had used an illegal source for digital magazines in the past three months) was **28% this year**. The proportion who had used only illegal sources (17%) was higher than those who had used a mix of legal and illegal (11%).

Downloaders or Streamers/Accessors	Only legal 72%	Mix 11%	Only Illegal 17%

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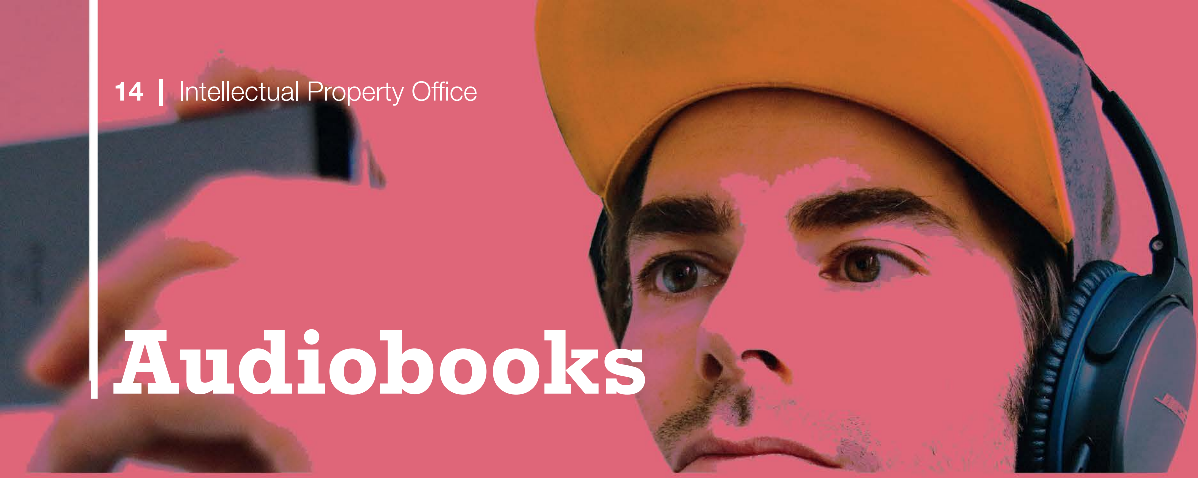


Audiobooks

Engagement with audiobooks

Downloading was the most common method of accessing audiobooks, with 8% having done so in the past three months. Streaming followed at 5%, with fewer having purchased physical copies (2%).

Downloaded
8%

Streamed/accessed
5%

Physical Purchases
2%

Infringement

The overall level of infringement (i.e. anyone who had used an illegal source for audiobooks in the past three months) was **14% this year**. The proportion who had used a mix of legal and illegal sources (8%) was similar to that of those who had used only illegal ones (6%).

Downloaders or Streamers/Accessors	Only legal 86%	Mix 8%	Only Illegal 6%

OCI 2020 – Overview and comparison of trends

This section provides an overview and comparison of key trends across each content category. It is based on the 2020 wave and includes yearly comparisons, where relevant. It covers engagement with online content, before looking in detail at levels of infringement, key characteristics of infringers and which legal sources they would be likely to migrate to.

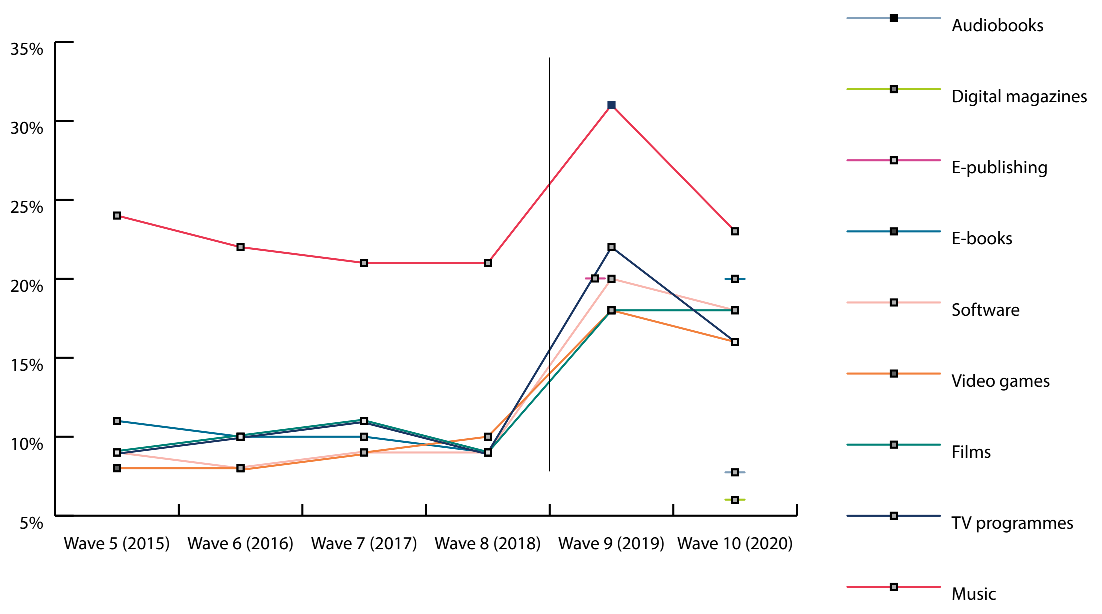
Consumption trends

Downloading

After a peak last year in all categories in the number of respondents who had downloaded content in the previous three months, this year there were either declines or consistent results. The proportion downloading remained higher for most categories than those before wave 8.

- The largest declines were for music (-8%) and TV (-6%).
- There were small declines in software (-2%) and video games (-2%) and no change in films.
- The proportion who had downloaded e-books (20%) was more than double the last time it was included (in 2018 when it was 9%).
- Audiobooks and digital magazines (both new categories) had been downloaded by 8% and 6% of the sample respectively.

Have you downloaded any of the following through the internet in the past 3 months? By downloaded we mean transferring/saving a copy of a file onto your device (e.g. computer, laptop, smartphone etc.)



	Wave 5 (2015)	Wave 6 (2016)	Wave 7 (2017)	Wave 8 (2018)	Wave 9 (2019)	Wave 10 (2020)
Music	24%	22%	21%	21%	31%	23%
TV programmes	9%	10%	11%	9%	22%	16%
Films	9%	10%	11%	9%	18%	18%
Video games	8%	8%	9%	10%	18%	16%
Software	9%	8%	9%	9%	20%	18%
E-Books	11%	10%	10%	9%		20%
E-publishing					18%	
Digital magazines						6%
Audiobooks						8%

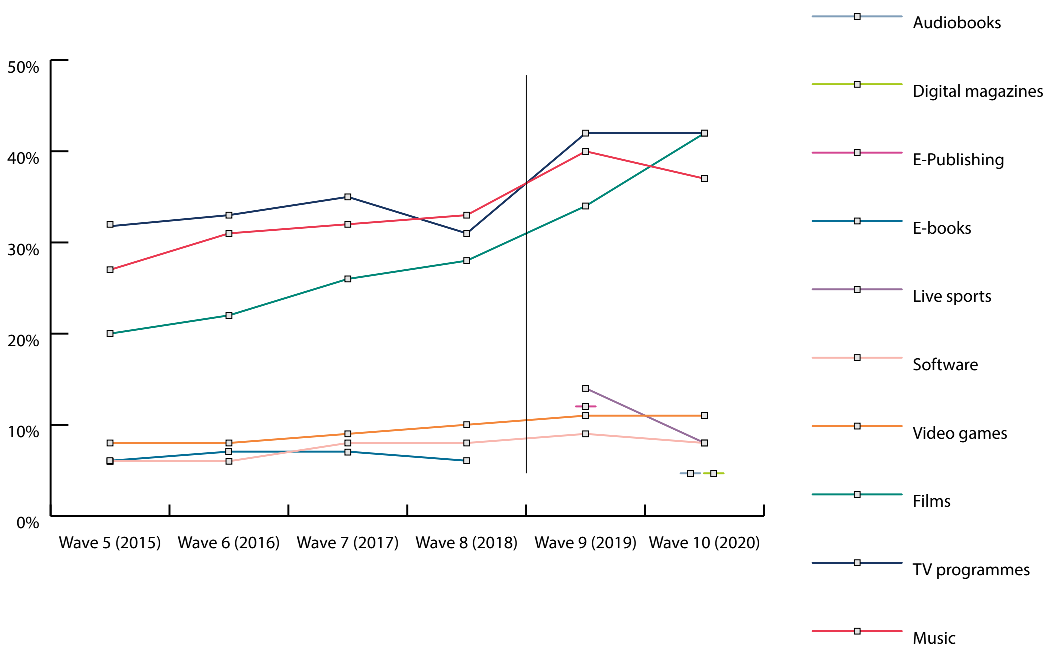
Base for Wave 10: n=5,004 (total sample). Break in the series between Wave 8 and Wave 9 represents change in methodology.

Streaming/accessing

From 2019 to 2020 the proportions who had streamed/accessed content online in the past 3 months differed markedly by category.

- The only increase was for films, which experienced large growth (+8% taking it to 42%). This continues the year-on-year growth that has been evident over the past six waves of the survey.
- The proportion streaming TV remained unchanged (also at 42%), while music experienced a small decline (-3%). In both instances they remained at, or near, their highest level over the past six waves.
- Considering the cessation of most live sport for much of the period in question it is no surprise that it fell by 6%, to 8%.
- Video games and software both remained largely unchanged from the previous year at 8% (-1%) and 11% (unchanged) respectively.
- E-books had a marginal 2% increase compared with when it was last included as an option two years ago.
- Audiobooks and digital magazines (both new categories) had been streamed/accessed by 8% and 6% respectively.

Have you streamed or accessed any of the following through the internet in the past 3 months? By this we mean that you viewed, listened or played them directly through the internet without downloading them onto your device (e.g. computer, laptop, smartphone etc.)



	Wave 5 (2015)	Wave 6 (2016)	Wave 7 (2017)	Wave 8 (2018)	Wave 9 (2019)	Wave 10 (2020)
Music	27%	31%	32%	33%	40%	37%
TV programmes	32%	33%	35%	31%	42%	42%
Films	20%	22%	26%	28%	34%	42%
Video games	8%	8%	9%	10%	11%	11%
Software	6%	6%	8%	8%	9%	8%
Live sports					14%	8%
E-Books	6%	7%	7%	6%		8%
E-publishing					12%	
Digital magazines						5%
Audiobooks						5%

Base for Wave 10: n=5,014 (total sample). Break in the series between Wave 8 and Wave 9 represents change in methodology.

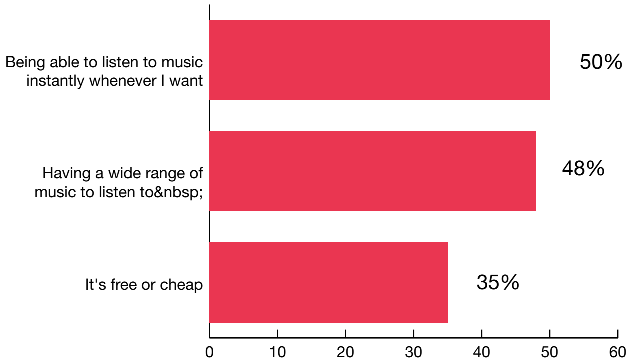
Reasons for accessing content online

For each category, respondents were asked what their top three reasons were for choosing to access content online. There were some recurring themes across many of the categories:

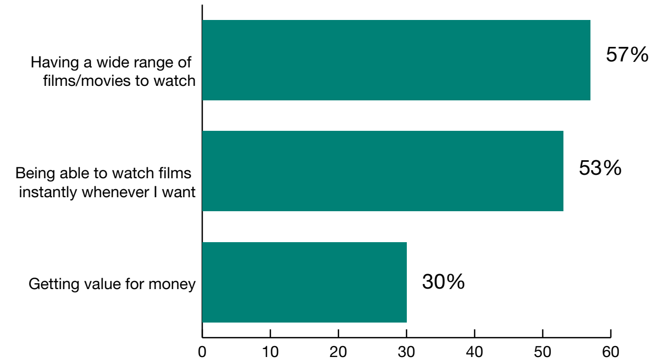
- **Cost** was a key aspect of why online access was considered appealing. It was present in the top three reasons for all content categories. In particular, the statement "It's free or cheap" was a popular choice and was the top reason for software, e-books and digital magazines.
- **Offering more choice** was also a strong theme. "Having a wide range" of content was the top reason for online consumption for films, live sport and audiobooks, and was in the top three for all except software and digital magazines.
- Online access was also thought to be **convenient**. Being able to consume content "instantly whenever I want" was the most selected reason in music and TV programmes/series, and in the top three for the rest.

What are the main reasons that you choose to access online (i.e. downloading or streaming)? Please select your top 3 (% of consumers in each category)

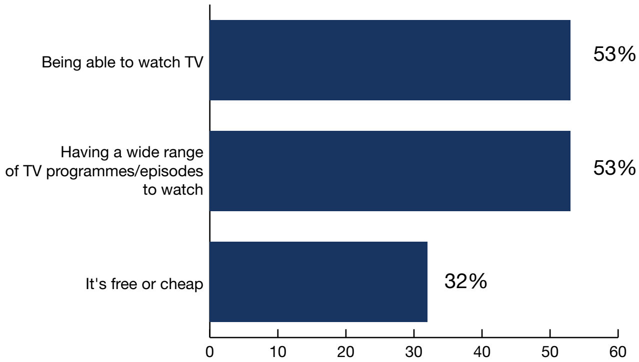
Music



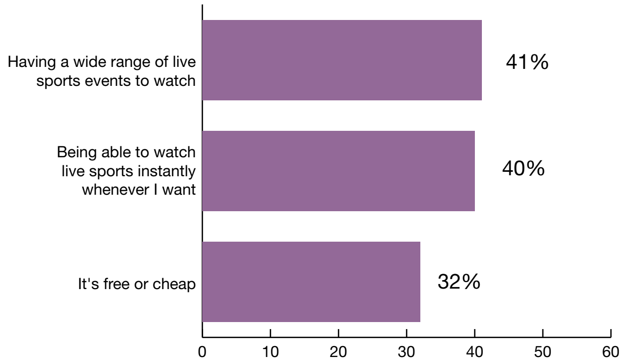
Films



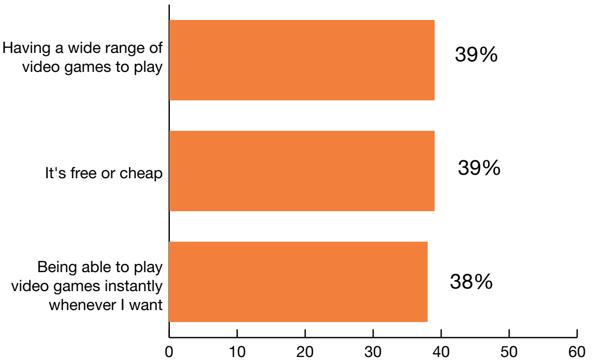
TV programmes/series



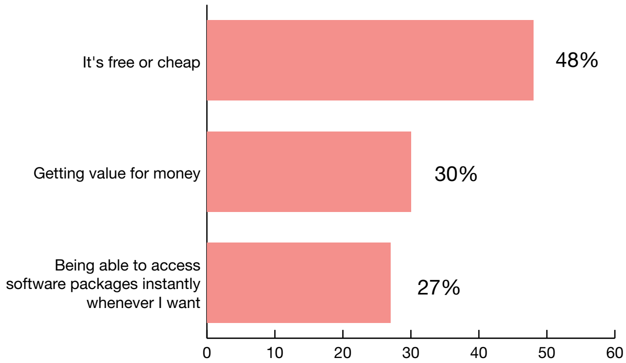
Live Sport



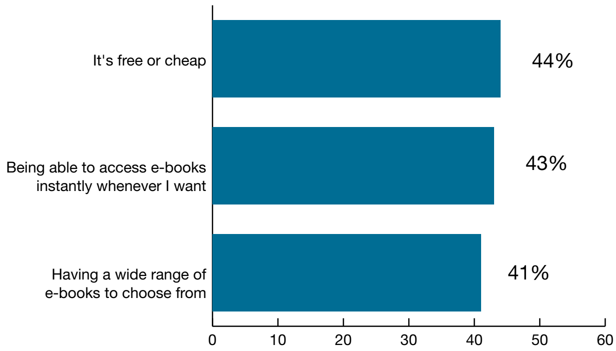
Video games



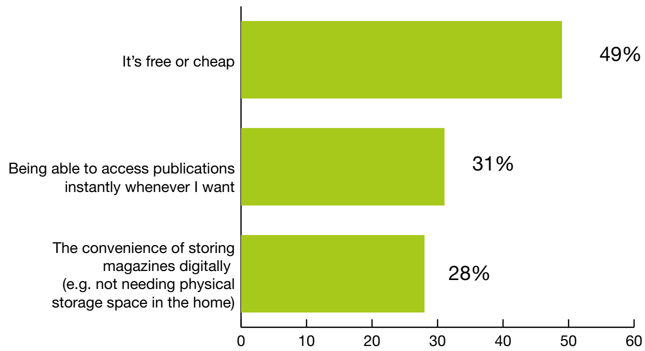
Software



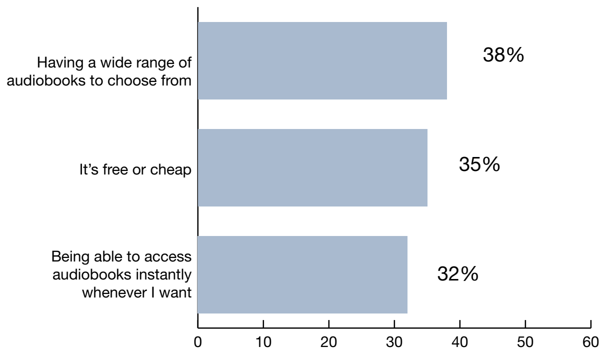
E-books



Digital Magazines



Audiobooks



Base: those who downloaded, streamed or accessed content in each category (music = 2,182, films = 2,286, TV programmes/series = 2,280, live sport = 392, video games = 1,017, software = 1,040, e-books = 1,097, digital magazines = 414, audiobooks = 515)

Infringement trends

As highlighted in the methodology section, in 2019 there were changes made as to how the infringement figures are determined, which should be kept in mind when making comparisons between waves before 2019 and 2019 or later.

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

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

Overall infringement

Infringement figures are based on the number of people who had used at least one illegal source over the past 3 months.

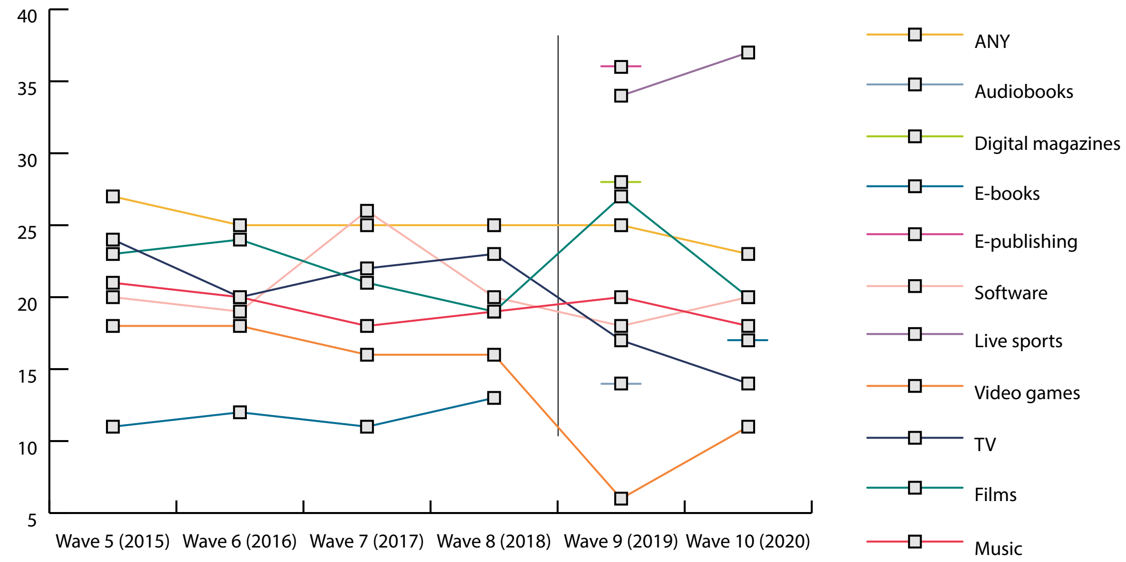
The overall level of respondents who had infringed across any category (excluding digital visual images[1]), which had been at 25% for the previous four waves, decreased by 2% to 23%.

While infringement levels for some categories remained stable, others did fluctuate either up or down:

- **Video games** saw a 5% increase (to 11%) in the proportion who had used an illegal source. While higher than last year this is still below the preceding waves of the research. It is also important to note that the increase could partly be owing to two new options for illegal activity being included this year ("Downloading mod versions of mobile games for free" and "Paying a small fee to access one or many games through a shared/ unknown account").
- **Live sport** saw a 3% increase (to 37%) which was the highest level of infringement out of any category.
- **E-books**, at 17%, was 4% higher than when it was last included as a category two years ago. Two new categories, **digital magazines** and **audiobooks**, both also related to e-publishing, were at 28% and 14% respectively. Infringement for each of these individual categories is considerably lower than the broader **e-publishing** category that was asked about last year (which stood at 35%).
- **Software** saw a small increase in infringement which took it from 18% to 20%. This is in line with many of the previous waves of research and is the third time it has been at 20% in the past six years.
- There was a 7% decrease in the proportion who had used an illegal source to watch **films** (20%). This lower amount was broadly in line with waves 5-8 where it was between 19-24%.
- At 14% the level of infringement in **TV** was 3% lower than last year and 9% lower than the year before that. It is also at the lowest point it has been over the past six years of the research.
- Infringement in **music** decreased by 2%, to 18%, which is broadly consistent with the levels it has reached over the past 5 years.

1 This was not included in the overall infringement figure as respondents were not asked about how they go on to use the images they access, and whether this is mainly for personal or public use (e.g. sharing on social media, including within presentations etc). As such, we cannot be sure of the full extent of copyright infringement.

Those who have used an illegal source at least once in the last 3 months (% of consumers in each category)



	Wave 5 (2015)	Wave 6 (2016)	Wave 7 (2017)	Wave 8 (2018)	Wave 9 (2019)	Wave 10 (2020)
Music	24%	20%	18%	19%	20%	18%
Films	23%	24%	21%	19%	27%	20%
TV	21%	20%	22%	23%	6%	14%
Video games	18%	18%	16%	16%	34%	11%
Live sports					34%	37%
Software	20%	19%	26%	20%	18%	20%
E-publishing					35%	
E-books	11%	12%	11%	13%		17%
Digital magazines						28%
Audiobooks						14%
ANY	27%	25%	25%	25%	25%	23%

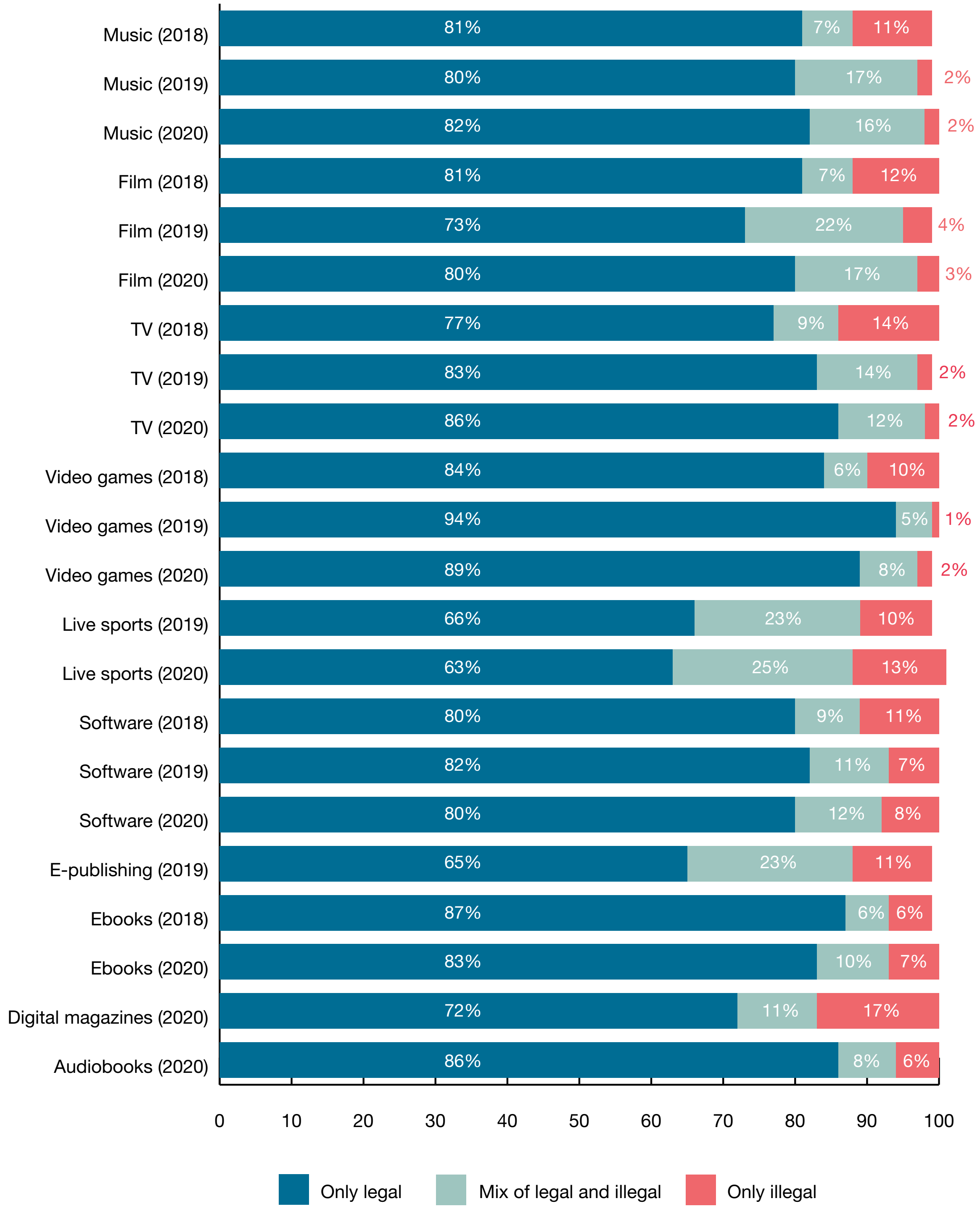
Base for 2020: those who used an illegal source at least once in that category during the past 3 months with “Download/access for free from the internet, without really being sure where it comes from” not counting as either legal or illegal and those who only selected this option not included in the base (music = 2,126, films = 2.253, TV programmes/series = 2,239, live sport = 363, video games = 941, software = 887, e-books = 1,031, digital magazines = 353, audiobooks = 478). Break in the series between 2018 and 2019 represents change in methodology.

Types of infringement

In comparison to the overall infringement levels, a more nuanced view can be gained by looking at the combination of legal and illegal sources used. Last year we saw a large reduction, across most categories, in the proportion using only illegal sources. It is encouraging to note that this year, in several categories, notably **music**, **TV** and **software**, we saw the same split (i.e. results were similar to 2019) between those using only illegal sources and those using at least some legal sources (i.e. being categorised as using a "Mix of legal and illegal sources"). There were several additional trends evident in other categories:

- For **film** the 7% decrease in overall infringement was mostly fuelled by a reduction in those using a mix of legal and illegal sources (which went from 22% to 17%). The proportion in those using only illegal methods remained small but consistent with 2019.
- In **live sport** and **video games**, both categories saw an overall growth in the level of infringement. These increases were fairly evenly split between those using only illegal sources and those using a mix of legal and illegal.
- The overall growth (4%) in infringement in **e-books** was largely owing to an increase in those using a mix of legal and illegal sources.
- The two new categories, **digital magazines** and **audiobooks**, were very different. Audiobooks had a similar split to e-books in terms of those using only illegal sources and those using a mix of legal and illegal. In comparison, digital magazines had, at 17%, the highest proportion out of any category of those using only illegal sources.

Those who have used an illegal source at least once in the past 3 months (% of consumers in each category)



Base for 2020: those who have used an illegal source at least once in that category during the past 3 months with "Download/access for free from the internet, without really being sure where it comes from" not counting as either legal or illegal and those who only selected this option not included in the base (music = 2,126, films = 2.253, TV programmes/series = 2,239, live sport = 363, video games = 941, software = 887, e-books = 1,031, digital magazines = 353, audiobooks = 478)

The difference between downloading and streaming

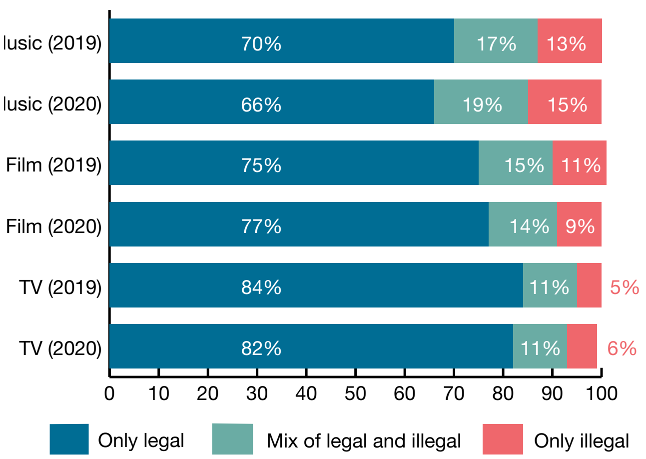
For **music, film and TV**, we are also able to look at infringement levels for downloading and streaming separately. Across all three categories there were higher levels of infringement for downloading when compared to streaming:

- **Music** continued to see considerably lower levels of infringement for streaming compared to downloading. Only 2% had used any illegal source to stream music while for downloading it was 34% (the highest of these three categories). Overall infringement in downloading grew by 4% from last year - this was evenly split between those who used only legal sources (+2%) and those using a mix of legal and illegal ones (+2%).

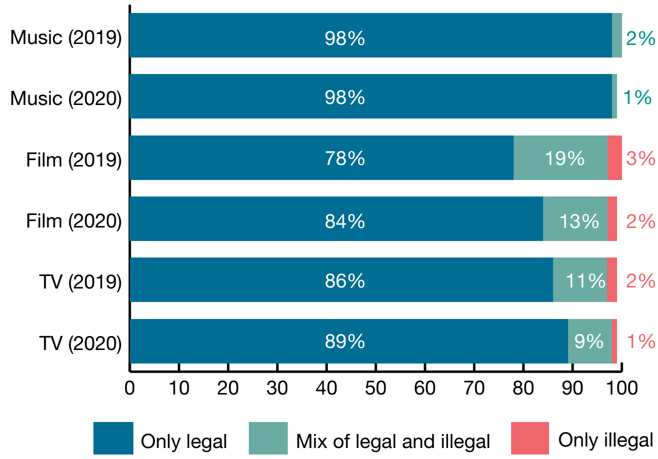
- **Film** also had higher levels of infringement for downloading (23%) compared to streaming (16%), but was much less pronounced than for music. The split between those using legal and illegal sources remained stable for downloading but had decreased for streaming. This decrease was most evident in those using a mix of legal and illegal sources, which fell by 4% to 13%.

- Consumers of **TV** programmes/series continued the trend evident in music and film. Overall infringement was higher in downloading (18%) than in streaming (11%) and in both cases was lower than it was for film. There were marginal overall differences compared to last year in both categories, with a 2% increase in those using illegal sources to download and a 2% decrease in those using illegal sources to stream.

Downloading



Streaming



Base: those who have used an illegal source at least once in that category during the past 3 months with "Download/access for free from the internet, without really being sure where it comes from" not counting as either legal or illegal and those who only selected this option not included in the base (music downloading = 1,102, film downloading = 885, TV downloading = 734, music streaming = 1,854, film streaming = 2,087, TV streaming = 2,074)

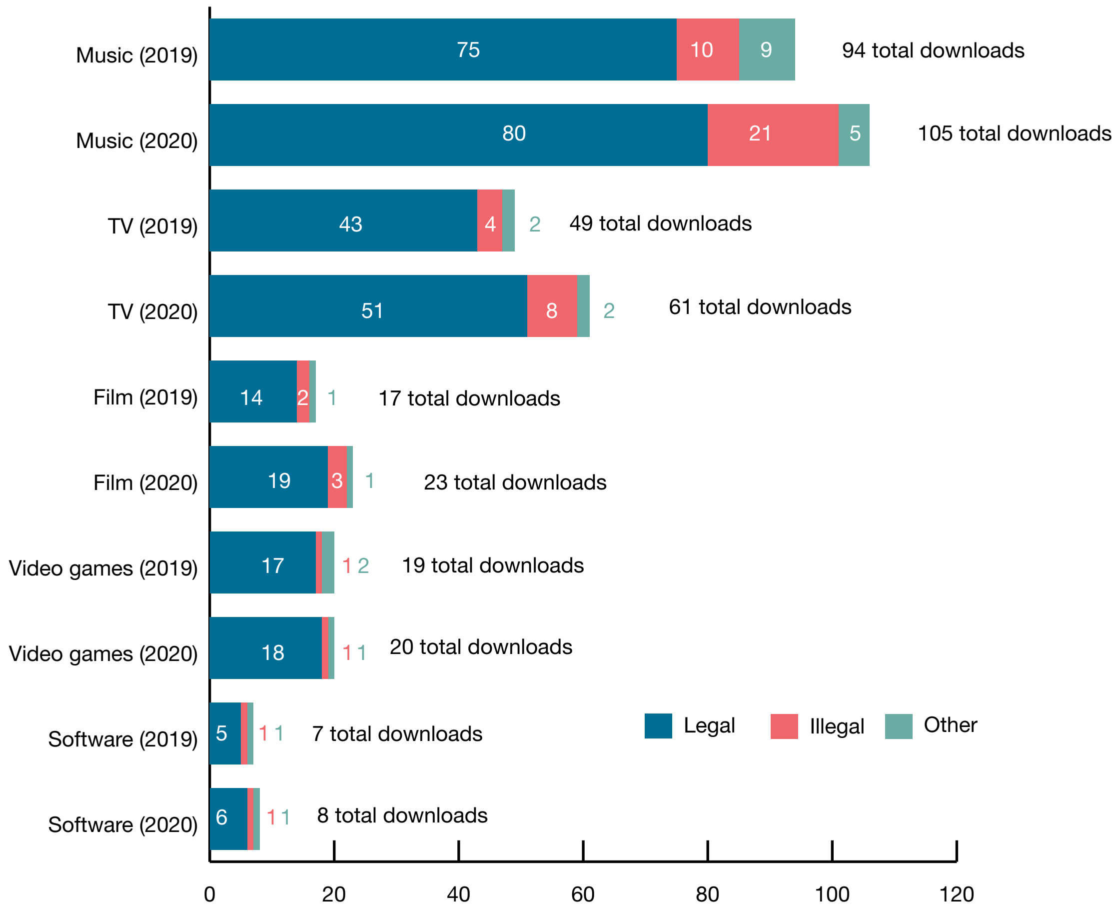
The amount of content consumed

As well as looking at the proportion who consume content through legal and illegal sources, we are also able to look at the amount of content they consume. For downloading this is ascertained in terms of the number of downloads made (e.g. tracks for music, episodes/programmes for TV) and for streaming, it is the number of hours spent streaming.

All categories either increased or remained at the same level in terms of the number of **downloads** compared to last year:

- **Music** had an average of 105 tracks downloaded in the previous three months this wave, which was an increase of 11 compared to the previous year. The number of legal downloads increased by 5 while the number of illegal downloads more than doubled, from 10 to 21.
- **TV** had an average of 61 episodes/programmes downloaded this wave, which was an increase of 12 from the previous year. The number of legal downloads increased by 8 while illegal downloads grew from 4 to 8.
- **Films** had an average of 23 downloads this wave, compared to 17 the previous year. The number of legal downloads increased by 5 to 19, with the number of illegal downloads staying at broadly the same level as last year (increasing from 2 to 3).
- **Video games** had an average of 20 downloads this wave and **software** had 8. Both remained consistent in terms of the number of legal and illegal downloads with the previous year.

Average number of downloads using legal and illegal sources over a three-month period (consumers in each category)

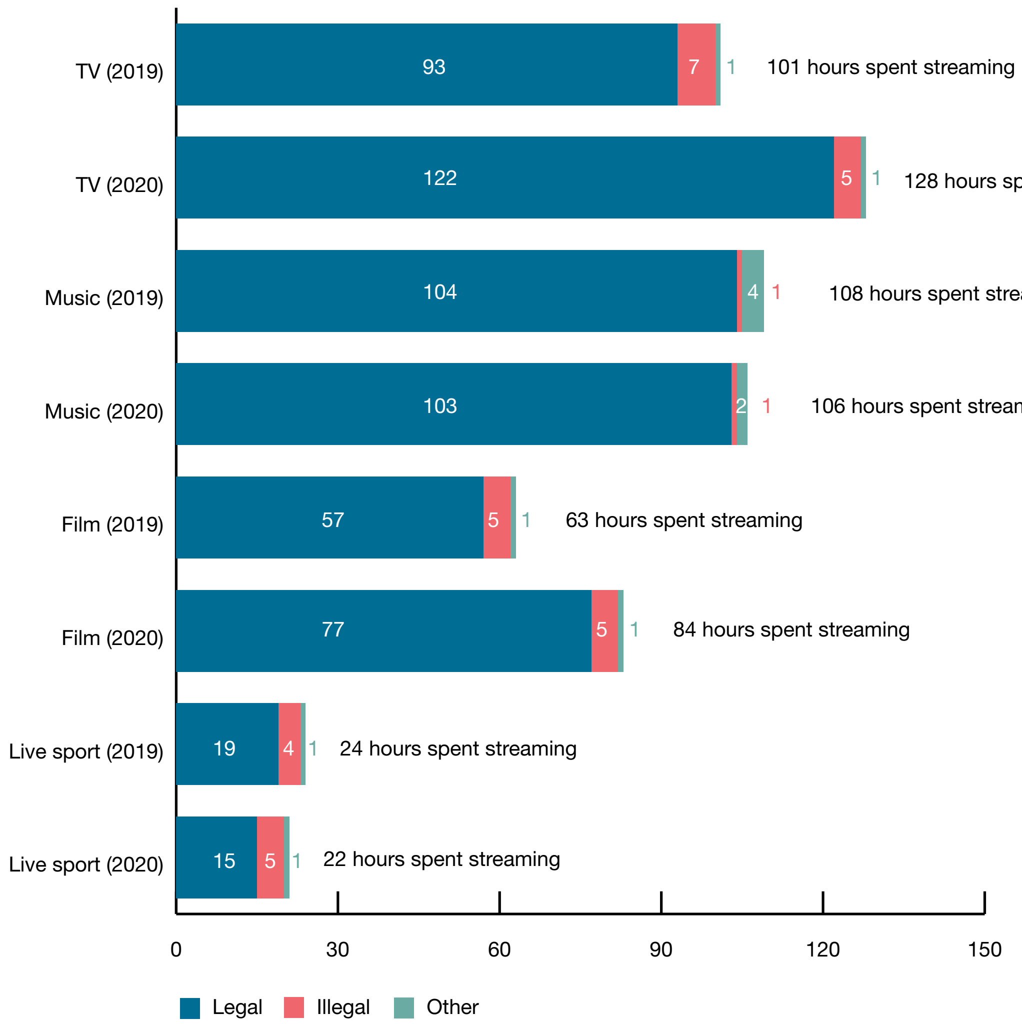


Base for 2020: music = 1,161, TV = 773, film = 923, video games = 1,001, software = 1,030

TV and **film** experienced large growth in terms of the number of hours spent **streaming** while **music** and **live sport** remained broadly at the same levels as last year:

- The average number of hours spent streaming **TV** over the previous three months, compared with last year, increased by 27 hours to 128 hours. This appears entirely owing to legal activity, with the number of hours spent streaming via illegal sources falling slightly from 7 to 5.
- Compared to last year, **film** also saw a growth in the average number of hours spent streaming over the previous three months, rising by 20 to 77. Again, this was fuelled by growth in legal activity with the number of hours spent using illegal sources remaining static at 5.
- Both **music** (106 hours) and **live sport** (22 hours) saw small 2 hour declines respectively in the average amount of time spent streaming over the previous three months. Both were similar to last year in terms of the amount of time spent using legal and illegal sources.

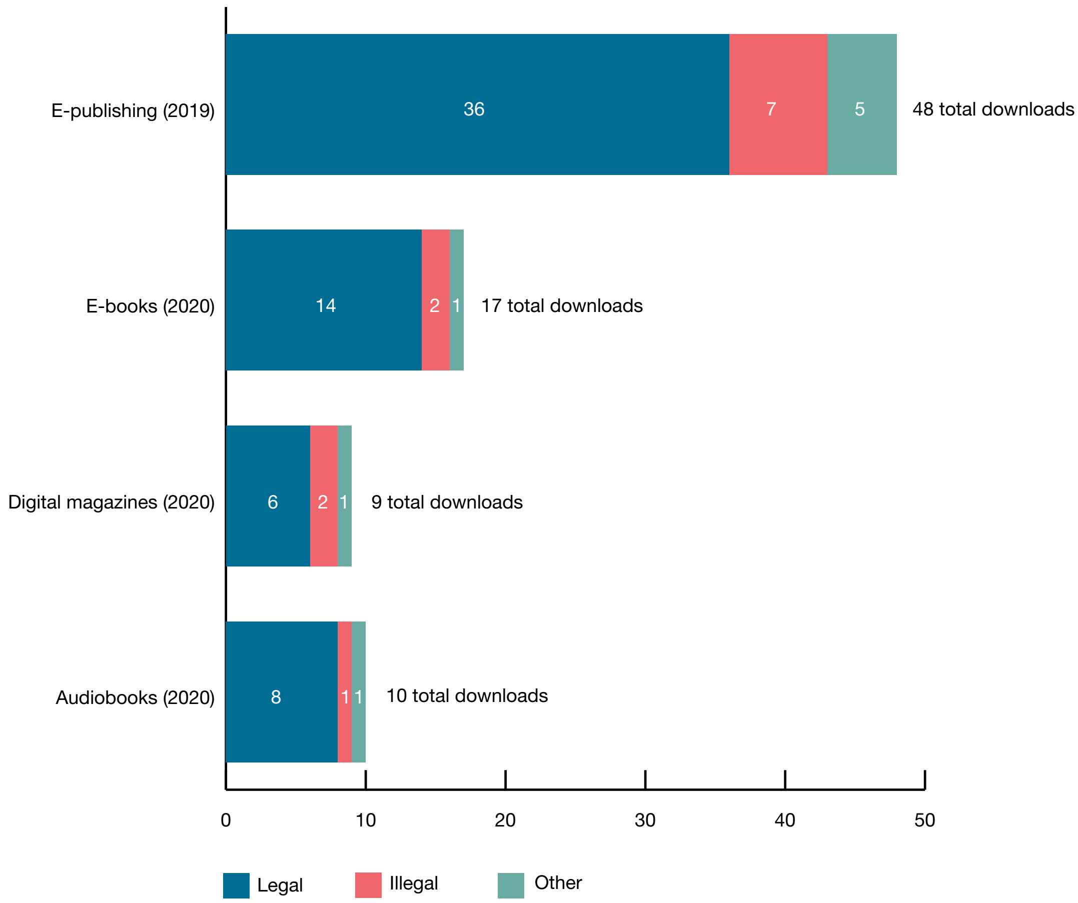
Average number of hours spent streaming using legal and illegal sources over a three-month period (consumers in each category)



Base for 2020: TV = 2,089, music = 1,851, film = 2,076, live sport = 321

E-publishing was not included as a category this year and so it is not possible to make a like-for-like comparison. In the categories that replaced it there was an average of 17 downloads in **e-books** over the previous three months and an average of 9 downloads in both **digital magazines** and **audiobooks**.

Average number of downloads in e-publishing using legal and illegal sources over a three-month period (consumers in each category)



Base for 2020: music = e-books = 1085, digital magazines = 406, audiobooks = 511

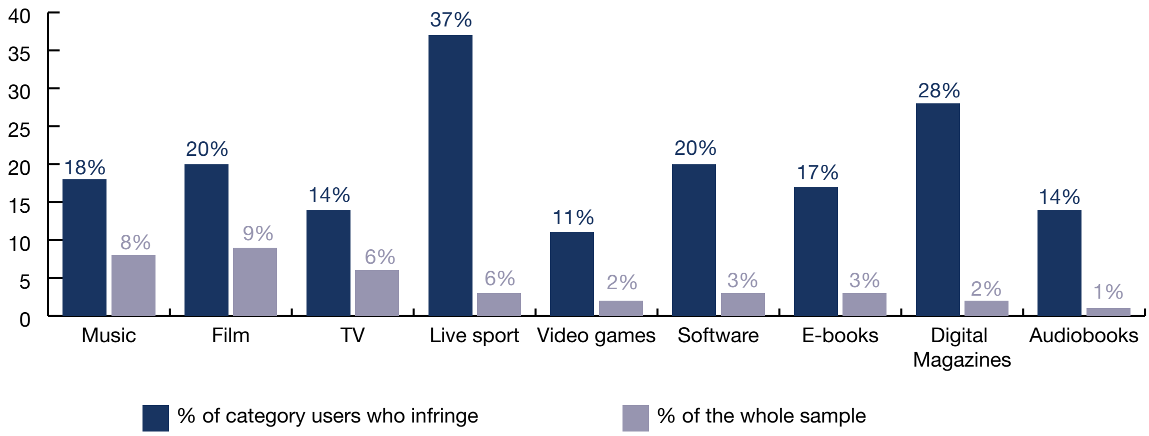
Infringer profiles

Here we provide more insight into the profiles of infringers by looking at key characteristics, including demographics, behaviours and attitudes. We also estimate the size of this group within the UK population.

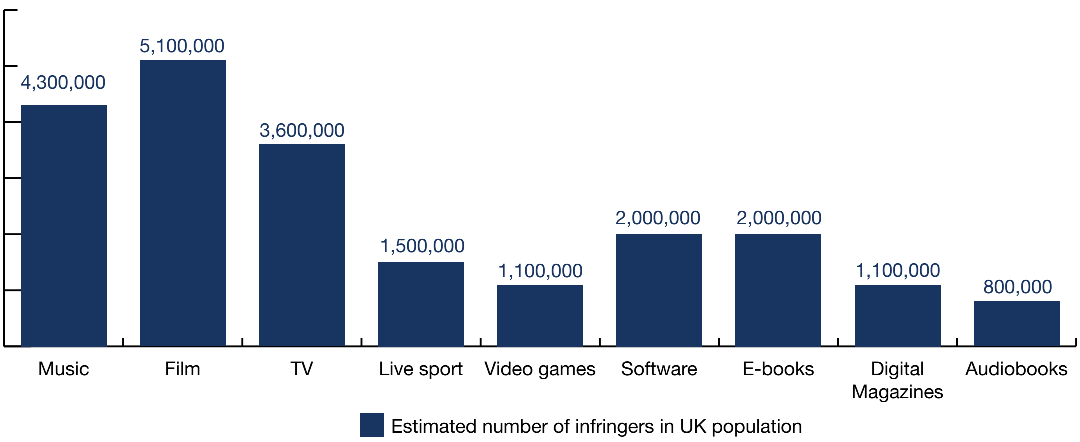
Base sizes for infringers (in each content category) are inclusive of anyone who has used an illegal source within the last 3 months.

- Live sport (37%) and digital magazines (28%) had the highest rates of infringement among those who consume each type of content.
- Film (20%), music (18%) and TV (14%) had lower levels of infringement but more infringers overall. For example, for film this was 9% of our total sample, which equates to approximately 5,100,000 people in the UK.

Infringement in each category and whole sample (%)

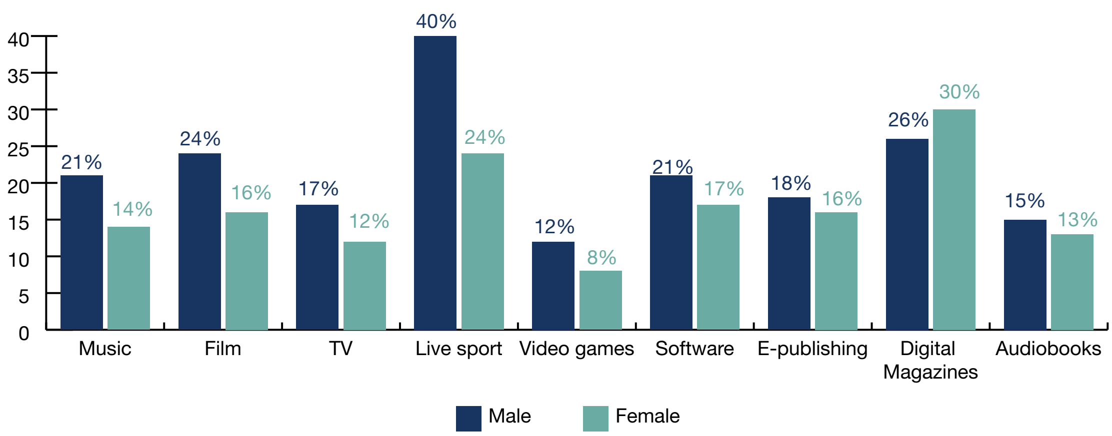


Estimated number of infringers for each category in UK population



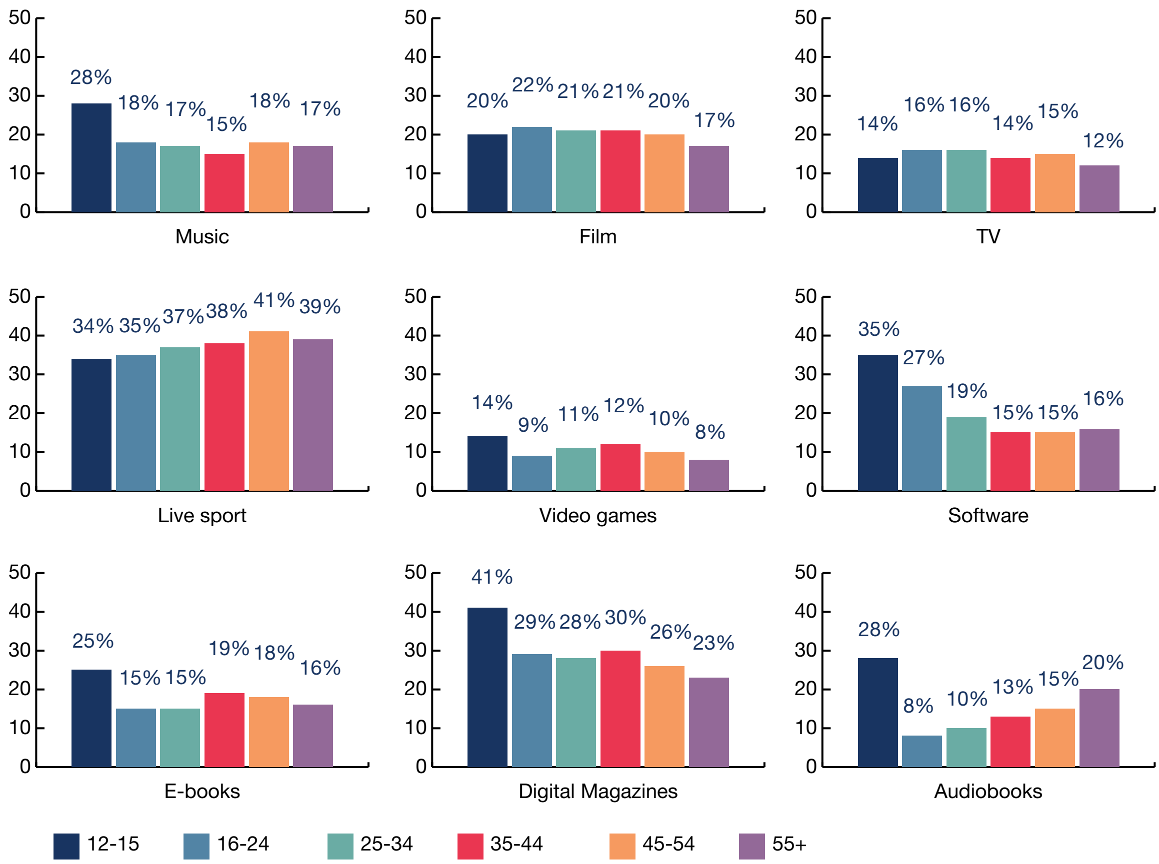
- For most categories, **men were more likely to infringe than women.** The infringement gap was largest for live sport (+16%), film (+8%), and music (+7%%).
- **Women** were more likely to access digital magazine content illegally (+4%).

Infringement in each category by gender (%)



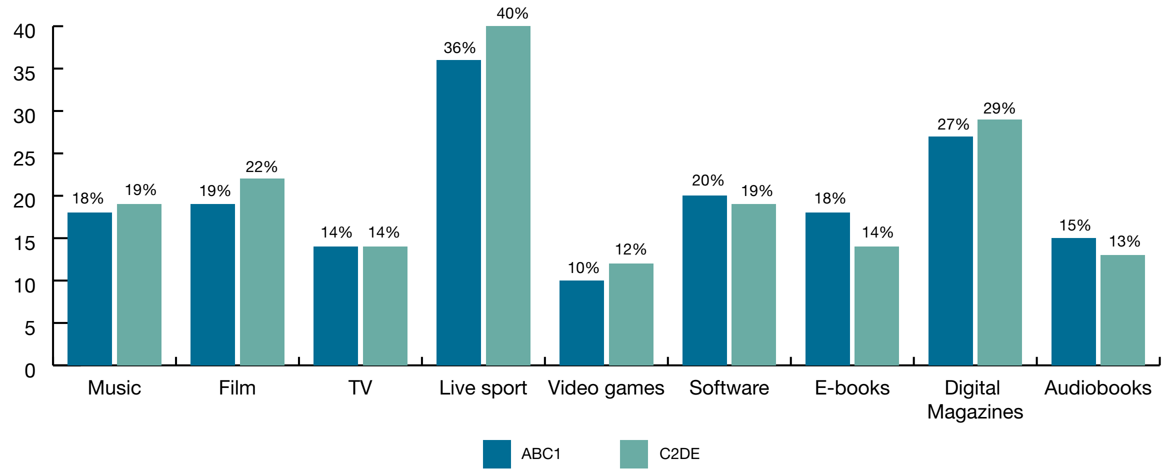
- When looking at age, film and TV had a relatively **even spread of infringement** with a slight drop off among those aged 55 and older.
- The youngest respondents, aged 12-15, were the **most likely to infringe in a number of categories**. These included music, video games, software, e-books, digital magazines, and audiobooks.
- Live sport was unique in that **older respondents were more likely to infringe;** 45-54 (41%) and 55+ (39%) were the two age groups with the highest rates of infringement. With audiobooks, there was a drop off in infringement after the 12-15 age group and, from there, the **rate of infringement rose steadily with age**.

Infringement in each category by age (%)



- There was an even spread of infringement levels across social grades for most categories. Live sport (+4% C2DE) and e-books (+4% ABC1) had the largest differences in infringement levels.

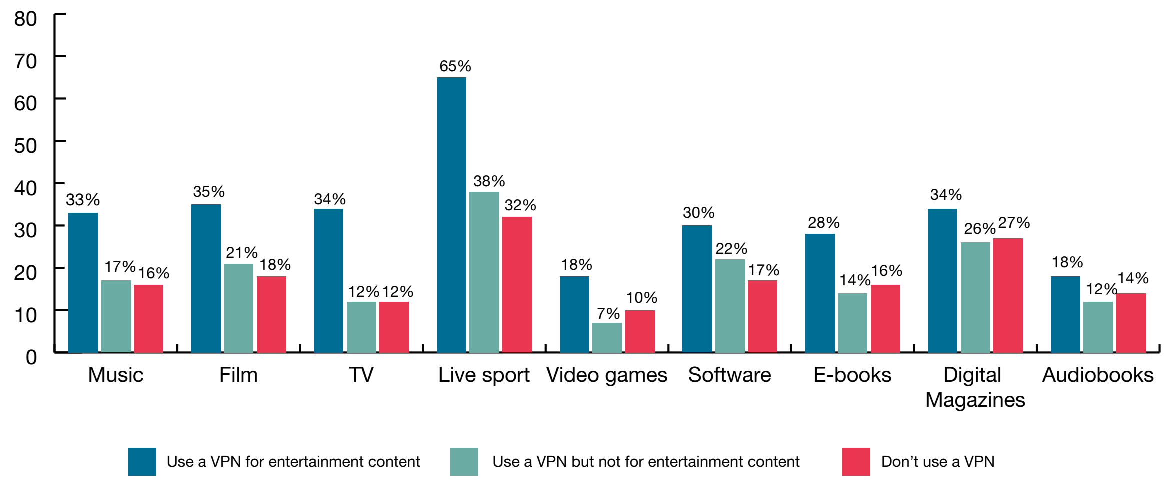
Infringement in each category by social grade (%)



- Across all categories, respondents who used a VPN specifically for entertainment content were more likely to have infringed compared to those who used a VPN for activity other than entertainment and those who did not use a VPN at all. Live sport, TV, music and film had particularly large differences between those who used a VPN for entertainment content and those who did not.

- For most categories, levels of infringement were similar for those who used a VPN (but not for entertainment content) and those who did not use a VPN at all.

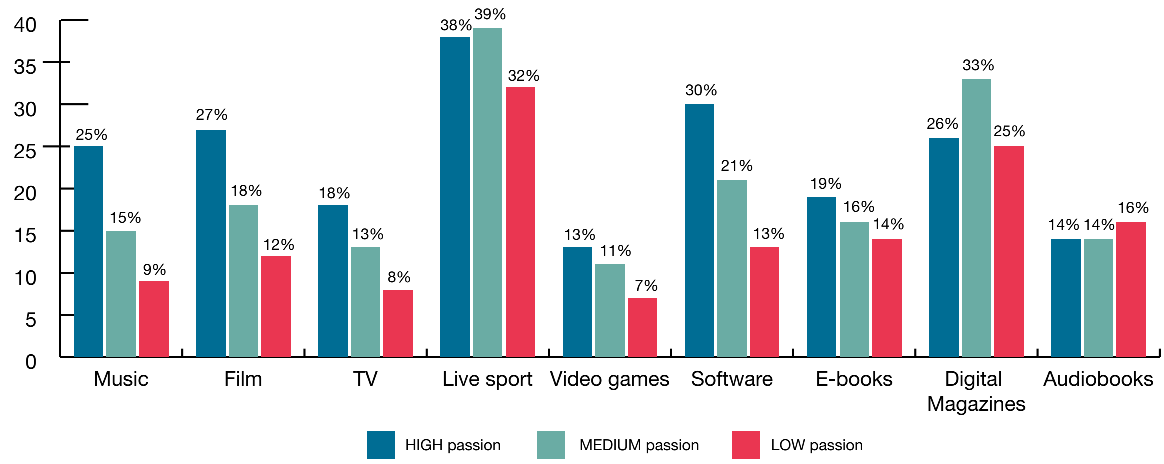
Infringement in each category by use of VPN (%)



- Across several categories there was a pattern of those with the **highest passion[2] being most likely to infringe**, which subsequently declined in those with medium and low levels. This was most evident in software where the infringement levels decreased by 17% from high to low passion levels. Similarly, both music (-16%) and film (-15%) had substantial differences between those with high passion and those with low passion.

2 Passion levels were derived by scoring answers to a range of statements. The full list of statements can be found in the category sections of the report. They were scored on the basis of strongly agree=1, agree a little=2, disagree a little=3; strongly disagree=4. "High" was a score of 6-12, "Medium" 13-17 and "Low" was 18 or more.

Infringement in each category by level of passion for category (%)

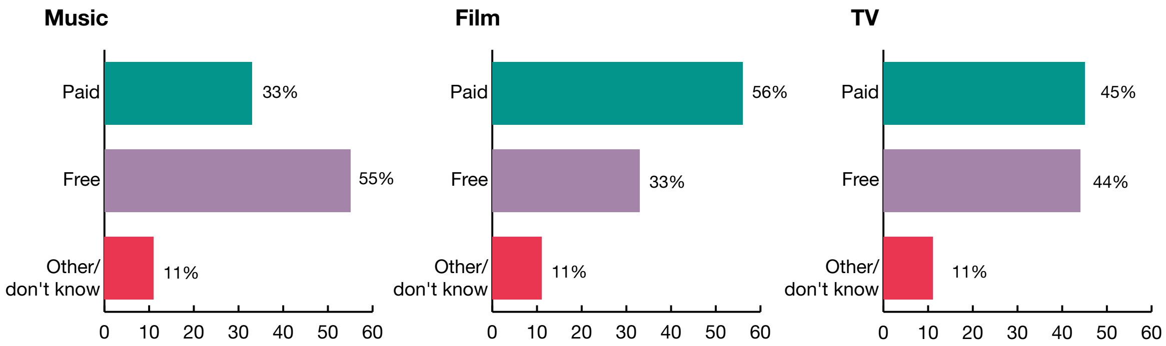


Base for all tables: those who have used an illegal source at least once in that category during the past 3 months with "Download/access for free from the internet, without really being sure where it comes from" not counting as either legal or illegal and those who only selected this option not included in the base (music = 2,126, films = 2,253, TV programmes/series = 2,239, live sport = 363, video games = 941, software = 887, e-books = 1,031, digital magazines = 353, audiobooks = 478)

Reducing infringement

Respondents who had used illegal sources at least once in the previous 3 months were asked what they would do if these sources were no longer available to them. They were presented with a list of individual (paid and free) legal options and asked to select the one they would be most likely to use.

- Paid sources were most commonly selected for **films (56%)**. This was closely followed by **live sport, video games** and **digital magazines** (all at 53%).
- Respondents were more likely to select paid options for **film** (56%) compared to TV (44%).
- While **music** had the lowest proportion saying they would migrate to a paid source, still as much as a third (34%) potentially would. The most common free music source used was "a site such as YouTube or Daily Motion to watch/listen to music" (33%).



Top paid alternative:

15%
would "Pay for a subscription to, or use a paid-for premium tier of, a music streaming service (e.g. Spotify, Apple Music)"

37%
would "Pay for a subscription to, or use a paid-for premium tier of, a video streaming service (e.g. Netflix, Amazon Prime Video)"

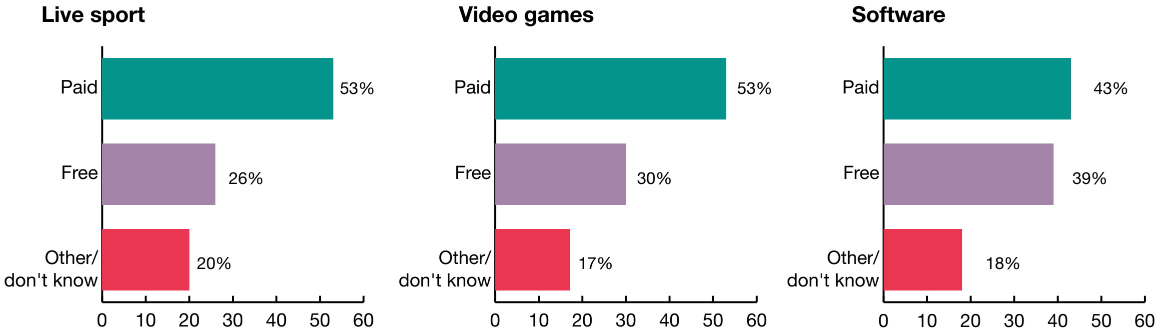
30%
would use "A paid subscription to an online video streaming service (Netflix, Amazon Prime Video, NowTV etc.)

Top free alternative:

25%
would use "A site such as YouTube or Daily Motion to watch/listen to music"

17%
would "Watch for free via a site such as YouTube or Daily Motion"

26%
would use "TV Catch-up services (BBC iPlayer, 4OD, Sky etc.)"



Top paid alternative:

31%
would use "A paid subscription to a sports platform that can be accessed online (Sky-go, BT Sport, Sky Sports, NOWTV, Amazon Prime etc.)"

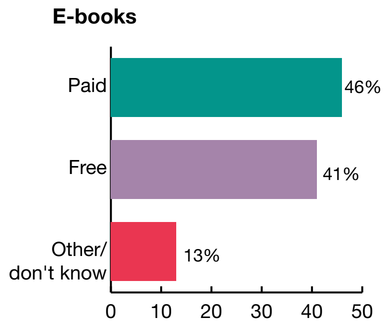
16%
would use "Free scheduled broadcasts by an official source (e.g. the NBA, NFL, FA etc.) on social media sites such as Facebook, Twitter, Instagram, Twitch, Periscope or Snapchat, or via sites such as YouTube, Vevo or Vimeo"

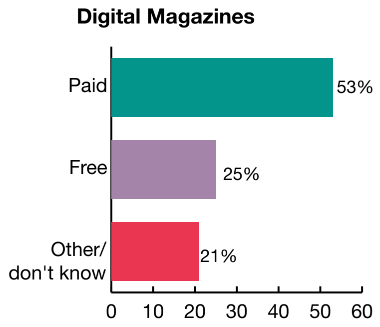
25%
would pay "a single fee to download individual video games through services such as the Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc."

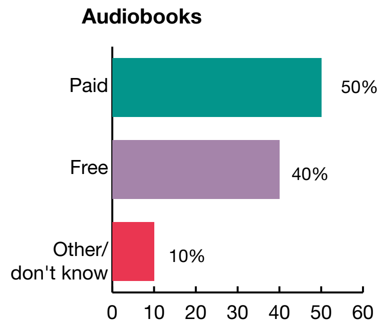
30%
would download "video games for free through Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc."

33%
would pay "a single fee for an individual software package through a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook"

39%
would use "For free via a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook"







Top paid alternative:

23%
would "Buy physical copies of books through stores"

29%
would "Buy physical copies of magazines through stores"

23%
would "Buy physical copies of audiobooks through stores"

Top free alternative:

16%
would access "Content made available online by a library (e.g. at school, my local library etc.)"

20%
would "Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online"

21%
would access "Content made available for free by publishers on their own social media or website (e.g. promotional chapters)"

Base for all tables: those who have used an illegal source at least once in that category during the past 3 months with "Download/access for free from the internet, without really being sure where it comes from" not counting as either legal or illegal and those who only selected this option not included in the base (music = 387, films = 453, TV programmes/series = 316, live sport = 136, video games = 99, software = 174, e-books = 173, digital magazines = 99, audiobooks = 68)

Background

The IPO has been tracking consumer behaviour (among the 12+ population in the UK) in relation to online copyright infringement, since 2012. Now in its tenth wave of survey data, the Online Copyright Infringement (OCI) tracker has established itself as the most robust and insightful study in this space, globally. Australia, Canada and Germany have sought to replicate the study and the IPO is hopeful that other countries will follow.

The study itself focuses on **specific content categories**, looking at infringement behaviours as well as other topics that help to contextualise and explain them. Given the rapid nature of technological advancements, the study is conducted annually to ensure that the IPO is able to monitor the impact of new online platforms on infringement behaviours.

Findings from the IPO's OCI study are **widely disseminated** and help to inform high-level decision-making. This includes monitoring infringement behaviours, tracking the effectiveness of educational campaigns looking to mitigate such behaviours, facilitating evidence-based policy making and liaising with stakeholders within the relevant content industries.

In 2019, the IPO commissioned AudienceNet to conduct the OCI study for the first time. The IPO wanted AudienceNet to replicate key elements of the methodology, to enable comparability with previous waves of data, while also adding value to the study.

Methodology

Prior to the ninth wave, the research was purely quantitative with 4,500 online and 500 face-to-face interviews. Since the ninth wave, AudienceNet has employed a two-staged, mixed methodology, approach. The process was designed to replicate robust measurement while also offering additional depth of insight.

Stage 1: Online Survey

Online data collection, with fieldwork taking place between 05/05/20 and 10/06/20

15-minute survey

N=5,000

Nat Rep of UK +12 population

Stage 2: Ongoing Qualitative Engagement

Online Community, with fieldwork taking place between 06/06/20 and 12/06/20

Mixture of research tasks, experimental conditions and discussion topics

5 days

N=50

Infringers aged 16+

Stage 1 – Online Survey

The **tenth wave** used the same streamlined questionnaire that had been the basis for the previous wave. The main change compared to waves preceding the ninth wave was that a **less direct** approach was taken to finding out whether illegal sources are used, in order to encourage more honesty. More specifically, rather than asking this outright, respondents were shown a list of options and the classification of legal or illegal was done based on the options chosen.

Some additional changes were made to the questionnaire this year as a result of the COVID-19 pandemic. This included asking, for each content category, if their content consumption had changed and, if so, what it had been like prior to the coronavirus outbreak. There were also some additional questions, unrelated to the pandemic, in each category on the amount that is paid for content and the reasons for using illegal sources more or less than the previous year.

Quotas were set to ensure that the survey sample (N=5,000) was **representative of the UK 12+ population** in terms of age, gender and region. All respondents had internet access (i.e. the offline population was not included). The survey sample was sourced through AudienceNet's network of professionally managed, ESOMAR compliant, online UK consumer research panels. While this is a cost-effective approach, one limitation is that it comprises people who have opted in to take part in research.

The survey took, on average, 11 minutes for respondents to complete. There was a dropout rate of 7%.

This year, **8 content categories were included** in the research: music, film, TV programmes/series, live sports, video games, software, e-publishing (split into e-books, digital magazines and audiobooks) and digital visual images.

The **level of detail captured** varies for some of the content categories:

- For music, film, TV programmes/series, respondents were asked about downloading and streaming separately.
- For all other categories, respondents were asked about streaming/accessing and downloading together, where relevant.
- For digital visual images, respondents were only asked about infringement behaviours and a supplementary question on what they did with the images they downloaded/accessed.

This year's wave (2020) saw changes for some categories that impact comparability with previous data. Notably, in the ninth wave the e-book category was broadened out to include all e-publications. In this wave it was split out into three separate categories (e-books, digital magazines and audiobooks) with the 'passion' question still asked at an overall level for these three categories.

Stage 2 – Ongoing Qualitative Engagement

The primary aim of the Online Community was to investigate, in more depth, the **drivers and barriers to accessing online content via illegal sources;** particularly exploring whether there were any additional drivers brought on by the extraordinary circumstances of this year (i.e. the COVID-19 pandemic). It also sought to **test and co-create communications materials** to inform potential communications to be used by the IPO to facilitate positive behaviour change.

Upon analysis of the data from the Online Survey, AudienceNet identified **key population segments** to focus on in the qualitative stage. N=50 representatives of these groups were then recruited into a 5-day Online Community. These respondents accessed content via illegal sources, although some were heavier users while others used a more even mix of legal and illegal sources.

The Online Community took place from the **8th-12th of June 2020**. It is pertinent to note the timing of this community was approximately 3 months after lockdown started, when public measures to reduce the impact of COVID-19 were still very restrictive and before any major easing of these measures.

For reasons of qualitative validity (i.e. convergence of insights), **five** of the content categories were focussed on **in-depth within the Community.** E-publishing was split into two categories - those who focussed on e-books and those who focussed on digital magazines, in order to capture nuances between attitudes and behaviours in this category. Audiobooks was not included due to the low levels of both consumers and infringers in this category meaning that recruitment of a robust sample was not viable. As opposed to the last wave (2019) when TV and Film had been a combined category, these were split out in order to reflect the differences in consumption habits in each identified previously.

There were **no respondents recruited specifically for live sports** this year as it was deemed that there would not be enough content for respondents to meaningfully report on. Instead, a few general questions about live sports were asked of all respondents, in order to gauge to what extent the severe decrease in content in this category had affected the overall pool of respondents.

Number of respondents (N=50):

- Music (N=8+)
- Film (N=8+)
- TV (N=8+)
- Video Games (N=8+)
- E-books (N=6+)
- Digital Magazines (N=6+)

To gain their trust and encourage honesty, those taking part in the Community were given further assurance that their responses would be anonymous and that no action would be taken against anyone indicating that they illegally access content. However, given the sensitive nature of discussions, only adults (i.e. 16+) were invited to take part.

Navigating the report

The report begins with a review and comparison of key trends across each content category. This is based on OCI 2020 data, with comparisons made with previous waves where relevant.

Each content category then has its own bespoke section, based on 2020 results. Qualitative insights are included for content categories covered within the Online Community.

The report ends with a summary of key findings that are relevant for future behaviour change campaigns. Results are largely based on the **communications testing and co-creation** activities conducted in the qualitative research.

Interpreting the data:

- Due to the changes in the way levels of infringement are captured, we advise caution when comparing 2019 and 2020 data with previous waves.
- Where (single choice) question **percentages** do not add up to 100%, this is due to **rounding of the data**.
- Where base sizes are **below N=30**, results must be interpreted with caution.
- **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, we advise caution when interpreting results that have less than a (-/+) 3/4 % difference.

OCI 2020 Context - Life during the COVID-19 pandemic

During the Online Community, respondents were asked to provide insight into their day to day lives since COVID-19 had struck and the lockdown had been imposed, in an effort to understand their situation and emotional needs around entertainment at this time. Around half of those included in this phase of the research were still working or studying while the other half had been furloughed or had experienced interruptions to their education.

Those who had been furloughed or could no longer study noted a marked shift in their daily lives and routines, mainly owing to the fact that they suddenly had lots of free time with no work to keep themselves occupied. This had a number of effects. Some were grateful for the change of pace with no choice but to stay inside and entertain themselves or work on personal projects. Others, however, found it difficult to keep themselves occupied within the confines of their household. This was especially challenging for those who were anxious about COVID-19 as they found they had even more time to worry or think about the dangers of catching the virus themselves or passing it on.

Those still working or studying felt less of a shift from normality, saying that life had not fundamentally changed beyond having to suddenly work from home and that they were still busy. Nonetheless, working from home came with its own set of stressful scenarios such as spending all of the day with other household members and, like everyone else, not being able to socialise outside of the home.

In addition, whether respondents had been furloughed or were still working, there was a distinct sense, at the time of this qualitative study, of lockdown fatigue. While some had started getting used to the strange new circumstances of lockdown - even appreciating the reported benefits to the environment during this time and finding ways to cope - months of not being able to see family and friends or lead a normal lifestyle outside was starting to make them feel weary and frustrated.

The result of these various experiences was that, on the one hand, the lockdown had offered opportunities for learning new skills, enjoying more free time, even giving introverted respondents a break from the social pressures they often felt. However, on the other hand, the lockdown also threw up many challenges at various points over the past couple of months, such as boredom, frustration, anxiety and stress.

Coping mechanisms and the role of entertainment

To help navigate the challenges brought about by COVID-19, respondents found various ways of coping, comforting themselves and combating boredom and anxiety. The majority were most thankful for technology such as Whatsapp and Zoom etc. which allowed them to stay in contact with their friends and loved ones. Many said they would have felt even more isolated and their mental health would have severely suffered without the ability to communicate with others.

"I have been proactive in keeping in touch with my friends and colleagues over the course of lockdown and I have even reached out to people I haven't spoken to for years just to have a bit of a conversation. I think we as human beings are obviously very social beings. For us it is very important to feel support. I would have felt utterly miserable without having the opportunity to be in touch with people."

MALE, 25-34

"I would miss talking to friends the most as it would mean that I felt cut off from everyone and alone, this would impact my mood massively as I would feel lonely and sad. I would have only been able to talk to people in my house which would have meant that there would be more fallings out - there's only so long you can take with each other."

FEMALE, 16-24

Many people also said they were spending more time being creative, or doing something with their hands, such as cooking, crafts, painting or even writing their own novel. Many found that this helped not only to occupy but to stimulate the mind and offer a sense of achievement.

"Origami has been very useful particularly in helping me and my son build and do something tactile."

MALE, 35-44

"Scrapbooking has really helped me make lockdown more enjoyable. It was a new hobby back in college and will be a continuous project but looking at all of these memories has really cheered me up."

FEMALE, 16-24

"I used to enjoy going out, seeing friends and family but not being able to do that has had a bit of an impact on my mental health. I have managed to find pottering in the garden and making things out of scrap wood useful in keeping me entertained."

MALE, 35-44

Coping mechanisms and the role of entertainment

When it came to entertainment, many said they had relied heavily on certain categories to fill their time and transport them away from the realities of lockdown. Each had their personal preferences and discussed the comfort and escapism of various forms of entertainment, whether it was an uplift in mood or simply concentrating on something other than the world around them.

Whichever the preferred format, entertainment was seen to have played a pivotal role during lockdown. Most commented that without entertainment their experience would have been far less tolerable and their mental wellbeing would have deteriorated without this form of distraction.

"If all entertainment sources had been removed during lockdown it would have been very frustrating, and our outlets for tension would have disappeared. My mood and mental health would probably have suffered as a result of this."

MALE, 35-44

"Generally speaking, the entertainment industry has played a vital role in maintaining my sanity and mental health during this lockdown and I couldn't even imagine not being able to access it. Music especially has been my source of joy and relaxation during this period and I think that is what I would miss the most."

FEMALE, 16-24

"I've been off work since the start of lockdown and without access to entertainment it would have been very difficult to switch off. I use entertainment as a way to relax after I am done with household chores and need something to occupy my mind, without which I believe I would have been in a very different mental state."

FEMALE, 25-34

OCI 2020 context - life during the COVID-19 pandemic

Qualitative summary

During the Online Community, respondents were asked to provide **insight into their day to day lives** since COVID-19 had struck and the lockdown had been imposed, in an effort to understand their situation and **emotional needs** around entertainment at this time. Around half of those included in this phase of the research were still working or studying while the other half had been furloughed or had experienced interruptions to their education.

Those who had been furloughed or could no longer study noted a **marked shift in their daily lives** and routines, mainly owing to the fact that they suddenly had lots of free time with no work to keep themselves occupied. This had a **number of effects**. Some were grateful for the **change of pace** with no choice but to stay inside and entertain themselves or work on personal projects. Others, however, found it **difficult to keep themselves occupied** within the confines of their household. This was especially challenging for those who were anxious about COVID-19 as they found they had even **more time to worry** or think about the dangers of catching the virus themselves or passing it on.

Those still working or studying felt **less of a shift from normality**, saying that life had not fundamentally changed beyond having to suddenly work from home and that they were still busy. Nonetheless, working from home came with its own set of **stressful scenarios** such as spending all of the day with other household members and, like everyone else, not being able to socialise outside of the home.

In addition, whether respondents had been furloughed or were still working, there was a distinct sense, at the time of this qualitative study, of **lockdown fatigue**. While some had started getting used to the strange new circumstances of lockdown - even appreciating the reported benefits to the environment during this time and finding ways to cope - months of not being able to see family and friends or lead a normal lifestyle outside was starting to make them feel **weary and frustrated**.

The result of these **various experiences** was that, on the one hand, the lockdown had **offered opportunities** for learning new skills, enjoying more free time, even giving introverted respondents a break from the social pressures they often felt. However, on the other hand, the lockdown also threw up **many challenges** at various points over the past couple of months, such as boredom, frustration, anxiety and stress.

Coping mechanisms and the role of entertainment

To help navigate the challenges brought about by COVID-19, respondents found **various ways of coping, comforting themselves and combating boredom and anxiety.** The majority were most thankful for technology such as Whatsapp and Zoom etc. which allowed them to **stay in contact with their friends and loved ones**. Many said they would have felt even more isolated and their mental health would have severely suffered without the ability to communicate with others.

- *"I have been proactive in keeping in touch with my friends and colleagues over the course of lockdown and I have even reached out to people I haven't spoken to for years just to have a bit of a conversation. I think we as human beings are obviously very social beings. For us it is very important to feel support. I would have felt utterly miserable without having the opportunity to be in touch with people."* - Male, 25-34

- *“I would miss talking to friends the most as it would mean that I felt cut off from everyone and alone, this would impact my mood massively as I would feel lonely and sad. I would have only been able to talk to people in my house which would have meant that there would be more fallings out - there’s only so long you can take with each other.”* - Female, 16-24

Many people also said they were spending more time **being creative, or doing something with their hands,** such as cooking, crafts, painting or even writing their own novel. Many found that this helped not only to occupy but to stimulate the mind and offer a sense of achievement.

- *“Origami has been very useful particularly in helping me and my son build something and do something tactile.”* - Male, 35-44
- *“Scrapbooking has really helped me make lockdown more enjoyable. It was a new hobby back in college and will be a continuous project but looking at all of these memories has really cheered me up.”* - Female, 16-24
- *“I used to enjoy going out, seeing friends and family but not being able to do that has had a bit of an impact on my mental health. I have managed to find pottering in the garden and making things out of scrap wood useful in keeping me entertained.”* - Male, 35-44

When it came to **entertainment**, many said they had relied heavily on certain categories to **fill their time and transport them away from the realities of lockdown**. Each had their personal preferences and discussed the comfort and escapism of various forms of entertainment, whether it was an uplift in mood or simply concentrating on something other than the world around them.

Whichever the preferred format, entertainment was seen to have played a **pivotal role** during lockdown. Most commented that without entertainment their experience would have been far less tolerable and their **mental wellbeing would have deteriorated** without this form of distraction.

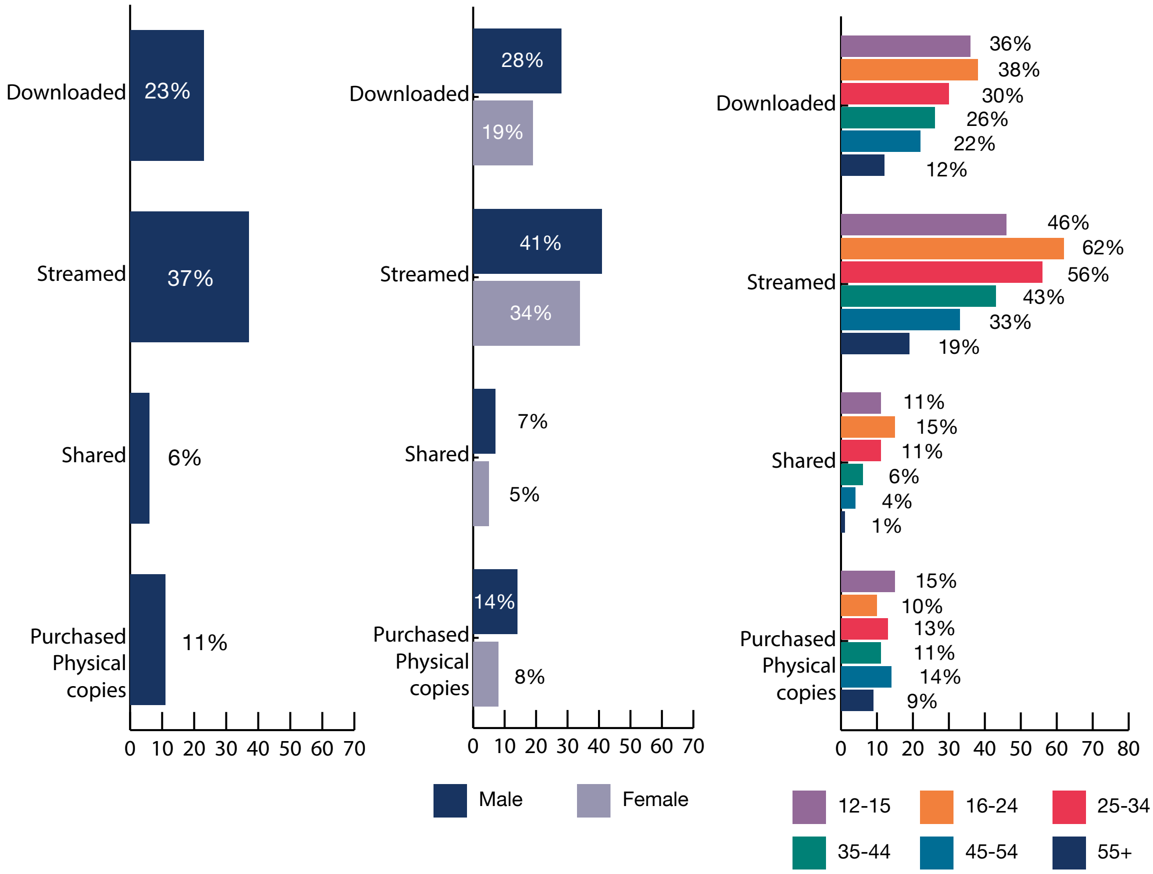
- *“If all entertainment sources had been removed during lockdown it would have been very frustrating, and our outlets for tension would have disappeared. My mood and mental health would probably have suffered as a result of this.”* - Male, 35-44
- *“Generally speaking, the entertainment industry has played a vital role in maintaining my sanity and mental health during this lockdown and I couldn’t even imagine not being able to access it. Music especially has been my source of joy and relaxation during this period and I think that is what I would miss the most.”* - Female, 16-24
- *“I’ve been off work since the start of lockdown and without access to entertainment it would have been very difficult to switch off. I use entertainment as a way to relax after I am done with household chores and need something to occupy my mind, without which I believe I would have been in a very different mental state.”* - Female, 25-34

Engaging with music

47% had engaged with music in the previous 3 months (i.e. either by downloading, streaming, sharing or purchasing physical products).

