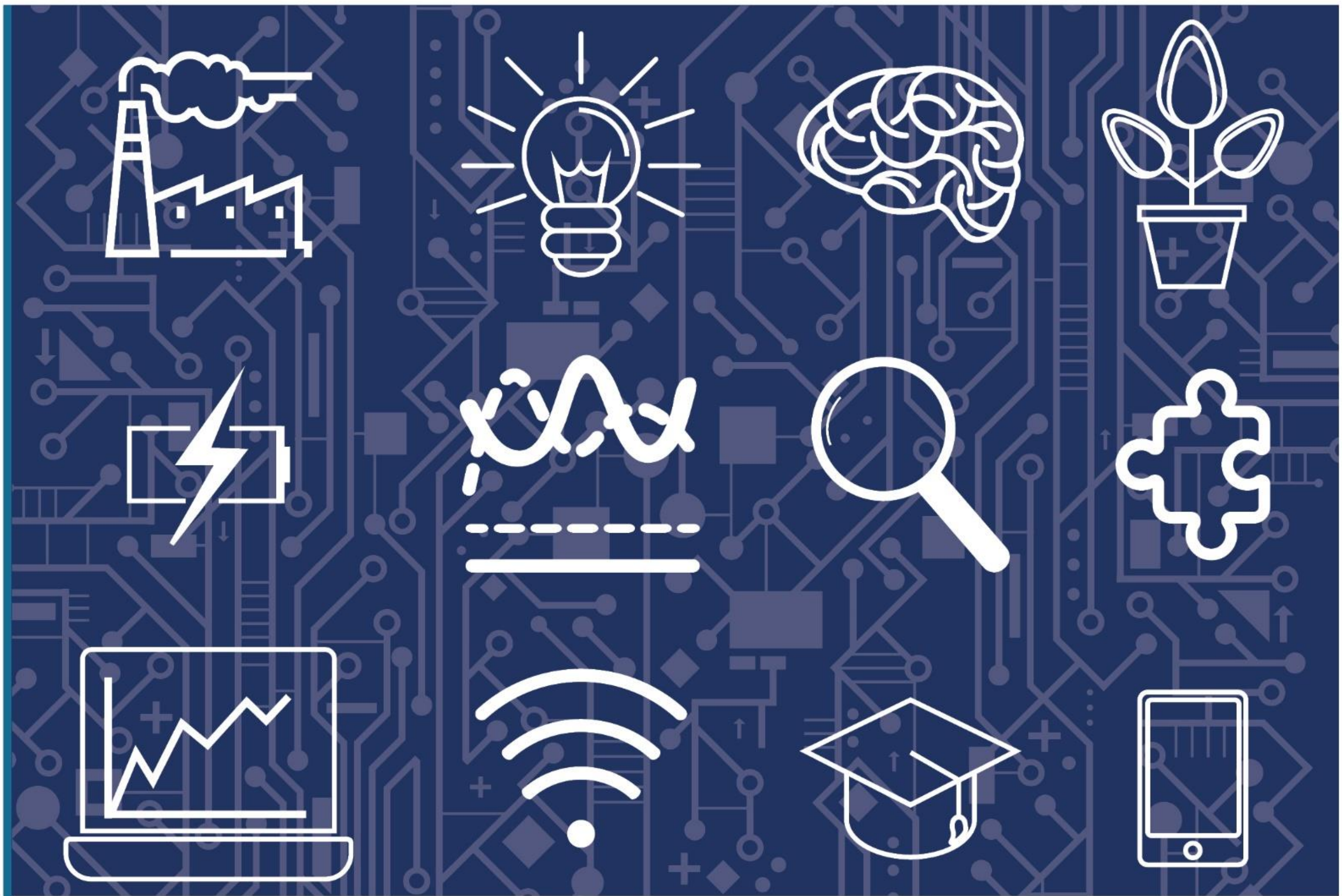
Intellectual Property Office

Online Copyright Infringement Tracker

Latest wave of research (March 2019)
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

OVERALL SUMMARY

For all categories, consumption (i.e. downloading or streaming/accessing content online) **remained consistent or increased** since the previous wave.

Passion for content categories was generally high, especially those that were integral to day-to-day lives or had an important social element.

The main drivers of online consumption were **convenience, access to a wide range of content and cost-effectiveness.**

The overall level of infringement across all content categories (excluding digital visual images) remained consistent across 2018 and 2019.

A quarter

25% had used an illegal source in the last 3 months

Above average infringement levels were seen for e-publications and live sports

- 35% **E-publications**
- 34% **Live sports**

Film, music, software and TV were close to, or just below, average infringement levels

- 27% **Film**
- 20% **Music**
- 18% **Software**
- 17% **TV**

Infringement for video games was notably lower than the other categories

- 6% **Video games**

A key enabler in relation to infringement is the perceived **accessibility**. The process of accessing content via illegal sources is considered to be relatively easy, and the wealth of content available is enticing. There is also a broader sense of **ambiguity around regulation**. For some content categories, there was uncertainty around whether they were technically illegal or not. Furthermore, many felt that the responsibility ultimately lies with those who are making content available. Few also seem to have a sense of the ramifications of using illegal sources and are, therefore, willing to take the risk.

The likelihood and perceived need to infringe was notably lower for categories in which substantial amounts of content are available via **streaming subscription services**. This was particularly apparent for music, film and TV. These services match up well with consumers' motivations for accessing content online. While some would occasionally use illegal means (e.g. when content is unavailable via one platform), frequency of engagement in such activity generally seems to be low.

For categories in which content is **less readily available** for free, or cost-effectively, via a few main legal sources, using illegal sources generally becomes a more attractive option for infringers. However, some do worry about the quality of content and potentially getting viruses, even if they are seen as (relatively) easy to access.

Encouragingly, the **communications testing** in the qualitative phase of the research highlighted a number of messages that could encourage infringers to reduce their use of illegal sources. While there were some differences, depending on whether they were a "savvy" or "cautious" infringer, generally, most reacted well to messages that provided relevant insight into the dangers and consequences of using illegal methods.

Music

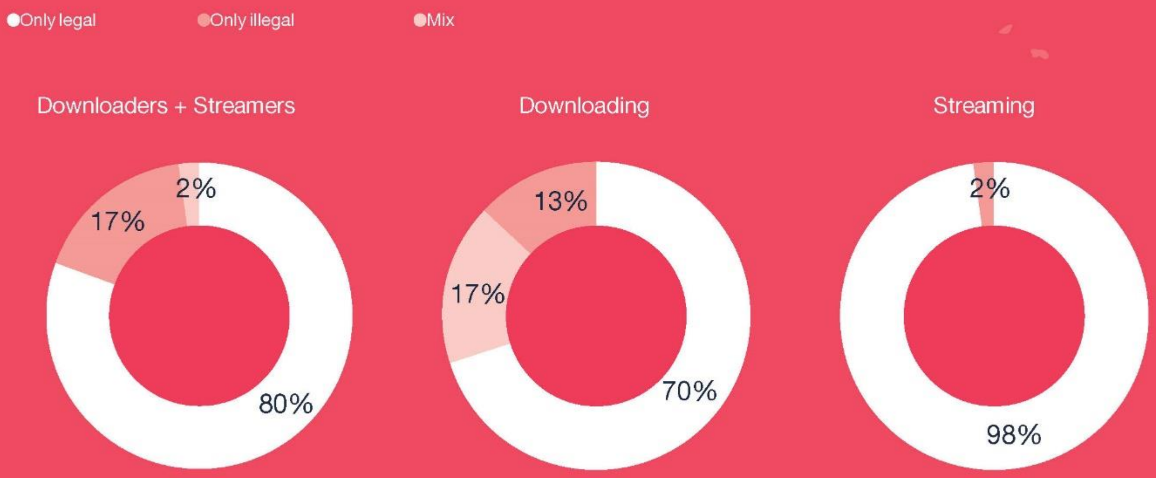
ACCESSING MUSIC

Streaming was the most common method of accessing music, with 40% having done so over the previous 3 months. Downloading followed at 31%, with notably fewer having purchased physical music (20%).

40%	31%	20%
Streamed	Downloaded	Physical purchases

INFRINGEMENT

The overall level of infringement (i.e. anyone who had used an illegal source for music in the past 3 months) **remained stable** between **2018 (19%) and 2019 (20%),** with data from this wave showing that:



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Film

ACCESSING FILM

Streaming was, by some way, the most common method of accessing films, with 34% having done so over the previous 3 months. It was followed by those who had **downloaded films or purchased physical copies** (both 18%).

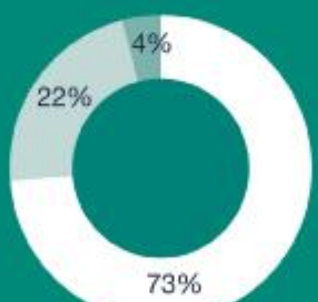
34%	18%	18%
Streamed	Downloaded	Physical purchases

INFRINGEMENT

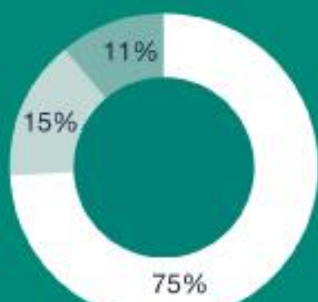
The overall level of infringement (i.e. anyone who had used an illegal source for accessing films in the past 3 months) increased significantly between 2018 (19%) and 2019 (27%), with data from this wave showing that:

● Only legal ● Only illegal ● Mix

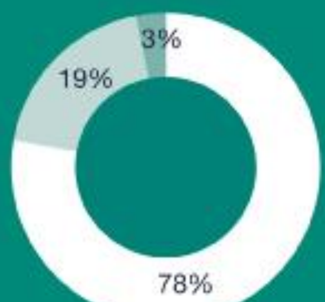
Downloaders + Streamers



Downloading



Streaming



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TV

ACCESSING TV

Streaming was the most common, method of accessing TV programmes/series, by some way, with **42% having done so over the previous 3 months.** 22% had downloaded TV programmes/series, and only 5% had purchased physical products.

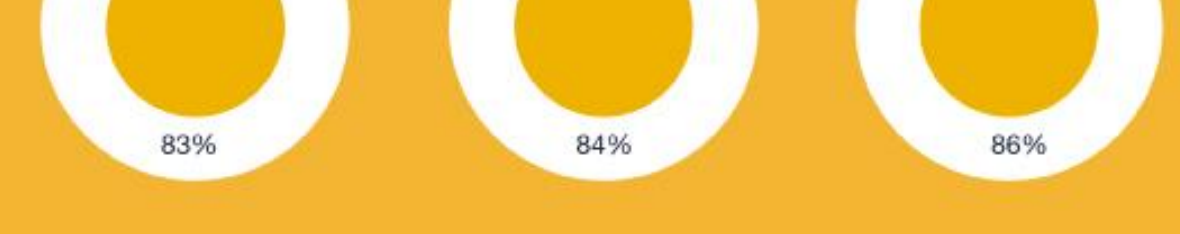
42%
Streamed

22%
Downloaded

5%
Physical purchases

INFRINGEMENT

The overall level of infringement (i.e. anyone who had used an illegal source for accessing TV in the past 3 months) **decreased** between **2018 (23%) and 2019 (17%),** with data from this wave showing that:



Live Sport

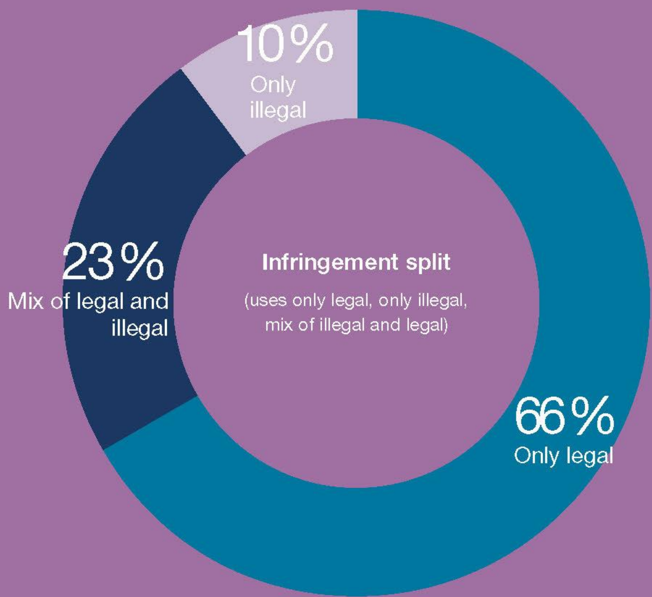
ACCESSING LIVE SPORT

Among the total sample, **14% had streamed live sports in the previous 3 months.**

14%

Streamed

INFRINGEMENT



The overall level of infringement (i.e. anyone who had used an illegal source for live sport in the previous 3 months) was, at 34%, **comparatively high** compared to other content categories. Looking at the levels of infringement in more detail, 66% had used only legal sources, 10% only illegal sources and 23% a mixture of legal and illegal sources.

Video games

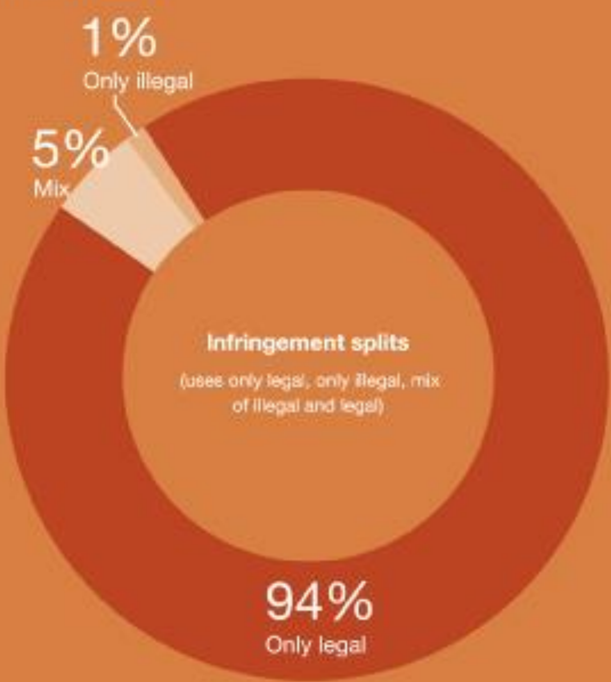
ACCESSING VIDEO GAMES

Downloading was the most common means of accessing video games (18%). Purchasing video games in **physical formats** was also common, relative to other categories, with **13%** having bought them.

18%
Downloaded

13%
Physical purchases

INFRINGEMENT



The **overall level of infringement** (i.e. anyone who had used an illegal source for accessing video games in the previous 3 months) **decreased significantly** between 2018 (16%) and 2019 (6%).

Software

ACCESSING SOFTWARE

Downloading was the most common method of accessing software, with 20% having done so. This was followed by 9% who had streamed software online.

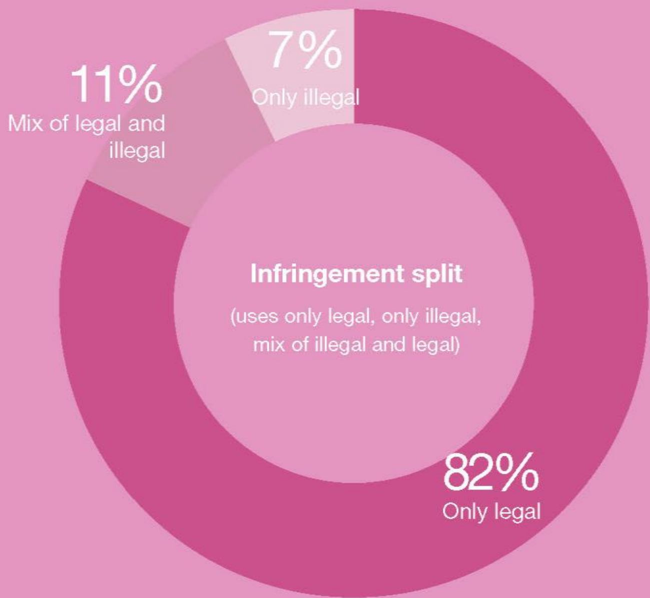
9%

Streamed

20%

Downloaded

INFRINGEMENT



The overall level of infringement (i.e. anyone who had used an illegal source for software in the past 3 months) **decreased slightly** between **2018 (20%) and 2019 (18%).** Data from this wave showed that 82% had used only legal sources, 11% only illegal sources and 7% a mixture of legal and illegal sources.

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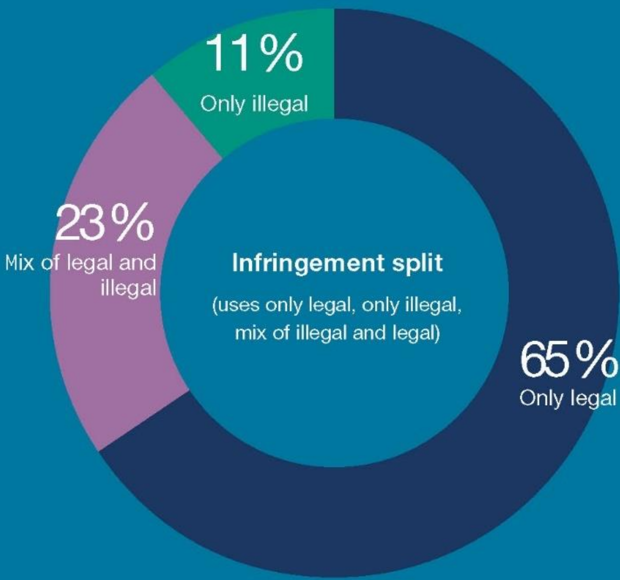
E-Publishing

ACCESSING E-PUBLISHING

In contrast to other content categories, the most common method of access was having purchased physical copies of publications (30%). This was followed by downloading (18%) and then streaming/online access (12%).

12%	18%	30%
Streamed	Downloaded	Physical purchases

INFRINGEMENT



The **overall level of infringement** (i.e. anyone who had used an illegal source for e-publishing in the previous 3 months) **increased significantly**[1] between 2018 (13%), when it was only looking at e-books, and 2019 (35%). Data from this wave showed that 65% had used only legal sources, 11% only illegal sources and 23% a mixture of legal and illegal sources.

Relevant to this increase in the level of infringement is that e - publishing was broadened this year from previously just looking at e - books. However, responses suggest that there may be some additional ambiguity over sources (e.g. a large number of respondents selected "a free website which hosts or links to e - publications.")

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OCI 2019 – Overview and Comparison of Trends

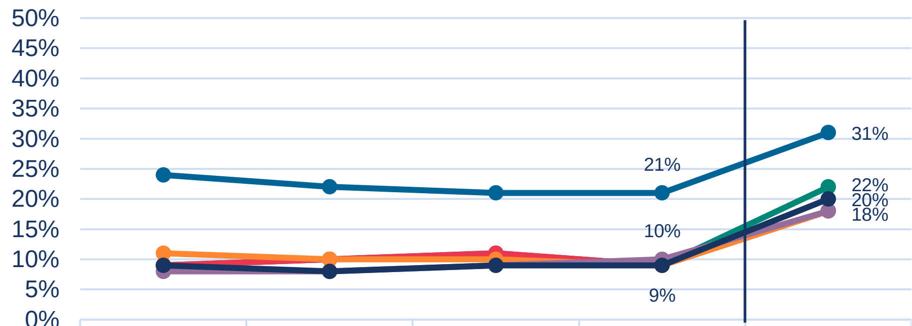
This section provides an overview and comparison of key trends across each content category. It is based on the 2019 wave and also includes yearly comparisons, where relevant. It covers engagement with online content, before looking in detail at levels of infringement, key characteristics of infringers and which legal sources they would be likely to migrate to.

Consumption trends

Downloading

There were large increases from 2018 to 2019 across all categories in the number who had downloaded content in the previous 3 months. It is important to note that there were slight changes[1] to the way in which this question was worded in 2019 (to account for saving offline from streaming services), which could also have contributed to the increase for some content categories.

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.)



	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
Music	24%	22%	21%	21%	31%
TV programmes	9%	10%	11%	9%	22%
Films	9%	10%	11%	9%	18%
E-publishing (previously books)	11%	10%	10%	9%	18%
Video games	8%	8%	9%	10%	18%
Software	9%	8%	9%	9%	20%

Base for March 2019: 5,014 (total sample). Break in the series between Mar-18 and Mar-19 represents change in methodology.

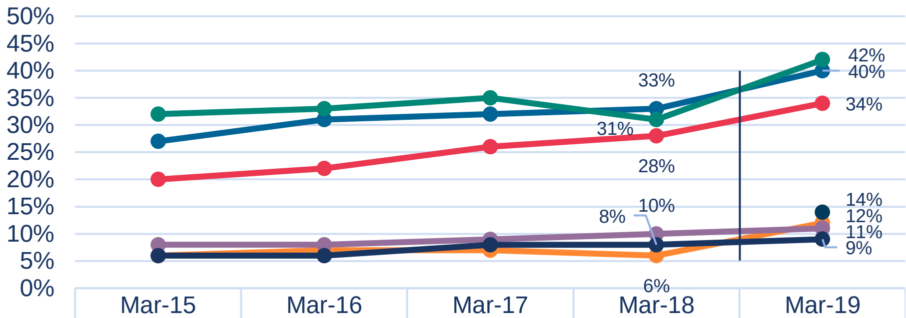
Streaming/accessing

1 2018: Have you downloaded any of the following through the internet in the past 3 months? Please select all that apply. By downloaded we mean that you transferred a copy of the file to your device.
2019: 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.)

There were increases from 2018 to 2019 across all categories in the proportion who had streamed/accessed content online in the past 3 months. These were, in most instances, in-line with the trajectories evident over the past few years.

- The largest increases were for TV programmes (+11%), music (+7%), films (+6%) and e-publishing (+6%).
- Interestingly, while the increase for TV programmes is large, it is just 7% higher than 2017. This would indicate that the dip in 2018 was an anomaly.
- The proportions streaming both video games and software remained steady.

<u>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.)</u>



	Mar-15	Mar-16	Mar-17	Mar-18	Mar-19
Music	27%	31%	32%	33%	40%
TV programmes	32%	33%	35%	31%	42%
Films	20%	22%	26%	28%	34%
E-publishing (previously books)	6%	7%	7%	6%	12%
Video games	8%	8%	9%	10%	11%
Software	6%	6%	8%	8%	9%
Live sports					14%

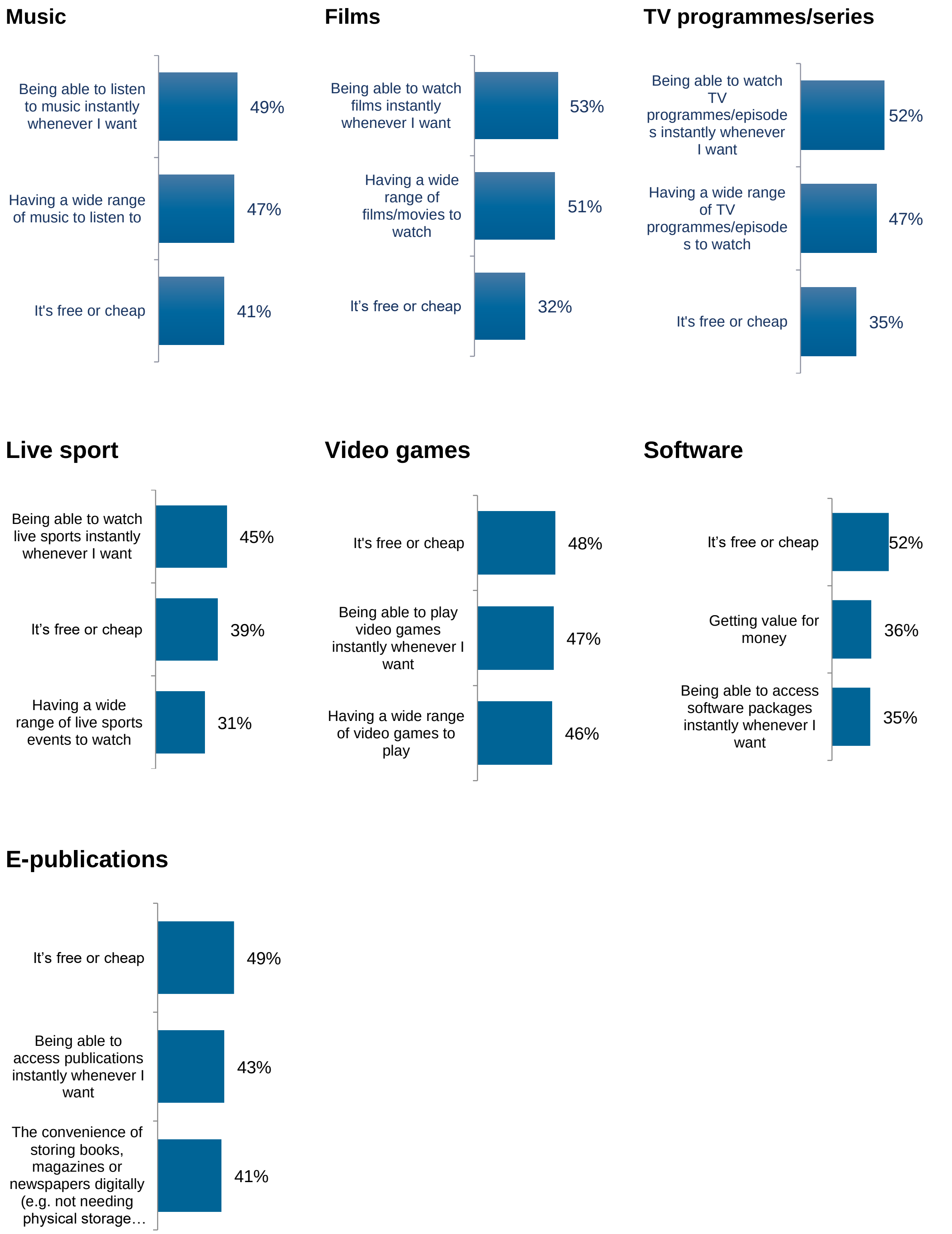
Base for March 2019: 5,014 (total sample). Break in the series between Mar-18 and Mar-19 represents change in methodology.

Reasons for accessing content online

In a new set of questions this wave, 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:

- Above all, online access was thought to be **convenient**. The most selected reason in over half of the categories (music, films, TV programmes/series and live sport), and in the top three for the rest, was that it enables them to consume content “instantly whenever I want”.
- **Offering more choice** was another strong theme. “Having a wide range” of content was in the top three for all categories except for software and e-publications.
- **Cost** was present in the top three for all content categories and, in particular, the statement “It’s free or cheap”. This was the top reason for accessing video games, software and e-publications online.

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)



Base: those who downloaded, streamed or accessed content in each category (music = 2,624, films = 1,959, TV programmes/series = 2,400, live sport = 690, video games = 1,121, software = 1,161, e-publications = 1,149)

Infringement trends

As highlighted in the methodology section, in 2019 there were changes in how the infringement figures were arrived at, which should be kept in mind when making comparisons between the current and past waves.

The main change was that, this year, 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 category ("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. It is interesting to note, as we do in the main section of the report, that people selecting this option tended to be at the older (55+) or younger (12-15) spectrum of our sample.

Overall infringement

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

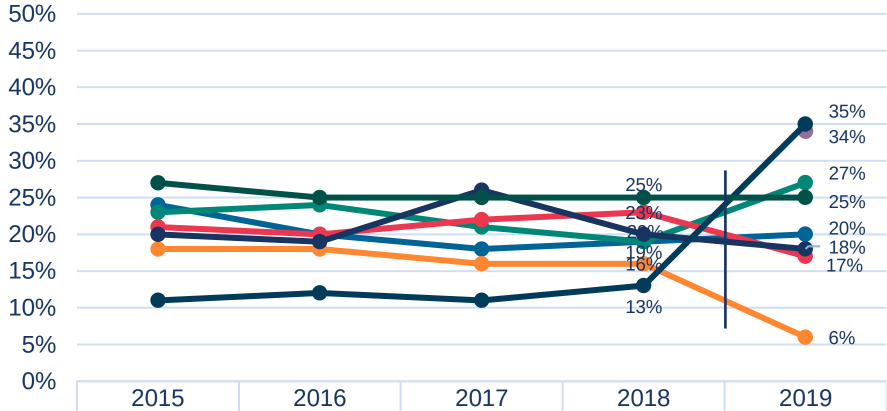
The overall level of respondents who had infringed across any category (excluding digital visual images[2]) remained the same (25%) as it has for the previous three years.

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

- There was an 8% increase in the proportion who had used an illegal source to watch **films** (27%).
- The considerable broadening of the **e-publishing** category, from previously just looking at e-books, was unsurprisingly accompanied by a significant increase (+22%) in the level of infringement. This category had one of the highest levels of infringement overall (35%). However, responses suggest that there may be some additional ambiguity over sources, with few using purely illegal ones (refer to the section on e-publications on page 134 for more details).
- **Live sports**, a new category in this wave, saw one of the highest levels of infringement (34%).
- **Video games** saw the largest decrease in infringement levels across waves, dropping from 16% to 6%.
- TV programmes/series also saw a decrease, from 23% to 17%.
- For **music** and all other categories, the overall level of infringement remained stable.

[2] 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.

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



	2015	2016	2017	2018	2019
Music	24%	20%	18%	19%	20%
Films	23%	24%	21%	19%	27%
TV	21%	20%	22%	23%	17%
Video games	18%	18%	16%	16%	6%
Live sports					34%
Software	20%	19%	26%	20%	18%
E-publishing (previously e-books)	11%	12%	11%	13%	35%
ANY	27%	25%	25%	25%	25%

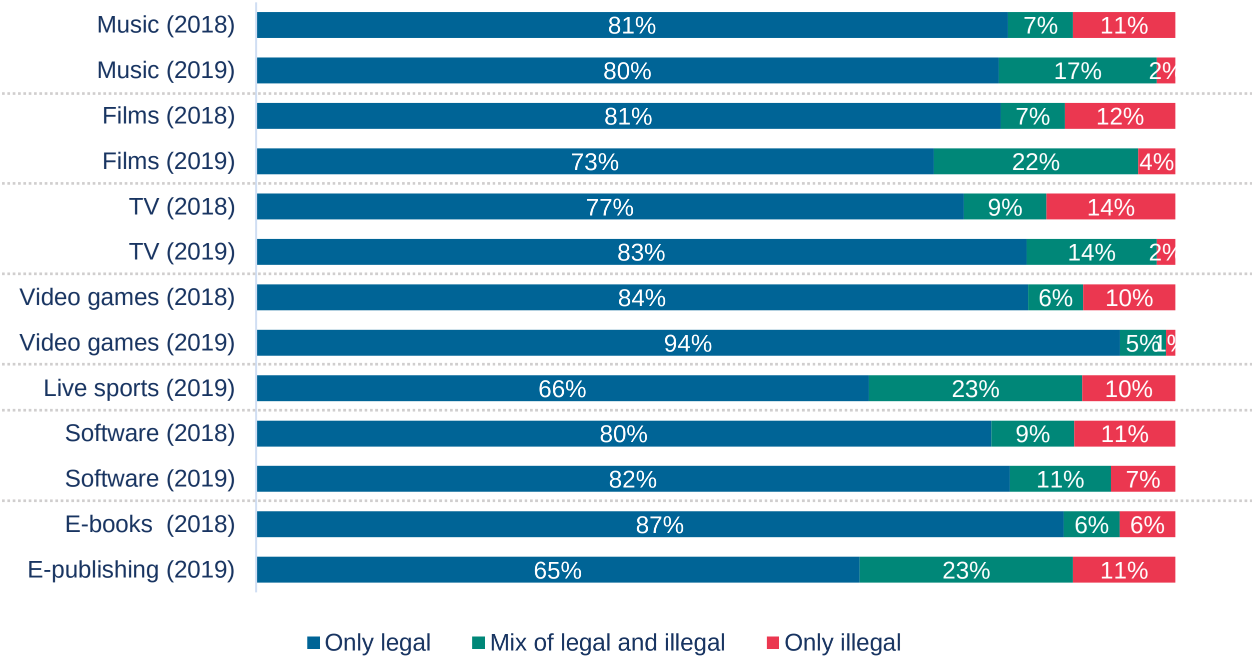
Base for 2019: those who used an illegal source at least once in that category during the past 3 months with "Download/access for free from the internet, without really being sure where it comes from" not counting as either legal or illegal and those who only selected this option not included in the base (music = 2,297, films = 1,922, TV programmes/series = 2,340, live sport = 650, video games = 1,033, software = 997, e-publications = 1,066, ANY = 5,014). 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. Across most categories, it is encouraging to note that between 2018 and 2019 there was a decrease in the proportion who *only* used illegal sources. Where overall infringement levels remained the same, this proportion seemed to migrate towards using at least some legal sources (i.e. being categorised as using a "Mix of legal and illegal sources").

- While for **film** the overall infringement level increased from 2018 to 2019 (by 8%), those using illegal sources only actually fell (from 11% to 2%). The growth was fuelled by those using a mix of legal and illegal sources, which increased from 7% in 2018 to 17% in 2019.
- Though less pronounced, a similar trend was present for a number of content categories:
  - Music (those using illegal sources only fell from 11% in 2018 to 2% in 2019), TV (14% to 2%), video games (10% to 1%) and software (11% to 7%).
- Even for live sports and e-publications, which had the highest levels of those using *only* illegal sources, notably more used a mix of legal and illegal sources (23% respectively).

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

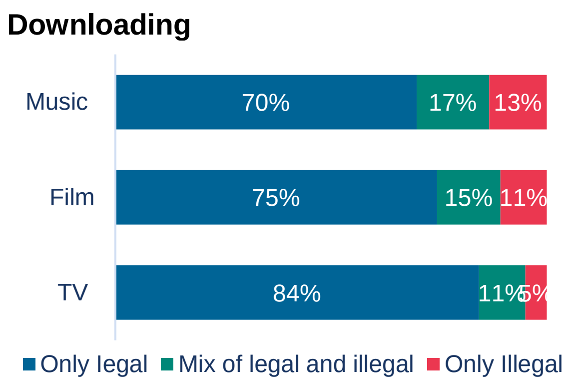


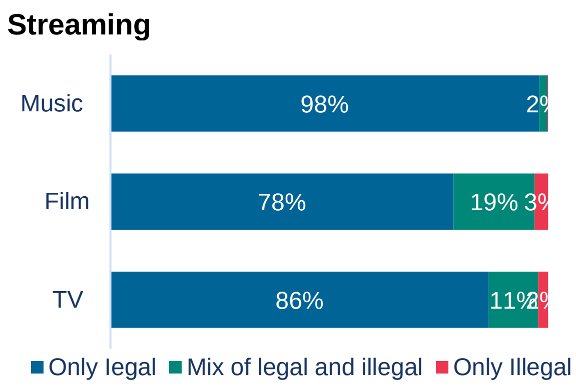
Base for 2019: those who have used an illegal source at least once in that category during the past 3 months with "Download/access for free from the internet, without really being sure where it comes from" not counting as either legal or illegal and those who only selected this option not included in the base (music = 2,297, films = 1,922, TV programmes/series = 2,340, live sport = 650, video games = 1,033, software = 997, e-publications = 1,066)

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. When isolated, there were some notable differences both within and across categories:

- **For music, infringement levels were considerably lower for streaming than downloading**. Only a very small number (2%) had used any illegal sources to stream music. Infringement in downloading was more common, with 30% having used an illegal source (17% using a mix of legal and illegal sources and 13% using illegal sources only).
- The overall levels of infringement in **film** were broadly similar for both downloading (25%) and streaming (22%). However, those who **download** (11%) were more likely to use illegal sources only, compared to those who stream (3%).
- **Consumers of TV programmes/series displayed the most uniform infringement behaviours across downloading and streaming**. Overall, 16% downloaded illegal content and 14% streamed it. In both instances, 11% were using a mix of illegal sources, while slightly more used illegal sources only to download (5%) than to stream (2%).





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 = 1,478, film downloading = 859, TV downloading = 1,052, music streaming = 2,015, film streaming = 1,719, TV streaming = 2,107)

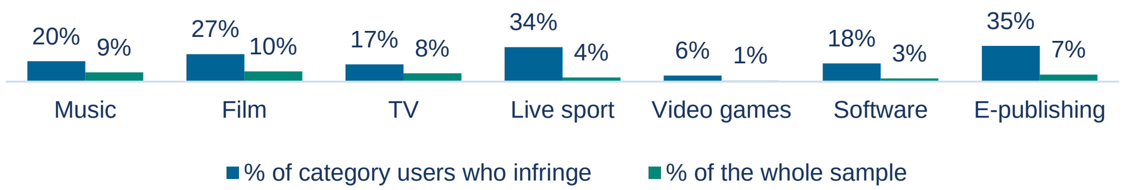
Profiles of infringers

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 the population within the UK.

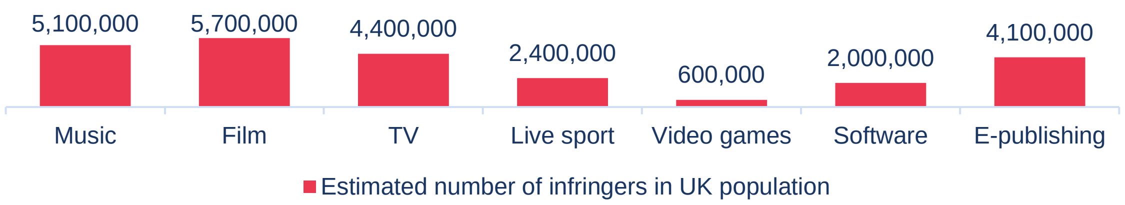
Base sizes for infringers (in each content category) are inclusive of anyone who has used an illegal source within the last 3 months.

- E-publishing (35%) and live sport (34%) had the highest levels of infringement overall.
- Film (27%), music (20%) and TV (8%) had lower levels of infringement but more people overall who had infringed. For example, for film this was 10% of our sample which equates to 5,700,000 people in the UK.

Infringement in each category and whole sample (%)

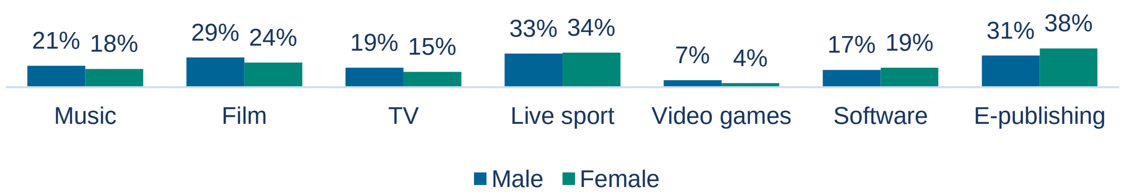


Estimated number of infringers for each category in UK population



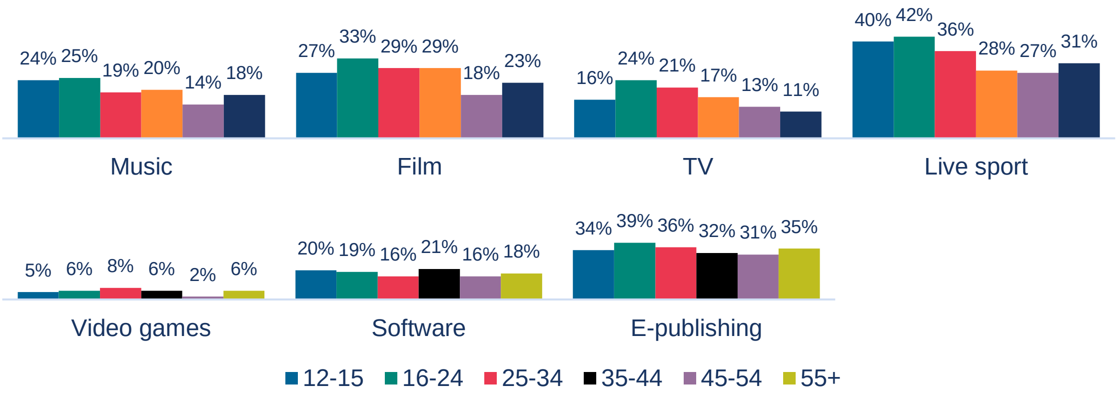
- Infringers of music, film, TV and video games were more likely to be **men.**
- **Women** were more likely to access e-publishing content illegally.

Infringement in each category by gender (%)



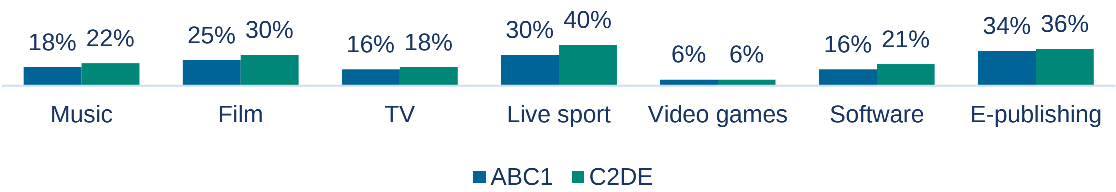
- Across music, film, TV and live sport, the highest levels of infringement were by those **aged 16-24**. There was also a general trend in these categories whereby levels of infringement decreased as people got older. However, for music, film and live sports there was a slight increase again among the 55+ age group.
- In comparison, software and e-publishing had a more even distribution of infringement across the age groups.

Infringement in each category by age (%)



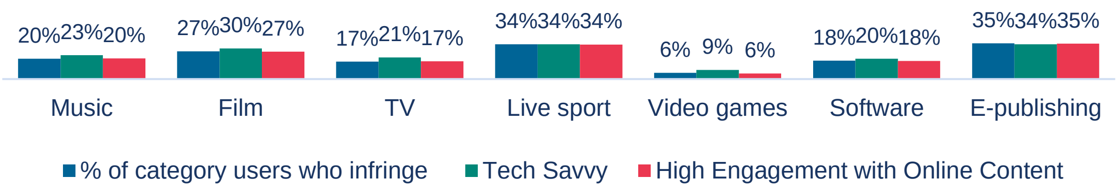
- Those with a **C2DE social grade** were, across most categories, more likely to infringe, compared to those from ABC1 categories. This was most pronounced for live sport (+9%), film (+6%) and software (+5%).

Infringement in each category by social grade (%)



- Those identified as being **"Tech savvy"**[3] were more likely to be infringers across a number of categories, when compared to the total population. This difference was greatest for TV (+4%), video games (+3%), music (+3%) and film (+3%).
- It is interesting to note that those who were identified as having a "High engagement with online content"[4] were not more likely to infringe when compared with the total population.

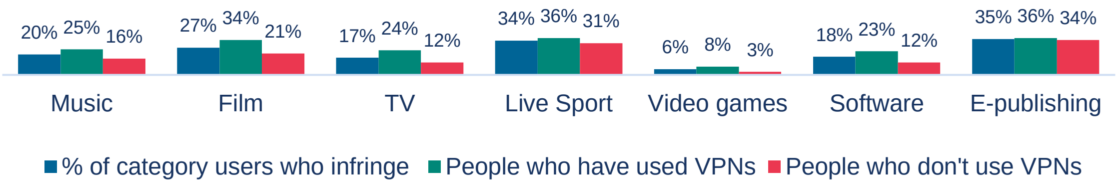
Infringement in each category by whether they are 'Tech savvy' or have 'High Engagement with Online Content' (%)



- Across all categories, respondents who had used VPNs were more likely to have infringed compared to those who had not. This difference was most pronounced in film (+13%), TV (+11%), software (+11%) and music (+8%).

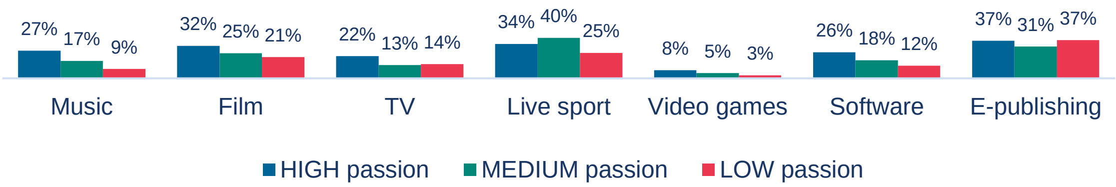
[3] Answered either "strongly agree" or "agree a little" for both "I am usually among the first of my friends to try new devices and mobile apps" and "People often ask my advice about new devices and mobile apps"
[4] Answered either "strongly agree" or "agree a little" for "I spend a lot of time accessing content on the internet"

Infringement in each category by use of VPN (%)



- Across several categories there was a pattern of those with the **highest passion[5] for that content being most likely to infringe**, which subsequently decreased in those with medium and low levels. This was most evident in music where the infringement levels decreased by 18% from high to low passion levels. Though less pronounced, similar decreases were present for software (-13%), film (-11%) and TV (-8%).
- Interestingly though, for **live sport**, which is often associated with elevated levels of passion/fandom, those with high levels were less likely to infringe than those with medium.

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 = 2,297, films = 1,922, TV programmes/series = 2,340, live sport = 650, video games = 1,033, software = 997, e-publications = 1,066)

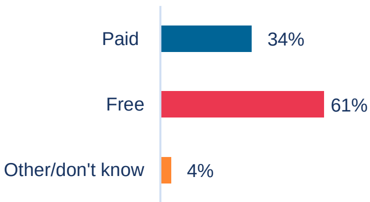
[5] Passion levels were derived by scoring answers to a range of statements. The full list of statements can be found in the category sections of the report. They were scored on the basis of strongly agree=1, agree a little=2, disagree a little=3; strongly disagree=4. "High" was a score of 6-12, "Medium"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

Reducing infringement

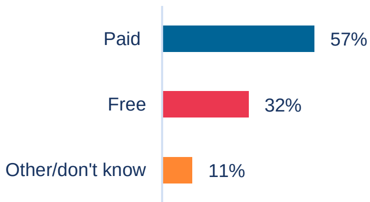
Respondents who had used illegal sources at least once in the last 3 months were asked what they would do if those sources were no longer available to them. They were presented with a list of individual (paid and free) legal options and asked to select the one they would be most likely to use.

- Paid sources were most commonly selected for **video games (68%)**.
- Respondents were more likely to select paid options for **film** (57%) when compared to TV (46%).
- While **music** had the lowest proportion saying they would migrate to a paid source, a third (34%) still would. The most common free source was “A site such as YouTube, Vevo or Vimeo to watch/listen to music” (35%).

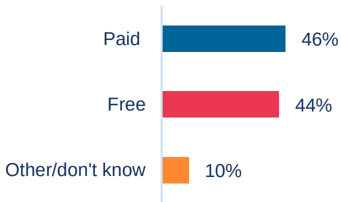
Music



Film



TV



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)”

38%
would “Pay for a subscription, or use a paid-for premium tier of a video streaming service (e.g. Netflix, Amazon Prime Video)”

30%
would “Pay for a subscription to, or use a paid-for premium tier of a video streaming service (e.g. Netflix, Amazon Prime Video, DisneyLife, NowTV etc.)”

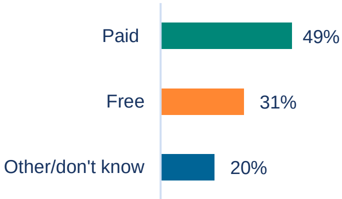
Top free alternative:

35%
would use “A site such as YouTube, Vevo or Vimeo to watch/listen to music”

15%
would “Watch for free via sites such as YouTube, Vevo or Vimeo to watch”

24%
would use “TV Catch-up services (BBC iPlayer, 4OD etc.)”

