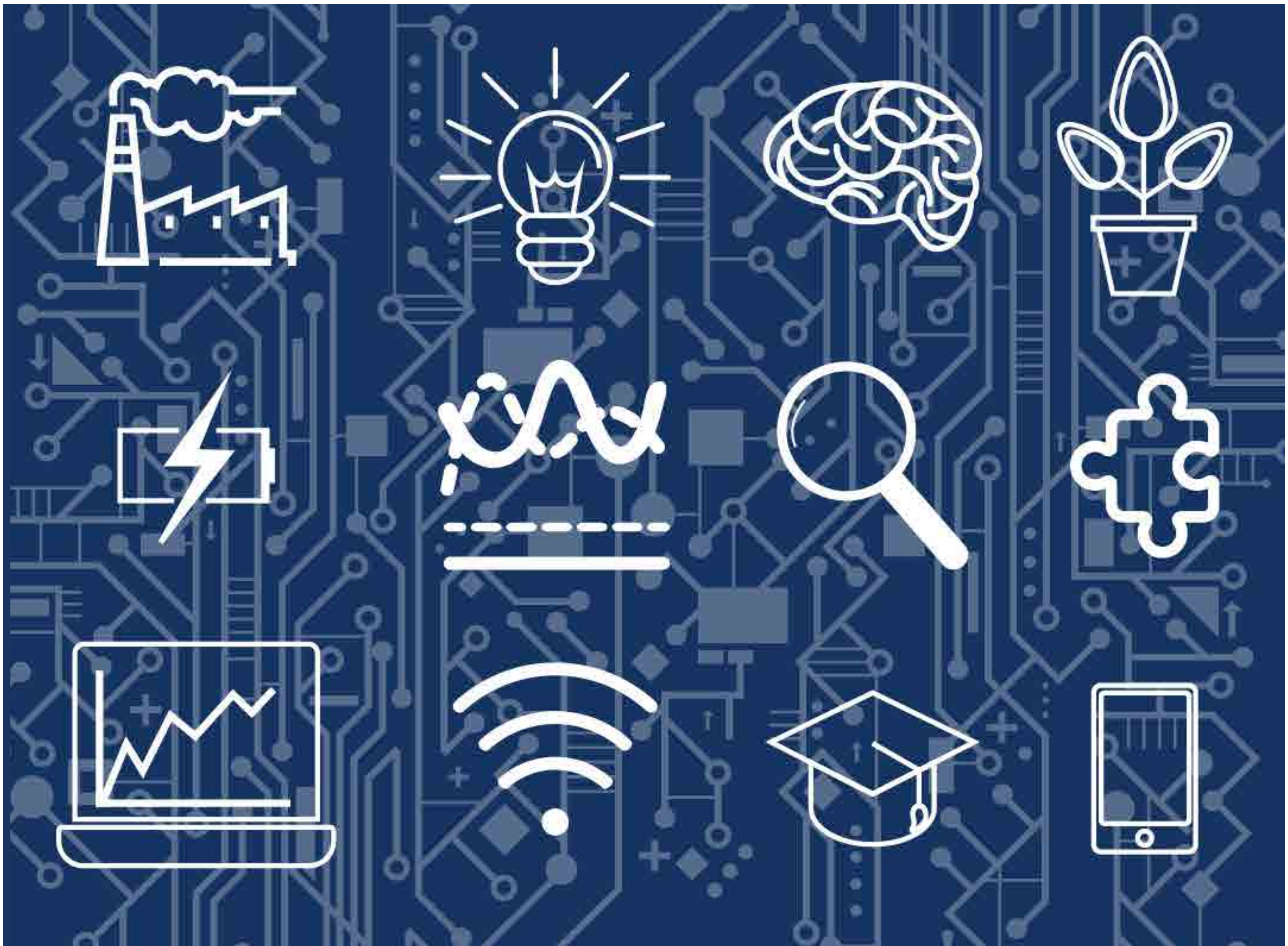
Intellectual Property Office

Online Copyright Infringement Tracker

Wave 11 - This is independent research carried out by AudienceNet on behalf of the Intellectual Property Office (IPO). Findings and opinions are those of the researchers, not necessarily the views of the IPO or the Government.



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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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Online Copyright Infringement Tracker
Latest wave of research (March 2020) Overview and Key findings.

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Executive Summary

This wave of the research shared some similarities to the previous year, with both asking about periods of time when much of the UK was in a state of lockdown owing to the COVID-19 pandemic. However, there are also some shifts which potentially point to the differences in terms of how these lockdowns were experienced.

- Consumption (i.e. downloading or streaming/accessing content online) increased across a number of categories. This was most evident in streaming/accessing where all categories were at the highest point seen in the study so far. The proportion streaming live sport, which last year saw the largest decrease of any category with fewer sport events taking place for much of the period asked about, returned to the levels seen before COVID-19. There were also smaller increases in those downloading music, film and TV, although in most cases the proportion doing so was still below that seen in the pre COVID-19 peak.
- As in the previous lockdown, passion for content categories continued to be important to respondents with many indicating that the content categories asked about were central to their lives.
- The main drivers for online consumption were the choice/variety of content on offer, being able to access it immediately and the cost.
- The overall level of infringement for all content categories (excluding digital visual images) was 25%, which is 2% higher than the previous year but the same as in four of the previous five years.

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Notable changes in consumption

- The proportion who had watched live sports increased by 7% to 15%, which took it back to the levels seen before the pandemic (14% in Wave 9 in 2019). There was also a decrease in the proportion using illegal sources to stream live sport which was fuelled by a 7% drop in those using a mix of legal and illegal sources.
- Streaming in other content categories increased compared to the previous wave. This was particularly evident in music (+5% to 42%), film (+3% to 45%) and TV (+3% to 44%). All grew to the highest points seen in the study and were also accompanied by levels of infringement which remained unchanged compared to the previous wave.
- Downloading in most categories bounced back from the low levels seen in the previous wave. There were increases for film (+3% to 22%), music (+3% to 26%) and TV (+3% to 19%). While film was at the highest level seen so far in this study, music and TV were both below their previous peaks. The levels of infringement for all of these remained broadly unchanged compared to the previous wave.

Infringement levels

OVERALL INFRINGEMENT LEVEL 25%

Above average infringement levels

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

Live sports – 29%

Digital magazines – 27%

Audiobooks, software and film were around, or just below, average infringement levels:

Audiobooks – 24%

Software – 23%

Film - 20%

Music, TV, e-books and video games were notably lower than average infringement levels:

Music -15%

TV – 14%

E-books - 14%

Video games - 11%

Qualitative Summary

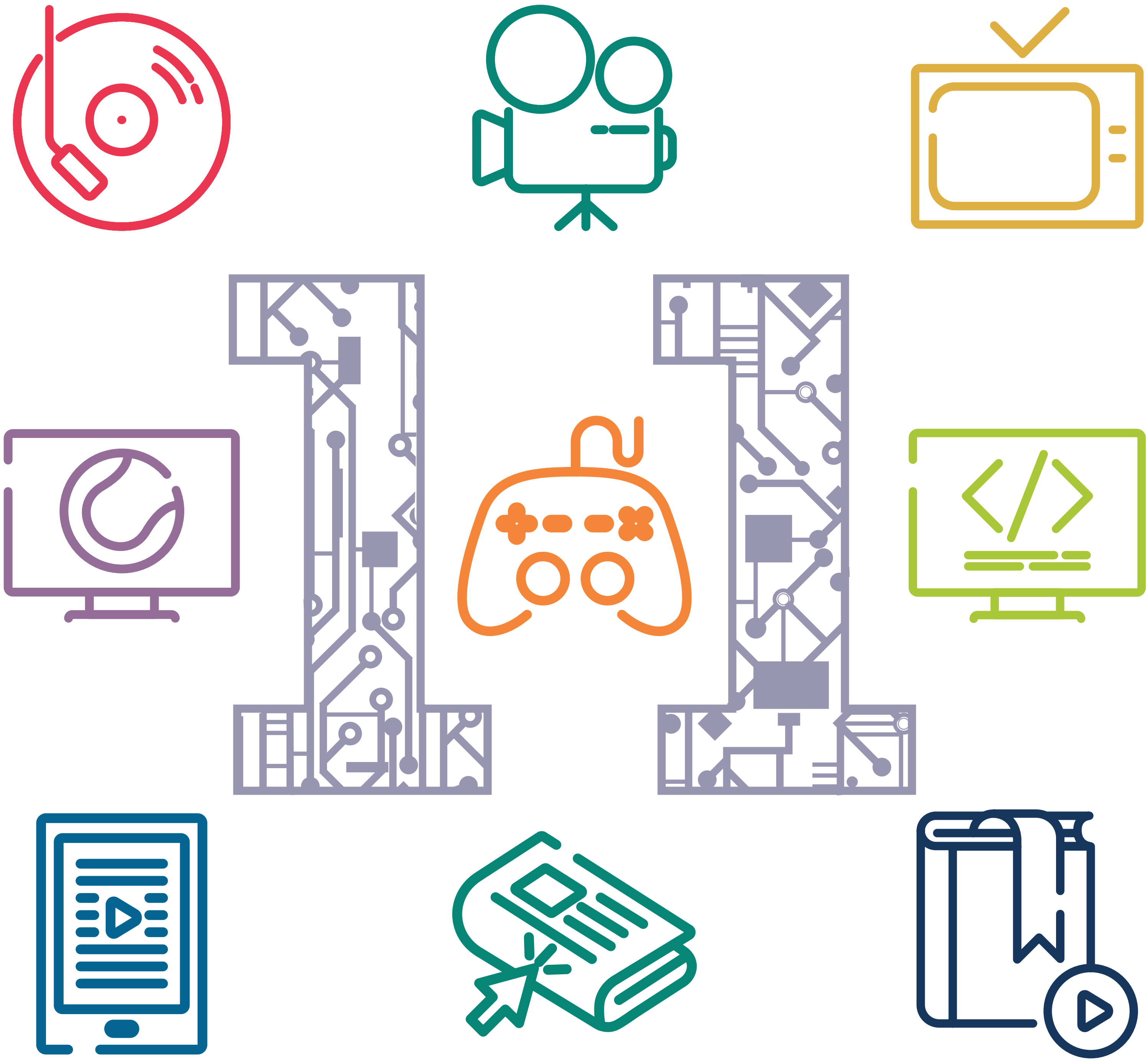
In the qualitative stage of research, participants gave further detail about how and when they accessed entertainment categories online. With the research taking place during the third official national lockdown in the UK, participants expanded on how they had experienced the last year and how they had navigated the uncertainty and often the stress of prolonged social restrictions. Many participants spoke about how the continued restrictions had started negatively impacting their mental health and, in some cases, their finances.

The persistence of social restrictions and the strain this placed on many participants meant that many had started valuing the entertainment they consumed to a greater extent. Most participants said that access to entertainment during the past year of lockdowns helped their mental health by distracting them from the daily reality of the pandemic and, in some instances, facilitating forms of social interaction online or within households at a time when interaction was otherwise restricted.

Many participants noted a general increase in their consumption of entertainment content compared to their level before the pandemic, either due to a greater reliance on such content or to fill the free time some participants now found themselves with. Some participants said that their general increase in consumption had also led to an increase in access from unofficial sources, as a way of finding more content in a cost-effective manner. General drivers of infringement, as in previous waves of qualitative research, remained cost and greater access to content which was not available on paid subscriptions or other legal methods.

In the final part of the Online Community which focussed on testing communications aimed to discourage infringement, the exercise provided many additional learnings to knowledge gained previously. Building on past findings around creating empathy for creative industries, responses showed positive reactions to messages about the impact of the pandemic on individuals within these industries and provided more insight on which individuals to focus on. Additionally, hypothetical interventions and enforcement methods introduced to the exercise were shown to have the potential to dissuade many participants from infringing. Meanwhile, messages about the risks of malware to consumers were engaging for some but did not hold much sway with established infringers.

Category Summaries



Music

Engagement (past three months)

(% difference to 2020)

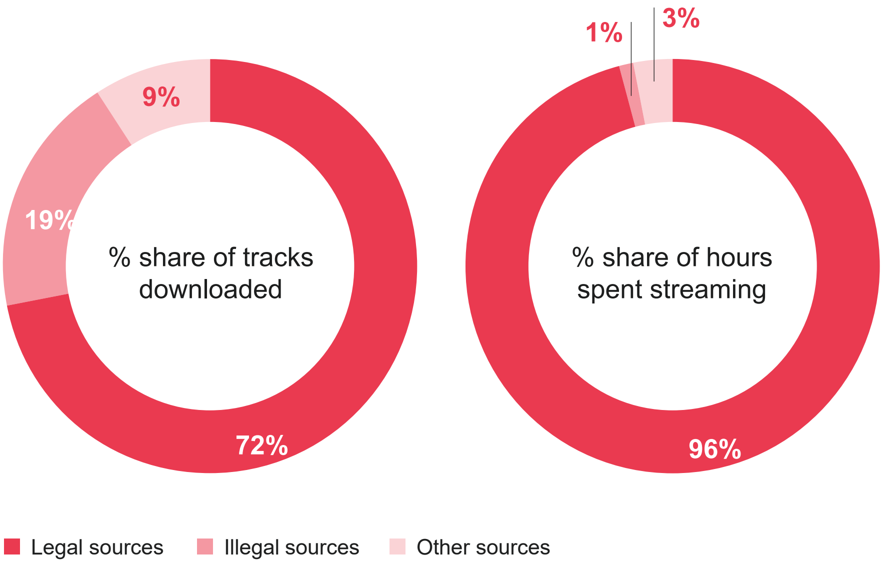
Streamed

Downloaded

Physical purchases

Streaming was the most common method of accessing music, with 42% having done so in the previous three months. This was followed by downloading (26%) with physical purchases in third place (12%).

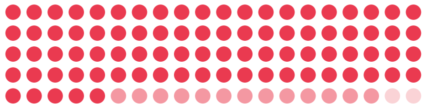
Streaming saw a +5% increase compared to last year with a smaller increase for downloading (+3%). Physical purchasing remained stable (+1%).



Infringement among music consumers (past three months)

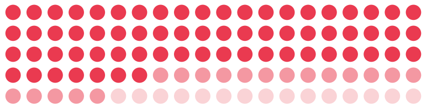
(% difference to 2020)

Downloaded or streamed



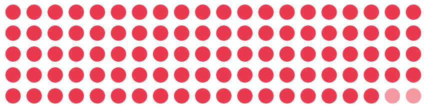
Only legal	85% (+3%)
Mix	13% (-3%)
Only illegal	2% (0%)

Downloaded



Only legal	67% (+2%)
Mix	18% (-1%)
Only illegal	15% (0%)

Streamed



Only legal	98% (0%)
Mix	2% (0%)
Only illegal	0% (0%)

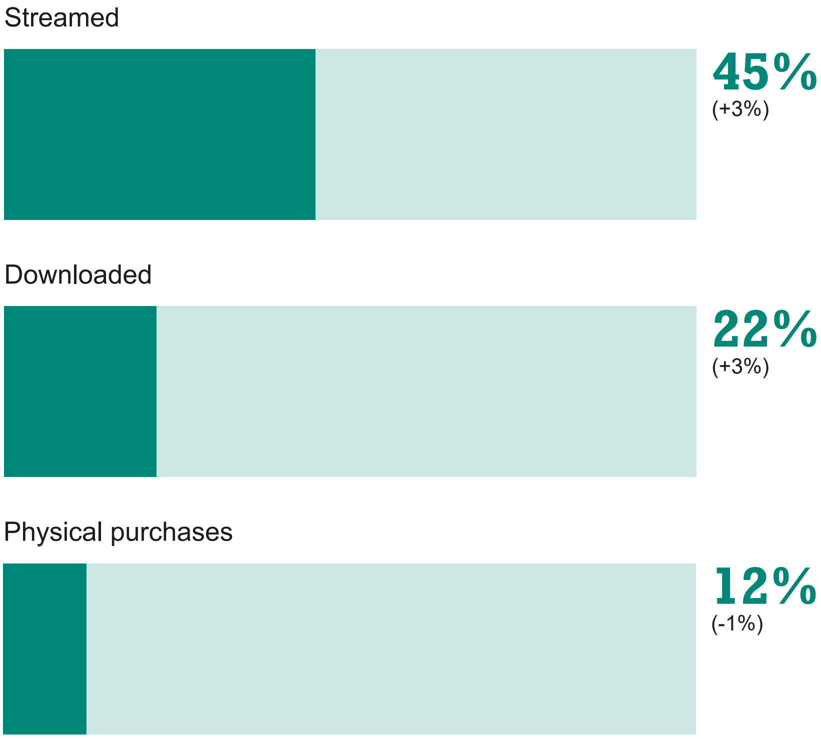
The overall level of infringement (i.e. anyone who had used an illegal source for music in the previous three months) experienced a small decline from 18% in 2020 to 15% in 2021. The only notable shift in the type of infringement was a 3% decline in those using a mix of legal and illegal sources and an increase of the same amount in those using only legal sources.

Illegal sources accounted for almost one in five (19%) of all tracks downloaded but only 1% of time spent streaming music.

Film

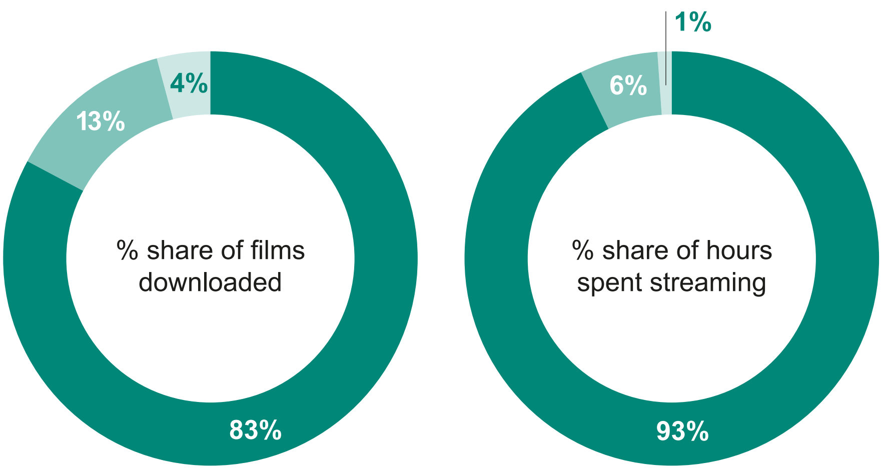
Engagement (past three months)

(% difference to 2020)



Streaming was the most common method of accessing films, with 45% having done so in the past three months. This was followed by downloading (22%) with physical purchases in third place (12%).

Both streaming and downloading saw increases of +3% compared to last year. Physical purchasing remained stable (-1%).

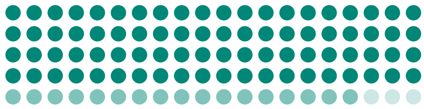


Legal sources | Illegal sources | Other sources

Infringement among film consumers (past three months)

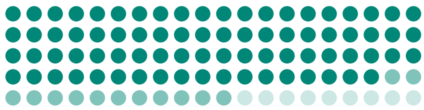
(% difference to 2020)

Downloaded or streamed



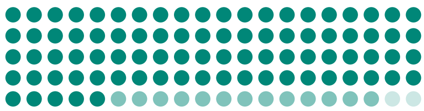
Only legal	80% (0%)
Mix	17% (0%)
Only illegal	3% (0%)

Downloaded



Only legal	78% (+2%)
Mix	13% (-2%)
Only illegal	9% (0%)

Streamed



Only legal	85% (+1%)
Mix	13% (-1%)
Only illegal	2% (0%)

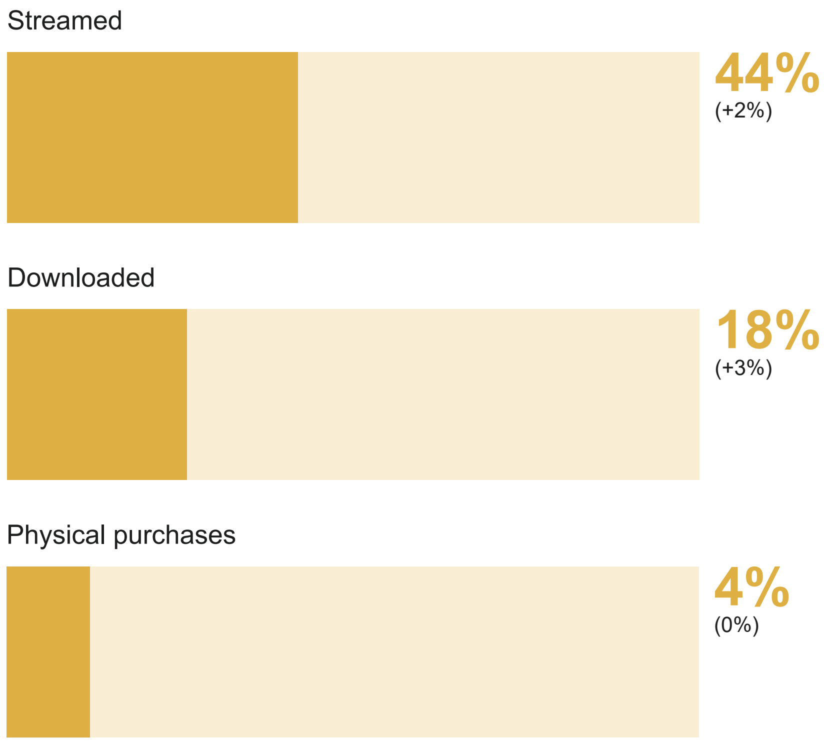
The overall level of infringement (i.e. anyone who had used an illegal source for film in the past three months) was, at 20%, unchanged compared to last year. There were no notable shifts in the type of infringement.

Illegal sources accounted for 13% of all film downloads and 6% of all time spent streaming.

TV

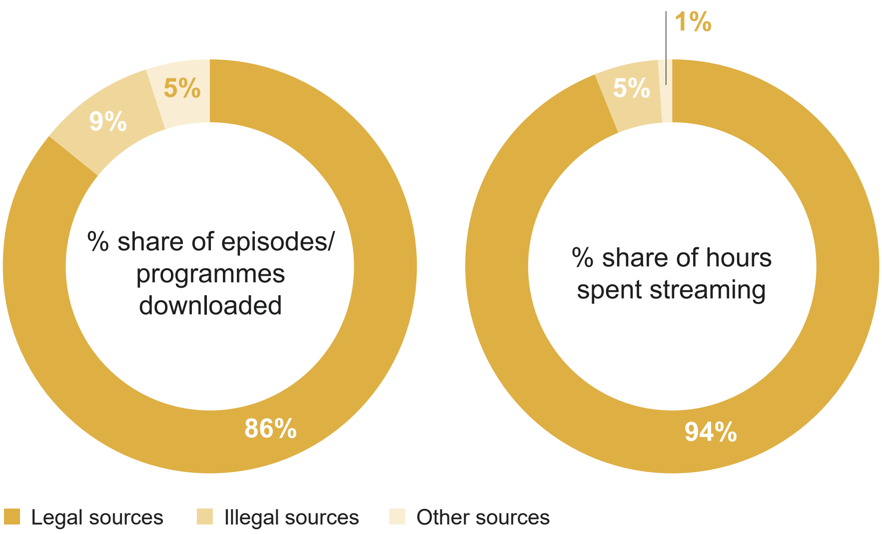
Engagement (past three months)

(% difference to 2020)



Streaming was the most common method of accessing TV, with 44% having done so in the previous three months. This was followed by downloading (18%) with physical purchases in a distant third place (4%).

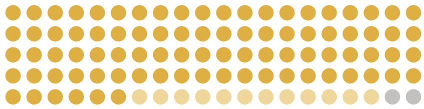
Both streaming and downloading saw increases of +2% and +3% respectively compared to last year. The proportion making physical purchases was unchanged.



Infringement among TV consumer (past three months)

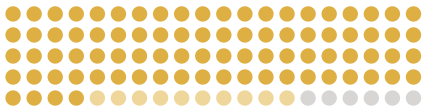
(% difference to 2020)

Downloaded or streamed



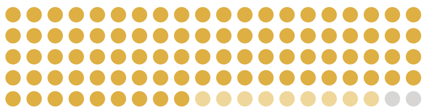
Only legal	86% (+1%)
Mix	12% (-1%)
Only illegal	2% (0%)

Downloaded



Only legal	84% (+2%)
Mix	10% (-2%)
Only illegal	6% (-1%)

Streamed



Only legal	89% (0%)
Mix	9% (-1%)
Only illegal	2% (0%)

The overall level of infringement (i.e. anyone who had used an illegal source for TV in the previous three months) was, at 14%, unchanged compared to last year. There were no notable shifts in the type of infringement.

Illegal sources accounted for 9% of all TV episodes/programmes downloaded and 5% of all time spent streaming.

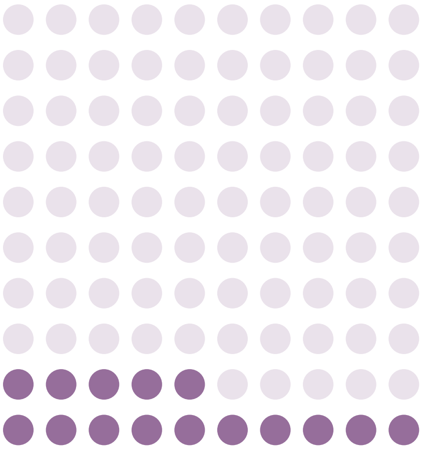
Live Sports

Engagement (past three months)

(% difference to 2020)

The proportion streaming live sport was, at 15%, more than double what it was in the previous year

Streamed

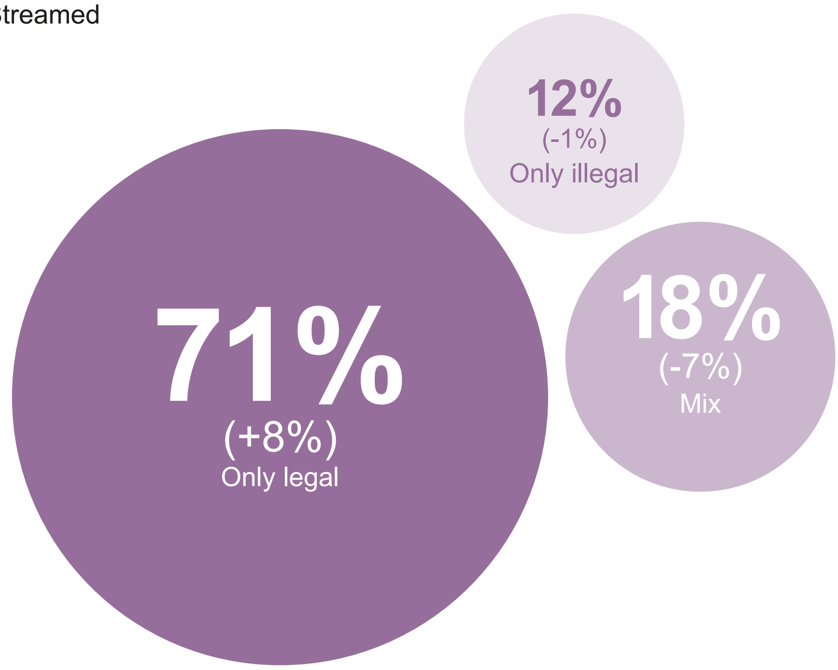


15%
(+7%)

Infringement among live sport consumers (past three months)

(% difference to 2020)

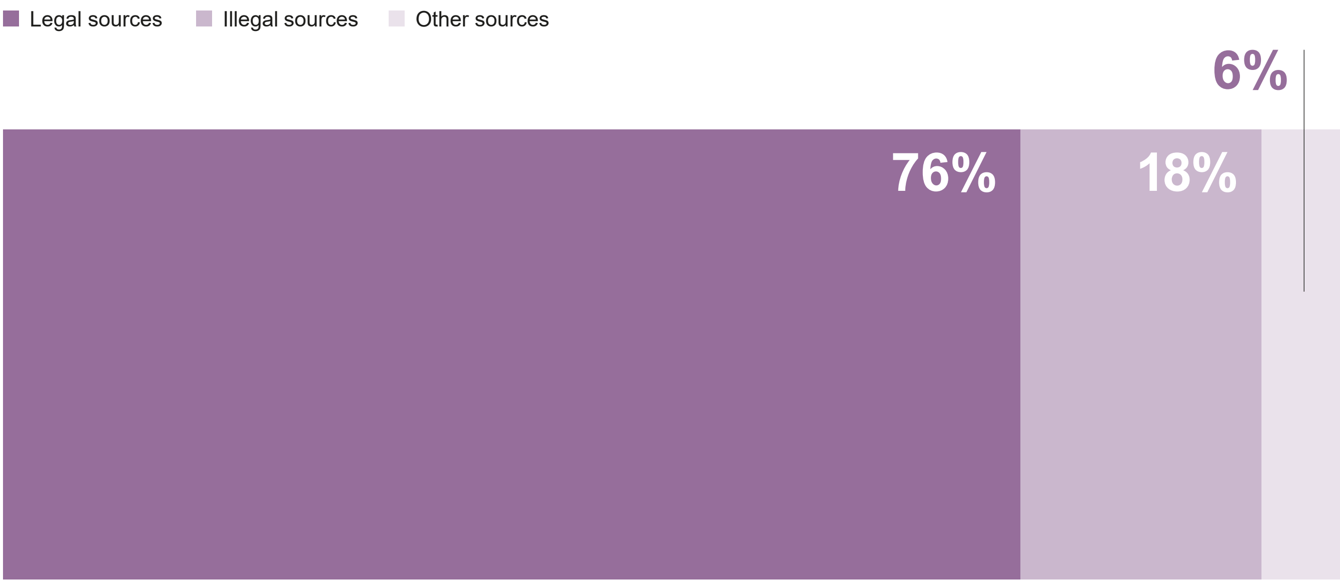
Streamed



Those using illegal sources in the previous three months to access live sport was, at 30%, 8% lower than the previous year.

There was a 7% decrease in those using a mix of legal and illegal methods and an increase of 8% in legal sources only. Illegal sources comprised 18% of all live sport events streamed.

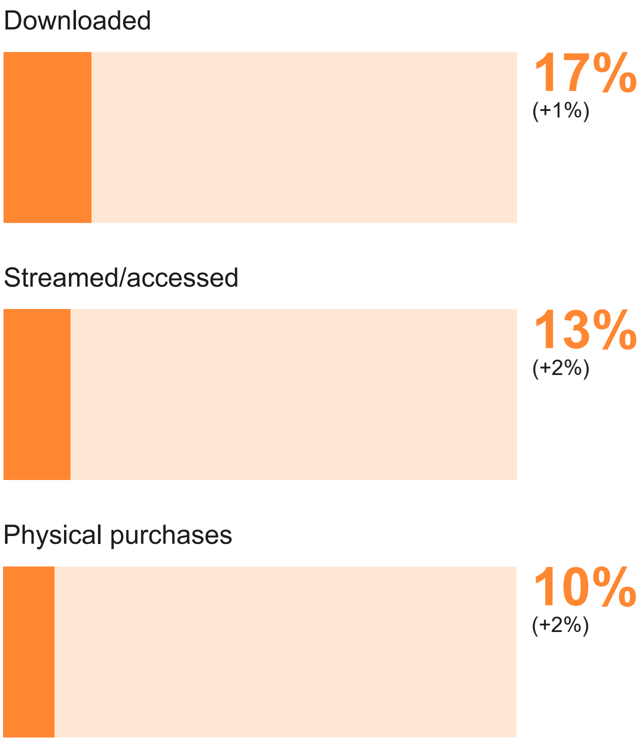
Share of live sport events streamed



Video games

Engagement (past three months)

(% difference to 2020)

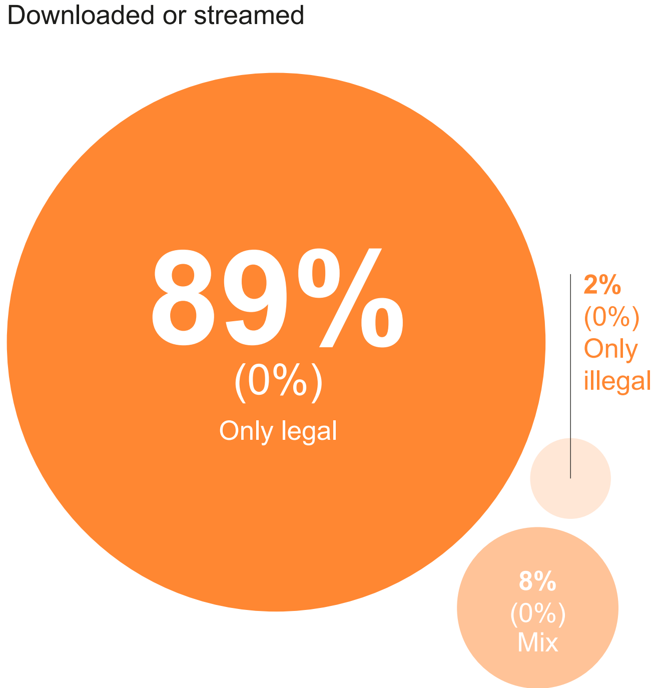


Downloading was the most common (17%) way of accessing video games. This was followed by streaming (13%) and physical purchases (10%).

Compared to last year there were small 2% increases across downloading and streaming/accessing. Physical purchasing remained stable (+1%).

Infringement among live video game consumers (past three months)

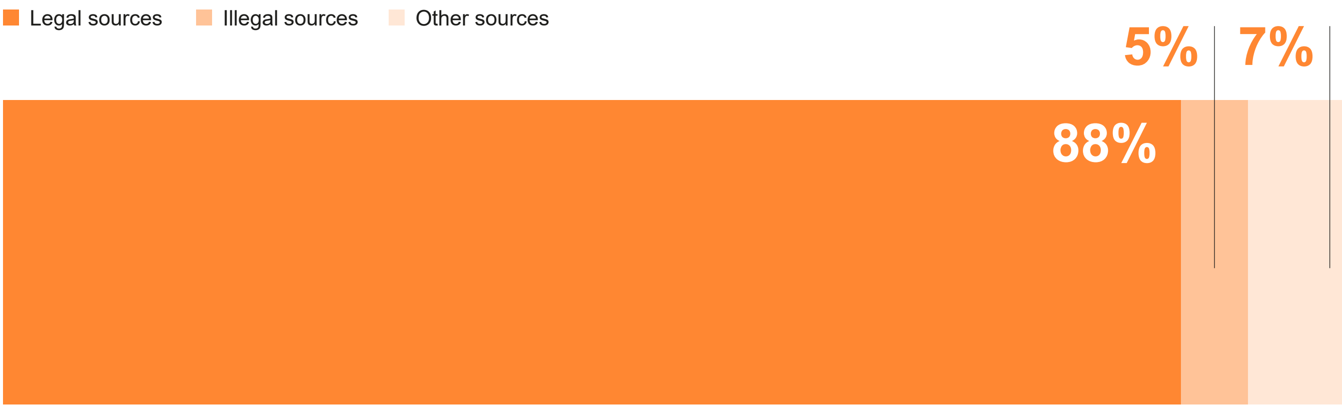
(% difference to 2020)



The overall level of infringement (i.e. anyone using an illegal source to access video games in the previous three months) remained unchanged compared to last year at 10%. There were no notable shifts in the type of infringement.

Illegal sources accounted for 5% of all video games that were accessed.

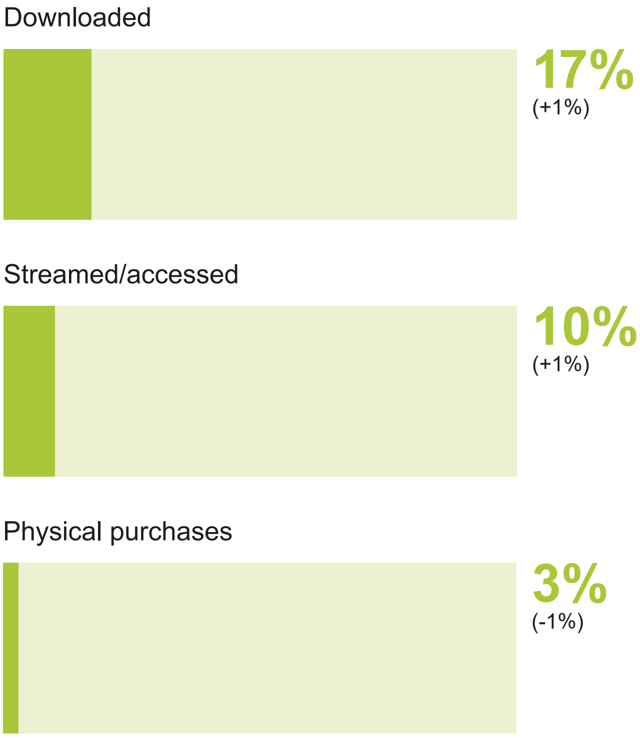
% share of video games accessed



Software

Engagement (past three months)

(% difference to 2020)

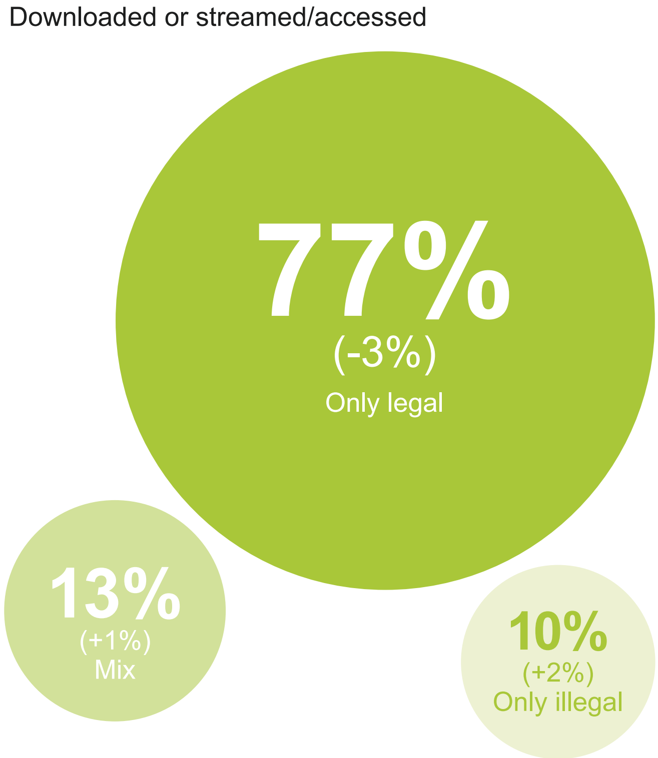


Downloading (17%) was the most common way of accessing software. This was followed by streaming (10%) and physical purchases (3%).

There were only small changes (+/-1%) compared to last year across all forms of engagement with software.

Infringement among software consumers (past three months)

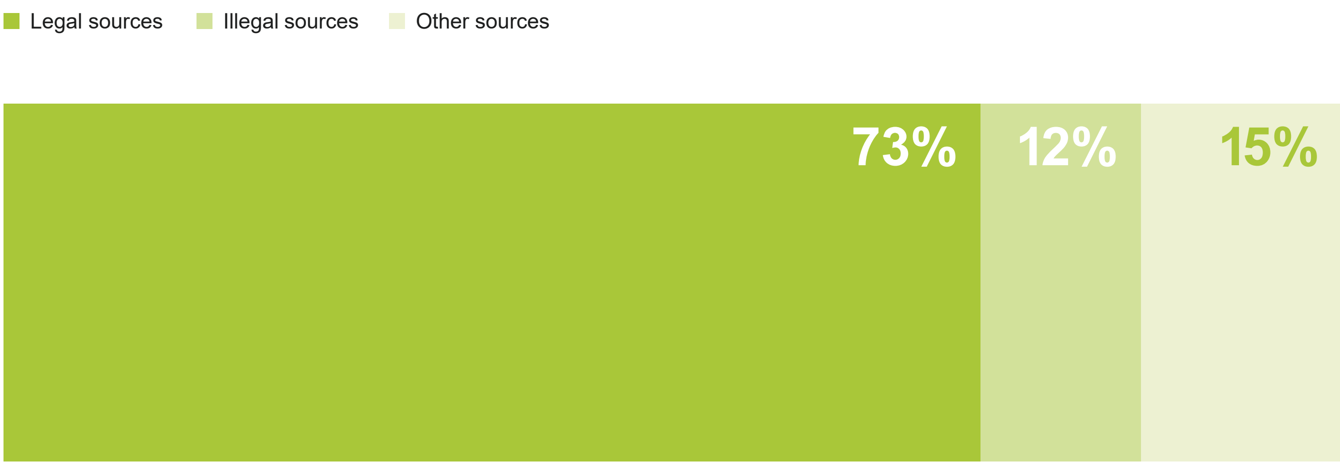
(% difference to 2020)



The overall level of infringement (i.e. anyone using an illegal source to access software in the previous three months) increased by 3% compared to last year, to 23%.

Illegal sources accounted for 12% of all software that was accessed.

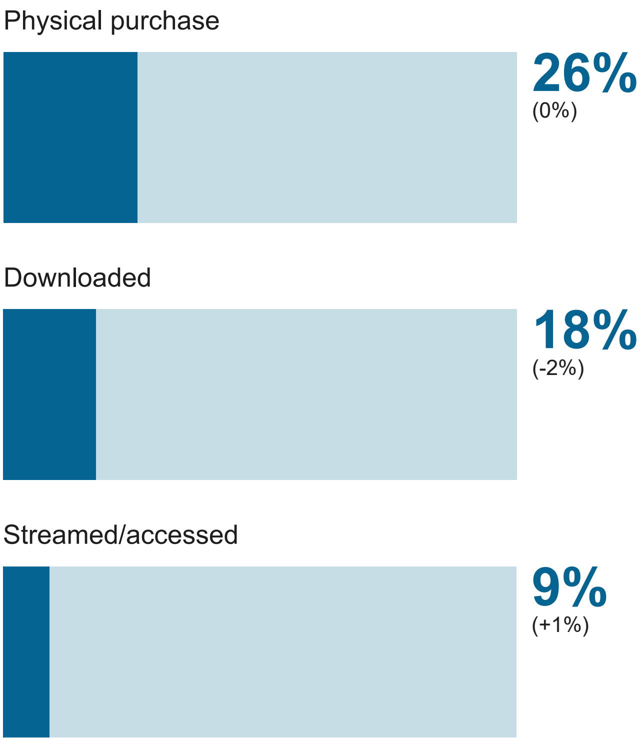
% share of software accessed



E-books

Engagement (past three months)

(% difference to 2020)

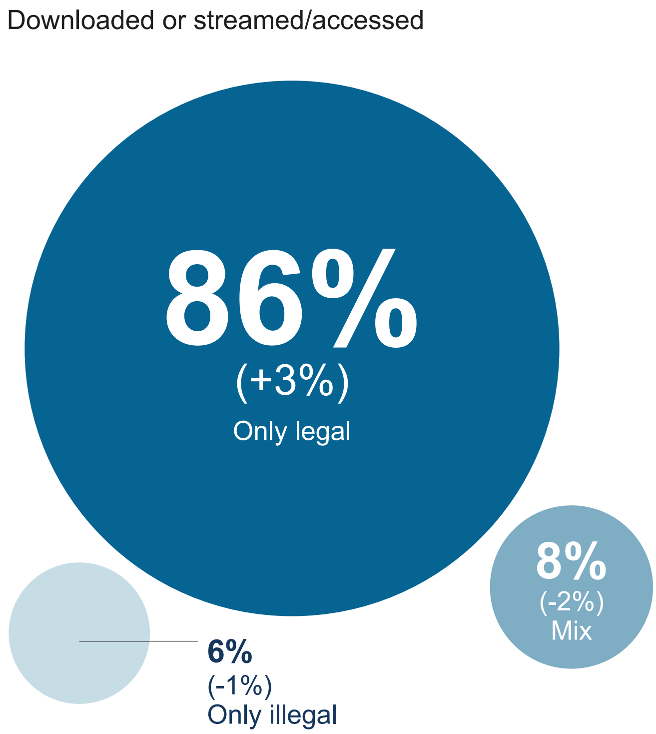


Physical purchases were the most common way of accessing books/e-books (26%). These were followed by downloading (18%) or streaming/accessing them (9%).

Downloading saw a small -2% decrease compared to last year. Both physical purchases and streaming/ accessing remained stable.

Infringement among e-book consumers (past three months)

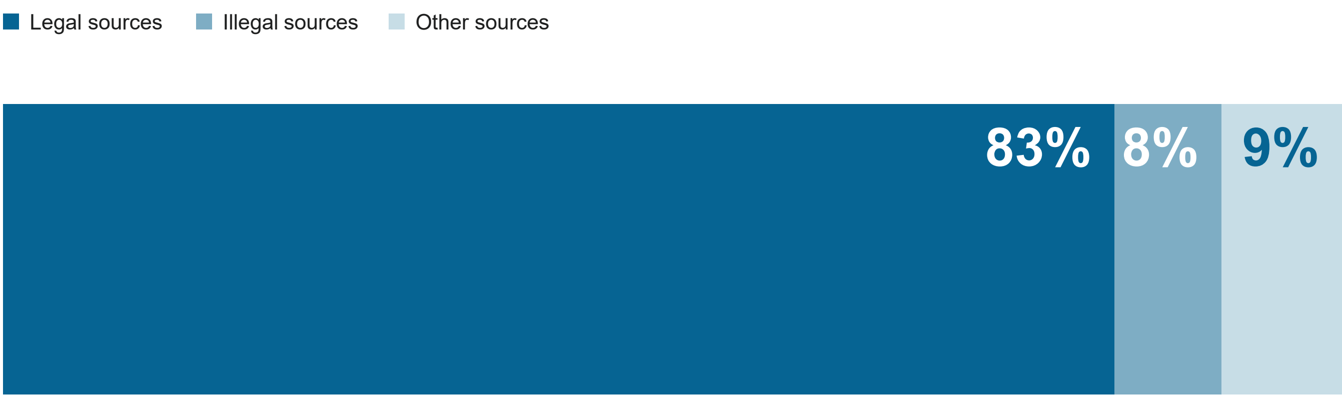
(% difference to 2020)



The overall level of infringement (i.e. anyone using an illegal source to access an e-book in the previous three months) decreased by 3% compared to last year, to 14%.

Illegal sources accounted for 8% of all e-books that were accessed.

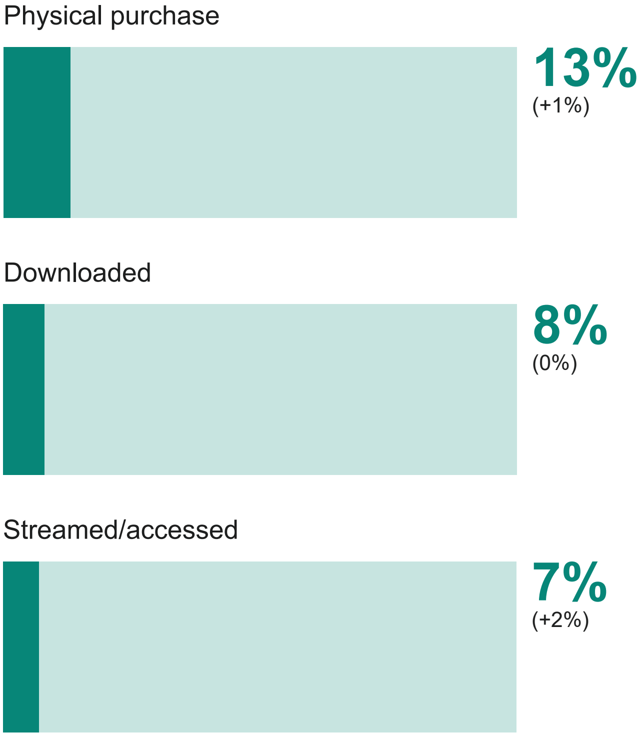
% share of e-books accessed



Digital magazines

Engagement (past three months)

(% difference to 2020)

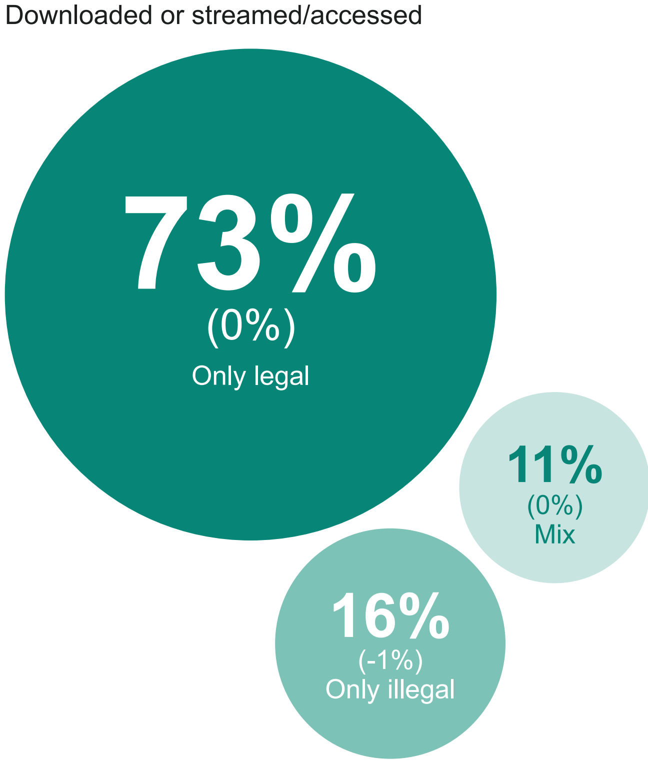


Physical purchases were the most common way of accessing magazines/digital magazines (13%). These were followed by downloading (8%) or streaming/ accessing them (7%).

Streaming/accessing digital magazines increased by 2% compared to last year. Both physical purchases and streaming/ accessing remained stable.

Infringement among digital magazines consumers (past three months)

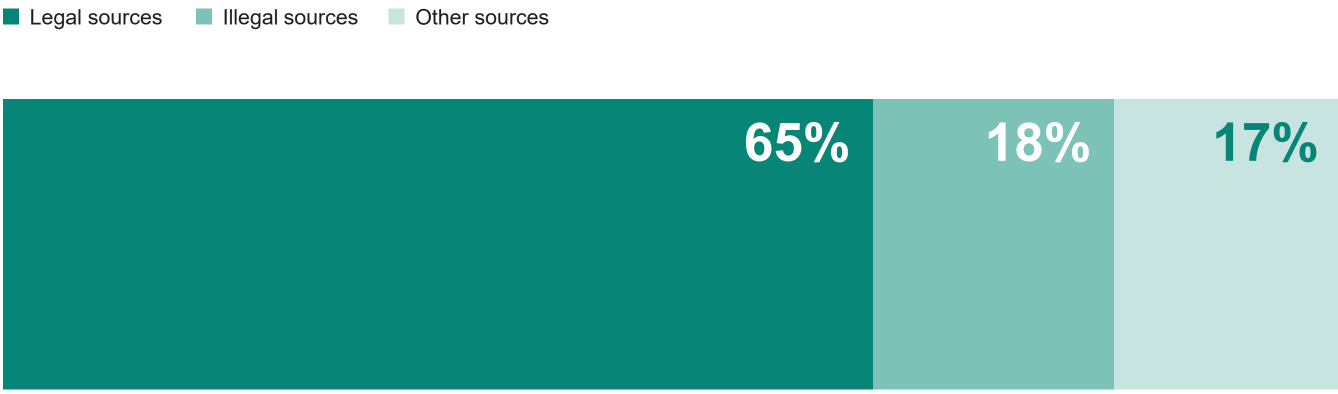
(% difference to 2020)



The overall level of infringement (i.e. anyone using an illegal source to access a digital magazine in the previous three months) remained steady compared to last year at 27% (a 1% decrease). There were no notable shifts in the types of infringement.

Illegal sources accounted for 18% of all digital magazines accessed.

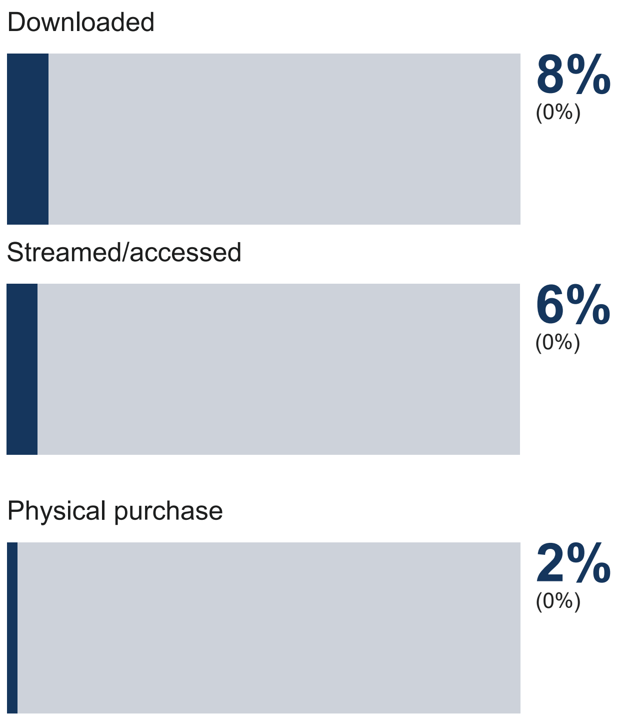
% share of digital magazines accessed



Audiobooks

Engagement (past three months)

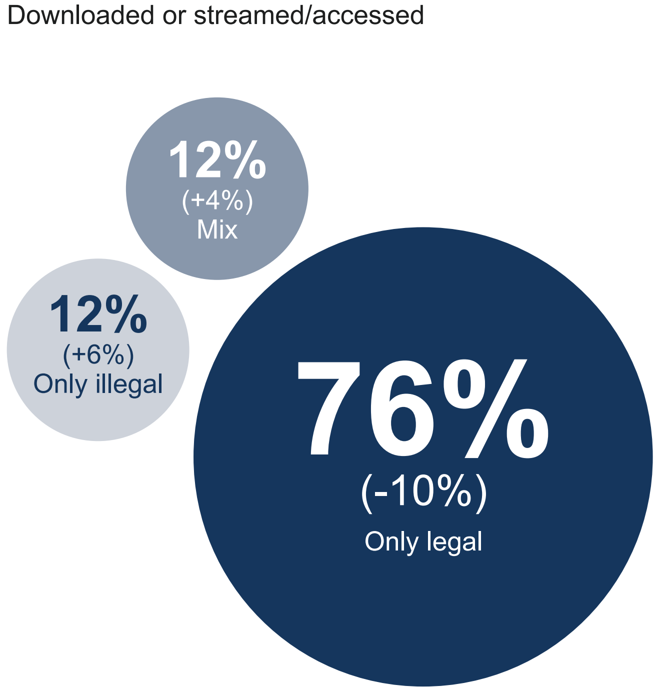
(% difference to 2020)



Physical purchases were the most common way of accessing audiobooks (13%). These were followed by downloading (8%) or streaming/accessing them (6%). There were only no changes compared to last year in engagement with audiobooks.

Infringement among audiobooks consumers (past three months)

(% difference to 2020)



The overall level of infringement (i.e. anyone using an illegal source to access an audiobook in the previous three months) increased by 10% to 24%. There were increases in those using a mix of legal and illegal sources and illegal sources only of 4% and 6% respectively.

Illegal sources accounted for 16% of all audiobooks that were accessed.

% share of audiobooks accessed

Overview and comparison of trends

This section provides an overview and comparison of key trends across each content category. It is based on the 2021 wave and includes yearly comparisons, where relevant. It covers engagement with online content, before looking in detail at levels of infringement, key characteristics of infringers and which legal sources they would be likely to migrate to.

Downloading

In this wave the number of respondents who had downloaded content in each category in the previous three months either increased or remained steady in most categories compared to the previous wave. Despite this, in all but one category (film), the proportion downloading remained lower than the peaks seen in Wave 9 (pre COVID-19).

- The largest increases between Wave 10 and 11 were for music, film and TV which all increased by 3%.
- Digital magazines increased by 2%, with either 1% increases or no change in video games and audiobooks.
- There was a 1% decrease in software and a 2% decrease in e-books.

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

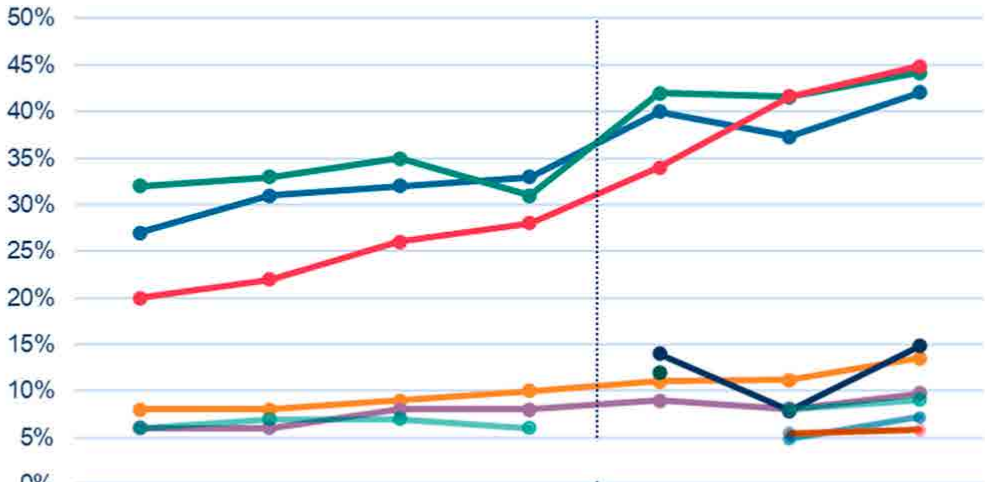
	Wave 5 (2015)	Wave 6 (2016)	Wave 7 (2017)	Wave 8 (2018)	Wave 9 (2019)	Wave 10 (2020)	Wave 11 (2021)
Music	24%	22%	21%	21%	31%	23%	26%
TV programmes	9%	10%	11%	9%	22%	16%	19%
Films	9%	10%	11%	9%	18%	18%	22%
Video games	8%	8%	9%	10%	18%	16%	17%
Software	9%	8%	9%	9%	20%	18%	17%
E-books	11%	10%	10%	9%		20%	18%
E-publishing					18%		
Digital magazines						6%	7%
Audiobooks						8%	8%

Base for Wave 11: n=5,000 (total sample). Break in the series between Wave 8 and Wave 9 represents change in methodology.

Streaming/accessing

In this wave no categories saw a decrease in the proportion who had streamed content in the previous three months with most seeing small or large increases. All categories were at the highest point we have seen in this study so far which is markedly different to the previous wave where there were big increases for some categories (e.g. film) and decreases for others (e.g. live sport, music).

- The largest increases from Wave 10 to Wave 11 were for live sport (Wave 10 - 7%) and music (5% - Wave 10). The former of which, now at 16% is in line with Wave 9 where it was 15%.
- There were smaller increases in other categories; 3% in TV and film and 2% in video games, software and digital magazines.
- E-books and audiobooks both remained stable.



	Wave 5 (2015)	Wave 6 (2016)	Wave 7 (2017)	Wave 8 (2018)	Wave 9 (2019)	Wave 10 (2020)	Wave 11 (2021)
Music	27%	31%	32%	33%	40%	37%	42%
TV programmes	32%	33%	35%	31%	42%	42%	44%
Films	20%	22%	26%	28%	34%	42%	45%
Video games	8%	8%	9%	10%	11%	11%	13%
Software	6%	6%	8%	8%	9%	8%	10%
Live sports					14%	8%	15%
E-books	6%	7%	7%	6%		8%	9%
E-publishing					12%		
Digital magazines						5%	7%
Audiobooks						5%	6%

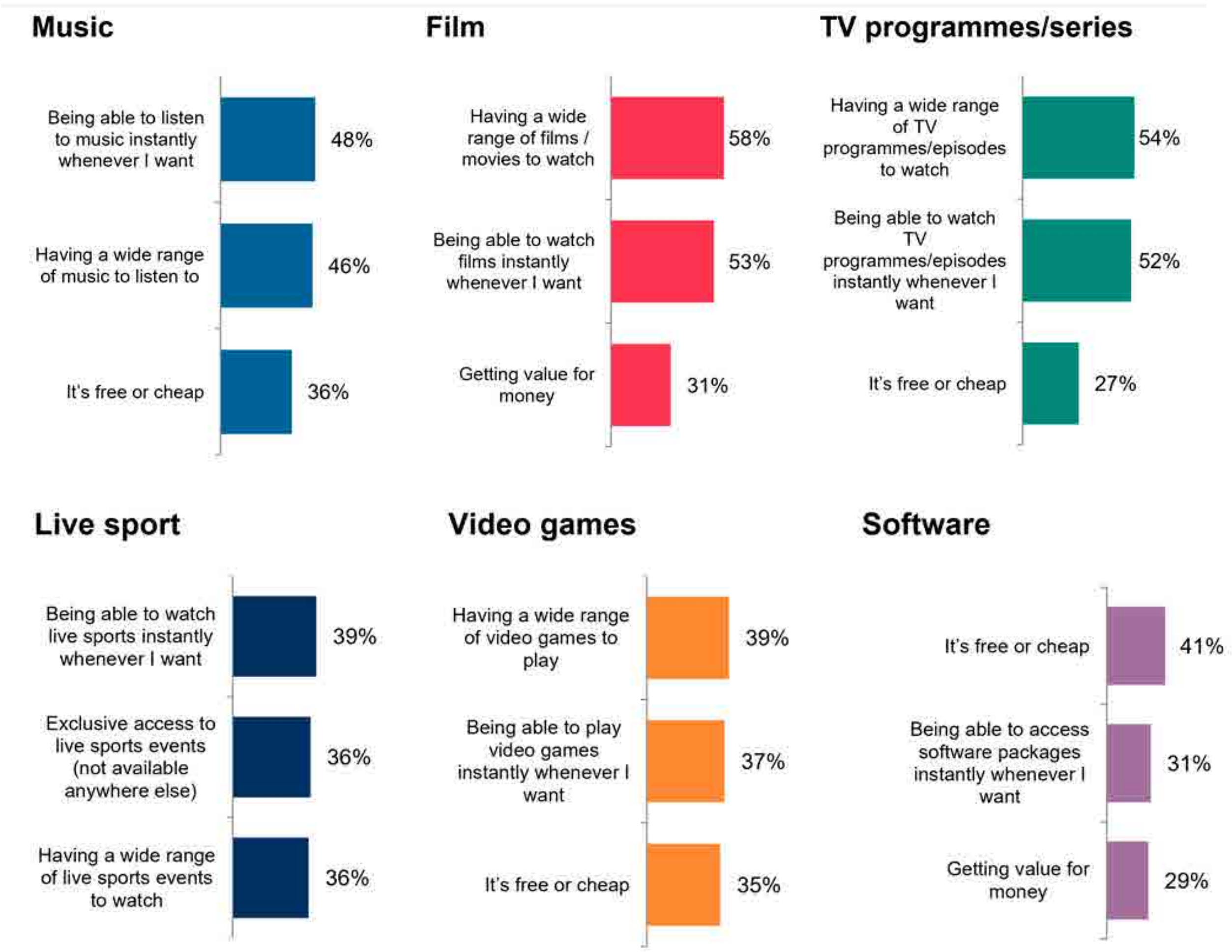
Base for Wave 11: n=5,000 (total sample). Break in the series between Wave 8 and Wave 9 represents change in methodology.

Reasons for accessing content online

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

- **Choice and variety.** Having a "wide range" of content was top in film, TV programmes/series, video games and audiobooks and was in the top three reasons in all categories apart from e-books (where it was fourth with 40%).
- **Immediate access to content.** Being able to access "instantly whenever I want" was the top selected reason in music, live sport and e-books and was in the top three for all other categories.
- **Cost-effective** way to access content. This was particularly the case for the statement "it's free or cheap", which was the most selected reason in software and digital magazines by a considerable margin and was in the top three for all apart from film and live sport. In film and software, online access was thought to offer "value for money" which was not in the top three for other categories.

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)



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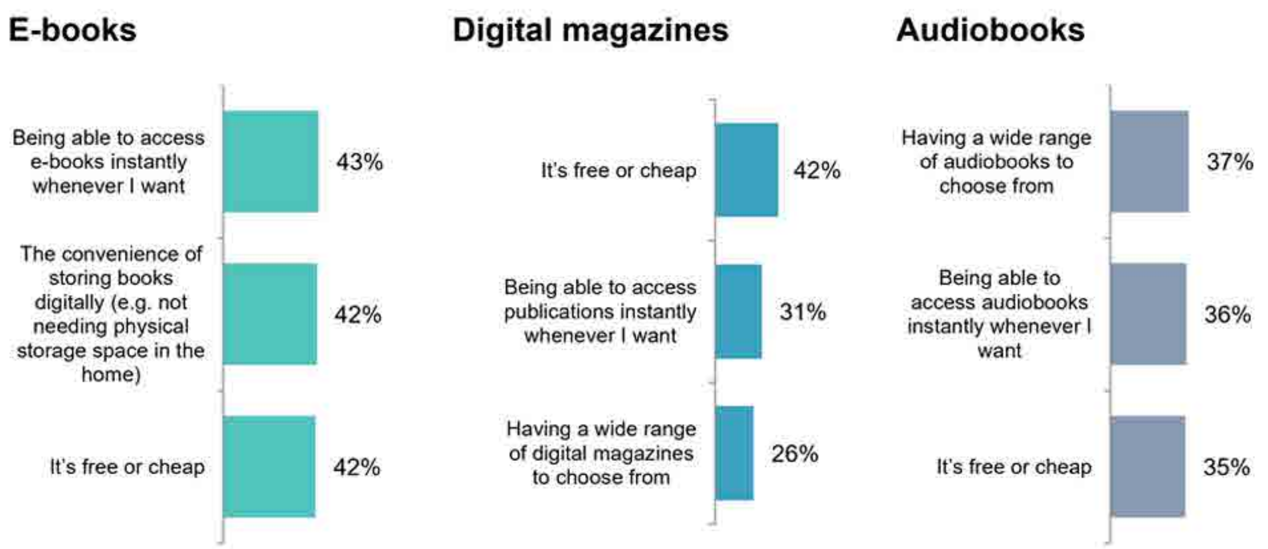


Base: those who downloaded, streamed or accessed content in each category (music = 2,347, film = 2,412, TV programmes/series = 2,377, live sport = 717, video games = 1,028, software = 979, e-books = 1,052, digital magazines = 547, audiobooks = 492)

Infringement trends

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

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

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

Overall infringement

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

The overall level of respondents who had infringed across any category (excluding digital visual images[1]), increased by 2% to 25% compared to the previous wave. This is the same level as it was between Waves 6-9.

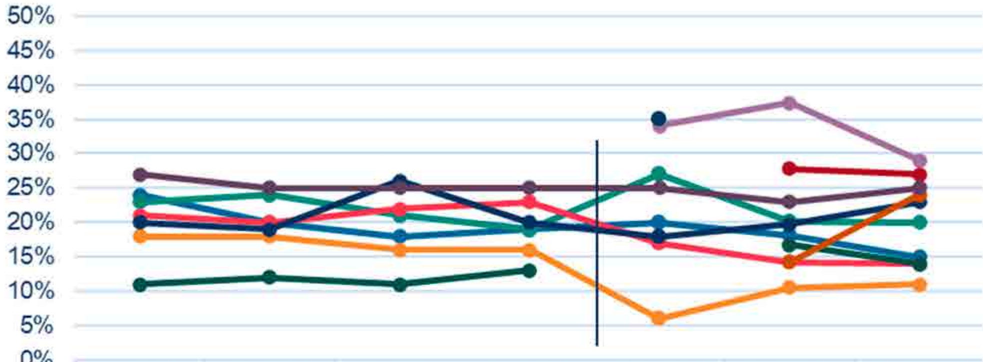
In most categories the proportion of the sample who had infringed remained stable or decreased with a couple of instances where it increased:

- The largest decrease in the proportion who had infringed between Wave 10 and 11 was in live sport where it fell by 8% to 29%. This is also 5% lower than the pre COVID-19 levels seen in Wave 9 in 2019.
- Music saw a 3% decrease between Wave 10 and 11 to 15%. This has taken it to the lowest point seen in the study so far.
- E-books decreased by 3% to 14% from the previous wave which had been the highest point seen in the study. It remained in line with what we saw in Wave 8 (13%) and slightly higher than in Waves 5-8 (11-12%).
- There were several categories where there were no changes. This was the case for both film and TV where the proportion infringing remained unchanged at 20% and 14% respectively. In both cases the level of infringement remained at the lowest points we have seen in the study so far.
- Digital magazines, in the second year it was included, decreased by 1% to 27%.
- Video games was also unchanged but was also 5% lower than in Wave 9. It is important to note that new illegal options were added to the survey in Wave 10.
- There was a 3% increase in software which took the total amount who had infringed to 23%. This is higher than most previous waves but is still below the 26% seen in Wave 7.