- **Streaming was the most common** method of accessing music, with 37% having done so. Downloading followed at 23%, with notably fewer having purchased physical music (11%).
- Across streaming and downloading,16-24-year olds were the most engaged when compared to both younger and older age groups.

A1. Have you downloaded/streamed/shared[3]/purchased physical copies of music in the past 3 months?



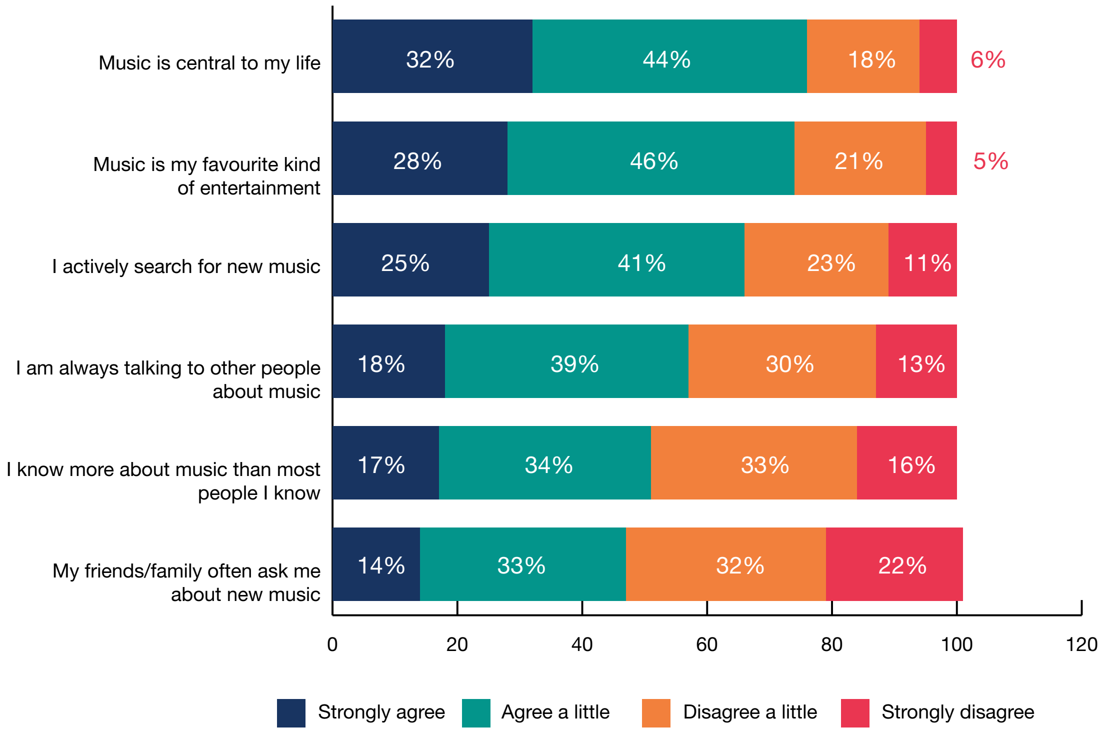
Base: n=5,004 (total sample)

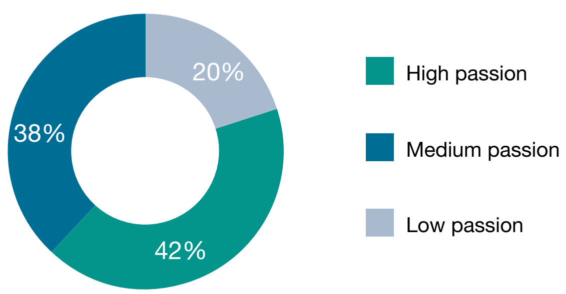
3 The definition of 'shared' was provided as: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in the answer option."*

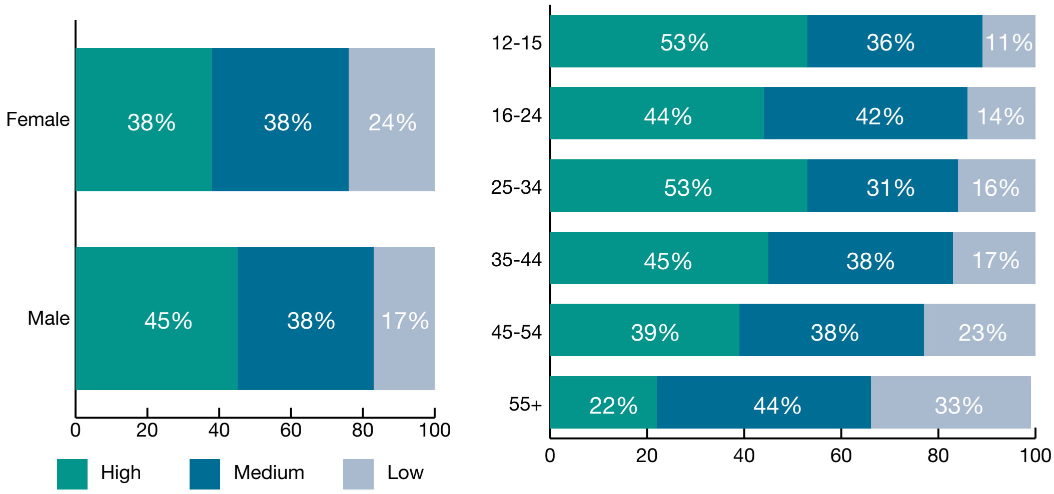
To get a broader sense of **their passion for music**, respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

- Four in ten (42%) displayed **high levels of passion for music**. This was most apparent in those aged 12-15 (55%) and least among those aged 55+ (24%).
- More generally, responses to specific statements indicated the **importance of music**. Three-quarters said that it is "central" to their lives (76%) or that it is their "favourite kind of entertainment" (74%).

A2. To what extent do you agree or disagree that each of the following statements describe you in relation to music?







Base: n=2,372 (downloaded, streamed, shared and/or purchased physical copies of music in the past 3 months)

Qualitative insights

For most, the value of music had been amplified during the COVID-19 pandemic. Although music was primarily an important source of **entertainment**, the **additional benefits** associated with listening to music proved to be particularly valuable to respondents during the challenging circumstances presented by the lockdown in the recent months. These benefits included being a **source of inspiration**, an **emotional outlet** and facilitating **mood uplift** and **relaxation.** All of these effects of music aided respondents in enduring a highly **unusual** and **difficult situation**.

- *"I feel less burden from being inside the house and in a better mood watching TV and listening to music. Music and films have helped me to have stability and a better mood."* - Male, 35-44
- *"Listening to music and watching movies on my laptop really help me to calm down, relax, kill boredom and to enjoy myself at the same time."* - Male, 25-34
- *"Watching/listening to music is a must for me and my household. We love music and almost always have music on in the background if the TV is not on."* – Female, 35-44

Respondents engaged with music **frequently** despite many facing significant changes to daily routines, including no longer commuting which was often a key occasion for listening to music. Most found that overall, reductions in specific listening occasions were offset by generally having more time in their day to listen to music compared to before. Additionally, as music often accompanied several different activities such as exercise, getting ready for the day or cleaning, many respondents **retained a similar routine** in their daily listening habits but with the addition of more free time to listen.

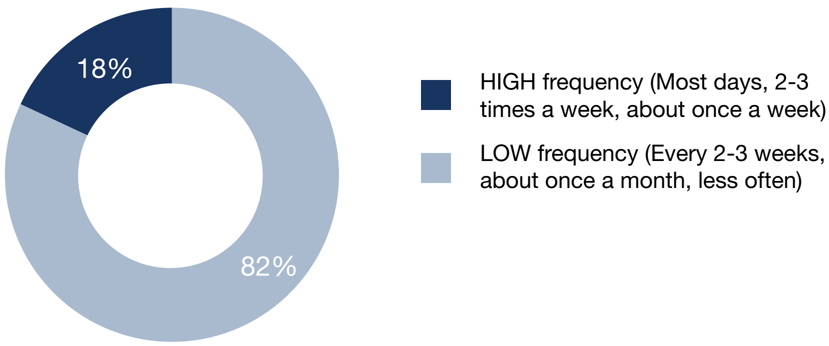
- *"I have music on in the background when I am home and I have music on my phone when I am out and about."* - Female, 25-34
- *"I do not have a set time of the day when I listen to music, it rather depends on certain activities, especially at the time of the pandemic. At the moment I would generally listen to the music in the mornings, while having breakfast and catching up on emails, work and world news. Music would normally be in the background in the form of radio on laptop or YouTube videos."* - Male, 35-44
- *"During Covid we have had more time available therefore I have listened to more music."* – Female, 45-54

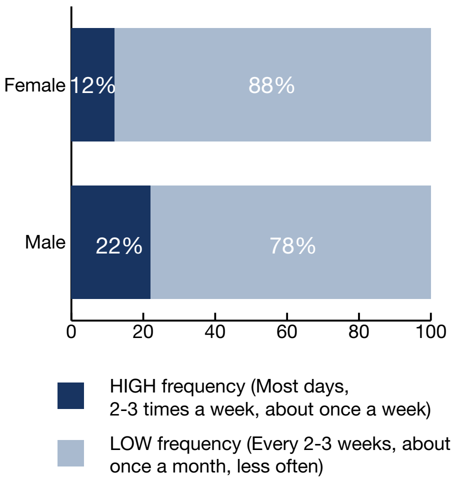
Physical purchasing of music

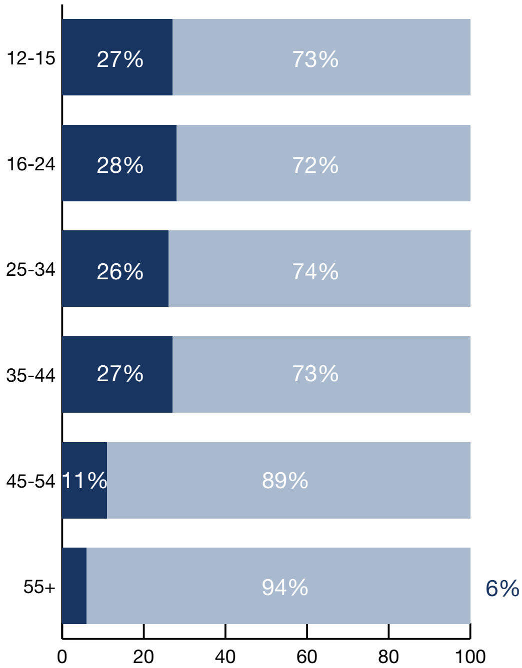
The 11% of respondents who had purchased music in physical formats, specifically CDs or vinyl, during the previous 3 months were asked more questions around frequency and number of purchases made.

- Only a minority (18%) of these were **frequent purchasers** of CDs or vinyl records.
- Consumption of physical items before COVID-19 was unchanged for over half (55%) of these respondents. The remainder were evenly split between those who had purchased more or less.
    - Before COVID-19, physical purchasers bought, on average, 11 items every three months.
    - During the previous three months the amount they had bought remained largely unchanged with, on average, 10 items purchased.
- Male respondents were, compared to females, more likely to make physical purchases frequently and in larger amounts.

A3. Generally, how often do you purchase physical CDs or vinyl records?

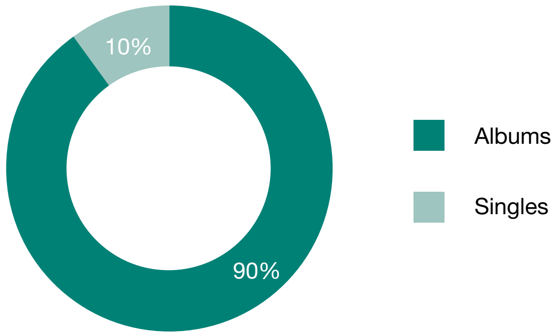






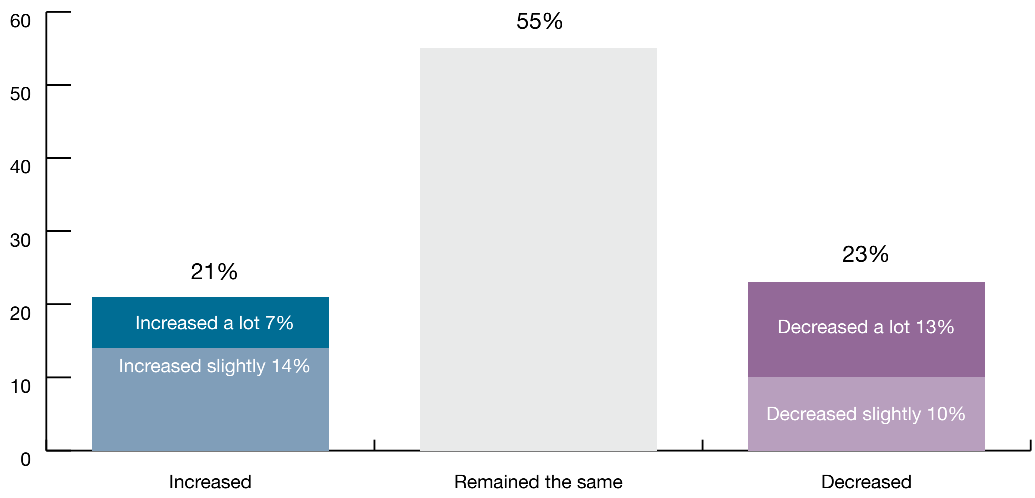
Base: n=563 (purchased physical copies of music in the past 3 months)

A4. And of your physical music purchases, how many were albums and how many were singles?



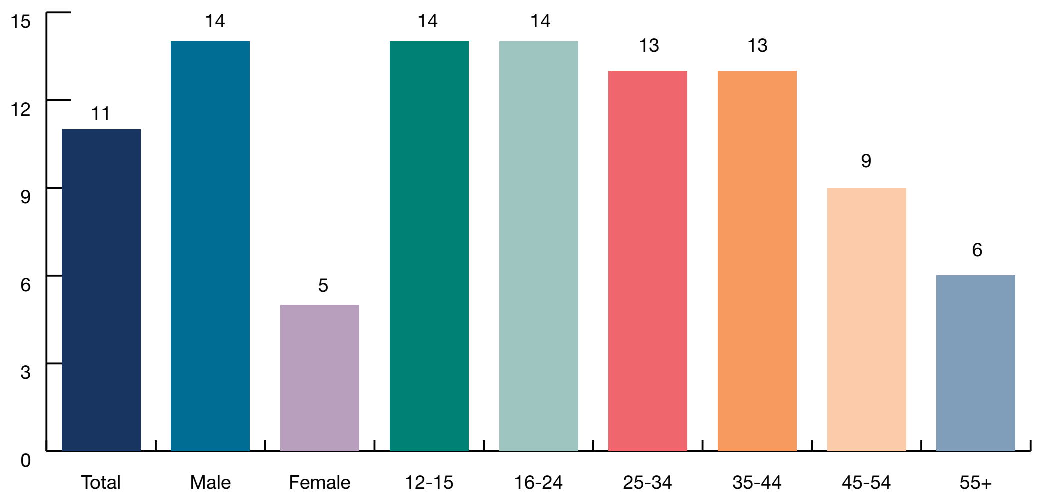
Base: n=563 (purchased physical copies of music in the past 3 months)

A5. Since the coronavirus (COVID-19) outbreak, would you say the amount of physical music products you have purchased has...?

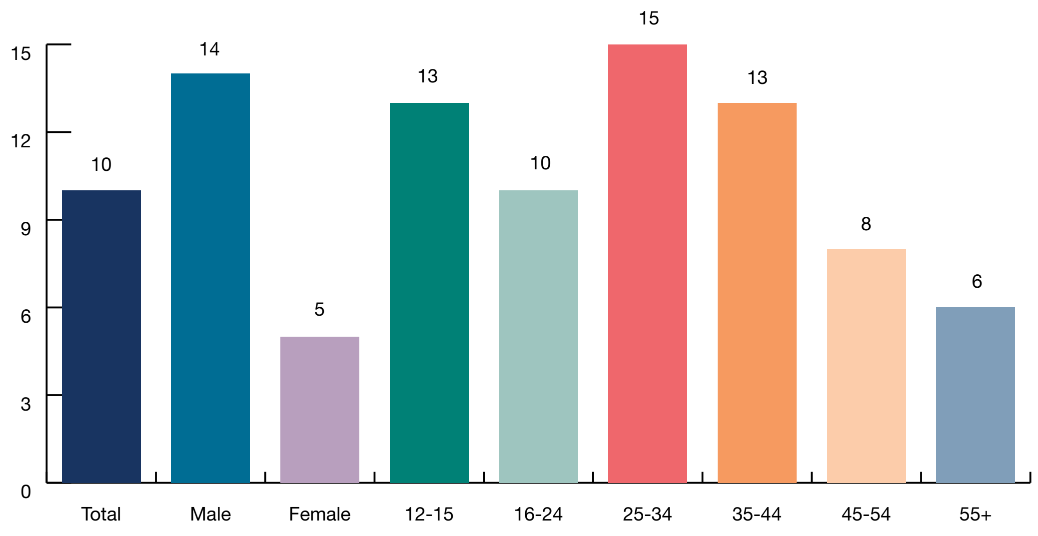


Base: n=563 (purchased physical copies of music in the past 3 months)

A6. Before the coronavirus outbreak, how many physical music products (CDs, Vinyl etc.) would you say you used to purchase in 3 months? (Average purchases)



A7. In the past 3 months how many physical music products (CDs, Vinyl etc.) did you purchase? (Average purchases)



Base: n=508 (purchased physical copies of music in the past 3 months)

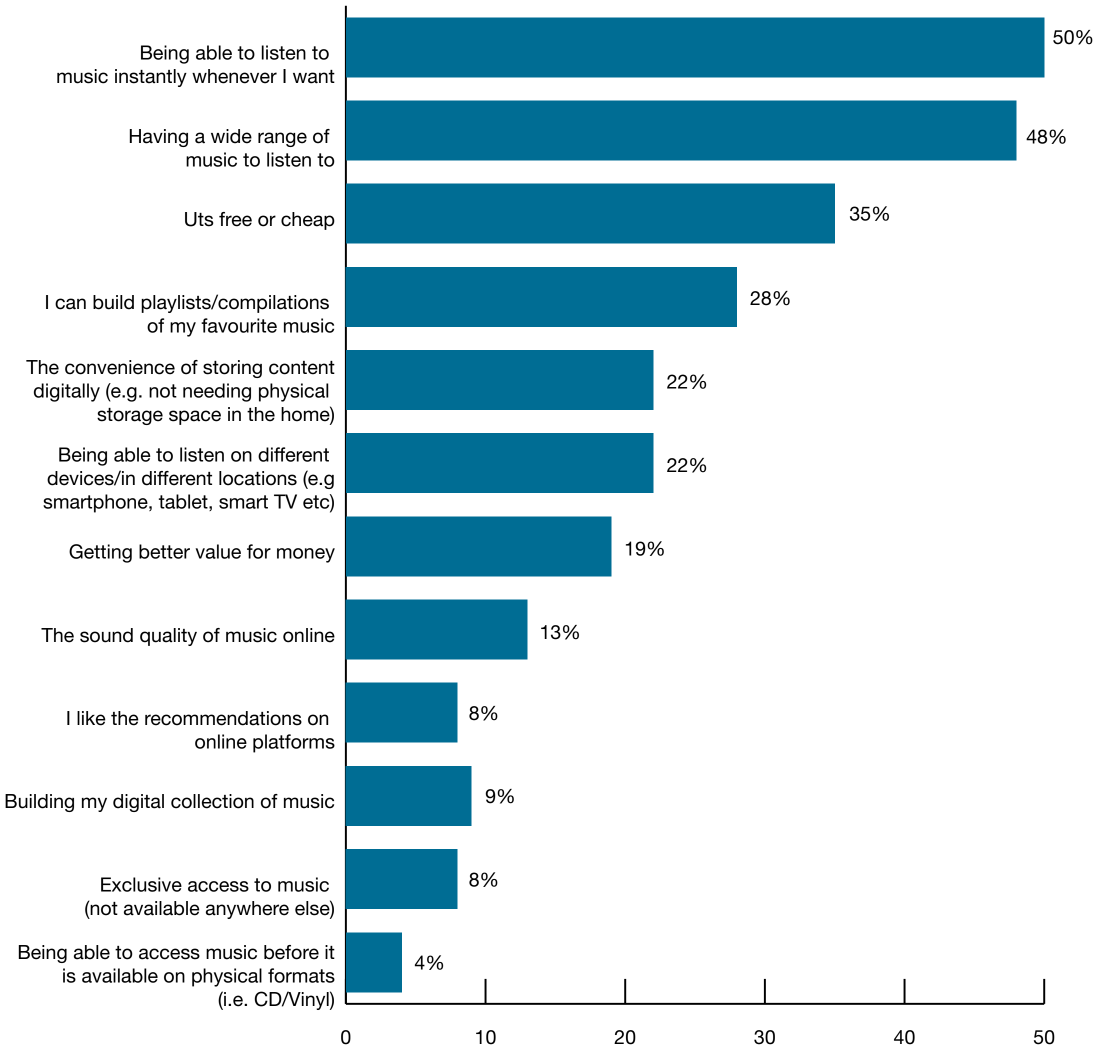
Understanding online consumption of music

To better understand the drivers of online consumption, those who had streamed or downloaded music in the previous 3 months were asked to select their top three reasons for accessing music online.

- It is noteworthy that no single reason was selected by more than half of respondents. The two most selected, by some way, related to **convenience** ("Being able to listen to music instantly whenever I want" 50%) and the **range** of options available ("Having a wide range of music to listen to" 48%).
- **Price** ("It's free or cheap" 35%) was the third most popular reason and somewhat ahead of the rest.

- The above three reasons were consistently selected across genders and all age groups.
- **Added value features**, such as sound quality and having a more tailored listening experience through playlists or recommendations were notably less valued.

A8. What are the main reasons that you choose to access music online (i.e. downloading or streaming) Please select your top 3 (%)



Base: n=2,182 (downloaded or streamed music online in the past 3 months)

Male respondents	Female respondents
1. Being able to listen to music instantly whenever I want (48%) 2. Having a wide range of music to listen to (47%) 3. It's free or cheap (35%)	1. Being able to listen to music instantly whenever I want (52%) 2. Having a wide range of music to listen to (49%) 3. It's free or cheap (35%)

Aged 12-15	Aged 16-24
1. Being able to listen to music instantly whenever I want (46%) 2. Having a wide range of music to listen to (44%) 3. It's free or cheap (32%)	1. Being able to listen to music instantly whenever I want (54%) 2. Having a wide range of music to listen to (49%) 3. I can build playlists/compilations of my favourite music (36%)
Aged 25-34	**Aged 35-44**
1. Being able to listen to music instantly whenever I want (48%) 2. Having a wide range of music to listen to (43%) 3. It's free or cheap (32%)	1. Having a wide range of music to listen to (51%) 2. Being able to listen to music instantly whenever I want (49%) 3. It's free or cheap (32%)
Aged 45-54	**Aged 55+**
1. Being able to listen to music instantly whenever I want (53%) 2. Having a wide range of music to listen to (51%) 3. It's free or cheap (37%)	1. Having a wide range of music to listen to (49%) 2. Being able to listen to music instantly whenever I want (48%) 3. It's free or cheap (46%)

Qualitative insights

The importance of online consumption of music, both before as well as during the lockdown, was apparent in the qualitative discussions. For most respondents, online sources were used for the **bulk of listening time**, with YouTube and Spotify being among the **most popular** platforms for many. Radio was used intermittently by some, particularly when in the car, while CDs and vinyl were generally more of a rarity.

- *"In terms of music accessed online these days, it would probably be about 90%, and the rest via car radio and disks, FM radio etc but even this proportion is decreasing."* – Male, 35-44

Respondents highlighted how the benefits of online access such as the **extensive range of content** and **convenience** made it the most **appealing** way to consume music. Additionally, they found the fact that many online sources **come at a low (or no) cost** attractive.

- *"You can find anything from any era and you can also find different mixes to the songs too."* - Male, 35-44
- *"[I like] YouTube, because of the videos and variety of music. Then there is Spotify as it is convenient, and I have playlists which I can use anytime plus the quality of sound is better."* – Female, 25-34
- *My favourite music platform by far is YouTube because it allows me to access a vast number of music videos and songs from around the world and of pretty much any period of time… When not at home, I tend to use SoundCloud (free version) … The least I have been using to listen to music is the car radio or CD."* - Male, 35-44

During the COVID-19 pandemic, some reported an increase in listening to music online. Along with listening to existing music, most had more time to spend discovering new music, with online seen as the quickest and easiest method – streaming in particular was the most popular form of access.

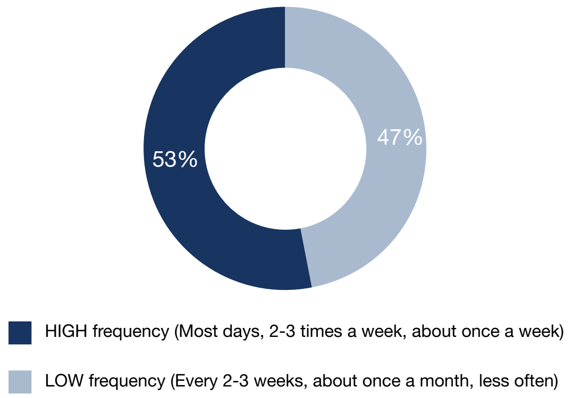
Downloading music

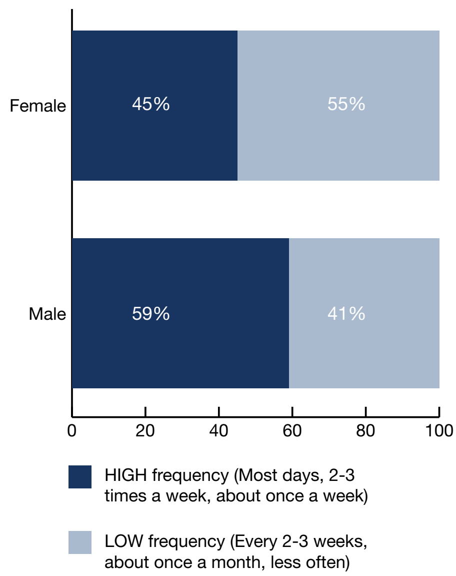
The 23% who had downloaded music during the previous 3 months were asked more questions around frequency, volume and sources used.

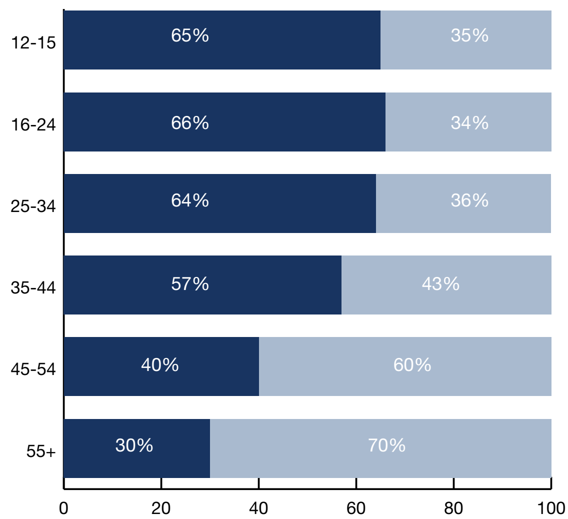
Frequency and volume of downloading music

- Over half (53%) of those who download music do so frequently (i.e. at least once a week). **Weekly downloading was more common among younger age groups**, with 66% of those aged 16-24 doing so.
- The amount of music tracks downloaded since the COVID-19 pandemic had increased for four in ten (41%). It was unchanged for over half (52%) of respondents, with very few (7%) saying it had decreased.
    - Before COVID-19 respondents had downloaded, on average, 83 tracks every three months.
    - During the previous three months, however, the amount they had downloaded had increased to, on average, 105 tracks.
    - In both instances, downloading was most prevalent among men and those aged 16-24.

A9. Generally, how often do you download music tracks or albums through the internet? (%)

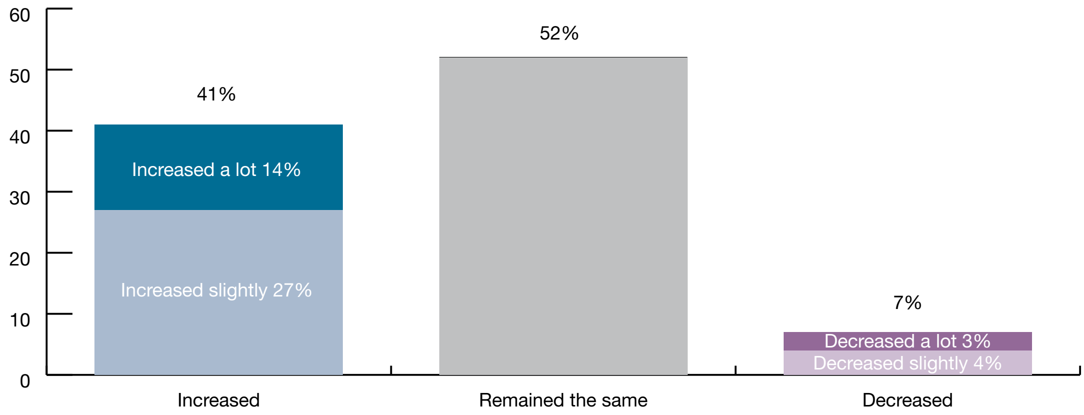






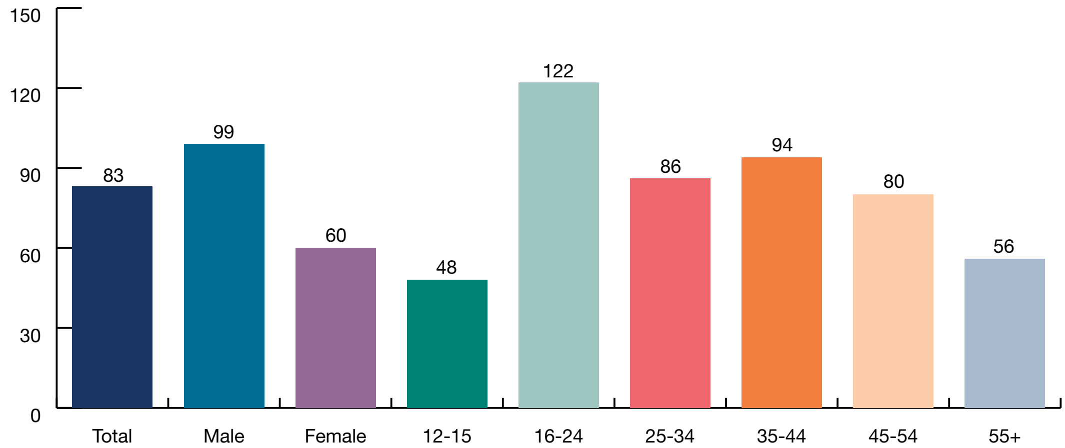
Base: n=1,175 (downloaded music in the past 3 months)

A10. Since the coronavirus (COVID-19) outbreak, would you say the number of music tracks you download has…?

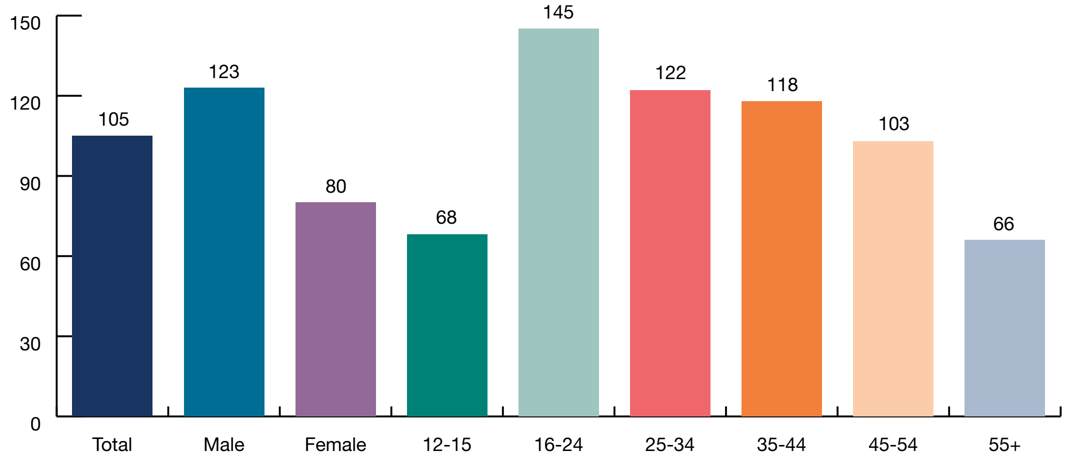


Base: n=1,175 (downloaded music in the past 3 months)

A11. Before the coronavirus outbreak, how many downloads would you say you used to purchase in 3 months? (Average purchases)



A12. In the past 3 months how many tracks did you download through the internet? (average number of downloads)



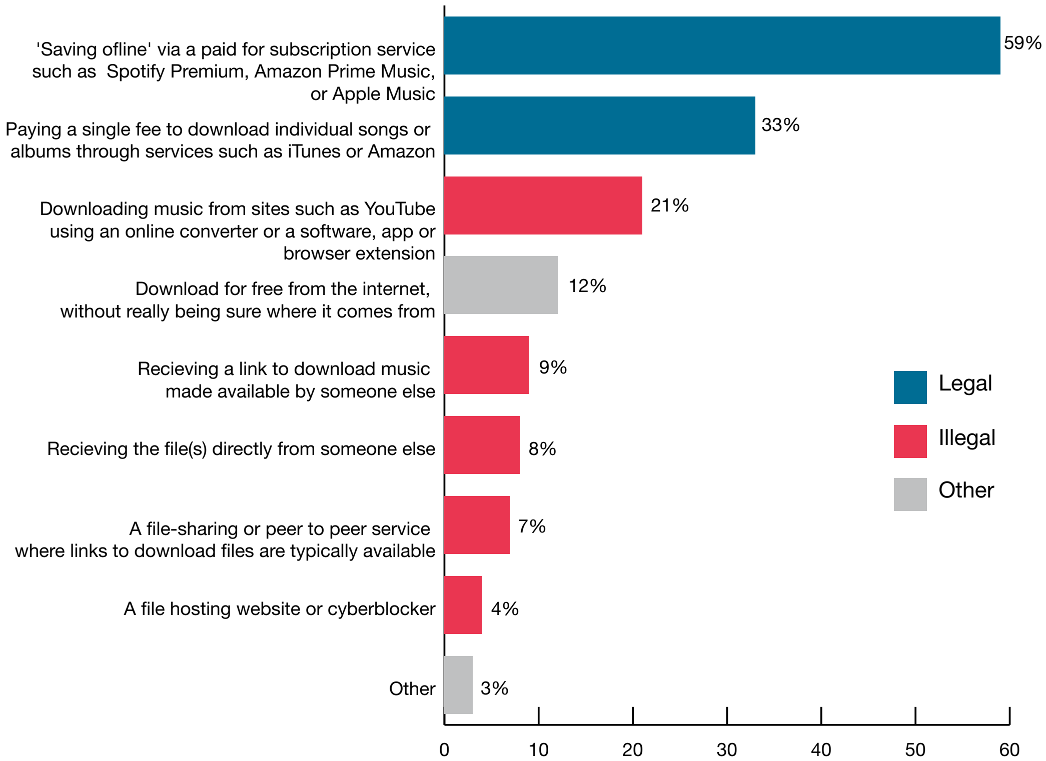
Base: n=1,131-1,161 (downloaded music in the past 3 months)

Sources of downloading music

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could download music. An 'unknown' option was also provided to serve as a catch-all for those who were unsure of the exact source.

- **The most commonly used sources were legal**. The most common, by some way, was "Saving offline" via a paid subscription service, undertaken by well over half (59%) of all music downloaders. This was followed by around a third (33%) who pay "a single fee to download individual songs or albums".
- The **most common illegal method was using either software, an app, a browser extension or an online converter (21%).** Other than this, no illegal method was selected by more than 9%.
- **'Saving offline' via a paid for subscription service** was notably more common among those aged 16-24, with three quarters (75%) having done so. Conversely, they were notably less likely than any other age group to have paid a single fee to download individual songs or albums, with only 20% having done so (10% less than any other age group).

A13. Which of the following have you used to download music in the past 3 months? Please select all that apply. (%)



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
'Saving offline' via a paid for subscription service such as Spotify Premium, Amazon Prime Music, or Apple Music	57%	62%	60%	75%	64%	62%	49%	44%
Paying a single fee to download individual songs or albums through services such as iTunes or Amazon	36%	30%	37%	20%	37%	38%	39%	30%
A file hosting website or cyberlocker	5%	2%	7%	5%	5%	4%	2%	1%
A file-sharing or peer to peer service where links to download files are typically available	8%	5%	5%	5%	9%	8%	9%	3%
Downloading music from sites such as YouTube using an online converter or a software, app or browser extension	21%	20%	28%	27%	23%	15%	17%	18%
Receiving the file(s) directly from someone else	9%	7%	10%	4%	9%	10%	9%	5%
Receiving a link to download music made available by someone else	10%	8%	11%	6%	9%	9%	10%	11%
Download for free from the internet, without really being sure where it comes from	14%	11%	17%	11%	9%	10%	11%	19%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=1,175 (downloaded music during the past 3 months)

Download for free from the internet, without really being sure where it comes from

Those unsure of the source of their downloads were asked, **in a new question this wave**, to explain more about how they obtained them in their own words.

The most frequently mentioned route to finding music downloads was using a search engine (i.e. Google) and following links to a website or app. The approach therefore seems to be somewhat exploratory, and it appears that for many there is not a single "go to" website or app. Getting others to do the downloading for them is another option for some.

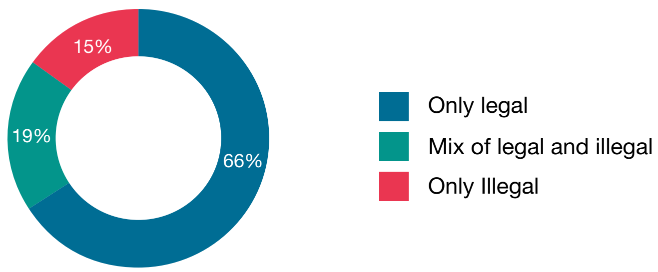
Legality of music downloads

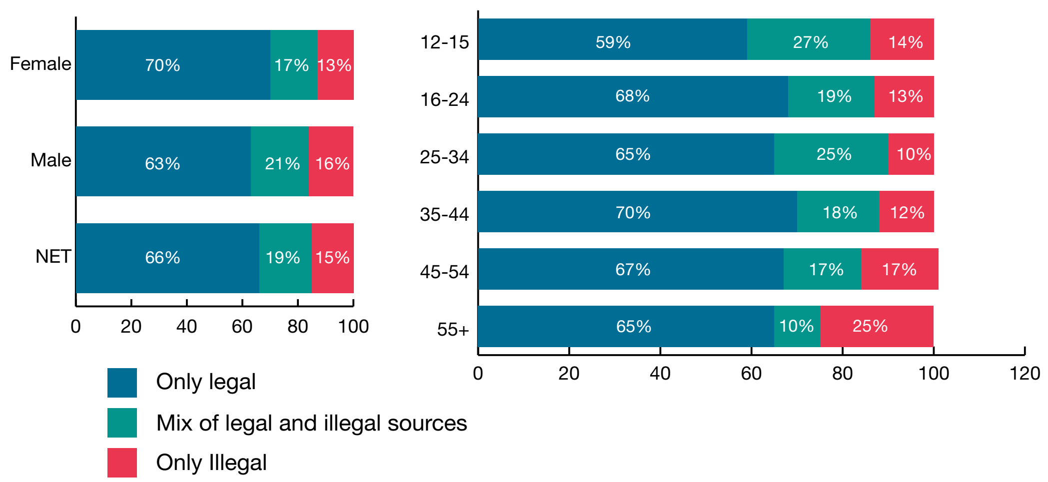
To better understand the distribution of sources across legal and illegal categories, those who had downloaded music in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

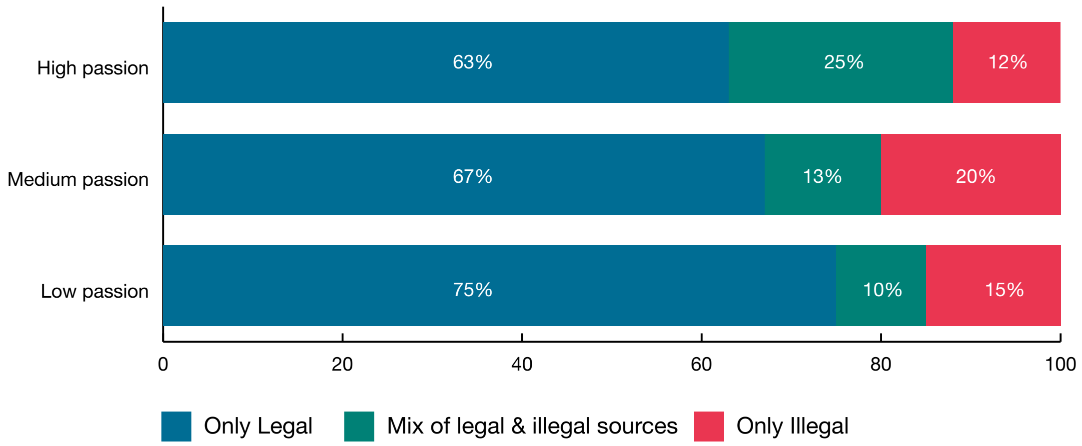
The answer option "download for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they **only** consumed content in this way was not included in the base.

- Legal Sources:
  - Overall 85% had used at least one legal source to download music.
  - The highest proportion (66%), by some way, had used only legal sources.

- Those aged 35-44 were most likely (70%) to have used only legal sources.
- Illegal Sources:
    - 34% had used at least one illegal source to download music.
    - 15% had used only illegal sources to download music.
    - Those aged 12-15 more most likely (41%) to have used an illegal source.
    - 37% of those with a high level of passion for music had used an illegal source, compared with 25% of those with a low level.
- Mixed:
    - 19% had used a mix of legal and illegal sources.
    - Use of a mix of legal and illegal sources was highest among those aged 12-15 (27%) and 25-34 (25%).
    - 25% of those with a high level of passion for music had used a mix of legal and illegal sources, compared with 13% of those with a medium level and 10% of those with a low level.







Base: n=1,102 (downloaded music in the past 3 months, with those who selected ‘other’ or ‘not sure of source’ removed).

A14. And how is the way you download music typically split across the following sources? (average % of their time and average number of downloads)

Legality	Source	Average % of usage split	Average number of downloads
Legal	‘’Saving offline’ via a paid for subscription service such as Spotify Premium, Amazon Prime Music, or Apple Music	49%	129
	Paying a single fee to download individual songs or albums through services such as iTunes or Amazon	23%	11
Illegal	A file hosting website or cyberlocker	1%	2
	A file-sharing or peer to peer service where links to download files are typically available	3%	8
	Downloading music from sites such as YouTube using an online converter or a software, app or browser extension	9%	7
	Receiving the file(s) directly from someone else	2%	3
	Receiving a link to download music made available by someone else	2%	2
Other	Download for free from the internet, without really being sure where it comes from	7%	3
	Other	3%	6

Base: n=1,175 (downloaded music in the past 3 months)

Qualitative insights

The qualitative discussions highlighted that, for most respondents, illegal music downloads were a means of **supplementing legally sourced music** rather than the primary means of accessing music.

While the desire for **access to offline music** and **minimising cost** were generally popular reasons to illegally download in regular circumstances, the need for offline access had **changed** for some respondents during the **COVID-19 pandemic.** Some respondents found that the need for offline access had subsided somewhat during lockdown as they spent more time at home with a **stable internet connection**. Nonetheless, some were still concerned that they may find themselves in a situation where internet was **insufficient or unavailable** and therefore preferred to have their music downloaded. Other drawbacks of legal methods, such as having to listen to adverts, also contributed to the continued use of illegal methods during lockdown.

- *"In general, I prefer downloading to streaming as sometimes due to internet connection dropping, it can be a bit of a nuisance. Although now we are in lockdown I do tend to stream more as it is more convenient."* – Male, 35-44

- *"I have more time now, so I am able to stream more than download. Before I did not have time at all so I downloaded more so I could listen to music during travelling and eating my lunch."* – Male, 35-44

Although respondents identified many drawbacks to downloading music by using illegal methods, such as exposure to **viruses or hacking**, being **unethical** and, for some methods, the **time and effort** required to download tracks, the benefits of accessing content for free **outweighed the risk and inconvenience.** Being **free** of cost, not needing to listen to **adverts** and being able to **listen offline** were all strong enough motivators for respondents to take their chances with illegal methods.

- *"The disadvantages are the unknown origin and the risk of using a potentially dangerous source… Stealing of your data, scammers track you down and then access your personal details. It's more the unknown that scares me and also the use of a source that can damage the artists by not paying them the copyright. We all well know that behind something free there is someone taking advantage."* - Female, 45-54

- *"Weaknesses: Lots of ads and I feel my PC can be infected every time I try to convert a video to mp3."*- Male, 35-44

- *"You can use a convertor to download the songs individually which then gives you the option of not having to pay the premium for Spotify to remove the adverts. Once you have downloaded the converted songs, you then have it and are free to put onto whichever device you like, it doesn't matter if you are not connected to the internet you can still listen to them. I use this the most. It is quite important as I can choose what I want to listen to, make my own playlist, not have to listen to adverts and I don't have to be connected to the internet to listen to it."* – Male, 35-44

Respondents with access to premium music subscriptions tended **to favour these** as a method of downloading music legally. The ability to **download music anywhere** that they had an internet connection was particularly valued. Accessing most of their music via a legitimate method was also a **comfort** to some respondents, as it meant they did not have to worry as much about any **legal consequences**. Yet, overall, factors such as cost of downloads, content being unavailable and concerns around offline access meant that respondents often fell back on illegal methods.

- *"My preferences are downloading the music from paid websites like Spotify, because they are legal and ethical companies and I do not risk any legal action taken against me… I have been with Spotify for 12 months and it is not free. I use Spotify most often as it gives me flexibility to download any music anywhere. If there are any weaknesses or drawbacks, it is only that it is costing me money… I have also been using YouTube to download for 5 years because it is free. Free access is saving money and time, because I would have to buy the music instead."* – Male, 35-44

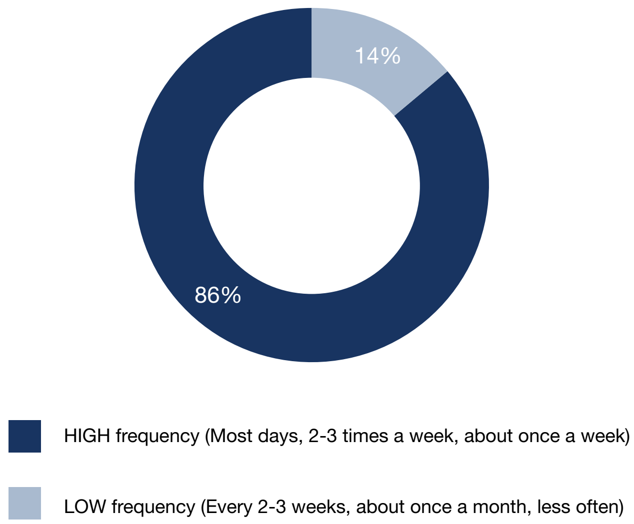
Streaming music

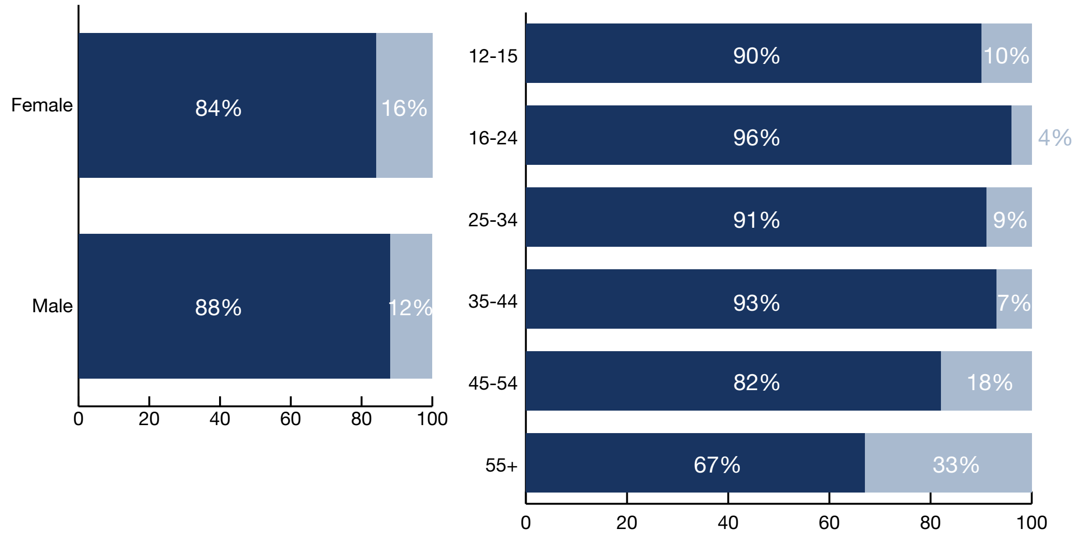
The 37% who had streamed music online during the previous 3 months were asked questions around frequency, volume and sources used.

Frequency and volume of streaming music

- **The majority (86%) of those who streamed music did so frequently** (i.e. at least once a week). This was significantly higher than the number who had downloaded music within the same time period (53%).
- The amount of music streamed since the COVID-19 pandemic had increased for over half (56%) of respondents. Approximately a third of respondents (38%) said the amount of music they had streamed hadn't changed, with very few (6%) saying it had decreased.
    - Before COVID-19 respondents had streamed, on average, 76 hours of music every three months.
    - During the previous three months the number of hours they had streamed had increased quite substantially to, on average, 105 hours of music.
    - In both instances, streaming was most prevalent among those aged 16-24.

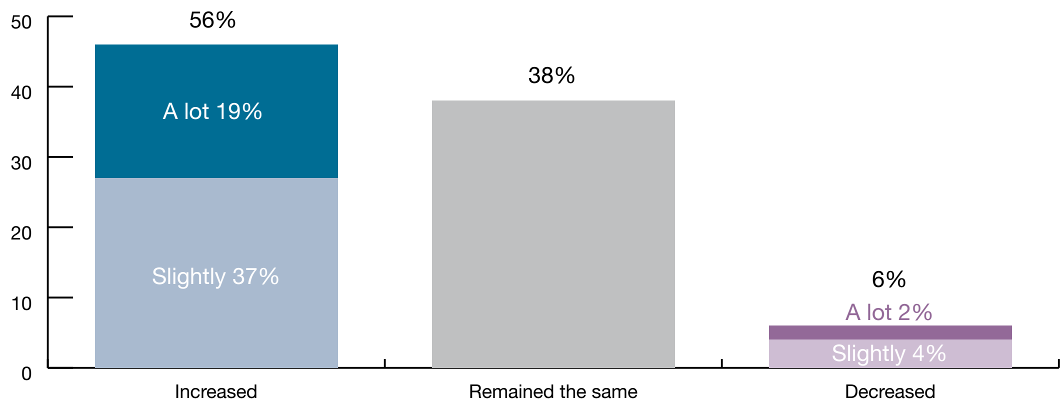
A15. Generally, how often do you stream music tracks or albums through the internet? (%)





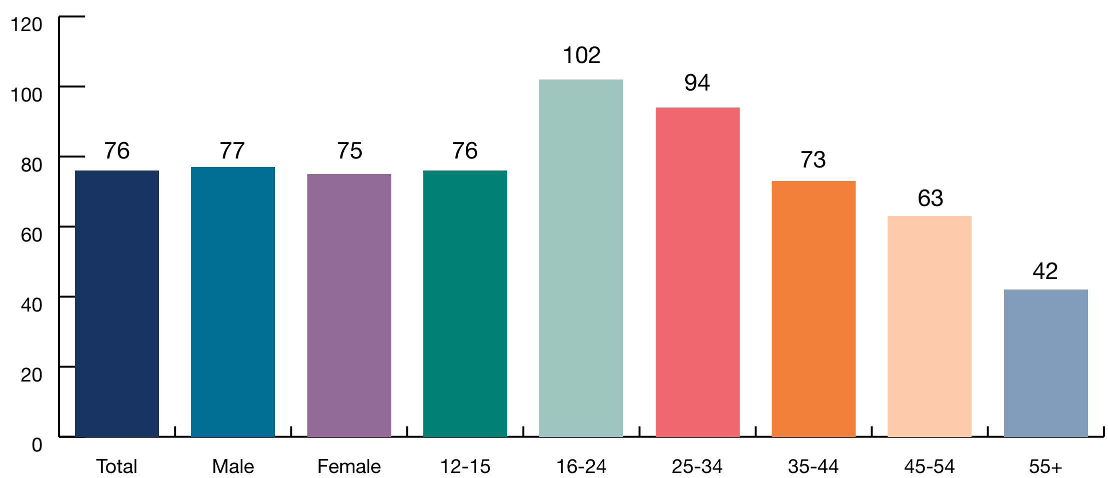
Base: n=1,887 (streamed music in the past 3 months)

A16. Since the coronavirus (COVID-19) outbreak, would you say the amount of time you spend streaming music through the internet has…?



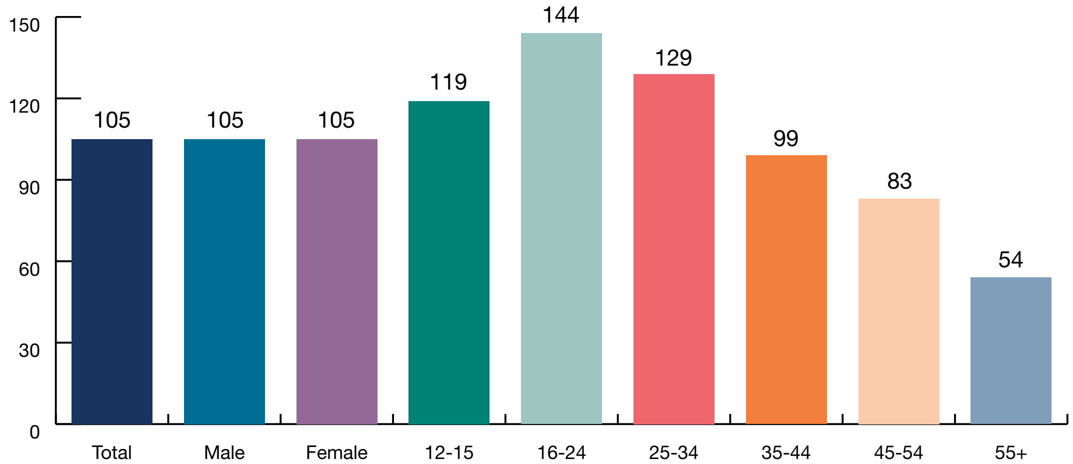
Base: n=1,877 (streamed music in the past 3 months)

A17. Before the coronavirus outbreak, how many hours would you say you spent streaming music through the internet? (3 months - average purchases)



Base: n=1,851 (streamed music in the past 3 months)

A18. In the past 3 months how many hours did you spend streaming music through the internet? (Average number of hours)



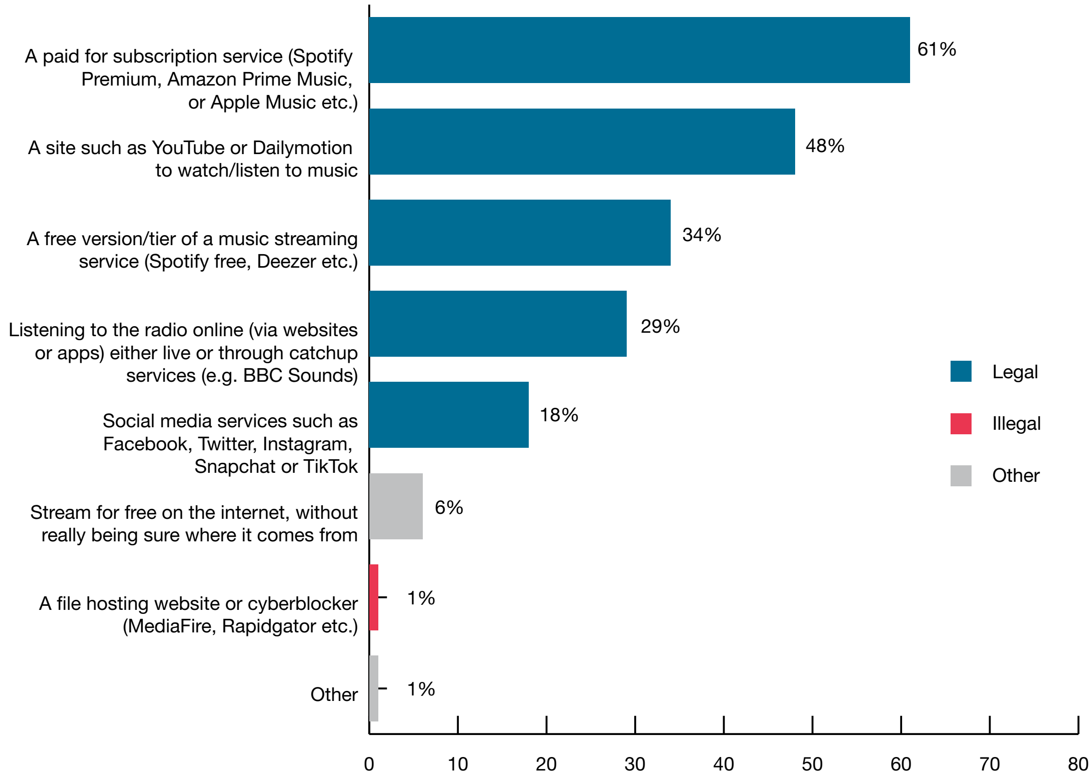
Base: n=1,851 (streamed music in the past 3 months)

Sources of music streaming

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could stream music. An ‘unknown’ option was also provided to serve as a catch-all for those who were unsure of the exact source.

- Compared to downloading, fewer illegal avenues were asked about in the survey and, encouragingly, only a small minority had used these.
- **Positively, the two most commonly selected sources included a paid option**. Over half (61%) had used “a paid for subscription service” (e.g. Spotify Premium, Amazon Prime Music, Apple Music etc.), and/or “a site such as YouTube” (48%).
- Those aged **16-24** were particularly likely to have embraced “a paid subscription” service, with over three quarters (78%) having accessed music in this way.
- **Listening to the radio online** was slightly less popular with younger respondents, with around a fifth (20-23%) of those aged 12-24 having done so in the previous 3 months. This compared to between 29-32% of those in the older age groups (i.e. 25+).
- The only **illegal method** tested, a “file hosting website or cyberlocker”, was used by just 1%.

A19. Which of the following have you used to stream music in the past 3 months? Please select all that apply (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
A paid for subscription service (Spotify Premium, Amazon Prime Music, or Apple Music etc.)	61%	61%	65%	78%	68%	59%	55%	40%
A free version/tier of a music streaming service (Spotify free, Deezer etc.)	34%	33%	37%	27%	33%	41%	34%	33%
Social media services such as Facebook, Twitter, Instagram, Snapchat or TikTok	17%	19%	23%	18%	19%	17%	15%	16%
A file hosting website or cyberlocker	2%	1%	2%	2%	3%	1%	0%	1%
A site such as YouTube or Dailymotion to watch/ listen to music	49%	48%	41%	54%	52%	46%	43%	50%
Listening to the radio online (via websites or apps) either live or through catchup services (e.g. BBC Sounds)	29%	29%	20%	23%	29%	33%	33%	32%
Stream for free on the internet, without really being sure where it comes from	7%	6%	10%	3%	5%	5%	8%	9%
Other	1%	1%	1%	0%	1%	1%	1%	2%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=1,187 (streamed music in the past 3 months from the listed sources, unsure removed)

Stream for free on the internet, without really being sure where it comes from

Those unsure of the source of their streaming were asked, **in a new question this wave**, to explain more about how they obtained them in their own words.

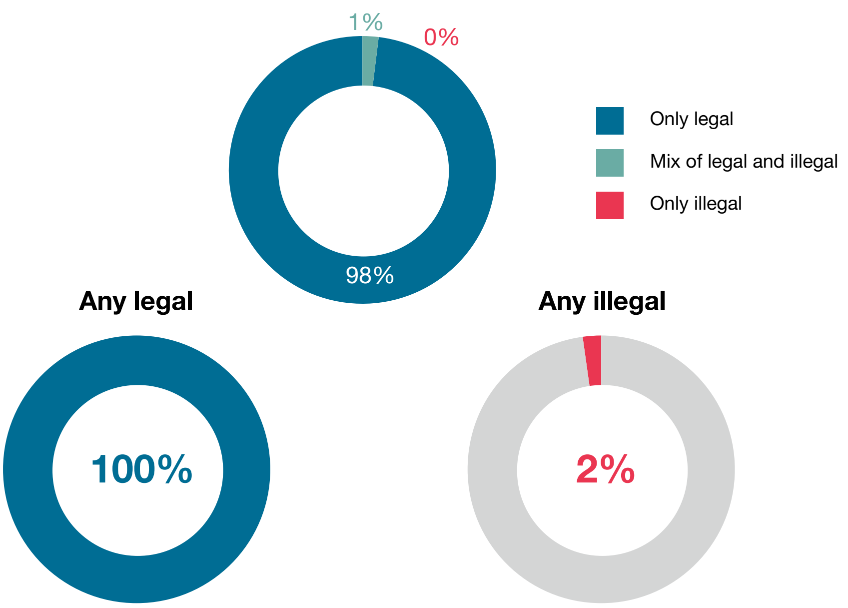
As with music downloading, the most frequently mentioned route to finding music for streaming was using a search engine (i.e. Google) and following links to a website (or to download an app). Also, again, a few mentioned getting "help" from a friend.

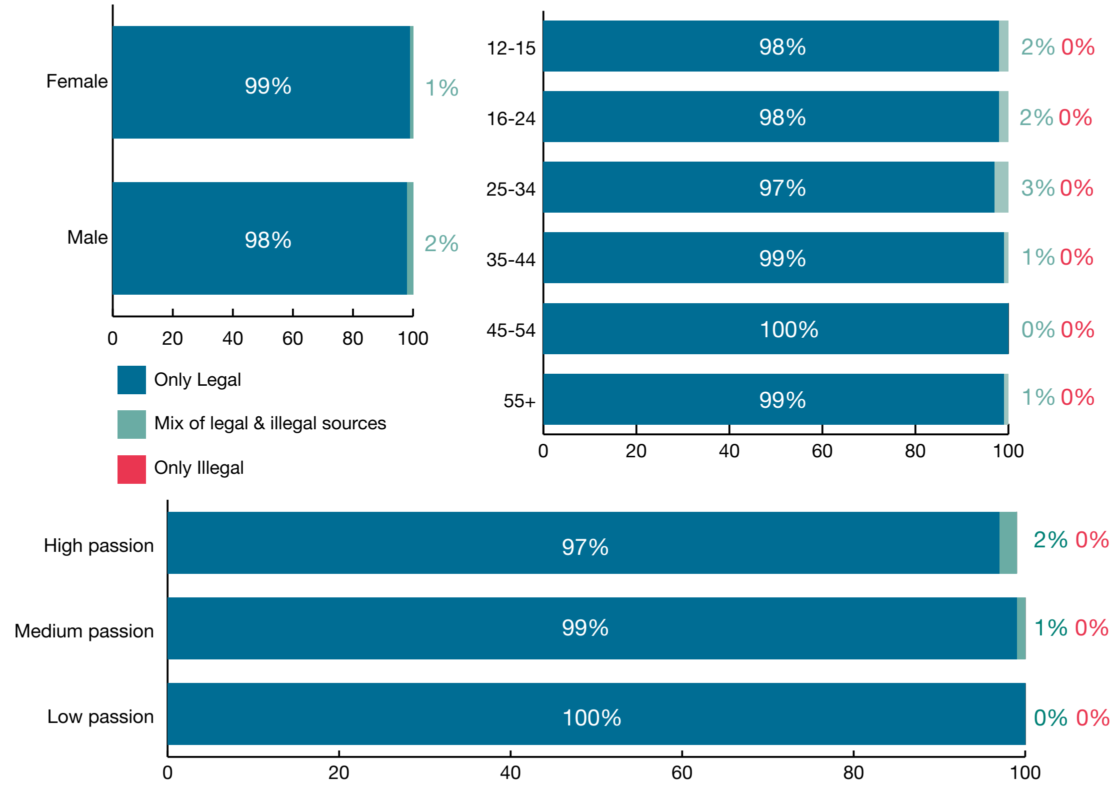
Legality of music streaming

To better understand the distribution of sources across legal and illegal categories, those who had streamed music in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

The answer option "stream for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they **only** consumed content this way was not included in the base.

- Legal:
    - In contrast to downloading, music was being streamed **almost entirely legally** with almost all respondents (98%) doing so.
- Illegal:
    - No respondents (0%) used only illegal sources to stream music.
- Mixed:
    - 1% had used a mix of legal and illegal sources to stream music.





Base: n=1,854 (streamed music in the past 3 months, with those who selected ‘other’ or ‘not sure of source’ removed)

A20. And how is your music streaming time typically split across the following sources?

Legality	Source	Average % of usage split	Average number of hours spent streaming
Legal	A paid for subscription service (Spotify Premium, Amazon Prime Music, or Apple Music etc.)	46%	59
	A site such as YouTube or Dailymotion to watch/ listen to music	20%	18
	A free version/tier of a music streaming service (Spotify free, Deezer etc.)	17%	14
	Listening to the radio online (via websites or apps) either live or through catchup services (e.g. BBC Sounds)	9%	9
	Social media services such as Facebook, Twitter, Instagram or Snapchat	4%	4
Illegal	A file hosting website or cyberlocker	0%	1
Other	Stream for free on the internet, without really being sure where it comes from.	2%	1
	Other	0%	0

Base: n=1,851 (streamed music in the past 3 months)

Qualitative insights

For most respondents in the online qualitative discussions, streaming was their **primary and preferred** means of accessing music. Owing to the improved availability of a **reliable internet connection, both at home and on-the-go via 4G,** and **cost-effective streaming subscriptions,** streaming had **replaced** downloads almost entirely for some.

- *"I used to download music so I could use it when there was no internet connection, but the latest developments in technology mean that internet now is of much more reliable quality and speed. So, having plenty of data allowance on my smartphone, I can stream large volumes of music and videos without having to be mindful about my data."* – Male, 35-44

- *"I used to download individual albums from iTunes but now this has been replaced by Spotify for a flat fee and unlimited access to all music. No competition."* – Female, 45-54

- *"In the past I used to listen to music via CDs, DVDs, then iTunes and file-sharing services like BitTorrent. Nowadays, it is largely limited to YouTube, digital radio websites and the SoundCloud app. The main benefits of these are they're free and easy to use and fit various life situations in unique ways too."* – Male, 35-44

Respondents tended to stream through **exclusively legal sources**, with most opting for those which were **freely available**. Downloads supplemented this – usually in situations where **internet access was unavailable**.

- *"I normally go streaming and download rarely when I want to listen to a song in the tube."* - Female 45-54

- *"I have always preferred streaming as that way I don't need the hassle of downloading music and saving it on my devices."* – Male, 35-44

Despite most finding that, in general, internet access had improved as well as mobile data packages, a few respondents **still had concerns** around how much data it took to stream music and the possibility of being stuck without a connection.

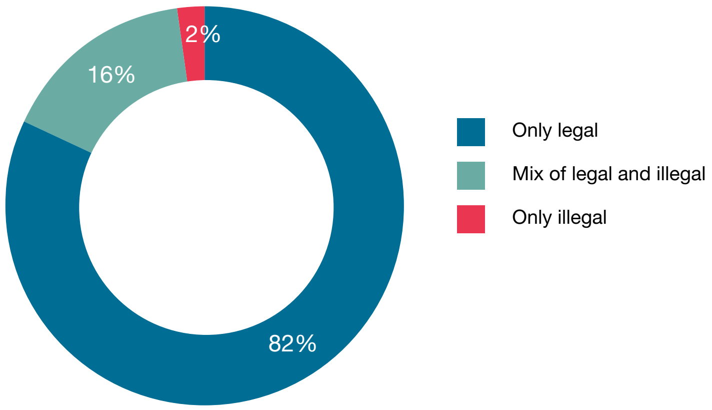
- *"Poor internet or no connection at all could mean these services are simply unusable."* - Male, 35-44

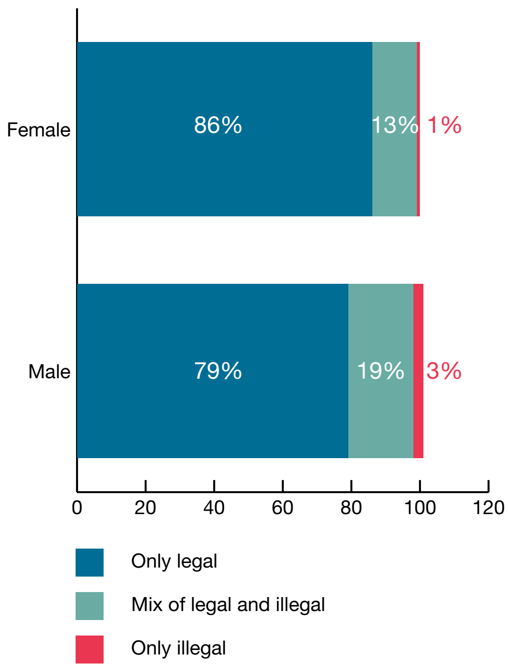
Combined downloading and streaming of music

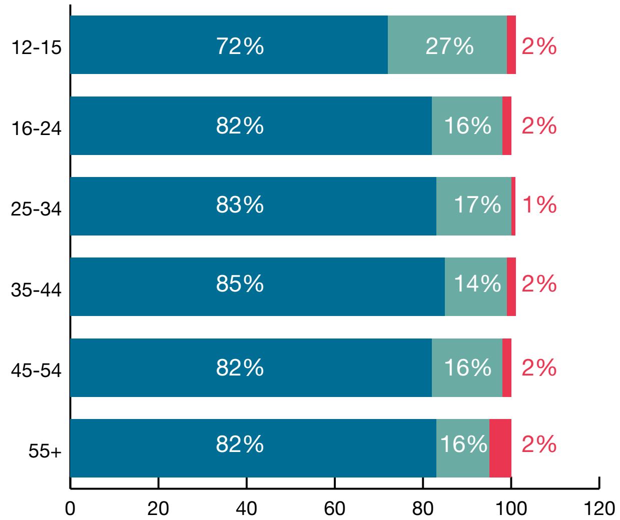
The use of legal and illegal sources for music access (i.e. for both downloading and streaming) were combined to allow us to look at the category as a whole. We would, however, express caution when interpreting these results, owing to the distinct differences in the legal and illegal figures for downloading and streaming independently.

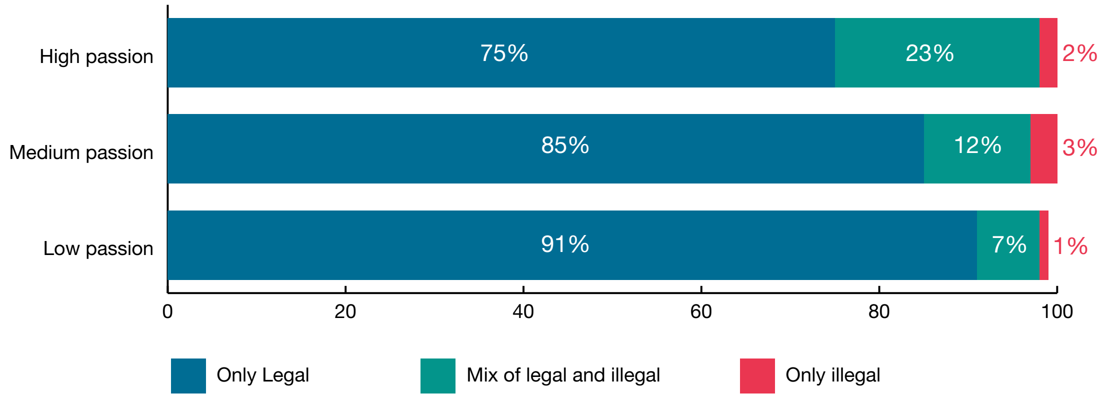
- Legal:
    - **82%** had consumed music online using legal sources only.
- Illegal:
    - **2%** had used illegal sources only to consume music online.
- Mixed:
    - **16%** had used a mix of legal and illegal sources to consume music online.

- This was most common in respondents aged 16-24 (23%) and 12-15 (22%).
- Those with a high passion level for music were more likely to use a mix (23%) of sources, compared to those with either a medium (12%) or low passion level (7%).









Base: n=2,126 (streamed and/or downloaded music from a legal or illegal source, with those who only selected 'not sure of source' removed)

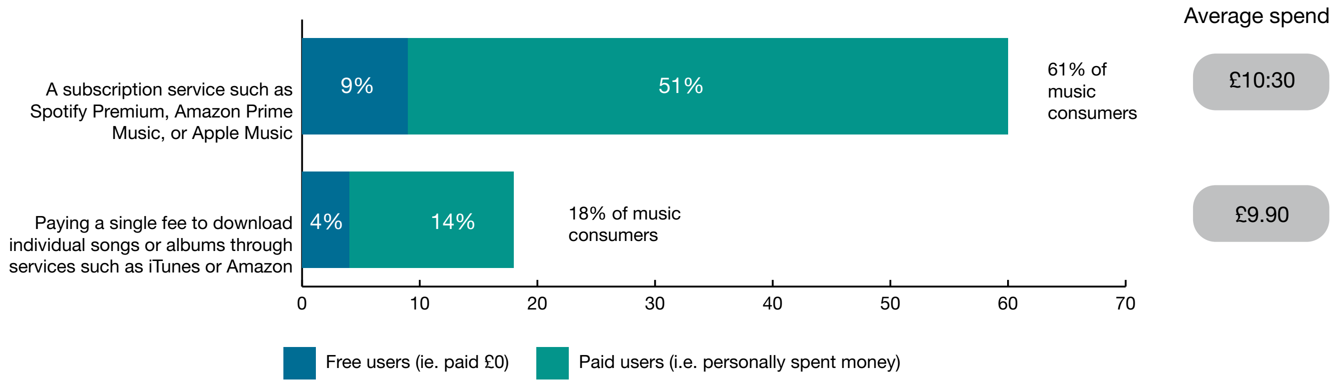
Paying for music

In a new question this wave, those who had used a paid source to either download or stream music were asked how much they had personally spent on each source.

- Six in ten (61%) music consumers over the previous three months said they had used **a paid subscription service** (e.g. Spotify) with most making a personal contribution towards a subscription (51%). They spent, on average, £10.30 each month.

- A significant proportion (18%) of music consumers had listened to music by paying **a single fee to download individual songs or albums** over the previous three months, although a large proportion (4%) hadn't made a personal contribution each month. On average, they spent a similar amount to that spent on streaming services (£9.90 each month).

A21. Approximately how much do you personally spend each month on the below sources of streaming or downloading music? (Proportion of music consumers over past three months using a paid source and average amount spent each month by users of that source)



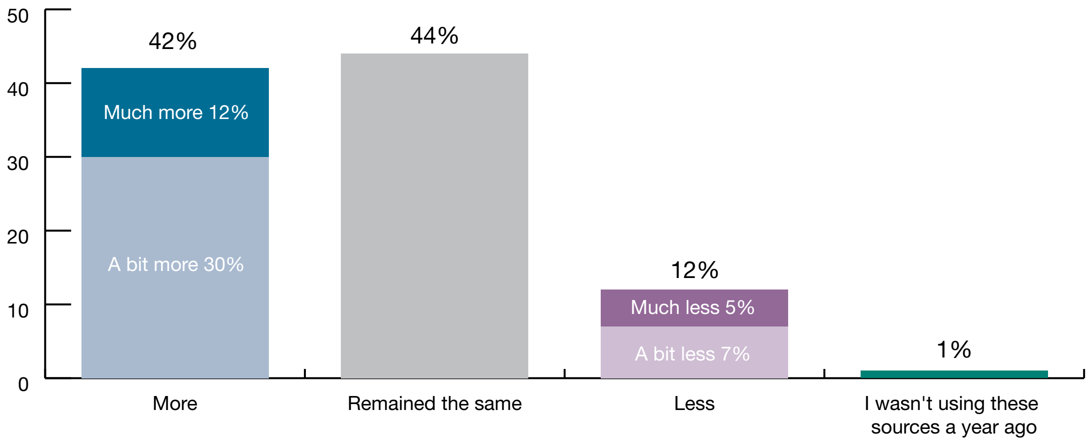
Base: n=2,182 (streamed and/or downloaded music)

Change in use of illegal sources

In a new question this wave, those who had used an illegal source to download or stream music were asked how the use of these sources compares to the same point a year ago.

- Respondents were fairly evenly split between those whose usage had remained the same (44%) and those whose had increased (42%). A relatively small number said their usage had decreased (12%) or that they weren't using these sources a year ago (1%).

A22. You said you download or stream music using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=387

Those whose usage of illegal sources had changed since the previous year were then asked to elaborate on the reasons for this change in an open-text question.

Those who were using illegal sources **more** than they were a year ago, explained that the most common reason for this was, by some way, the COVID-19 lockdown, mostly owing to the large increase in spare time. Other frequently cited reasons included the convenience of illegal sources and the fact that they are free. These were, however, both mentioned far less often.

- *"I have had more free time on my hands since early this year, I was briefly unemployed before the pandemic and became employed a week before lockdown commenced and then had to start working from home, so I have been listening to more music and downloading more at this time"* - Male, 35-44
- *"I have more time and am trying to keep myself entertained"* - Female, 25-34
- *"Listening to music more and getting bored of the same music quickly."* - Male, 35-44
- *"Easy to use and convenient to me."* - Male, 35-44

For those who were using these sources *less* than they were a year ago, having access to and preferring another source (in particular, subscriptions to services such as Spotify and Apple Music) was the most commonly provided reason for reduced use of illegal sources. Some also simply preferred to use physical formats, such as vinyl or CDs, or preferred to listen to the radio or simply opted to rely more on their existing library.

Changes in lifestyle had reduced the frequency of music listening for some respondents. In some cases, this was as a result of the COVID-19 pandemic and its impact on their daily routine, others simply did not have time or had less interest in listening to music. A few respondents also had concerns around the risks/consequences of illegal access, or felt their needs were not being met by them, which had led them to use such sources less often.

- *"I now have access to Spotify Premium instead."* - Female, 16-24
- *"I now use an Apple Music family subscription, whereas before I used a free-tier service and would download music from YouTube more frequently."* - Female, 16-24

- *"Because now I have a subscription to Apple Music, which I hadn't a year ago."* - Female, 16-24
- *"I collect vinyl, so prefer that format."* - Male, 35-44
- *"I commute less so require downloaded music less often."* - Female, 16-24
- *"I'm not sure about their legality anymore and I am wary of doing something online that I should not do. I seldom see any clear guidance as to whether or not it is acceptable to use such sites so I prefer to err on the side of caution."* - Male, 55+
- *"They are less reliable and have more viruses."* - Male, 25-34

The small number of respondents who had **started using** these sources for the first time (since the same point last year) highlighted that they were drawn to the new sources by content that they had not come across on other platforms, and by simply becoming aware of the illegal sources for the first time.

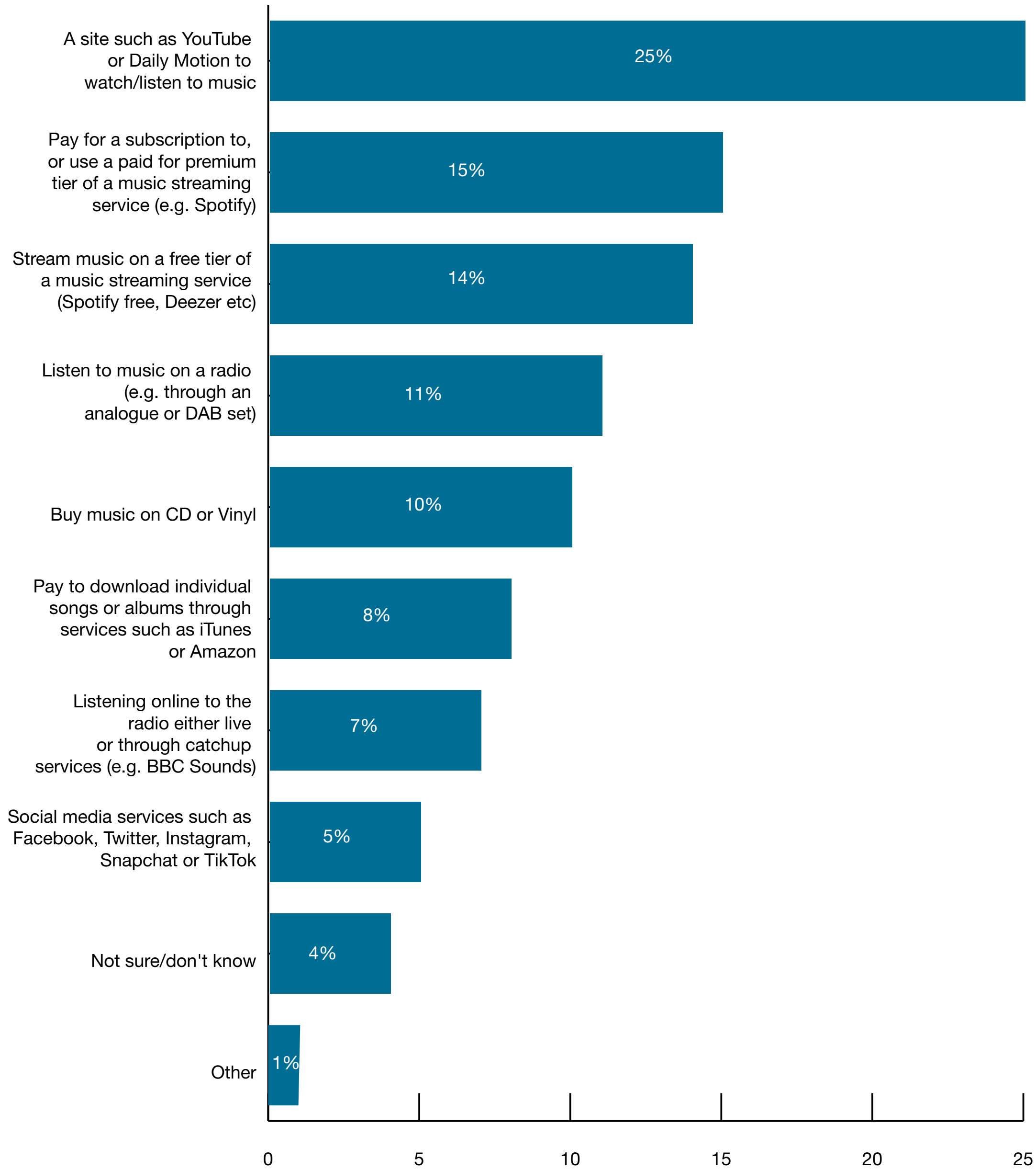
- *"Extra tunes and bands I haven't heard of"* - Male, 45-54
- *"I was told they exist"* - Female, 25-34

Alternatives to infringement

Those who had used illegal sources to either download or stream music were asked which **single** legal source they would use if they could no longer access music illegally.

- Overall, free options (e.g. "a site such as YouTube", selected by 25%) were more commonly selected than paid alternatives.
- There are, however, some indications that removing illegal sources would lead to an increased uptake in paid alternatives. When combined, the three paid options *('Pay for a subscription to, or use a paid-for premium tier of, a music streaming service', 'Pay to download individual songs or albums through services such as iTunes or Amazon'* and *'Buy music on CD or Vinyl')* were selected by around a third (33%) of our sample.