Live sport



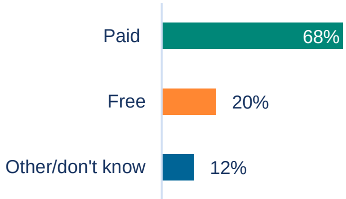
Top paid alternative:

23%
would use “A paid subscription to a sports platform that can be accessed online (Sky-go, BT Sport, Sky Sports, NOWTV, Amazon Prime etc.)”

Top free alternative:

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”

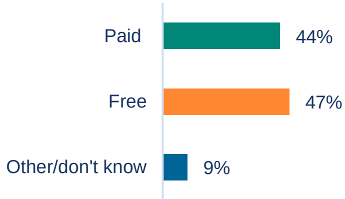
Video games



29%
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.”

20%
would download “video games for free through Apple App Store, Google Play, Playstation or Xbox Store, Steam, Origin etc.”

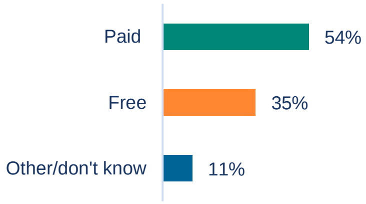
Software



31%
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”

47%
would use “For free via a software creator’s store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook”

E-publications



Top paid alternative:

20%
would “Buy physical copies of publications (e.g. books, magazines etc.) through stores”

Top free alternative:

35%
would access “content made available for free by publishers on their own social media or website (e.g. articles on op-eds etc.)

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 = 2,297, films = 1,922, TV programmes/series = 2,340, live sport = 650, video games = 1,033, software = 997, e-publications = 1,066)

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 ninth 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.

This year, the IPO commissioned AudienceNet to conduct the OCI study. 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

Previously research was purely quantitatively with 4,500 online and 500 face-to-face. This year Audience Net employed a two-staged, mixed methodology, approach. The process was designed to replicate robust measurement while also offering additional depth of insight.

<u>Stage 1: Online Survey</u>
Online data collection, with fieldwork taking place between 29/03/19 and 15/04/19
15-minute survey
N=5,000
Nat Rep of UK +12 population

<u>Stage 2: Ongoing Qualitative Engagement</u>
Online Community
5 days
Mixture of research tasks, experimental conditions and discussion topics
N=50

<u>Stage 1 – Online Survey</u>

Prior to AudienceNet undertaking Stage 1, the IPO team had conducted an internal audit of the existing OCI questionnaire. This process led to the streamlining of the questionnaire and the establishment of priority areas for AudienceNet to build upon.

The main change to the questionnaire 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. Owing to this change, as expected, there have been some notable increases since previous waves in the illegal figures (for categories including films and e-publications).

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. Another change to this year's methodology was that, for cost and efficiency reasons, 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 is comprised of people who have opted in to take part in research.

The survey took, on average, 16 minutes for respondents to complete. There was a dropout rate of 15%.

This year, **8 content categories were included** in the research: music, film, TV programmes/series, live sports, video games, software, e-publications 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.

While live sports were the only new category in 2019, some categories experienced notable changes since previous years that impact comparability with previous data:

- Previously, the focus was on e-books only whereas this year the category was extended to include online e-publications (e.g. newspapers, magazines etc.).
- A more thorough description was included to define what "digital visual images" refer to.

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**. It also sought to **test and co-create communications materials** 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.

For reasons of qualitative validity (i.e. convergence of insights), six of the content categories were focused on in-depth in the Community, with approximately even numbers in each. The categories of film and TV programmes/series were combined, given the crossover, and therefore had more respondents than the others.

Number of Respondents (N=50):

- Music (N=8+)

- Film/TV (N=12+)
- Live Sports (N=8+)
- E-Publishing (books, newspapers, magazines etc.) (N=8+)
- Video Games (N=8+)

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 2019 data, with comparisons made with previous waves where relevant.

Each content category then has its own bespoke section, based on 2019 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 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.

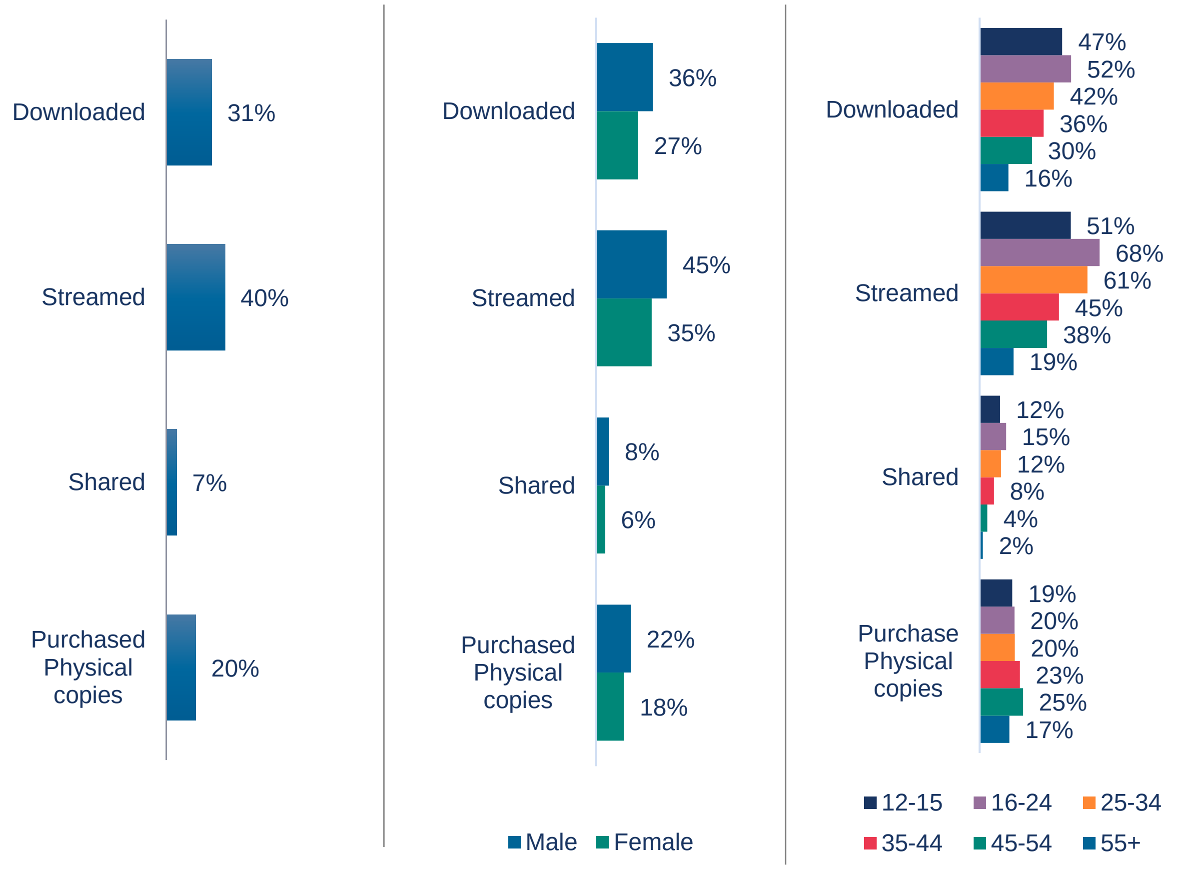
Music

Engaging with music

55% 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 40% having done so. Downloading followed at 31%, with notably fewer having purchased physical music (20%).
- 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[6]/purchased physical copies of music in the past 3 months?



Base: 5,014 (total sample)

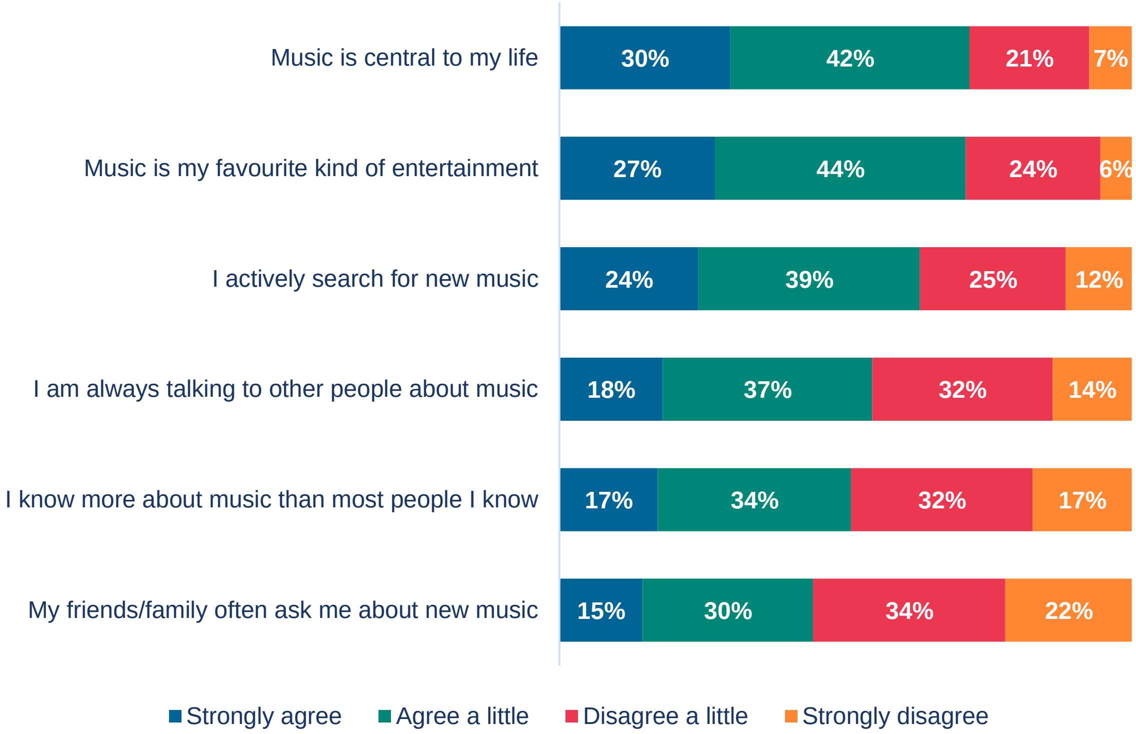
To get a broader sense of **their passion for music**, respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

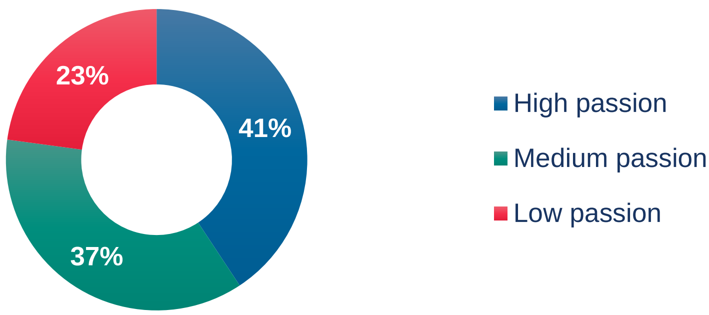
- Four in ten (41%) displayed **high levels of passion for music**. This was most evident in those aged 12-15 (55%) and lowest among those aged 55+ (24%).

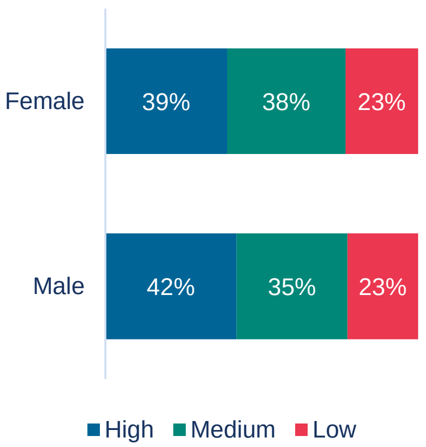
[6] The definition of 'shared' given was: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in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

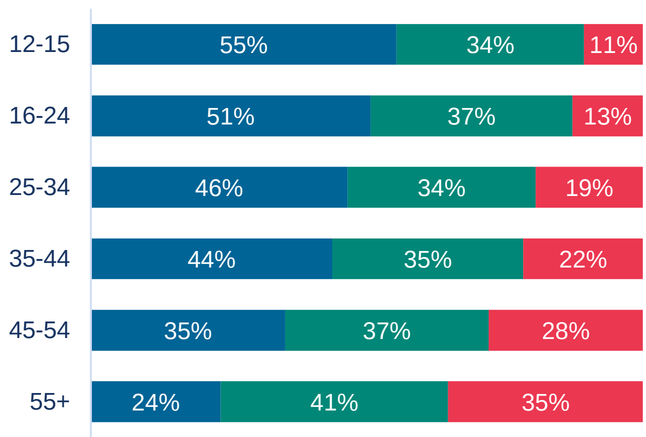
- More generally, responses to specific statements indicated the **importance of music**. Just under three-quarters said that it is “central” to their lives (72%) or that it is their “favourite kind of entertainment” (71%).

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









Base: 3,121 (downloaded, streamed, shared and/or purchased physical copies of music in the past 3 months)

Qualitative insights

Respondents noted that beyond simply providing entertainment, music offers additional benefits such as facilitating relaxation and an uplift in mood.

Engagement with music is frequent and it often has a set role in daily routines. As such, it is often played while getting ready in the morning, commuting, while at work or university and at the gym. Because of this, music is typically accessed in a variety of locations, across a range of devices.

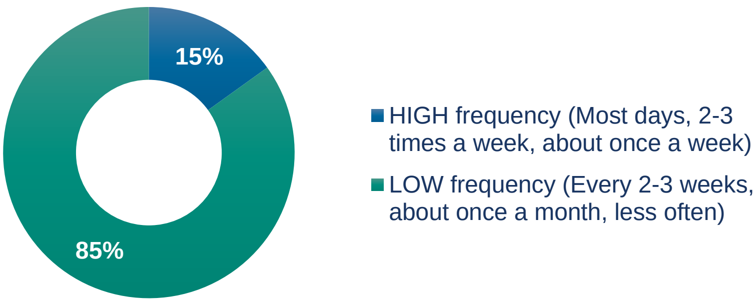
- ***"I can't live without music**. I listen to music most days. **Music relaxes me** as well as brightens my day." – Male, 45-44*
- *"Music is important for a couple of reasons. First**, I simply enjoy listening to music**. Second, I like to **use music as background noise,** sometimes while playing video games when my friends are not online." – Male, 20-24*
- ***"I love music - I use it as an escape**, and it helps me concentrate when I'm doing things like working or running etc." – Male, 25-34*
- *"Music is like food for me. I need to hear music at some point every day."- Female, 35-44*
- *"I simply cannot live without music. It cheers me up when I'm sad, keeps my day moving along and cheerful, entertains me, inspires me and helps to keep a happy disposition." - Female, 45-54*

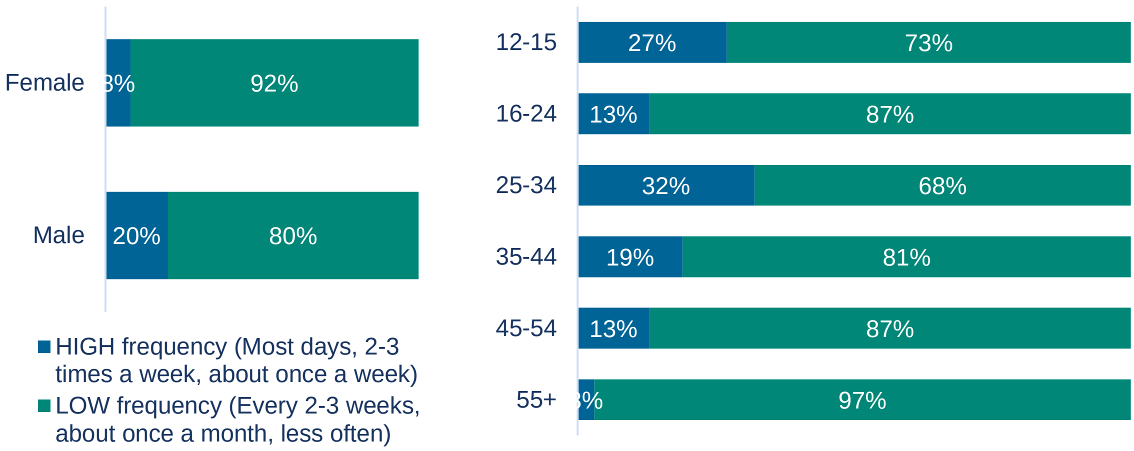
Physical purchasing of music

Respondents were asked about purchasing music in physical formats, specifically CDs or vinyl, focusing on frequency and number of purchases made.

- Only a minority (15%) were frequent purchasers of CDs or vinyl records.
- On average, respondents purchased nine physical items during a three-month period, with the majority (91%) of these being albums rather than singles.
- Male respondents were, compared to females, more likely to make physical purchases frequently and in larger amounts.

<u>A3. Generally, how often do you purchase physical CDs or vinyl records?</u>

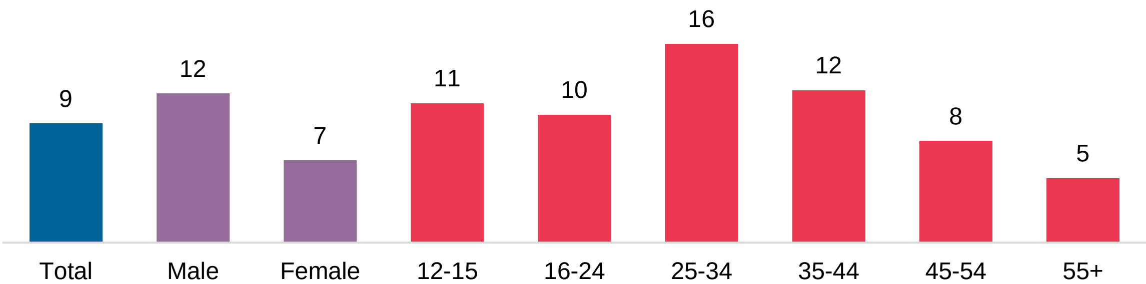




Base: 1,010 (purchased physical copies of music in the past 3 months)

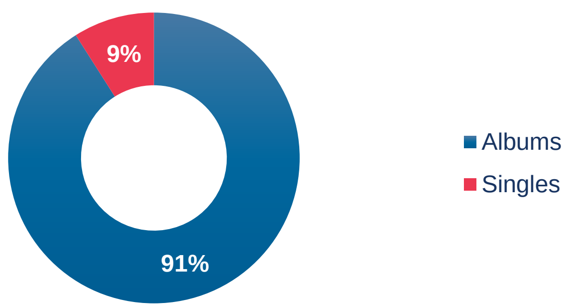
88% had purchased 20 or fewer physical music products in the previous 3 months.

A4. In the past 3 months how many physical music products (CDs, Vinyl etc.) did you purchase? (Average purchases)



Base: 923 (purchased physical copies of music in the past 3 months)

A5. And of your physical music purchases, how many were albums and how many were singles?



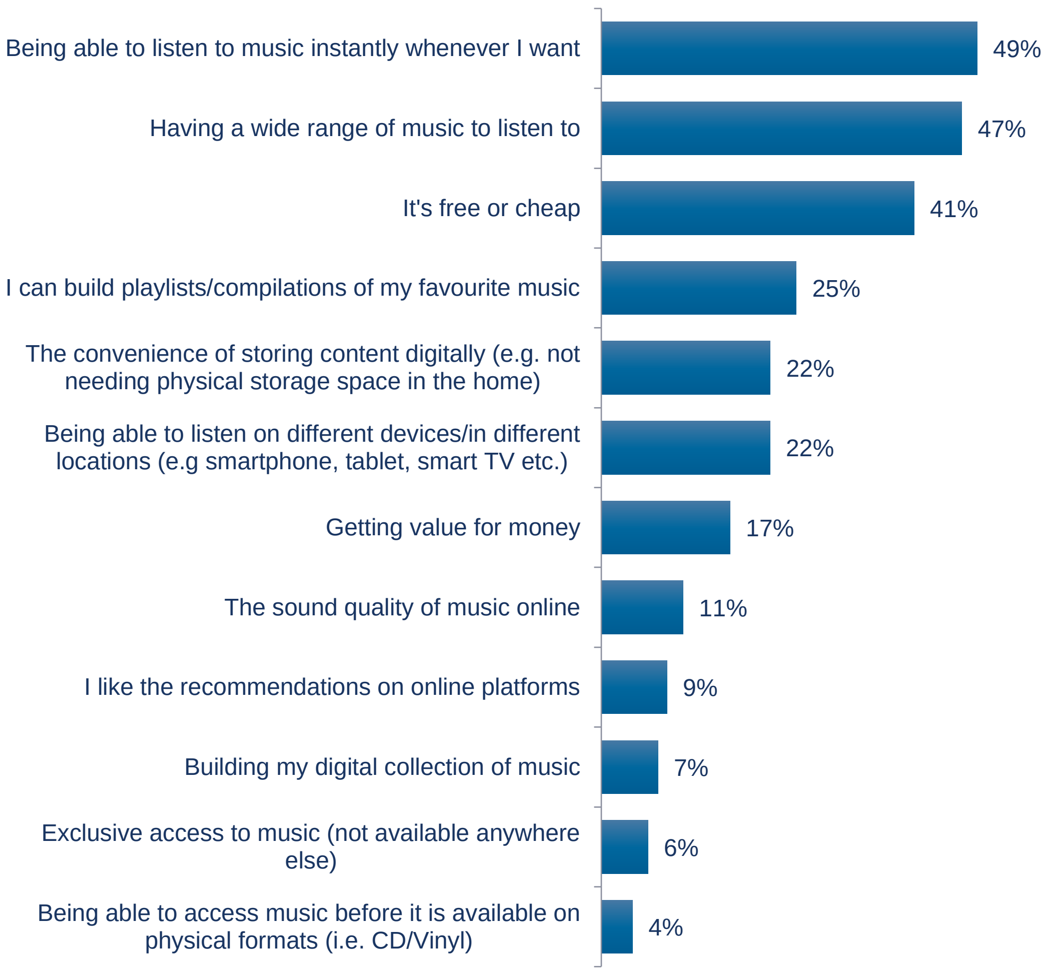
Base: 977 (purchased physical copies of music in the past 3 months)

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 three most selected, by some way, related to **convenience** (49% “Being able to listen to music instantly whenever I want”), the **range** of options available (47% “Having a wide range of music to listen to”) and **price** (41% “It's free or cheap’). The same 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. Furthermore, “Getting value for money” was selected by just 17%, compared to the 41% selecting free or cheap, suggesting that people may be less inclined to see the need to pay for these additional benefits.

<u>A6. What are the main reasons that you choose to access music online (i.e. downloading or streaming) Please select your top 3. (%)</u>



Base: 2,624 (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 (47%) 2. Having a wide range of music to listen to (46%) 3. It's free or cheap (41%)	1. Being able to listen to music instantly whenever I want (52%) 2. Having a wide range of music to listen to (48%) 3. It's free or cheap (41%)

Aged 12-15	Aged 16-24
1. Being able to listen to music instantly whenever I want (51%) 2. It's free or cheap (40%) 3. Having a wide range of music to listen to (35%)	1. Being able to listen to music instantly whenever I want (52%) 2. Having a wide range of music to listen to (48%) 3. It's free or cheap (41%)
Aged 25-34	**Aged 35-44**
1. Being able to listen to music instantly whenever I want (47%) 2. Having a wide range of music to listen to (45%) 3. It's free or cheap (39%)	1. Having a wide range of music to listen to (51%) 2. Being able to listen to music instantly whenever I want (46%) 3. It's free or cheap (39%)
Aged 45-54	**Aged 55+**
1. Being able to listen to music instantly whenever I want (52%) 2. Having a wide range of music to listen to (51%) 3. It's free or cheap (38%)	1. Having a wide range of music to listen to (52%) 2. It's free or cheap (52%) 3. Being able to listen to music instantly whenever I want (48%)

Qualitative insights

When explored in more depth in qualitative discussions, there was a sense that, for many, **convenience and the range** available had made online consumption the most attractive way to access music.

Paid for features, such as platform recommendations and curated playlists, were very much valued by those who had access to them.

In terms of cost, some noted that online gave them the opportunity to make better informed decisions on what to purchase. For example, having the opportunity to listen to tracks before committing to paying to download a full album.

- *“The internet has changed my life completely when consuming music… The best thing about music being available online is that I can listen to music whenever I want, wherever I like.” – Female, 20-24*

- *“You can be anywhere in the world and have music at your fingertips due to the fact it’s so easy to listen to online. Guess there is no need to buy CDs and have a collection gathering dust.” – Male, 45-54*

- *“The best thing about music being available online is that there are many different ways to consume music (streaming the audio only, music videos on YouTube), and various options for storing/accessing/buying music (Google Play Music, Amazon Music, iTunes). The bad thing about music being available online, is that sometimes servers go down, so if you haven't got a backed up local copy of the music you have bought, you cannot access it.” – Male, 20-24*

- *“The best thing about music being online is the ease of finding it and sampling it before buying.” – Female, 35-44*

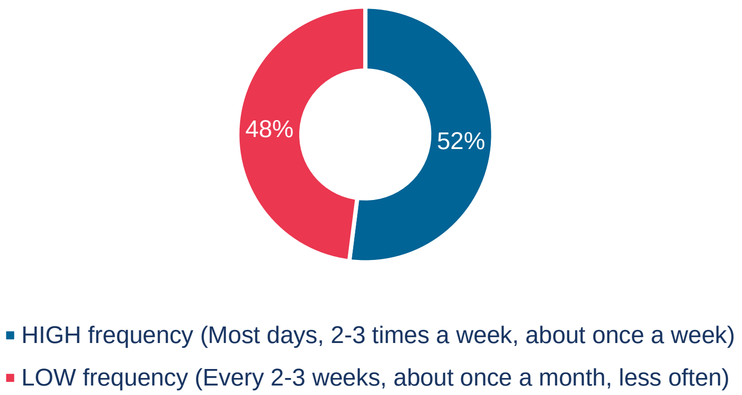
Downloading music

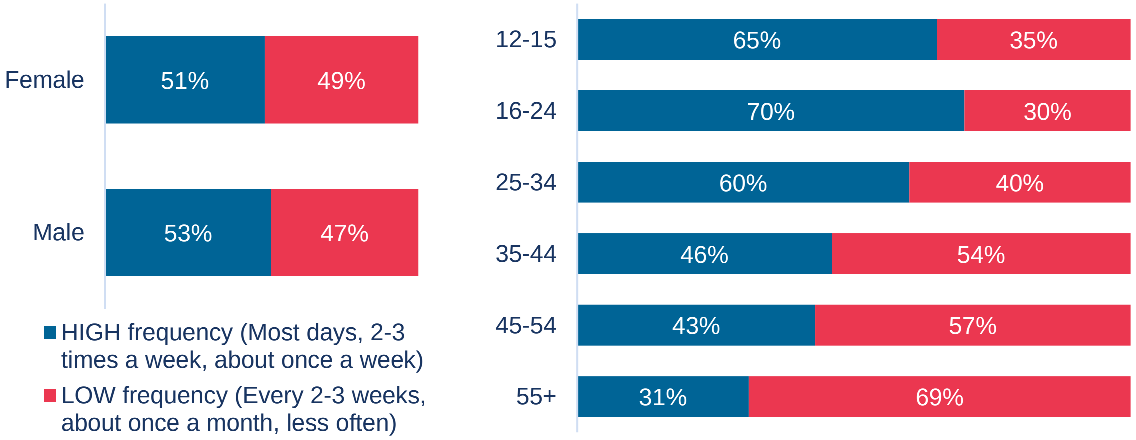
The 31% who had downloaded music during the previous 3 months were asked more questions around frequency, volume and sources used.

Frequency and volume of downloading music

- Over half (52%) of those who downloaded music did so frequently (i.e. at least once a week). **Weekly downloading was more common among younger age groups**, with 70% of those aged 16-24 doing so.
- Respondents downloaded, on average, 94 tracks every 3 months. Downloading was most prevalent among men (106 tracks every 3 months) and those aged 16-24 (160 tracks every 3 months).

<u>A7. Generally, how often do you download music tracks or albums through the internet? (%)</u>

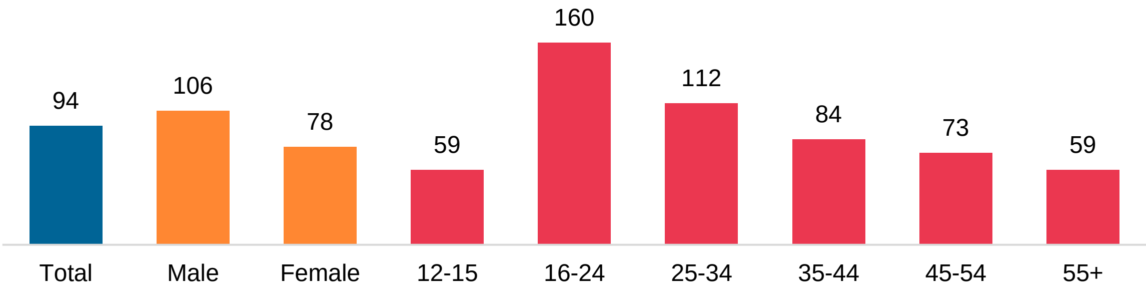




Base: 1,622 (downloaded music in the past 3 months)

29% had downloaded 10 or fewer tracks in the previous 3 months, while more than a third (37%) had downloaded more than 50 tracks in that same time period.

A8. In the past 3 months how many tracks did you download through the internet? (average number of downloads)



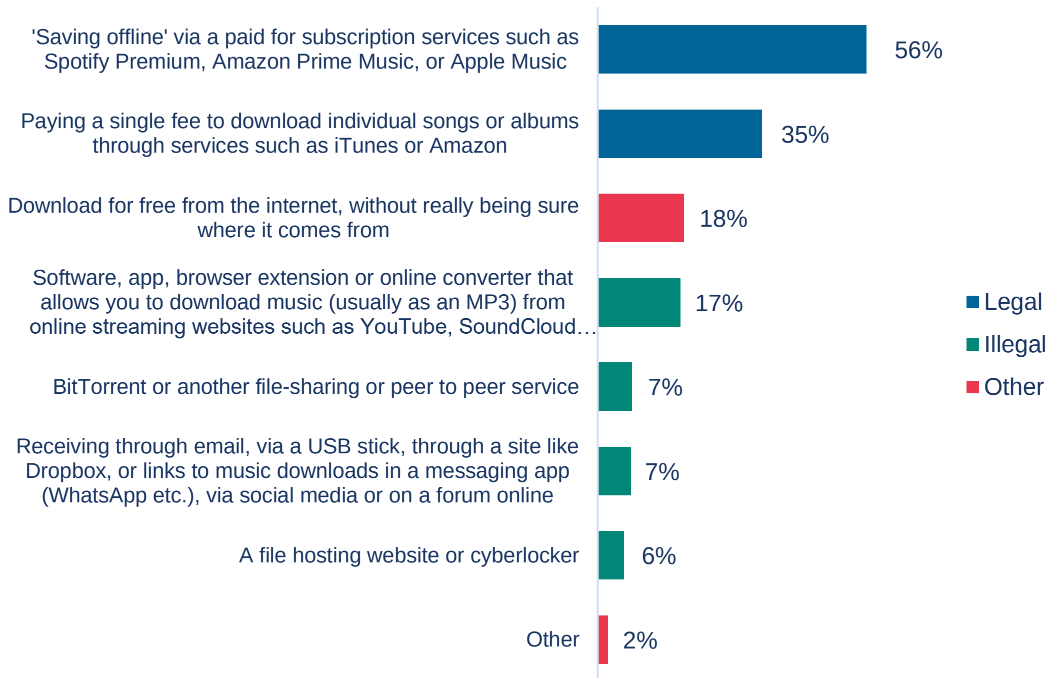
Base: 1,613 (downloaded music in the past 3 months)

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 over half (56%) of all music downloaders. This was followed by around a third (35%) paying "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 (17%).** Other than this, no illegal method was selected by more than 7%.
- A **notable proportion were unsure** of exactly where they were downloading or receiving downloads from. This was most evident in the youngest (20% of those aged 12-15) and oldest (24% of those aged 55+) respondents.

A9. 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 services such as Spotify Premium, Amazon Prime Music, or Apple Music	56%	57%	51%	75%	63%	54%	56%	37%
Paying a single fee to download individual songs or albums through services such as iTunes or Amazon	34%	35%	36%	22%	36%	40%	40%	34%
A file hosting website or cyberlocker	6%	4%	5%	11%	9%	4%	2%	2%
BitTorrent or another file-sharing or peer to peer service	9%	5%	5%	6%	10%	10%	5%	5%
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	19%	15%	20%	24%	16%	18%	10%	16%
Receiving through email, via a USB stick, through a site like Dropbox, or links to music downloads in a messaging app (WhatsApp etc.), via social media or on a forum online	6%	9%	8%	7%	10%	7%	5%	4%
Download for free from the internet, without really being sure where it comes from	18%	19%	30%	12%	18%	14%	14%	24%

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

Base: 1,596 (downloaded music during the past 3 months)

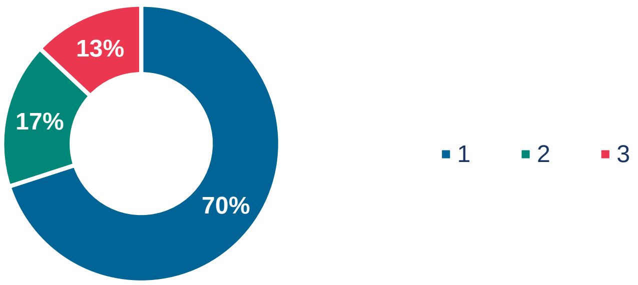
Legality of music downloads

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.

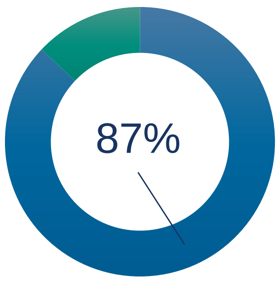
The answer option "download for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

- Legal Sources:
  - Overall 87% had used at least one legal source to download music.
  - The highest proportion, by some way **(70%), had used only legal sources**.
  - Those aged 45-54 were most likely (79%) to have used only legal sources.
- Illegal Sources:
  - **30% had used at least one illegal source** to download music.
  - 13% had used only illegal sources to download music.
  - Those aged 16-24 more most likely (36%) to have used an illegal source.
  - 36% of those with a high level of passion for music had used an illegal source compared with 18% of those with a low level.
- Mixed:
  - 17% had used a mix of legal and illegal sources.
  - Use of a mix of legal and illegal sources was highest among those aged 16-24 (23%) and 25-34 (22%).

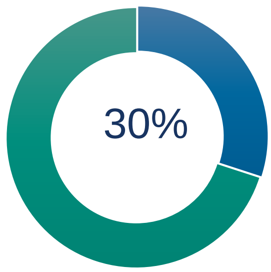
- 25% of those with a high level of passion for music had used a mix of legal and illegal sources, compared with 10% of those with a medium level.

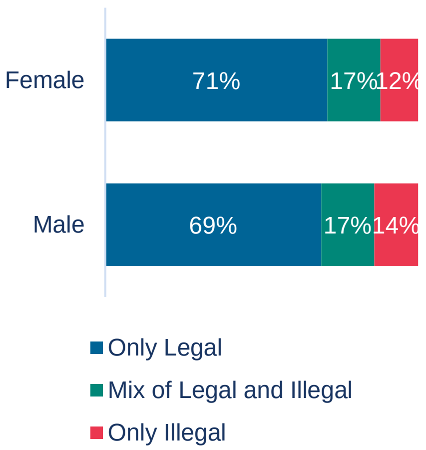


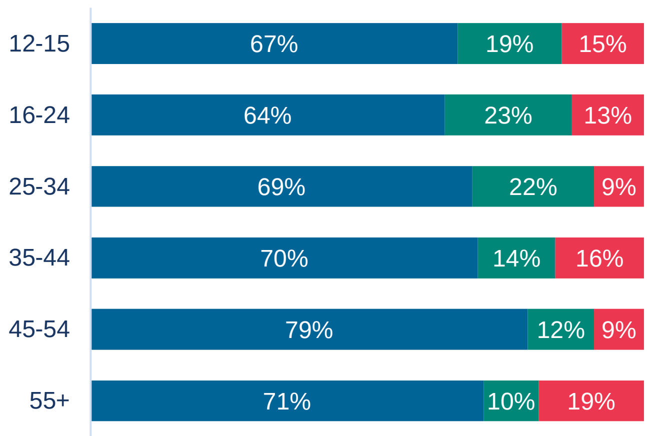
Any legal

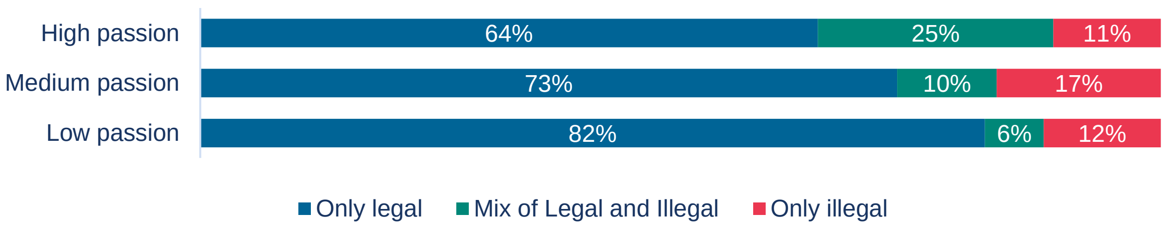


Any illegal









Base: 1,478 (downloaded music in the past 3 months, with those who selected 'other' or 'not sure of source' removed).

A10. And how is the way you download music typically split across the following sources? (average % of their time)

Legality	Source	Average % of usage split	Average number of downloads
Legal	Saving offline via a paid for subscription services such as Spotify Premium, Amazon Prime Music, or Apple Music	47%	64
	Paying a single fee to download individual songs or albums through services such as iTunes or Amazon	24%	11
Illegal	Software, app, browser extension or online converter that allows you to download music (usually as an MP3) from online streaming websites such as YouTube	9%	5
	BitTorrent or another file-sharing or peer to peer service	3%	2
	A file hosting website or cyberlocker	2%	1
	Receiving through email, via a USB stick, through a site like Dropbox, or links to music downloads in a messaging app (WhatsApp etc.), via social media or on a forum online	2%	1
Other	Download for free from the internet, without really being sure where it comes from	11%	6
	Other	2%	3

Base: 1,613 (downloaded music in the past 3 months)

Qualitative insights

Qualitative discussions highlighted **offline access and cost** as being the primary drivers of illegal downloading.

In terms of **offline access**, there was a desire to have music available on their devices and not to have to use up internet data or require wifi to be able to listen/watch. While the actual process of downloading illegally was considered by some to be time-consuming, the benefits were seen as outweighing the inconvenience.

Being able to download music for free was also seen as **directly saving them money** (i.e. the cost of paying via legal methods). While some identified restrictions, such as certain tracks not being unavailable to download via illegal methods, the approach was generally seen as effective and sufficient for their needs.

- *"If I want to download an album I'll use a torrent site like Pirate Bay or Utorrent. You need an internet connection to torrent but once it's downloaded you can put it on your phone or computer for offline use." - Female, 35-44*

- *"I like being able to access music for free through converters and torrent sites, as this allows me to download and keep local copies without the large expense." - Male, 20-24*

- *"I download MP3s from the Internet, so I can save music onto my phone and don't have to worry about using my mobile data." - Female, 20-24*

- *"I use torrent sites to download music sometimes (generally for songs that are in the charts/ top 40). I also use YouTube to stream copyright free music from channels like NoCopyrightSounds and watch music videos from artists I follow on here. I* *sometimes use YouTube rippers to download music from my favourite artists (so I can still listen offline until I can afford to buy a copy)." - Male, 20-24*

- *"The ways I access music online for free are YouTube, online converter websites such as arabvid.org, apps such as Imusic and Iplayer GR… The main strengths of online converter websites are that you are able to download music onto your phone or laptop and listen to music offline for free. You can choose where to store it and whether you want to download MP3 or MP4 versions. However, the risk associated with this is some websites are unreliable and can be risky, causing your laptop or computer and even your phone to catch a virus. Also, the sound and picture quality are not always good. It is also a long process. Free apps (Imusic and Iplayer GR) are easier, hassle-free, do not take as long as online music converters, and literally it is on my phone and I can listen to music offline don't need internet to access my music, unlike YouTube." - Female, 20-24*

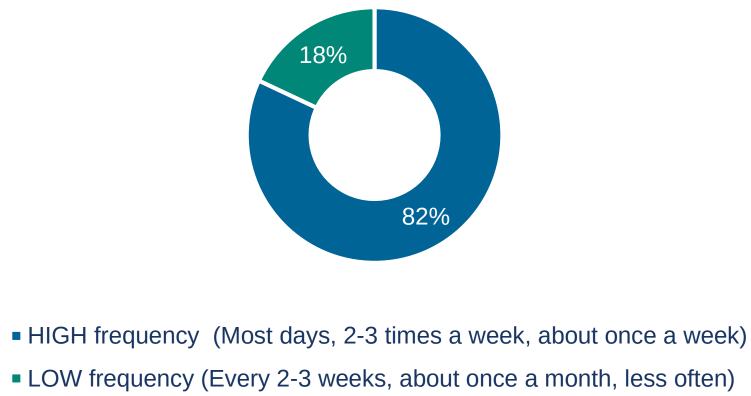
Streaming music

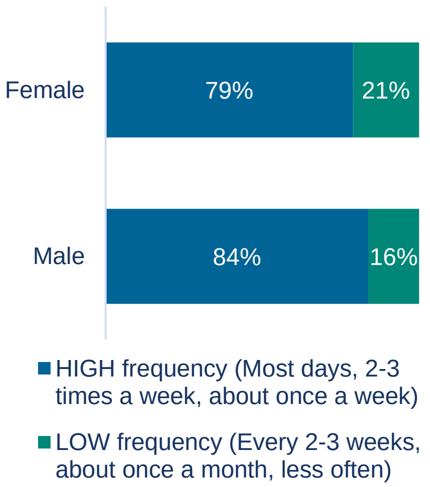
The 40% who had streamed music online during the previous 3 months were asked questions around frequency, volume and sources used.

Frequency and volume of streaming music

- **The majority (82%) of those who streamed music did so frequently** (i.e. at least once a week). This was significantly higher than the number who downloaded music within the same time period (52%).
- The **younger age group**s (those aged 12-44) were more likely to be frequent streamers, compared to those aged 45+. This is also reflected in the number of hours they spent streaming (e.g. those aged 16-35 estimated that they streamed, on average, 188 hours in the previous 3 months compared with 43 hours for those aged 55+).

A11. Generally, how often do you stream music tracks or albums through the internet? (%)

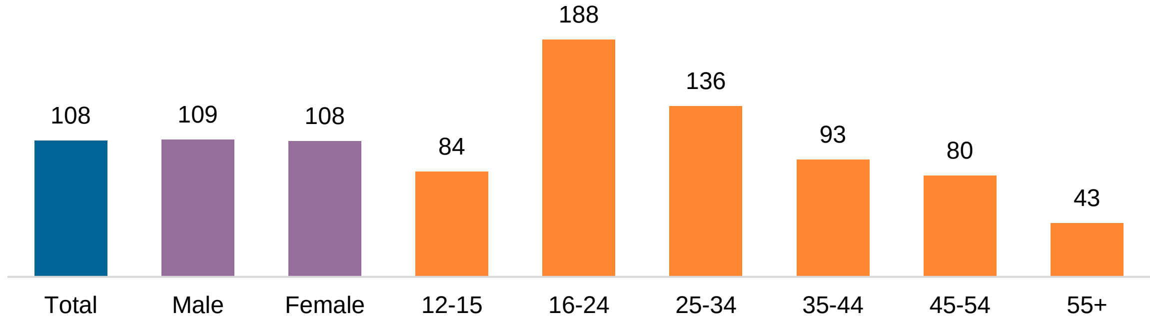




Base: 2,070 (streamed music in the past 3 months)

The amount of time spent streaming in the previous 3 months was spread quite evenly, with the most common responses being 10 hours or less (20%), 51-100 hours (16%), and 101-200 hours (17%).

<u>A12. In the past 3 months how many hours did you spend streaming music through the internet? (Average number of hours)</u>



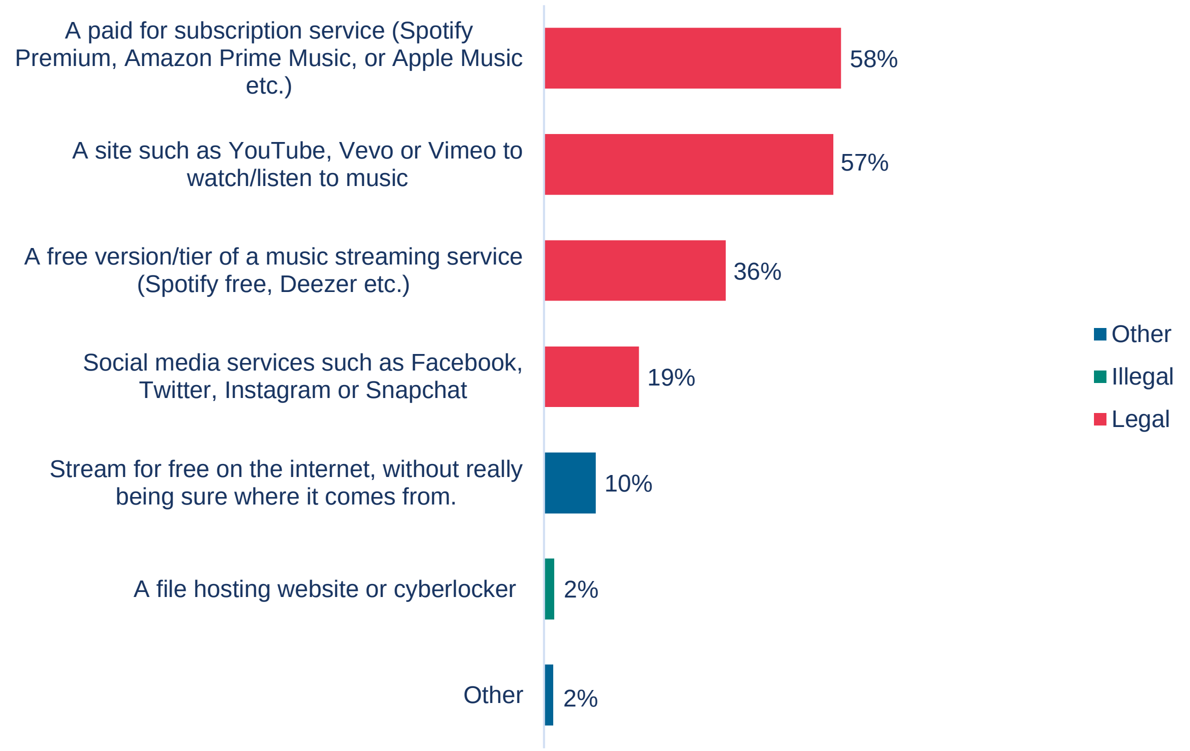
Base: 2,053 (streamed music in the past 3 months)

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 exist and, encouragingly, only a small minority had used these.
- **Encouragingly, the two most commonly selected sources included a paid option**. Over half (58%) had used “a paid for subscription service” (e.g. Spotify Premium, Amazon Prime Music, Apple Music etc.), and/or “a site such as YouTube” (57%).
- Those aged **16-24** were particularly likely to have embraced “a paid subscription” service, with over three quarters (76%) having accessed music in this way.
- Also, a notably higher proportion of those aged 12-15 were using free tiers of streaming service (43%) compared to the average (36%), further suggesting that streaming is **encouraging healthy listening behaviours (i.e. use of legal sources) from an early age**.
- The only **illegal method** tested, a “file hosting website or cyberlocker”, was used by only 2%.
- There was, similarly to music downloading, a certain amount of **ambiguity** among respondents in terms of the source of the music they were streaming. This was most prevalent in those aged 12-15 (16%) and 55+ (18%).