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

- At 24%, the proportion who had infringed in audiobooks was 10% higher than the previous wave which was also the first time this category was included in this study. It is important to note that there was an addition this wave to the infringement sources asked about ("Streaming audiobooks for free from sites such as YouTube").

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



	Wave 5 (2015)	Wave 6 (2016)	Wave 7 (2017)	Wave 8 (2018)	Wave 9 (2019)	Wave 10 (2020)	Wave 11 (2021)
Music	24%	20%	18%	19%	20%	18%	15%
Films	23%	24%	21%	19%	27%	20%	20%
TV	21%	20%	22%	23%	17%	14%	14%
Video games	18%	18%	16%	16%	6%	11%	11%
Live sports					34%	37%	29%
Software	20%	19%	26%	20%	18%	20%	23%
E-publishing					35%		
E-books	11%	12%	11%	13%		17%	14%
Digital magazines						28%	27%
Audiobooks						14%	24%
ANY	27%	25%	25%	25%	25%	23%	25%

Base for 2021: 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 = 391, film = 465, TV programmes/series = 316, live sport = 198, video games = 100, software = 184, e-books = 140, digital magazines = 125, audiobooks =108)

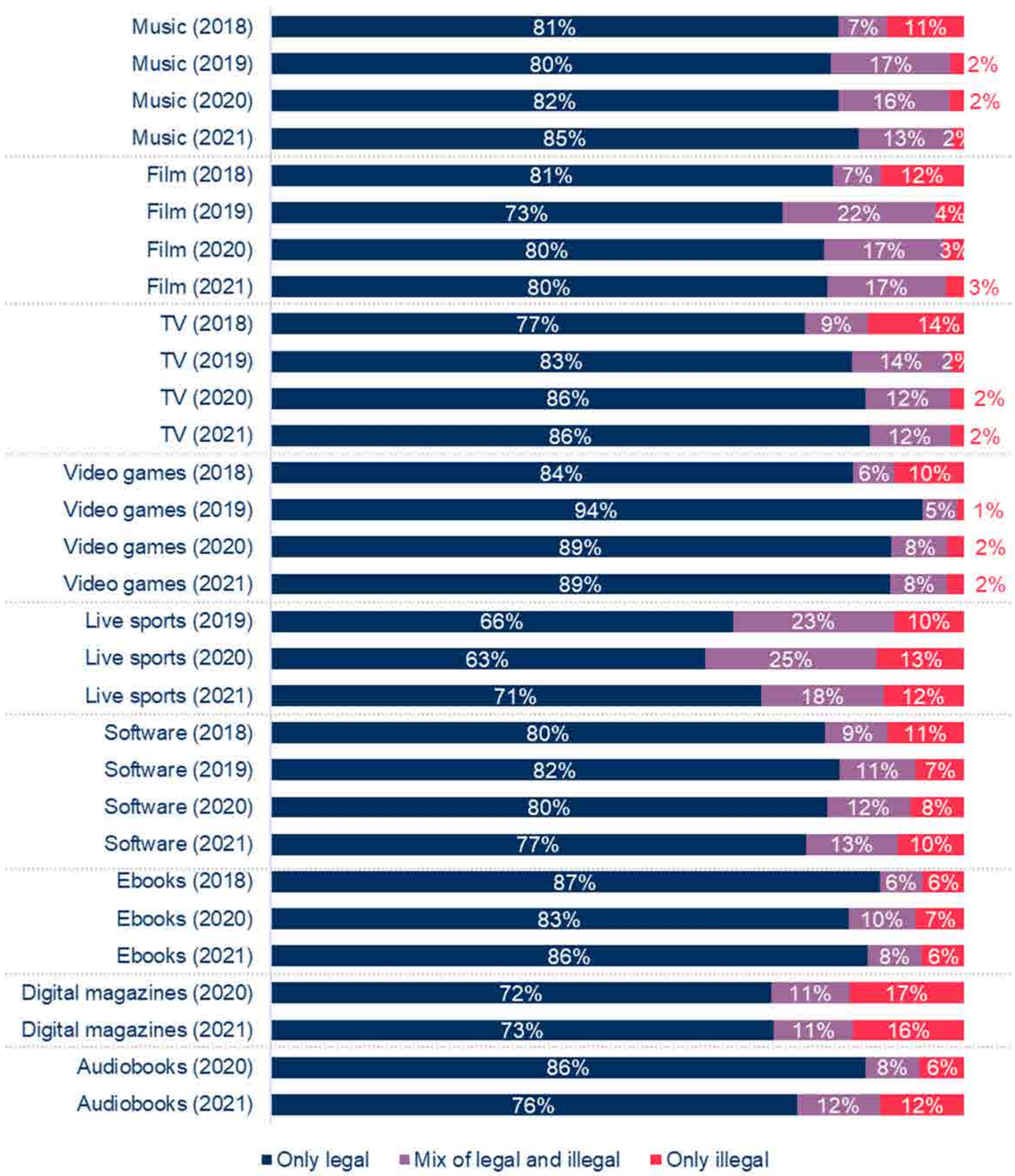
Types of infringement

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 categories including **film, TV, video games** and **digital magazines,** where the overall proportion of respondents using illegal sources remained unchanged, we also saw the same split between those using only illegal sources and those using at least some legal sources (i.e. being categorised as using a "Mix of legal and illegal sources"). There were several additional trends evident in other categories:

- In **live sport** the 8% reduction in infringement was largely driven by a 7% decrease in those using a mix of legal and illegal sources to 18%. The number using only illegal sources decreased by 1% to 12%. Live sport continued to have the largest proportion of any category using a mix of legal and illegal sources, but is now only 1% ahead of film (in the previous wave the difference was 8%).
- In **audiobooks** the increase in the proportion using only illegal sources was in both those using only illegal sources (6% increase) and a mix of legal and illegal ones (4% increase).
- In **music** we saw a 3-4% decrease in those using a mix of legal and illegal sources compared to the previous two waves while the small number using only illegal sources remained unchanged at 2%.

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



Base for 2021: those who have consumed content (i.e. downloaded or streamed/accessed) at least once in that category during the past 3 months. “Download/access for free from the internet, without really being sure where it comes from” does not count as either legal or illegal and those who only selected this option not included in the base (music = 2,294, film = 2,383, TV programmes/series = 2,349, live sport = 690, video games = 960, software = 855, e-books = 989, digital magazines = 457, audiobooks = 463)

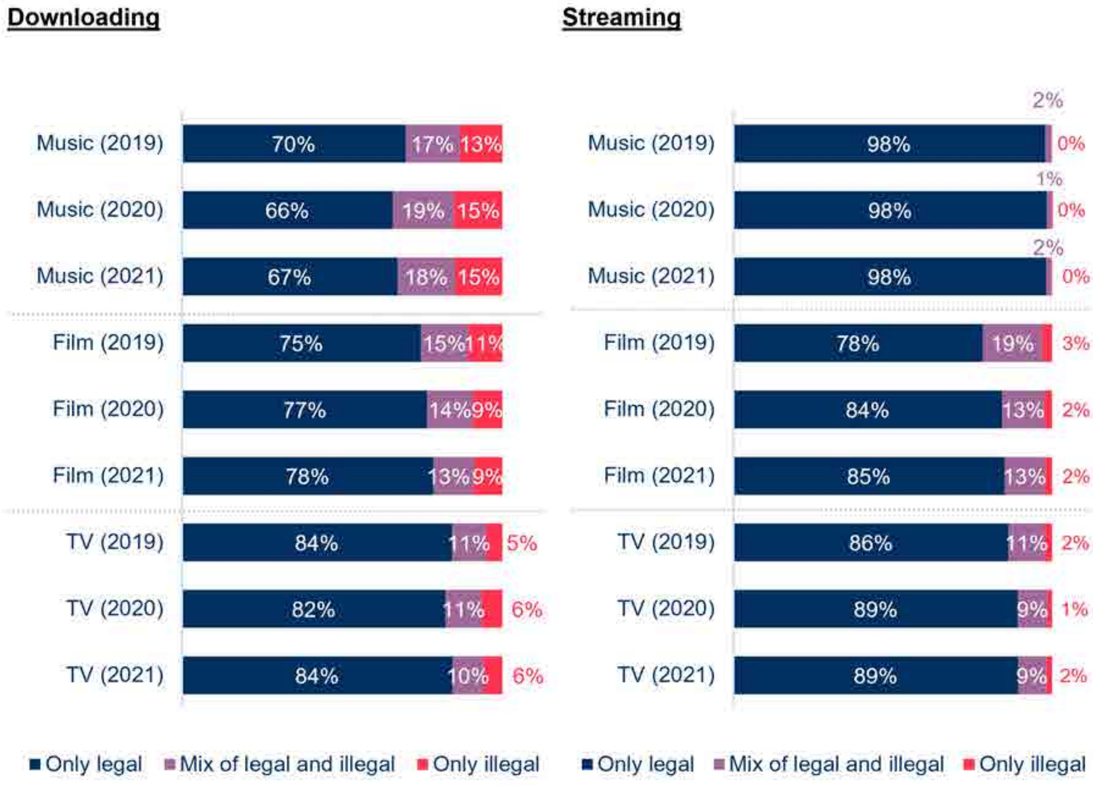
The difference between downloading and streaming

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

- Music continued to have considerably lower levels of infringement for streaming with 2% using a mixture of legal and illegal sources and 0% using only illegal sources. The proportion using illegal sources to download remained, at 33%, stable compared with the previous wave and also continued to be considerably higher than both film (+11%) and TV (+17%).

- Film remained unchanged compared to the previous wave in terms of those who use illegal sources to download and stream. Compared to music it also had a higher proportion using illegal sources to download (22%) than to stream (15%) although this difference wasn't as pronounced.

- TV also remained unchanged compared to the previous waves in terms of those using illegal sources to download and stream. Compared to both music and film it saw fewer people using illegal sources to download (16%) or stream (11%).



Base: 2021 for downloading: those who have downloaded content at least once in that category during the past 3 months. "Download for free from the internet, without really being sure where it comes from" does not count as either legal or illegal and those who only selected this option not included in the base (music = 1,185 , film = 1,015 , TV programmes/series = 862) 2021 for streaming: those who have streamed content at least once in that category during the past 3 months. "Stream for free from the internet, without really being sure where it comes from" does not count as either legal or illegal and those who only selected this option not included in the base (music = 2,041 , film = 2,179 , TV programmes/series = 2,162)

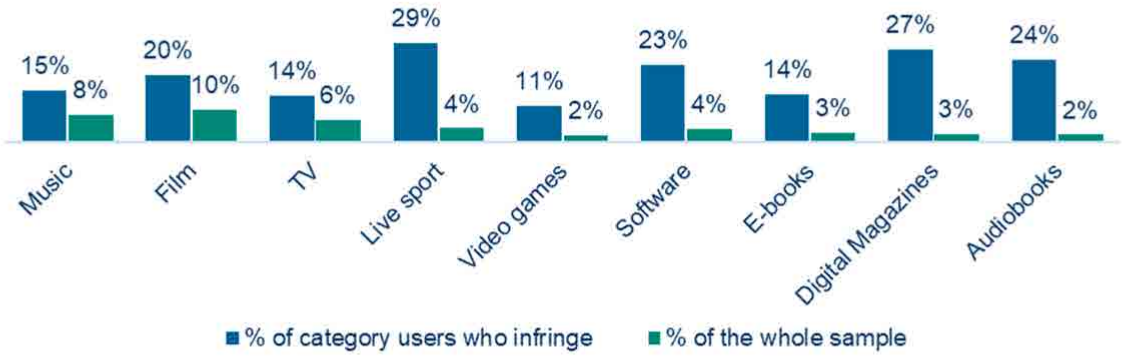
Infringer profiles

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

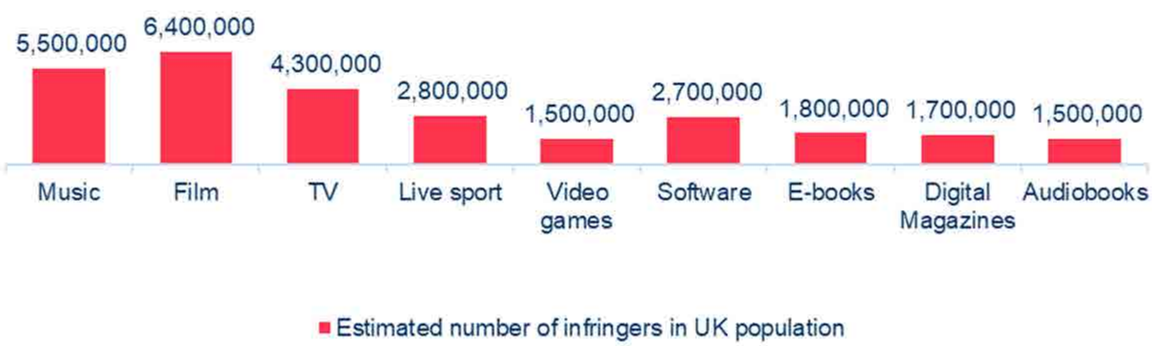
Base sizes for infringers (in each content category) are inclusive of anyone who has used an illegal source within the last 3 months.

- Live sport (29%) and digital magazines (27%) had the highest rates of infringement among those who consume each type of content.
- Film (20%), music (15%) and TV (14%) had lower levels of infringement but more infringers overall. For example, for film this was 9% of our total sample, which equates to approximately 6,400,000 people in the UK.

Infringement in each category and whole sample (%)

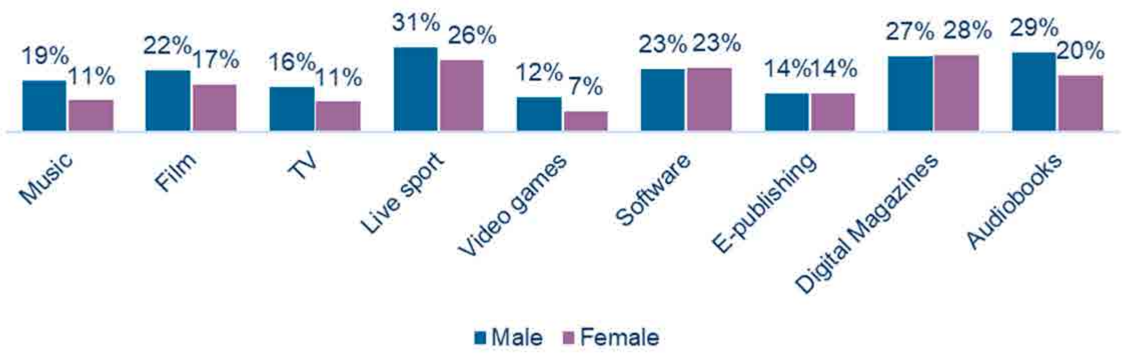


Estimated number of infringers for each category in UK population



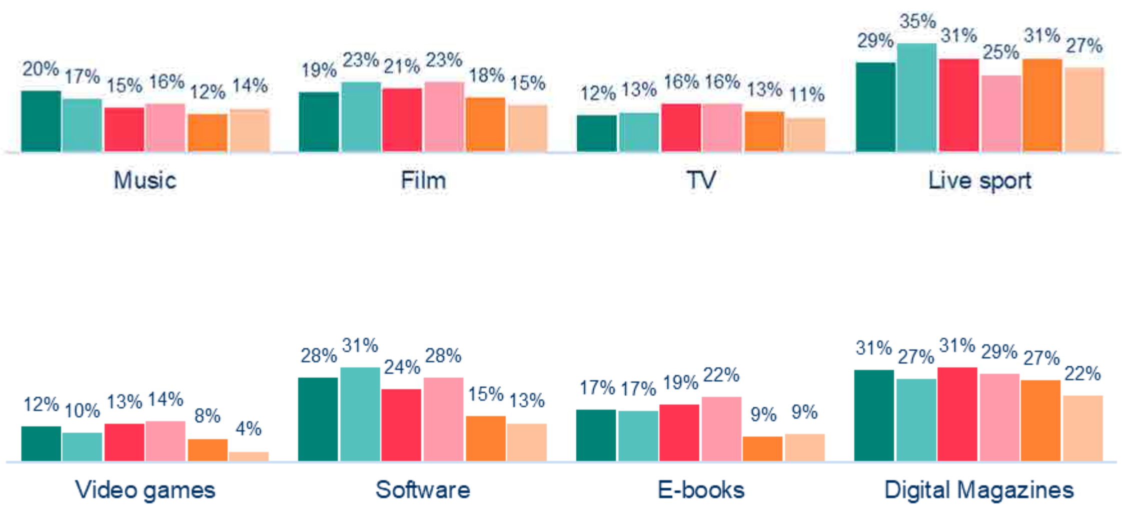
- For most categories, **men were more likely to infringe than women.** The infringement gap was largest for audiobooks (+9%), music (+8%), live sport (+5%), film (+5%), and video games (+5%).
- There was little difference between genders for software, e-books and digital magazines.

Infringement in each category by gender (%)



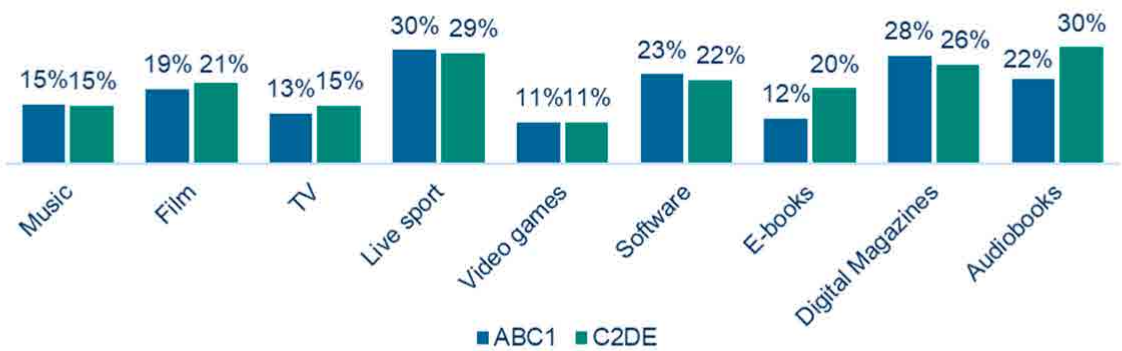
- When looking at age, film, TV, video games and software had a relatively **even spread of infringement** with a slight drop off among those aged 55 and older.
- Respondents aged 16-24 were the **most likely to infringe in a number of categories.** These included film, live sport, software, and audiobooks.
- Live sport was unique in that **older respondents were more likely to infringe;** 45-54 (41%) and 55+ (39%) were the two age groups with the highest rates of infringement. With audiobooks, there was a drop off in infringement after the 12-15 age group and, from there, the **rate of infringement rose steadily with age.**

Infringement in each category by age (%)



- There was an even spread of infringement levels across social grades for most categories. E-books (+8% C2DE) and audiobooks (+8% ABC1) had the largest differences in infringement levels.

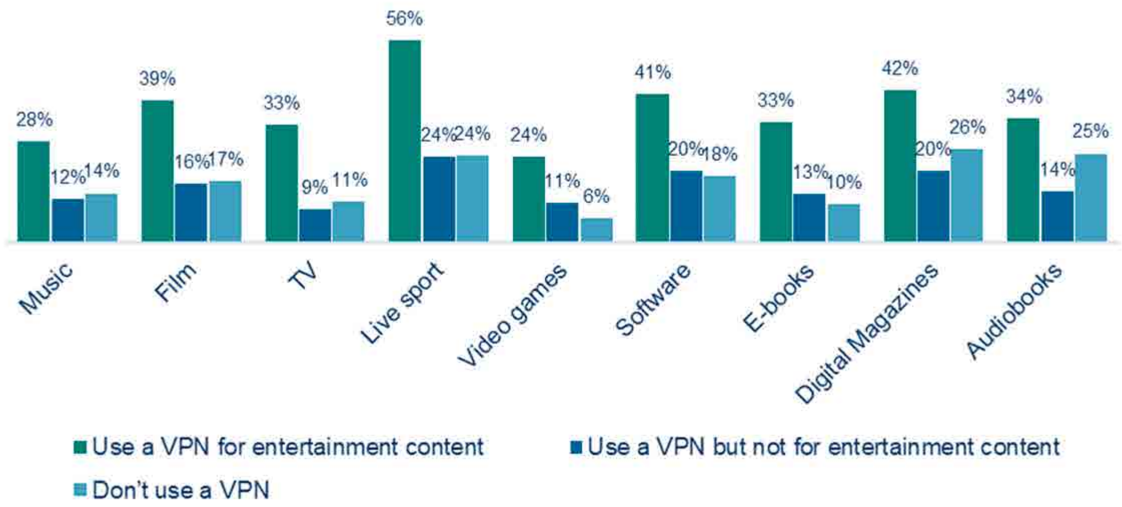
Infringement in each category by social grade (%)



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

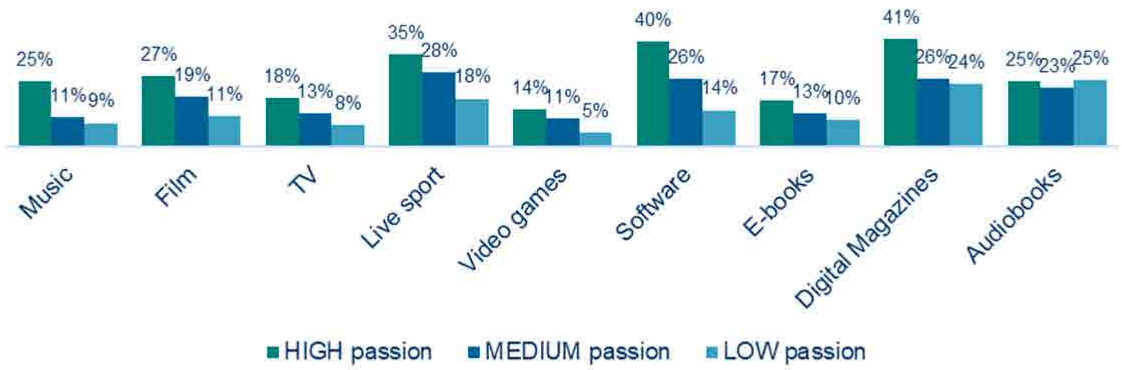
- For most categories, levels of infringement were similar for those who used a VPN (but not for entertainment content) and those who did not use a VPN at all.

Infringement in each category by use of VPN (%)



- Across several categories there was a pattern of those with the highest **passion[2] being most likely to infringe,** which subsequently declined in those with medium and low levels. This was most evident in digital magazines, software and music where the infringement levels decreased by 15-14% from high to low passion levels.

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 = 391, film = 465, TV programmes/series = 316, live sport = 198, video games = 100, software = 184, e-books = 140, digital magazines = 125, audiobooks =108)

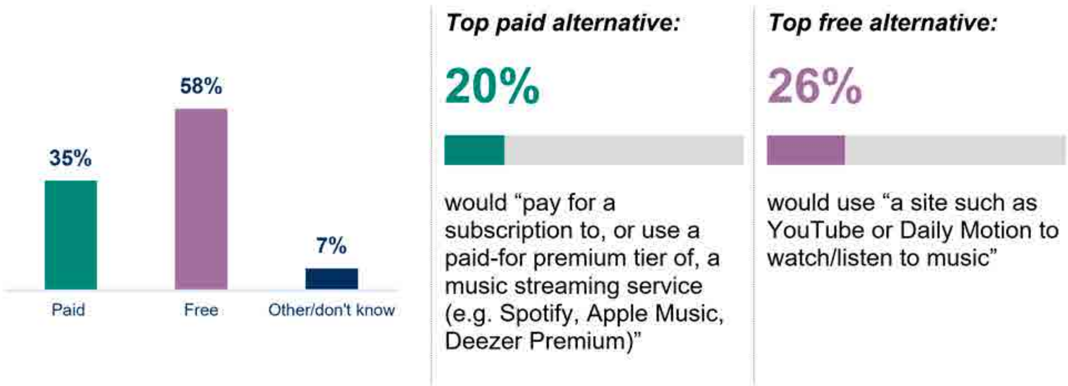
2 Passion levels were derived by scoring answers to a range of statements. The full list of statements can be found in the category sections of the report. They were scored on the basis of strongly agree=1, agree a little=2, disagree a little=3; strongly disagree=4. "High" was a score of 6-12, "Medium"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

Reducing infringement

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

- Paid sources were most commonly selected for **video games** (61%) and **live sport** (59%). This was closely followed by **film** (55%), **e-books** (54%) and **TV** (52%).
- Respondents were more likely to select paid options for **e-books** (54%) compared to **audiobooks** (48%) and **digital magazines** (46%).
- While **music** had the lowest proportion saying they would migrate to a paid source, still as much as a third (35%) potentially would. The most common free music source used was “a site such as YouTube or Daily Motion to watch/listen to music” (26%).

Music



Film

TV

Top paid alternative:

33%

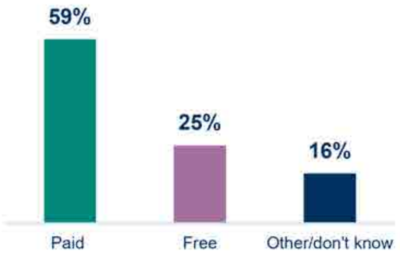
would use a "paid subscription to an online video streaming service (Netflix, Amazon Prime Video, NowTV etc.)"

Top free alternative:

25%

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

Live sport



Top paid alternative:

24%

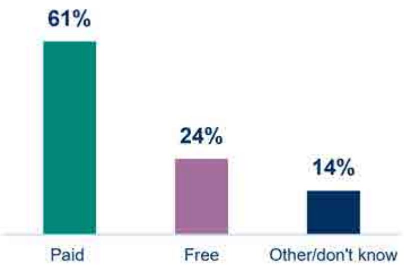
would "pay for a TV sports subscription (BT Sports, Sky Sports etc.)"

Top free alternative:

13%

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

Video games



Top paid alternative:

21%

would "buy physical copies of video games through stores"

Top free alternative:

30%

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

Software

Top paid alternative:

28%

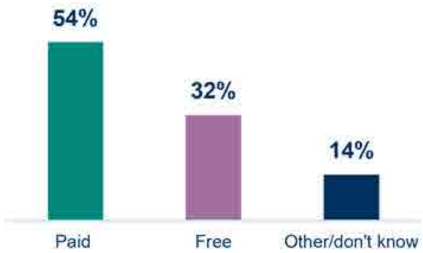
would pay "a single fee for an individual software package through a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook"

Top free alternative:

39%

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

E-books



Top paid alternative:

20%

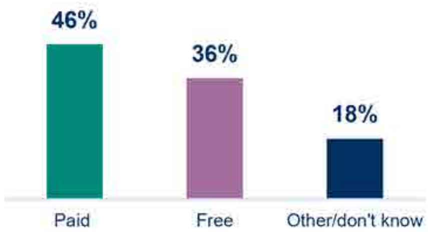
would "buy physical copies of books through stores"

Top free alternative:

17%

would access "digital or physical content made available online by a UK institution or library (e.g. at school, university, my local library etc.)"

Digital magazines



Top paid alternative:

19%

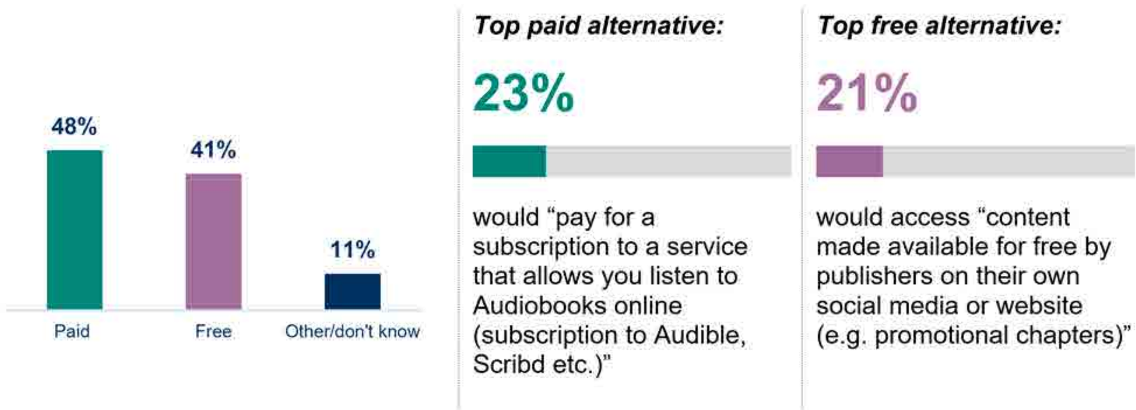
would "buy physical copies of magazines through stores"

Top free alternative:

36%

would access "content made available for free by publishers on their own social media or website (e.g. individual articles)"

Audiobooks



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Behaviour Change Opportunities - Qualitative Summary

Communications Testing

In the Online Community, participants were shown a range of messaging focussed on **showing the consequences of online piracy and infringement.** Having run communications testing since the inception of the qualitative element of the OCI project, there were two years' worth of prior findings around communications to build on. This year's exercise therefore concentrated on building on comms routes which were known to have potential and learn more about how to best execute these. However, new ideas in the form of hypothetical forms of intervention were also introduced to learn to what extent participants valued free access to content over the potential of facing real consequences for infringing.

The following types of messages were shown:

- Messages describing the impact of infringement on individuals in the creative industries, e.g. artists, producers etc.
- Messages about the prolonged impact of COVID-19 on creative industries.
- Messages describing the potential risks to consumers online in regard to malware and viruses.
- Hypothetical scenarios of consequences related to law enforcement and the impact on consumers.

Key Findings

- Apparent from last year's findings was that alluding to the negative financial impact of infringement on individuals within industries was more engaging than talking about industries as a whole. The communications testing this year managed to drill down further into which individuals to focus on and showed that participants found it hard to sympathise with big artists, producers, executives etc. who are seen to have a lot of money and success. Rather, speaking about smaller artists or smaller production companies as well as those individuals employed by industries in the background elicited more positive responses.
- Last year's exercise, conducted three months into the pandemic, saw an underwhelming response to messages related to the impact of COVID-19 on creative industries. There was a general sense from participants that these industries would bounce back with little long-term impact on their finances. One year on, however, with the pandemic ongoing at the time of research, messages about the continued strain on funds and reports of job losses were seen as some of the most impactful messages and caused some participants to reconsider their behaviour.
- With regards to potential risks, the threat of malware and other cyber related dangers tended to worry some less experienced infringers but not those who infringed regularly. Many said that while they did consider these risks to be concerning, they had built trust in the sources they used and that having never experienced any issues, they felt safe to continue using them. The notion of increased cyber security threats during the pandemic didn't seem to increase concern, with many saying they would remain vigilant and knew the warning signs of untrustworthy content to look out for.
- Finally, though of course the implementation of any punitive measures against infringement is a sensitive matter and the following findings are not intended as concrete recommendations, the exploration of hypothetical scenarios proved insightful. This exercise helped expose how participants evaluated the risk versus the reward of infringing. The idea which proved most effective in making participants reconsider infringing was the potential for internet providers to send warnings and eventually cut off internet access, followed by greater implementation and enforcement of fines.

Considerations for different consumers

As in previous years of the qualitative phase of this project, two main types of infringer stand out:

- **Savvy Infringers** who are experienced in finding different sources of free content and feel confident in their behaviours.
- **Cautious Infringers** who may infringe less regularly, be less certain about what exactly constitutes online infringement and be more concerned about any potential repercussions.
- Cautious Infringers:
    - As in previous waves, this year's findings indicate that messages such as the loss of jobs in industries or the risk of malware can certainly help deter some Cautious Infringers once they are made aware of such information.
- Savvy Infringers:
    - When it comes to Savvy Infringers, more is needed in order to persuade them to reconsider their behaviour.
    - There are indicators that messages which give tangible examples of job losses and impact on individuals within industries can make this group reflect.
    - However, the most effective messages to actually get this cohort to seriously reconsider behaviours are those which speak to greater enforcement of copyright law.
    - Given that enforcement is a sensitive area, other purely comms-related avenues to explore in future could include the potential deterioration in quality of content or decrease in the volume of content produced due to infringement.

Background and methodology

Background

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

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

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

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

Methodology

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

Stage 1: Online Survey

- Online data collection, with fieldwork taking place between 21/03/21 and 24/04/21
- 15-minute survey
- N=5,000
- Nat Rep of UK +12 population

Stage 2: Ongoing Qualitative Engagement

- Online Community, with fieldwork taking place between 17/05/21 and 21/05/21
- Mixture of research tasks, experimental conditions and discussion topics
- 5 days
- N=50
- Infringers aged 16+

Stage 1 – Online Survey

The eleventh wave used the same streamlined questionnaire that had been the basis of the OCI since Wave 9 in 2019. The main change compared to waves preceding the ninth wave was that a less direct approach was taken to finding out whether illegal sources are used, in order to encourage more honesty. More specifically, rather than asking this outright, respondents were shown a list of options and the classification of legal or illegal was done based on the options chosen.

Some additional changes were made to the questionnaire this year. Questions about how consumption of content in different categories had changed since COVID-19 were removed. A new section was also included which looked at the consumption of different types of live streaming content.

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

The survey took, on average, 12 minutes for respondents to complete. There was a dropout rate of 7%.

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

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

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

The past three waves (2019 to 2021) saw changes for some categories that impact comparability with previous data in relation to the e-publishing categories:

- In the ninth wave the e-book category was broadened out to include all e-publications.
- In the tenth wave e-publishing was split out into three separate categories (e-books, digital magazines and audiobooks) with the 'passion' questions still asked at an overall level for these three categories.
- In this wave the 'passion' questions were asked separately for e-books, digital magazines and audiobooks.

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; especially in the context of the ongoing COVID-19 pandemic and any impacts this may have had on infringement this year. As in previous years, it also sought to test and co-create communications materials to inform potential communications to be used by the IPO to facilitate positive behaviour change.

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

The Online Community took place from 17-21 May 2021. It is important to note the timing of this community was almost exactly 1 year and 2 months after national lockdown restrictions were first introduced in the UK. This means responses should be considered in the context of an extended period of social restrictions which meant that the daily lives of participants at the time of research were far from usual.

For reasons of qualitative validity (i.e. convergence of insights), **six** of the content categories were focused on **in-depth in the Community.** Due to the low numbers of the sample who consumed digital magazines, the qualitative research on e-publishing only focused on e-books. Whilst in last year's research live sports was not included as a core category in the qualitative phase due to the reduction in content as a result of the national lockdown, it was reintroduced this year given the recommencement of live sports events.

With the introduction of live streaming for the first time this year, no respondents were recruited specifically for this category as not much was known about it. Rather, all participants were asked a few questions about how and when they consumed live streams, with a view to building knowledge on this category for future waves.

While the quantitative stage of research provides the base of the tracker and remains consistent year on year, the qualitative element seeks to unpick the key opportunities for greater insight on certain topics and knowledge building for future communications work. Therefore, this year's Online Community focussed to a lesser extent on detailed consumption habits which had been investigated thoroughly in the previous two waves and made way for greater exploration of potential avenues for behaviour change and communications.

Number of Respondents (N=50):

- Music (N=9)
- TV (N=9)
- Film (N=8)
- Video Games (N=8)
- E-books (N=8)
- Live Sports (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 2021 data, with comparisons made with previous waves where relevant.

Each content category then has its own bespoke section, based on 2021 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 2019-2021 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.

Context - Life during the Covid-19 Pandemic and the impact of long-term social restrictions

Qualitative Summary

At the time of the qualitative discussions with participants in the Online Community in late May 2021, the UK had been subject to three major national lockdowns with social restrictions in place for over a year. These circumstances had a profound impact on participants and how they experienced daily life. It also meant that many valued online entertainment more in comparison to previous years as these forms of entertainment were part of a limited cohort of activities available to people.

In the previous OCI study a year earlier (June 2020), participants were already reporting feelings of frustration, stress and lowered mood having been under lockdown restrictions across the UK for 3 months. Now well into over a year of restrictions, many participants said they were feeling the strain of being largely restricted to their homes for such an extended period of time with little certainty about when lockdown measures would end. For some, the persistence of restrictions was further exacerbated by financial worries due to prolonged unemployment or receiving less income than usual on furlough.

The effect of the continual pressures of life under multiple lockdowns meant that many participants reported feeling mentally tired, stressed, worried or apathetic and many participants drew a direct link between the effects of lockdown and a decline in their mental health. A few participants commented that when the first lockdown was imposed over a year ago, there was a stronger sense of morale and greater efforts to combat being separated from others. However, these participants felt that such efforts had started to wear off the longer lockdown ensued, with little to combat the stress and boredom of life under prolonged restrictions.

Though some participants hadn’t been as negatively impacted as others and some, in fact, reported having benefited from a shift in lifestyle (e.g. preferring to work from home, not having to commute etc.), this cohort was also starting to feel a little jaded after substantial amounts of time at home and longed for social interaction with friends and family.

Coping mechanisms and the role of entertainment

Given the long term strain a lot of participants were feeling, methods of relaxing and escaping from day to day reality were important. While entertainment was a key component here, participants also mentioned calling friends and family to boost their mood, spending more time outside as the weather got a little warmer and some mentioned keeping active or doing exercise such as regular walking, yoga etc.

In terms of entertainment, participants felt attached to various content categories and said that these had served almost as 'companions' throughout the past year of lockdowns. The greatest benefits participants attributed to the entertainment categories as a whole were the distraction and escapism they offered. Participants said they were better able to take their minds off potentially stressful situations and mindsets during the past year and to control their moods by listening to music, watching TV, films and live sports, playing video games and reading. Another benefit mentioned for those in shared households was the ability to connect with others over particular content and create shared moments together in a time of relative isolation.

Overall, participants were very grateful for the ability to access the entertainment they had consumed and couldn't imagine the experience of the past year or the effect on their mental health without them.

"The whole last year was depressing and very tough. It was as if I was held captive in my house. The working situation was alright, but I had to work from home with no colleagues to support me or discuss with. Financially, I was not impacted but emotionally, I felt lonelier and the lack of a proper work environment made me less productive. I started to play more video games with my family and started watching more movies and TV series. The video games and movies gave me support and helped me to cope with this situation." - Female, 25-34

"Overall, I have found the past year extremely challenging both mentally & physically, like everyone else. The different emotions I have felt have ranged from anxiety to frustration, then anger to sadness due to the lockdowns. Life has changed for me only because before the pandemic I would have met up with my sisters often and not being able to continue to meet up has been so stressful for us all. I still feel a great need for certain activities or entertainment categories that have been helping me out during the lockdown such as working in my garden and watching lots of TV." - Male, 45-54

"In regard to my mood and wellbeing, previously I didn't really give it any attention. However, the past year made me more alert to my mental health. I had periods where I was just completely unhappy, worried and isolated. Then gradually I overcame that and started consciously doing things for myself. Music and movies are two activities that made the past year more enjoyable. I relied on music to improve my mood and occupy my mind. Watching movies made me laugh and gave me a point of conversation with others. Now that restrictions are starting to ease, I feel calmer but am still going to keep listening to music and watching movies."
- Female, 16-24

"The past year has been tough for obvious reasons: there's never been a day in this period where I didn't turn on my TV to check the news about Covid-19. Life changed on March 23 when Scotland entered the full lockdown but luckily, I was able to get furloughed and cope with the ongoing expenses. The second lockdown was even worse and tougher because of the length of the restrictions and because of the fact that no furlough was available for me (my company could not pay 10% of my wage) and therefore I had to rely on Universal Credit. Entertainment definitely helped me cope, especially reading, music and films." - Male, 25-34

Live streaming

In this wave, for the first time, there were questions on live streaming which aimed to take an exploratory look at the live streaming sector which has received a renewed focus since lockdowns due to COVID-19 restricted in-person events.

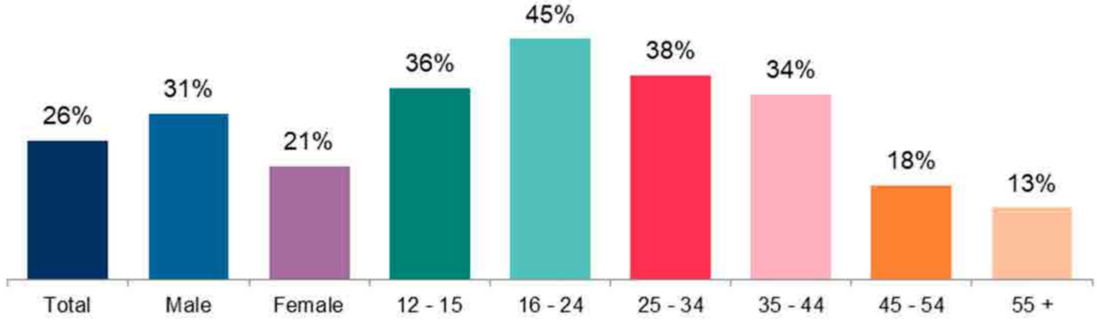
Respondents were given a definition of live streaming which was intended to capture a wide range of behaviour and included 'live' and pre-recorded events: "By this we mean events which were either streamed live (i.e. in real time) or were recordings of the live event."

Respondents were asked how often, if at all, they had watched live streams in the previous 3 months across a number of different types (e.g. music performances, video games, live comedy etc). If they had watched them, they were then asked how many they had watched and how they were split between events that were live/pre-recorded or paid/free as well as what sources they had used to access them.

Frequency and types of live streams

- Overall, around a quarter (26%) had watched a live stream in one of the categories.
- At 31%, this was 10% higher in male respondents than it was in females. It was also highest in those aged 16-24 (45%). This fell to between 35-38% in those aged 12-15, 25-34 and 35-44 and to 13-18% in the 45+.

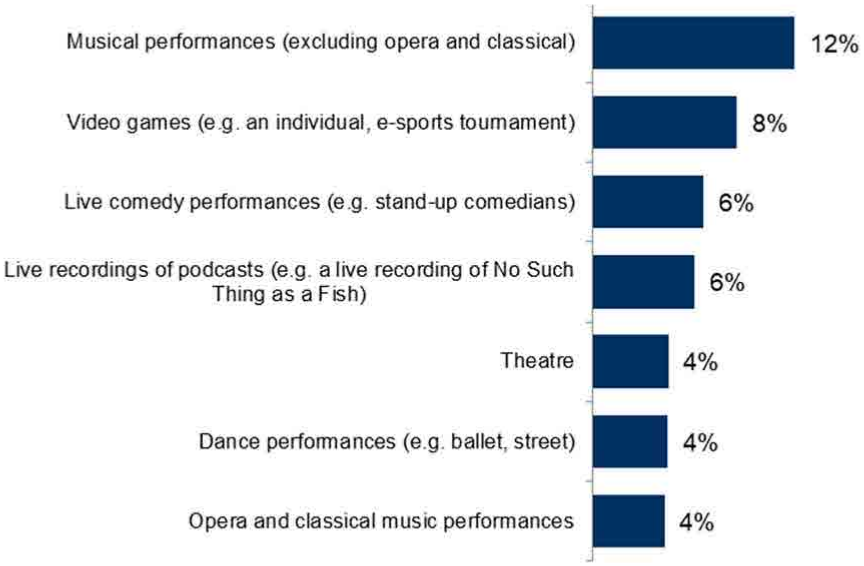
Have watched any live stream in the past three months



Base: total sample (n=5,000)

- Out of all the categories in question, respondents were most likely to have watched musical performances (12%).
- This was followed by video games (8%), live comedy performances (6%) and live recordings of podcasts (6%).
- Theatre, dance performances and opera and classical music performances were all watched by 4%.

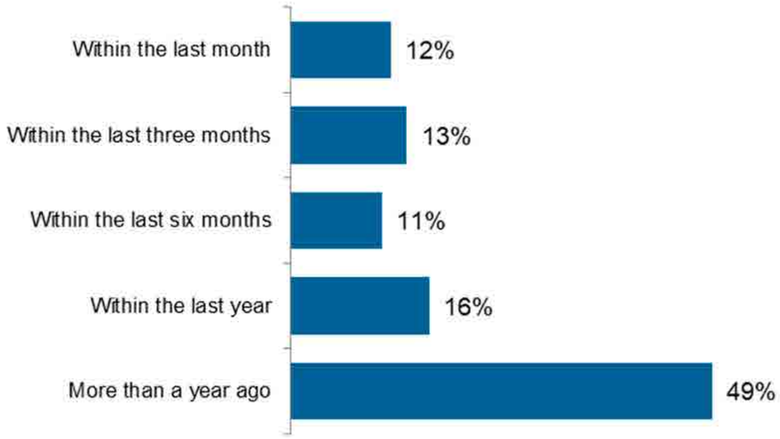
Have watched the following kinds of live streams in the past three months



Base: total sample (n=5,000)

- Respondents who had watched a live stream were asked when they had first done so. Around half (49%) had watched their first one more than a year ago.
- The remaining half (51%) had watched their first one within the last year, with around one in ten (12%) watching their first one within the last month.

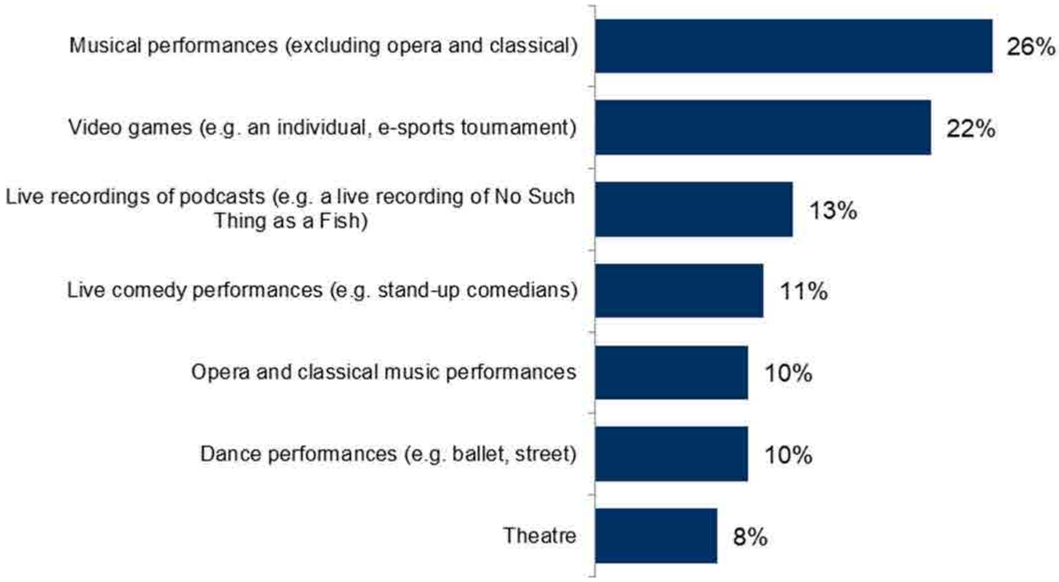
When did you watch your first live stream through the internet?



Base: Those who had watched a live stream in the past three months (n=1,228)

- If a respondent had watched a live stream in a certain category, they were asked how many they had watched in the previous three months. Across all categories they had watched, on average, 14 live streams over the previous three-month period.
- Looking at the share of live streams that were watched, musical performances accounted for around a quarter (26%). This was closely followed by video games which comprised just over a fifth (22%).
- All other categories each accounted for between 8-13% of live streams.

In the past three months how many live streams have you watched through the internet for each of the below? If you are unsure, just give your best estimate (% share of live streams watched)

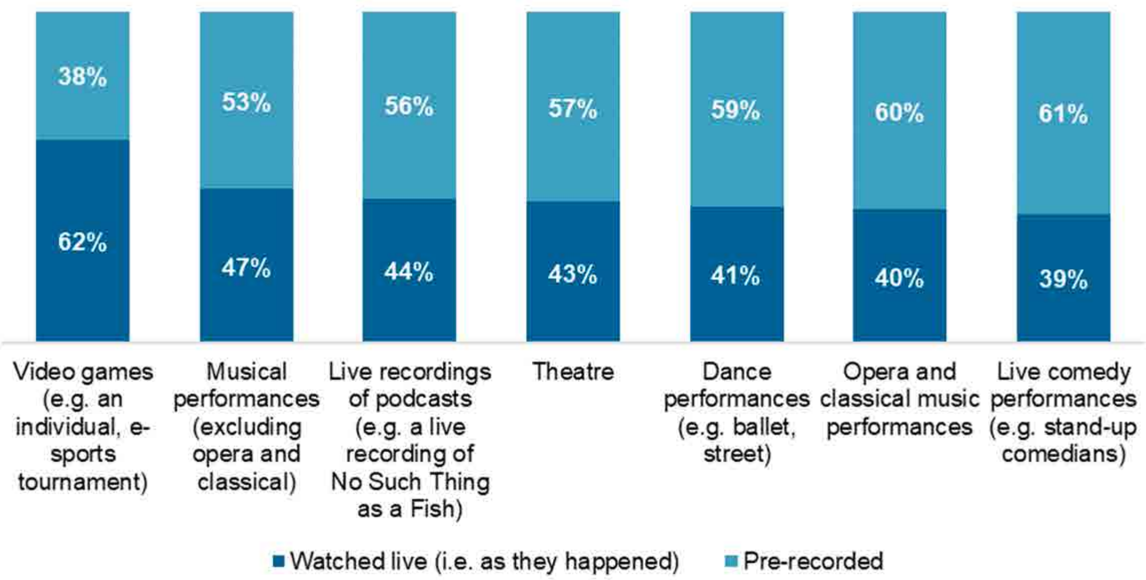


Base: Those who had watched a live stream in the past three months (n=1,228)

Type of live stream events

- Respondents were asked what the split was between events that they were either watching live (i.e. as they happened) or pre-recorded.
- Live streaming was highest for video games (62%) and ranged between 39-47% for all other categories.

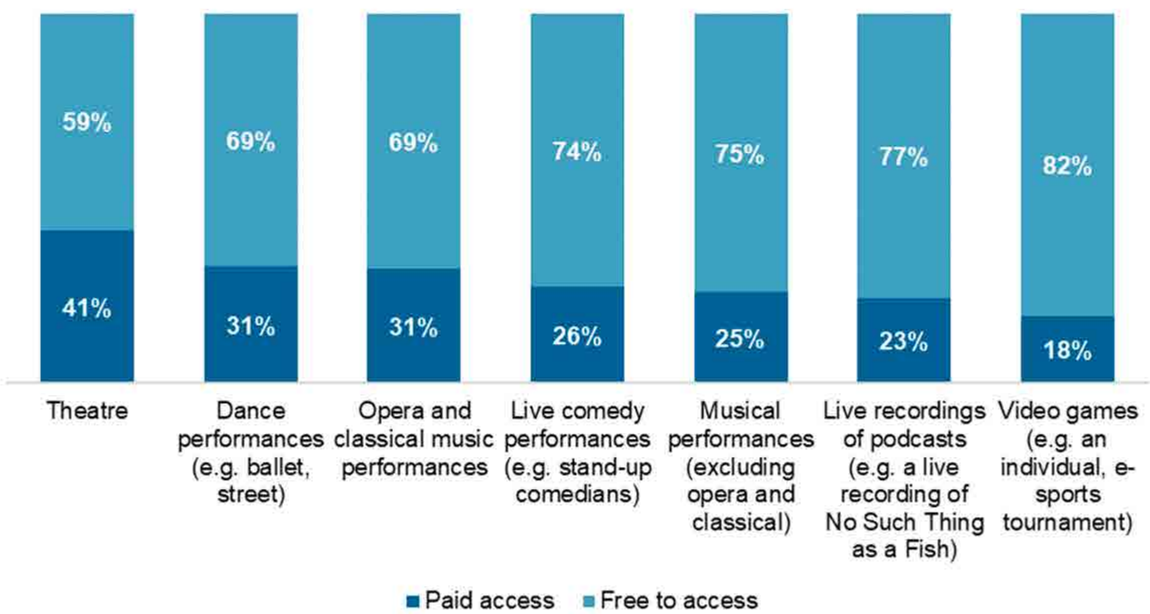
What percentage of the events that you live streamed in the past three months were...



Base: Those who had watched a live stream in the past three months (n=1,228)

- Respondents were also asked what the split was in the live streams they were watching between paid events and free ones.
- Paid events were in a minority in all categories although this was highest in theatre live streams (41%). This was followed by live streams of dance performances and opera and classical music performances where paid events each comprised around a third (31%).
- Paid events for live comedy performances, musical performances and live performances of podcasts each comprised around a quarter of events for each category (between 23-26%). Video game live streams were the least likely to be paid events (18% of all video game streams).

What percentage of the events that you live streamed in the past three months were...



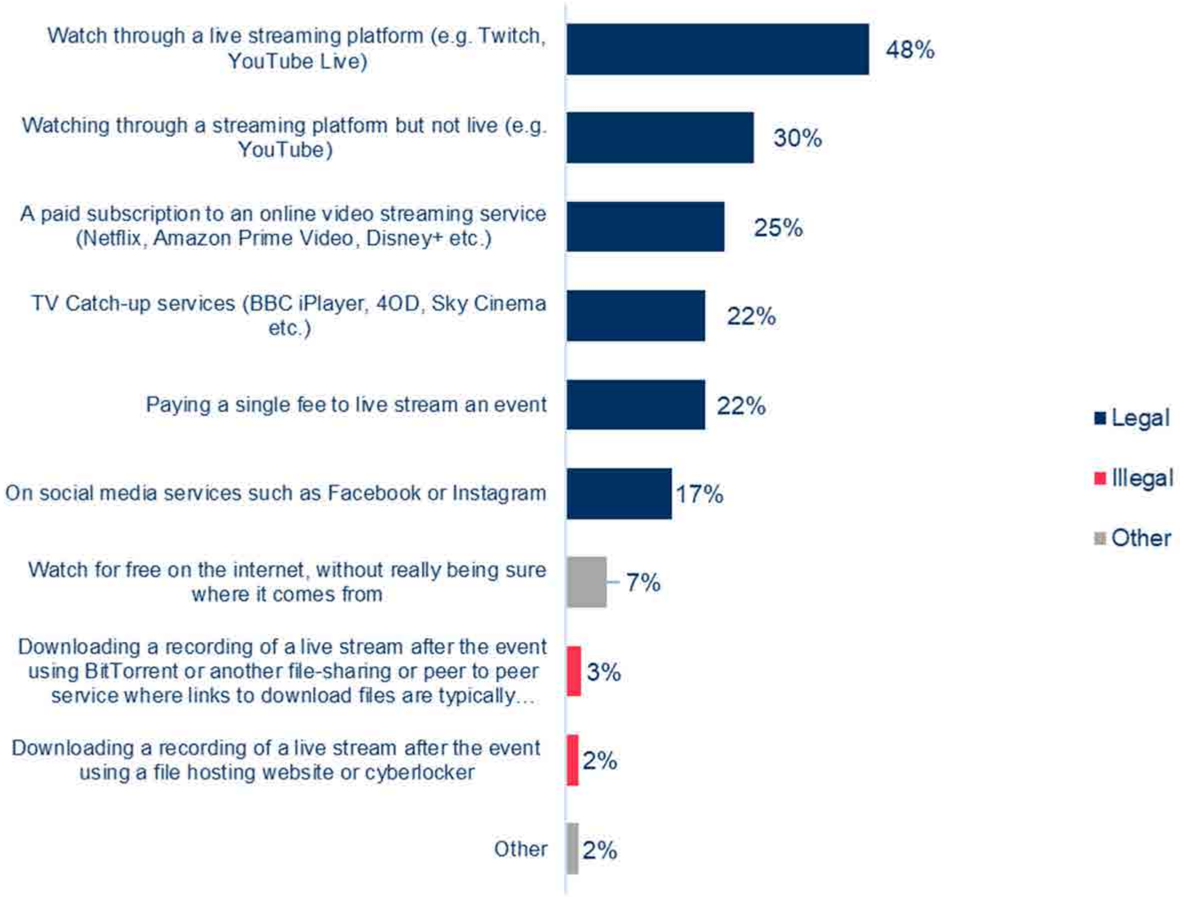
Base: Those who had watched a live stream in the past three months (n=1,228)

Sources of live streams

Respondents were shown a list that encompassed the different ways (legal and illegal) that they could watch live streams. An 'unknown' option was provided to serve as a catch-all for those who were unsure of the exact source. As this is an emerging area the 'legal' and 'illegal' figures are indicative with future waves potentially incorporating new legal and illegal sources.

- Respondents were most likely to watch live streams through a live streaming platform (48%). This was followed by those using a streaming platform for events that are not live (30%).
- A paid subscription to an online video streaming service, TV catch up services and paying a single fee to live stream an event were each used by between 22-25%. This was followed by social media services (17%).
- The two illegal methods included (i.e. "Downloading a recording of a live stream after the event using BitTorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay" and "Downloading a recording of a live stream after the event using a file

hosting website or cyberlocker") were used by between 2-3%.



Base: Those who had watched a live stream in the past three months (n=1,228)

Qualitative summary

In an exploratory section included this year which explored live streaming, consumption amongst Online Community participants was relatively widespread with many having watched at least one during lockdown. Some said they watched live streams regularly on a monthly basis, often gaming streams, whilst others said they only watched live streams occasionally for big events such as concerts, festivals or theatre performances.

The most common types of live stream consumed were music related, either concerts by individual artists or music festivals, as well as gaming streams. A few participants said they had watched live streams of theatre performances this year but generally preferred attending these in person. Dedicated live streaming platforms such as Twitch meant that those familiar with these platforms also watched a host of other varied content beyond music and gaming, such as make-up tutorials, talks and more.

Some participants mentioned they had watched a little more live streaming content this year than in previous years given the restrictions on live events and many events moving online. This was particularly the case for music events such as concerts and festivals where many would have preferred to attend in person but watching a live stream was the second best option. When it came to live streams of gaming content, however, which had always been an online phenomenon, participants said their consumption had remained relatively steady. Nonetheless, some mentioned watching more live stream content in general, having had more free time to watch longer content such as live streams.

With regards to accessing live streams via official versus unofficial methods, there was little mention of illegal access amongst Online Community participants. This was due to the fact that the poorer quality of illegal streams was a deterrent and the fact that many said the majority of streams they watched could be accessed for free with no need to look at alternate sources. However, on occasions when participants did seek out free versions of paid live streams, most mentioned finding free links on social media or YouTube.

The lack of an audience at live events in the previous year only appeared to affect the experience for those watching music related live streams such as concerts and festivals. Participants felt these events lacked the usual atmosphere and engagement they would typically have with a crowd present. However, given the alternative of missing out on music events completely, many still tuned in to these streams. Other types of stream such as gaming streams were less affected by a lack of an audience as they never had audiences present in person in the first place.

"I would tend to say my viewing of live streams has roughly remained the same except for concerts due to being in lockdown. I would not usually live stream this event however I started during lockdown for something to do and to engage with new music." - Female, 16-24

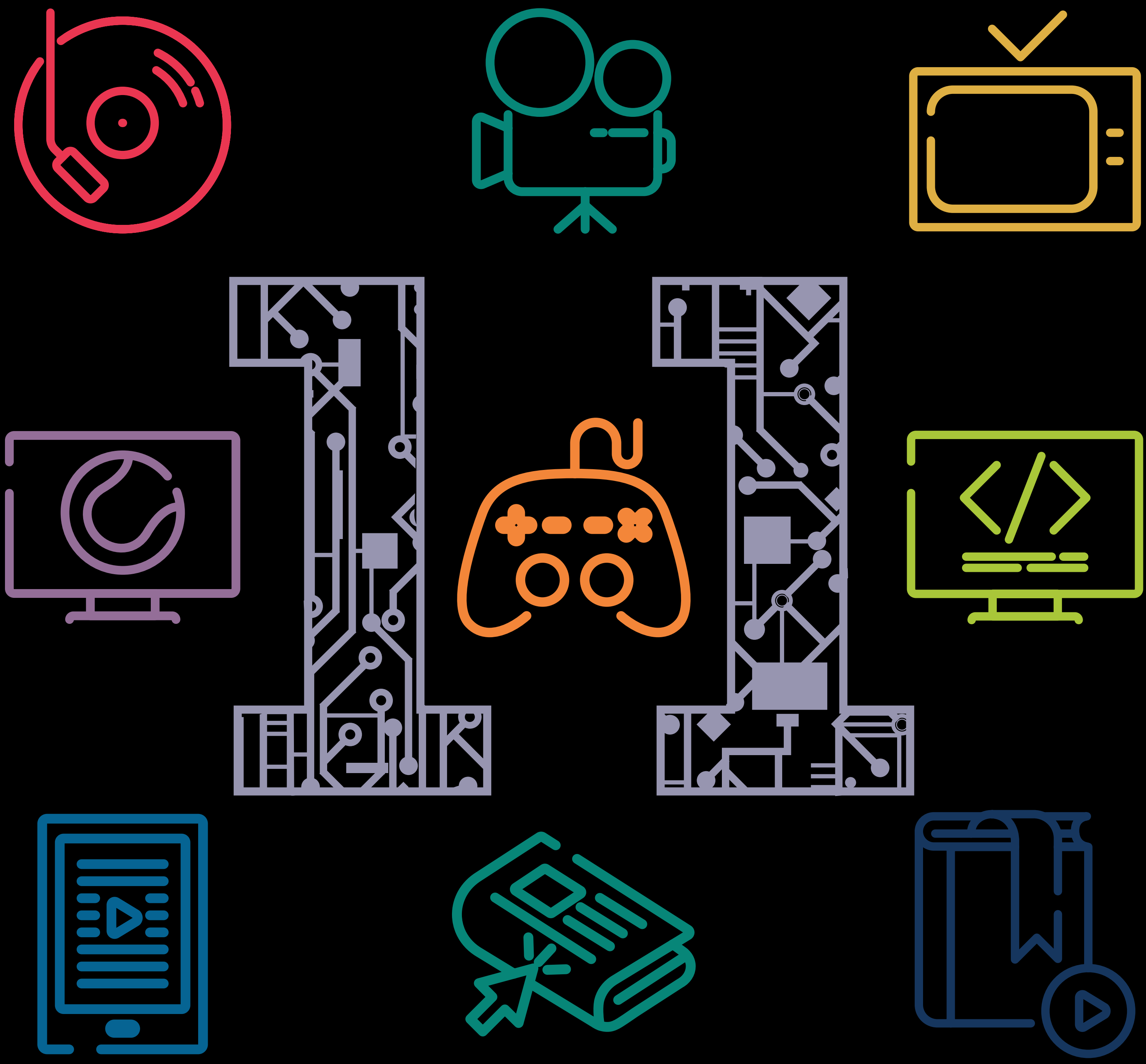
"I often watch live streaming content centred around gaming probably twice a week. This is usually walkthroughs of games such as FIFA, Call of Duty or Rocket League. I enjoy watching live streams due to my obsession with gaming. The only downside is that they can be long and this stops me from watching full streams in their entirety due to other commitments. I would say I have been engaging in streams more often during the lockdown as I have had a lot more free time on my hands. I would say it has been different watching streams without an audience present as concert streams could be considered less energetic and quite meaningless without an audience. I generally access streams for free on Twitch and YouTube." - Male, 16-24

"I don't like accessing paid live streams for free because the quality is very low and I don't really enjoy the show. When there are free streams I go for these but when there are some I need to pay for, I do and always enjoy it." - Male, 25-34

"I most enjoy watching music live streams as I am a very social person and enjoy music and concerts and not being able to attend these in person has been difficult so having the live streams has been great. Also I can watch these from the comfort of my own home wearing my pyjamas and I don't have to get dressed up for the occasion, or wait in queues." - Female, 25-34

"If I want to watch paid live streams for free I usually just do a quick Google or do a search on Reddit as free streams are usually posted on there. I usually use them when the stream isn't free which is very rare. The benefit is that they're free, the drawback is that they usually buffer quite a bit." - Female, 25-34

Category Results



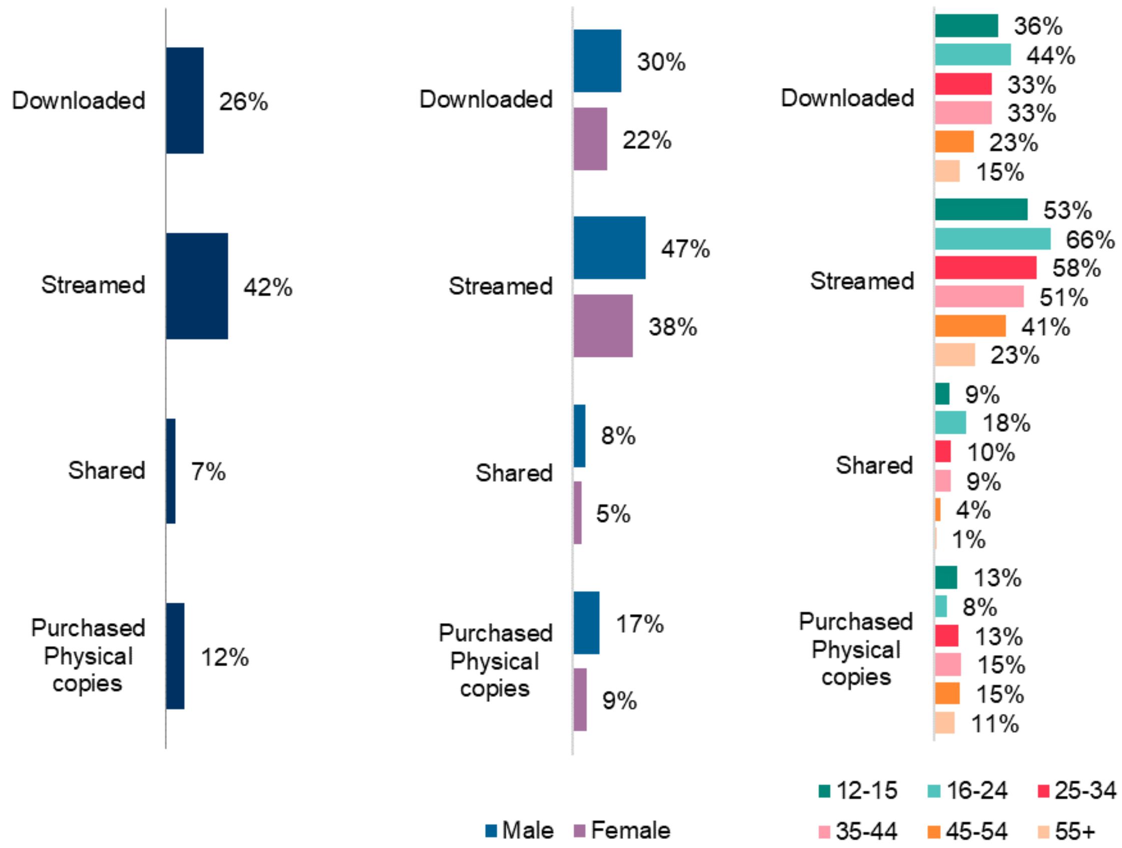
Music

Engaging with music

51% 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 42% having done so. Downloading followed at 26%, with fewer having purchased physical forms of music (12%).
- Across downloading, streaming and purchasing physical copies, **male respondents were more engaged than females.**
- Across streaming and downloading, **16-24 year olds were the most engaged** compared to both younger and older age groups.

A1. Have you downloaded/streamed/shared[1]/purchased physical copies of music in the past 3 months?