A23. If music was no longer available to download or stream via these sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
A site such as YouTube or Daily Motion to watch/listen to music	22%	31%	20%	40%	29%	27%	23%	12%
Pay for a subscription to, or use a paid-for premium tier of a music streaming service (e.g Spotify, Apple Music)	17%	12%	17%	24%	14%	18%	15%	6%
Stream music on a free tier of a music streaming service (Spotify free, Deezer etc.)	13%	14%	12%	12%	9%	16%	12%	22%
Listen to music on a radio (e.g. through an analogue or DAB set)	13%	7%	7%	7%	7%	7%	16%	22%
Buy music on CD or Vinyl	9%	12%	6%	5%	8%	14%	14%	14%
Pay to download individual songs or albums through services such as iTunes or Amazon	8%	8%	11%	3%	13%	9%	5%	6%
Listening online to the radio either live or through catchup services (e.g. BBC Sounds)	7%	7%	9%	0%	13%	5%	4%	9%
Social media services such as Facebook, Twitter, Instagram, Snapchat or TikTok	4%	5%	16%	5%	5%	0%	2%	1%
Not sure / don't know	4%	4%	2%	5%	2%	2%	9%	6%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=387 (downloaded and/or streamed music illegally)

Qualitative insights

Once the prospect of removing illegal sources as forms of access was explored in the qualitative discussions, many respondents were not perturbed nor felt their listening experience would be badly affected. They felt that the wide range of existing free legal options would be **sufficient in meeting their needs.** Many even expressed that it would be a **relief** to know the methods they were using were legal, as this was not always apparent. Some seemed to have been suspicious that these methods were illegal but had chosen not to confirm their assumptions through further investigation.

- *"I always suspected that BitTorrent and music conversion websites are somewhat likely not to be genuine and legal and therefore tried to avoid them particularly as there is an abundance of other available means, many of them are free anyway. If I had no choice of free music, I would pay. But as far as I can use YouTube, SoundCloud and digital radio I will."* – Male, 35-44
- *"I would feel happy, because I have lots of options and I know they are legal and ethical companies*." – Male, 35-44
- *"In such a world, I would feel very reassured. When downloading or streaming music, I wouldn't worry whether music is coming from a legitimate source or not. I would also know, that my actions will directly or indirectly contribute to music production and promotion."* – Male, 35-44

For some, however, this was a more concerning prospect. Such respondents had quite an **emotional response** to the idea and were unhappy with the thought of having to make certain **sacrifices** in the way they consume music; specifically, having to give up free downloads. In the context of the COVID-19 pandemic, a couple mentioned that accessing music by whichever means possible had been of **crucial importance** and had helped them **stay calm** and, in some cases, manage their **mental health**.

- *"I would be quite upset if I couldn't download my music for free, it's the only thing I do get for free."* – Male, 35-44

- *"I would be very sad I couldn't download my music. It would be a sad world. I don't mind where the music is from as long as it's free."* – Female, 25-34

- *"Generally speaking, the entertainment industry has played a vital role in maintaining my sanity and mental health during this lockdown and I couldn't even imagine not being able to access it either way (paid or free)... Music especially has been my source of joy and relaxation during this period"* - Female, 16-24

When prompted to explain how they would stream music if the method they currently used became unavailable, respondents consistently suggested **alternative legal methods**, whereas when the same question was asked of downloads, most suggested another **illegal method**.

- *"In terms of streaming a particular artist's song or album, I would largely use YouTube or SoundCloud by typing the name of the artist or album into the search field." - Male, 35-44*

- *"Without any doubt, the first place I would go in this case would be YouTube (Free) as I don't know any other site holding as much music sharing for free, as YouTube…"* - Male, 35-44

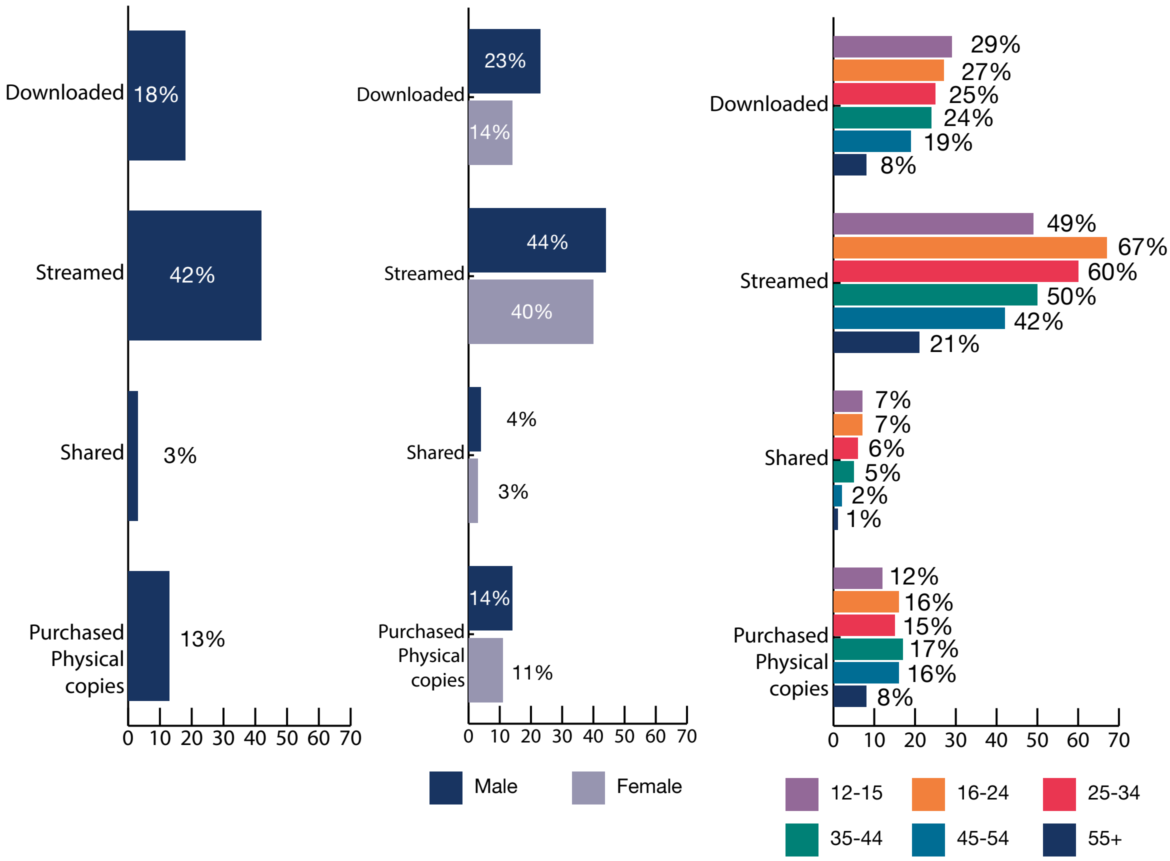
- *"If I want to stream Olly Murs' latest album on YouTube and YouTube is not available, I would go to the artist website where I can stream his music. If again this is not possible, I would ask the artist on Facebook how can I stream his music for free."* - Male, 35-44

Engaging with film

50% had engaged with film in the previous 3 months (i.e. either by downloading, streaming, sharing or purchasing physical copies of full-length films).

- **Streaming was, by some way, the most commonly used method of accessing films**, with 42% having done so. It was even higher among those aged 16-34, compared to older or younger age groups.
- Downloading followed at 18%, with only slightly fewer having purchased physical copies (13%).

B1. Have you downloaded/streamed/shared[4]/purchased physical copies of full-length films in the past 3 months?



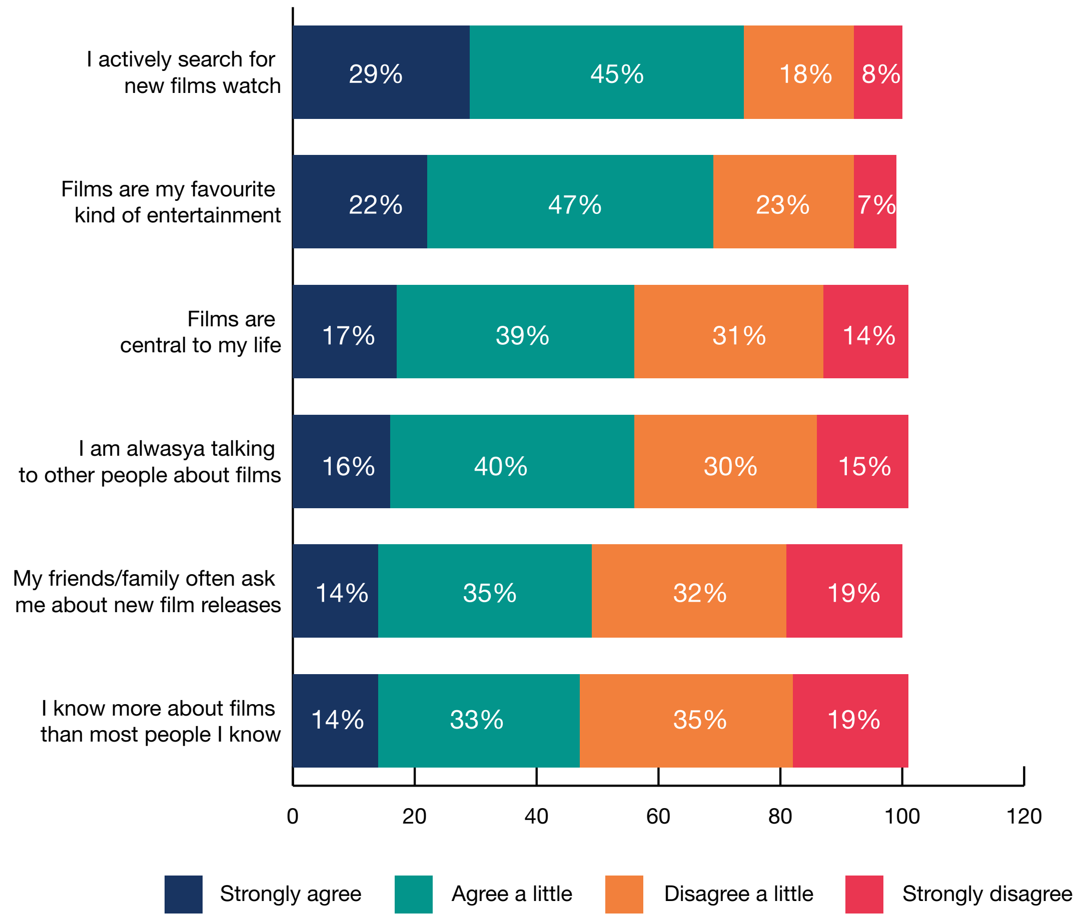
Base: n=5,004 (total sample)

4 The definition of 'shared' was provided as: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in the answer option."*

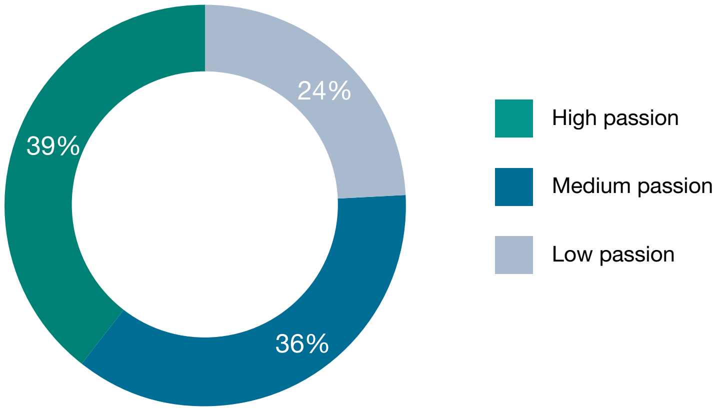
To get a broader sense of **their passion for film,** respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

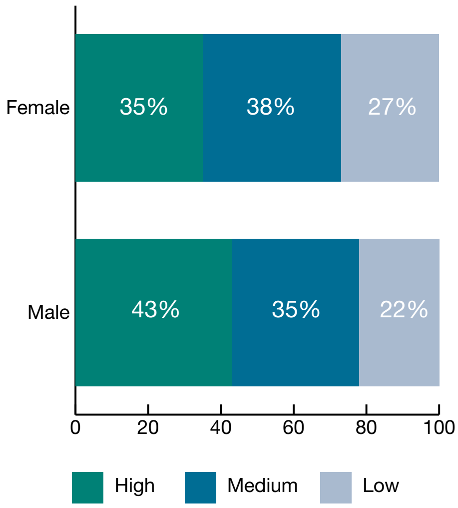
- Four in ten (39%) displayed **high levels of passion for film.** This was most apparent among those aged 35-44 (51%), and among males (which, at 43%, was 8% more than females).
- When looking at individual statements, the **need to discover new films** emerged as a key factor. The most agreed with statement overall (74%) was "I actively search for new films to watch". The preference of films over other forms of entertainment was also important, with 69% agreeing that "Films are my favourite kind of entertainment".

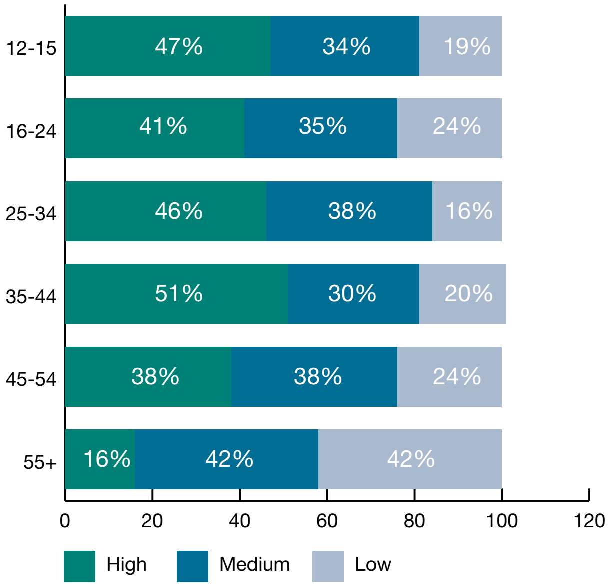
B2. To what extent do you agree or disagree that each of the following statements describe you?



Base: n=2,508 (downloaded, streamed, shared and/or purchased physical copies of films in the past 3 months)







Qualitative insights

In the qualitative phase of the research, films were valued for being a form of **escapism,** which made them particularly valuable to people during lockdown. A couple also mentioned watching films together with friends over Zoom to help them **socialise and bond** with other people during a time of social distancing. However, while for some film consumption **increased** owing to the additional free time that they found themselves having, this was not the case across the board. A few noted that they were simply watching the **same amount as before** because they were still working and their routine had not changed or because they would often watch films in the cinema which was no longer an option available to them. In addition, some noted that due to the absence of new films being produced and released during lockdown, they could not watch the movies they had been expecting to see despite having more time.

- *"They [films] have definitely become more important. After seeing and listening to the devastating news about COVID-19 they helped me to relax my mind."* - Male, 25-34

- *"I think I am probably spending more time searching for movies since lockdown started, because I am spending a lot more time at home due to being furloughed and unable to meet up with friends. I am watching older movies as well as new ones."* - Female, 25-34

- *"The current COVID-19 situation has not had much of an impact on my time or ways allocated to searching for new content online, as I have been working all the way through."* - Female, 25-34

Though many have had more time available to watch films throughout lockdown, the majority seemed to predominantly watch films *in the evening* and *before going to sleep*, in keeping with their film watching habits before lockdown. The reason for this was that most preferred to watch shorter form content during the day and keep longer films to the evening when they had more time to concentrate on one activity for a sustained period of time. However, those who described themselves as **'film fanatics'** and had been furloughed were watching more films during the day as well as watching some back to back at any given time. These respondents were taking the opportunity to watch films at all hours of the day, and were catching up on ones they had always wanted to see but never had enough time for.

- *"I started watching films more often at the beginning of lockdown but lately I've been really into a couple of TV shows which I've been watching during the day. Once lockdown is lifted, I'll probably keep watching the same amount of films as I do this late at night before I go to sleep. My daily routine out of lockdown probably won't influence this too much."* - Female, 16-24

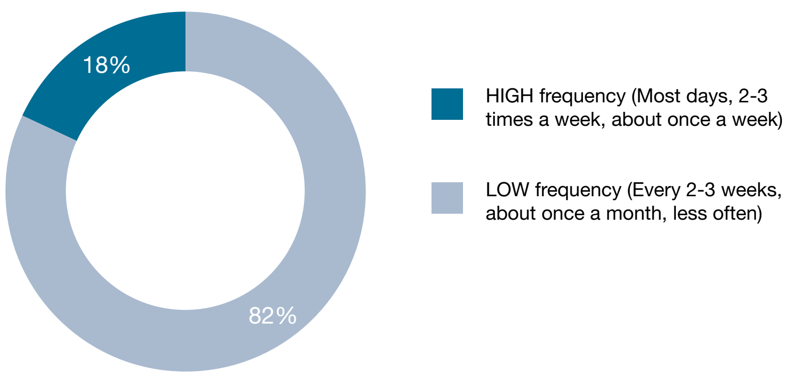
- *"As a single person living alone, I watch movies when I have my day off. I'm a film fan. It helps killing time, yes definitely, for instance on a rainy boring day watching The Lord of the Rings is effective as it is 3 hours long. After that you can start cooking something, that takes another hour or so then relax, watch another movie and so on. It helps break up the routine."* - Male, 25-34

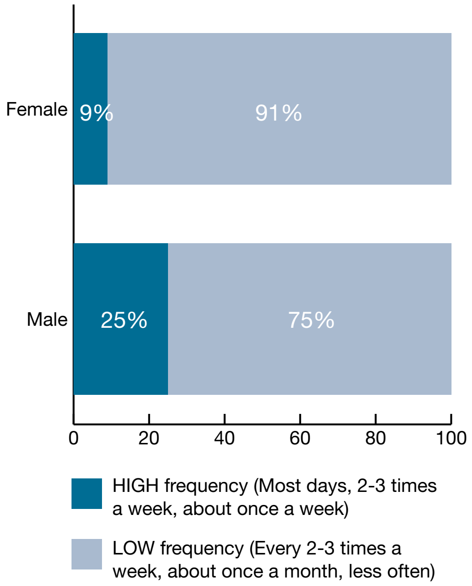
Physical purchasing of film

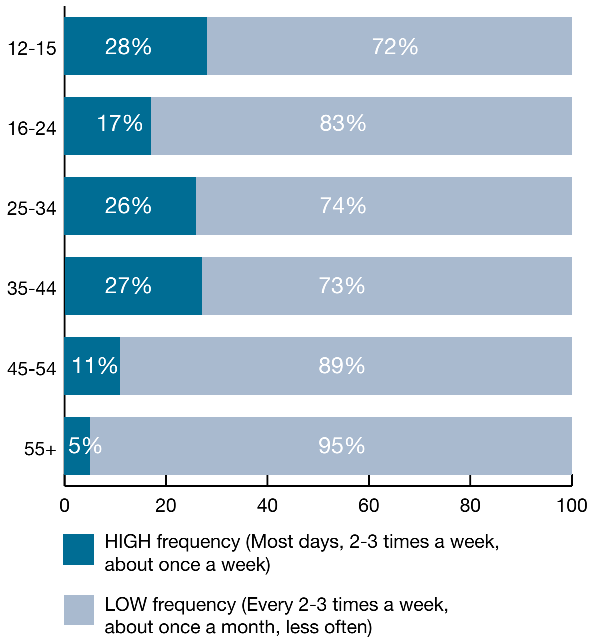
The 13% of respondents who had purchased films in physical formats, such as DVDs or Blu-rays, during the previous 3 months were asked more questions around frequency and number of purchases made.

- Only a minority (18%) of these were **frequent purchasers** of films in physical formats.
- Consumption of physical items since COVID-19 was unchanged for six in ten (60%). The remainder were evenly split between those who purchased more and less.
    - Before COVID-19, respondents had purchased, on average, 8 items every three months.
    - During the previous three months, the average amount they had purchased was unchanged at 8 items.
- Interestingly, males were, compared to females, more likely to make physical purchases frequently and in larger amounts. The same was generally also true of those aged 12-44 compared with those aged 45+.

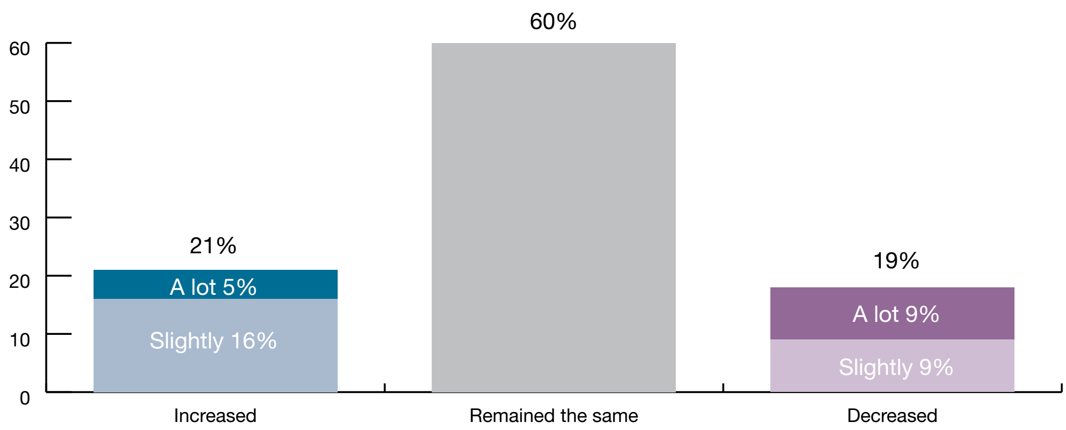
B3. Generally, how often do you purchase physical films (on DVD, Blu-Ray etc.)?





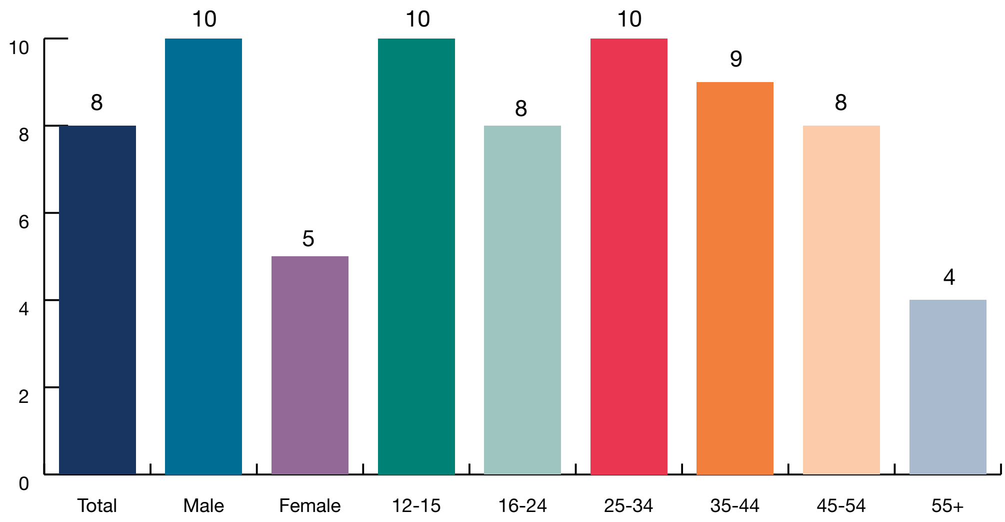


B4. Since the coronavirus (COVID-19) outbreak, would you say the number of physical film products you purchase has?

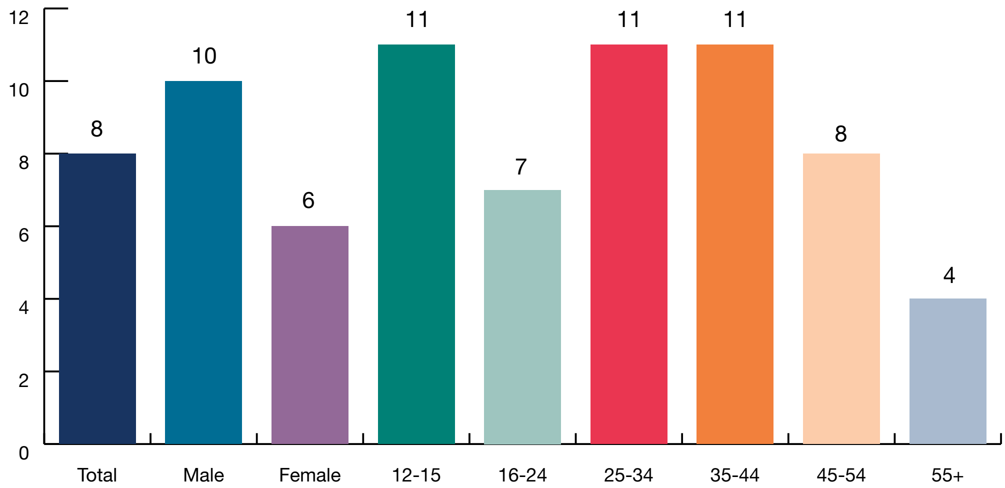


Base: n=642 (purchased physical copies of film in the past 3 months)

B5. Before the coronavirus outbreak, how many physical film products would you say you used to purchase in that same 3 month time period?



B6. In the past 3 months how many physical film products (DVDs, Blu-Rays etc.) did you purchase? (Average purchases)



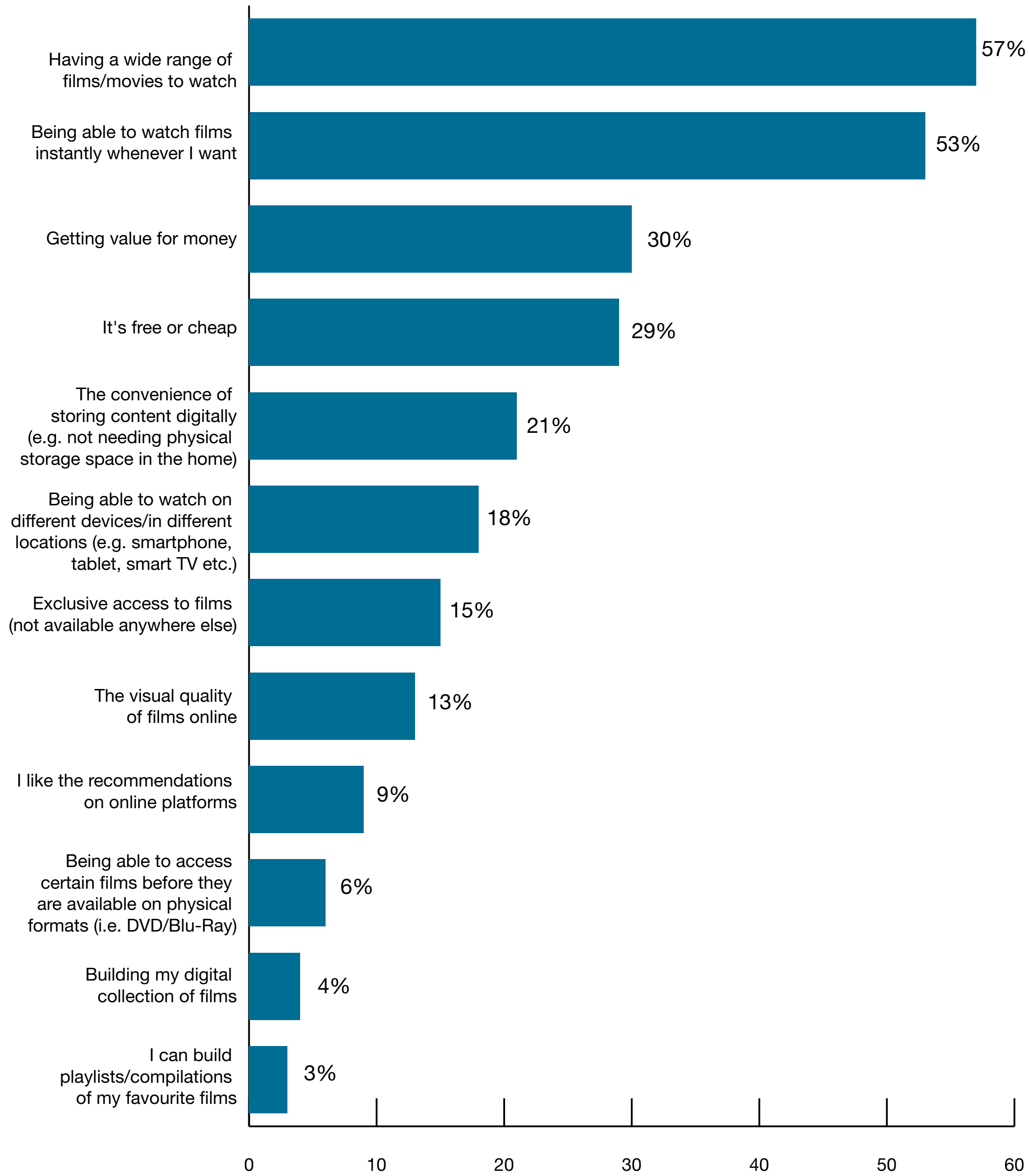
Base: n=534-536 (purchased physical copies of films in the past 3 months)

Understanding online consumption of film

To better understand the drivers of online consumption, those who had streamed or downloaded films in the previous 3 months were asked to select their top three reasons for accessing films online.

- Only two reasons were selected by half or more respondents. These related to the **range of options** available ("having a wide range of films/movies to watch" 57%) and the **ease of access** ("being able to watch films instantly whenever I want" 53%). These top two reasons were consistently selected across gender and age groups.
- The next most dominant theme related to **price**, with over a quarter stating that they access films online because they are "value for money" (30%) or are "free or cheap" (29%).
- Other factors that were mentioned by approximately a fifth were the "**convenience** of storing content digitally" (21%) the **portability** of content, in terms of devices and locations (18%).

B7. What are the main reasons that you choose to access film online (i.e. downloading or streaming)? Please select your top 3. (%)



Base: n=2,286 (downloaded or streamed films online in the past 3 months)

Male respondents	Female respondents
1. Having a wide range of films / movies to watch (53%) 2. Being able to watch films instantly whenever I want (50%) 3. Getting value for money (32%)	1. Having a wide range of films / movies to watch (61%) 2. Being able to watch films instantly whenever I want (56%) 3. Getting value for money (29%)
Aged 12-15	**Aged 16-24**
1. Being able to watch films instantly whenever I want (53%) 2. Having a wide range of films / movies to watch (53%) 3. It's free or cheap (27%)	1. Having a wide range of films / movies to watch (58%) 2. Being able to watch films instantly whenever I want (51%) 3. Getting value for money (28%)
Aged 25-34	**Aged 35-44**
1. Having a wide range of films / movies to watch (58%) 2. Being able to watch films instantly whenever I want (49%) 3. Getting value for money (31%)	1. Having a wide range of films / movies to watch (55%) 2. Being able to watch films instantly whenever I want (52%) 3. Getting value for money (34%)
Aged 45-54	**Aged 55+**
1. Having a wide range of films / movies to watch (59%) 2. Being able to watch films instantly whenever I want (58%) 3. Getting value for money (32%)	1. Having a wide range of films / movies to watch (57%) 2. Being able to watch films instantly whenever I want (56%) 3. It's free or cheap (41%)

Qualitative insights

In the Online Community, **very few** professed to buying **physical copies** of films such as on DVD or Blu-ray. The availability of thousands of films online had marked a shift away from physical copies and towards online access for most several years ago. However, though not a physical product as such, **cinema** had remained an **important offline** means of watching film for many. Roughly a third of those in the category were regular cinema goers prior to the lockdown imposed by COVID-19. In fact, many of these reported to be **looking for more films online** in the absence of being able to go to the cinema, either via their subscriptions or, if the films they had planned to see in the cinema didn't appear on the paid for streaming sites, via non-official sources.

Beyond this, there was **little to no change** in the formats people were purchasing either before or during the lockdown, with the majority almost always watching films online.

- *"I would say I am probably searching for more older movies online now as we are unable to go to the cinema to watch new releases."* - Female, 16-24

- *"Things have definitely changed a little in my film viewing habits because recently I have been renting more films online as opposed to going to the cinema"* - Male, 35-44

In terms of ways of accessing content online, only a few respondents in the qualitative phase tended to download films. For those who did, the benefits were said to be the assurance of being able to watch a film **uninterrupted** without potential connection and buffering issues as well as the preferred the sense of owning a copy of a film (stated by one respondent). While some other respondents did mention occasionally having downloaded a film, they often said they did not download out of habit as it seemed **like too much effort** and took up **too much space on their hard drive**.

- *"I'd prefer to stream if all I want to do is watch the film - which is the case for most films - but if I know the film is one I'll want to rewatch, or if I want to use bits to create a fanvid or gifs, or watch offline then I'd download."* - Female, 25-34

- *"I generally don't watch the movies again for a year or two so it's unnecessary storage to download. And this has not changed in lockdown."* - Female, 25-34

Streaming films was by far the **most common method** of access owing mostly to the fact that the majority were signed up to **at least one streaming service**. As most reported having no wifi connection issues in their homes, streaming was seen as a straightforward and smooth process, especially during lockdown where most were spending the majority of their time at home.

- *"It's easier to simply click and watch rather than fiddling around waiting for things to download"* - Male, 25-34

- *"I much prefer streaming to downloading because you don't have to worry about storage space for all the films you want to watch. With streaming you can just close the web page when the movie is finished and never think about it again."* - Female, 25-34

Downloading film

The 18% who had downloaded films during the previous 3 months were asked more questions around frequency, volume and sources used.

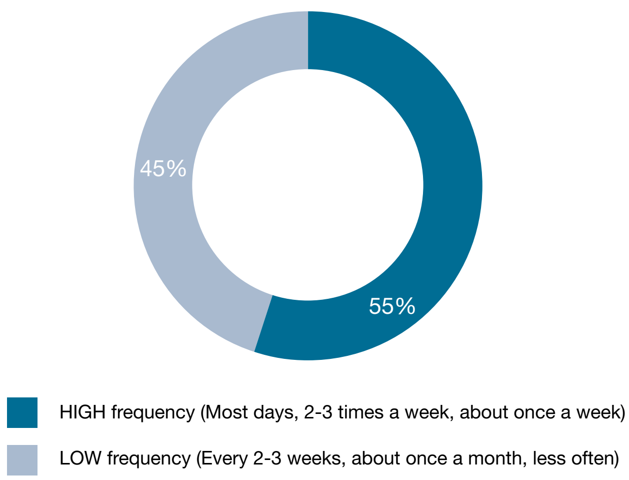
Frequency and volume of downloading film

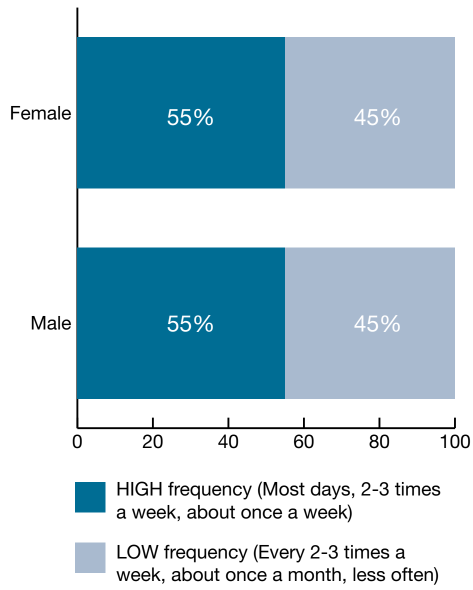
- Over half (55%) of those who downloaded films did so frequently (that is at least once a week). The proportion downloading weekly was **fairly consistent across ages**, although slightly lower for the oldest two groups (47% among those aged 45-54 and 46% among the 55+).

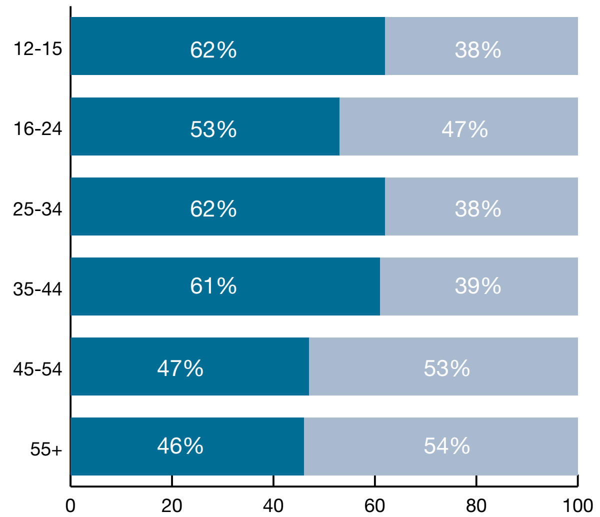
- The number of films downloaded since COVID-19 had increased for approximately half (46%) of respondents. It was unchanged for marginally more (49%) respondents, with very few (5%) saying it had decreased.
    - Before COVID-19, respondents had downloaded, on average, 17 films every three months.
    - During the previous three months the amount they had downloaded had increased to, on average, 23 films.

- While those aged 12-44 were marginally more engaged, downloading was broadly evenly distributed among age groups in terms of both the frequency and volume of films downloaded.

B8. Generally, how often do you download (full-length) films through the internet? (%)

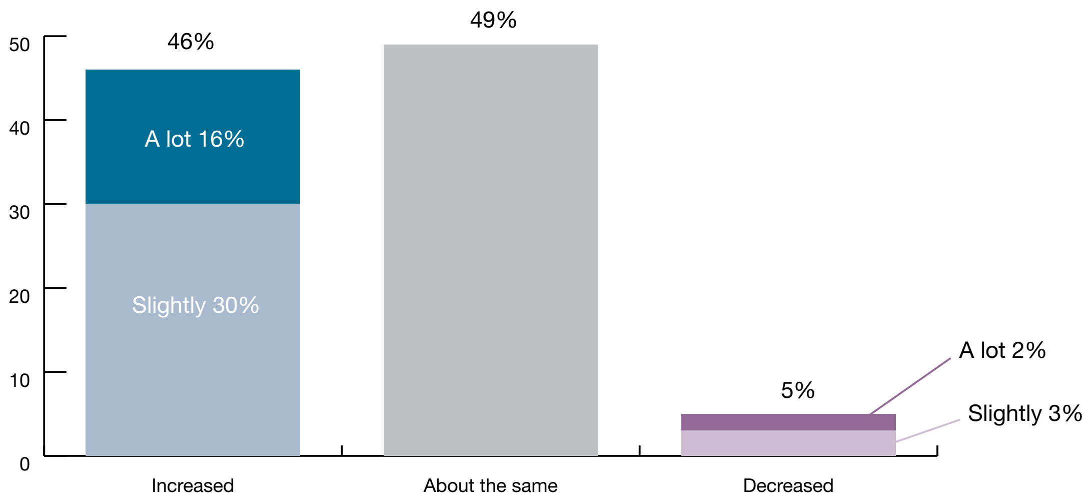






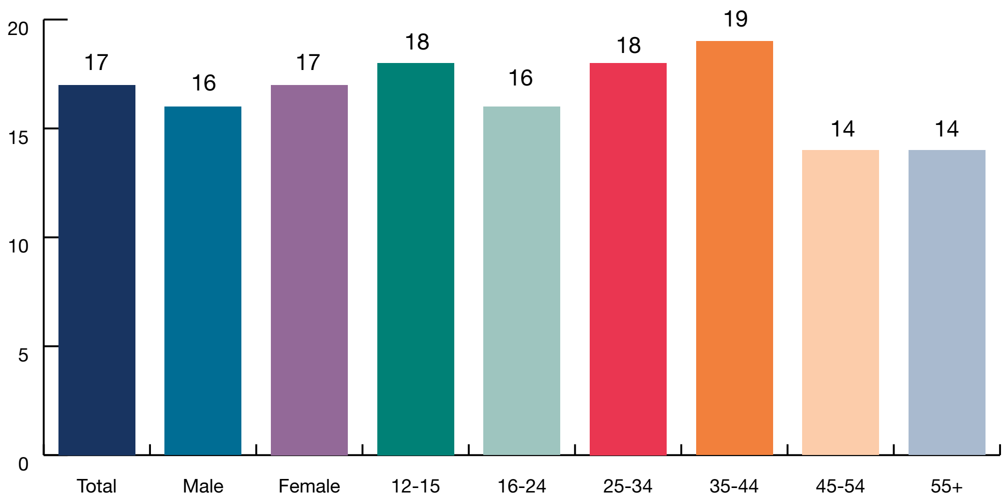
Base: n=931 (downloaded films in the past 3 months)

B9. Since the coronavirus (COVID-19) outbreak, would you say the number of films/movies you are downloading has?

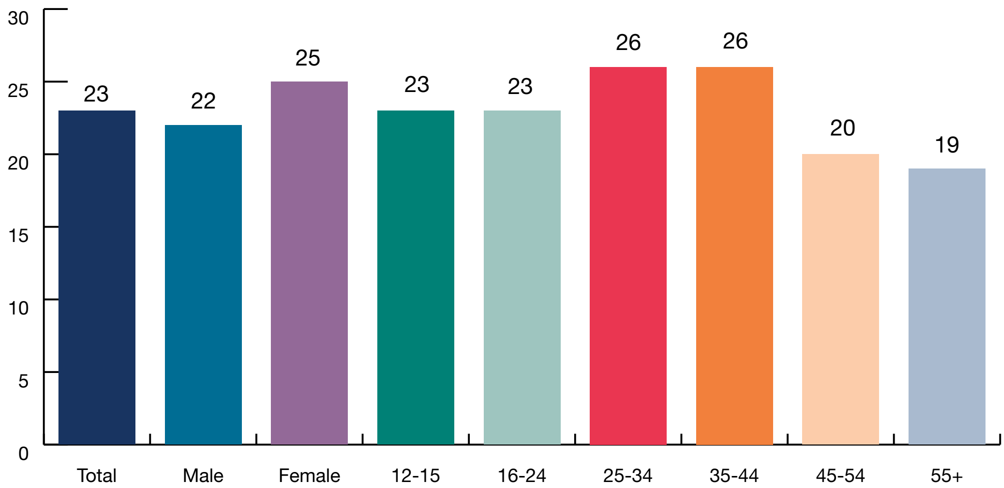


Base: n=931

B10. Before the coronavirus outbreak, how many films/movies would you say you used to download in that same 3 month time period?



B11. In the past 3 months how many full-length films did you download through the internet? (average number of downloads)



Base: n=887-923 (downloaded films in the past 3 months)

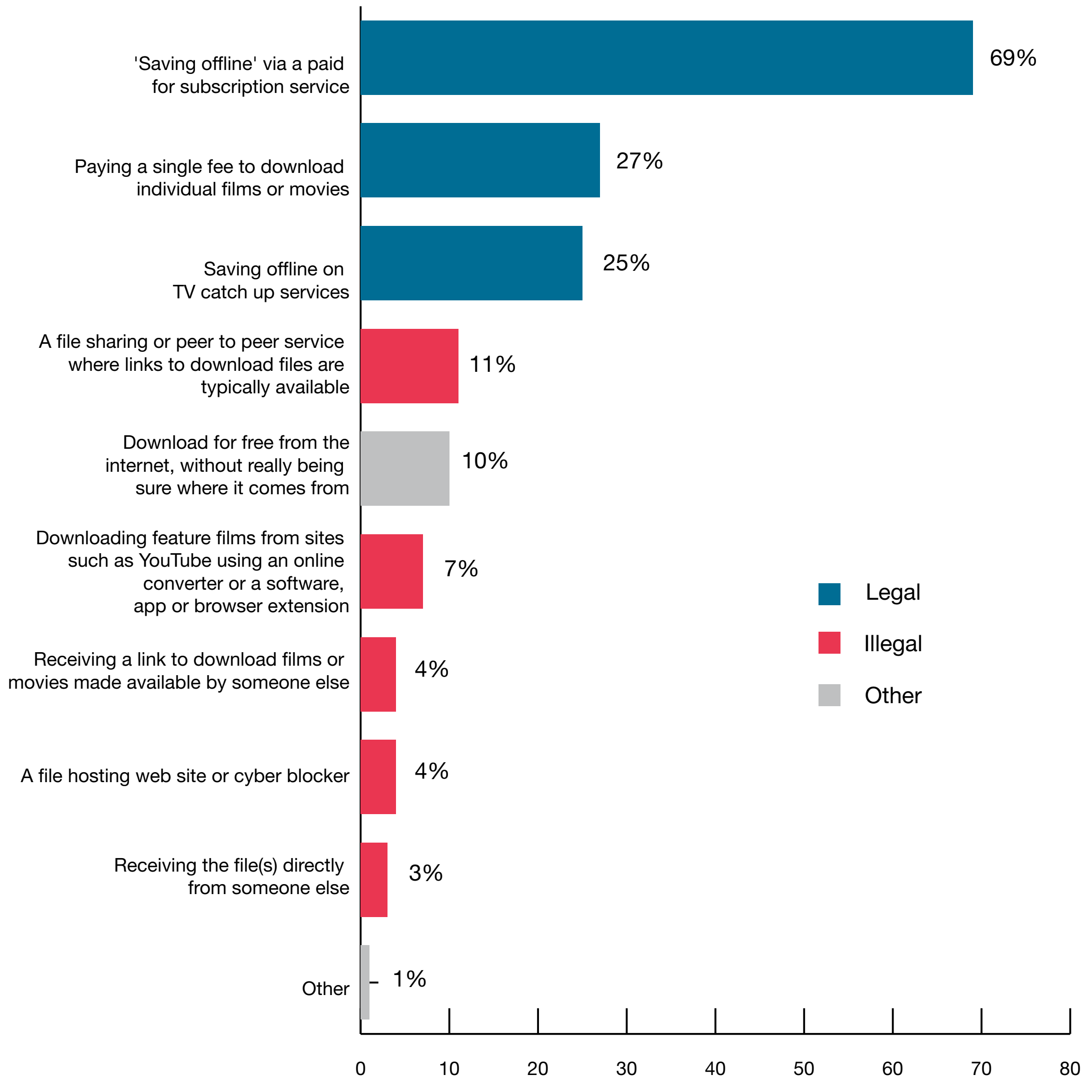
Sources of downloading films

Respondents were shown a list that encompassed the different ways (legal and illegal) in which they could download films. An 'unknown' option was provided to serve as a catch-all for those who were unsure of the exact source.

- **The most commonly used sources were legal.** The most common, by a large margin, was "saving offline on a paid subscription service", undertaken by approximately two thirds (69%) of all film downloaders. This was followed by around a quarter who were "paying a single fee to download individual full-length films or movies" (27%) and/or "saving offline on TV catch-up services" (25%).

- The most commonly used illegal method was using **BitTorrent or another file-sharing peer to peer service** (11%). Other than this, no illegal method was selected by more than 7%.

B12. Which of the following have you used to download films in the past 3 months? (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
'Saving offline' via a paid for subscription service	66%	73%	77%	76%	72%	70%	60%	59%
Paying a single fee to download individual films or movies	29%	25%	23%	25%	29%	35%	30%	20%
Saving offline on TV catch-up services	22%	30%	24%	19%	23%	24%	24%	37%
A file-sharing or peer to peer service where links to download files are typically available	14%	5%	6%	5%	12%	15%	13%	11%
Download for free from the internet, without really being sure where it comes from	10%	11%	13%	15%	8%	6%	8%	15%
Downloading feature films from sites such as YouTube using an online converter or a software, app or browser extension	8%	7%	7%	10%	7%	8%	5%	7%
Receiving a link to download films or movies made available by someone else	4%	3%	5%	3%	3%	4%	5%	4%
A file hosting website or cyberlocker	4%	3%	7%	4%	6%	3%	2%	1%
Receiving the file(s) directly from someone else	3%	3%	5%	2%	3%	4%	4%	1%
Other	1%	2%	2%	1%	1%	3%	1%	2%

Base: n=913 (downloaded films during the past 3 months)

Download for free from the internet, without really being sure where it comes from

Those unsure of the source of their film downloads were asked, i**n a new question this wave**, to explain more about how they obtained them in their own words.

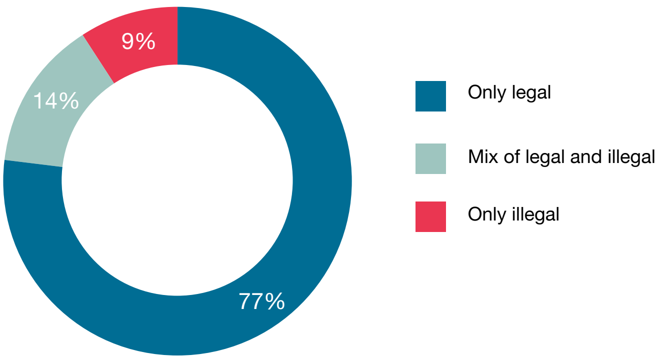
Most respondents searched online (Google was most frequently mentioned) and would click through the results until they found a suitable download link. Some would choose a link without really knowing the source, while others were more discerning and would be careful in their selection in an attempt to avoid viruses. Asking someone to download it for them was the next most common method.

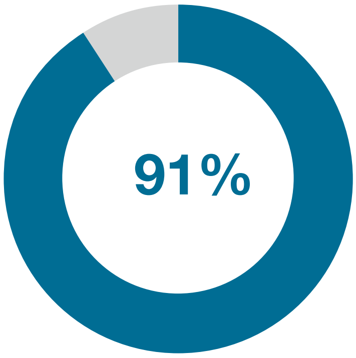
Legality of film downloads

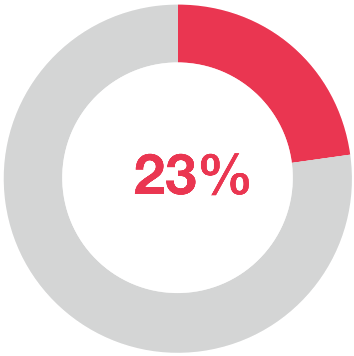
To better understand the distribution of sources across legal and illegal categories, those who had downloaded films in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

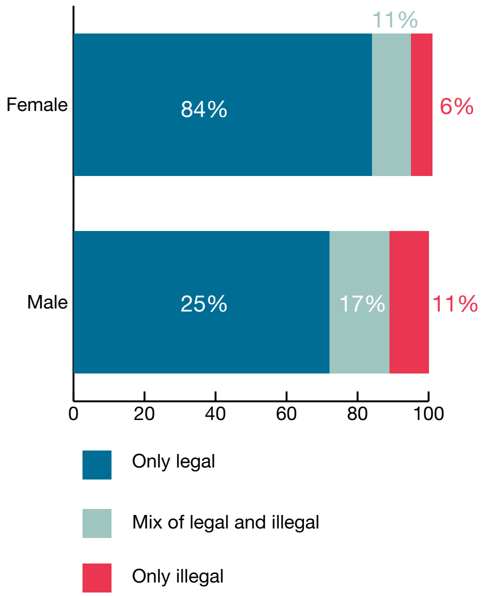
The answer option "download for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they **only** consumed content this way was not included in the base.

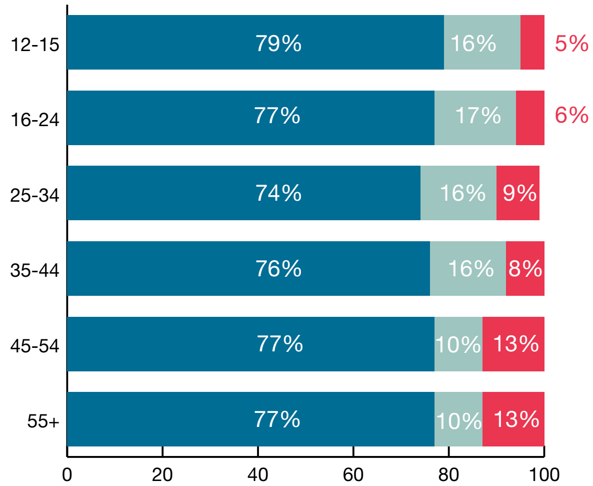
- Legal Sources:
  - Overall, 91% had used at least one legal source to download films.
  - Those aged 12-15 were most likely (95%) to have used at least one legal source.
  - The highest proportion (77%), by some way, had used legal sources only.
- Illegal Sources:
  - 23% had used at least one illegal source to download films.
  - 9% had used illegal sources only to download films.
- Mixed:
  - 14% had used a mix of legal and illegal sources.
  - Use of a mix of legal and illegal sources was slightly higher among those aged 12-44 (where it ranged from 16-17% for all age groups)

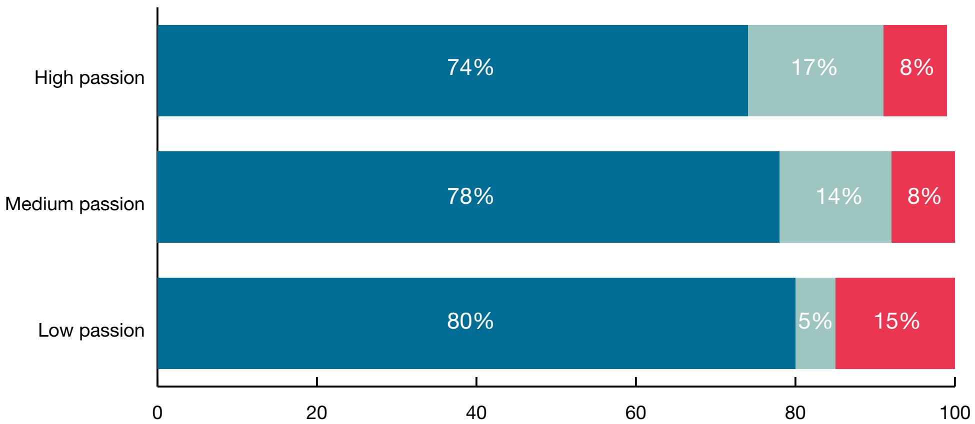












B13. And how is the way you download films typically split across the following sources?

Legality	Source	Average % of usage split	Average number of downloads
Legal	'Saving offline' via a paid for subscription service	54%	14
	Paying a single fee to download individual films or movies	15%	3
	Saving offline on TV Catch-up services	10%	2
Illegal	A file-sharing or peer to peer service where links to download files are typically available	6%	1
	Downloading feature films from sites such as YouTube using an online converter or a software, app or browser extension	3%	1
	Receiving a link to download films or movies made available by someone else	1%	0
	A file hosting website or cyberlocker	1%	1
	Receiving the file(s) directly from someone else	1%	0
Other	Download for free from the internet, without really being sure where it comes from	6%	1
	Other	1%	0

Base: n=893 (downloaded films in the past 3 months)

Qualitative insights

In terms of illegal downloads, this was mostly **Torrent based** and motivated by a **lack of accessibility to** certain films via legal methods. Almost all of those who downloaded illegally did pay for at least one form of subscription either to an online streaming service or TV subscriptions such as Sky Movies and so downloading illegally was only used to **supplement their other paid methods**. A few mentioned that they preferred downloading films illegally rather than streaming them illegally. They felt that their trusted go-to Torrent sites were safer than illegal streaming sites.

- *"The most recent film I enjoyed was JoJo Rabbit and I downloaded it through a site I found by searching on my browser. I don't stream from free sites usually because of a bad experience I had after having clicked on a link once. There is often also an increase in scam adverts and spam email traffic."* - Female, 55+
- *"I don't trust many sources to be free of malware/viruses etc. so I only want the file from people where I have some idea of who they are."* - Female, 25-34

The lockdown imposed by COVID-19 did not appear to have much impact on the **rate at which films were downloaded illegally** by most respondents. A few reported an increase owing to watching more film content generally, and, as such, using this method more as well as other legal sources.

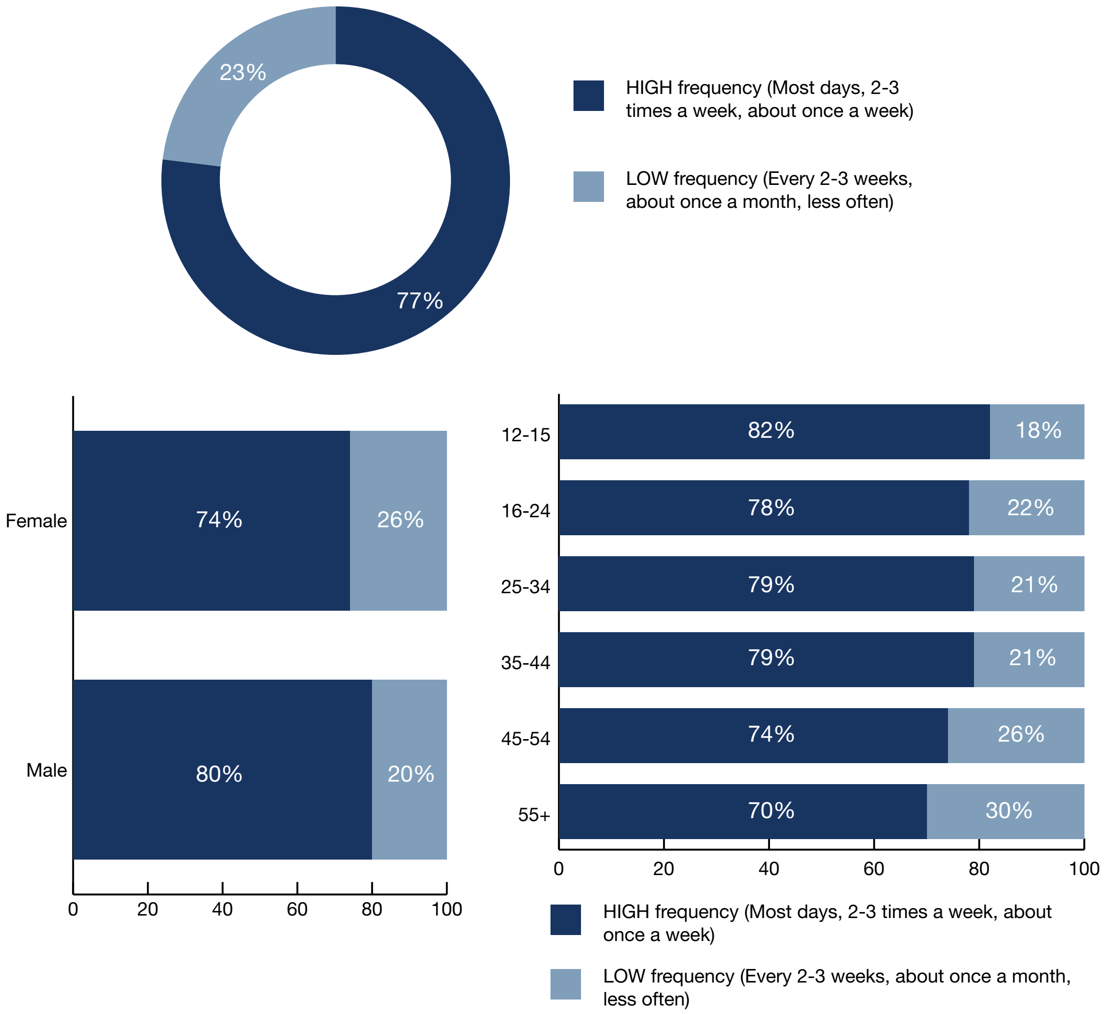
Streaming film

The 42% who had streamed films during the previous 3 months were asked questions around frequency, volume and sources used.

Frequency and volume of streaming film

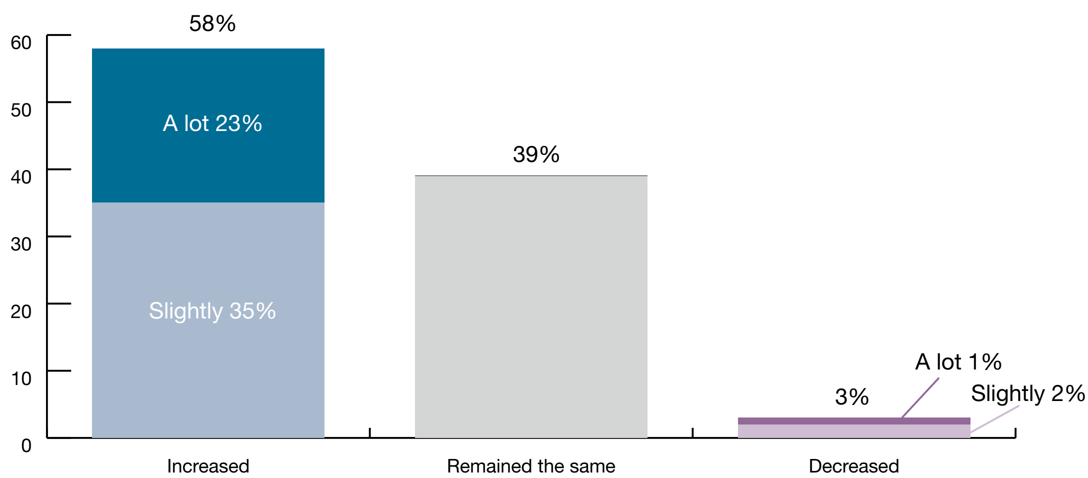
- **Approximately three quarters (77%) of these were frequent streamers of films**, doing so weekly. This was notably higher than the proportion who were frequent downloaders of films within the same time period (55%).
- The number of films streamed since COVID-19 had increased for over half (58%) of respondents. Approximately four in ten (39%) said the amount of music they had streamed hadn't changed, with very few (3%) saying it had decreased.
    - Before COVID-19 respondents had streamed, on average, 54 hours of films every three months.
    - During the past three months, however, the number of hours spent streaming films had risen, quite substantially, to an average of 84 hours.
    - The number of hours spent streaming increased for all age groups although this was largest for those aged 12-15 (41 hours more than before COVID-19) and 16-24 (37 hours).
- Interestingly, frequency of streaming was generally consistent among all age groups.

B14. Generally, how often do you stream full-length films through the internet? (%)



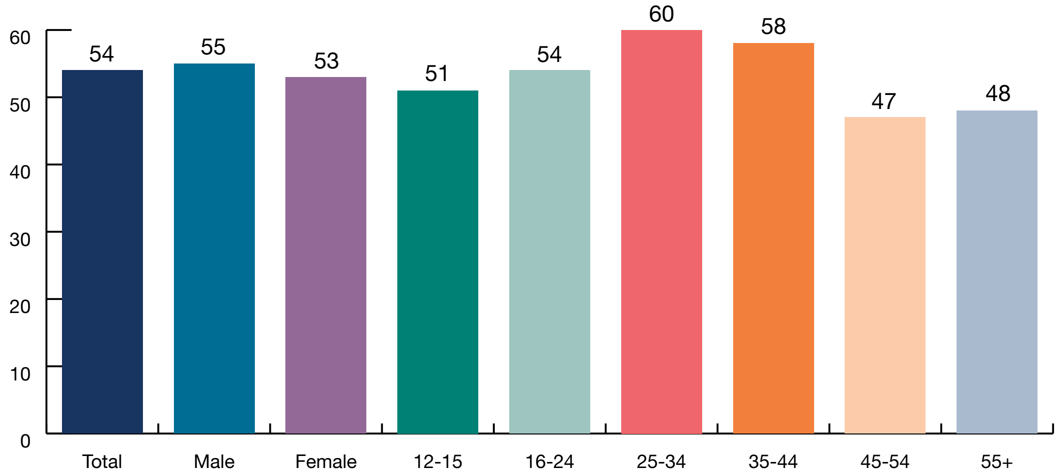
Base: n=2,107 (streamed full-length films in the past 3 months)

B15. Since the coronavirus (COVID-19) outbreak, would you say the number of hours you spend streaming films/movies has?

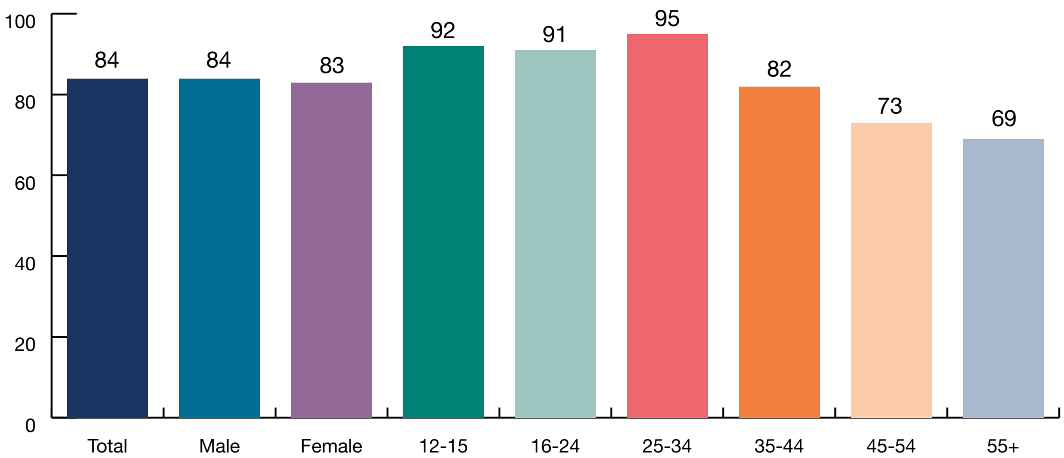


Base: n=2,107 (streamed full-length films in the past 3 months)

B16. Before the coronavirus outbreak, how many hours would you spend streaming films/movies in that same 3 month time period?



B17. In the past 3 months how many hours did you spend streaming full-length films through the internet? (Average number of hours)



Base: n=2,019-2,076 (streamed films in the past 3 months)

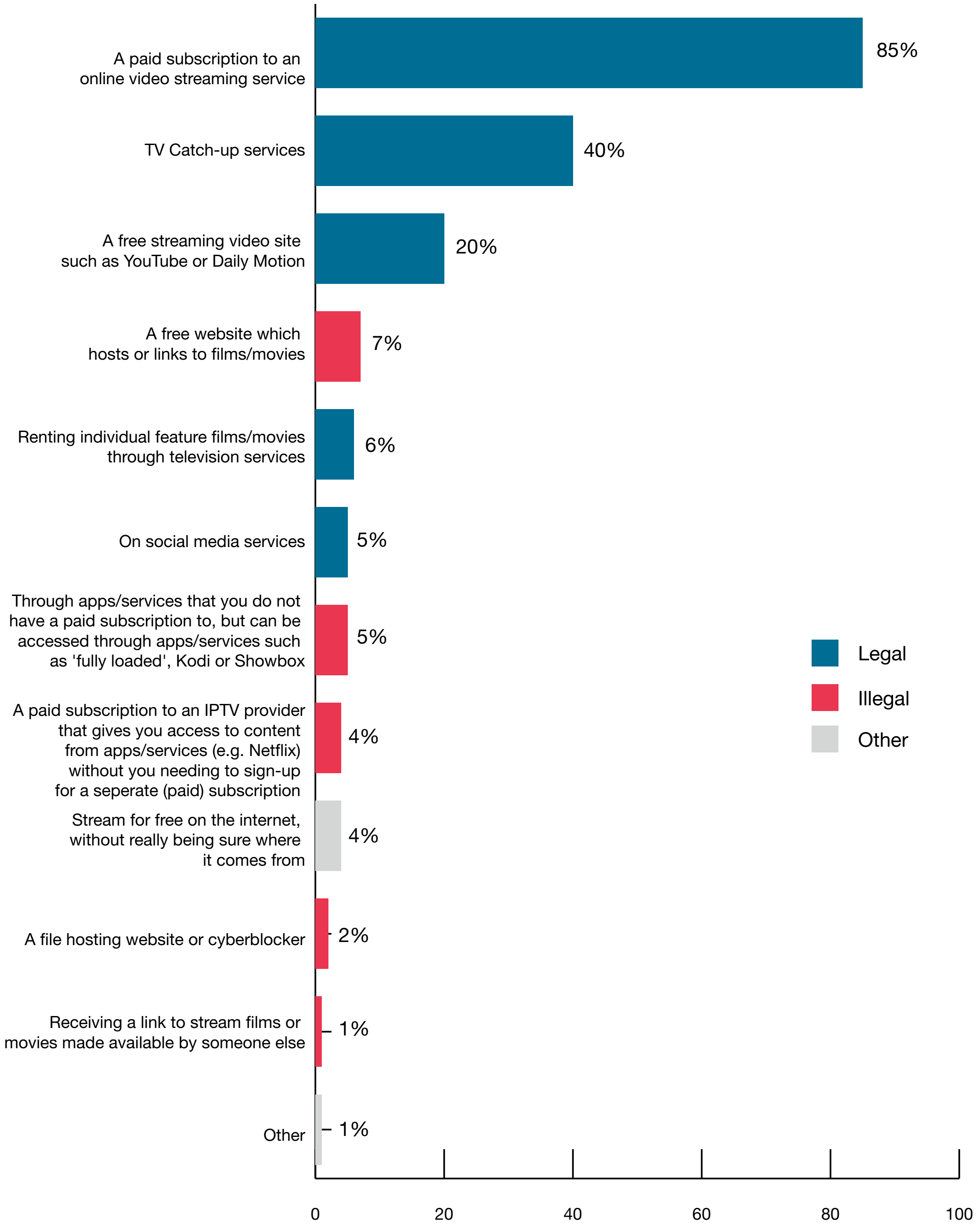
Sources of film streaming

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could stream films. An 'unknown' option was provided to serve as a catch-all for those who were unsure of the exact source.

- **Encouragingly, legal sources were the most used.** Furthermore, the top option, by some way, was a paid source: **85% used a "paid subscription to an online video streaming service"**. This was followed by "TV Catch-up services" (40%) and "a free streaming video site such as YouTube" (20%).

- **No single illegal source was used by more than 7%** of film streamers. Of these, free websites hosting links to films (7%) and Kodi style boxes (5%) were the most common. There were few differences across age groups, although 16-24 year olds were more likely to have used free websites hosting links to films (11%).

B18. Which of the following have you used to stream full-length films in the past 3 months? Please select all that apply? (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
A paid subscription to an online video streaming service	84%	87%	89%	91%	90%	85%	84%	74%
TV catch-up services	40%	40%	32%	33%	35%	38%	46%	54%
A free streaming video site such as YouTube or Daily Motion	23%	18%	19%	24%	18%	19%	19%	23%
A free website which hosts or links to films/movies	7%	6%	7%	11%	8%	6%	5%	4%
Renting individual feature films/movies through television services	7%	6%	9%	5%	6%	7%	6%	6%
On social media services	6%	3%	8%	5%	5%	5%	3%	3%
Through apps/services that you do not have a paid subscription to, but can be accessed through apps/services such as 'fully-loaded', Kodi or Showbox	5%	4%	6%	3%	4%	5%	6%	5%
A paid subscription to an IPTV provider that gives you access to content from apps/services (e.g. Netflix) without you needing to sign-up for a separate (paid) subscription	5%	4%	5%	3%	5%	6%	5%	2%
Stream for free on the internet, without really being sure where it comes from	4%	3%	6%	5%	3%	2%	1%	4%
A file hosting website or cyberlocker	2%	2%	4%	1%	3%	2%	1%	0%
Receiving a link to stream films or movies made available by someone else	1%	1%	2%	2%	1%	0%	2%	1%
Other	0%	1%	0%	0%	1%	1%	1%	1%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=2,107 (streamed films in the past 3 months)

Stream for free on the internet, without really being sure where it comes from

Those unsure of the source of their film streams were asked, *in a new question this wave*, to explain more in their own words about how they obtained them.

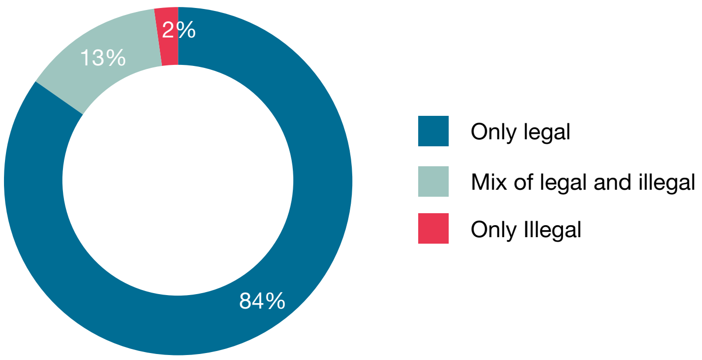
A Google search was also the most common way to stream a movie (for example by typing movie name + "free"). Most respondents engaged in a similarly exploratory process for finding streaming sources - as with sourcing films to download - and their comments suggest that it is seen as a relatively easy process. Some mentioned that they found out about sources/websites through word-of-mouth from friends/family.

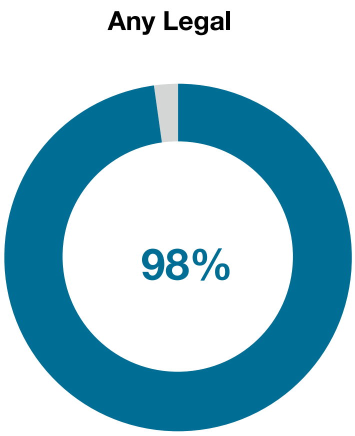
Legality of film streaming

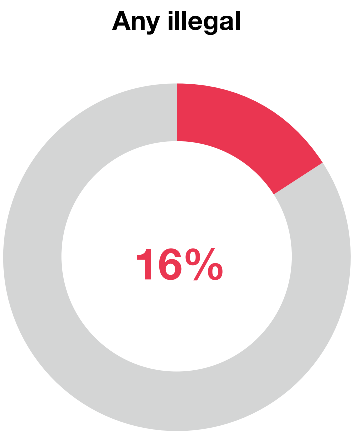
To better understand the distribution of sources across legal and illegal categories, those who had streamed films in the previous 3 months were grouped into the following (mutually exclusive) categories: using only legal sources, only illegal sources or a mix of the two.

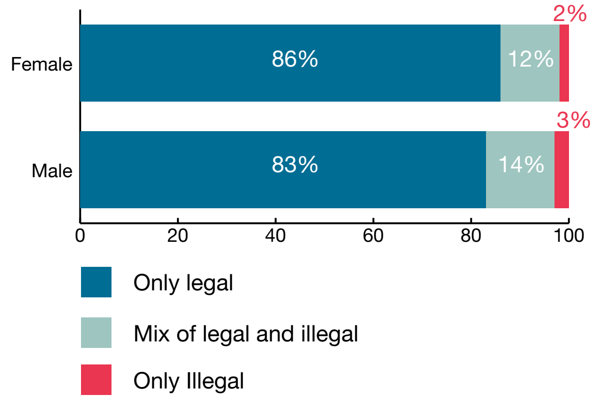
The answer option "stream for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

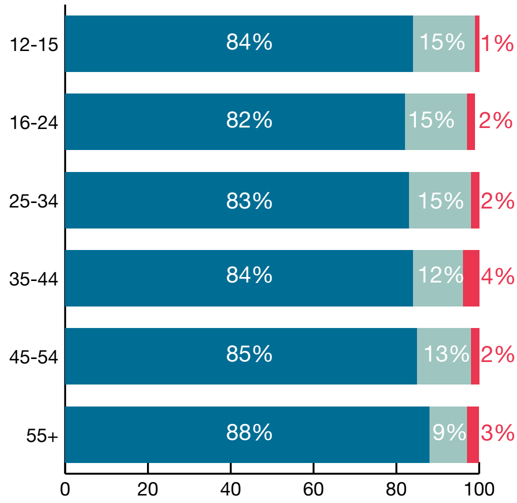
- Legal:
  - 98% had used a legal source to stream films.
  - 84% had used legal sources only to stream films.
- Illegal:
  - 2% had used only illegal sources to stream films.
  - 16% had used an illegal source to stream films.
- Mixed:
  - 13% used a mix of legal and illegal sources to stream films.

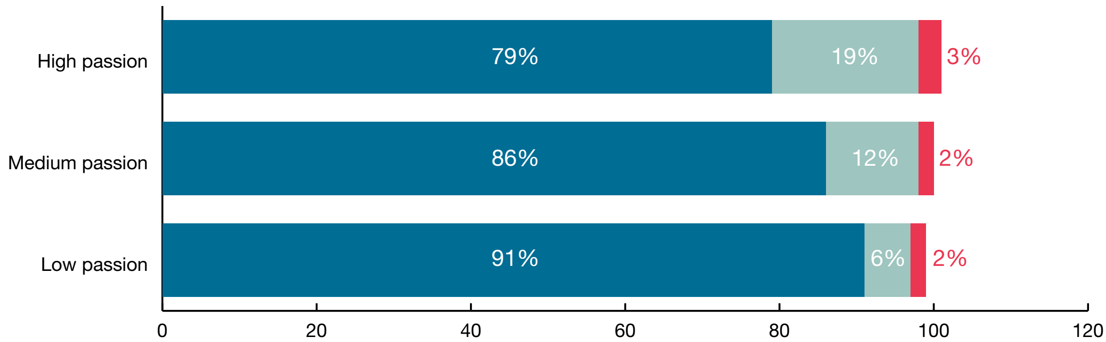












Base: n=2,087 (streamed films in the past 3 months, with those who selected 'other' or 'not sure of source' removed)

B19. And how is the way you streamed films typically split across the following sources?

Legality	Source	Average % of usage split	Average number of hours
Legal	A paid subscription to an online video streaming service	70%	62
	TV catch-up services	14%	9
	A free streaming video site such as YouTube or Daily Motion	6%	5
	Renting individual feature films/movies through television services	1%	1
	On social media services	1%	1
Illegal	A free website which hosts or links to films/movies	2%	2
	A paid subscription to an IPTV provider that gives you access to content from apps/services (for example. Netflix) without you needing to sign-up for a separate (paid) subscription	2%	2
	Through apps/services that you do not have a paid subscription to, but can be accessed through apps/services such as 'fully-loaded', Kodi or Showbox	1%	1
	A file hosting website or cyberlocker	0%	0
	Receiving a link to stream films or movies made available by someone else	0%	0

Legality	Source	Average % of usage split	Average number of hours
Other	Stream for free on the internet, without really being sure where it comes from	2%	1
	Other	0%	0

Base: n=2,107 (streamed films in the past 3 months)

Qualitative insights

Illegally streaming a film was seen as both an **easier and faster process** than illegally downloading, which takes time. The main reason for illegally streaming films, much like for illegally downloading films, was if a film **was not available on an existing subscription.** Many respondents mentioned not wanting to pay a one-off fee or to sign up to another platform simply for one film and therefore chose to seek out such films for free.

- *"Though free streaming sites can be slightly annoying because there are a lot of pop-ups and ads coming up, it's easy and you can get films available in HD quality. I do use this option quite often as not all films that are on my watchlist appear on Netflix or Amazon Prime."* - Male, 25-34

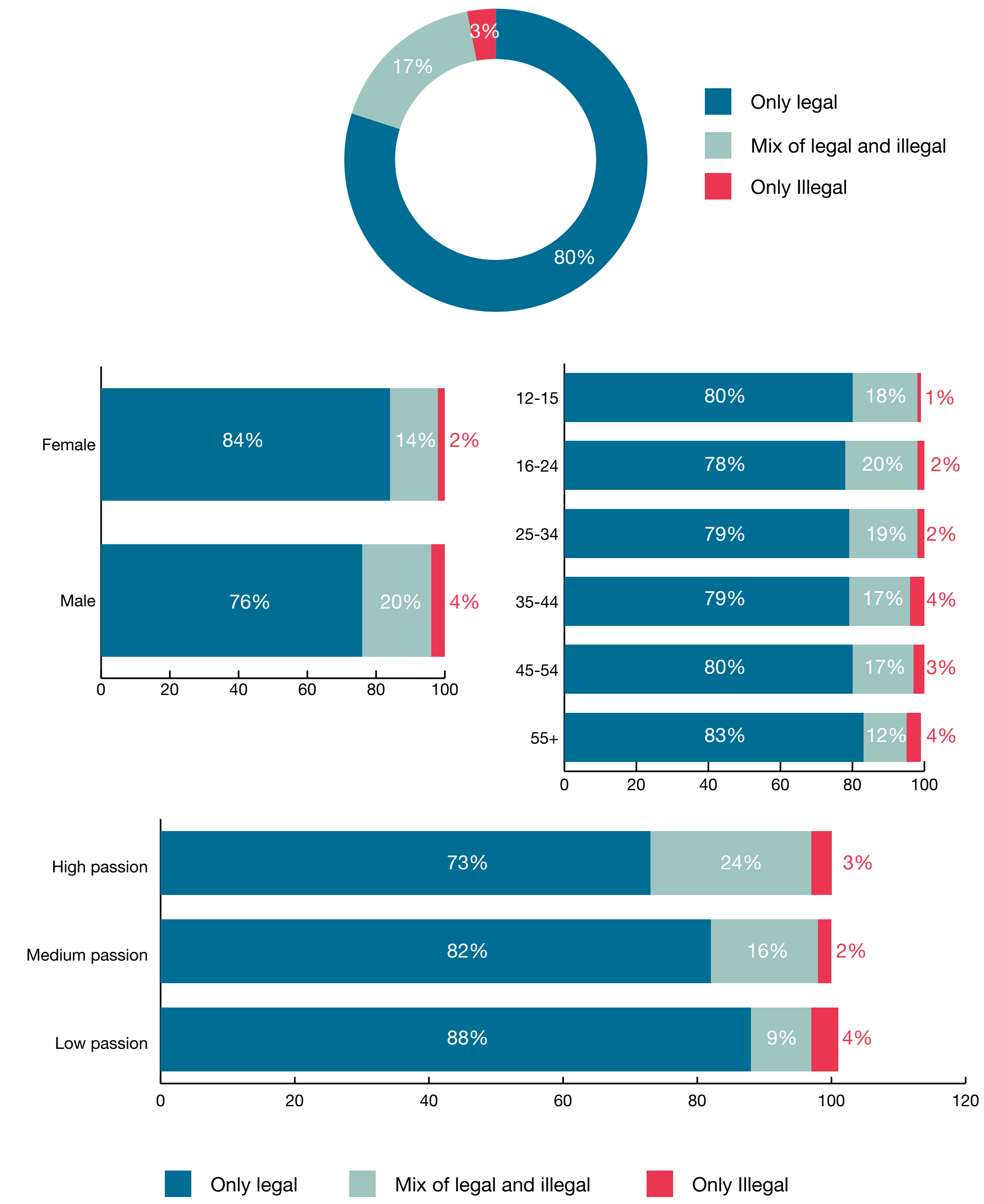
During lockdown, as most respondents reported a gentle **increase in their film viewing**, their use of illegal streaming sites **increased accordingly,** however, legal methods (mainly subscriptions) remained the main form of access. One respondent even mentioned subscribing to two more platforms when lockdown was announced in order to ensure they had enough content to watch.

- *"I noticed about myself that in general I am searching for new films online more regularly than before. Before, I was busy constantly working, doing loads of hours a month. Since the lockdown happened, things around us have started slowing down which allowed me immensely to watch, rewatch and look for either new movies or movies I haven't seen before."* - Male, 25-34

Combined downloading and streaming of film

The use of legal and illegal sources for film access (that is for both downloading and streaming) were combined to allow us to look at the category as a whole.

- Only Legal:
  - **Eight in ten (80%)** consumed films online using only legal sources.
  - This was consistent across all age groups where it ranged from 78% to 83%.
- Only Illegal:
  - 3% used illegal sources only to consume films online.
- Mixed:
  - 17% used a mix of legal and illegal sources to consume films online.
  - This was more common among those with a 'high' passion for films (24%, which was 8% higher than those with a 'medium' passion and 15% more than those with a 'low' passion).