A13. 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.)	58%	59%	54%	76%	67%	58%	52%	36%
A free version/tier of a music streaming service (Spotify free, Deezer etc.)	36%	35%	43%	31%	35%	37%	37%	35%
Social media services such as Facebook, Twitter, Instagram or Snapchat	17%	20%	26%	21%	21%	17%	15%	13%
A file hosting website or cyberlocker	2%	2%	1%	3%	3%	2%	1%	0%
A site such as YouTube, Vevo or Vimeo	57%	57%	56%	67%	60%	54%	51%	51%
Stream for free on the internet, without really being sure where it comes from	10%	10%	16%	5%	7%	9%	9%	18%
Other	2%	2%	0%	1%	2%	1%	2%	4%

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

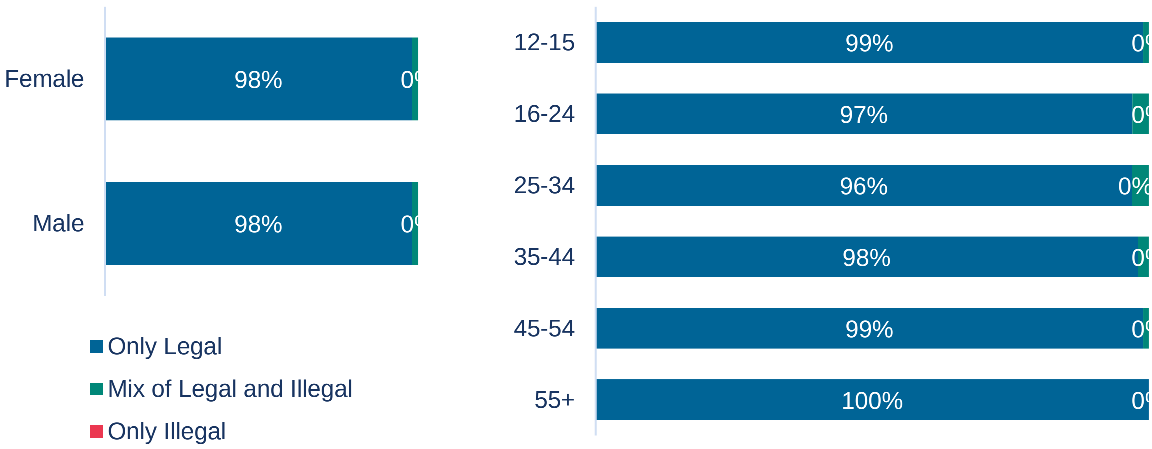
Base: 2,033 (streamed music in the past 3 months from the listed sources, unsure removed)

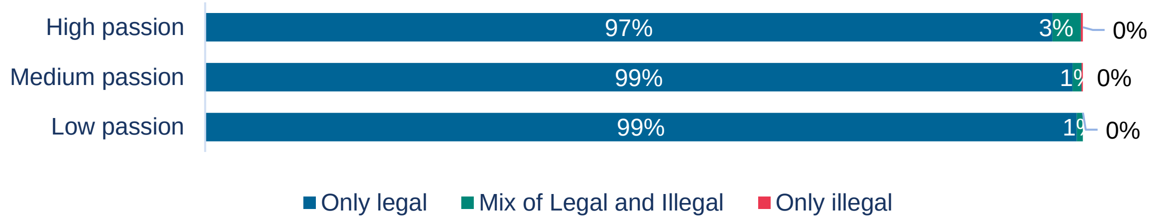
Legality of music streaming

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:
  - 2% had used a mix of legal and illegal sources to stream music.





Base: 2,015 (streamed music in the past 3 months, with those who selected 'other' or 'not sure of source' removed)

A14. And how is your music streaming time typically split across the following sources?

Legality	Source	Average % of usage split	Average number of downloads
Legal	A paid for subscription service (Spotify Premium, Amazon Prime Music, or Apple Music etc.)	54%	59
	A site such as YouTube, Vevo or Vimeo to watch/listen to music	22%	24
	A free version/tier of a music streaming service (Spotify free, Deezer etc.)	15%	16
	Social media services such as Facebook, Twitter, Instagram or Snapchat	4%	5
Illegal	A file hosting website or cyberlocker	1%	1
Other	Stream for free on the internet, without really being sure where it comes from.	2%	3
	Other	1%	1

Base: 2,053 (streamed music in the past 3 months)

Qualitative insights

Qualitative discussions highlighted the correlation between motivations for consuming music online and the benefits of streaming services. Music streaming services were valued for providing a vast library of content for free or within a single subscription. For most, the free options met their basic needs. However, for those who wanted additional benefits, the subscription fee was seen as a relatively low-cost, and a justified, expense. For these reasons, illegal streaming seemed to be less common.

- *"In a typical week I would say I use Spotify quite a lot as it's a free service. It's not often you get anything for free so when something like this is a free service, I am hardly going to say no. I do use YouTube to discover new music, but not as much Spotify. If I had to choose, I would choose Spotify as it's free and I have access to a wide range of music at my fingertips. I can listen to any song or artist wherever I am." - Male, 45-54*

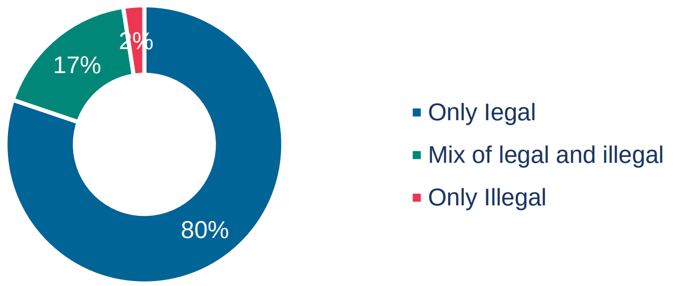
- *"If I could only use one platform it would be YouTube, as I can stream for free, listen in the background, or watch music videos. It's the easiest option for when connected to the internet." - Male, 20-24*

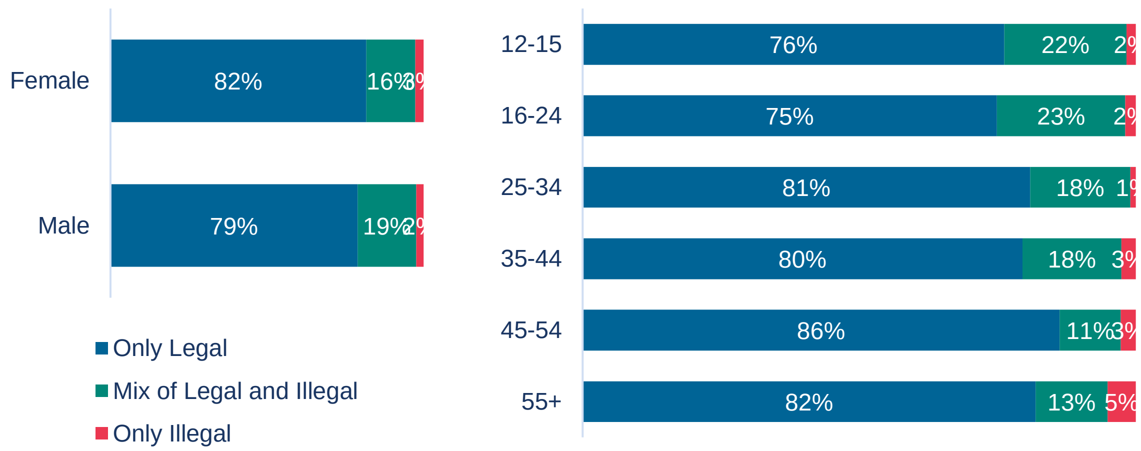
- *"I know that my consumption of illegal music and movie/tv content is virtually zero, and I attribute that to how easy it is to access that kind of material now. Spotify and Netflix/Amazon Prime Video, combined with YouTube, mean I never need to go looking for something because it is available all of the time either for free (legally) or* *at a very reasonable price on a platform which lets me consume as much content as I like.”*

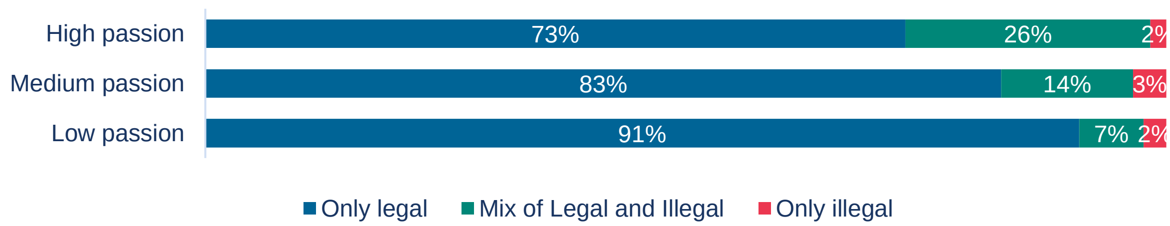
Combined downloading and streaming of music

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:
  - **80%** had consumed music online using legal sources only.
- Illegal:
  - **2%** had used illegal sources only to consume music online.
- Mixed:
  - **17%** 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 (25%) of sources, compared with those with either a medium (14%) or low passion level (7%).







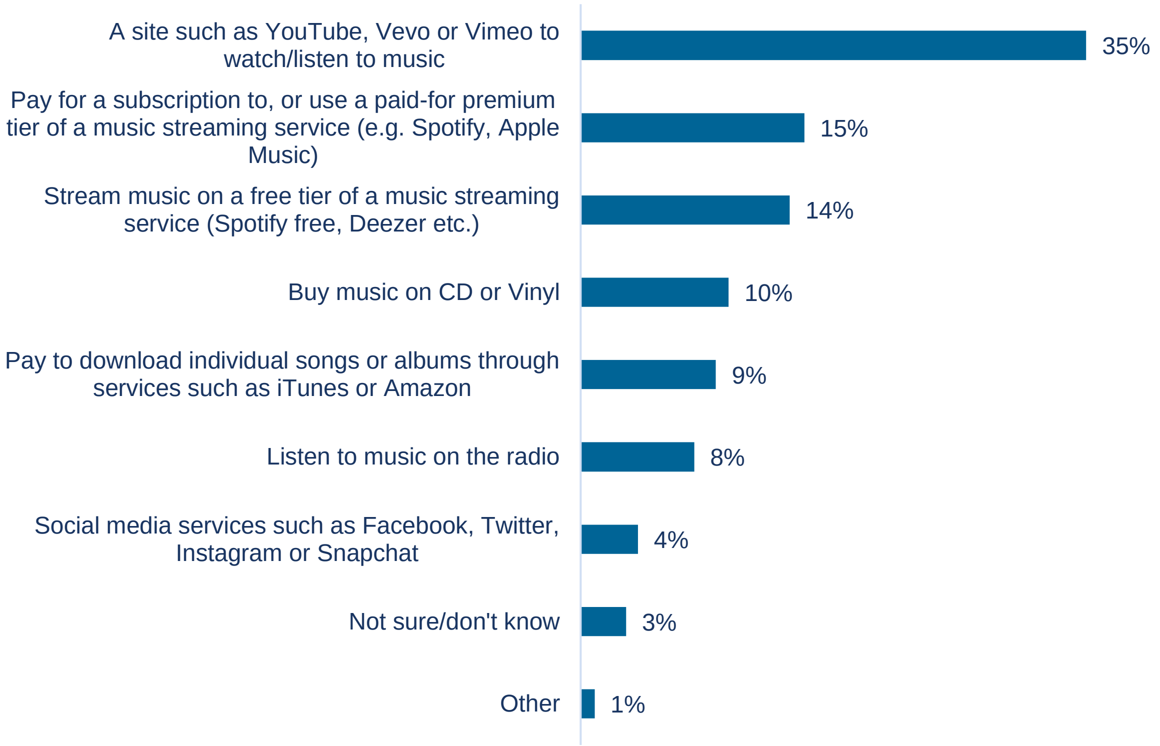
Base: 2,297 (streamed and/or downloaded music from a legal or illegal source, with those who only selected 'not sure of source' removed)

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 35%) 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 (34%) of our sample.

A15. 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+
Pay for a subscription to, or use a paid-for premium tier of a music streaming service (e.g. Spotify, Apple Music)	16%	14%	7%	19%	16%	17%	15%	14%
Stream music on a free tier of a music streaming service (Spotify free, Deezer etc.)	16%	11%	13%	14%	15%	13%	9%	22%
A site such as YouTube, Vevo or Vimeo to watch/listen to music	29%	43%	43%	42%	25%	35%	32%	33%
Pay to download individual songs or albums through services such as iTunes or Amazon	10%	8%	13%	9%	13%	3%	16%	6%
Listen to music on the radio	6%	10%	11%	4%	6%	11%	8%	10%
Social media services such as Facebook, Twitter, Instagram or Snapchat	4%	3%	3%	3%	9%	4%	0%	0%

Buy music on CD or Vinyl	11%	9%	7%	7%	11%	12%	15%	11%
Other	2%	0%	0%	1%	2%	0%	2%	0%
Not sure/don't know	5%	1%	3%	0%	4%	5%	3%	4%

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

Base: 412 (downloaded and/or streamed music illegally)

Qualitative insights

Qualitative insights suggest that the lower selection of paid alternatives may be owing to price sensitivity. Most said that they had developed a budget for music based on their current use of sources and, therefore, any new ones adopted would need to be free. As such, free streaming services were seen as the most attractive by some way.

- *"My go-to [source] would be a torrent site (probably the piratebay first), as there is a good amount of music available, and it's easy to find/download. If the piratebay got shut down I would not be happy, as it is a good source of high-quality uploads. I would first try another torrent site. If torrent sites no longer existed, I would use a YouTube converter instead (I use 4kdownloads YouTube to mp3 converter, but I know of many others) because most music is available to watch for free on YouTube and this becomes the easiest way to listen to music for free without staying on YouTube while doing so. **If I could no longer use YouTube converters, I would have to switch to the various free streaming options (like Soundcloud, Spotify, YouTube, Tunein radio)**. If all of the free options became no longer available this would make me consume less content. I would still buy the same amount but removing free alternatives would not make me purchase more. It would simply make me listen to less music. I would be limited to music I have already downloaded." – Male, 20-24*

- *"If I no longer had access to it [a 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] I would feel absolutely sad. There is not a lot I could do if it's not available to use. Guess I would just use Spotify more (as in listening on the free version). I would consume the same content nothing more or nothing less." - Male, 45-54*

- *"If only legal methods were available, I would probably switch to using YouTube, free streaming like Spotify and a radio app like TuneIn radio. I would use Spotify/TuneIn when I'm not that bothered about what I want to listen to (if I just wanted some music to be on in the background). When I want to access specific songs, I would go straight to YouTube, and simply minimise the screen if not interested in watching the video. I would probably spend a bit less time listening to music online, as the free methods aren't as efficient for having a full collection of music I like for playing in the background. It's not possible to create a playlist on YouTube for music to shuffle, for example. It would not make me spend any more money. I can only buy what I can afford after all." - Male, 20-24*

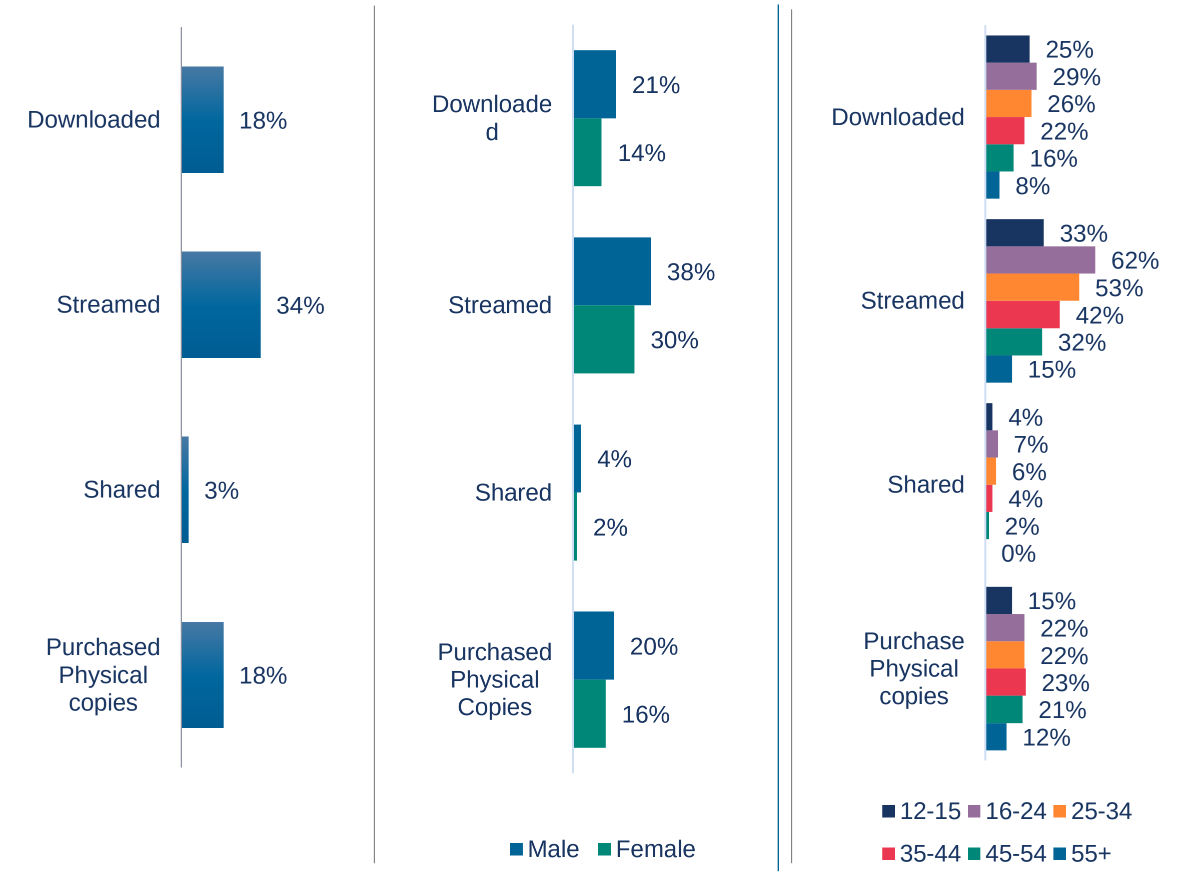
Film

Engaging with film

46% 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 common method of accessing films**, with 34% having done so. It was even higher among those aged 16-34 when compared to older or younger age groups.
- Interestingly, the proportion who had **downloaded films or purchased physical** copies was similar (both 18% respectively).

B1. Have you downloaded/streamed/shared[7]/purchased physical copies of full-length films in the past 3 months?



Base: 2019 n = 5,014 (total sample)

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.

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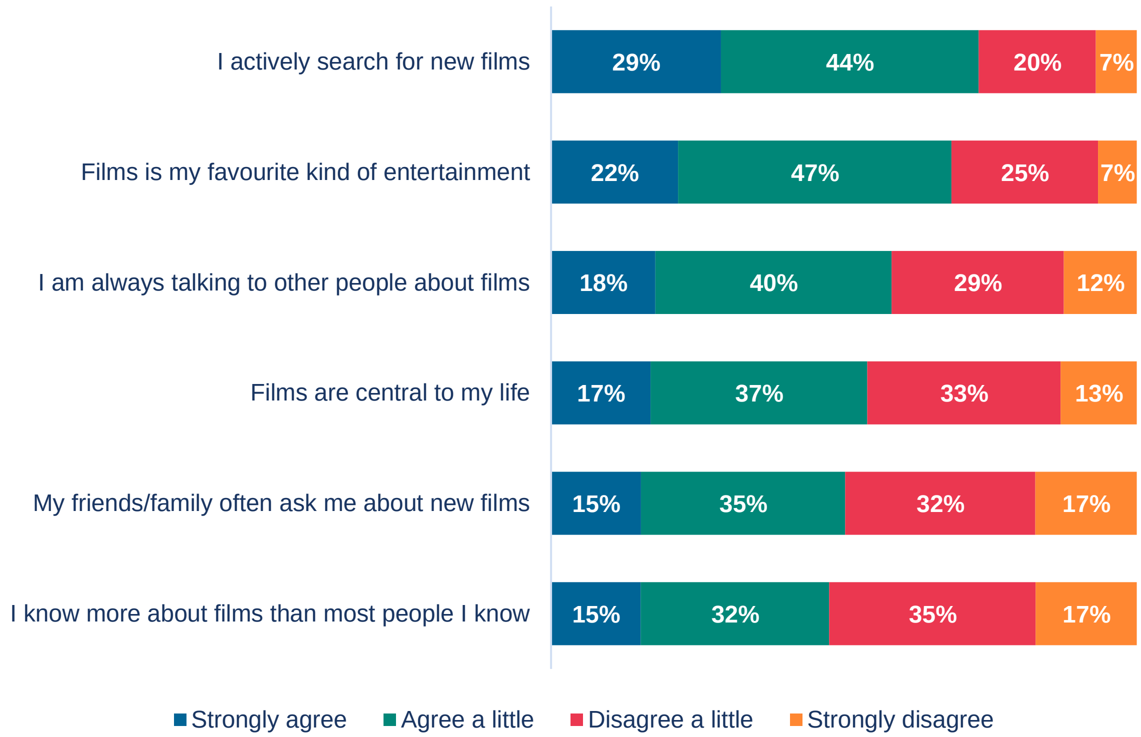
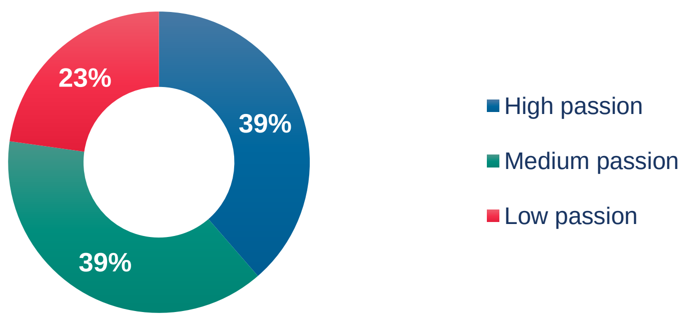
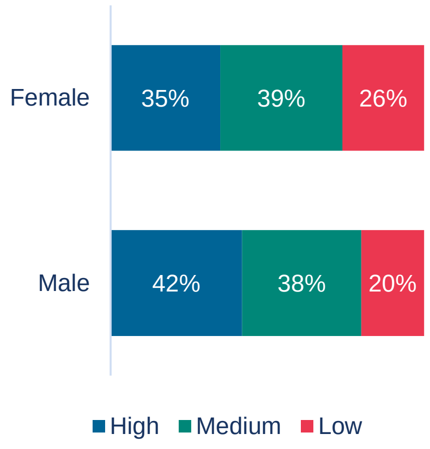
[7] The definition of 'shared' given was: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in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

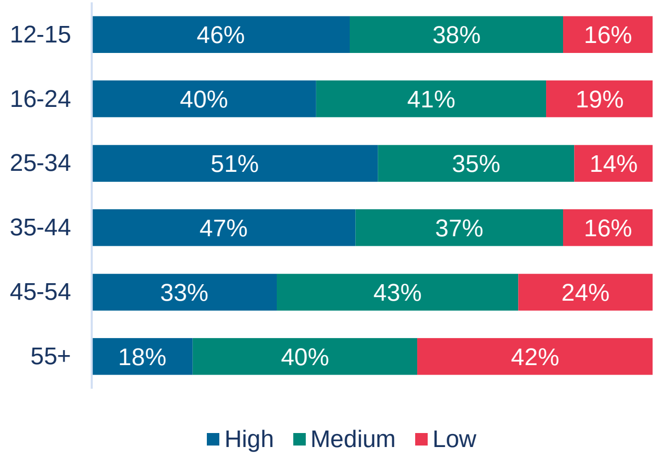
- Four in ten (39%) displayed **high levels of passion for film.** This was most evident in those aged 25-34 (51%) and tended to steadily decline with age (e.g. 18% of those aged 55+ were in the High category).
- When looking at individual statements, **discovery** emerged as a key factor. The most agreed with statement overall (73%) was "I actively search for new films".

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









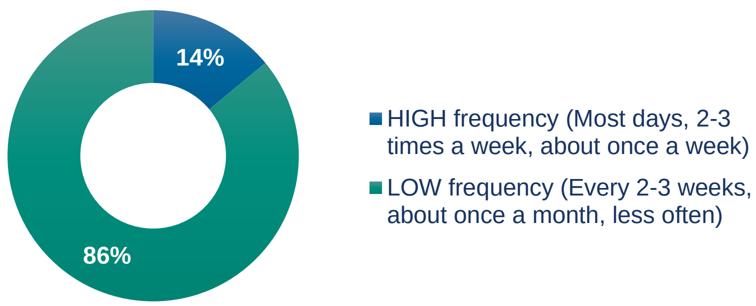
Base: 2,341 (downloaded, streamed, shared and/or purchased physical copies of films in the past 3 months)

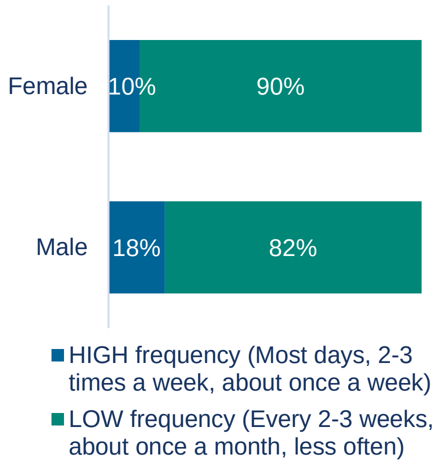
Physical purchasing of films

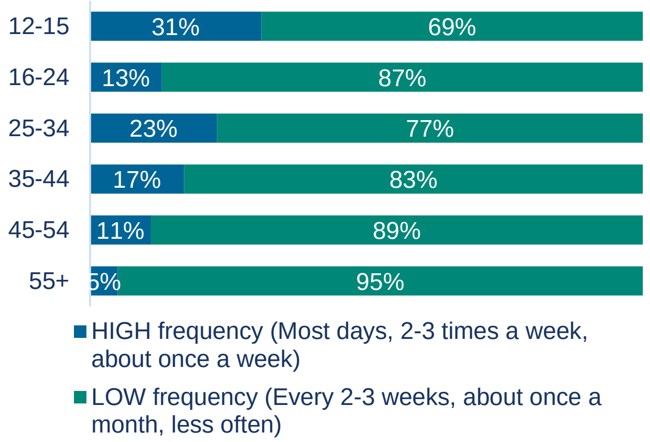
Respondents were asked about purchasing films in physical formats, focusing on frequency and number of purchases made.

- Only a minority (14%) were frequent purchasers of films in physical formats.
- On average, respondents purchased 7 films in physical formats over a 3-month period.
- Interestingly, the youngest age group (12-15) and 25-34-year olds were the most engaged with physical formats, purchasing slightly more products and more frequently. It is important to note that the small sample size for those aged 12-15 (N=60) means that these results should be viewed with caution.

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

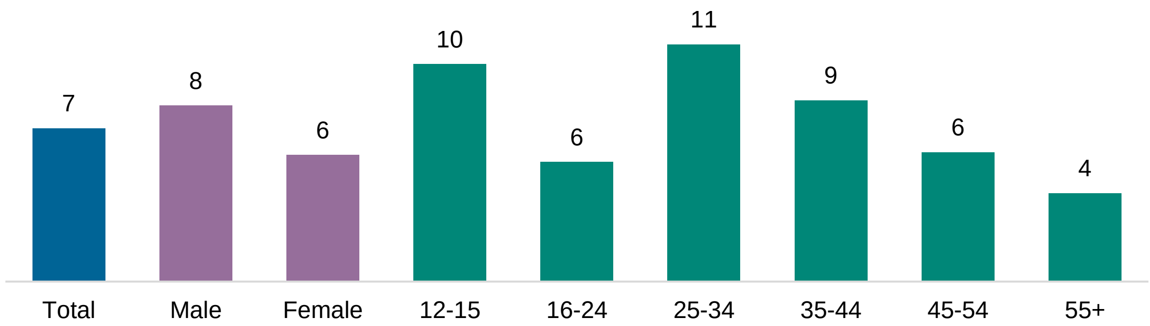






Base: 917 (purchased physical copies of film in the past 3 months)

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



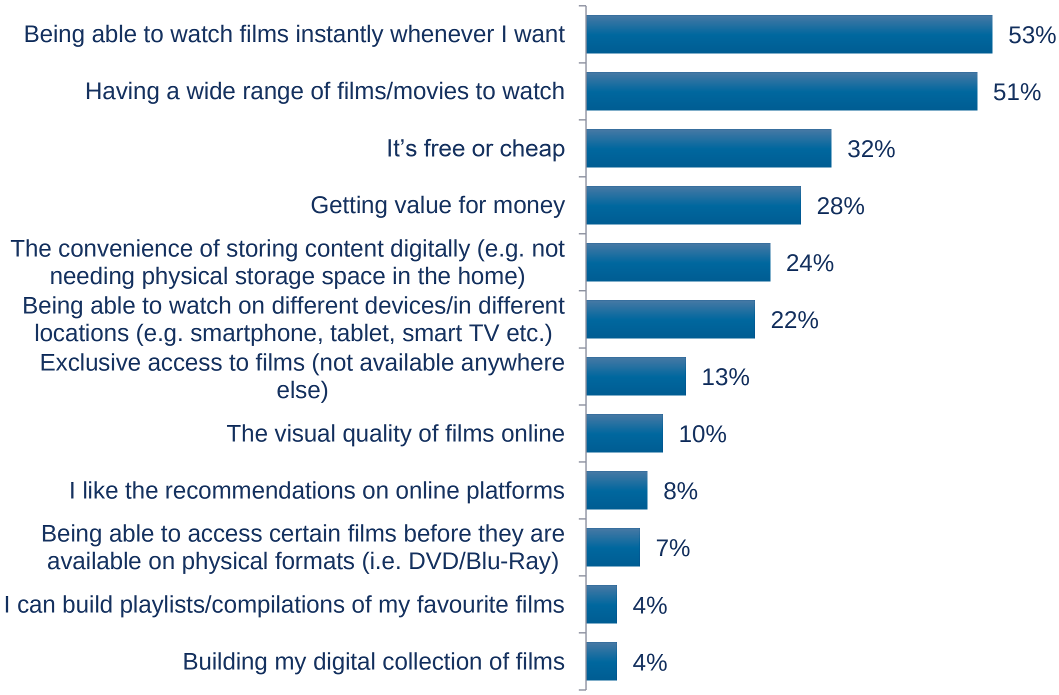
Base: 799 (purchased physical copies of films in the past 3 months)

Understanding online consumption of films

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 **ease of access** (53% "being able to watch films instantly whenever I want") and the **range of options** available (51% "having a wide range of films/movies to watch"). 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 "free or cheap" (32%) or for "value for money" (28%).
- Other factors that were mentioned by approximately a quarter were the "**convenience** of storing content digitally" (24%) and the **portability** of content, in terms of devices and locations (22%).

<u>B5. What are the main reasons that you choose to access film online (i.e. downloading or streaming)? Please select your top 3. (%)</u>



Base: 1,959 (downloaded or streamed films online in the past 3 months)

Male respondents	Female respondents
1. Being able to watch films instantly whenever I want (50%) 2. Having a wide range of films/movies to watch (49%) 3. It's free or cheap (34%)	1. Being able to watch films instantly whenever I want (58%) 2. Having a wide range of films/movies to watch (53%) 3. It's free or cheap (29%)
Aged 12-15	**Aged 16-24**
1. Being able to watch films instantly whenever I want (49%) 2. Having a wide range of films/movies to watch (43%) 3. Being able to watch on different devices/in different locations (e.g. smartphone, tablet, smart TV etc.) (33%)	1. Being able to watch films instantly whenever I want (54%) 2. Having a wide range of films/movies to watch (52%) 3. It's free or cheap (34%)
Aged 25-34	**Aged 35-44**
1. Having a wide range of films/movies to watch (50%) 2. Being able to watch films instantly whenever I want (47%) 3. It's free or cheap (32%)	1. Being able to watch films instantly whenever I want (54%) 2. Having a wide range of films/movies to watch (51%) 3. Getting value for money (30%)
Aged 45-54	**Aged 55+**
1. Being able to watch films instantly whenever I want (60%) 2. Having a wide range of films/movies to watch (54%) 3. Getting value for money (30%)	1. Being able to watch films instantly whenever I want (59%) 2. Having a wide range of films/movies to watch (51%) 3. It's free or cheap (38%)

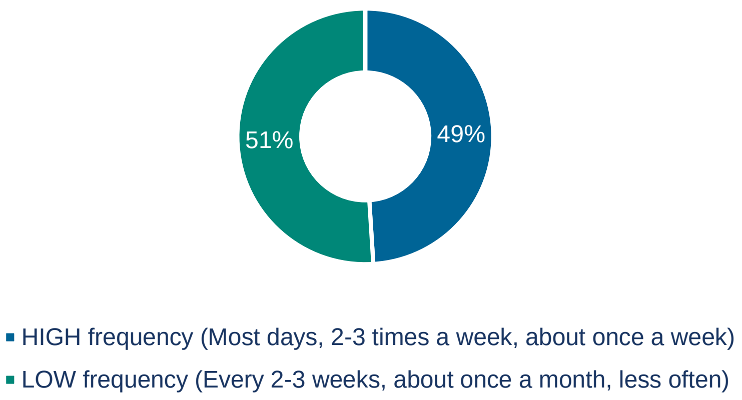
Downloading films

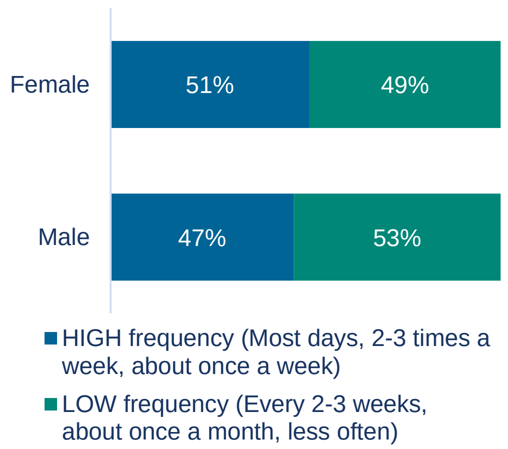
The 18% who had downloaded films during the previous 3 months were asked more questions around frequency, volume and sources used.

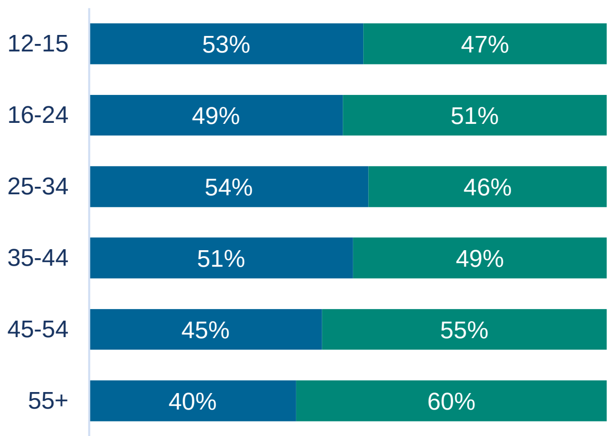
Frequency and volume of downloading films

- Half (49%) of those who downloaded films did so frequently (i.e. at least once a week). The proportion downloading weekly was **fairly consistent across ages**, although slightly lower for the oldest group (40% among 55+).
- Respondents downloaded, on average, 17 films every 3 months. While consistent across most age groups, volume of downloading was notably higher among **25-34**-year olds (23 films every 3 months).

B6. Generally, how often do you download (full-length) films through the internet? (%)

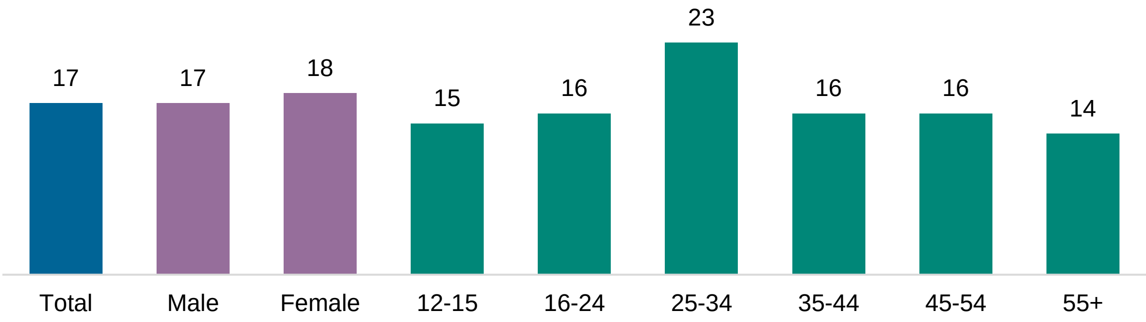






Base: 913 (downloaded films in the past 3 months)

B7. In the past 3 months how many full-length films did you download through the internet? (average number of downloads)



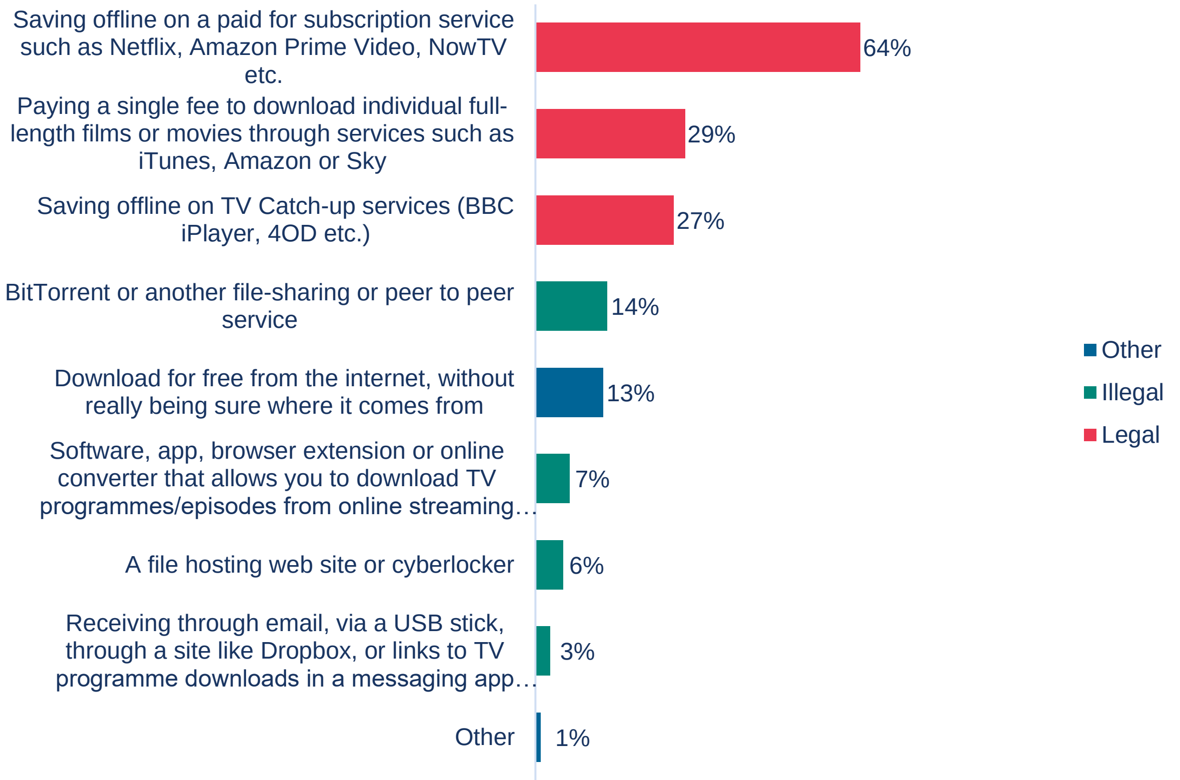
Base: 1,613 (downloaded films in the past 3 months)

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 (64%) of all film downloaders. This was followed by three in ten who were "Paying a single fee to download individual full-length films or movies" (29%) and/or "Saving offline on TV catch-up services" (27%).
- The most common illegal method was using **BitTorrent or another file-sharing peer to peer service** (14%). Other than this, no illegal method was selected by more than 7%.
- A **notable proportion were unsure** of exactly where they were downloading or receiving downloads from. This was most evident among the oldest respondents (20% of those aged 55+).

B8. 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 on a paid for subscription service such as Netflix, Amazon Prime Video, NowTV etc.	57%	74%	60%	77%	66%	63%	65%	50%
Paying a single fee to download individual full-length films or movies through services such as iTunes, Amazon or Sky	30%	29%	24%	22%	35%	35%	38%	20%
Saving offline on TV Catch-up services (BBC iPlayer, 4OD etc.)	27%	28%	26%	22%	25%	30%	28%	32%
BitTorrent or another file-sharing or peer to peer service	16%	11%	7%	19%	17%	18%	8%	12%
Download for free from the internet, without really being sure where it comes from	15%	11%	17%	14%	14%	7%	10%	20%
Software, app, browser extension or online converter that allows you to download TV programmes/episodes from online streaming websites such as YouTube or similar sites	8%	5%	12%	6%	6%	9%	3%	6%
A file hosting web site or cyberlocker	6%	5%	7%	11%	7%	5%	1%	3%
Receiving through email, via a USB stick, through a site like Dropbox, or links to TV programme downloads in a messaging app (WhatsApp etc.) social media or on a forum online	4%	2%	4%	4%	4%	3%	2%	1%
Other	1%	1%	0%	0%	1%	2%	1%	2%

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

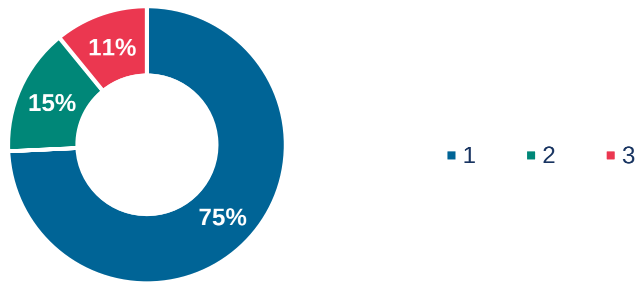
Base: 913 (downloaded films during the past 3 months)

Legality of film downloads

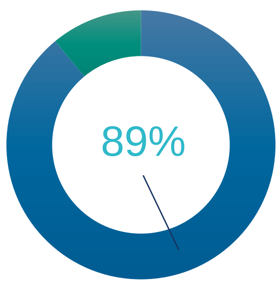
To better understand the distribution of sources across legal and illegal categories, those who had downloaded films in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

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.

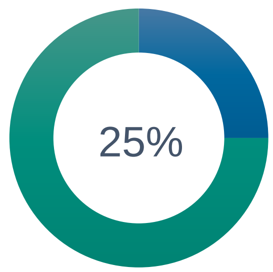
- Legal Sources:
  - Overall 89% had used at least one legal source to download films.
  - The highest proportion, by some way **(75%), had used only legal sources**.
  - Those aged 45-54 were most likely (86%) to have used only legal sources.
- Illegal Sources:
  - **25% had used at least one illegal source** to download films.
  - 11% had used only illegal sources to download films.
- Mixed:
  - 15% had used a mix of legal and illegal sources.
  - Use of a mix of legal and illegal sources was slightly higher among those aged 16-24 and 25-34 (19% respectively).

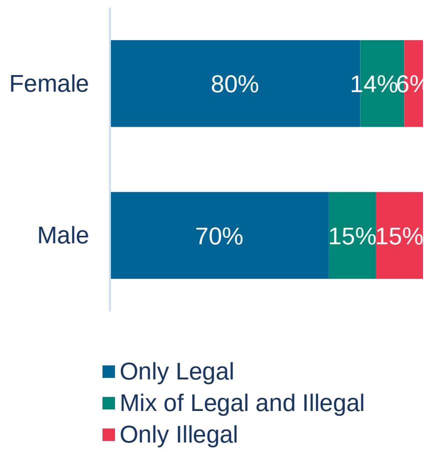


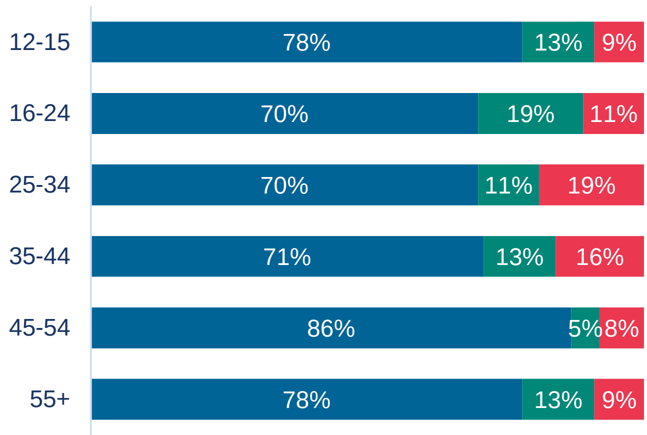
Any legal

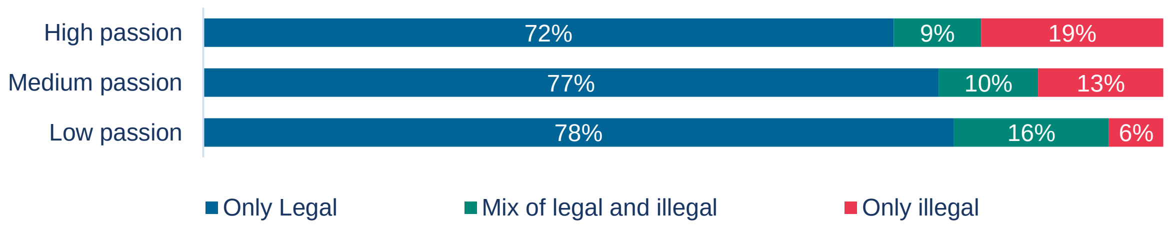


Any illegal









Base: 859 (downloaded films in the past 3 months, with those who selected 'other' or 'not sure of source' removed).