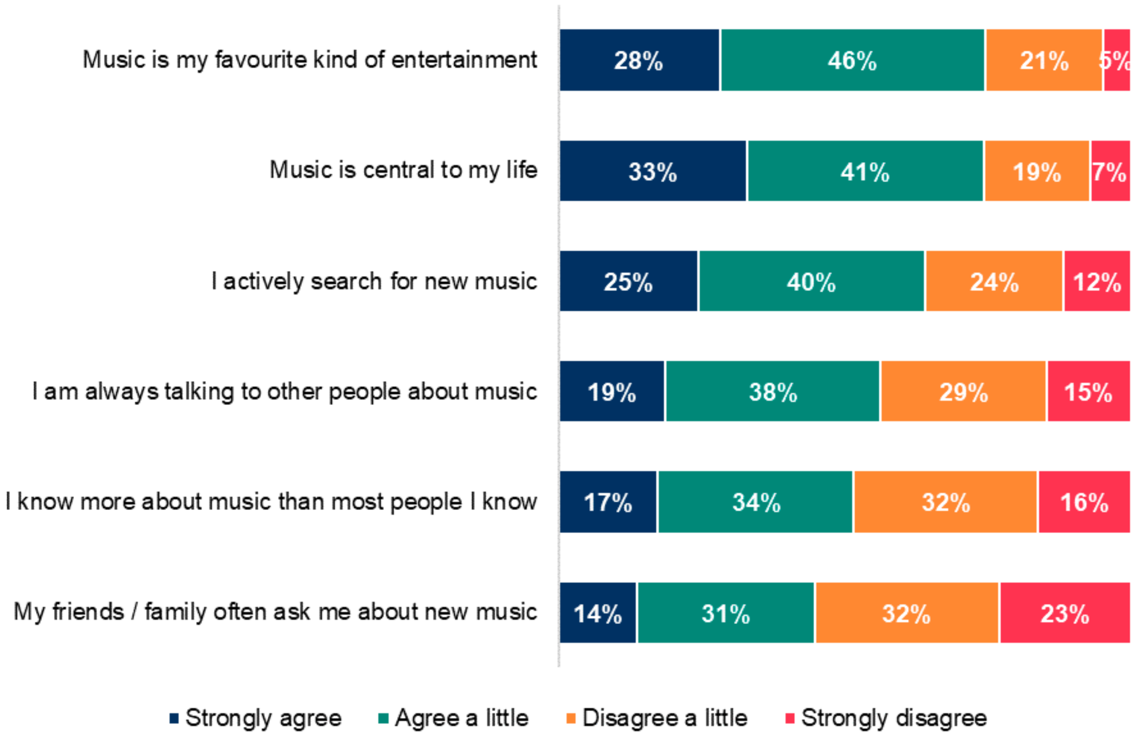
Base: n=5,000 (total sample)

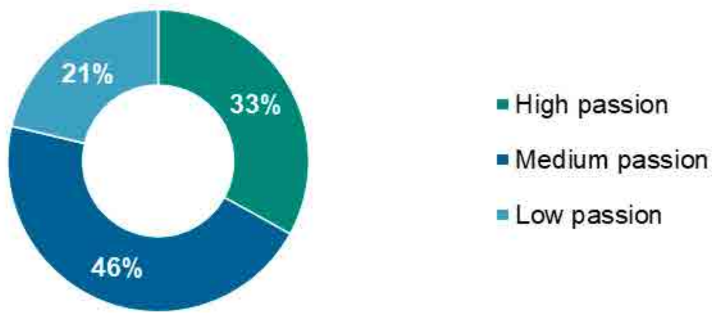
3 The definition of 'shared' was provided as: "By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated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

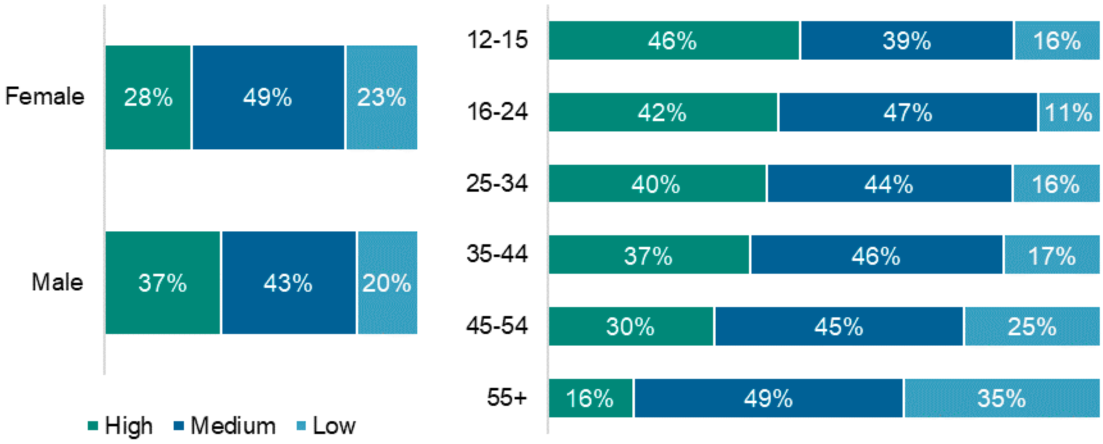
To get a broader sense of **their passion for music** respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

- Around a third (33%) displayed **high levels of passion for music.** This was most apparent in those aged 12-15 (46%) and became lower with each subsequent age group (ending at 24% in the 55+).
- More generally, responses to specific statements indicated the **importance of music.** Three-quarters said that it is their "favourite kind of entertainment" (75%) or that it is "central" to their lives (74%).

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







Base: n=2,907 (downloaded, streamed, shared and/or purchased physical copies of music in the past 3 months)

Qualitative insights

Many reported relying heavily on music this year. This was either to fill additional free time during lockdown when they were not able to plan as many things socially or in order to lift their mood and help them emotionally. Participants said music provided comfort and distraction.

Most participants were in the habit of listening to music regularly as part of everyday life pre-Covid, so although consumption didn't necessarily increase for many during the pandemic, the appreciation and need for music was heightened. However, a few did say their consumption had increased as their normal working routines had been interrupted and they now had more free time to listen.

When asked if they would continue listening to music at the same frequency in the coming months when social restrictions were likely to ease, those whose listening had remained stable said their consumption would remain unaffected. However, the few who had noted an increase in their consumption said this was likely to return to their listening levels prior to the pandemic as they would no longer have as much time to fill.

- *"Listening to music lifts my mood and can be fun to sing along to. It's also good if you want to feel as if you have company when you are alone."* - Female, 16-24

- *"I was accessing music every day at many different times of the day for example when cooking or reading by using either Google Home or Alexa devices depending on where I was. I also purchased some wireless headphones and used these to listen to podcasts or music on Spotify or the radio when in the garden or walking the dog. I started using music or sounds or meditation to go to sleep at night as well. Music was utilised heavily in my household."* - Female, 25-34

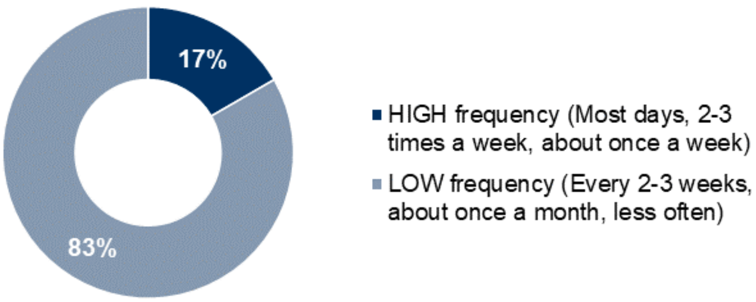
- *"Pre-Covid I believe I tended to tune into or play music that went with my mood at the time...during Covid I perhaps tended to play music that might alter or create a mood. Continued isolation brought more silence into the home so on reflection it's probably true to say that we played or tuned in more to music than pre-Covid."* - Male, 55+

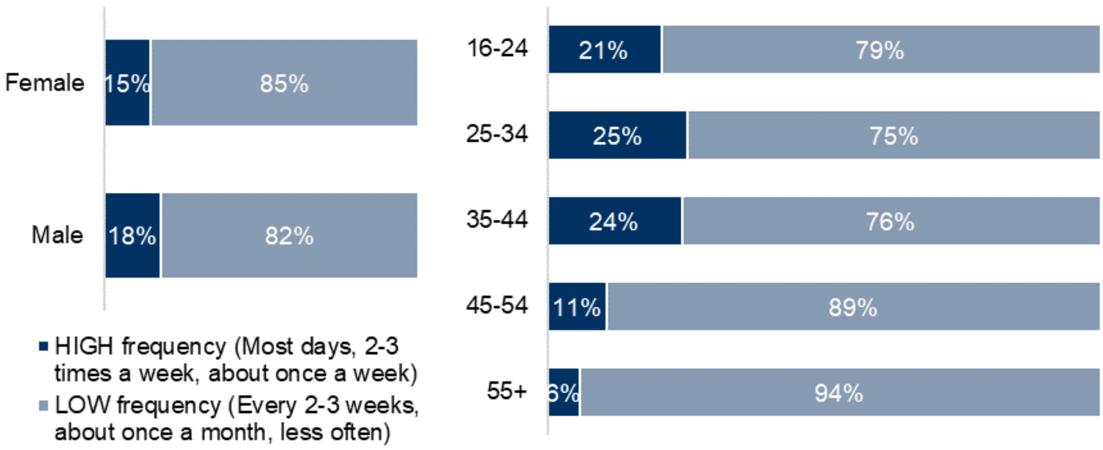
Physical purchasing of music

The 12% of respondents who had purchased music in physical formats, specifically CDs or vinyl, during the previous 3 months were asked more questions around frequency and number of purchases made.

- Almost one in five (17%) of these were **frequent purchasers** of CDs or vinyl records (i.e. least once a week).
- Interestingly, given their higher consumption of digital music, younger respondents (i.e. aged 44 or less) were also more likely to be frequent purchasers of physical music, with 24%+ doing so compared with 6-11% in older age groups. However, small sample sizes (i.e. approximately n=50 or less) for the 12-15 and 16-24 age groups means that the results here for the frequency and number of purchases should be interpreted with caution.
- The majority of physical purchases were albums (91%) rather than singles (9%).
- An average of 10 purchases were made in a three month period.

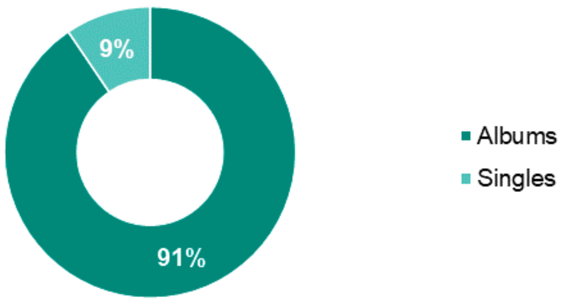
A3. Generally, how often do you purchase physical CDs or vinyl records?





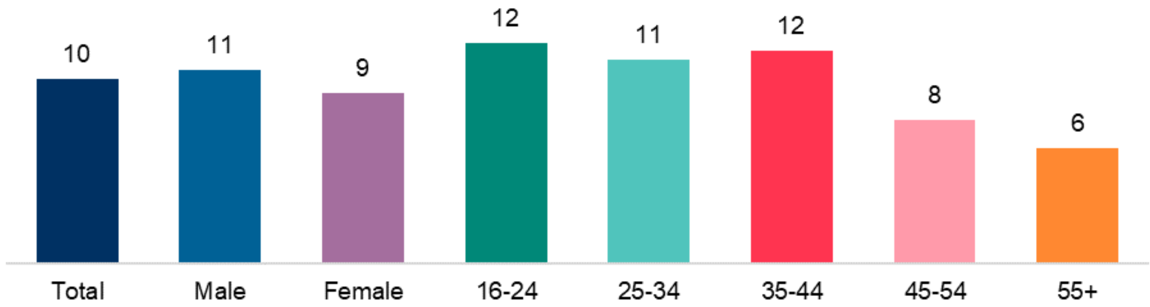
Base: n=622 (purchased physical copies of music in the past 3 months)

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



Base: n=598 (purchased physical copies of music in the past 3 months)

A5. In the past 3 months how many physical music products (CDs, Vinyl etc.) did you purchase? (Average purchases)



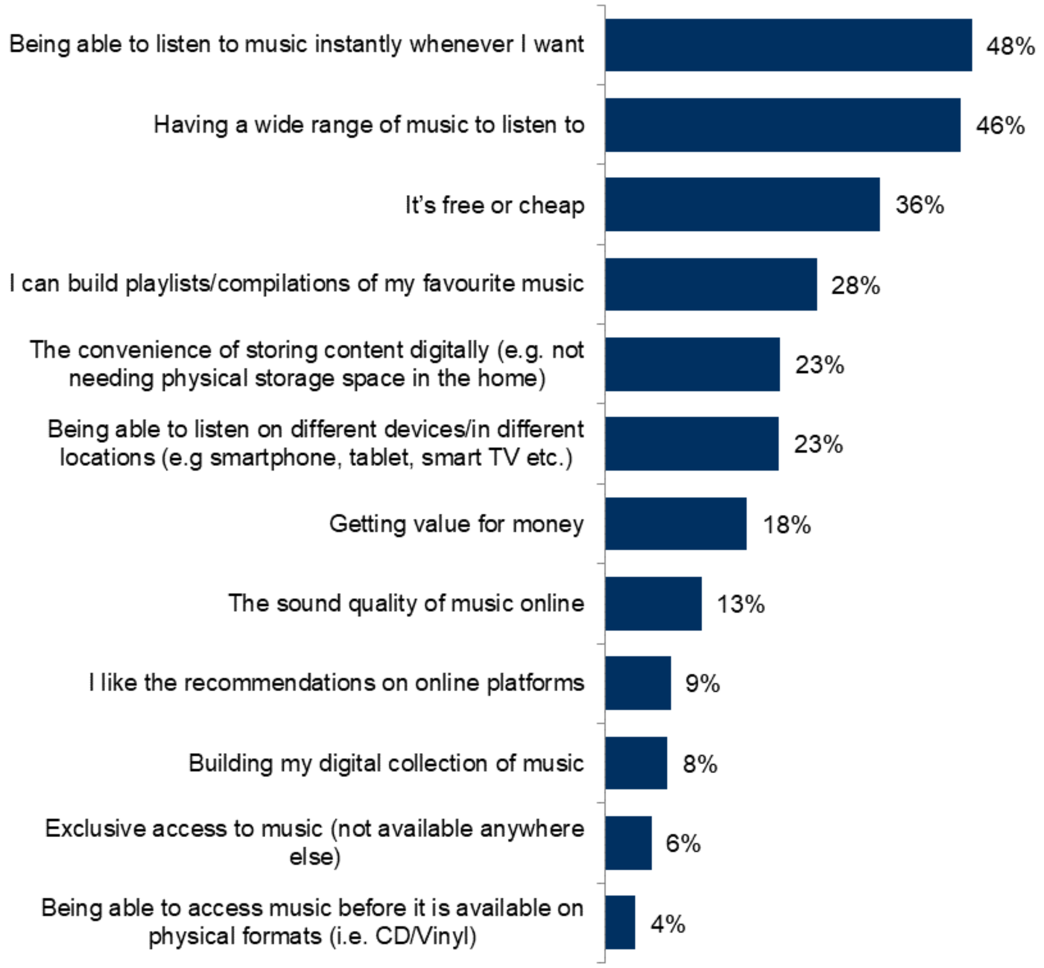
Base: n=612 (purchased physical copies of music in the past 3 months)

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.

- No single reason was selected by more than half of respondents, suggesting a fairly broad range of motivations. The two that resonated the most strongly related to **convenience** (“Being able to listen to music instantly whenever I want” 48%) and the **range** of options available (“Having a wide range of music to listen to” 46%).
- **Price** (“It's free or cheap” 36%) was the third most popular reason and somewhat ahead of the remaining options.
- The above three reasons were consistently selected across genders and all age groups.
- **Added value features,** such as sound quality and having a more tailored listening experience through playlists or recommendations were notably less valued.

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



Base: n=2,347 (downloaded or streamed music online in the past 3 months)

Male respondents	Female respondents
1. Having a wide range of music to listen to (46%) 2. Being able to listen to music instantly whenever I want (44%) 3. It's free or cheap (36%)	1. Being able to listen to music instantly whenever I want (53%) 2. Having a wide range of music to listen to (47%) 3. It's free or cheap (36%)

Aged 12-15	Aged 16-24
1. Being able to listen to music instantly whenever I want (46%) 2. Having a wide range of music to listen to (42%) 3. I can build playlists/compilations of my favourite music (30%)	1. Being able to listen to music instantly whenever I want (50%) 2. Having a wide range of music to listen to (43%) 3. I can build playlists/compilations of my favourite music (38%)
Aged 25-34	**Aged 35-44**
1. Being able to listen to music instantly whenever I want (49%) 2. Having a wide range of music to listen to (44%) 3. It's free or cheap (32%)	1. Having a wide range of music to listen to (46%) 2. Being able to listen to music instantly whenever I want (44%) 3. It's free or cheap (33%)
Aged 45-54	**Aged 55+**
1. Having a wide range of music to listen to (52%) 2. Being able to listen to music instantly whenever I want (49%) 3. It's free or cheap (41%)	1. Having a wide range of music to listen to (50%) 2. Being able to listen to music instantly whenever I want (48%) 3. It's free or cheap (45%)

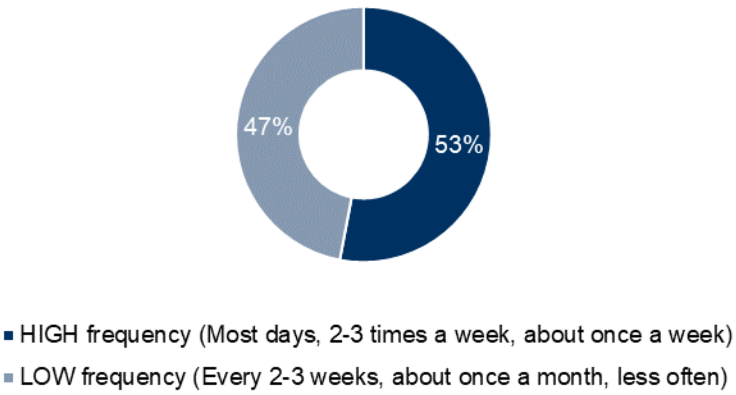
Downloading music

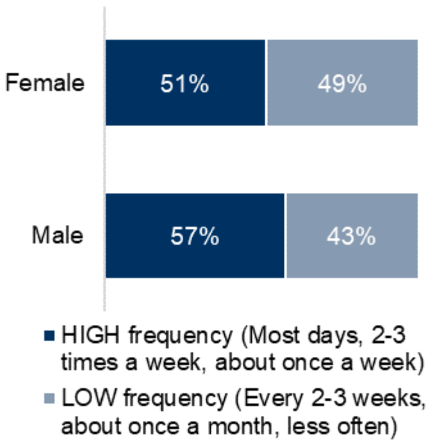
The 26% who had downloaded music during the previous 3 months were asked more questions around frequency, volume and sources used.

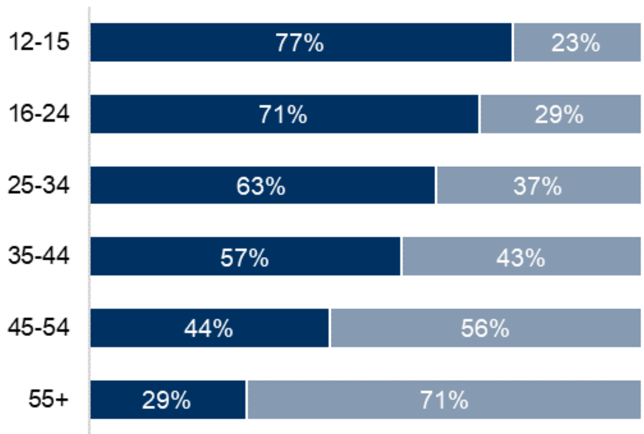
Frequency and volume of downloading music

- Over half (53%) of those who download music do so frequently (i.e. at least once a week). **Weekly downloading was most common among the youngest age group** (12-15) with over three quarters (77%) doing so. It was less common among each subsequent age group, with only 29% of those aged 55+ doing so on a weekly basis.
- An average of 97 music tracks had been downloaded over the past three months. This was highest among the two youngest age groups with those aged 16-24 and 12-15 downloading 137 and 124 tracks respectively. Those aged between 25-54 downloaded between 92-106 tracks which fell to 45 for the 55+.

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

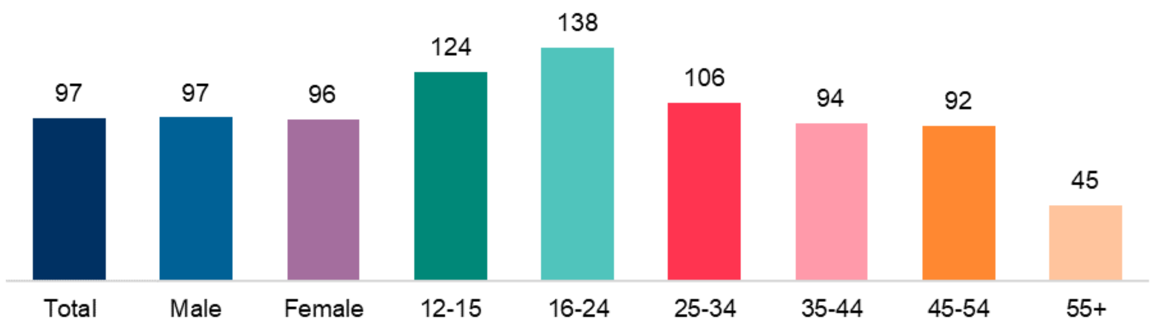






Base: n=1,269 (downloaded music in the past 3 months)

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



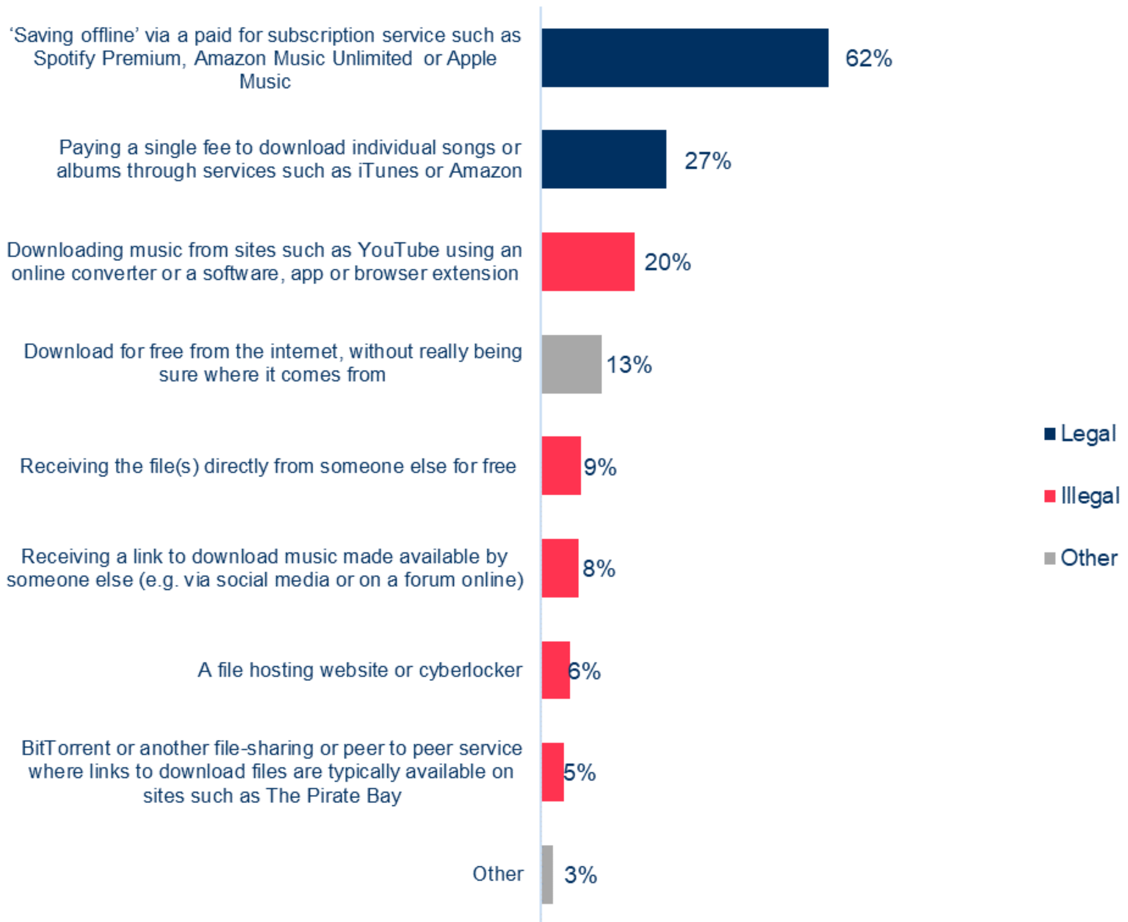
Base: n=1,254 (downloaded music in the past 3 months)

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 used source for downloading music, by a considerable margin, was a legal one.** “Saving offline” via a paid for subscription service was used by 62% and was followed, at 27%, by another legal source in those who paid “a single fee to download individual songs or albums”.
- **The most commonly used illegal source was downloading music from sites such as YouTube using an online converter or a software, app or browser extension,** which was used by 20%. All other illegal sources were used considerably less with each ranging between 5-9% of music downloaders.
- Those aged between 12-34 were more likely to save offline via a paid subscription service (70-81%) compared to older age groups (45-59%).
- The most popular illegal source (i.e. downloading music from sites such as YouTube) was used marginally more by younger age groups (25% of those aged 16-25 and 22% for those aged 12-15) but remained consistently high (18-19%) for all other age groups.

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 service such as Spotify Premium, Amazon Music Unlimited or Apple Music	62%	73%	74%	83%	74%	63%	56%	50%
Paying a single fee to download individual songs or albums through services such as iTunes or Amazon	32%	26%	30%	19%	25%	39%	34%	30%
A file hosting website or cyberlocker	9%	4%	8%	9%	12%	6%	3%	1%
BitTorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay	7%	4%	7%	4%	6%	6%	6%	4%
Downloading music from sites such as YouTube using an online converter or a software, app or browser extension	24%	19%	23%	26%	20%	21%	22%	20%
Receiving the file(s) directly from someone else for free	10%	9%	14%	10%	10%	8%	8%	7%
Receiving a link to download music made available by someone else (e.g. via social media or on a forum online)	9%	9%	11%	7%	8%	11%	9%	9%
Download for free from the internet, without really being sure where it comes from	11%	7%	14%	9%	10%	8%	8%	9%

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

Base: n=1,269 (downloaded music during the past 3 months)

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

Those unsure of the source of their downloads were asked to explain more in their own words about how they obtained them.

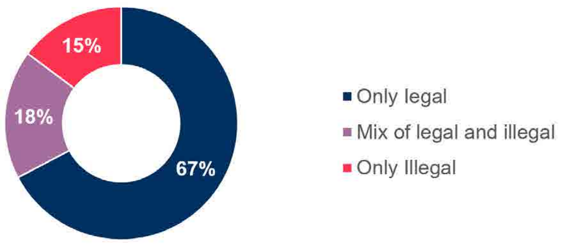
The most common method was making a search on Google or another search engine, then following the results to websites where it was possible to download the track. Another common method was following links found on social media. Like search engines, those following links on social media did not have a "go to" website for downloading music, and instead explored for the specific songs/albums they wanted to download.

Legality of music downloads

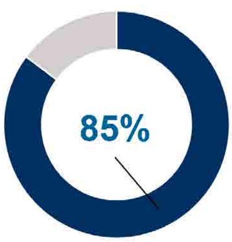
To better understand the distribution of sources across legal and illegal categories, those who had downloaded music in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

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

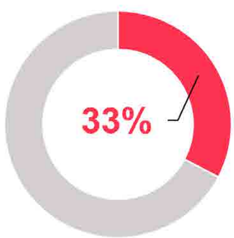
- Legal Sources:
  - Overall, 85% had used at least one legal source to download music.
  - The highest proportion (67%), by some way, had used only legal sources.
  - There were minimal differences between age groups with between 64-69% using only legal sources across all.
  - Legal sources accounted for 72% of all downloads.
- Illegal Sources:
  - 33% had used at least one illegal source to download music.
  - 15% had used illegal sources only to download music.
  - 37% of male respondents had used an illegal source to download music, compared to 26% of female ones.
  - Those aged 12-15 were most likely to have used an illegal source (37%) but those aged 55+ were most likely to say that they only use illegal sources (25%).
  - 39% of those with a high passion for music had used an illegal source to make a download which was more than those with a medium (26%) or low level (32%).
  - Illegal sources accounted for 19% of all music downloads.
- Mixed:
  - 18% had used a mix of legal and illegal sources to make a download.
  - This was highest among those aged 12-15 (26%), 16-24 (22%) and 25-34 (22%).

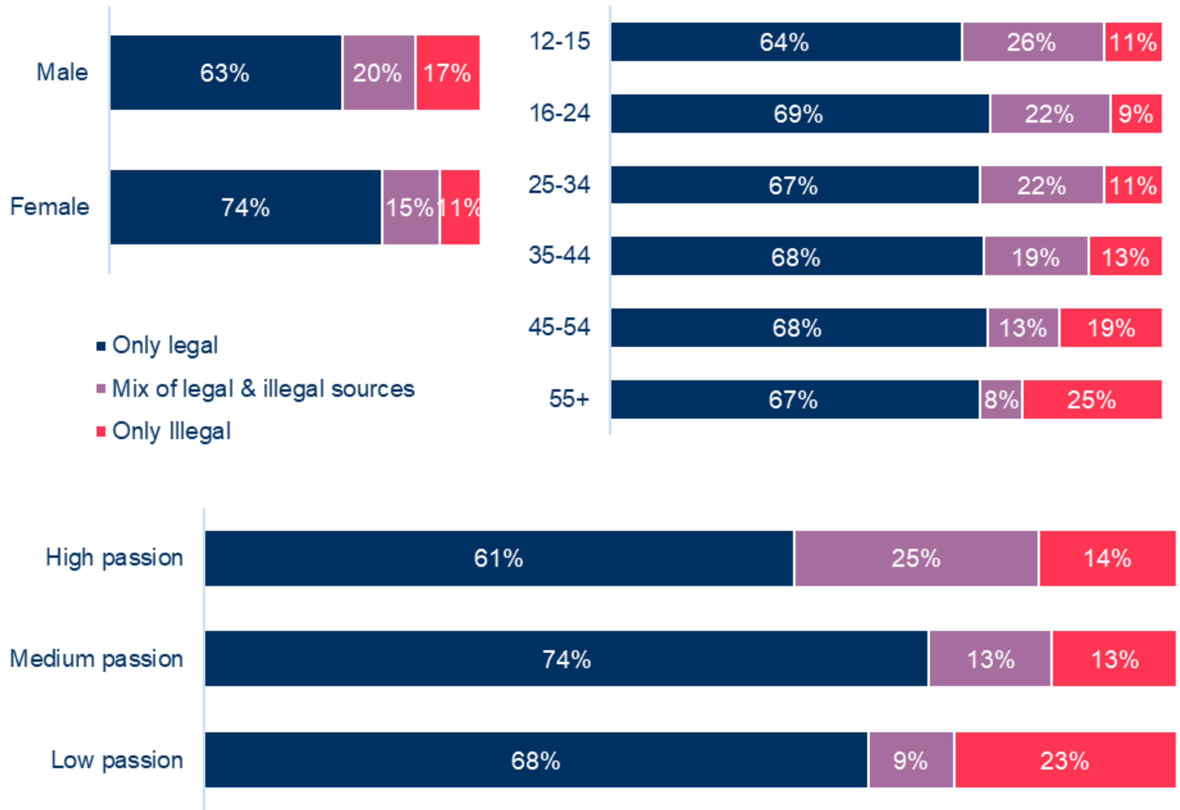


Any legal



Any illegal





Base: n=1,185 (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 and average number of downloads)

Legality	Source	Average % of usage split
Legal	‘‘Saving offline’ via a paid for subscription service such as Spotify Premium, Amazon Music Unlimited or Apple Music	54%
	Paying a single fee to download individual songs or albums through services such as iTunes or Amazon	18%
Illegal	A file hosting website or cyberlocker	2%
	BitTorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay	2%
	Downloading music from sites such as YouTube using an online converter or a software, app or browser extension	10%
	Receiving the file(s) directly from someone else for free	2%
	Receiving a link to download music made available by someone else	2%
Other	Download for free from the internet, without really being sure where it comes from	7%
	Other	2%

Base: n=1,269 (downloaded music in the past 3 months)

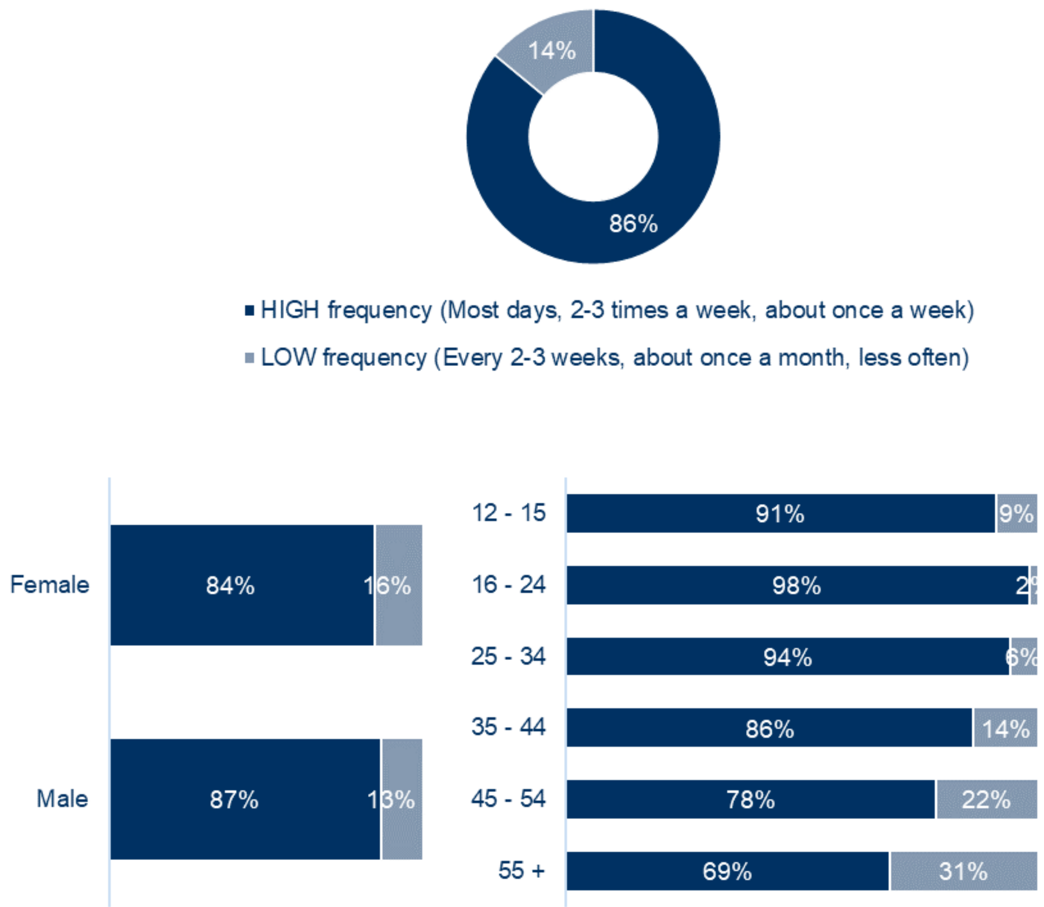
Streaming music

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

Frequency and volume of streaming music

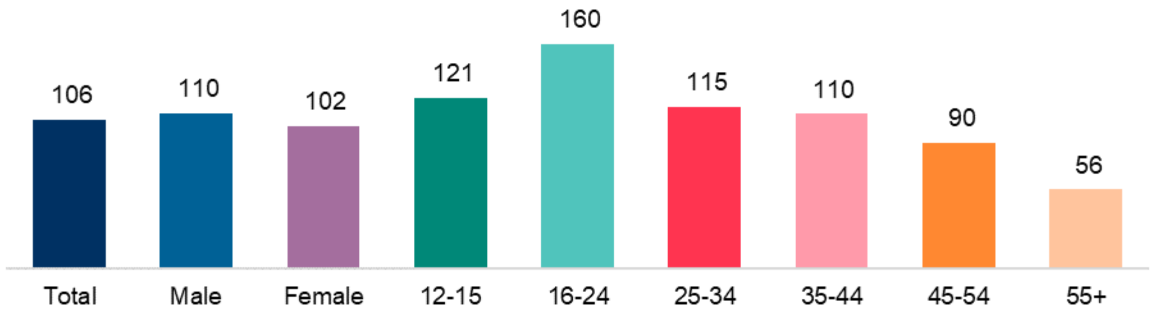
- **The majority (86%) of those who streamed music did so frequently** (i.e. at least once a week). This was notably higher than the number who had downloaded music within the same time period (53%).
- **Streaming frequently (i.e. at least once a week) was almost universal in those aged 16-24** with 98% doing so - and was higher than 90% across all age groups from 12-34. It was just below this (86%) in those aged 35-44 and it subsequentially fell to 78% and 69% for the 45-44 and 55+ age groups respectively.
- **An average of 106 hours were spent streaming in a three-month period.** This was highest in those aged 16-24 where it rose to 160 hours. For all other age groups, it was between 90-121 hours apart from the 55+ where it fell to 56.

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



Base: n=2,071 (streamed music in the past 3 months)

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



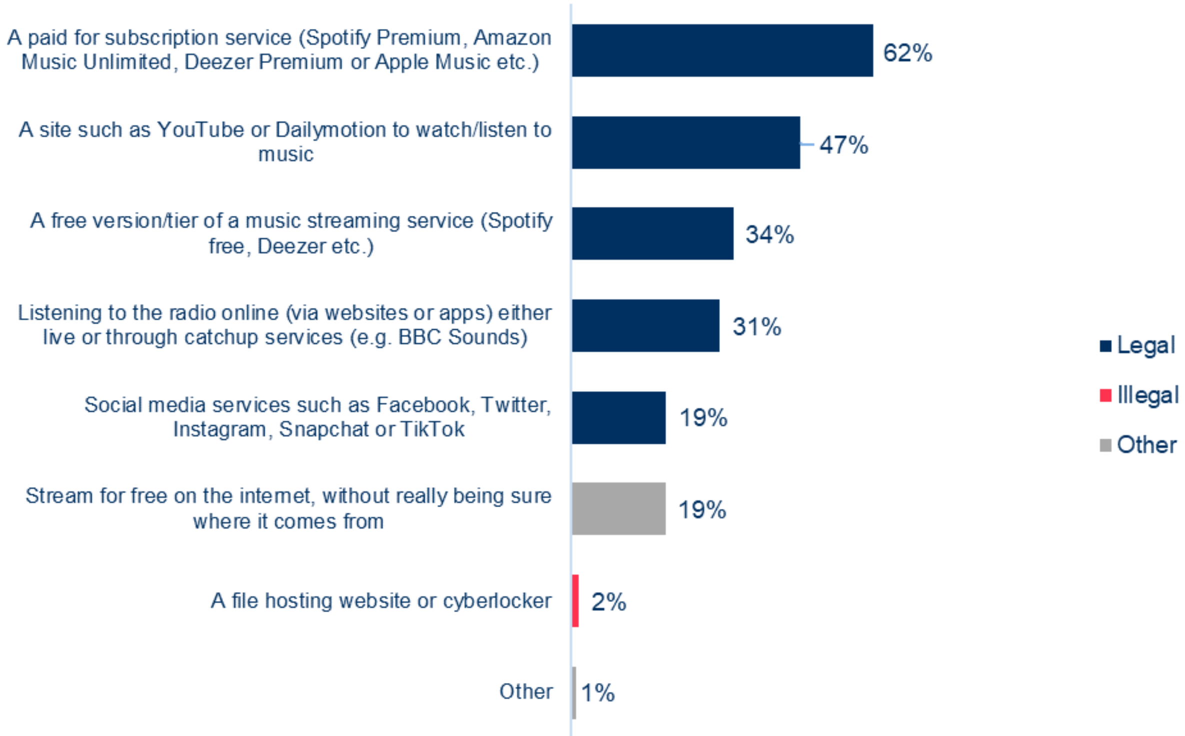
Base: n=2,036 (streamed music in the past 3 months)

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 for us to ask about in the survey and, encouragingly, only a small minority had used these.
- The most selected source was a paid one with 62% using "a paid for subscription service" (e.g. Spotify Premium). This was followed by a free source with 47% watching/listening on sites such as YouTube or Dailymotion.
- Those aged 16-24 were most likely to have a paid subscription service (82%). A high proportion (55-71%) of respondents in all other age groups also accessed music this way, apart from those aged 55+ where it was 39%.
- The only illegal method tested, a "file hosting website or cyberlocker", was used by just 2%.

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 Music Unlimited, Deezer Premium or Apple Music etc.)	61%	63%	67%	82%	71%	64%	55%	39%
A free version/tier of a music streaming service (Spotify free, Deezer etc.)	34%	33%	37%	28%	32%	35%	36%	36%
Social media services such as Facebook, Twitter, Instagram, Snapchat or TikTok	19%	20%	29%	23%	20%	18%	15%	17%
A file hosting website or cyberlocker	2%	1%	1%	2%	3%	2%	0%	0%
A site such as YouTube or Dailymotion to watch/ listen to music	48%	47%	39%	53%	51%	49%	41%	47%
Listening to the radio online (via websites or apps) either live or through catchup services (e.g. BBC Sounds)	29%	33%	24%	18%	28%	33%	41%	37%
Stream for free on the internet, without really being sure where it comes from	8%	5%	10%	5%	4%	4%	9%	9%
Other	1%	1%	0%	0%	0%	1%	3%	2%

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

Base: n=2,071 (streamed music in the past 3 months from the listed sources, unsure removed)

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

Those unsure of the source of their streaming were asked to explain more in their own words about how they obtained them.

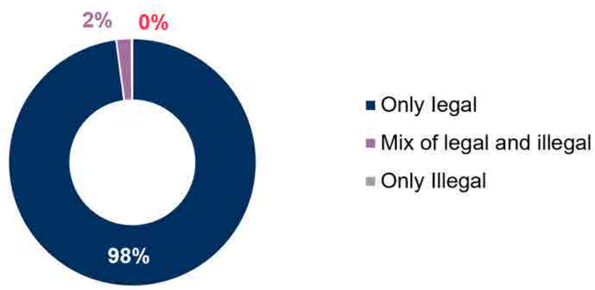
Similar to downloading music, most searched on Google or another search engine, and scrolled through the responses to find a link to stream their desired song. Most did not mention a specific website that they streamed music from as it changed depending on each specific song or album they searched for.

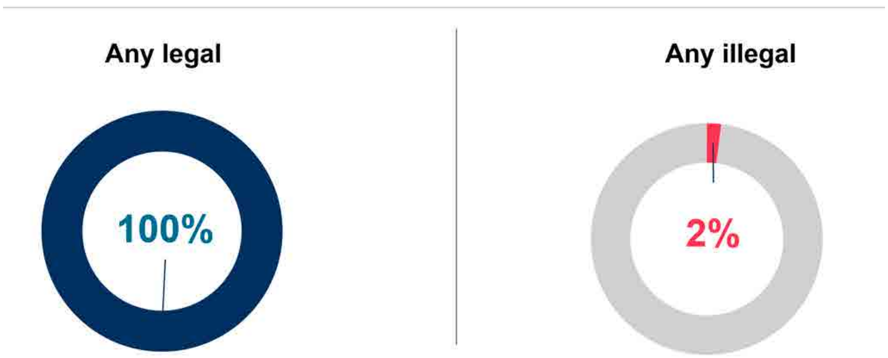
Legality of music streaming

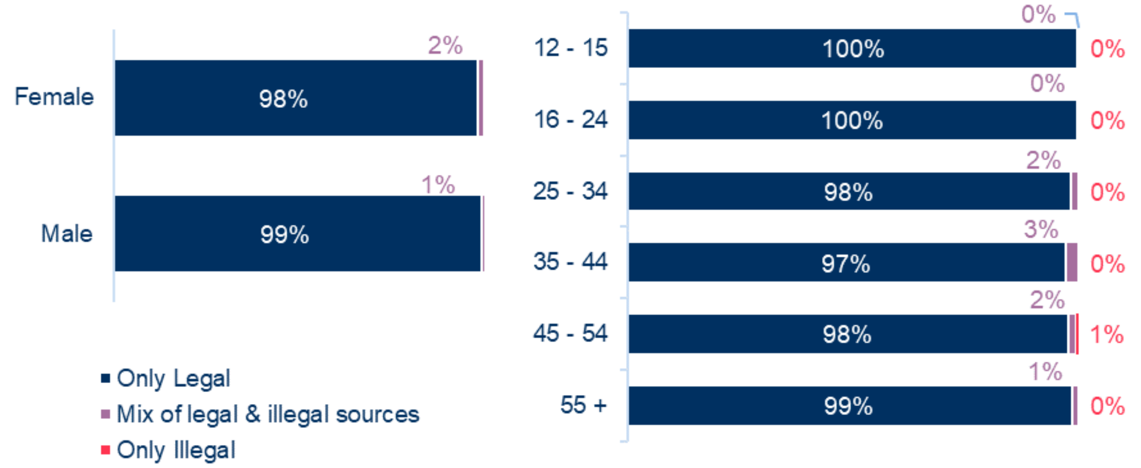
To better understand the distribution of sources across legal and illegal categories, those who had streamed music in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only; illegal sources only; or a mix of the two.

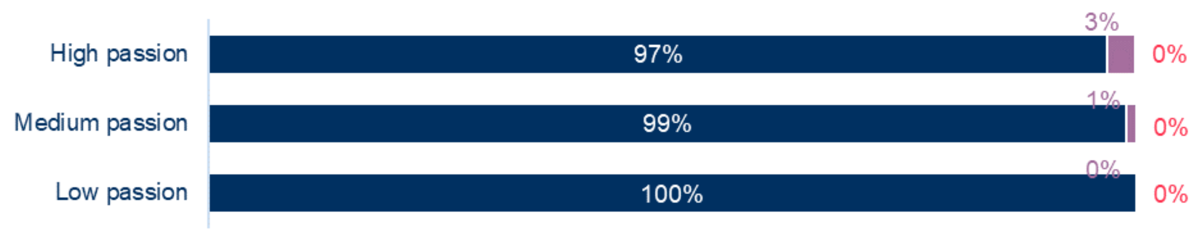
The answer option "stream for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they only consumed content this way was not included in the base.

- Legal:
  - In contrast to downloading, music was being streamed **almost entirely legally** with almost all respondents (98%) doing so.
- Illegal:
  - 0% had used only illegal sources to stream music.
- Mixed:
  - 2% had used a mix of legal and illegal sources









Base: n=2,041 (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?

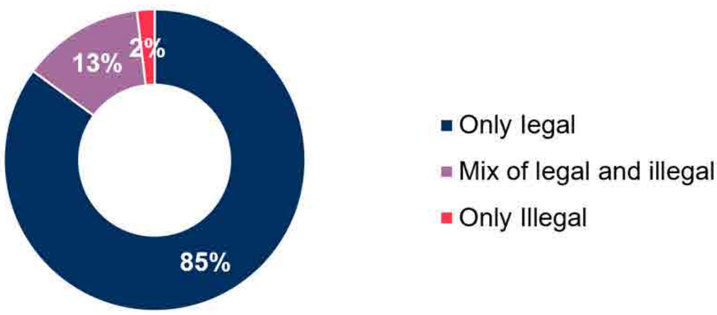
Legality	Source	Average % of usage split
Legal	A paid for subscription service (Spotify Premium, Amazon Music Unlimited, Deezer Premium or Apple Music etc.)	48%
	A site such as YouTube or Dailymotion to watch/ listen to music	18%
	A free version/tier of a music streaming service (Spotify free, Deezer etc.)	16%
	Listening to the radio online (via websites or apps) either live or through catchup services (e.g. BBC Sounds)	11%
	Social media services such as Facebook, Twitter, Instagram, Snapchat or TikTok	4%
Illegal	A file hosting website or cyberlocker	0%
Other	Stream for free on the internet, without really being sure where it comes from.	2%
	Other	0%

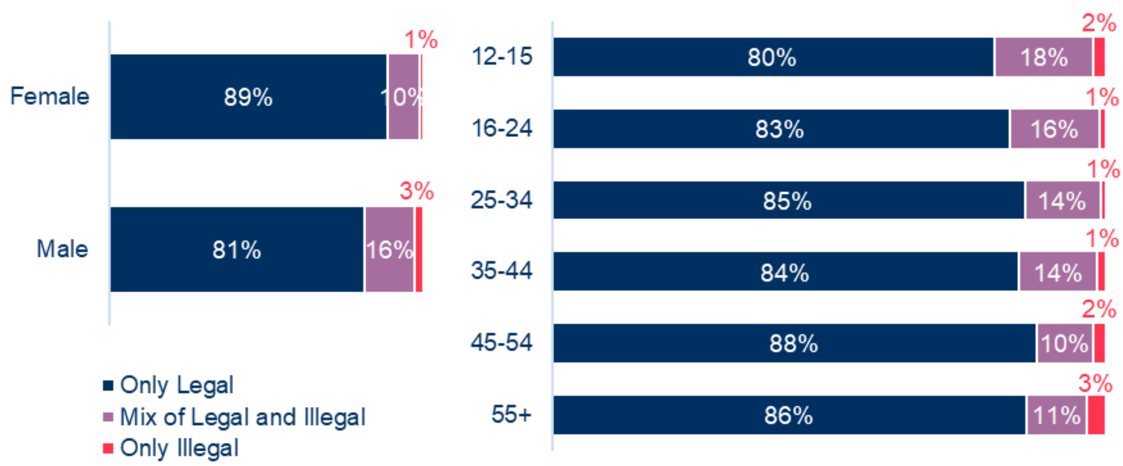
Base: n=2,071 (streamed music in the past 3 months)

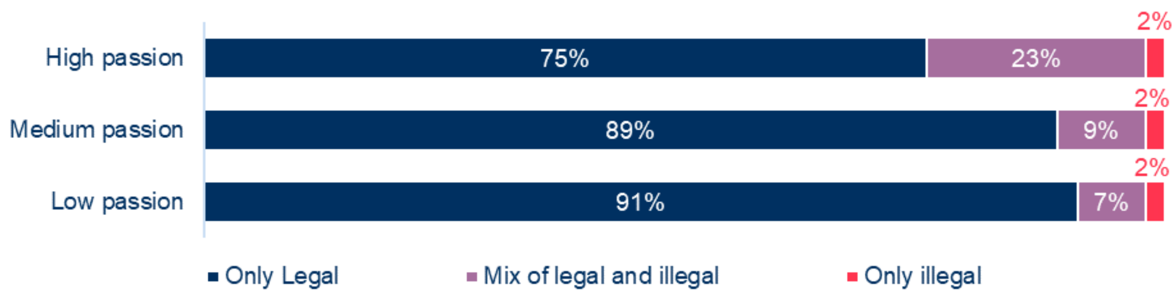
Combined downloading and streaming of music

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:
  - **85%** had consumed music online using legal sources only.
- Illegal:
  - **2%** had used illegal sources only to consume music online.
- Mixed:
  - **13%** had used a mix of legal and illegal sources to consume music online.
  - Those with a high passion level for music were more likely to use a mix (23%) of sources, compared to those with either a medium (9%) or low passion level (7%).







Base: n=2,656 (streamed and/or downloaded music from a legal or illegal source, with those who only selected 'not sure of source' removed)

Qualitative insight

Overall, most participants in the Online Community were users of paid music streaming services and used these almost exclusively for consumption. However, those who downloaded music and infringed often used a variety of methods.

Downloaders looking for free music often used a range of sources including YouTube converters, BitTorrent sites or other online file converters and sharing music files between friends. Participants reported reaching for these methods because they are free, it is possible to access a greater variety of music and/or they want to store downloads of songs on their hardware. A couple also enjoyed sharing songs and playlists between friends without both parties needing to be signed up to a streaming service.

Those who had increased their consumption of music via illegal sources during the past year did so due to the circumstances surrounding the Covid-19 pandemic and the related social restrictions. Some of the impacts of these circumstances included a reduced income for some, meaning a greater need for free content, and greater amounts of free time to listen to more music.

- *"My main go to for free downloadable music has got to be YouTube. I use YouTube for its ease of navigation and large variety of music and content. I have used YouTube for a number of years. Another means of getting free music is file sharing between friends (this is either via email or Bluetooth usually). I usually use this method when pinching an entire playlist a friend has."* - Female, 35-44

- *"I use a file sharing site occasionally. Initially it was to try and get mp3 versions of all my old cassettes and vinyl, but now it's to access newer music. Then if I like it I will buy the CD. Been using it for about 10 years. Also have used Dropbox as a way of sharing music with friends. As above it's with a view to buying the CD or going to see the band if possible. It's also a way of getting access to rarer tracks. Been doing that for about 3 or 4 years. The last year hasn't really seen a change in the way I approach this. It's been a long-standing way of accessing music."* - Male, 45-54

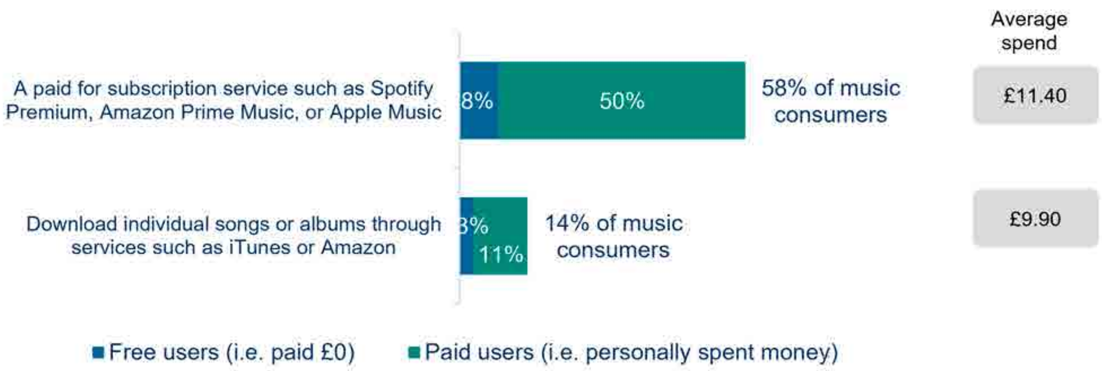
Paying for music

Those who had used a paid source to either download or stream music were asked how much they had personally spent on each source in a month.

- Over half of music consumers (58%) had used a paid subscription service (e.g. Spotify Premium) with most of those (50% of all music consumers) making a personal contribution towards this. They spent an average of £11.40 each month towards this, which is around the cost of one streaming service.

- Compared to streaming, smaller numbers of respondents (14%) had downloaded individual songs through paid services such as iTunes. Most of those (11% of music consumers) made a personal contribution and spent, on average, marginally less than was spent on streaming (£9.90).

A15. Approximately how much do you personally spend each month on the below sources of streaming or downloading music? (Proportion of music consumers over past three months using a paid source and average amount spent each month by users of that source)



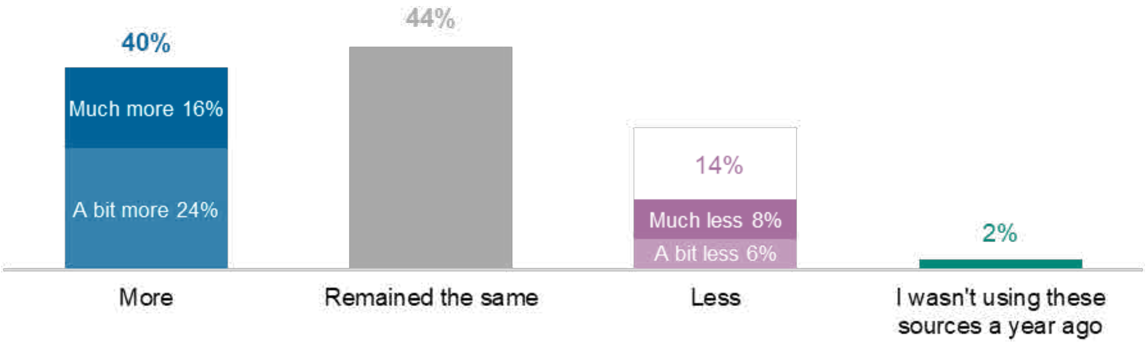
Base: n=171-1,563 (streamed and/or downloaded music)

Change in use of illegal sources

Those who had used an illegal source to download or stream music were asked how the use of these sources compares to the same point a year ago.

- Respondents were fairly evenly split between those whose usage had remained the same (44%) and those whose had increased (40%). A relatively small number said their usage had decreased (14%) or that they weren't using these sources a year ago (2%).

A16. You said you download or stream music using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=391(downloaded and/or streamed music illegally)

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

Those who had used illegal sources **more** in the last year frequently cited COVID-19 as impacting their increased usage, specifically the need to fill additional spare time spent at home during the lockdowns. The absence of cost of illegal sources was also a commonly cited reason and was, for many, related to reduced disposable income stemming from the pandemic.

- *"Due to the Pandemic and not being physically able to attend stores to purchase the songs. Also, the need to be entertained more with less disposable income due to Covid."* - Male, 45-54
- *"Since I have spent more time at home because of the pandemic, I've had a bit more spare time. Music helps me to relax and has played an increased role in my life during the last 12 months!!"* - Male, 35-44
- *"Because they are cheap, low fee, super efficient, not expensive to purchase and have unlimited use of music."* - Female, 12-15

Among those who used illegal sources **less frequently** in the last year, many cited increased usage of streaming services - both free and paid tiers - as the main reason for their decreased usage. COVID-19 also had an impact on the use of illegal sources as many did not feel the need to illegally download as they had constant access to the internet due to being at home during lockdown. There was also the shared sentiment among many of these respondents that many legal sources, including free ones, had become easier to use than the illegal sources that they had previously used to listen to music.

- *"Because I use more free trials of streaming services"* - Female, 16-24
- *"As we spend more time at home, we are always connected to internet, so I prefer YouTube or Spotify"* - Female, 25-34
- *"I'm often at home so I just listen through Spotify rather than converting for my phone/mp3 player."* - Male, 16-24
- *"There are easier ways now to listen to music"* - Female, 16-24

Of the few respondents that had begun to use illegal sources in the last year, many had done so because they had only been introduced to those in the last year. A few recent adopters of illegal sources cited spending more time looking for new music as a result of COVID-19 as a reason for starting to use illegal sources.

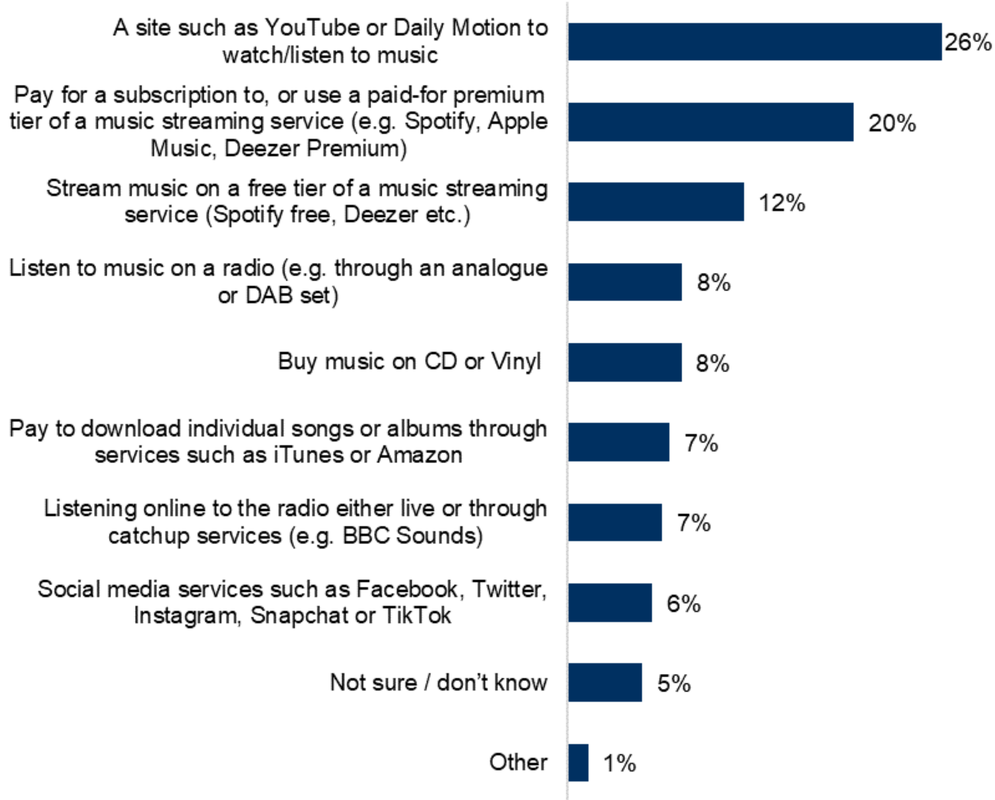
- *“Convenience and recommended by one of my children”* - Male 55+
- *“To be able to download artists performing tracks in lockdown”* - Female, 35-44
- *“Someone suggested them.”* - Male, 55+

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.

- The most selected source was a free one with just over a quarter saying they would use a site such as YouTube or Dailymotion to watch/listen to music (26%).This was followed by 20% who would use a paid subscription to a music streaming service.
- A free tier of a music streaming service would be used by 12% with all other answer options selected by between 6-8%.
- Respondents aged 45+ were more likely to consider physical mediums such as CDs or vinyl (15-18%) than they were a paid subscription to a streaming service (10%). This contrasts with younger respondents (i.e. 12-44) who, in terms of paid sources, would be most likely to consider a paid subscription to a streaming service. This was highest for those aged 16-24 (36%).

A17. 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, Deezer Premium)	18%	24%	15%	36%	28%	16%	10%	10%
Stream music on a free tier of a music streaming service (Spotify free, Deezer etc.)	11%	15%	19%	8%	12%	12%	16%	10%
A site such as YouTube or Daily Motion to watch/listen to music	26%	26%	13%	35%	26%	29%	24%	25%
Pay to download individual songs or albums through services such as iTunes or Amazon	8%	5%	7%	3%	8%	9%	4%	10%
Listen to music on a radio (e.g. through an analogue or DAB set)	7%	10%	11%	3%	5%	9%	10%	12%
Listening online to the radio either live or through catchup services (e.g. BBC Sounds)	7%	5%	11%	0%	6%	4%	8%	12%
Social media services such as Facebook, Twitter, Instagram, Snapchat or TikTok	6%	5%	13%	1%	11%	6%	3%	1%
Buy music on CD or Vinyl	10%	3%	5%	7%	0%	5%	18%	15%
Other	1%	2%	0%	4%	0%	2%	2%	0%
Not sure / don't know	6%	4%	6%	3%	4%	8%	6%	5%

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

Base: n=391 (downloaded and/or streamed music illegally)

Qualitative insights

When asked about the prospect of losing access to unofficial sources of music, most participants felt this was not too big a deal and that there were still ways of accessing the majority of the music they wanted via legal methods without much additional cost.

Whether participants projected consuming more or less content if unofficial sources were removed depended largely on their need for downloaded music on their devices, e.g. to listen in the car etc. Those who relied more on downloads projected a potential small decrease in their consumption as they said they would likely have to spend a little more time and money on official downloads or physical copies of music to replace unofficial downloads.

Other participants who were less wedded to downloads on their hardware and/or didn't infringe often to start with, said that their consumption and ease of access would not be as affected; they would simply stick to the legal methods they already use such as official streaming services.

Those participants who did not currently pay for music streaming services said they would be unlikely to take these up in the future even if they lost access to their current free sources; either due to the prohibitive cost of subscriptions after a year of financial hardship or not being able to download songs directly onto their hardware.

- *“If I could no longer access music for free online, I don't think I would be that bothered as I only use it on the odd occasions so it would not be a big loss to me.”* - Female, 35-44
- *“I would feel a little annoyed but I would get over it. I use Spotify Premium so would still have access but I mostly use unofficial sources to download songs to burn to a disk to use in my car which has no access to Spotify. The impact would be that I would no longer be able to listen to what I want in the car and just listen to the radio as I would not pay for individual music downloads due to these being too expensive. Overall, I would consume less content as I would be restricted to just radio in the car.”* - Female, 16-24
- *“I would be ok with that. I'd probably end up buying more mp3 downloads from sites like Bandcamp or direct from artist’s websites. It wouldn't really affect me too much. I would probably use Facebook or YouTube to see if I could find footage of them to decide whether to take the plunge and buy their music. My music collection would still grow, maybe not as fast as usual but I would still seek output.”* - Male, 45-54

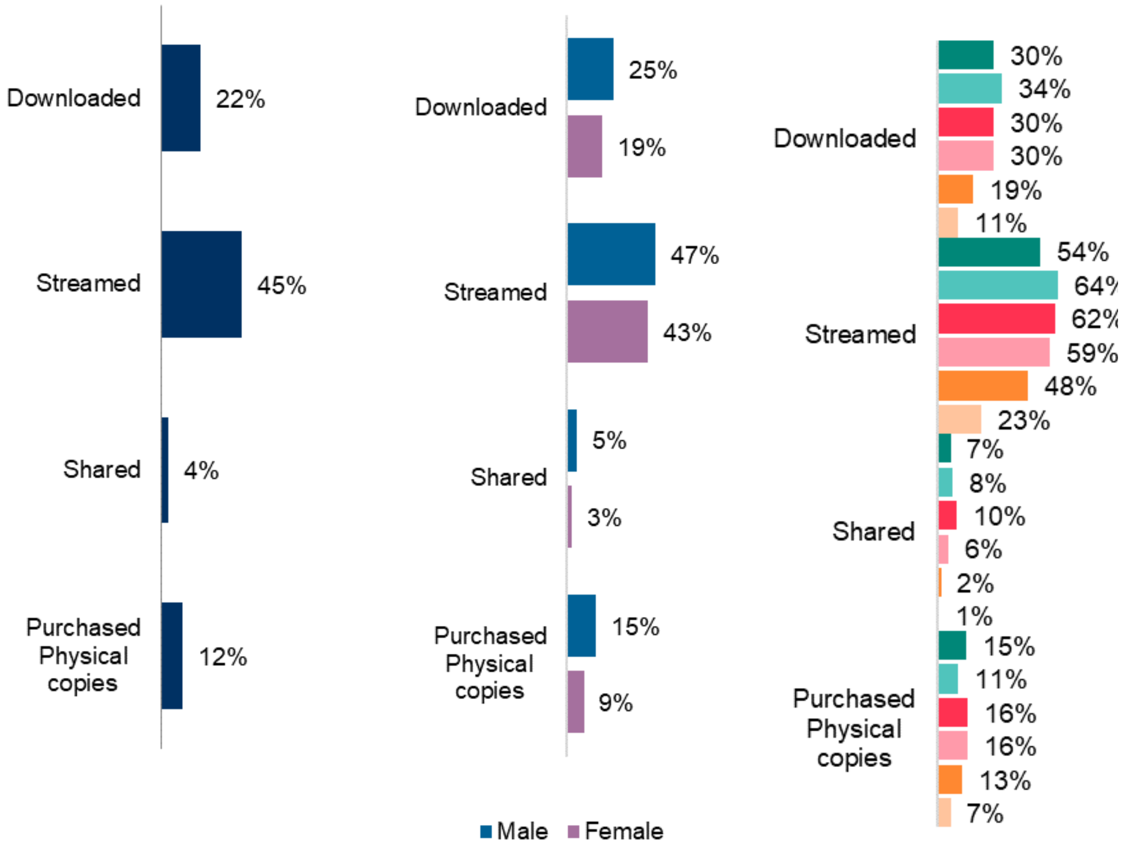
Film

Engaging with film

53% had engaged with film in the previous 3 months (i.e. either by downloading, streaming, sharing or purchasing physical copies).

- **Streaming was, by some way, the most commonly used method of accessing films,** with 45% having done so. It was most common in those aged 16-24 (64%) closely followed by the 25-34 (62%) and 35-44 (59%) age groups. It was around half for those aged 12-15 (54%) and 45-54 (48%) but fell to 23% in the 55+.
- Downloading followed at 22%, with only slightly fewer having purchased physical copies (12%).

B1. Have you downloaded/streamed/shared[1]/purchased physical copies of films in the past 3 months?