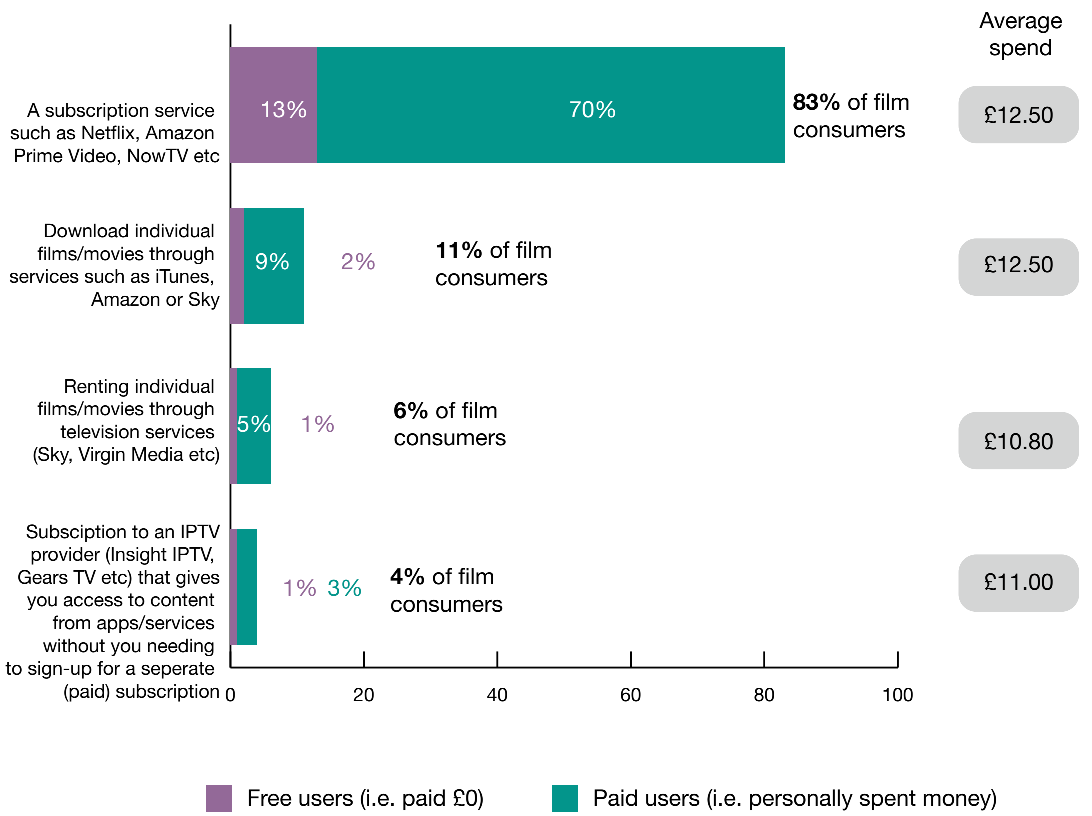
Base: n=2,253 (streamed and/or downloaded films from a legal or illegal source, with those who only selected 'not sure of source' or 'other' removed)

Paying for film

In a new question this wave, those who had used a paid source to either download or stream films were asked how much they had personally spent on each source.

- Eight in ten (83%) of film consumers had used **a paid subscription service** (e.g. Netflix) in the previous three months. Most of these (70% of film consumers) had personally paid to do so in the past month. They spent, on average, £12.50 each month.
- The other two legal means of streaming or downloading films ("download individual films through services such as iTunes" or "renting individual films/movies though television services") were used by 11% and 6% of the sample respectively in the previous three months. They paid, on average, between approximately £10-12 each month for each of those.
- A relatively small proportion (4%) had a paid subscription to an IPTV provider. The amount they paid each month was similar to that spent, on average, on each of the legal sources (£11).

B20. Approximately how much do you personally spend each month on the below sources of streaming or downloading films/movies?

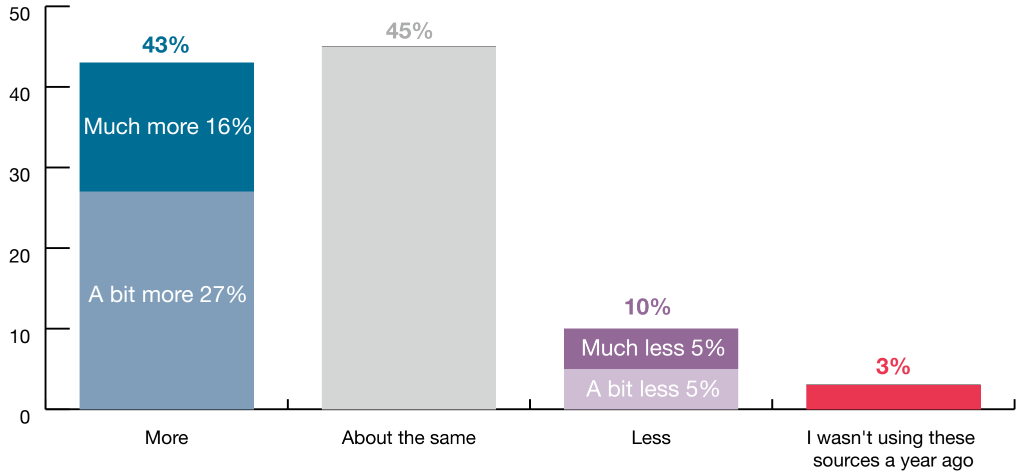


Change in use of illegal sources

In a new question this wave, those who had used an illegal source to download or stream films were asked how the use of these sources compares to the same point a year ago.

- Respondents were fairly evenly split between those whose usage had remained the same (45%) and those whose had increased (43%). A relatively small number said their usage had decreased (10%) or that they weren't using these sources a year ago (3%).

B21. Compared with the same point a year ago, would you say you are using those illegal sources...



Those whose usage of illegal sources had changed since the previous year were asked a follow up open text question about the reasons for this change.

Those who were using these sources **more** than they were a year ago highlighted that increased time at home resulted in increased usage of illegal sources for accessing movies. The overwhelming majority of respondents cited this as the main reason for their increased usage.

The main other reasons related to convenience and the wide range of movies available through illegal methods. Compared to what they perceived to be available, streaming services such as Netflix and Amazon Prime were considered to have a much more limited selection.

- *"They are convenient, cost effective and time saving, and quick and reliable"* - Male, 25-34
- *"There are a lot more movies available from new releases to classics"* - Male, 55+
- *"For the variety and greater choice of films we like."* **-** Female, 45-54
- *"There's not much else to do at the moment."* - Female, 35-44
- *"I'm being paid to stay at home 24 hours a day, 7 days a week. All I do is watch movies, TV shows, play video games and eat."* - Male, 35-44
- *"They have a wider range of films, and include outdated films, which are usually hard to find on paid services for example Netflix. Also, it is hard to find films I haven't watched on paid services. So, it is better to find new films I haven't watched through other sources."* - Male, 16-24

Those who were using these sources **less** than they were a year ago highlighted that the decision to subscribe to a streaming service such as Netflix or Amazon Prime resulted in a lesser need to use illegal sources. A few also noted that streaming platforms, including BBC iPlayer, seemed to have higher quality content than previously.

Some respondents also cited drawbacks of illegal methods. These included a fear of digital viruses from illegal sources, lower video quality, and difficulty finding the right content. Though a minority, a few mentioned that they were simply watching fewer films compared to a year ago – the COVID-19 pandemic was given as a reason for this.

- *"I'm worried about the source, hackers, Cyber-crime etc."* - Female, 55+
- *"I have seen more interesting content available on the BBC website than before (I am not sure if the BBC increased its content or if I just noticed it more)"* - Female, 25-34
- *"I have Netflix and Amazon Prime now which I didn't a year ago"* - Male, 25-34
- *"[Illegal sources] can be difficult to access."* - Male, 35-44
- *"The content quality can be poor"* - Male, 55+
- *"It's getting more difficult to find good quality video of film online due to more tight copyright control on several hosting sites. Also, I now can afford to pay so it seems more ethical to support an industry I like"* - Male, 25-34
- *"Watching films or movies was a way to make me go to sleep or as background after a long day of work whereas now I am reading and exercising more instead"* - Female, 25-34

The small number of respondents who had **started using** illegal sources since the same point last year highlighted that they were drawn to the sources in search of a specific film, or after tiring of the films available on streaming platforms. In conjunction with this, a few mentioned that, with the increased free time provided by the lockdown, they have exhausted their preferred streaming platform's selection, leading to them trying out new sources.

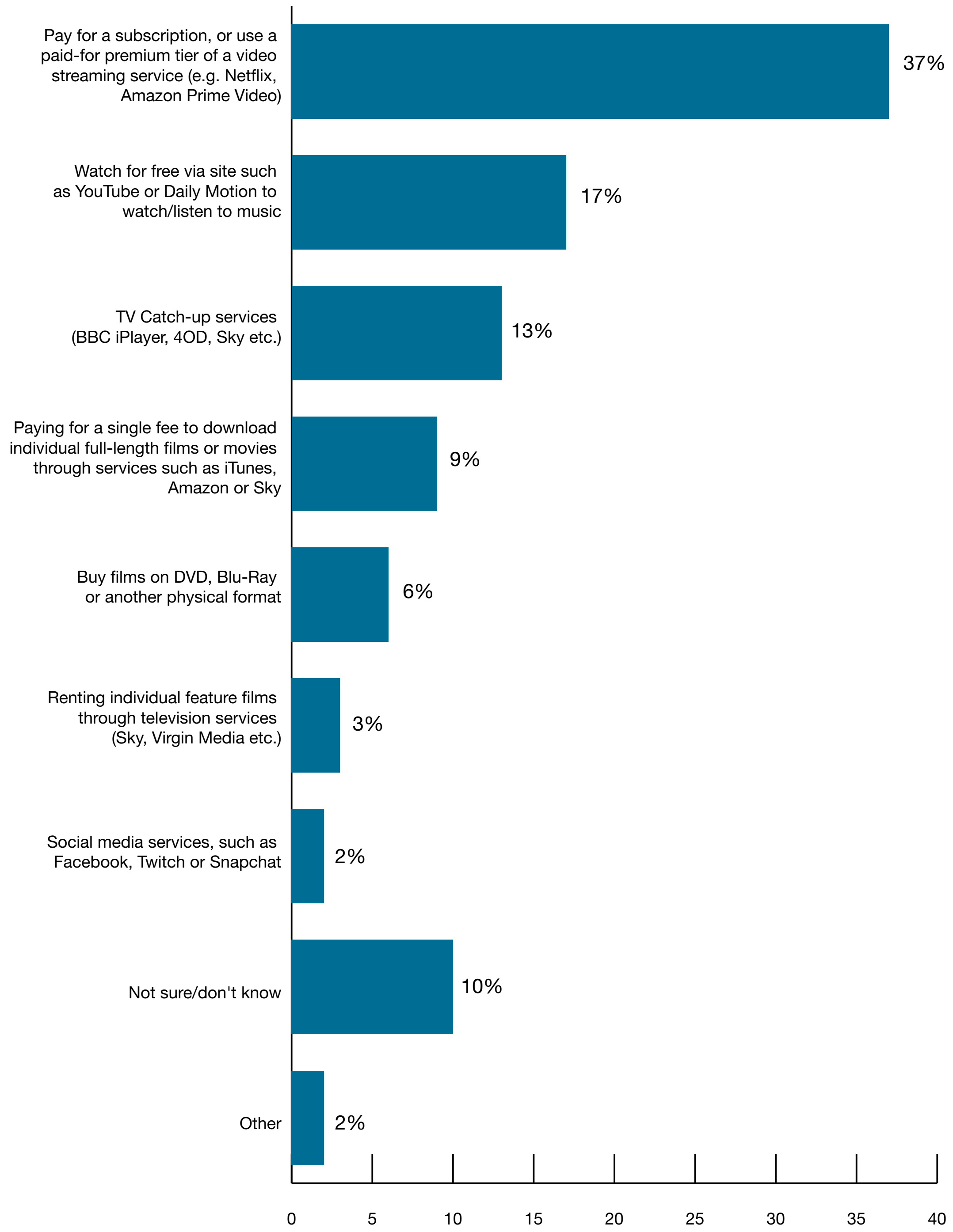
- *"Because Netflix doesn't have all the films in the world."* - Male, 16-24
- *"There's nothing to watch on Netflix, I've seen it all and with nothing to do I had to find something."* - Male, 25-34

Alternatives to infringement

Those who had used illegal sources to either download or stream films were asked which *single* legal source they would use if they could no longer access them illegally.

- Overall, the **most commonly chosen option was a paid one**, with over a third (37%) saying that they would "pay for a subscription or use a paid for premium tier of a video streaming service".
- Interestingly, no other single option was selected by more than 17%, with 10% indicating that they were not sure what they would do. There did, however, appear to be a slight preference for free options; "Watch for free via sites such as YouTube" and "TV catch-up services" were selected by 17% and 13% respectively.

B22. If films were no longer available to download or stream via these illegal sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
Pay for a subscription to, or use a paid-for premium tier of a video streaming service (e.g. Netflix, Amazon Prime Video)	37%	37%	43%	46%	33%	39%	29%	33%
Watch for free via site such as YouTube or Daily Motion to watch/listen to music	18%	16%	13%	20%	17%	15%	18%	18%
TV catch-up services (BBC iPlayer, 4OD, Sky etc.)	11%	17%	10%	7%	12%	17%	11%	25%
Paying a single fee to download individual full-length films or movies through services such as iTunes, Amazon or Sky	9%	11%	5%	8%	10%	14%	11%	4%
Buy films on DVD, Blu-Ray or another physical format	8%	4%	5%	6%	5%	5%	12%	5%
Renting individual feature films through television services (Sky, Virgin Media etc.)	3%	3%	10%	1%	6%	0%	4%	0%
Social media services, such as Facebook, Twitch or Snapchat	3%	2%	5%	3%	4%	1%	0%	2%
Not sure/don't know	9%	11%	7%	7%	10%	8%	15%	10%
Other	2%	0%	3%	1%	2%	2%	0%	2%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=453 (streamed and/or downloaded films illegally)

Qualitative insights

The majority of respondents felt that it would be **frustrating to lose access** to these methods but that, overall, adapting to only legal methods would not be hard and eventually become habit. Most highlighted that it was only really on the specific occasion that they were not able to find a film on their usual subscriptions that they went looking for free access elsewhere. The infrequency of use of these methods meant that **very few felt that their viewing would decrease** if illegal methods were removed. A few accepted they would simply have to pay an additional fee now and then for films outside of their subscriptions or make do with what was available on the platforms they used.

- *"I would feel a bit sad but to be honest, I use industry approved methods 90% of the time. I would probably consume more older films than right now, as I don't mind paying a subscription for Netflix and Prime, but they don't usually have the newest films. I don't think the amount of time I spend watching films will change, I would keep both my Netflix and Prime subscriptions so I would expect the amount I spend to stay the same."* - Female, 25-34

- *"I might spend a bit more on accessing films online but I think mainly I would just go to the cinema more often as if I am going to pay, I would rather get the full experience out of it."* - Female, 25-34

However, for some there was an overarching sense that individuals should have a **right to free access**. A couple expressed that they would feel upset as moving onto legal platforms only meant they would simply not be able to see a lot of the films they wanted to, as these were often **not available on their chosen subscription or indeed any official sources at all**. Though a couple mentioned that access to free films had become more important than ever during lockdown, the general sense was that free access to films was something which was important out of principle, not just during the particular circumstances of the last few months.

- *"I would like to see more collaboration. I feel at the moment the industry has too many providers and this is driving quality for the consumer down. Sometimes I feel the platforms available churn out anything. Also, I feel premium top ups are a bit unfair to the customer. I am happy to pay for a product but expect value for money."* - Female, 55+

"It would mean a delay to accessing things based on regions. I wouldn't be able to get subtitles on all the things I need them on because industry approved methods don't seem to treat accessibility as a priority. I wouldn't be able to get some films, especially indie ones or older ones because there's a whole period of films which aren't on streaming sites and aren't easy/cheap enough to buy physical copies of. I think it would end up restricting the content I watch to be more mainstream only and also less diverse as a result." - Female, 25-34

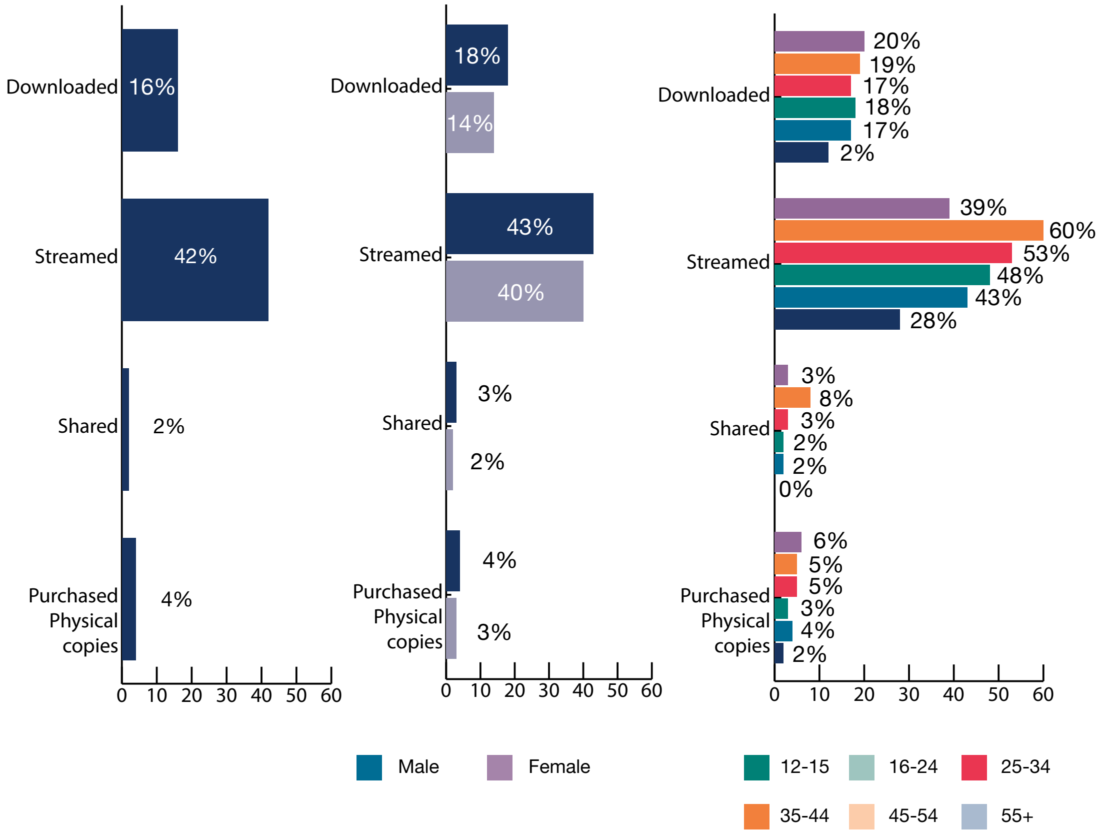
TV programmes/series

Engaging with TV programmes/series

46% had engaged with TV programmes/series in the previous 3 months (i.e. either by downloading, streaming, sharing or purchasing physical copies of TV programmes/series).

- **Streaming was, by some way, the most common method of accessing TV programmes/series**, with 42% having done so. It was even higher among those aged 16-34 when compared to older or younger age groups.
- The proportion who had **downloaded TV programmes/series** followed by some way at 16%, with just 4% having purchased physical copies.

Q. Have you downloaded/streamed/shared[5]/purchased physical copies of TV Programmes/Series in the past 3 months?



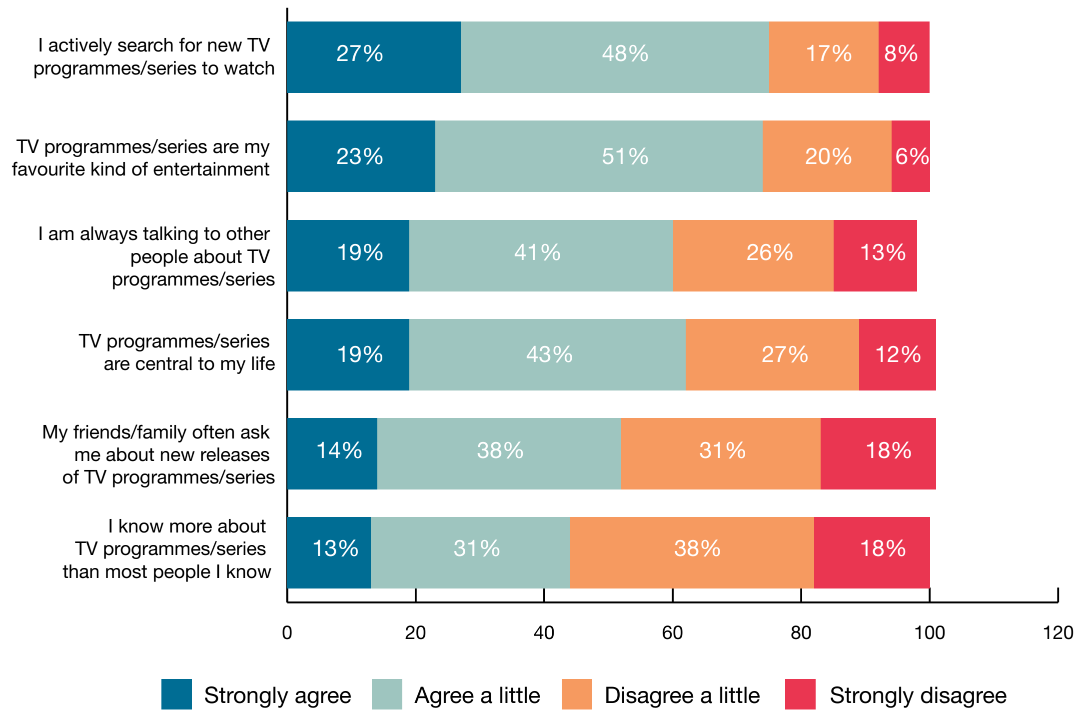
Base: n=5,004 (total sample)

5 The definition of 'shared' was provided as: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in the answer option."*

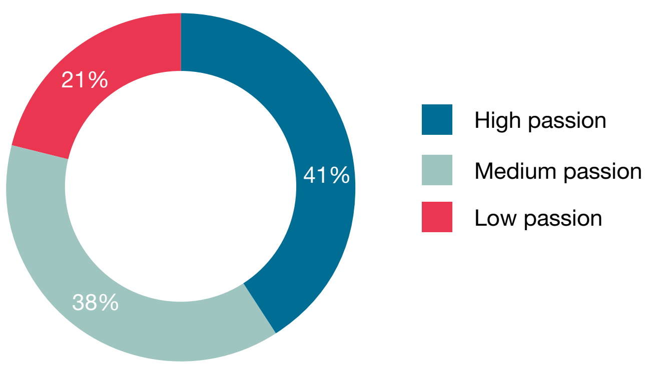
To get a broader sense of **their passion for TV programmes/series**, respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

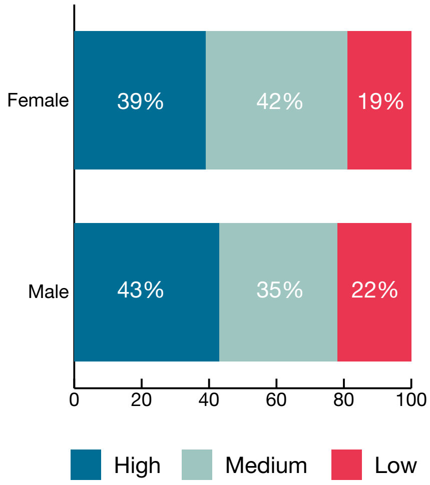
- Four in ten (41%) displayed **high levels of passion for TV programmes/series.** This was most apparent among those aged 25-34 (54%) and tended to steadily decline with age (e.g. 21% of those aged 55+ were in the High category).
- When looking at individual statements, **discovery** emerged as a key factor. The most agreed with statement overall (75%) was "I actively search for new TV programmes/series to watch". This was closely followed by those who agree that "TV programmes/series are my favourite kind of entertainment" (74%).

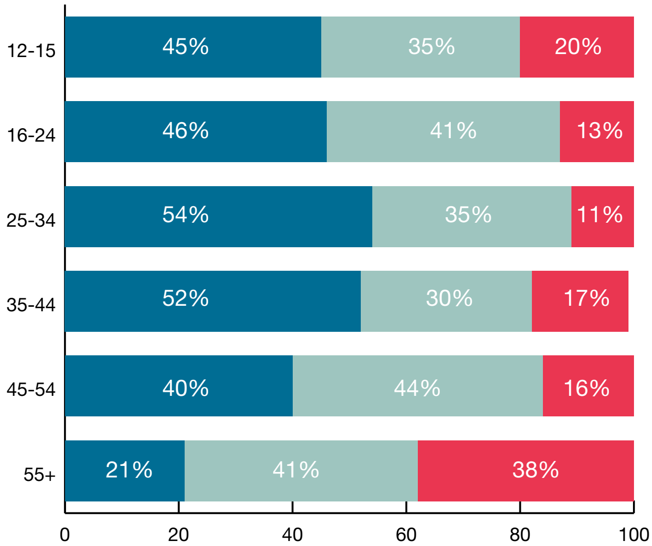
C1. To what extent do you agree or disagree that each of the following statements describe you?



Base: n=2,341 (downloaded, streamed, shared and/or purchased physical copies of TV series in the past 3 months)







Qualitative insights

In the Online Community, TV programmes/series were a popular form of entertainment for a number of reasons. These included the ability of TV programmes/series to facilitate **relaxation and distraction** by taking one's mind off their day, and also **providing company** by playing in the background. Respondents also mentioned that TV programmes/series provided much needed **entertainment** during COVID-19. For many, they also provided structure and **something to aim for** in the absence of their usual work/life activities; following a story across multiple episodes and finishing a season.

- *"TV is where I get most of my entertainment and it has definitely become more important for me since having more free time."* - Female, 16-24

- *"I really want to have finished the series I'm watching by the end of lockdown. It's like a little goal I can aim for."* - Female, 16-24

For these reasons, even with the apparent lack of new TV series noted due to restrictions on filming during lockdown, many said that their **consumption of TV programmes/series had increased**. Respondents mentioned both searching for **new content** as well as **re-watching old series** they had previously enjoyed. Some even spoke about the opportunity they now had to finally watch all the series recommended to them which they previously had never had the time to watch.

- *"I keep a list of shows I watch and have been recommended (definite addiction!) and tend to know what time of the year the new season is likely to be launched. I've not been searching for new content in lockdown as I always have a list longer than my arm."* - Male, 45-54

Due to the short format of most TV programmes making consumption *very easy and digestible*, those who reported having been furloughed said they were **watching notably more TV programmes/series** during lockdown than in the months before. Many said they were watching programmes **throughout the day**, when they would usually have been working, as well as into the evenings and bedtime. Those still working reported that nothing much had changed in their watching routine, which was mostly concentrated towards the evenings as before lockdown.

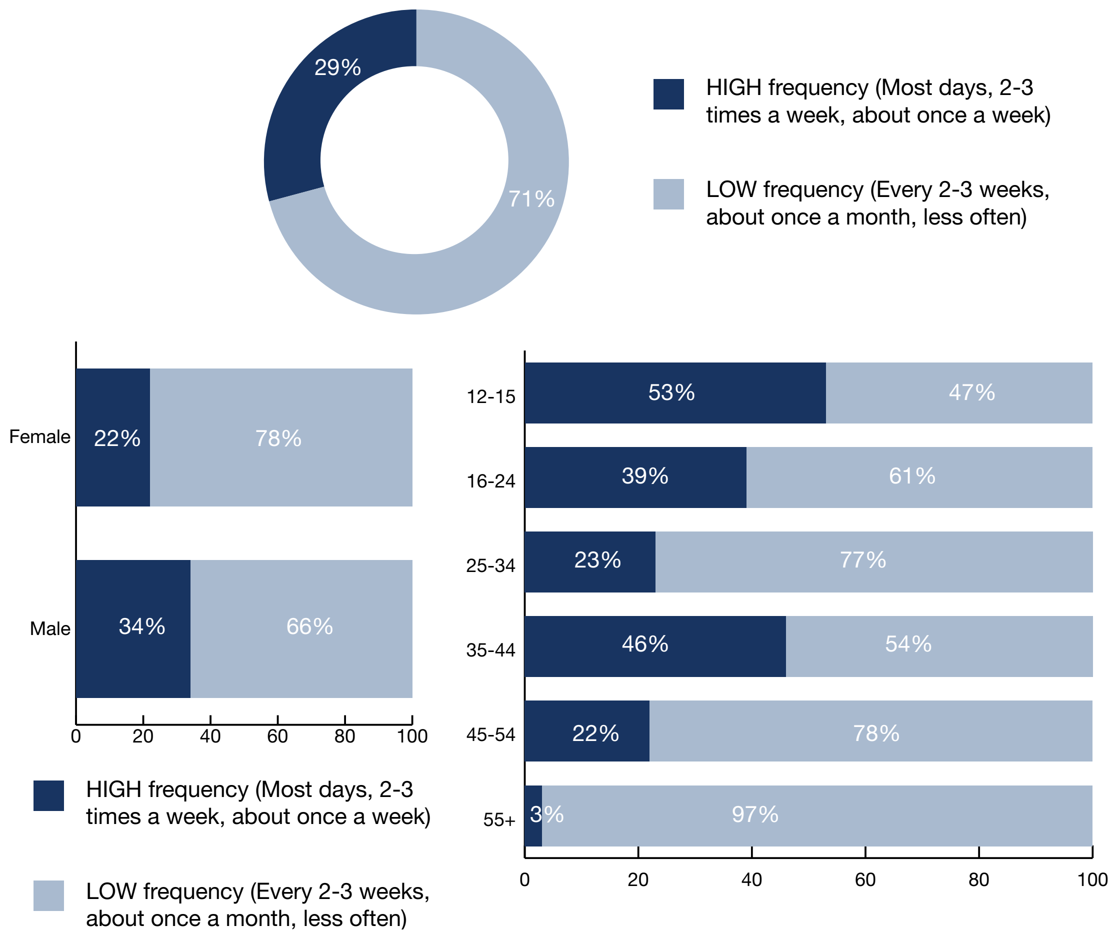
- *"Before lockdown a typical day would've been going to college and revising when at home, so I only really watched TV at night, whereas now I have a lot of free time. I watch at almost all hours of the day, sometimes with my mum. I think you can watch so many because it's individual short episodes rather than one long* *episode like a movie which makes it better to watch, like even though it takes up the same amount of time, it's more broken down."* - Female, 16-24

Physical purchasing of TV programmes/series

The 4% of respondents who had purchased TV in physical formats, such as DVDs or Blu-rays, during the previous 3 months were asked more questions around frequency and number of purchases made.

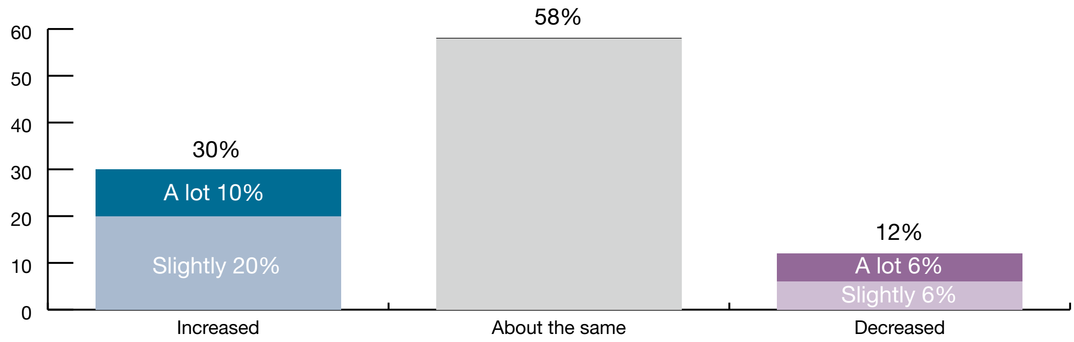
- Approximately a quarter (29%) of these were **frequent purchasers** of TV programmes/series in physical formats.
- Consumption of physical items since COVID-19 was unchanged for over half (58%) of these respondents. The remainder were more likely to have purchased more (30%) than less (12%).
  - Before COVID-19 respondents had purchased, on average, 18 items every three months.
  - During the previous three months the amount they had purchased had increased to, on average, 21 items purchased.
- The small sample size for all age groups means that these breakdowns should be interpreted with caution (e.g. the largest was those aged 25-34 where N= 39).

C2. Generally, how often do you purchase physical TV Series/Programmes?

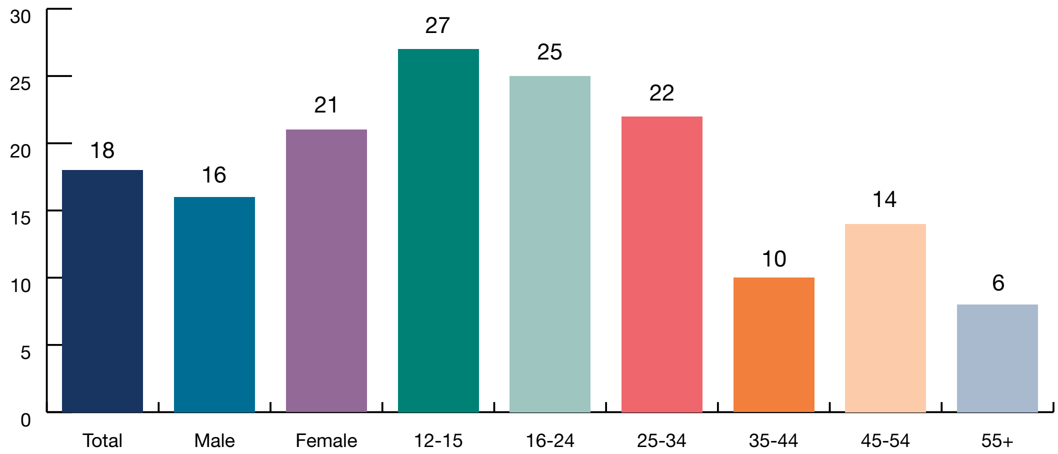


Base: n=177 (those who purchased physical copies of TV Programmes/Series in the past three months)

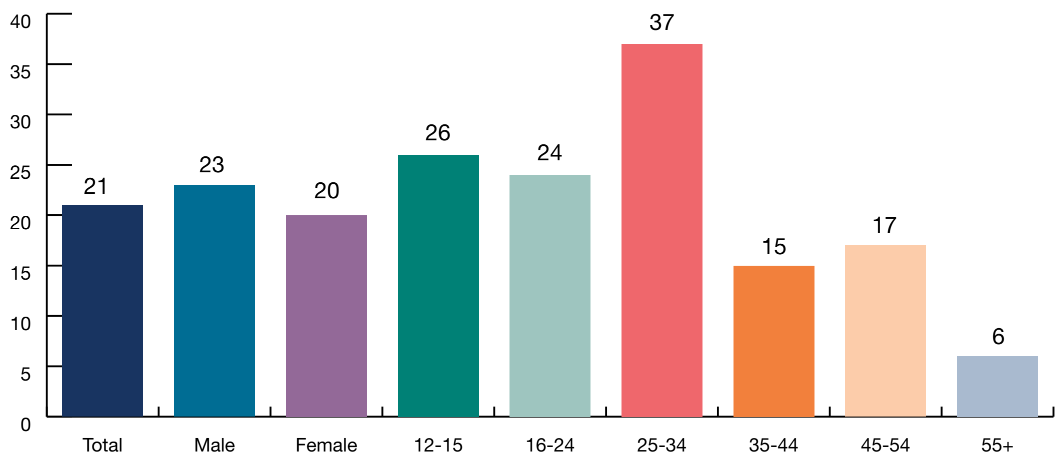
C3. Since the coronavirus (COVID-19) outbreak, would you say the number of physical TV Series/ Programme products has?



C4. Before the coronavirus outbreak, how many physical film products would you say you used to purchase in that same 3-month time period?



C5. In the past 3 months how many physical TV Series/Programmes products (DVDs, Blu-Rays etc.) did you purchase? (Average purchases)



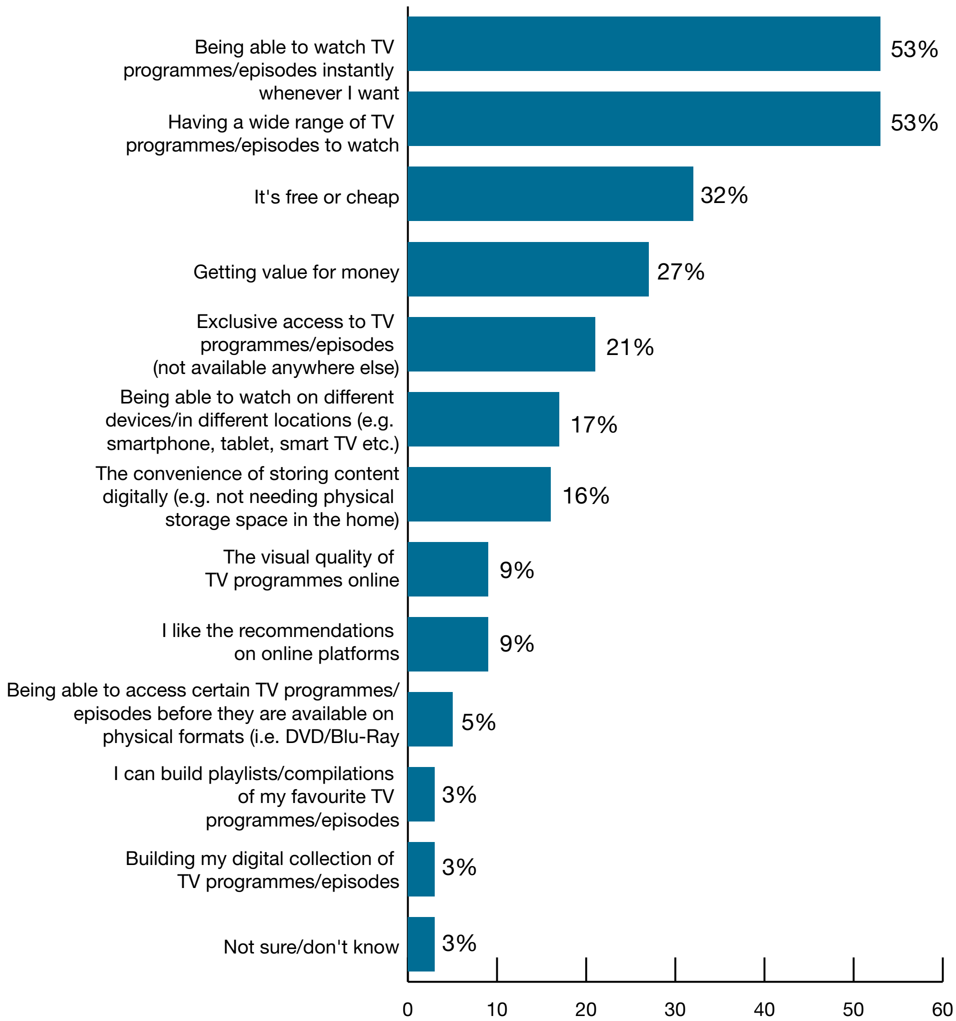
Base: n=116-120 (those who purchased physical copies of TV Programmes/Series in the past three months)

Understanding online consumption of TV programmes/series

To better understand the drivers of online consumption, those who had streamed or downloaded TV programmes/series in the previous 3 months were asked to select their top three reasons for accessing these online.

- Only two reasons were selected by more than half. These related to **ease of access** ("being able to watch TV programmes/episodes instantly whenever I want" 53%) and the **range** of options available ("having a wide range of TV programmes/episodes to watch" 53%).
- The next most dominant theme related to **price**, with a third stating that they access TV programmes/series online because it is "free or cheap" (32%) or offers "value for money" (27%).
- Other factors that were mentioned by approximately a fifth were access to **exclusive content** (21%), **portability** in terms of devices and locations (17%), and the "**convenience** of storing content digitally" (16%).

C6. What are the main reasons that you choose to access TV Programmes/Series online (for example, downloading or streaming) Please select your top 3 (%)



Base: n=2,280 (those who had downloaded or streamed TV Programmes/Series in the past 3 months)

Male respondents	Female respondents
1. Having a wide range of TV Programmes/ Episodes to watch (50%) 2. Being able to watch TV Programmes/Episodes instantly whenever I want (49%) 3. It's free or cheap (35%)	1. Being able to watch TV Programmes/Episodes instantly whenever I want (57%) 2. Having a wide range of TV Programmes/ Episodes to watch (55%) 3. It's free or cheap (29%)
Aged 12-15	**Aged 16-24**
1. Being able to watch TV Programmes/Episodes instantly whenever I want (47%) 2. Having a wide range of TV Programmes/ Episodes to watch (42%) 3. Being able to watch on different devices/in different locations (e.g. smartphone, tablet, smart TV etc.) (26%)	1. Having a wide range of TV Programmes/ Episodes to watch (53%) 2. Being able to watch TV Programmes/Episodes instantly whenever I want (51%) 3. It's free or cheap (30%)
Aged 25-34	**Aged 35-44**
1. Having a wide range of TV Programmes/ Episodes to watch (57%) 2. Being able to watch TV Programmes/Episodes instantly whenever I want (45%) 3. Getting value for money (32%)	1. Being able to watch TV Programmes/Episodes instantly whenever I want (54%) 2. Having a wide range of TV Programmes/ Episodes to watch (52%) 3. Getting value for money (28%)
Aged 45-54	**Aged 55+**
1. Being able to watch films instantly whenever I want (59%) 2. Having a wide range of films/movies to watch (57%) 3. It's free or cheap (33%)	1. Being able to watch films instantly whenever I want (57%) 2. Having a wide range of films/movies to watch (50%) 3. It's free or cheap (44%)

Qualitative insights

TV programmes/series were mainly accessed online with hardly any respondents considering purchasing DVD box sets or any other form of physical copy.

- *"DVD's are less convenient than streaming something."* – Female, 16-24

Streaming TV programmes/series was shown to be **by far the preferred method of access** among the qualitative research respondents. Most described it as the **quickest, most convenient** method to access TV series and few ever accessed such content through other means. With most respondents having spent more time at home, as a result of lockdown, where they mostly had high strength and quality wifi, streaming appeared to be the most logical option.

- *"I much prefer streaming to downloading as you don't have to wait for it to download first which can take a while if you don't have good broadband."* - Female, 45-54

Downloading TV programmes/series was **rare**, with most respondents reporting hardly ever downloading series. Generally, most said that downloading seemed like a hassle, **taking time as well as substantial disk space.**

- *"I don't download TV shows because that would take up too much space on my laptop."* - Female, 16-24

- *"I don't usually download series because I don't usually watch them on the go or without internet and never usually rewatch any - lockdown has not changed this."* - Male, 25-34

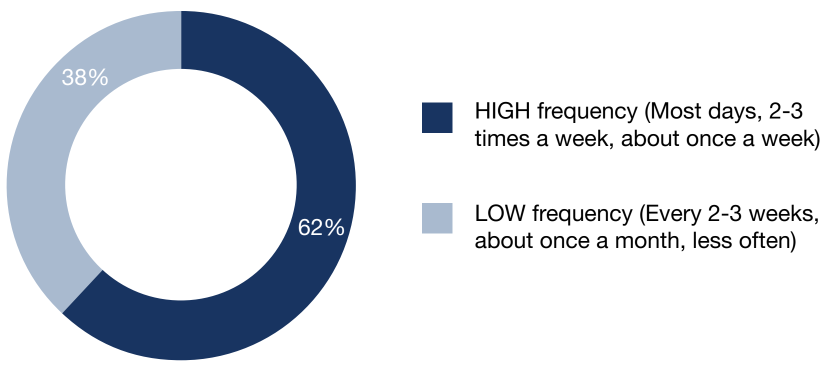
Downloading TV programmes/series

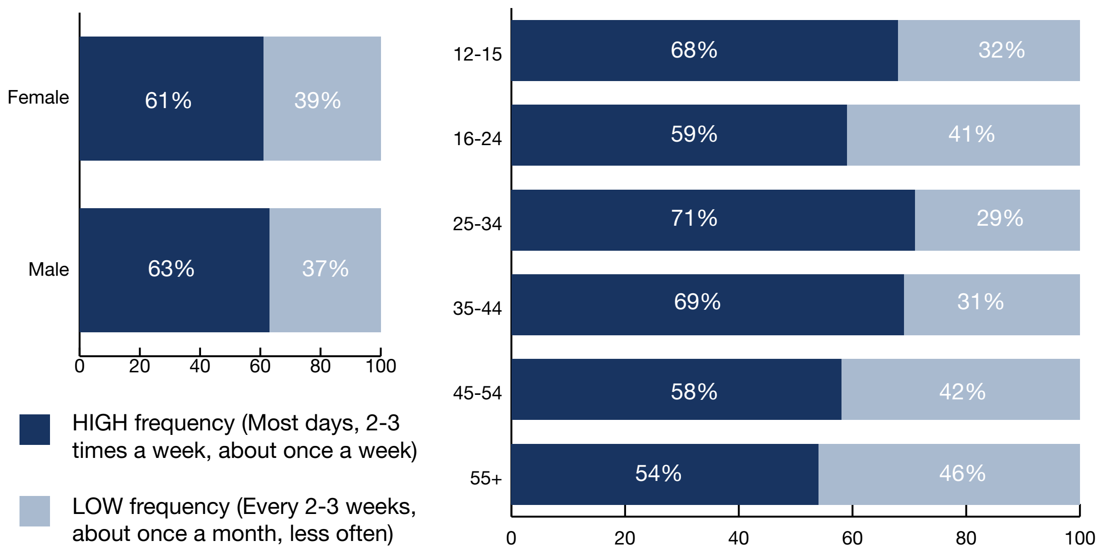
The 16% who had downloaded TV programmes/series during the previous 3 months were asked more questions around frequency, volume and sources used.

Frequency and volume of downloading TV

- Over half (58%) of those who had downloaded TV programmes/series did so frequently (i.e. at least once a week). This was highest among those aged 25-34 (71% downloaded frequently) but was above 50% among all age groups.
- The number of TV programmes/episodes downloaded since COVID-19 had increased for four in ten (41%). It was unchanged for over half (52%) with very few (6%) saying it had decreased.
  - Before COVID-19, respondents had downloaded, on average, 44 programmes/episodes every three months.
  - During the previous three months the amount they had downloaded had increased to, on average, 61 programmes/episodes.
  - In both instances, downloading was most prevalent among those aged 25-34.

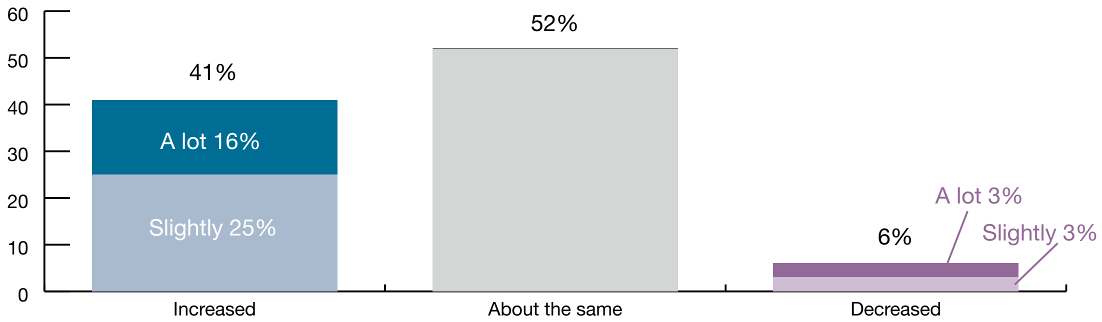
C7. Generally, how often do you download TV Programmes/Episodes through the internet? (%)





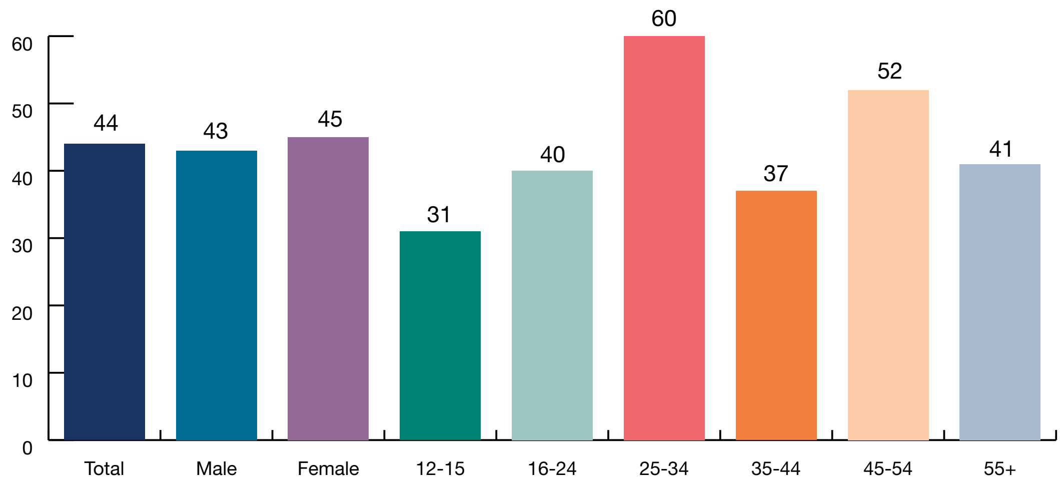
Base: n=784 (those who download TV Programmes/Series in the past three months)

C8. Since the coronavirus (COVID-19) outbreak, would you say the number of TV Programmes/Episodes you are downloading has?

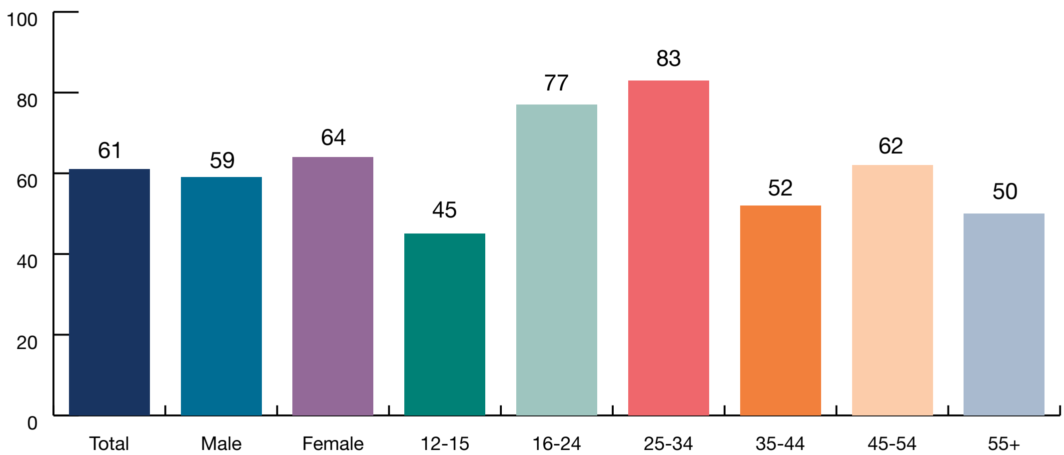


Base: n=784 (those who download TV Programmes/Series in the past three months)

C9. Before the coronavirus outbreak, how many TV Programmes/Series would you say you used to download in that same 3 month time period?



C10. In the past 3 months, how many TV Programmes/Episodes did you download through the internet (average number of downloads)



Base: n=751-773 (those who downloaded TV Programmes/Series in the last 3 months)

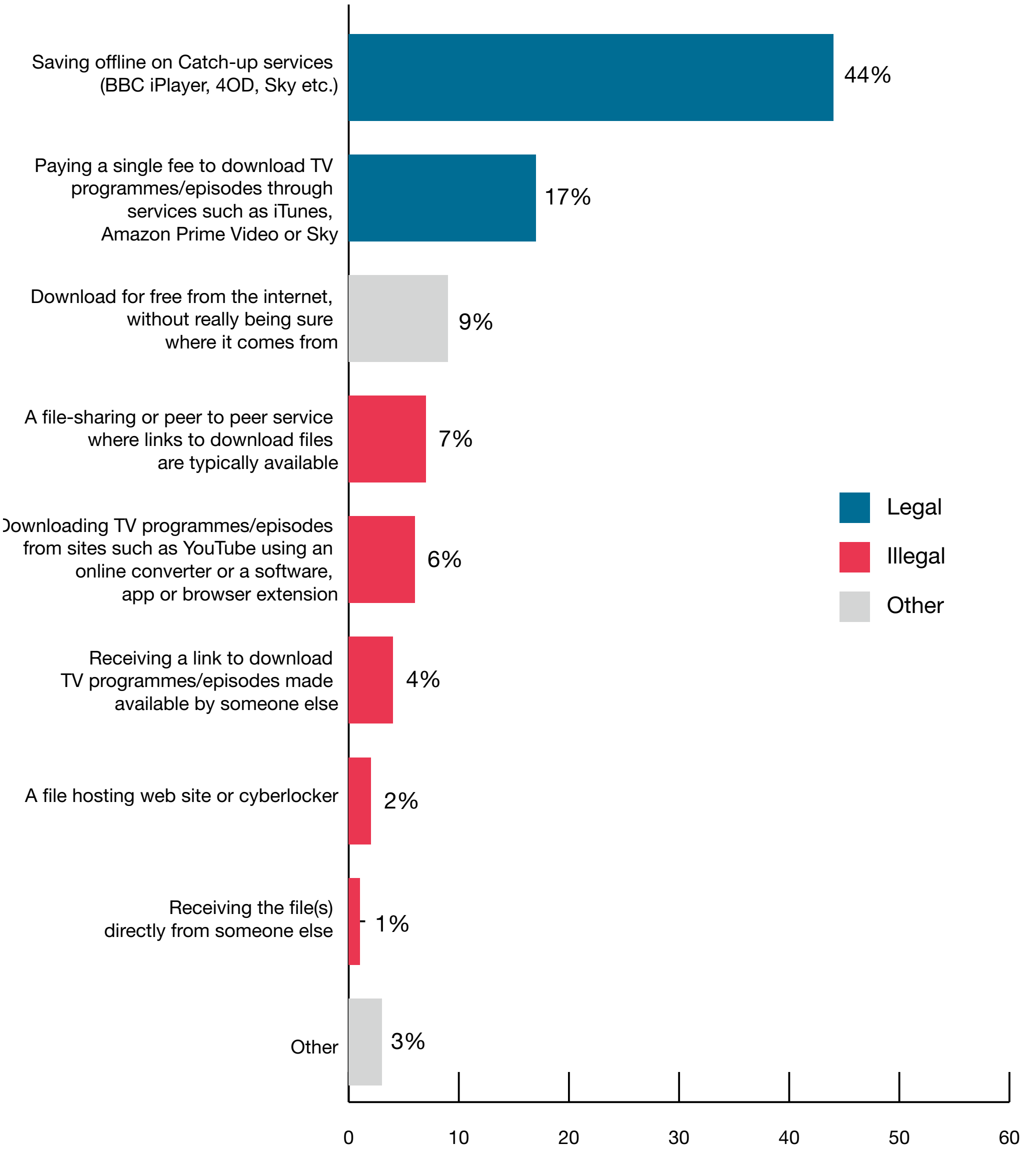
Sources of downloading TV programmes/series

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could download TV programmes/series. An ‘unknown’ option was provided to serve as a catch-all for those who were unsure of the exact source.

- **The most commonly used sources were legal**. The most commonly used method overall was “Saving offline on a paid subscription service”, undertaken by 59% of all TV downloaders. This was followed by 44% “Saving offline on Catch-up services”.

- **No single illegal source was used by more than 7%** of TV downloaders. The most common were **BitTorrents**/file-sharing or peer to peer services (7%) and a **software, app, browser extension or online converter** (6%).

C11. Which of the following have you used to download music in the past 3 months? (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
'Saving offline' on a paid for subscription service such as Netflix, Amazon Prime Video, NowTV etc.	60%	57%	70%	76%	77%	65%	51%	35%
Saving offline on Catch-up services (BBC iPlayer, 4OD, Sky etc.)	36%	54%	39%	34%	32%	41%	44%	60%
Paying a single fee to download TV programmes/ episodes through services such as iTunes, Amazon Prime Video or Sky	18%	17%	22%	12%	23%	20%	18%	12%
Download for free from the internet, without really being sure where it comes from	8%	10%	6%	4%	6%	9%	6%	16%
A file-sharing or peer to peer service where links to download files are typically available	10%	3%	8%	8%	9%	5%	8%	4%
Downloading TV programmes/episodes from sites such as YouTube using an online converter or a software, app or browser extension	7%	6%	6%	6%	4%	7%	5%	9%
Receiving a link to download TV programmes/episodes made available by someone else	4%	3%	4%	2%	5%	5%	4%	3%
A file hosting website or cyberlocker	2%	3%	4%	5%	2%	3%	2%	0%
Receiving the file(s) directly from someone else	2%	1%	4%	2%	1%	3%	1%	0%

Base: n=784 (those who downloaded TV programmes/series during the past three months)

Download for free from the internet, without really being sure where it comes from

Those unsure of the source of their TV downloads were asked, **in a new question this wave**, to explain more about how they obtained them in their own words.

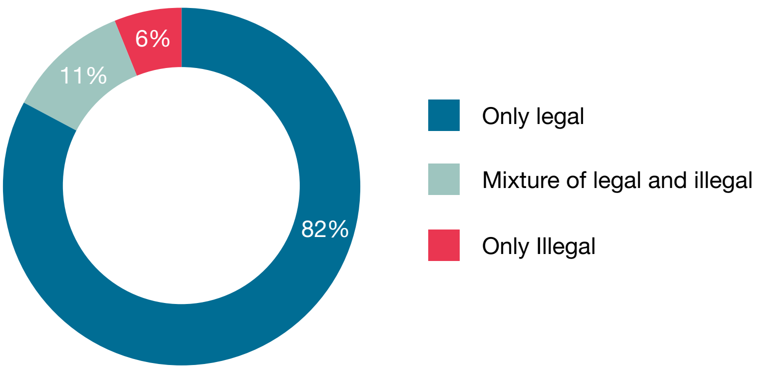
Compared to film, there was more diversity in the responses, though a Google search was again the most common response. A few mentioned going straight to specific websites or receiving links from friends. A couple had watched theatre/opera/musical performances via a link sent to them.

Legality of TV programmes/series downloads

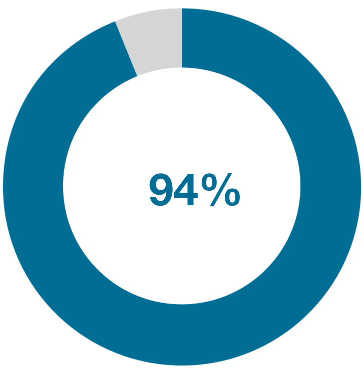
To better understand the distribution of sources across legal and illegal categories, those who had downloaded TV programmes/series in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

The answer option "download for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they **only** consumed content this way was not included in the base.

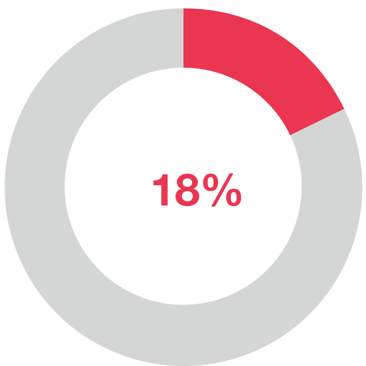
- Legal:
  - 94% had used a legal source to download TV programmes/series.
  - 82% had used legal sources only to download TV programmes/series.
- Illegal:
  - 18% had used an illegal source to download TV programmes/series.
  - 6% had used illegal sources only to download TV programmes/series.
- Mixed:
  - 11% had used a mix of legal and illegal sources to download TV programmes/series.
  - Use of a mix of sources was highest among those with a ‘high’ passion for TV at 16% (8% higher than those with a ‘medium’ level and 12% higher than those with a ‘low’ level).

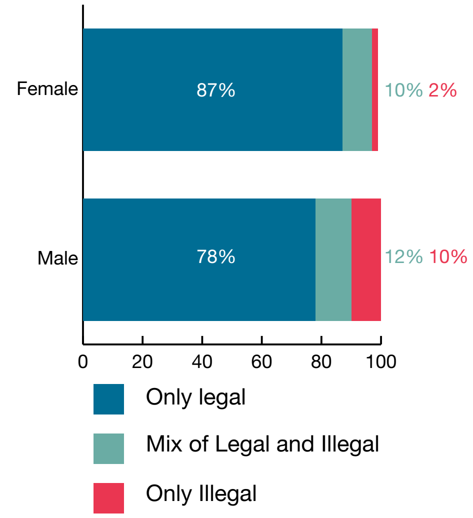


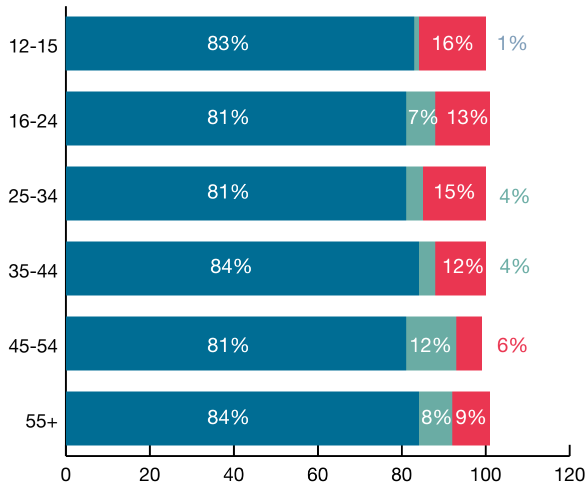
Total legal

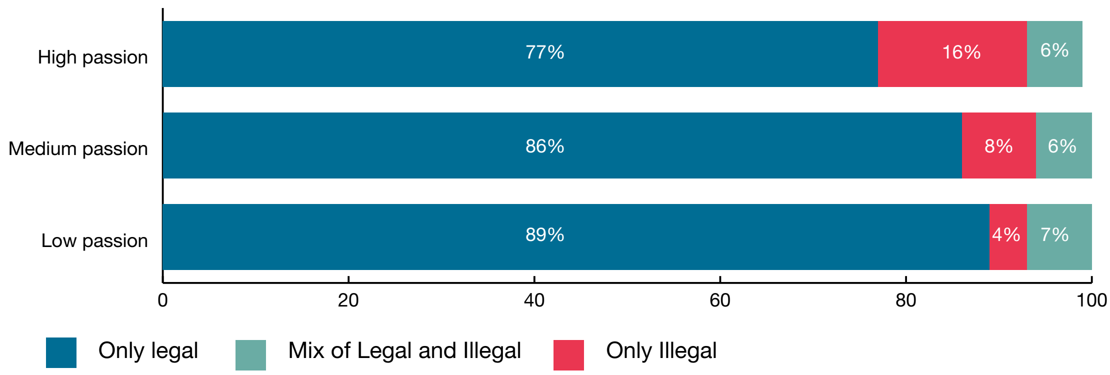


Total illegal









C12. And how is the way you download TV Programmes/Series typically split across the following sources?

Legality	Source	Average % of usage split	Average number of downloads
Legal	'Saving offline' on a paid for subscription service such as Netflix, Amazon Prime Video, NowTV etc.	45%	31
	Paying a single fee to download individual full-length films or movies through services such as iTunes, Amazon or Sky	10%	5
	Saving offline on TV catch-up services (BBC iPlayer, 4OD etc.)	28%	15
Illegal	A file-sharing or peer to peer service where links to download files are typically available	4%	5
	Downloading TV programmes/episodes from sites such as YouTube using an online converter or a software, app or browser extension	2%	1
	Receiving a link to download TV programmes/episodes made available by someone else	2%	1
	A file hosting website or cyberlocker	1%	1
	Receiving the file(s) directly from someone else	1%	0
Other	Download for free from the internet, without really being sure where it comes from	6%	1
	Other	2%	1

Base: n=784 (those who downloaded TV Programmes/Series in the past 3 months)

Qualitative insights

Downloading TV programmes/series illegally was **not common,** as many felt downloading illegal content was **risky** in terms of catching potential viruses along with additional considerations around the time required to download as well as the amount of disk space. One mentioned that he used to download TV series through Torrent sites before the arrival of Netflix and Amazon Prime etc. but that these sites had now taken over as his go-to method of consumption.

- *"I don't often revisit shows enough to have them downloaded, and that way there's less risk of viruses/ malware."* - Male, 25-34
- *"I used to use bit torrent quite frequently for downloading TV shows before the likes of Netflix, Amazon and Kodi. I don't do it now due to the size of the files/time to download and the danger of a virus. As a lot of sites were removed or put out of business due to the illegal nature of it, it became more difficult to find the content."* - Male, 45-54
- *"When you stream I feel like you leave yourself open to less viruses than if you were to download because I feel like with downloading, you're physically downloading the virus onto whatever you're watching it on, but with streaming I feel it's a little more protected."* - Female, 16-24

One respondent, however, said that he **exclusively downloads** TV programmes/series because he **only ever accesses this content for free,** as, contrary to most, **does not trust the streaming sites**. He reported having built up a number of trusted Torrent sites which he uses to download, with a high quality anti-virus software to protect from malware.

- *"I have a couple of sites that I regularly use for torrent links. Beyond YouTube, Vimeo, etc, I would not look to stream TV shows online personally, as I do not trust the sites when using an Android Box - vs browsing Torrent sites on a PC with enterprise grade anti-virus & firewall, a VPN, etc."* - Male, 45-54

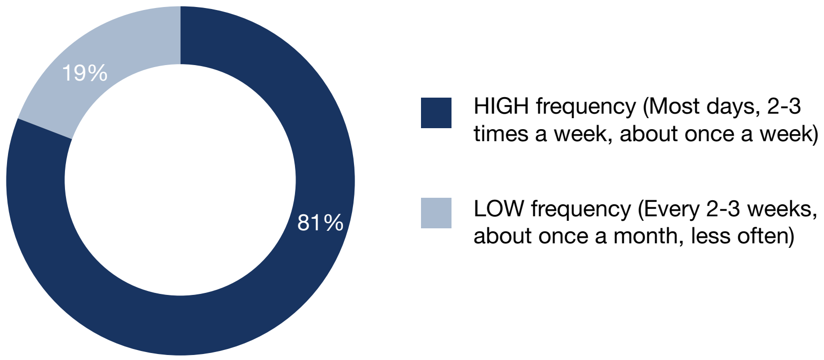
Streaming TV programmes/series

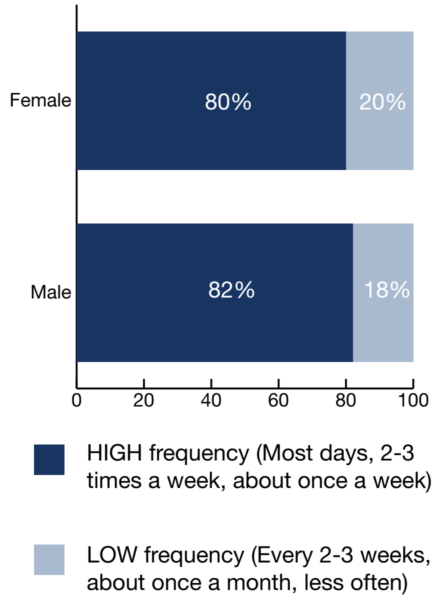
The 42% who had streamed TV programmes/series during the previous 3 months were asked questions around frequency, volume and sources used.

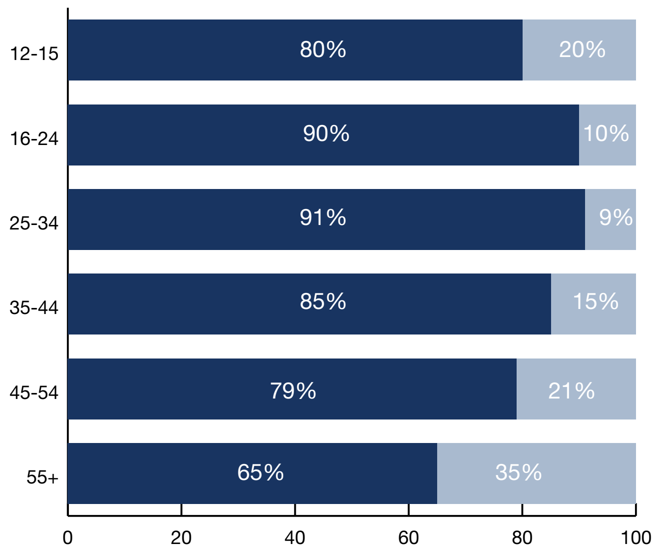
Frequency and volume of streaming TV programmes/series

- **Eight in ten (81%) were frequent streamers of TV programmes/series**, doing so weekly.
- Frequency of streaming was generally consistent among those aged **12-54**, and then dropped slightly for those aged 55+.
- The amount of TV streamed since COVID-19 had increased for over half (56%) of respondents. Approximately four in ten (40%) said the amount of TV programmes/series they had streamed hadn't changed, with very few (3%) saying it had decreased.
    - Before COVID-19, respondents had streamed, on average, 83 hours of TV programmes/series every three months.
    - During the previous three months the number of hours they had streamed TV programmes/series had increased substantially to, on average, 128 hours.
    - There were increases in all age groups with the largest among those aged 16-24, which increased by 94 hours.

C13. Generally, how often do you stream TV Programmes/Series through the internet? (%)

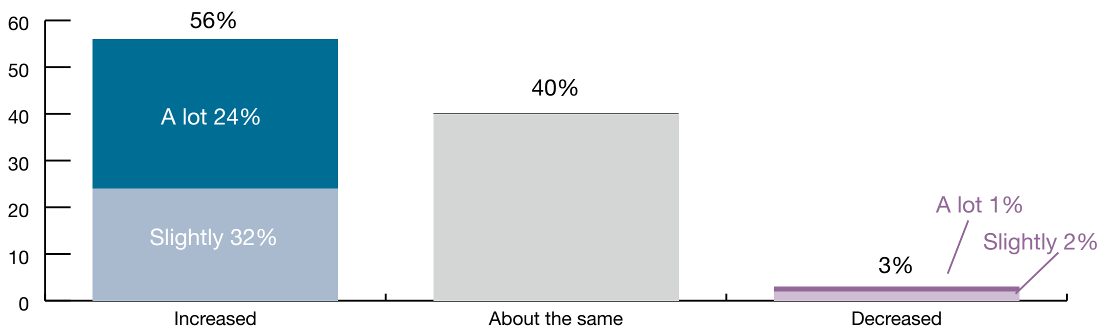






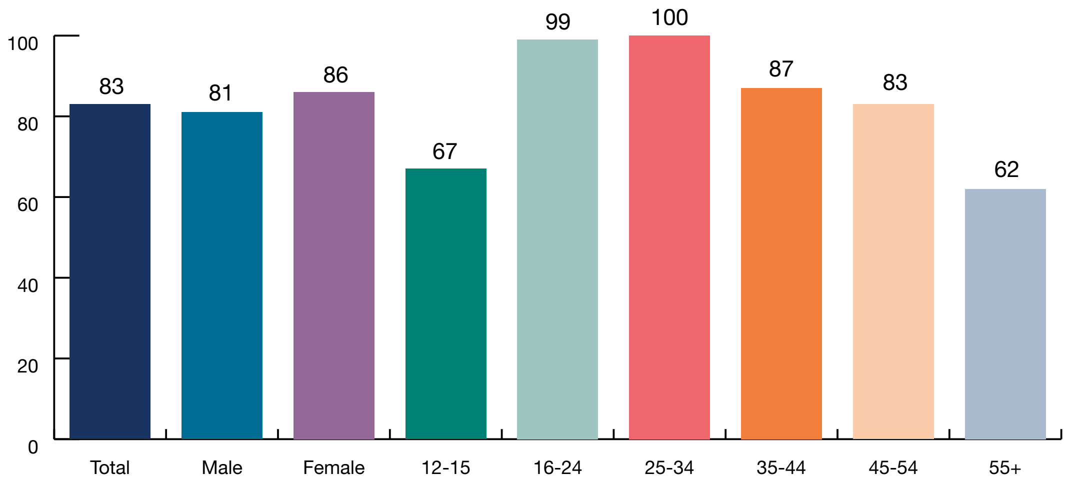
Base: n=2,100 (those who streamed TV Programmes/Series in the past three months)

C14. Since the coronavirus (COVID-19) outbreak, would you say the number of hours you spend streaming films/movies has?

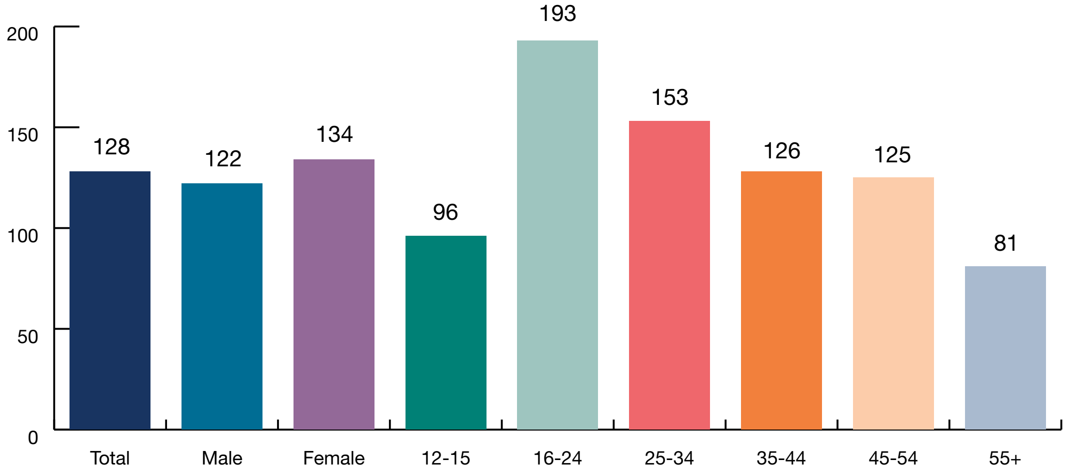


Base: n=2,100 (those who streamed TV Programmes/Series in the past three months)

C15. Before the coronavirus outbreak, how many hours would you spend streaming films/movies in that same 3 month time period? (Average number of hours)



C16. In the past 3 months, how many hours did you spend streaming TV programmes/episodes through the internet? (Average number of hours)



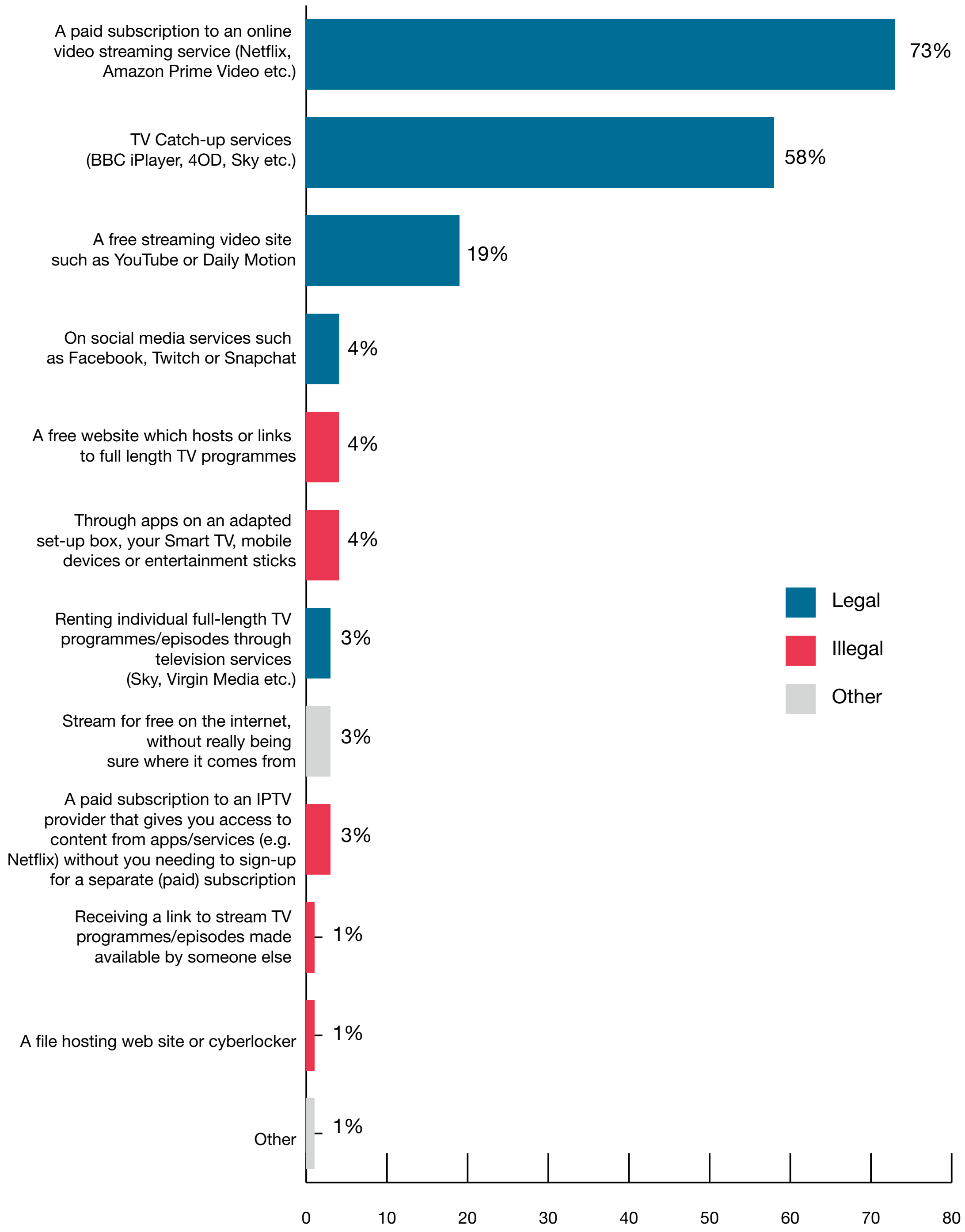
Base: n=2,043-2,089 (those who streamed TV Programmes/Series in the past 3 months)

Sources of TV programmes/series streaming

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could stream TV programmes/series. An ‘unknown’ option was provided to serve as a catch-all for those who were unsure of the exact source.

- **Legal sources were the most used.** Furthermore, the top option was a paid source, with 73% using a **“paid subscription to an online video streaming service”**. This was closely followed by “TV Catch-up services”, which were used by well over half (58%). Approximately a fifth (19%) used “A free streaming video site such as YouTube”.
- **No illegal source was used by more than 4%**. It is notable, however, that 8% of those aged 16-24 said that they had used “A free website which hosts or links to full length TV programmes” (this was twice as much as the amount this source was used by the total sample).

C17. Which of the following have you used to stream TV Programmes/Series in the past 3 months? Please select all that apply (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
A paid subscription to an online video streaming service (Netflix, Amazon Prime Video etc.)	73%	74%	81%	87%	87%	78%	74%	48%
TV catch-up services (BBC iPlayer, 4OD, Sky etc.)	55%	62%	44%	44%	53%	53%	67%	74%
A free streaming video site such as YouTube or Daily Motion	21%	16%	15%	19%	18%	18%	17%	23%
On social media services such as Facebook, Twitch or Snapchat	5%	3%	8%	7%	4%	4%	3%	2%
A free website which hosts or links to full length TV programmes	4%	4%	2%	8%	6%	5%	3%	1%
Through apps on an adapted set-up box, your Smart TV, mobile devices or entertainment sticks	4%	4%	3%	2%	4%	5%	4%	5%
Renting individual full-length TV programmes/episodes through television services (Sky, Virgin Media etc.)	3%	3%	4%	3%	5%	3%	3%	2%
Stream for free on the internet, without really being sure where it comes from	3%	3%	2%	3%	3%	2%	2%	4%
A paid subscription to an IPTV provider that gives you access to content from apps/services (e.g. Netflix) without you needing to sign-up for a separate (paid) subscription	3%	3%	5%	2%	4%	4%	3%	2%
Receiving a link to stream TV programmes/episodes made available by someone else	1%	1%	2%	1%	2%	1%	1%	1%
A file hosting web site or cyberlocker	1%	0%	2%	1%	1%	1%	0%	0%
Other	1%	1%	1%	0%	0%	1%	1%	2%

Base: n=2,100 (those that stream TV Programmes/Series in the past three months from the listed sources, unsure removed)

Stream for free on the internet, without really being sure where it comes from

Those unsure of the source of their TV streams were asked, **in a new question this wave**, to explain more about how they obtained them in their own words.

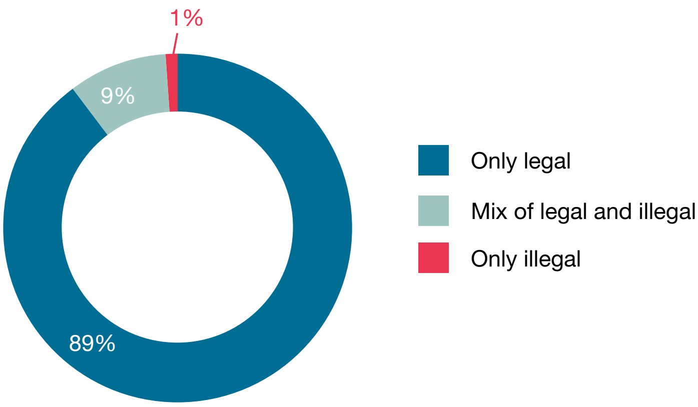
A Google search was the most common means of identifying sources for streaming TV programmes/series.

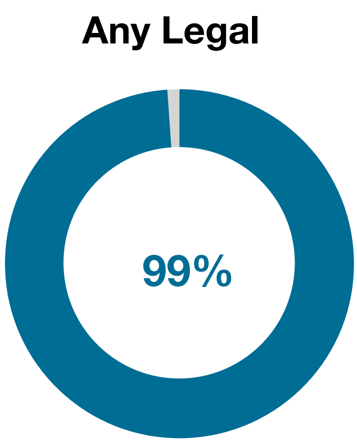
Legality of TV programmes/series streaming

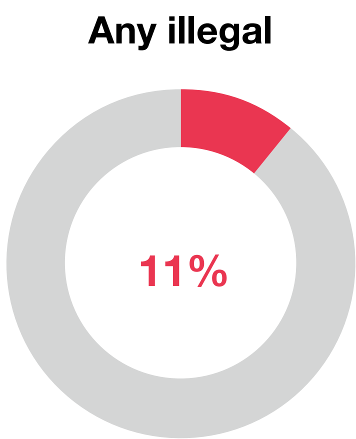
To better understand the distribution of sources across legal and illegal categories, those who had streamed TV programmes/series in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

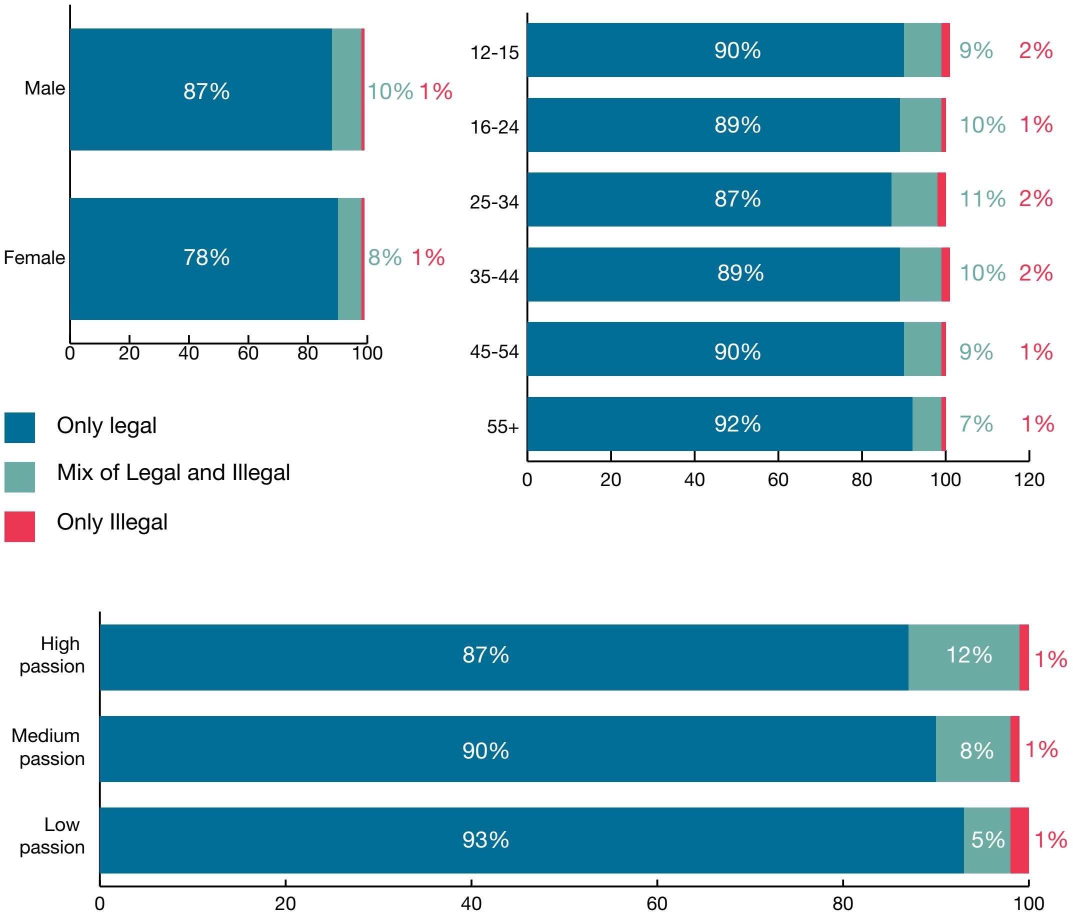
The answer option "Stream for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they **only** consumed content this way was not included in the base.