B9. 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' on a paid for subscription service such as Netflix, Amazon Prime Video, NowTV etc.	50%	10
	Paying a single fee to download individual full-length films or movies through services such as iTunes, Amazon or Sky	16%	2
	Saving offline on TV Catch-up services (BBC iPlayer, 4OD etc.)	11%	1
Illegal	BitTorrent or another file-sharing or peer to peer service	8%	0
	Software, app, browser extension or online converter that allows you to download full-length films from online streaming websites such as YouTube or similar	3%	1
	A file hosting web site or cyberlocker	3%	0
	Receiving through email, via a USB stick, through a site like Dropbox, or links to downloads in a messaging app (WhatsApp etc.), via social media or on a forum online	1%	0
Other	Download for free from the internet, without really being sure where it comes from	8%	1
	Other	1%	0

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

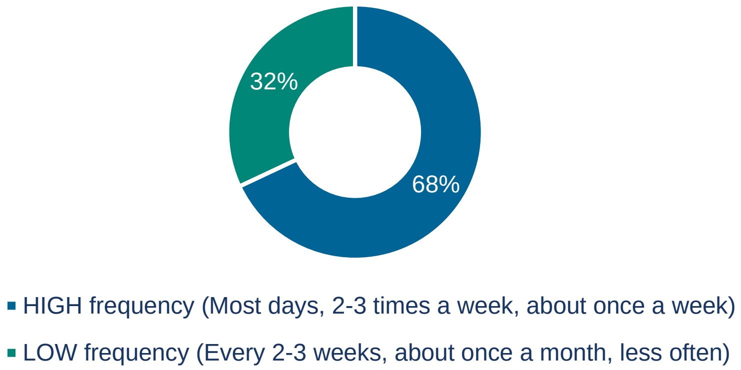
Streaming films

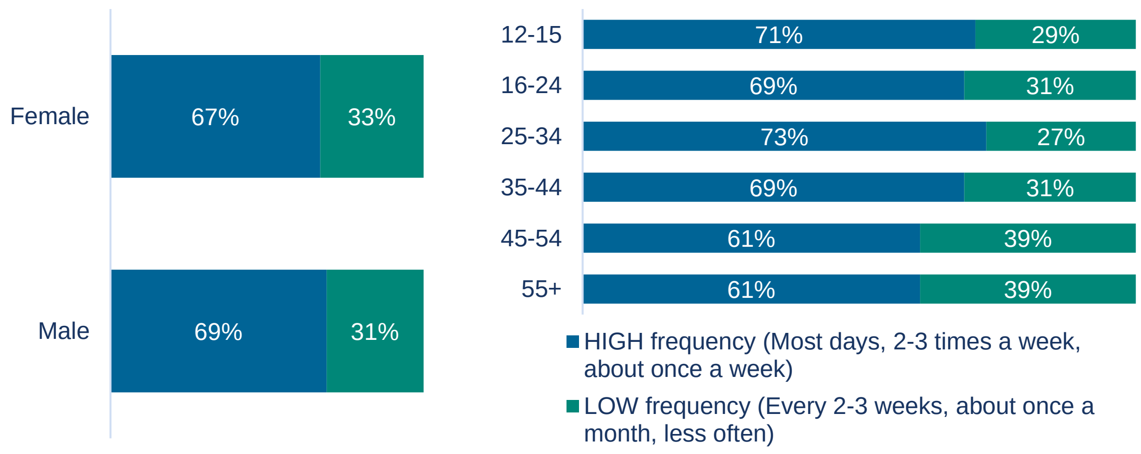
The 34% who had streamed films during the previous 3 months were asked questions around frequency, volume and sources used.

Frequency and volume of streaming films

- **Approximately two thirds (68%) were frequent streamers of films**, doing so weekly. This was also notably higher than the proportion who were frequent downloaders of films within the same time period (49%).
- Interestingly, frequency of streaming was generally consistent among all age groups.
- However, **those aged 16-34** were likely to spend more time streaming films. On average, they did so for between 74-79 hours every 3 months with no other age group spending more than 57 hours.

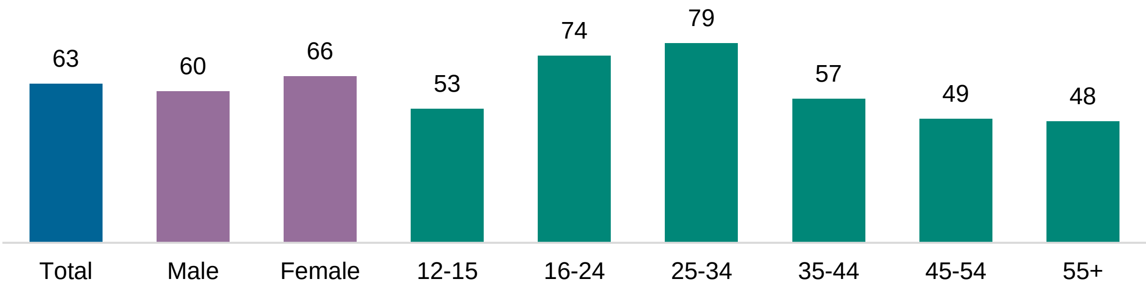
B10. Generally, how often do you stream full-length films through the internet? (%)





Base: 1,744 (streamed full-length films in the past 3 months)

<u>B11. In the past 3 months how many hours did you spend streaming full-length films through the internet? (Average number of hours)</u>



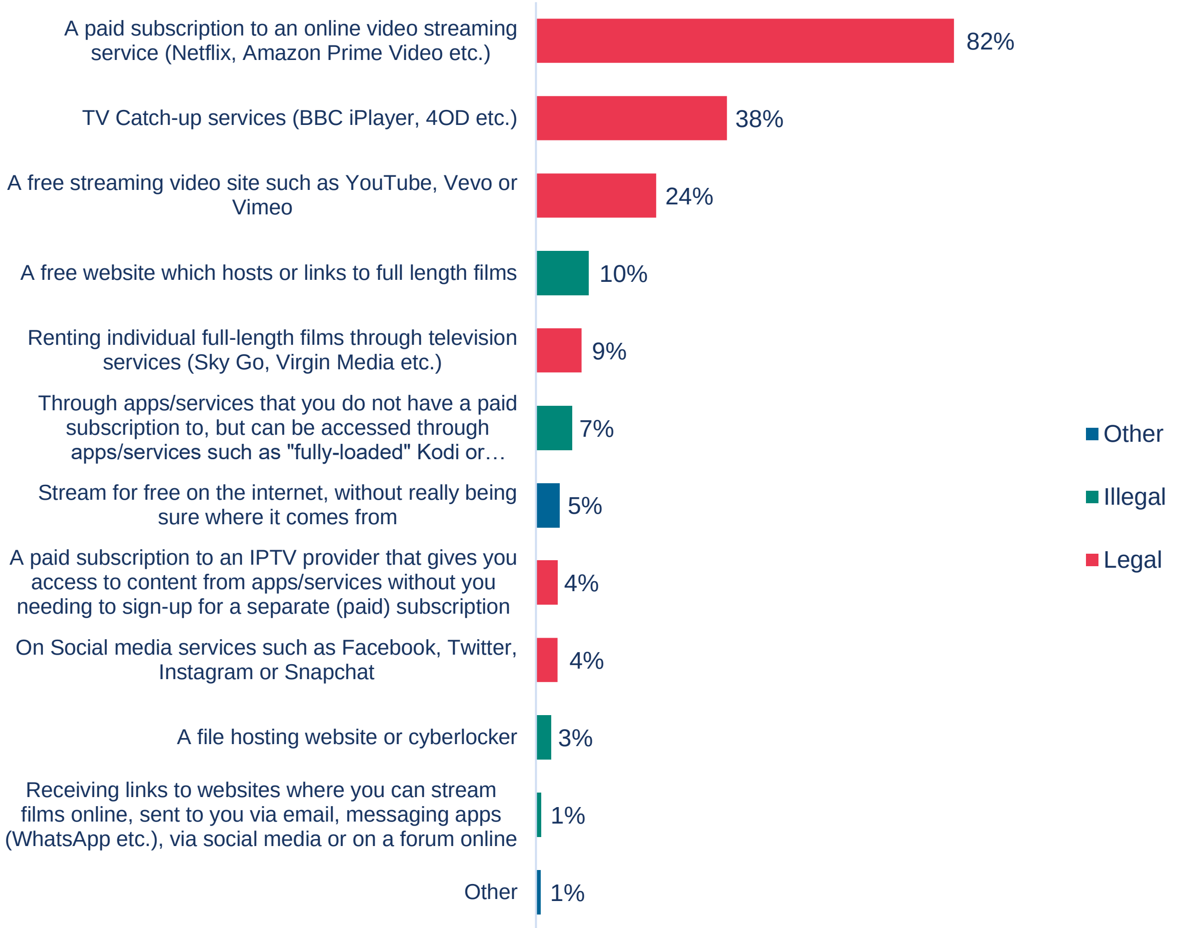
Base: 1,709 (streamed films in the past 3 months)

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: **82% used a “paid subscription to an online video streaming service”**. This was followed by “TV Catch-up services” (38%) and “a free streaming video site such as YouTube” (24%).
- **No single illegal sources was used by more than 10%** of film streamers. Of these, free websites hosting links to films (10%) and Kodi style boxes (7%) were the most common. There were few differences across age groups, although 16-24 were more likely to have used free websites hosting links to films (20%).

B12. 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 (Netflix, Amazon Prime Video etc.)	82%	83%	79%	89%	86%	80%	79%	76%
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	5%	4%	8%	3%	6%	6%	3%	2%
On Social media services such as Facebook, Twitter, Instagram or Snapchat	4%	4%	11%	4%	4%	6%	2%	2%
A free streaming video site such as YouTube, Vevo or Vimeo	24%	23%	29%	24%	25%	25%	18%	23%
A file hosting website or cyberlocker	4%	2%	3%	5%	4%	2%	2%	1%
TV Catch-up services (BBC iPlayer, 4OD etc.)	37%	38%	28%	34%	35%	35%	42%	50%
Renting individual full-length films through television services (Sky Go, Virgin Media etc.)	8%	10%	12%	6%	7%	13%	12%	7%
A free website which hosts or links to full-length films	11%	10%	8%	20%	11%	8%	4%	7%

	Male	Female	12-15	16-24	25-34	35-44	45-54	55+
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 on an adapted set-up box, your Smart TV, mobile devices or entertainment sticks such as the Amazon Fire Stick or the Google Chromecast.	6%	8%	9%	6%	8%	7%	6%	8%
Stream for free on the internet, without really being sure where it comes from	5%	4%	4%	6%	6%	3%	3%	4%
Receiving links to websites where you can stream films online, sent to you via email, messaging apps (WhatsApp etc.), via social media or on a forum online	1%	1%	1%	1%	1%	2%	0%	1%
Other	1%	1%	0%	0%	0%	2%	2%	1%

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

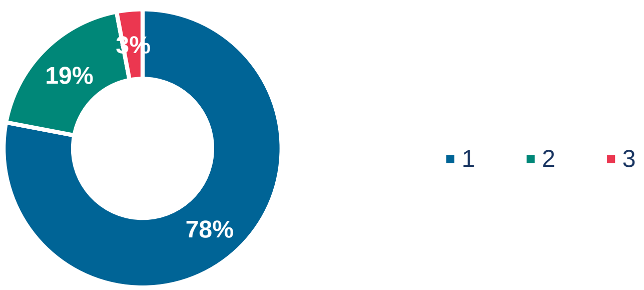
Base: 1,744 (streamed films in the past 3 months from the listed sources, unsure removed)

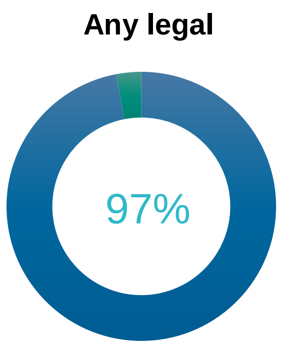
Legality of film streaming

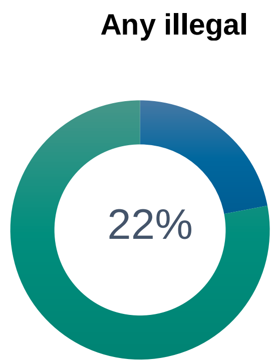
To better understand the distribution of sources across legal and illegal categories, those who had streamed films in the previous 3 months were grouped into the following (mutually exclusive) categories: using only legal sources, only illegal sources or a mix of the two.

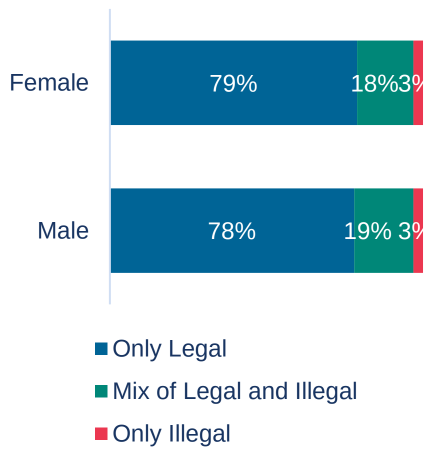
The answer option "stream for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

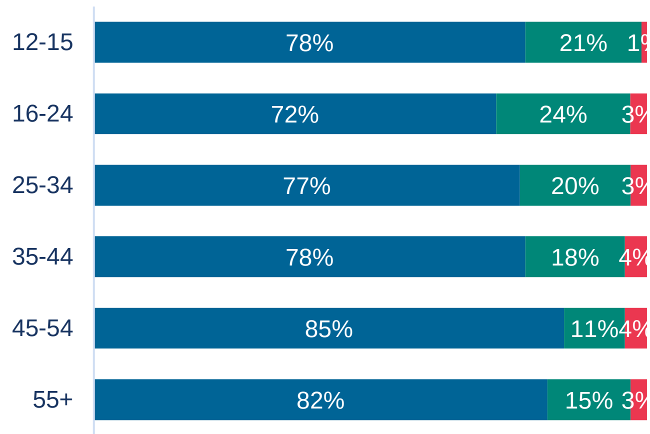
- Legal:
  - 97% had used a legal source to stream films.
  - **78% had used only legal sources** to stream films.
- Illegal:
  - 3% had used only illegal sources to stream films.
  - **22% had used an illegal source** to stream films.
- Mixed:
  - 19% used a mix of legal and illegal sources to stream films.

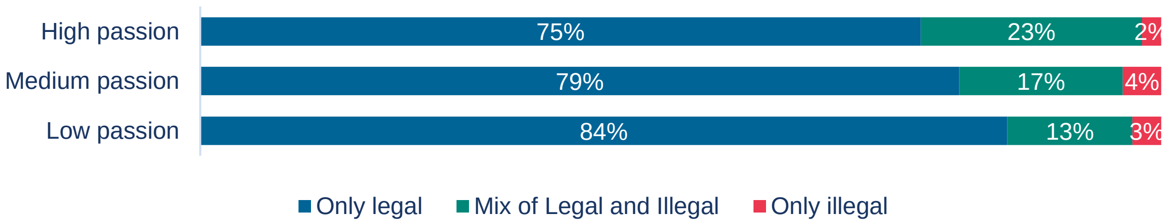












Base: 1,719 (streamed films in the past 3 months, with those who selected 'other' or 'not sure of source' removed)

B13. 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 (Netflix, Amazon Prime Video etc.)	66%	45
	TV Catch-up services (BBC iPlayer, 4OD etc.)	12%	5
	A free streaming video site such as YouTube, Vevo or Vimeo	7%	5
	Renting individual full-length films through television services (Sky Go, Virgin Media etc.)	3%	1
	On Social media services such as Facebook, Twitter, Instagram or Snapchat	1%	1
Illegal	A free website which hosts or links to full-length films	3%	2

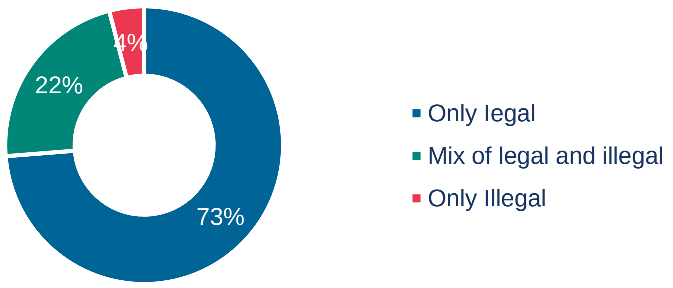
	Through apps/services that you do not have a paid subscription to but can be accessed through apps/services such as "fully-loaded" Kodi or Showbox on an adapted set-up box, your Smart TV, mobile devices or entertainment sticks such as the Amazon Fire Stick or the Google Chromecast.	3%	1
	A paid subscription to an IPTV provider that gives you access to content from apps/services without you needing to sign-up for a separate (paid) subscription	2%	1
	A file hosting website or cyberlocker	1%	1
	Receiving links to websites where you can stream films online, sent to you via email, messaging apps (WhatsApp etc.), via social media or on a forum online	0%	0
Other	Stream for free on the internet, without really being sure where it comes from	2%	1
	Other	1%	0

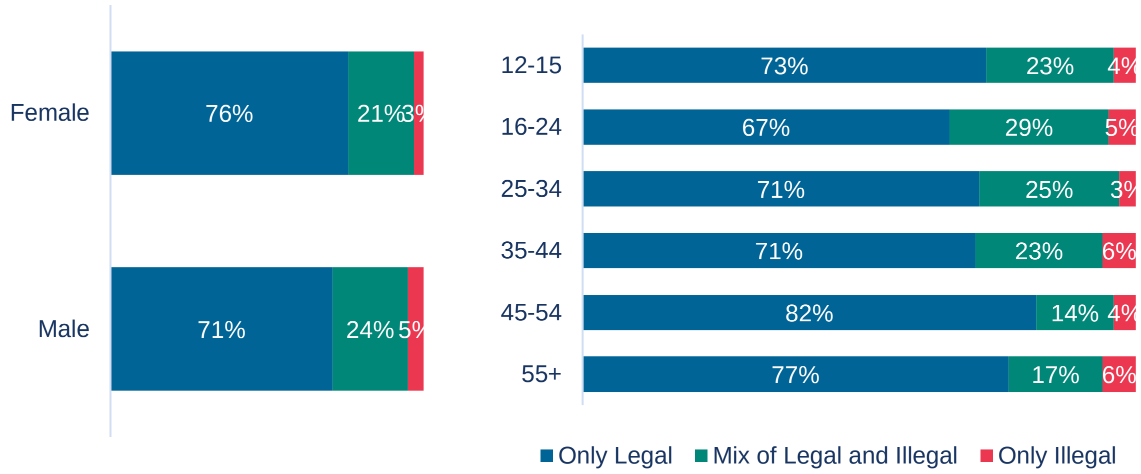
Base: 1,744 (streamed films in the past 3 months)

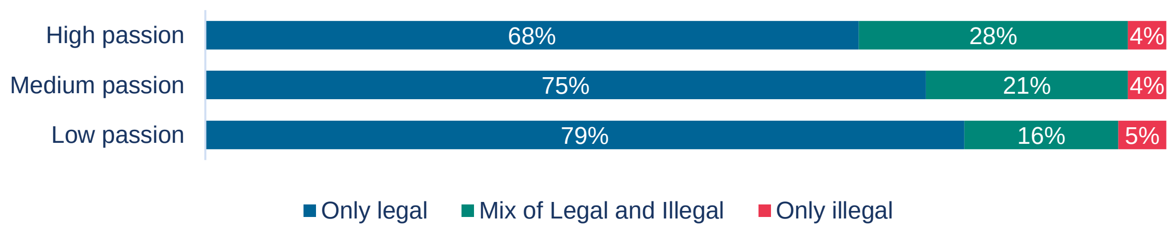
Combined downloading and streaming of films

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

- Only Legal:
  - Nearly **three-quarters (73%)** consumed films online using only legal sources.
  - This was highest among those aged 45-54 (82%) and lowest among those aged 16-24 (67%).
- Only Illegal:
  - 4% used only illegal sources to consume films online.
- Mixed:
  - 22% used a mix of legal and illegal sources to consume films online.
  - This was slightly more common among those aged 16-24 (29%).







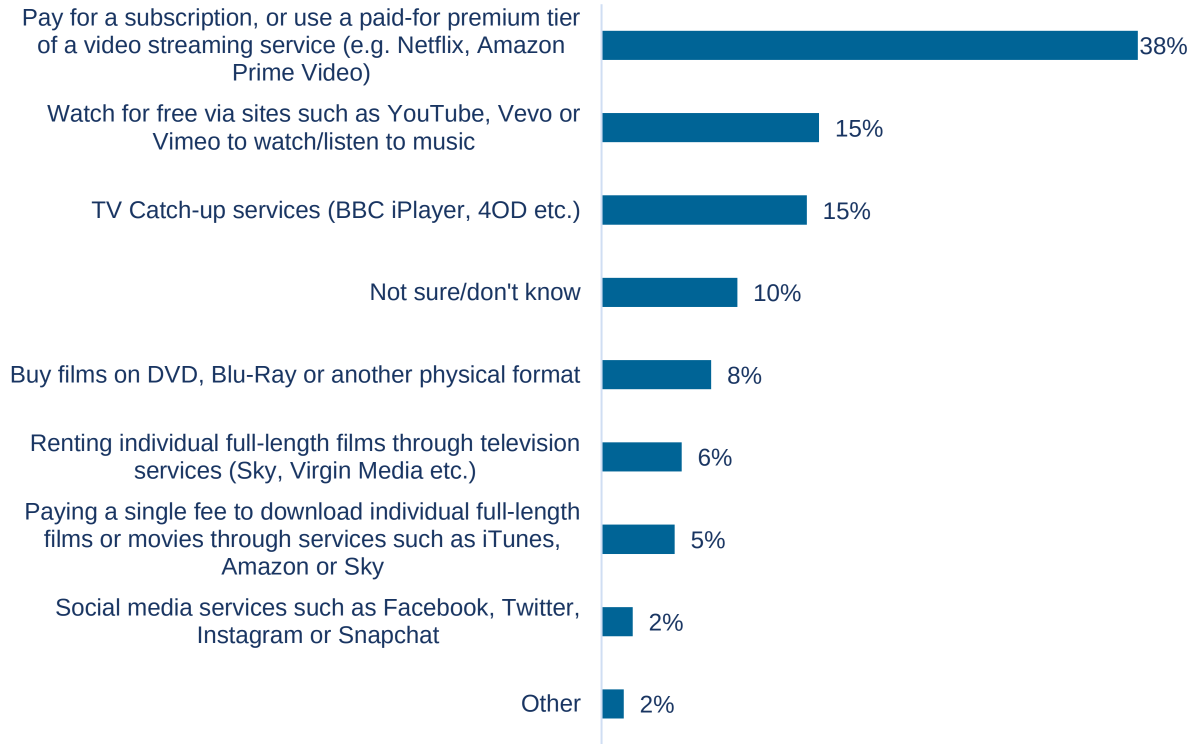
Base: 1,922 (streamed and/or downloaded films from a legal or illegal source, with those who only selected 'not sure of source' removed)

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 (38%) 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 15%, 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 15% respectively.

B14. 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, or use a paid-for premium tier of a video streaming service (e.g. Netflix, Amazon Prime Video)	35%	42%	28%	50%	41%	37%	27%	28%
Watch for free via site such as YouTube, Vevo or Vimeo	14%	18%	25%	14%	15%	19%	10%	12%
Paying a single fee to download individual full-length films or movies through services such as iTunes, Amazon or Sky	6%	4%	4%	4%	7%	5%	5%	5%
Social media services such as Facebook, Twitter, Instagram or Snapchat	2%	2%	5%	2%	1%	3%	4%	1%
TV Catch-up services (BBC iPlayer, 4OD etc.)	16%	13%	18%	5%	14%	9%	27%	28%
Renting individual full-length films through television services (Sky, Virgin Media etc.)	5%	7%	7%	5%	6%	7%	6%	4%
Buy films on DVD, Blu-Ray or another physical format	9%	6%	4%	10%	7%	9%	6%	8%
Other	2%	1%	0%	2%	2%	0%	0%	4%
Not sure/don't know	12%	6%	9%	8%	8%	10%	16%	9%

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

Base: 518 (streamed and/or downloaded films illegally)

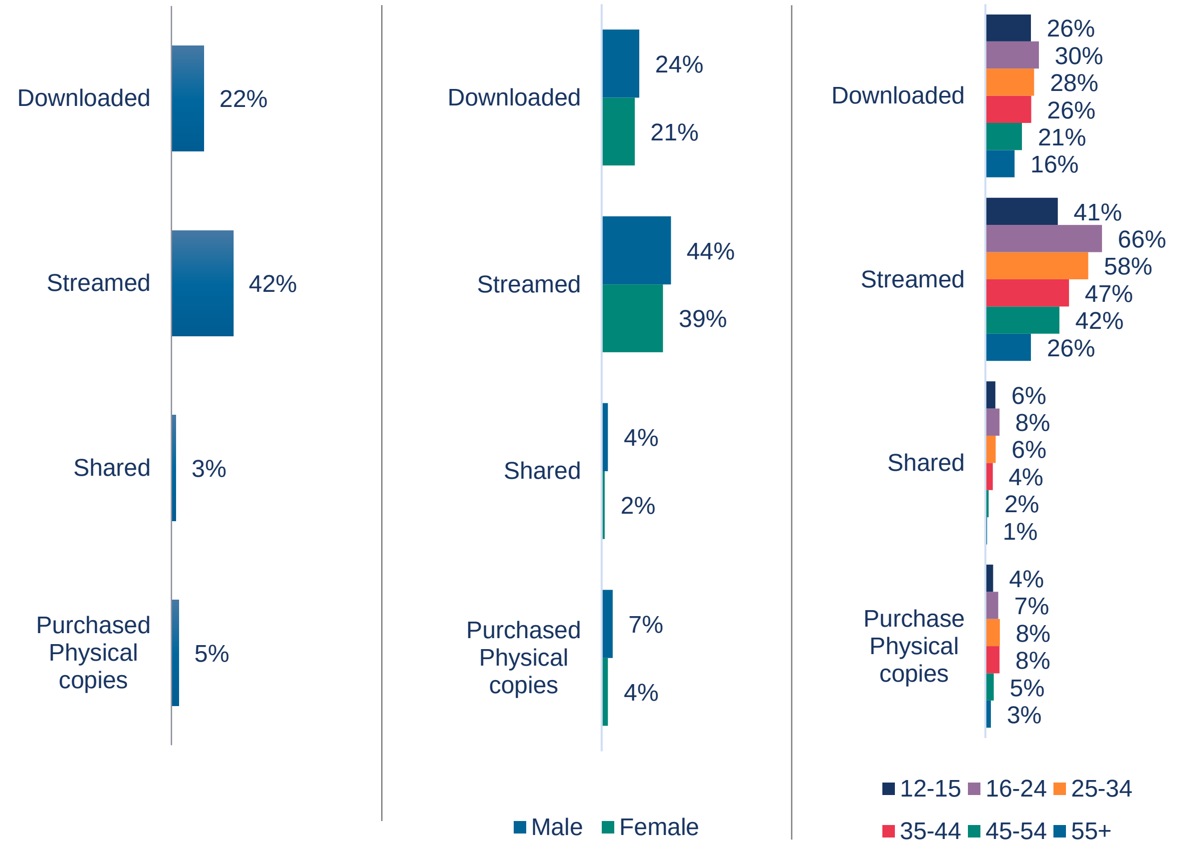
TV Programmes/Series

Engaging with TV programmes/series

49% had engaged with TV programmes/series in the previous 3 months (i.e. either by downloading, streaming, sharing or purchasing physical products).

- **Streaming was the most common** method of accessing TV programmes/series, by some way, with 42% having done so. It was even higher among those aged 16-34 when compared to older or younger age groups.
- Approximately a quarter (22%) had downloaded TV programmes/series, while very few had purchased physical products (5%).

C1. Have you downloaded/streamed/shared[8]/purchased physical copies of TV programmes/series in the past 3 months?



Base: 2019 n = 5,014 (total sample)

To get a broader sense of **their passion for TV**, 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**. This was most evident in those aged 16-44, where approximately half scored High.

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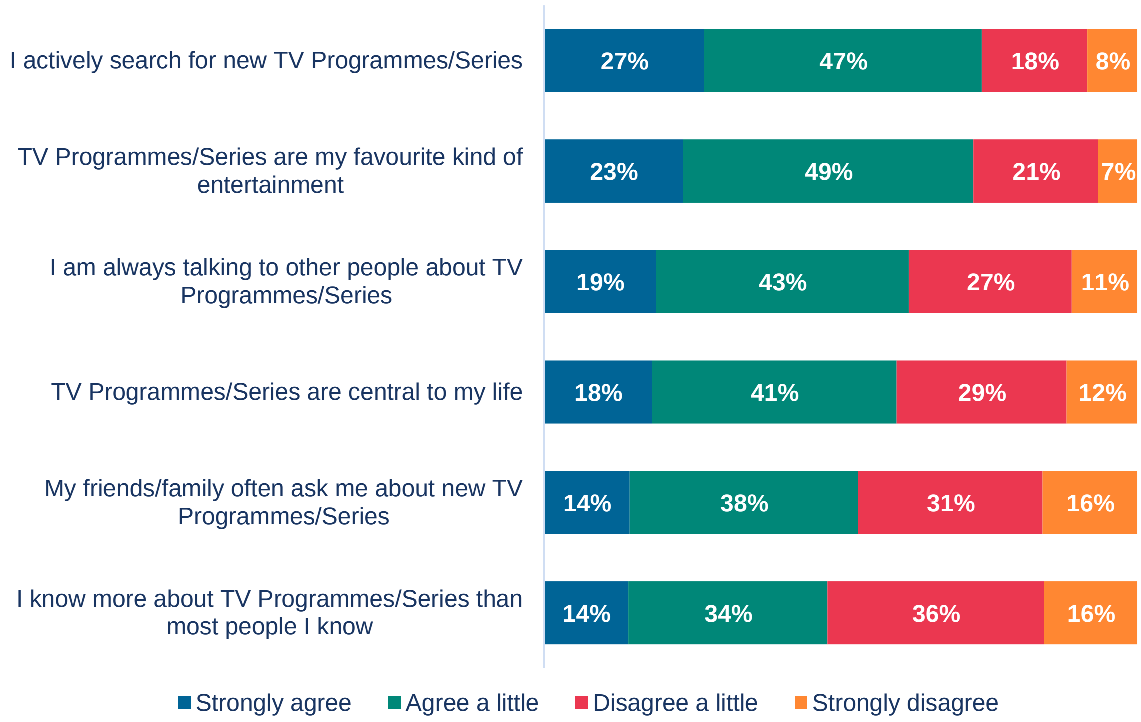
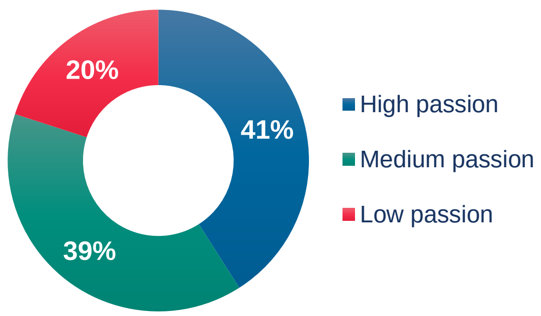
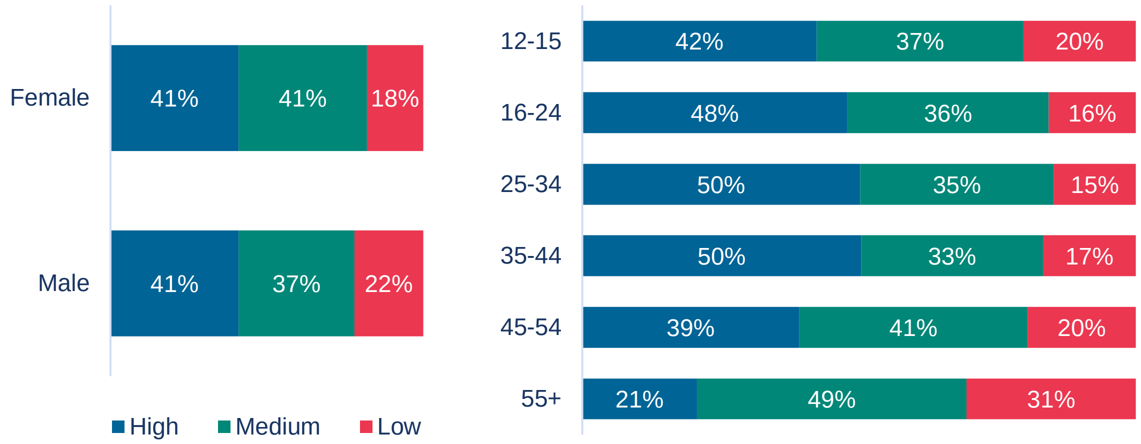
[8] The definition of 'shared' given was: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in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

- When looking at individual statements, as with film, **discovery** emerged as a key factor. The most agreed with statement overall (74%) was "I actively search for new TV programmes/series".

C2. To what extent do you agree or disagree that each of the following statements describe you?







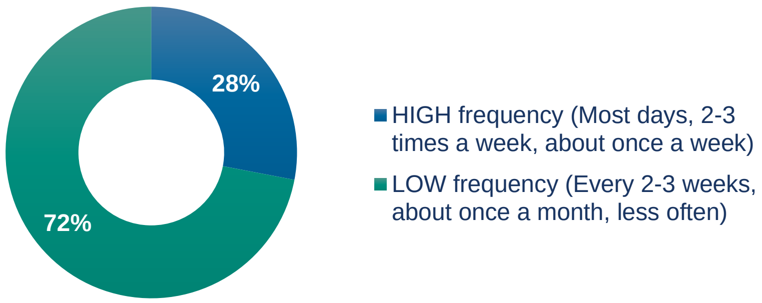
Base: 2,508 (downloaded, streamed, shared and/or purchased physical copies of TV programmes/series in the past 3 months)

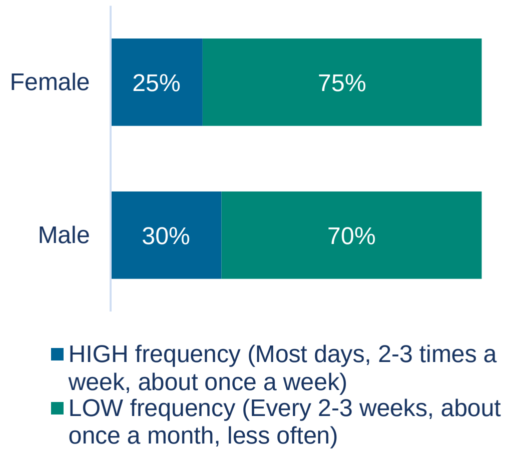
Physical purchasing of TV programmes/series

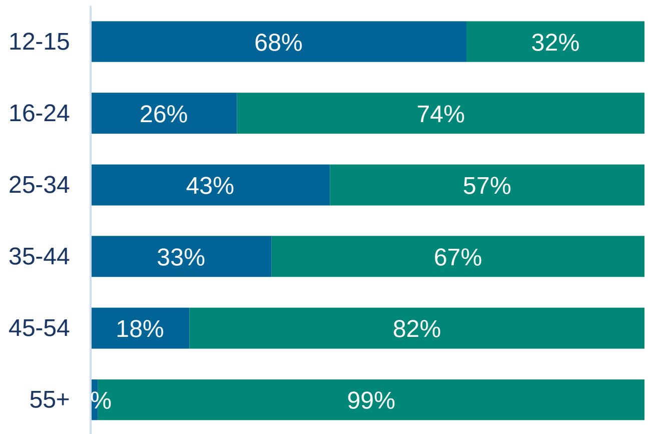
Respondents were asked about purchasing TV programmes/series in physical formats, focusing on frequency and number purchases made.

- Approximately a quarter (28%) were frequent purchasers of TV programmes/series in physical formats.
- On average, respondents purchased 7 items over a 3-month period.
- Interestingly, the youngest age group (12-15) were the most engaged with physical formats, purchasing slightly more products and more frequently than the average
- The small sample size for all age groups means that these break downs should be interpreted with caution (e.g. the largest was those aged 35-44 where N=50).

<u>C3. Generally, how often do you purchase physical TV programmes/series (on DVD, Blu-Ray etc.)?</u>

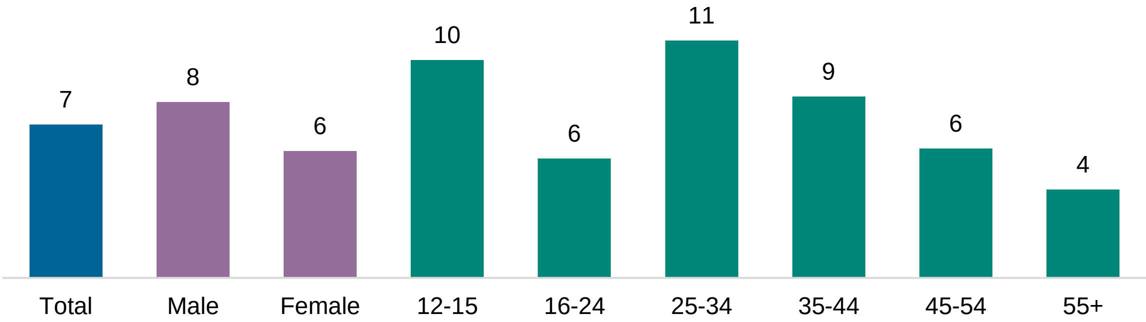






Base: 279 (purchased physical copies of TV programmes/series in the past 3 months)

C4. In the past 3 months how many physical TV programmes/series (DVDs, Blu-Rays etc.) did you purchase? (Average purchases)



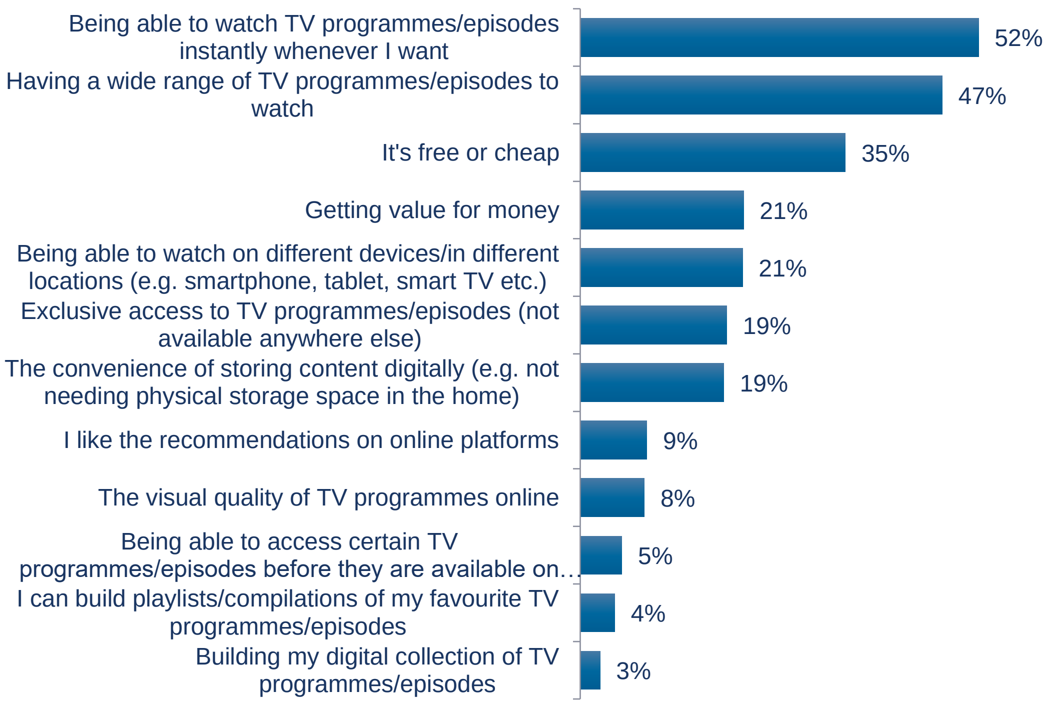
Base: 210 (purchased physical copies of TV programmes/series in the past 3 months)

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 around half or more respondents. These related to **ease of access** (52% "being able to watch TV programmes/episodes instantly whenever I want") and the **range** of options available (47% "having a wide range of TV programmes/episodes to watch").
- 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" (35%) or offers "value for money" (21%).
- Other factors that were mentioned by approximately a fifth were **portability** in terms of devices and locations (21%), access to **exclusive content** (19%), and the "**convenience** of storing content digitally" (19%).

C5. What are the main reasons that you choose to access TV programmes/episodes online (i.e. downloading or streaming)? Please select your top 3. (%)



Base: 2,400 (downloaded or streamed TV programmes/episodes online in the past 3 months)

Male Respondents	Female Respondents
1. Being able to watch TV programmes/episodes instantly whenever I want (47%) 2. Having a wide range of TV programmes/episodes to watch (45%) 3. It's free or cheap (36%)	1. Being able to watch TV programmes/episodes instantly whenever I want (57%) 2. Having a wide range of TV programmes/episodes to watch (49%) 3. It's free or cheap (33%)

Aged 12-15	**Aged 16-24**
1. Being able to watch TV programmes/episodes instantly whenever I want (43%) 2. Having a wide range of TV programmes/episodes to watch (34%) 3. Being able to watch on different devices/in different locations (e.g. smartphone, tablet, smart TV etc.) (33%)	1. Having a wide range of TV programmes/episodes to watch (51%) 2. Being able to watch TV programmes/episodes instantly whenever I want (50%) 3. It’s free or cheap (33%)
Aged 25-34	**Aged 35-44**
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 (31%)	1. Being able to watch TV programmes/episodes instantly whenever I want (52%) 2. Having a wide range of TV programmes/episodes to watch (49%) 3. It’s free or cheap (30%)
Aged 45-54	**Aged 55+**
1. Being able to watch TV programmes/episodes instantly whenever I want (58%) 2. Having a wide range of TV programmes/episodes to watch (50%) 3. It’s free or cheap (31%)	1. Being able to watch TV programmes/episodes instantly whenever I want (54%) 2. It’s free or cheap (45%) 3. Having a wide range of TV programmes/episodes to watch (44%)

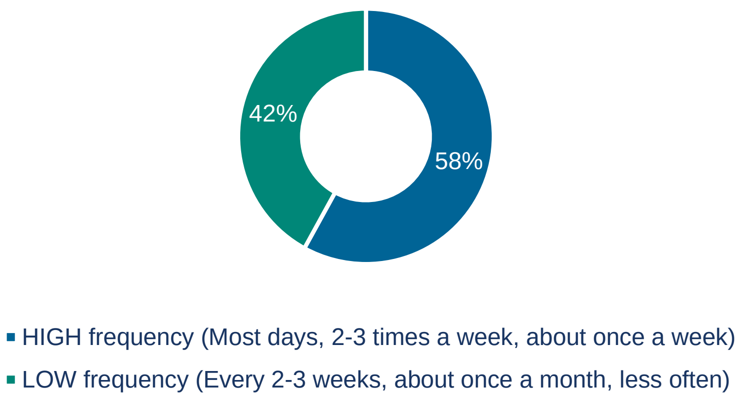
Downloading TV programmes/series

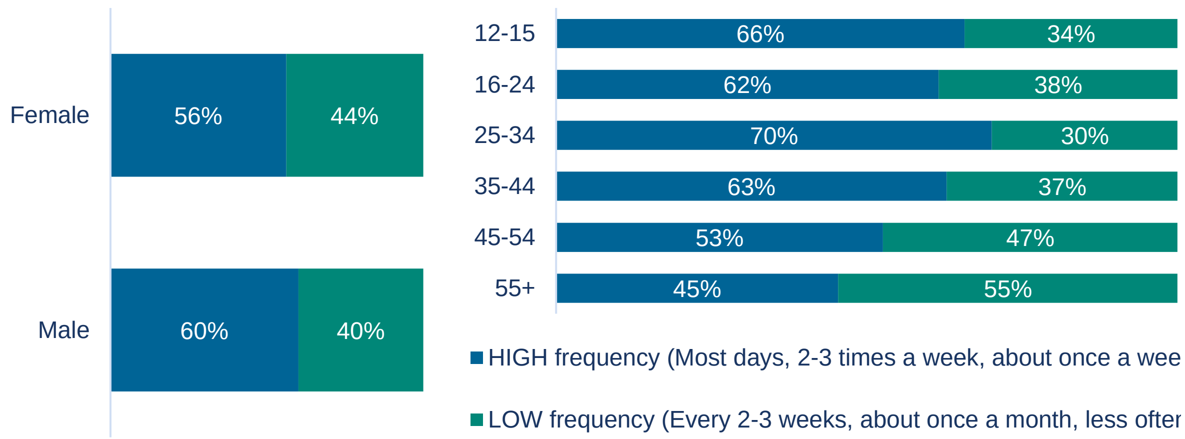
The 22% who had downloaded TV programmes/series during the previous 3 months were asked more questions around frequency, volume and sources used.

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 consistently high among those aged 12-44, with at least 62% downloading at least once a week. Older age groups, in comparison, downloaded less frequently.
- Looking at volume, those aged 16-24 stood out as being particularly avid downloaders of TV programmers/series. They downloaded, on average, 69 episodes in 3 months, compared to an overall figure of 49.

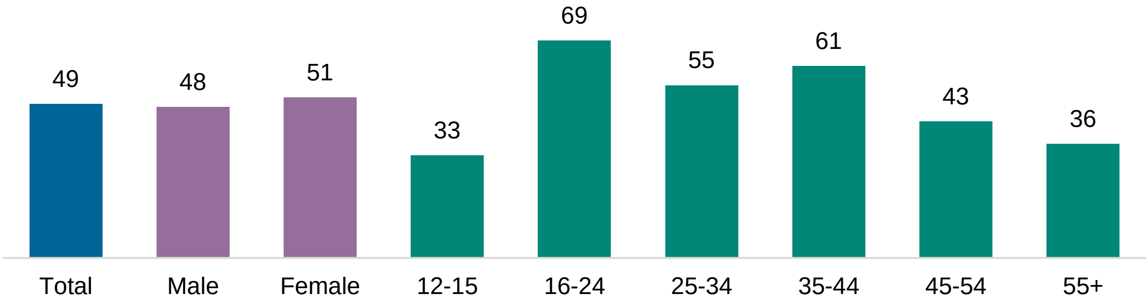
C6. Generally, how often do you download TV programmes/episodes through the internet? (%)





Base: 1,136 (downloaded TV programmes/series in the past 3 months)

C7. In the past 3 months how many TV programmes/episodes did you download through the internet? (average number of downloads)



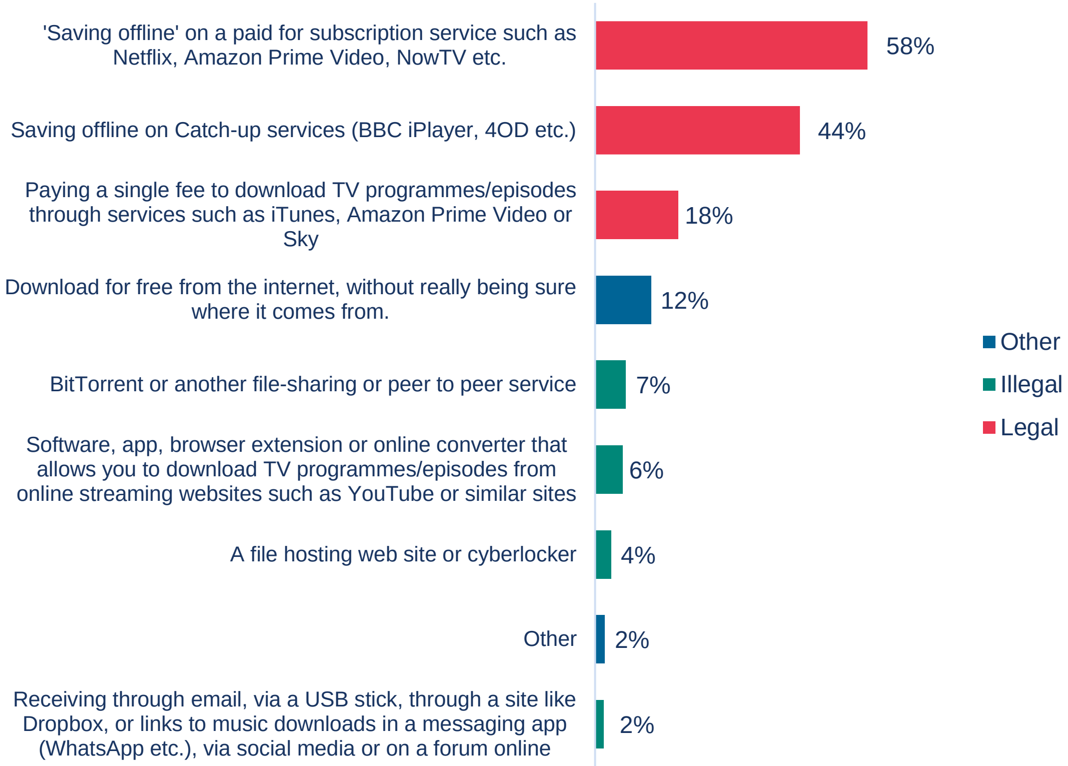
Base: 1,115 (downloaded TV programmes/series in the past 3 months)

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 common method overall was "Saving offline on a paid subscription service", undertaken by 58% 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%).