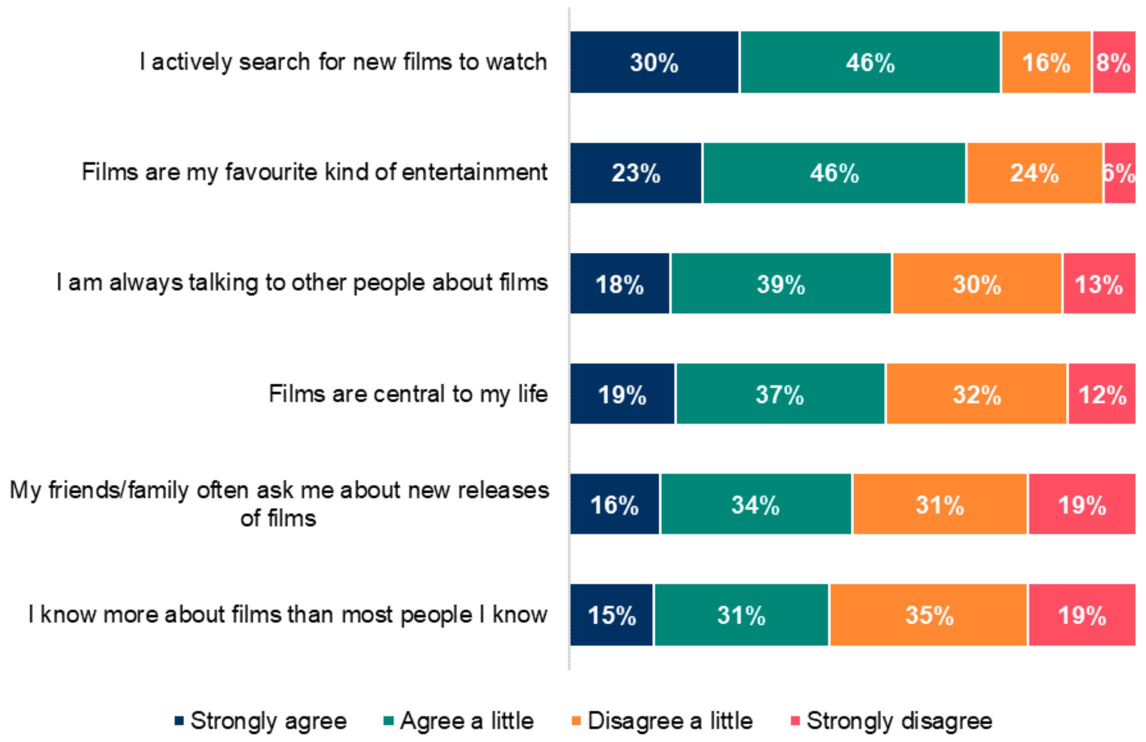
Base: n=5,000 (total sample)

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.

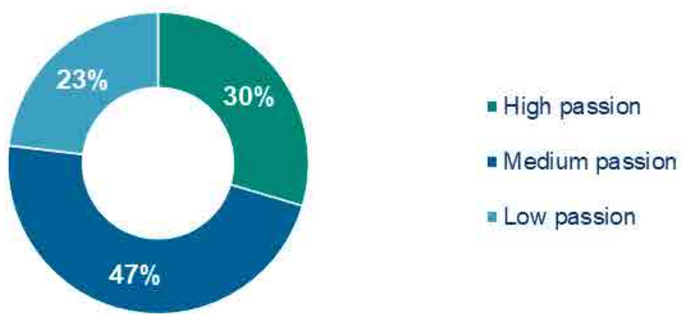
1 The definition of 'shared' was provided as: "By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated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

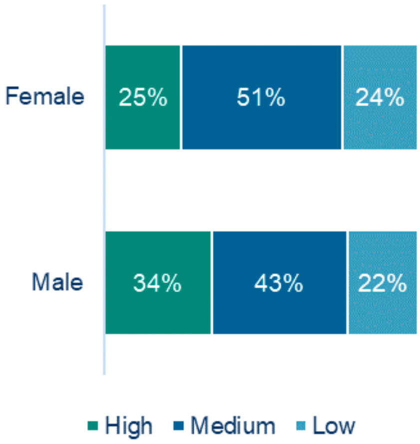
- Three in ten (30%) displayed **high levels of passion for film.** This was most apparent among those aged 25-34 (39%) and among males (which, at 34%, was 9% higher than females).

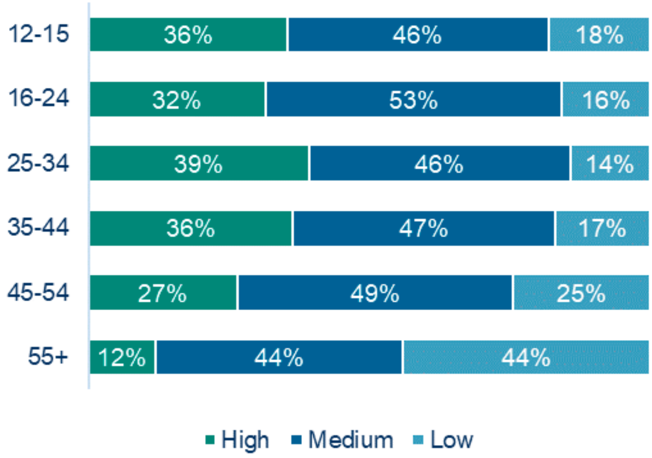
- When looking at individual statements, the **need to discover new films** emerged as a key factor. The most agreed with statement overall (76%) was "I actively search for new films to watch". The preference of films over other forms of entertainment was also important, with 69% agreeing that "Films are my favourite kind of entertainment".



Base: n=2,600 (downloaded, streamed, shared and/or purchased physical copies of films in the past 3 months)







Qualitative insight

Participants in the Online Community reported high levels of engagement with film content, with many saying they dedicated most weekday and weekend evenings to watching films either alone or with family or others in their household. Like other forms of entertainment, during the pandemic, participants felt that watching film content was a form of escapism and a way of exploring an imaginary world to take their minds away from daily life for hours at a time.

There was a sense from some participants that the pandemic had allowed them to appreciate and explore film to a greater extent. This was often the case for those who found themselves with more time and who were able to research the world of film more than ever before, digging into old films and exploring wider content. Some reported that before the pandemic, they often put on films as background entertainment accompanying other tasks and that now, films themselves had become more of a focal point in which they had greater appreciation for the cinematography and acting.

Thinking about the lifting of restrictions, many said they would likely have less time to watch as much film content as they had been throughout the pandemic, owing to the longer format of films which require greater amounts of time and wanting to turn their attention to other activities. However, many said they would keep designated movie nights in their households and keep making time for new content they were interested in.

- *"I was watching films almost everyday. On Saturday and Sunday we would do Movie Marathons where we would watch family movies and action movies. Before being in lockdown we didn't have a lot of time to watch movies so we used this time to watch the things we'd always wanted to. If life were to get completely normal again it would be a challenge to find the time to watch so many films but we will always do our family movie nights."* - Female, 35-44

- *"Although the amount of films I watched didn't change, I definitely felt more relaxed after watching them and instead of entertainment they changed to escapism and I paid a lot more attention to them. I feel like the amount of films I'm watching is not going to change with restrictions being lifted, however I don't think I will be as interested in watching them as I would be filling my day with lots more entertaining things so will probably go back to just putting them on but not fully focussing."* - Female, 16-25

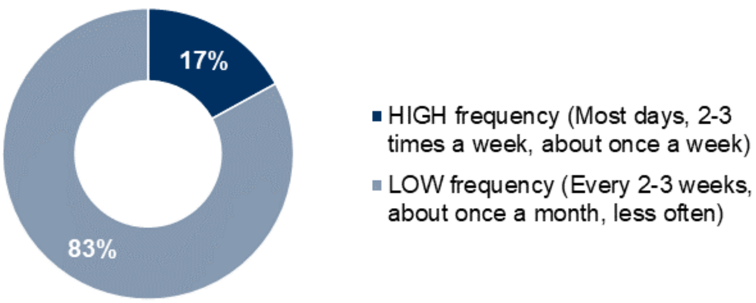
- *"I had plenty of time to spend researching and fully concentrating on movies. I also went back to the old movies and discovered them once again and only now I appreciated their excellent scenery and scenarios along with excellent actors. I might have less time going forward but I will definitely spend two evenings a week watching movies."* - Male, 35-44

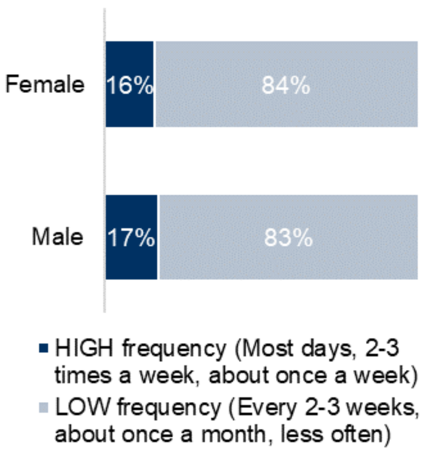
Physical purchasing of film

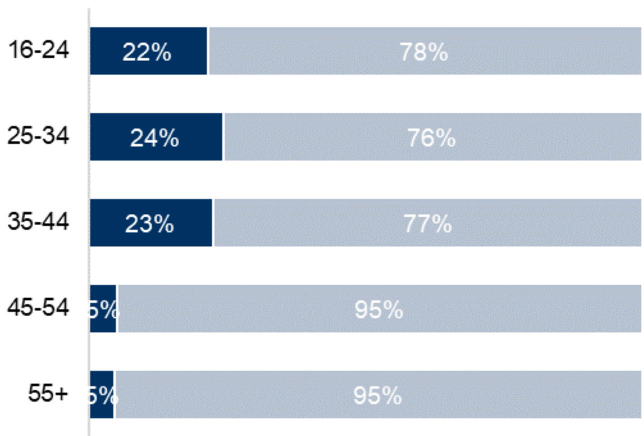
The 12% of respondents who had purchased films in physical formats, such as DVDs or Blu-rays, during the previous 3 months were asked more questions around frequency and number of purchases made.

- Almost one in five (17%) of these were **frequent** (i.e. at least once a week) purchasers of films in physical formats.
- Between 22-30% of those aged between 16-44 were frequent purchasers of films in physical formats. This fell to 5% for those aged 45+.
- Those who had purchased physical copies of films bought an average of 22 films in the previous three months. This was highest in those aged 35-44 (30 films) and was between 17-23 films for all other age groups.

B2. Generally, how often do you purchase physical films?

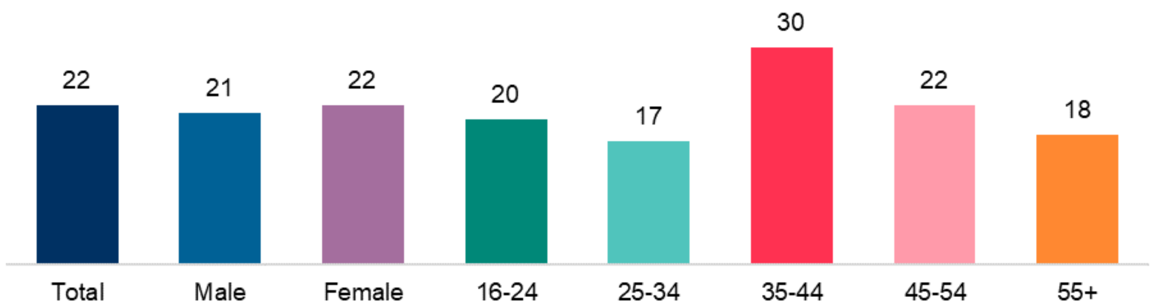






Base: n=577 (purchased physical copies of films in the past 3 months)

B3. In the past 3 months how many physical films did you purchase? (Average purchases)



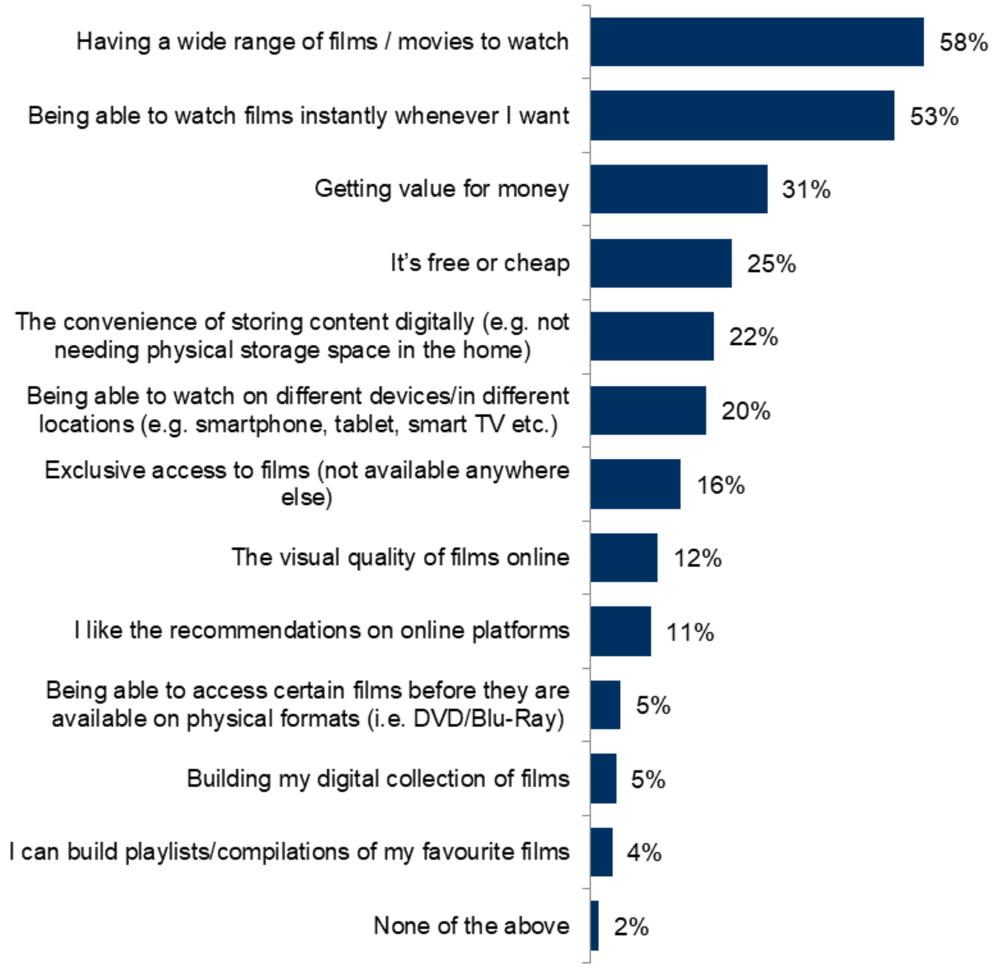
Base: n=564 (purchased physical copies of films in the past 3 months)

Understanding online consumption of film

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

- Two reasons were selected by half or more respondents. These related to the **range of options** available ("having a wide range of films/movies to watch" 58%) and the **ease of access** ("being able to watch films instantly whenever I want" 53%). These top two reasons were consistently selected across gender and age groups.
- The next two most selected responses related to **price.** These included "getting value for money" (31%) and "it's free or cheap" (25%).
- Another group of factors were mentioned by approximately a fifth which included the **"convenience** of storing content digitally" (22%) the **portability** of content, in terms of devices and locations (20%). These were followed by "exclusive access to film" (16%), with no other factor selected by more than 12% of the sample.

B4. What are the main reasons that you choose to access films online (i.e. downloading or streaming) Please select your top 3 (%)



Base: n=2,412 (downloaded or streamed films online in the past 3 months)

Male respondents	Female respondents
1. Having a wide range of films / movies to watch (58%) 2. Being able to watch films instantly whenever I want (49%) 3. Getting value for money (33%)	1. Having a wide range of films / movies to watch (59%) 2. Being able to watch films instantly whenever I want (57%) 3. Having a wide range of films to watch (59%) 4. It's free or cheap (28%)

Aged 12-15	Aged 16-24
1. Being able to watch films / movies instantly whenever I want (54%) 2. Having a wide range of films / movies to watch (51%) 3. Being able to watch on different devices/in different locations (28%)	1. Having a wide range of films / movies to watch (58%) 2. Being able to watch films / movies instantly whenever I want (52%) 3. Getting value for money (26%)
Aged 25-34	**Aged 35-44**
1. Having a wide range of films / movies to watch (57%) 2. Being able to watch films / movies instantly whenever I want (53%) 3. Getting value for money (31%)	1. Having a wide range of films / movies to watch (56%) 2. Being able to watch films / movies instantly whenever I want (48%) 3. Getting value for money (32%)
Aged 45-54	**Aged 55+**
1. Having a wide range of films / movies to watch (63%) 2. Being able to watch films / movies instantly whenever I want (55%) 3. Getting value for money (35%)	1. Having a wide range of films / movies to watch (60%) 2. Being able to watch films / movies instantly whenever I want (57%) 3. Getting value for money (33%)

Downloading film

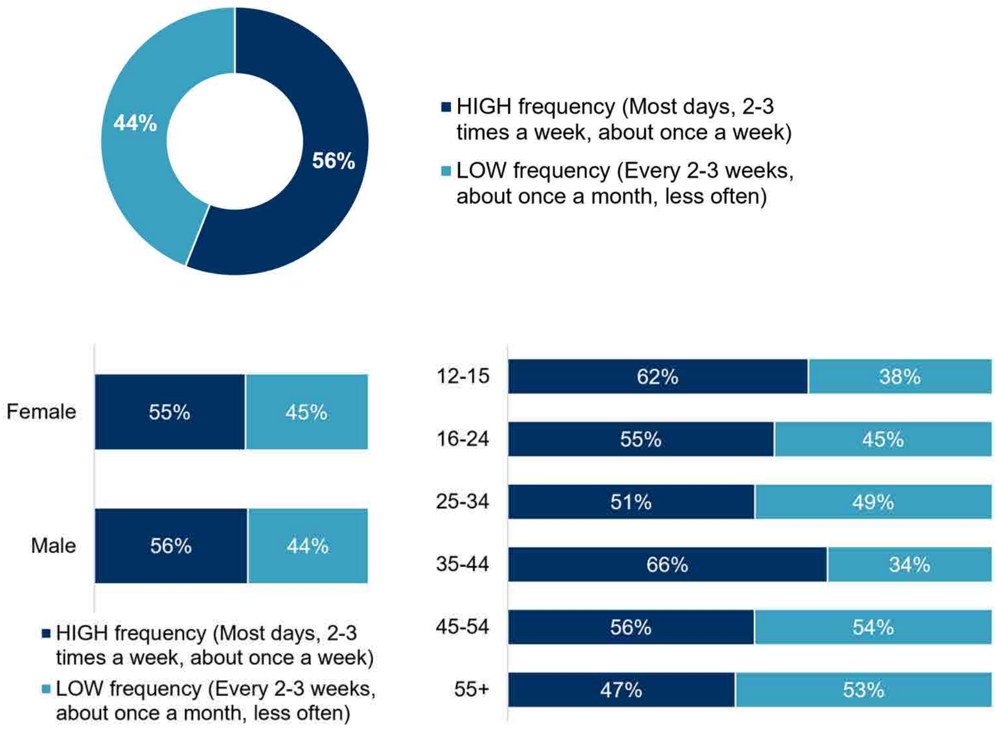
The 22% who had downloaded films during the previous 3 months were asked more questions around frequency, volume and sources used.

Frequency and volume of downloading films

- Over half (56%) of those who downloaded films did so frequently (i.e. at least once a week). The proportion downloading weekly was **fairly consistent across ages,** it was around half (47-56%) for all age groups apart from the 12-15 and 35-44 where it was higher, at 62% and 66% respectively.

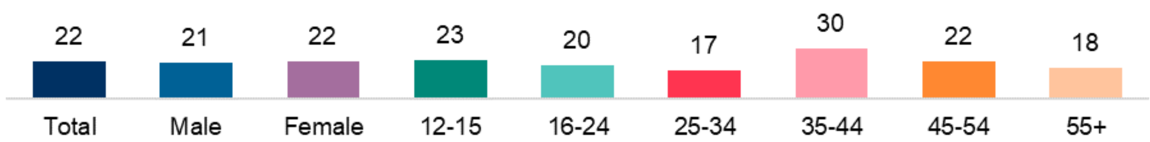
- An average of 22 films were downloaded over a three-month period by those who accessed them in this way. This was highest in those aged 35-44 (30 films) with it ranging between 17-23 films for all other age groups.

B5. Generally, how often do you download films through the internet? (%)



Base: n=1,049 (downloaded films in the past 3 months)

B6. In the past 3 months how many films did you download through the internet? (average number of downloads)



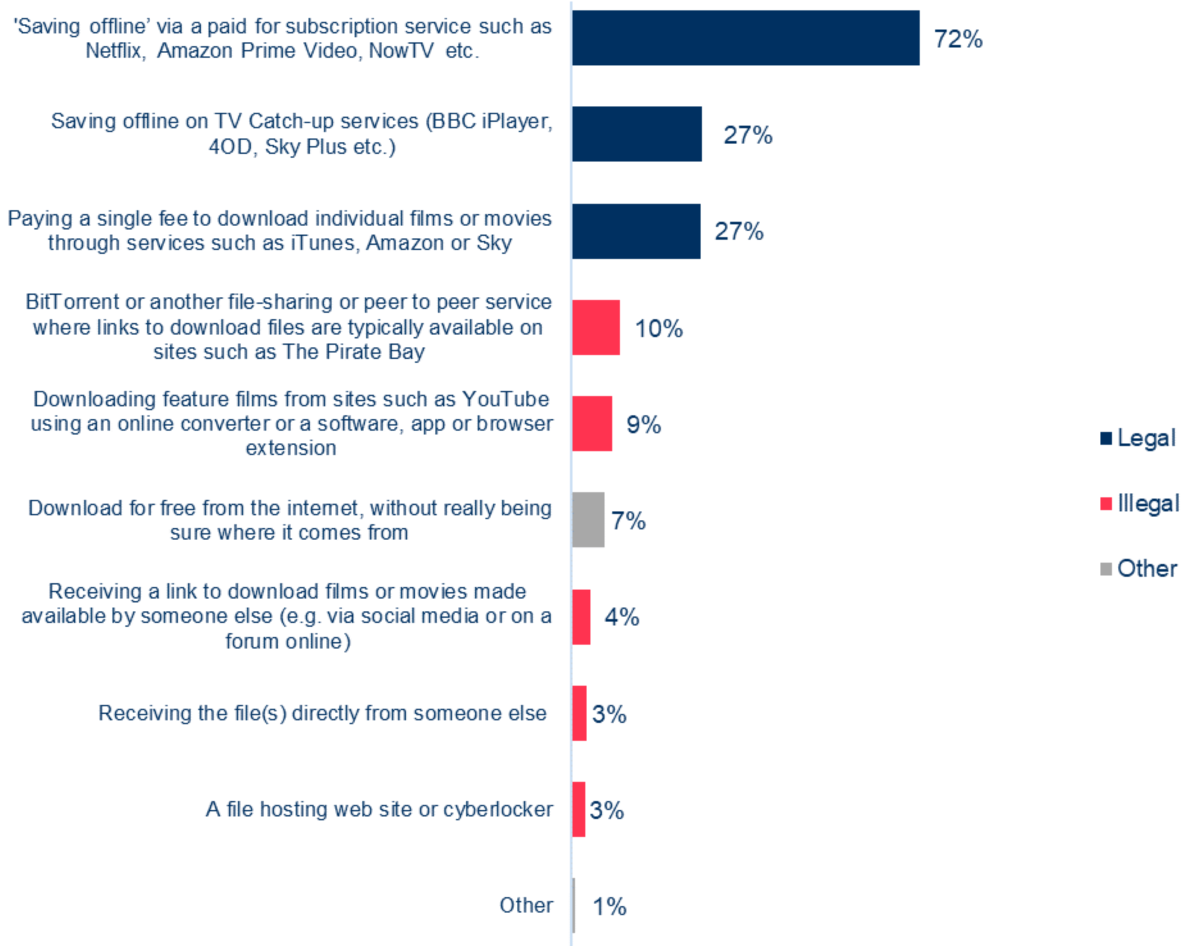
Base: n=1,026 (downloaded films in the past 3 months)

Sources of downloading film

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 three quarters (72%) of all film downloaders. This was followed by around a quarter who were “Paying a single fee to download individual full-length films or movies” (27%) and/or “Saving offline on TV catch-up services” (27%).
- Use of “Saving offline on a paid subscription service” was consistently high across all age groups (72-78%) apart from among those aged 55+ where it fell to 63%.
- The most commonly used illegal methods were using **BitTorrent or another file-sharing peer to peer service** (10%) and **downloading feature films using an online converter** (9%). Other than this, no illegal method was selected by more than 4%.
- Use of “BitTorrent or another file-sharing or peer to peer service” was at least 5% in all age groups but was highest in those aged 16-54 where it was between 10-13%. Use of “Downloading feature films from sites such as YouTube using an online converter or a software, app or browser extension” was highest in the youngest age group (13% in those aged 12-15) and was lowest in the older age groups (6-9% in those aged 16+).

B7. Which of the following have you used to download films in the past 3 months? Please select all that apply. (%)



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
'Saving offline' via a paid for subscription service	69%	76%	74%	75%	78%	70%	72%	63%
Paying a single fee to download individual films or movies	26%	28%	35%	24%	29%	33%	24%	16%
A file hosting web site or cyberlocker	3%	3%	5%	2%	4%	5%	1%	2%
BitTorrent or another file-sharing or peer to peer service where links to download files are typically available	13%	7%	5%	10%	12%	13%	12%	6%
Downloading feature films from sites such as YouTube using an online converter or a software, app or browser extension	9%	8%	13%	9%	6%	9%	9%	7%
Saving offline on TV Catch-up services	27%	27%	22%	21%	22%	27%	31%	39%
Receiving the file(s) directly from someone else	3%	4%	4%	3%	4%	4%	3%	1%
Receiving a link to download films or movies made available by someone else	4%	4%	5%	5%	5%	4%	1%	4%
Download for free from the internet, without really being sure where it comes from	6%	8%	9%	9%	5%	6%	7%	6%

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

Base: n=1,049 (downloaded films in the past 3 months)

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

Those unsure of the source of their downloads were asked to explain more in their own words about how they obtained them.

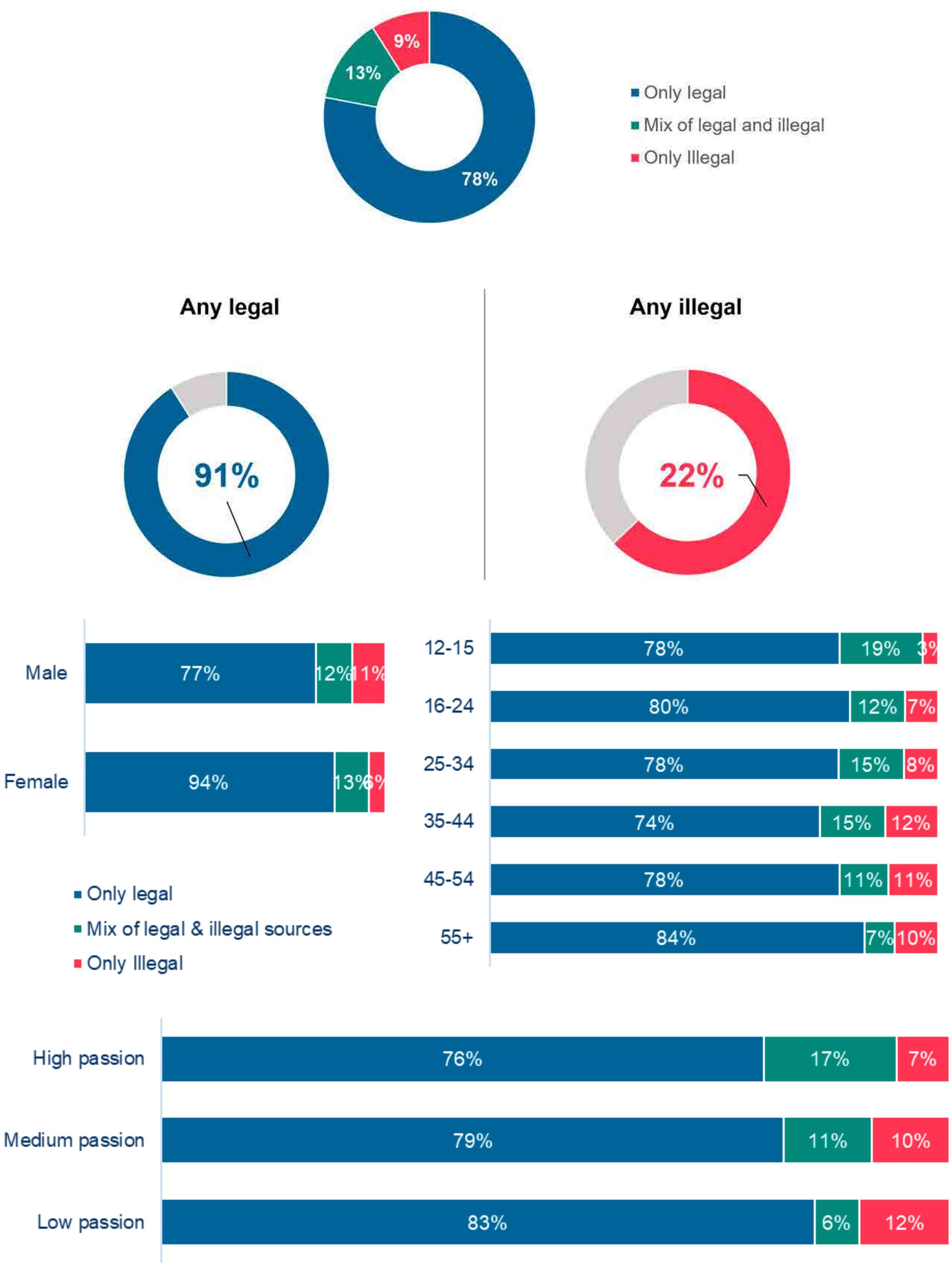
The most common means of downloading films/movies through an unknown source was by using a search engine to find websites with functioning download links for their desired content. Most using this method visited different websites each time they downloaded a new film/movie. Other means of downloading from unknown sources included watching films/movies downloaded and shared by friends and being directed to film/movie downloads through the comments sections on websites such as YouTube.

Legality of film downloads

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

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

- Legal Sources:
  - Overall, 91% had used at least one legal source to download films.
  - The highest proportion (78%), by some way, had used legal sources only.
  - Use of only legal sources was between 74-84% in all age groups.
- Illegal Sources:
  - 22% had used at least one illegal source to download films.
  - 9% had used illegal sources only to download films.
  - Use of only illegal sources was lowest in those aged 12-15 (3%) and was between 7-12% in all other age groups.
  - Downloading films from illegal sources accounted for 13% of all film downloads.
- Mixed:
  - 13% had used a mix of legal and illegal sources.



Base: n=1,015 (downloaded films in the past 3 months, with those who selected 'other' or 'not sure of source' removed).

B8. And how is the way you download films typically split across the following sources? (average % of their time and average number of downloads)

Legality	Source	Average % of usage split
Legal	'Saving offline' via a paid for subscription service	59%
	Paying a single fee to download individual films or movies through services	13%
	Saving offline on TV Catch-up services	11%
Illegal	BitTorrent or another file-sharing or peer to peer service where links to download files are typically available	2%
	BitTorrent or another file-sharing or peer to peer service where links to download files are typically available on sites	6%
	Downloading feature films from sites such as YouTube using an online converter or a software, app or browser extension	4%
	Receiving the file(s) directly from someone else	1%
	Receiving a link to download films or movies made available by someone else	1%
	A file hosting web site or cyberlocker	1%
Other	Download for free from the internet, without really being sure where it comes from	4%
	Other	1%

Base: n=1,049 (downloaded films in the past 3 months)

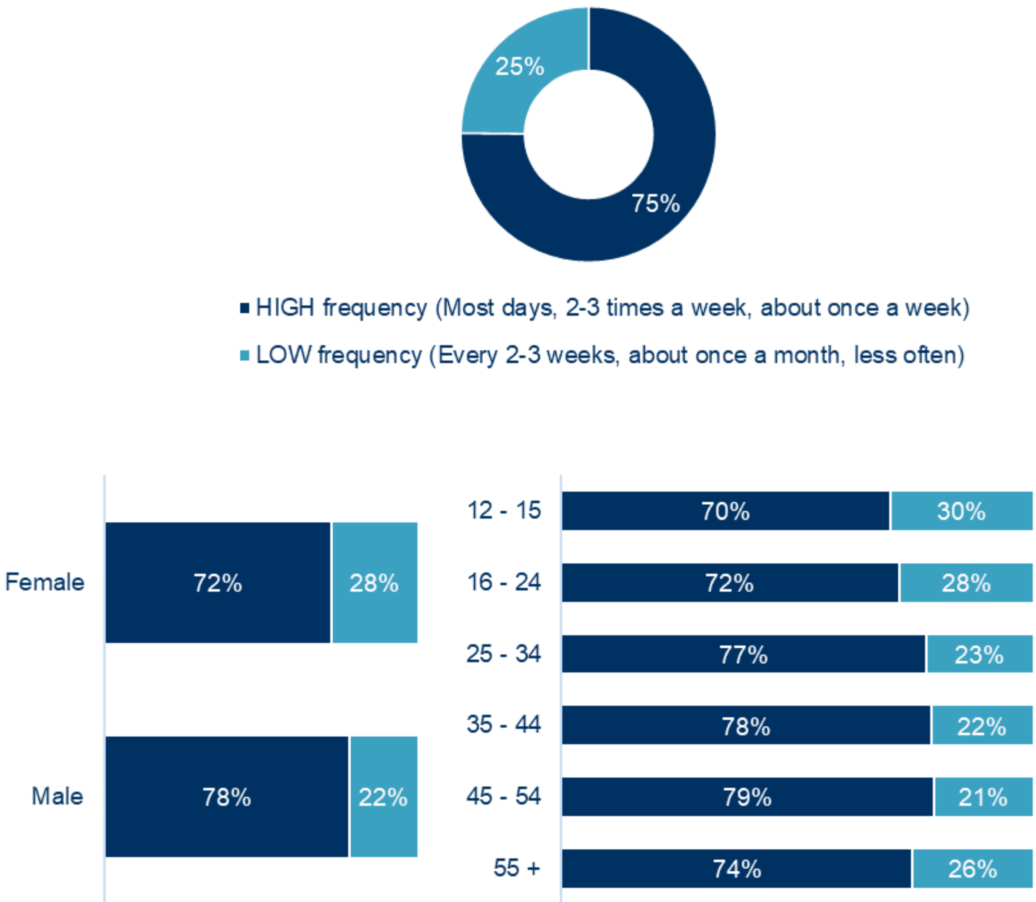
Streaming films

The 45% who had streamed films online during the previous 3 months were asked questions around frequency, volume and sources used.

Frequency and volume of films

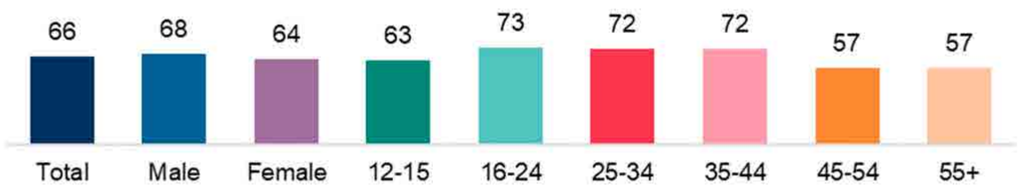
- **Three quarters (75%) were frequent streamers of films,** doing so weekly. This was notably higher than the proportion who were frequent downloaders of films within the same time period (56%). A relatively even proportion across all age groups were frequent streamers of films, ranging from 70-79%.
- **Film streamers spent an average of 66 hours streaming in a three-month period.** This was highest in those aged 16-44 where it ranged from 72-73 hours. They were followed by those aged 12-15 who spent 63 hours watching films with the 45+ spending 57 hours.

B9. Generally, how often do you stream films through the internet? (%)



Base: n=2,203 (streamed films in the past 3 months)

B10. In the past 3 months how many hours did you spend streaming films through the internet? (Average number of hours)



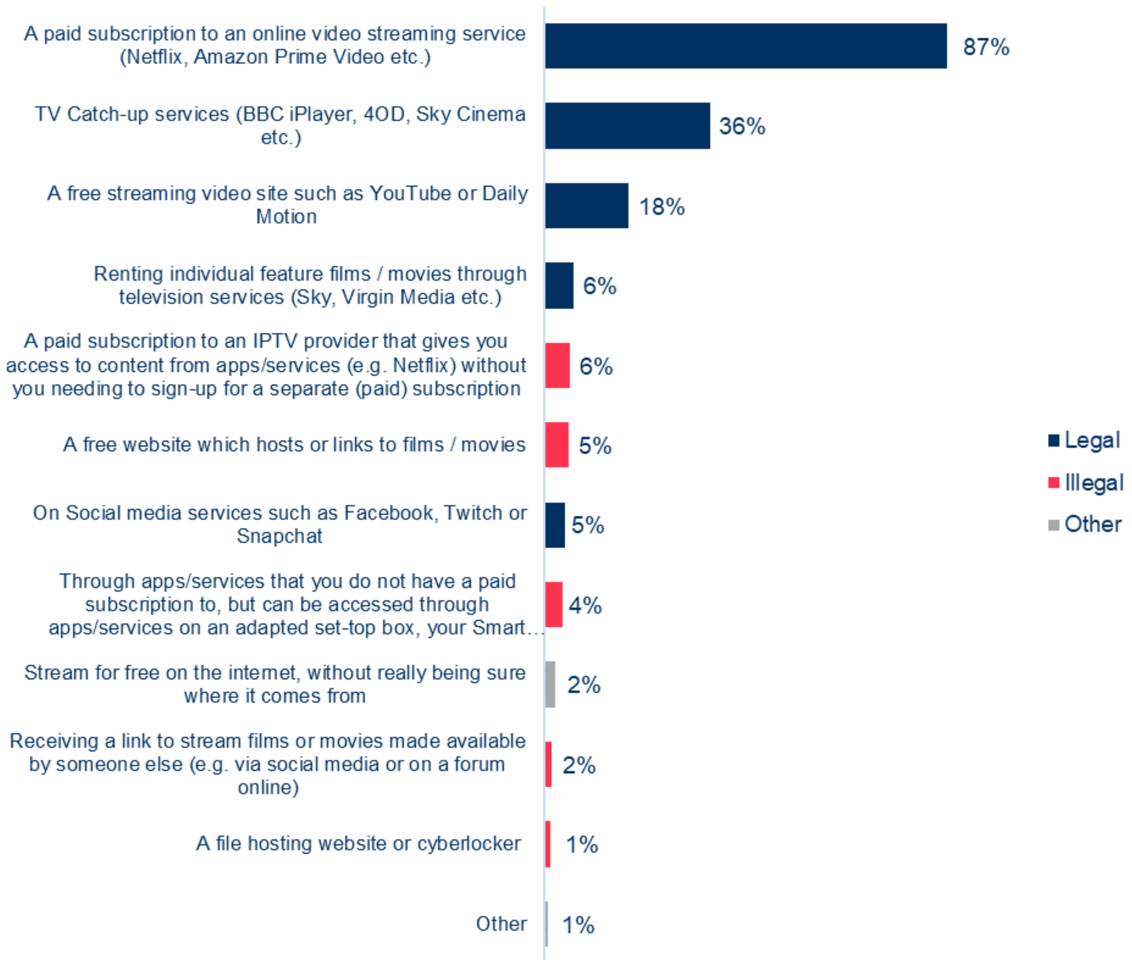
Base: n=2,165 (streamed films in the past 3 months)

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: **87% used a "paid subscription to an online video streaming service"**. This was followed by "TV Catch-up services" (36%) and "a free streaming video site such as YouTube" (18%).
- **No single illegal source was used by more than 7%** of film streamers. Of these, "a paid subscription to an IPTV provider" (6%) and "a free website which hosts or links to films" (5%) were the most common.
- Those aged 16-24 were more likely to use "a free website which hosts or links to films" (11%) when compared to older and younger age groups (where it ranged between 2-7%).

B11. Which of the following have you used to stream 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.)	86%	88%	91%	89%	91%	88%	87%	78%
A paid subscription to an IPTV provider that gives you access to content from apps/services (e.g. Netflix) without you needing to sign-up for a separate (paid) subscription	7%	5%	8%	5%	6%	8%	4%	4%
On Social media services such as Facebook, Twitch or Snapchat	6%	4%	4%	8%	7%	5%	2%	2%
A free streaming video site such as YouTube or Daily Motion	20%	16%	19%	19%	20%	15%	15%	22%
A file hosting website or cyberlocker	1%	1%	0%	2%	2%	1%	1%	1%
TV Catch-up services (BBC iPlayer, 4OD, Sky Cinema etc.)	34%	38%	28%	26%	27%	35%	42%	54%
Renting individual feature films / movies through television services (Sky, Virgin Media etc.)	7%	6%	10%	4%	7%	10%	4%	4%
A free website which hosts or links to films / movies	5%	6%	3%	11%	7%	4%	4%	2%
Through apps/services that you do not have a paid subscription to, but can be accessed through apps/services on an adapted set-top box, your Smart TV, mobile devices or entertainment sticks such as the Amazon Fire Stick or the Google Chromecast	4%	4%	3%	5%	3%	5%	5%	4%
Receiving a link to stream films or movies made available by someone else (e.g. via social media or on a forum online)	2%	2%	1%	2%	1%	3%	2%	2%
Stream for free on the internet, without really being sure where it comes from	3%	2%	2%	5%	3%	3%	1%	1%

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

Base: n=2,203 (streamed films in the past 3 months from the listed sources)

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

Those unsure of the source of their streaming were asked to explain more in their own words about how they obtained them.

Most of those unsure of their source used search engines to find websites hosting a stream of a film/movie that they wanted to view. Few had a “go-to” website to stream films/movies, however many followed a similar procedure each time they streamed a film/movie. This frequently included entering the title of a film in a search engine, followed by the phrase “online free” or “free stream.”

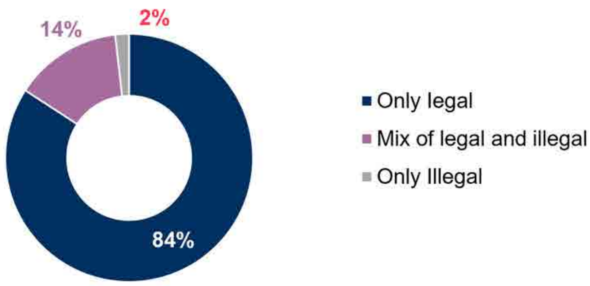
Some respondents who streamed films/movies from unknown sources viewed streams provided by their friends, or from online forums.

Legality of film streaming

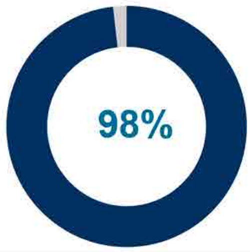
To better understand the distribution of sources across legal and illegal categories, those who had streamed films in the previous 3 months were grouped into the following (mutually exclusive) categories: using only legal sources, only illegal sources or a mix of the two.

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

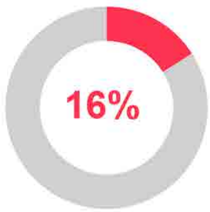
- **Legal:**
  - 98% had used a legal source to stream films.
  - 84% had used legal sources only to stream films.
  - Use of only legal sources ranged between 79-87% for all age groups.
- **Illegal:**
  - 2% had used only illegal sources to stream films.
  - 16% had used an illegal source to stream films.
  - Use of only illegal sources was highest in those aged 16-24 (18%) and was between 10-13% for all other age groups.
  - 15% of all time spent streaming films was done so using illegal sources.
- **Mixed:**
  - 14% used a mix of legal and illegal sources to stream films.

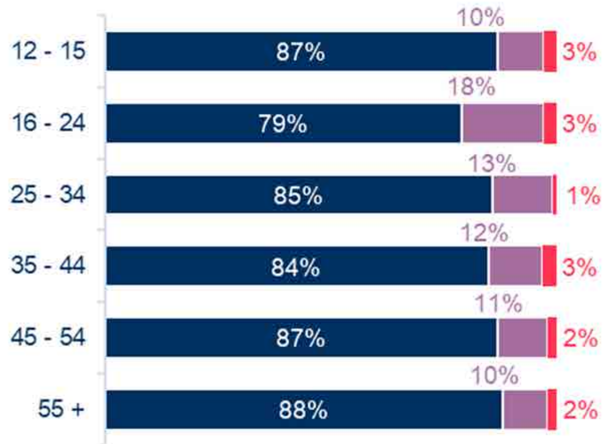


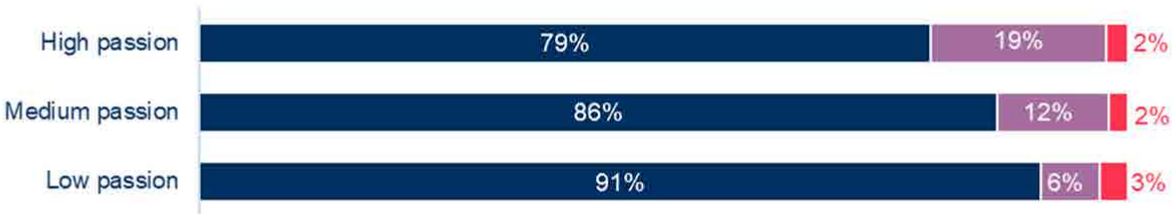
Any legal



Any illegal







Base: n=2,179 (streamed films in the past 3 months, with those who selected 'other' or 'not sure of source' removed)

B12. And how is your film streaming time typically split across the following sources?

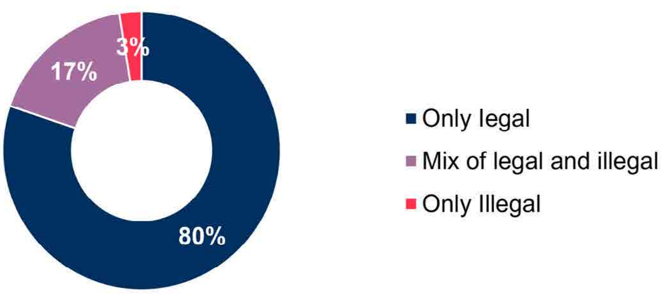
Legality	Source	Average % of usage split
Legal	A paid subscription to an online video streaming service	72%
	TV Catch-up services	12%
	A free streaming video site such as YouTube or Daily Motion	6%
	On Social media services	1%
	Renting individual feature films / movies through television services	1%
Illegal	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	3%
	A free website which hosts or links to films / movies	2%
	Through apps/services that you do not have a paid subscription to, but can be accessed through apps/services on an adapted set-top box, your Smart TV, mobile devices or entertainment sticks	1%
	Receiving a link to stream films or movies made available by someone else	0%
	A file hosting website or cyberlocker	0%
Others	Stream for free on the internet, without really being sure where it comes from	1%
	Other	1%

Base: n=2,203 (streamed films in the past 3 months)

Combined downloading and streaming of film

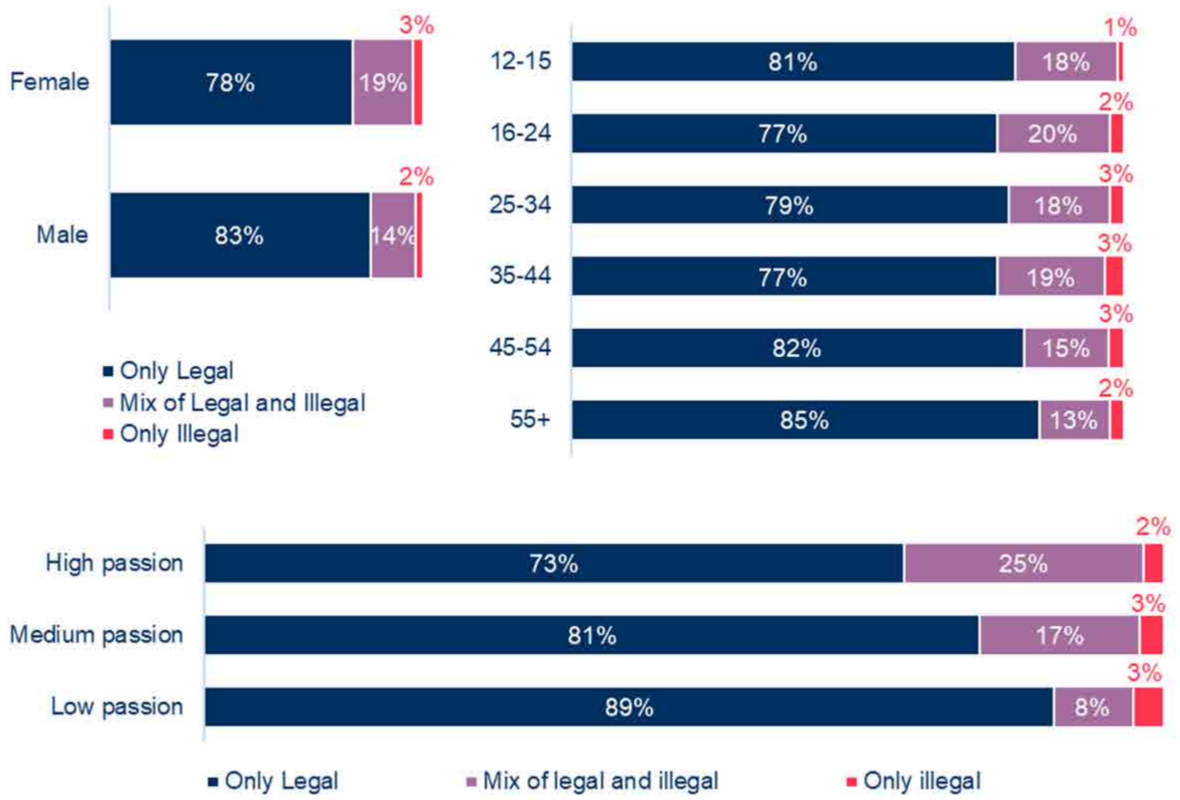
The use of legal and illegal sources for film access (i.e. for both downloading and streaming) were combined to allow us to look at the category as a whole. We would, however, express caution when interpreting these results, owing to the distinct differences in the legal and illegal figures for downloading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

- Only Legal:
  - **Eight in ten (80%)** consumed films online using only legal sources.
  - om 77% to 85%.



ms online.

ı for films (25%, which was 8% higher than
with a 'low' passion).



Base: n=2,383 (streamed and/or downloaded films from a legal or illegal source, with those who only selected 'not sure of source' removed)

Qualitative insight

In regard to streaming sources for film content, participants who engaged in infringing behaviours often paid for streaming services such as Netflix and Amazon Prime. However, on occasions when they could not find the films they wanted on their paid streaming services, they opted for an illegal source, such as websites which hosted links to free film streams so that they could access content at no cost and without having to set up a new subscription.

When it came to downloading film content, Online Community participants commonly mentioned downloading via BitTorrents or converting video files of films from YouTube and receiving film files on USB from friends or family. These methods of downloading were seen to offer more choice of content at no extra cost and those who had been using these methods for many years had found trusted sources which they felt they could use safely and without many concerns.

This year, a few participants mentioned that having access to these free sources of film had been particularly important because they felt their financial situation during the pandemic had deteriorated. However, even those who did pay for multiple streaming services still felt access to free sources was valuable, especially those who had more free time to fill this year, because despite holding multiple subscriptions, they were still unable to access all the content they wanted via paid methods.

As seen in previous years, the division of film content across multiple streaming services appeared to be a barrier to access for many participants. Even if participants were open to paying for film content in general, the need to pay for three or more services in order to be able to access everything they wanted was seen by many as unrealistic or frustrating. This was a particular consideration during the period of lockdowns when some participants noted that they weren't seeing new film content on the services they were paying for. This in turn contributed to access via unofficial means in order to find more content.

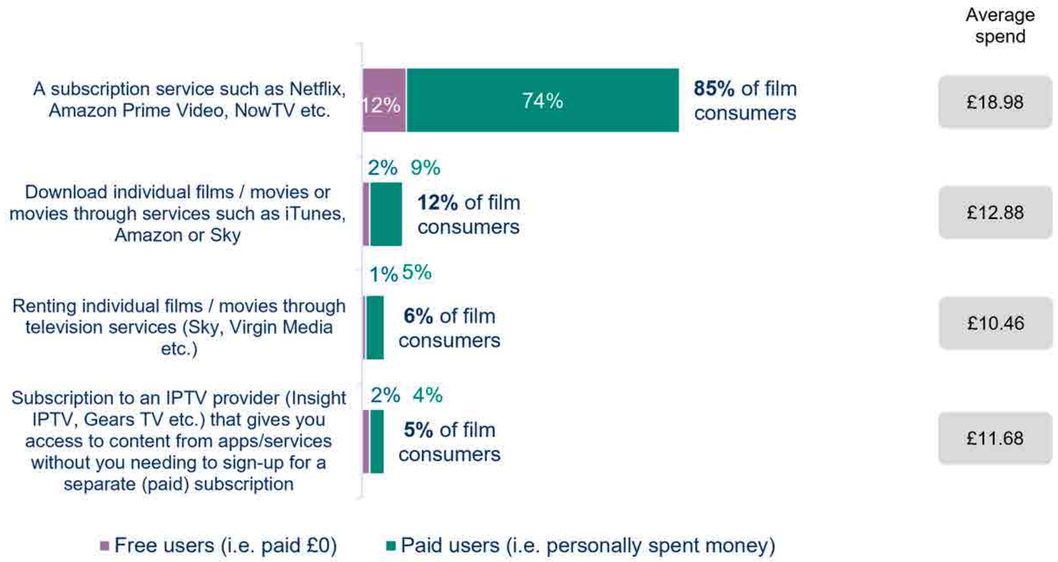
- *"These free sources have been very important methods in the last year, having more time to watch films but no new films being added to paid sites. It was important to have more variety but not to have to pay more. I already pay for Sky, discovery+, Netflix and Amazon Prime. I find having more platforms means there is usually always something to watch but I do find this a bit annoying having to go between one app, then another, then another."* - Female, 16-25
- *"I download films from sites such as YouTube using an online converter. It's free, convenient and has a good range of films. I've been using this method for a few years now, this access has been very important during the past year, working from home and because I do not hold paid subscriptions."* - Female, 25-34
- *"I usually stream movies from a free website like Soap2Day and sometimes on YouTube. I love having free access on sites as some content I like is American and I can't really get it everywhere. As a family we do have Netflix, Disney and Amazon Prime but about 2 out of 5 times I find that a film I want to see isn't on one of the streaming sites we pay for."* - Female, 35-44

Paying for film

Those who had used a paid source to either download or stream films were asked how much they had personally spent on each source in the past month.

- Eight in ten (85%) film consumers had used **a paid subscription service** (e.g. Netflix) in the previous three months. Most of these (74% of film consumers) had personally paid to do so in the past month with 12% using them without doing so. They spent, on average, £18.98 each month.
- The other two legal means of streaming or downloading films ("download individual films through services such as iTunes" or "renting individual films/movies though television services") were used by 12% and 6% of the sample respectively in the previous three months. They paid, on average, between approximately £10-12 each month for each of those.
- A relatively small proportion (5%) had a paid subscription to an IPTV provider. The amount they paid on average each month (£11) was similar to that spent on legally downloading or renting films.

B13. Approximately how much do you personally spend each month on the below sources of streaming or downloading films? (£ average amount spent each month by users of that source)



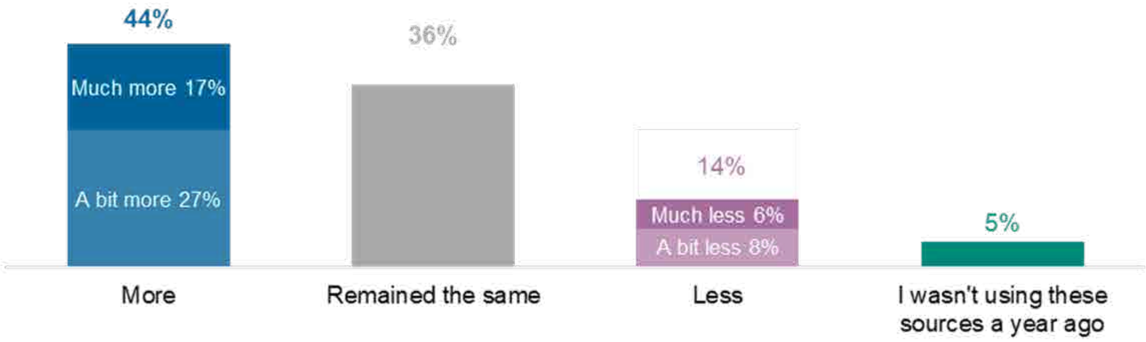
Base: n=2,412 (streamed and/or downloaded films), n=11-2,132 (those who used each of the sources to stream/download video games)

Change in use of illegal sources

Those who had used an illegal source to download or stream films were asked how the use of these sources compares to the same point a year ago.

- Respondents were most likely to say that they were using these sources more (44%), which was closely followed by those whose usage had remained the same (36%). A relatively small number said their usage had decreased (14%) or that they weren't using these sources a year ago (5%).

B14. You said you download or stream films using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=465 (downloaded and/or streamed films illegally)

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

Those who had used illegal sources **more** in the last year frequently cited COVID-19 as impacting their increased usage. Increased time at home, and the need to fill that time, were commonly mentioned by these respondents. Many also used these sources to replace media that they had stopped consuming in the last year. For some this was related to the pandemic, such as the closing of cinemas, while others had simply lost interest in the types of content they had previously consumed, including terrestrial television.

- *"Due to the pandemic and not being able to physically purchase a film or attend the Cinema to see it on the big screen. Easier to download quickly and view great films in the comfort of my own home. It's also safe and away from the risk of infection."* - Male, 45-54

- *"As we have spent most of the year in lock down and cannot leave the house, you have to stream films and more as normal TV has been abysmal, and during the winter it was too cold to do other activities outside such as gardening or fitness."* - Male - 35-44

Those who had used illegal sources **less** frequently in the last year often mentioned an increased usage of paid video streaming platforms such as Netflix, with many citing an increase in both the quality and quantity of content available on those services as motivating their decreased usage of illegal sources. For some, COVID-19's disruption of daily routines resulted in watching fewer films/movies overall, thereby decreasing their usage of illegal sources.

- *"Because more and more movies are being released on accessible paid for services like Netflix and available instantly at a good price."* - Male, 35-44
- *"There is currently more content available on subscription sites. If more films were available to immediately stream at reasonable cost, then I would not need to use illegal sources at all."* - Female - 45-54
- *"I normally would travel, and when I did travel, I would watch movies to pass the time but now we can't travel so don't really watch many movies."* - Male 16-24

Of the few that had **started** to use illegal sources to watch film/movies in the past year, many had done so to fill increased leisure time that they had to spend at home due to COVID-19. A few others started to use illegal sources simply because they became aware of them in the last year.

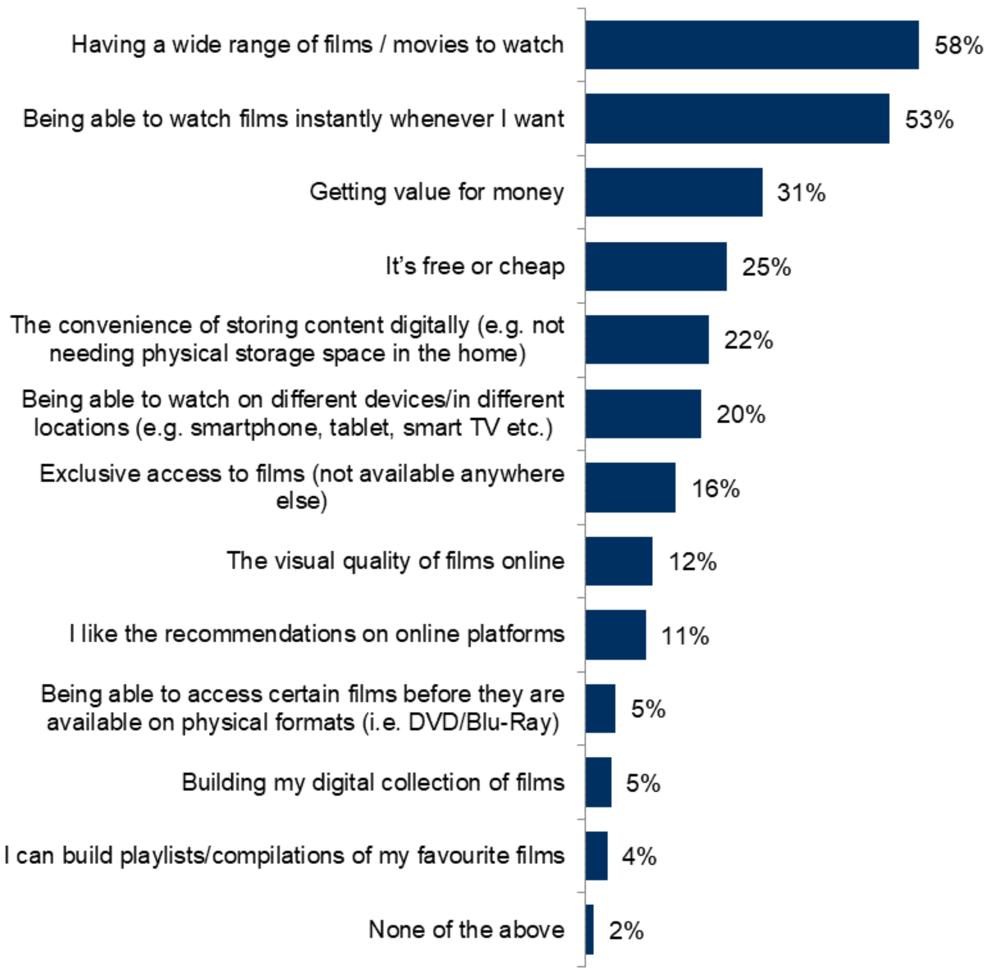
- *"I started using the sources because I heard about them from a friend."* - Female, 25-34
- *"Lockdown and isolation led me to finding new ways to watch movies."* - Female, 55+

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 films illegally.

- Overall, the **most commonly chosen option was a paid one,** with over a third (39%) saying that they would "pay for a subscription or use a paid for premium tier of a video streaming service".
- Interestingly, no other single option was selected by more than 17%, with 9% indicating that they were not sure what they would do. There did, however, appear to be a slight preference for free options; "TV catch-up services" and "Watch for free via sites such as YouTube" were selected by 17% and 13% respectively.

B15. If films 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	37%	41%	33%	35%	51%	39%	36%	30%
Watch for free via sites such as YouTube or Daily Motion	14%	13%	11%	10%	11%	17%	16%	15%
Paying a single fee to download individual full-length films or movies through services	8%	6%	17%	4%	7%	9%	7%	4%
Social media services	3%	3%	2%	6%	4%	3%	1%	1%
TV Catch-up services	16%	18%	18%	21%	12%	12%	17%	24%
Renting individual feature films through television services	4%	3%	2%	1%	4%	6%	4%	2%
Buy films on DVD, Blu-Ray or another physical format	7%	5%	11%	8%	3%	9%	3%	5%
Other	3%	1%	0%	1%	1%	1%	6%	4%
Not sure / don't know	9%	9%	6%	14%	6%	6%	9%	15%

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

Base: n=465 (downloaded and/or streamed film illegally)

Qualitative insight

Participants who already held paid subscriptions felt they would be slightly inconvenienced by the removal of free, unofficial sources but that they would make do with the content available to them via the legal means they currently used (most often streaming services). Some felt this would likely reduce the total amount of films they consumed, rather than purchasing additional subscriptions or using other paid alternatives. Those who did not currently pay for any subscriptions said they would have to put more effort into accessing the content they wanted, either by using catch up services or even buying physical copies of films, but that they would not readily take up paid subscriptions due to the cost.

As an alternative to the division of content across multiple services, the idea of one designated platform to watch all films was seen as very popular. Participants said they would be willing to pay a maximum of £20 per month for such a service and that this felt like good value for money in terms of access to film content without the hassle of having to switch platforms or search for content via unofficial sources.

- *"I have access to all the above methods so would not be too upset if I could only use these sources. I tend to use paid subscriptions (Prime and Netflix) over anything else. What makes me occasionally use unofficial sources is because I feel these paid subscriptions rarely add new content so I have to search for it elsewhere. I think I would just consume less content and focus on my paid subscriptions or normal TV... It would be ideal to have all platforms in one place! Or linked up. I would pay max. £20."* - Female, 16-25

- *"I'd feel a bit disappointed if free sources for film access were no longer available. My experience would be somewhat inconvenienced as I'd need to search for alternative means of access. I might resort to using TV Catch-up and buying films on DVD because at least catch-up TV still allows access to films and with DVDs I get to physically own and keep the films."* - Female, 25-34

- *"Netflix and BBC iPlayer are very good, the rest are all over rated and asking for too much cash so I don't think I'd take up any other subscriptions. We would just end up reading more books and turning the telly off, unless the access was at a reasonable cost. I think £15-20/month is a reasonable price for a comprehensive film platform."* - Male, 55+

TV Programmes/Series

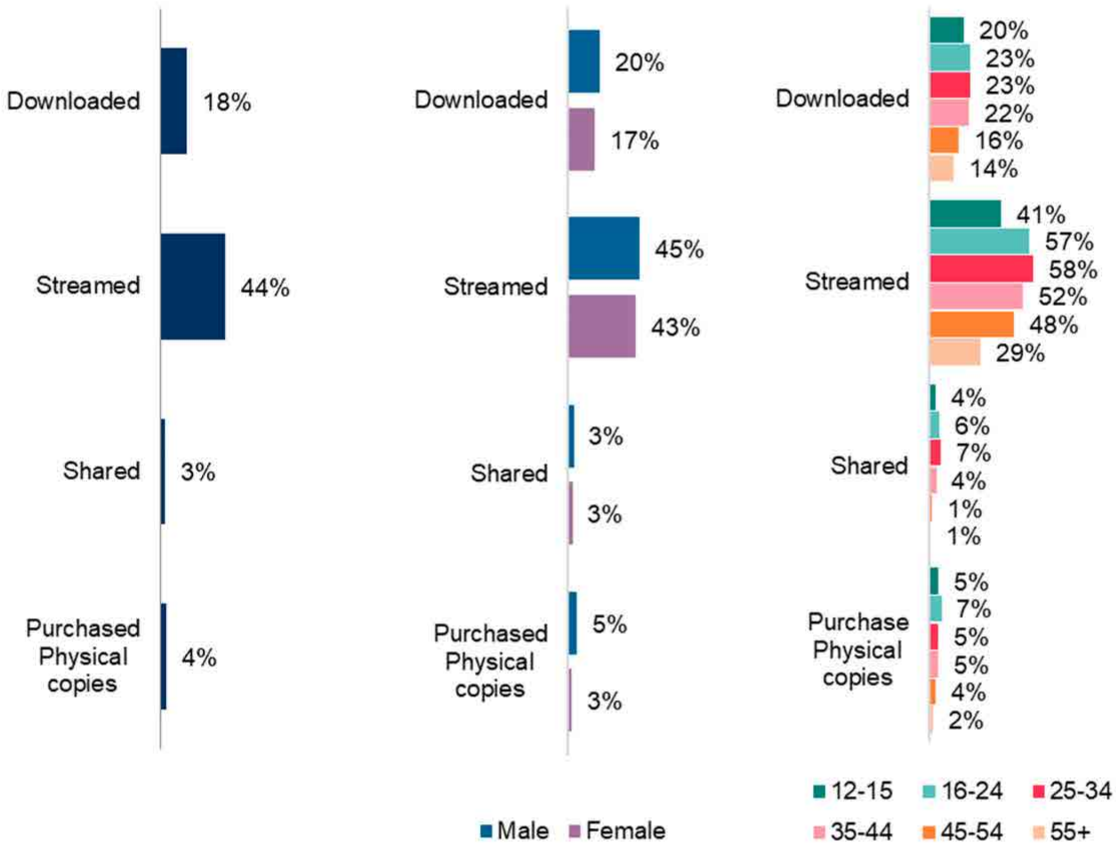
Engaging with TV Programmes/Series

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

- **Streaming was, by some way, the most common method of accessing TV programmes/series,** with 44% having done so. It was even higher among those aged 16-34, which ranged from 57-58% in those age groups. This was followed by those aged 35-44 (52%) and 45-54 (48%), with the 55+ quite a bit lower (29%).