- Legal:
  - Almost all (99%) had used at least one legal source to stream TV programmes/series.
  - **89%** had used legal sources only to stream TV programmes/series.
- Illegal:
  - 11% had used at least one illegal source to stream TV programmes/series.
  - **1%** had used illegal sources only to stream TV programmes/series.
- Mixed:
  - 9% had used a mix of legal and illegal sources to stream TV programmes/ series.









Base: n=2,074 (those who have streamed TV Programmes/Series in the last three months with those who selected 'other' or 'not sure of source' removed)

C18. And how is the way you streamed music typically split across the following sources?

Legality	Source	Average % of usage split	Average number of hours
Legal	A paid subscription to an online video streaming service (Netflix, Amazon Prime Video etc.)	54%	86
	TV catch-up services (BBC iPlayer, 4OD etc.)	31%	28
	A free streaming video site such as YouTube, Vevo or Vimeo	7%	6
	Renting individual full-length films through television services (Sky Go, Virgin Media etc.)	1%	1
	On Social media services such as Facebook, Twitter, Instagram or Snapchat	1%	1

Legality	Source	Average % of usage split	Average number of hours
Illegal	A free website which hosts or links to full-length films	1%	2
	Through apps/services that you do not have a paid subscription to but can be accessed through apps/services on an adapted set-up box, your Smart TV, mobile devices or entertainment sticks	1%	2
	A paid subscription to an IPTV provider that gives you access to content from apps/services without you needing to sign-up for a separate (paid) subscription	1%	1
	A file hosting website or cyberlocker	0%	0
	Receiving a link to stream TV programmes/episodes made available by someone else	0%	0
Other	Stream for free on the internet, without really being sure where it comes from	1%	1
	Other	1%	0

Base: n=2,100 (those who streamed TV Programmes/Series in the past 3 months)

Qualitative insights

The reasons for **streaming illegally** revolved around **cost as well as convenience**. Many talked about not always being able to find the content they were looking for on their paid subscription and not wanting to miss out on that content or sign up to another platform in order to access it. There was no indication that lockdown had increased the use of illegal streaming methods beyond the proportionate increase in consumption of TV content in general. More specifically, no respondents reported having had to cancel any subscriptions during lockdown, they were simply **watching more TV content** overall **via both official and non-official means** due to having more time.

- *"At times it does happen that the show I'm searching for is not on any of the paid sites. Then I would try to get the content through YouTube or a few sites like Enthusias etc"* - Male, 25-34

- *"Most of the TV I watch is paid for but I use streaming sites if I can't access a particular show. Nothing has changed since lockdown in this regard."* - Male, 45-54

In relation to the process of illegally streaming TV series, all respondents maintained that this was relatively **simple and easy**. Most knew particular sites which they often went to and had good experiences with, i.e. ones they deemed to be fairly safe or with few ads and 'pop-ups', while others simply said they Googled the name of the series they wanted to watch and followed the various links. Though the quality of streaming from illegal sites was noted to be poorer than from official sites, a **lower quality experience for free** was preferred over **not watching at all or having to pay a one-off fee**.

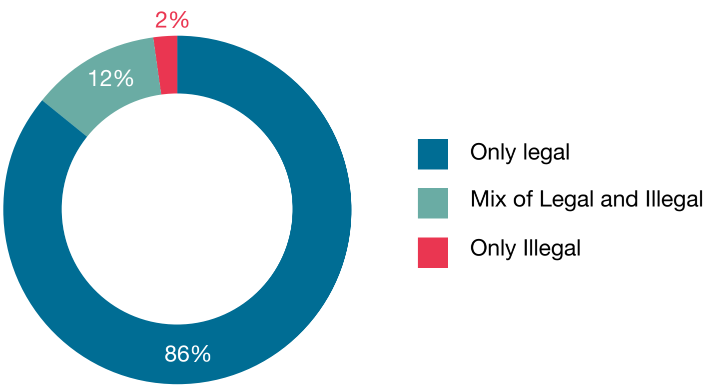
- *"I would check on watchseries to see if they had it and watch it on there, as they usually do have most of the shows I want to watch."* - Female, 16-24

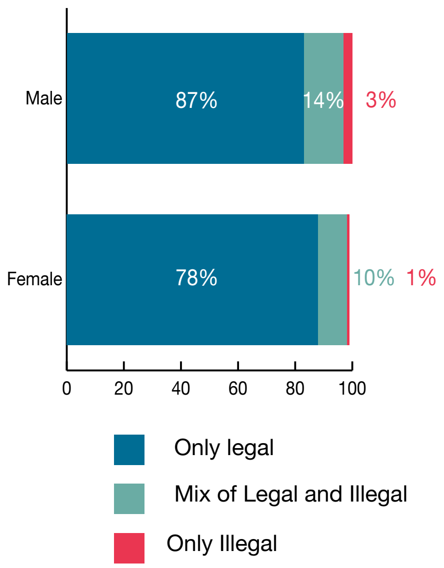
- *"To stream it without any of those services I would type the series in on Google followed by free online and then I would go to the site that looks most reliable, so for me I rely on Putlocker for things like that."* - Female, 16-24

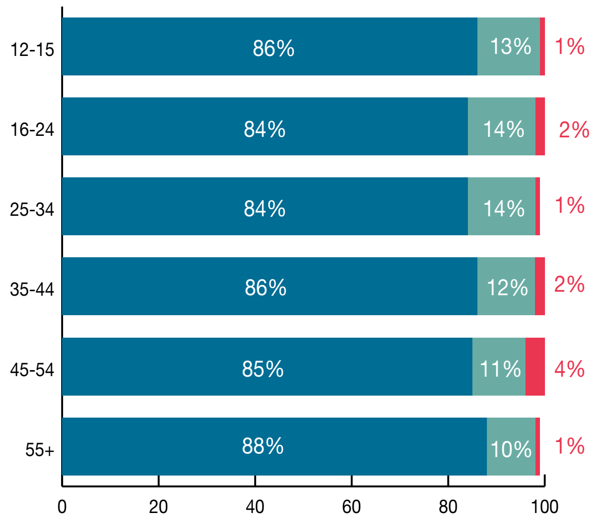
Combined downloading and streaming of TV programmes/series

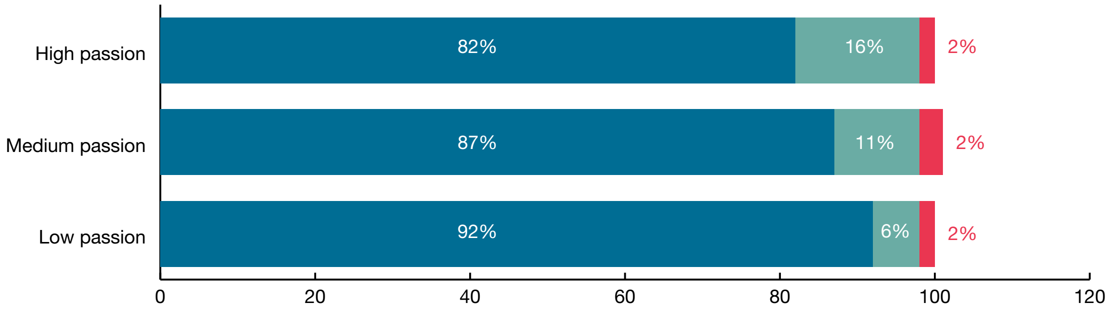
The use of legal and illegal sources for TV programmes/series access (i.e. for both downloading and streaming) were combined to allow us to look at the category as a whole.

- Legal:
  - **86%** indicated that they use legal sources only.
- Illegal:
  - **2%** used illegal sources only.
- Mixed:
  - **12%** used a mix of legal and illegal sources.
  - Using a mix of legal and illegal sources was highest among those with a ‘high’ passion for TV (it was 5% higher than those with a ‘medium’ passion and 10% than those with a ‘low’ passion).









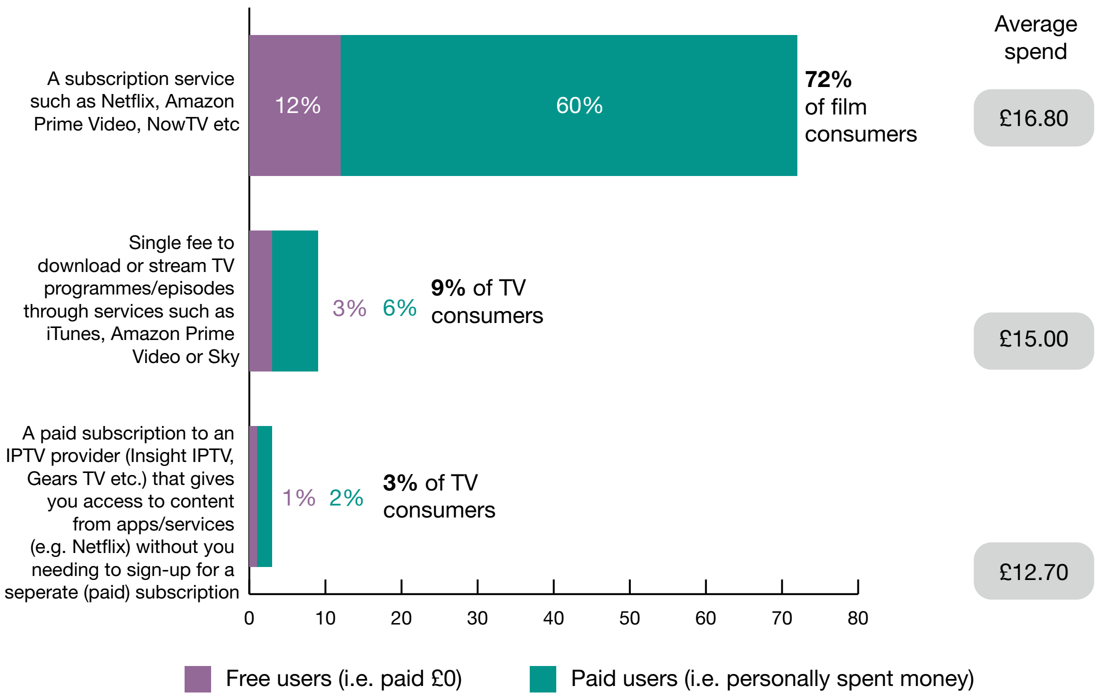
Base: n=2,239 (those who have streamed and/or downloaded TV Programmes/Series from a legal or illegal source with those who only selected 'not sure of source' counting as illegal)

Paying for TV

In a new question this wave, those who had used a paid source to either download or stream TV programmes/ episodes were asked how much they had personally spent on each source.

- Seven in ten (72%) of TV consumers said they had used **a paid subscription service** (e.g. Netflix) in the past three months. Most of those (60% of TV consumers) said they had personally spent money on this in the past month. They spent, on average, £16.80 each month.
- Approximately one in ten (9%) had paid a single fee to download or stream individual TV programmes/series through services such as iTunes. They spent, on average, a similar amount to that which is spent on paid subscription services (£15.00 each month).
- A relatively small amount used illegal paid services such as a paid subscription to a IPTV provider. They paid, on average £12.70 each month.

C19. Approximately how much do you personally spend each month on the below sources of streaming or downloading TV Programmes/Series?



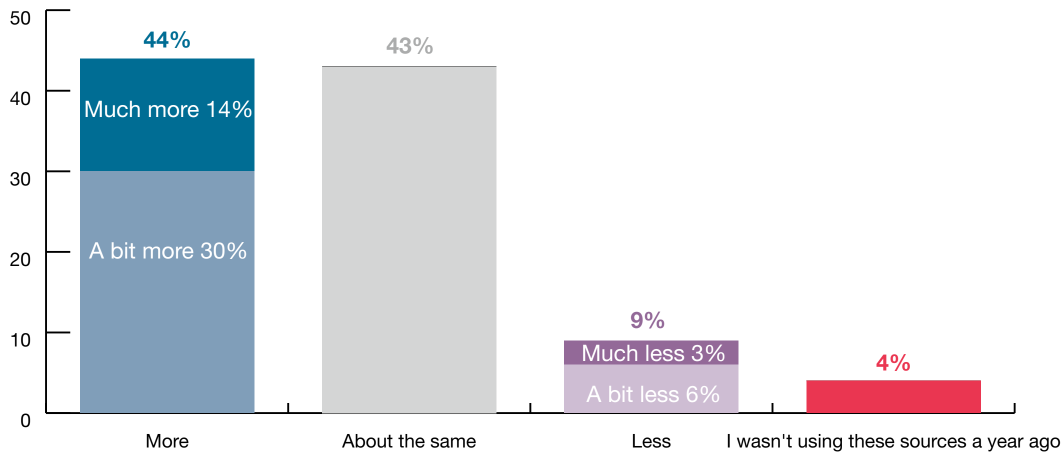
Base: n=2,284 (those who downloaded or streamed TV Programmes/Series in the past 3 months, n=18-1,627 (those who use each source)

Change in use of illegal sources

In a new question this wave, those who had used an illegal source to download or stream TV programmes/series were asked how the use of these sources compares to the same point a year ago.

- Respondents were fairly evenly split between those whose usage had remained the same (43%) and those whose had increased (44%). A relatively small number said their usage had decreased (9%) or that they weren't using these sources a year ago (4%).

C20. Compared with the same point a year ago, would you say you are using those illegal sources...



Those whose usage of illegal sources had changed since the previous year were asked a follow up open text question about the reasons for this change.

Those who were using illegal sources to access TV programmes/series **more** than they were a year ago highlighted that they were doing so because they had **more time** on their hands due to lockdown, coupled with **not being able to find the shows** they were looking for on their subscription services.

- *"They [illegal sites] are convenient, I have more time and there are lots of good shows around right now that have been recommended to me."* - Female, 25-34
- *"I discovered a new [illegal] site fairly recently which was more reliable and of better quality than the ones that I tried before and whose services are less interrupted by unwanted advertising."* - Male, 55+
- *"I have a Sky subscription but I feel that I can't find anything decent to watch unless I pay for it which annoys me as I already pay a subscription to them"* - Female, 45-54
- *"I use these services more as I am able to watch series for free online and I have found a way to access the content quickly with few advertisements."* - Male, 25-34

Those who were using these sources **less** than they were a year ago highlighted that their use of legal sources had increased. Some recently began paying for a subscription to Netflix or Amazon Prime. Others felt that both streaming services and TV catch-up services had noticeably improved their catalogue of shows in recent years, reducing the need to access shows illegally.

- *"Because TV companies are releasing much more of their back catalogue, I use Netflix much more"* - Male, 45-54
- *"There's more available on other [legal] sources now"* - Female, 25-34
- *"A lot of these shows are finally becoming available on the platforms I pay for."* - Male, 16-24
- *"I am using Amazon Prime more"* - Female, 35-44

The small number of respondents who had **started using** illegal sources since the same point last year highlighted that convenience and recommendations from friends were both factors in why they had started doing so.

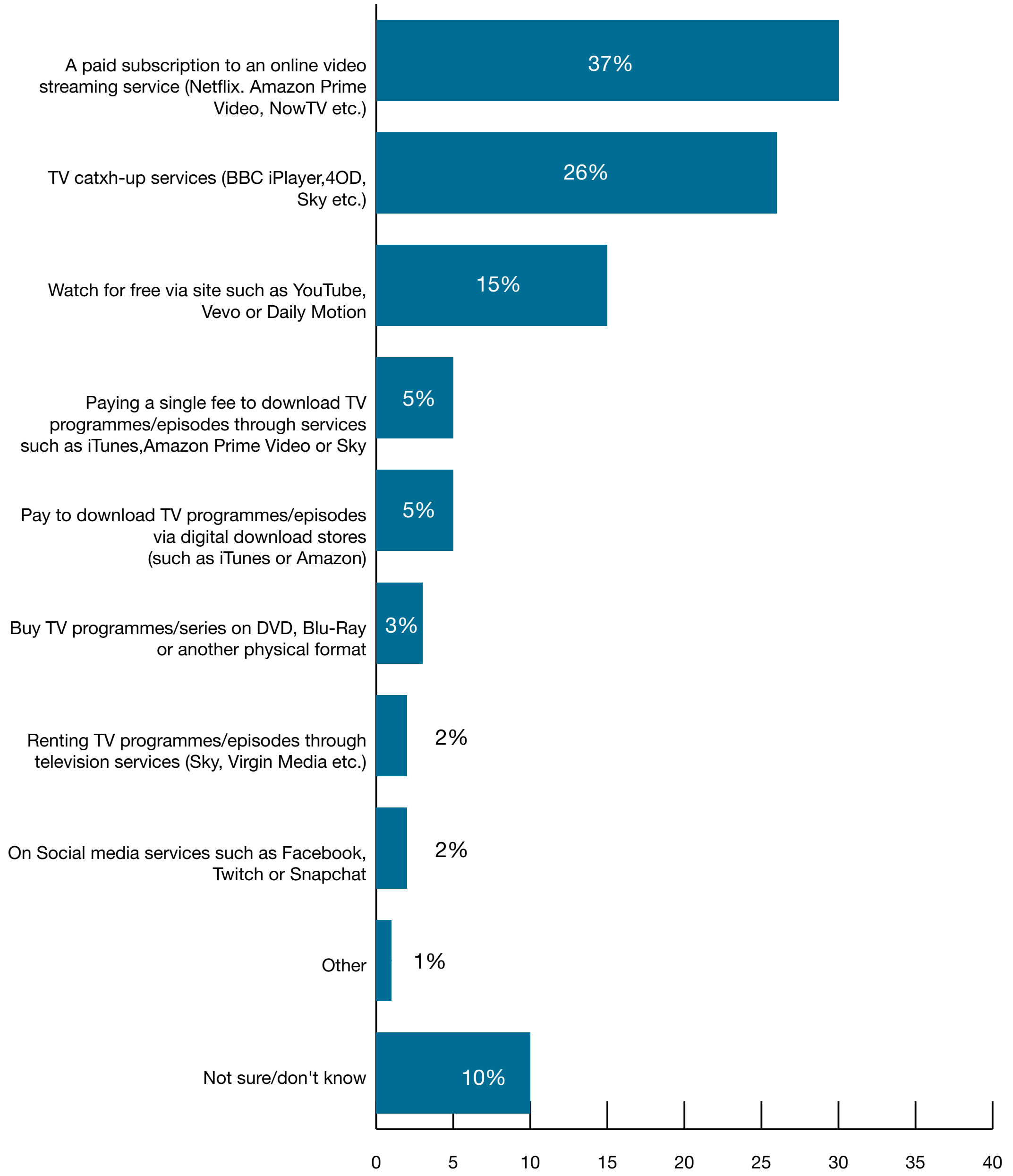
- *"A friend recommended a site to me"* - Male, 25-34
- *"It's easy"* - Female, 45-54
- *"It's convenient"* - Male, 45-54

Alternatives to infringement

Those who had used illegal sources to either download or stream TV programmes/series were asked which **single** legal source they would use if they could no longer access them illegally.

- Overall, the **most commonly chosen option was a paid one**, with just under a third (30%) saying that they would "pay for a subscription or use a paid for premium tier of a video streaming service".
- Using "TV catch-up services" was close behind at 26%, followed by free video sites such as YouTube at 15%.
    - No other single source was selected by more than 5%, with 10% indicating that they were unsure what they would do.

C21. If TV Programmes/Series were no longer available to download or stream via these illegal sources, which other source, if any, would you go to instead? (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
A paid subscription to an online video streaming service (Netflix, Amazon Prime Video, NowTV etc.)	33%	26%	36%	41%	33%	32%	24%	20%
TV catch-up services (BBC iPlayer, 4OD, Sky etc.)	24%	29%	13%	13%	22%	29%	29%	41%
Watch for free via site such as YouTube, Vevo or Daily Motion	12%	20%	17%	12%	19%	15%	20%	11%
Paying a single fee to download TV programmes/ episodes through services such as iTunes, Amazon Prime Video or Sky	4%	8%	8%	13%	4%	2%	7%	1%
Pay to download TV programmes/episodes via digital download stores (such as iTunes or Amazon)	6%	3%	0%	8%	8%	6%	0%	3%
Buy TV programmes/series on DVD, Blu-Ray or another physical format	3%	2%	13%	2%	3%	0%	2%	2%
Renting TV programmes/ episodes through television services (Sky, Virgin Media etc.)	2%	3%	0%	4%	3%	2%	0%	3%
Other	2%	0%	0%	2%	0%	0%	2%	3%
Not sure/Don't know	13%	6%	8%	5%	6%	13%	15%	13%

Base: n=316 (those that have downloaded and/or streamed TV Programmes/Series illegally)

Qualitative insights

In reaction to the hypothetical removal of illegal sources, many said they would be **disappointed** but would adjust to having to use only legal methods. The predominant view was that it would **limit their viewing** but that they would have enough content through online streaming services that their viewing **wouldn't decline too much**.

- *"I'd be a little indifferent since I already pay for Netflix and Apple TV. But it would be helpful if there were other free, legal ways of accessing shows."* - Female, 16-24
- *"I would be able to watch most of the shows I watch now so I wouldn't feel much different and since I'm already subscribed to Netflix and Disney+, I'd probably just remain with these 2 paid subscriptions so it wouldn't affect cost either. I'd miss having the ability to find any show, but there would be enough shows to watch that it wouldn't be a problem."* - Female, 16-24

However, some felt **more negatively**, implying that given the way the TV industry is set up, there would be lots of content they would miss out on if they did not sign up to a range of different providers. Additionally, they explained they would not be able to watch as many American or other foreign series which were thought thought not to be widely available on UK subscriptions. Given the amount of different TV content providers, respondents said they **would not be willing to pay beyond the subscriptions they already held,** as doing so would not be economically viable.

- *“I would be upset that I couldn’t access the TV series through any other platforms. I wouldn’t spend any more than I already do as it’s expensive for what you get. Sky and Amazon are the two I use, and this would be all I use. I would miss not being able to choose exactly what I want to watch but what these platforms say I have a choice of.”* - Female, 45-54
- *“I think I’d be sad because it would limit what I could watch and eventually you would end up feeling a bit left out in certain circumstances. By this I mean, very few people can subscribe to all of the relevant platforms, so you would have to make a choice, at which point certain shows which become big and common topics of conversation you would end up missing out on. I think I would miss the ability to find what I wanted, the ideal solution to this would be to have a ‘Spotify for TV’ solution, where the service has 99% of anything you would ever want available on it.”* - Male, 25-34
- *“Having to subscribe to more and more different services is completely unaffordable for significant numbers of people - and the inability to access a wide variety of media creates both ‘cultural poverty’ and issues with social interaction.”* - Male, 45-54

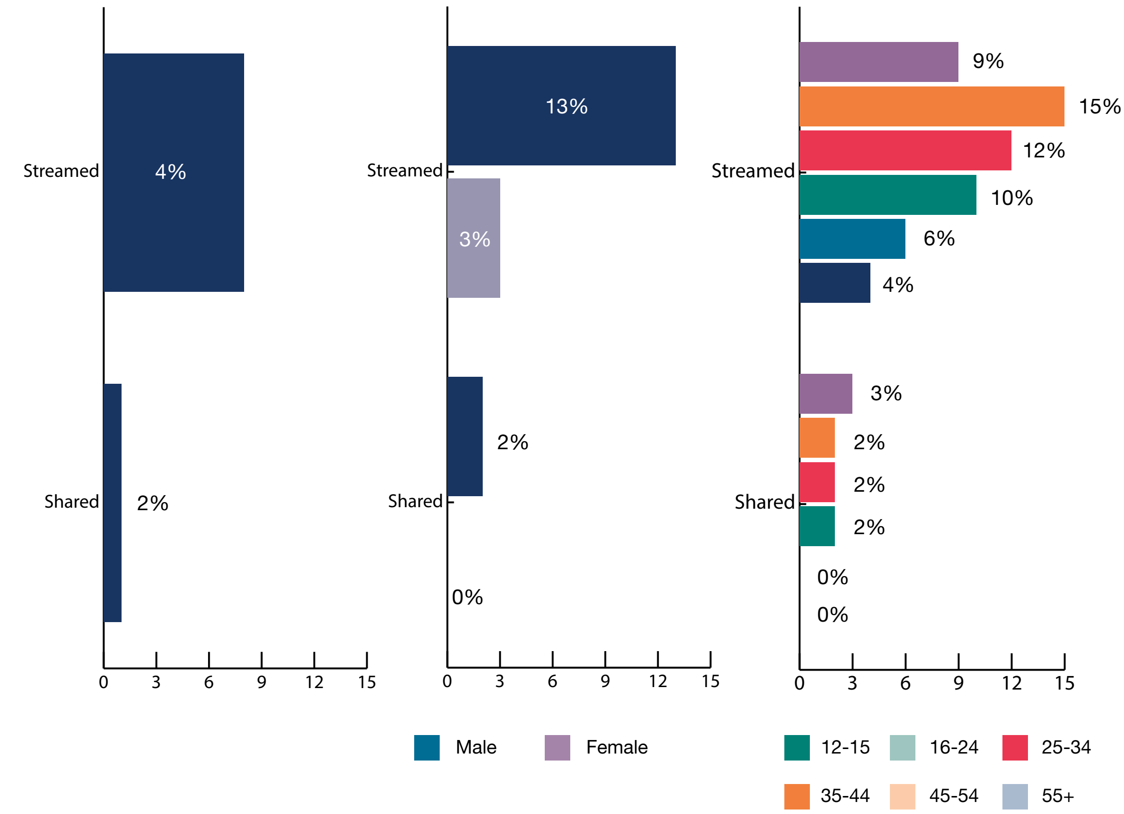
While lockdown has been a time that TV content has become the number one past time for many, encouragingly **there was no distinct sense that it would be any worse** to lose illegal forms of access during this period as opposed to more normal times. These methods were almost always simply **‘top ups’ to respondents’ existing subscriptions** which had been the main form of consumption throughout lockdown, just as before. Only one respondent said he would pay for additional subscriptions to help fill his time in lockdown if illegal methods were to disappear, emphasising that he would cancel these once lockdown was lifted.

Engaging with live sport

8% had engaged with live sports in the previous 3 months (i.e. either by streaming or sharing). As highlighted in the methodology, during the majority of the time period covered there was less live sport taking place than would usually be expected owing to the COVID-19 pandemic. The time period does include some time before live sport ceased as well as when some live sports, especially those outside the UK, were starting up again.

- Overall, 8% had streamed live sports in the previous 3 months.
- Streaming live sports was notably higher among men (13%) than women (3%), and those aged 16-34.

D1. Have you streamed/shared live sport in the past 3 months?



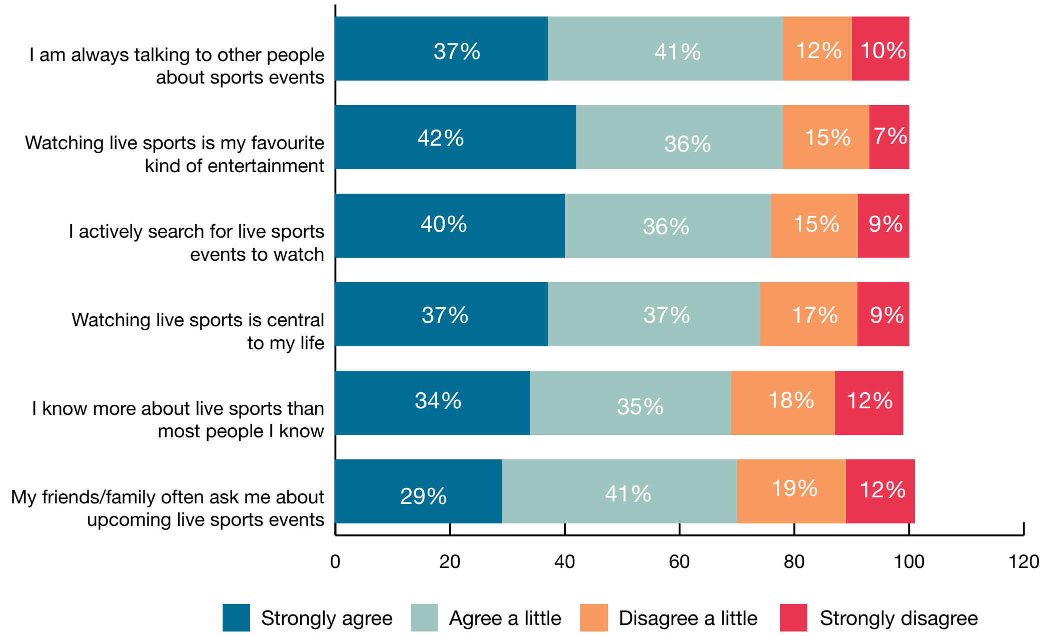
Base: n=5,004 (total sample)

To get a broader sense of **their passion for live sport**, respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their answers.

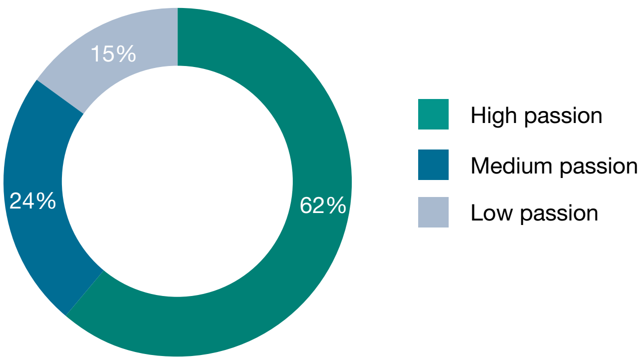
- **Approximately six in ten** (62%) displayed **high levels of passion for live sports**. This was most apparent among those aged 12-15 (72%) and 25-34 (71%) whose high passion levels were at least 10% higher than any other age group.

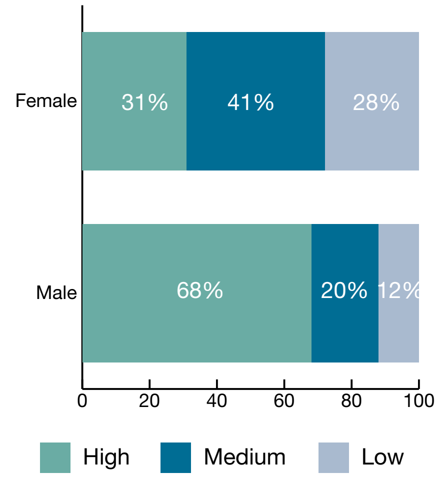
- While scores across all individual statements relating to sport were relatively high, the passion for live sports is perhaps most evident in the fact that "watching live sports is my **favourite** kind of entertainment" (77%) was the second most selected statement.

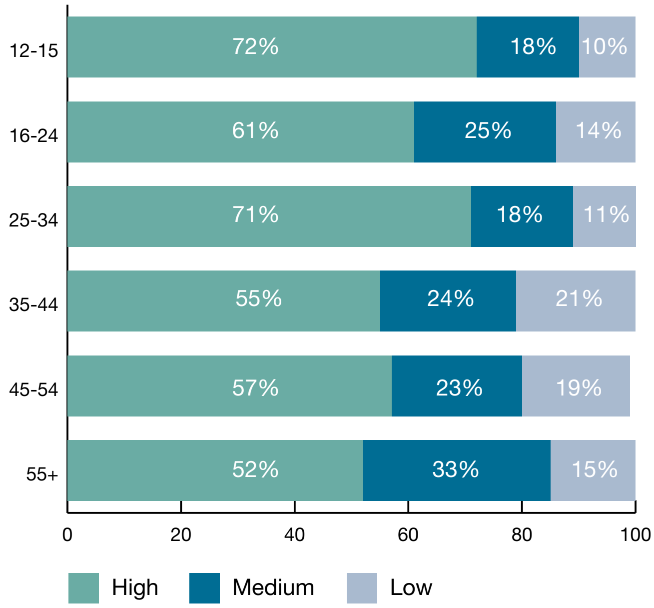
D2. To what extent do you agree or disagree that each of the following statements describe you?



Base: n=411 (streamed and/or shared live sports events in the past 3 months)





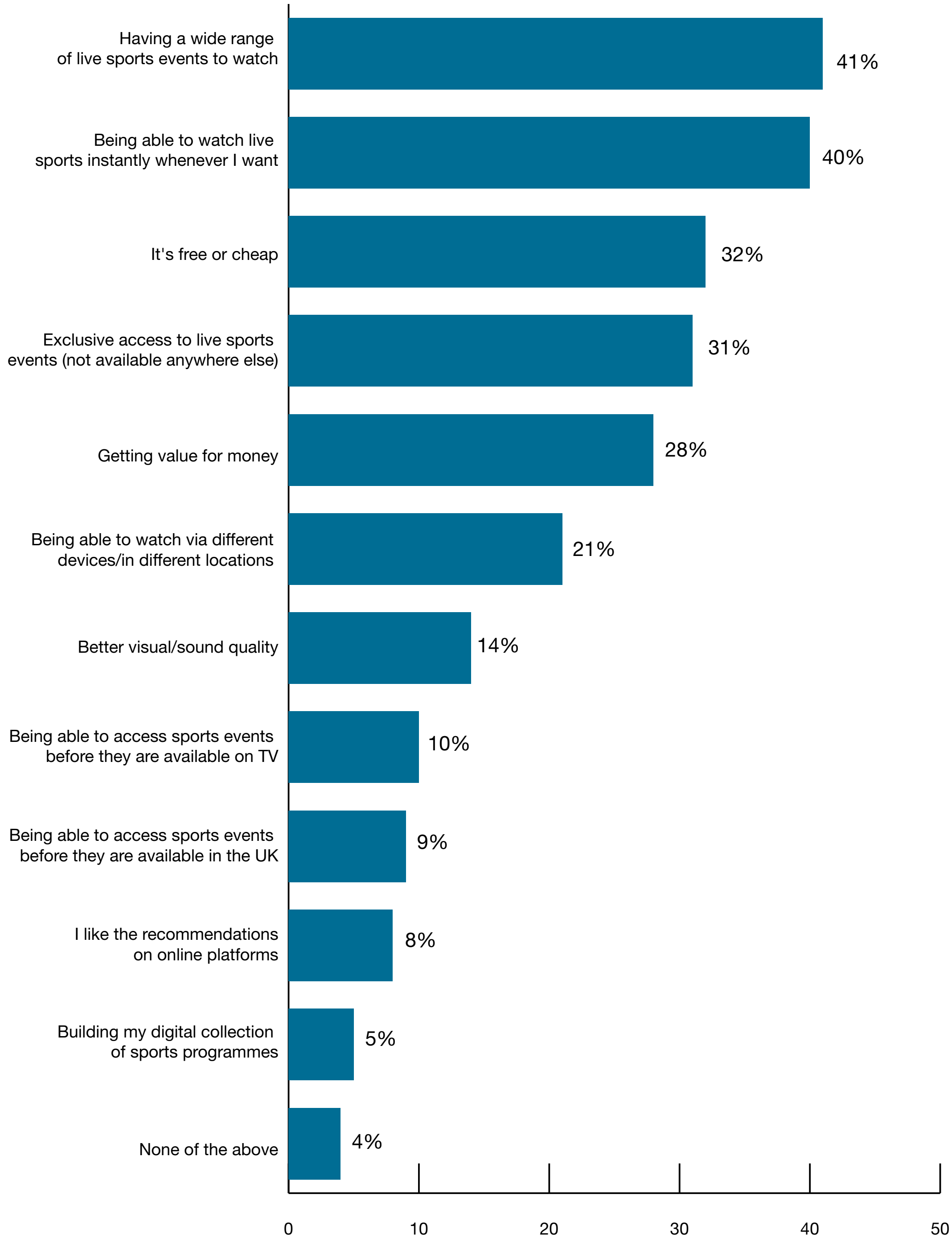


Understanding online consumption of live sport

To better understand the drivers of online consumption, those who had accessed live sports online in the previous 3 months were asked to select their top three reasons for doing so.

- While no single reason was selected more than half, a few dominant themes emerged.
- The **range of selection** and the **ease of access and convenience** were key factors with about four in ten selecting both “having a wide range of live sports events to watch” (41%) and “being able to watch live sports instantly whenever I want” (40%).
- The next most dominant themes relate to **cost/price** (“It’s free or cheap” 32% and “getting value for money” 28%) and access to **exclusive** content (31%).

D3. What are the main reasons that you choose to stream live sports events online? Please select your top 3.



Base: n=392 (downloaded or streamed live sports events in the past 3 months)

Male respondents	Female respondents
1. Having a wide range of live sports events to watch (43%) 2. Being able to watch live sports instantly whenever I want (41%) 3. It's free or cheap (32%)	1. Being able to watch live sports instantly whenever I want (37%) 2. It's free or cheap (32%) 3. Having a wide range of live sports events to watch (32%)
Aged 12-15	**Aged 16-24**
1. Having a wide range of live sports events to watch (66%) 2. Being able to watch live sports instantly whenever I want (29%) 3. Being able to watch via different devices/in different locations (26%)	1. Being able to watch live sports instantly whenever I want (50%) 2. Having a wide range of live sports events to watch (47%) 3. It's free or cheap (36%)
Aged 25-34	**Aged 35-44**
1. Being able to watch live sports instantly whenever I want (41%) 2. Having a wide range of live sports events to watch (34%) 3. Exclusive access to live sports events (not available anywhere else) (33%)	1. Having a wide range of live sports events to watch (41%) 2. Being able to watch live sports instantly whenever I want (40%) 3. Getting value for money (29%)
Aged 45-54	**Aged 55+**
1. It's free or cheap (38%) 2. Having a wide range of live sports events to watch (36%) 3. Being able to watch live sports instantly whenever I want (34%)	1. It's free or cheap (44%) 2. Being able to watch live sports instantly whenever I want (37%) 3. Exclusive access to live sports events (not available anywhere else) (37%)

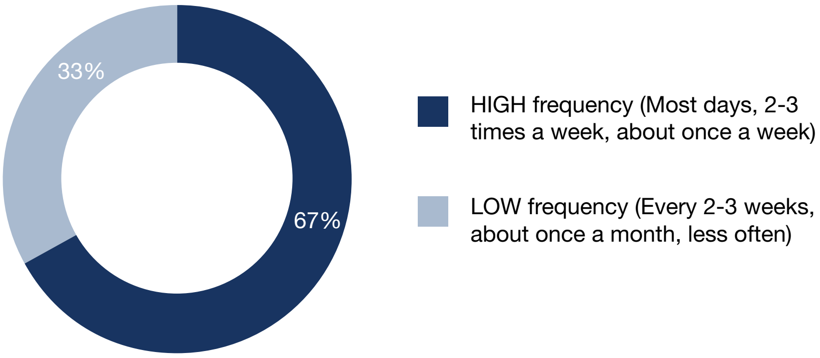
Streaming live sport events

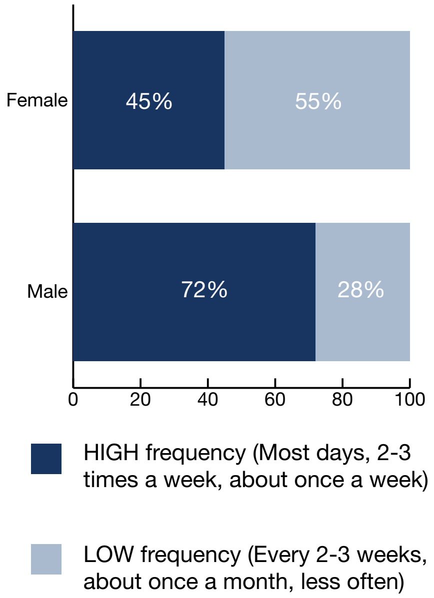
The 8% who had streamed live sport during the previous 3 months were asked more questions around frequency, volume and sources used.

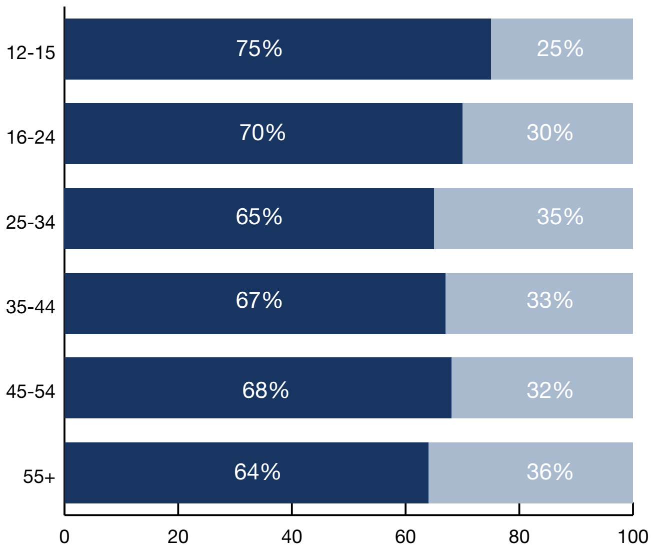
Frequency and volume of streaming live sports events

- Two thirds (67%) of those who had streamed live sport did so frequently (i.e. at least once a week). Approximately three quarters of male consumers of live sport did so frequently (72%, which is 28% more than female respondents).
- The number of hours spent streaming live sports events since COVID-19 had decreased for approximately two thirds (67%) of respondents. It had remained the same for approximately a fifth (22%) with very few (10%) saying it had increased.
    - Before COVID-19, respondents had streamed, on average, 38 hours of live sport every three months.
    - Over the previous three months the amount they had streamed had almost halved to an average of 22 hours.

D4. Generally, how often do you stream live sports events through the internet? (%)

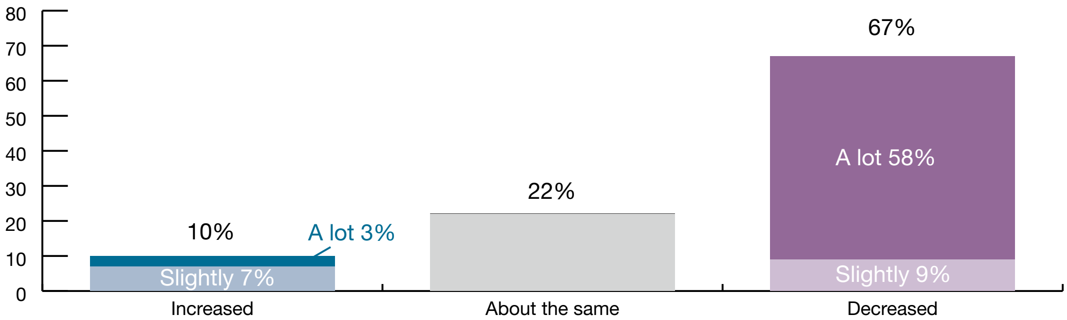






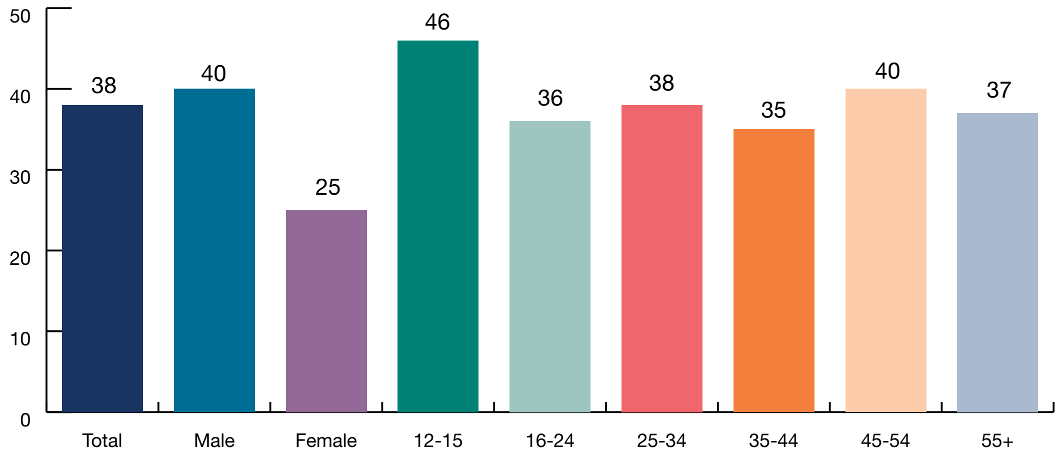
Base: n=392 (streamed live sports events in the past 3 months)

D5. Since the coronavirus (COVID-19) outbreak, would you say the number of live sports events you have streamed has?

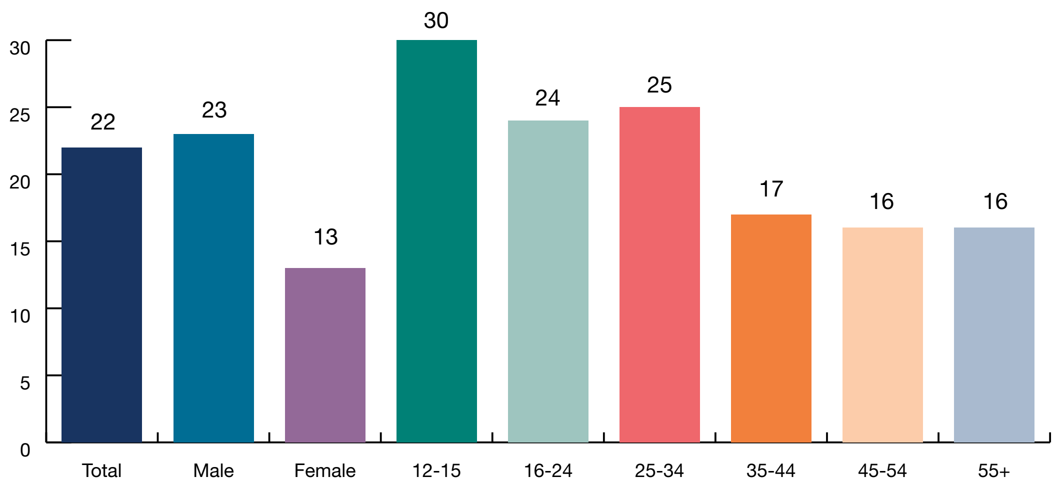


Base: n=392 (streamed live sports events in the past 3 months)

D6. Before the coronavirus outbreak, how many hours would you say you used to stream live sports events in a 3 month time period? (Average number of hours)



D7. In the past 3 months how many hours did you spend streaming live sports events through the internet? (Average number of hours)



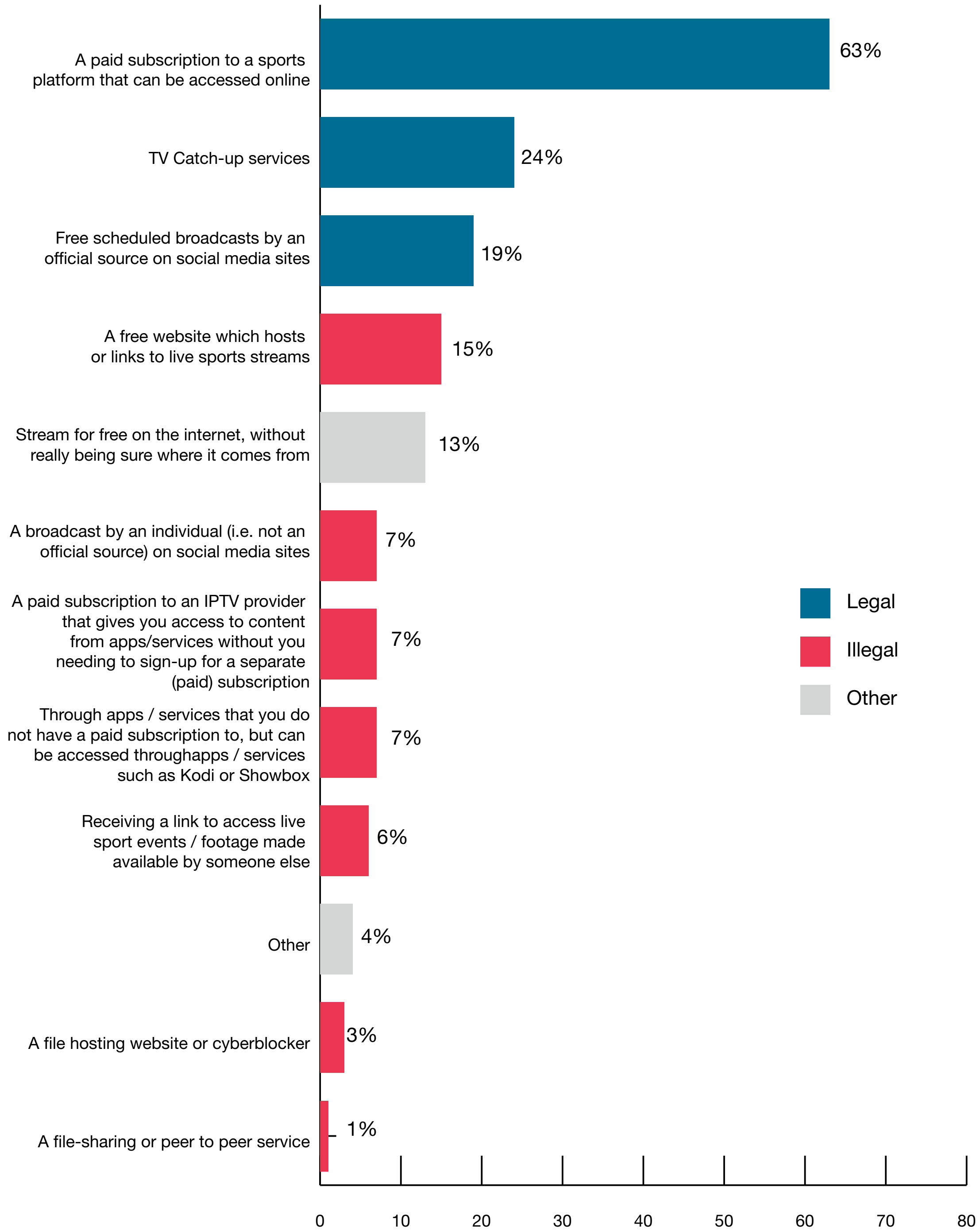
Base: n=321-365 (streamed live sports events in the past 3 months)

Sources of streaming live sports events

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could stream live sports. An 'unknown' option was also provided to serve as a catch-all for people who were unsure of the source.

- The most common source, by a significant margin, was *"A paid subscription to a sports platform that can be accessed online",* which was cited by nearly two thirds (63%) of live sports streamers.
- The next most common option was "TV Catch-up services", selected by around a quarter (24%).
- The most commonly used illegal method was using **"A free website which hosts or links to live sports streams", which was used by 15%**. No other illegal method was selected by more than 7% of respondents.

D8. Which of the following have you used to stream live sports events in the past 3 months? Please select all that apply (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
A paid subscription to a sports platform that can be accessed online	63%	61%	83%	69%	66%	59%	61%	47%
TV catch-up services	24%	26%	20%	19%	20%	21%	30%	39%
Free scheduled broadcasts by an official source on social media sites	19%	16%	23%	21%	20%	22%	17%	9%
A free website which hosts or links to live sports streams	15%	12%	15%	16%	13%	12%	13%	20%
Stream for free on the internet, without really being sure where it comes from	13%	11%	20%	13%	12%	9%	13%	14%
A broadcast by an individual (i.e. not an official source) on social media sites	8%	4%	6%	7%	10%	8%	11%	2%
A paid subscription to an IPTV provider that gives you access to content from apps/services without you needing to sign-up for a separate paid) subscription	7%	7%	9%	7%	9%	13%	4%	0%
Through apps/services that you do not have a paid subscription to, but can be accessed through apps/services such as Kodi or Showbox	7%	3%	11%	3%	2%	7%	13%	11%
Receiving a link to access live sport events/footage made available by someone else	6%	6%	3%	5%	6%	8%	6%	6%
Other	4%	4%	3%	3%	4%	3%	2%	7%
A file hosting website or cyberlocker	3%	4%	9%	1%	4%	1%	2%	3%
A file-sharing or peer to peer service	1%	1%	0%	0%	0%	3%	2%	3%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=392 (streamed live sports events in the past 3 months)

Stream for free on the internet, without really being sure where it comes from

Those unsure of the source of their live sports streams were asked, *in a new question this wave*, to explain more about how they accessed them in their own words.

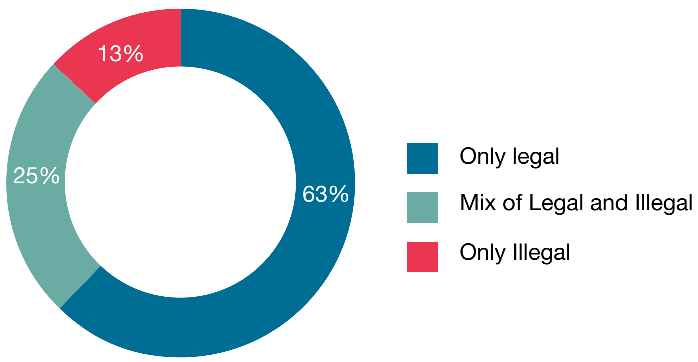
The most commonly used method, by far, was simply Googling the game/match they wanted to watch and finding links. A few also mentioned watching a game on the club's website.

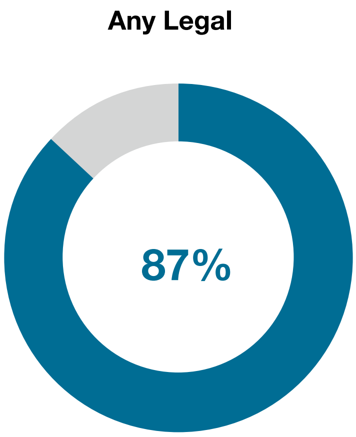
Legality of live sports streaming

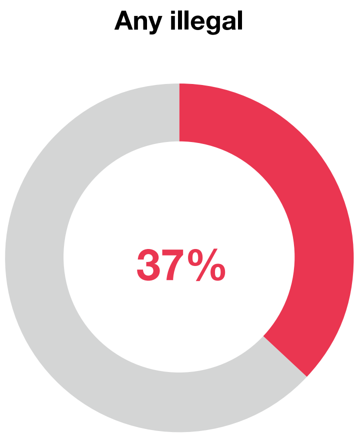
To better understand the distribution of sources across legal and illegal categories, those who had streamed live sport in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

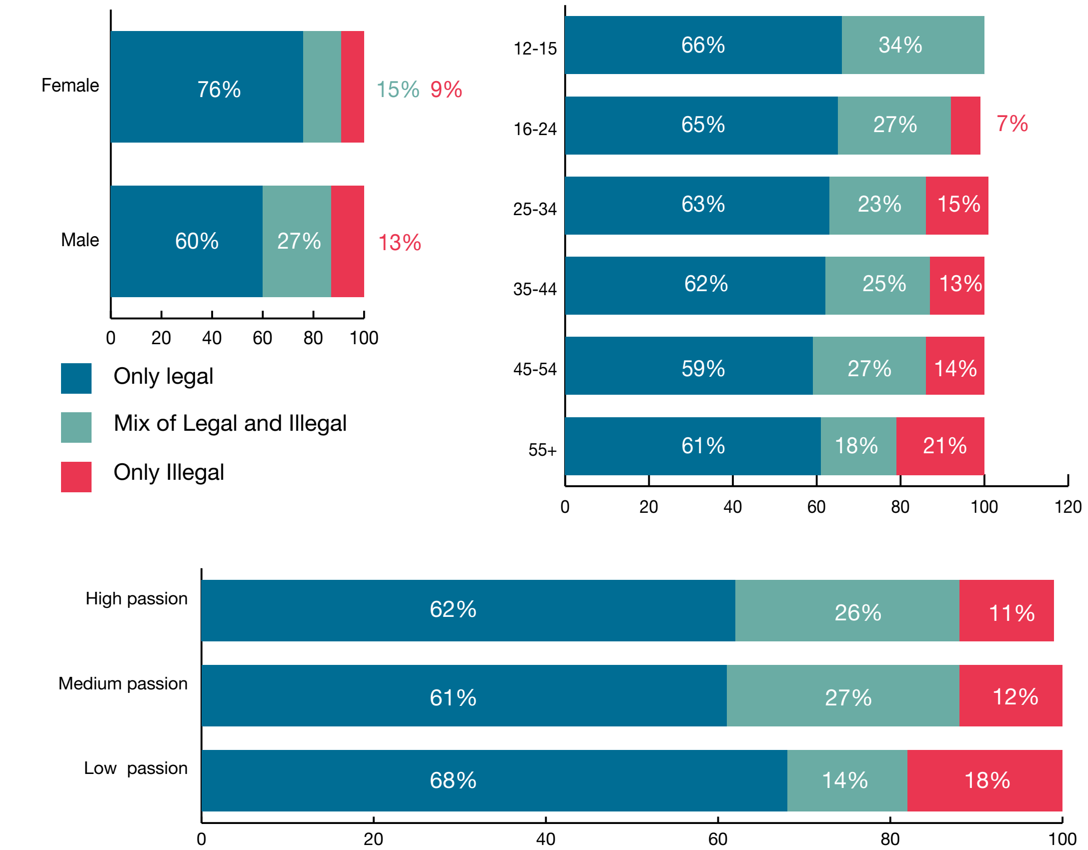
The answer option "download for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content in this way was not included in the base.

- Legal:
  - Overall 87% had used at least one legal source to stream live sport.
  - **63%** had used only legal sources.
- Illegal:
  - **37%** had used at least one illegal source to access live sport.
  - 13% had used illegal sources only to access live sport.
- Mixed:
  - 25% had used a mix of legal and illegal sources.









Base: n=363 (streamed live sport sevents in the past 3 months, with those who selected ‘other’ or ‘not sure of source’ removed)

D9. And how is the way you streamed live sports events typically split across the following sources?

Legality	Source	Average % of usage split	Average number of hours
Legal	A paid subscription to a sports platform that can be accessed online	51%	12
	TV catch-up services	11%	1
	Free scheduled broadcasts by an official source on social media sites	7%	1
Illegal	A free website which hosts or links to live sports streams	8%	2
	A paid subscription to an IPTV provider that gives you access to content from apps/services without you needing to sign-up for a separate (paid) subscription	4%	1
	Through apps/services that you do not have a paid subscription to, but can be accessed through apps/services such as Kodi or Showbox	3%	0
	A broadcast by an individual (i.e. not an official source) on social media sites	3%	1
	Receiving a link to access live sport events/footage made available by someone else	2%	1
	A file hosting website or cyberlocker	1%	0
	A file-sharing or peer to peer service	0%	0
Other	Stream for free on the internet, without really being sure where it comes from	7%	1
	Other	3%	0

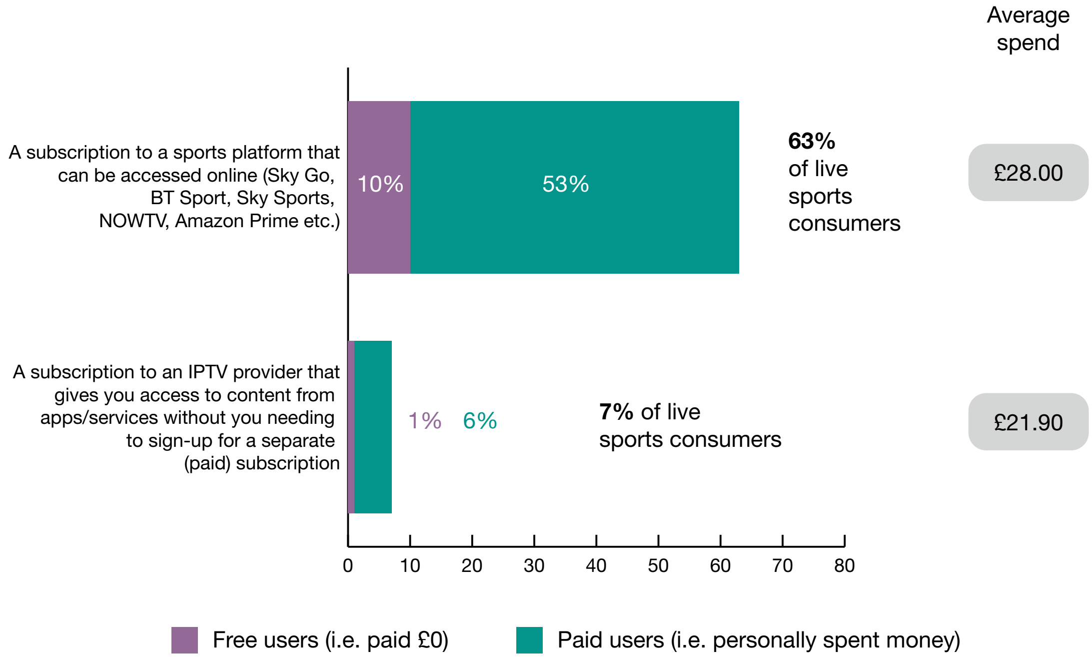
Base: n=321 (streamed live sports events in the past 3 months)

Paying for live sport

In a new question this wave, those who had used a paid source to stream live sport were asked how much they had personally spent on each source.

- Approximately two thirds (63%) of live sport consumers said they had used **a subscription to a sports platform** (e.g. Sky Go) in the previous three months, with most making a personal contribution towards a subscription (53% of live sport consumers). They spent, on average, £28.00 each month.
- A smaller proportion (7%) of live sport consumers had a subscription to an IPTV provider. They spent, on average, approximately £7 a month less than that spent on legal sources (£21.90 a month).

D10. Approximately how much do you personally spend each month on the below sources of streaming live sport? (Proportion of live sport consumers over past three months using a paid source and average amount spent each month by users of that source)



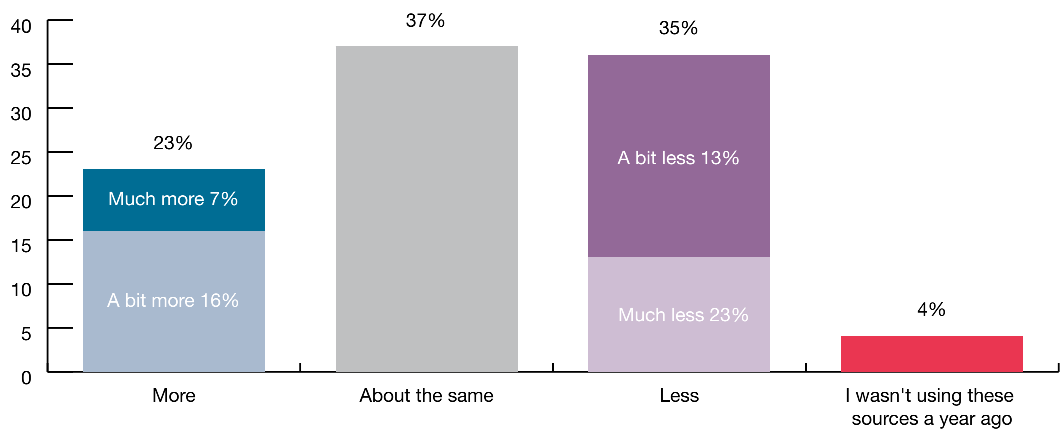
Base: n=392 (streamed live sport in the past 3 months)

Change in use of illegal sources

In a new question this wave, those who had used an illegal source to stream live sport were asked how the use of these sources compares to the same point a year ago.

- Respondents were fairly evenly split between those whose usage had remained the same (37%) and those whose use had decreased (35%). This was followed by those who said their usage was higher (23%) with a smaller number saying that they weren't using these sources a year ago (4%).

D11. Compared with the same point a year ago, would you say you are using those illegal sources...



Respondents whose usage of illegal sources had changed since the previous year were then asked a follow up open text question about the reasons for this change. Those who were using these sources **more** than they were a year ago highlighted three key reasons for this increase: **having more time** now to watch sport; **not wanting or being unable to pay** for a subscription to a sports channel and the **easy access to a wide range of content** that these sources enabled.

- *"I have a lot more free-time to watch sport now."* - Male, 25-34
- *"I cannot afford to subscribe to Sky/BT so use more of these sources."* - Male, 25-34
- *"There are more sports available and made easily accessible through these methods."* - Male, 25-34

Those who were using these sources **less** than they were a year ago almost unanimously said that it had been because there were **no live sports to watch**. Some also found that they had had less time to watch live sports and a few mentioned that they were watching more games using a particular (legal) method, and therefore had a reduced need to access content via these sources.

- *"There is no content being shown at the moment due to the current situation."* - Male, 55+
- *"There's no football to watch during the Coronavirus pandemic😭"* - Male, 25-34
- *"I do not have as much free time to watch sport at the moment."* - Male, 35-44
- *"More games are available to watch on BT TV now."* - Male, 16-24

Of the small proportion of respondents who had **started using** illegal sources since the same point last year, most mentioned that the cost of using official subscriptions was too high and therefore using illegal options were cheaper. A minority were simply trying these sources for particular **one-off events**.

Quotes

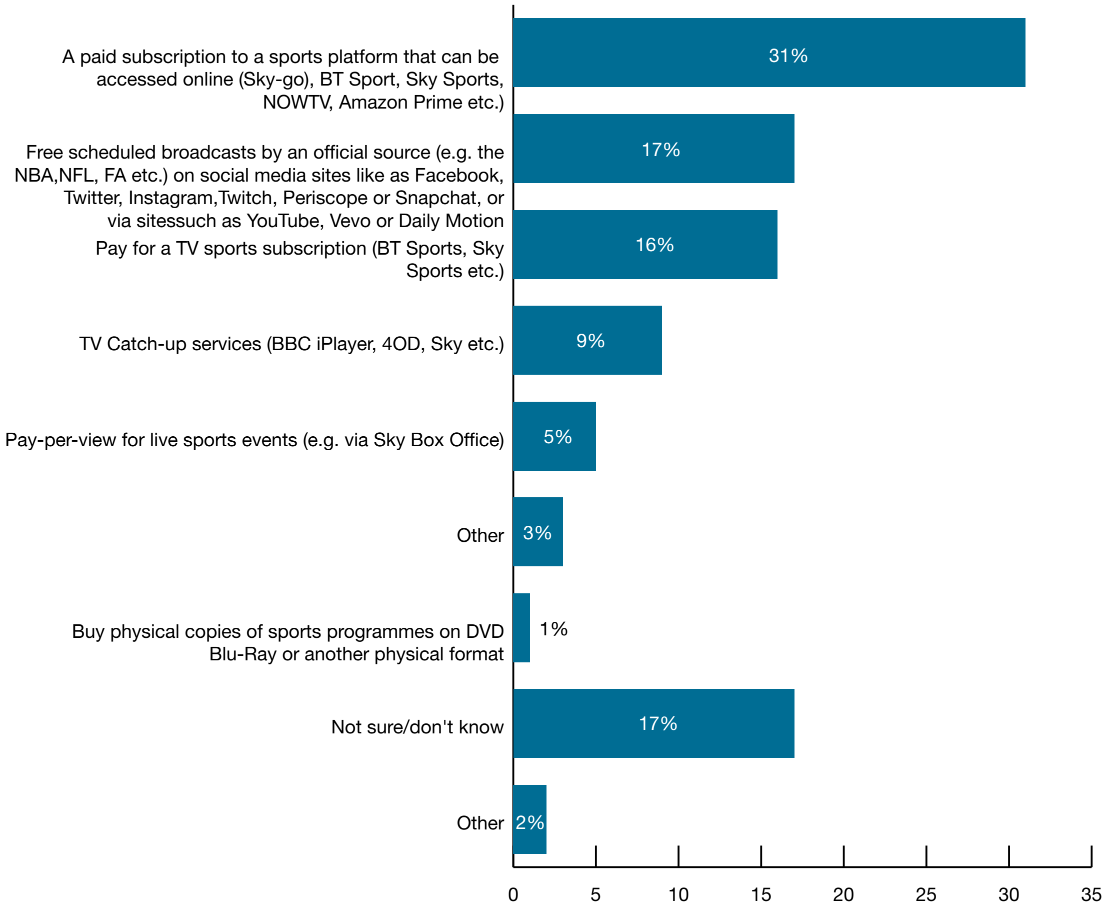
- *"The subscription fees to Sky Sports etc. are too expensive."* - Male, 55+
- *"(I use these sources so I can) watch live"* - Male, 25-34

Alternatives to infringement

Those who had used illegal sources to either download or stream live sport were asked which *single* legal source they would use if they could no longer access live sport illegally.

- Encouragingly, a paid option ("A paid subscription to a sports platform that can be accessed online") would be the preferred option at 31% and was the single most popular source. When combined, all paid options (including "pay for a TV sports subscription" and "pay-per-view") were selected by over half of respondents (53%).
- A high proportion of respondents (17%) were not sure or didn't know what they would do if illegal sources were no longer available.

D12. If live sports events were no longer available to stream via these illegal sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
A paid subscription to a sports platform that can be accessed online (Sky-go, BT Sport, Sky Sports, NOWTV, Amazon Prime etc.)	32%	19%	37%	34%	40%	37%	28%	8%
Free scheduled broadcasts by an official source (e.g. the NBA, NFL, FA etc.) on social media sites like as Facebook, Twitter, Instagram, Twitch, Periscope or Snapchat, or via sites such as YouTube, Vevo or Daily Motion	16%	25%	27%	25%	9%	14%	22%	13%
Pay for a TV sports subscription (BT Sports, Sky Sports etc.)	17%	7%	9%	23%	12%	11%	22%	17%
TV Catch-up services (BBC iPlayer, 4OD, Sky etc.)	8%	19%	0%	8%	6%	11%	11%	16%
Pay-per-view for live sports events (e.g. via Sky Box Office)	6%	0%	9%	5%	9%	5%	0%	4%
Buy physical copies of sports programmes on DVD, Blu-Ray or another physical format	1%	6%	8%	0%	3%	0%	0%	0%
Not sure/don't know	17%	19%	10%	4%	15%	22%	12%	37%
Other	2%	7%	0%	0%	6%	0%	6%	4%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=136 (streamed and/or downloaded live sports events illegally)

Qualitative insights

Although some respondents were fairly apathetic towards live sports, those who were passionate about live sports had really **felt its absence** during lockdown - particularly its **unpredictable** and **exciting** nature, which was hard to find in other forms of entertainment. A few football fans in particular were missing the sense of belonging and camaraderie which they felt when watching their team play. Additionally, for some, live sport acted as an **indicator of normality** as it was so ingrained in their routines and not having this made the reality of the circumstances brought on by COVID-19 seem starker. The cancellation of the Olympics had also been **disappointing** for some who had been looking forward to the event.

- *"I always used to watch football at the weekend and sometimes in the week, as well as NBA and NFL when it was on. I feel a little empty, like there is something missing and often have evenings where I am a little bored of watching TV or reading, and just want to watch something unpredictable."* - Male 25-34

- *"I miss watching football being live at the stadium or on Sky Sports or BT Sport. My Saturdays are not the same without following my team (Manchester United)."* - Male 35-44

- *"I've been a little discouraged without being able to watch live sports due to the pandemic."* - Male, 35-44

- *"Not having live sports has obviously been difficult as it is breaking up the norm of what I would normally do."* - Male 25-34

- *“Usually I would have almost no interest in watching sports, but I love certain sports in the Olympics… I haven’t been impacted much by the lack of live sports, although I’m disappointed that the Olympics won’t be on.”* - Female, 25-34
- *“The only live sports I really watch is boxing with my hubby. I have missed it, the excitement and the anticipation of who would win.”* - Female, 45-54
- *“Not having my favourite live sports available at the moment has impacted me quite a lot, as I only have a few things in life that I enjoy, and motor racing is one of them. I feel sad and lost without it.”* - Male, 35-44

In the place of live sports, respondents had pursued **alternatives.** Among these were watching **live sports from other countries** and watching **re-runs** online. Although these were considered better than nothing, most respondents found that the experience was not quite the same, as, in the case of foreign leagues (e.g. the Bundesliga), they had **no emotional investment** in the teams/players and in the case of re-runs there was **no element of surprise.** For these reasons, some refused to engage with these alternatives entirely. The absence of a social element and lack of ‘atmosphere’ also left some respondents feeling disappointed.

- *“I don’t watch the reruns because I know the outcome. No suspense, no surprises. Not on the edge of my seat.”* - Male, 45-54
- *“The impact of not having live UK horse racing has been that I have followed some USA horse racing tipsters instead.”* - Male, 25-34
- *“This has led me to watching re-runs on YouTube and ones I have recorded. Luckily with the weather being ok, I have been pottering about in the garden more.”* - Male, 35-44
- *“Having no live sport hasn’t really affected me in any way. I can’t say the same for my partner. He lives for football and F1. To plug the gap, we just tend to watch movies instead or he likes his YouTube for old highlights.”* - Female, 25-34

Some had also begun watching e-sports or playing video games themselves in order to replicate the **spontaneity** and **competitiveness** of live sport, while others turned to entirely different kinds of entertainment to fill the time, such as TV or films.

- *“As a result of no sports I have got more into e-sports and playing more computer games more regularly, watching matches on Twitch. I have found myself using more mobile gaming platforms and re-visiting classic games as well.”* - Male 35-44
- *“I have had to find other entertainment such as video games.”* - Male, 35-44
- *“Having little or no live sport has meant that I have had to seek YouTube to watch either e-sports, like FIFA home challenges or F1 eSports to pass the time. I’ve also watched classic F1 and classic Newcastle matches on their official YouTube pages as a way to get through these tough times.”* - Male, 25-34
- *“I have watched more TV shows on Netflix because of no live sports.”* - Male 35-44
- *‘I have filled the time that I usually watch live sports watching more food programs and more TV series.”* - Female, 45-44

The prospect of live sports returning in some form was exciting, and even more so for those who were aware of plans for their preferred sport(s) to come back. Some saw this as a reassuring sign of **things returning to normal** more broadly. Football fans who had heard that Premier League games would be shown on free-to-air television and through certain subscriptions were particularly welcoming of this increased availability and access.

- *"Of course, in recent weeks, there's been news that both F1 and Premier League football is coming back in 2-3 weeks and certainly in football terms, there will be live football of all games, either on free-to-air or on subscription, which will be a welcome thing."* - Male 25-34

- *"I have heard of the dates live sport will return and have been watching the Bundesliga recently and look forward to seeing La Liga return this week alongside the Premier League and Football League next week. I feel it is a welcome relief and a good way to edge a return back to normal for the UK's fans."* - Male 25-34

- *"I cannot wait till football resumes, not only does it give me some excitement, but we can officially finish the season and see how my team ends up."*- Male 35-44

- *"I am happy to hear that it'll be starting back soon and I'm looking forward to being able to watch the team I support again."* - Female, 16-24

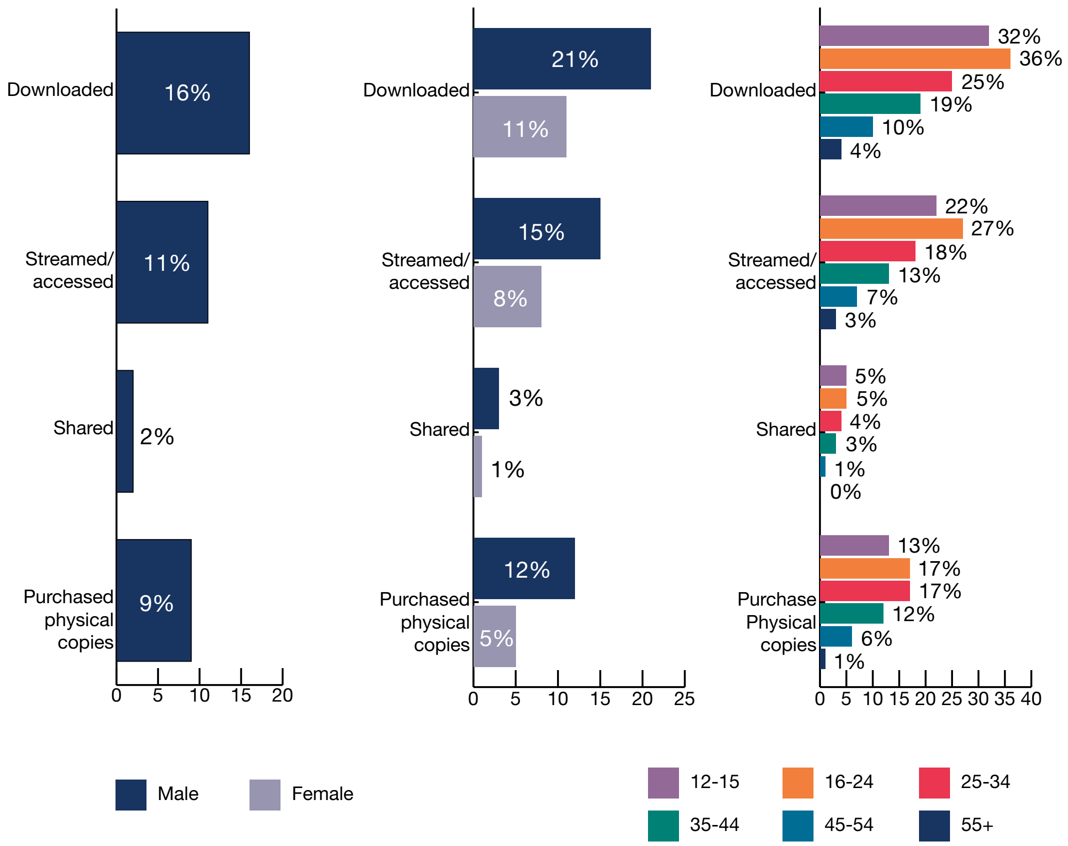
- *"I have heard that they may be looking at live matches and races without spectators which is encouraging."* - Female, 25-34

Engaging with video games

24% had engaged with video games in the previous 3 months (i.e. either by downloading, streaming, sharing or purchasing physical copies).

- **Downloading** was the most common means of accessing video games (16%).
- Purchasing video games in **physical formats was also common,** with 9% having bought them.
- **Men and younger people** were more engaged with video games. Most notably, around a third of 12-24 year olds (32% of 12-15, 36% of 16-24) had downloaded video games in the previous 3 months and approximately a fifth of those aged 12-34 (13% of 12-15, 17% of 16-24, 17% of 25-34) had purchased via physical formats.

E1. Have you downloaded/streamed/shared[6]/purchased physical copies of Video Games in the past 3 months?



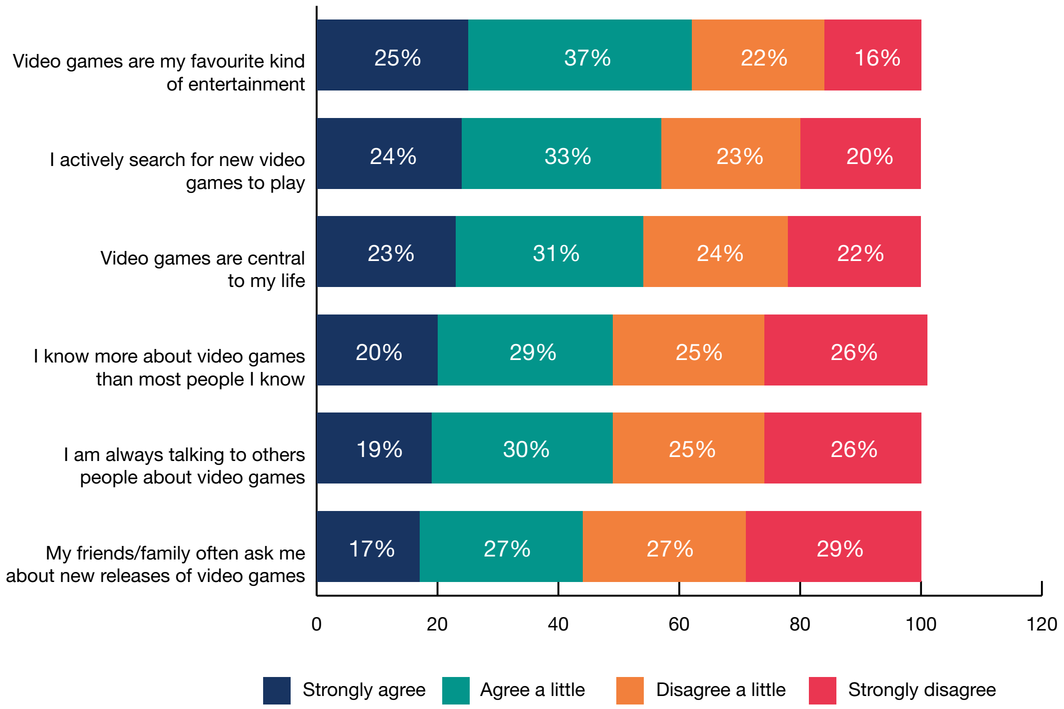
Base: 2020 n=5,004 (total sample)

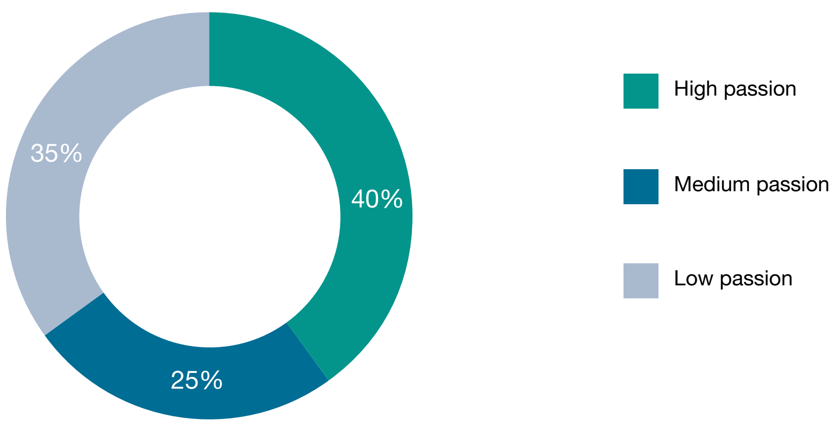
6 The definition of 'shared' was provided as: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in the answer option."*

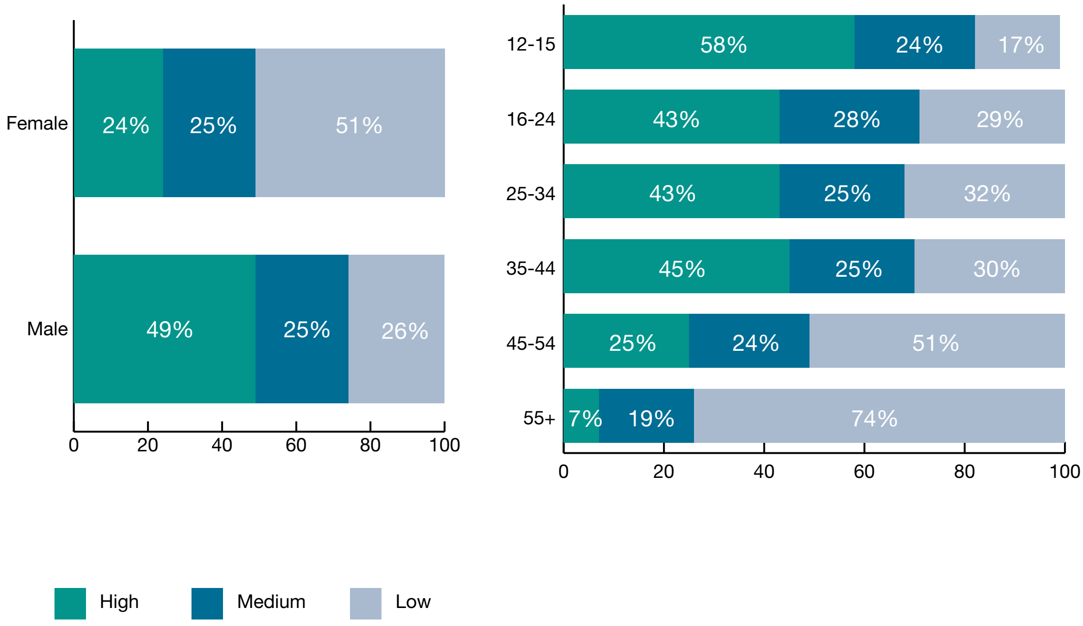
To get a broader sense of **their passion for video games**, respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

- Four in ten (40%) displayed a **high passion** for video games.
- Those with a high passion for video games were more likely to be male (49% compared with 24% of females) and to be younger (at least 43% of those aged between 12-44.)
- Looking at individual statements, the **importance** of video games in their lives is evident with them most likely to agree with that "video games are my favourite kind of entertainment (62%). **Discovery** was also key with 57% agreeing that "I actively search for new video games to play".

E2. To what extent do you agree or disagree that each of the following statements describe you?