C8. Which of the following have you used to download TV programmes/episodes 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.	57%	60%	61%	79%	72%	65%	53%	35%
Saving offline on Catch-up services (BBC iPlayer, 4OD etc.)	40%	48%	29%	32%	36%	44%	47%	60%
Paying a single fee to download TV programmes/episodes through services such as iTunes, Amazon Prime Video or Sky	19%	17%	23%	12%	21%	24%	20%	12%
Download for free from the internet, without really being sure where it comes from	13%	11%	14%	14%	10%	9%	9%	15%
BitTorrent or another file-sharing or peer to peer service	8%	5%	6%	9%	8%	10%	5%	4%
Software, app, browser extension or online converter that allows you to download TV programmes/episodes from online streaming websites such as YouTube or similar sites	7%	5%	6%	6%	6%	4%	7%	6%
A file hosting web site or cyberlocker	3%	4%	6%	5%	7%	3%	2%	0%
Receiving through email, via a USB stick, through a site like Dropbox, or links to downloads in a messaging app (WhatsApp etc.), via social media or on a forum online	2%	2%	4%	2%	2%	2%	1%	1%

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

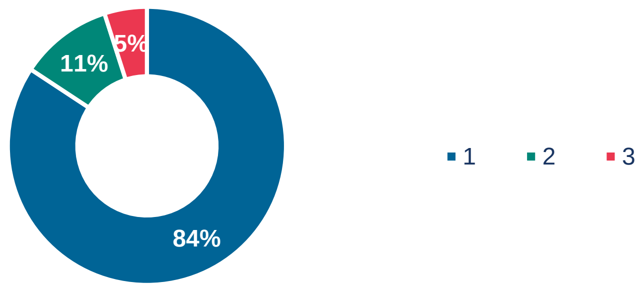
Base: 1,136 (downloaded TV programmes/series during the past 3 months)

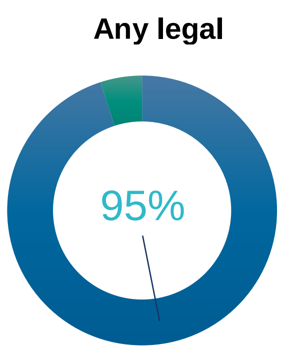
Legality of TV programmes/series downloads

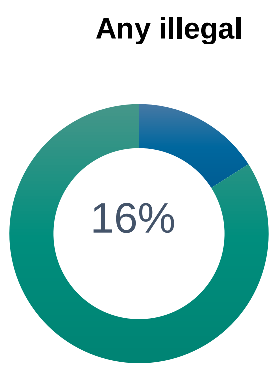
To better understand the distribution of sources across legal and illegal categories, those who had downloaded TV programmes/series in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

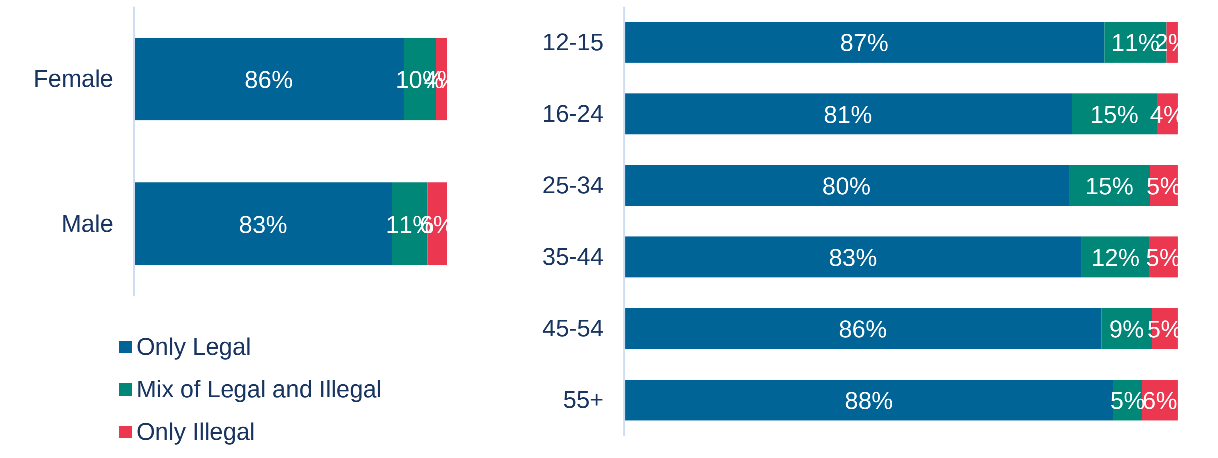
The answer option "download for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

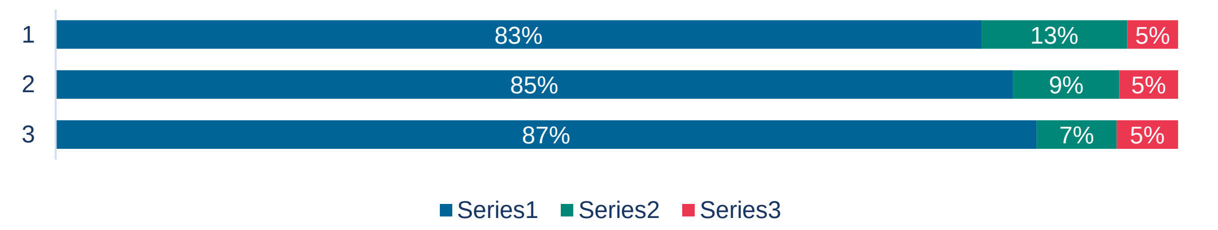
- Legal:
  - 95% had used a legal source to download TV programmes/series.
  - 84% had used only legal sources to download TV programmes/series.
- Illegal:
  - 16% had used an illegal source to download TV programmes/series.
  - 5% had used only illegal sources to download TV programmes/series.
- Mixed:
  - 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 aged 16-34 (15%).











Base: 1,052 (downloaded TV programmes/series in the past 3 months, with those who selected 'other' or 'not sure of source' removed).

<u>C9. And how is the way you download TV programmes/episodes typically split across the following sources?</u>

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%	27
	Saving offline on Catch-up services (BBC iPlayer, 4OD etc.)	29%	11
	Paying a single fee to download TV programmes/episodes through services such as iTunes, Amazon Prime Video or Sky	9%	4
Illegal	BitTorrent or another file-sharing or peer to peer service	4%	2
	Software, app, browser extension or online converter that allows you to download TV programmes/episodes from online streaming websites such as YouTube or similar sites	2%	1
	A file hosting web site or cyberlocker	1%	1
	Receiving through email, via a USB stick, through a site like Dropbox, or links to downloads in a messaging app (WhatsApp etc.), via social media or on a forum online	1%	0
Other	Download for free from the internet, without really being sure where it comes from	8%	2
	Other	2%	1

Base: 1,115 (downloaded TV programmes/series in the past 3 months)

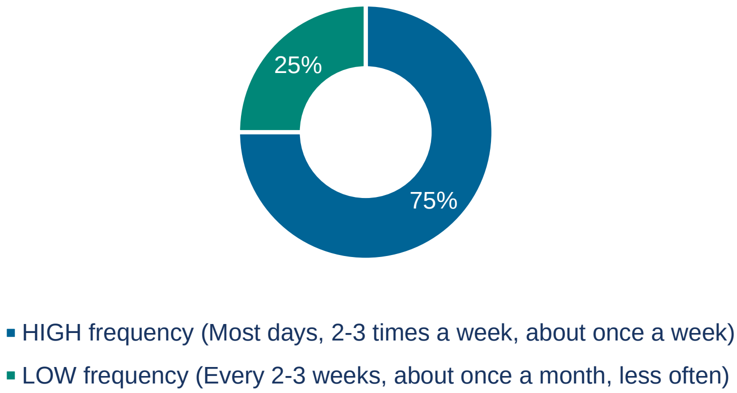
Streaming TV programmes/series

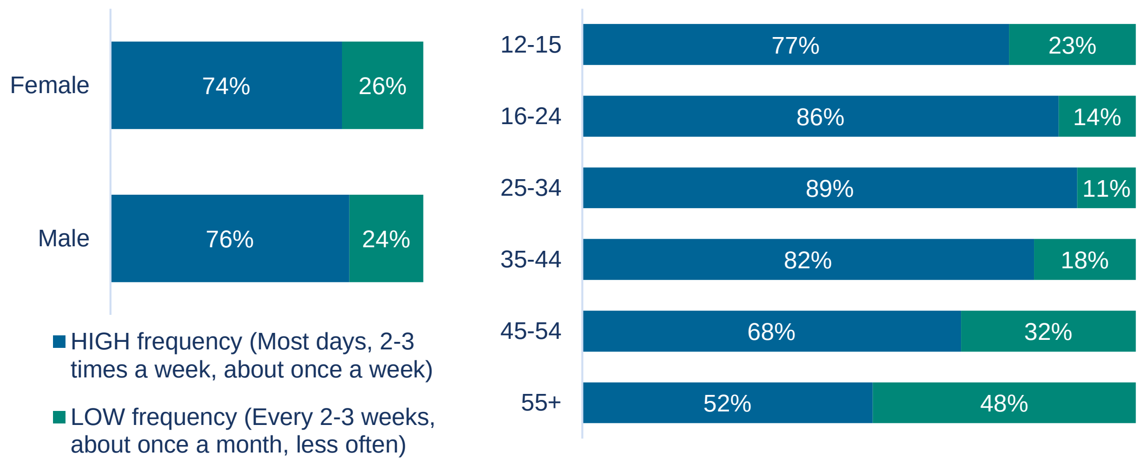
The 42% who had streamed TV programmes/series during the previous 3 months were asked questions around frequency, volume and sources used.

Frequency and volume of streaming TV programmes/series

- **Three-quarters (75%) were frequent streamers of TV programmes/series**, doing so weekly. This was also notably higher than the proportion who were frequent downloaders of **TV programmes/series** within the same time period (58%).
- Frequency of streaming was generally consistent among those aged **12-44**, and then dropped slightly for those aged 45+.
- On average, TV streamers watched 101 hours every 3 months. This was even higher for those aged **16-34**, who consumed 130 hours plus every 3 months.

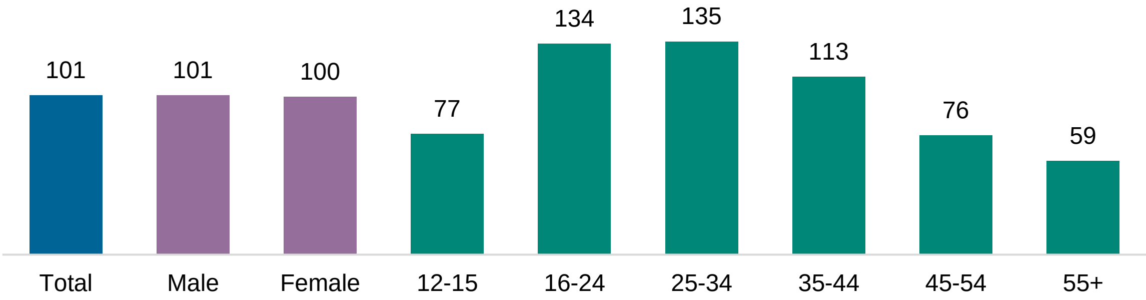
C10. Generally, how often do you stream TV programmes/episodes through the internet? (%)





Base: 2,137 (streamed TV programmes/series in the past 3 months)

C11. In the past 3 months how many hours did you spend streaming TV programmes/episodes through the internet? (Average number)



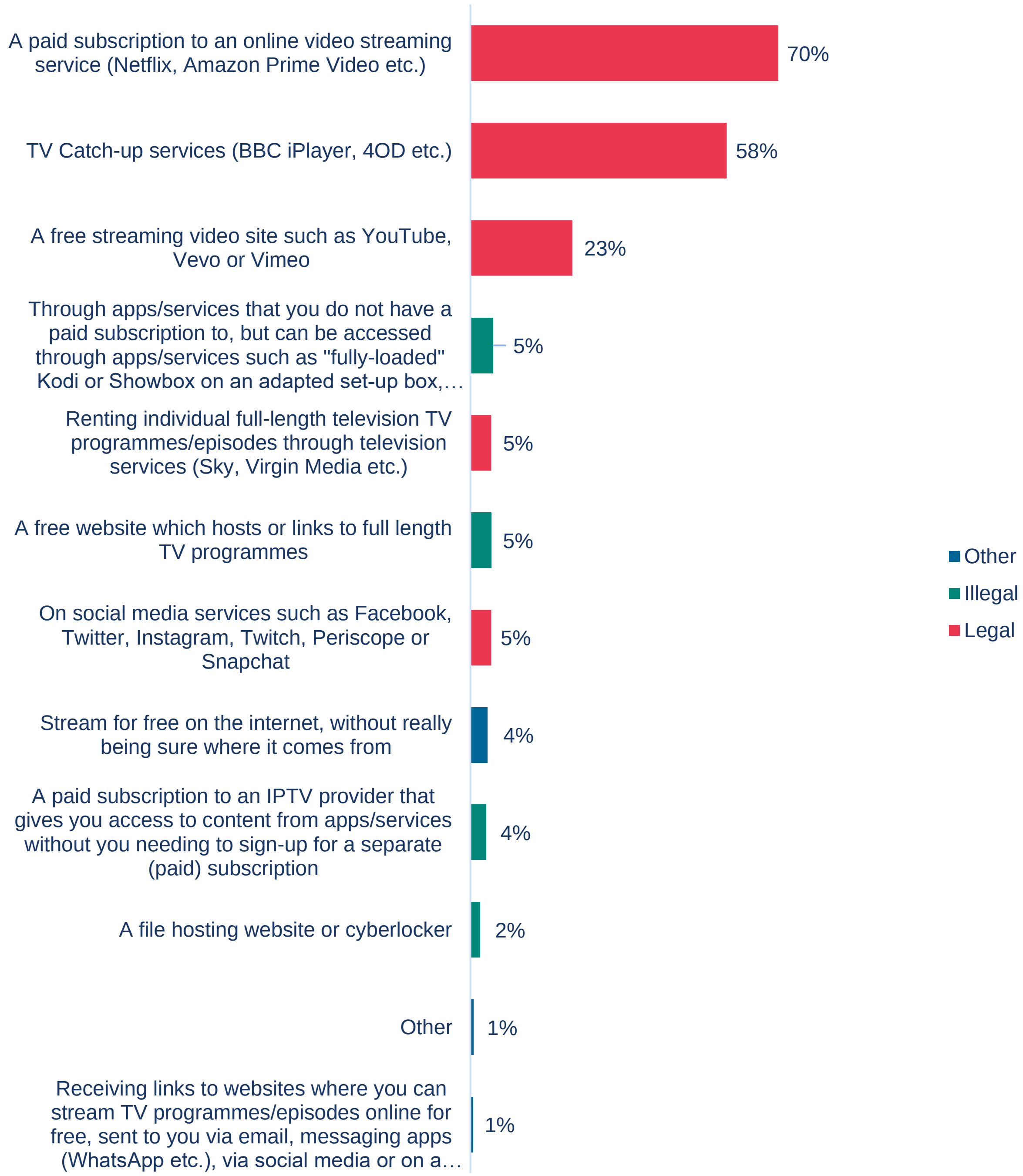
Base: 2,126 (streamed TV programmes/series in the past 3 months)

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.

- **Encouragingly, legal sources were the most used.** Furthermore, the top option, was a paid source, with 70% using a **"paid subscription to an online video streaming service"**. This was closely followed by "TV Catch-up services", which were used by over half (58%). Approximately a quarter (23%) used "A free streaming video site such as YouTube".
- **No illegal source was used by more than 5%**. It is notable, however, that 10% of those aged 16-24 said that they had used "A free website which hosts or links to full length TV programmes" (this was almost twice as much as any other age group).

C12. Which of the following have you used to stream TV programmes/series in the past 3 months? (%)



	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.)	70%	69%	70%	86%	82%	75%	65%	44%
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%	3%	6%	3%	6%	4%	1%	1%
On social media services such as Facebook, Twitter, Instagram, Twitch, Periscope or Snapchat	6%	4%	8%	5%	7%	5%	3%	2%
A free streaming video site such as YouTube, Vevo or Vimeo	24%	22%	30%	25%	23%	22%	21%	22%
A file hosting website or cyberlocker	3%	2%	4%	5%	2%	2%	2%	0%
TV Catch-up services (BBC iPlayer, 4OD etc.)	53%	64%	43%	46%	50%	55%	64%	78%
Renting individual full-length television TV programmes/episodes through television services (Sky, Virgin Media etc.)	4%	6%	3%	3%	4%	8%	6%	4%
A free website which hosts or links to full length TV programmes	5%	4%	5%	10%	6%	4%	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 on an adapted set-up box, your Smart TV, mobile devices or entertainment sticks such as the Amazon Fire Stick or the Google Chromecast.	5%	5%	4%	4%	7%	4%	6%	4%
Stream for free on the internet, without really being sure where it comes from	5%	3%	6%	5%	4%	4%	1%	4%
Receiving links to websites where you can stream TV programmes/episodes online for free, sent to you via email, messaging apps (WhatsApp etc.), via social media or on a forum online	1%	0%	1%	0%	1%	1%	0%	0%
Other	1%	1%	2%	0%	1%	0%	1%	1%

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

Base: 2,140 (streamed TV programmes/series in the past 3 months from the listed sources, unsure removed)

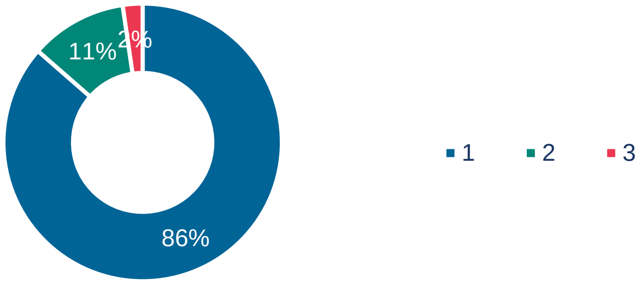
Legality of TV programmes/series streaming

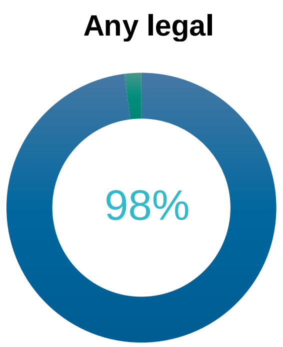
To better understand the distribution of sources across legal and illegal categories, those who had streamed TV programmes/series in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

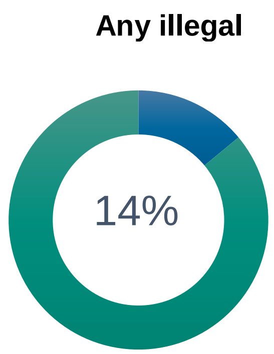
The answer option “Stream for free from the internet, without really being sure where it comes from” was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

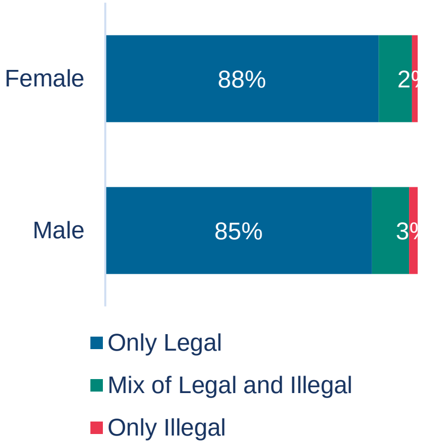
- Legal:
    - Almost all (98%) had used at least one legal source to stream TV series/programmes.

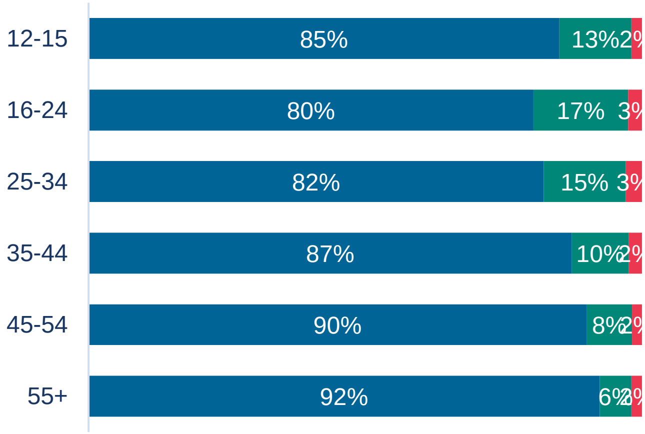
- ○ **86%** had used only legal sources to stream TV series/programmes
- Illegal:
  - ○ 14% had used at least one illegal source to stream TV series/programmes.
  - ○ **3%** had used only illegal sources to stream TV series/programmes.
- Mixed:
  - ○ 11% had used a mix of legal and illegal sources to stream TV series/programmes.

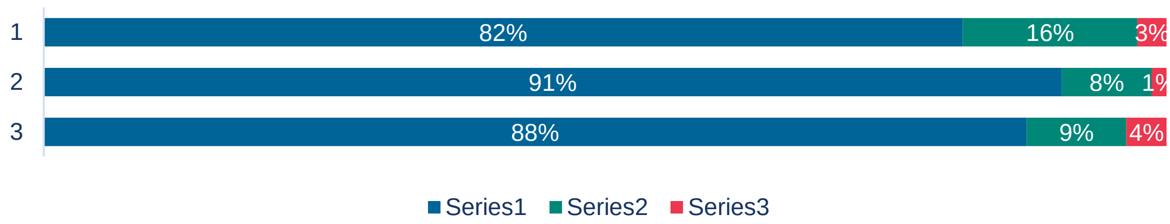












Base: 2,129 (streamed TV programmes/series in the past 3 months, with those who selected 'other' or 'not sure of source' removed)

C13. And how is your time spent streaming TV programmes/episodes typically split across the following sources?

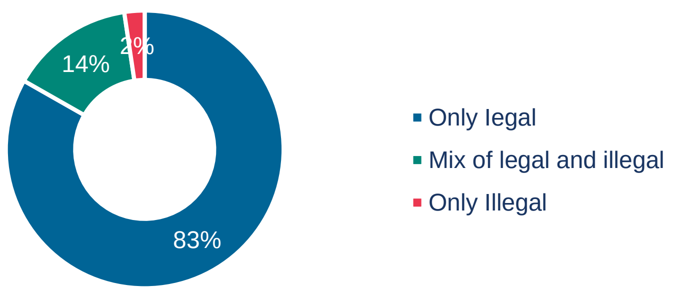
Legality	Source	Average % of usage split	Average hours of streaming
Legal	A paid subscription to an online video streaming service (Netflix, Amazon Prime Video etc.)	51%	64
	TV Catch-up services (BBC iPlayer, 4OD etc.)	31%	20
	A free streaming video site such as YouTube, Vevo or Vimeo	8%	7
	Renting individual full-length television TV programmes/episodes through television services (Sky, Virgin Media etc.)	2%	1
	On social media services such as Facebook, Twitter, Instagram, Twitch, Periscope or Snapchat	1%	1
Illegal	Through apps/services that you do not have a paid subscription to, but can be accessed through apps/services such as Kodi or Showbox	2%	2
	A free website which hosts or links to full length TV programmes	2%	2
	A paid subscription to an IPTV provider that gives you access to content from apps/services without you needing to sign-up	2%	1
	A file hosting website or cyberlocker	1%	1
Other	Stream for free on the internet, without really being sure where it comes from	2%	1
	Other	1%	0

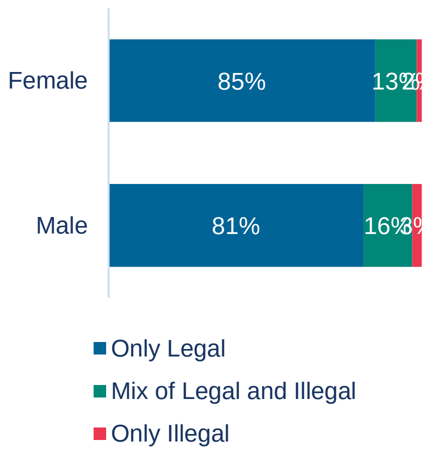
Base: 1,136 (streamed TV programmes/series in the past 3 months)

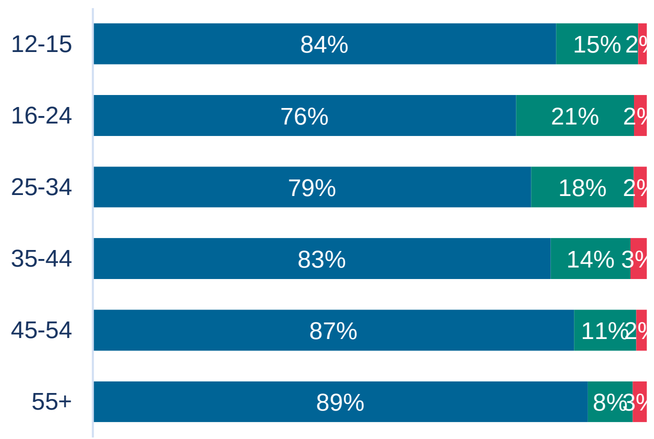
Combined downloading and streaming of TV programmes/series

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.

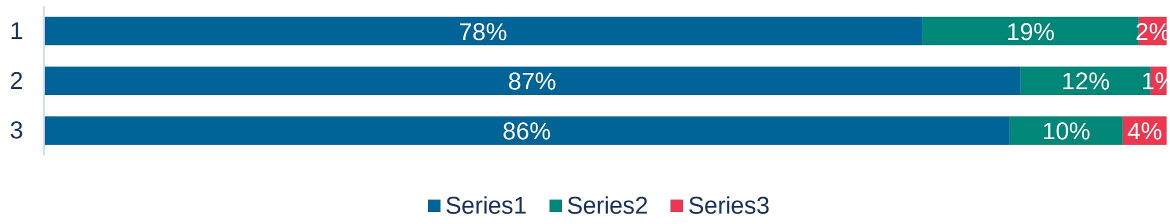
- Legal:
    - **83%** indicated that they use legal sources only.
    - Legal only use was lowest among those aged 16-24 (76%), with this gradually increasing among each of the older age groups (89% for 55+).
- Illegal:
    - **2%** used illegal sources only.
- Mixed:
    - **14%** used a mix of legal and illegal sources.
    - Using a mix of legal and illegal sources was highest among those aged 16-24 (21%) with this gradually decreasing among each of the older age groups (8% for 55+).







Base: 2,388 (streamed and/or downloaded TV programmes/series from a legal or an illegal source, with those who only selected 'not sure of source' counting as illegal)

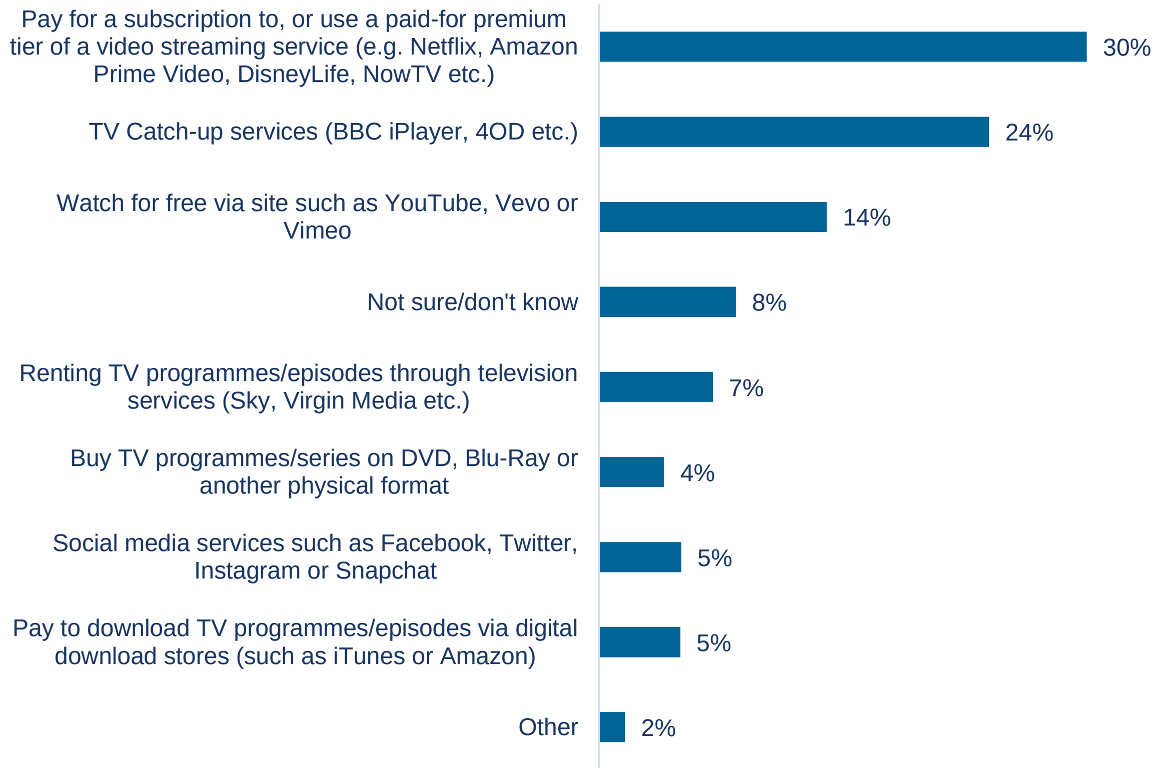


Alternatives to infringement

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 24%, followed by free video sites, such as YouTube by 14%.
- No other single source was selected by more than 7%, with 8% indicating that they were unsure what they would do.

C14. If TV programmes/episodes 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+
Pay for a subscription to, or use a paid-for premium tier of a video streaming service (e.g. Netflix, Amazon Prime Video, DisneyLife, NowTV etc.)	27%	33%	24%	47%	34%	24%	32%	10%
Watch for free via site such as YouTube, Vevo or Vimeo	14%	14%	18%	9%	15%	15%	14%	16%
Pay to download TV programmes/episodes via digital download stores (such as iTunes or Amazon)	6%	3%	4%	4%	11%	3%	0%	2%
Social media services such as Facebook, Twitter, Instagram or Snapchat	6%	5%	16%	4%	4%	6%	4%	4%
TV Catch-up services (BBC iPlayer, 4OD etc.)	23%	26%	15%	19%	21%	21%	36%	34%
Renting TV programmes/episodes through television services (Sky, Virgin Media etc.)	8%	5%	8%	5%	8%	11%	0%	10%
Buy TV programmes/series on DVD, Blu-Ray or another physical format	4%	5%	12%	6%	1%	5%	4%	2%
Other	2%	1%	0%	1%	1%	1%	0%	6%
Not sure/Don’t know	10%	7%	4%	5%	5%	13%	10%	14%

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

Base: 434 (downloaded and/or streamed TV programmes/series illegally)

Qualitative Insight for Film and TV

Engagement with film and TV

Film and TV are highly valued for their ability to enable people to **escape** into a different world, to learn something new or to relax before bed, on a lunch break or when commuting. What particularly stands out about film and TV, compared to other entertainment activities, such as reading or video games, is the **ease of consumption**, i.e. requiring no active engagement or effort. While people often dedicate windows of time to watching a particular programmes/series, it is often also on in the background~~.~~

There also appears to be an important **communal element**. More specifically, wanting to watch popular films or TV programmes/series at the same time as others, so as not to miss out on conversations happening among friends or in the workplace. As such, many actively seek to stay up to date with the latest films or TV content.

- *"I love losing myself in a good film." Male, 35-44*

- *"I realised that I can get away with not hearing the latest albums or songs, but new TV shows and movies, I can't miss out on, especially with everyone around me constantly speaking about them!" Male, 20-24*

- *"Our lives are so busy now, it's becoming harder and harder to find the time to sit and concentrate on one activity alone, but with TV you can be doing other things too, especially if your brain works fast like mine does. Very often I can be watching TV, reading and having a conversation all at the same time, without missing anything that's going on." Female, 45-54*

Understanding online consumption of film and TV

One of the main benefits referenced in relation to watching films and TV online is being able to **consume content at any time or in any place**. The portability across devices and locations offers freedom, meaning that people are no longer restricted to needing to be in front of a television.

Having a **broad selection** of content to choose from is another commonly identified benefit. Online platforms are enjoyed for their added value elements, beyond just providing access to vast catalogues of familiar content. Firstly, many felt that new releases tend to be available more quickly online when compared to physical formats. Also, online subscription platforms serve as a useful method of discovery, steering viewers to content that matches their tastes via "recommendations" or that is popular (e.g. the What's New" sections of catch-up services such as BBC iPlayer).

However, one frustration with film and TV subscription services is that **content is spread across multiple platforms**. Many felt that to be able to access the range they would like, they would have to commit to more than one, which would require too high a financial commitment. Comparatively, with music, there is a sense that one subscription platform is generally enough to meet consumers' needs.

- *"Internet means that I can see films/TV series when I want, not just when they are screened. Often a full series will be available online after the first one is shown on TV, which means that I can binge watch it and I can catch up with TV episodes I* *have missed on TV. Films are available to view via a fee very soon after they have been screened at the cinema and before the DVD is in the shops, so now I have a choice to see the film at the cinema or via the Internet a short while later." Female, 45-54*

- *"It's around £8 for Netflix, £8 for Amazon, £8 just for NowTV, £6 for DisneyLife soon to be Disney+ which will be £10, £10 for WWE Network, £12 for YouTube Premium. It means that access to many of these services do start to add up if you want a few of them. When you consider that you only need one music subscription to access pretty much all the music ever, it's easy to see why people only subscribe to one or two and get the other bits they need via piracy. I'm not saying it leads specifically to piracy, but certainly does nothing to curb it." Male, 35-44*

Legality of film and TV downloads

Given the **popularity and amount of legal methods of access** available, illegal downloading of films or TV programmes/series in general appears to be less common.

However, there are a few specific instances where the likelihood of illegal downloading tends to increase:

- When people want to access content offline (e.g. while travelling or where stable internet is hard to access).
- If desired content is not available via commonly used legal sources. In this instance, a few switch to downloading content via illegal sources such as BitTorrents, as they perceive this as more secure than streaming (e.g. if sites are invite only, using private versus public trackers).

- *"BitTorrent is my go-to option but only because I use private trackers. The sites I use are well supported and have releases sometimes before providers or being officially released. TV/Films can be searched for and various formats can be found from 480p to 4K and everything in between. You can then move the files between phones/tablets or laptops and watch offline whenever and wherever you want." Male, 35-44*

- *"I generally use bit torrents for new release films or sporting events I cannot get on any of the services I have subscribed to or don't want to pay the one-off price to watch them." Male, 45-54*

Legality of film and TV streaming

Many tend to have access to subscription services such as Netflix, Amazon Prime Video or NowTV, therefore most streaming is via these legal platforms. The impetus to stream illegally, using sites such as Watch Series etc., usually comes with not being able to find a given series or film on their existing subscriptions, new releases which are not yet officially available, or foreign content which is not accessible in the UK.

- *"I generally use my Amazon Prime Video subscription for films as I regularly get to see trials which saves me money. If there is a particular programme or film I want to watch, and it isn't available on Prime, BBC iPlayer etc., I will search YouTube or the Pirate Bay to find it or ask my tech savvy family to send me a link." Male, 45-54*

- *“Watch Series has all the latest American and UK shows as soon as they come out, so I am up to date with my favourite shows and can discover new ones.” Female, 25-34*

For the few who had a Kodi Box, much of their viewing is via this source. Interestingly, most were aware that the box itself/the add-ons can be a bit of a grey area in terms of legality. However, because the box is sold by reputable providers and can be purchased ‘fully loaded’ with content, it was not seen as problematic. There does, however, seem to be an understanding that the use of Kodi becomes questionable if they were to start ‘adding’ content to it themselves from various sources.

- *“90% of my viewing time is spent on my fully loaded Kodi box, watching sport, films & payable tv channels (e.g. Sky Sports). I use it as it’s free - saves a small fortune! It's not illegal as the box came fully loaded. One weakness is that streams buffer all too frequently, but this aside, I would be totally lost without it.” Male, 55+*

Alternatives to infringement

Many reported that no longer having access to their preferred illicit methods for accessing film or TV content **would not drastically change their consumption habits**. This is largely owing to legal methods being preferred sources, with illegal sources mostly being used in specific instances (e.g. when content is not available).

Interestingly, while some felt that their **overall consumption** would decrease, others were of the view that they would simply transfer this time to exploring more legal options.

However, for the minority who use illegal sources for most of their viewing (especially Kodi users), having to consider official alternatives felt daunting largely due to the **additional amount** they feel they would have to pay. Some would also resent having to wait until releases become officially available or no longer having access to foreign content, such as popular US TV series.

- *“I would feel sad if these methods were unavailable from a content availability standpoint. None of the current content providers have a lot of the content I download via the peer to peer methods.” Male, 35-44*

- *“I would be very unhappy if I had to use other methods as it ALL costs! My fully loaded Kodi box is free & provides what I want to see, at my convenience. Should loaded Kodi boxes ever be made illegal, it would massively affect my viewing in a negative way, consumption would drastically reduce (particularly of films & sport including PPV), as would my bank balance, unless the fees of subscriptions go down. I’m sure nothing would offer anything similar to my fully loaded Kodi box.” Male, 55+*

- *“I don't think I would feel much different. I would be slightly restricted if the show wasn't on Netflix or Prime, however I don't see much other change. I might then watch less, and therefore spend less time-consuming films/TV. As we already pay for Netflix and Prime, our expenditure wouldn't change. I definitely wouldn't use YouTube and such, nor buying or renting from a medium such as SkyGo. I would miss the accessibility to literally anything I want, of which I have at the moment.” Female, 25-34*

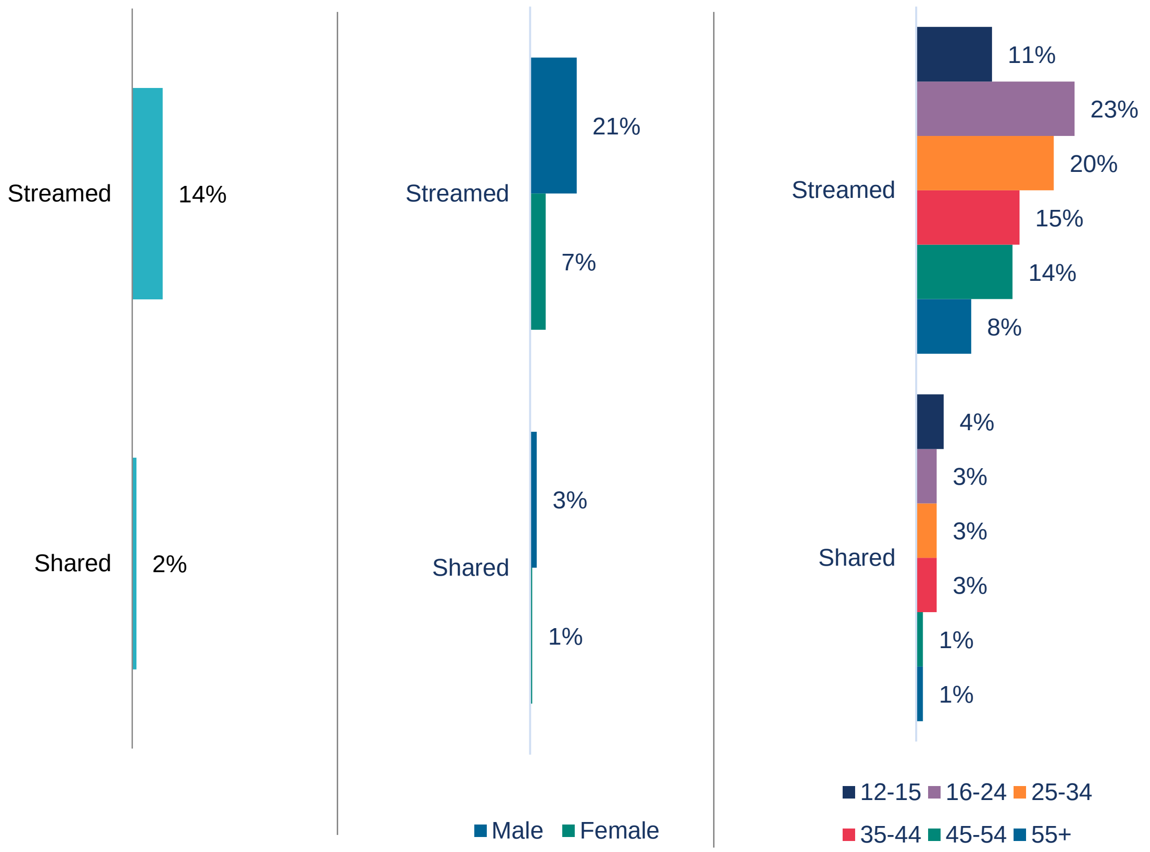
Live Sport

Engaging with live sport

16% had engaged with live sports in the previous 3 months (i.e. either by streaming or sharing).

- Overall, 14% had streamed live sports in the previous 3 months.
- Streaming live sports was notably higher among men (21%) than women (7%), and those aged 16-34.

D1. Have you streamed/shared[9] live sports events in the past 3 months?



Base: 2019 n = 5,014 (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.

- Over half (52%) displayed **high levels of passion for live sports**. This was most evident in those aged 12-15, where 72% scored High, which was 11% more than any other age group.

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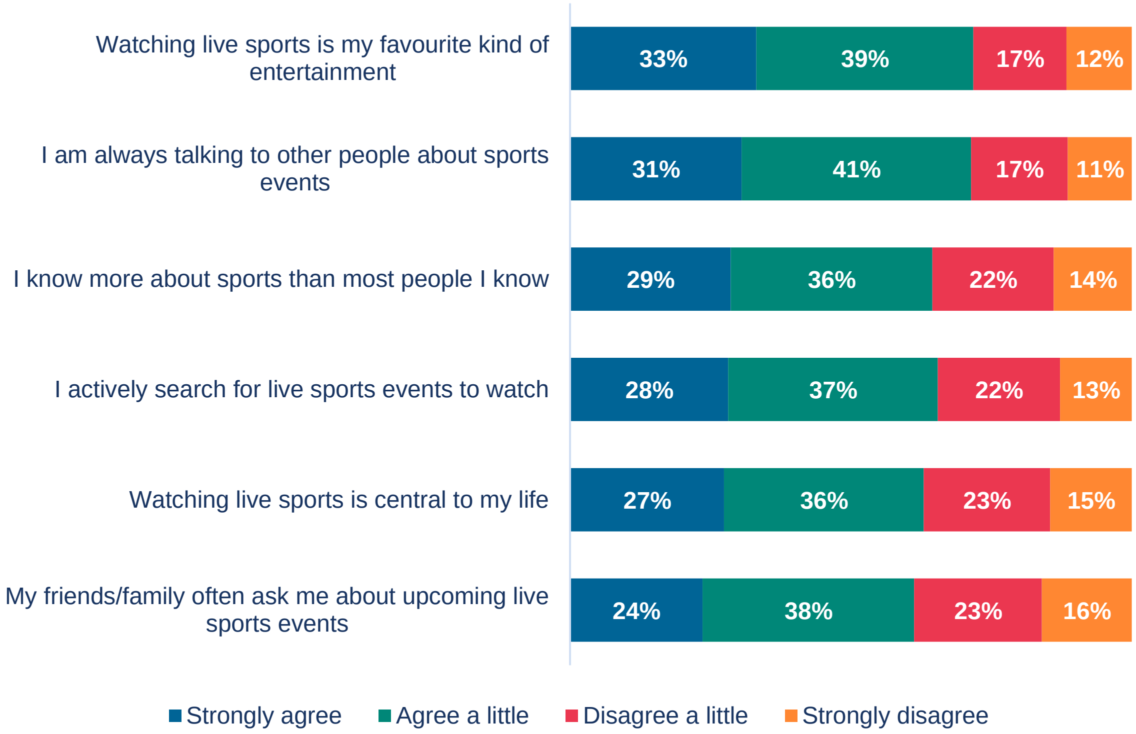
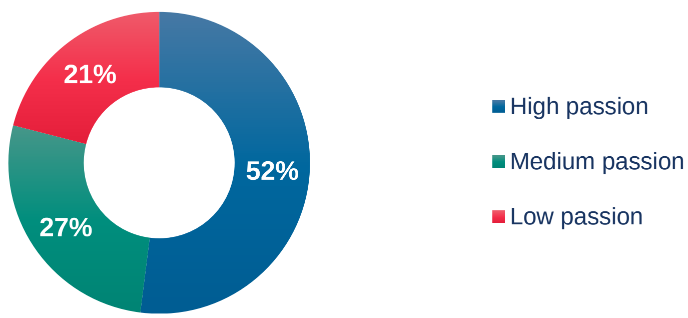
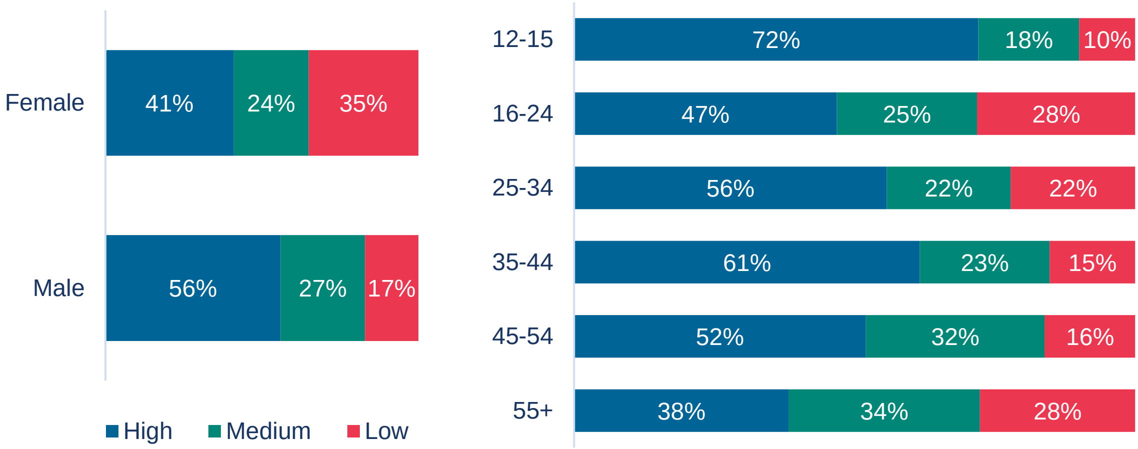
[9] The definition of 'shared' given was: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in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

- While scores across all individual statements were relatively high, the passion for live sports is perhaps most evident in the fact that (joint) top was "watching live sports is my **favourite** kind of entertainment" (72%).