- The proportion who had **downloaded TV programmes/series** followed by some way at 18%, with just 4% having purchased physical copies.

C1. Have you downloaded/streamed/shared[1]/purchased physical copies of TV programmes/series in the past 3 months?



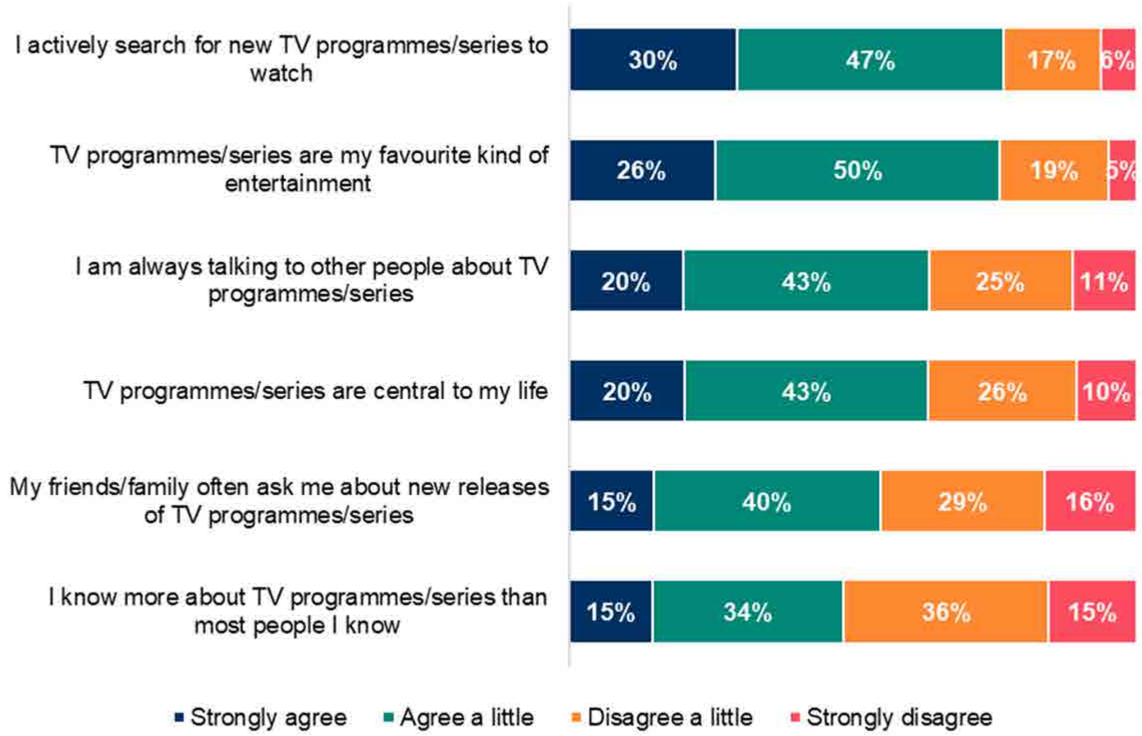
Base: n=5,000 (total sample)

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

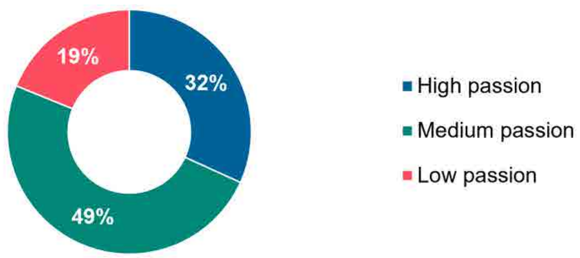
To get a broader sense of **their passion for TV programmes/series,** respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

- Around a third (32%) displayed **high levels of passion for TV programmes/series,** This was most apparent among those aged 25-34 (44%). It was also high in younger respondents (36-37% of the 12-24) but tended to steadily decline with age (e.g. only 15% of those aged 55+ were in the High category).

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



Base: n=2,445 (downloaded, streamed, shared and/or purchased physical copies of TV series in the past 3 months)



Qualitative insight

In the Online Community, most participants were highly engaged with TV programmes/series, watching content every day over the past year and reporting that the pandemic had made this content more important to them. Participants used TV programmes/series as a way of escaping from the day to day reality of the pandemic and as a way of bonding with family or others in the household through the shared experience of watching TV content together.

However, a few mentioned having to put extra effort into finding new TV content this year, with the pandemic meaning fewer programmes/series were being made. This didn't appear to reduce consumption for these participants, rather they simply searched wider for more content.

Moving forward, many participants said that as restrictions lifted they would spend less time watching TV content, in favour of doing more activities outside or due to having to go back into offices and losing some of the free time at weekends or in the evenings. A few, however, reported that they had discovered a new love for TV content during lockdown and that having become used to watching higher levels of content, they were likely to continue.

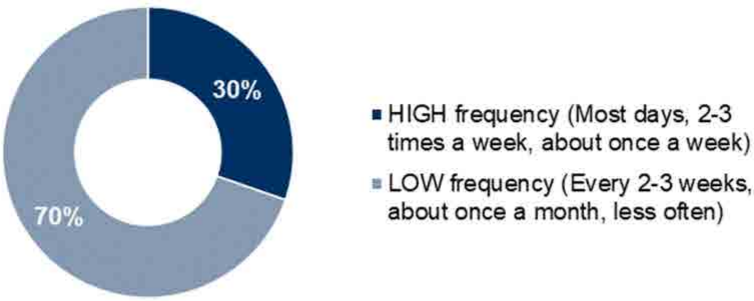
- *"I did feel reliant on TV series as they really did help me mentally and made me focus on subjects and topics well away from Covid. I am now accessing TV series and shows less since restrictions are lifting because I am now meeting up with people at the weekends which has made me less dependent on TV series and shows."* - Female, 45-54
- *"Before lockdown we would only watch TV when we couldn't sleep or for a specific show we had heard about whereas since the pandemic we have been watching far more. I think TV in general allowed us to focus our attention on other things opposed to the pandemic enveloping the community around us. TV shows which spark my interest allow me to unwind and disengage my mind for a while which has also seen my sleep cycle improve."* - Male, 25-34
- *"Before Covid-19 I watched far less than I do now. I have basically turned into a TV nerd and enjoy watching shows more than ever. We have got into so many brilliant shows that it's impossible to stop watching now just because lockdown is over."* - Male, 25-34

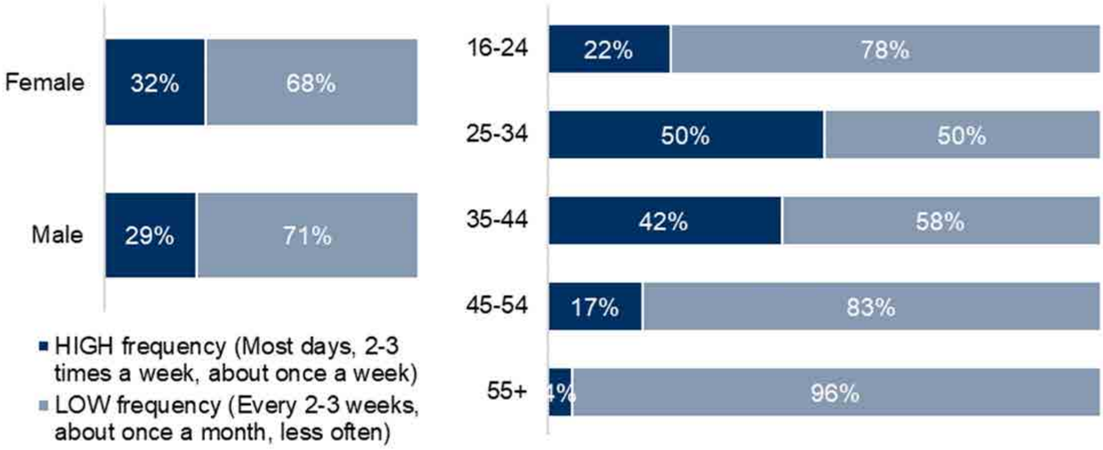
Physical purchasing of TV programmes/series

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

- Three in ten (30%) were **frequent purchasers** of TV programmes/series in physical formats.
- They purchased an average of 12 items in a three-month period.
- Smaller sample sizes for individual age groups (i.e. all below n=50) means that these results should be interpreted with caution.

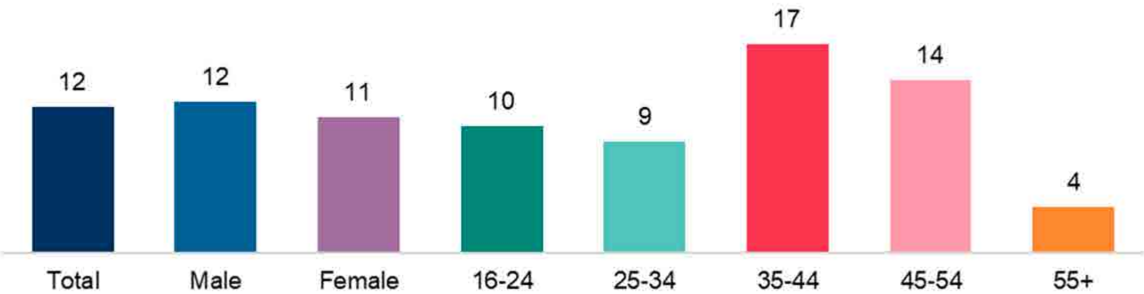
C3. Generally, how often do you purchase physical TV programmes/series?





Base: n=186 (purchased physical copies of TV programmes in the past 3 months)

C4. In the past 3 months how many physical TV programmes/series did you purchase? (Average purchases)



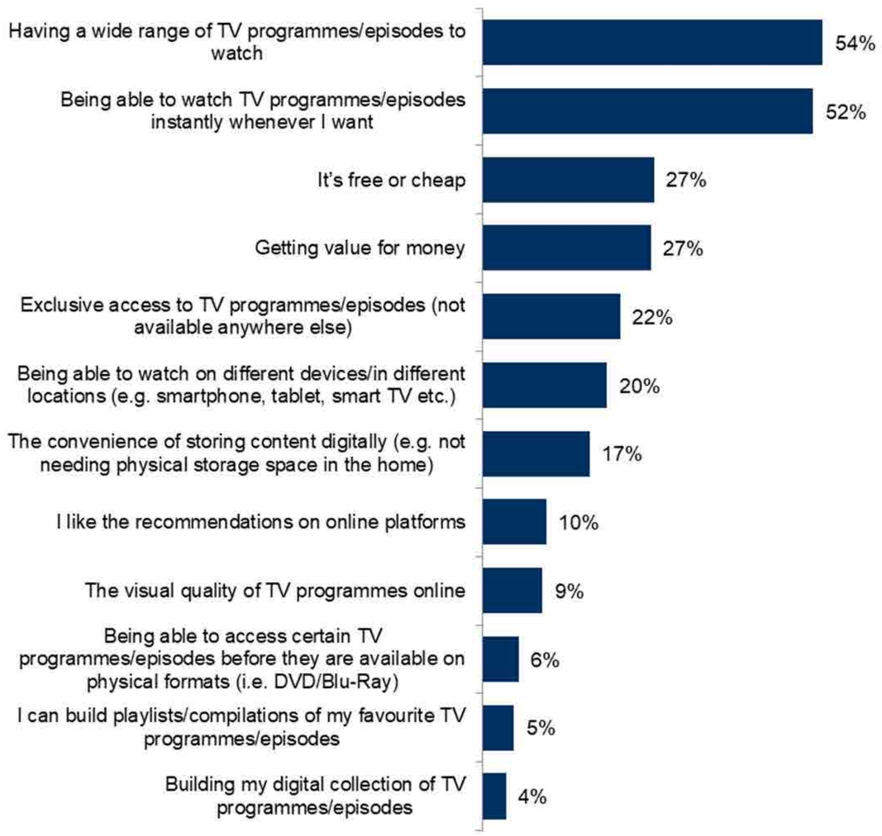
Base: n=177 (purchased physical copies of TV programmes in the past 3 months)

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.

- No single reason was selected by more than half of respondents, suggesting a fairly broad range of motivations. These related to having a **range** of options available ("having a wide range of TV programmes/episodes to watch" 54%) and **ease of access** ("being able to watch TV programmes/episodes instantly whenever I want" 52%).
- The next two most selected factors both related to **price,** with "it's free or cheap" and "getting value for money" both chosen by 27% of respondents.
- Another group of factors, selected by around a fifth of respondents, related to **exclusive access** to content (22%), **portability** in terms of devices and locations (20%) and the **"convenience** of storing content digitally" (17%). No other factor was selected by more than 10% of respondents.

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: n=2,377 (downloaded or streamed TV programmes/series online in the past 3 months)

Male respondents	Female respondents
1. Having a wide range of TV programmes/ episodes to watch (53%) 2. Being able to watch TV programmes/episodes instantly whenever I want (47%) 3. Getting value for money (29%)	1. Being able to watch TV programmes/episodes instantly whenever I want (57%) 2. Having a wide range of TV programmes/ episodes to watch (54%) 3. It's free or cheap (27%)
Aged 12-15	**Aged 16-24**
1. Being able to watch TV programmes/episodes instantly whenever I want (52%) 2. Having a wide range of TV programmes/ episodes to watch (48%) 3. Being able to watch on different devices/in different locations (28%)	1. Having a wide range of TV programmes/ episodes to watch (55%) 2. Being able to watch TV programmes/episodes instantly whenever I want (44%) 3. Getting value for money (31%)
Aged 25-34	**Aged 35-44**
1. Having a wide range of TV programmes/ episodes to watch (52%) 2. Being able to watch TV programmes/episodes instantly whenever I want (47%) 3. Getting value for money (30%)	1. Having a wide range of TV programmes/ episodes to watch (53%) 2. Being able to watch TV programmes/episodes instantly whenever I want (50%) 3. Getting value for money (29%)
Aged 45-54	**Aged 55+**
1. Having a wide range of TV programmes/ episodes to watch (58%) 2. Being able to watch TV programmes/episodes instantly whenever I want (57%) 3. It's free or cheap (28%)	1. Being able to watch TV programmes/episodes instantly whenever I want (59%) 2. Having a wide range of TV programmes/ episodes to watch (54%) 3. It's free or cheap (35%)

Downloading TV programmes/series

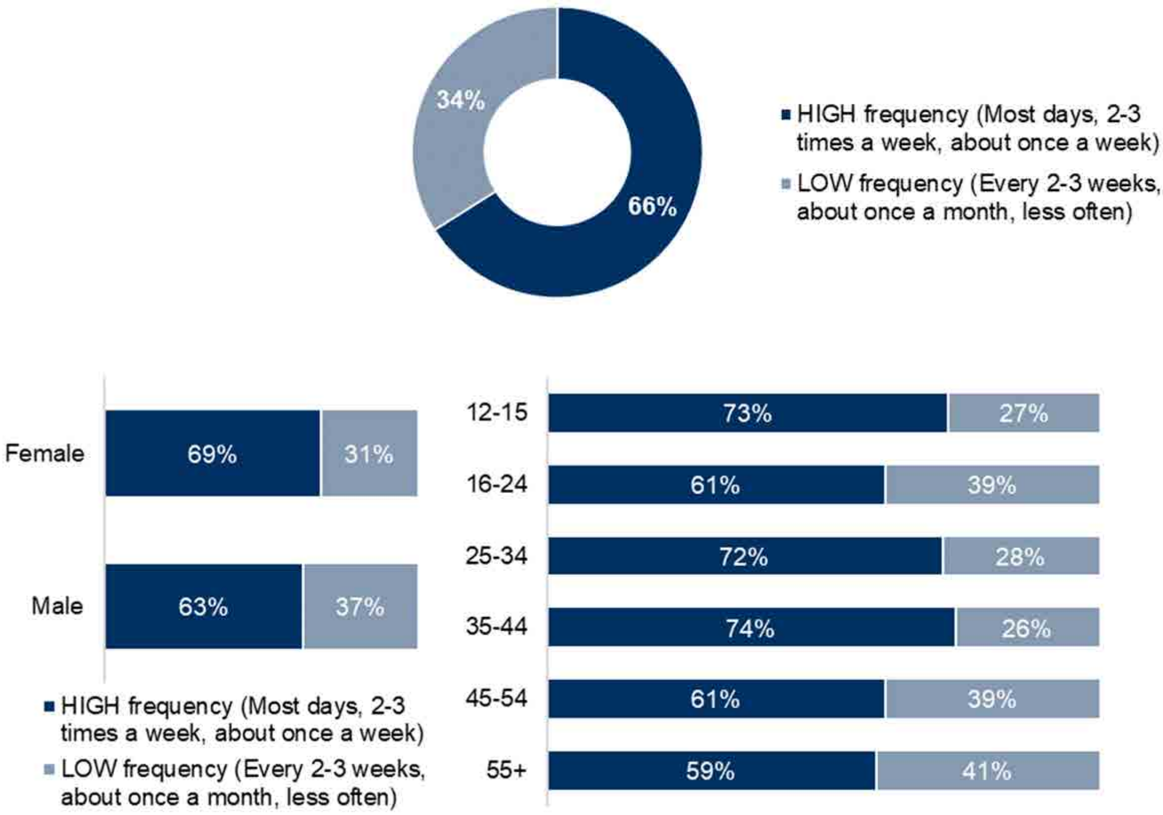
The 18% who had downloaded TV programmes/series during the previous 3 months were asked more questions around frequency, volume and sources used.

Frequency and volume of downloading TV programmes/series

- Two thirds (66%) of those who had downloaded TV programmes/series did so frequently (i.e. at least once a week). This was highest among those aged 12-15 and 25-44 (72-74% downloaded frequently) but was above 50% among all age groups.

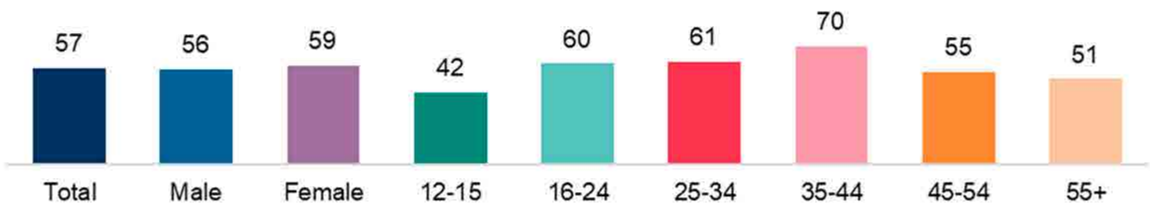
- Over a three-month period respondents downloaded an average of 57 TV programmes/episodes to watch. This was highest in those aged 35-44 which, at 70, was at least 9 programmes/episodes higher than all other age groups.

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



Base: n=901 (downloaded TV programmes/episodes 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)



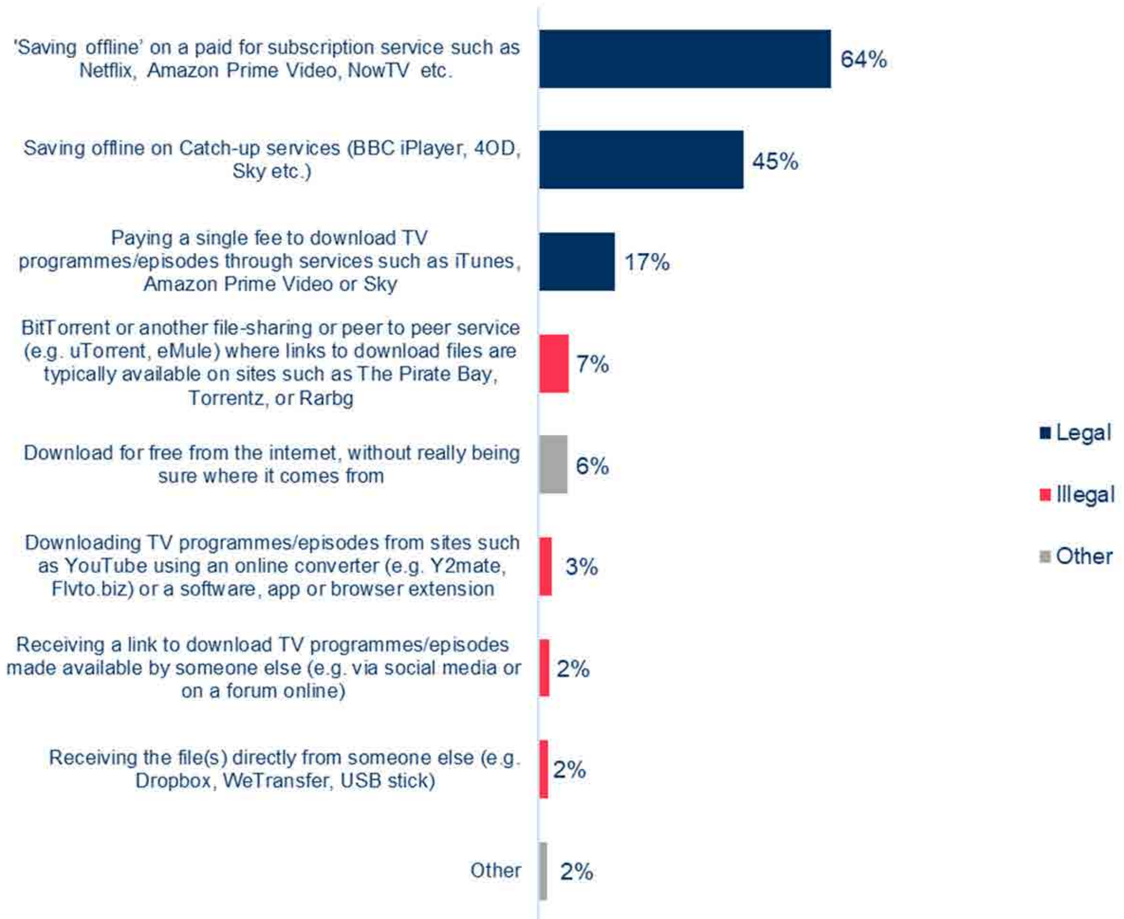
Base: n=891 (downloaded TV programmes/episodes in the past 3 months)

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 top three sources were all legal ones**. The most commonly used, which was also the only one selected by more than half of respondents, was "'saving offline' on a paid subscription service" (64%). This was followed by "saving offline on catch up services" (45%) and "paying a single fee to download TV programmes/episodes" (17%).
- **The most used illegal source was "BitTorrent or another file-sharing or peer to peer service",** which was selected by 7%. This at least twice as high as all other illegal sources which were selected by between 2-3%.
- Use of "BitTorrent or another file-sharing or peer to peer service" was highest in the 16-44 age groups where it ranged from 9-12%. This was about twice as much as it was in younger and older age groups where it was used by between 3-5% of each.

C8. Which of the following have you used to download TV programmes/episodes in the past 3 months? Please select all that apply. (%)



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
'Saving offline' via a paid for subscription service such as Netflix, Amazon Prime Video, NowTV etc.	62%	65%	69%	77%	69%	66%	65%	69%
Saving offline on Catch-up services (BBC iPlayer, 4OD, Sky etc.)	41%	49%	33%	40%	26%	44%	44%	66%
Paying a single fee to download TV programmes/episodes through services such as iTunes, Amazon Prime Video or Sky	18%	15%	26%	20%	19%	17%	17%	10%
BitTorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay	9%	3%	3%	9%	9%	12%	5%	2%
Download for free from the internet, without really being sure where it comes from	8%	5%	10%	3%	6%	6%	8%	7%
Downloading TV programmes/ episodes from sites such as YouTube using an online converter (e.g. Y2mate, Flvto. biz) or a software, app or browser extension	7%	5%	7%	8%	7%	7%	3%	6%
Receiving a link to download TV programmes/episodes made available by someone else (e.g. via social media or on a forum online)	3%	2%	3%	3%	2%	5%	1%	2%
Receiving the file(s) directly from someone else (e.g. Dropbox, WeTransfer, USB stick)	2%	2%	4%	2%	2%	3%	4%	0%

Base: n=901 (downloaded TV programmes/episodes in the past 3 months)

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

Those unsure of the source of their downloads were asked to explain more in their own words about how they obtained them.

Using a search engine such as Google to find a download link for a TV programme/series was the most common means of downloading TV programmes/series from unknown sources. Most of those who tended to use this method clicked through the search results until they found a functioning download link for the programme/series they wanted to watch.

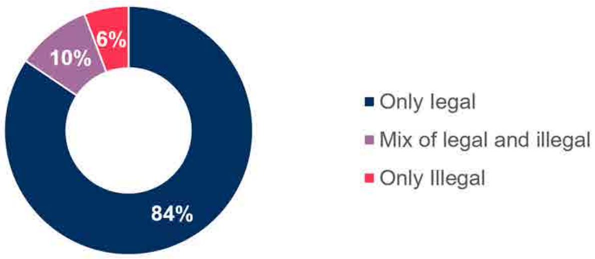
Multiple respondents also mentioned that they did not know how to download TV programmes/series themselves, so they asked a friend or family member to download it for them.

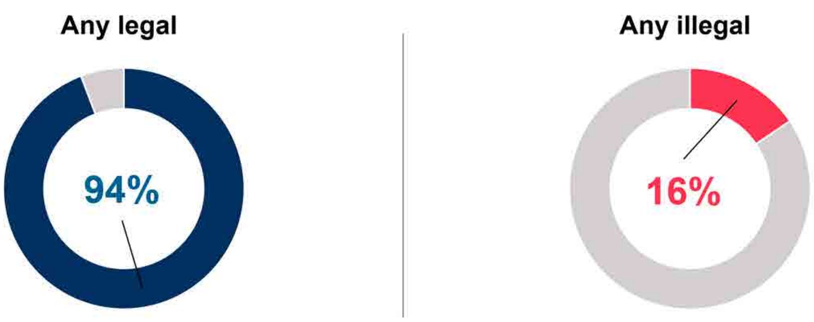
Legality of TV programmes/series downloads

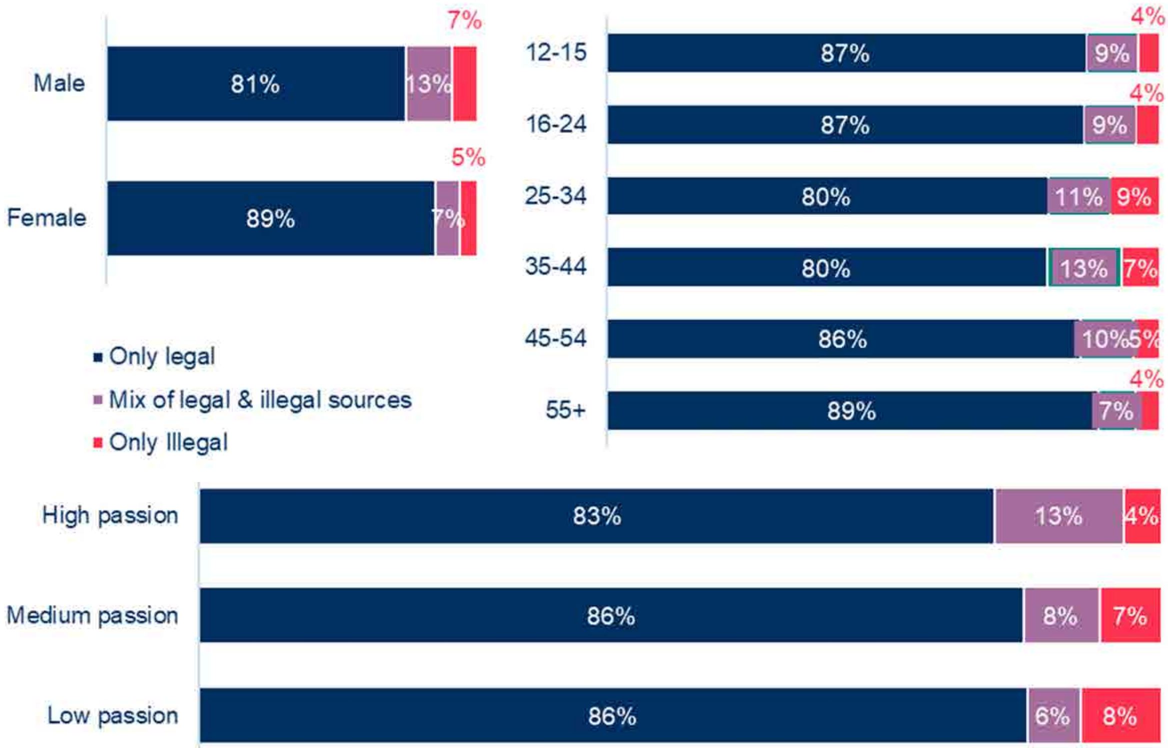
To better understand the distribution of sources across legal and illegal categories, those who had downloaded TV programmes/series in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

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

- Legal:
  - 94% had used a legal source to download TV programmes/series.
  - 84% had used legal sources only to download TV programmes/series.
- Illegal:
  - 16% had used an illegal source to download TV programmes/series.
  - 6% had used illegal sources only to download TV programmes/series.
  - Illegal sources accounted for 9% of all TV downloads.
  - Use of illegal sources was highest in those aged 25-34 and 35-44, where it was 20% for each. This was higher than in younger and older age groups where it ranged between 11-15%.
- Mixed:
  - 10% had used a mix of legal and illegal sources to download TV programmes/series.
  - Use of a mix of sources was highest among those with a ‘high’ passion for TV at 13% (5% higher than those with a ‘medium’ level and 8% higher than those with a ‘low’ level).







Base: n=862 (downloaded TV programmes/series in the past 3 months, with those who selected 'other' or 'not sure of source' removed).

C9. And how is the way you download TV programmes/series typically split across the following sources? (average % of their time and average number of downloads)

Legality	Source	Average % of usage split
Legal	"Saving offline" on a paid for subscription service such as Netflix, Amazon Prime Video, NowTV etc.	49%
	Saving offline on Catch-up services (BBC iPlayer, 4OD, Sky etc.)	28%
	Paying a single fee to download TV programmes/episodes through services such as iTunes, Amazon Prime Video or Sky	8%
Illegal	A file hosting website or cyberlocker	1%
	BitTorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay	4%
	Downloading TV programmes/episodes from sites such as YouTube using an online converter (e.g. Y2mate, Flvto.biz) or a software, app or browser extension	3%
	Receiving the file(s) directly from someone else for free	1%
	Receiving a link to download TV programmes/series made available by someone else	1%
Other	Download for free from the internet, without really being sure where it comes from	4%
	Other	2%

Base: n=901 (downloaded TV programmes/series in the past 3 months)

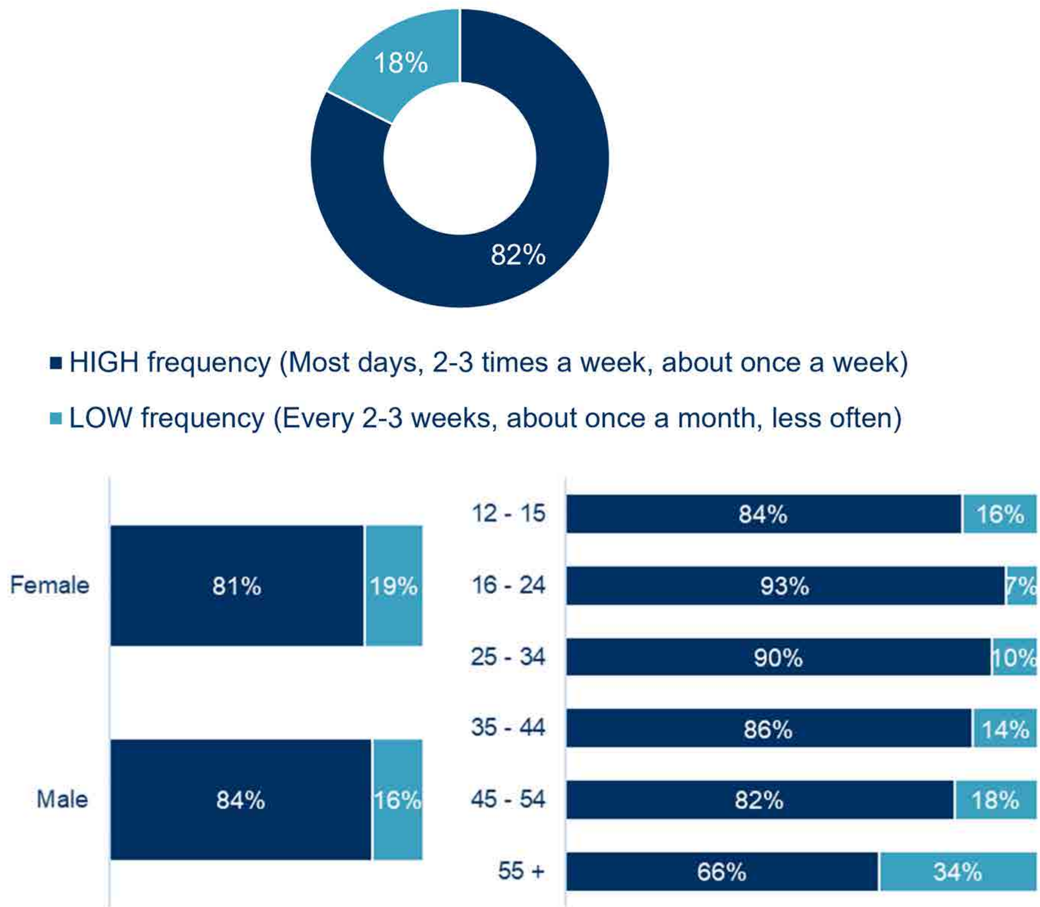
Streaming TV programmes/series

The 44% who had streamed TV programmes/series online during the previous 3 months were asked questions around frequency, volume and sources used.

Frequency and volume of streaming TV programmes/series

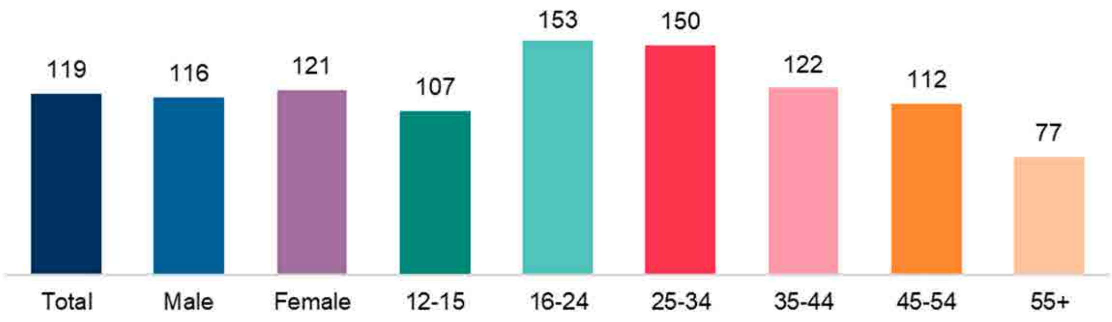
- **Eight in ten (82%) were frequent streamers of TV programmes/series,** doing so weekly.
- Frequency of streaming was generally consistent among those aged **12-54,** and then dropped slightly for those aged 55+.
- Respondents spent an average of 119 hours streaming TV programmes/episodes over a three month period. This was highest in those aged 16-24 (153 hours) and 25-34 (150 hours). All other younger and older age groups watched between 102-122 hours apart from those aged 55+ where it fell to 77 hours.

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



Base: n=2,179 (streamed TV programmes/series in the past 3 months)

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



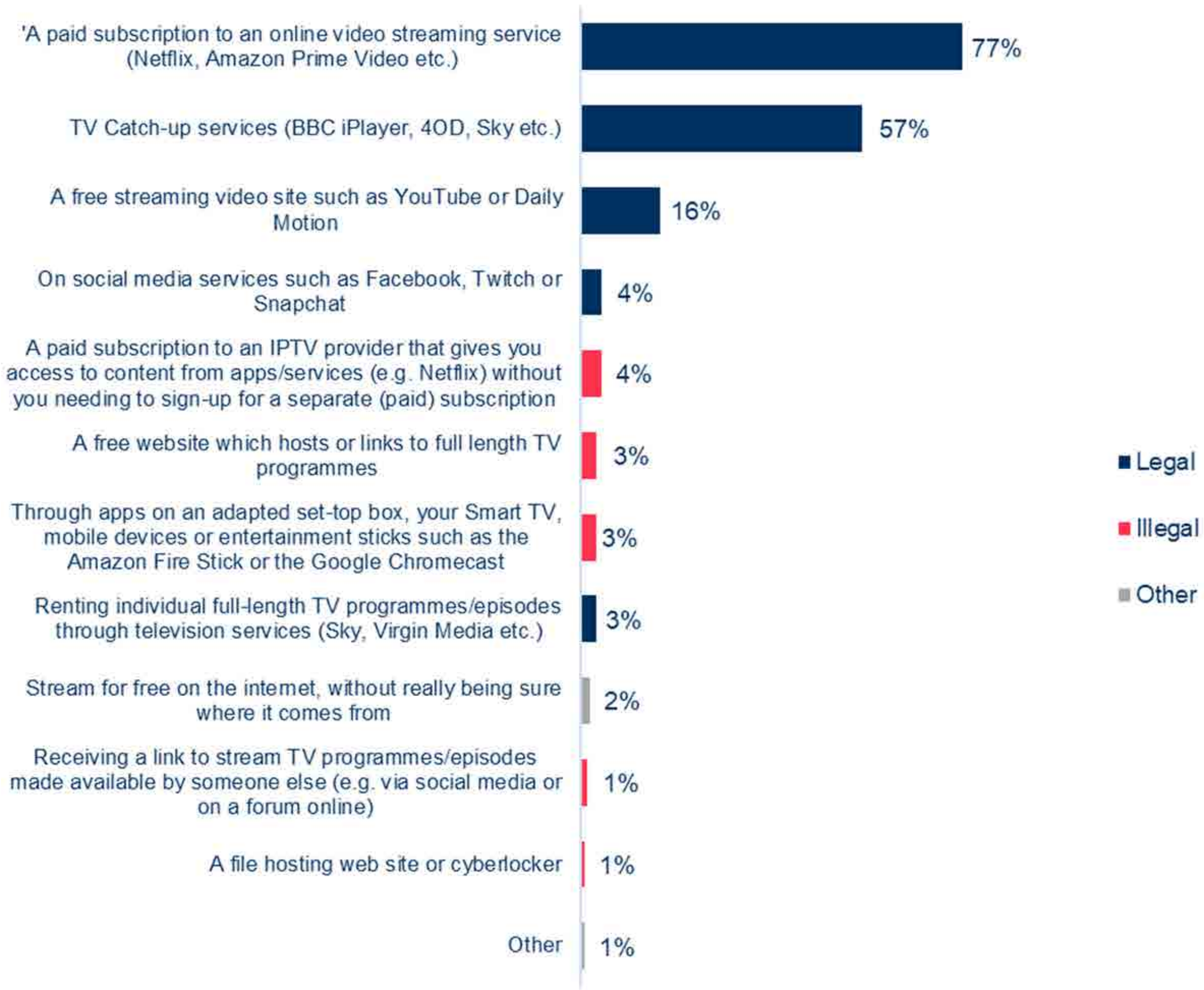
Base: n=2,159 (streamed TV programmes/series in the past 3 months)

Sources of TV programme/series streaming

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

- **Legal sources were the most used.** Furthermore, the top option by some way was a paid source, with 77% using a **"paid subscription to an online video streaming service".** This was followed by "TV Catch-up services", which were used by over half (57%), with "a free streaming video site such as YouTube" in a distant third place (16%).
- Other legal sources (e.g. social media services, renting programme/episodes) were used by a small minority of respondents (3-4%).
- **No illegal source was used by more than 4% of respondents.**

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



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
A paid subscription to an online video streaming service (Netflix, Amazon Prime Video etc.)	77%	78%	86%	87%	85%	83%	80%	57%
A paid subscription to an IPTV provider that gives you access to content from apps/services (e.g. Netflix) without you needing to sign-up for a separate (paid) subscription	5%	4%	8%	5%	4%	6%	3%	3%
On social media services such as Facebook, Twitch or Snapchat	5%	4%	8%	8%	5%	5%	2%	2%
A free streaming video site such as YouTube or Daily Motion	19%	14%	14%	21%	17%	15%	13%	17%
A file hosting web site or cyberlocker	1%	1%	1%	1%	2%	1%	1%	0%

	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
TV Catch-up services (BBC iPlayer, 4OD, Sky etc.)	54%	61%	38%	46%	46%	56%	60%	77%
Renting individual full-length TV programmes/episodes through television services (Sky, Virgin Media etc.)	3%	3%	4%	4%	3%	4%	4%	2%
A free website which hosts or links to full length TV programmes	4%	3%	1%	5%	4%	3%	4%	2%
Through apps on an adapted set-top box, your Smart TV, mobile devices or entertainment sticks such as the Amazon Fire Stick or the Google Chromecast	3%	3%	3%	2%	4%	3%	4%	3%
Receiving a link to stream TV programmes/episodes made available by someone else (e.g. via social media or on a forum online)	2%	1%	2%	1%	1%	2%	1%	1%
Stream for free on the internet, without really being sure where it comes from	3%	1%	1%	3%	2%	2%	2%	2%
Other	1%	1%	1%	0%	0%	1%	1%	2%

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

Base: n=2,179 (streamed TV programmes/series in the past 3 months from the listed sources)

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

Those unsure of the source of their streaming were asked to explain more in their own words about how they obtained them.

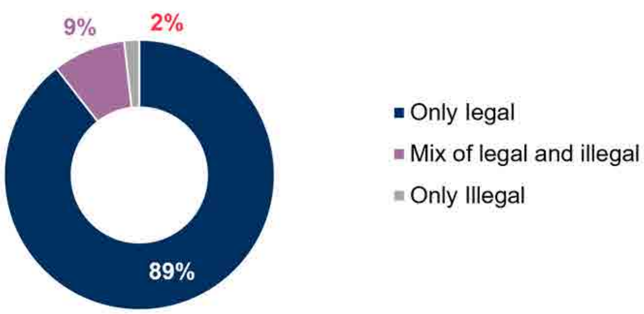
As with downloading TV programmes/series, most of those who streamed via an unknown source used a search engine to find a website hosting a particular programme/series. Though some of these respondents frequently ended up streaming on the same websites (Putlocker, 123movies), they tended to reach the website through a search engine each time they streamed a TV programme/series rather than by directly visiting the website.

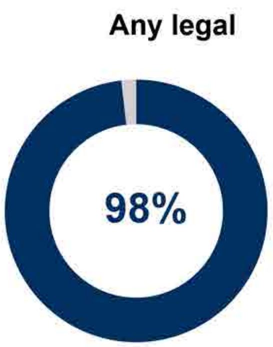
Legality of TV programmes/series streaming

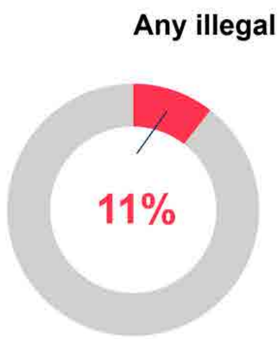
To better understand the distribution of sources across legal and illegal categories, those who had streamed TV programmes/series in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only; illegal sources only; or a mix of the two.

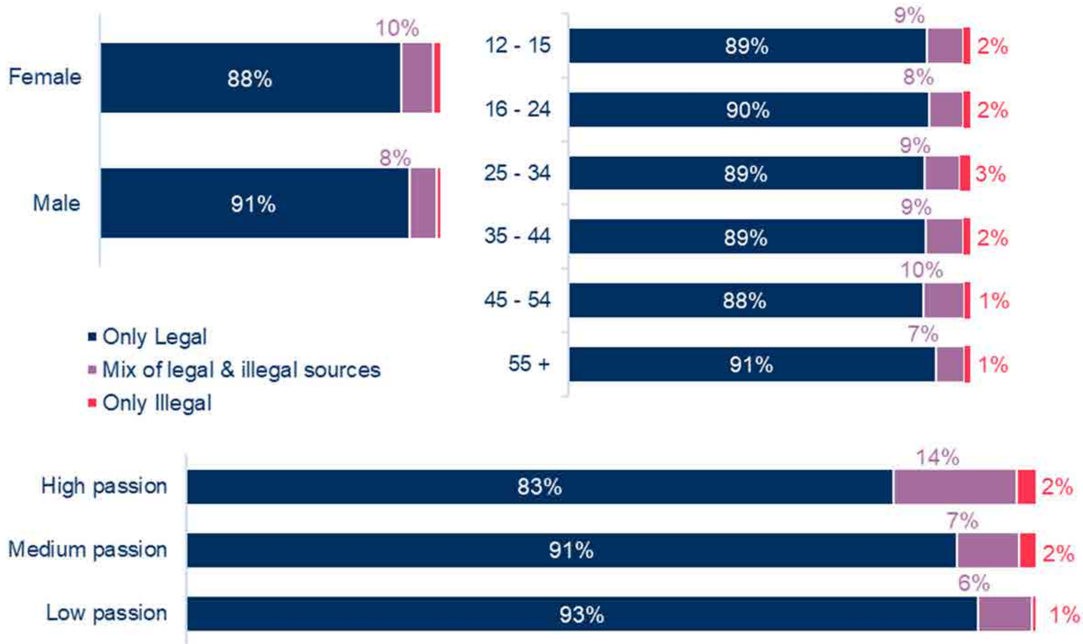
The answer option "Stream for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they only consumed content this way was not included in the base.

- Legal:
    - Almost all (98%) had used at least one legal source to stream TV programmes/series.
    - 89% had used legal sources only to stream TV programmes/series.
- Illegal:
    - 11% had used at least one illegal source to stream TV programmes/series.
    - 2% had used illegal sources only to stream TV programmes/series.
    - Illegal sources accounted for 5% of all time spent streaming.
- Mixed:
    - 9% had used a mix of legal and illegal sources to stream TV programmes/ series.









Base: n=2,162 (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 TV programme/series streaming time typically split across the following sources?

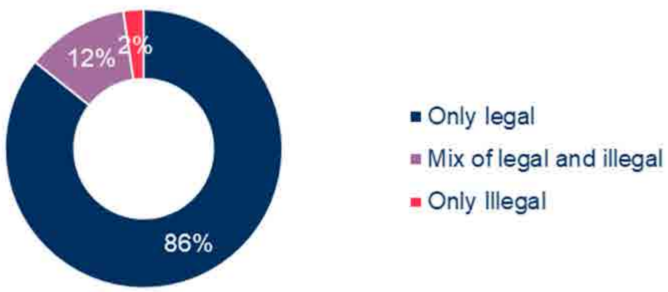
Legality	Source	Average % of usage split
Legal	A paid subscription to an online video streaming service (Netflix, Amazon Prime Video etc.)	57%
	TV Catch-up services (BBC iPlayer, 4OD, Sky etc.)	29%
	A free streaming video site such as YouTube or Daily Motion	6%
	A paid subscription to an IPTV provider (Insight IPTV, Gears TV etc.) that gives you access to content from apps/services (e.g. Netflix) without you needing to sign-up for a separate (paid) subscription	2%
	On social media services such as Facebook,Twitch or Snapchat	1%
	Renting individual full-length TV programmes/episodes through television services (Sky, Virgin Media etc.)	1%
	Through apps such as Kodi or Showbox on an adapted set-top box, your Smart TV, mobile devices or entertainment sticks such as the Amazon Fire Stick or the Google Chromecast	1%
Illegal	A free website which hosts or links to full length TV programmes (WatchFree, Watch Series etc.)	1%
	Receiving a link to stream TV programmes/episodes made available by someone else (e.g. via social media or on a forum online)	0%
	A file hosting web site or cyberlocker (MediaFire, Rapidgator etc.)	0%
Other	Stream for free on the internet, without really being sure where it comes from.	1%
	Other	1%

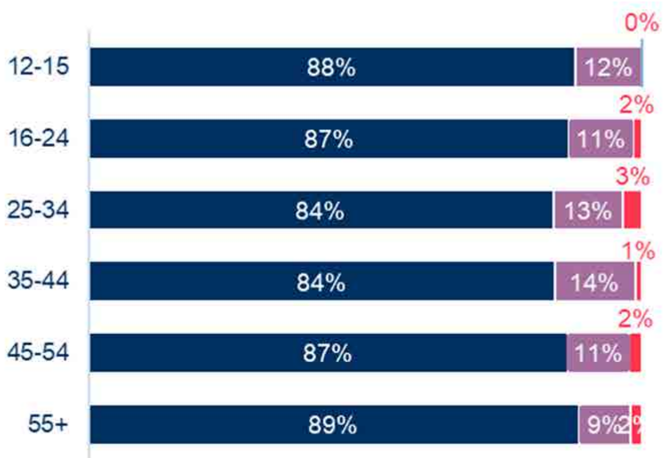
Base: n=2,179 (streamed TV programmes/series in the past 3 months)

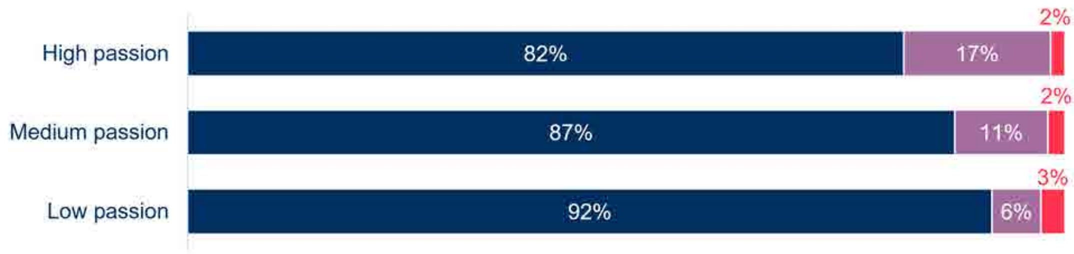
Combined downloading and streaming of TV programmes/series

The use of legal and illegal sources for TV programme/series 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:
  - **86%** indicated that they use legal sources only.
- Illegal:
  - **2%** used illegal sources only.
- Mixed:
  - **12%** used a mix of legal and illegal sources.
  - Using a mix of legal and illegal sources was highest among those with a 'high' passion for TV (it was 6% higher than those with a 'medium' passion and 11% higher than those with a 'low' passion).







Base: n=2,349 (those who have streamed and/or downloaded TV Programmes/Series from a legal or illegal source with those who only selected 'not sure of source' counting as illegal)

Qualitative insight

In terms of streaming TV content, most participants in the Online Community had access to official streaming sites such as Netflix, Amazon Prime, Now TV etc. However, access via streaming was not always legal. Some of the sample paid for these services themselves while some used the logins of relatives or friends to gain access.

In regard to downloading TV content, participants used various unofficial sources, with the greatest benefit being the ability to store files on their hardware and accessing new content for free without having to take up a subscription to a whole new platform. The most frequently mentioned sources for downloads in the qualitative phase were file hosting websites such as BitTorrent and Pirate Bay as well as converted files downloaded from YouTube.

Due to the government imposed lockdowns during 2020-21, a few reported that sources of free content had been particularly important to them this year because of the lack of new TV content being produced. Access to free, unofficial sources meant they were able to search beyond the catalogue of their subscriptions for fresh content that they hadn't seen before, at no extra cost.

As seen in previous years, the division of TV content across multiple platforms appeared to contribute to illegal access because participants felt restricted in what they were able to watch. Even those who paid for multiple streaming services said they still had to use unofficial sources sometimes in order to access all the content they wanted.

- *"The benefits of using these formats is that I get to watch the shows I want to see without having to spend more money on subscription channels that I'll mostly never use. It also means I get to watch shows that are shown in the US without having to wait a year for them to come to UK channels, if they do at all."* - Female, 35-44

- *"Netflix has been my main source. This is because I get recommendations and new pop ups from Netflix unlike free online downloads. I only use other methods when my paid subscription expires or when there's something that catches my attention which is not on Netflix."* - Female, 25-34

- *"My main go to option when it comes to watching TV content is my fire stick with an add on called Cinema HD. The reason for this is due to the amount of free to watch TV content available and the app is always updating so you never run out of things to watch."* - Male, 45-54

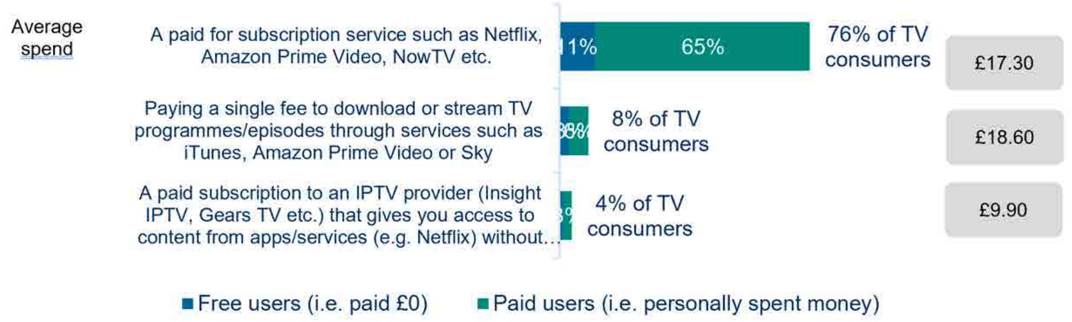
- *"I use BitTorrent to download TV shows, especially shows that are not available in the UK, at least not on the streaming platforms that I pay for (Netflix and Amazon Prime). I've been using BitTorrent for many years but the usage has dropped considerably since getting Netflix and Prime. However with the increase in streaming platforms, Disney, Hulu, Apple etc., there is more and more which is unavailable to me. The fragmentation of streaming providers concerns me."* - Male, 45-54

Paying for TV programmes/series

Those who had used a paid source to either download or stream TV programmes/episodes were asked how much they had personally spent on each source in a month.

- Most TV consumers had used “a paid for subscription service” (76%) and the majority (65% of TV consumers) had personally made a contribution towards this, with a smaller amount (11%) not doing so. They spent an average of £17.30 a month.
- A smaller amount of TV consumers either paid “a single fee to download or stream TV programmes/episodes” (8% of TV consumers) or used “a paid subscription to an IPTV provider” (4% of TV consumers). They spent an average of £18.60 and £9.90 respectively.

C14. Approximately how much do you personally spend each month on the below sources of streaming or downloading TV programmes/series? (Proportion of TV consumers over past three months using a paid source and average amount spent each month by users of that source)



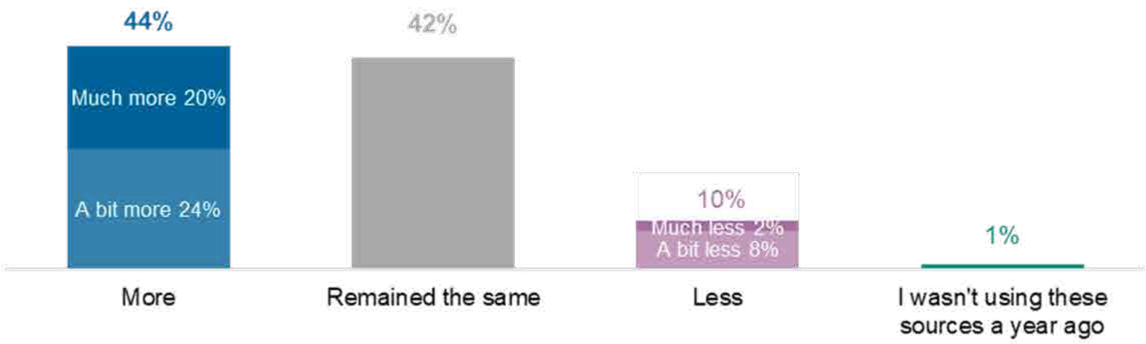
Base: n=2,349 (streamed and/or downloaded TV programmes/series), n=23-1,847 (those who used each of the sources to stream/download TV programmes/series)

Change in use of illegal sources

Those who had used an illegal source to download or stream TV programmes/series were asked how the use of these sources compares to the same point a year ago.

- Respondents were fairly evenly split between those whose usage had increased (44%) and those whose had remained the same (42%). A relatively small number said their usage had decreased (10%) or that they weren't using these sources a year ago (1%).

C15. You said you download or stream TV programmes/series using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=316 (downloaded and/or streamed TV programmes/series illegally)

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

Those who had **increased** their usage of illegal sources in the last year frequently cited COVID-19 as a major factor. Many of these respondents turned to TV programmes/series to help fill the increased time they had to spend at home. Their increase in usage of illegal sources was accompanied by an overall increase in their consumption of TV programmes/series.

- *"I have more time now to watch them due to lockdown and have found some really good series to watch. I can also download all previous episodes and series and watch them from the very beginning."* - Male, 45-54
- *"Lockdown here in the UK has encouraged me to be more resourceful seeking entertainment. Speaking to people on social platforms helps to get new links or sources."* - Female, 35-44
- *"I started using the sources more because I have more time at home and am available to sit and watch TV."* - Male, 25-34

Most of those who had used illegal sources **less** in the last year mentioned a preference for paid streaming services such as Netflix. Some of them found that streaming services had more content than in previous years and did not feel the need to use illegal sources to find appealing TV programmes/series. Others had purchased a subscription to a streaming service in the last year and did not feel the need to turn to illegal sources as often.

- *"More content being available on platforms such as iPlayer, BritBox, Netflix."* - Male 25-34
- *"It's become harder to find shows that are online and easy to get in the last year."* - Male, 16-24
- *"Watching more shows on subscription services."* - Male, 16-24
- *"I bought Netflix, and now mostly watch shows on it."* - Female, 16-24

Few respondents had **started using illegal sources** to watch TV programmes/series in the last year. For this small group, the most commonly mentioned reason for turning to illegal sources was to watch specific content, such as international or foreign language TV programmes/series.

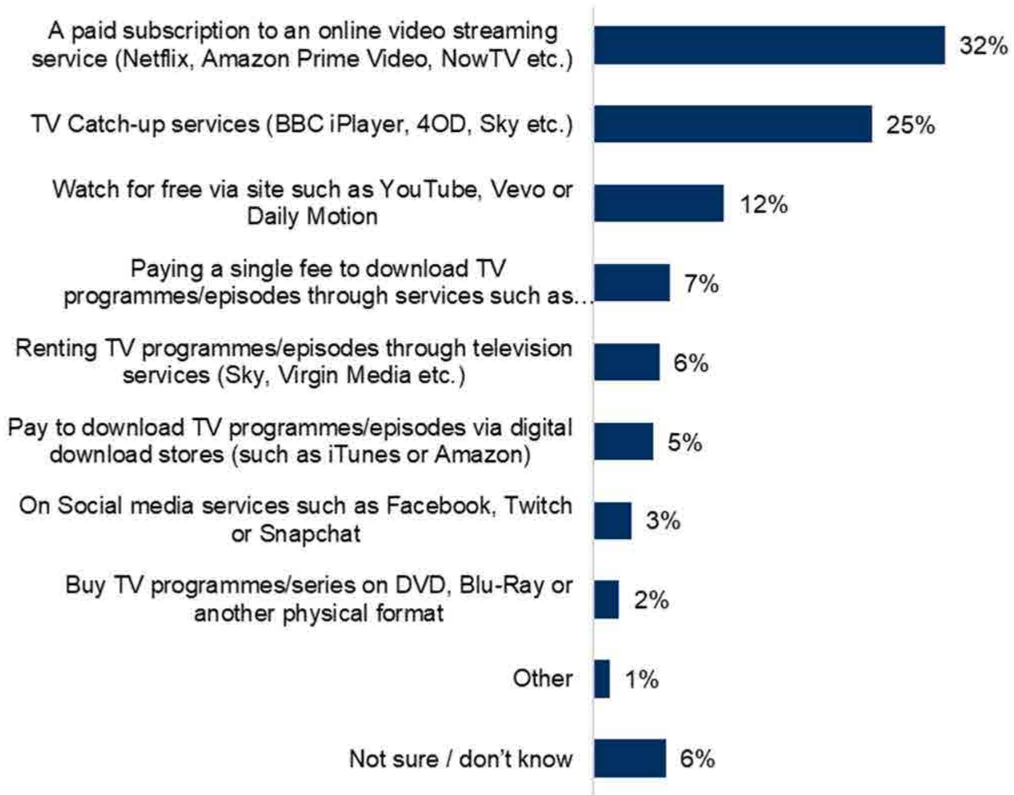
- *"To watch foreign language TV-shows."* - Female, 55+
- *"View content from outside of my own country."* - Male, 25-34

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 (32%) 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 25%, followed by free video sites such as YouTube at 12%.
- No other single source was selected by more than 7%.

C16. If TV programmes/series 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 +
A paid subscription to an online video streaming service (Netflix, Amazon Prime Video, NowTV etc.)	28%	37%	36%	40%	32%	35%	35%	18%
TV Catch-up services (BBC iPlayer, 4OD, Sky etc.)	26%	23%	27%	13%	26%	14%	25%	43%
Watch for free via site such as YouTube, Vevo or Daily Motion	10%	15%	5%	10%	6%	15%	15%	15%
Paying a single fee to download TV programmes/episodes through services such as iTunes, Amazon Prime Video or Sky	7%	7%	9%	10%	7%	11%	4%	3%
Renting TV programmes/ episodes through television services (Sky, Virgin Media etc.)	6%	6%	0%	10%	2%	8%	5%	9%
Pay to download TV programmes/episodes via digital download stores (such as iTunes or Amazon)	8%	1%	13%	10%	9%	1%	4%	1%
On Social media services such as Facebook, Twitch or Snapchat	3%	4%	5%	5%	6%	5%	0%	0%
Buy TV programmes/series on DVD, Blu-Ray or another physical format	2%	2%	5%	0%	5%	2%	0%	3%
Not sure / don't know	7%	5%	0%	3%	7%	9%	7%	6%

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

Base: n=316 (downloaded and/or streamed TV programmes/series illegally)

Qualitative insight

Reactions to the prospect of losing access to free, unofficial sources of TV content were relatively measured. Most participants felt it would be an annoyance but something they could deal with, even if it would likely reduce their overall consumption slightly. However, a few felt that restricting access to free content was unfair because they believed it was unreasonable to expect them to pay for more streaming services to access all the content they wanted. These participants begrudgingly said they would make up for the gap in content with terrestrial TV and catch-up services.

In order to better understand the nuances of the division of TV content across different platforms, the concept of having one platform which hosted all TV content (like a Spotify within the music industry) was put to participants as a projective technique. Response to this was very positive. The average price participants said they would be prepared to pay per month for such a service would be between £20-£30 - a higher price than most currently paid for TV content (and some were willing to pay even higher than this). This was because participants felt it would reduce the hassle of having different content across different platforms, offer them a wider range of content and provide better value for money. Therefore, it was seen as a very worthwhile proposition.

- *“I do pay for TV and also use free official streaming methods (iPlayer, All4 etc). However, some content that I want to watch is not available on these platforms. I would resent having to pay for more streaming services to watch what I want to. The monthly cost would be far too high. If there was a one stop shop, or licencing arrangements where Netflix for example could show Disney+ content, then it would not be too much of a hassle.”* - Male, 45-54

- *“I have a subscription to Netflix, Amazon Prime and recently Now TV. I would prefer to have 1 streaming site I could use for everything rather than 3 separate subscriptions. If I could have all 3 for about £30 it would be easier to manage.”* - Female, 35-44

- *“If there was one subscription that had all of the subscriptions in one bundle I would love that idea and would sign up for that service. Having one bill instead of multiple would be beneficial - I would be willing to pay upwards of £40 a month.”* - Male, 25-34

- *“I have Amazon Prime Video, Apple TV, Sky, Netflix and Disney+ Subscriptions. I get irritated that series are often incomplete on sites or presented inconsistently. For example, some Twilight videos were free on Amazon but the latest ones required an additional fee, but accessing them on Netflix was free. It irritates me that I need to pay a one off additional fee on one site when I could get it for free on another. I would love all content in a dedicated service and would happily pay £30. I would pay additionally for any sports or movies included in such a service.”* - Male, 25-34

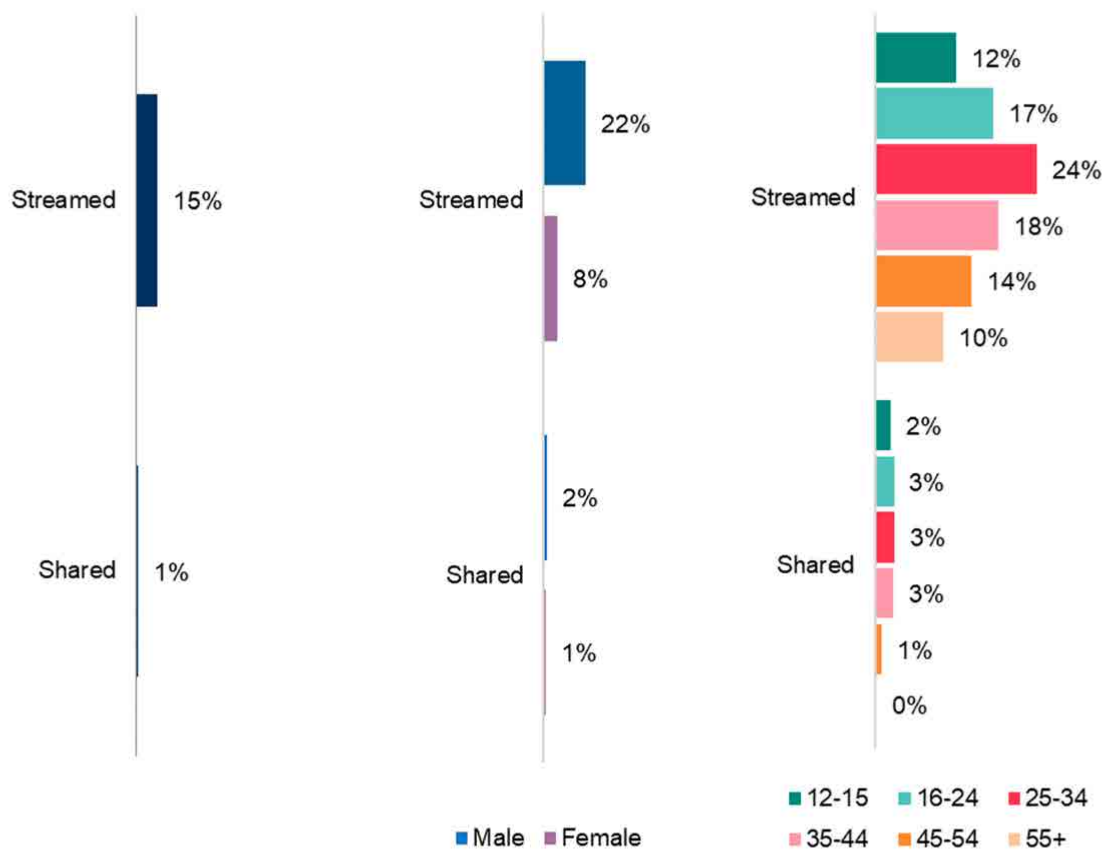
Live Sports Events

Engaging with live sports events

15% had engaged with live sports in the previous 3 months (i.e. either by streaming or sharing).

- Overall, 15% had streamed live sports in the previous 3 months.
- Streaming live sports was notably higher among men (22%) than women (8%). It was highest in those aged 25-34 (24%) with it decreasing among younger and older age groups.

D1. Have you streamed/shared[1] live sports events in the past 3 months?