Base: n=1,209 (downloaded, streamed, shared and/or purchased physical copies of video games in the past 3 months)

Qualitative insights

The qualitative discussions highlighted that, although video games were **highly valued** by respondents, **engagement with them was varied**. Some considered them a top daily entertainment source, while others, although they enjoyed them, engaged more casually. Respondents enjoyed how video games helped them to **pass the time**, **relax** and experience things they typically **wouldn't be able to do in real life.**

- *"Gaming is really important to me as it really helps when I get bored."* - Male, 16-24
- *"I like gaming because it keeps me at home and it can make a boring day less boring. It is another way to pass time if you are doing nothing - gaming is entertaining. It gives you an opportunity to do things you won't be able to do in real life."* - Male, 16-24
- *"Always a fan of retro video games like Rayman, Crash and Sonic but do like Halo and FIFA too. I find it a way to relax."* - Male, 25-34

For many, gaming had played an **extremely important** role during the COVID-19 pandemic and lockdown. The **distraction they provide from daily life** was perhaps the most significant benefit, however, respondents also mentioned how games had helped them **bond** with other family members and **stay connected** with friends.

- *"Gaming has played an important role in helping keep my sanity for both me and my son and has also helped us bond through doing something together."* - Male, 35-44
- *"I only really have one close friend and he lives far from me, so we've always had an online friendship. We contact each other through Facebook Messenger and we play Xbox together. He's a huge help. I have a few other friends I play Xbox with too and we talk most days."* - Female, 16-24
- *"Whenever I am playing video games it helps me to slightly forget about the pandemic and the worries. It temporarily switches you off from the crisis while you don't know when the lockdown will end. Video games serve as a companion during the crisis."* - Male, 25-34

- *"I am sure many parents are also grateful for online games and entertainment to keep their children occupied during lockdown."* - Female, 55+

- *"I think being able to play games has helped me the most during lockdown as it takes hours away without you noticing."* - Male, 16-24

Generally, respondents felt they were spending **more time playing video games** now than before lockdown - largely because they had more time available, which would previously have been spent on other activities, such as going out socialising. Although respondents anticipated a slight reduction in time spent playing after lockdown, most still expected to be spending a great deal of time playing video games.

- *"Looking back before lockdown I am playing this much more now but that is due to nothing else to do and the boredom of the continuous loop."* - Male, 35-44

- *"I reckon I am playing more video games more than I was before lockdown, simply because I could go outside to socialise with friends. I think my habits of doing online gaming will reduce slightly by an hour or two once lockdown measures are eased but I think I will still play a reasonable amount if I feel bored."* - Male, 25-34

- *"I have definitely played video games for more hours since lockdown started, but I played a lot before too."* - Female, 45-54

As a result of spending more time playing games, respondents were often seeking out **more new content.** Additionally, having extra time on their hands was leading some to search for and learn about games to fill the time, with **no real intention of buying** them.

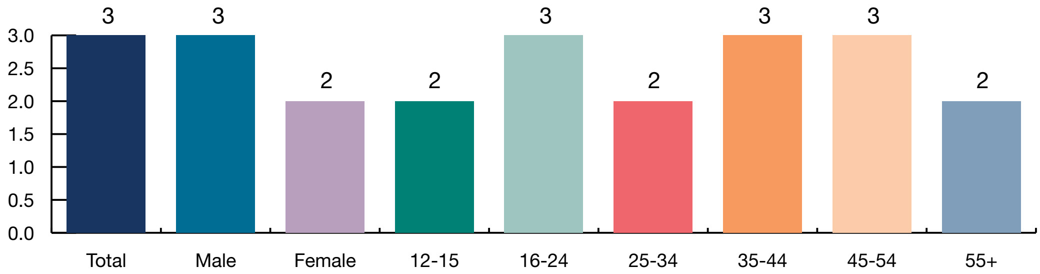
- *"I think I have searched more for video games, but this is down to boredom and the fact we spend much more time at home."* - Male, 35-44

Physical purchasing of video games

The 9% of respondents who had purchased video games in physical formats, such as cartridges or discs, during the previous 3 months were asked more questions around frequency and number of purchases made.

- There was little variation in the number of physical video games purchased across different genders and age groups, with an average of 2-3 purchases made in the previous three months.

E3. In the past 3 months how many Video Games have you purchased physical copies of? (Average purchases)



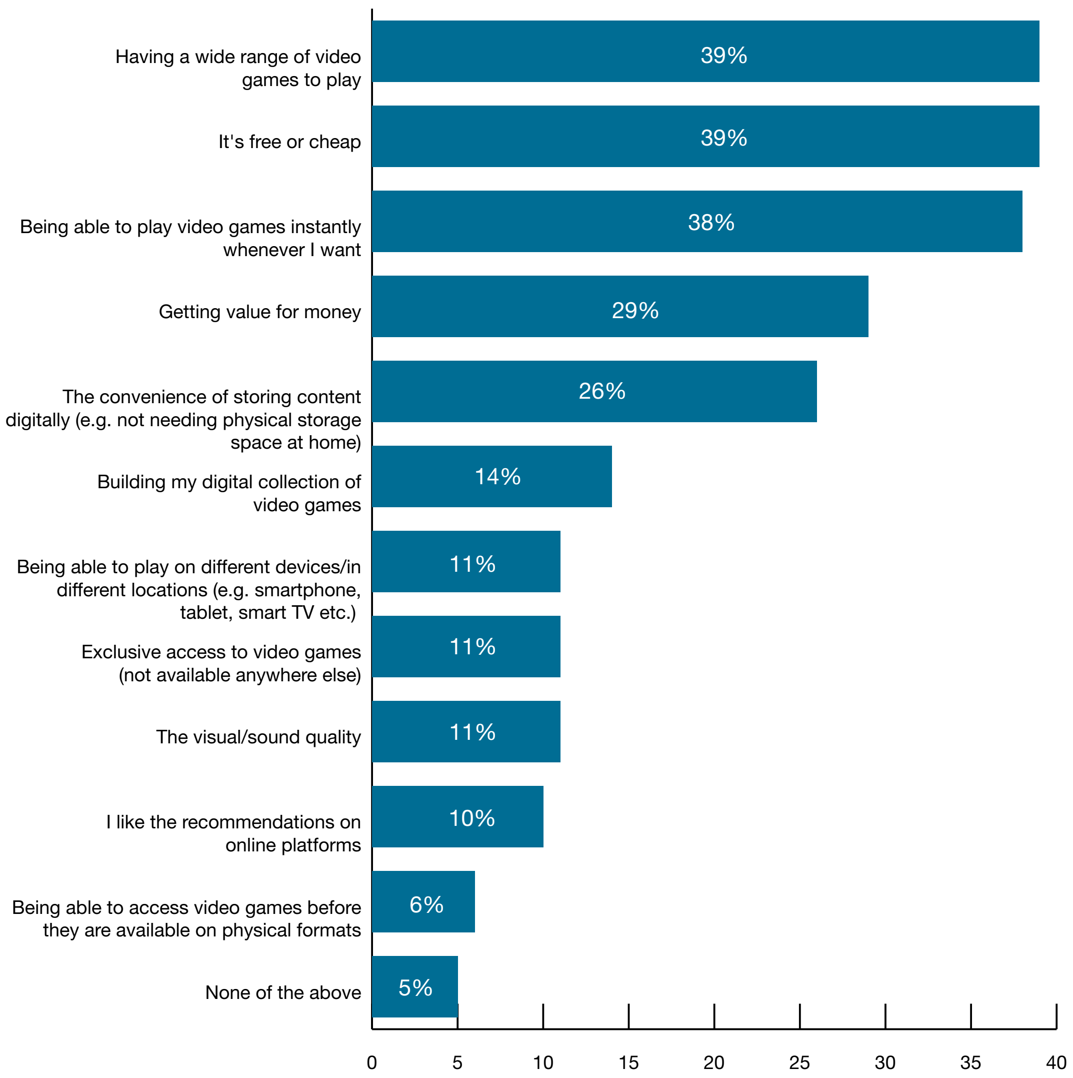
Base: n=432 (purchased physical copies of video games in the past 3 months)

Understanding online consumption of video games

To better understand the drivers of online consumption, those who had accessed video games in the previous 3 months were asked to select their top three reasons for doing so.

- Three reasons emerged as being central to why people access video games online. These related to having a **wide range** available ("having a wide range of video games to play" 39%), **cost** ("it's free or cheap" 39%) and **convenience/ease of access** ("being able to play video games instantly whenever I want" 38%).
- Cost appeared to be even more of a driver for women, with 48% selecting "it's free or cheap", compared to 33% of men.

E4. What are the main reasons that you choose to access video games online (i.e. downloading or streaming)? Please select your top 3. (%)



Base: n=1,107 (downloaded or streamed video games online in the past 3 months)

Male respondents	Female respondents
1. Having a wide range of video games to play (40%) 2. Being able to play video games instantly whenever I want (36%) 3. It's free or cheap (33%)	1. It's free or cheap (48%) 2. Being able to play video games instantly whenever I want (43%) 3. Having a wide range of video games to play (36%)
Aged 12-15	**Aged 16-24**
1. Having a wide range of video games to play (45%) 2. Being able to play video games instantly whenever I want (41%) 3. It's free or cheap (38%)	1. Having a wide range of video games to play (43%) 2. Being able to play video games instantly whenever I want (39%) 3. It's free or cheap (36%)
Aged 25-34	**Aged 35-44**
1. Being able to play video games instantly whenever I want (39%) 2. It's free or cheap (38%) 3. Having a wide range of video games to play (31%)	1. It's free or cheap (40%) 2. Having a wide range of video games to play (33%) 3. Getting value for money (33%)
Aged 45-54	**Aged 55+**
1. It's free or cheap (53%) 2. Being able to play video games instantly whenever I want (41%) 3. Having a wide range of video games to play (41%)	1. It's free or cheap (59%) 2. Being able to play video games instantly whenever I want (41%) 3. Having a wide range of video games to play (31%)

Qualitative insights

Online methods of access were the **default** for most respondents, with purchasing physical copies generally being viewed as **outdated** and **inconvenient.**

- *"For me owning the actual copy is in the past and streaming is the way to go."* - Male, 35-44
- *"I would be happy to purchase a game if I really liked it. I am definitely not looking to buy hard copies so it would be streaming or downloading on my laptop or phone."* -Female, 35-44
- *"By having Steam, I wouldn't have to worry about buying hard copies of games like you would for Xbox or PlayStation as Steam gives you activation codes to use when purchasing a game on Steam or on Amazon."* - Male, 25-34

The **range of content available, low/no cost, having instant access** and **the convenience** of having a **permanent digital library** to store games were particularly valued benefits of using online methods of acquiring games.

- *"The games are stored on your account forever and you can play them at any time. If you have a new computer you can then download the main Steam app and reinstall the games from your account."* - Male, 25-34
- *"I use online market place a lot for games because I cannot lose them."* - Male, 16-24
- *"The main thing is that its free and I don't like spending if I don't have to."* - Female, 35-44

Although a few purchased physical copies of games from time to time, they tended to do so via an online marketplace, rather than in a physical store.

- *"I choose Amazon UK because it is convenient and I can get games both for gaming console and PC. I can find any game I want."* - Male, 25-34

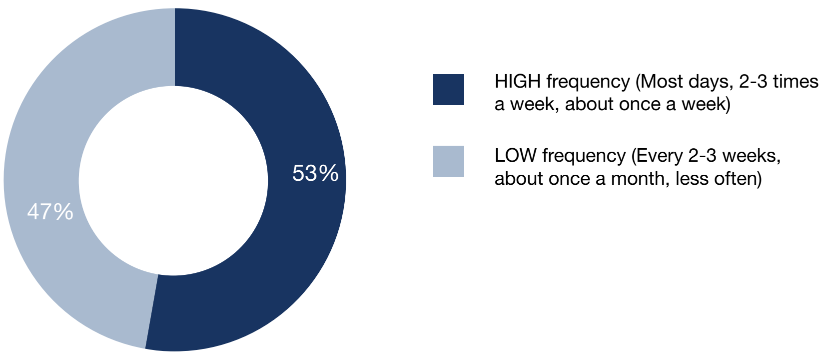
Accessing video games online

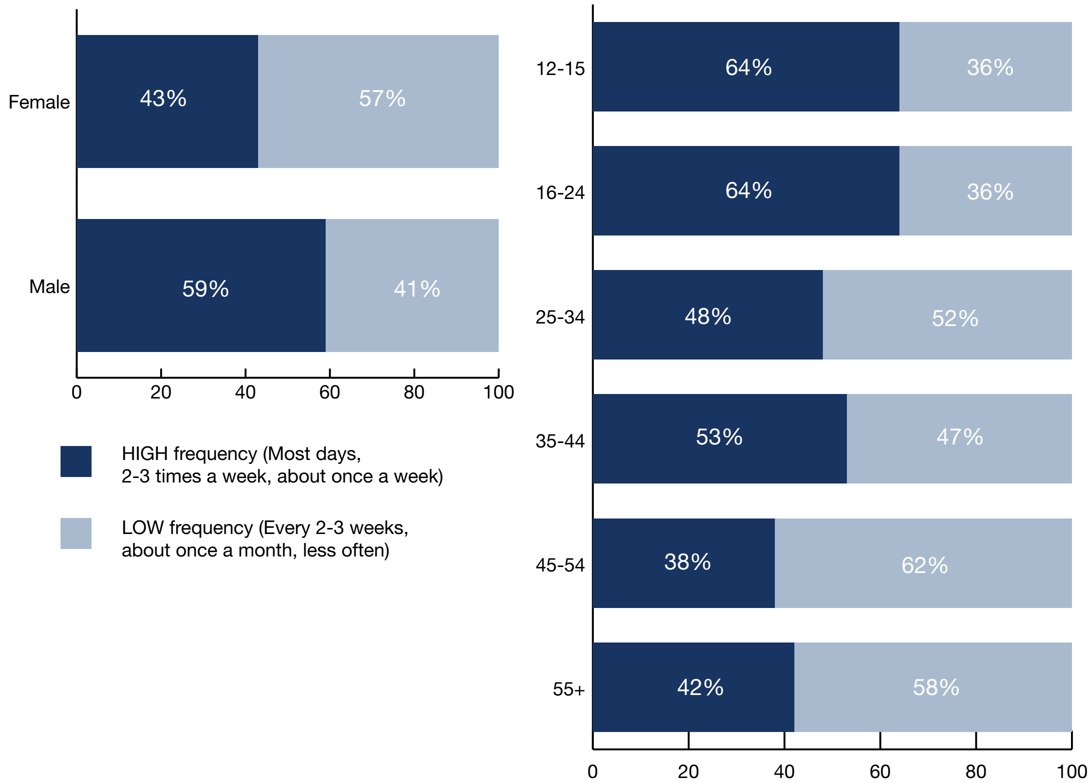
The 20% who had accessed video games online during the previous 3 months were asked more questions around frequency, volume and sources used.

Frequency and volume of accessing video games

- Broadly, there was an equal **split** between those who access video games online weekly (53%) and those who access less often (47%).
- Weekly access was more common among men than women, and those aged 12-24 compared to older groups.
- The amount of video games downloaded/accessed since COVID-19 had increased for four in ten (41%). It was unchanged for over half (54%) with very few (6%) saying it had decreased.
    - Before COVID-19 respondents had downloaded/accessed, on average, 14 video games every three months.
    - During the previous three months the amount they had downloaded/accessed had increased to, on average, 20 video games.
    - This increase was largest among those aged 16-24 where it grew by 9 additional games to 28 games accessed over three months.

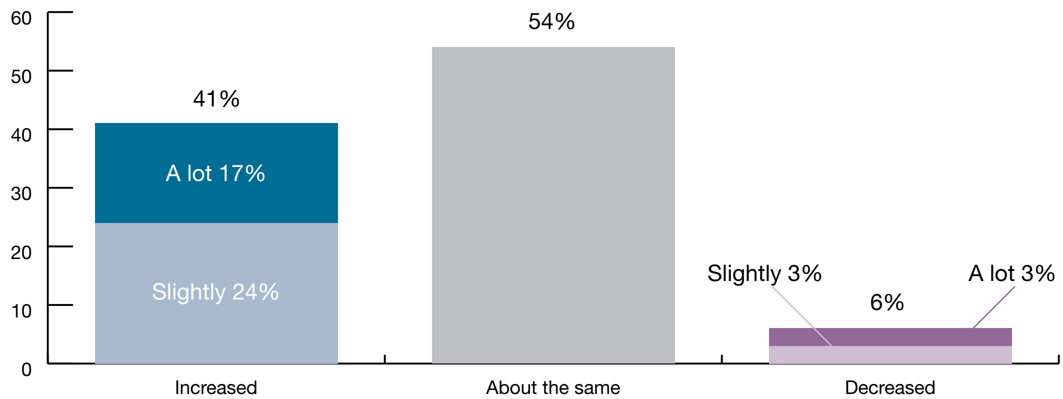
E5. Generally, how often do you download or stream/access video games through the internet? (%)





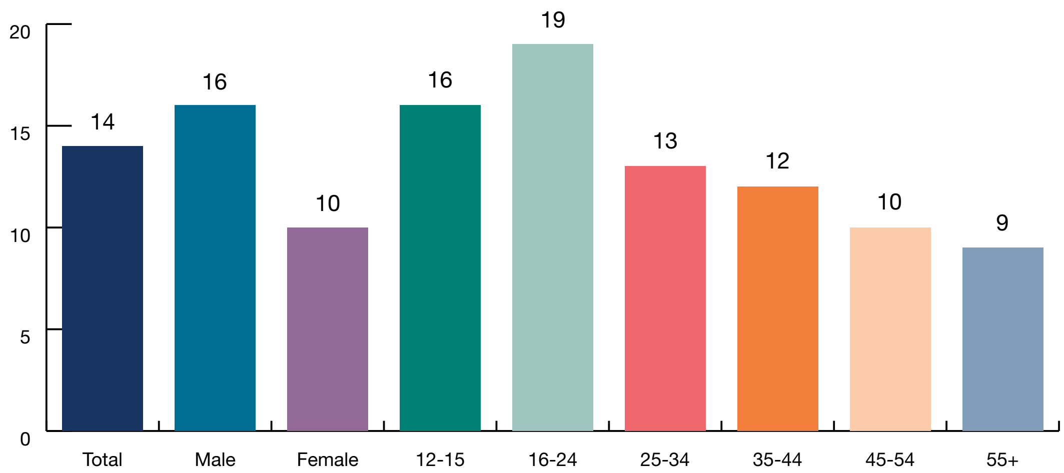
Base: n=1,107 (downloaded or streamed/accessed video games in the past 3 months)

E6. Since the coronavirus (COVID-19) outbreak, would you say the number of video games you have downloaded/accessed has?

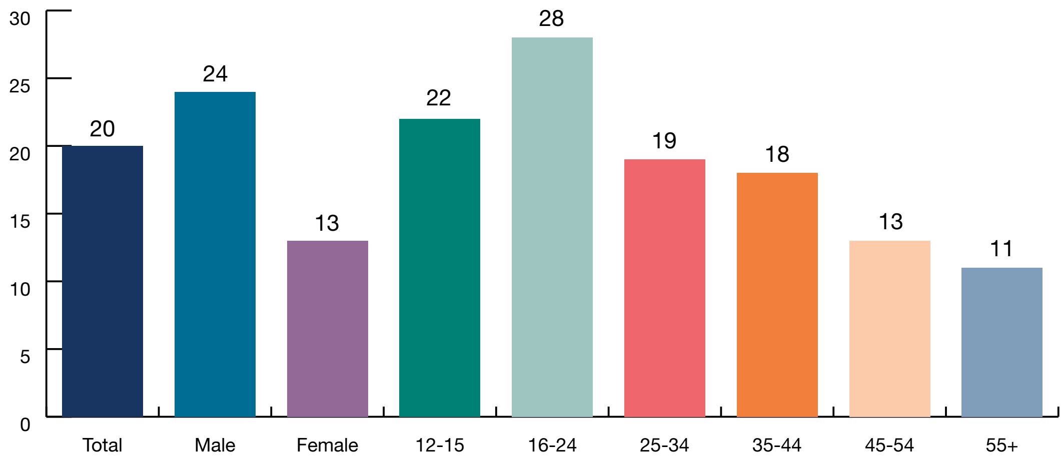


Base: n=1,017 (downloaded or streamed/accessed video games in the past 3 months)

E7. Before the coronavirus outbreak, how many video games would you say you used to download/ access in that same 3 month time period?



E8. In the past 3 months how many Video Games have you downloaded/streamed through the internet? (average number of downloads)



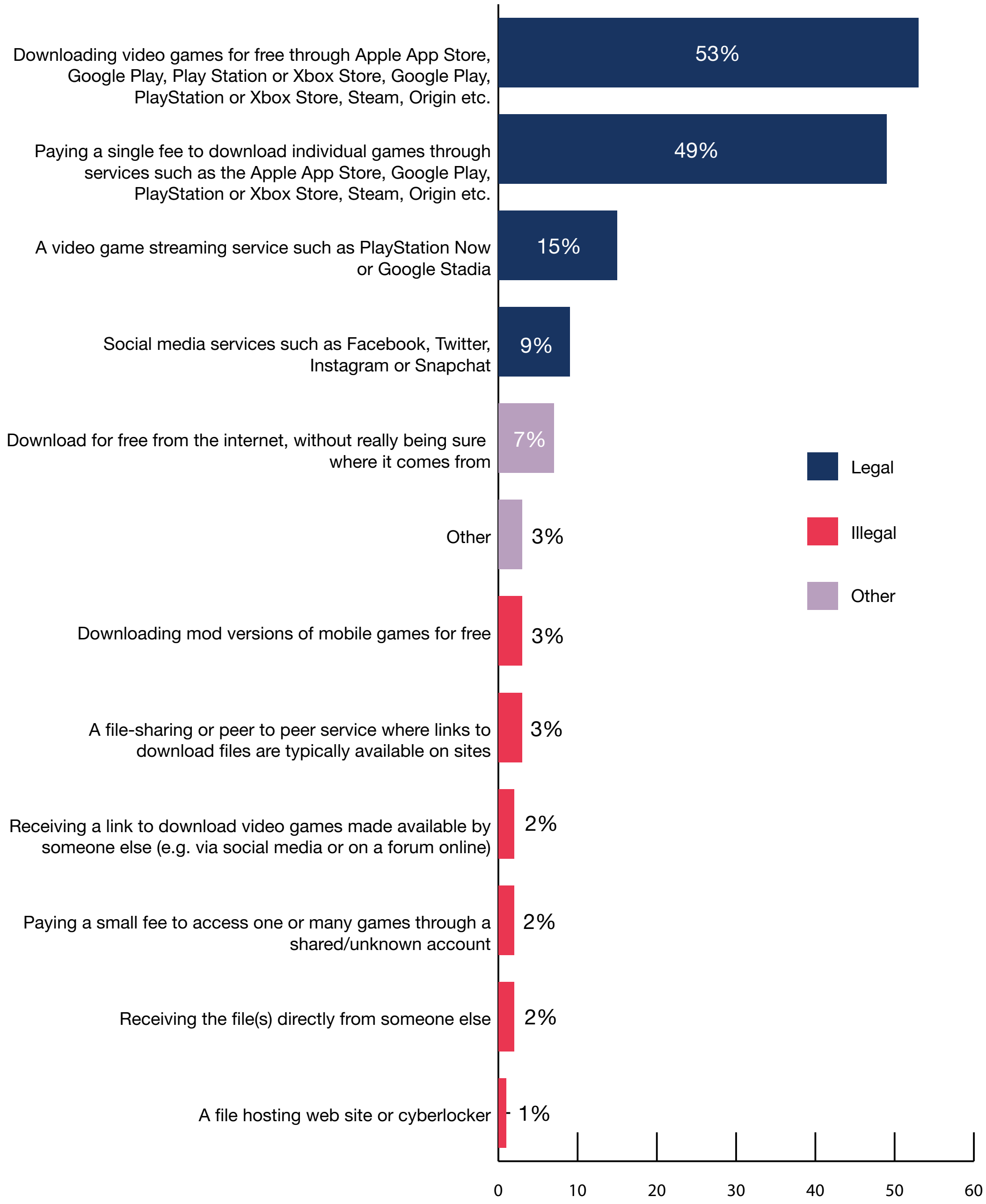
Base: n=1,001 (downloaded/streamed video games in the past 3 months)

Sources of downloading and streaming/accessing video games

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could access video games. An 'unknown' option was also provided to serve as a catch-all for people who were unsure of the source.

- The **two sources that had the largest use were both legal**, with one being free ("Downloading video games for free through Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin" 53%) and one being paid ("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" 49%).
- No illegal sources were selected by more than 3% of online video gamers.
- Although overall just a small proportion (7%) were unsure of the exact source used, almost a fifth (19%) of those aged 55+ selected this.

E9. Which of the following have you used to download/stream video games in the past 3 months? (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
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.	53%	40%	49%	61%	54%	51%	29%	20%
Downloading video games for free through Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc.	52%	54%	55%	57%	51%	45%	60%	53%
A video game streaming service such as PlayStation Now or Google Stadia	16%	11%	22%	14%	14%	21%	7%	4%
Social media services such as Facebook, Twitter, Instagram or Snapchat	8%	11%	8%	8%	8%	6%	14%	18%
A file hosting website or cyberlocker	2%	1%	2%	2%	1%	1%	0%	0%
A file-sharing or peer to peer service where links to download files are typically available on sites	3%	2%	5%	2%	2%	4%	2%	1%
Receiving the file(s) directly from someone else	2%	1%	5%	1%	1%	2%	1%	1%
Receiving a link to download video games made available by someone else (e.g. via social media or on a forum online)	2%	3%	1%	1%	2%	5%	3%	3%
Downloading mod versions of mobile games for free	3%	2%	6%	2%	3%	2%	5%	0%
Paying a small fee to access one or many games through a shared/ unknown account	2%	1%	2%	1%	3%	2%	1%	1%
Download for free from the internet, without really being sure where it comes from	6%	9%	8%	4%	5%	8%	8%	19%
Other	3%	4%	2%	2%	3%	2%	4%	7%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=1,017 (downloaded/streamed video games during the past 3 months)

Download for free from the internet, without really being sure where it comes from

Those unsure of the source of their free video game downloads were asked, i**n a new question this wave**, to explain more about how they accessed them in their own words.

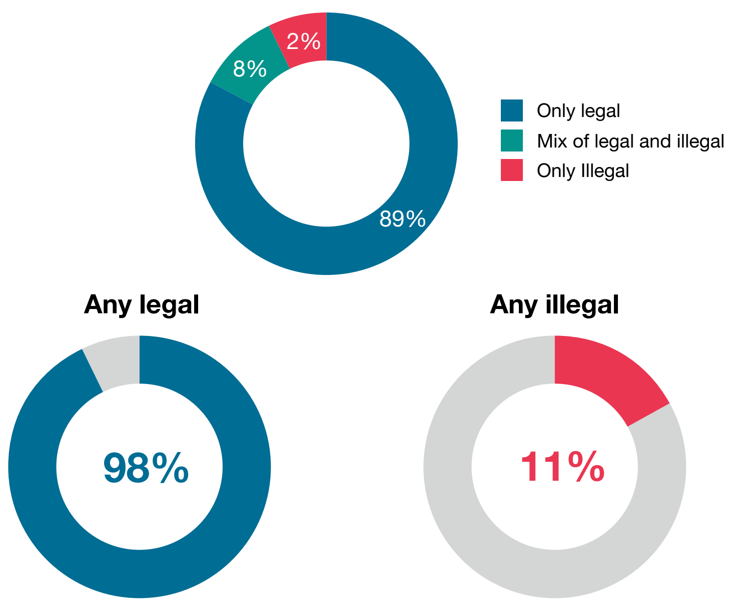
A variety of different methods were used to access free video games, with searching via Google receiving the most mentions.

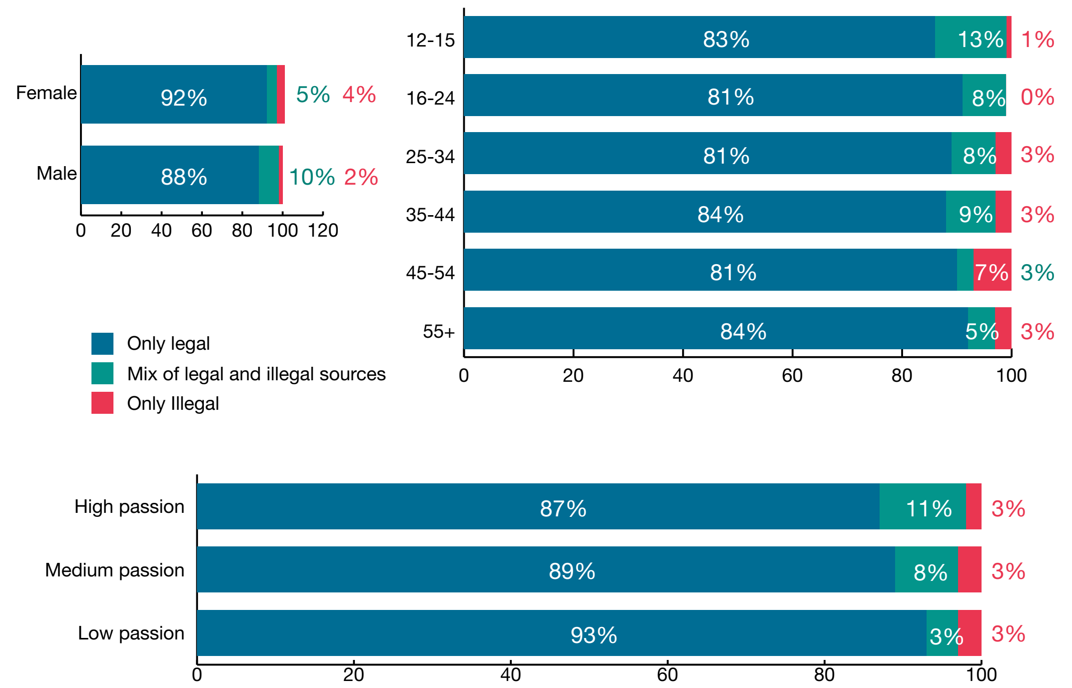
Legality of accessing video games online

To better understand the distribution of sources across legal and illegal categories, those who had accessed video games online in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

The answer option "download for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

- Legal:
  - **98%** had used at least one legal method to access video games online
  - **89%** had used legal sources only to access video games online
- Illegal:
  - **11%** had used at least one illegal source to access video games online
  - **2%** had used illegal sources only to access video games online.
- Mixed:
  - **8%** had used a mix of legal and illegal sources
  - Use of both legal and illegal sources was slightly higher among those aged 12-15 (13%)





Base: n=941 (downloaded/streamed video games in the past 3 months, with those who selected 'other' or 'not sure of source' removed)

E10. And how is the way you download/stream video games typically split across the following sources?

Legality	Source	Average % of usage split	Average downloads
Legal	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.	37%	9
	Downloading video games for free through Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc.	38%	7
	A video game streaming service such as PlayStation Now or Google Stadia	8%	2
	Social media services such as Facebook, Twitter, Instagram or Snapchat	4%	1
Illegal	Downloading mod versions of mobile games for free	1%	0
	Receiving a link to download video games made available by someone else (for example via social media or on a forum online)	1%	0
	A file-sharing or peer to peer service where links to download files are typically available on sites	1%	0
	Paying a small fee to access one or many games through a shared/ unknown account	1%	0
	Receiving the file(s) directly from someone else	0%	0
	A file hosting website or cyberlocker	0%	0
Other	Download for free from the internet, without really being sure where it comes from	6%	1
	Other	3%	0

Base: n=1,017 (downloaded/streamed video games in the past 3 months)

Qualitative insights

In the qualitative discussions, respondents mentioned using a range of sources, most of which were legal. Generally, the benefits of using legal methods, such as being **risk free**, **supporting the industry** and games being **exclusive** to or **integrated** within certain platforms were compelling enough reasons to access games legally and pay for them. Additionally, the availability of free games, particularly during lockdown, meant that for some respondents, seeking games through unofficial sources was very rare.

- *"I think I would choose Steam to consider buying the game because the F1 game is compatible on Steam and I can buy the activation code in order to play it on their platform app."* - Male, 25-34
- *"I haven't been using any of the [illegal] sources through lockdown. I generally find I could use free games if I need a game that I don't want to pay for."* - Male, 35-44
- *"I believe Steam probably offers the best overall package as they have great content, it's a great platform, easy to use and often has special offers*." - Male, 35-44

There were, however, certain **circumstances** in which illegal sources were attractive or offered certain perks. Accessing content for **free** was by far the greatest motivator, especially because the cost of many games was perceived to be substantial, compared to other kinds of entertainment. As well as those who simply wanted the game for free, some respondents liked to **try a game** before committing to purchasing it. In some cases, respondents would try a **demo** via an official platform, then go on to either buy the game or illegally download it, usually by torrenting it via a file sharing website. Some would also do the inverse; download a game via a file sharing website to try it before purchasing it through an **official platform**. Some respondents also mentioned using illegal sources specifically to access older games which were **not readily available** through legitimate sources.

- *"I use peer-to-peer, currently using Utorrent which suits my needs and is what I favour. I benefit by a) it being free and b) being instant."* - Female, 45-54
- *"The main strengths are that it is free and that it is easy to install."* - Male, 16-24
- *"I start with free trials and download from piratebayproxy using uTorrent."* - Female, 35-44
- *"I sometimes use a file hosting site to get games that are no longer on steam (like call of duty modern warfare 3) but still have an active multiplayer community."* - Male, 16-23

Respondents did, however, have **significant concerns** around accessing content through unofficial sources. These concerns revolved around being susceptible to **viruses, malware** or **hacking**. Being **unethical** and the chance of games simply **not working** were also identified as drawbacks of illegal methods.

- *"I think file hosting or file-sharing are two unstable sources for downloading games as they may carry unwanted viruses."* - Male, 35-44
- *"Weaknesses or drawbacks are in terms of security. The apps could have malicious software installed in the app. The app might not be what you think it is, you might invalidate warranties/insurance on your devices if you get a virus."* - Male, 35-44
- *"Now as I have become older I do not get games for free because I understand that doing this is wrong because you are not supporting the developer and also it's just not right. I pay for every game possible and do not exploit this as much as I used to."* - Male, 35-44

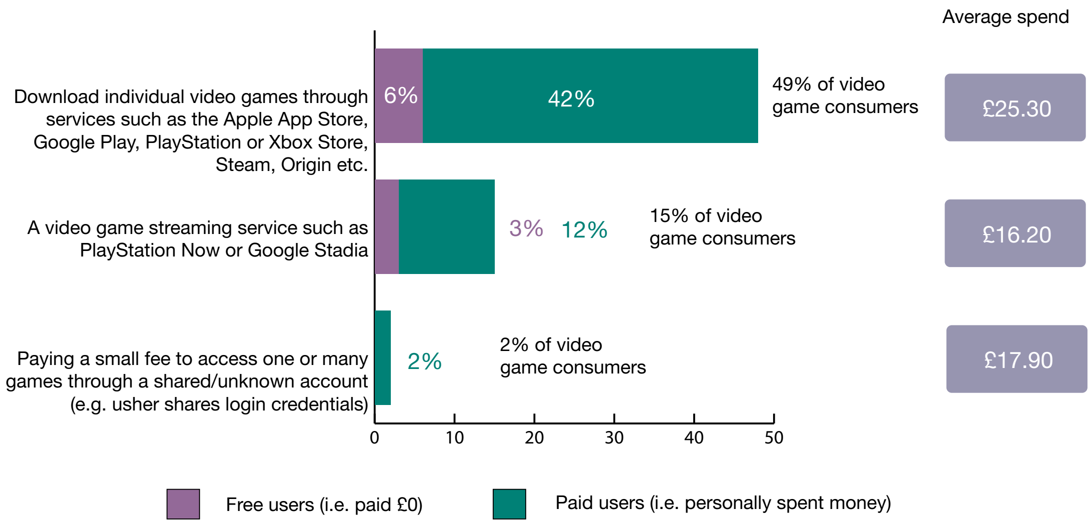
- *"If I find an interesting game and don't want to pay for it, I usually mod it, or download a modded version online. Some modded games work correctly but some stop working when you connect to the internet."* - Male, 45-54

Paying for video games

In a new question this wave, those who had used a paid source to either download or stream/access video games were asked how much they had personally spent on each source.

- Half (49%) of video game consumers said that they had downloaded individual games in the previous three months through services such as the Apple App Store with most making a personal contribution towards this (42%) each month. They spend, on average, £25.30 each month.
- This was followed by those who had used a video game streaming service (15%) in the previous three months. They paid, on average, less than that spent on downloading games individually each month (£16.20 a month).
- A small proportion (2%) had used an illegal source, paying a small fee to access one or many games through a shared/unknown account. They paid, on average, £17.90 a month.

E11. Approximately how much do you personally spend each month on the below sources of streaming or downloading video games? (Proportion of video game consumers over past three months using a paid source and average amount spent each month by users of that source)



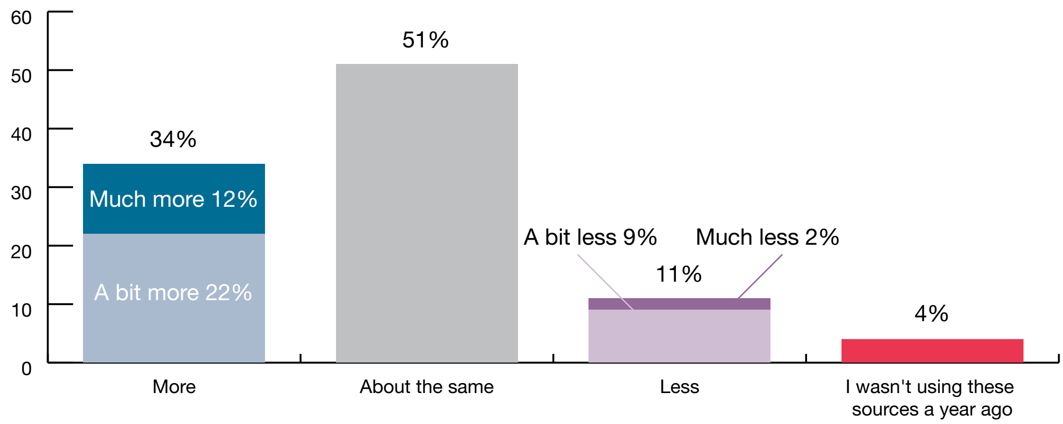
Base: n=1,017 (streamed and/or downloaded video games)

Change in use of illegal sources

I*n a new question this wave*, those who had used an illegal source to download or stream/access video games were asked how the use of these sources compares to the same point a year ago.

- Approximately half (51%) of respondents stated that their usage had remained the same. Respondents were almost three times as likely to say they were using these sources more (34%) rather than using them less (11%). Relatively few said they weren't using them a year ago (4%).

E12. You said you download / access video games using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=387 (those who had downloaded/accessed video games illegally)

Respondents whose usage of illegal sources had changed since the previous year were asked a follow up open text question about the reasons for this change. Those who were using these sources **more** than they were a year ago highlighted that they had more time on their hands now owing to the coronavirus outbreak, so were spending more time playing video games, thus seeking out and accessing more games using these methods. A few also mentioned that the pandemic had resulted in them having less money to spend, making it more important for them to be able to find the games for free.

- *"Because they offer me more control and availability."* - Male, 35-44
- *"They are free and have a wide variety to choose from."* - Male, 12-15
- *"A friend told me that they were playing Theme Hospital downloaded for free from the Internet so I gave the same way a go."* - Male, 25-34
- *"[I have] less spare income."* - Male, 25-34
- *"[I have] lots of time now."* - Female, 35-44

Most of those who were using these sources **less** than they were a year ago mentioned playing fewer video games owing to lower levels of interest in them. A few also mentioned that they were not in search of any new games and were happy with what they currently had.

- *"I am less interested because of the impact from the coronavirus…"* - Male, 45-54
- *"I have found games I like to play so I don't need more at the moment."* - Female, 55+

The small proportion of respondents who had **started using** illegal sources since the same point last year highlighted that both boredom and being cost free were reasons for starting to use illegal sources to access video games.

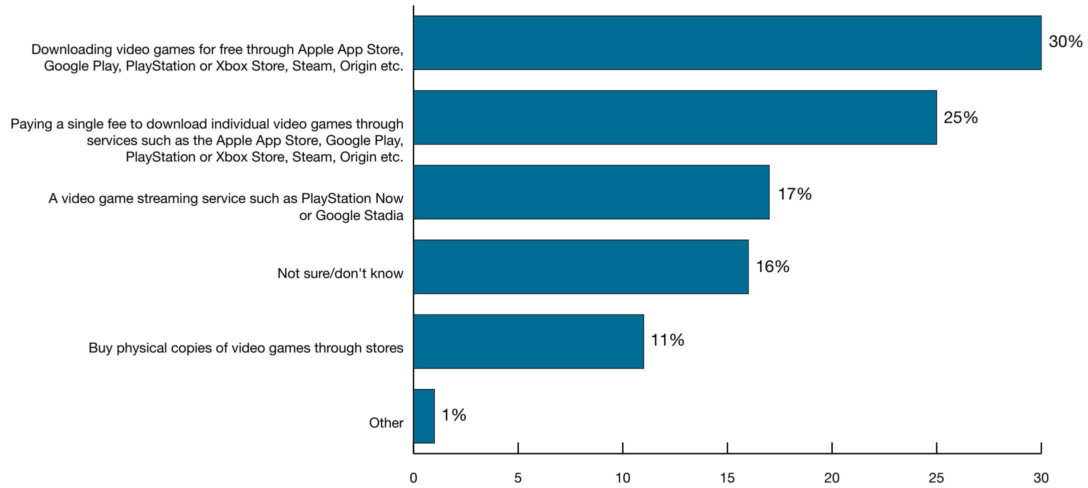
- *"[I started using these due to] boredom."* - Male, 35-44
- *"[A] friend recommended [a way to access video games] for free."* - Male, 12-15

Alternatives to infringement

Those who had used illegal sources to access video games online were asked which *single* legal source they would use if they could no longer access them illegally.

- The dominant response was that **official online marketplaces** would be used, with 30% saying they would use a free, and 25% a paid, version.
- These were followed by 17% who said they would use "a video game streaming service such as PlayStation Now or Google Stadia".
- A large proportion (16%) said they are "not sure / don't know" what they would do.

E13. If video games were no longer available to download or stream via these sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
Downloading video games for free through Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc.	27%	39%	62%	27%	22%	14%	30%	34%
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.	26%	21%	5%	27%	37%	35%	19%	0%
A video game streaming service such as PlayStation Now or Google Stadia	17%	15%	22%	19%	11%	21%	21%	0%
Buy physical copies of video games through stores	15%	3%	11%	28%	7%	5%	10%	0%
Other	1%	0%	0%	0%	0%	5%	0%	0%
Not sure/don't know	14%	22%	0%	0%	22%	20%	21%	66%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=99 (downloaded and/or streamed video games illegally)

Qualitative insights

In the Online Community, respondents were asked to imagine a world in which there was no more illegal access to video games. This prospect was **more concerning for some** than it was for others. Some said it **wouldn't make too much of a difference**, as they primarily accessed games through **legal channels** anyway, with some even feeling an emphasis on these methods would contribute to an **increase in the amount of time they spent playing** so as to get more value from the money they had spent. On the other hand, some felt that such a scenario would **shut them out of gaming** entirely - mostly owing to the feeling that their needs were **too specific** and were unlikely to be included in some of the more cost-effective subscriptions, while paying for individual content would remain **unaffordable**.

- *"I would be happy if these could be the only ways of accessing video games this way... It would encourage me to access more video games and probably play for longer (to utilise the cost of the subscription)."* - Male, 35-44
- *"If the only options were the ones stated I think my video game playing would be over. I am not a true gamer in the sense of playing all the hyped up must-have games true gamers play. Any subscription services would be 99% content I have no interest in accessing which means I'd be wasting my money paying a regular fee."* - Female, 45-54

When elaborating on existing legal methods, a few pointed out that although the existing official subscription models were decent, they consumed a **great deal of data,** so in order for them to be more practical, devices and gaming infrastructure would need to **better meet their needs** to increase the appeal of official methods. Most had ideas about ways that video game providers could **better cater to the needs of modern gamers** and **encourage use of legal methods of access.** A common suggestion was **expanding existing streaming subscriptions,** for example via a more integrated 'Netflix-style' subscription, which would give people access to a wider catalogue while keeping costs low. Respondents also had concerns that many devices **couldn't currently handle the data demands of more than one gaming streaming platform.**

- *"One of the disadvantages is that it requires a large amount of data. I use PlayStation Now but it consumes lots of data. So, I generally play offline games more than online ones."* - Male, 25-34
- *"I would like to see more of a Netflix kind of option for games where you pay one fee per month and you have access to all games possible for said platform, however I do think I would be installing games I would not normally play and it would also make the space on hard drives very limited unless you used say Google Stadia where it's just a streaming service."* - Male, 35-44

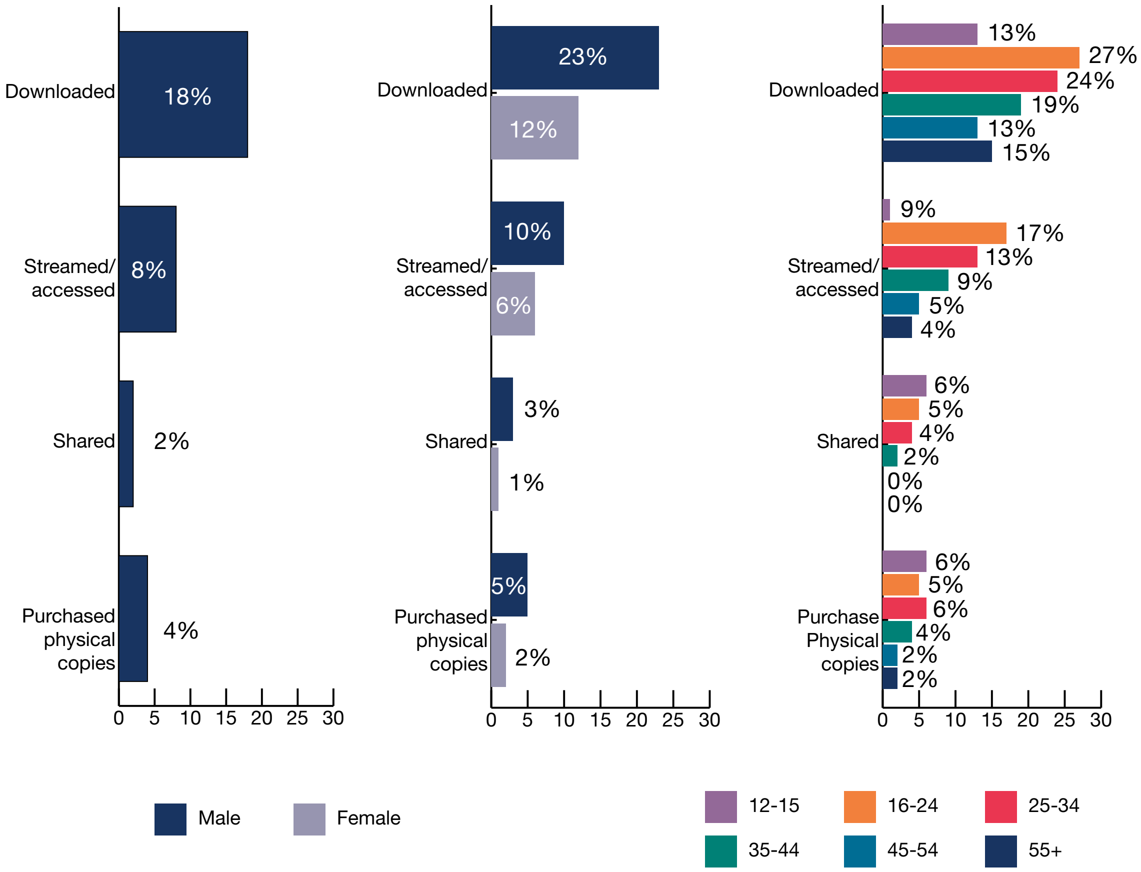
Software

Engaging with software

Around a fifth (22%) had engaged with software in the previous 3 months (i.e. either by downloading, streaming/accessing, sharing or purchasing physical copies).

- **Downloading was the most common method** of accessing software, with 18% having done so. This was followed by 8% who had streamed/accessed software online.
- Those aged **16-34** were most engaged with software, for both downloading and streaming online.

F1. Have you downloaded/streamed/shared[7]/purchased physical copies of software in the past 3 months?



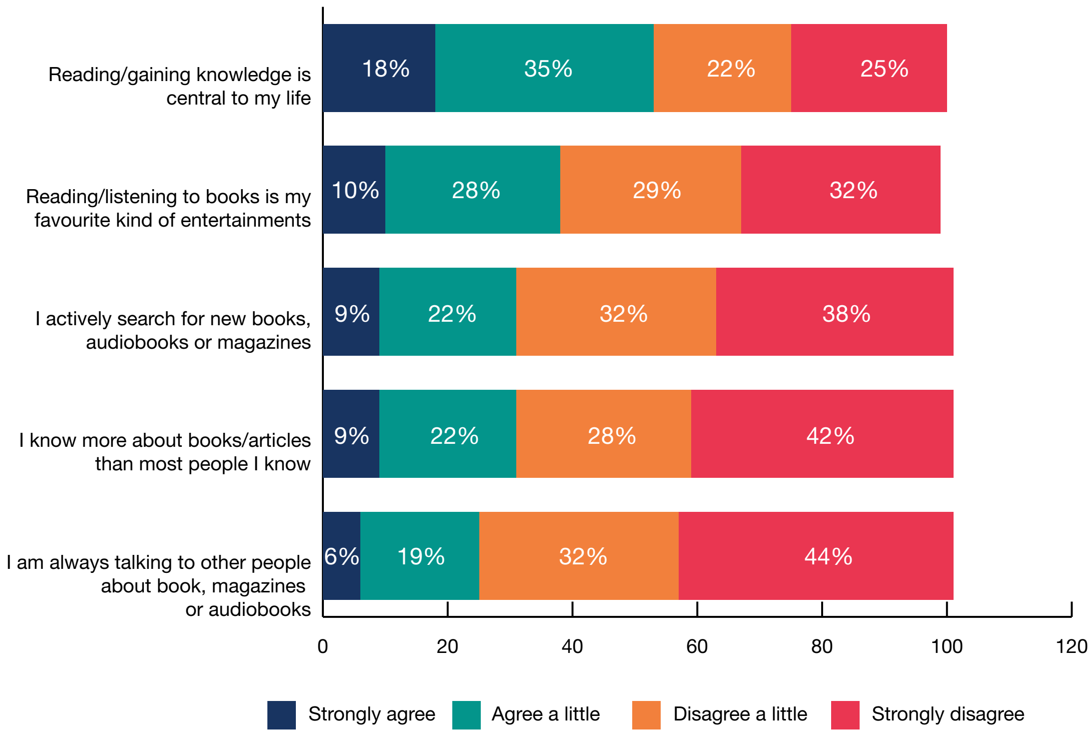
Base: n=5,004 (total sample)

7 The definition of 'shared' was provided as: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in the answer option."*

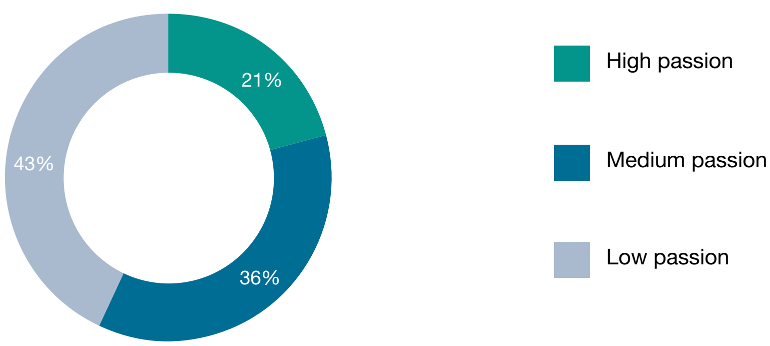
To get a broader sense of **their passion for software**, respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

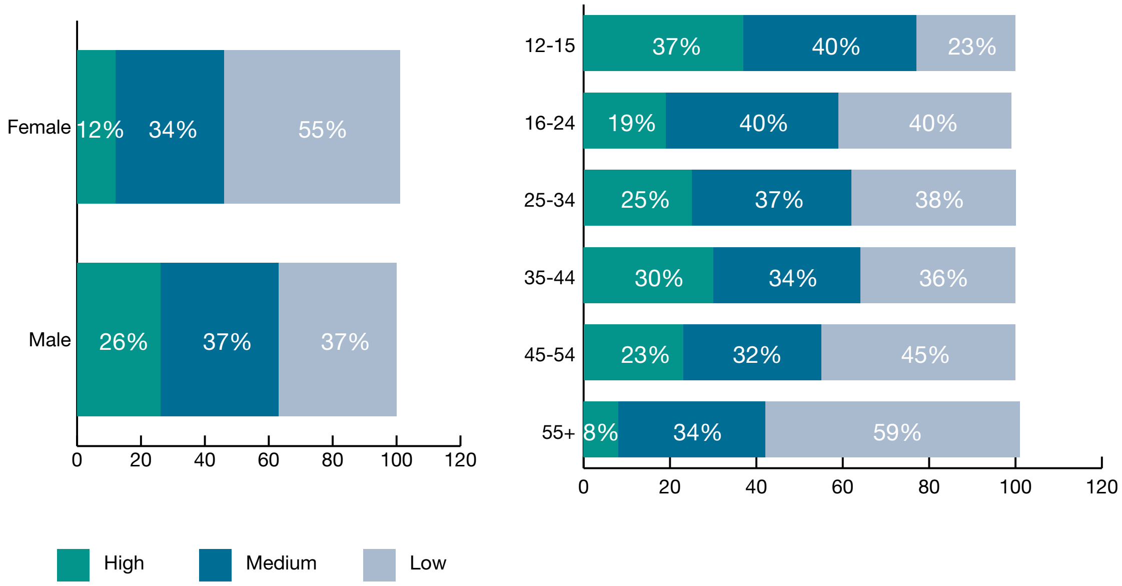
- A fifth (21%) displayed **high levels of passion for software**. This was, however, more apparent in those aged between 12-15, where approximately a third (37%) had high levels of passion.
- When looking at individual statements, accessing software appears to be more of a **day-to-day necessity** rather than a hobby. Just one statement was agreed with by more than half; 53% felt that "Certain software packages (Adobe Suite, Microsoft Office etc.)" were central to their lives.

F2. To what extent do you agree or disagree that each of the following statements describe you?



Base: n=1,118 (downloaded, streamed, shared and/or purchased physical copies of Software in the past 3 months)



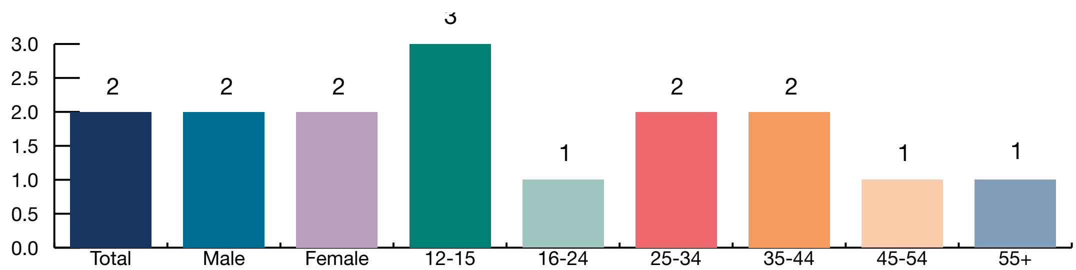


Physical purchasing of software

The 4% of respondents who had purchased software in physical formats, such as CDs, during the previous 3 months were asked a question around the number of purchases made.

- The number of software packages respondents had purchased in physical form was relatively low. During the previous 3 months it had amounted to an average of two.

F3. In the past 3 months, how many software packages have you purchased physical copies of?



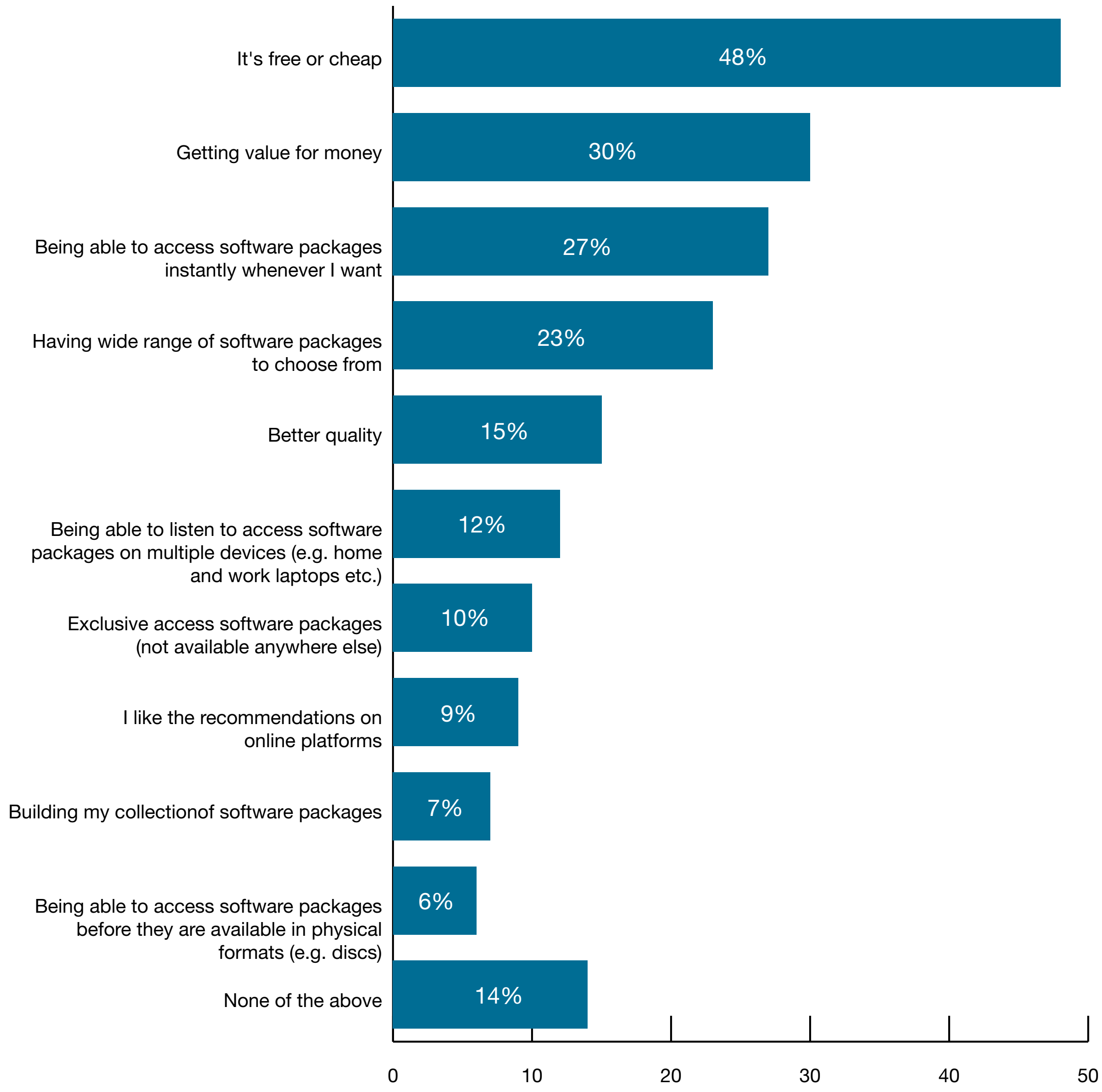
Base: n=162 (purchased physical software packages in the past 3 months)

Understanding online consumption of software

To better understand the drivers of online consumption, those who had accessed software packages online in the previous 3 months were asked to select their top three reasons for doing so.

- **The dominant theme was cost**. The only option that was selected by approaching half of respondents was "It's free or cheap" (48%), with "Getting value for money" also selected by a relatively high proportion (30%).
- These cost factors were **consistently in the top three reasons across all age groups** and were most frequently joined by "Being able to access software packages instantly whenever I want" (27%).

F4. What are the main reasons that you choose to access software packages online? Please select your top 3. (%)



Base: n=1,040 (those who downloaded or access software packages through the internet in the past three months)

Male respondents	Female respondents
1. It's free or cheap (47%) 2. Getting value for money (33%) 3. Being able to access software packages instantly whenever I want (27%)	1. It's free or cheap (49%) 2. Being able to access software packages instantly whenever I want (26%) 3. Getting value for money (25%)
Aged 12-15	**Aged 16-24**
1. It's free or cheap (38%) 2. Getting value for money (29%) 3. Being able to access software packages on multiple devices (27%)	1. It's free or cheap (45%) 2. Being able to access software packages instantly whenever I want (26%) 3. Having a wide range of software packages to choose from (25%)
Aged 25-34	**Aged 35-44**
1. It's free or cheap (43%) 2. Getting value for money (32%) 3. Being able to access software packages instantly whenever I want (29%)	1. It's free of cheap (45%) 2. Getting value for money (31%) 3. Being able to access software packages instantly whenever I want (27%)
Aged 45-54	**Aged 55+**
1. It's free or cheap (48%) 2. Being able to access software packages instantly whenever I want (25%) 3. Having a wide range of software packages to choose from (25%)	1. It's free or cheap (58%) 2. Getting value for money (35%) 3. Being able to access software packages instantly whenever I want (26%)

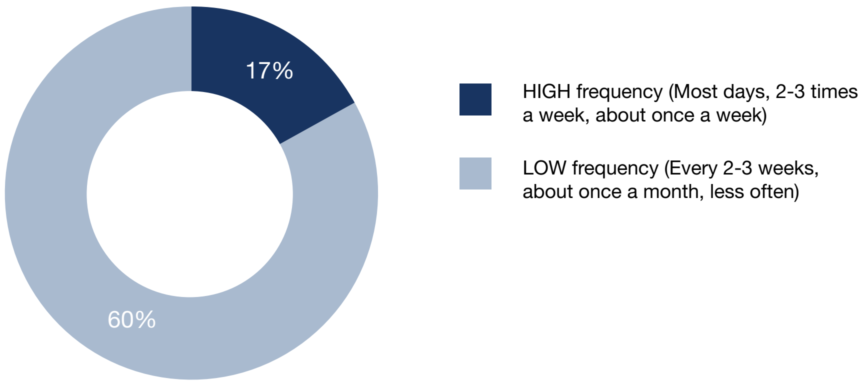
Downloading/accessing software packages online

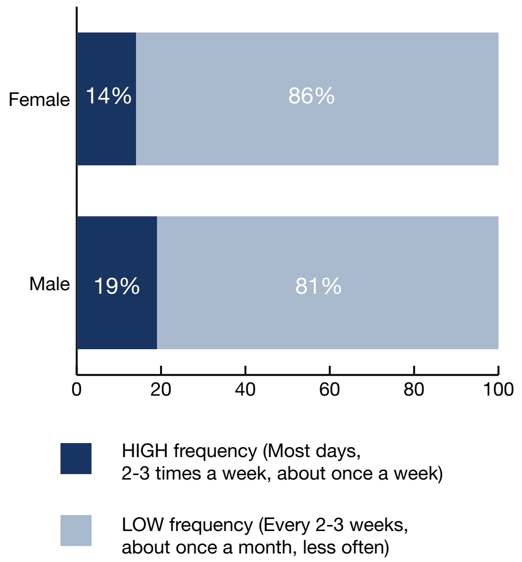
The 21% who had downloaded/accessed software online during the previous 3 months were asked more questions around frequency, volume and sources used.

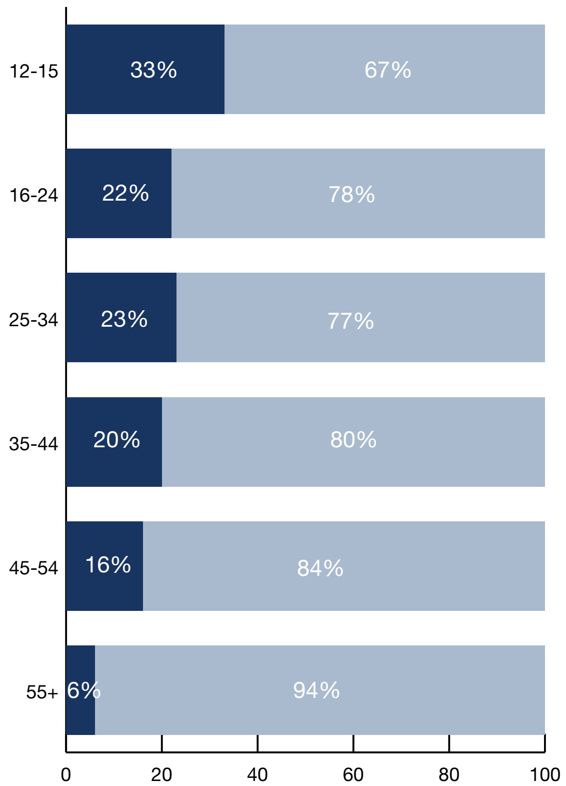
Frequency and volume of downloading software

- Approximately one in five (17%) of those who downloaded/accessed software did so frequently (i.e. at least once a week).
- The amount of software downloaded/accessed since COVID-19 hadn't changed for approximately three quarters (78%) of respondents. The remainder were fairly evenly split between those who had downloaded/accessed them less or more.
  - Before COVID-19, respondents had downloaded/accessed, on average, 6 pieces of software every three months.
  - During the previous three months the amount they had downloaded had increased marginally to, on average, 8 pieces of software.
  - The increase in downloading/accessing software was most prevalent in those aged 12-34.

F5. Generally, how often do you download or access software packages through the internet?

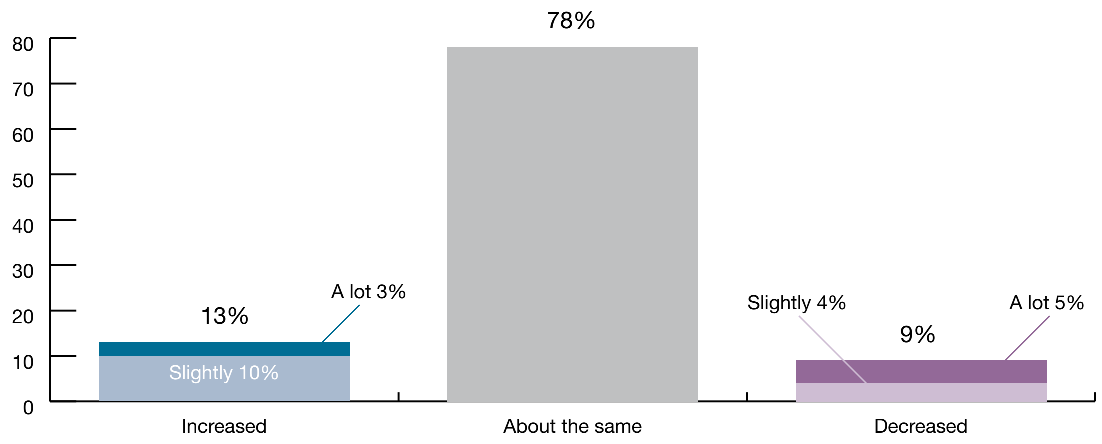




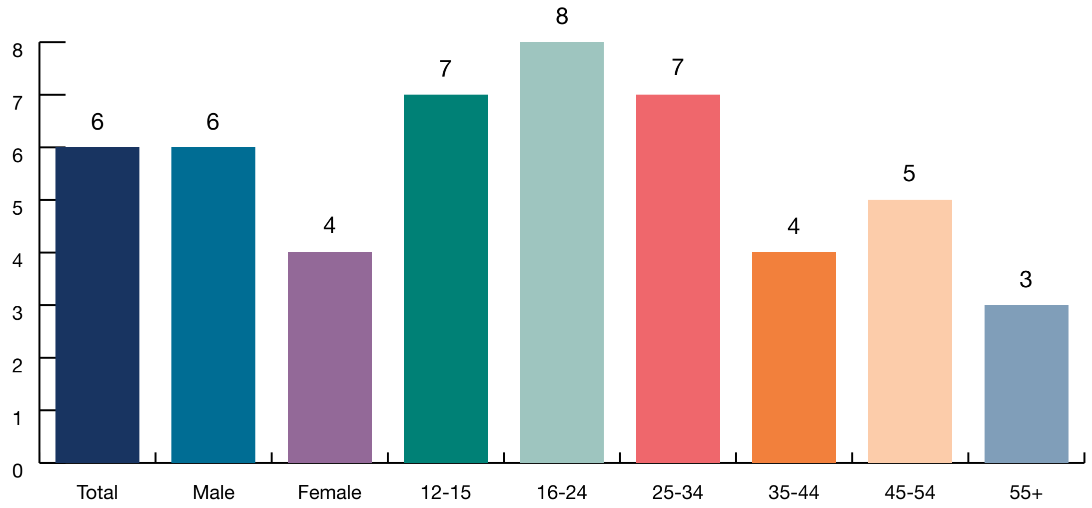


Base: n=1,040 (those who downloaded or access software packages through the internet in the past three months)

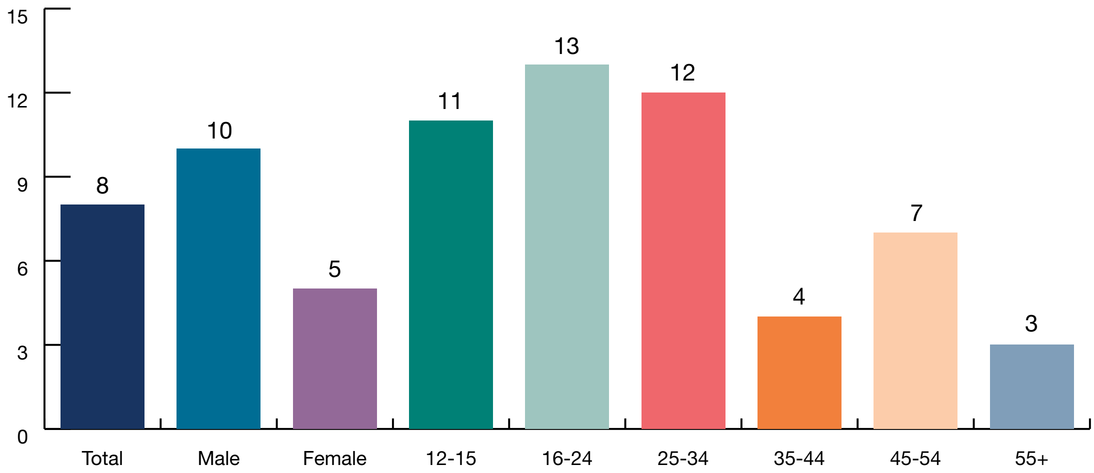
F6. Since the coronavirus (COVID-19) outbreak, would you say the number of software packages you have downloaded or accessed through the internet has?



F7. Before the coronavirus outbreak, how many software packages did you download/access through the internet?



F8. In the past 3 months how many software packages did you download/access through the internet? (Average purchases)



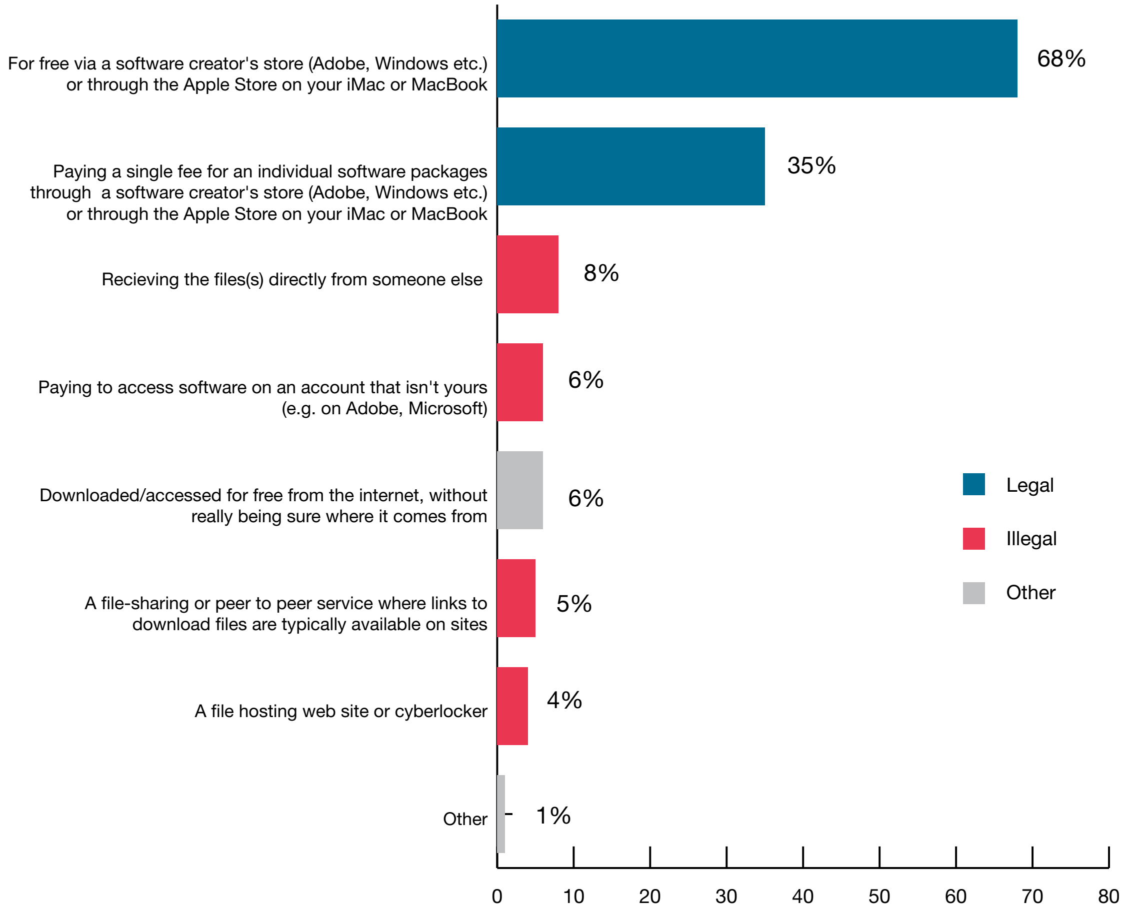
Base: n=1,030 (those who downloaded or access software packages through the internet in the past three months)

Sources of accessing software packages online

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could download software. An 'unknown' option was also provided to serve as a catch-all for those who were unsure of the exact source.

- The **most used sources were legal ones**. The most popular, by a large margin, was "For free via a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook", selected by over two thirds (68%).
- This was followed by just over a third (35%) who paid "a single fee for an individual software package through a software creator's store (Adobe, Windows etc.)."
- The most common **illegal** method was "receiving the file(s) directly from someone else" (8%), with the other two illegal methods ("paying to access software on an account that isn't yours" and "A file-sharing or peer to peer service) just behind at 6% and 5% (respectively).

F9. Which of the following have you used to access software packages in the last 3 months? (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
For free via a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	68%	69%	61%	67%	67%	66%	70%	73%
Paying a single fee for an individual software packages through a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	37%	33%	32%	38%	45%	38%	26%	29%
Receiving the file(s) directly from someone else	7%	10%	11%	11%	5%	7%	6%	10%
Paying to access software on an account that isn't yours (e.g. on Adobe, Microsoft)	7%	5%	10%	8%	7%	7%	4%	5%
Downloaded/accessed for free from the internet, without really being sure where it comes from	6%	7%	3%	6%	5%	5%	7%	9%
A file-sharing or peer to peer service where links to download files are typically available on sites	6%	3%	10%	6%	5%	4%	5%	3%
A file hosting web site or cyberlocker	6%	2%	13%	7%	6%	2%	2%	1%

Base: n=887 (those who downloaded or accessed software packages online during the past three months)

Downloaded/accessed for free from the internet, without really being sure where it comes from

Those unsure of the source of their software downloads were asked, **in a new question this wave**, to explain more about how they downloaded them in their own words.

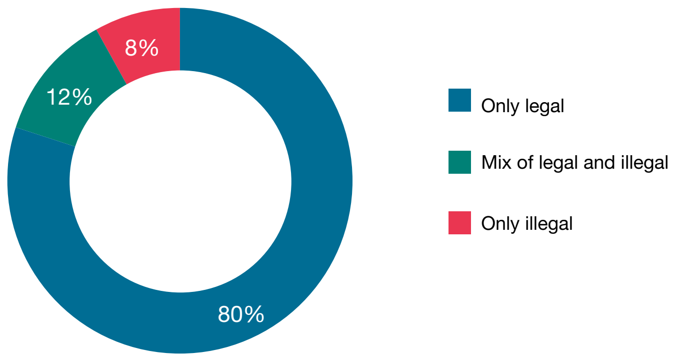
Respondents used a variety of different sources to download software from the internet. These included searching for the software on Google and finding directions on how to download the software on websites such as YouTube and Reddit. For all of these methods, multiple respondents expressed making an effort to ensure that the software would not harm their computer. This included checking with a tech savvy friend/partner, only using trusted sites, using a virus scanner, and reading or watching tutorials prior to downloading. Some mentioned requiring software for work (e.g. Zoom), while others mention deleting a software soon after downloading it.

Legality of downloading/accessing software packages online

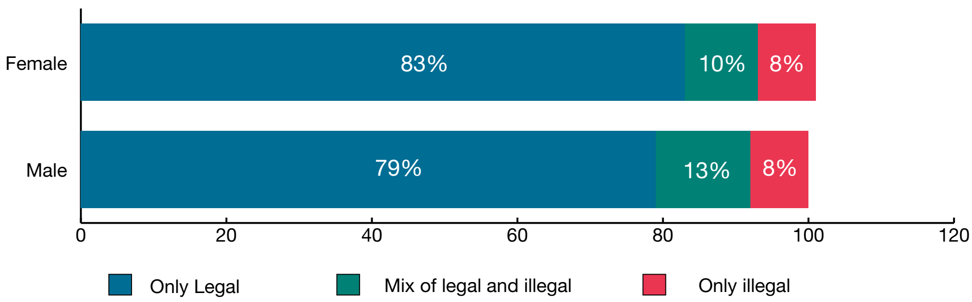
To better understand the distribution of sources across legal and illegal categories, those who had downloaded/accessed software in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

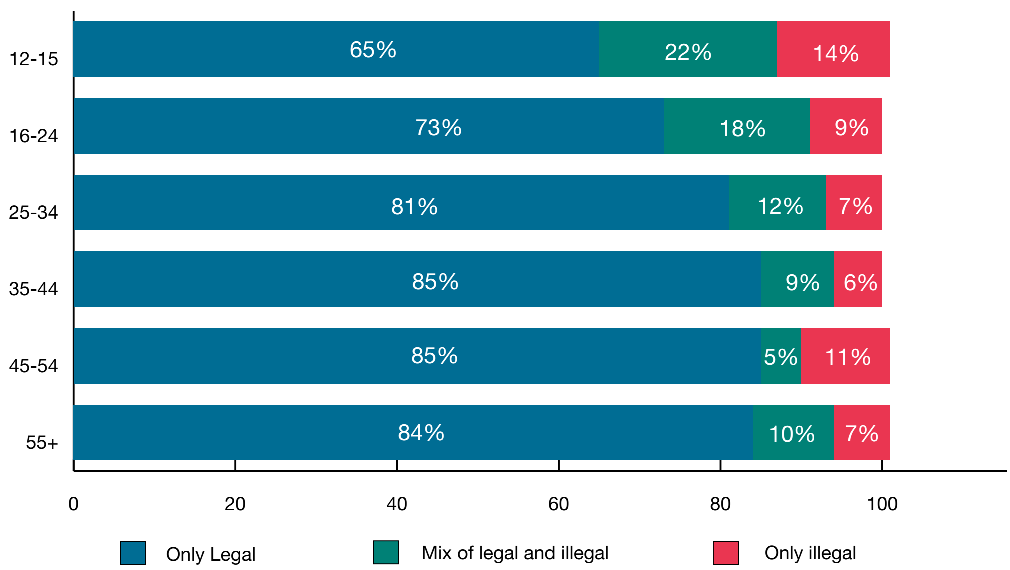
The answer option "downloaded/accessed for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they **only** consumed content this way was not included in the base.

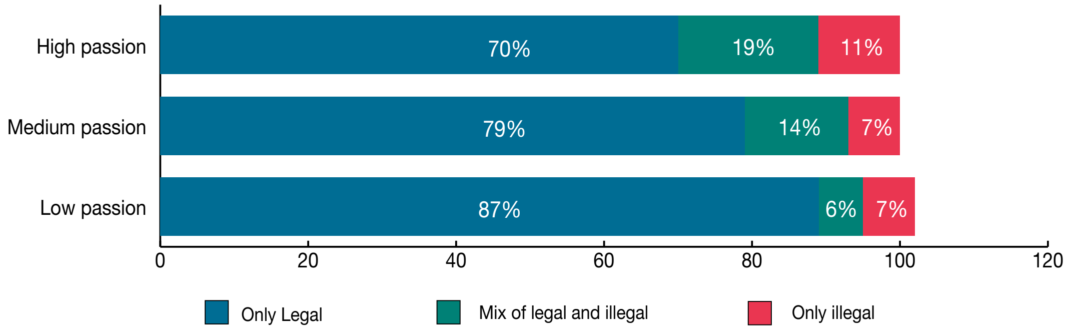
- Legal:
  - 92% had used at least one legal source to download software.
  - 80% had used legal sources only to download software.
- Illegal:
  - 20% had used at least one illegal source to download software.
  - 8% had used illegal sources only to download software.
- Mixed:
  - 12% had used a mix of legal and illegal sources to download software.


8%
12%
80%
Only legal
Mix of legal and illegal
Only illegal


Total legal
92%
Total illegal
20%


Female
83%
10%
8%
Male
79%
13%
8%
0
20
40
60
80
100
120
Only Legal
Mix of legal and illegal
Only illegal


12-15
65%
22%
14%
16-24
73%
18%
9%
25-34
81%
12%
7%
35-44
85%
9%
6%
45-54
85%
5%
11%
55+
84%
10%
7%
0
20
40
60
80
100
Only Legal
Mix of legal and illegal
Only illegal



Base: n=887 (those who downloaded or accessed software packages online during the past three months)

F10. And how is the way you download or access software packages typically split across the following sources?

Legality	Source	Average % of usage split	Average number of downloads
Legal	For free via a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	50%	4
	Paying a single fee for an individual software packages through a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	23%	2
Illegal	Receiving the file(s) directly from someone else	3%	0
	Paying to access software on an account that isn't yours	3%	0
	A file hosting web site or cyberlocker	2%	0
	A file-sharing or peer to peer service (where links to download files are typically available on sites	2%	0
Other	Downloaded/accessed for free from the internet, without really being sure where it comes from	9%	0
	Other	8%	0

Base: n=1,040 (those who downloaded or access software packages through the internet in the past three months)

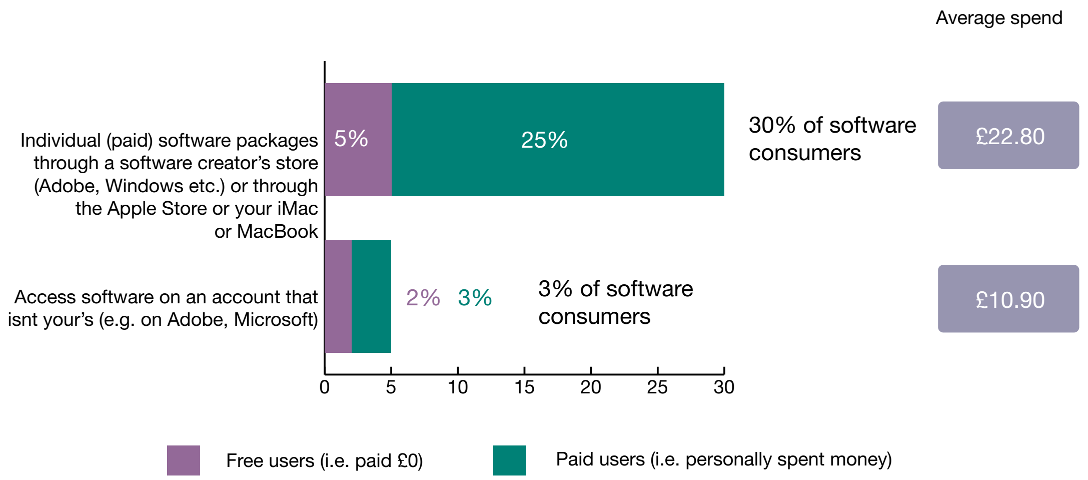
Paying for software

In a new question this wave, those who had used a paid source to download/access software were asked how much they had personally spent on each source.

- Three in ten (30%) software consumers said they had used **an individual (paid) software package through a software creator's store** over the past three months, with most making a personal contribution towards a subscription (25% of total software consumers). They spent, on average, £22.80 each month.