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







Base: 716 (streamed or shared live sport in the past 3 months)

Qualitative Insight

For many, the defining factors in watching live sports are the communal and social aspects. Sharing the sense of anticipation before big matches and events with friends and family or discussing the results and highlights afterwards foster a sense of community in relation to a particular sport or team. This emotional investment is exactly what makes the ability to watch sports in real time so crucial, as nobody wants to be behind and miss out on the reactions, drama and excitement.

Unlike other entertainment sectors where people can choose where and when they consume content, there was a sense that critical to enjoying live sports is the need to tune in at a specific time and place. As such, methods of access are key, and people often spend time researching these and planning in advance.

- *"I love the atmosphere when you are watching sports. I really like the banter with friends and family and being part of an event." - Male, 35-44*

- *"There is no way I would give up watching the footy. As well as entertaining you, it gives you the ability to be inspired and you care about more than just the game itself. I feel invested in the athletes and sporting personalities too. It creates a sense of belonging when you support a team." - Female, 45-54*

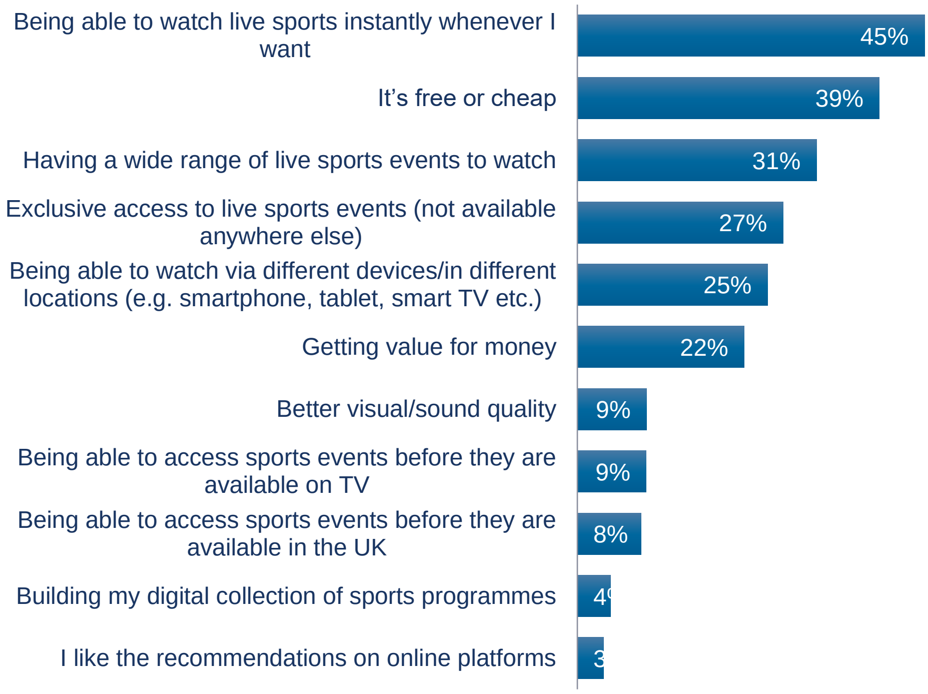
- *"It is the sense of togetherness you get with your friends and family when you share this common interest. It bonds us and also has some exciting moments that we watch again and again." Female 25-34*

Understanding online consumption of live sports

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.
- **Ease of access and convenience** were key factors, with just under half (45%) selecting "being able to watch live sports instantly whenever I want".
- The next most dominant theme was **cost** (39% "It's free or cheap").
- In terms of content, the **range** available (31%) and access to **exclusive** content (27%) also emerged as key motivations.

<u>D3. What are the main reasons that you choose to stream live sports events online? Please select your top 3. (%)</u>



Base: 690 (streamed live sport online)

Male Respondents	Female Respondents
1. Being able to watch live sports instantly whenever I want (46%) 2. It's free or cheap (40%) 3. Having a wide range of live sports events to watch (31%)	1. Being able to watch live sports instantly whenever I want (44%) 2. It's free or cheap (37%) 3. Having a wide range of live sports events to watch (31%)
Aged 12-15	**Aged 16-24**
1. Being able to watch live sports instantly whenever I want (38%) 2. Having a wide range of live sports events to watch (34%) 3. Exclusive access to live sports events (not available anywhere else) (30%)	1. It's free or cheap (49%) 2. Being able to watch live sports instantly whenever I want (49%) 3. Having a wide range of live sports events to watch (38%)
Aged 25-34	**Aged 35-44**
1. It's free or cheap (47%) 2. Being able to watch live sports instantly whenever I want (35%) 3. Exclusive access to live sports events (not available anywhere else) (28%)	1. Being able to watch live sports instantly whenever I want (53%) 2. It's free or cheap (37%) 3. Having a wide range of live sports events to watch (34%)
Aged 45-54	**Aged 55+**
1. Being able to watch live sports instantly whenever I want (52%) 2. Having a wide range of live sports events to watch (35%) 3. It's free or cheap (31%)	1. Being able to watch live sports instantly whenever I want (45%) 2. It's free or cheap (37%) 3. Exclusive access to live sports events (not available anywhere else) (33%)

Qualitative Insight

As is the case with most other forms of media, online access appears to have made watching live sports more accessible and vastly broadened the choice of events available. Respondents mentioned how being able to access live sports online at any hour has helped alleviate issues with events and matches clashing with their schedules (e.g. if they are travelling). It has also provided viewers with a far greater range of events to access rather than being limited to the selection of televised events.

However, given the social nature of watching live sports, there is also a sense of nostalgia which comes when thinking back to when events were largely only available on television and when families and friends watched together. There is a sense that now, with the range and amount of live sports available online, it is becoming more of an individual experience with people largely consuming via their own, personal devices.

Another minor drawback mentioned was around the risk of unreliable streams or internet connections. These can result in buffering and delays which prove highly frustrating for viewers, given the onus on being up to date and not missing a second of the action. As such, compared to television, online viewing can be considered a lot less reliable in this sense.

- *"The best thing about live sports online is simply that it's way easier to keep track of what's happening - I can set myself reminders, look up the dates easily, and access any live feeds more easily than dealing with the hassle of pay-per-view on television. The worst thing about live sport online is that sometimes internet services can go down, be a bit laggy, etc. There are also tons of spoilers around immediately during and after the event, so being even a little bit behind can result in being spoiled as to the outcome of (for example) a boxing match." Male – 25-34*

- *“The best thing about streaming sports online is that it allows you to watch games on the go. You are not restricted to watching your TV only. I was watching the England game in the garden yesterday using my iPad… But, there can be too much choice nowadays and you don’t end up watching the same games as your friends and family, which can be frustrating as you want to share it with each other the next day.” - Female 25-34*

- *“As a child I remember sitting round the tv with my family watching the Olympics over the years and sitting with my dad and/or granddad watching football. It’s funny though as now I look back at it for the purpose of this activity, it makes me realise that although there was less variety of sports on tv in those days, less international sports etc too, it seems like, it was more of an event with family and/or friends… It makes me think though that are there downsides to having too much sport to watch via too many different platforms and mediums etc.?!” - Female 45-54*

- *“Before the Internet, I remember clicking on Teletext and waiting patiently while the pages changed from game to game or league to league. So different from today where you can get a full HD stream for virtually any game. It's amazing that live sports are available online because now I'm able to access it anywhere. Whether a work or family commitment comes in the way, I'm still able to pull out my phone and give it a quick watch.” - Male 20-24*

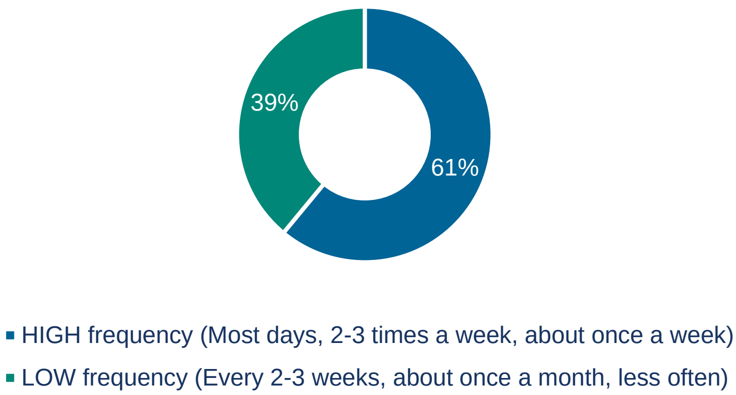
Streaming live sport

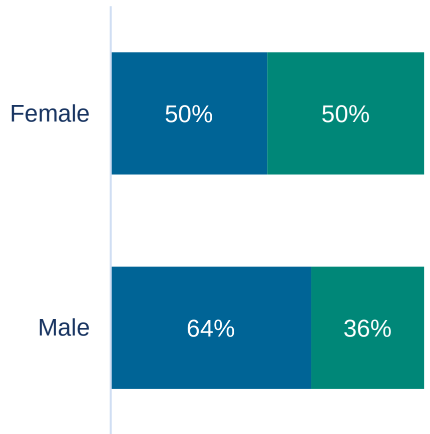
The 16% who had streamed live sport during the previous 3 months were asked more questions around frequency, volume and sources used.

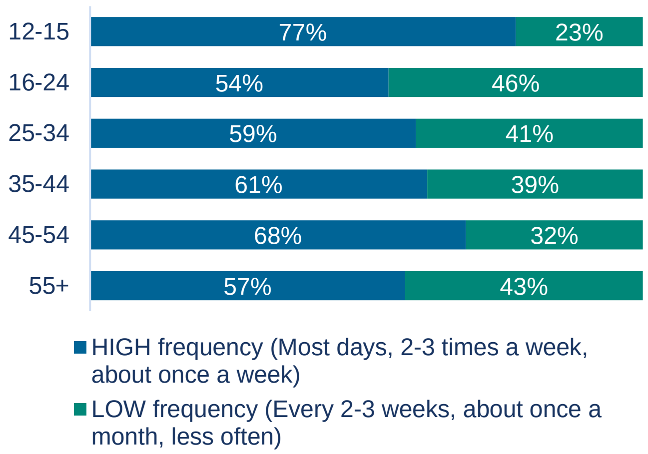
Frequency and volume of streaming live sport

- Six in ten (61%) of those who had streamed live sport did so frequently (i.e. at least once a week). Interestingly, weekly streaming peaked among the youngest age group (77% of 12-15-year olds) and those aged 45-54 (68%).
- Respondents streamed, on average, 24 live sports events every 3 months. Volume was marginally higher among male respondents (26 events every 3 months) and those aged 12-15 (30 events).

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

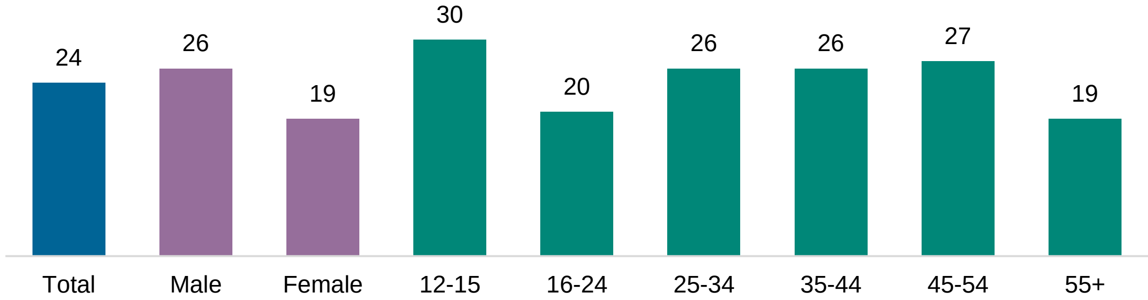






Base: 690 (streamed live sport)

D5. In the past 3 months how many live sports events did you stream through the internet?



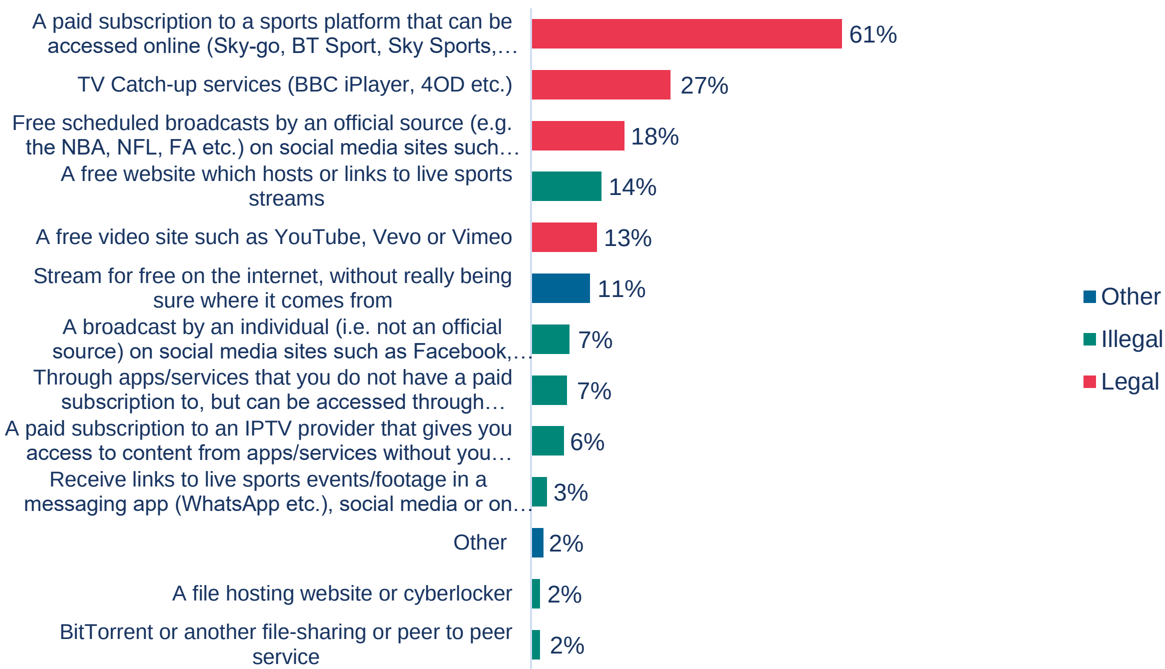
Base: 666 (streamed live sport in the past 3 months)

Sources of streaming live sports

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 (61%) of live sports streamers.
- The next most common option was "TV Catch-up services", selected by around a quarter (27%).
- The most commonly used illegal method was using **"A free website which hosts or links to live sports streams", which was used by 14%**. Those aged 16-24 were more likely to use such sources, with a quarter (24%) doing so. No other illegal sources were used by more than 7%.

D6. Which of the following have you used to stream live sports in the past 3 months? (%)



Base: 690 (streamed live sport)

	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.)	63%	56%	62%	53%	62%	64%	69%	56%
A paid subscription to an IPTV provider that gives you access to content from apps/services without you needing to sign-up	5%	11%	24%	5%	12%	5%	2%	1%
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	18%	20%	25%	25%	18%	23%	14%	11%
A broadcast by an individual (i.e. not an official source) on social media sites such as Facebook, Twitter, Instagram, Twitch, Periscope or Snapchat, or via sites such as YouTube, Vevo or Vimeo	7%	8%	8%	11%	8%	8%	6%	4%
A file hosting website or cyberlocker	2%	1%	4%	2%	3%	2%	1%	0%
BitTorrent or another file-sharing or peer to peer service	2%	1%	0%	1%	4%	0%	1%	2%
A free website which hosts or links to live sports streams	16%	9%	10%	24%	13%	8%	10%	14%
TV Catch-up services (BBC iPlayer, 4OD etc.)	28%	26%	25%	26%	24%	28%	27%	33%
Through apps/services that you do not have a paid subscription to, but can be accessed through apps/services such as Kodi or Showbox	6%	9%	7%	1%	6%	9%	8%	10%
A free video site such as YouTube, Vevo or Vimeo	13%	13%	15%	20%	9%	16%	6%	13%
Receive links to live sports events/footage in a messaging app (WhatsApp etc.), social media or on a forum online	4%	1%	6%	5%	5%	2%	2%	2%
Stream for free on the internet, without really being sure where it comes from	12%	10%	8%	14%	8%	15%	10%	12%
Other	3%	1%	0%	4%	1%	2%	4%	1%

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

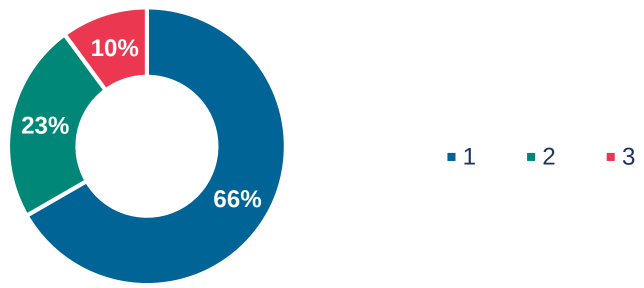
Base: 690 (streamed live sport)

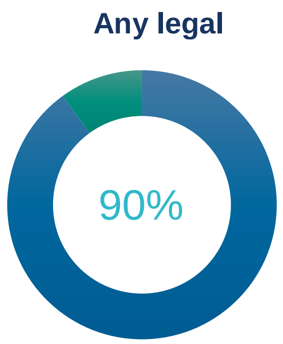
Legality of live sport streaming

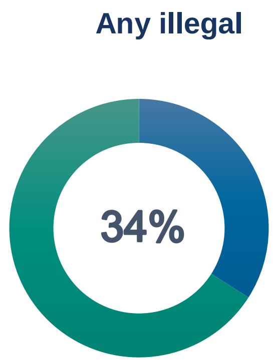
To better understand the distribution of sources across legal and illegal categories, those who had streamed live sport in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

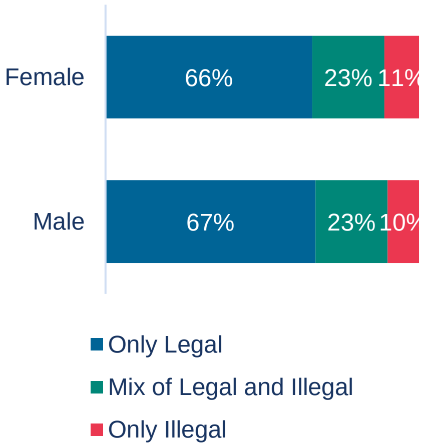
The answer option "download for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content in this way was not included in the base.

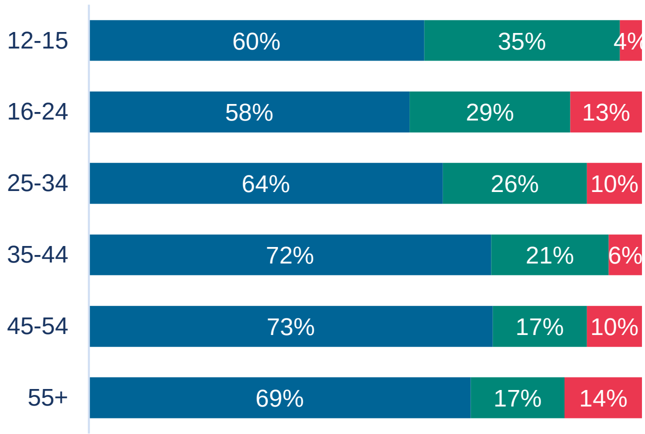
- Legal:
  - Overall 90% had used at least one legal source to stream live sport.
  - **66%** had used only legal sources.
  - Those aged 45-54 were most likely (73%) to use legal sources only.
- Illegal:
  - **34%** had used at least one illegal source to access live sport.
  - 10% had used only illegal sources to access live sport.
- Mixed:
  - 23% had used a mix of legal and illegal sources.
  - Use of a mix of legal and illegal sources peaked among those aged 12-15 (35%).

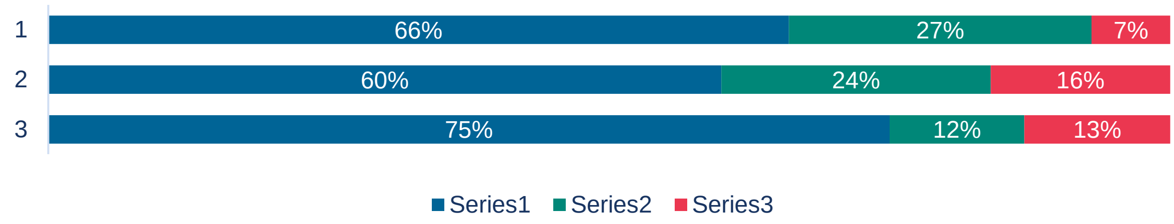












Base: 650 (streamed live sport in the past 3 months, with those who selected 'other' or 'not sure of source' removed)

D7. And how is the way you stream live sports events split across the following sources?

Legality	Source	Average % of usage split	Average hours of streaming
Legal	A paid subscription to a sports platform that can be accessed online (Sky-go, BT Sport, Sky Sports, NOWTV, Amazon Prime etc.)	50%	14
	TV Catch-up services (BBC iPlayer, 4OD etc.)	12%	1
	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 Vimeo	7%	2
	A free video site such as YouTube, Vevo or Vimeo	5%	1
Illegal	A free website which hosts or links to live sports streams	7%	1
	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 on an adapted set-up box, your Smart TV, mobile devices or entertainment sticks such as the Amazon Fire Stick or the Google Chromecast.	4%	1
	A paid subscription to an IPTV provider that gives you access to content from apps/services without you needing to sign-up	3%	1
	A broadcast by an individual (i.e. not an official source) on social media sites like as Facebook, Twitter, Instagram, Twitch, Periscope or Snapchat, or via sites such as YouTube, Vevo or Vimeo	2%	0
	BitTorrent or another file-sharing or peer to peer service	1%	0
	A file hosting website or cyberlocker	1%	0
	Receive links to live sports events/footage in a messaging app (WhatsApp etc.), social media or on a forum online	1%	0
Other	Stream for free on the internet, without really being sure where it comes from	7%	1
	Other	2%	0

Base: 666 (streamed live sports in the past 3 months)

Qualitative insight

Cost, in particular, and perceived ease are the main factors contributing to the illegal streaming of live sports. Given that various sports channels own the rights to different events, many are reluctant to subscribe to more than one or two channels or to pay regular one-off fees for certain events (e.g. boxing matches).

In terms of the process, many simply search for free links via Google or on forums such as Reddit. This usually leads them to links to streams by individuals or from unknown sources. A few also receive links to streams from relatives or friends over social media, with little knowledge of where the links originate from.

Despite the fact that broadcasts by individuals on YouTube or social media are often bad quality streams (e.g. without the ability to enlarge the screen or change volume etc.), many still prefer this to paying a one-off fee or missing an event completely.

A confusing factor for some, is whether a stream is legal by virtue of where it is hosted. Respondents mentioned being unaware of the illegality of certain streams on websites such as YouTube or Reddit as they are considered "trusted", official, sources and many therefore assume any content uploaded to these platforms is legal to watch.

- *"I don't find it difficult to find sports online but it isn't clear if it is all legal, especially if it is offered as a free service." - Male, 35-44*

- *"I would most likely go on Twitter or Reddit and type in the event I'm looking for followed by the word "Stream" and I'm usually given plenty of links." - Male, 20-24*

- *"I access sports online using free website hosting links. There are lots of links so lots of content; if one source doesn't work there are others to try before leaving the website." - Male, 25-34*

- *"A lot of times there are livestreams on YouTube to watch. I'm not sure how legal these are always; sometimes they are from an official looking channel but I'm not subscribed to many of them." - Male 25-34*

- *"It is harder on social media as it tends to take you straight to the site without you knowing the name of the host first. If I can get a name then I will do a quick google search to see if anyone has complained about its legality which usually helps. It is tricky though and does bother me whether I am unwittingly being illegal sometimes." Female 25-34*

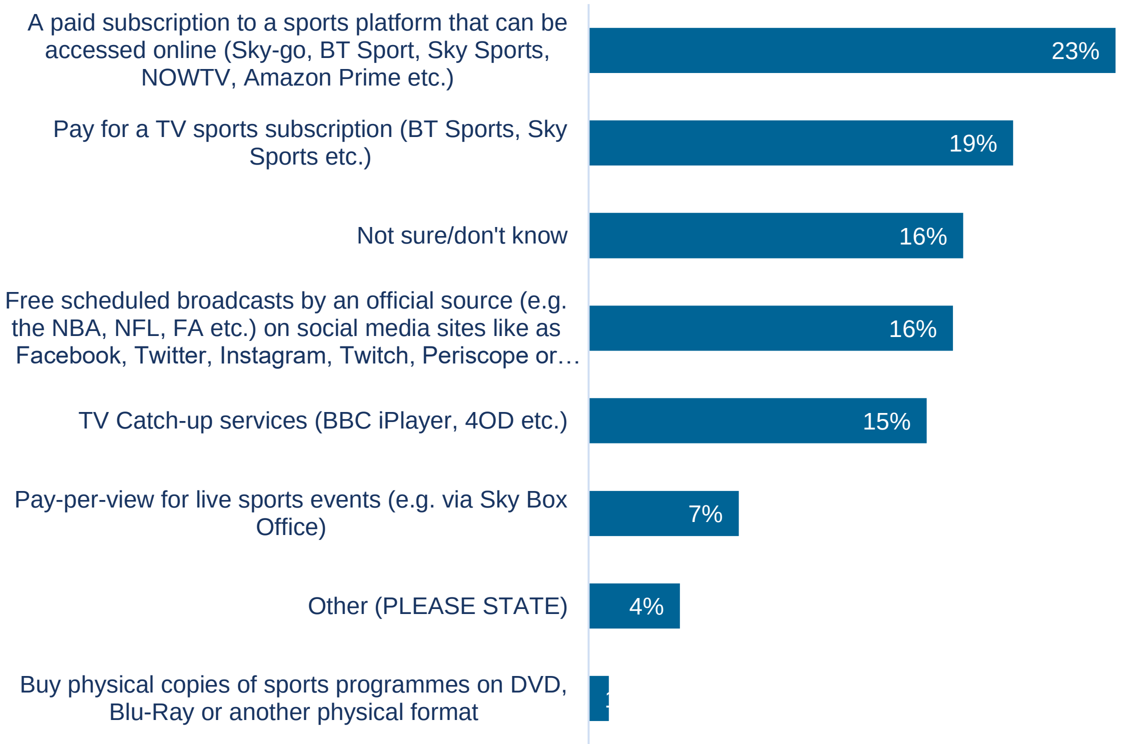
- *"Broadcast by an individual (Facebook, Twitter, YouTube). The strengths are that I can access them anywhere for free on multiple devices. The problems are that I need to watch adverts, I have limited control of the actual stream and it's often poor-quality footage." Male, 35-44*

Alternatives to infringement

Those who had used illegal sources to stream live sports events were asked which *single* legal source they would use if they could no longer access them illegally.

- Interestingly, **no single source was selected by more than a quarter**. Furthermore, one of the highest rates of selection was for "Not sure/don't know".
- Encouragingly, however, the most commonly selected were paid options: 23% said they would use a "Paid subscription to a sports platform that can be accessed online", and 19% would "Pay for a TV sports subscription."

D8. If live sports events were no longer available to 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 paid subscription to a sports platform that can be accessed online (Sky-go, BT Sport, Sky Sports, NOWTV, Amazon Prime etc.)	22%	27%	39%	26%	32%	16%	18%	8%
Pay for a TV sports subscription (BT Sports, Sky Sports etc.)	20%	15%	28%	17%	13%	33%	15%	17%
Pay-per-view for live sports events (e.g. via Sky Box Office)	7%	5%	0%	8%	8%	7%	11%	3%
Buy physical copies of sports programmes on DVD, Blu-Ray or another physical format	7%	5%	0%	8%	8%	7%	11%	3%
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 Vimeo	16%	15%	22%	16%	13%	27%	7%	16%
TV Catch-up services (BBC iPlayer, 4OD etc.)	15%	15%	5%	12%	9%	10%	35%	19%
Other	4%	5%	0%	6%	4%	0%	0%	10%
Not sure/don't know	16%	16%	5%	16%	18%	7%	15%	27%

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

Base: 271 (streamed live sports events illegally)

Qualitative Insights

Many indicated that in the absence of being able to access sports content via (potentially) illegal sources, they would reluctantly look for alternative legal methods. However, there was a general concern that this would restrict and reduce the amount of live sports they would watch overall. Firstly, for budgetary reasons, many said that they would only pay for unmissable events and have to sacrifice many others, opting instead to watch highlights etc. Also, while some would be open to considering paying for a subscription to a sports service, due to licencing, they doubted whether one service could meet all of their sports content needs.

- *“I would consume less sport content because my access to certain sports and events would then be restricted and I would not be able to find this anywhere else. It would be like going back to accessing sport 10-15 years ago which is not a pleasant thought!” - Female 25-34*

- *“I would probably consume less content if the free sources weren't available as I believe I wouldn't be able to find some sports and others would cost me more to access so I would be more discouraged from accessing them.” - Male 35-44*

- *“I would use other platforms more, but I couldn't say which ones. It's been a long time since I had a paid sports subscription and that was tied to my broadband package - which I definitely DON'T want. I don't know if that has changed. I would probably consume less sports content online, overall, but for big events like world championships I might just use pay per view or something to still be able to watch those.” - Male 24-34*

- *I would be devastated if this source was not available anymore as I would lose access to a wide range of sports that are not available on mainstream sources, such as BT Sports. I would feel out of touch with sport in general if I could not watch foreign leagues and key highlights, especially from American sports. I would have to rely on the mainstream ways of watching sports, but this would not give the same type of access.” Female, 25-34*

- *“I would be extremely frustrated if I could no longer access free live sports online as these give me a great amount of enjoyment. If I couldn't access sports in this way I would have to use more paid for services, such as BT Sports and explore paying one off fees for games/matches. Yes, I would look for some of the similar content, but some content would probably be platform specific and the more obscure sports aren't necessarily streamed/hosted on many sites/platform providers.” Male – 35-44*

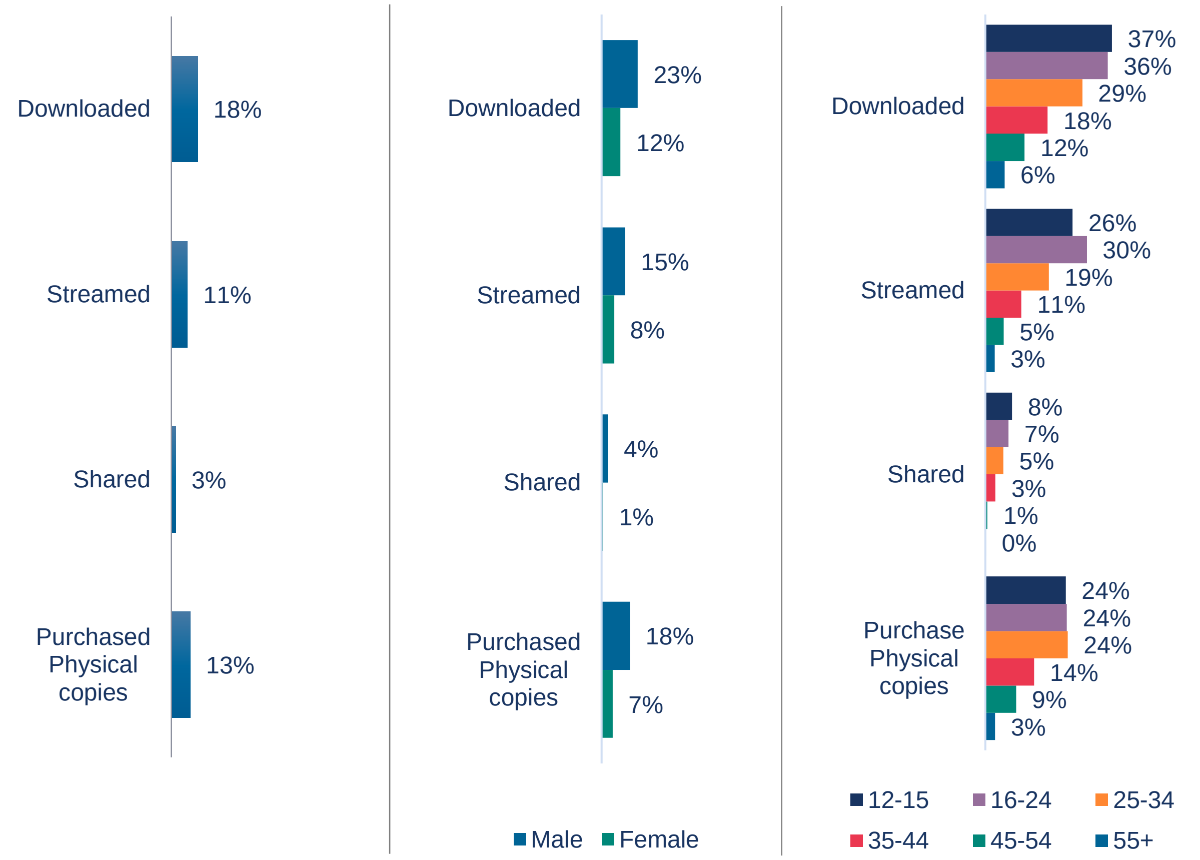
Video Games

Engaging with video games

26% 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 (18%).
- Purchasing video games in **physical formats was also common**, relative to other categories, with 13% having bought them.
- **Men and young people** were more engaged with video games. Most notably, around 3 in 10 or more 12-34-year olds had downloaded video games in the previous 3 months and a quarter had purchased via physical formats.

E1. Have you downloaded/streamed/shared[10]/purchased physical copies of Video Games in the past 3 months?



Base: 2019 n = 5,014 (total sample)

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.

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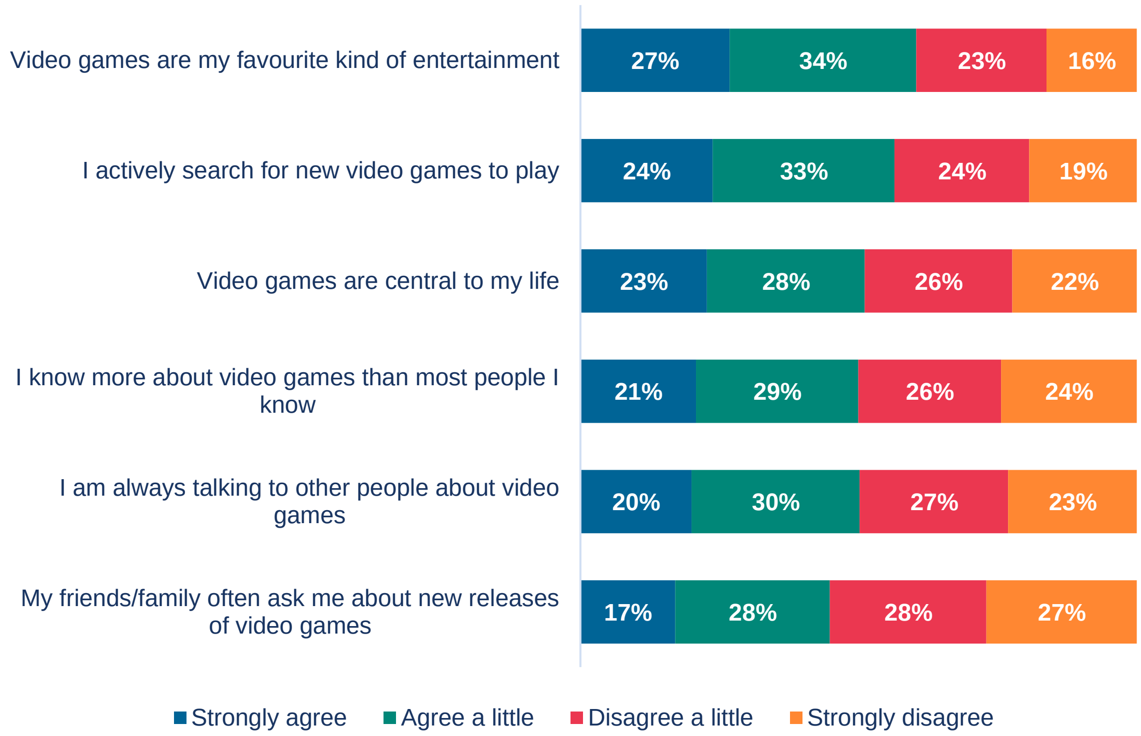
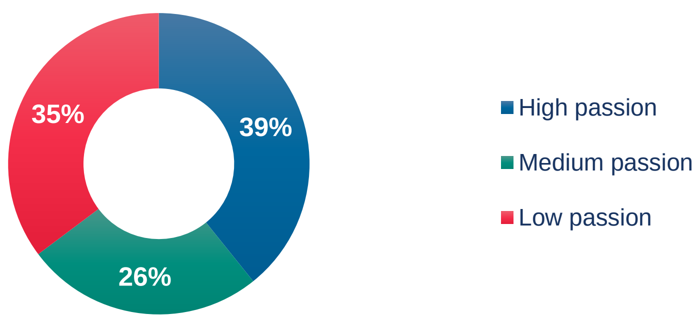
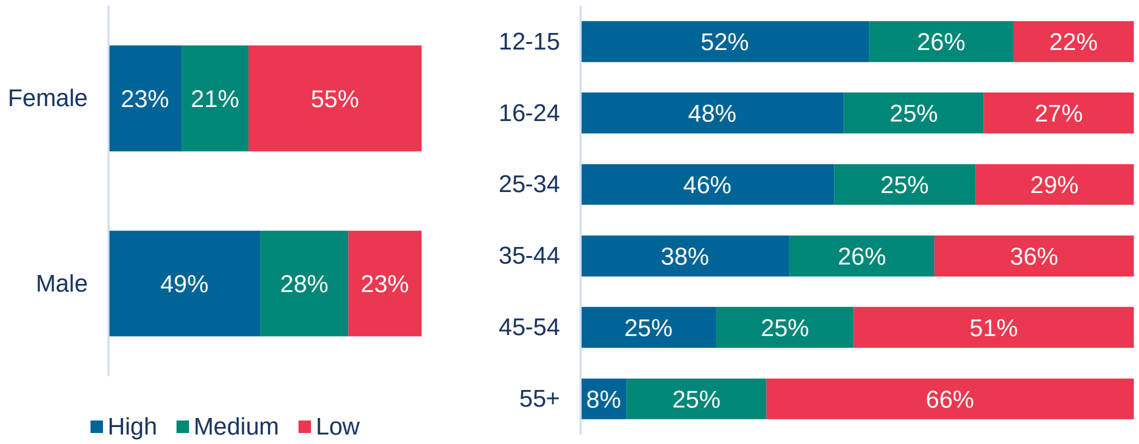
[10] The definition of 'shared' given was: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in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

- Four in ten (39%) displayed a **high passion** for video games.
- Those with a high passion for video games were more likely to be male (49%) and to be younger (at least 46% of those aged between 12-34.)
- Looking at individual statements, **discovery** emerged as an important factor, with 57% saying that they “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: 1,370 (downloaded, streamed, shared and/or purchased physical copies of TV video games in the past 3 months)

Qualitative insights

While there was a sense that, unlike many other forms of entertainment, video games demand active engagement and participation, many find ways to integrate them into various parts of their daily routine. Traditional gaming consoles like Xbox tend to be reserved for longer gaming sessions (e.g. after work or at weekends), while the ubiquity of digital devices allows video games to be played throughout the day. For example, during lunch breaks, or while on public transport. Importantly, these shorter bursts often act as a distraction from the stresses of daily activities. A few also mentioned enjoying the competitive aspects of games, being able to connect with other players and the escapist elements that enable them to enter a fantasy world that is disconnected from their daily life.

- *"I like to play iPhone games on my lunch break, usually for 10 minutes. If I am ever waiting around for something I may quickly play a game." - Female 25-34*

- *"I will sporadically play for 45-60 minutes on my console just after I get up. This would generally be one off matches against an online opponent on games such as FIFA." - Male 25-34*

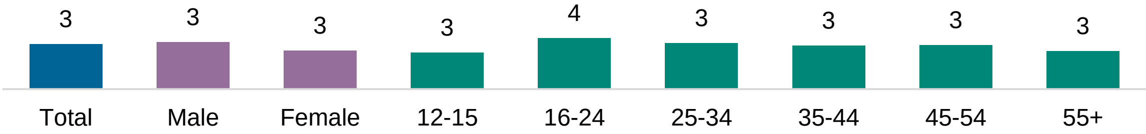
- *"I couldn't live without video games. I love competition and escaping into a video game and being someone or something else." Male, 45-54*

Physical purchasing of video games

Respondents were asked about purchasing video games in physical formats, focusing on 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 three purchases a month for all but the 16-24 age group (who made four purchases a month).

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



Base: 560 (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 **cost** (48% “it’s free or cheap”), **convenience and ease of access** (47% “being able to play video games instantly whenever I want”) and there being a **wide range** available (46% “having a wide range of video games to play”.)
- Cost appeared to be even more of a driver for women, with 59% selecting “it’s free or cheap”, compared to 41% 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: 1,121 (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 (48%) 2. Being able to play video games instantly whenever I want (45%) 3. It's free or cheap (41%)	1. It's free or cheap (59%) 2. Being able to play video games instantly whenever I want (52%) 3. Having a wide range of video games to play (43%)
Aged 12-15	**Aged 16-24**
1. Being able to play video games instantly whenever I want (53%) 2. It's free or cheap (51%) 3. Having a wide range of video games to play (50%)	1. Having a wide range of video games to play (46%) 2. Being able to play video games instantly whenever I want (45%) 3. It's free or cheap (39%)
Aged 25-34	**Aged 35-44**
1. Being able to play video games instantly whenever I want (44%) 2. It's free or cheap (41%) 3. Having a wide range of video games to play (39%)	1. It's free or cheap (51%) 2. Having a wide range of video games to play (51%) 3. Being able to play video games instantly whenever I want (42%)
Aged 45-54	**Aged 55+**
1. Having a wide range of video games to play (54%) 2. It's free or cheap (52%) 3. Being able to play video games instantly whenever I want (49%)	1. It's free or cheap (68%) 2. Being able to play video games instantly whenever I want (58%) 3. Getting value for money (50%)

Qualitative insights

Interestingly, unlike content categories such as music and film/TV, the internet does not appear to have radically reshaped consumption habits for gamers. More so, the process of accessing games appears to have become easier.

There does, however, appear to have been a significant (positive) change in the communal and social aspects of video games. The ability to compete against other players online and the popularity of YouTube video game blogs are credited for this.

- *"Internet access and games being online means that it opens it up to 24-hour access. There is always a range of players and competitors which makes it more of a social event and gives more of a community feel." - Male 25-34*

- *"The best thing about video games being online is the speed to access them and to download a new game you fancy trying." - Female 25-34*

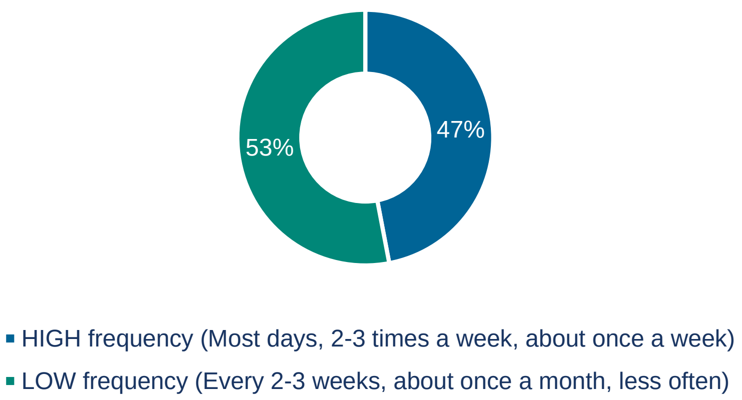
Accessing video games online

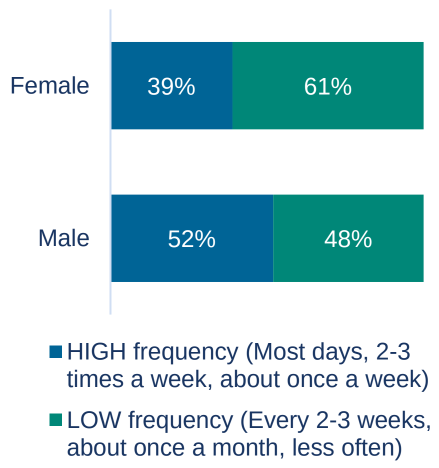
The 18% who had accessed video games online during the previous 3 months were asked more questions around frequency, volume and sources used.

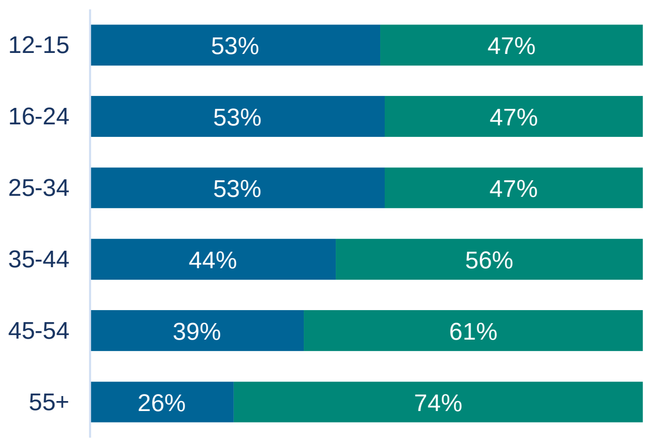
Frequency and volume of accessing video games

- Broadly, there was a **50/50 split** between those who access video games online weekly (47%) vs. less often (53%).
- Weekly access was more common among men than women, and those aged 12-34 compared to older groups.
- On average, respondents accessed 19 video games online every 3 months. Volume was higher for men (23 games) and those aged 16-24 (28 games).