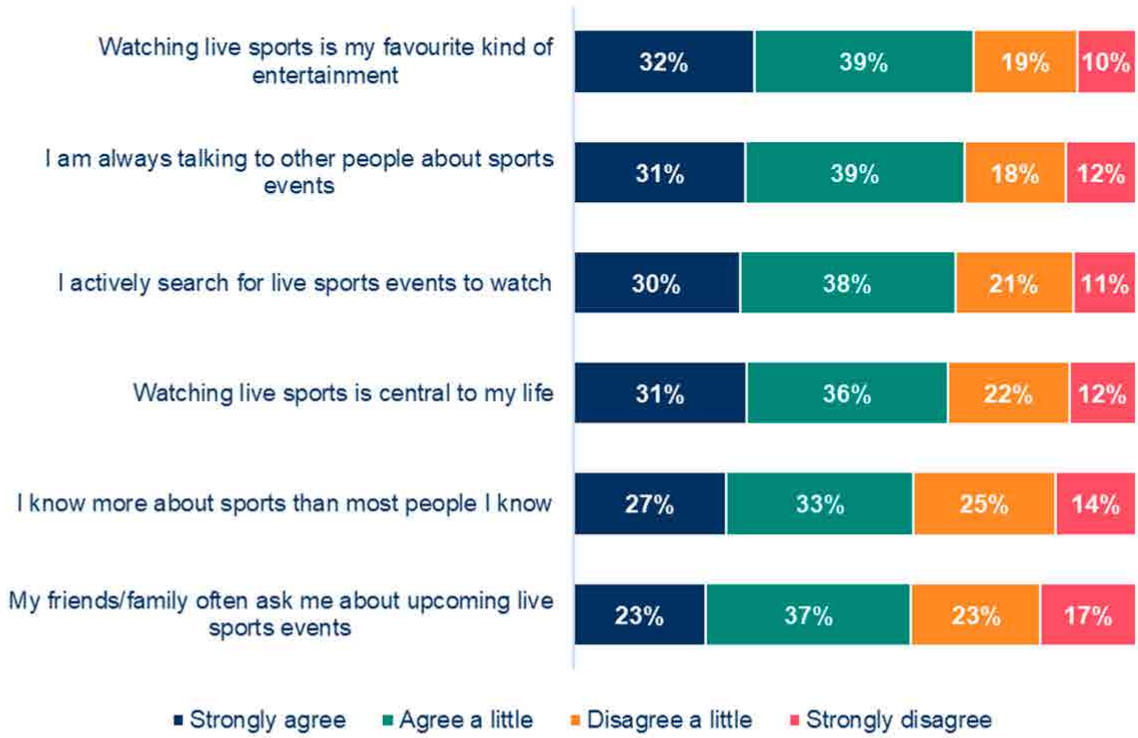
Base: n=5,000 (total sample)

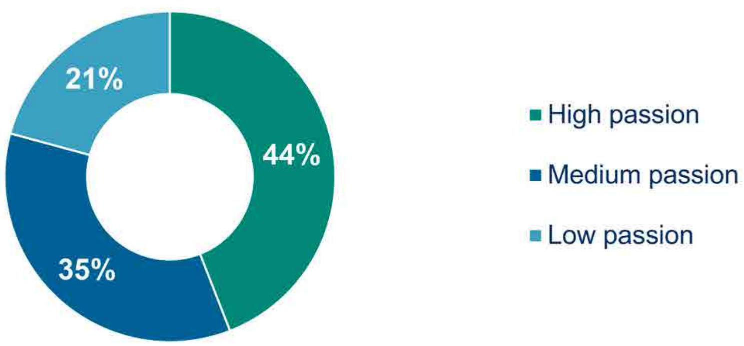
To get a broader sense of **their passion for live sport,** respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their answers.

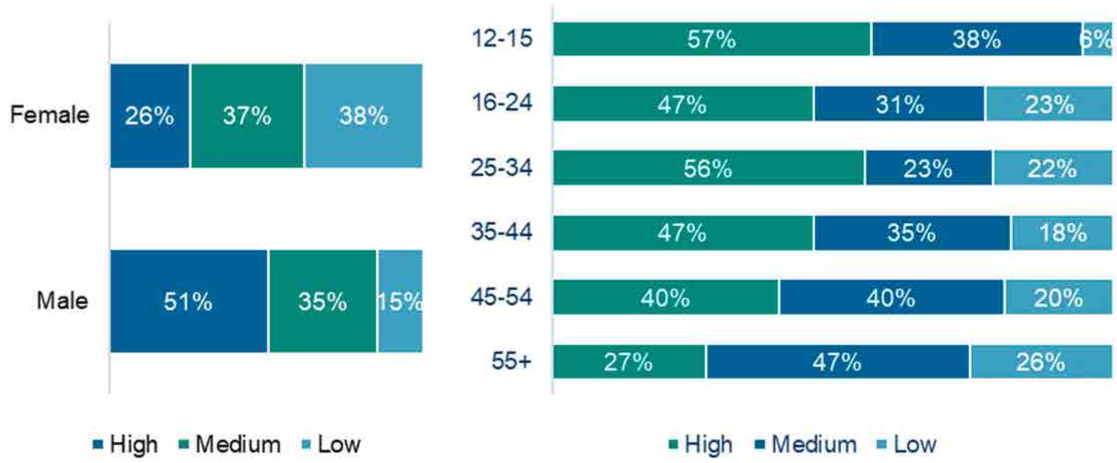
1 The definition of 'shared' was provided as: "By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated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

- **Just under half** (44%) displayed **high levels of passion for live sports.** This was most apparent among those aged 12-15 (57%) and 25-34 (56%) whose high passion levels were at least 10% higher than any other age group.
- While scores across all individual statements relating to sport were relatively high, the passion for live sports is perhaps most evident in the fact that "watching live sports is my **favourite** kind of entertainment" (71%) was the most selected statement. It was also closely followed by those who said that they are "always talking to other people about sports events (69%).

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







Base: n=734 (streamed and/or shared live sports events in the past 3 months)

Qualitative insight

Despite the fact that the availability of live sports had been inconsistent throughout the past year due to social restrictions and lockdowns, many participants had been accessing live sports content regularly. Some were accessing live sports 5-6 times a week in recent months. This was due to some having had more time than usual to dedicate to watching sports through no longer commuting or working as a result of the pandemic but also because some participants found a renewed appreciation for live sports during lockdown. Some participants said they wanted to support their teams as best they could during challenging times and others felt that live sports offered them a distraction and a sense of normality during a year which had otherwise brought big changes to people's lives.

The appeal of watching live sports meant that while many sports were suspended in the UK, some participants looked to foreign leagues which were still active in order to watch sports, such as football, to fill the void. However, there was also a small cohort in the Online Community who felt that live sports had become less engaging due to the lack of crowds and subsequent lack of atmosphere. This meant that, for some, consumption had decreased at the same time that others were searching for supplementary content from abroad.

Going forward, some felt they would be watching more and more content as things opened up and more sporting events were permitted again, including large international events, such as the European Championships in football or the Olympics. For some, therefore, there was the sense that the world of live sports was only going to get more exciting and dynamic over the coming months which they didn't want to miss. Others said that the loosening of restrictions meant they would be busier with social or other activities and that their consumption of and reliance on live sports would decrease.

- *"Originally at the start I was watching live sports maybe twice a week but as other countries and the UK were opening up that led to 4/5 times per week. Live sports I would say were 9/10 for me in terms of importance during the lockdown. If there was no live sport the lockdown would have been so much tougher to get through. Moving forward it's just a matter of how much time I have as I still want to watch sports but also want to be out and about. I do not feel as attached to live sports as I did during lockdown purely because of the many more options I have in my spare time now."* - Male, 55+

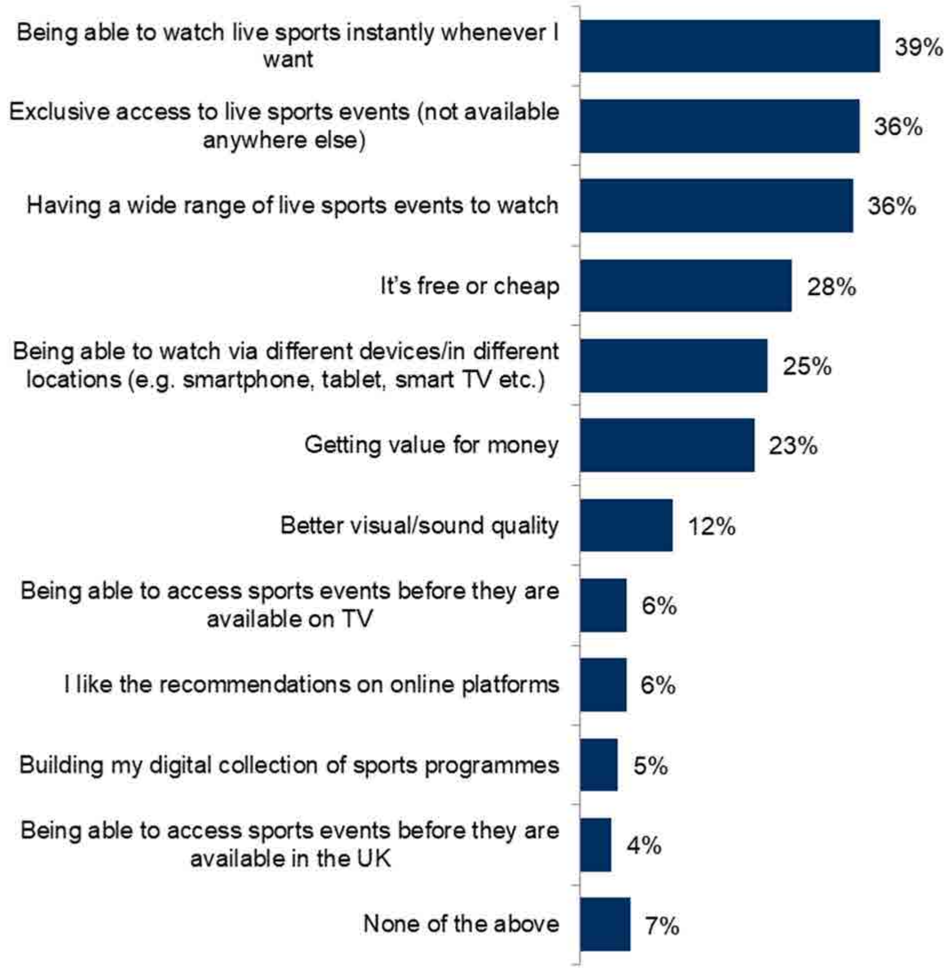
- *"I found myself accessing live football matches 100% more in the last 8 or 9 months than ever before. Although I have been a fan all my life, I would usually watch the game later on in the evening or on match of the day. Covid made me re-evaluate things and I decided that when football came back, I would support my teams properly i.e. watching the games live as best I can. I had almost forgotten how exciting 90 minutes escape can be. So, I am 100% more attached to live football than ever before. Going forward, I will definitely access the matches as much as I am now, particularly now that fans are being allowed back. It will be interesting to see how it affects the players."* - Male, 35-44
- *"During the past year of lockdowns, I accessed live sports a couple of times a week. During the start of lockdown it would have been less than that as most live sport was cancelled. I didn't feel overly reliant on live sports during the past year of lockdowns as many games were cancelled or moved around and the atmosphere during games just wasn't as good as it used to be. I think now that restrictions are lifting bit by bit I will probably start accessing live sports more often again as games are becoming more regular and the Euros are starting soon!"* - Female, 25-34

Understanding online consumption of live sports events

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.

- No single reason was selected by more than half of respondents indicating that a broad range of factors were important.
- The **ease of access, exclusive access** and **the range of selection** were key factors selected by around four in ten respondents. These related to "being able to watch live sports instantly whenever I want" (39%), "exclusive access to live sport events (not available anywhere else)" (36%) and "having a wide range of live sports events to watch" (36%).
- The next most dominant themes related to **cost/price** ("It's free or cheap" 28% and "getting value for money" 23%) and access (**being able to watch via difference devices/locations** 25%). No other reason was selected by more than 12%.

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



Base: n=717 (streamed live sports events online in the past 3 months)

Male respondents	Female respondents
1. Being able to watch live sports instantly whenever I want (41%) 2. Having a wide range of live sports events to watch (37%) 3. Exclusive access to live sports events (not available anywhere else) (35%)	1. Exclusive access to live sports events (not available anywhere else) (40%) 2. Being able to watch live sports instantly whenever I want (34%) 3. Having a wide range of live sports events to watch (31%)
Aged 12-15	**Aged 16-24**
1. Having a wide range of live sports events to watch (45%) 2. Exclusive access to live sports events (not available anywhere else) (42%) 3. Being able to watch live sports instantly whenever I want (29%)	1. Being able to watch live sports instantly whenever I want (47%) 2. Having a wide range of live sports events to watch (42%) 3. Being able to watch via different devices/in different locations (e.g. smartphone, tablet, smart TV etc.) (41%)
Aged 25-34	**Aged 35-44**
1. Being able to watch live sports instantly whenever I want (39%) 2. Having a wide range of live sports events to watch (35%) 3. Exclusive access to live sports events (not available anywhere else) (32%)	1. Exclusive access to live sports events (not available anywhere else) (43%) 2. Having a wide range of live sports events to watch (35%) 3. Being able to watch live sports instantly whenever I want (34%)
Aged 45-54	**Aged 55+**
1. Exclusive access to live sports events (not available anywhere else) (37%) 2. Being able to watch live sports instantly whenever I want (37%) 3. Having a wide range of live sports events to watch (35%)	1. Being able to watch live sports instantly whenever I want (43%) 2. Exclusive access to live sports events (not available anywhere else) (39%) 3. Having a wide range of live sports events to watch (31%)

Streaming live sports events

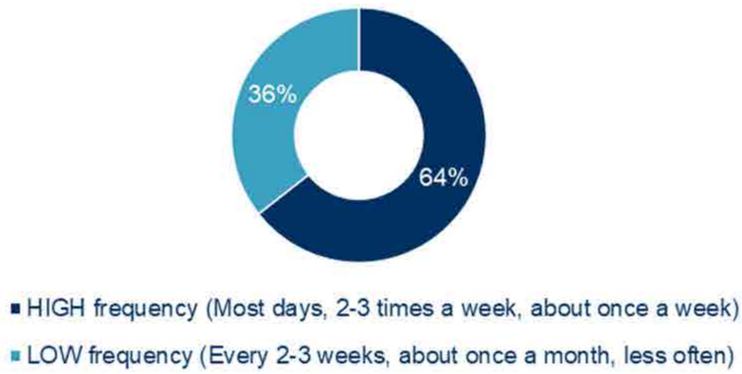
The 15% who had streamed live sports events during the previous three months were asked questions around frequency, volume and sources used.

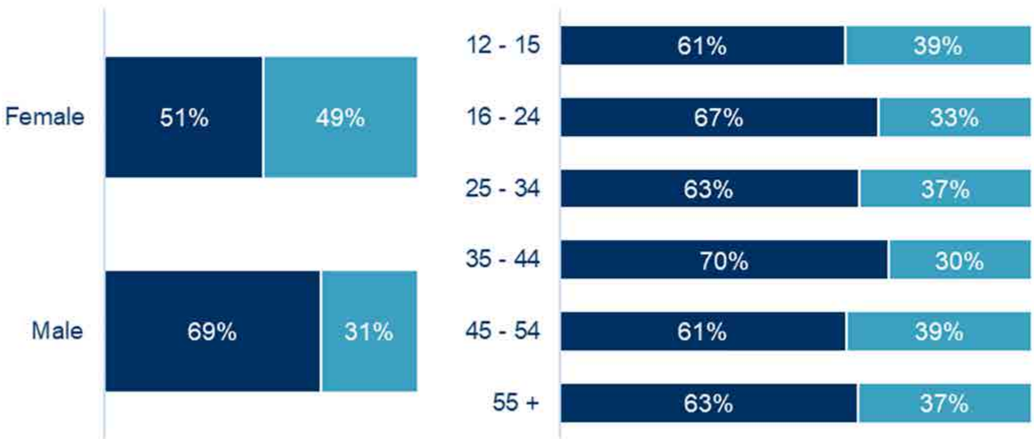
Frequency and volume of streaming live sports events

- Almost two thirds (64%) of those who had streamed live sport did so frequently (i.e. at least once a week). Approximately seven in ten male consumers of live sport did so frequently (69%, which is 18% higher than female respondents).

- Live sport streamers consumed an average of 31 events over a three-month period. Male consumers streamed an average of 37 events, which was 20 events more than female respondents.

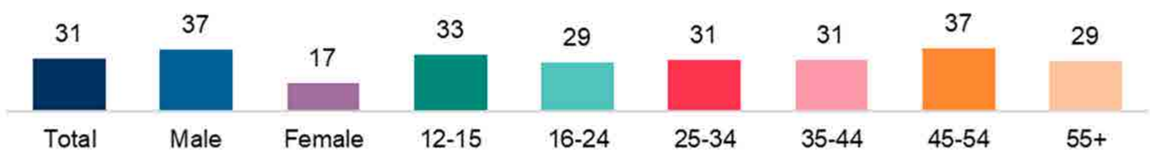
D4. Generally, how often do you stream live sports events through the internet? (%)





Base: n=717 (streamed live sports programmes/series in the past 3 months)

D5. In the past 3 months how many hours did you spend streaming live sports programmes through the internet? (Average number of hours)



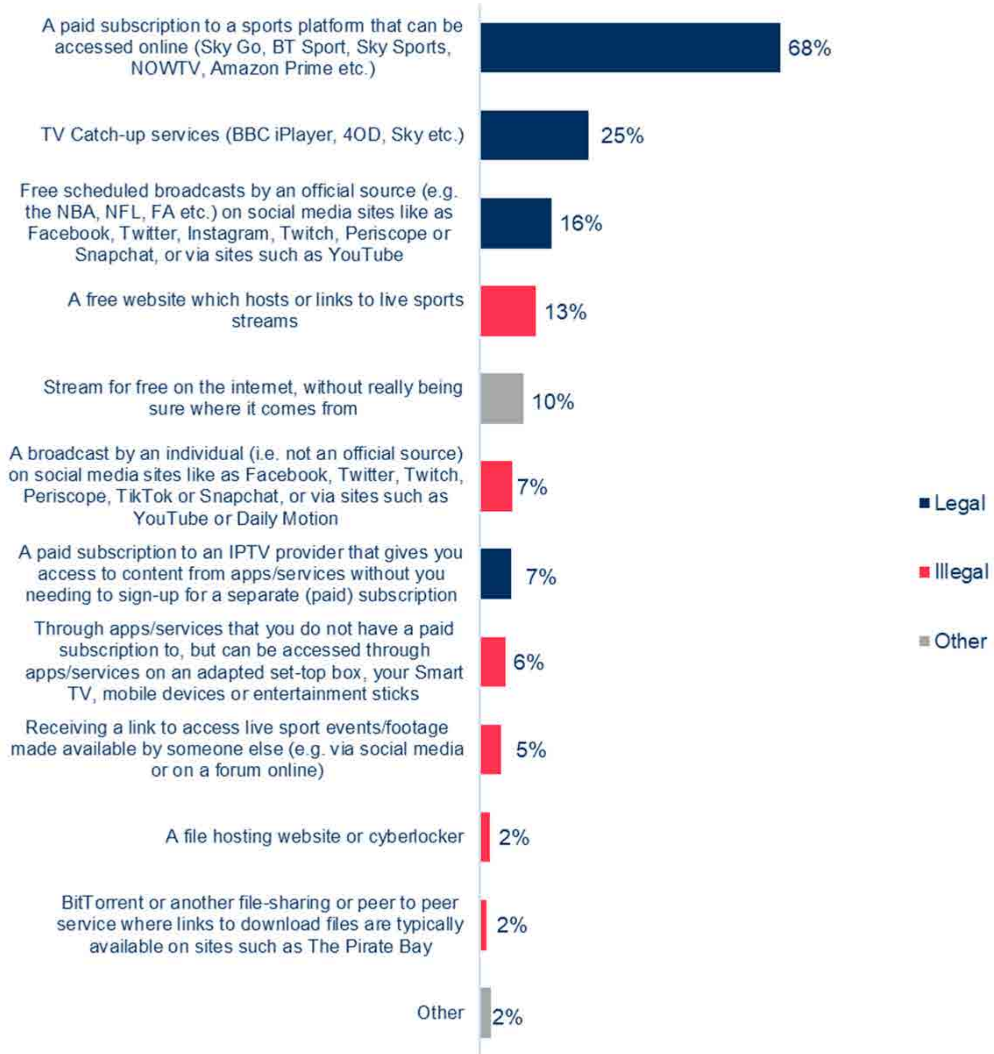
Base: n=704 (streamed live sports programs in the past 3 months)

Sources of live sport streaming

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 (68%) of live sports streamers.
- The next most common option was “TV Catch-up services”, selected by around a quarter (25%).
- The most commonly used illegal method was using **“A free website which hosts or links to live sports streams”, which was used by 16%.** No other illegal method was selected by more than 7% of respondents.

D6. Which of the following have you used to stream live sports events in the past 3 months? Please select all that apply (%)



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
A paid subscription to a sports platform that can be accessed online (Sky Go, BT Sport, Sky Sports, NOWTV, Amazon Prime etc.)	67%	70%	79%	60%	70%	66%	71%	67%
A paid subscription to an IPTV provider gives you access to content from apps/services without you needing to sign-up for a separate (paid) subscription	7%	7%	15%	8%	11%	4%	9%	2%
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 or Daily Motion	17%	14%	19%	17%	20%	20%	14%	9%
A broadcast by an individual (i.e. not an official source) on social media sites like as Facebook, Twitter, Twitch, Periscope, TikTok or Snapchat, or via sites such as YouTube or Daily Motion	7%	8%	9%	13%	7%	8%	7%	4%
A file hosting website or cyberlocker	3%	2%	2%	4%	3%	4%	2%	0%
BitTorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay	2%	1%	2%	2%	2%	2%	0%	0%
A free website which hosts or links to live sports streams	14%	9%	6%	24%	12%	12%	11%	11%
TV Catch-up services (BBC iPlayer, 4OD, Sky etc.)	24%	25%	28%	20%	21%	20%	20%	36%
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-top box, your Smart TV, mobile devices or entertainment sticks such as the Amazon Fire Stick or the Google Chromecast	6%	7%	9%	2%	6%	5%	10%	5%
Receiving a link to access live sport events/footage made available by someone else (e.g. via social media or on a forum online)	5%	3%	8%	5%	3%	6%	3%	6%
Stream for free on the internet, without really being sure where it comes from	11%	6%	8%	12%	7%	13%	10%	9%
Other	3%	2%	0%	2%	2%	2%	4%	3%

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

Base: n=717 (streamed live sports events in the past 3 months from the listed sources)

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

Those unsure of the source of their streams were asked to explain more in their own words about how they obtained them.

The most common approach described was searching for a stream of a specific game via a search engine, then going through trial and error by following the results to websites where it was possible to watch the game. Alternatively, a similar approach was taken by searching on social media or fan forums and following any links found. A site that was specifically mentioned was hesgoal.com.

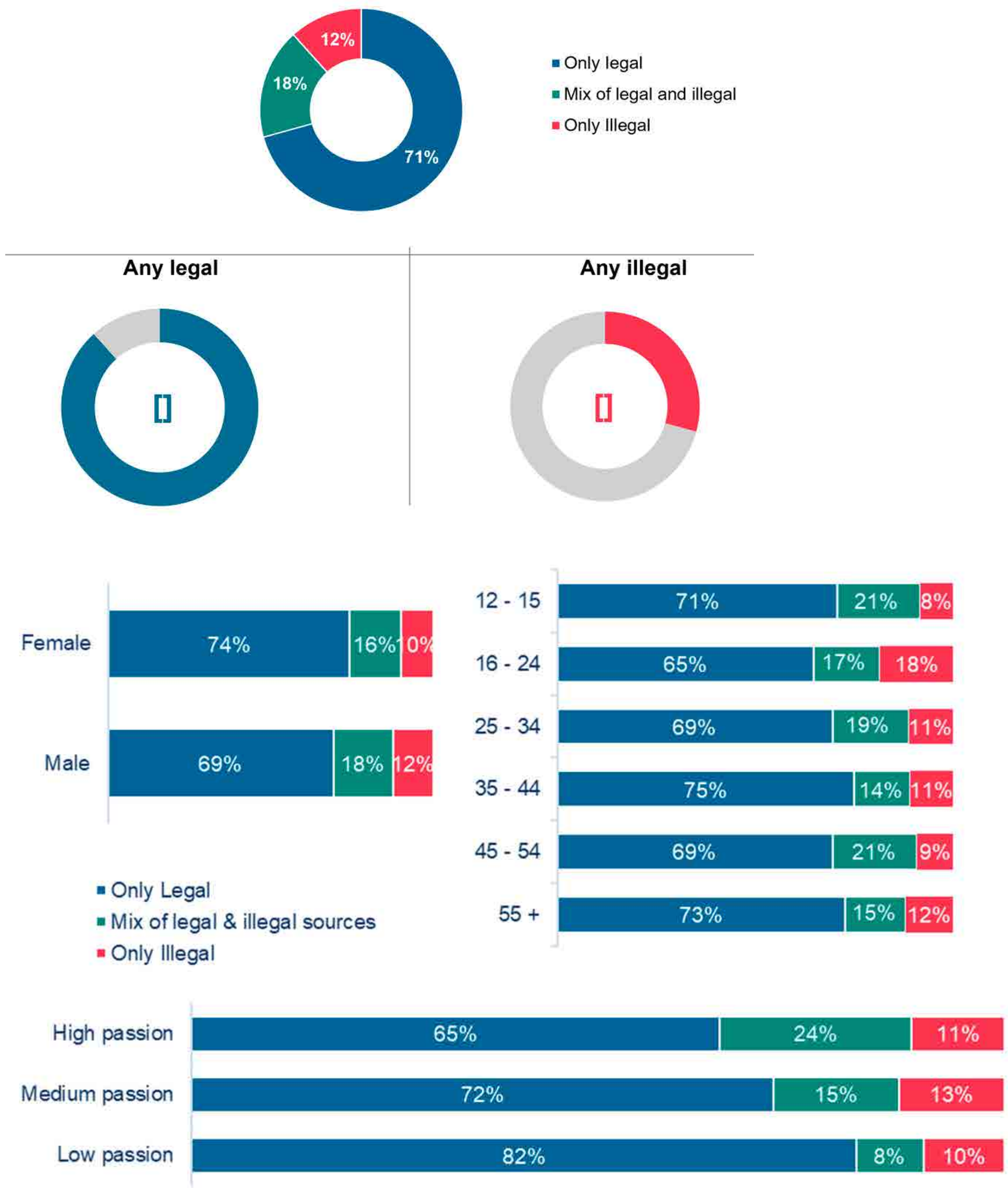
Friends or family members provided access to games for some, either in person or by providing a link to a game.

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 "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 in this way was not included in the base.

- Legal:
    - Overall 88% had used at least one legal source to stream live sport.
    - **71%** had used only legal sources.
- Illegal:
    - **29%** had used at least one illegal source to access live sport.
    - 12% had used illegal sources only to access live sport.
    - Use of only illegal sources was highest in in those aged 16-24 (18%) with it ranging from 8-12% in all other age groups.
    - Illegal sources accounted for 18% of all live sports watched online.
- Mixed:
    - 18% had used a mix of legal and illegal sources.
    - Use of a mix of sources was consistent across all age groups where it ranged from 14-21%.
    - Those with a high passion for live sport were most likely to use a mix of legal and illegal sources. At 26%, this was 9% higher than those with a medium passion and 16% higher than those with a low one.



Base: n=690 (streamed live sport in the past 3 months, with those who selected 'other' or 'not sure of source' removed)

D7. And how is your live sport streaming time typically split across the following sources?

Legality	Source	Average % of usage split
Legal	A paid subscription to a sports platform that can be accessed online (Sky Go, BT Sport, Sky Sports, NOWTV, Amazon Prime etc.)	56%
	TV Catch-up services (BBC iPlayer, 4OD, Sky etc.)	12%
	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 or Daily Motion	7%
Illegal	A free website which hosts or links to live sports streams (Wiziwig, First Row Sports, Ronaldo7 etc.)	6%
	A paid subscription to an IPTV provider (Insight IPTV, Gears TV etc.) that gives you access to content from apps/services without you needing to sign-up for a separate (paid) subscription	3%
	A broadcast by an individual (i.e. not an official source) on social media sites like as Facebook, Twitter, Twitch, Periscope, TikTok or Snapchat, or via sites such as YouTube or Daily Motion	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-top box, your Smart TV, mobile devices or entertainment sticks such as the Amazon Fire Stick or the Google Chromecast	2%
	Receiving a link to access live sport events/footage made available by someone else (e.g. via social media or on a forum online)	2%
	A file hosting website or cyberlocker (MediaFire, Rapidgator etc.)	1%
	BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent, eMule) where links to download files are typically available on sites such as The Pirate Bay, Torrentz, or Rarbg	0%
Other	Stream for free on the internet, without really being sure where it comes from.	5%
	Other	2%

Base: n=717 (streamed live sport in the past 3 months)

Qualitative insight

When it came to accessing live sports via unofficial methods, the most used by Online Community participants were accessing links to streams hosted for free on websites, getting access to links via social media/online forums or watching live broadcasts by individuals. The driving factors behind access via these methods were cost and the perception that paying to access sports via official sources such as BT Sports or Sky Sports was too expensive. Additionally, participants said that many of the games or events they wanted to watch weren't available on official platforms in the first place. Especially when some people were looking for content from places outside of the UK, this content was rarely available via legal means in the UK.

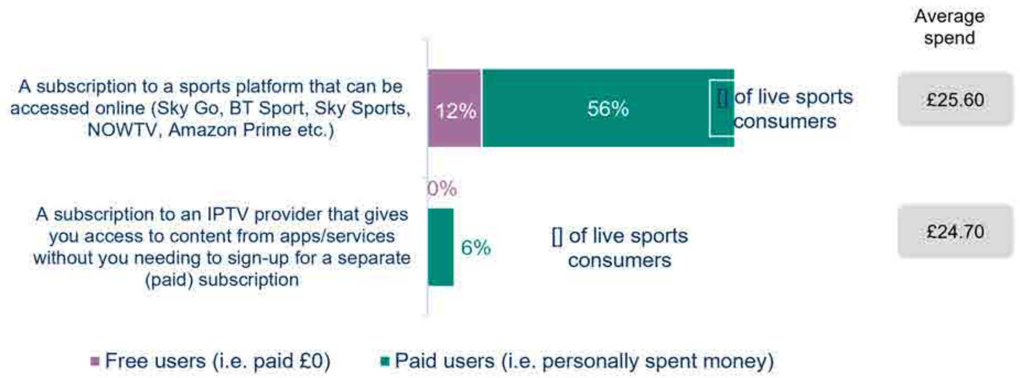
Despite the benefits of these unofficial sources associated with cost and availability, the quality of streams accessible via these means was often compromised and participants mentioned streams lagging or cutting out completely was frustrating and sometimes meant they missed key moments of games or events.

- *"I have the BT Sport app included as part of my contract but I do not get access to all the games I want. To supplement this, I do use a lot of streaming via free websites which host links to streams and getting links from social media or on forums. Before the lockdown, this was mainly because the games I wanted to see were not available on TV in this country. Especially if they were kicking off at 3pm. I would always use 'legal' means when possible but this is limited. I watched several games on BBC when they were available during lockdown and used Amazon when possible, but with Sky I feel the price is too high. If I just want to watch a couple of games a month with the team I follow, I would usually go to the pub, but this was obviously not possible during lockdown. I could not afford to pay the substantial cost during lockdown. If I was offered sports all in one place, I would gladly pay."* - Male, 25-34
- *"I usually access live sport online via a free website which hosts or links to live sports streams or by receiving a link to access live sport events/footage made available by someone else. I use both of these sources as they are the easiest ones to access and are usually good quality. The main weakness for both is that sometimes they buffer a lot and pause. I have been using these ways of accessing live sport for years... Probably over 10 years."* - Female, 25-34
- *"I only ever watch live sports through a free website with streaming links or a broadcast by an individual on Facebook. In the past, I have tried to access football matches through Kodi, which was never conducive to enjoying a live game as it would freeze and drop the stream at a critical point. I have been using HesGoal and Facebook live to watch matches for around a year now. Obviously the main benefit is that it doesn't cost me any money and is easy to access. The downside is that sometimes the stream lags or drops completely, often when my team is on the attack. I think these methods of viewing are extremely important now as pubs are closed and the exorbitant fees that BTSport, SkySports et al charge are unjustifiable. If subscription prices were more reasonable, I would consider paying for watching matches. I would pay £20 a month for sport all in one place."* - Male, 35-44

Paying for live sports

- Approximately two thirds (68%) of live sport consumers said they had used **a subscription to a sports platform** (e.g. Sky Go) in the previous three months, with most making a personal contribution towards a subscription (56% of live sport consumers). They spent, on average, £25.60 each month.
- A smaller proportion (7%) of live sport consumers had a subscription to an IPTV provider. They spent, on average, about the same as would be spent on a subscription to a sports platform (£24.70 a month).

D8. Approximately how much do you personally spend each month on the below sources of streaming live sport? (Proportion of live sport consumers over past three months using a paid source and average amount spent each month by users of that source)



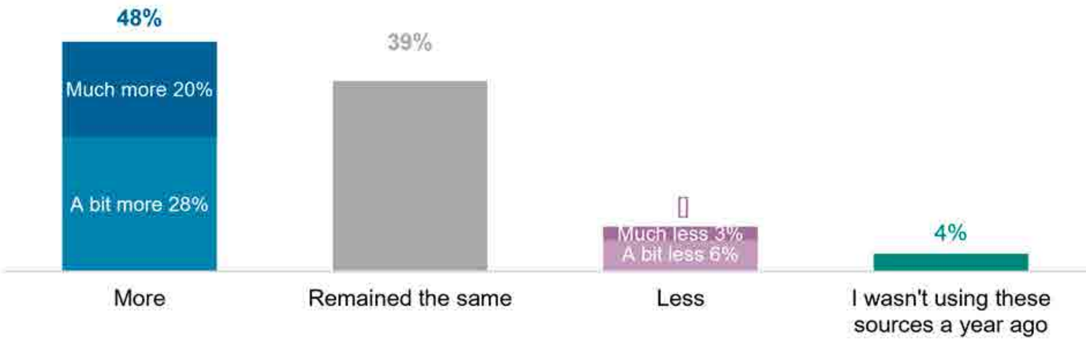
Base: n=392 (streamed live sport in the past 3 months). n=17-503 (those who used each of the sources to stream live sports)

Change in use of illegal sources

Those who had used an illegal source to stream live sport were asked how the use of these sources compares to the same point a year ago.

- Respondents were fairly evenly split between those whose usage had increased (48%) and those whose use had remained the same (39%). This was followed by those who said their usage was less (9%) with a smaller number saying that they weren't using these sources a year ago (4%).

D9. You said you stream live sports events using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=198 (streamed live sport illegally)

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

For those whose use of illegal sources had **increased** in the last year, the COVID-19 pandemic and the demand for entertainment content during their increased time at home was mentioned frequently. Furthermore, the inability to spectate at a stadium/sports venue or at a pub/bar meant those who would usually do so had to seek out alternatives.

- *"I have more time at home now than I did before COVID."* - Male, 55+
- *"Because of the COVID-19 and lockdown, I have been home and watching more sports."* – Female, 45-54
- *"To watch my favourite football team while I can›t go to the football."* - Male 55+
- *"Usually I would have watched in pubs without COVID."* - Male, 25-34
- *"I am unable to go to the games due to COVID so I am streaming and watching on tv/laptops more."*- Male, 12-15
- *"I've been unable to attend events in person and some are not covered in the package subscription I have."* - Male, 35-44
- *"I have had more time to watch sports over the past year, so my demand has increased. I'm also probably accessing more worldwide sports which are available on these kinds of sites."* - Male, 35-44

Not having to pay for illegal sources was a common reason for choosing to access live sports in this way. For some, it was also challenging to find the specific sports/teams (e.g. smaller or international football leagues, certain sports etc.) they wished to watch via legal sources, so illegal alternatives were sought out.

- *"It's easily accessible and free."* - Female, 25-34
- *"Easy to access and cheap plus you get to see exactly what you want."* - Male, 45-54
- *"I can watch football that isn't on free to air tv."* - Male, 45-54
- *"Because they are the only place I can watch my local football team live."*- Male 35-44

Those whose usage of illegal sources had **decreased** in the last year cited changes in their circumstances (e.g less time to watch) or in their interest in sport, and having access to a paid legitimate source as having led to a decline. Some also mentioned experiencing issues with illegal sources in the past as having had an impact on their frequency of use.

- *“I now have Sky Sport and BT Sport which cover most of the sport I watch.”* - Male, 55+
- *“The live sports events that I’m interested in are usually on BT Sport to which I have a monthly subscription.”* - Female, 25-34
- *“I’m not that interested at the moment.”*- Male, 16-24
- *“The amount of sports I watch has dropped.”* - Male, 25-34
- *“The videos rarely stream consistently - they keep freezing up.”*- Female, 45-54

Of the small number of respondents who had taken up the use of illegal sources in the last year, many had done so because they felt they had a lack of other options.

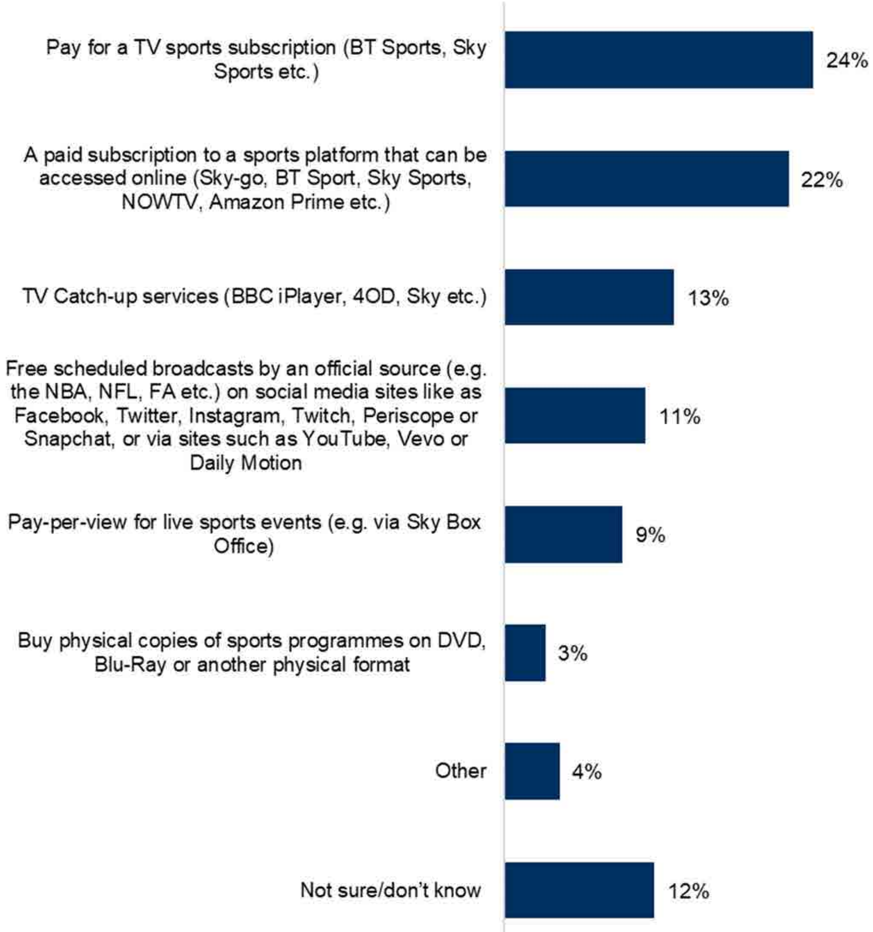
- *“Stadia were closed due to COVID and football matches were streamed by the club I support.”* - Male, 55+
- *“I had no other option with the pubs shut.”* - Male, 45-54

Alternatives to infringement

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

- Encouragingly, paid options accounted for the top two sources that would be used if illegal sources were no longer available: “Pay for a TV sports subscription” (24%) and “a paid subscription to a sports platform that can be accessed online” (22%).
- No other option was selected by more than 13%, with a high proportion of respondents (12%) not sure what they would do if illegal sources were no longer available.

D10. If live sport 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 TV sports subscription (BT Sports, Sky Sports etc.)	27%	17%	42%	14%	26%	25%	15%	30%
A paid subscription to a sports platform that can be accessed online (Sky-go, BT Sport, Sky Sports, NOWTV, Amazon Prime etc.)	22%	23%	15%	34%	26%	25%	15%	16%
TV Catch-up services (BBC iPlayer, 4OD, Sky etc.)	11%	21%	7%	7%	9%	15%	24%	15%
Free scheduled broadcasts by an official source (e.g. the NBA, NFL, FA etc.) on social media sites like as Facebook, Twitter, Instagram, Twitch, Periscope or Snapchat, or via sites such as YouTube, Vevo or Daily Motion	10%	15%	7%	4%	7%	13%	24%	12%
Pay-per-view for live sports events (e.g. via Sky Box Office)	9%	12%	22%	17%	12%	7%	6%	2%
Buy physical copies of sports programmes on DVD, Blu-Ray or another physical format	3%	4%	0%	6%	4%	3%	3%	2%
Not sure/don't know	13%	8%	8%	18%	11%	6%	9%	16%

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

Base: n=198 (streamed live sport illegally)

Qualitative insights

Participants in the Online Community felt the loss of unofficial sources of live sports would be frustrating and have a big impact on their consumption. This was mostly down to passion and fandom for sport. Many wanted to be able to watch a wide variety of sports or fixtures within particular sports out of sheer enjoyment as opposed to only following the progress of their favourite team. Most felt that being restricted to official sources only would mean losing access to content they loved as well as splintering their consumption across various platforms leading to increased costs in subscriptions.

The effect of losing access to unofficial sources meant most participants predicted that they would likely consume less live sports content and have to search further for all possible legal forms of access without wanting to pay more and add more subscriptions.

The hypothetical idea of one platform which hosted all live sports content was popular. On average, participants said they would pay between £15-£20 per month for such a subscription.

- *"I think I would feel very restricted if I could only use official sources. This would be because I cannot choose what I want to watch. With paid subscriptions, there are selected matches available whereas with free ones, I can get almost anything I want. I can watch obscure leagues and random sports at any time, but with official streams, it is only what they are showing. I think if I could no longer access unofficial streams, I would be put off sport a little. I would only be able to follow certain games with text updates which would not be as interesting and exciting as the actual game."* - Male, 25-34
- *"I would feel disappointed and angry if I lost access. I would definitely watch less sport if the above took place. I would stick to watching Sky Sports, BBC, ITV, C4, C5, social media and bookmaker sites. I cannot think of any other free platforms I could use but I would not pay any more money as I feel I pay enough already. I would probably consume less as I would have less choice...how can I watch a Polish premier division game on these choices??"* - Male, 55+
- *"I would be very disappointed if there was no way to access the matches I wish to watch for free. Obviously because I wouldn't get to see them, but also because the main industry approved methods may not be showing those particular games. One of the best things about the unofficial streaming is that you're almost guaranteed to find the games somewhere. If those were taken away, it would be an astronomical cost paying for every game/platform that is broadcasting. Away games for example, may be broadcast by the home teams' own website, which I would be reluctant to pay for as I would not like to further line the pockets of rivals. I would imagine if there was no way to watch games live for free, I would make do with watching highlights on MOTD on BBC, or on YouTube a few days after the match(es)."* - Male, 35-44
- *"If I couldn't access free sport I probably wouldn't pay for it. It would be annoying but I'd probably see friends to watch certain sports or go to sports bars. So I'd probably access less content."* - Female, 16-24

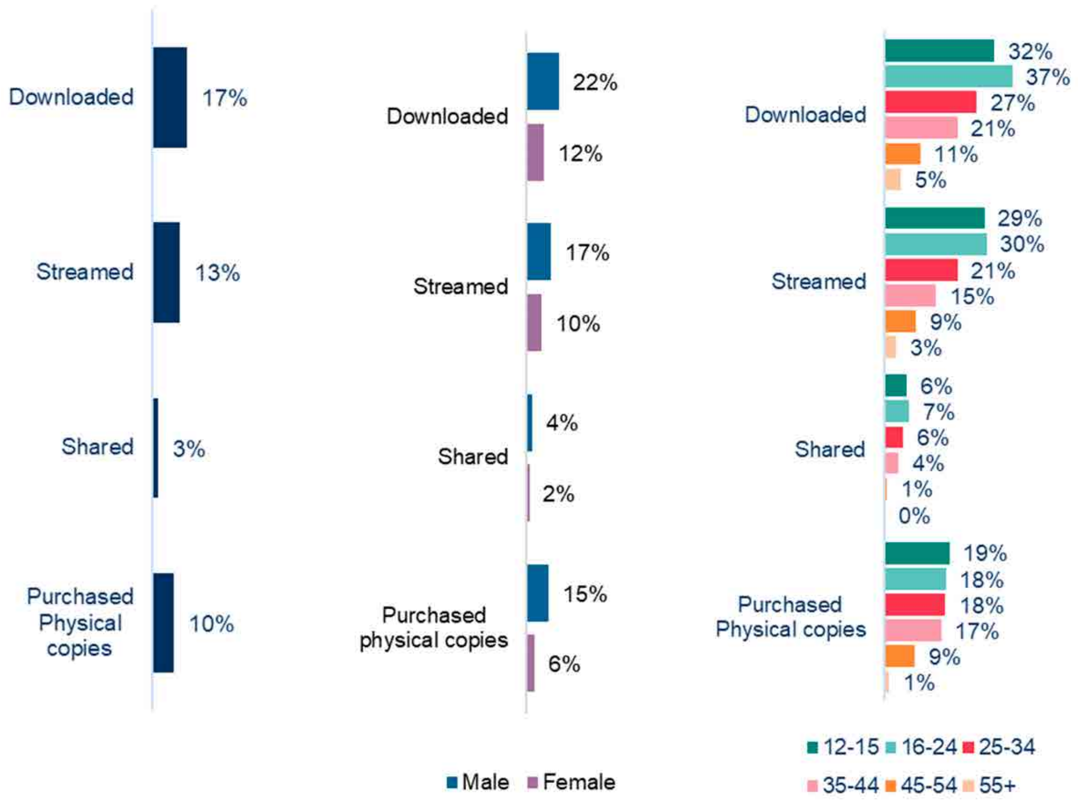
Video Games

Engaging with video games

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

- Downloading was the most common method of accessing video games, with 17% having done so. Streaming followed at 13% and 10% had purchased physical copies.
- Across downloading, streaming and purchasing physical copies, male respondents were more engaged than females.
- 12-24 year olds were the most engaged with downloading (32-37%) and streaming (29-30%) video games. These both decreased among each subsequent age group, with 5% of those aged 55+ streaming and 3% downloading games.

E1. Have you downloaded/streamed/shared[1]/purchased physical copies of Video Games in the past 3 months?



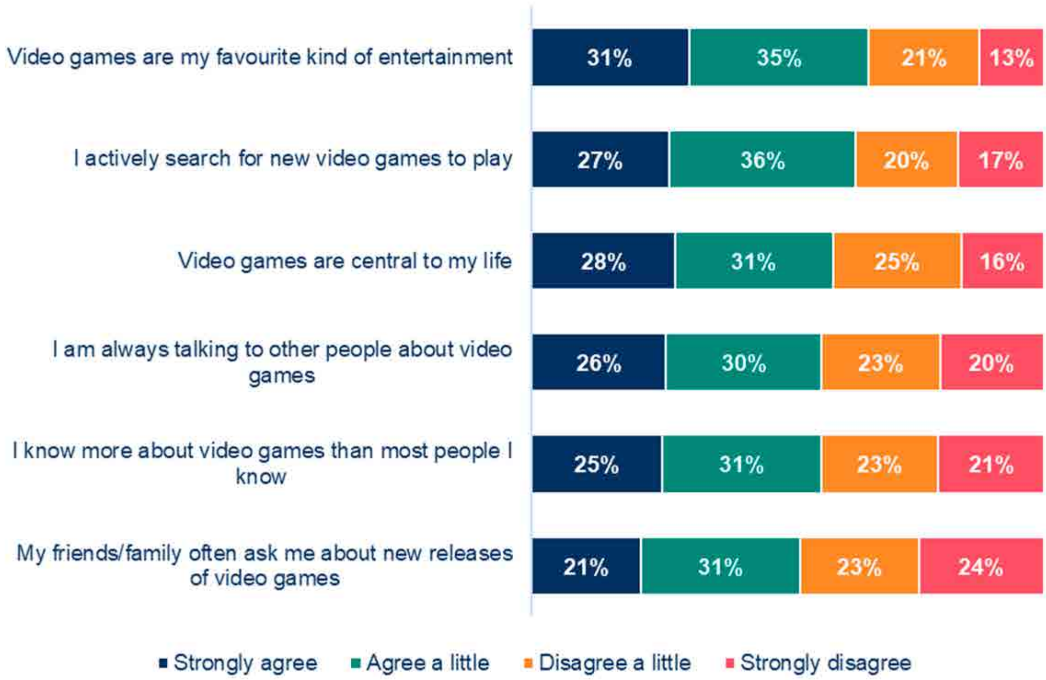
Base: n=5,000 (total sample)

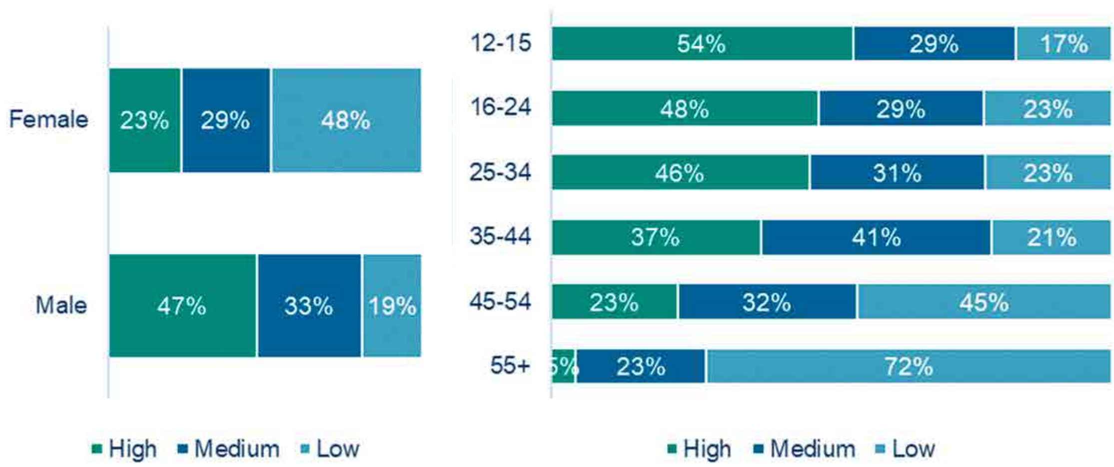
1 The definition of 'shared' was provided as: "By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated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

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

- Four in ten (39%) displayed a **high passion** for video games.
- Those with a high passion for video games were more likely to be male (47% compared with 23% of females) and to be younger (at least 37% of those aged between 12-44.)
- Looking at individual statements, the **importance** of video games in their lives is evident. They were most likely to agree that "video games are my favourite kind of entertainment" (66%). **Discovery** was also key with 63% agreeing that "I actively search for new video games to play".

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





Base: n=1,222 (downloaded, streamed, shared and/or purchased physical copies of video games in the past 3 months)

Qualitative insight

Participants in the Online Community this year reported having been highly engaged with and thankful for video gaming during the multiple lockdowns. Participants described being able to disappear into imaginary worlds and connect with others, whether in their household, as families or with other gamers online, at a time when social contact had otherwise been minimised. Many felt grateful for the entertainment, distraction and social interaction video gaming provided which some reported to have substantially improved their mental health. Given these benefits, some said they had intensified their consumption during lockdowns, gaming around four times a week or more.

As restrictions ease going forward, most participants said their consumption of video gaming would inevitably decrease given the opening up of the outside world and the possibility to do a greater range of activities again. A few felt they wanted to concentrate on more hobbies outdoors, having spent so much time gaming and generally watching screens during the past year. However, many wanted to reserve time to keep playing video games two or three times a week.

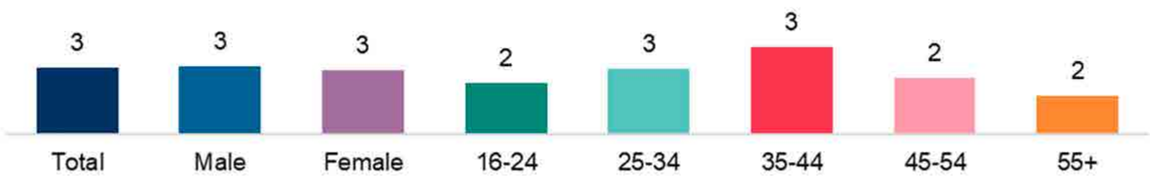
- *"In the last year, I was playing video games almost every day with my son and husband. We usually played for an hour in the evening. Most of the games are either educational, trivia or casual fun games to spend time and to educate my child as well. During the lockdown, video games helped us to stay positive and to engage in a virtual world. We had a lot of fun."* - Female, 25-34
- *"I would say that over the past year I have been accessing video games multiple times a week as it has been a massive entertainment filler for me during the lockdown period. I have become massively reliant on video games during the past year as they have been a big source of escapism for me and have often distracted me from negative thoughts and motivation issues. I think as life goes forward and the lockdown eases, I will naturally start gaming less as I get back to normality and start venturing outside to meet friends and actually go to my workplace instead of working from home."* - Male, 16-25
- *"During the last year I began to access video games 4 times a week, more than usual. I did it in the afternoons or at night after finishing work and on the weekends I had more time to play with my children and online with my friends. I think it helped me not to be stressed or feel anxiety during the last year. I feel that in the coming months I will not have as much time to access video games as I do now, but I will have to organize my time to continue with this activity that is so fun for me."* - Male, 25-34

Physical purchasing of video games

The 10% of respondents who had purchased video games in physical formats during the previous 3 months were asked about the number of purchases made.

- The average number of video games purchased in the previous 3 months was the same for males and females (3).
- The number of video games purchased was also similar across age groups.

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



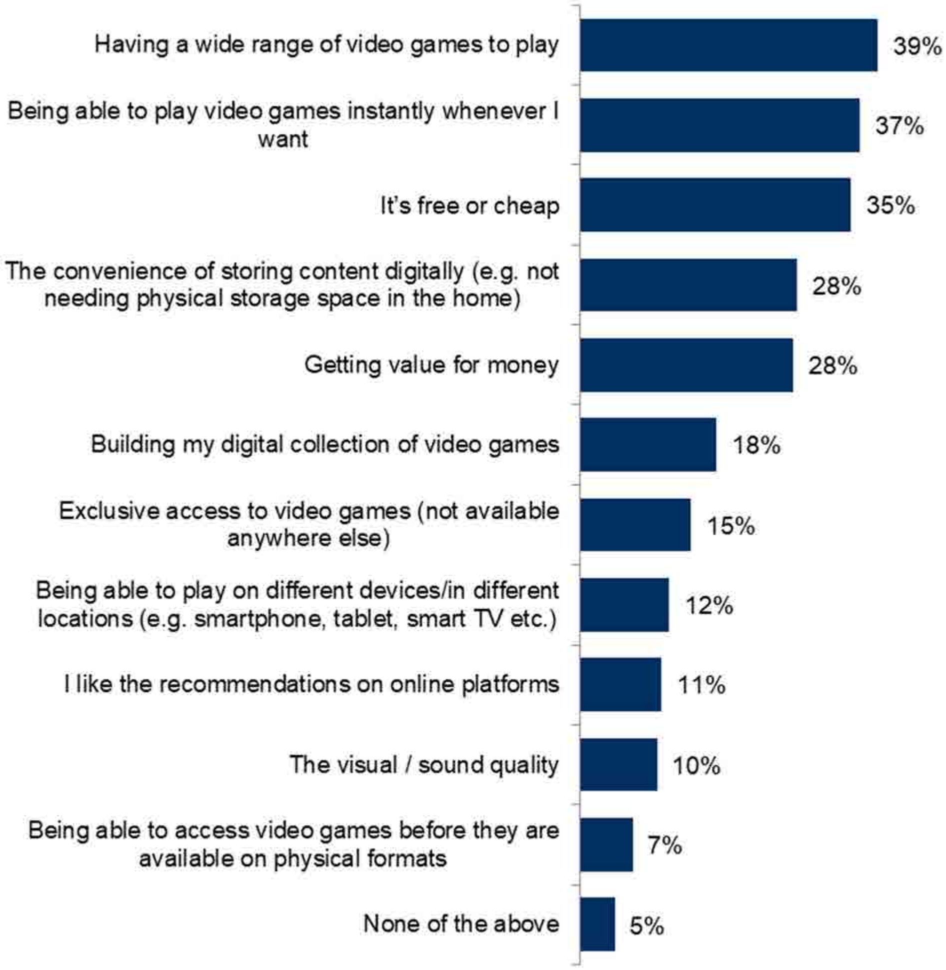
Base: n=471 (purchased physical copies of video games in the past 3 months)

Understanding online consumption of video games

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

- No single reason was selected by more than 39% of respondents, suggesting a fairly broad range of motivations. The two that resonated the most strongly related to the **range** of options available (“Having a wide range of video games to listen to” 39%) and convenience (“Being able to play video games instantly whenever I want” 37%).
- **Price** (“It’s free or cheap” 35%) was the third most popular reason and somewhat ahead of the rest with “getting value for money” also important (28%).
- **Convenience of storing content digitally** was selected by 28%.
- **Added value features,** such as recommendations from online platforms, visual/sound quality and being able to access video games before they are available on physical formats were selected by smaller proportions.

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



Base: n=1,028 (accessed video games online in the past 3 months)

Male respondents	Female respondents
1. Having a wide range of video games to play (43%) 2. Being able to play video games instantly whenever I want (35%) 3. Getting value for money (32%)	1. It's free or cheap (46%) 2. Being able to play video games instantly whenever I want (39%) 3. Having a wide range of video games to play (33%)
Aged 12-15	**Aged 16-24**
1. Having a wide range of video games to play (40%) 2. Being able to play video games instantly whenever I want (37%) 3. It's free or cheap (35%)	1. Having a wide range of video games to play (42%) 2. Being able to play video games instantly whenever I want (36%) 3. It's free or cheap (34%)
Aged 25-34	**Aged 35-44**
1. Having a wide range of video games to play (39%) 2. It's free or cheap (30%) 3. Being able to play video games instantly whenever I want (30%)	1. Having a wide range of video games to play (43%) 2. Being able to play video games instantly whenever I want (35%) 3. Getting value for money (34%)
Aged 45-54	**Aged 55+**
1. Being able to play video games instantly whenever I want (44%) 2. It's free or cheap (43%) 3. Having a wide range of video games to play (38%)	1. It's free or cheap (54%) 2. Being able to play video games instantly whenever I want (46%) 3. Having a wide range of video games to play (25%)

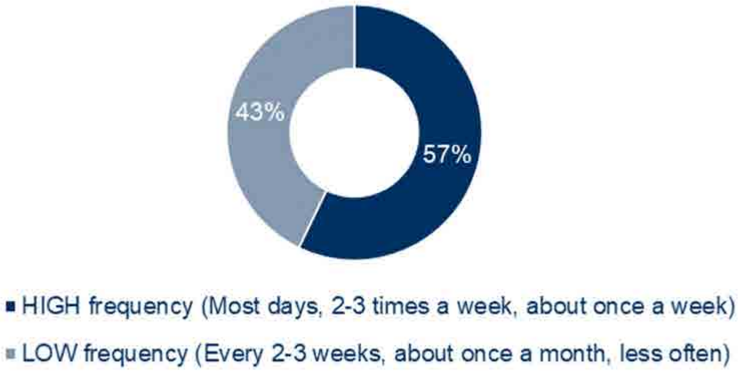
Accessing video games online

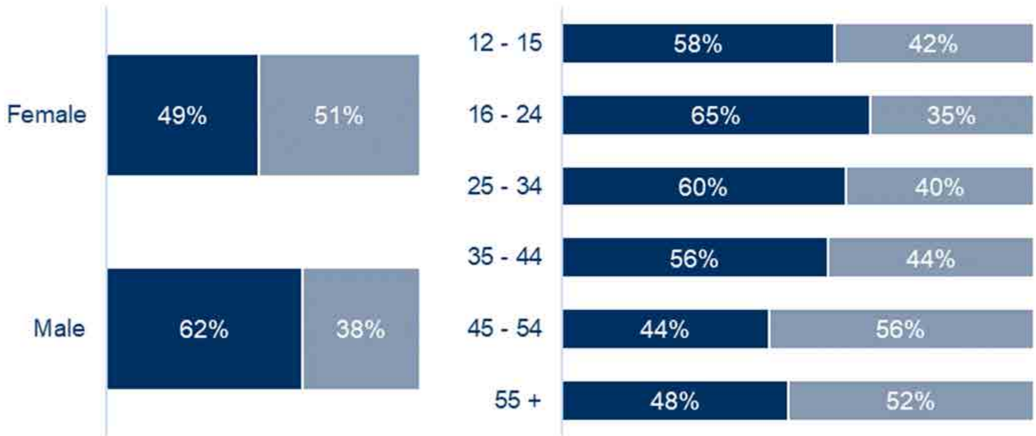
The 21% who had accessed video games online during the previous three months were asked questions around frequency, volume and sources used.

Frequency and volume of accessing video games

- Over half (57%) accessed video games frequently (i.e. at least once a week).
- Weekly access was most common among those aged 16-24, with nearly two thirds (65%) doing so. Though frequent access was less common among the two oldest age groups, there was still a large proportion who accessed video games weekly. 44% of those aged 45-54 and nearly half (48%) of those aged 55+ had done so.
- An average of 22 video games had been accessed during the previous three months.
- This was highest among males, who, on average, accessed 25, compared to 18 by females, and the two youngest age groups (12-15 and 16-24) who had accessed 24 and 26 video games respectively.

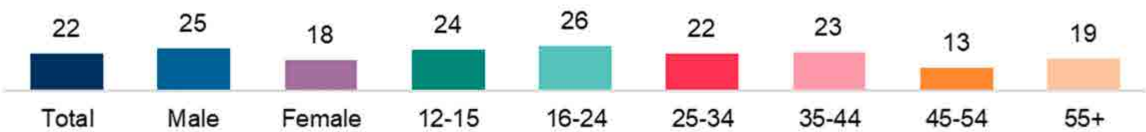
E5. Generally, how often do you stream/access video games through the internet? (%)





Base: n=1,028 accessed video games in the past 3 months)

E6. In the past 3 months how many video games did you download/access through the internet? (Average number of downloads)



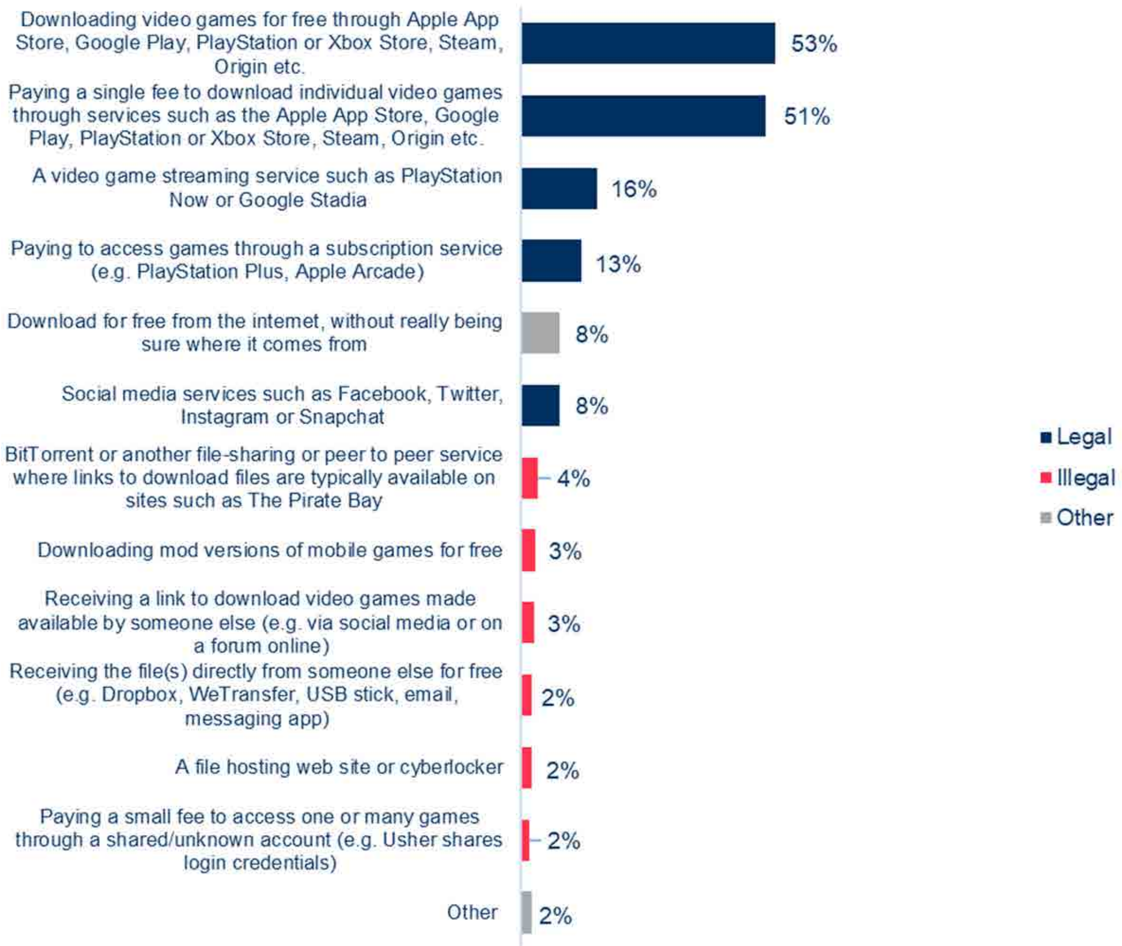
Base: n=1,008 (accessed video games in the past 3 months)

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 those who were unsure of the exact source.

- **The two most used sources for accessing video games by far were legal.** Half accessed video games for free through Apple App Store, Google Play, PlayStation/Xbox store, Steam etc. (53%) and by 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. (51%).
- All illegal sources were used by considerably smaller proportions (2/3%).
- Those aged between 16-24 were most likely to 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. (66%). Between 41-58% of other age groups accessed video games this way apart from those aged 55+ where it fell to 18%.
- Those aged 55+ were the most likely to access video games on social media (21%) compared to younger age groups (5-13%).

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%	39%	52%	64%	58%	53%	41%	18%
Downloading video games for free through Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc.	53%	53%	48%	60%	54%	50%	54%	51%
A video game streaming service such as PlayStation Now or Google Stadia	20%	10%	21%	15%	19%	19%	14%	3%
Social media services such as Facebook, Twitter, Instagram or Snapchat	7%	10%	12%	5%	6%	5%	10%	17%
A file hosting web site or cyberlocker	2%	2%	4%	3%	3%	2%	0%	0%
BitTorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay	5%	1%	2%	4%	5%	5%	2%	1%
Receiving the file(s) directly from someone else for free (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	2%	3%	3%	2%	2%	3%	3%	1%
Receiving a link to download video games made available by someone else (e.g. via social media or on a forum online)	4%	2%	5%	2%	3%	4%	2%	1%
Downloading mod versions of mobile games for free	4%	2%	2%	2%	4%	5%	2%	1%
Paying a small fee to access one or many games through a shared/unknown account (e.g. Usher shares login credentials)	2%	1%	1%	3%	3%	3%	0%	0%
Paying to access games through a subscription service (e.g. PlayStation Plus, Apple Arcade)	14%	10%	18%	14%	14%	11%	10%	6%
Download for free from the internet, without really being sure where it comes from	7%	11%	11%	4%	7%	8%	5%	20%
Other	1%	4%	1%	2%	1%	2%	4%	6%

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

Base: n=1,028 (accessed video games in the past 3 months from the listed sources)

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

Those unsure of the source of the games they had downloaded/accessed were asked to explain more in their own words about how they obtained them.

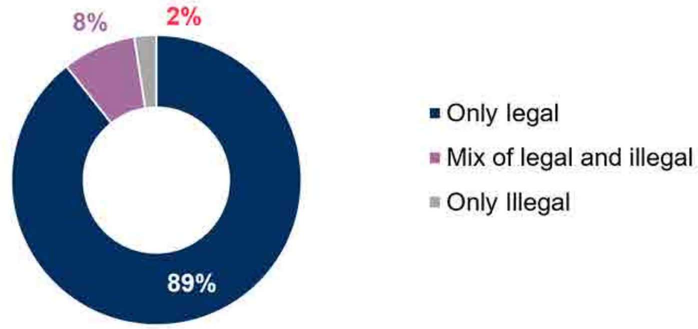
The most common approach described was searching for a game alongside terms such as “free” via a search engine, then following the results to websites where it was possible to download or access the game. Some obtained games via the App Store or Google Play store, or via Facebook, but were unsure about the exact source and legality of the games they had obtained.