- A smaller proportion (5%) of consumers had accessed software through a paid illegal option ("access software on an account that isn't yours") over the past three months, with around half of those (3% of total software consumers) having paid to do so each month. They spend, on average, approximately half of that spent on the legal paid option (£10.90 each month).

F11. Approximately how much do you personally spend each month on the below sources of streaming or downloading software? (Proportion of software consumers over past three months using a paid source and average amount spent each month by users of that source)



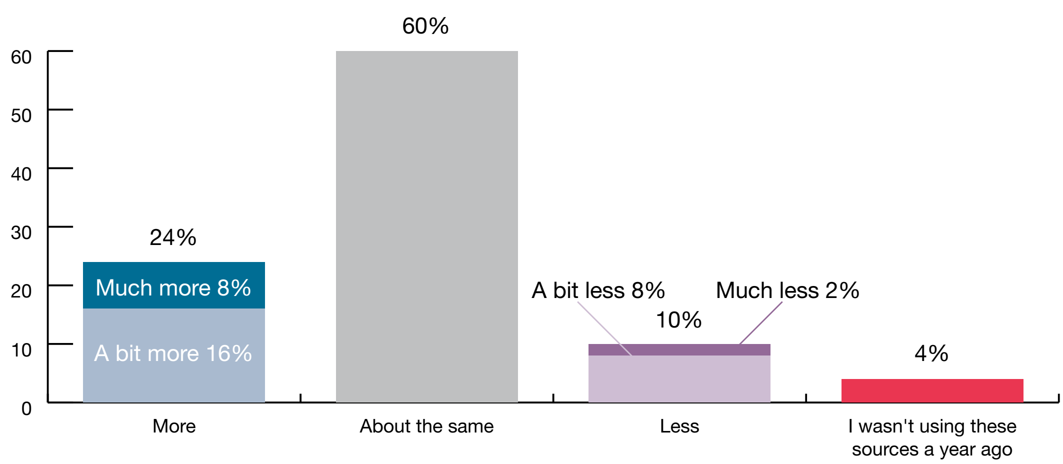
Base: n=1,040 (streamed and/or downloaded software)

Change in use of illegal sources

In a new question this wave, those who had used an illegal source to download or stream/access software were asked how the use of these sources compares to the same point a year ago.

- Respondents were most likely to say that their use of illegal sources to access software had remained the same (60%). This was followed by those who said they use them more (24%) with the smallest proportions saying that they used them less (10%) or that they weren't using these sources a year ago (4%).

F12. Compared with the same point a year ago, would you say you are using those illegal sources...



Respondents whose usage of illegal sources had changed since the previous year were asked a follow up open text question about the reasons for this change.

Those who were using these sources **more** than they were a year ago highlighted that having more time as a result of COVID-19 had led to them to download more software and that downloading software for free had often been out of necessity – e.g. a change in job, the need to access certain software from home owing to lockdown, etc.

- *"I have moved into a more group work based year at university and therefore am using these programs more."* - Female, 16-24
- *"More spare time to develop my skills."* - Male, 55+
- *"Because I have gotten into gaming and music making more."* - Female, 25-34
- *"Employment circumstances have changed and I needed access."* - Male, 35-44

Those who were using these sources **less** than they were a year ago explained that this was because they no longer had the need for the software. Among these respondents, there were those who had already downloaded the software they needed and those who had experienced a change in their life, such as finishing university, that had resulted in them using it less. Additionally, some mentioned that the hassle/difficulty of downloading free software had led them to do so less.

- *"University has ended early so I don't need to use software as much as I once did."* - Female, 16-24
- *"My current work does not require as much document creation as my previous job."* - Female, 35-44
- *"Too much hassle."* - Female, 25-34
- *"I've got what I need."* - Male, 55+
- *"Just my lifestyle of not being a student anymore, however I'm starting a Masters in September so will probably see an increase then."* - Female, 16-24

The small number of respondents who had **started using** these illegal sources since the same point last year highlighted that ease of access and necessity were the main reasons for doing so.

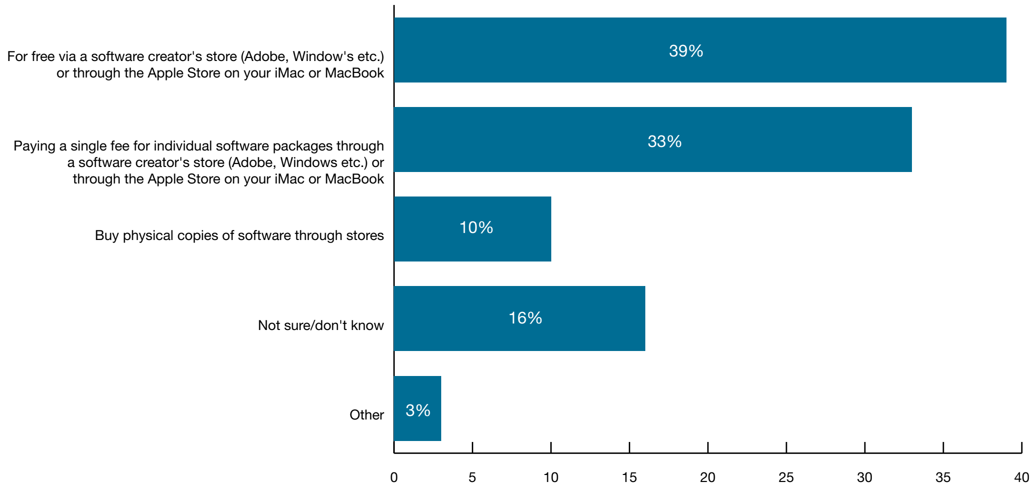
- *"Was easy to use and convenient."* - Female, 25-34
- *"It's needed for my work."* - Male, 55+
- *"Ease of access."* - Male, 25-34

Alternatives to infringement

Those who had used illegal sources to download software packages were asked which *single* legal source they would use if they could no longer access them illegally.

- The main preference, overall, would be to **use free options**, with approximately four in ten (39%) selecting "For free via a software creator's store or through the Apple Store on your iMac or MacBook".
- There was an indication that almost as many users would move onto paid options, with around a third (33%) saying that they would pay "a single fee for an individual software package through a software creator's store or through the Apple Store on your iMac or MacBook".

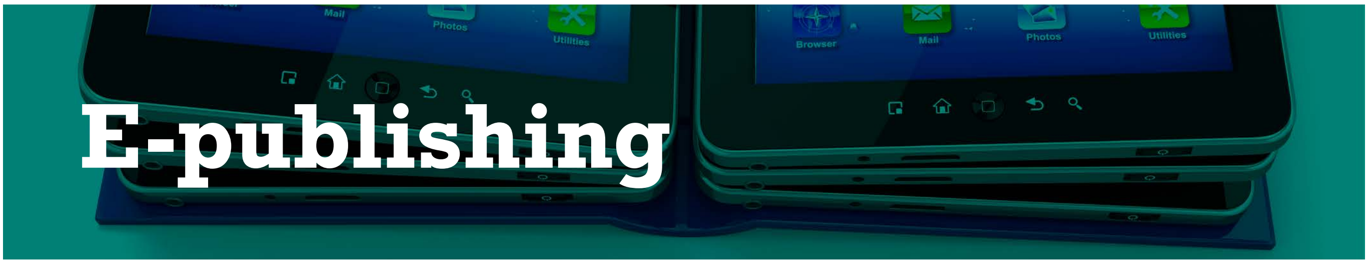
F13. If software packages were no longer available to download via these sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
Paying a single fee for an individual software packages through a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	35%	28%	32%	42%	37%	36%	25%	20%
For free via a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	36%	45%	33%	43%	40%	41%	25%	42%
Buy physical copies of software through stores	9%	12%	25%	5%	15%	4%	13%	3%
Not sure/don't know	17%	13%	10%	7%	8%	18%	30%	29%
Other	3%	2%	0%	3%	0%	0%	8%	6%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=174 (downloaded software illegally)



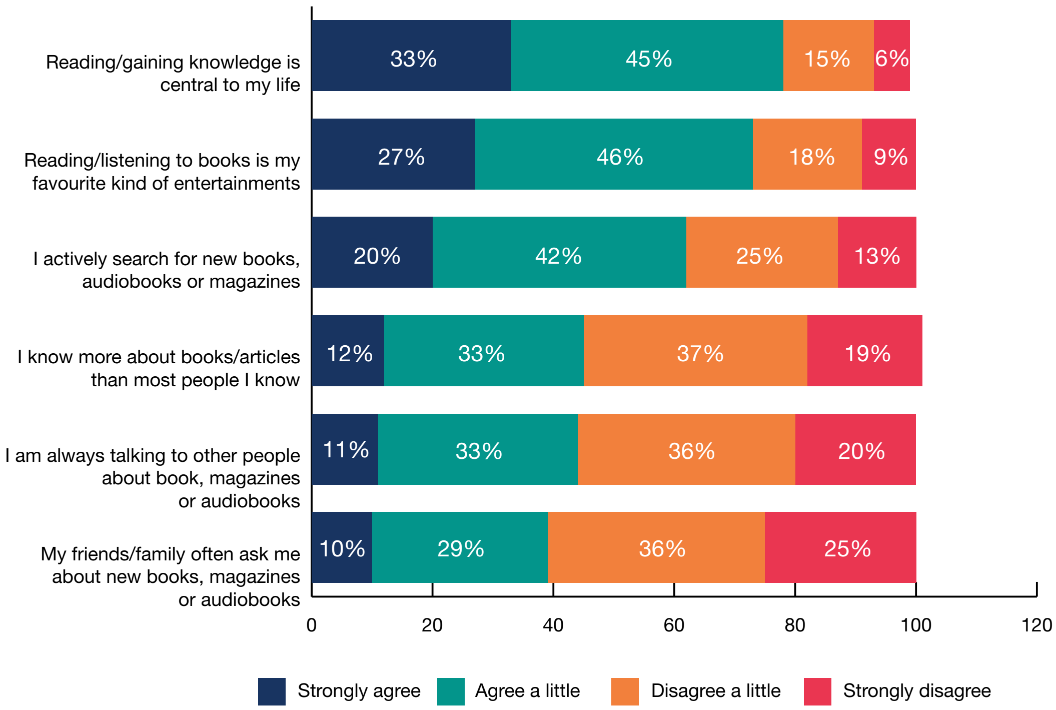
E-publishing

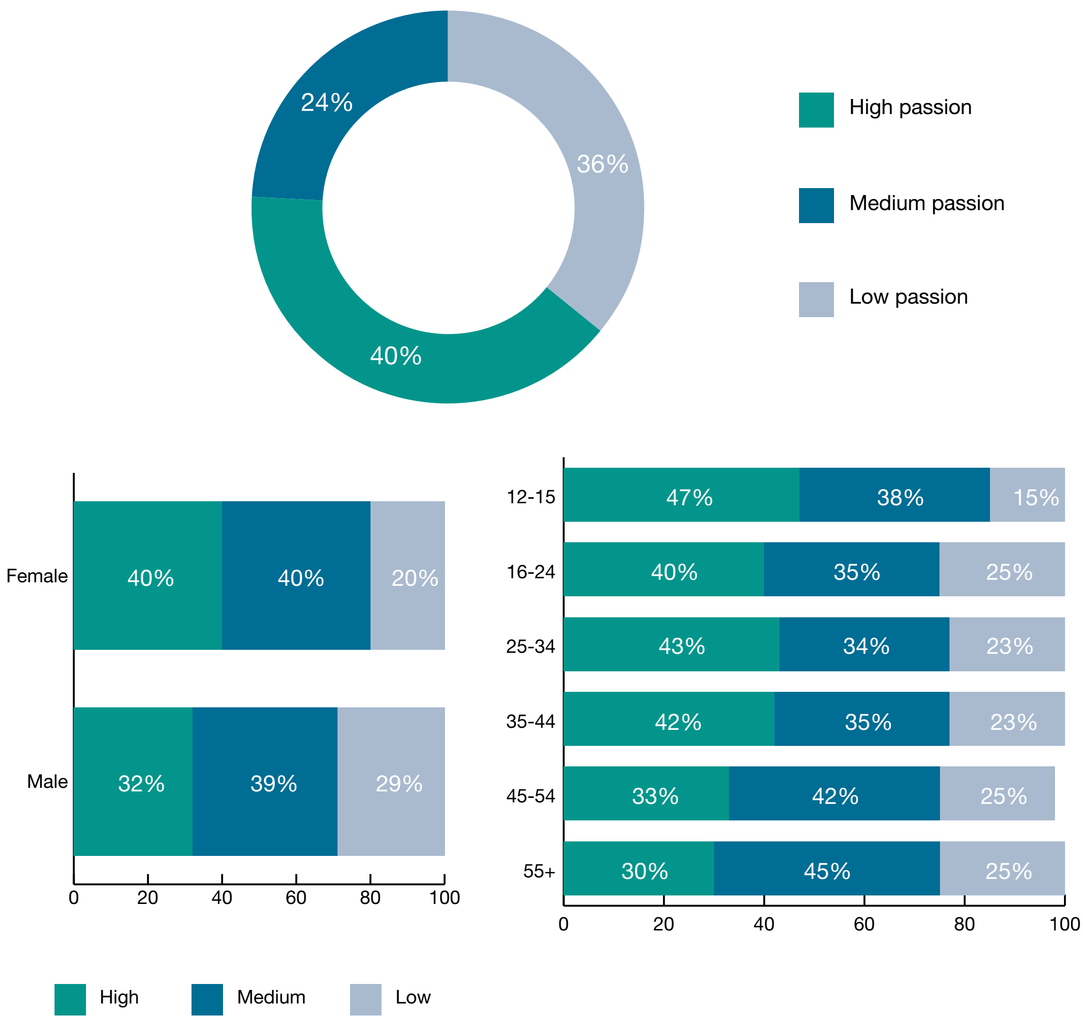
Engaging with e-publishing

To get a broader sense of **their passion for publications (i.e. either books/e-books, magazines/digital magazines or audiobooks)**, respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

- Approximately a third (36%) displayed **high levels of passion for publications.**
- Those with a high level of passion were more likely to be female (40%) than male (32%).
- Publications were valued as an important source of **knowledge and self-progression** ("Reading/gaining knowledge is central to my life" 79%) as well as of **entertainment** ("Reading/listening to books is my favourite kind of entertainment" 73%).

G1. To what extent do you agree or disagree that each of the following statements describe you?





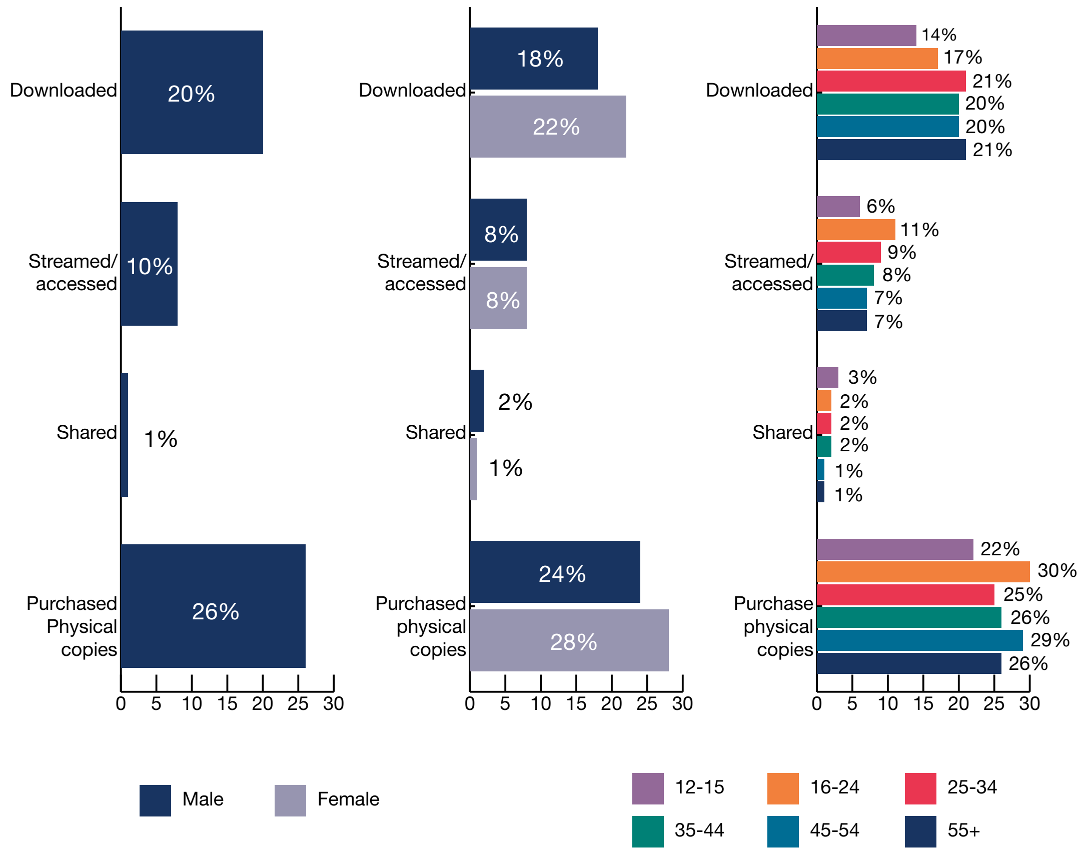
Base: n=2,350 (downloaded, streamed, shared and/or purchased physical copies of publications in the past 3 months)

E-books

39% had engaged with books/e-books in the previous 3 months (either by downloading, streaming or sharing e-books, or purchasing physical copies).

- The **most common method of access was purchasing physical copies** (26%).
- This was followed closely by downloading (20%) and then streaming/accessing online (8%).

G2. Have you downloaded/streamed/shared[8] any e-books or purchased physical copies of any publications in the past 3 months?



Base: 2020 n=5,004 (total sample)

Qualitative insights

The increased leisure time during the COVID-19 pandemic led to many spending **more time reading** books, both physical copies and online. Respondents tended to be passionate about reading, noting how they enjoy reading a **diverse set of genres and subjects** from fiction to non-fiction. Reading's ability to **transport people to another world** was considered extremely valuable, especially during a time of increased restriction.

- *"Reading allows you to live in a parallel world, one where a million significant things are happening out of your control."* - Female, 25-34
- *"Books offer such a wide variety of stores and also allow for more freedom in your interpretation."* - Female, 25-34
- *"Reading books is entertainment but also demanding – they force me to think, to wonder, analyse, and thus develop imagination more."* - Male, 45-54

8 The definition of 'shared' was provided as: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in the answer option."*

The changes in daily routine as a result of COVID-19 allowed respondents to spend **more time reading than in normal circumstances.** Reading helped fight off boredom and low moods associated with the lockdown. Respondents tended to **read books/e-books at the same points during the day as prior to the lockdown** – for example, before going to sleep. They had, however, been able to increase the length of these reading sessions or find more pockets of time throughout the day to supplement their normal reading.

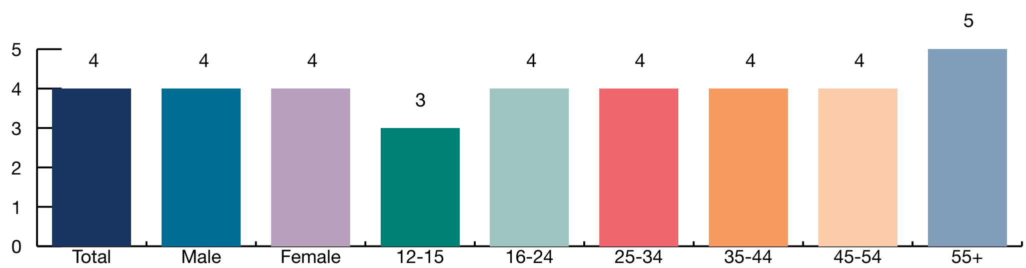
- *"As the lockdown has made me bored and uninspired, I have started to read more inspirational and self-help books to influence and give a boost to my mind."* - Female, 25-34
- *"I decided to read something new every day in the past few months since the impact of COVID-19."* - Male, 45-54
- *"I usually read e-books at night time when I'm in bed... since this lockdown, I've been reading during the day sometimes."* - Female, 25-34
- *"Before lockdown, I would only have time to read e-books in the morning at weekends, so on weekdays I would have to squeeze the time in whenever I could throughout the rest of the day. At the moment, I'm accessing books as frequently but for longer periods of time."* - Female, 25-34

Physical purchasing of books

The 26% of respondents who had purchased physical copies of books during the previous 3 months were asked a question around the number of purchases made.

- Respondents had purchased an average of 4 books over the past three months. This was the case for all genders and age groups with the exception of those aged 12-15 (who had purchased 3) and those 55+ (who had purchased 5).

G3. In the past 3 months, how many books have you purchased physical copies of? (Average purchases)



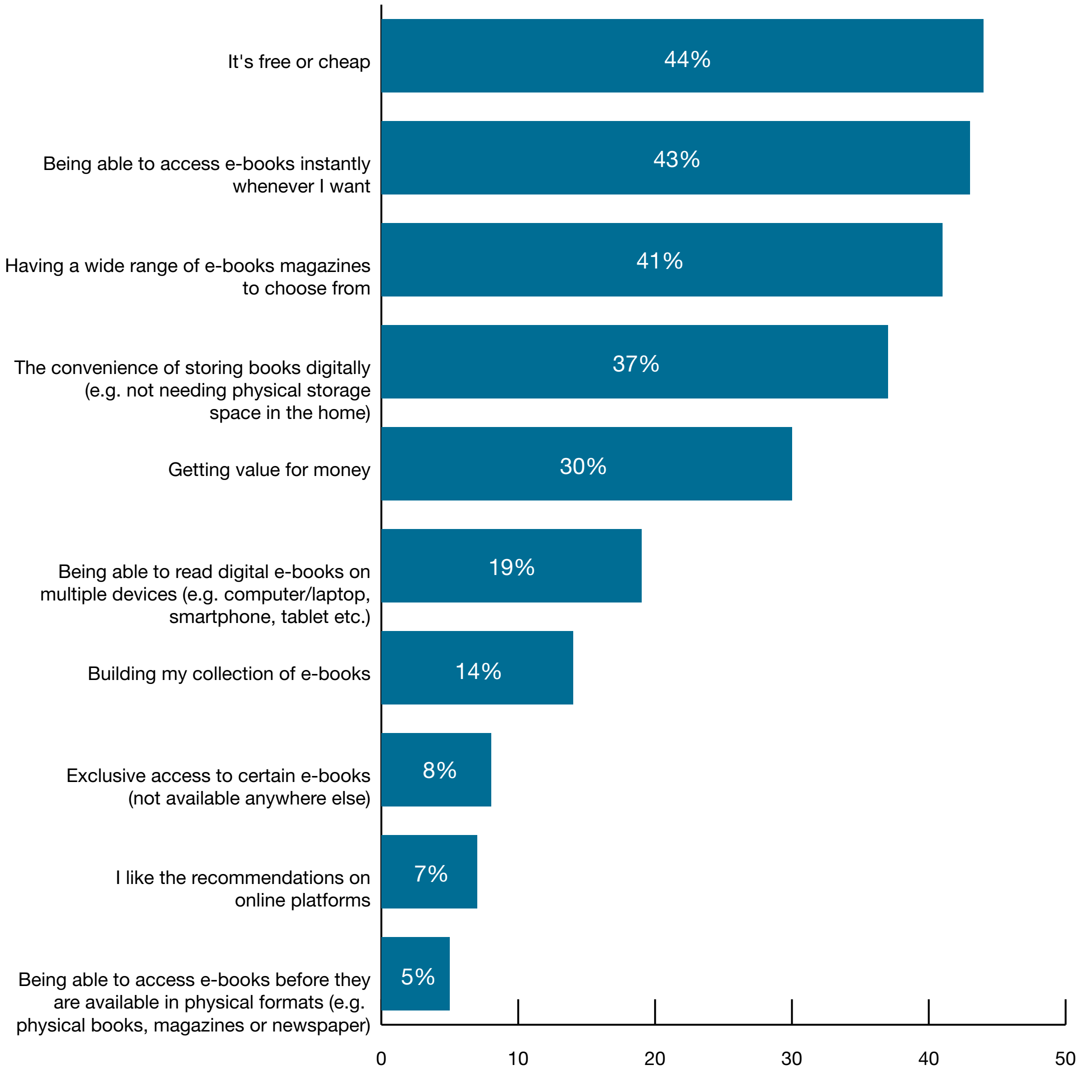
Base: n=1,295 (purchased physical copies of books)

Understanding online consumption of e-books

To better understand the drivers of online consumption, those who had accessed e-books in the previous 3 months were asked to select their top three reasons for doing so online.

- **Cost** was an important factor, with nearly half (44%) accessing e-books online because "It's free or cheap".
- Other prominent reasons related to being able to **access** everything "whenever" they wanted (43%), having a wide range of content to choose from (41%) or the **convenience** of storing content digitally (37%).

G4. What are the main reasons that you choose to access e-books online (i.e. downloading or streaming) Please select your top 3. (%)



Base: n=1,097 (downloaded or streamed e-books in the past 3 months)

Male respondents	Female respondents
1. It's free or cheap (40%) 2. Being able to access e-books instantly whenever I want (40%) 3. Having a wide range of e-books to choose from (39%)	1. It's free or cheap (48%) 2. Being able to access e-books instantly whenever I want (46%) 3. Having a wide range of e-books to choose from (43%)

Aged 12-15	Aged 16-24
1. Having a wide range of e-publications to choose from (36%) 2. It's free or cheap (31%) 3. Getting value for money (30%)	1. Being able to access e-books instantly whenever I want (43%) 2. It's free or cheap (39%) 3. Having a wide range of e-books to choose from (36%)
Aged 25-34	**Aged 35-44**
1. It's free or cheap (42%) 2. Having a wide range of e-publications to choose from (40%) 3. Being able to access e-books instantly whenever I want (38%)	1. Being able to access e-books instantly whenever I want (40%) 2. The convenience of storing books digitally (e.g. not needing physical storage space in the home) (38%) 3. It's free or cheap (36%)
Aged 45-54	**Aged 55+**
1. Having a wide range of e-books to choose from (51%) 2. It's free or cheap (45%) 3. Being able to access e-books instantly whenever I want (44%)	1. It's free or cheap (52%) 2. Being able to access e-books instantly whenever I want (48%) 3. Having a wide range of e-books to choose from (43%)

Qualitative insights

For many, the online consumption of e-books was a **supplement to reading physical publications**. Online sources such as Project Gutenberg, Pigeonhole and Amazon were used because **they were free, or did not include any additional cost** (in the case of an Amazon subscription). These sources have a large number of free e-books, leading some respondents **to rarely use other means**. However, when in search of a specific e-book, or an e-book on a specific subject, respondents would use links from friends, file sharing sites and internet searches for free versions.

- *"I use Pigeonhole primarily because the books are free, but also because they are generally by well-known authors and are good quality."* - Female, 25-34

- *"I use my friend's Amazon account for any free kindle books I may be interested in. I also use an online website for free by publishers. I have in the past used file sharing."* - Female, 25-34

Respondents tended to **prefer the experience of reading a physical book**. However, the perceived **lack of or lower costs** associated with e-books played a key role in attracting them.

- *"I'd always choose a hard copy over an e-book as I prefer to physically own the book. The only reason I use e-books is because they're often free."* - Female, 25-34

- *Whilst I am more driven to traditional books, e-books have offered a good alternative."* - Female, 25-34

- *"I often search for e-books when I want to read books for free."* - Male, 45-54

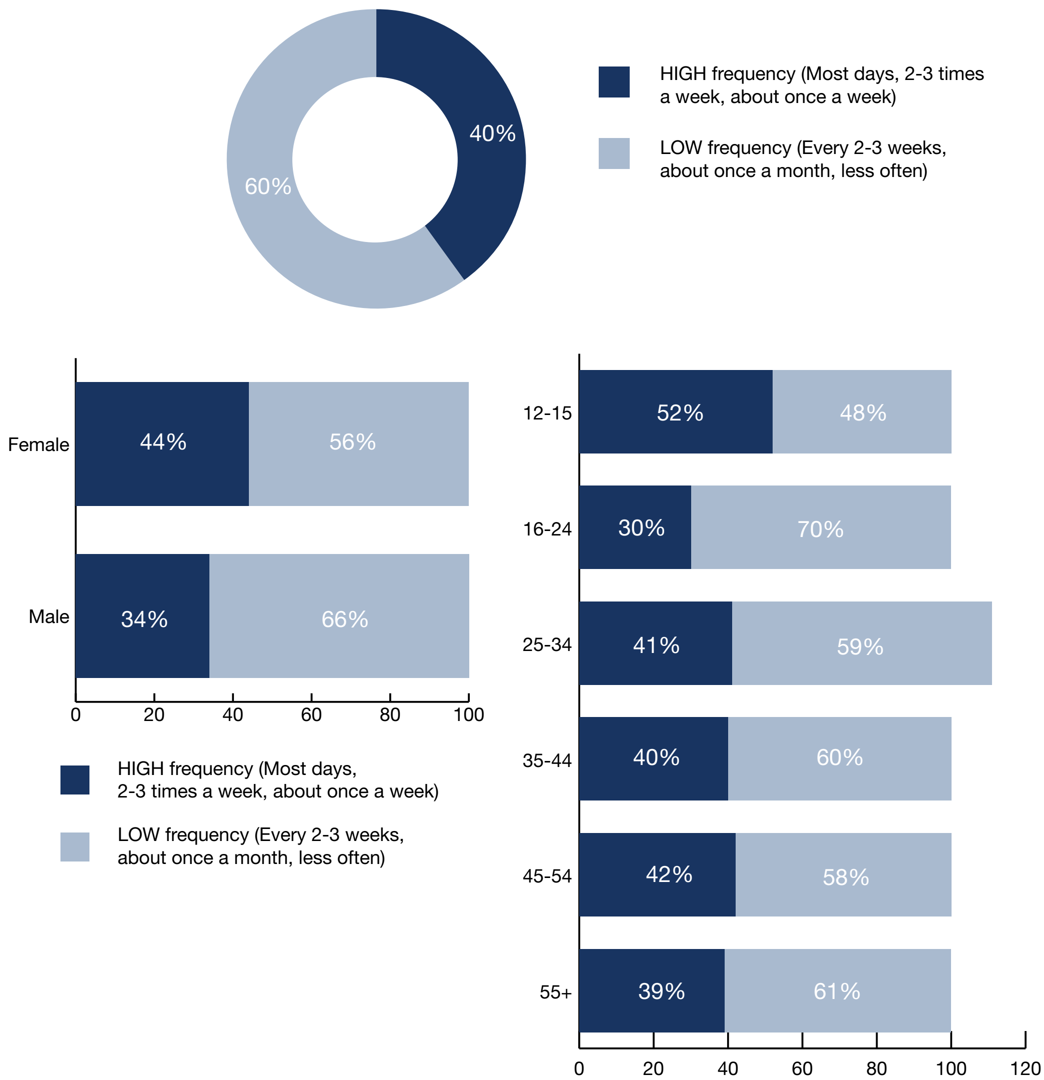
Downloading/accessing e-books

The 22% who had downloaded/accessed e-books during the previous 3 months were asked more questions around frequency, volume and sources used.

Frequency and volume of downloading e-books

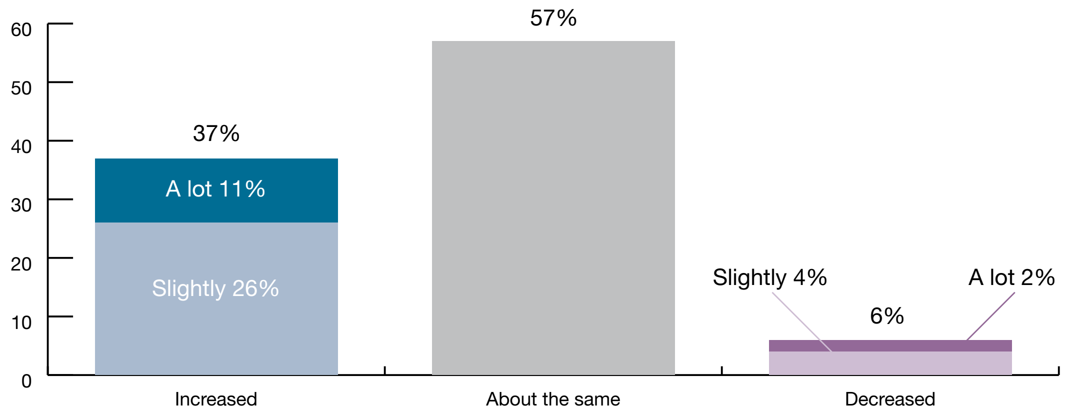
- Four in ten (40%) of those who downloaded/accessed e-books did so frequently (i.e. at least once a week).
- The number of e-books downloaded/accessed since the COVID-19 pandemic had increased for 37% of respondents. Over half (57%) said that the number had remained the same with relatively few saying it had decreased (6%).
  - Before COVID-19, respondents had downloaded/accessed, on average, 13 e-books every three months.
  - During the previous three months the amount they had downloaded had increased to, on average, 17 e-books.

G5. Generally, how often do you download or access e-books through the internet? (%)



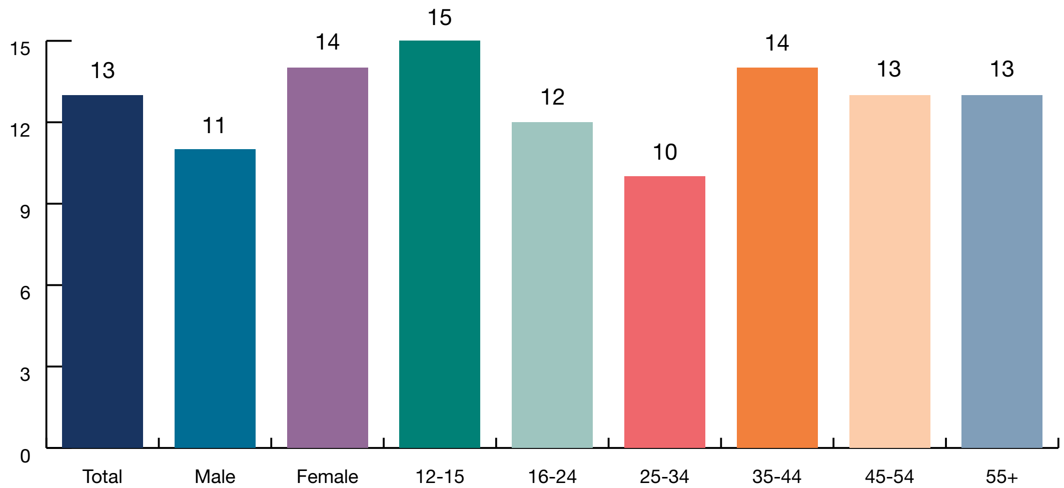
Base: n=1,097 (downloaded/accessed e-books in the past 3 months)

G6. Since the coronavirus (COVID-19) outbreak, would you say the number of e-books you have downloaded or accessed has?

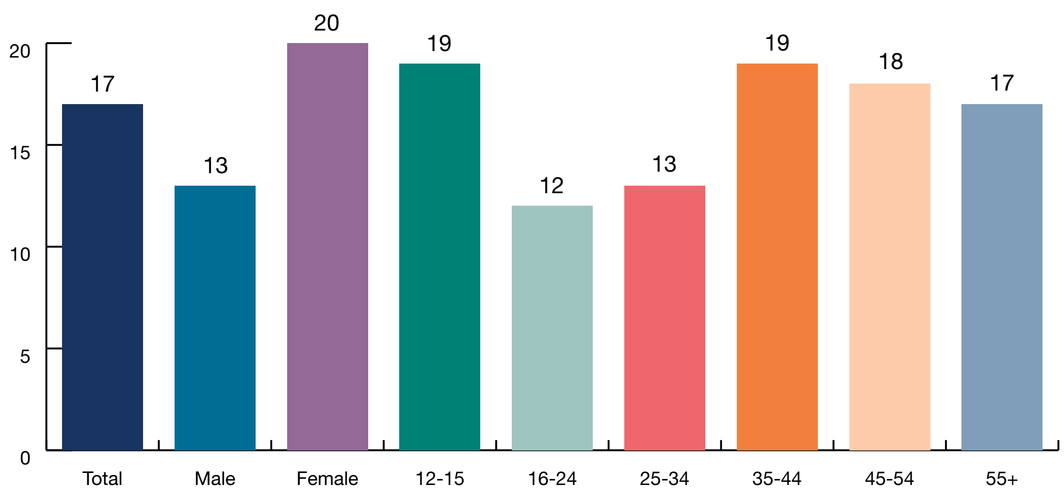


Base: n=1,097

G7. Before the coronavirus outbreak, how many e-books would you say you used to download or accessed in a 3 month time period?



G8. In the past 3 months how many e-books did you download or access through the internet?



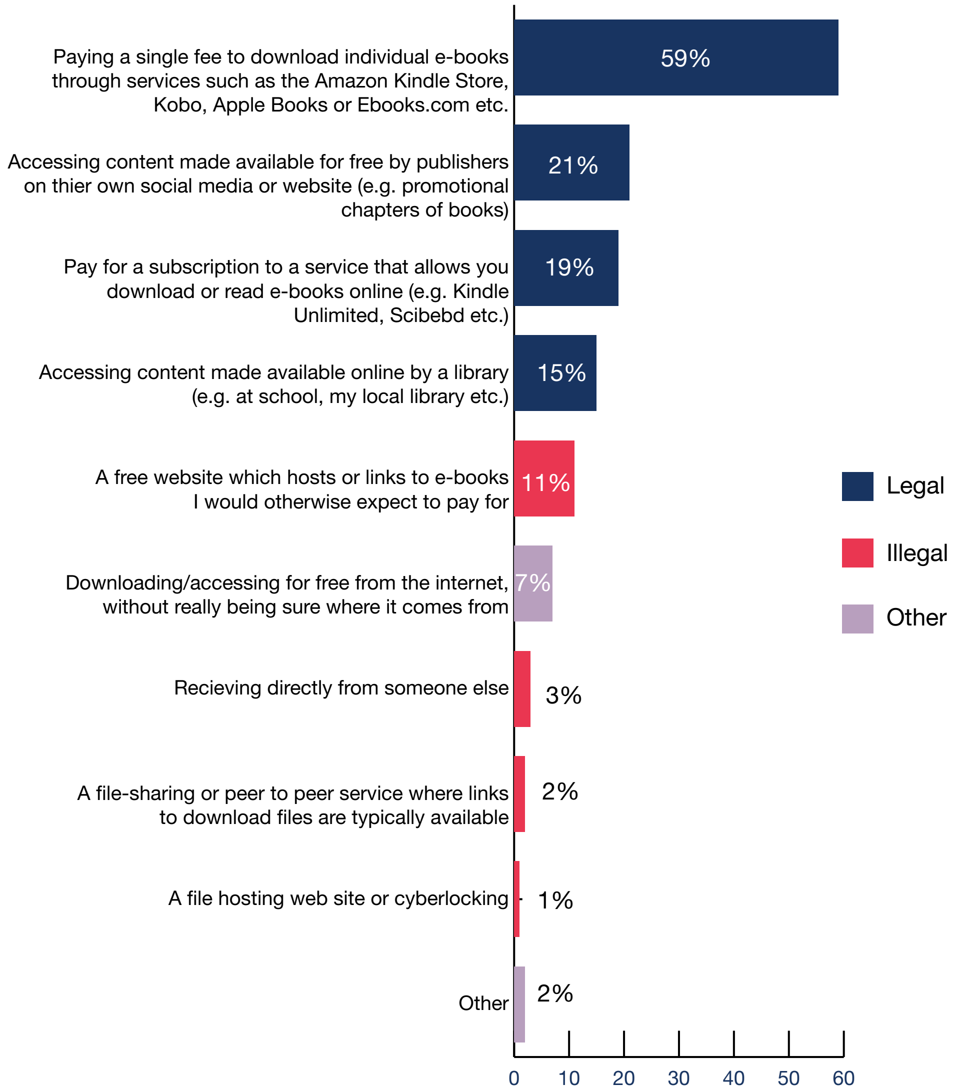
Base: n=1,011-1,085 (downloaded or streamed/accessed e-books in the past 3 months)

Sources of accessing e-publications

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could access e-books. An ‘unknown’ option was also provided to serve as a catch-all for those who were unsure of the exact source.

- The most commonly used sources were **legal** ones. The most popular, by a considerable margin, was “Paying a single fee to download individual e-books through services such as the Amazon Kindle Store” (59%).
- This was followed by “Accessing content made available for free by publishers on their own social media or website” (21%), “Pay for a subscription to a service that allows you download or read e-books online” (19%) and “Accessing content made available online by a library” (15%).
- The most used illegal source was “a free website which hosts or links to e-books I would otherwise expect to pay for” (11%). No other illegal source was selected by more than 3%.

G9. Which of the following have you used to download or access e-books in the past 3 months? (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
Paying a single fee to download individual e-books through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks.com etc.	59%	59%	46%	61%	59%	64%	56%	59%
Pay for a subscription to a service that allows you download or read e-books online (e.g. Kindle Unlimited, Scribd etc.)	20%	18%	28%	22%	24%	22%	20%	14%
Accessing content made available for free by publishers on their own social media or website (e.g. promotional chapters of books)	20%	22%	20%	20%	24%	19%	22%	20%
A free website which hosts or links to e-books I would otherwise expect to pay for	10%	11%	14%	11%	7%	10%	12%	13%
Accessing content made available online by a library (e.g. at school, my local library etc.)	10%	20%	9%	25%	15%	11%	16%	15%
Downloading/accessing for free from the internet, without really being sure where it comes from	8%	5%	16%	10%	10%	5%	2%	6%
Receiving directly from someone else	4%	3%	7%	5%	5%	5%	2%	1%
A file-sharing or peer to peer service where links to download files are typically available	4%	1%	7%	1%	2%	2%	4%	1%
A file hosting web site or cyberlocker	1%	1%	2%	0%	1%	2%	1%	0%
Other	5%	5%	2%	2%	1%	5%	3%	8%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=1,097 (downloaded or accessed e-books during the past 3 months)

Downloading/accessing for free from the internet, without really being sure where it comes from

Those unsure of the source of their e-books were asked, *in a new question this wave,* to explain more about how they accessed them in their own words.

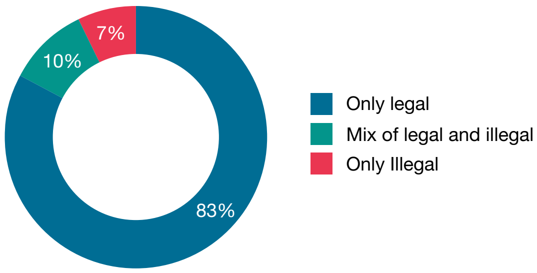
A variety of different sources were used to access e-books, with a Google search for their desired e-book being the most common method. Some respondents did also frequently visit platforms that had a collection of e-books available. Among these sites were Project Gutenberg and Bookhub.

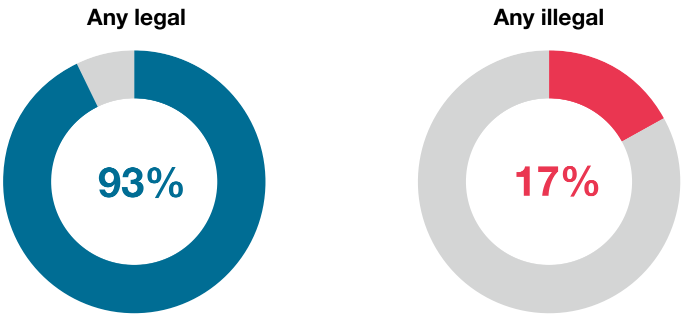
Legality of e-book access

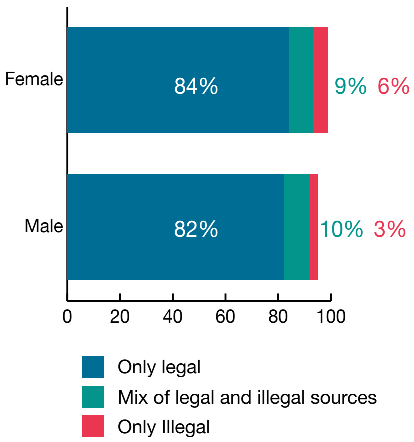
To better understand the distribution of sources across legal and illegal categories, those who had accessed e-books in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

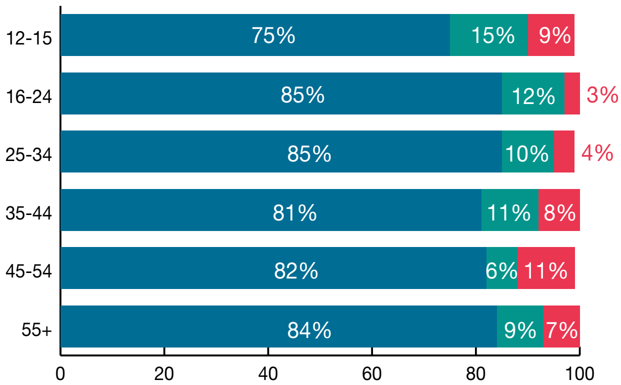
The answer option "downloading/accessing for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

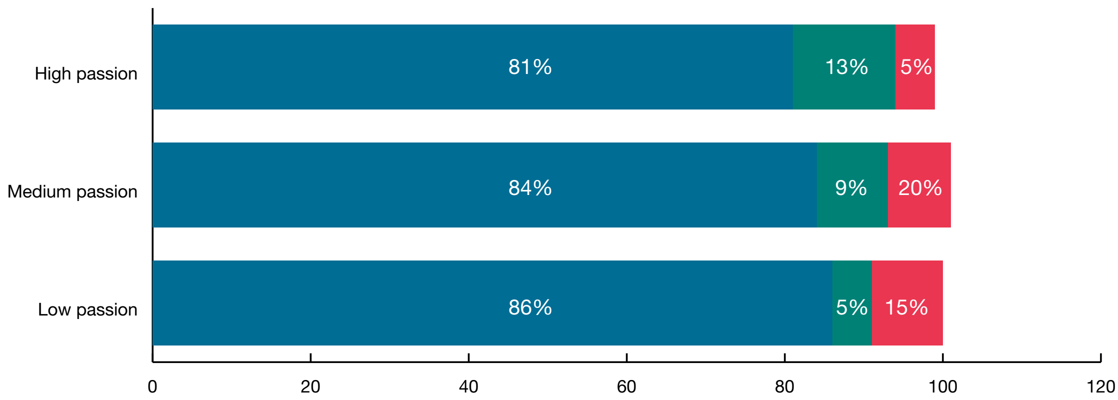
- Legal:
  - Overall 93% had used at least one legal source to access e-publications.
  - **83%** had used legal sources only.
- Illegal:
  - **17%** had used at least one illegal source to access e-publications.
  - **7%** had used illegal sources only to download e-publications.
- Mixed:
  - **10%** had used a mix of legal and illegal sources.











G10. And how is the way you download or access e-books typically split across the following sources?

	Source	Average % of usage split	Average downloads
Legal	Paying a single fee to download individual e-books through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks.com etc.	48%	7
	Pay for a subscription to a service that allows you download or read e-books online (e.g. Kindle Unlimited, Scribd etc.)	13%	3
	Accessing content made available for free by publishers on their own social media or website (e.g. promotional chapters of books)	11%	2
	Accessing content made available online by a library (e.g. at school, my local library etc.)	9%	1
Illegal	A free website which hosts or links to e-books I would otherwise expect to pay for	7%	1
	A file-sharing or peer to peer service where links to download files are typically available	1%	0
	Receiving directly from someone else	1%	0
	A file hosting web site or cyberlocker	0%	0
Other	Downloading / accessing for free from the internet, without really being sure where it comes from	4%	0
	Other	4%	1

Base: n=1,085 (downloaded/accessed e-publications in the past 3 months)

Qualitative insights

In the Online Community, most respondents mentioned having a **go-to platform for e-books**. These platforms were almost always legal. As previously mentioned, Project Gutenberg, Amazon, and Pigeonhole were among the most popular. Respondents tended to venture to other means of access only when they were **looking for a specific e-book** not available on their go-to source. These alternate means of access were **often illegal** and included file sharing sites, links from friends, and internet searches for free versions. It was apparent that respondents were often not entirely sure on whether a source was legal or illegal.

- *"I use an app/website called Pigeonhole which provides access to free pre-publication e-books."* - Female, 25-34
- *"I almost always search for free e-books and online publications through some websites and also use links provided by my friends or employees on social media."* - Male, 45-54

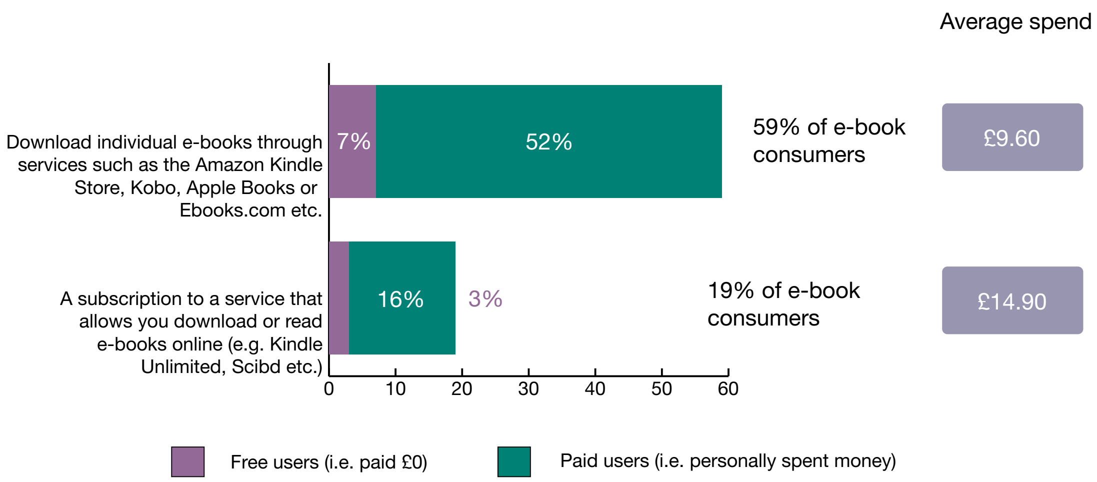
Paying for e-books

In a new question this wave, those who had used a paid source to either download or access e-books were asked how much they had personally spent on each source.

- Six in ten (59%) e-book consumers said that they had downloaded individual e-books through services such as the Amazon kindle store during the previous three months, with most making a personal contribution towards a subscription (52% of total e-book consumers) each month. They spent, on average, £9.60 per month.

- Two in ten (19%) e-book consumers had a subscription to a service which allows them to download or read e-books. They spent, on average, more than that spent on downloading individual e-books (£14.90 each month).

G11. Approximately how much do you personally spend each month on the below sources of streaming or downloading e-books? (Proportion of e-book consumers over past three months using a paid source and average amount spent each month by users of that source)



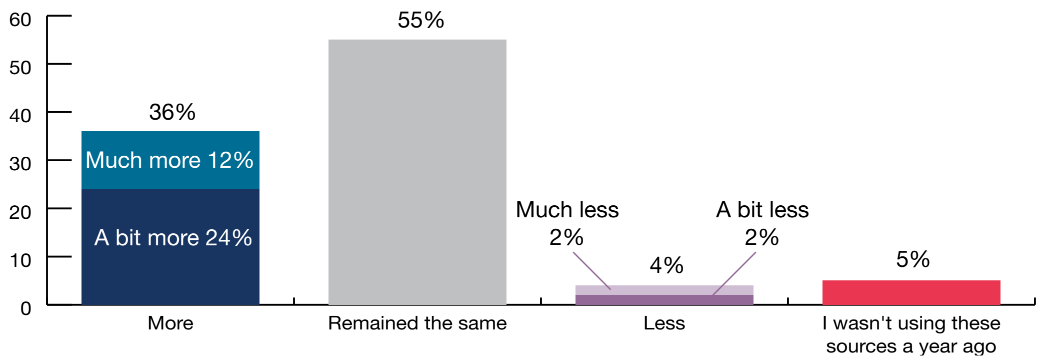
Base: n=1,097 (streamed and/or downloaded e-books), n=82-749 (those who used each source to download/access e-books))

Change in use of illegal sources

In a new question this wave, those who had used an illegal source to download or access e-books were asked how the use of these sources compares to the same point a year ago.

- Respondents were most likely to say that their usage had remained the same (55%). This was followed by those who were using them more (36%) with relatively small proportions saying their usage was less (4%) or that they weren't using these sources a year ago (5%).

G12. You said you download or stream e-books using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=173 (those who downloaded or accessed e-books using illegal sources)

Respondents whose usage of illegal sources had changed since the previous year were asked a follow up open text question about the reasons for this change.

Those who were using these sources **more** than they were a year ago highlighted that they had more time on their hands due to lockdown and that their normal sources for books (libraries and bookshops) were closed. The fact that these illegal sources do not cost any money was also a key motivation for many, both before and during lockdown.

- *"I sometimes discover new authors whose books I have never read before, plus it saves me money as I read a lot."* - Female, 55+
- *"Libraries and book shops are closed."* - Male, 55+
- *"Because there are some books that I wouldn't purchase physically but still want to read."* - Female, 25-34
- *"Online reading is much more convenient especially in the current situation."* - Female, 16-24
- *"Reading can be very costly, so I'm always looking for ways to keep cost down."* - Female, 55+

Those who were using these sources **less** than they were a year ago highlighted that their life circumstances had changed, resulting in lower interest in and lesser need for digital e-book content. Some specific changes mentioned were simply becoming busier or being unable to exchange memory sticks or other forms of sharing digital content with friends in person owing to the COVID-19 pandemic.

- *"I'm too busy at home now."* - Female, 55+
- *"We're unable to see people to swap digital content due to covid-19."* - Male, 35-44

The small number of respondents who had **started using** these illegal sources since the same point last year highlighted that the lack of cost or delivery time (in contrast to books ordered online) made the sources more attractive, especially with the added free time and uncertain economic conditions. Other respondents had only recently become aware of the sources, through a friend or an email list.

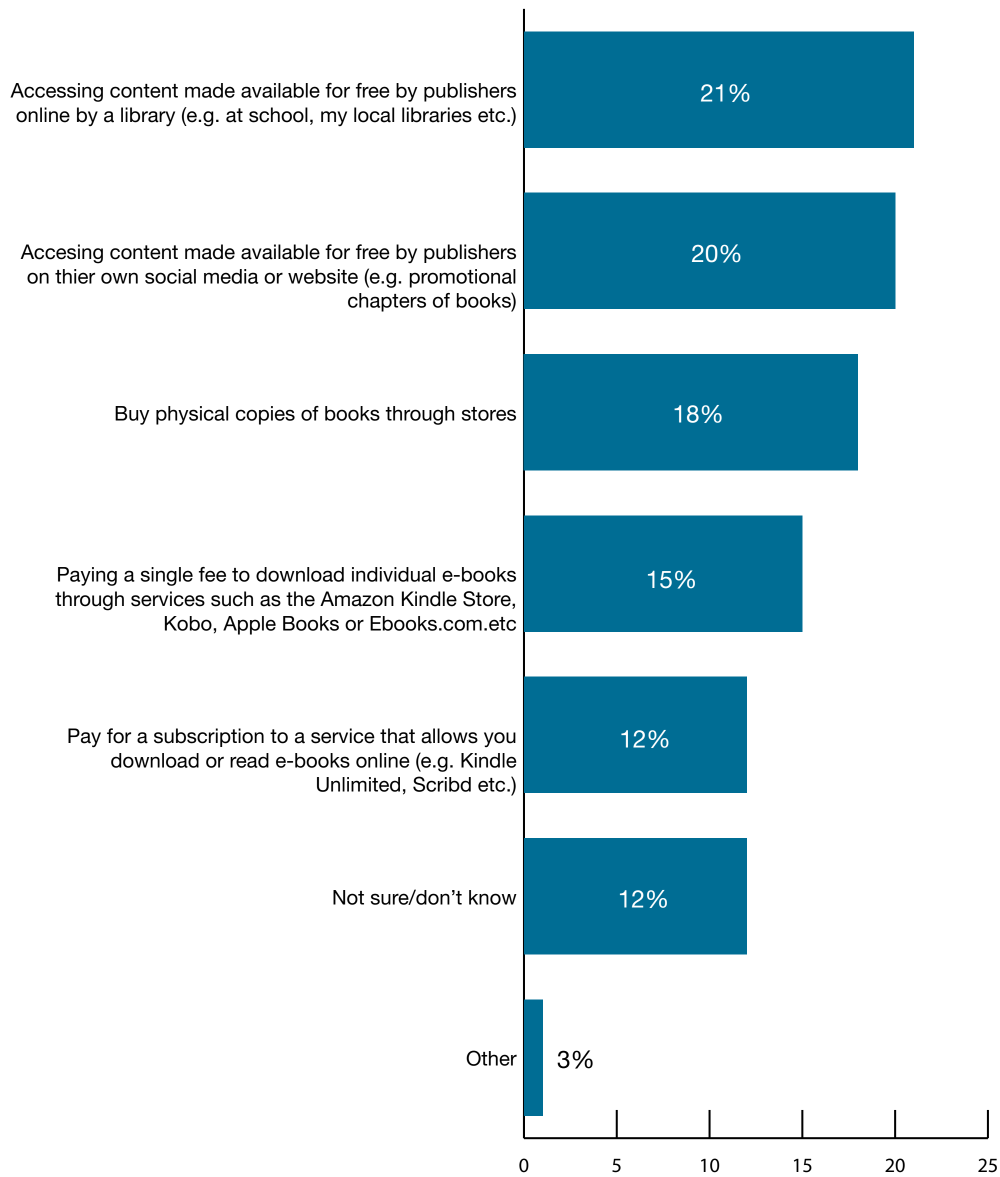
- *"Due to lockdown and needing more stuff to read."* - Female, 45-54
- *"You can get them for free."* - Male, 45-54
- *"Someone suggesting a book and sending me the e-book."* - Female, 35-44
- *"To be able to reach out for books cheaply and quickly."* - Male, 16-24

Alternatives to infringement

Those who had used illegal sources to access e-books were asked which *single* legal source they would use if they could no longer access them illegally.

- Respondents were most likely to indicate that they would access content "made available online by a library" (21%) or "made available for free by publishers on their own social media or website" (20%).
- It is, however, encouraging to note that paid options accounted for almost half (46%) of responses. This was split between buying "physical copies of books through stores" (18%), "paying a single fee to download individual e-books" (15%) and paying "for a subscription to a service or publisher that allows you to download or read e-books" (12%).

G13. If e-books were no longer available to download or access via these sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
Accessing content made available online by a library (e.g. at school, my local library etc.)	20%	23%	22%	48%	16%	34%	7%	18%
Accessing content made available for free by publishers on their own social media or website (e.g. promotional chapters of books)	21%	19%	23%	5%	31%	16%	30%	15%
Buy physical copies of books through stores	13%	23%	23%	23%	31%	7%	23%	14%
Paying a single fee to download individual e-books through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks.com etc.	17%	14%	32%	11%	15%	11%	13%	17%
Pay for a subscription to a service that allows you download or read e-books online (e.g. Kindle Unlimited, Scribd etc.)	14%	11%	0%	13%	7%	15%	7%	19%
Not sure / don't know	14%	9%	0%	0%	0%	14%	20%	17%
Other	1%	1%	0%	0%	0%	3%	0%	2%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=173 (downloaded or accessed e-publications illegally)

Qualitative insights

Though e-books played a supplementary role to reading physical copies of books for most, many expressed **concerns over illegal sources becoming unavailable.** This concern was tied to the idea that they would then have to **pay for access to e-books**, thus eliminating their main attraction (the perceived cost-effectiveness), as most would rather have a physical copy if paying. Respondents therefore expressed a **hesitancy about starting to pay for e-books**, suggesting that they would likely opt to spend less time reading them instead.

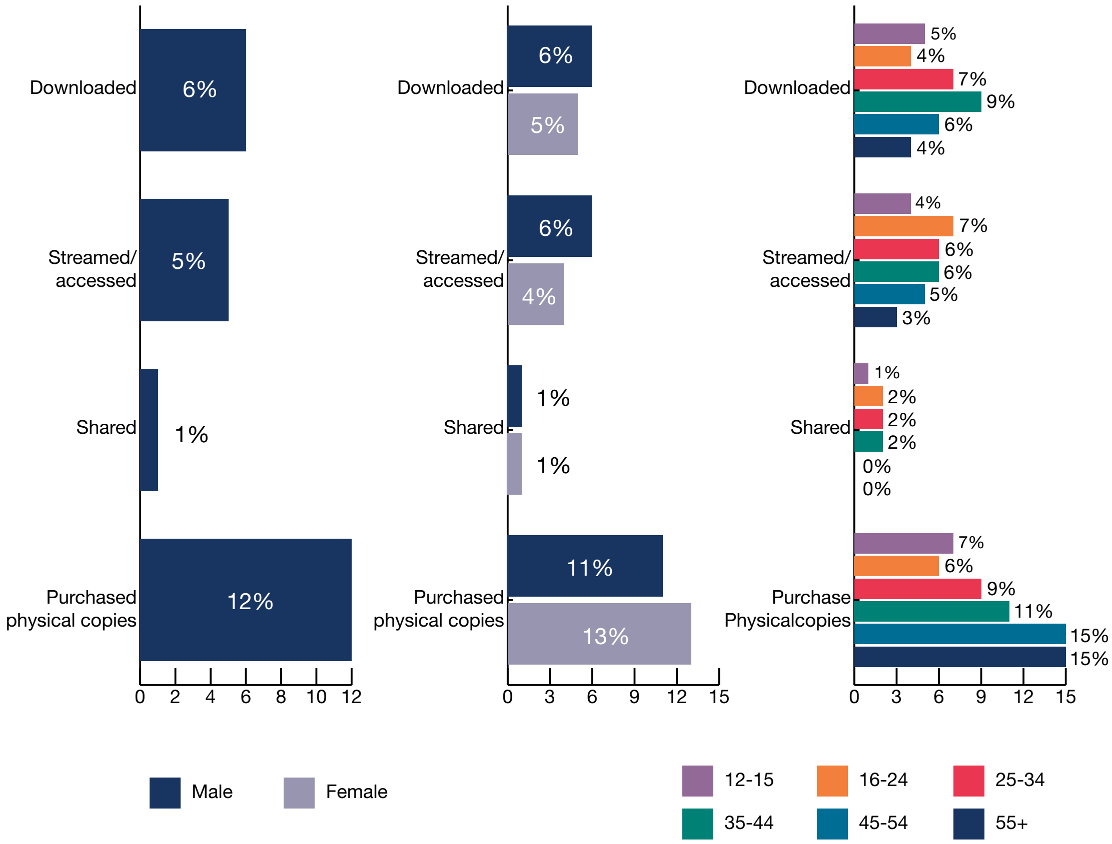
- *"I would definitely feel sad if I had to pay [to access e-books] as I do currently get free ones."* - Female, 25-34
- *"The time I spend reading e-books would be considerably reduced in favour of reading hard copies."* - Female, 25-34
- *"Buying books, especially in a foreign language, is quite expensive, in which case it is now difficult to imagine a life without e-books. Another important downside is the need to wait for a paper book for some time . . . Now I have access to books at a better price (because I can find e-books for free) in a split second, and this is the main reason for using e-books."* - Male, 45-54

Digital magazines

17% had engaged with magazines in the previous 3 months (either by downloading, streaming or sharing digital magazines or purchasing physical copies).

- The **most common method of access was purchasing physical copies** (12%).
- This was followed by downloading (6%) and then streaming/accessing online (5%).
- The older age groups (i.e. those aged 45-54 and 55+) were, in some instances, almost twice as likely to have purchased a physical copy compared with those aged 12-34.

G14. Have you downloaded/streamed/shared[9] any digital magazines or purchased physical copies of any publications in the past 3 months?



Base: 2020 n=5,004 (total sample)

9 The definition of 'shared' was provided as: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in the answer option."*

Qualitative insights

Many of the respondents involved in the online discussion about digital magazines were **highly engaged in reading various publications,** including magazines. However, magazines themselves were often not the focus of people's reading but a component among many other literary formats. Rather than being passionate about digital magazines as a category, most had a particular interest that magazines allowed them to explore further.

- *"I like to learn from reading and I like to understand more about things."* - Male, 25-34

Despite having high levels of passion for reading in general, most **did not spend more time reading digital magazines during the COVID-19 lockdown. Rather than search out new magazines, respondents tended to stick with the magazines that they already read prior to lockdown. For some, the COVID-19 pandemic actually meant they had less time to read digital magazines** as lockdown prevented them from being in some of the situations where they frequently read them. This includes traveling, commuting and waiting for appointments.

- *"In the past few months since the impact of COVID-19, there have been no changes in how much I actively search for new digital magazine content online - there is so much content that I already consume that I don't feel the need to search for new magazines."* - Male, 35-44

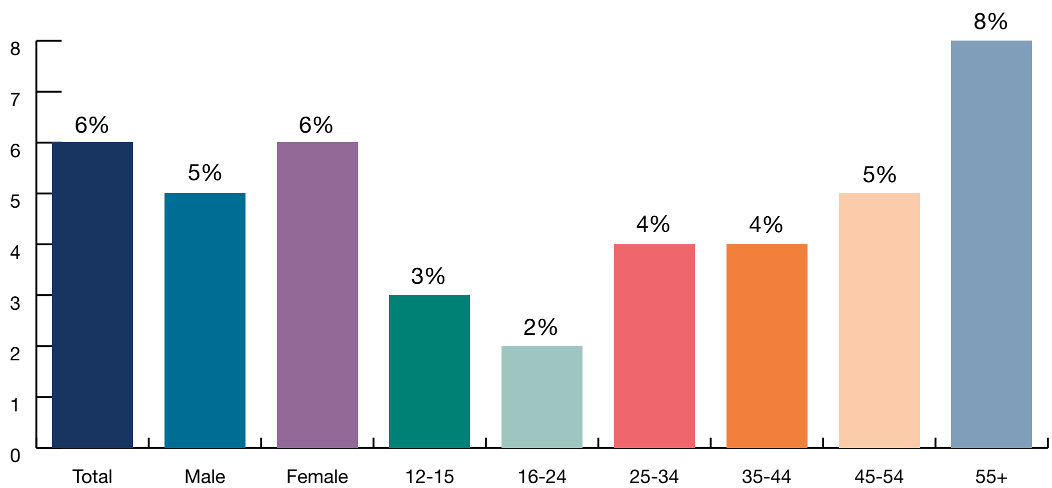
- *"I'd often read them when I was waiting at the station, or in the train, or in the GP practice waiting for an appointment."* - Female, 35-44

Physical purchasing of magazines

The 12% of respondents who had purchased physical copies of magazines during the previous 3 months were asked a question around the number of purchases made.

- Respondents had purchased an average of 6 magazines over the previous three months. Those aged 55+ had purchased 8 magazines over the past three months while those in younger age groups had purchased between 2-5.

G15. In the past 3 months, how many magazines have you purchased physical copies of? (Average purchases)

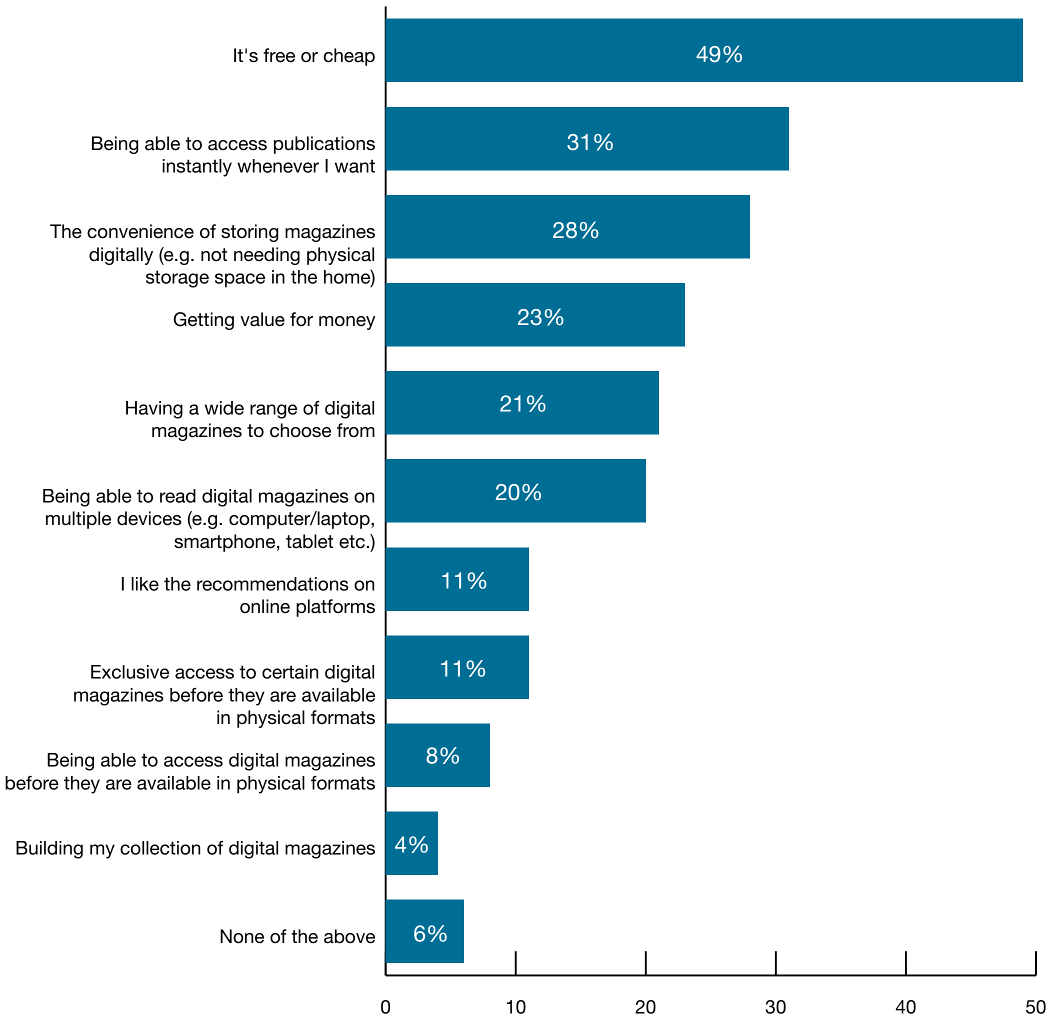


Understanding online consumption of digital magazines

To better understand the drivers of online consumption, those who had accessed digital magazines in the previous 3 months were asked to select their top three reasons for doing so.

- **Cost** was an important factor, with nearly half (49%) accessing digital magazines online because "It's free or cheap".
- Other prominent reasons related to being able to **access** everything "whenever" they wanted (31%) or the **convenience** of storing content digitally (28%).

G16. What are the main reasons that you choose to access digital magazines online (i.e. downloading or streaming) Please select your top 3. (%)



Base: n=1,097 (downloaded or accessed digital magazines in the past 3 months)

Male respondents	Female respondents
1. It's free or cheap (45%) 2. Being able to access publications instantly whenever I want (29%) 3. The convenience of storing magazines digitally (e.g. not needing physical storage space in the home) (28%)	1. It's free or cheap (54%) 2. Being able to access publications instantly whenever I want (32%) 3. The convenience of storing magazines digitally (e.g. not needing physical storage space in the home) (28%)

Aged 12-15	Aged 16-24
1. It's free or cheap (34%) 2. Being able to read digital magazines on multiple devices (e.g. computer/laptop, smartphone and tablet etc.) (24%) 3. Being able to access publications instantly whenever I want (23%)	1. It's free or cheap (55%) 2. Being able to access publications instantly whenever I want (38%) 3. Having a wide range of digital magazines to choose from (34%)
Aged 25-34	**Aged 35-44**
1. It's free or cheap (53%) 2. Being able to access publications instantly whenever I want (28%) 3. The convenience of storing magazines digitally (e.g. not needing physical storage space in the home) (27%)	1. It's free or cheap (49%) 2. Being able to access publications instantly whenever I want (29%) 3. The convenience of storing magazines digitally (e.g. not needing physical storage space in the home) (27%)
Aged 45-54	**Aged 55+**
1. It's free or cheap (48%) 2. Being able to access publications instantly whenever I want (38%) 3. The convenience of storing magazines digitally (e.g. not needing physical storage space in the home) (33%)	1. It's free or cheap (48%) 2. The convenience of storing magazines digitally (e.g. not needing physical storage space in the home) (30%) 3. Being able to access publications instantly whenever I want (27%)

Qualitative insights

The main attraction of accessing magazines online was noted to be the convenience of the format as well as the lower cost. Being able to access digital magazines on a laptop or smartphone was seen as to make reading magazines **possible/easier while on the go**.

- *"When I travel, I read more - on the plane, beach, train."* - Female, 45-54

Respondents used a variety of sources to access digital magazines. Sources with **large collections of digital magazines** were popular with many. These included online platforms such as Pocketmags and the online collections of local libraries. Going **directly to the publisher's website for access** was also mentioned. Respondents tended to stick to the same sources but would **occasionally try a new one** if sent by a friend or seen on a social media site.

- *"Most of the time I get access on the publisher's website - free access."* - Female, 45-54

- *"I like to use the local library's website. They have really good range, so I can always read something new."* - Female, 35-44

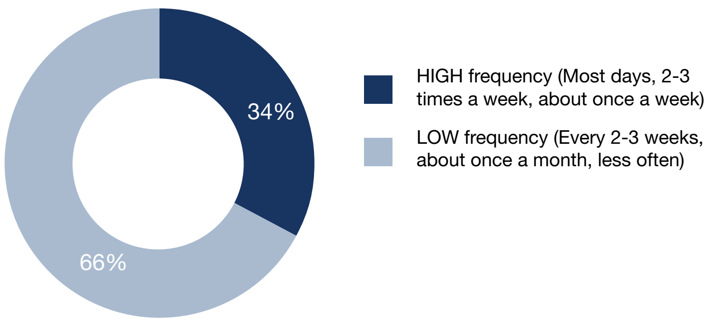
Downloading/accessing digital magazines

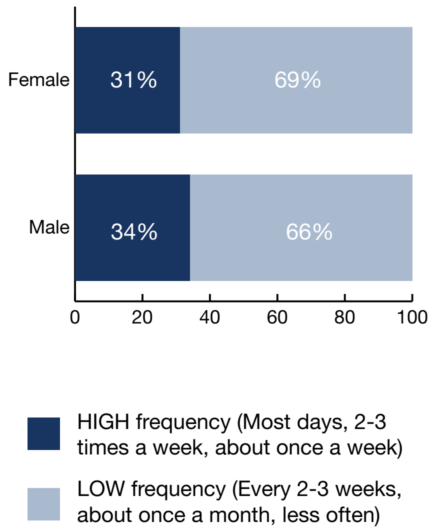
The 22% who had downloaded/accessed digital magazines during the previous 3 months were asked more questions around frequency, volume and sources used.

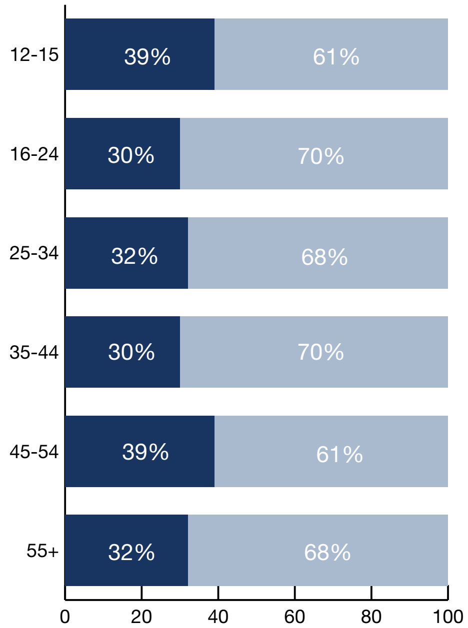
Frequency and volume of downloading digital magazines

- A third (33%) of those who downloaded/accessed digital magazines did so frequently (i.e. at least once a week).
- The number of digital magazines downloaded/accessed since the COVID-19 pandemic had remained the same for two thirds (66%). This was followed by those for whom the number had increased (25%) with relatively few saying it had decreased (9%).
  - Before COVID-19, respondents had downloaded/accessed, on average, 9 digital magazines every three months.
  - During the previous three months the amount they had downloaded/accessed had remained at exactly the same level (i.e. 9).

G17. Generally, how often do you download or access digital magazines through the internet? (%)

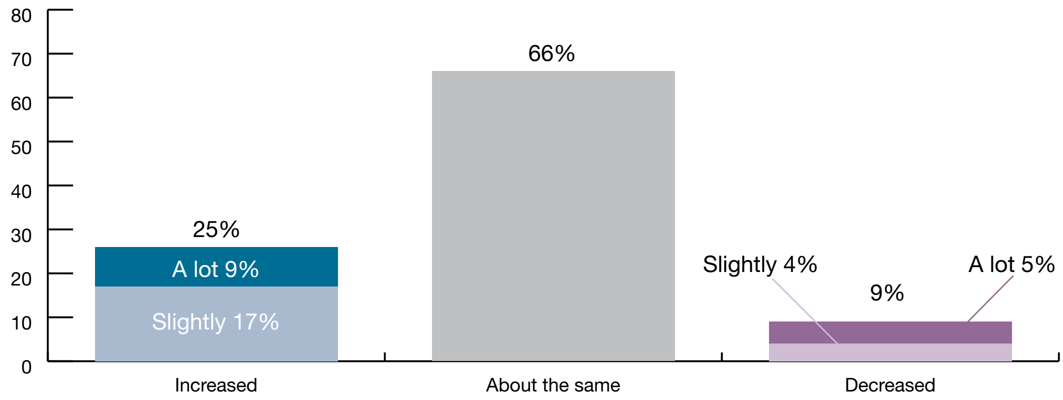






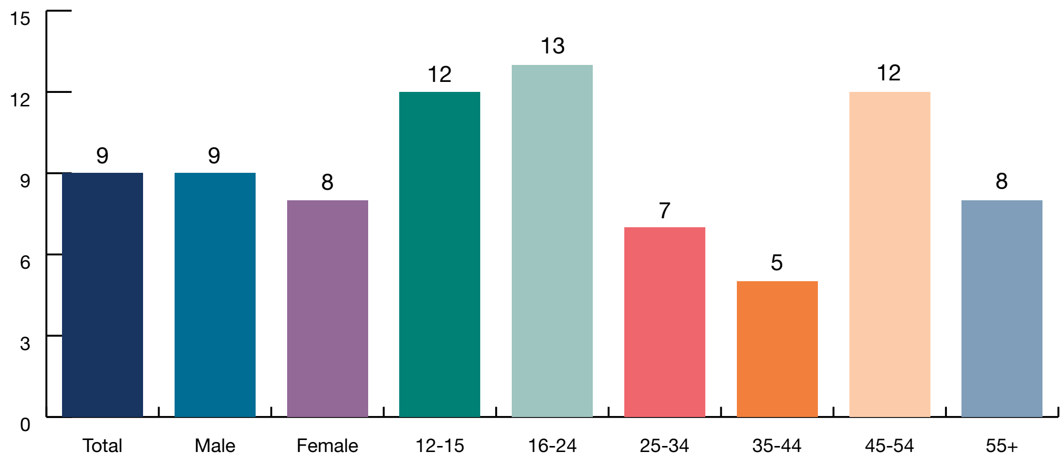
Base: n=414 (downloaded/accessed digital magazines in the past 3 months)

G18. Since the coronavirus (COVID-19) outbreak, would you say the number of digital magazines you have downloaded or accessed has?

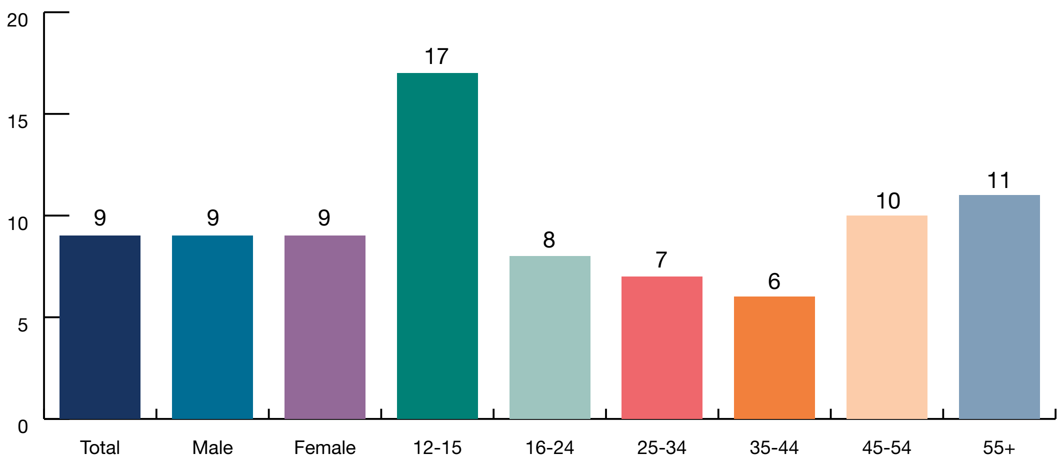


Base: n=414

G19. Before the coronavirus outbreak, how many digital magazines would you say you used to download or accessed in a 3 month time period?



G20. In the past 3 months how many digital magazines did you download or access through the internet?

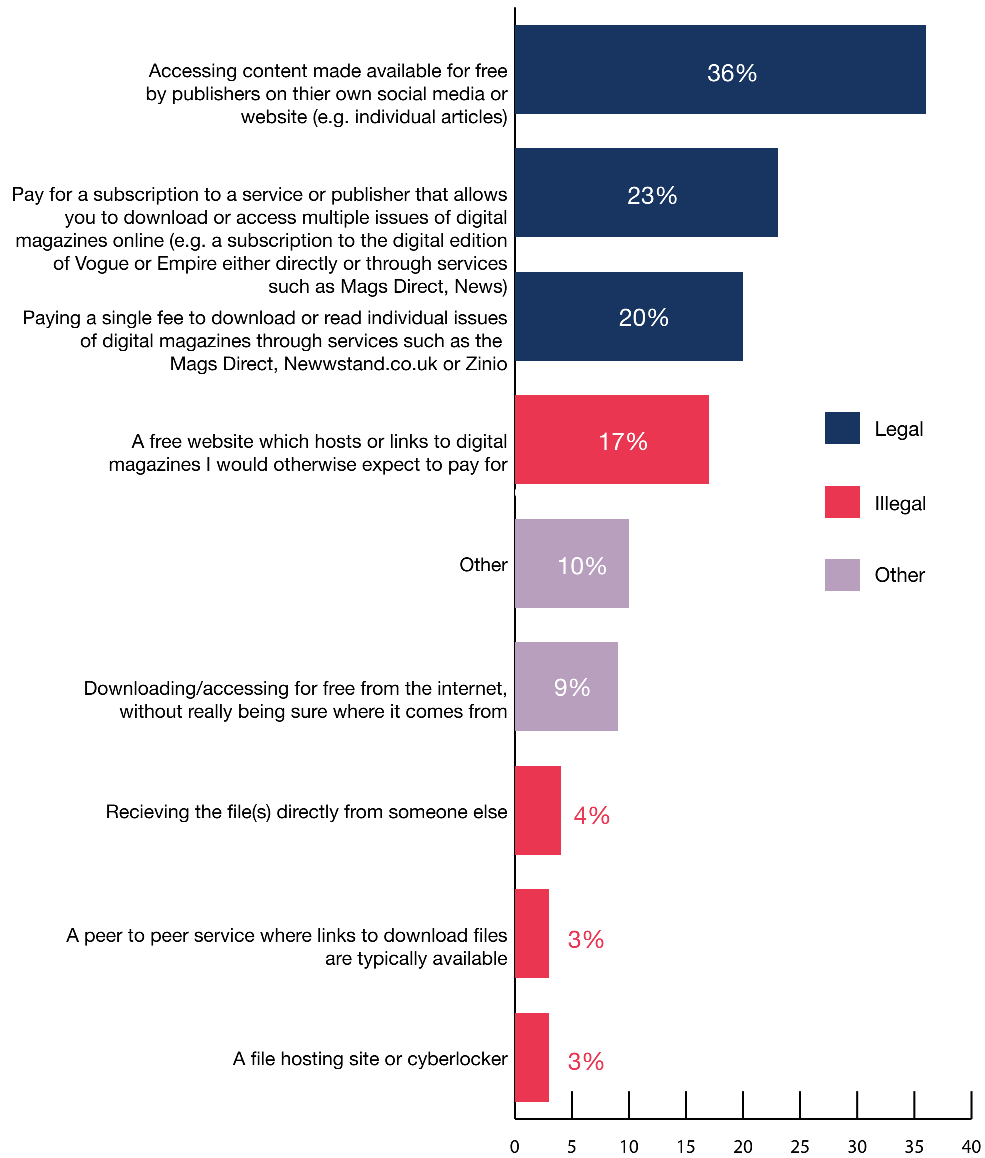


Sources of accessing digital magazines

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could access digital magazines. An 'unknown' option was also provided to serve as a catch-all for those who were unsure of the exact source.