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

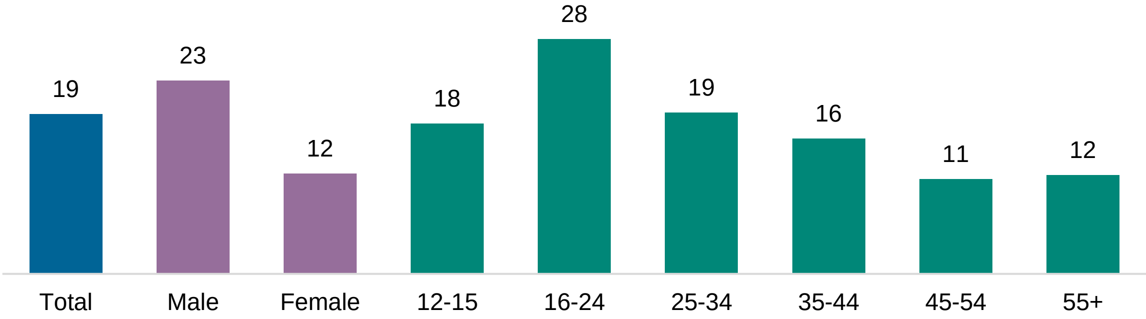






Base: 1,121 (downloaded or streamed/accessed video games in the past 3 months)

E6. In the past 3 months how many Video Games have you downloaded/streamed through the internet? (average number of downloads)



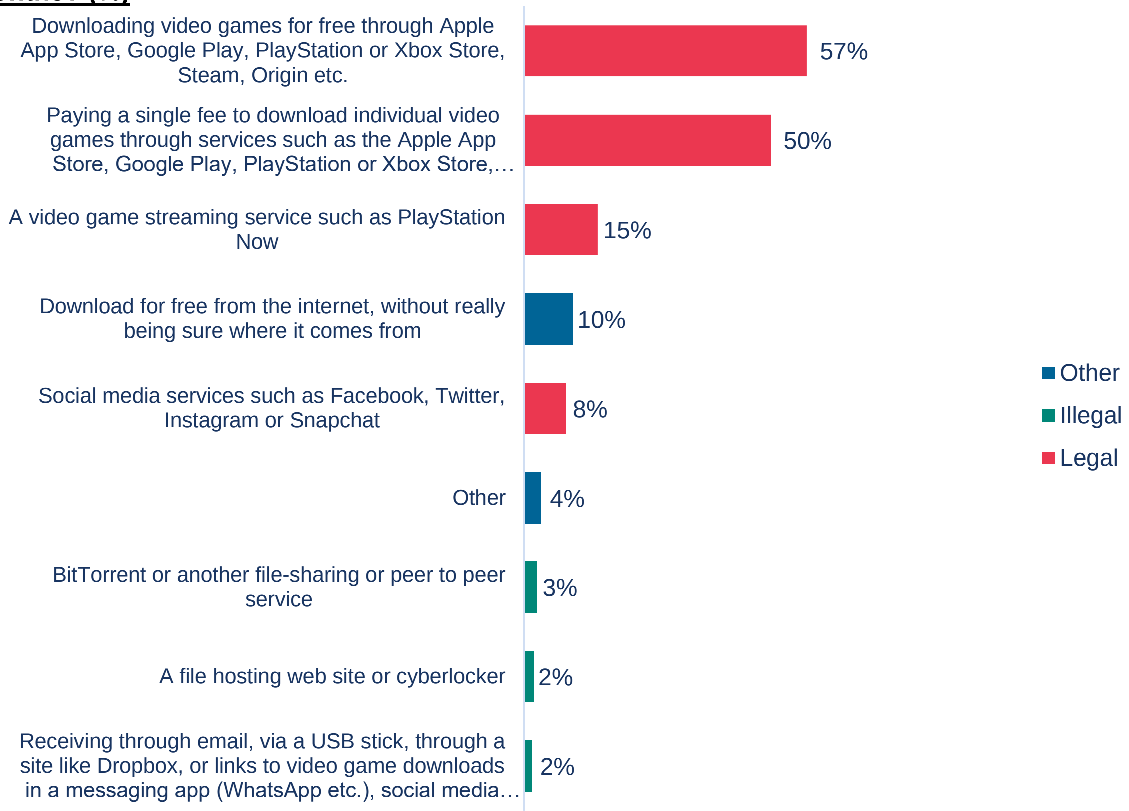
Base: 1,084 (downloaded/streamed video games in the past 3 months)

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 saw the largest use were both legal**, with one being free (57% “'Downloading video games for free through Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin”) and one being paid for (50% “'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”).
- No illegal sources were selected by more than 3% of online video gamers.
- Although overall just a small proportion (4%) were unsure of the exact source used, over a quarter (27%) of those aged 55+ selected this.

E7. 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.	59%	35%	46%	66%	63%	40%	40%	20%
Downloading video games for free through Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc.	55%	61%	61%	62%	54%	58%	55%	54%
A video game streaming service such as PlayStation Now	16%	12%	17%	14%	18%	16%	12%	10%
Social media services such as Facebook, Twitter, Instagram or Snapchat	6%	13%	12%	5%	7%	11%	12%	9%
A file hosting web site or cyberlocker	3%	1%	3%	3%	3%	1%	0%	0%
BitTorrent or another file-sharing or peer to peer service	4%	1%	1%	3%	3%	4%	1%	4%
Receiving through email, via a USB stick, through a site like Dropbox, or links to video game downloads in a messaging app (WhatsApp etc.), social media or on a forum online	2%	1%	2%	2%	2%	2%	1%	1%
Download for free from the internet, without really being sure where it comes from	9%	11%	8%	6%	7%	12%	7%	27%
Other	3%	5%	1%	3%	2%	5%	5%	8%

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

Base: 1,121 (downloaded/streamed video games during the past 3 months)

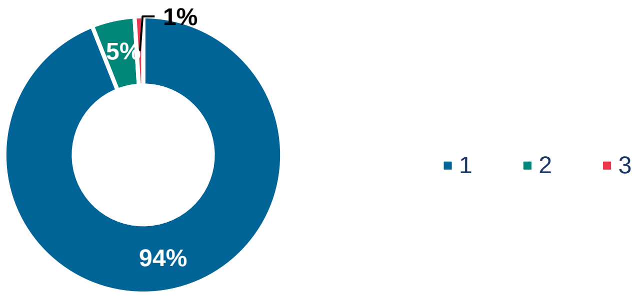
Legality of accessing video games online

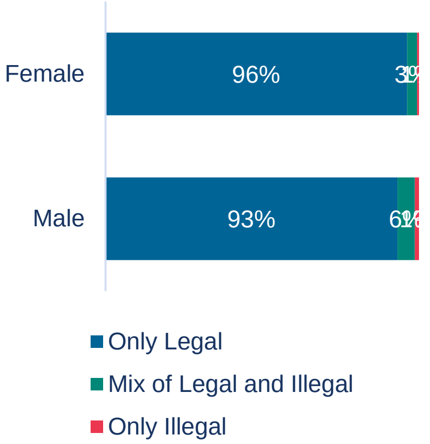
To better understand the distribution of sources across legal and illegal categories, those who had accessed video games online in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

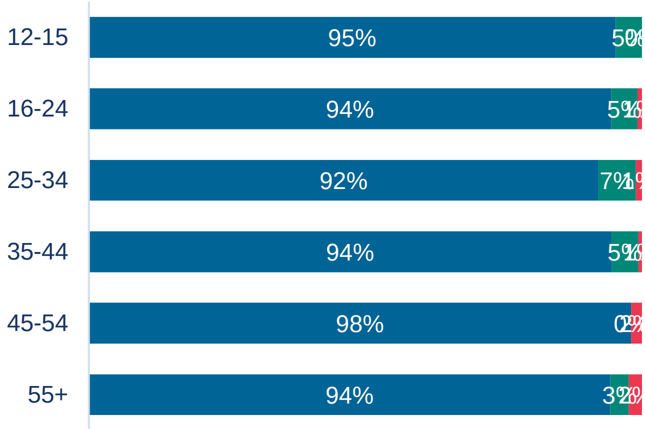
The answer option "download for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

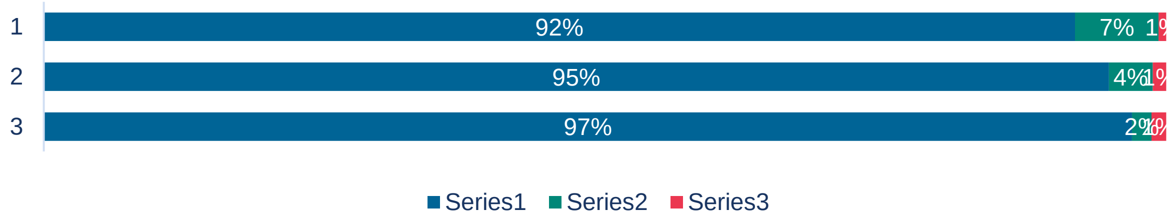
- Legal:
  - 99% had used at least one legal method to access video games online
  - **94%** had used only legal sources to access video games online
- Illegal:
  - **6%** had used at least one illegal source to access video games online
  - 1% had used only illegal sources to access video games online.

- Mixed:
  - **5%** had used a mix of legal and illegal sources
  - Use of both legal and illegal sources was slightly higher among those aged 25-34 (7%)









Base: 1,033 (downloaded/streamed video games in the past 3 months, with those who selected ‘other’ or ‘not sure of source’ removed)

E8. 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	Downloading video games for free through Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc.	40%	7
	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	37%	8
	A video game streaming service such as PlayStation Now	7%	1
	Social media services such as Facebook, Twitter, Instagram or Snapchat	4%	1
Illegal	BitTorrent or another file-sharing or peer to peer service	1%	11
	A file hosting web site or cyberlocker	1%	0
	Receiving through email, via a USB stick, through a site like Dropbox, or links to video game downloads in a messaging app (WhatsApp etc.), social media or on a forum online	1%	0
Other	Download for free from the internet, without really being sure where it comes from	6%	1
	Other	3%	0

Base: 1,084 (downloaded/streamed video games in the past 3 months)

Qualitative insights

Encouragingly, very few seemed comfortable with the prospect of illegally downloading video games, fearing viruses would be a likely consequence of using unofficial download links. Even those who had previously downloaded video games from unofficial or illegal sources remained wary of unverified sources, often relying on trusted friends to provide them with a free download link or USB drive.

Along with improving the ease and accessibility of video games, both smartphones and the internet have provided many users with a satisfactory selection of free, legal, games via sources such as the Apple App Store, the Google Play Store and addictinggames.com. The success of these platforms, and their large selection of free games, seems to have reduced the need to find unofficial or illegal channels.

- *“I have no idea how I would be able to access a video game online without using any of the official stores. Personally, I would be quite apprehensive to use links or websites that are not 'official' just in case it's illegal to download for free. I would probably rely on my friends to figure this issue out for me and to advise me where to get free games online.” - Male 25-34*

- *“I do not know how to go about finding free files. This is because if it is not available through the usual channels, I would not risk downloading files from suspect sites such as uTorrent as they are well known to come with a ton of marketing emails and the potential risk of adware or viruses.” - Male 25-34*

- *“I would say that I rely on my friends to provide me with links to access video games online - unless I want to personally purchase these for myself, in which case I would buy them.” - Male 25-34*

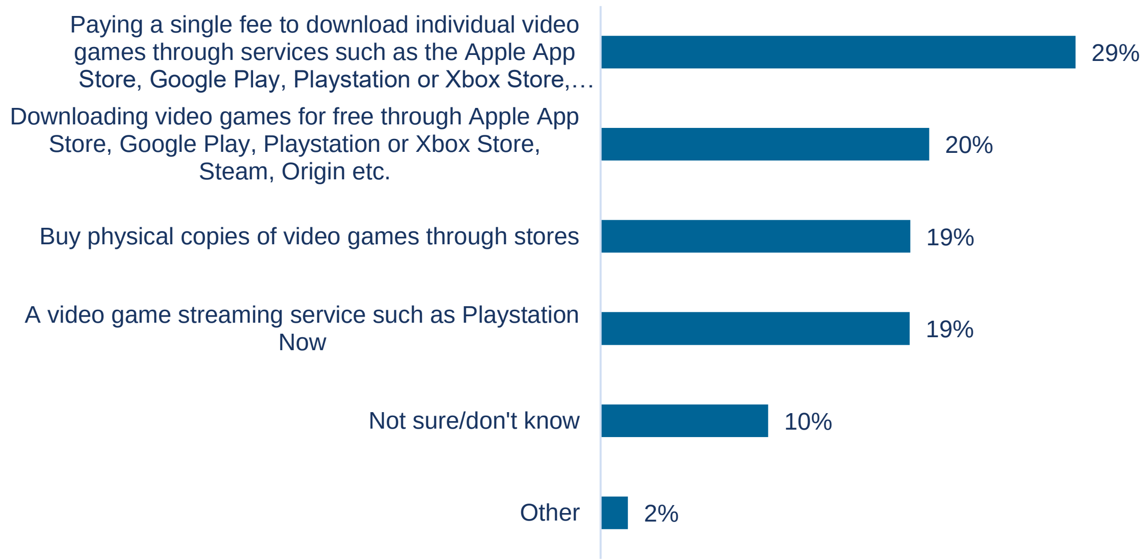
- *“The only free games that I access are the ‘download app’ kind of games that come from officially sourced locations and come with in-game purchases. I tend not to use sites such as BitTorrent and Pirate bay for video games because I feel these sites expose my devices to over intrusive adware, spyware and viruses, and the inconvenience of this infecting my devices would outweigh any benefits of a free game.” - Male 25-34*

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.

- *Given the small sample size (N=58), these results should be viewed with caution.*
- The dominant theme was that **official (paid or free) online market places** would be used.

E9. 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+
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.	34%	15%	14%	21%	45%	35%	0%	17%
Downloading video games for free through Apple App Store, Google Play, Playstation or Xbox Store, Steam, Origin etc.	23%	13%	24%	14%	15%	32%	0%	41%
A video game streaming service such as Playstation Now	16%	28%	25%	28%	21%	12%	0%	0%
Buy physical copies of video games through stores	18%	22%	13%	29%	10%	22%	0%	42%
Other	0%	7%	0%	0%	5%	0%	0%	0%
Not sure/Don't know	9%	15%	25%	8%	5%	0%	100%	0%

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

Base: 58 (downloaded and/or streamed video games illegally)

Qualitative insights

Given the strong preference for official sources, few would gamers would be impacted by illegal sources no longer being available.

Of those who would be affected, some felt that they would be likely to consume less video games overall, as they migrated to accessing cheap games via official providers. However, many mentioned that, with so many free games available via official providers, their volume of consumption would be unchanged.

- *"If I could no longer access games which I find from unofficial sources, I would search other methods which are easily accessible and cheap. I would probably use less content as it would be more time consuming" - Female 25-34*

- *"So, by removing this [download links from friends], I think it would result in people either having to directly pay to purchase video games online or a drop in people actually playing them, particularly those who are not willing to pay a fair price to access them." - Male 25-34*

- *"I would feel a lot happier accessing games legally. Whenever I have accessed a game illegally I have ended up uninstalling it as I felt guilty and worried I would get found out. Since having had a virus on my mac this year I am worried about viruses so want to only download games from reputable sources. As there are so many indie games on the app store and the console networks now I feel I can access plenty of games to satisfy my needs without needing the other sites. I would miss being about to have free games off my friends as I do not have much money to spend on games but feel that morally this is the right thing to do. However, there are plenty of free games on the app store" Female, 25-34*

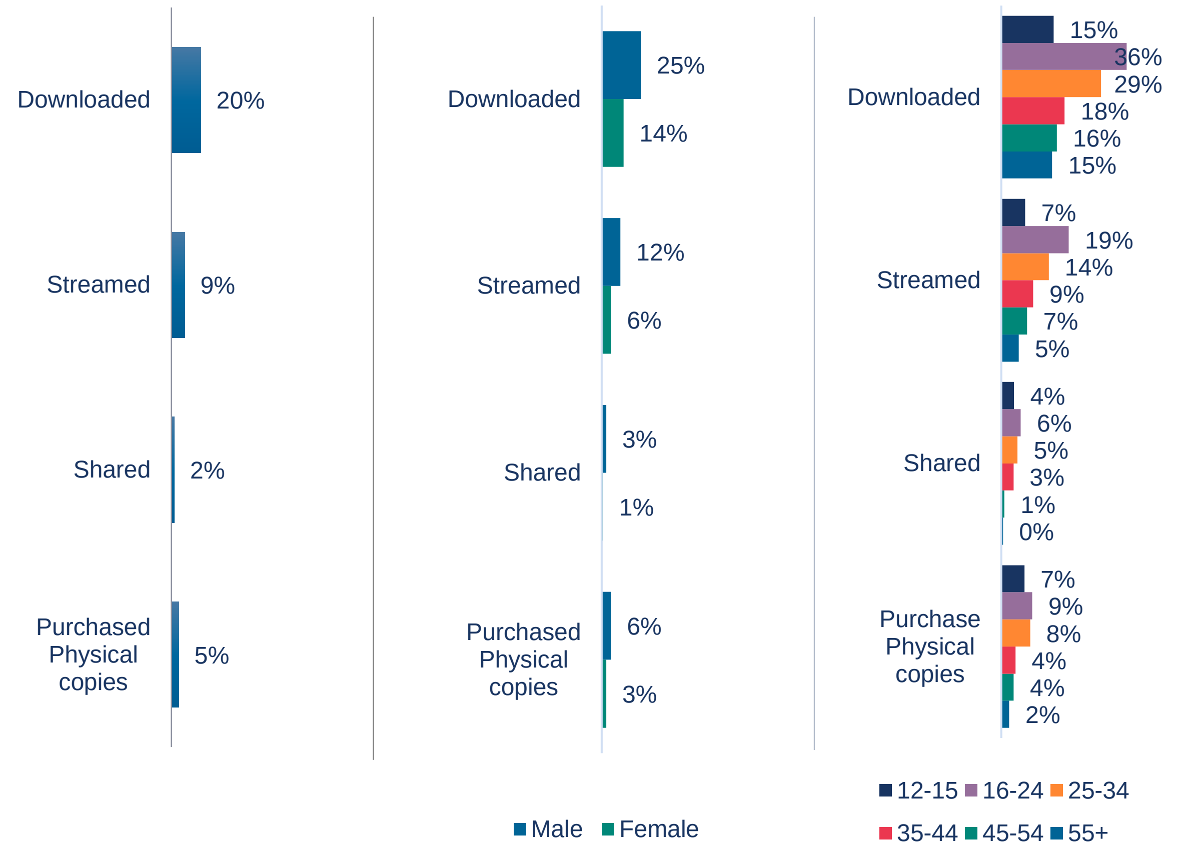
Software

Engaging with software

A quarter (25%) had engaged with software in the previous 3 months (i.e. either by downloading, streaming, sharing or purchasing physical copies).

- **Downloading was the most common method** of accessing software, with 20% having done so. This was followed by 9% who had streamed software online.
- Those aged **16-34** were most engaged with software, for both downloading and streaming online.

F1. Have you downloaded/streamed/shared[11]/purchased physical copies of software in the past 3 months?



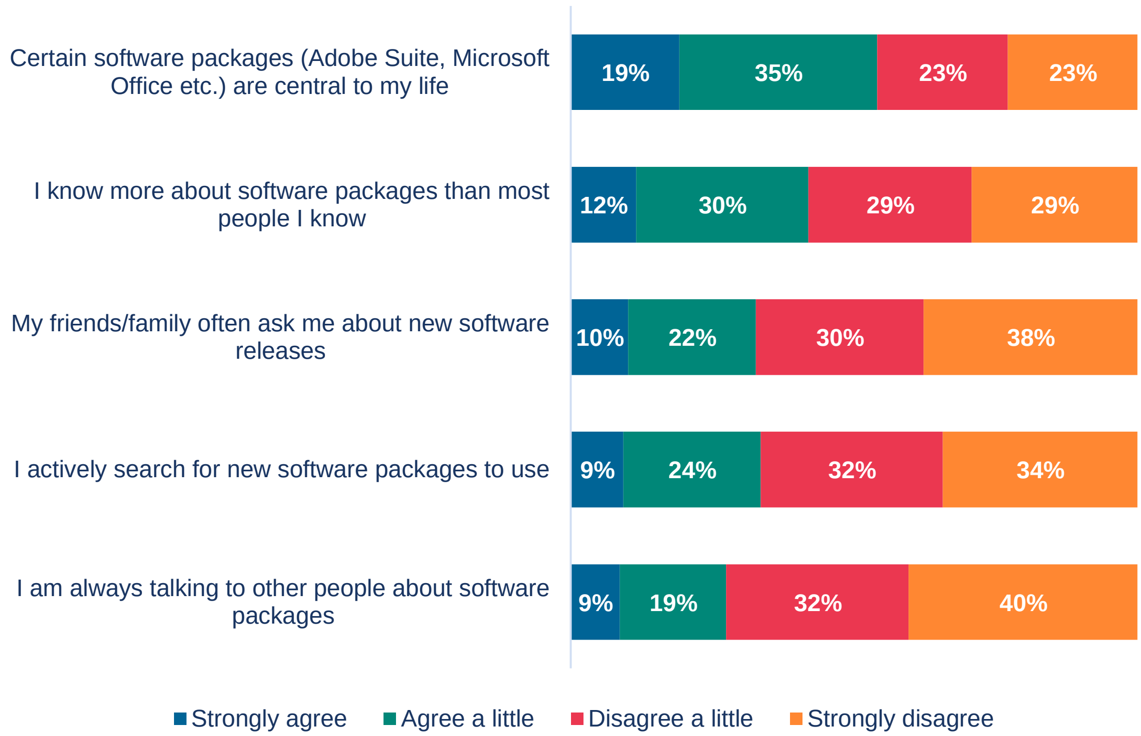
Base: 2019 n = 5,014 (total sample)

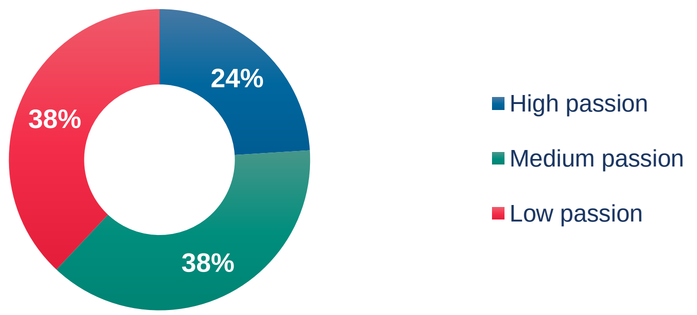
To get a broader sense of **their passion for software**, respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

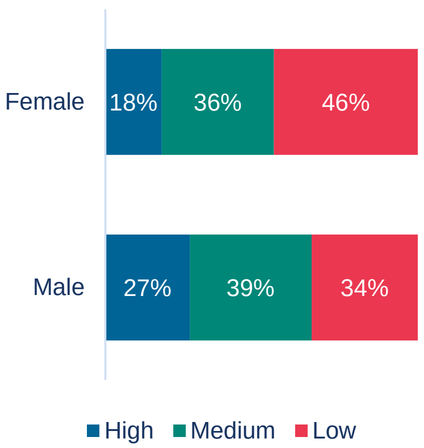
[11] The definition of 'shared' given was: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in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

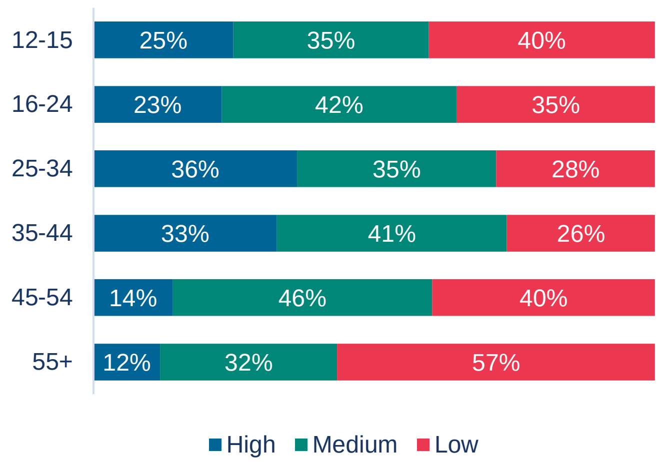
- Just a quarter (24%) displayed **high levels of passion for software**. This was, however, more evident in those aged between 25-44, where at least a third had high levels of passion.
- When looking at individual statements, accessing software appears to be more of a **day-to-day necessity** rather than a hobby. Just one statement was agreed with by more than half; 54% 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?









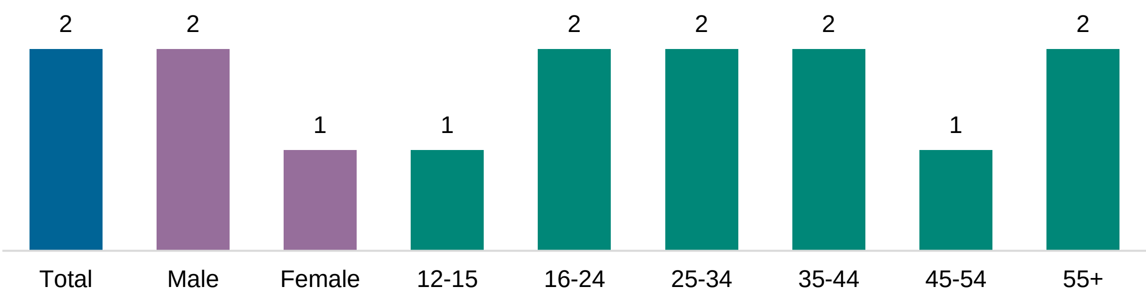
Base: 1,258 (downloaded, streamed, shared and/or purchased physical copies of software in the past 3 months)

Physical purchasing of software

Respondents were asked about purchasing software in physical formats, focusing on frequency and number of purchases made.

- The number of software packages respondents had purchased in physical form was, compared to other categories, 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? (Average purchases)



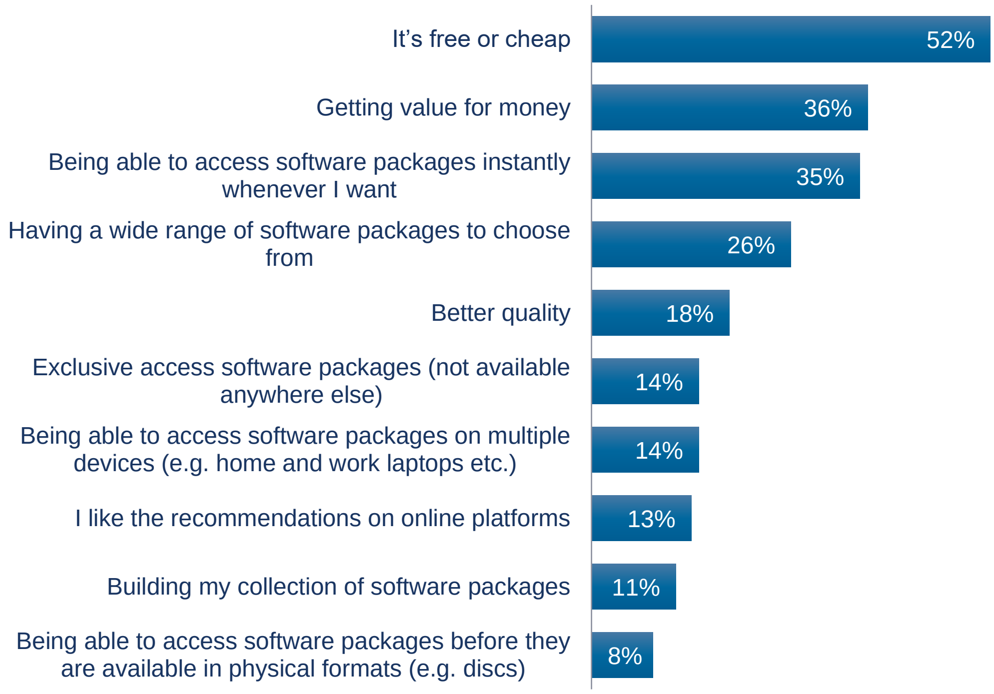
Base: 162 (purchased physical software packages in the past 3 months)

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 more than half of respondents was "It's free or cheap", with "Getting value for money" also selected by a relatively high proportion (36%).
- 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" (35%).

F4. What are the main reasons that you choose to access software packages online (i.e. downloading or streaming/accessing)? Please select your top 3. (%)



Base: 1,161 (downloaded or streamed software online in the past 3 months)

Male respondents	**Female respondents**
1. It's free or cheap (53%) 2. Getting value for money (39%) 3. Being able to access software packages instantly whenever I want (35%)	1. It's free or cheap (52%) 2. Being able to access software packages instantly whenever I want (35%) 3. Getting value for money (31%)

Aged 12-15	**Aged 16-24**
1. It's free or cheap (51%) 2. Being able to access software packages on multiple devices (e.g. home and work laptops etc.) (31%) 3. Getting value for money (31%)	1. It's free or cheap (52%) 2. Being able to access software packages instantly whenever I want (37%) 3. Getting value for money (36%)

Aged 25-34	Aged 35-44
1. It's free or cheap (46%) 2. Getting value for money (37%) 3. Having a wide range of software packages to choose from (30%)	1. It's free or cheap (48%) 2. Getting value for money (34%) 3. Being able to access software packages instantly whenever I want (33%)
Aged 45-54	**Aged 55+**
1. It's free or cheap (50%) 2. Being able to access software packages instantly whenever I want (40%) 3. Getting value for money (36%)	1. It's free or cheap (64%) 2. Being able to access software packages instantly whenever I want (38%) 3. Getting value for money (36%)

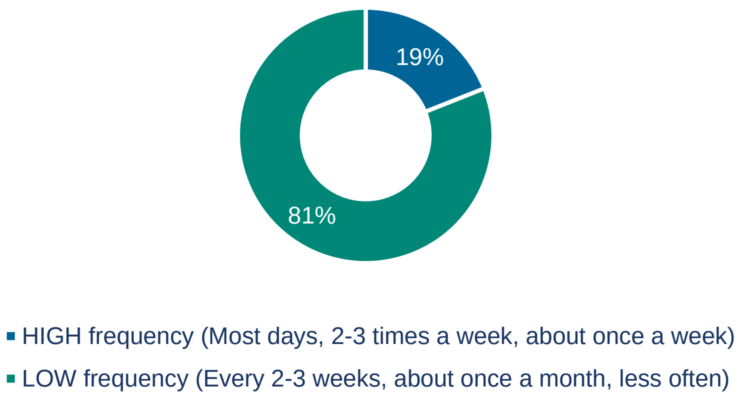
Downloading and streaming software

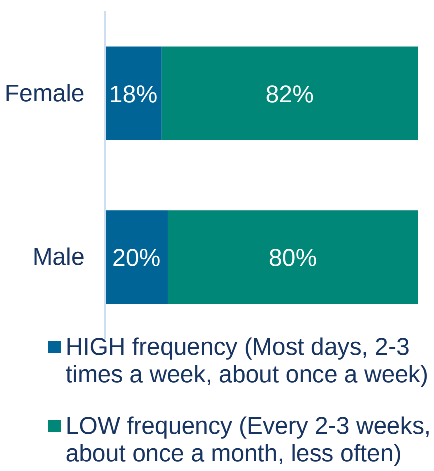
The 20% who had downloaded software during the previous 3 months were asked more questions around frequency, volume and sources used.

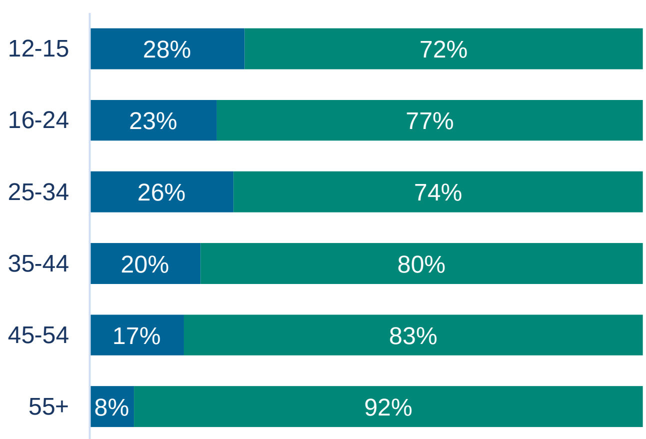
Frequency and volume of downloading software

- One in five (19%) of those who downloaded software did so frequently (i.e. at least once a week).
- Respondents downloaded, on average, 7 software packages every 3 months.
- Downloading was more prevalent among those aged **16-24** (12 downloads).

F5. Generally, how often do you download or stream/access software packages through the internet? (%)

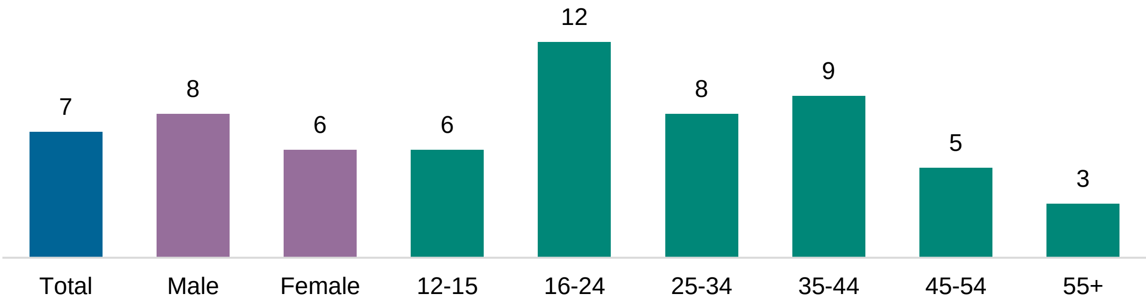






Base: 1,161 (downloaded/streamed software packages in the past 3 months)

F6. In the past 3 months, how many software packages have you downloaded/streamed through the internet? (average number of downloads)



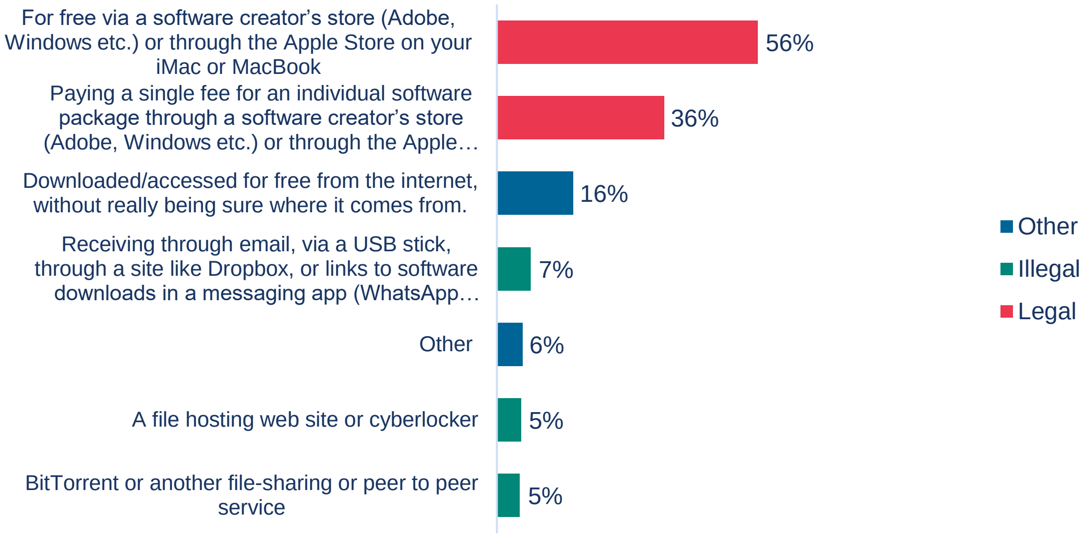
Base: 1,151 (downloaded software in the past 3 months)

Sources of downloading software

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 half (56%).
- This was followed by just over a third (36%) 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 through email, via a USB stick, through a site like Dropbox, or links to software downloads in a messaging app” (7%), with the other two methods (“A file hosting website or cyberlocker” and “BitTorrent or another file-sharing or peer to peer service) just behind at 5% (respectively).
- A very notable proportion were unsure of the exact source of where their downloads come from (16%). This was most evident in the oldest age group (29% of 55+).

F7. Which of the following have you used to download or stream/access software in the past 3 months? (%)



Base: 1,161 (downloaded software during the past 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	57%	56%	57%	58%	55%	59%	53%	57%
Paying 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	40%	31%	29%	44%	48%	37%	33%	22%
Downloaded/accessed for free from the internet, without really being sure where it comes from.	16%	17%	10%	12%	10%	14%	17%	29%
Receiving through email, via a USB stick, through a site like Dropbox, or links to software downloads in a messaging app (WhatsApp etc.), social media or on a forum online	5%	11%	10%	5%	6%	8%	8%	8%
Other	6%	5%	7%	6%	5%	5%	5%	6%
A file hosting web site or cyberlocker	6%	4%	10%	9%	5%	8%	3%	2%
BitTorrent or another file-sharing or peer to peer service	6%	3%	3%	7%	6%	6%	3%	3%

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

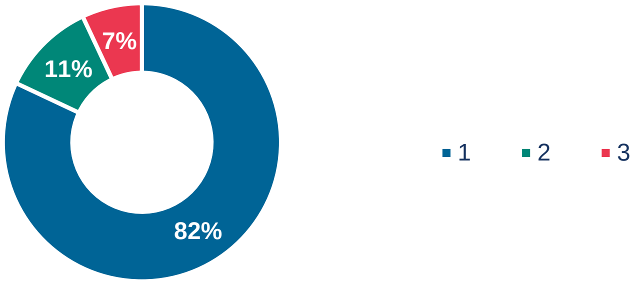
Base: 1,161 (downloaded software during the past 3 months)

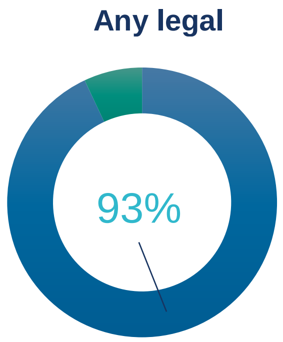
Legality of software downloads

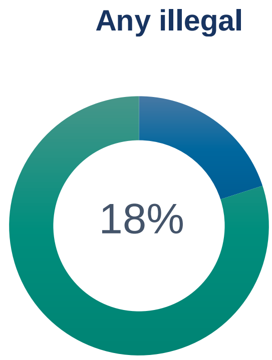
To better understand the distribution of sources across legal and illegal categories, those who had downloaded software in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

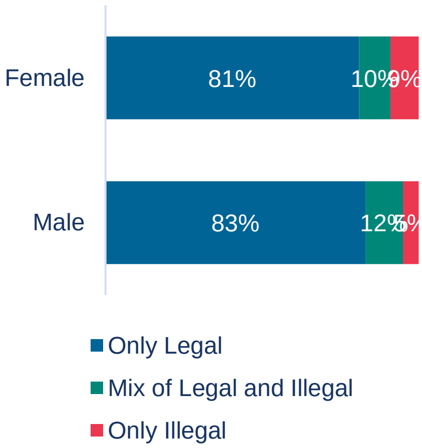
The answer option “downloaded/accessed for free from the internet, without really being sure where it comes from” was not included in the definition of either legal or illegal. Anyone who said they *only* consumed content this way was not included in the base.

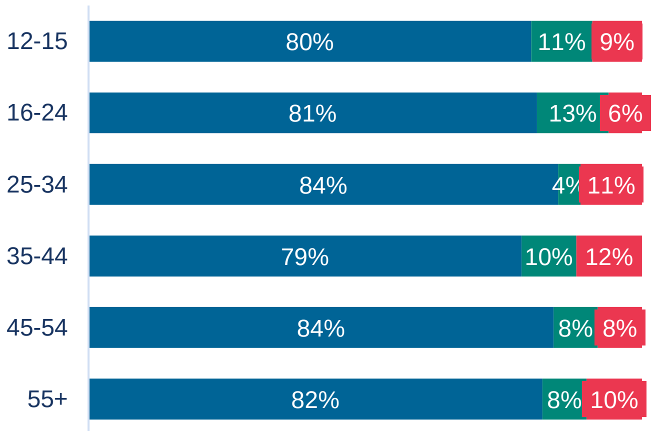
- Legal:
  - 93% had used at least one legal source to download software.
  - 82% had used only legal sources to download software.
- Illegal:
  - 18% had used at least one illegal source to download software.
  - 7% had used only illegal sources to download software.
- Mixed:
  - 11% had used a mix of legal and illegal sources to download software.

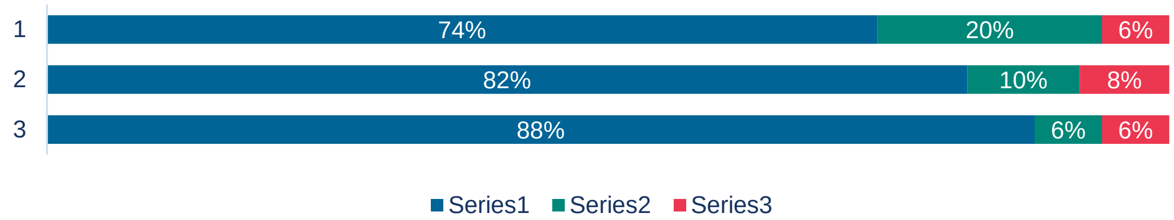












Base: 997 (downloaded software in the past 3 months with those who selected 'other' or 'not sure of source' removed).

F8. And how is the way you download or stream/access software typically split across the following sources?

Legality	Source	Average % of usage split	Average downloads
Legal	For free via a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	45%	2
	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	28%	3
Illegal	Receiving through email, via a USB stick, through a site like Dropbox, or links to software downloads in a messaging app (WhatsApp etc.), social media or on a forum online	4%	0
	A file hosting web site or cyberlocker	3%	1
	BitTorrent or another file-sharing or peer to peer service	3%	0
Other	Downloaded/accessed for free from the internet, without really being sure where it comes from.	12%	0
	Other	5%	0

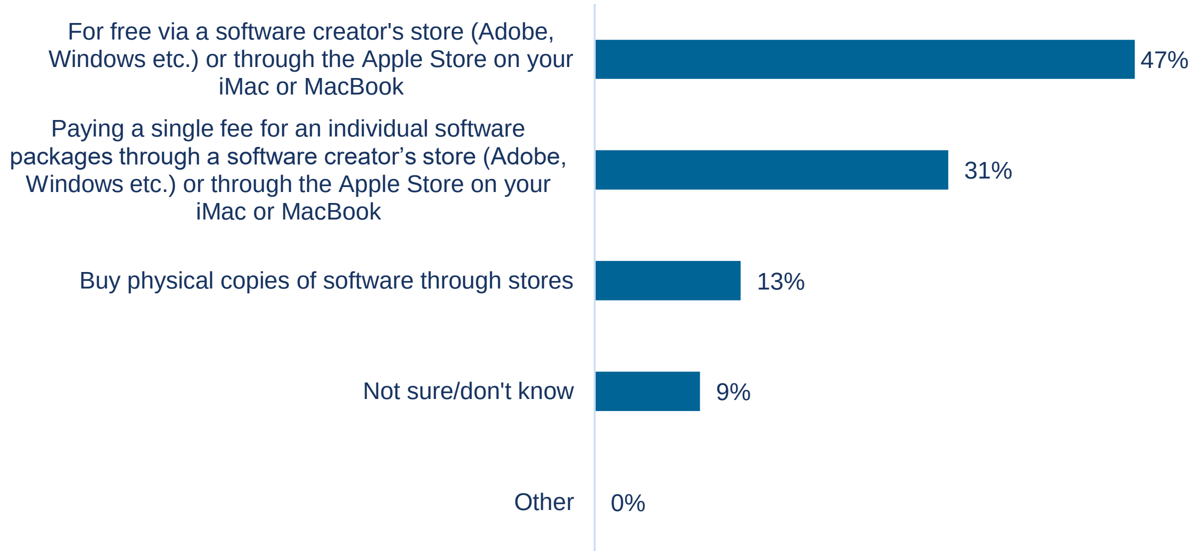
Base: 1,151 (downloaded software in the past 3 months)

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 half (47%) selecting “For free via a software creator’s store or through the Apple Store on your iMac or MacBook”.
- There was an indication that some users would move onto paid options, with around a third (31%) 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”.

F9. 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	30%	31%	24%	39%	34%	30%	20%	29%
For free via a software creator’s store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	47%	48%	30%	44%	36%	55%	55%	56%
Buy physical copies of software through stores	11%	15%	23%	12%	21%	6%	20%	3%
Other	0%	0%	0%	0%	0%	0%	0%	0%
Not sure/don’t know	12%	5%	23%	5%	8%	9%	5%	12%

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

Base: 177 (downloaded software illegally)

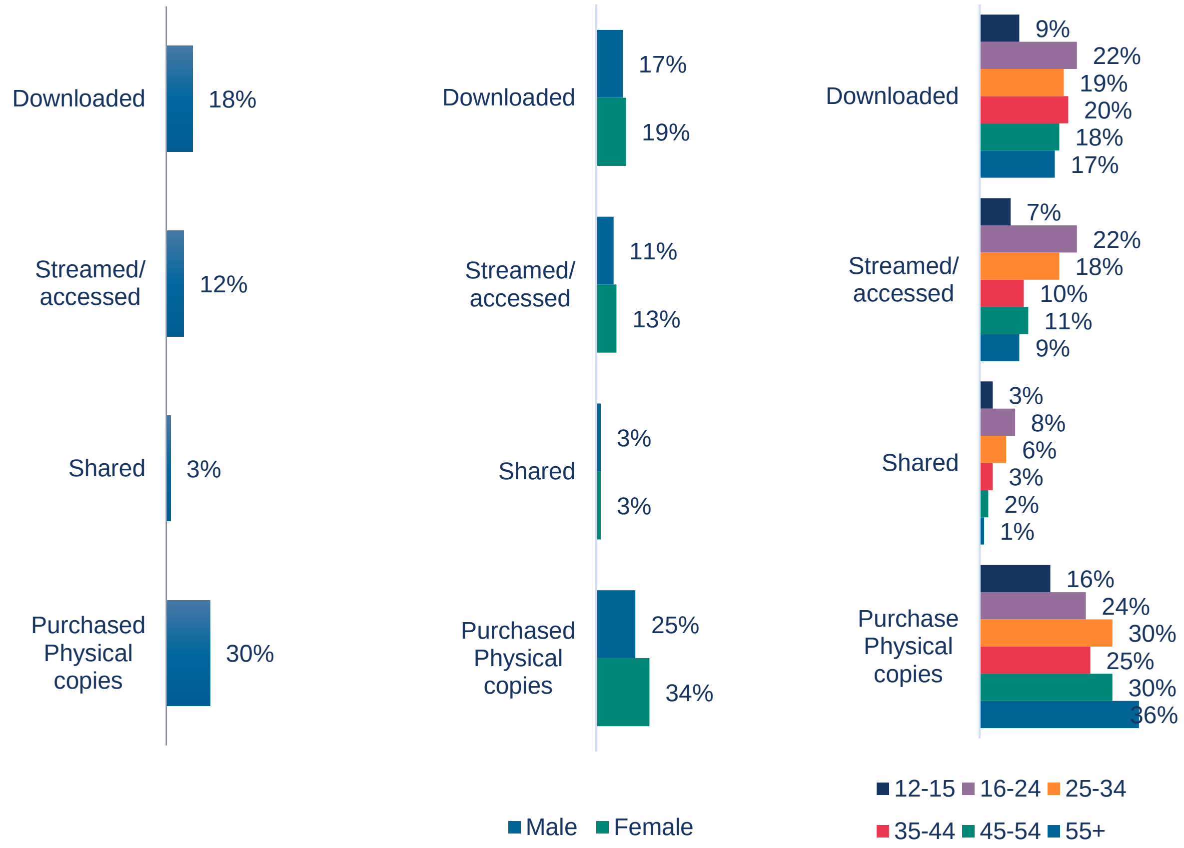
E-Publishing

Engaging with e-publishing

23% had engaged with publications in the previous 3 months (either by downloading, streaming or sharing e-publications, or purchasing physical copies).