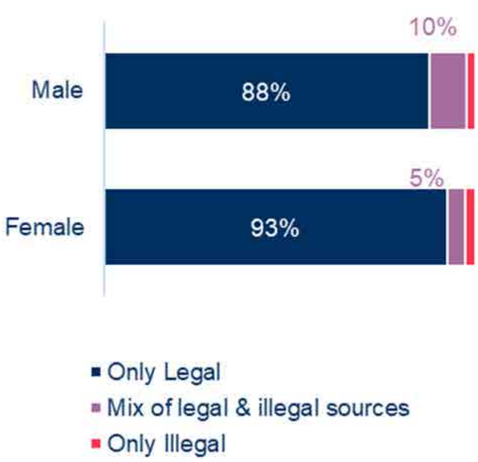
Legality of accessing video games online

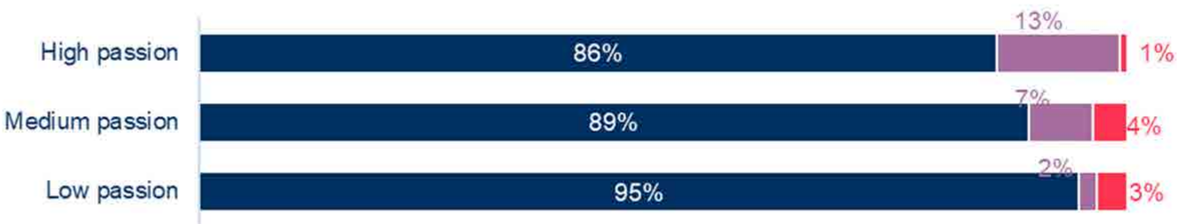
To better understand the distribution of sources across legal and illegal categories, those who had accessed video games in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only, illegal sources only or a mix of the two.

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

- Legal Sources:
  - Overall, 98% had used at least one legal source to access video games.
  - The highest proportion (89%), by some way, had used only legal sources.
  - Across age groups between 88-96% for each of them used only legal sources.
- Illegal Sources:
  - 11% had used at least one illegal source to access video games.
  - 2% had used illegal sources only to access video games.
  - 12% of male respondents had used an illegal source to download video games compared to 7% of females.
  - The proportion who had used illegal sources was similar across all age groups between 12-44. Those aged 25-34 and 35-44 were most likely to have used an illegal source (13%) and those aged 35-44 were most likely to say that they only use illegal sources (4%).
  - 14% of those with a high passion for video games had used an illegal source to make a download which was more than those with a medium (11%) or low level (5%).
- Mixed:
  - 8% had used a mix of legal and illegal sources to access video games.
  - This was highest among those aged 12-15 (26%), 16-24 (22%) and 25-34 (22%).







Base: n=960 (accessed video games online in the past 3 months, with those who selected ‘other’ or ‘not sure of source’ removed)

E8. And how is your video game streaming time typically split across the following sources?

Legality	Source	Average % of usage split
Legal	Paying a single fee to download individual video games through services such as the Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc.	36%
	Downloading video games for free through Apple App Store, Google Play, PlayStation or Xbox Store, Steam, Origin etc	35%
	A video game streaming service such as PlayStation Now or Google Stadia	7%
	Paying to access games through a subscription service (e.g. PlayStation Plus, Apple Arcade)	6%
	Social media services such as Facebook, Twitter, Instagram or Snapchat	4%
Illegal	A file hosting web site or cyberlocker (Zippyshare, Rapidgator, Nitroflare etc.)	1%
	BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent, eMule) where links to download files are typically available on sites such as The Pirate Bay, Torrentz, or Rarbg	1%
	Receiving the file(s) directly from someone else for free (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	1%
	Receiving a link to download video games made available by someone else (e.g. via social media or on a forum online)	1%
	Downloading mod versions of mobile games for free (e.g. APKDrone, APKAward)	1%
	Paying a small fee to access one or many games through a shared/unknown account (e.g. Usher shares login credentials)	0%
Other	Download for free from the internet, without really being sure where it comes from	5%
	Other	2%

Base: n=1,028 (accessed video games online in the past 3 months)

Qualitative insights

When it came to unofficial methods of access, participants used a variety of sources in order to gain access to games for free or to access games which they were unable to find on official platforms or which hadn't been released yet.

The most frequently mentioned methods of access to unofficial, free gaming content amongst participants who infringed were through sharing USBs, Dropbox links or links through Whatsapp with friends, as well as downloading via file hosting or BitTorrent sites. The appeal of sharing downloads on USBs or links between peers was the ability to play the same games as friends and the inherent trust in the content shared. This was in contrast to downloads via BitTorrent or other file sharing sites where the draw was the wealth and breadth of free video game content but where many participants felt there was greater risk in potentially downloading malware or viruses.

Some participants reported feeling hesitant to spend money during the past year of uncertainty, and therefore accessed some video games through unofficial sources. However, many regularly paid for video game content and used unofficial sources as back up options when games weren't widely available on official sources or released yet.

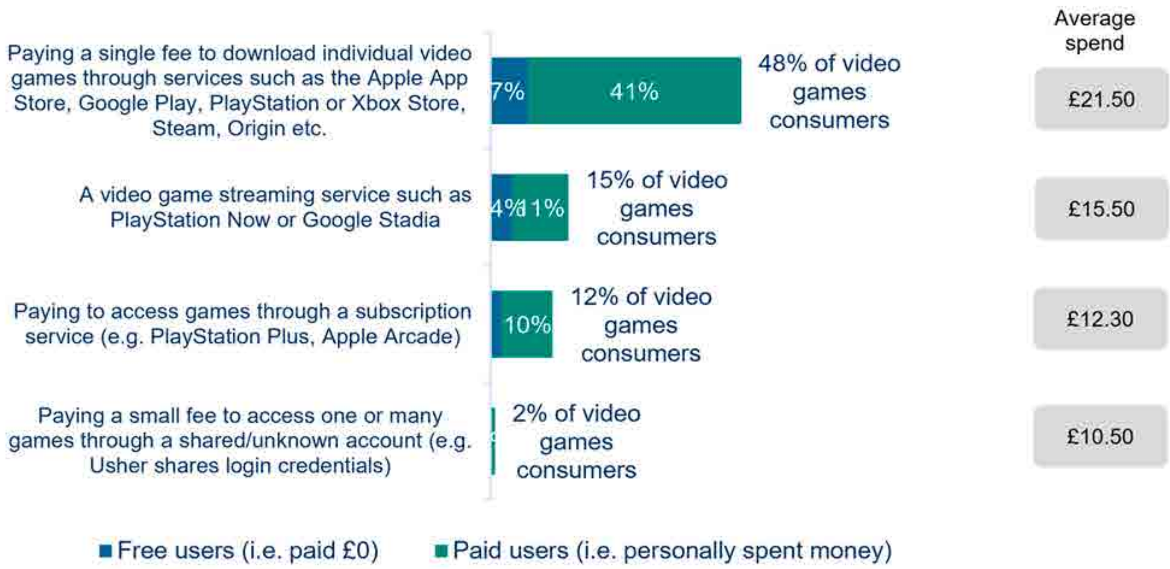
- *“After the lockdown was imposed and we were locked in the house, we started to search games for free. We used Google search and downloaded a couple of games from zippyshare. To be honest, as I do not have access to meet my friends, and as I did not want to pay a hefty amount during this uncertain time, I searched and downloaded 2 games from the internet for free.”* - Female, 25-34
- *“The main reason for using each of these is that they are generally cheaper and in most cases a free method of obtaining triple A games, sometimes before they even hit the market. I have been using these methods for quite a long time and I would say about 5 years since I heavily got into gaming. I would consider these methods to be important to me especially during lockdown as my finances were tight, especially at the start of lockdown.”* - Male, 16-25
- *“For a long time I have used these options because they are easy and fast and sometimes I cannot find the games on an official page. The pros are that it is much faster, easier and often with a lower cost than a new video game which was recently launched on the market but the cons are that some of the download options can be dangerous for our PC. I prefer to use a USB to download a video game and links that my friends share through dropbox as it’s easy and more trustworthy.”* - Male, 25-34

Paying for video games

Those who had used a paid source to either download or stream video games were asked how much they had personally spent on each source.

- Almost half of video games consumers (48%) had paid a single fee to download individual games with most of those (41% of all video games consumers) making a personal contribution towards this. They spent an average of £21.50 each month.
- A video game streaming service and paying to access games through a subscription service were used by 15% and 12% respectively. They spent, on average, between £12.30 and £15.50 on these services.
- A smaller proportion (2%) had paid a small fee to access one or many games through a shared/unknown account. They spent an average of £10.50 a month.

E9. Approximately how much do you personally spend each month on the below sources of streaming/downloading/accessing video games? (Proportion of video games consumers over past three months using a paid source and average amount spent each month by users of that source)



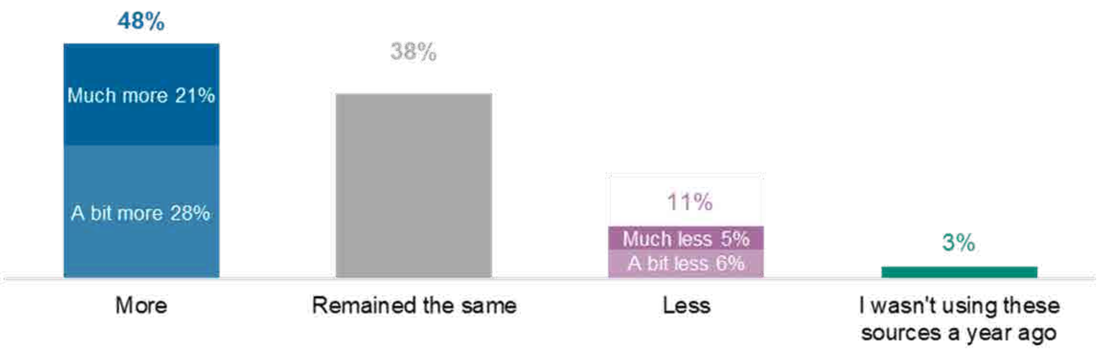
Base: n=1,028 (streamed and/or downloaded video games), n=5-608 (those who used each of the sources to stream/download video games)

Change in use of illegal sources

Those who had used an illegal source to download or stream/access video games were asked how the use of these sources compares to the same point a year ago.

- The greatest proportion, nearly half (48%), of respondents said that their use of illegal sources had increased. For fewer (38%), usage had remained the same. A relatively small number said their usage had decreased (11%) or that they weren't using these sources a year ago (3%).

E10. You said you download or stream video games using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=100 (accessed video games illegally)

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

For the majority, **increased** use of illegal sources was linked to there being more demand for video games because of spending additional time at home during the COVID-19 pandemic, as well as an inability or unwillingness to pay for this content.

- *"Because everything is closed it's easier to play games at home."* - Female, 16-24
- *"Lockdown has freed up time for playing games."* - Male, 16-24
- *"I have more free time to waste because of working at home."* - Male, 16-24
- *"Due to the pandemic I definitely do have more time to play than before."* - Male, 45-54
- *"I needed to fill my time during lockdown."* - Male, 12-15
- *"I do not want to pay for games."* - Male, 45-54

Those whose usage of illegal sources had **decreased** in the last year recounted issues with piracy, both ethical and practical (eg. security issues, poor quality) as having had an impact on their frequency of use. Some also mentioned less interest in video games, and that video no longer fit their life schedule.

- *"I don't like to pirate so I buy mainly from small games companies."* - Male, 12-15
- *"They are very insecure. I find it easier to pay the single fee if I use the app very often or uninstall the app and try to find another similar app."* - Male, 25-34
- *"I've found them to be less successful for downloading games."* - Male, 25-34
- *"I don't really trust these sources that much."* - Male, 25-34
- *"I have less free time and there are not many games that I want to play."* - Female, 12-15

Very few respondents had **started to use** illegal sources in the last year. Those that had mentioned being recommended those sources by friends as a reason for using illegal sources to download/access video games.

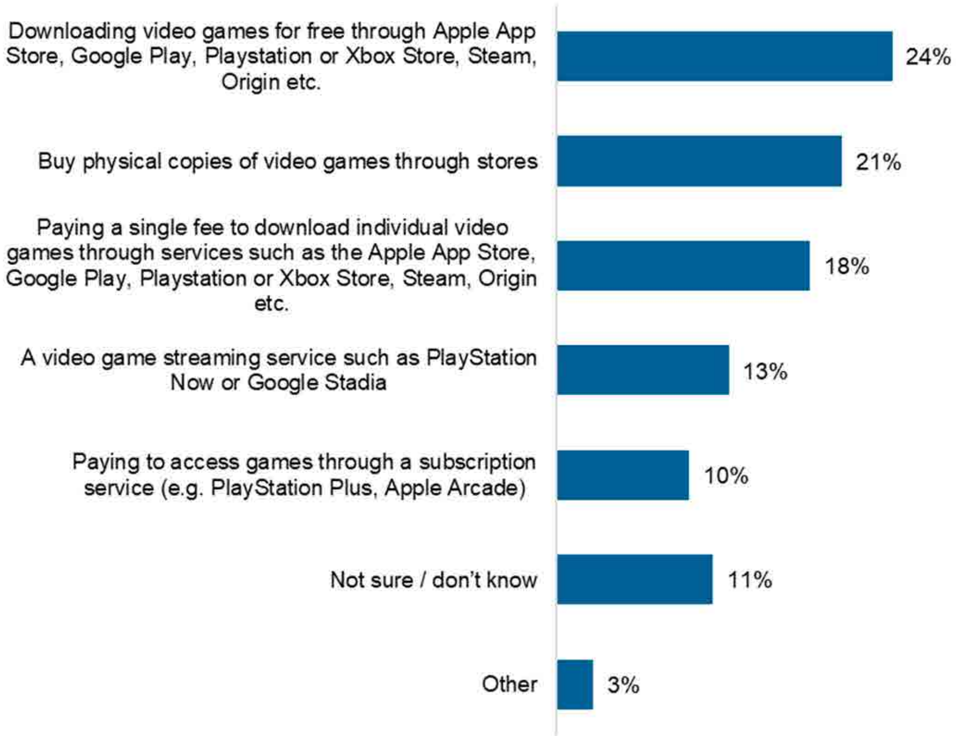
- *"I started using them due to recommendations from friends."* - Female, 16-24

Alternatives to infringement

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

- The most selected source was a free one with nearly a quarter saying they would download video games for free through Apple App Store, Google Play, Playstation or Xbox store, Steam, Origin etc. (24%). This was followed by the 21% who would buy physical copies of video games through stores.
- Paying a single fee to download individual games through Apple App Store, Google Play, Playstation or Xbox store, Steam, Origin etc. would be used by 18%, a video game streaming service by 13% and paying to access games through a subscription by 10%.
- Males were more likely than females to buy physical copies of video games (23% and 14% respectively) and to use a video game streaming service (14% and 7% respectively).
- Respondents aged 16-24 were more likely to consider “Buying physical copies of video games through stores” (37%) than “Downloading video games for free through Apple App Store, Google Play, Playstation or Xbox Store, Steam, Origin etc.” (23%) or “Paying a single fee to download individual video games” (9%). This contrasts with respondents of other age groups who were more likely to consider purchases via digital stores.
- Those aged 16-24 were also more likely to consider “A video game streaming service” (23%) and “Paying to access games through a subscription service” (23%) than those from other age groups.

E11. If video games were no longer available to download or stream via these sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
Downloading video games for free through Apple App Store, Google Play, Playstation or Xbox Store, Steam, Origin etc.	25%	22%	15%	23%	31%	20%	34%	23%
Buy physical copies of video games through stores	23%	14%	11%	37%	33%	4%	11%	0%
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.	18%	19%	20%	9%	13%	39%	0%	24%
A video game streaming service such as PlayStation Now or Google Stadia	14%	7%	15%	23%	3%	21%	0%	0%
Paying to access games through a subscription service (e.g. PlayStation Plus, Apple Arcade)	10%	8%	14%	23%	8%	15%	0%	0%
Not sure / don't know	11%	9%	20%	11%	0%	6%	16%	33%

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

Base: n=100 (streamed video games illegally)

Qualitative insights

When participants were asked to imagine the prospect of unofficial sources disappearing, most said this would not greatly bother them. More so than in other categories, participants who infringed in relation to video game content said they would almost feel relieved if this option were to be removed. The main reason participants said they accessed content via unofficial methods at all were down to cost and availability but there was a greater sense amongst gamers that illegal access was risky and morally questionable.

Despite assuming they would not be too disappointed, participants did feel there would be an effect on their consumption and that they would likely consume a little less video game content, due to the cost associated with purchasing games through official sources only.

- *"It would not really affect me because I like to buy or download video games from official sources, the unofficial free options have disadvantages and it is something that I do not always use. Many times I have used unofficial sources because the prices of the new video games are very expensive but if I could only use the official methods it would not be a problem."* - Male, 30
- *"If I could no longer access free video games, then I would pay a single fee for games on Google Play. They have a good selection of games, and they have a choice of types of games. I think I would download less games as I think I would only pay for the really good ones."* - Female, 35-44
- *"It will not be a major issue as it will be more ethical. I will not be too sad as I know free things are somewhat illegal. I would buy a few games and use more games which are freely available but would perhaps consume a little less content overall."* - Female, 25-34

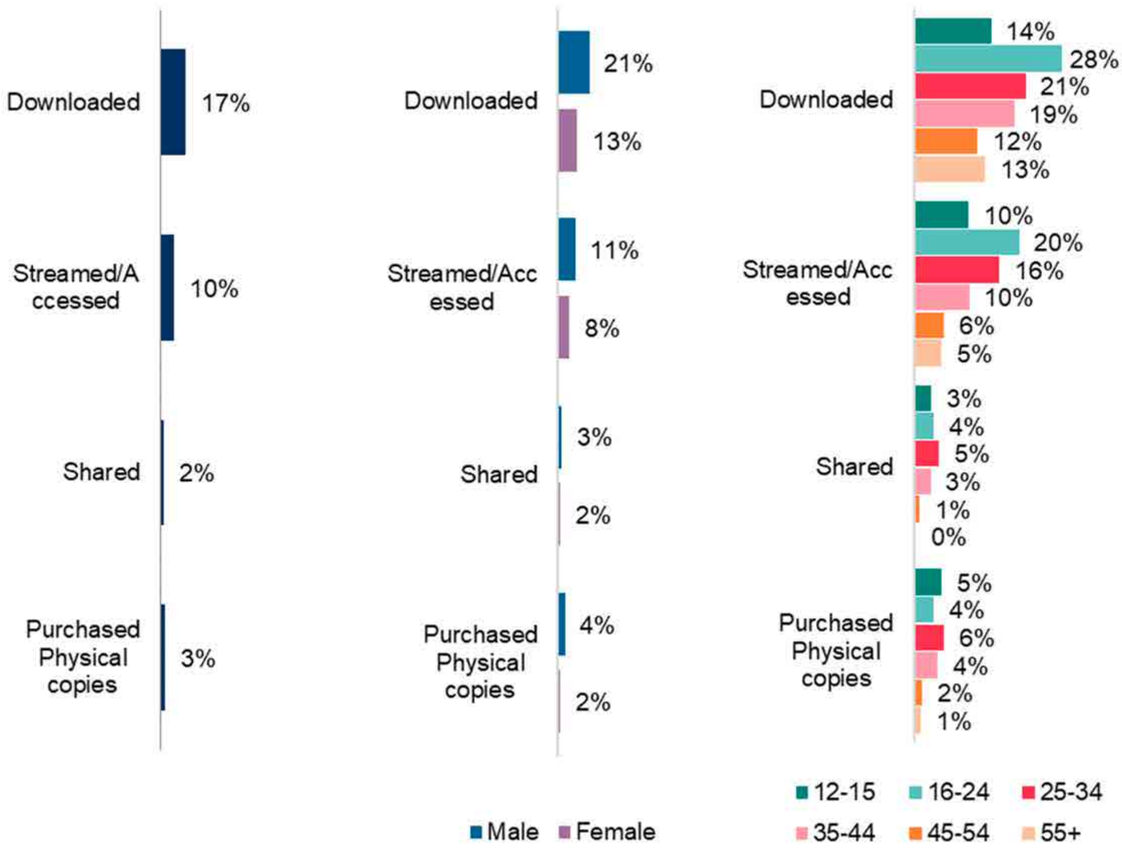
Software

Engaging with software

In the previous three months, 21% had engaged with software (i.e. either by downloading, streaming/accessing, sharing or purchasing physical products).

- Downloading was the most common method of accessing software, with 17% having done so. Streaming/accessing followed at 10% and 3% had purchased physical copies.
- Across downloading and streaming/accessing, male respondents were more engaged than females.
- 16-24 year olds were the most engaged with downloading and streaming/accessing when compared to both younger and older age groups. Similar proportions had made physical purchases across all age groups between 12-44.

F1. Have you downloaded/streamed/shared[1]/purchased physical copies of software in the past 3 months?



Base: n=5,000 (total sample)

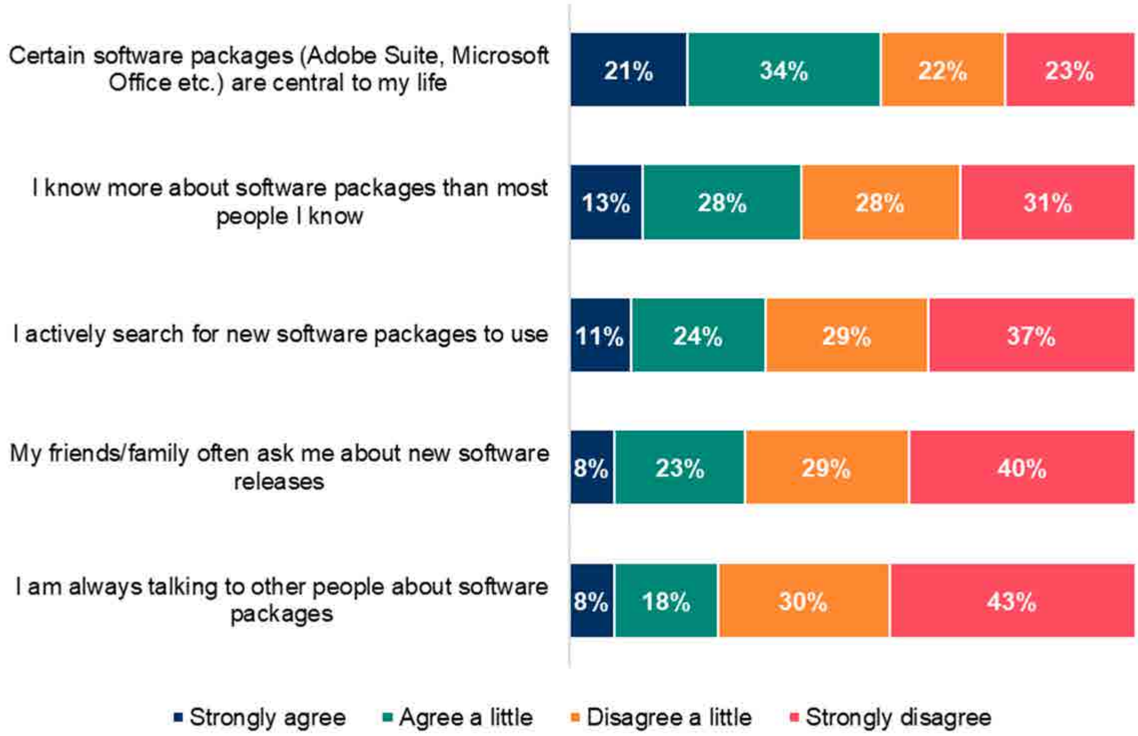
To get a broader sense of **their passion for software,** respondents were asked to what extent they agreed with

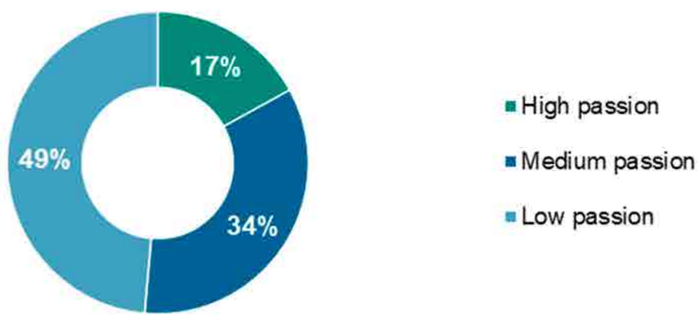
1 The definition of 'shared' was provided as: "By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated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

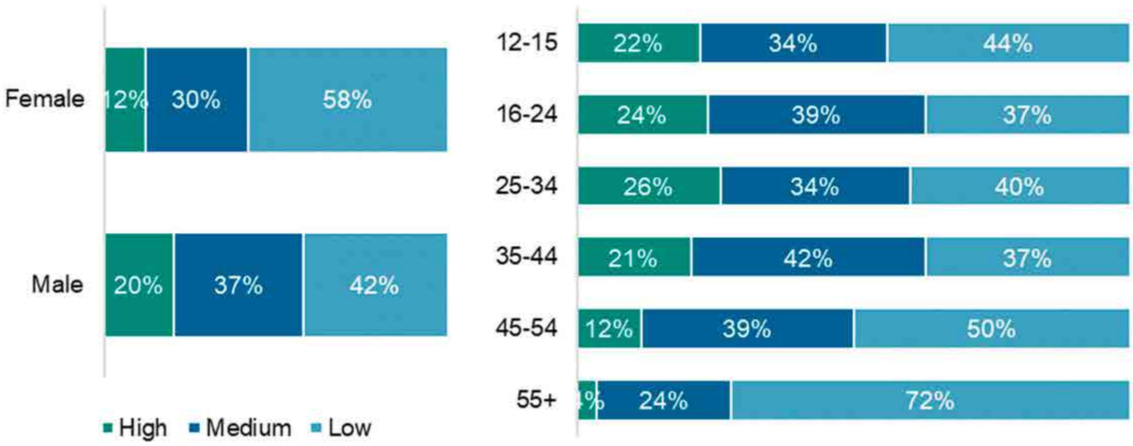
a range of statements and then grouped as High, Medium or Low, based on their responses.

- Just under a fifth (17%) displayed **high levels of passion for software.** This was, however, more apparent in those aged between 12-44, where between 21-26% had a high level 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; 55% felt that “Certain software packages (Adobe Suite, Microsoft Office etc.)” were central to their lives.

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







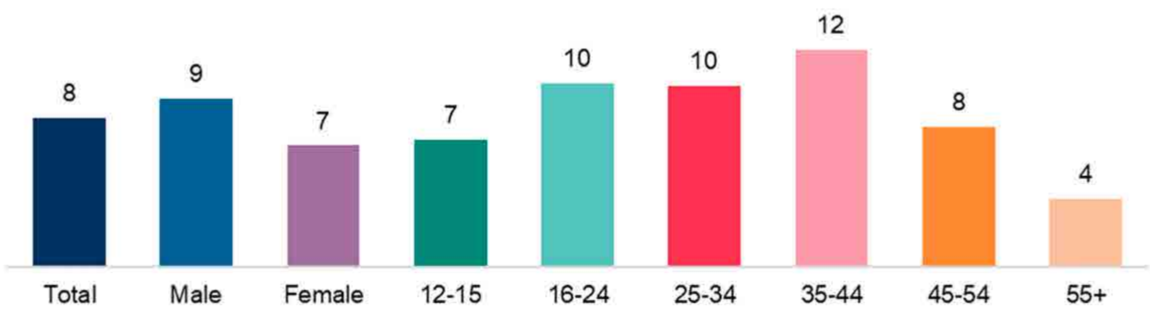
Base: n=1,040 (downloaded, streamed, shared and/or purchased physical copies of Software in the past 3 months)

Physical purchasing of software

The 3% of respondents who had purchased software in physical formats during the previous three months were asked about the number of purchases made.

- The average number of physical copies of software purchased in the previous 3 months was slightly higher for males (9) than females (7).
- Those aged 35-44 had purchased the most physical copies of software (12) with other age groups purchasing between 7-10, with the exception of the 55+ who had purchased 4.

F3. In the past 3 months how many physical software packages did you purchase? (Average purchases)



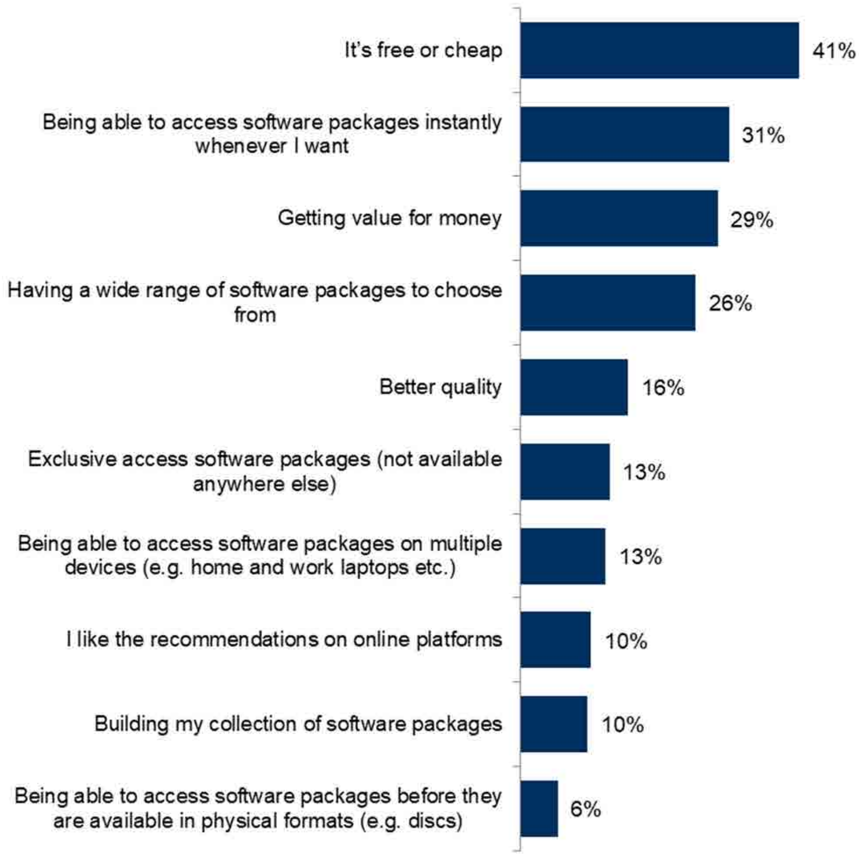
Base: n=965 (purchased physical copies of software packages in the past 3 months)

Understanding online consumption of software

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

- Cost, or a lack thereof, was the most popular reason for online access. The top reason, “It’s free or cheap” (41%), was selected by +10% more than the next highest reason. “Getting value for money” was the third most popular reason, selected by 29%.
- The second most popular reason related to convenience (“Being able to access software packages whenever I want”) and was selected by nearly a third (31%). The range of software available (“Having a wide range of software packages to choose from”) was also among the top reasons (25%).
- No other reason was selected by more than 16%.
- Across gender and most age groups, the same combination of top three reasons were selected: “It’s free or cheap”; “Being able to access software packages instantly whenever I want”; “Getting value for money”. The only exceptions were among the 16-24 and 35-44 age groups, both of whom selected “Having a wide range of software packages to choose from” above “Getting value for money”.

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 (%)



Male respondents	Female respondents
1. It's free or cheap (43%) 2. Getting value for money (32%) 3. Being able to access software packages instantly whenever I want (32%)	1. It's free or cheap (39%) 2. Being able to access software packages instantly whenever I want (30%) 3. Getting value for money (25%)
Aged 12-15	**Aged 16-24**
1. It's free or cheap (43%) 2. Being able to access software packages instantly whenever I want (31%) 3. Getting value for money (27%)	1. It's free or cheap (44%) 2. Having a wide range of software packages to choose from (32%) 3. Being able to access software packages instantly whenever I want (31%)
Aged 25-34	**Aged 35-44**
1. It's free or cheap (36%) 2. Getting value for money (31%) 3. Being able to access software packages instantly whenever I want (28%)	1. It's free or cheap (37%) 2. Being able to access software packages instantly whenever I want (33%) 3. Having a wide range of software packages to choose from (28%)
Aged 45-54	**Aged 55+**
1. It's free or cheap (44%) 2. Getting value for money (37%) 3. Being able to access software packages instantly whenever I want (33%)	1. It's free or cheap (45%) 2. Being able to access software packages instantly whenever I want (31%) 3. Getting value for money (28%)

Base: n=979 (downloaded or streamed/accessed software packages online in the past 3 months)

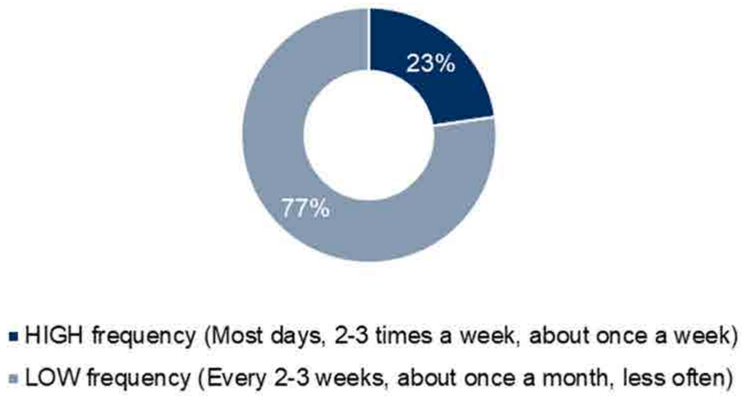
Downloading/accessing software

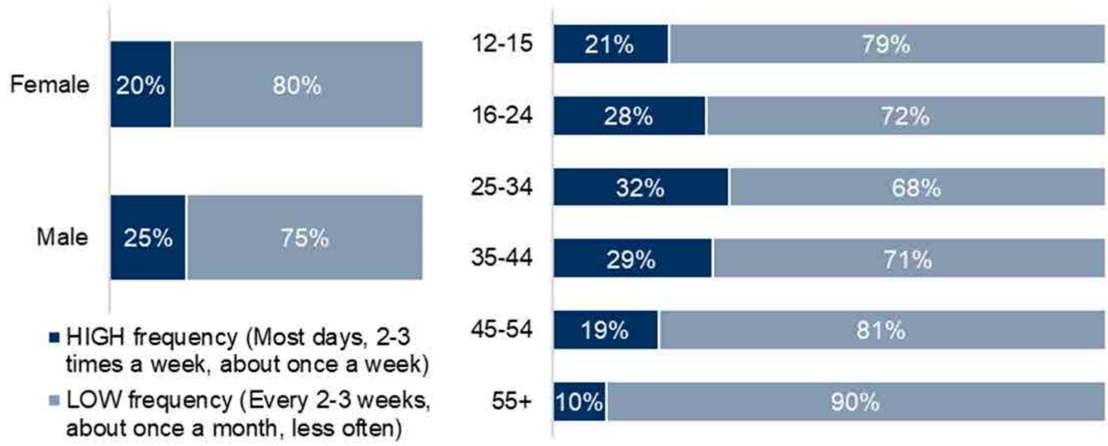
The 20% who had accessed software during the previous three months were asked questions around frequency, volume and sources used.

Frequency and volume of downloading/accessing software

- Around a quarter (23%) accessed software frequently (i.e. at least once a week).
- Weekly access was more common among males (25%).
- Accessing software frequently (i.e. at least once a week) was most common in those aged 16-44 (28-32%). This was followed by those aged 12-15 (21%), 45-54 (19%) and 55+ (10%).
- An average of 8 software packages had been accessed during the past three months.
- Those aged between 35-44 had downloaded the highest number of software packages (12) with all others aged 12-34 and 45-54 downloading between 7-10. This dropped to 4 for those aged 55+.

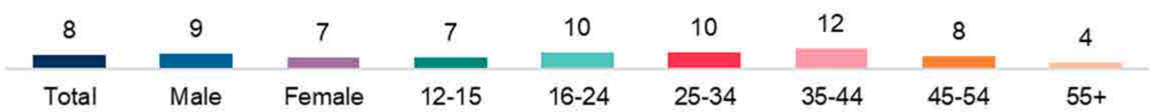
F5. Generally, how often do you download/access software packages through the internet? (%)





Base: n=979 (downloaded/accessed software in the past 3 months)

F6. In the past 3 months how many software packages did you download/access through the internet? (average number of downloads)



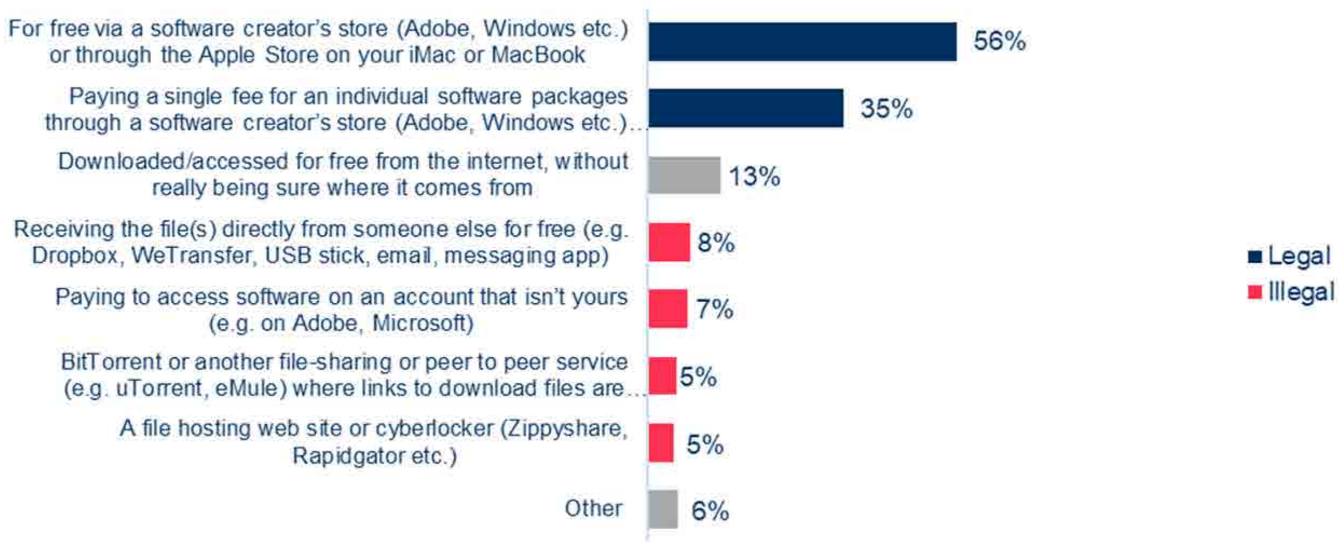
Base: n=965 (downloaded/accessed software in the past 3 months)

Sources of downloading/accessing software

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

- **The two most used sources by far for accessing software were legal.** More than half accessed software via a software creator's store (56%) and by paying a single fee to download individual software packages (35%).
- All illegal sources were used by smaller proportions (5-8%).
- The most commonly used illegal source was receiving the file from someone else for free (8%), followed by paying to access software on an account that isn't yours (7%).
- Females were more likely to receive the file from someone else for free than males (10% and 6% respectively).
- Those aged between 12-24 were more likely to pay to access software on an account that isn't theirs (13-15%) compared to older age groups (2-9%).
- Use of BitTorrent or another file sharing or peer-to-peer service was higher among 35-44 year olds (11%) compared to other age groups (1-8%).

F7. Which of the following have you used to download software in the past 3 months? Please select all that apply. (%)



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
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	39%	31%	35%	41%	47%	39%	36%	21%
For free via a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	59%	51%	50%	64%	50%	55%	56%	58%
A file hosting web site or cyberlocker (Zippyshare, Rapidgator etc.)	6%	3%	5%	7%	7%	8%	0%	1%
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent, eMule) where links to download files are typically available on sites such as The Pirate Bay, Torrent, or Rarbg	6%	4%	8%	3%	8%	11%	3%	1%
Receiving the file(s) directly from someone else for free (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	6%	10%	7%	10%	8%	9%	9%	5%
Paying to access software on an account that isn't yours (e.g. on Adobe, Microsoft)	7%	7%	15%	13%	4%	9%	2%	4%
Downloaded/accessed for free from the internet, without really being sure where it comes from	14%	13%	11%	11%	13%	9%	18%	17%

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

Base: n=979 (downloaded/accessed software during the past 3 months)

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

Those unsure of the source of the software packages they had downloaded/accessed were asked to explain more in their own words about how they obtained them.

When downloading software from unknown sources, most started by looking for a trustworthy link to their desired software. For some, this was simply combing through results for a download link on a search engine, while others spent time researching a free, but safe, means of obtaining software on online forums or video sites such as YouTube.

Legality of downloading/accessing software packages online

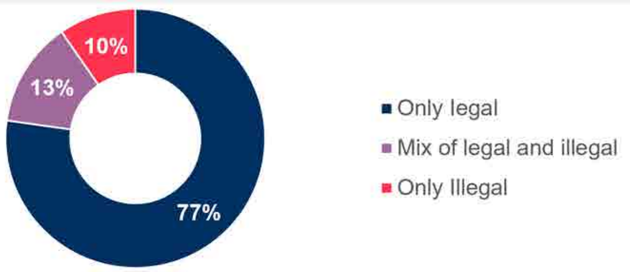
To better understand the distribution of sources across legal and illegal categories, those who had accessed software in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only; illegal sources only; or a mix of the two.

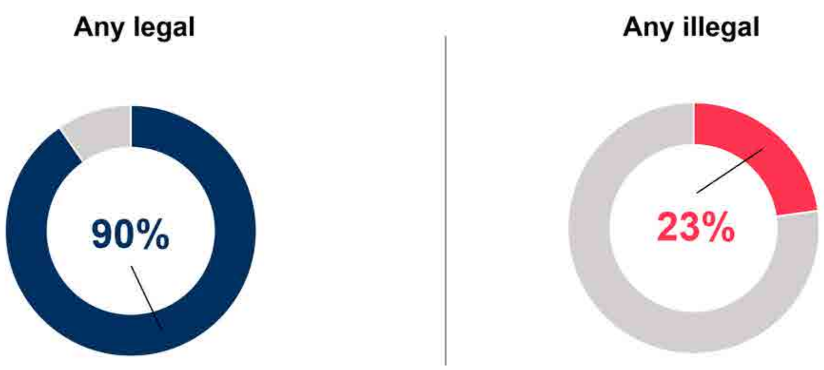
The answer option "download for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they only consumed content in this way was not included in the base.

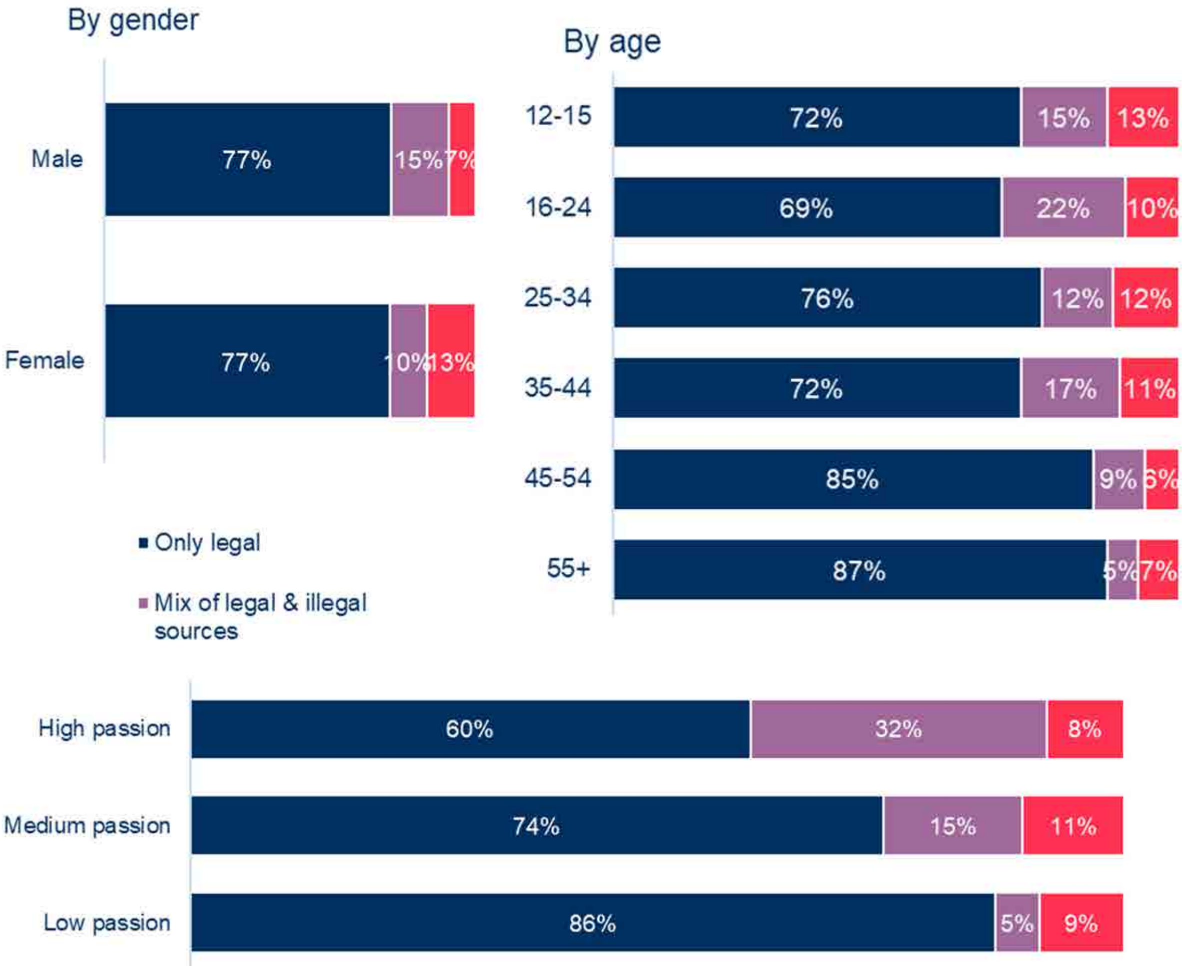
- Legal Sources:
  - Overall, 90% had used at least one legal source to access software.

- The highest proportion (77%), around three quarters, had used only legal sources.
- Between 85-87% of those aged 45 or older used only legal sources. In all other age groups this was between 69-76%.

- Illegal Sources:
  - 23% had used at least one illegal source to access software.
  - 10% had only used illegal sources.
  - 13% of female respondents had used only illegal sources to access software compared to 7% of males.
  - The proportion who had used illegal sources was highest among those aged 16-24, of whom nearly a third (32%) had done so. Those aged 45 or over were less likely to have used an illegal source. 15% of 45-54 year olds, and 12% of those 55+ had done so compared to younger age groups (24-32%).
  - 40% of those with a high passion for software had used an illegal source to access/download, far more than those with a medium (26%) or low level (14%).
- Mixed:
  - 13% had used a mix of legal and illegal sources to access software.
  - This was higher among males (15%) compared to females (10%), and those aged 16-24 (22%).







Base: n=855 (downloaded/accessed 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/access software typically split across the following sources? (average % of their time and average number of downloads)

Legality	Source	Average % of usage split
Legal	For free via a software creator's store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	45%
	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	27%
Illegal	Paying to access software on an account that isn't yours (e.g. on Adobe, Microsoft)	4%
	Receiving the file(s) directly from someone else for free (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	4%
	BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent, eMule) where links to download files are typically available on sites such as The Pirate Bay, Torrentz, or Rarbg	3%
	A file hosting web site or cyberlocker (Zippyshare, Rapidgator etc.)	2%
Other	Download/access for free from the internet, without really being sure where it comes from	10%
	Other	5%

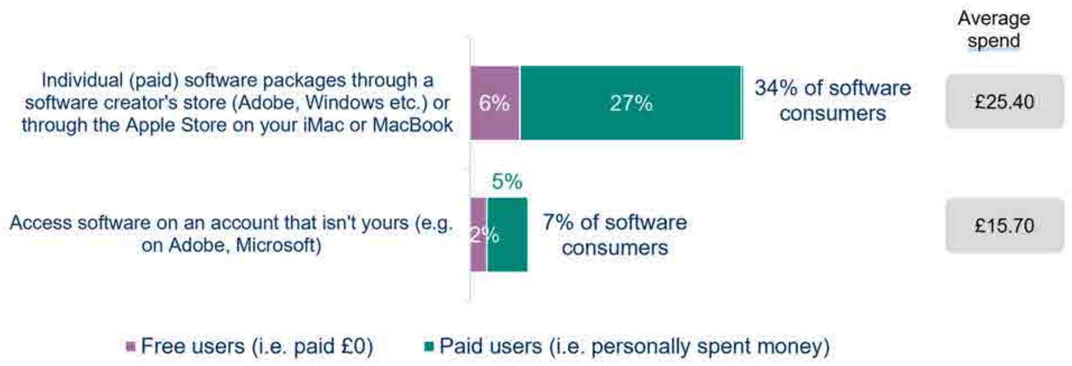
Base: n=979 (downloaded/accessed software in the past 3 months)

Paying for software

Those who had used a paid source to access/download software were asked how much they had personally spent on each source on a monthly basis.

- Around a third (34%) of software consumers said they had used **an individual (paid) software package through a software creator's store** during the previous three months, with most making a personal contribution towards a subscription (27% of total software consumers). They spent, on average, £25.40 each month.
- A smaller proportion (7%) of consumers had accessed software through a paid illegal option ("access software on an account that isn't yours") during the previous three months, with around half of those (5% of total software consumers) having paid to do so each month. They spent, on average, a bit more than half of that spent on the legal paid option (£15.70 each month).

F9. Approximately how much do you personally spend each month on the below sources of streaming or downloading software? (Proportion of software consumers over past three months using a paid source and average amount spent each month by users of that source)



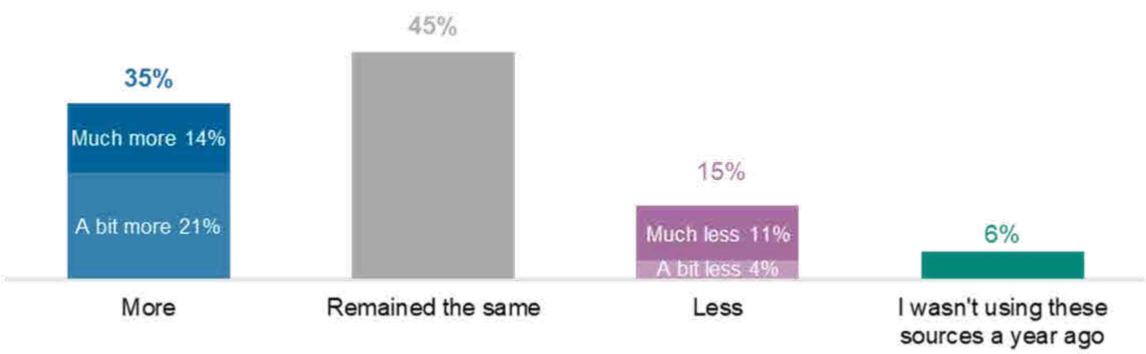
Base: n=979 (streamed/accessed and/or downloaded software), n=23-376 (those who used each of the sources to stream/access software)

Change in use of illegal sources

Those who had used an illegal source to download or access software were asked how their use of these sources compares to the same point a year ago.

- The greatest proportion (45%) of respondents said that their use of illegal sources had remained the same.
- For over a third (35%) usage had increased.
- For a relatively small number, usage had decreased (15%) or they weren't using these sources a year ago (6%).

F10. You said you download or access software using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=184 (downloaded and/or accessed software illegally)

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

Many of those who had used illegal sources **more** in the last year did so as a result of changes in their life due to COVID-19. For some, this was as simple as having more time at home to both look for and use software packages. Others, however, felt their increased usage was out of necessity as they needed the packages to be able to work from home, with some having lost access to such software they had previously been able to use through their company or university.

- *“I have been using them more because of school. I use them to submit my work due to COVID-19 - everything we do is on paid platforms such as Microsoft.’* - Female, 12-15
- *“I need the software packages more to work from home.”* - Female, 16-24
- *“Since lockdown, I have more time to look for and use software than before.”* - Female, 25-34

Those who had used illegal sources **less** in the last year tended to do so out of a lack of need for new software. Some already had downloaded all the software packages that they found useful, while others had their life circumstances change in the last year, or no longer had an interest in software.

- *“I lost interest in downloading new software in the past year.”* - Male, 25-34
- *“Because I am spending more time doing other activities like watching TV rather than downloading and installing new software.”* - Male, 55+
- *“Because I don’t need any software presently, I would use the source when a need for a particular software arose.”* - Male, 25-34

Those who began to use illegal sources in the last year tended to do so out of necessity. For most, this was related to COVID-19 and needing to work from home. This was especially prominent among those in education, with multiple students mentioning the need to download software for their education.

- *“I needed new software due to COVID-19.”* - Male, 12-25
- *“I needed to download software for my online education.”* - Female, 16-24
- *“Because I needed to use specific software for my education.”* - Male, 16-24

Alternatives to infringement

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

- The top source was a free one, “For free via a software creator’s store or through the Apple store”, selected by 39%.
- Over a quarter (28%) said they would “Pay a single fee via a software creator’s store or through the Apple store”.
- Female respondents were more likely to consider accessing software “For free via a software creator’s store or through the Apple store” (47%) or “Pay a single fee via a software creator’s store or through the Apple store” (32%) compared to males (34% and 26% respectively). On the other hand, males were more likely to consider “Buying physical copies through stores” (24%) compared to females (8%).
- Respondents aged 25-34 were nearly as likely to consider “Buying physical copies through stores” (33%) as accessing software “For free via a software creator’s store or through the Apple store” (34%).
- More than half of those aged 45-54 and 55+ would consider accessing software “For free via a software creator’s store or through the Apple store” (52% and 52% respectively) compared to the younger age groups (28-38%).
- More than a third (35%) of 12-15 year olds didn’t know what they would do.

F11. If software was 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 +
For free via a software creator’s store (Adobe, Windows etc.) or through the Apple Store on your iMac or MacBook	34%	47%	28%	38%	34%	38%	52%	51%
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	26%	32%	19%	35%	26%	30%	34%	18%
Buy physical copies of software through stores	24%	8%	17%	8%	33%	21%	0%	15%
Not sure / don’t know	15%	12%	35%	17%	7%	11%	7%	15%
Other	1%	1%	0%	2%	0%	0%	7%	0%

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

Base: n=184 (downloaded and/or accessed software illegally)

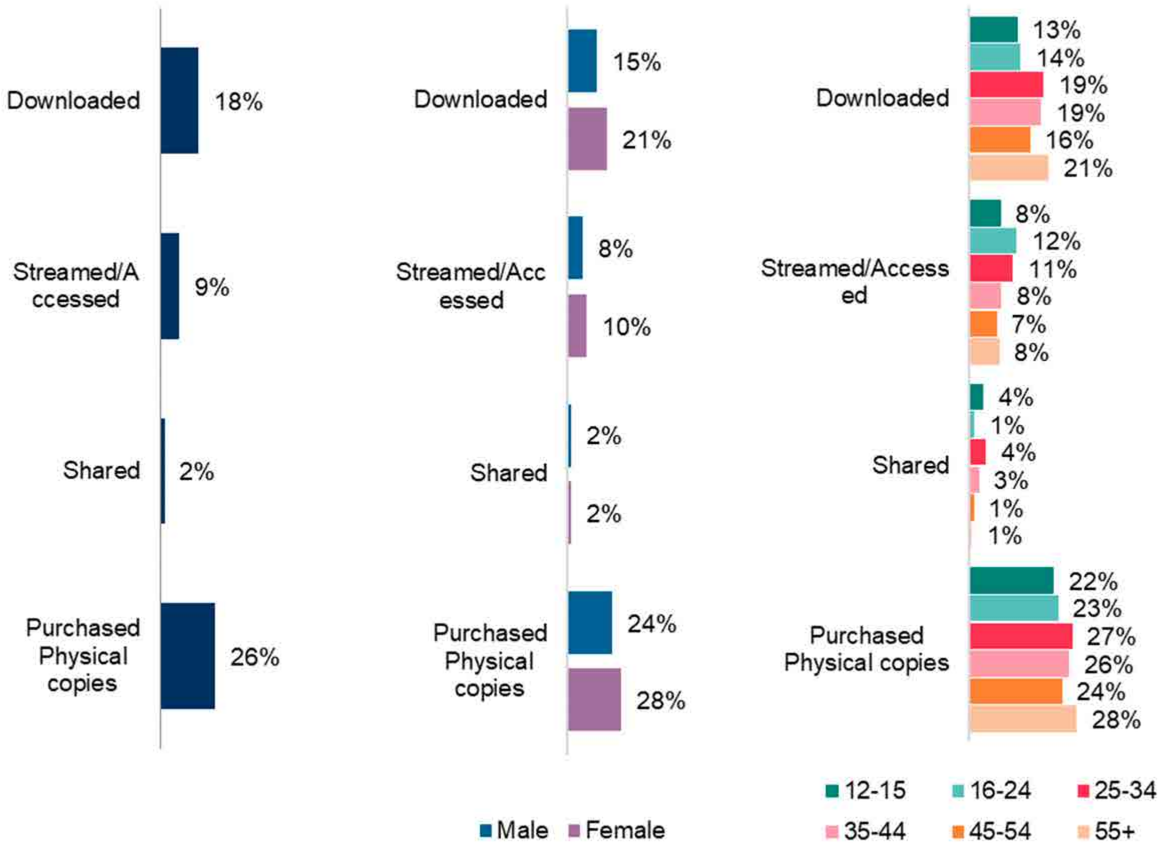
E-books

Engaging with e-books

38% had engaged with books/e-books in the previous 3 months (either by downloading, streaming or sharing e-books, or purchasing physical copies).

- The **most common method of access was purchasing physical copies** (26%).
- This was followed closely by downloading (28%) and then streaming online (8%).
- Purchasing physical copies of books was evenly distributed across all age groups where it ranged from 22-28%.

G1. Have you downloaded/streamed/shared[1]/purchased physical copies of e-books in the past 3 months?



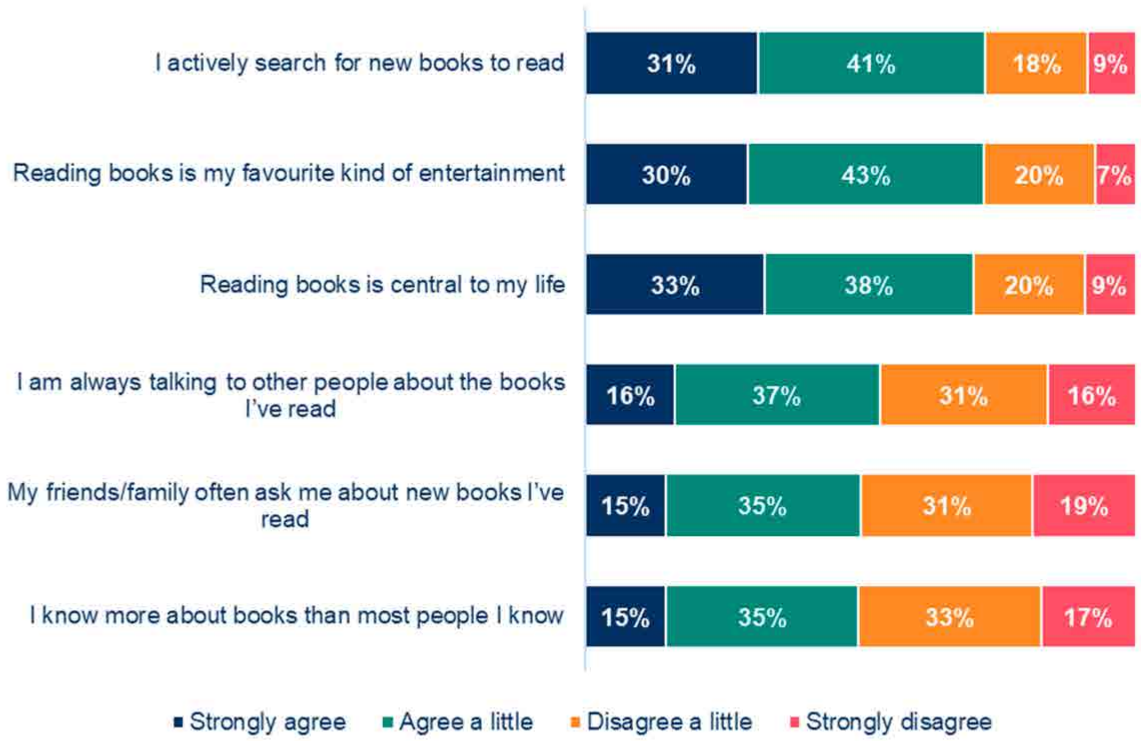
Base: n=5,000 (total sample)

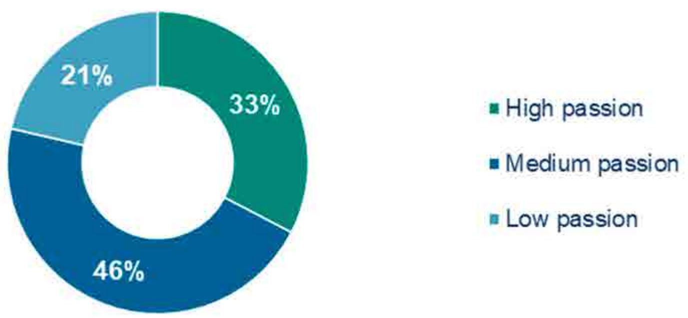
1 The definition of 'shared' was provided as: "By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated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

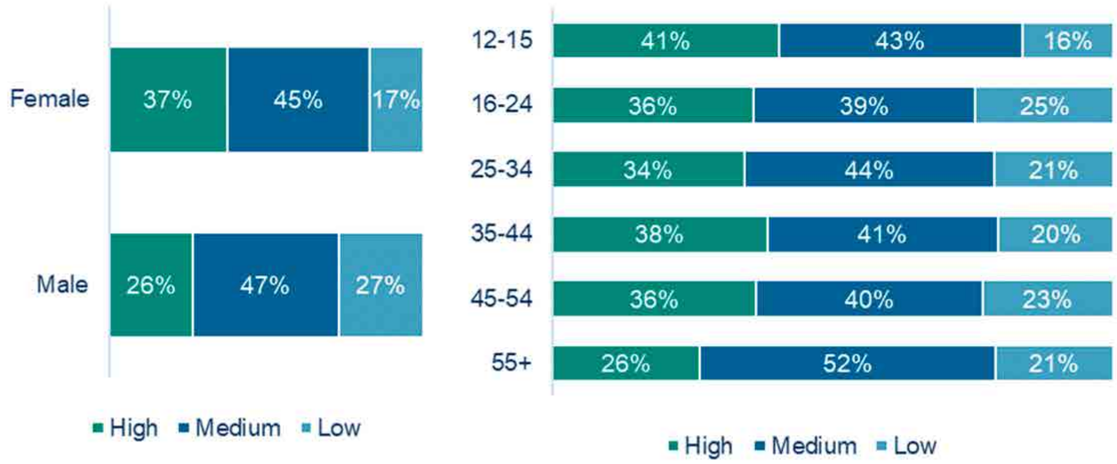
To get a broader sense of **their passion for books/e-books,** respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

- Approximately a third (36%) displayed **high levels of passion for books/e-books.**
- Those with a high level of passion were more likely to be female (37%, which is 11% higher than male respondents).
- Books/e-books were a source of passion for a number of people. Respondents were most likely to **search for new reading material** ("I actively search for new books to read" at 73%), to consider books/e-books their **main source of entertainment** ("Reading to books is my favourite kind of entertainment" at 72%) or to believe books/e-books play a **crucial role in their lives** ("I actively search for new books to read" at 70%).

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







Base: n=1,929 (downloaded, streamed, shared and/or purchased physical copies of publications in the past 3 months)

Qualitative insight

During the past year, reading had played an important role for some participants but others said that e-books had not played a bigger role than usual for them during the various lockdowns and that they had read a similar amount to before the pandemic.

For some, e-books played an important role as part of a wider reading repertoire, particularly in evenings during the past year when participants wanted to relax and found reading had a calming and comforting effect. Others said that whilst reading was still something they enjoyed doing, other entertainment categories had helped them through lockdown more, such as TV, films, video games etc., partly due to the ease and effortless consumption of screen-based activities.

- *"I feel that my reliance on books and reading grew in the lockdowns as a coping mechanism for my mental and emotional health. I am still accessing books the same amount now because this helps me have a sense of continuity going forward."* - Male, 45-54

- *"I do think reading did help with the lockdown, it was nice to not think about things. When I was furloughed I still got up at the same time as when I was working and if I am honest, I felt guilty being at home. So most days, I worked on jobs around the house or in the garden from 9.00 to 5.00, and then when I relaxed in the evenings, reading was one of the main things I did."* - Male, 45-54

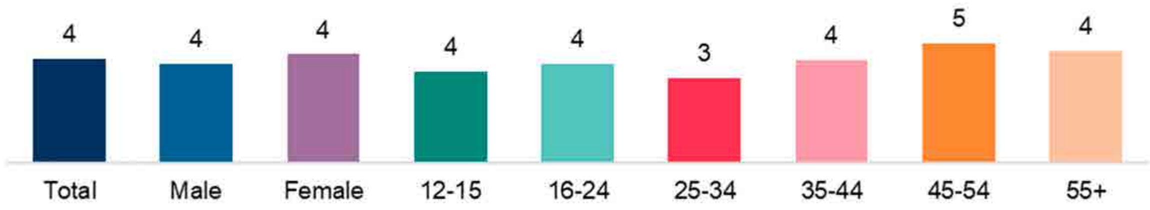
- *"I have probably been reading once a week, either in the afternoon or evening. I didn't really feel reliant on books, definitely my main source of entertainment was watching TV series. Therefore, even with the restrictions being lifted I am reading the same as I was before."* - Female, 25-34

Physical purchasing of books

The 26% of respondents who had purchased physical copies of books during the previous 3 months were asked a question around the number of purchases made.

- Respondents had purchased an average of 4 books over the past three months. This was the case for all genders and age groups with the exception of those aged 25-34 (who had purchased 3) and those 45-55+ (who had purchased 5).

G3. In the past 3 months how many physical books did you purchase? (Average purchases)



Base: n=1,309 (purchased physical copies of books in the past 3 months)

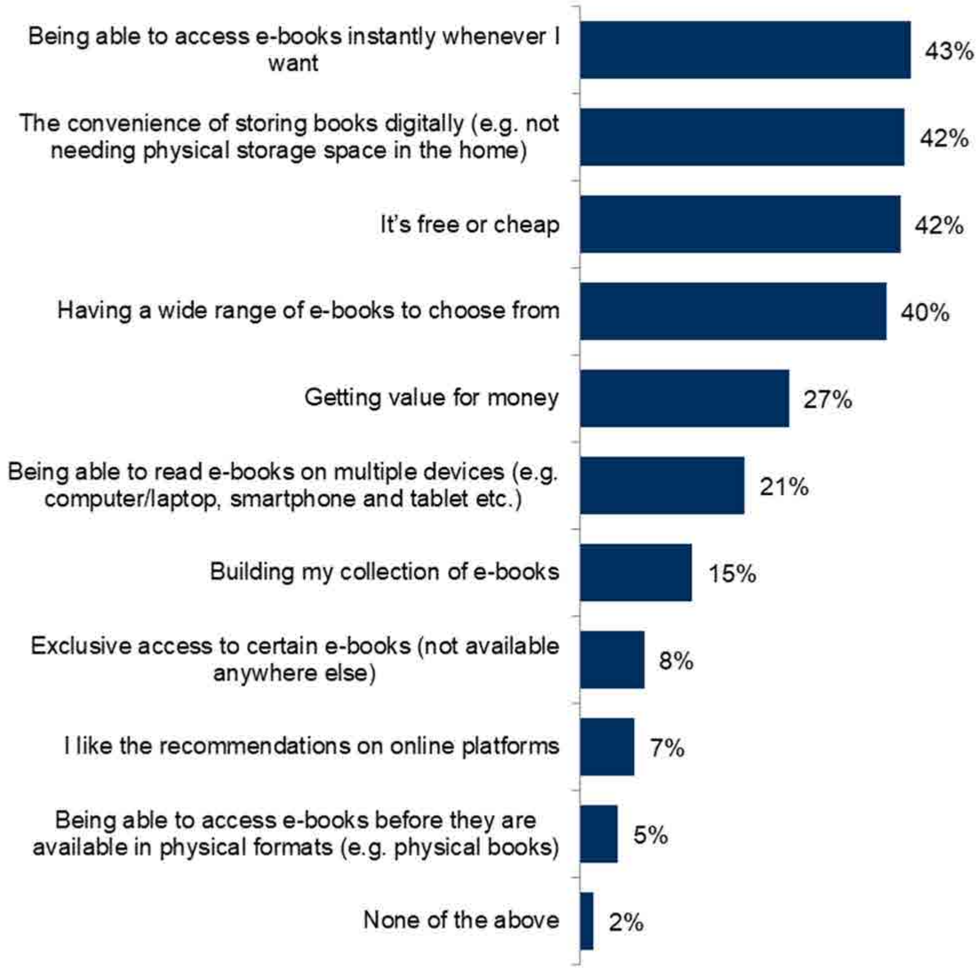
Understanding online consumption of e-books

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

- Four diverse factors emerged as important to online consumption of e-books and were each selected by around four in ten respondents. These included **ease of access** ("being able to access e-books instantly whenever I want" 43%), being **easy to store** ("the convenience of storing books digitally" 43%), **low cost** ("it's free or cheap" 42%) and **variety** ("having a wide range of e-books to choose from" 40%).