- The most commonly used sources were **legal** ones. The most popular was "Accessing content made available for free by publishers on their own social media or website" (36%).
- This was followed by two paid options: "Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online" (23%) and "Paying a single fee to download or read individual issues of digital magazines" (20%).
- The most used illegal source was "a free website which hosts or links to digital magazines I would otherwise expect to pay for" which, at 17%, was almost on a par with the above legal options. Other than that, no illegal source was selected by more than 4%.

G21. Which of the following have you used to download or access e-books in the past 3 months? (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
Accessing content made available for free by publishers on their own social media or website (e.g. individual articles)	34%	39%	15%	36%	42%	29%	41%	39%
Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online (e.g. a subscription to the digital edition of Vogue or Empire either directly or through services such as Mags Direct, Newsstand.co.uk or Zinio)	26%	19%	31%	26%	16%	22%	24%	25%
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	22%	18%	27%	21%	24%	28%	18%	10%
A free website which hosts or links to digital magazines I would otherwise expect to pay for	14%	21%	19%	18%	14%	20%	19%	16%
Other	9%	10%	4%	3%	12%	6%	5%	18%
Downloading / accessing for free from the internet, without really being sure where it comes from	8%	10%	11%	15%	11%	9%	3%	7%
Receiving the file(s) directly from someone else (e.g. Dropbox, WeTransfer, USB stick)	4%	3%	8%	0%	7%	5%	3%	1%
A file-sharing or peer to peer service where links to download files are typically available	4%	2%	8%	3%	5%	2%	5%	1%
A file hosting web site or cyberlocker	3%	3%	8%	7%	3%	5%	0%	1%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=414 (downloaded or accessed digital magazines during the past 3 months)

Downloading/accessing for free from the internet, without really being sure where it comes from

Those unsure of the source of their digital magazines were asked, *in a new question this wave*, to explain more about how they accessed them in their own words.

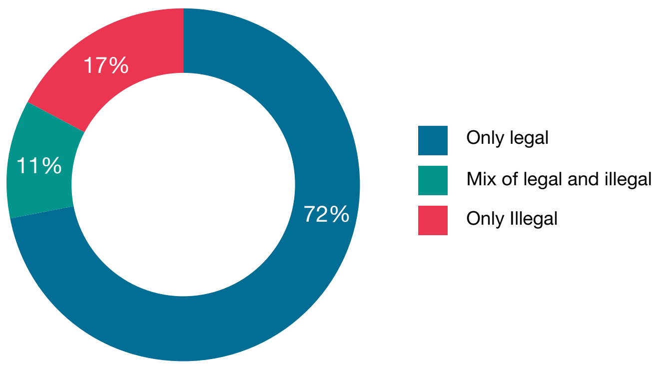
The most common method for accessing a digital magazine was via a search engine such as Google. A couple received help from a friend or partner to access the magazine for them.

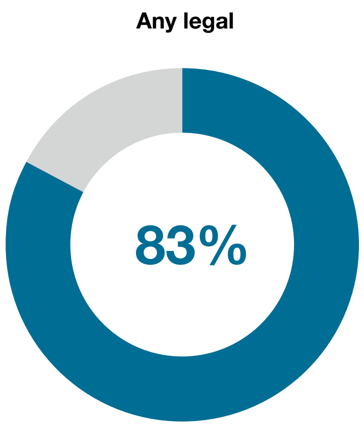
Legality of digital magazine access

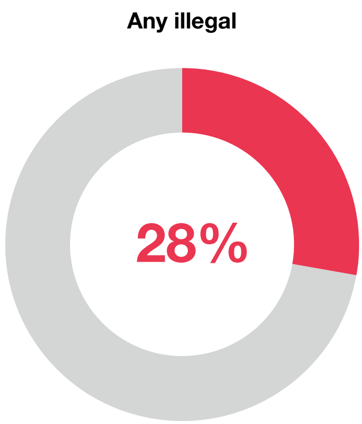
To better understand the distribution of sources across legal and illegal categories, those who had accessed digital magazines in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

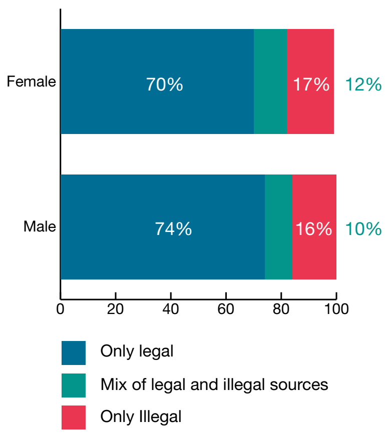
The answer option "downloading/accessing for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

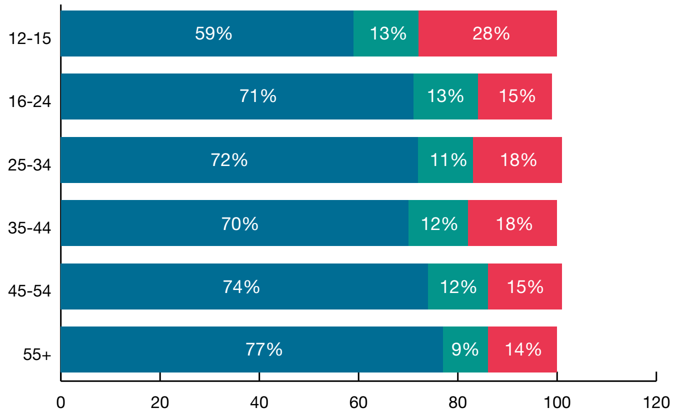
- Legal:
  - Overall 83% had used at least one legal source to access digital magazines.
  - **72%** had used legal sources only.
- Illegal:
  - **28%** had used at least one illegal source to access digital magazines.
  - **17%** had used illegal sources only to download digital magazines.
- Mixed:
  - **11%** had used a mix of legal and illegal sources.

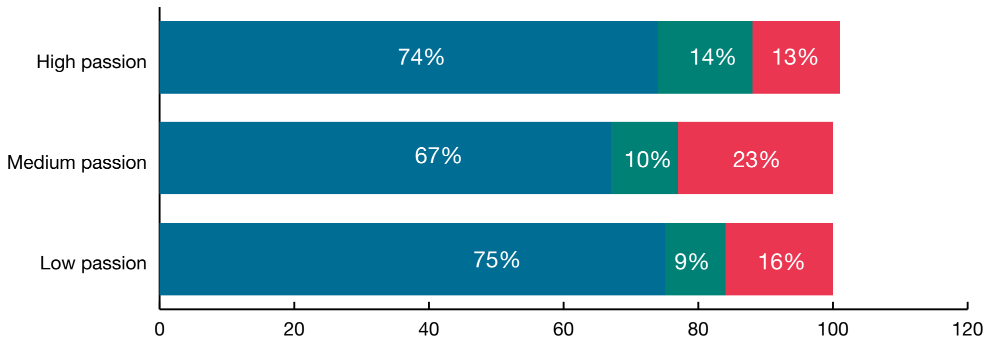












Base: n=353 (those who have downloaded or accessed digital magazines in the past 3 months with those who selected 'other' or 'not sure of source' removed).

G22. And how is the way you download or access digital magazines typically split across the following sources?

	Source	Average % of usage split	Average downloads
Legal	Accessing content made available for free by publishers on their own social media or website (e.g. individual articles)	30%	2
	Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online (e.g. a subscription to the digital edition of Vogue or Empire either directly or through services such as Mags Direct, Newsstand.co.uk or Zinio)	19%	3
	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	17%	2
	A free website which hosts or links to digital magazines I would otherwise expect to pay for	13%	1
Illegal	Receiving the file(s) directly from someone else (e.g. Dropbox, WeTransfer, USB stick)	2%	1
	Bittorrent or another file-sharing or peer to peer service (e.g. uTorrent, eMule) where links to download files are typically available on sites such as The Pirate Bay, Torrentz, or Rarbg	2%	0
	A file hosting web site or cyberlocker (Openload, Zippyshare, Rapidgator etc.)	1%	0
Other	Downloading / accessing for free from the internet, without really being sure where it comes from	7%	0
	Other	9%	1

Base: n=406-414 (downloaded/accessed digital magazines in the past 3 months)

Qualitative insights

Owing to the availability of many **free digital magazines through legal sources,** such as directly from the publisher or from a local library, illegal sources tended to be used less frequently and in a supplementary role.

When respondents did access digital magazines through illegal sources, this was often motivated by an unwillingness to pay for access and an **ambiguity between legal and illegal free sources** when searching for a magazine on the internet. Given the relatively low consumption of digital magazines as opposed to other literary forms such as books, lockdown didn't appear to have any impact on the types of sources used or their frequency.

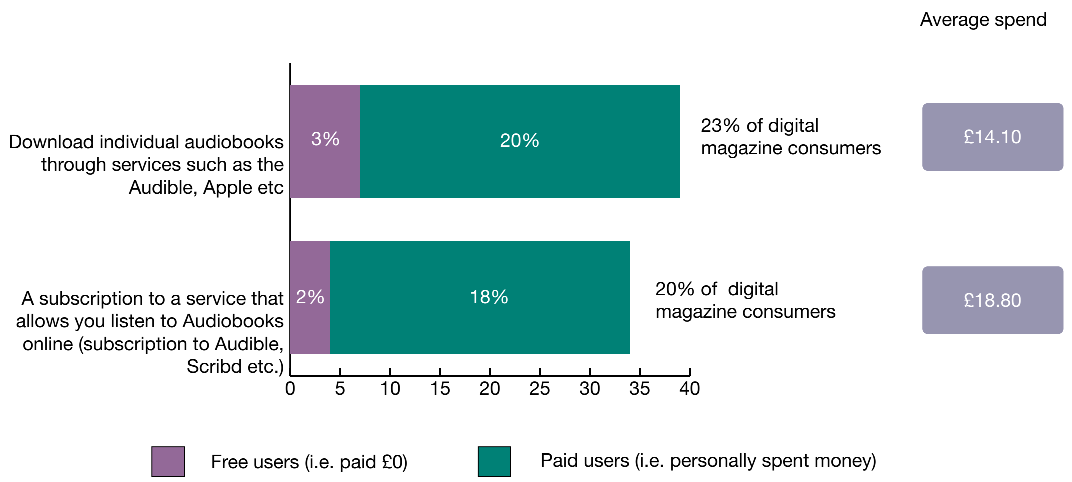
- *"I will use Google to search for recommendations, will browse for some new free sites, because I am not happy to pay for them."* - Female, 35-44
- *"These [websites which host or link to digital magazines that would otherwise be free] are my main way of accessing the digital magazines. I've been doing it for years."* - Female, 45-54
- *"I prefer to spend my money on books, not on magazines. So when I am not able to get a magazine for free from my usual source, I look at getting it another way. There are so many options."* - Female, 34-45

Paying for digital magazines

In a new question this wave, those who had used a paid source to either download or access digital magazines were asked how much they had personally spent on each source.

- Approximately a quarter (23%) of digital magazine consumers said they had a subscription to access multiple issues of digital magazines online during the previous three months. They spent, on average, £14.10 each month.
- A similar proportion (20%) tended to download or read individual issues of digital magazines. They spent more, on average, than that spent on subscription services (£18.80 each month).

G23. Approximately how much do you personally spend each month on the below sources of streaming or downloading digital magazines? (Proportion of digital magazines consumers over past three months using a paid source and average amount spent each month by users of that source)



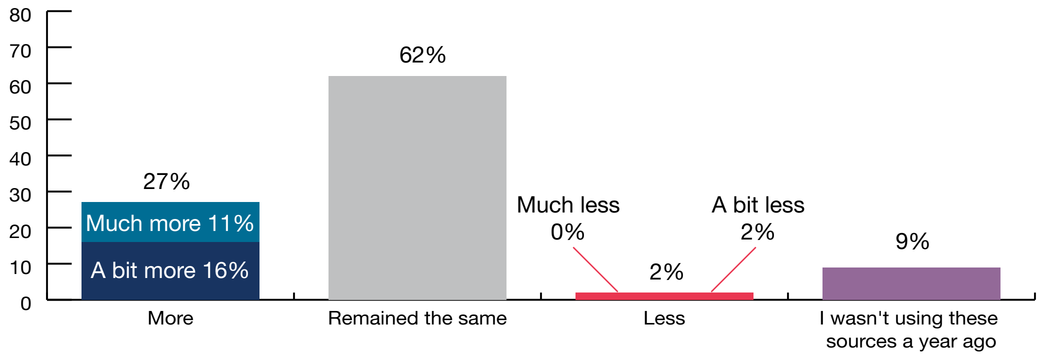
Base: n=414 (downloaded/accessed digital magazines), n=14-163 (those who use each source to download/access digital magazines)

Change in use of illegal sources

In a new question this wave, those who had used an illegal source to download or access digital magazines were asked how the use of these sources compares to the same point a year ago.

- Respondents were most likely to say their usage had remained the same (62%). This was followed by those who were using these sources more (27%) with smaller numbers saying that they weren't using them at all a year ago (9%) or that they were using them less (2%).

G24. You said you download or stream digital magazines using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=99 (downloaded or accessed digital magazines illegally)

Respondents whose usage of illegal sources had changed since the previous year were asked a follow up open text question about the reasons for this change.

Those who were using these sources **more** than they were a year ago highlighted that increased time due to lockdown had led to them to read more magazines. A considerable amount also mentioned how they stopped feeling comfortable reading paper magazines
that might have been handled by many people (e.g. in store) due to coronavirus concerns. The ease of online access and being able to access them for free were also mentioned.

- *"I am not always able to get out to the shops to get my regular magazines."* - Female, 55+
- *"A year ago I didn't bother with digital magazines - but due to "lockdown" and Covid-19 I prefer to have digital rather than hard copies - less chance of infection (by not handling mags that have been leafed through in stores) I doubt I will go back to hard copies."* - Female, 55+
- *"It is easy to use."* - Male, 12-15

Those who were using these sources **less** than they were a year ago highlighted that they simply had less time now to read digital magazines.

The respondents who had **started using** these illegal sources since the same point last year highlighted that they had only recently become aware that magazines could be accessed for free online. A few also mentioned that owing to the imposed lockdown, they had more time to read digital magazines.

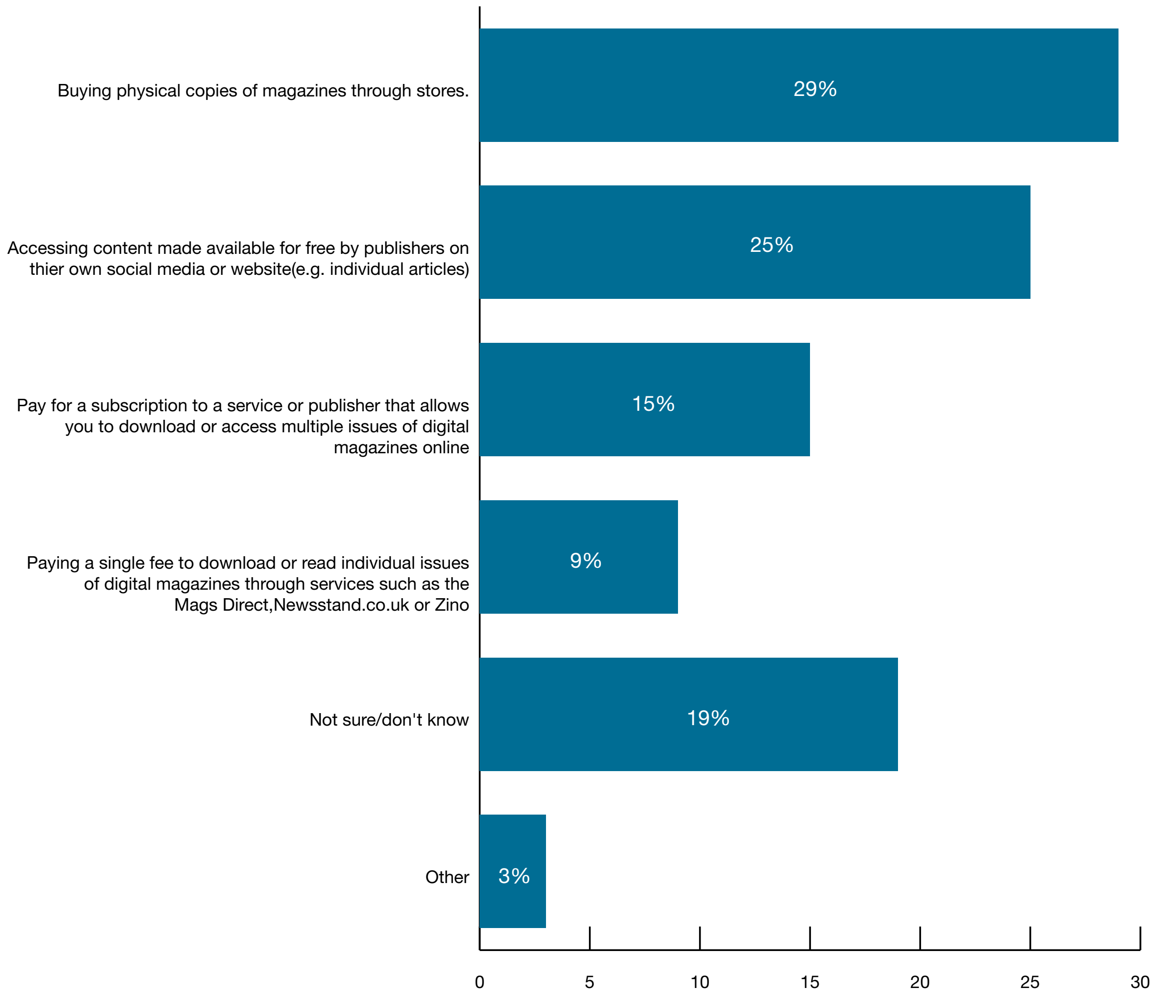
- *"I didn't know these sources were available before."* - Male, 18-24
- *"I just discovered you can download digital magazines for free."* - Female, 35-44
- *"Lockdown has meant I have been bored at home and needed more to read."* - Female, 12-15

Alternatives to infringement

Those who had used illegal sources to access digital magazines were asked which *single* legal source they would use if they could no longer access them illegally.

- Respondents were most likely to indicate that they would “buy physical copies of magazines through stores” (29%) or access “content made available for free by publishers on their own social media or website” (25%).
- Paid options accounted for around half (54%) of responses. They were split between buying “physical copies of books through stores” (29%), “Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online” (15%) and “paying a single fee to download or read individual issues of digital magazines” (9%).

G23. If digital magazines were no longer available to download or access via these sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
Accessing content made available for free by publishers on their own social media or website (e.g. individual articles)	27%	24%	12%	27%	48%	26%	13%	20%
Buy physical copies of magazines through stores	23%	36%	33%	35%	20%	24%	32%	35%
Not sure / don't know	22%	14%	0%	12%	11%	17%	31%	30%
Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online	16%	14%	33%	19%	16%	21%	6%	5%
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	12%	6%	23%	8%	5%	4%	12%	10%
Other	0%	6%	0%	0%	0%	8%	7%	0%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=99 (downloaded or accessed digital magazines illegally)

Qualitative insights

Respondents had a mixed reaction to the prospect of only being able to use industry approved sources in order to access digital magazines. Some **did not think it would change their digital magazine habits** in a significant way as they mostly used legitimate methods anyway. Others remained steadfast in their insistence that they **would not pay for access** to digital magazines, saying they would simply stop reading certain ones if unable to access them via illegal sources. Yet, many also acknowledged that there were many industry approved methods of accessing digital magazines for free which they said they would explore further in this scenario.

- *"I don't want to pay for them, so the only way they can get me in is to provide free copies."* - Female, 45-54
- *"I would not pay for any magazines. Apart from that I would use any method of access if free of charge."* - Male, 25-34
- *"It wouldn't make me feel much different to be honest . . . My content wouldn't change."* - Male, 35-44

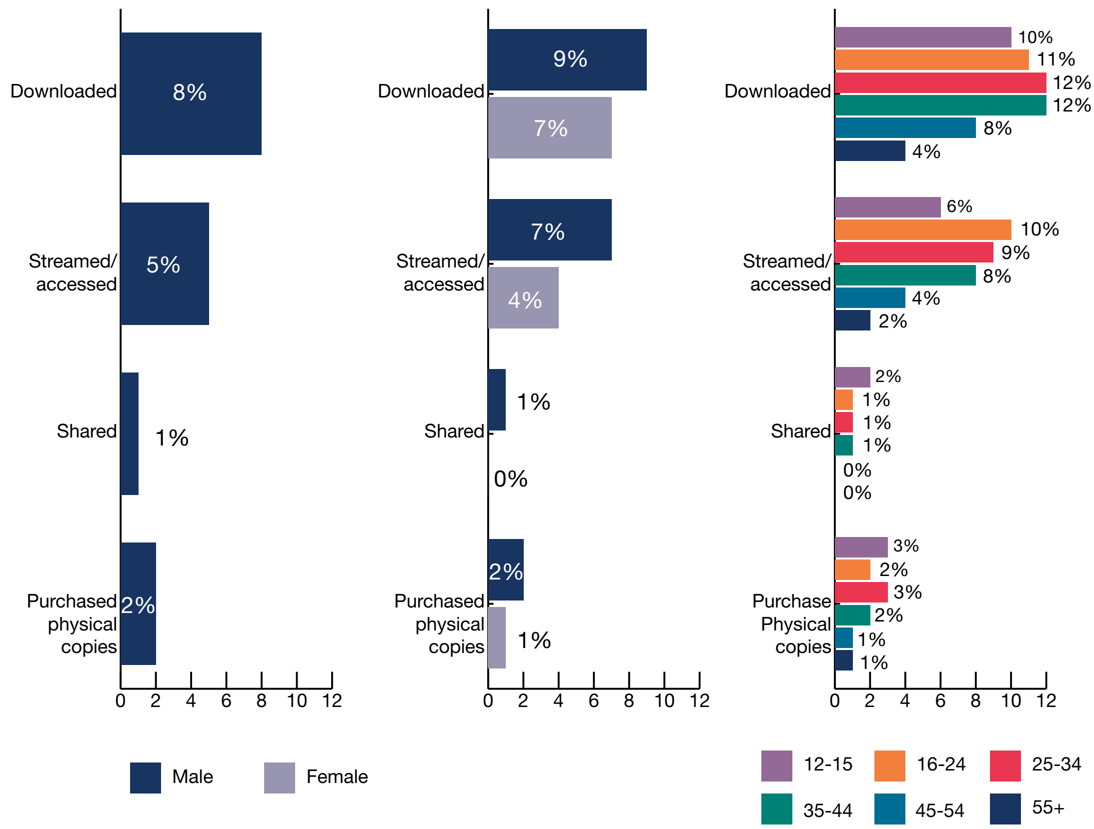
Audiobooks

Engaging with audiobooks

11% had engaged with audiobooks in the previous 3 months (either by downloading, streaming/accessing or sharing audiobooks, or purchasing physical copies).

- The **most common method of access was downloading** (8%).
- This was followed by streaming/accessing online (5%) and then purchasing physical copies (2%).

G23. Have you downloaded/streamed/shared11F10 any audiobooks or purchased physical copies of any publications in the past 3 months?



Base: n=5,004 (total sample)

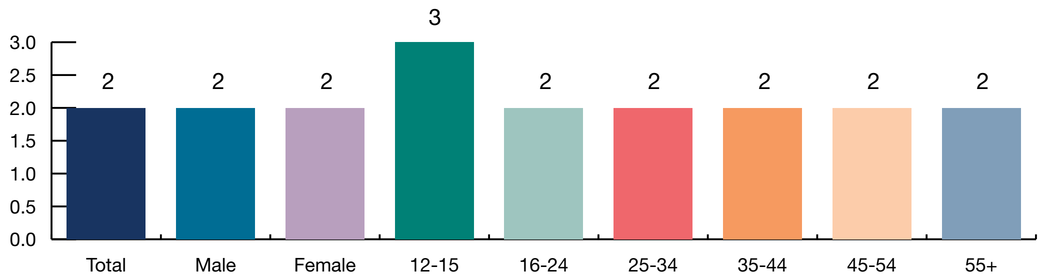
10 The definition of 'shared' was provided as: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in the answer option."*

Physical purchasing of audiobooks

The 2% of respondents who had purchased physical copies of audiobooks during the previous 3 months were asked a question around the number of purchases made.

Respondents had purchased, on average, 2 audiobooks during the previous three months. This was the case for both genders and age groups with the exception of those aged 12-15 who had purchased more (an average of 3).

G24. In the past 3 months, how many audiobooks have you purchased physical copies of? (Average purchases)



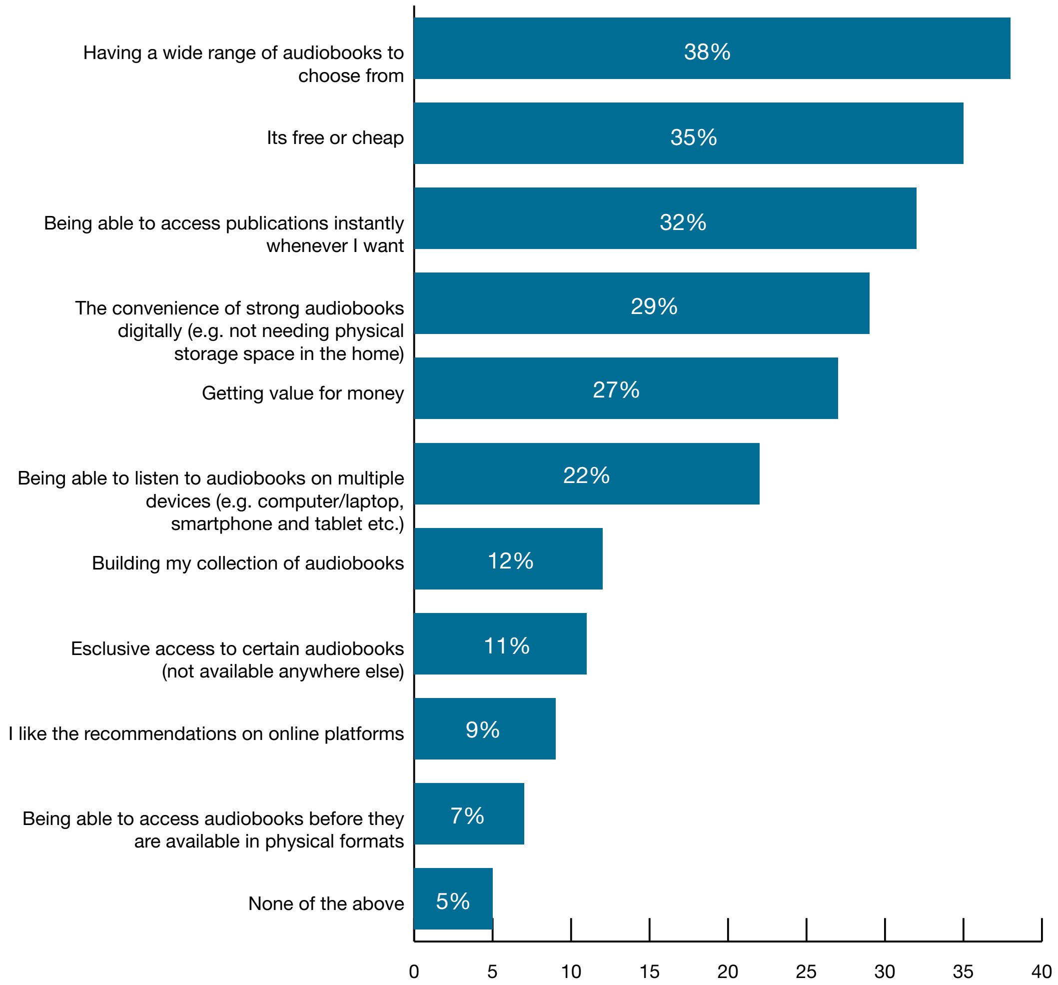
Base: n=79 (purchased physical copies of audiobooks in the past 3 months)

Understanding online consumption of audiobooks

To better understand the drivers of online consumption, those who had downloaded/accessed audiobooks online in the previous 3 months were asked to select their top three reasons for doing so.

- No single factor was selected by more than half of respondents. Three options were selected by approximately a third or more, which included **choice** (“having a wide range of audiobooks to choose from” 38%), **cost** (“it’s free or cheap” 35%) and **access** (“being able to access publications instantly whenever I want” 32%).
- These were followed by the **convenience** of storing content digitally (29%), getting value for money (27%) and being able to listen on multiple devices (22%).

G25. What are the main reasons that you choose to access audiobooks online (i.e. downloading or streaming) Please select your top 3 (%)



Base: n=515 (downloaded or streamed audiobooks in the past 3 months)

Male respondents	Female respondents
1. Having a wide range of audiobooks to choose from (38%) 2. It's free or cheap (36%) 3. Getting value for money (31%)	1. Having a wide range of audiobooks to choose from (38%) 2. Being able to access publications instantly whenever I want (35%) 3. The convenience of storing audiobooks digitally (e.g. not needing physical (33%)

Aged 12-15	Aged 16-24
1. Having a wide range of audiobooks to choose from (35%) 2. It's free or cheap (31%) 3. Being able to read audiobooks on multiple devices (e.g. computer/laptop, smartphone and tablet etc.) (30%)	1. Being able to access publications instantly whenever I want (39%) 2. Having a wide range of audiobooks to choose from (36%) 3. Getting value for money (35%)
Aged 25-34	**Aged 35-44**
1. Being able to access publications instantly whenever I want (39%) 2. Having a wide range of audiobooks to choose from (33%) 3. It's free or cheap (32%)	1. Having a wide range of audiobooks to choose from (38%) 2. Getting value for money (30%) 3. The convenience of storing audiobooks digitally (e.g. not needing physical (30%)
Aged 45-54	**Aged 55+**
1. Having a wide range of audiobooks to choose from (45%) 2. It's free or cheap (45%) 3. Being able to access publications instantly whenever I want (34%)	1. It's free or cheap (44%) 2. Having a wide range of audiobooks to choose from (41%) 3. The convenience of storing audiobooks digitally (e.g. not needing physical (34%)

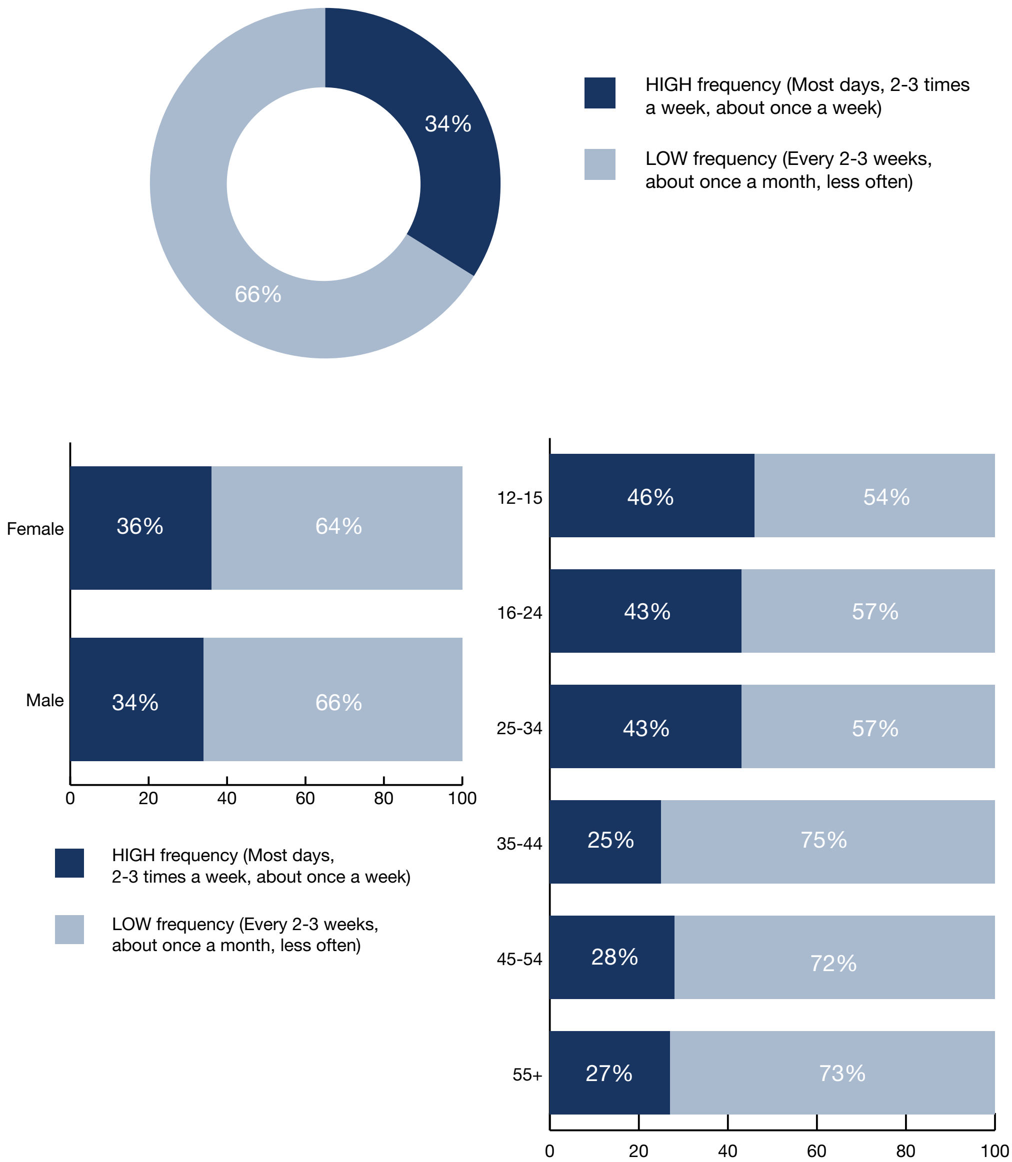
Downloading/accessing audiobooks

The 10% who had downloaded/accessed audiobooks during the previous 3 months were asked more questions around frequency, volume and sources used.

Frequency and volume of downloading audiobooks

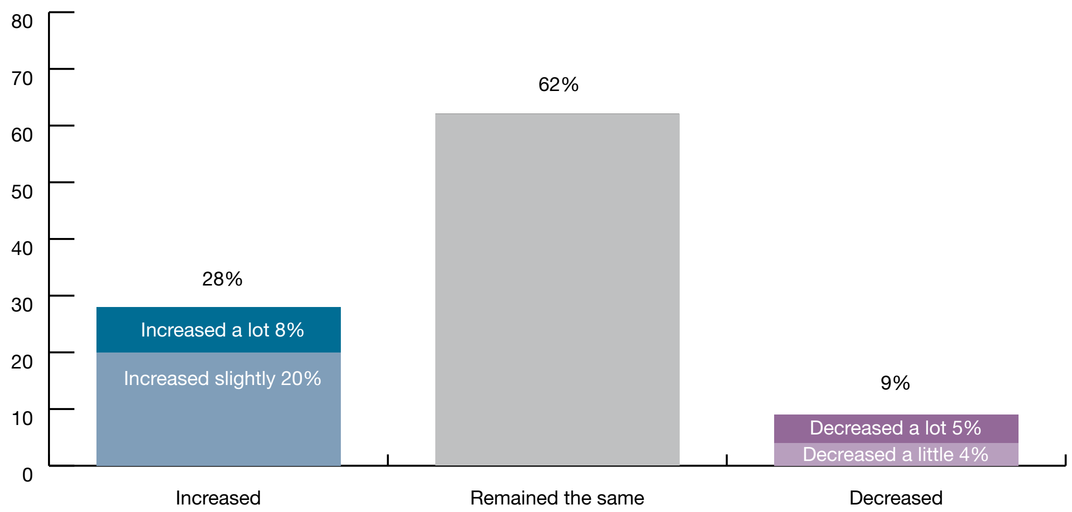
- A third (34%) of those who downloaded/accessed audiobooks did so frequently (i.e. at least once a week).
- The number of audiobooks downloaded/accessed since COVID-19 had increased for 28% of respondents. Approximately six in ten (62%) said the number had remained the same with relatively few saying it had decreased (9%).
    - Before COVID-19, respondents had downloaded/accessed, on average, 9 audiobooks every three months.
    - During the previous three months the amount they had downloaded remained the same at an average of 9 audiobooks.

G26. Generally, how often do you download or access audiobooks through the internet? (%)



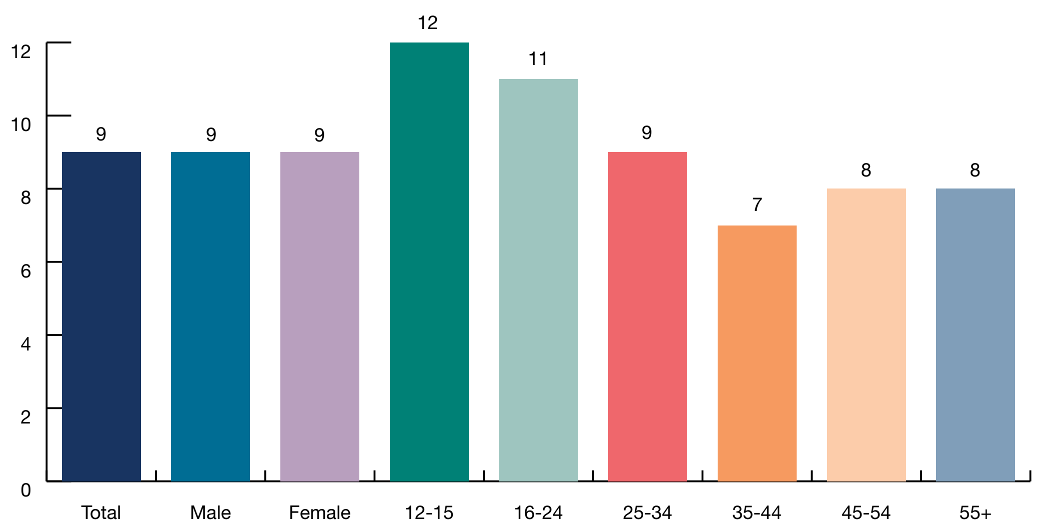
Base: n=515 (downloaded/accessed audiobooks in the past 3 months)

G27. Since the coronavirus (COVID-19) outbreak, would you say the number of audiobooks you have downloaded or accessed has?

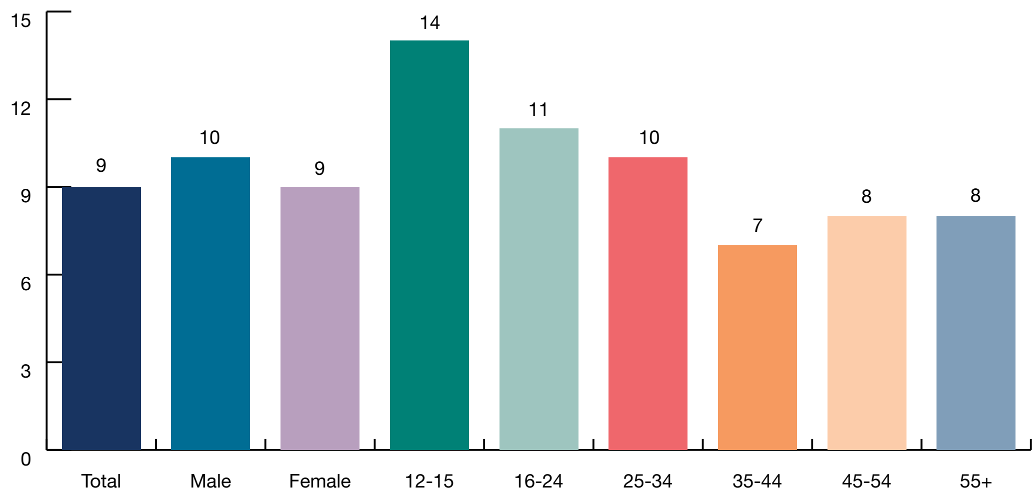


Base: n=515

G28. Before the coronavirus outbreak, how many audiobooks would you say you used to download or accessed in a 3 month time period?



G29. In the past 3 months how many audiobooks did you download or access through the internet?



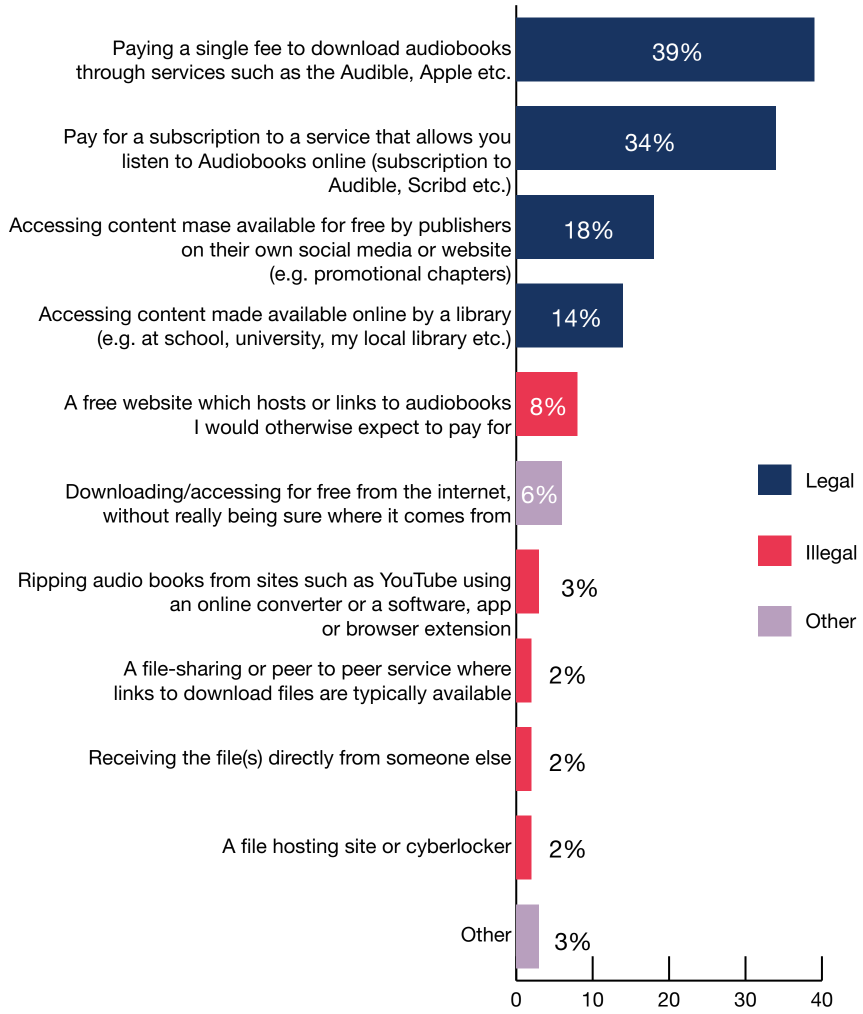
Base: n=511-515 (downloaded or streamed/accessed audiobooks in the past 3 months)

Sources of accessing audiobooks

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could access audiobooks. An ‘unknown’ option was also provided to serve as a catch-all for those who were unsure of the exact source.

- The most commonly used sources were **legal** ones. The top two sources, by a large margin, were “Paying a single fee to download individual audiobooks through services such as the Audible, Apple etc.” (39%) and “‘Pay for a subscription to a service that allows you listen to Audiobooks online” (34%).
- This was followed some way behind by “Accessing content made available for free by publishers on their own social media or website” (18%) and “Accessing content made available online by a library” (14%).
- The most commonly used illegal source was “A free website which hosts or links to audiobooks I would otherwise expect to pay for” (8%). No other illegal source was selected by more than 3%.

G30. Which of the following have you used to download or access audiobooks in the past 3 months? (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
Paying a single fee to download audiobooks through services such as the Audible, Apple etc.	40%	37%	46%	39%	41%	39%	28%	41%
Pay for a subscription to a service that allows you listen to Audiobooks online (subscription to Audible, Scribd etc.)	32%	36%	26%	53%	36%	36%	32%	15%
Accessing content made available for free by publishers on their own social media or website (e.g. promotional chapters)	18%	18%	15%	19%	22%	12%	19%	18%
Accessing content made available online by a library (e.g. at school, university, my local library etc.)	10%	20%	15%	10%	9%	12%	20%	23%
Downloading / accessing for free from the internet, without really being sure where it comes from	8%	4%	11%	4%	6%	7%	8%	4%
A free website which hosts or links to audiobooks I would otherwise expect to pay for	7%	8%	11%	2%	5%	6%	9%	17%
Ripping audio books from sites such as YouTube using an online converter or a software, app or browser extension	3%	3%	9%	2%	3%	3%	4%	1%
A file-sharing or peer to peer service)where links to download files are typically available	2%	1%	2%	2%	2%	2%	3%	0%
A file hosting web site or cyberlocker	2%	1%	7%	2%	1%	2%	0%	0%
Receiving the file(s) directly from someone else	1%	2%	11%	0%	1%	2%	0%	0%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=515 (downloaded or accessed audiobooks during the past 3 months)

Downloading/accessing for free from the internet, without really being sure where it comes from

Those unsure of the source of their audiobooks were asked, *in a new question this wave*, to explain more about how they accessed them in their own words.

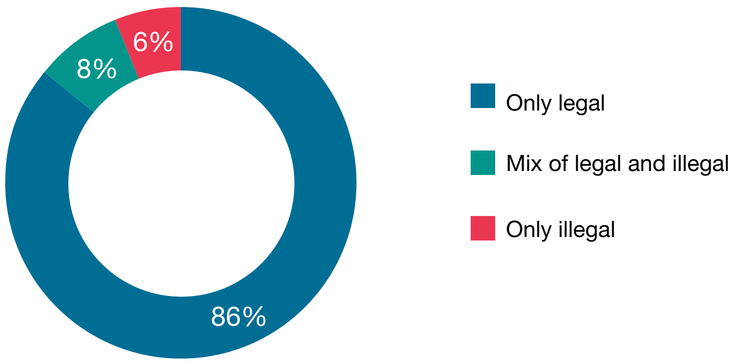
The most common method of accessing an audiobook was through a Google search. Respondents using this method simply clicked on the first result that had their desired audiobook but they weren't sure of the exact source. Audiobook recordings on YouTube was another mode of access.

Legality of audiobooks access

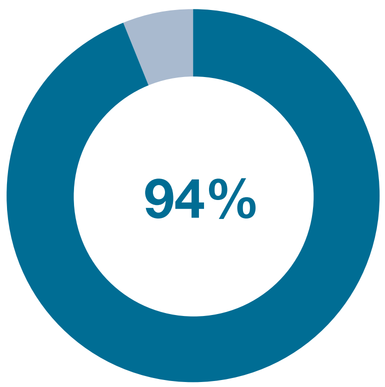
To better understand the distribution of sources across legal and illegal categories, those who had downloaded/accessed audiobooks in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

The answer option “downloading/accessing for free from the internet, without really being sure where it comes from” was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

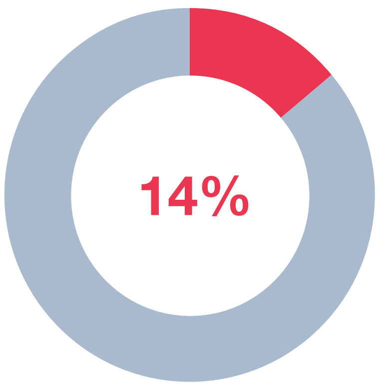
- Legal:
  - Overall 94% had used at least one legal source to access audiobooks.
  - **86%** had used legal sources only.
- Illegal:
  - **14%** had used at least one illegal source to access audiobooks
  - **6%** had used illegal sources only to download audiobooks
- Mixed:
  - **8%** had used a mix of legal and illegal sources.

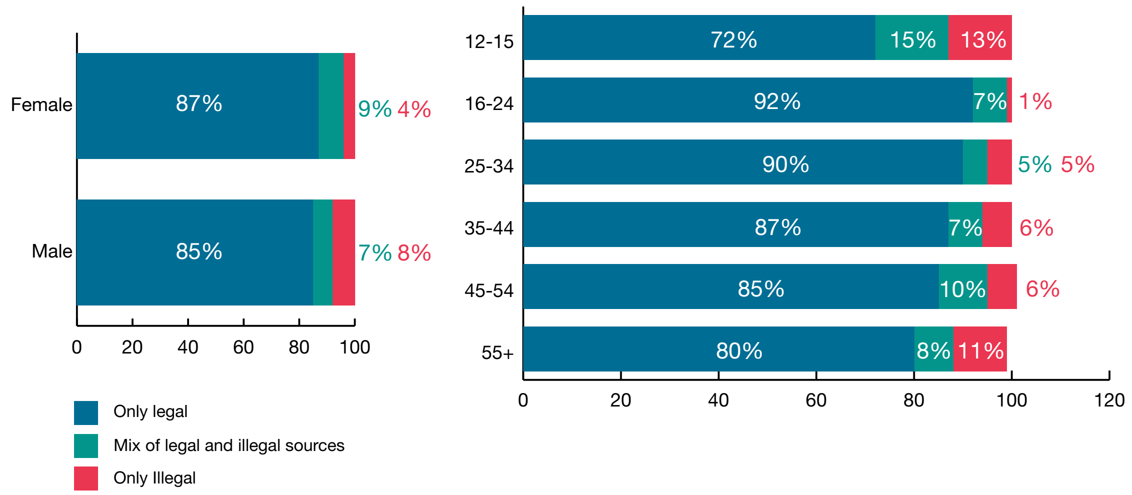


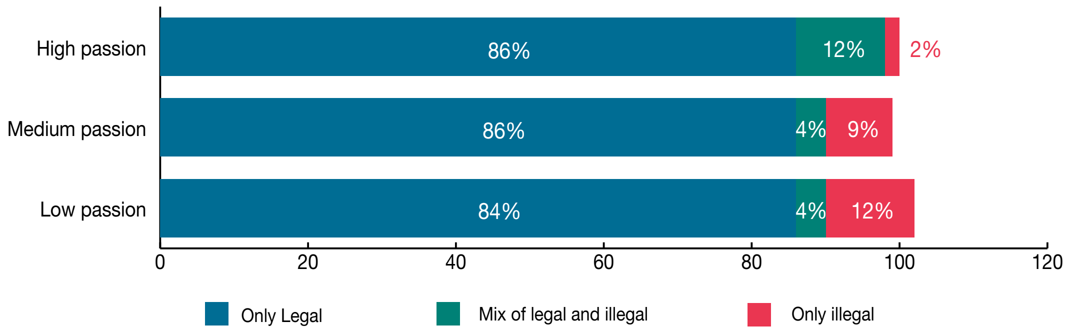
Any legal



Any illegal







Base: n=478 (those who have downloaded or accessed audiobooks in the past 3 months with those who selected 'other' or 'not sure of source' removed).

G31. And how is the way you download or access digital magazines typically split across the following sources?

	Source	Average % of usage split	Average downloads
Legal	Paying a single fee to download audiobooks through services such as the Audible, Apple etc.	33%	2.3
	Pay for a subscription to a service that allows you listen to audiobooks online (subscription to Audible, Scribd etc.)	29%	3.5
	Accessing content made available for free by publishers on their own social media or website (e.g. promotional chapters)	12%	1.2
	Accessing content made available online by a library (e.g. at school, university, my local library etc.)	10%	0.8
Illegal	Ripping audio books from sites such as YouTube using an online converter or a software, app or browser extension	2%	0.3
	A file hosting web site or cyberlocker	1%	0.1
	Bittorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay	1%	0.1
	Receiving the file(s) directly from someone else (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	1%	0.1
	A free website which hosts or links to audiobooks I would otherwise expect to pay for	5%	0.5

	Source	Average % of usage split	Average downloads
Other	Downloading / accessing for free from the internet, without really being sure where it comes from	5%	0.3
	Other	3%	0.1

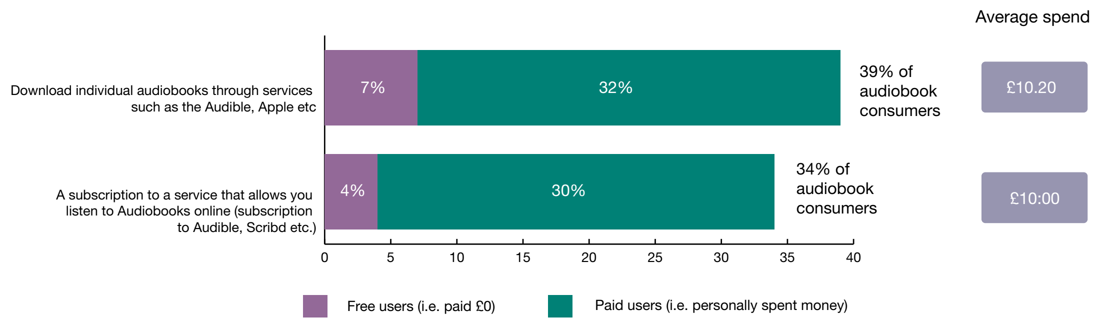
Base: n=511-515 (downloaded/accessed digital magazines in the past 3 months)

Paying for audiobooks

In a new question this wave, those who had used a paid source to either download or access audiobooks were asked how much they had personally spent on each source.

- Two in five (39%) audiobook consumers over the past three months said they downloaded individual audiobooks through services such as Audible, with most making a personal contribution towards a subscription (32%). They spent, on average, £10.20 each month.
- A significant proportion (34%) had a subscription to a service which allows them to listen to audiobooks online. They spent, on average, a similar amount to what was spent on downloading individual audiobooks (£10.00 each month).

G32. Approximately how much do you personally spend each month on the below sources of streaming or downloading audiobooks? Proportion of audiobook consumers over past three months using a paid source and average amount spent each month by users of that source)



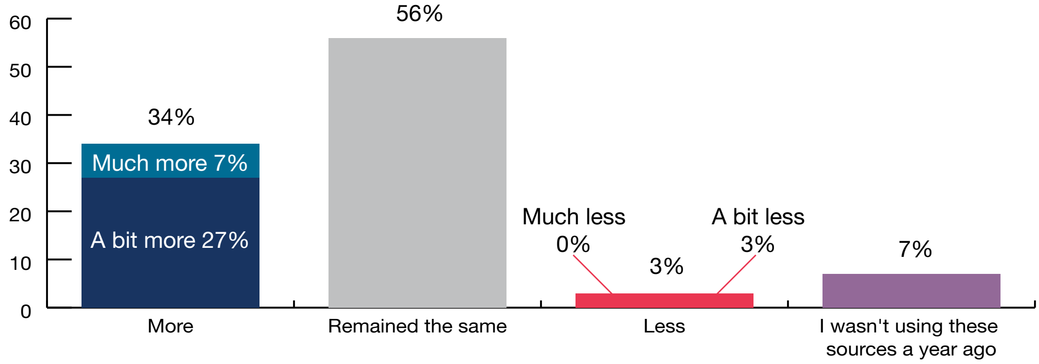
Base: n=515 (downloaded/accessed audiobooks), n=33-325 (those who used each of the sources to download/access audiobooks)

Change in use of illegal sources

In a new question this wave, those who had used an illegal source to download or access audiobooks were asked how the use of these sources compares to the same point a year ago.

- Respondents were most likely to say their usage had remained the same (56%). This was followed by those who were using them more (34%) with relatively small numbers saying their usage was less (3%) or that they weren't using these sources at all a year ago (7%).

G33. You said you download/access audiobooks using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=68 (those who had used an illegal source to download/access audiobooks)

Respondents whose usage of illegal sources had changed since the previous year were asked a follow up open text question about the reasons for this change.

Those who were using these sources **more** than they were a year ago highlighted the ease of accessing in this way and the fact that they now had additional time to do so owing to the lockdown measures. The high volume of audiobooks they listen to made it necessary to look for free versions as otherwise consumption would bec*ome too costly.*

- *"The amount of audiobooks I listen to, it would be very expensive. Also, I feel like you can share physical copies of books, so you should be able to share digital copies of audiobooks with friends and family as well."* - Female, 25-34

- *"[Illegal audiobooks are] easy to use."* - Male, 12-15

- *"[Illegal audiobooks] are easier to access."* - Male, 55+

Those who were using these sources **less** than they were a year ago were very few. There were only two responses to this question, both highlighting that it was due to a lack of time.

The respondents who had **started using** these illegal sources since the same point last year highlighted having more time on their hands to look for more content and that friends or family members had recommended accessing them this way.

- *"Got a recommendation to try it out."* - Male, 12-15

- *"I just thought I'd give it a try."* - Male, 55+

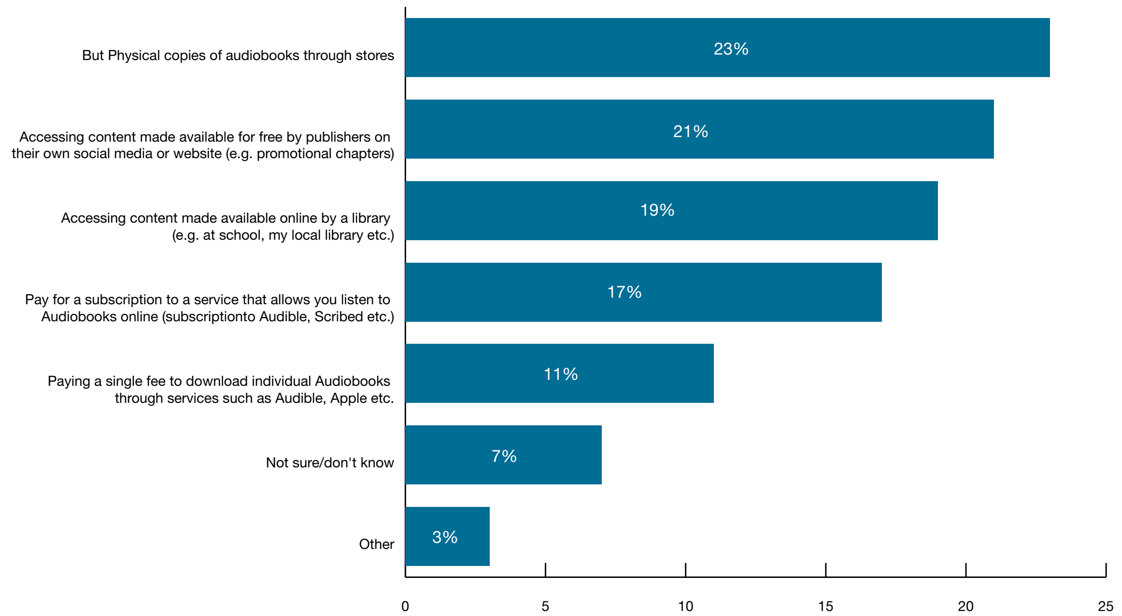
- *"Change of working pattern and more available time."* - Female, 25-34

Alternatives to infringement

Those who had used illegal sources to access audiobooks were asked which **single** legal source they would use if they could no longer access them illegally.

- Respondents were most likely to indicate that they would "buy physical copies of audiobooks through stores" (23%).
- The second and third top responses related to free sources - "made available for free by publishers on their own social media or website" (21%) and "accessing content made available online by a library" (19%).
- The remaining "paid for" options were "pay for a subscription to a service that allows you listen to Audiobooks online" (17%) and "paying a single fee to download individual audiobooks through services such as the Audible, Apple etc." (11%). Encouragingly, overall, paid options accounted for half (50%) of responses.

G34. If audiobooks were no longer available to download or access via these sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)



	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
Accessing content made available for free by publishers on their own social media or website (e.g. promotional chapters)	26%	14%	27%	21%	17%	21%	9%	27%
Accessing content made available online by a library (e.g. at school, my local library etc.)	18%	20%	8%	36%	8%	29%	36%	7%
Pay for a subscription to a service that allows you listen to Audiobooks online (subscription to Audible, Scribd etc.)	17%	16%	19%	43%	24%	7%	9%	13%
Buy physical copies of audiobooks through stores	15%	33%	28%	0%	35%	20%	18%	23%
Paying a single fee to download individual audiobooks through services such as the Audible, Apple etc.	11%	10%	0%	0%	8%	22%	18%	9%
Other	2%	3%	0%	0%	0%	0%	0%	13%

Number is significantly higher or lower than the other ages or genders in the same row.

Base: n=68 (downloaded or accessed audiobooks illegally)

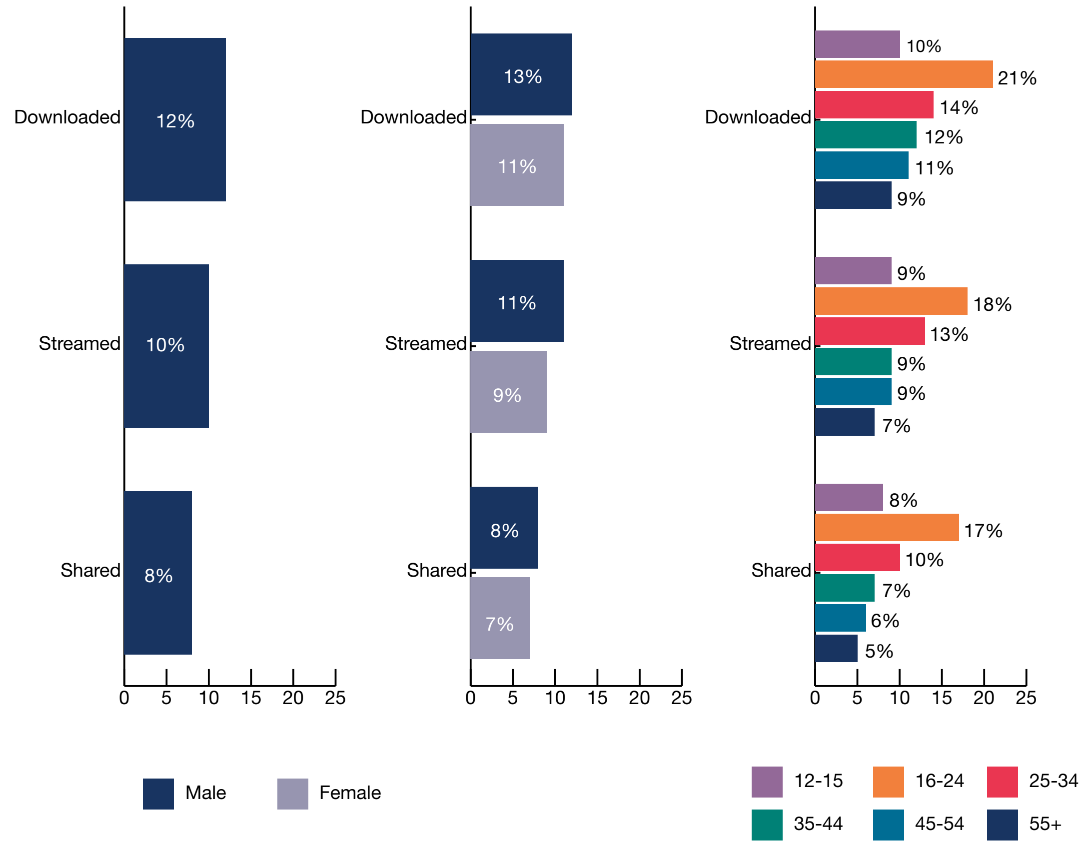
Digital visual images

Engaging with digital visual images

18% had engaged with digital visual images in the previous 3 months (i.e. either by downloading, streaming or sharing).

- Downloading digital visual images was slightly more common (12%) than streaming/accessing online (10%), with 8% having shared them with others.
- Across all methods, those aged **16-24** were notably more engaged than both older and younger groups.

H1. Have you downloaded/streamed/shared[11] copies of digital visual images in the past 3 months?



Base: 2020 n=5,004 (total sample)

11 The definition of 'shared' was provided as: *"By shared we mean that you personally made the file publicly available, or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in the answer option."*

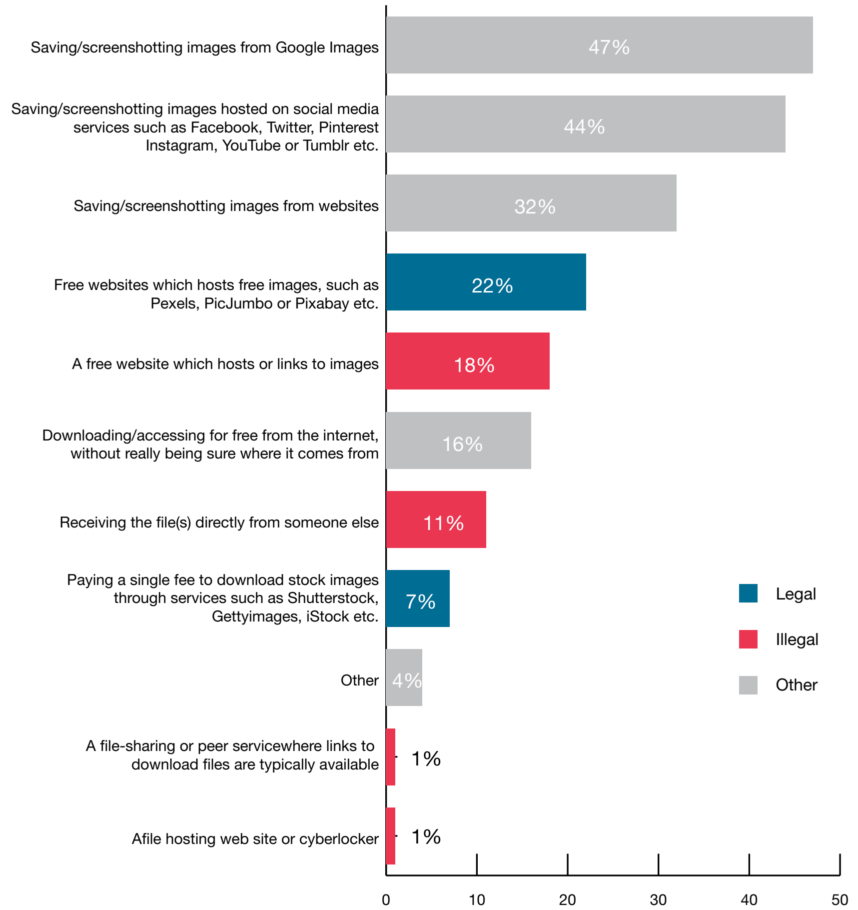
Sources of digital visual images

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could access digital visual images. An 'unknown' option to serve as a catch-all for those who were unsure of the exact source.

It was made clear in the survey that we were asking about images that do not belong to the respondent (i.e. stock images you may pay to download, images found through searching on Google, images on social media services and images hosted on forums, file-hosting websites or through file-sharing services). In this wave, we have included a follow up question on how they go on to use the images (e.g. sharing on social media, including within presentations etc.)

- The most common behaviour, overall, was taking **screenshots** of digital visual images hosted online. More specifically, half (47%) did so from Google Images, 44% from social media and 32% from other websites.
- Those who accessed through **legal** means were more likely to use "Free websites which host royalty-free images" (22%), with a smaller proportion (7%) paying a single fee to download via services such as Shutterstock.
- The most commonly selected **illegal** methods were using "A free website which hosts or links to images" (18%) and "Receiving the file(s) directly from someone else" (11%). Other than this, no illegal source was selected by more than 1%.

H2. And how is the way you download/access Digital Visual Images typically split across the following sources?



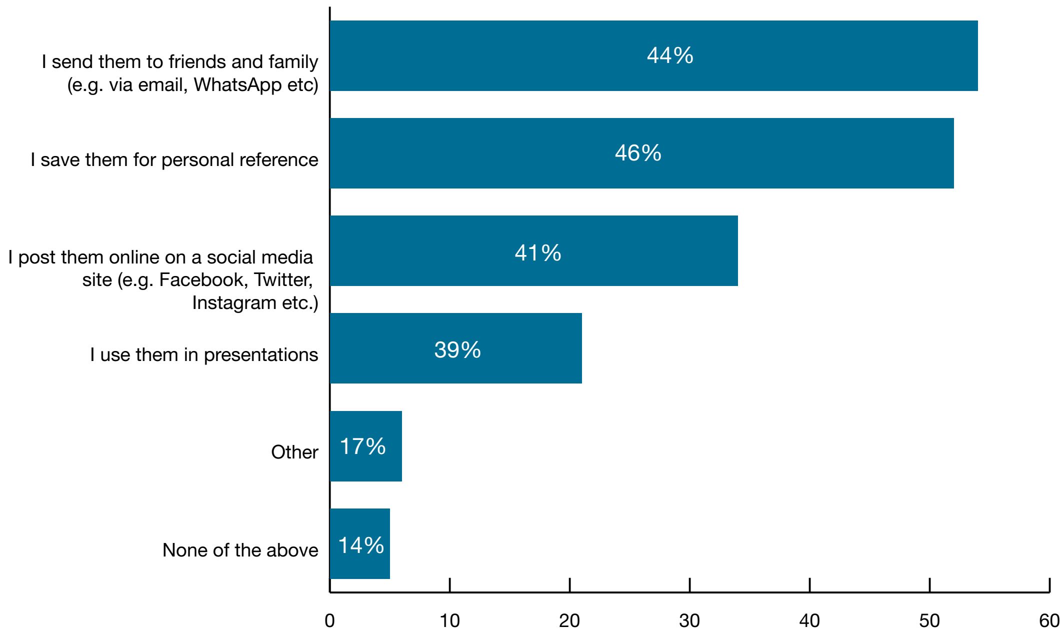
Base: n=829 (downloaded/streamed digital visual images in the past 3 months)

Use of digital visual images

H3. What do you tend to do with the images that you download/access? Please select all that apply

In a new question this wave, respondents who had downloaded or accessed a digital visual image were asked what they had used it for.

- Respondents were most likely to either **share them with a limited group of people** ("I send them to friends and family" 54%) or **keep them for personal use** ("I save them for personal reference" 52%).
- This was followed by approximately a third who said they post them on a **social media sites** (34%), and around a fifth using them in **presentations** (21%).



Base: n=829 (downloaded/streamed digital visual images in the past 3 months)

Behaviour Change Opportunities –

Key drivers of infringement

The qualitative phase of research, in the form of an Online Community, gave further insight into the particular motivations and attitudes attached to accessing content online, via both legal and illegal means. It sought, in particular, to assess the impact the recent months of unusual circumstances due to the coronavirus (COVID-19) pandemic may have had on such attitudes and behaviours.

As established in the previous (2019) wave of research, this year's study reinforced that the key factors driving infringement across all entertainment categories are;

- Cost and wanting to limit spending -particularly within categories where content is split across many different providers with separate subscriptions to pay for each.
- The availability and broad range of content accessible via illegal sources which often offer people more options than legal methods.
- The ease of access of illegal methods meaning that there are relatively few barriers to use.

Despite the extraordinary backdrop to this year's research, carried out during a government imposed lockdown due to the COVID-19 pandemic, these key drivers of infringement remained the same.

Encouragingly, despite some respondents in the Online Community voicing concerns about finances and budgeting during the lockdown period, none mentioned cancelling any of their online entertainment subscriptions or being more concerned about the cost of entertainment now than before the lockdown. Therefore, cost remained a key factor in accessing illegal sources of entertainment but did not appear to play a significantly more important role than before the impact of COVID-19 for most.

Communications Testing

Respondents were shown a range of messaging focussed on showing the consequences of online piracy and infringement.

The types of messages shown fell into the following categories:

- Messages describing the impact of infringement on the general economy
- Messages describing the impact of infringement on entertainment industries
- Messages describing the financial burden placed on these industries during lockdown

Key Findings

What became overwhelmingly apparent through feedback from respondents was that, no matter which category the messages fell into, focussing on the story of an individual was the most effective way of encouraging acts of self-reflection and potential behaviour change.

Messages about the consequences to industries, big corporations or the economy failed to garner much empathy across the board whilst messages relating to COVID-19 were seen as potentially insensitive and only temporary in effect, given that lockdown would eventually end thus making them difficult to relate to.

Communications Testing

Effective messaging for difference consumer types

As established last year, users of illegal sources mostly fell into two segments:

- Cautious Infringers: Those who worry about infringing the law and the risks of illegal activity.
- Savvy Infringers: Those who are more tech savvy and knowingly access content illegally without much concern over related dangers or consequences.

The Communications Testing phase again revealed the contrasting needs and attitudes of both segments:

Considerations for Cautious Infringers:

- More likely to have a positive reaction to a broad range of messages.
- Consider these messages informative and ‘eye opening’, leading to a potential change in attitudes and resulting behaviours.
- Particularly affected by stories of loss to individuals; artists, creatives or employees.

Considerations for Savvy Infringers:

- Sceptical about the true impact of illegal access on industries or of the opinion that industries must change, not consumers.
- Of the messages tested, those about potential harm to an individual in the industry had the most impact on this group.
- Messages about risk to the consumer through digital viruses etc. should also be considered for this group.

There is potential to explore messages around risk of greater legal action and consequences for those who infringe - this is not currently seen as a viable threat but was mentioned by a few as a potential deterrent if enforced more widely.

Intellectual Property Office

Qualitative Summary

Key drivers of infringement

The qualitative phase of research, in the form of an Online Community, gave further insight into the particular **motivations and attitudes** attached to accessing content online, via both legal and illegal means. It sought, in particular, to assess the **impact** the recent months of **unusual circumstances** due to the coronavirus (COVID-19) pandemic may have had on such attitudes and behaviours.

As established in the previous (2019) wave of research, this year's study reinforced that the key factors driving infringement across all entertainment categories are;

- Cost and wanting to limit spending - particularly within categories where content is split across many different providers with separate subscriptioins to pay for cash

  Cost and wanting to limit spending - particularly within categories where content is split across many different providers with separate subscriptions to pay for each.

- The availability and broad range of content accessible via illegal sources which often offer people more options than legal methods.

  The ease of access of illegal methods meaning that there are relatively few barriers to use.

Despite the extraordinary backdrop to this year's research, carried out during a government imposed lockdown due to the COVID-19 pandemic, these **key drivers of infringement remained the same.**

Encouragingly, despite some respondents in the Online Community voicing concerns about **finances and budgeting** during the lockdown period, none mentioned cancelling any of their online entertainment subscriptions or being more concerned about the cost of entertainment now than before the lockdown. Therefore, **cost remained a key factor** in accessing illegal sources of entertainment but **did not appear to play a significantly more important role** than before the impact of COVID-19 for most.

Similarly, while consumption via illegal sources appears to have increased during lockdown, respondents reported an increase in their consumption across **all of the sources** they use, both legal and illegal. Therefore the increase in use of illegal sources appears to be in proportion to the general increase in consumption of entertainment.

Communications Testing

Respondents were shown a range of messaging focussed on **showing the consequences of online piracy and infringement.**

The types of messages shown fell into the following categories:

Messages describing the impact of infringement on the **general economy**

Messages describing the impact of infringement on **entertainment industries**

Messages describing the financial burden placed on these industries **during lockdown**

Key Findings

What became overwhelmingly apparent through feedback from respondents was that, no matter which category the messages fell into, focussing on the **story of an individual** was the most effective way of encouraging acts of **self-reflection and potential behaviour change.**

Messages about the consequences to industries, big corporations or the economy **failed to garner much empathy** across the board whilst messages relating to COVID-19 were seen as **potentially insensitive and only temporary** in effect, given that lockdown would eventually end thus making them difficult to relate to.

Effective Messaging for Different Consumer Types

As established last year, users of illegal sources mostly fell into two segments:

Cautious Infringers: Those who worry about infringing the law and the risks of illegal activity.

Savvy Infringers: Those who are more tech savvy and knowingly access content illegally without much concern over related dangers or consequences.

The Communications Testing phase again revealed the **contrasting needs and attitudes** of both segments:

Considerations for Cautious Infringers:

More likely to have a **positive reaction to a broad range** of messages.

Consider these messages **informative** and 'eye opening', leading to a potential change in attitudes and resulting behaviours.

Particularly affected by stories of **loss to individuals**; artists, creatives or employees.

Considerations for Savvy Infringers:

Sceptical about the true impact of illegal access on industries or of the opinion that **industries must change,** not consumers.

Of the messages tested, those about potential harm to an individual in the industry had the **most impact on this group.**

Messages about **risk to the consumer** through digital viruses etc. should also be considered for this group.

There is potential to explore messages around risk of **greater legal action and consequences** for those who infringe - this is not currently seen as a viable threat but was mentioned by a few as a potential deterrent if enforced more widely.

Technical appendix

Data collection methodology

Data was collected through an online survey with a representative sample of the UK 12+ population. This represents a departure from previous waves (i.e. prior to wave 9) where a mix of online and face-to-face interviews were used. There are a number of benefits to this approach:

- Given that the study is looking at **online infringement**, a concentration solely on those who have online access is wholly appropriate and allows for a more granular sub-group analysis and a more robust segmentation.
- It is possible, through our network of accredited online sample providers, to reach a **representative population of the target audience** (including the younger and older categories), therefore removing the need to supplement via offline means.
- Online data collection allows us to achieve significant **cost efficiencies**.
- The overall cost reduction provided some budget to make **improvements to the methodology**. More specifically, a qualitative element was included within the 2019 and 2020 OCI studies.

However, it is important to highlight that there are also limitations:

- It is possible that those with **lower levels of online engagement** are less likely to be included in the research, compared to approaches which use offline methods to specifically target them (e.g. CATI, CAPI).
- While broad trends are similar, care should be taken when making specific **comparisons** between the methodologies used in 2019 and 2020 and previous waves, given the changes.

Fieldwork

The survey sample was sourced through AudienceNet's network of professionally managed, ESOMAR compliant, online UK consumer research panels. The sample was selected from panel companies using demographic information they already held (e.g. age, region and gender). Those aged 12-15 were not recruited directly but through the parents of those on the panel. Once parental consent was obtained, the survey was passed on to their children to complete.

In order to recruit for the Online Community, at the end of the survey, respondents were asked for their permission to be recontacted to take part in follow up research. While the opting-in element makes the sample for the Online Community self-selecting in some ways, we had a large pool (n=2,752) to select from. Further quality checks were also introduced to minimise bias:

- At the point of recruitment, those shortlisted were sent a follow-up survey to verify responses to key questions (i.e. around illegal activity).
- All were assured of the confidentiality of their responses in the Community, and that action would not be taken against them.

An incentive was paid to each respondent who took part in the survey and a further one was paid to those who took part in the Online Community.

The questionnaire

The questionnaire used in this wave was in line with that used in 2019 which itself was a departure in some respects from previous waves (see the 2019 ‘Technical appendix’ for more details). There were limited changes to this year’s questionnaire which have been outlined below:

- **New questions to take account of changes in consumption brought on by the COVID-19 pandemic**. This included asking if consumption had changed, for different types of consumption in each category (e.g. downloading, streaming etc), compared to before COVID-19 and, if it had, what their consumption was like then.
- **Addition of questions asking how much is spent on paid content.** This was asked in each category and, where downloading and streaming were asked about separately (e.g. music, film and TV), it was only asked about for a combined list of paid sources.
- **New product categories were included**. E-publishing was split out into e-books (last included as a category in 2018), digital magazines and audiobooks.

Once the survey instrument had been developed, it was **rigorously tested** to ensure that it yielded both reliable and valid data outputs. This consisted of data verification checks and testing, as well as a pilot with a small sample of n=500. No changes were made following the pilot study so these respondents were retained in the final sample.

Achieved sample

Our sample included 5,004 respondents.

	Weighted	Unweighted
Male	49%	49%
Female	51%	51%
Other	0%	0%
12-15	7%	8%
16-24	10%	10%
25-34	16%	16%
35-44	15%	15%
45-54	16%	16%
55+	35%	34%
North East	4%	4%
North West	11%	11%
Yorkshire and The Humber	8%	9%
East Midlands	7%	8%
West Midlands	9%	9%
East	9%	9%
London	13%	13%
South East	14%	14%
South West	9%	9%
Wales	5%	5%
Scotland	8%	8%
Northern Ireland	3%	2%

	Weighted	Unweighted
White	91%	91%
Asian	5%	5%
Black	2%	2%
Other	0%	0%
Mixed/Multiple	1%	1%
Prefer not to say	0%	0%
Yes, I am a parent	28%	28%
Yes, I am a guardian	1%	1%
No	72%	71%

Weighting

Our sample was weighted by gender, age and region to ensure it was representative of the UK 12+ population and avoided any imbalances. It had a weighting efficiency of 99%.

Examples

In each category, examples were given along with ways that each category could be downloaded, streamed or accessed. These included the below:

Category	Source	Examples
Music (downloading)	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	A file hosting website or cyberlocker	MediaFire, Rapidgator etc.
	Downloading from sites such as YouTube using an online file converter or a software, app or browser extension	Y2mate, Flvto.biz
Music (streaming)	A file hosting website or cyberlocker	MediaFire, Rapidgator etc.

Category	Source	Examples
Film (downloading)	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	A file hosting website or cyberlocker	Openload, Zippyshare, MediaFire, Rapidgator etc.
	Downloading feature films from sites such as YouTube using an online converter or a software, app or browser extension	Y2mate, Flvto.biz
Film (streaming)	A file hosting website or cyberlocker	MediaFire, Rapidgator etc.
	A free website which hosts or links to full-length films	WatchFree, Movie4k etc.
	A paid subscription to an IPTV provider that gives you access to content from apps/services without you needing to sign-up for a separate (paid) subscription	Insight IPTV, Gears TV etc.

Category	Source	Examples
TV (downloading)	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	A file hosting website or cyberlocker	MediaFire, Rapidgator etc.
	Software, app, browser extension or online converter that allows you to download music (usually as an MP3) from online streaming websites such as YouTube, SoundCloud or Spotify	Y2mate, Flvto.biz, etc.
TV (streaming)	A file hosting website or cyberlocker	Openload, Zippyshare, MediaFire, Rapidgator etc.
	A free website which hosts or links to full-length films	WatchFree, Movie4k etc.
	A paid subscription to an IPTV provider that gives you access to content from apps/ services without you needing to sign-up for a separate (paid) subscription	Insight IPTV, Gears TV etc.

Category	Source	Examples
Live Sports	A file hosting website or cyberlocker	MediaFire, Rapidgator etc.
	A free website which hosts or links to live sports streams	Wiziwig, First Row Sports, Ronaldo7 etc.
	A paid subscription to an IPTV provider that gives you access to content from apps/ services without you needing to sign-up for a separate (paid) subscription	Insight IPTV, Gears TV etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.

Category	Source	Examples
Video Games	A file hosting website or cyberlocker	Zippyshare, Rapidgator, Nitroflare etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	Downloading modded versions of mobile games for free	APKDrone, APKAward

Category	Source	Examples
Software	A file hosting website or cyberlocker	Zippyshare, Rapidgator etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.

Category	Source	Examples
E-books	A file hosting website or cyberlocker	Zippyshare, Rapidgator, Mega etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	A free website which hosts links to e-books	Ebooks.bike, englishtips.org

Category	Source	Examples
Digital Magazines	A file hosting website or cyberlocker	Zippyshare, Rapidgator, Mega etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.

Category	Source	Examples
Audiobooks	A file hosting website or cyberlocker	Zippyshare, Rapidgator, Mega etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	Ripping audio books from sites such as YouTube using an online converter or a software, app or browser extension	Y2mate, Flvto.biz

Category	Source	Examples
Digital Visual Images	A file hosting website or cyberlocker	Zippyshare, Rapidgator etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	Free websites which hosts free to use images	Pexels, PicJumbo or Pixabay etc.

About AudienceNet

Founded in 2011, AudienceNet's reputation for innovative, "real-time" research grew steadily from its start-point in the music, entertainment and technology industries, through a wide range of both public and private sector organisations, governments, NGOs and philanthropic organisations. With offices in London, Washington D.C. and Melbourne, AudienceNet conducts research, around the clock, in more than 50 countries, spanning across six continents.

Central to our approach is using connected technologies to ensure that research provides the most value for our clients. We place great emphasis on designing research that is truly representative, triangulated (bringing together qualitative and quantitative insights), and time and cost-effective.

With our work regularly informing high-level decision-making and in the public eye, we take the utmost care in ensuring its validity and reliability. Recent projects have been presented at: The World Economic Forum (Davos); The European Parliament; The United Nations; The US House of Representatives and The US Senate. During the Obama Administration, we presented at the White House in the capacity of research partner to the Office for Science & Technology Policy.

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