- In contrast to other content categories, the **most common method of access was purchasing physical copies** (30%).
- This was followed by downloading (18%) and then streaming/accessing online (12%).

G1. Have you downloaded/streamed/shared[12] any e-publications or purchased physical copies of any publications in the past 3 months?



Base: 2019 n = 5,014 (total sample)

To get a broader sense of **their passion for publications**, 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.

- Nearly four in ten (38%) displayed **high levels of passion for publications.**

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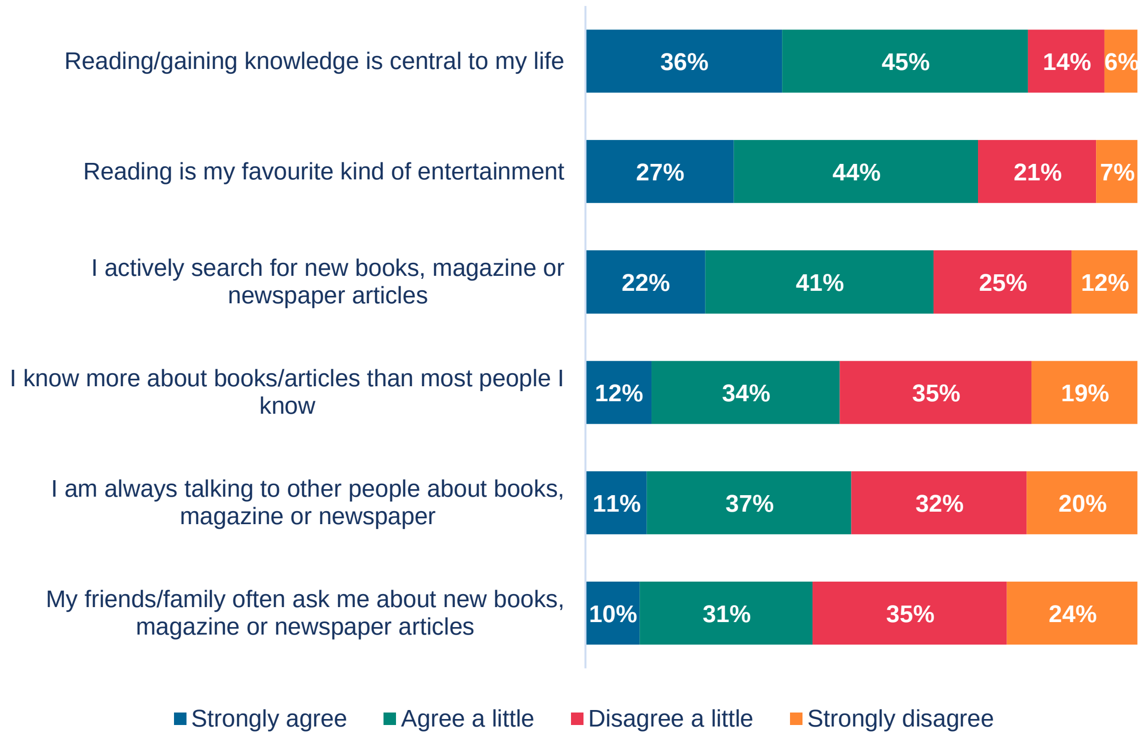
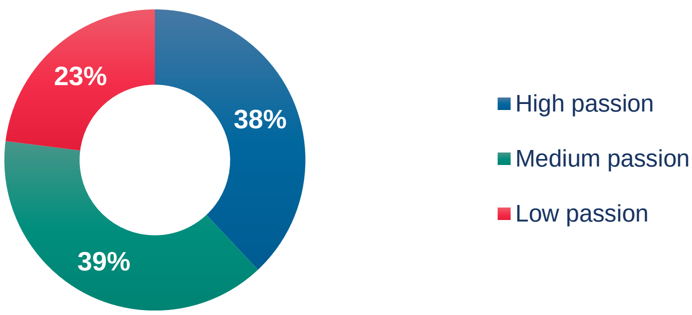
[12] The definition of 'shared' given was: *"By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated in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

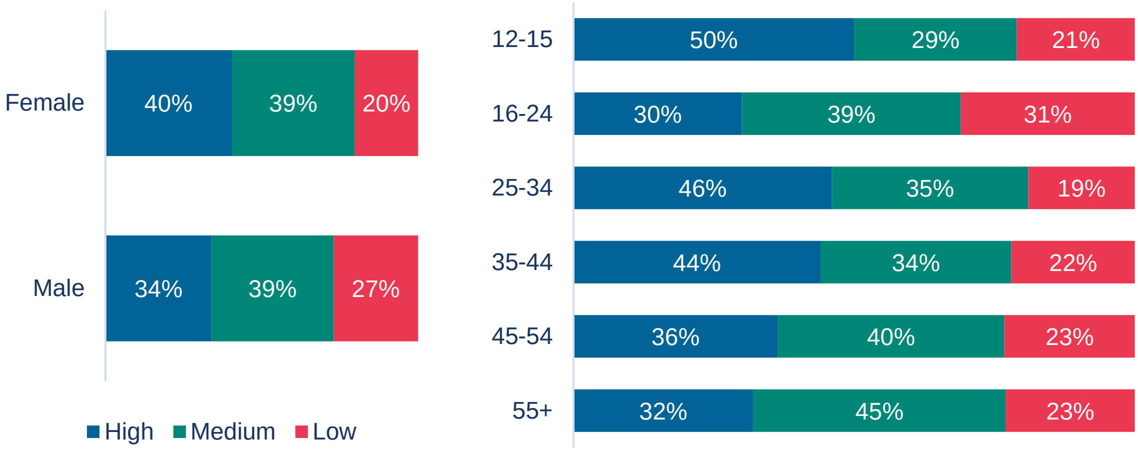
- Publications are valued as a form of **entertainment** (“Reading is my favourite kind of entertainment” 71%), as well as, importantly, a source of **knowledge and self-progression** (“Reading/gaining knowledge is central to my life” 81%).

- There are indications that this content category plays a particularly important role for many people, with 8 in 10 (81%) agreeing that “reading/gaining knowledge is central to my life”.

G2. To what extent do you agree or disagree that each of the following statements describe you?







Base: 1,180 (downloaded, streamed, shared and/or purchased physical copies publications in the past 3 months)

Qualitative insight

Qualitative discussions further highlighted the role that reading plays in offering mental stimulation and access to knowledge. When compared with other content categories, reading was considered a personal, often solitary, experience and was tied closely with personal and intellectual development.

The extent to which reading e-publications features in daily routines varied, largely depending on amount of free-time and passion for reading. For those who were more engaged, reading e-publications was a set part of their routine, often done while commuting, at work or in the evening.

- *"[I like] reading publications, because I can learn so much about the world from non-fiction, and fiction stimulates my imagination." Female, 45-54*

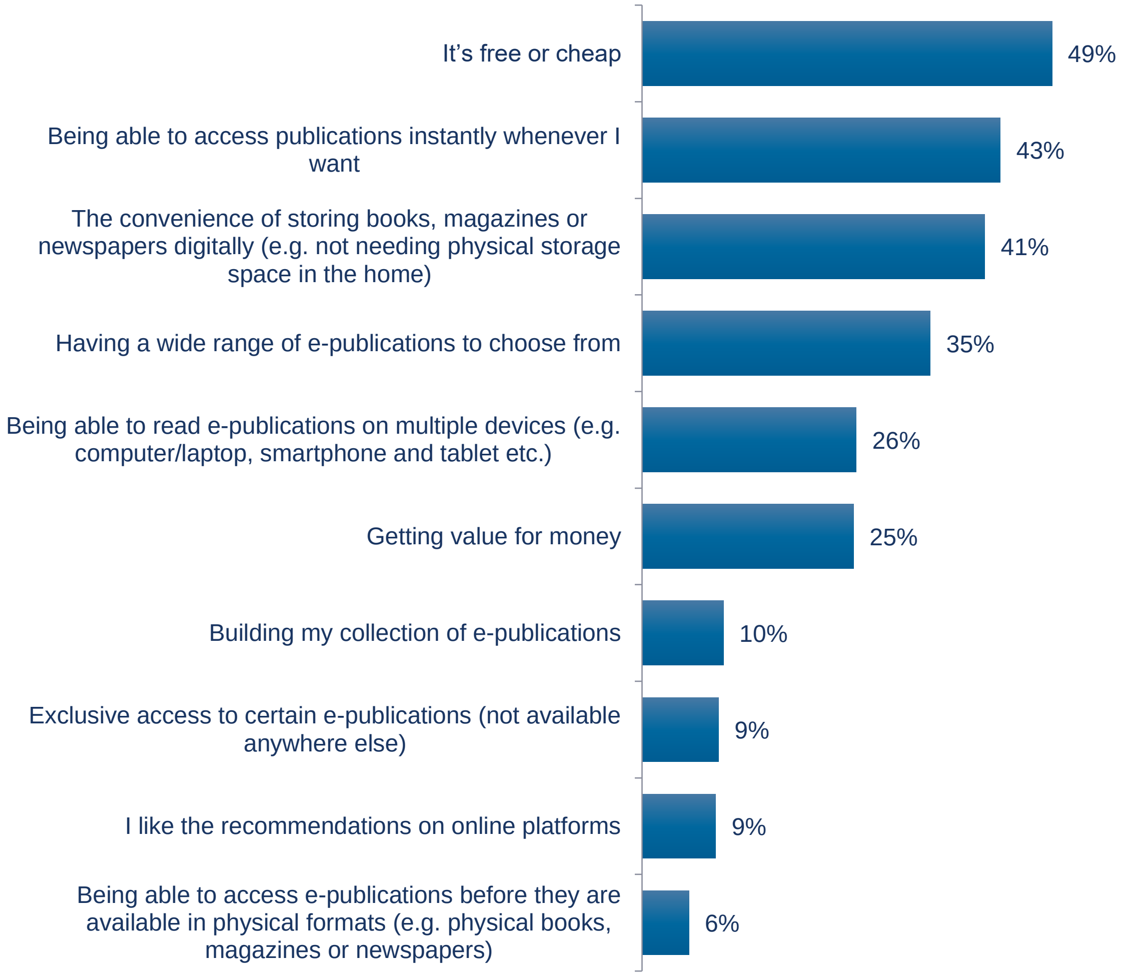
- *"[I like] reading because my brain needs to learn and to exercise. Work doesn't do anything for me, so I like to stretch myself with philosophy, theology and psychology. There's a lot more to this planet and the human brain than we know. I like to try and find the truth." Female 35-44*

Understanding online consumption of e-publishing

To better understand the drivers of online consumption, those who had accessed e-publications 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 (49%) accessing e-publications online because "It's free or cheap".
- Other prominent reasons related to the **convenience** of storing content digitally (41%) and, consequently, being able to **access** everything "whenever" they wanted (43%).

G3. What are the main reasons that you choose to access E-Publications online (i.e. downloading or streaming) Please select your top 3. (%)



Male respondents	Female respondents
1. It's free or cheap (49%) 2. Being able to access publications instantly whenever I want (39%) 3. The convenience of storing books, magazines or newspapers digitally (e.g. not needing physical storage space in the home) (39%)	1. It's free or cheap (49%) 2. Being able to access publications instantly whenever I want (47%) 3. The convenience of storing books, magazines or newspapers digitally (e.g. not needing physical storage space in the home) (43%)

Aged 12-15	Aged 16-24
1. It's free or cheap (40%) 2. The convenience of storing books, magazines or newspapers digitally (e.g. not needing physical storage space in the home) (38%) 3. Being able to access publications instantly whenever I want (34%)	1. It's free or cheap (56%) 2. Being able to access publications instantly whenever I want (42%) 3. The convenience of storing books, magazines or newspapers digitally (e.g. not needing physical storage space in the home) (37%)
Aged 25-34	**Aged 35-44**
1. It's free or cheap (47%) 2. Being able to access publications instantly whenever I want (45%) 3. The convenience of storing books, magazines or newspapers digitally (e.g. not needing physical storage space in the home) (38%)	1. It's free or cheap (43%) 2. Being able to access publications instantly whenever I want (42%) 3. The convenience of storing books, magazines or newspapers digitally (e.g. not needing physical storage space in the home) (39%)
Aged 45-54	**Aged 55+**
1. Being able to access publications instantly whenever I want (50%) 2. The convenience of storing books, magazines or newspapers digitally (e.g. not needing physical storage space in the home) (46%) 3. It's free or cheap (46%)	1. It's free or cheap (53%) 2. The convenience of storing books, magazines or newspapers digitally (e.g. not needing physical storage space in the home) (44%) 3. Being able to access publications instantly whenever I want (40%)

Base: 1,149 (downloaded or streamed e-publishing in the past 3 months)

Qualitative insight

Qualitative discussions further highlighted that the ability to consume publications online has considerably increased **convenience and ease of access**.

Importantly, these benefits were considered to have **positive knock-on effects for overall engagement** with publications. More specifically, being able to make impulse purchases and start reading books immediately, and not being restricted by storage in the house or when on the go.

- *"I use these because of the convenience, I guess. I can access what I want all in one place (i.e. a laptop or computer or my phone)." - Female 35-44*

- *"The best thing about e-publications being online is that one does not need physical media such as USB drives now to access them. They are instantly available." - Male 45-54*

- *"I like publications being available online for the convenience, mainly; I can read them straight away or download them for reading while I'm out and about. It also means I see articles I wouldn't have known about otherwise. Plus, they don't take up space in my home. (I have stacks of physical magazines I have yet to get through!)" - Female, 45-54*

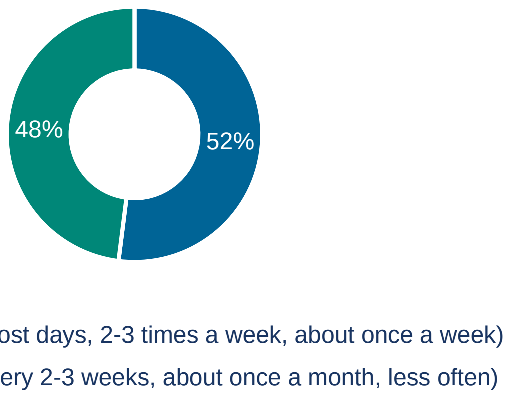
Accessing e-publications

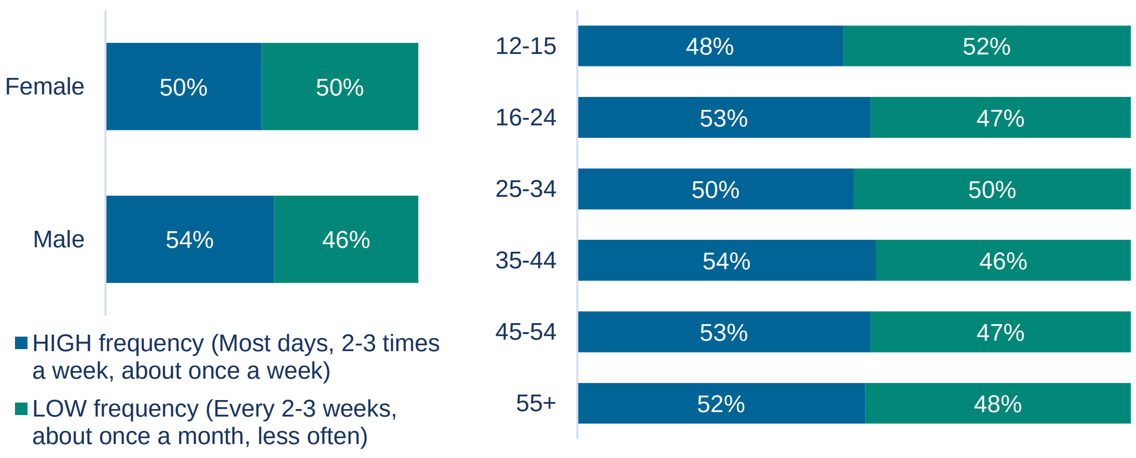
The 18% who had downloaded e-publications and the 12% who had streamed e-publications during the previous 3 months were asked more questions around frequency, volume and sources used.

Frequency and volume of accessing e-publications

- Just over half (52%) of those who accessed e-publications did so frequently (i.e. at least once a week). Weekly consumption was similar across genders and all age groups.
- There were, however, some notable demographic differences across volume. Overall, the average number of e-publications accessed was 48 over a three month period. For men, this rose to 57, and was even higher (66-68) for those aged 16-34.

G4. Generally, how often do you download or access E-publications through the internet? (%)

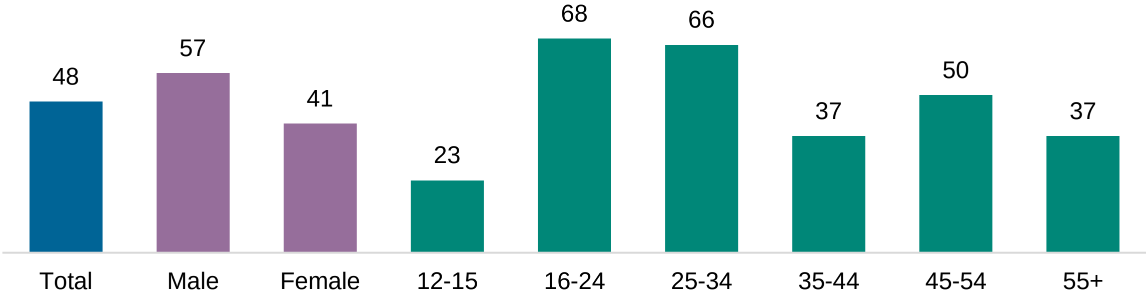




Base: 1,149 (accessed e-publications in the past 3 months)

Around half (49%) had accessed 10 or fewer e-publications in the previous 3 months, with around a quarter (24%) having accessed 50 or more.

G5. In the past 3 months how many E-publications have you downloaded/accessed through the internet? (average number of downloads)



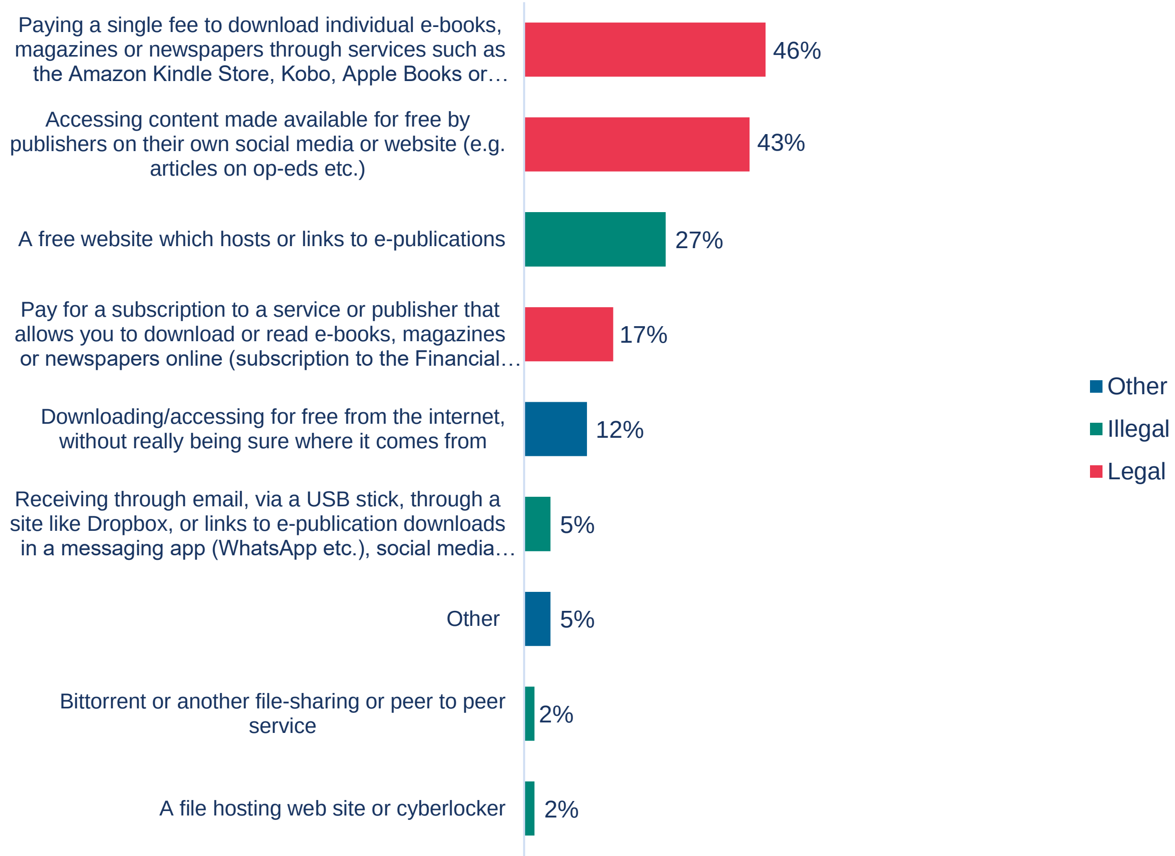
Base: 1,128 (downloaded e-publications in the past 3 months)

Sources of accessing e-publications

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could access e-publications. 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 "Paying a single fee to download individual e-books, magazines or newspapers through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks" (46%). This was closely followed by "Accessing content made available for free by publishers on their own social media or website (e.g. articles on op-eds etc.)" (43%)
- The most commonly used illegal method was "A free website which hosts or links to e-publications", which was chosen by over a quarter (27%). Other than this, no other illegal method was chosen by more than 5%.

G6. Which of the following have you used to download or access e-publications in the past 3 months? (%)



Base: 1,149 (downloaded or accessed e-publications during 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, magazines or newspapers through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks.com etc.	45%	48%	49%	32%	47%	48%	49%	51%
Pay for a subscription to a service or publisher that allows you to download or read e-books, magazines or newspapers online (subscription to the Financial Times, The Economist, The Times etc.)	20%	15%	24%	17%	22%	18%	13%	16%
Accessing content made available for free by publishers on their own social media or website (e.g. articles on op-eds etc.)	42%	44%	34%	47%	45%	40%	43%	41%
A file hosting web site or cyberlocker	3%	1%	4%	4%	3%	3%	1%	0%
Bittorrent or another file-sharing or peer to peer service	3%	1%	6%	4%	2%	3%	2%	1%
Receiving through email, via a USB stick, through a site like Dropbox, or links to e-publication downloads in a messaging app (WhatsApp etc.), social media or on a forum online	4%	7%	7%	6%	8%	7%	3%	4%
A free website which hosts or links to e-publications	24%	29%	21%	29%	25%	24%	23%	30%
Downloading/accessing for free from the internet, without really being sure where it comes from.	12%	11%	7%	10%	12%	15%	15%	9%
Other	5%	6%	4%	12%	6%	2%	3%	5%

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

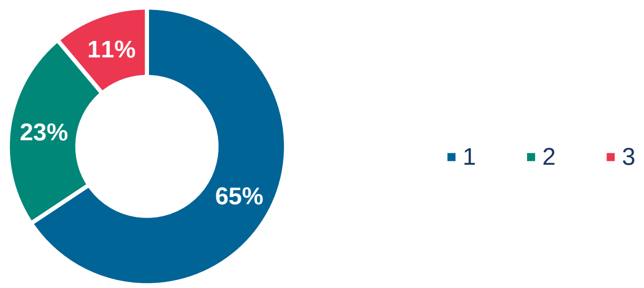
Base: 1,149 (downloaded or accessed e-publications during the past 3 months)

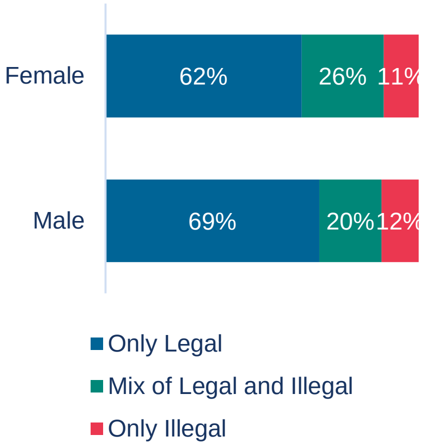
Legality of e-publishing access

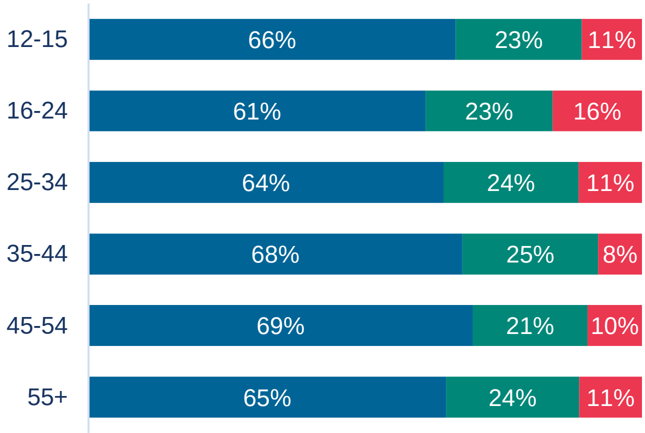
To better understand the distribution of sources across legal and illegal categories, those who had accessed e-publishing in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

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 89% had used at least one legal source to access e-publications.
  - **65%** had used only legal sources.
- Illegal:
  - **35%** had used at least one illegal source to access e-publications.
  - **11%** had used only illegal sources to download e-publications.
- Mixed:
  - **23%** had used a mix of legal and illegal sources.







Base: 1,066 (those who have downloaded or accessed e-publications in the past 3 months with those who selected 'other' or 'not sure of source' removed).

G7. And how is the way you download or access E-publications typically split across the following sources?

Legality	Source	Average % of usage split	Average downloads
Legal	Paying a single fee to download individual e-books, magazines or newspapers through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks.com etc.	36%	8
	Accessing content made available for free by publishers on their own social media or website (e.g. articles on op-eds etc.)	27%	22
	Pay for a subscription to a service or publisher that allows you download or read e-books, magazines or newspapers online (subscription to the Financial Times, The Economist, The Times etc.)	10%	7
Illegal	A free website which hosts or links to e-publications	13%	5
	Receiving through email, via a USB stick, through a site like Dropbox, or links to e-publication downloads in a messaging app (WhatsApp etc.), social media or on a forum online	2%	5
	Bittorrent or another file-sharing or peer to peer service	1%	1
	A file hosting web site or cyberlocker	1%	0
Other	Downloading/accessing for free from the internet, without really being sure where it comes from.	6%	3
	Other	5%	2

Base: 1,128 (downloaded/accessed e-publications in the past 3 months)

Qualitative insight

There seemed to be some confusion over the legality of some sources that were used. More specifically, some highlighted that while certain sources claimed to be legal and in-line with the copyright laws of the host country, they were not confident that this was the case. Given the general lack of clarity, many seemed comfortable with using such sources to access the content they wanted…

A few highlighted that in some instances, illegal methods were the only choice. For example, if they wanted to access publications that were out of print or otherwise unavailable from legal sources.

- *"Occasionally, my StartPage search will lead me to a copy that's been uploaded and I'm not always sure if it's legal or not. I must admit, what I do in that situation depends on how badly I want to read it!" - Female 45-54*

- *"I access e-publications online for free. I use a free website which hosts or links to e-publications, for as long as I know that the site is legitimate then it is a good way to find content. The weakness could be that copyright infringement may also be higher if one is not careful about choosing an ethical provider/the site owner claims an item is copyright free, but in reality it isn't." - Male, 45-54*

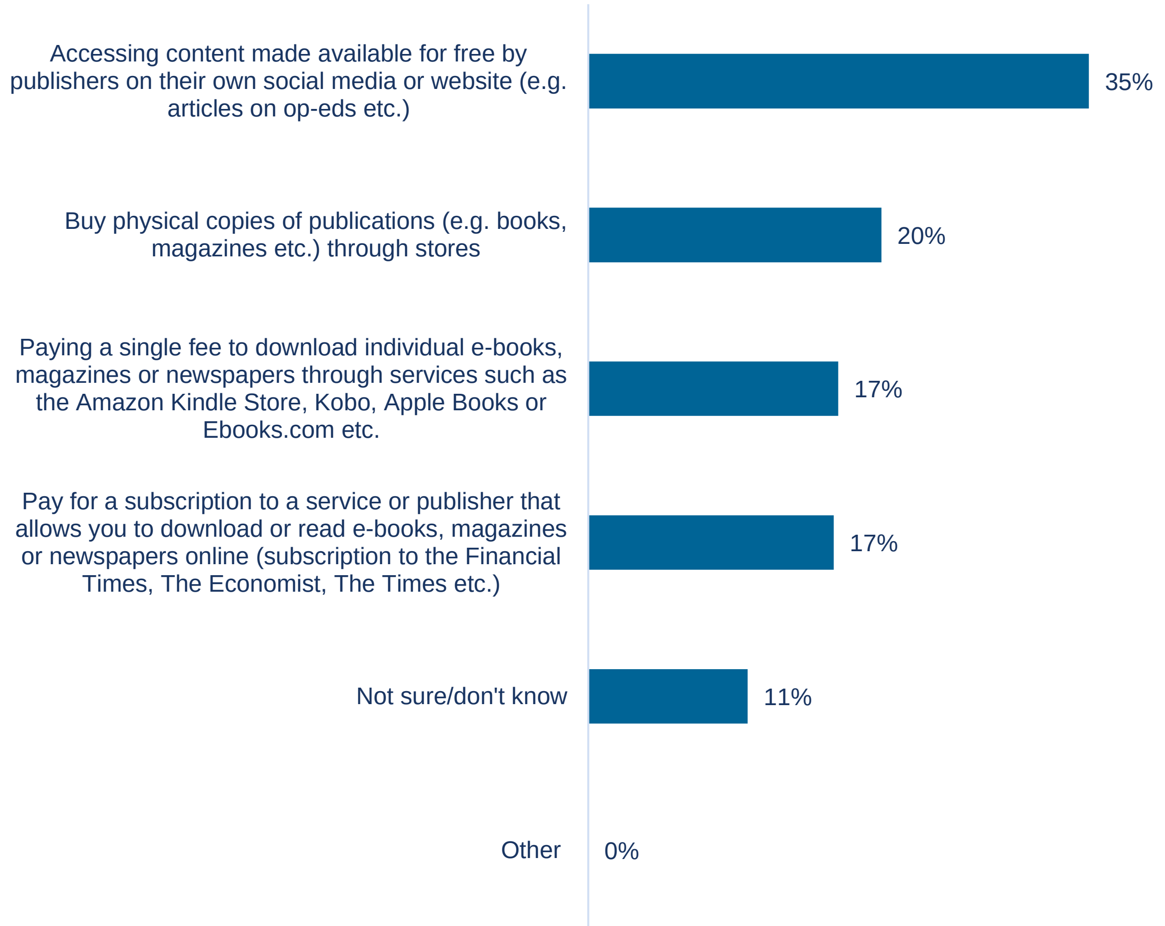
- *"I use Zippyshare as it is safe to use and it became a habit." - Female, 35-44*

Alternatives to infringement

Those who had used illegal sources to access e-publications 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 use a free method to access content, with approximately a third (35%) specifying that they would access "content made available for free by publishers on their own social media or website".
- It is, however, encouraging to note that paid options accounted for over half (54%) of respondents. They were split between buying "physical publications through stores" (20%), "paying a single fee to download individual" e-publications (17%) and paying "for a subscription to a service or publisher that allows you to download or read" e-publications (17%).

G8. If e-publications 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+
Paying a single fee to download individual e-books, magazines or newspapers through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks.com etc.	18%	17%	31%	4%	18%	18%	11%	26%
Pay for a subscription to a service or publisher that allows you to download or read e-books, magazines or newspapers online (subscription to the Financial Times, The Economist, The Times etc.)	18%	16%	49%	34%	15%	11%	17%	0%
Buy physical copies of publications (e.g. books, magazines etc.) through stores	18%	22%	10%	12%	22%	24%	27%	21%
Accessing content made available for free by publishers on their own social media or website (e.g. articles on op-eds etc.)	35%	34%	10%	40%	39%	40%	23%	37%
Other	0%	0%	0%	0%	0%	0%	0%	0%
Not sure/Don't know	11%	11%	0%	11%	6%	6%	22%	17%

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

Base: 142 (downloaded or accessed e-publications illegally)

Qualitative insight

Encouragingly, most noted that they would be able to go without using illegal sources to access e-publications. This would, however, lead to some shifts in consumption habits. For example, to keep their overall costs similar, they would look to prioritise which publications to purchase and which to forego.

Some also indicated that they would feel more comfortable accessing publications via sources that they were confident were legal.

- *"I would be completely happy with only using industry approved sources and methods as I always prefer paying for an official product, so it wouldn't bother me. I would carry on consuming the same amount of e-publications that I do now and for the same amount of time as per my routine." - Male, 45-54*

- *"If I had to pay for it, I'd probably narrow my consumption to the subjects I'm most interested in and would have to be sure that I can justify the spend. I'd probably read single-pay items infrequently, but if I had a subscription, I'd read it daily to ensure I get my money's worth!" - Female, 45-54*

- *"I would pay for the stuff that I really want." - Female, 35-44*

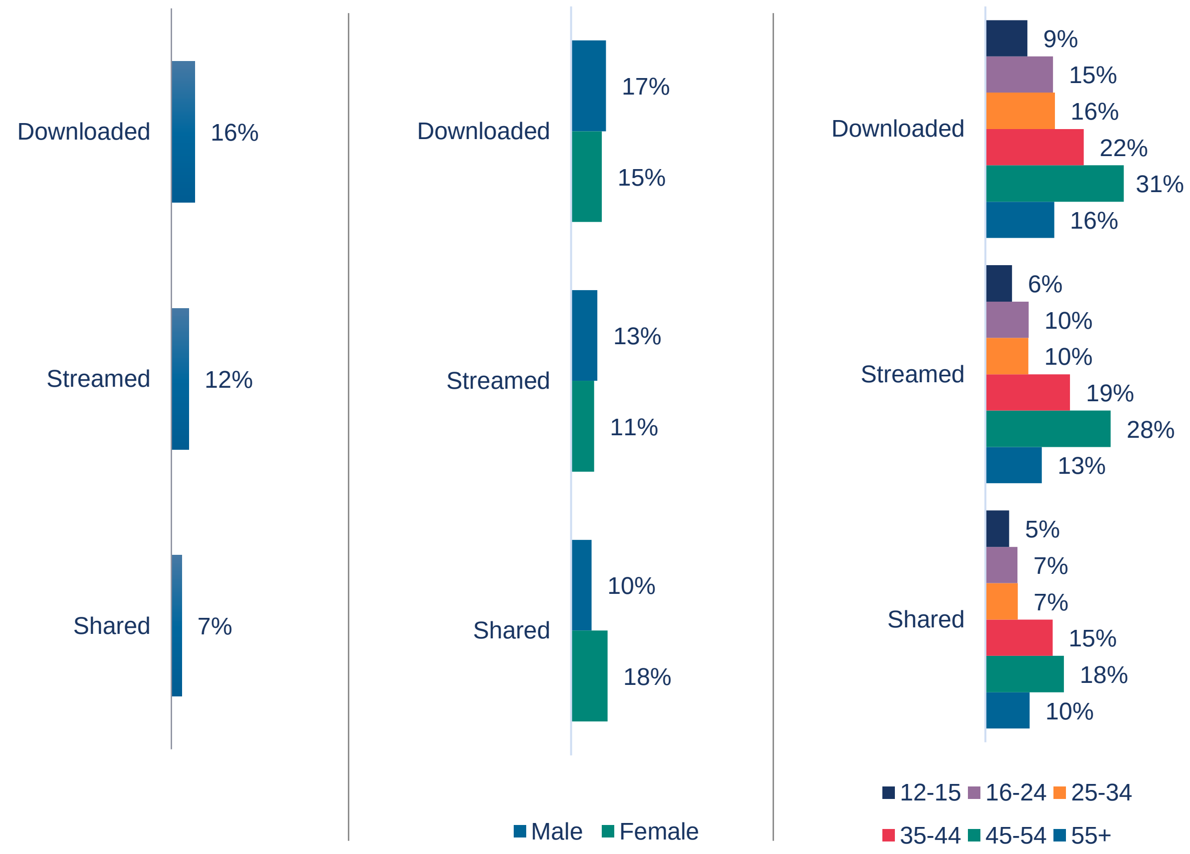
Digital Visual Images

Engaging with digital visual images

21% 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 (16%) than streaming/accessing online (12%), with 7% having shared them with others.
- Across all methods, those aged **45-54** were notably more engaged than both older and younger groups, although 35-44 year olds displayed similar habits in relation to sharing.

H1. Have you downloaded/streamed/shared[13] copies of digital visual images in the past 3 months?



Base: 2019 n = 5,014 (total sample)

[13] The definition of 'shared' given was: *"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."*

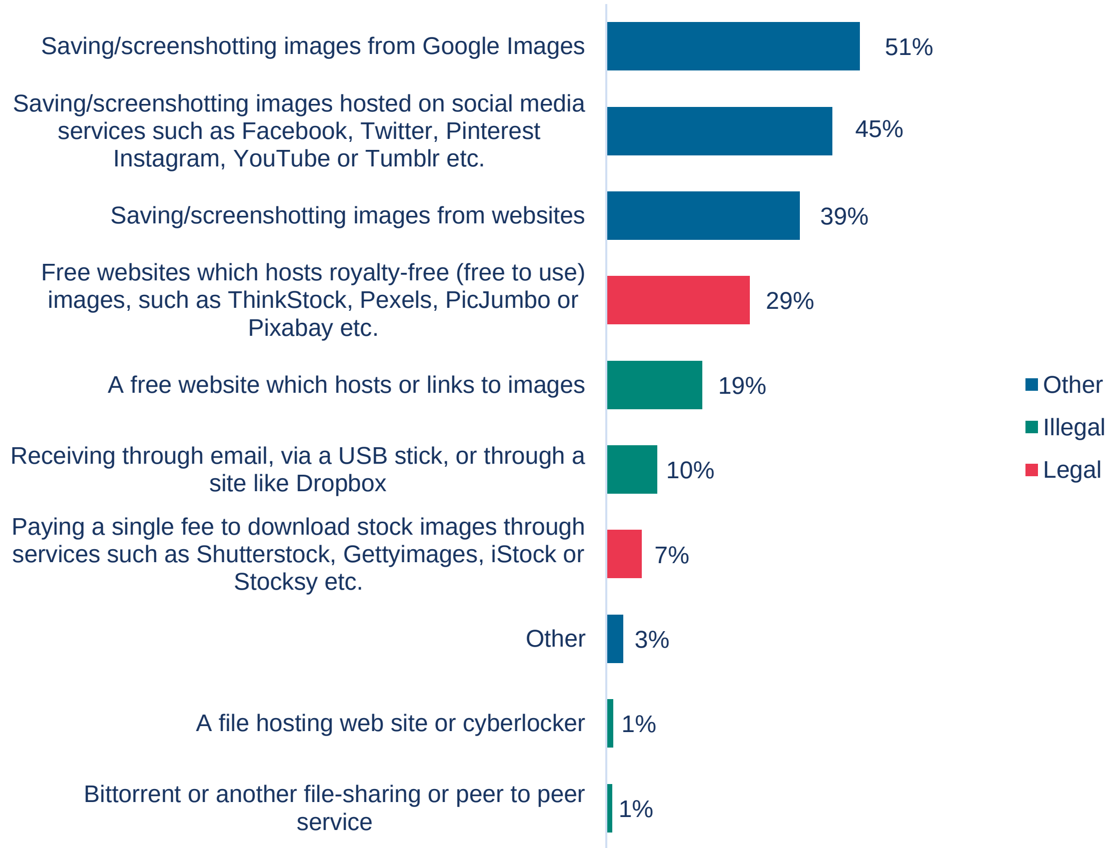
Sources of Digital Visual Images

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 questionnaire that we were asking about images that do not belong to our respondents (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). It is important to note that respondents were not asked about how they go on to use the images, 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.

- The most common behaviour, overall, was taking **screenshots** of digital visual images hosted online. More specifically, half (51%) did so from Google Images, 45% from social media and 39% from other websites.
- Those who accessed through **legal** means were more likely to use “Free websites which host royalty-free images” (29%), with a smaller proportion (7%) paying a 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” (19%) and “Receiving through email, via a USB stick, or through a site like Dropbox (10%). 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: 1,071 (downloaded/streamed digital visual images in the past 3 months)

Behaviour Change Opportunities

Key factors influencing infringement across content categories – Qualitative Summary

Across entertainment categories, there are three broad drivers of accessing content illegally.

The **abundance of free and widely accessible illegal content** means that even those concerned about infringing may occasionally resort to using unofficial sources if they want the content badly enough. A few mentioned the near obsessive mindframe of not finding something on legal channels but knowing it is 'out there somewhere' and hunting it down.

Another factor is the **cost** of accessing content and a desire to **limit spending**. Given the amount of content that is increasingly available, consumers are worried about over-spending. As such, the opportunity to turn to free, illegal methods is valued. It enables them to access the content they want without exceeding their budget.

The **ease of access** to illegal content equally plays a role. Finding and accessing illegal content is simple, quick and easy to do. It may often reduce the time and effort involved in sourcing content legally, for example not having to spend time signing up to official sites or searching through various legal platforms for the desired content.

Communications Testing

In the qualitative phase, the effectiveness of 10 potential behaviour change campaigns was tested.

Broadly, the content shown fell into one of the following categories:

1. Campaigns making clear that the behaviour is illegal
2. Campaigns highlighting the potential consequences or repercussions of illegal behaviour

Responses to campaigns depended somewhat on the level of experience and frequency of infringing, as well as moral standpoint. Two broad segments emerged:

- **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.

When evaluating the campaigns, across the entire group, the following were identified as effective:

- **Personal:** Campaigns where the message was anchored in everyday scenarios that people can identify with (e.g. getting together to watch the football)
- **Relevant:** Campaigns that elicit emotional responses rather than more factual ones (e.g. being a victim of identity theft vs. malware)
- **Clear:** Campaigns with straightforward and uncomplicated messages are preferred. Any form of confusing rhetoric or double meaning runs the risk of taking attention from the core message (e.g. 'You wouldn't buy a digital virus…')
- **Eye catching:** Campaigns that appear clean and simple, with measured use of images and colours, grab attention while also aiding comprehension.

- **Tone**: While most believe detailing the consequences of accessing illegal content is crucial to deterring such behaviour, a few take issue with the use of 'scare tactics' and feel the ads are too accusatory.

There were also some **specific needs** identified by each segment:

Cautious Infringers:
- Simple messages reinforcing which behaviours are illegal and sign-posting to further information and clarification. This is especially important for those who are sent content by others and/or use services where there is some ambiguity around legality (e.g. Kodi boxes).

Savvy Infringers:
- Giving real life examples to address the perception that "it will never happen to me". For example, stories of people who were caught and fined, or were victims of hacking.
- Giving greater detail on the repercussions of being caught or being hacked. More specifically, rather than simply talking about being a victim of fraud or about this behaviour being illegal, stating the potential impact on credit score, losing money, accessing personal photos etc.

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 where a mix of online and face-to-face interviews were used. There are a number of benefits to this new 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 OCI study.

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 this year's methodology 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=2,495) 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

This wave's questionnaire saw a departure from previous waves in several ways. In line with previous cycles, the full questionnaire for this wave will be published separately, but the most substantive changes are outlined below:

- **The way that legal and illegal activity was ascertained underwent changes**. Rather than asking outright as to whether legal or illegal sources were used, a comprehensive list of all possible approaches to accessing the content online was presented (instead of individual sources). These were tailored for each content category. The legal and illegal categorisations were then produced during the data processing stage. This less direct approach has the benefit of encouraging more honest answers. It is, however, important to highlight that the change in approach has implications for like for like comparisons to previous waves.
- **New product categories were included**. Live sport was added, while e-books was broadened out as a category to also include e-publishing. The description of digital visual was also expanded on.
- **We sought to establish respondents' passion for each category**. 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.
- **Streaming questions asked about the number of hours they had spent streaming content, rather than number of files they had streamed,** as this is much easier for respondents to consider.
- **To minimise recall bias, questions about volume were based on how frequently people consumed content**. The "3 month" figure was then aggregated up, as relevant. For example, those who consumed monthly were asked about that time period; this figure was then multiplied by three to establish volume over 3 months.
- To achieve time efficiencies, required to accommodate some of the questions detailed above, a number of **questions were removed from the 2018 survey**. These mainly covered metrics that were underused or data that was variable relative to other industry sources.

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.

Achieved sample

Our sample included 5,014 respondents.

Male	49%
Female	51%
Other	0%

12-15	7%
16-24	10%
25-34	16%
35-44	15%
45-54	16%
55+	35%

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

White	91%
Asian	5%
Black	2%
Other Ethnic Origins	1%
Mixed/Multiple Ethnic Origins	1%

Northern Ireland	3%

Yes, I am a parent	29%
Yes, I am a guardian	1%
No	70%

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 80.6%.

Examples

In each category examples were given along with ways that each category could be downloaded, streamed or accessed. These included the below:

Source	Source	Examples
Music (downloading)	BitTorrent or another file-sharing or peer to peer service	uTorrent, BitTorrent, The Pirate Bay etc.
	A file hosting website or cyberlocker	Openload, Zippyshare, 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	Flvto.biz, ConvertMP3, YouTube Downloader etc.
Music (streaming)	A file hosting website or cyberlocker	Openload, Zippyshare, MediaFire, Rapidgator etc.

Source	Source	Examples
Film (downloading)	BitTorrent or another file-sharing or peer to peer service	uTorrent, BitTorrent, The Pirate Bay etc.
	A file hosting website or cyberlocker	Openload, Zippyshare, 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	Flvto.biz, ConvertMP3, YouTube Downloader etc.
Film (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.

Source	Source	Examples
TV (downloading)	BitTorrent or another file-sharing or peer to peer service	uTorrent, BitTorrent, The Pirate Bay etc.
	A file hosting website or cyberlocker	Openload, Zippyshare, 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	Flvto.biz, ConvertMP3, YouTube Downloader 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.

Source	Source	Examples
Live Sports	A file hosting website or cyberlocker	Openload, Zippyshare, 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.
	BitTorrent or another file-sharing or peer to peer service	uTorrent, BitTorrent, The Pirate Bay etc.

Source	Source	Examples
Video Games	A file hosting website or cyberlocker	Openload, Zippyshare, MediaFire, Rapidgator etc.
	BitTorrent or another file-sharing or peer to peer service	uTorrent, BitTorrent, The Pirate Bay etc.

Source	Source	Examples
Software	A file hosting website or cyberlocker	Openload, Zippyshare, MediaFire, Rapidgator etc.
	BitTorrent or another file-sharing or peer to peer service	uTorrent, BitTorrent, The Pirate Bay etc.

Source	Source	Examples
e-publications	A file hosting website or cyberlocker	Openload, Zippyshare, MediaFire, Rapidgator etc.
	BitTorrent or another file-sharing or peer to peer service	uTorrent, BitTorrent, The Pirate Bay etc.

Source	Source	Examples
Digital Visual Images (streaming/ downloading)	A file hosting website or cyberlocker	Openload, Zippyshare, MediaFire, Rapidgator etc.
	BitTorrent or another file-sharing or peer to peer service	uTorrent, BitTorrent, The Pirate Bay etc.
	A free website which hosts or links to images	Flickr, 500px, Imgur, Photobucket etc.

About AudienceNet

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. With offices in London, Washington D.C. and Melbourne, AudienceNet conducts research, around the clock, in more than 40 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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