- Another factor relating to price ("getting value for money") was selected by 27% with nothing else selected by more than 15% of respondents.

G4. What are the main reasons that you choose to access e-books online (i.e. downloading or streaming) Please select your top 3 (%)



Base: n=1,052 (downloaded or accessed e-books online in the past 3 months)

Male respondents	Female respondents
1. It's free or cheap (41%) 2. The convenience of storing books digitally (e.g. not needing physical storage space in the home) (40%) 3. Having a wide range of e-books to choose from (38%)	1. Being able to access e-books instantly whenever I want (47%) 2. The convenience of storing books digitally (e.g. not needing physical storage space in the home) (44%) 3. It's free or cheap (42%)
Aged 12-15	**Aged 16-24**
1. Getting value for money (41%) 2. Having a wide range of e-books to choose from (34%) 3. It's free or cheap (34%)	1. It's free or cheap (48%) 2. Being able to access e-books instantly whenever I want (41%) 3. The convenience of storing books digitally (e.g. not needing physical storage space in the home) (41%)
Aged 25-34	**Aged 35-44**
1. The convenience of storing books digitally (e.g. not needing physical storage space in the home) (40%) 2. Being able to access e-books instantly whenever I want (39%) 3. It's free or cheap (36%)	1. Having a wide range of e-books to choose from (46%) 2. It's free or cheap (37%) 3. Being able to access e-books instantly whenever I want (35%)
Aged 45-54	**Aged 55+**
1. Having a wide range of e-books to choose from (49%) 2. It's free or cheap (45%) 3. The convenience of storing books digitally (e.g. not needing physical storage space in the home) (44%)	1. Being able to access e-books instantly whenever I want (51%) 2. The convenience of storing books digitally (e.g. not needing physical storage space in the home) (48%) 3. It's free or cheap (44%)

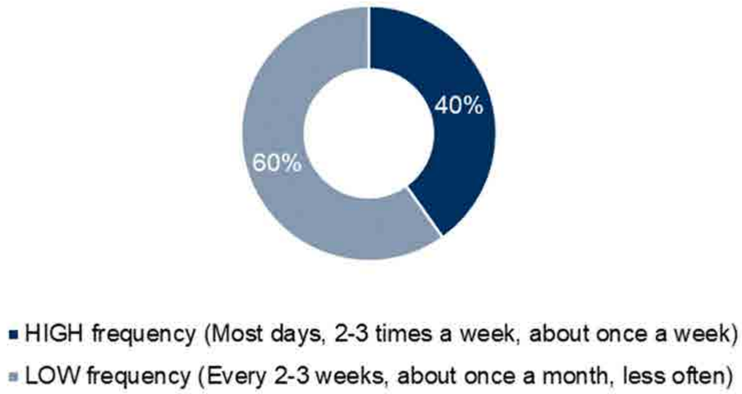
Downloading/accessing e-books

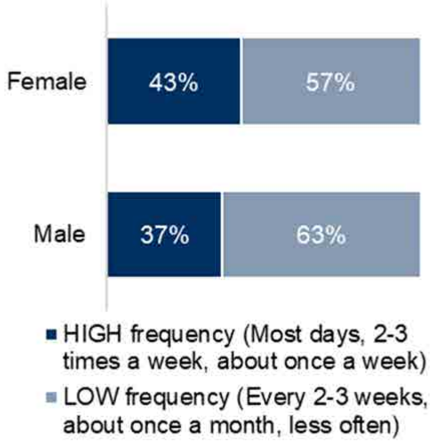
The 21% who had downloaded/accessed e-books during the previous 3 months were asked more questions around frequency, volume and sources used.

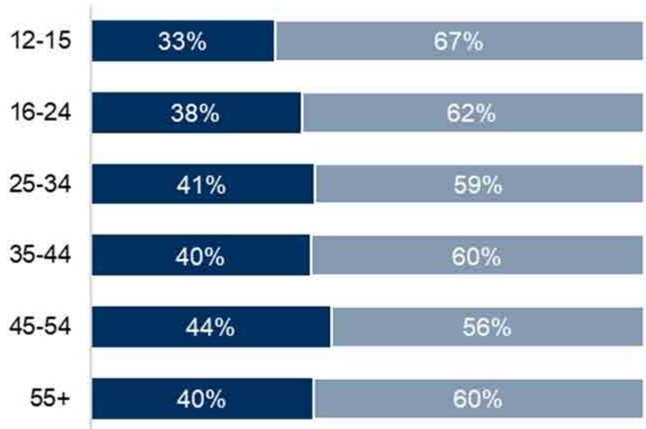
Frequency and volume of downloading/accessing e-books

- Four in ten (40%) of those who downloaded/accessed e-books did so frequently (i.e. at least once a week).
- Female respondents were more likely to be frequent (i.e. at least once a week) consumers of e-books, with 43% doing so (6% higher than male respondents).
- Over a three-month period, e-book consumers downloaded/accessed an average of 17 e-books. This was higher in females (18 e-books) than it was in males (14 e-books).

G5. Generally, how often do you download/access e-books through the internet? (%)

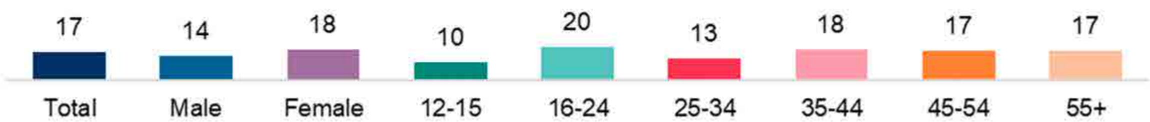






Base: n=1,052 (downloaded or accessed e-books in the past 3 months)

G6. In the past 3 months how many e-books did you download/access through the internet? (average number of downloads)



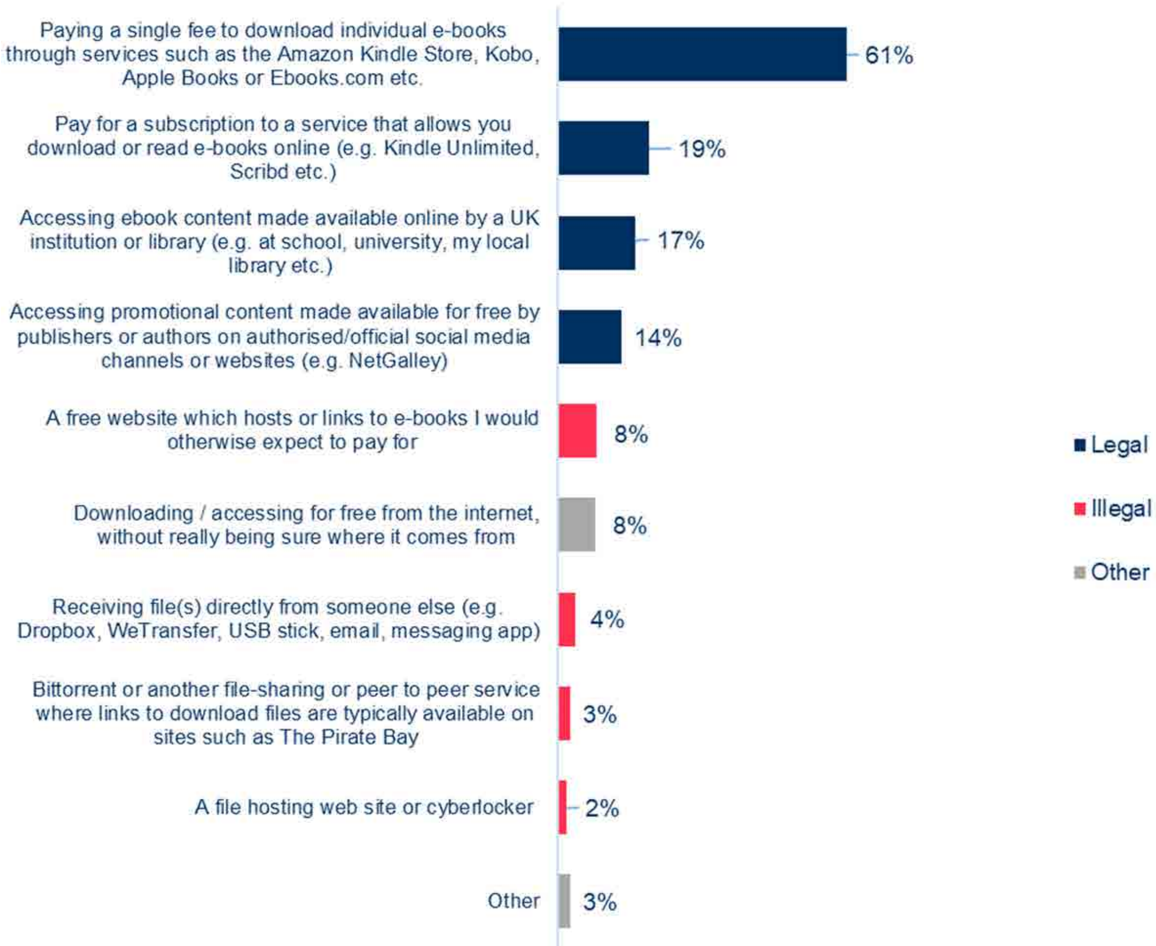
Base: n=1,031 (downloaded or accessed e-books in the past 3 months)

Sources of downloading/accessing e-books

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

- The most commonly used sources were **legal** ones. The most popular, by a considerable margin, was “Paying a single fee to download individual e-books through services such as the Amazon Kindle Store” (61%).
- This was followed by “Pay for a subscription to a service that allows you download or read e-books online” (19%), “Accessing content made available online by a UK institution or a library” (15%) and “Accessing content made available for free by publishers on their own social media or website” (21%).
- The most used illegal source was “a free website which hosts or links to e-books I would otherwise expect to pay for” (9%). No other illegal source was selected by more than 4%.

G7. Which of the following have you used to download/access e-books in the past 3 months? Please select all that apply. (%)



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
Paying a single fee to download individual e-books through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks.com etc.	61%	61%	63%	52%	55%	62%	63%	65%
Pay for a subscription to a service that allows you download or read e-books online (e.g. Kindle Unlimited, Scribd etc.)	21%	19%	30%	18%	24%	25%	18%	15%
Accessing promotional content made available for free by publishers or authors on authorised/official social media channels or websites (e.g. NetGalley)	13%	14%	7%	18%	15%	13%	12%	14%
A file hosting web site or cyberlocker	2%	2%	6%	6%	3%	3%	1%	0%
Bittorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay	4%	2%	5%	2%	4%	8%	1%	1%
Receiving file(s) directly from someone else (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	4%	4%	8%	9%	6%	4%	3%	1%
A free website which hosts or links to e-books I would otherwise expect to pay for	8%	9%	5%	7%	11%	13%	6%	7%
Accessing e-book content made available online by a UK institution or library (e.g. at school, university, my local library etc.)	14%	18%	11%	32%	17%	18%	13%	14%
Downloading / accessing for free from the internet, without really being sure where it comes from	9%	7%	6%	15%	9%	6%	11%	5%

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

Base: n=1,052 (downloaded or accessed e-books during the past 3 months)

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

Those unsure of the source of the e-books they had downloaded/accessed were asked to explain more in their own words about how they obtained them.

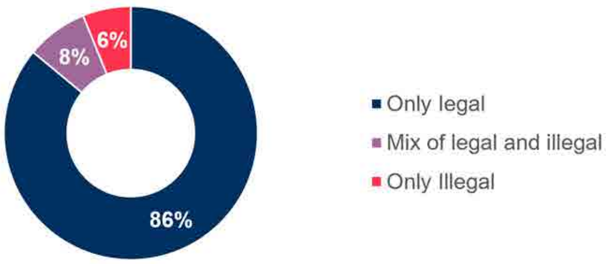
Most of those who had downloaded/accessed e-books from unknown sources did so through a search engine. Among these, a common method was to search for a PDF version of the e-book that they wanted to read. Multiple respondents also expressed that they had little difficulty finding e-books through this method, and that they usually found a free copy shortly after making their search.

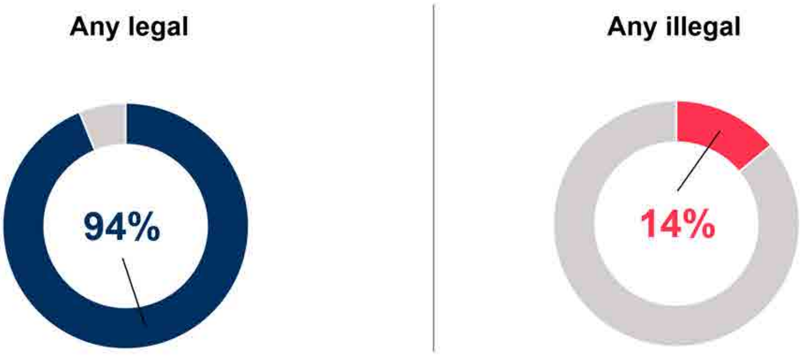
Legality of downloading/accessing e-books

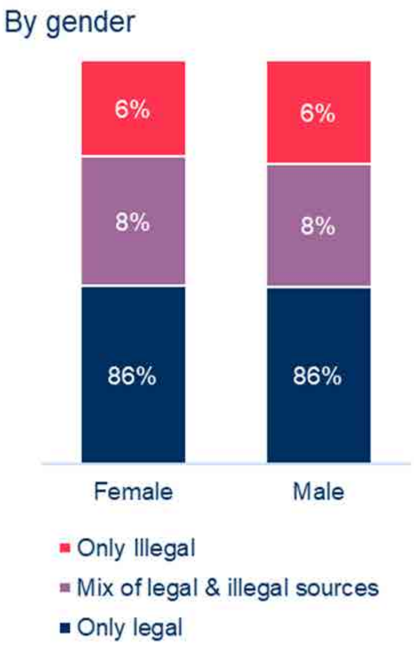
To better understand the distribution of sources across legal and illegal categories, those who had accessed e-books in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only; illegal sources only; or a mix of the two.

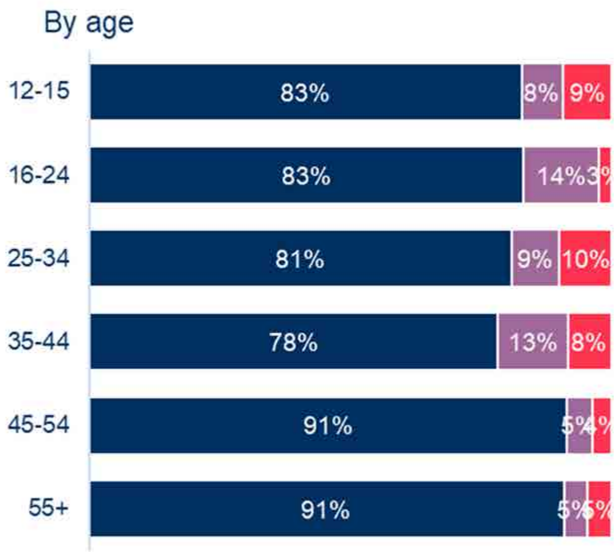
The answer option "downloading/accessing for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they only consumed content this way was not included in the base.

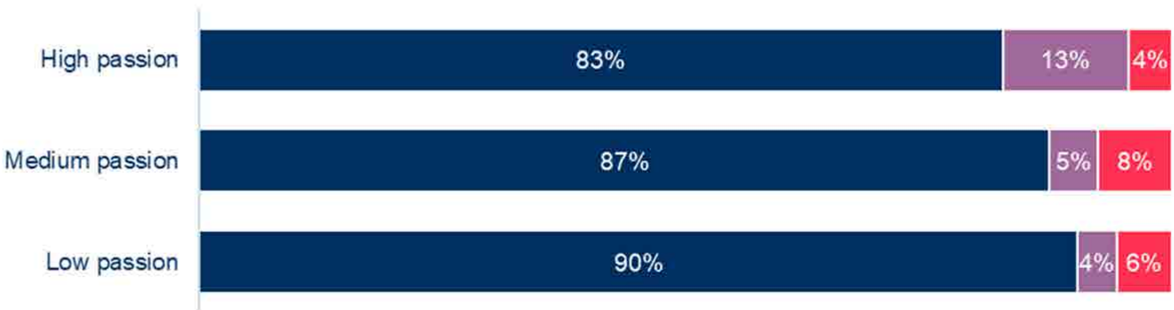
- Legal:
  - Overall 94% had used at least one legal source to access e-books
  - **86%** had used legal sources only.
  - Use of only legal sources was higher in those aged 45+ (91%) than it was in younger age groups where it ranged between 78-83%.
- Illegal:
  - **14%** had used at least one illegal source to download/access e-books.
  - **6%** had used illegal sources only to download/access e-books.
- Mixed:
  - **10%** had used a mix of legal and illegal sources.











Base: n=989 (downloaded/accessed e-books in the past 3 months, with those who selected ‘other’ or ‘not sure of source’ removed).

G8. And how is the way you download/access e-books typically split across the following sources? (average % of their time and average number of downloads)

Legality	Source	Average % of usage split
Legal	Paying a single fee to download individual e-books through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks.com etc.	51%
	Pay for a subscription to a service that allows you download or read e-books online (e.g. Kindle Unlimited, Scribd etc.)	15%
	Accessing promotional content made available for free by publishers or authors on authorised/official social media channels or websites (e.g. NetGalley)	7%
	Accessing e-book content made available online by a UK institution or library (e.g. at school, university, my local library etc.)	10%
Illegal	A file hosting web site or cyberlocker (Zippyshare, Rapidgator etc.)	1%
	Bittorrent or another file-sharing or peer to peer service (e.g. uTorrent, eMule) where links to download files are typically available on sites such as The Pirate Bay, Torrentz, or Rarbg	2%
	Receiving file(s) directly from someone else (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	1%
	A free website which hosts or links to e-books I would otherwise expect to pay for (e.g. sites such as z-lib.org, libgen.li, chomikuj.pl)	5%
Other	Downloading/accessing for free from the internet, without really being sure where it comes from	6%
	Other	3%

Base: n=1,052 (downloaded/accessed e-books in the past 3 months)

Qualitative insight

In terms of access to e-books via unofficial methods, the most common sources mentioned during the Online Community were BitTorrents, receiving USB or Dropbox links to downloadable files of e-books as well as websites hosting free links to e-books. The popularity of these methods was down to the appeal of free content and being able to access e-books which they were unable to find via official sources such as Amazon.

A few mentioned risks of viruses or malware when downloading files from the internet but, for most, the benefits of free content and wider access to whatever e-book they wanted outweighed these risks.

More so than with other categories, participants found it difficult to tell official and unofficial sources of e-books apart or seemed to have misunderstood what constituted legal or illegal activity in relation to accessing e-books online. This meant that some participants who preferred accessing legal copies of e-books out of principle couldn't be sure that they were accessing content from legitimate sources.

- *"I receive links via Dropbox and USBs and via free links on the internet. I would normally only share books via USB if I am allowed to do so. I do use some sites that offer free publications, but they must be genuine. I can never be 100% sure I am accessing something legal. If I ever get a security warning with a download I don't go ahead. I feel I can't do much more to do the right thing, but I know it is not foolproof."* - Male, 45-54

- *"I am sorry to say that I do get a lot of books via BitTorrent sites, I know this is not beneficial for the authors, but on a limited income this is sometimes the only option. I also use some sites with free download links. I have used these for at least 20+ years. In the past couple of years and especially during the lockdown periods, I have used them more to increase my e-book collection. There are times when links do trigger my antivirus software for a potentially malicious link. So, I am very careful when I try to find books this way."* - Male, 45-54

- *"I have used USBs and websites hosting free links to content. I use USBs because I have a good friend with whom I share what I read and vice-versa. Finding websites hosting free links is useful because it's easier than asking someone or using Torrents. I haven't changed the way I access content since lockdown. However, I do think they have been important while libraries have been closed for so long."* - Di Lopes

- *"I have received e-books directly from my friends shared via social media. The benefit is that I get it for free and it is usually a good way of getting good recommendations from friends. Also I access copies of e-books by simply searching for them on Google and it takes me to websites I can download them from. My spending has been high recently so it's really important for me to be able to access entertainment for free."* - Female, 16-24

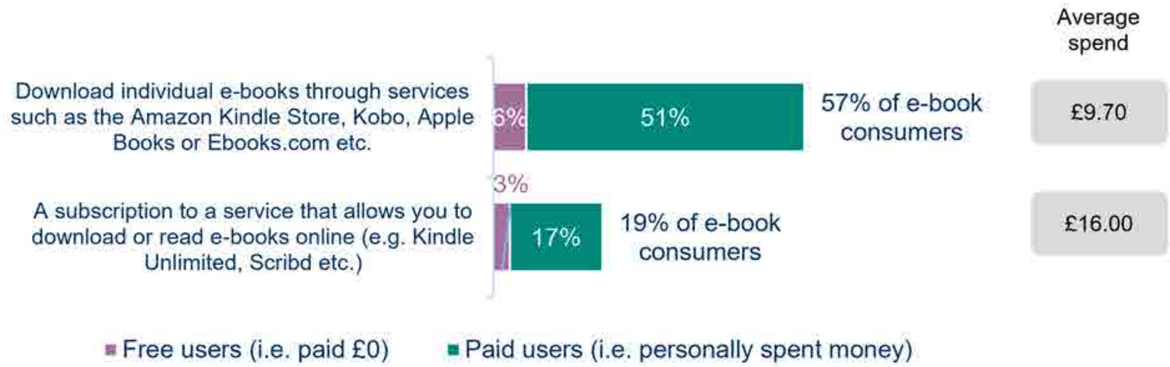
Paying for e-books

Those who had used a paid source to either download or access e-books were asked how much they had personally spent on each source.

- Six in ten (57%) e-book consumers said that they had downloaded individual e-books through services such as the Amazon kindle store during the previous three months, with most making a personal contribution towards a subscription (51% of total e-book consumers) each month. They spent, on average, £9.70 per month.

- Two in ten (19%) e-book consumers had a subscription to a service which allows them to download or read e-books. They spent, on average, more than that spent on downloading individual e-books (£16.00 each month).

G9. Approximately how much do you personally spend each month on the below sources of streaming or downloading/accessing e-books? (Proportion of e-book consumers over past three months using a paid source and average amount spent each month by users of that source)



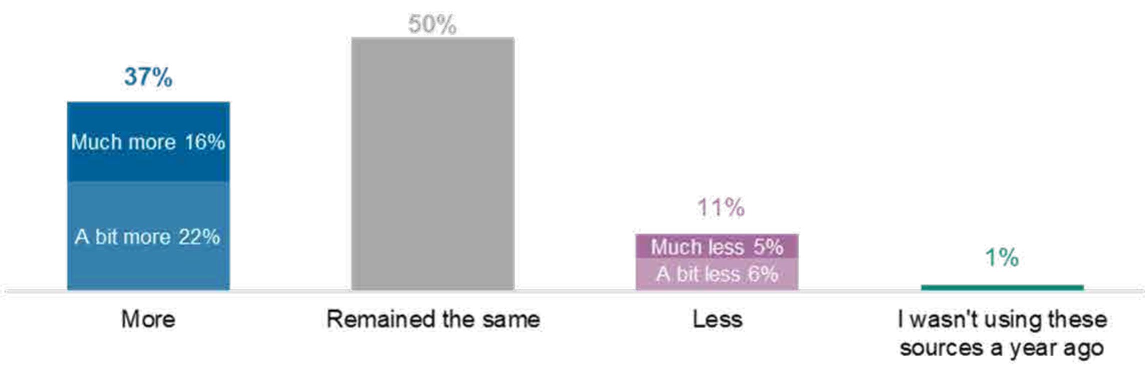
Base: n=1,097 (streamed and/or downloaded e-books), n=82-749 (those who used each source to download/access e-books)

Change in use of illegal sources

Those who had used an illegal source to download or access e-books were asked how the use of these sources compares to the same point a year ago.

- Respondents were most likely to say that their usage had remained the same (55%). This was followed by those who were using them more (37%), with relatively small proportions saying their usage was less (11%) or that they weren't using these sources a year ago (1%).

G10. You said you download/access e-books using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=140 (downloaded or accessed e-books illegally)

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

Those who had used **more** illegal sources in the past year frequently mentioned having more spare time to read and learn more about their interests as the reason for their increased usage. There were also some additional respondents who increased their use of illegal sources due to the loss of free resources such as libraries during COVID-19.

- *"With lockdown I have a lot more spare time. And since my way to occupy my time is reading, I have looked for more books on the internet."* - Female - 55+
- *"I have been looking for more books to help with my attempts to learn new things during lockdown."* - Male, 16-24
- *"Due to the pandemic, libraries are closed, so online is a good option for free books."* - Female, 16-24

Many of those who had used illegal sources **less** in the last year were able to access e-books in different, more preferable, legitimate ways. For some, this meant reading more physical books rather than e-books. Others stuck with e-books, but had been able to download/access their desired content through legal sources.

- *"During the pandemic my neighbours put a mini library near my house where we can swap books so I just go there now rather than looking online."* - Female, 55+
- *"I've had more access to free and legal content via sites such as Amazon in the last year."* - Male 55+
- *"In my case, as I constantly need new books for my university work, it's all about my demand for that particular month/period. It just so happens that I've been able to find more of what I need through my university this year."* - Female, 25-34

Very few respondents had **started** to use illegal sources to download/access e-books in the last year. Those who did mentioned a need to access free reading material in different ways due to lockdown restrictions, including the closure of libraries, as the reason for doing so.

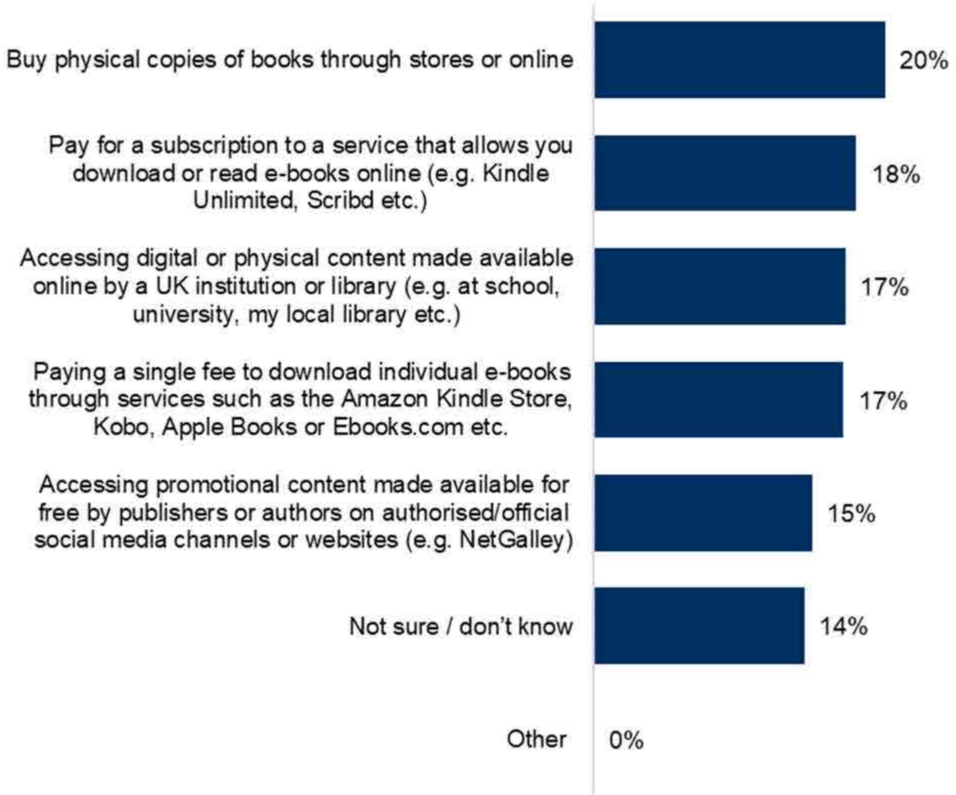
- *"The library was shut during the pandemic so I had to find other ways to access books."* - Female, 35-44

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.

- Encouragingly, the three paid sources accounted for over half (54%) of respondents. These included those who would "buy physical copies of books through stores" (20%), "pay for a subscription to a service or publisher that allows you to download or read e-books" (18%) or pay "a single fee to download individual e-books" (17%).
- The most popular free option was "Accessing digital or physical content made available online by a UK institution or library" (17%) and was closely followed by "accessing promotional content made available for free by publishers or authors" (15%).

G11. If e-books were no longer available to download/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 through services such as the Amazon Kindle Store, Kobo, Apple Books or Ebooks.com etc.	17%	17%	26%	7%	24%	6%	28%	19%
Pay for a subscription to a service that allows you download or read e-books online (e.g. Kindle Unlimited, Scribd etc.)	17%	18%	19%	41%	12%	21%	9%	12%
Buy physical copies of books through stores or online	19%	20%	27%	22%	23%	15%	28%	15%
Accessing promotional content made available for free by publishers or authors on authorised/official social media channels or websites (e.g. NetGalley)	13%	16%	0%	8%	25%	9%	18%	17%
Accessing digital or physical content made available online by a UK institution or library (e.g. at school, university, my local library etc.)	18%	17%	19%	15%	7%	31%	9%	16%
Not sure / don't know	16%	13%	9%	7%	9%	18%	9%	21%

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

Base: n=140 (downloaded or accessed e-books illegally)

Qualitative insights

If unofficial sources of e-books were to disappear, participants felt it would greatly impact their consumption and would make finding the e-books they wanted difficult. In addition to feeling reluctant to pay for individual copies of content or feeling that the prices of subscriptions weren't always worthwhile in relation to the amount they read, participants also noted that they would be restricted in the range of content available to them.

This meant that while some said they would explore taking up subscriptions to official e-book distributors, others felt that their consumption would likely decrease and they would end up not being able to read as much.

- *"If I could not get all the books I really wanted as I do now then I think my collection would be much smaller and I would probably have to wait longer to purchase individual books. Not being able to access in my 'normal' manner would be very difficult for me. I guess I might need to refer to the online library services to loan the books, but it would not be the same as having them permanently on my e-reader. On reflection, I think my consumption would probably drop and I would end up reaching back to some of my traditional paperbacks."* - Male, 45-54

- *"If I could no longer access free copies of e-books and magazines I would be unhappy and maybe a little stressed about it at first. It would lead to me reading even less books or reading books depending on what was available rather than what I really wanted to read. If I could no longer access books for free, I would have no choice but to consider renewing my subscription on Robo and Audible. However I would only do this when I am ready to start reading regularly. Overall I might consume less content."* - Female, 16-24

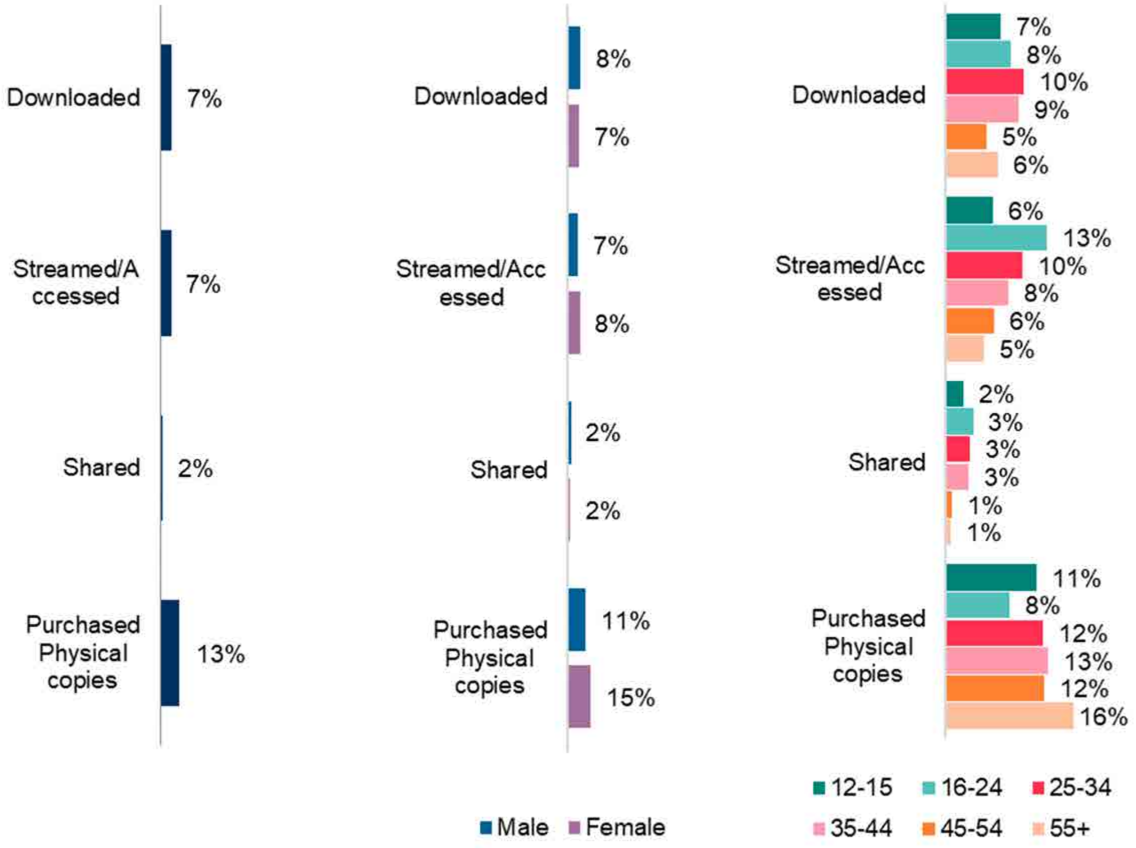
Digital Magazines

Engaging with digital magazines

21% had engaged with magazines in the previous 3 months (either by downloading, streaming or sharing digital magazines, or purchasing physical copies).

- The **most common method of access was purchasing physical copies** (13%).
- This was followed by downloading (7%) and streaming/accessing online (7%).
- The oldest age group (i.e. those aged 55+) was most likely to have purchased a physical copy (16%). In all other age groups this ranged between 8-13%.

H1. Have you downloaded/streamed/shared[1]/purchased physical copies of digital magazines in the past 3 months?



Base: n=5,000 (total sample)

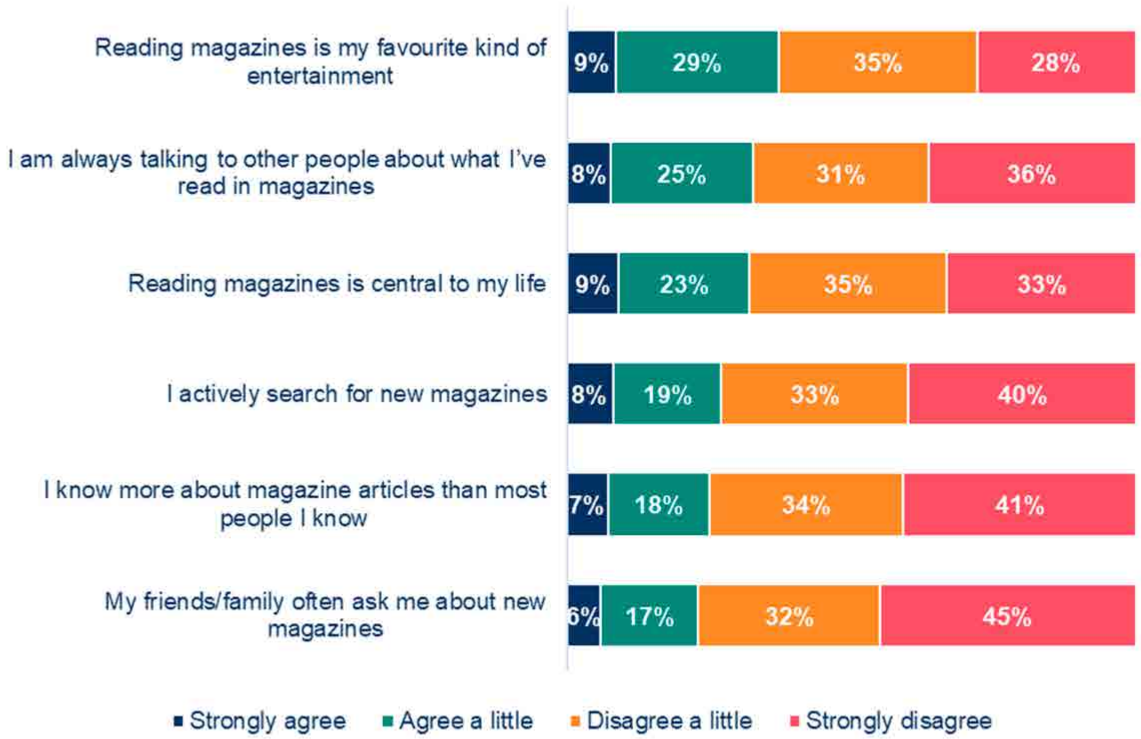
To get a broader sense of their passion for magazines/digital magazines respondents were asked to what extent

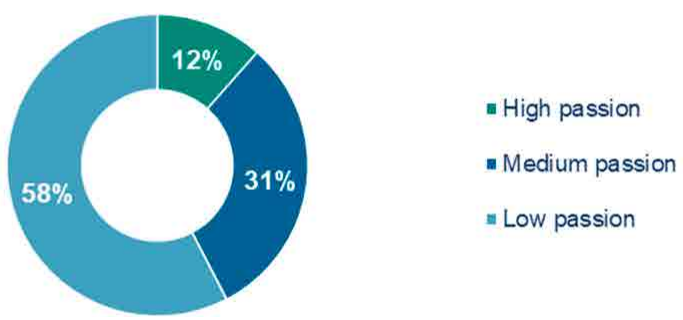
1 The definition of 'shared' was provided as: "By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated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

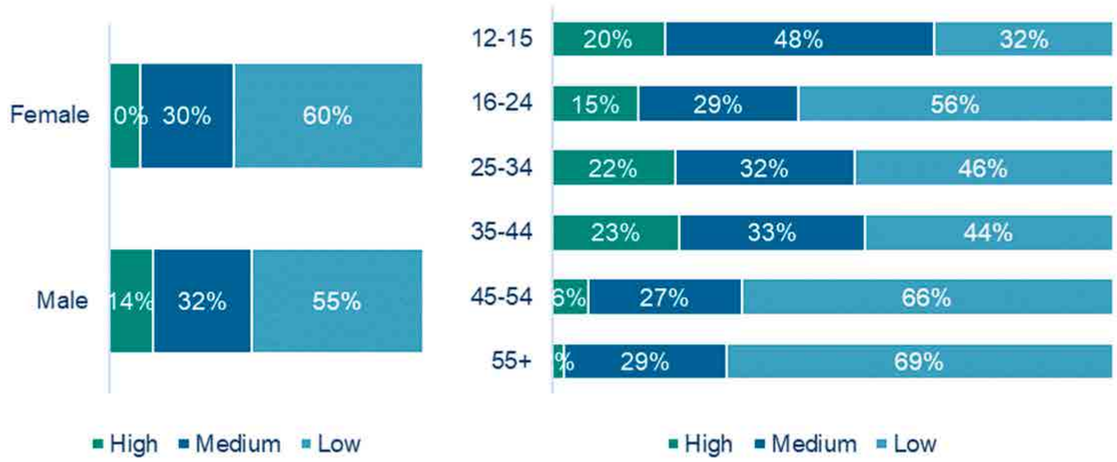
they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

- Around one in ten (12%) displayed a high level of passion for magazines/digital magazines.
- This was higher in those aged between 12-44 (15-23%) than it was in those aged 45+ (2-6%).
- Individual statements were agreed with by less than half of respondents indicating that, in comparison with other content categories, magazines/digital magazines didn't play such an important role in their lives. Out of all the statements provided, they were most likely to say that "Reading magazines in my favourite kind of entertainment" (37%).

H2. To what extent do you agree or disagree that each of the following statements describe you?







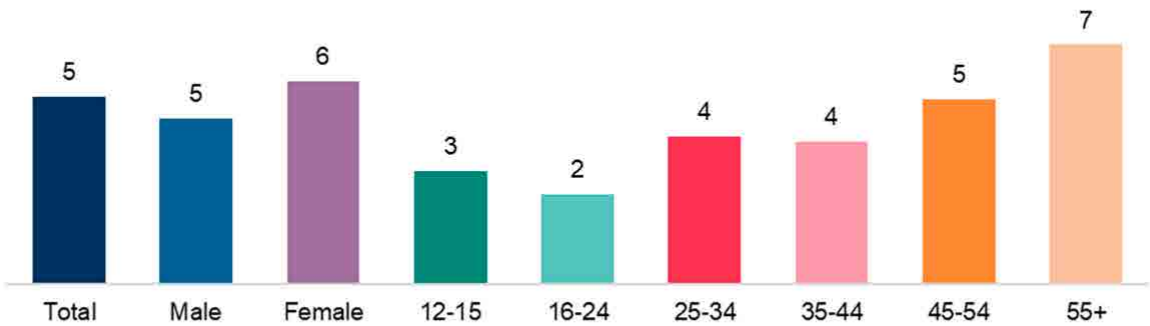
Base: n=1,032 (downloaded, streamed, shared and/or purchased physical copies of digital magazines in the past 3 months)

Physical purchasing of magazines

The 13% of respondents who had purchased physical copies of magazines during the previous 3 months were asked a question around the number of purchases made.

- Respondents had purchased an average of 5 magazines in the previous three months. Those aged 55+ had purchased 7 magazines in the previous three months while those in younger age groups had purchased between 2-5.

H3. In the past 3 months how many physical magazines did you purchase? (Average purchases)



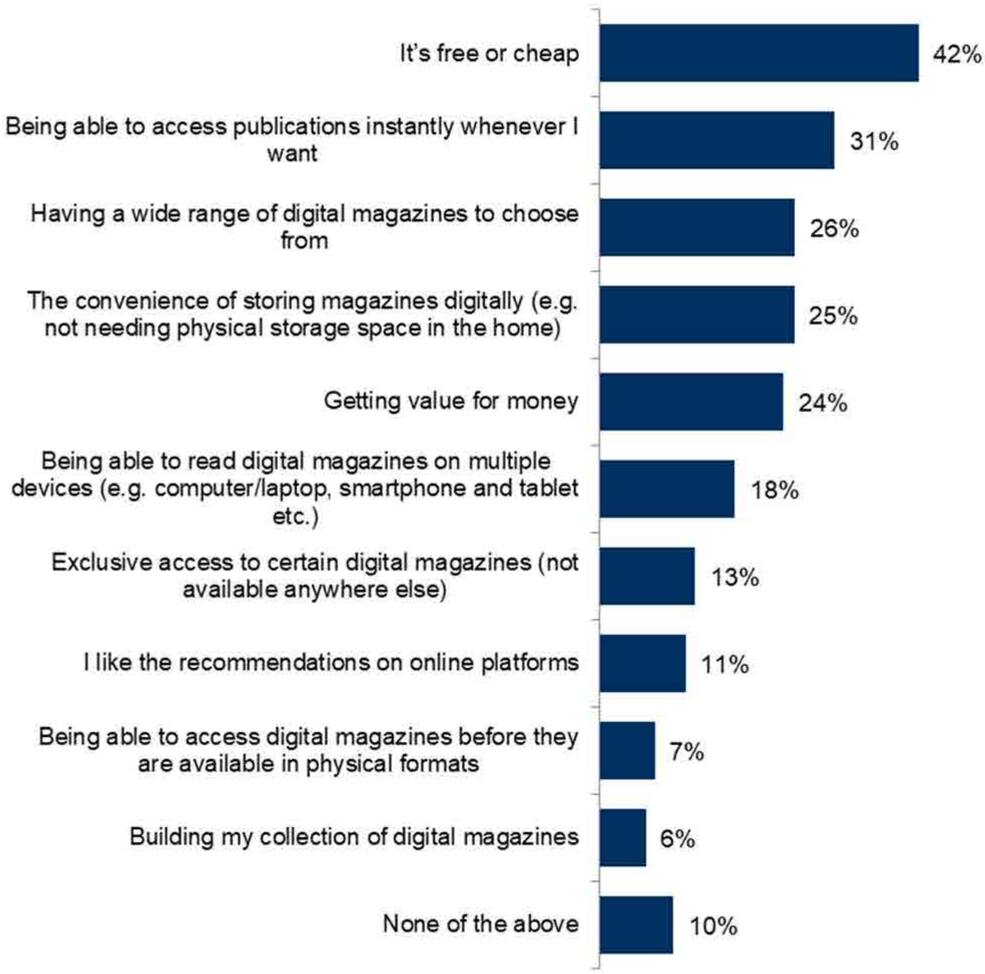
Base: n=652 (purchased physical copies of magazines in the past 3 months)

Understanding online consumption of digital magazines

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

- **Cost** was an important factor, with four in ten (42%) accessing digital magazines online because "It's free or cheap" and a further 24% because they wanted to get "value for money".
- Other prominent reasons related to being able to **access** anything "whenever" they wanted (31%), having a **wide range of content** to choose from (26%) and the convenience of digital storage (25%). No other reason was selected by more than 18% of respondents.

H4. What are the main reasons that you choose to access digital magazines online (i.e. downloading or streaming) Please select your top 3 (%)



Base: n=547 (downloaded or accessed digital magazines online in the past 3 months)

Male respondents	Female respondents
1. It's free or cheap (39%) 2. The convenience of storing magazines digitally (e.g. not needing physical storage space in the home) (29%) 3. Getting value for money (27%)	1. It's free or cheap (44%) 2. Being able to access publications instantly whenever I want (34%) 3. Having a wide range of digital magazines to choose from (27%)
Aged 12-15	**Aged 16-24**
1. Getting value for money (53%) 2. It's free or cheap (36%) 3. Having a wide range of digital magazines to choose from (31%)	1. It's free or cheap (36%) 2. Being able to access publications instantly whenever I want (34%) 3. The convenience of storing magazines digitally (e.g. not needing physical storage space in the home) (27%)
Aged 25-34	**Aged 35-44**
1. It's free or cheap (44%) 2. The convenience of storing magazines digitally (e.g. not needing physical storage space in the home) (32%) 3. Being able to access publications instantly whenever I want (27%)	1. It's free or cheap (35%) 2. Having a wide range of digital magazines to choose from (32%) 3. The convenience of storing magazines digitally (e.g. not needing physical storage space in the home) (32%)
Aged 45-54	**Aged 55+**
1. Having a wide range of digital magazines to choose from (39%) 2. It's free or cheap (39%) 3. Being able to access publications instantly whenever I want (36%)	1. It's free or cheap (49%) 2. Being able to access publications instantly whenever I want (30%) 3. Getting value for money (23%)

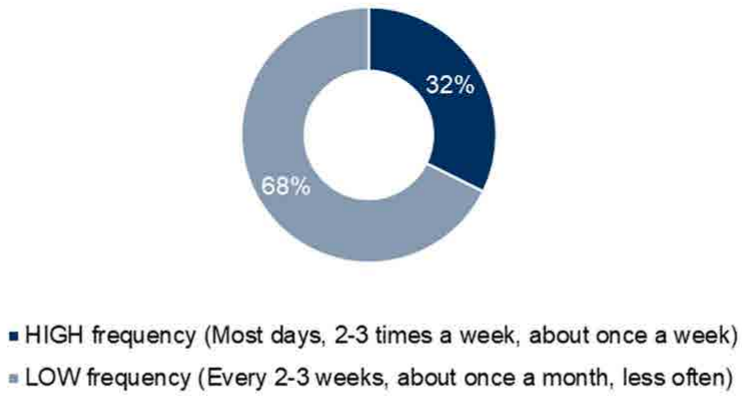
Downloading/accessing digital magazines

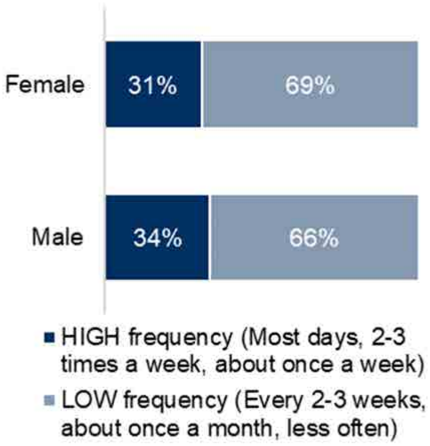
The 11% who had downloaded/accessed digital magazines during the previous 3 months were asked more questions around frequency, volume and sources used.

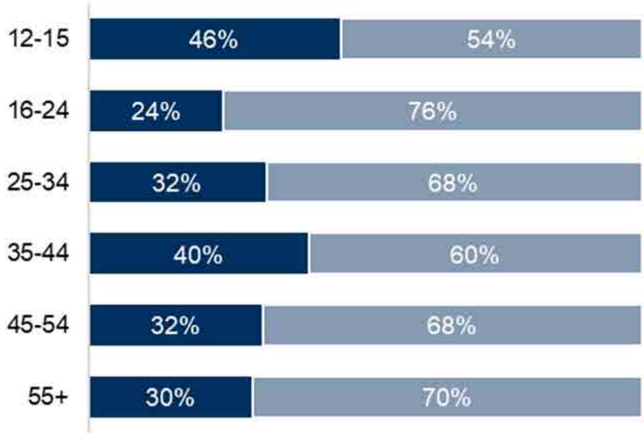
Frequency and volume of downloading digital magazines

- A third (33%) of those who downloaded/accessed digital magazines did so frequently (i.e. at least once a week).
- This was highest in those aged 12-15 (46%) and 35-44 (40%) and was between 24-32% in all other age groups.
- Consumers downloaded an average of 10 digital magazines over a three-month period. This rose to 15 for those aged 12-15 and 35-44 and was between 7-10 in all other age groups.

H5. Generally, how often do you download or access digital magazines through the internet? (%)

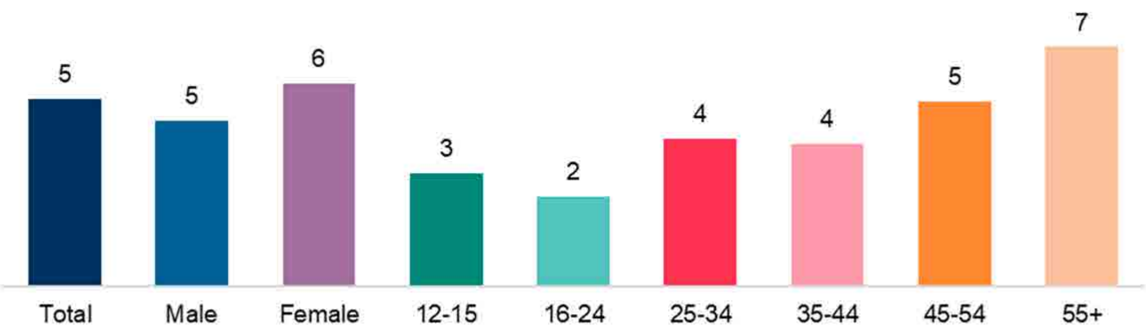






Base: n=547 (downloaded or accessed digital magazines in the past 3 months)

H6. In the past 3 months how many digital magazines did you download or access through the internet? (average number of downloads)



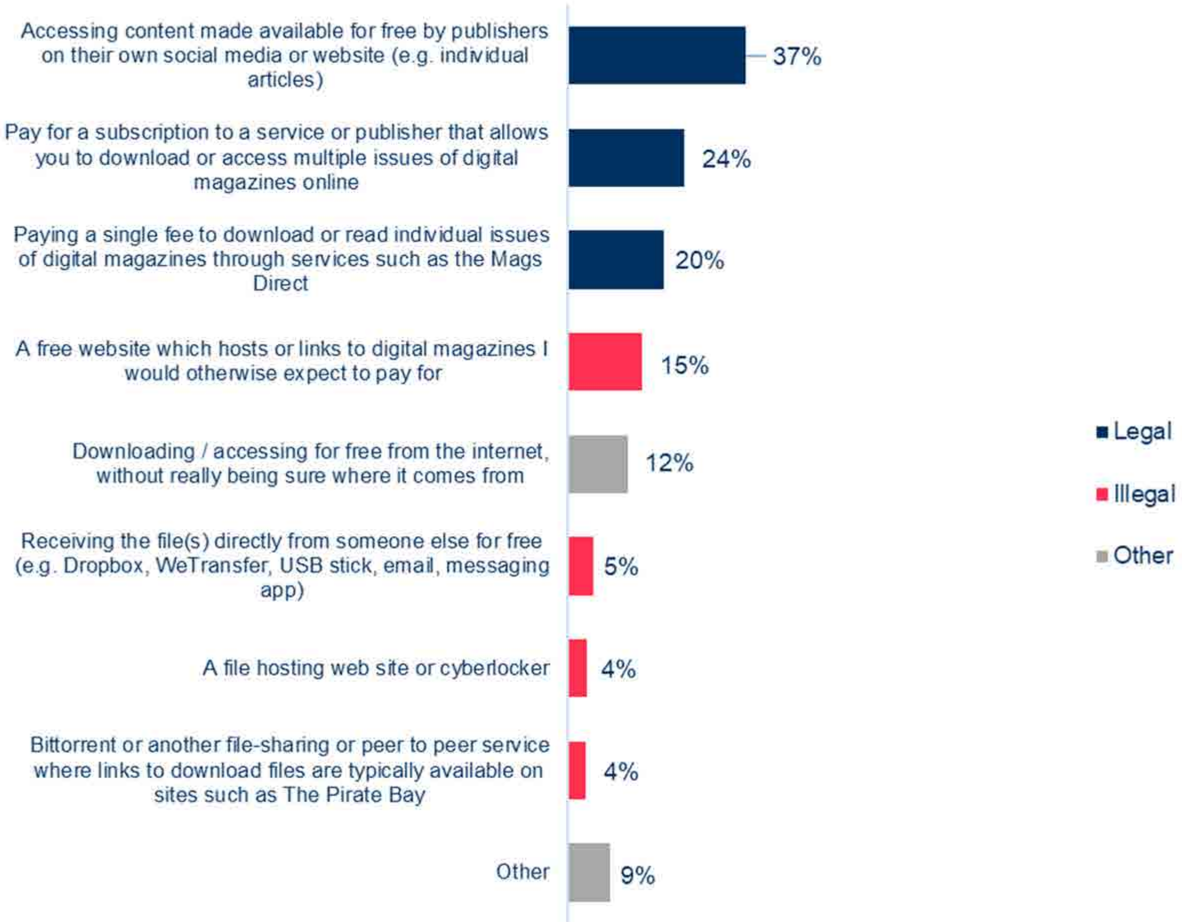
Base: n=537 (downloaded or accessed digital magazines in the past 3 months)

Sources of downloading or accessing digital magazines

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

- The most commonly used sources were **legal** ones. The most popular was "Accessing content made available for free by publishers on their own social media or website" (37%).
- This was followed by two paid options: "Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online" (24%) and "Paying a single fee to download or read individual issues of digital magazines" (20%).
- The most used illegal source was "a free website which hosts or links to digital magazines I would otherwise expect to pay for" which, at 15%, was almost on a par with the above legal options. Other than that, no illegal source was selected by more than 5%.

H7. Which of the following have you used to download or access digital magazines in the past 3 months? Please select all that apply. (%)



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
Paying a single fee to download or read individual issues of digital magazines through services such as the Mags Direct, Newsstand.co.uk or Zinio	24%	16%	37%	22%	29%	27%	16%	7%
Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online (e.g. a subscription to the digital edition of Vogue or Empire either directly or through services such as Mags Direct, Newsstand.co.uk or Zinio)	31%	17%	34%	22%	26%	24%	20%	24%
Accessing content made available for free by publishers on their own social media or website (e.g. individual articles)	31%	43%	39%	42%	34%	34%	36%	37%
A file hosting web site or cyberlocker	5%	3%	9%	5%	9%	4%	0%	1%
Bittorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay	4%	3%	12%	4%	4%	9%	1%	0%
Receiving the file(s) directly from someone else for free (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	7%	4%	6%	9%	5%	7%	7%	3%
A free website which hosts or links to digital magazines I would otherwise expect to pay for	14%	17%	14%	15%	17%	17%	14%	15%
Downloading / accessing for free from the internet, without really being sure where it comes from	13%	12%	11%	15%	10%	14%	12%	13%

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

Base: n=547 (downloaded or accessed digital magazines during the past 3 months)

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

Those unsure of the source of the digital magazines they had downloaded/accessed were asked to explain more in their own words about how they obtained them.

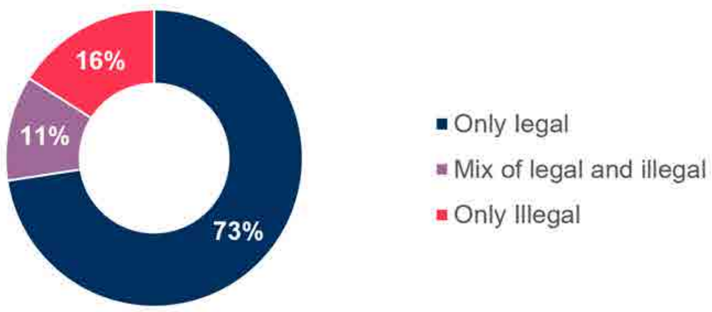
Respondents who were unsure of their source for digital magazines frequently used a search engine to find links to free magazines about subjects they were interested in. Many also encountered and followed links to digital magazines of interest unexpectedly while browsing the internet for other reasons. For example, multiple respondents mentioned happening upon links to digital magazines while scrolling through social media, and, if it piqued their curiosity, following that link.

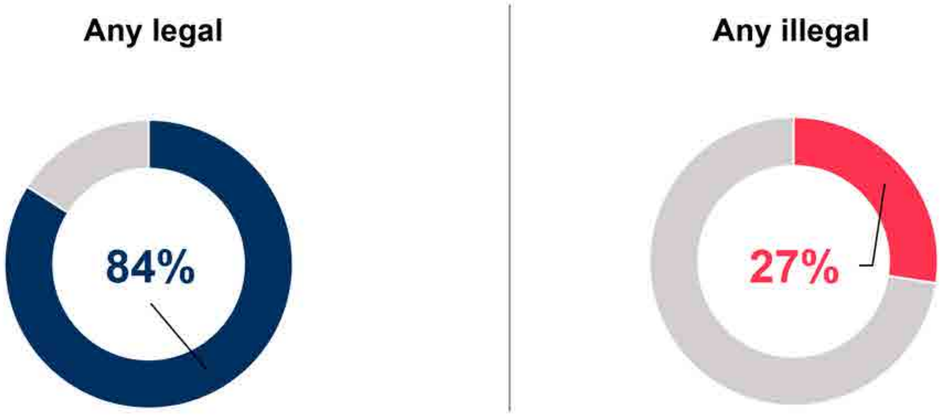
Legality of downloading or accessing digital magazines

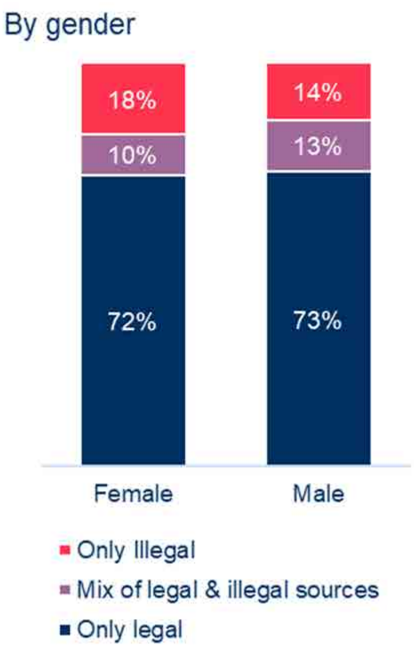
To better understand the distribution of sources across legal and illegal categories, those who had accessed digital magazines in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only; illegal sources only; or a mix of the two.

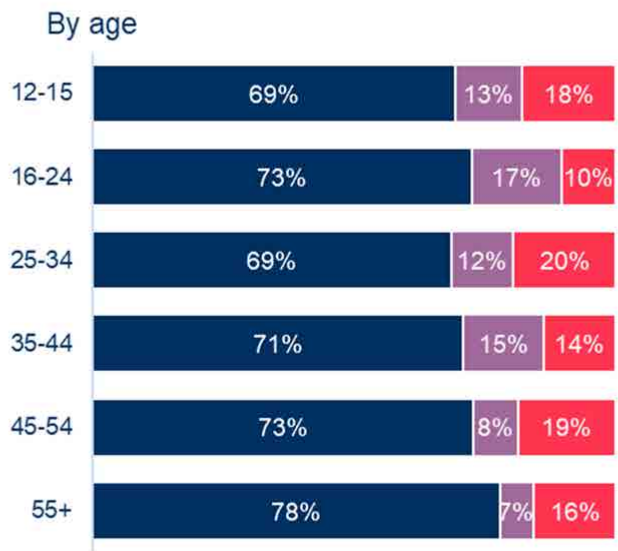
The answer option "downloading/accessing for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they only consumed content this way was not included in the base.

- Legal:
  - Overall 84% had used at least one legal source to access digital magazines.
  - **73%** had used legal sources only.
- Illegal:
  - **27%** had used at least one illegal source to access digital magazines.
  - **16%** had used illegal sources only to access digital magazines.
- Mixed:
  - **11%** had used a mix of legal and illegal sources.


16%
11%
73%
Only legal
Mix of legal and illegal
Only Illegal


Any legal
84%
Any illegal
27%


By gender
18%
10%
72%
14%
13%
73%
Female
Male
Only Illegal
Mix of legal & illegal sources
Only legal


By age
12-15
69%
13%
18%
16-24
73%
17%
10%
25-34
69%
12%
20%
35-44
71%
15%
14%
45-54
73%
8%
19%
55+
78%
7%
16%

Base: n=457 (downloaded or accessed digital magazines in the past 3 months, with those who selected 'other' or 'not sure of source' removed).

H8. And how is the way you download/access digital magazines typically split across the following sources? (average % of their time and average number of downloads)

Legality	Source	Average % of usage split
Legal	Paying a single fee to download or read individual issues of digital magazines through services such as the Mags Direct, Newsstand.co.uk or Zinio	16%
	Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online (e.g. a subscription to the digital edition of Vogue or Empire either directly or through services such as Mags Direct, Newsstand.co.uk or Zinio)	19%
	Accessing content made available for free by publishers on their own social media or website (e.g. individual articles)	31%
Illegal	A file hosting web site or cyberlocker (Openload, Zippyshare, Rapidgator etc.)	2%
	Bittorrent or another file-sharing or peer to peer service (e.g. uTorrent, eMule) where links to download files are typically available on sites such as The Pirate Bay, Torrentz, or Rarbg	1%
	Receiving the file(s) directly from someone else for free (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	3%
	A free website which hosts or links to digital magazines I would otherwise expect to pay for	12%
Other	Downloading/accessing for free from the internet, without really being sure where it comes from	9%
	Other	8%

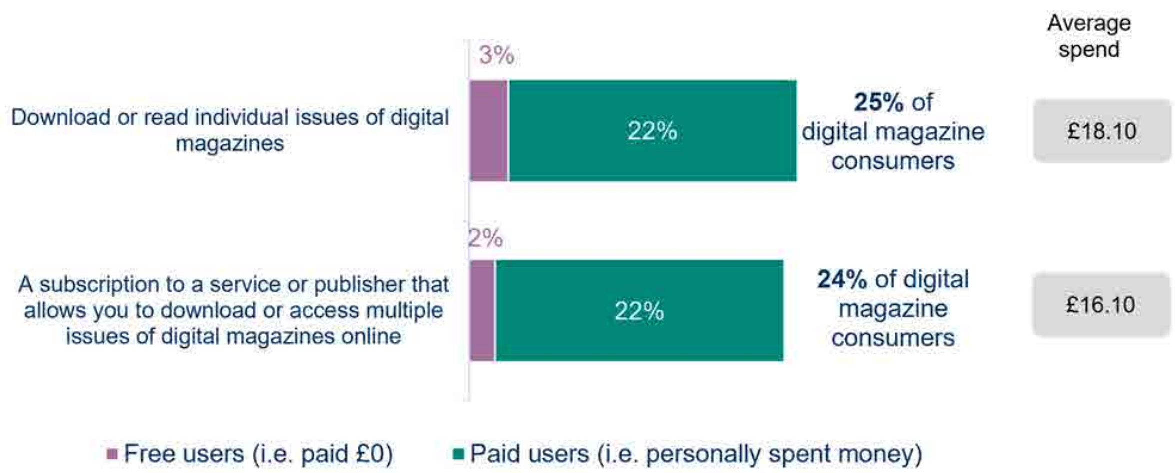
Base: n=547 (downloaded or accessed digital magazines in the past 3 months)

Paying for digital magazines

Those who had used a paid source to either download or access digital magazines were asked how much they had personally spent on each source.

- Approximately a quarter (25%) of digital magazine consumers said they tended to download or read individual issues of digital magazines. They spent, on average, £18.10 each month.
- A similar proportion (24%) had a subscription to access multiple issues of digital magazines online during the previous three months. They spent, on average, marginally less than was spent on reading individual issues (£16.10 each month).

H9. Approximately how much do you personally spend each month on the below sources of streaming or downloading digital magazines? (Proportion of digital magazines consumers over past three months using a paid source and average amount spent each month by users of that source)



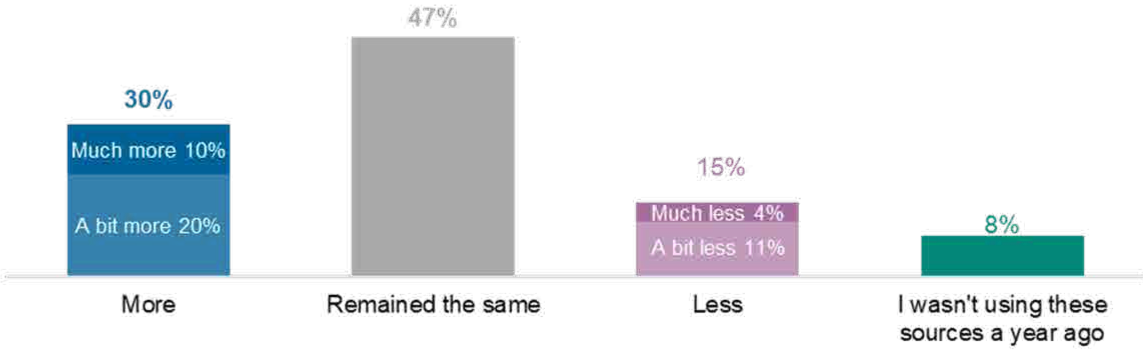
Base: n=414 (downloaded/accessed digital magazines), n=14-163 (those who use each source to download/access digital magazines)

Change in use of illegal sources

Those who had used an illegal source to download or access digital magazines were asked how the use of these sources compares to the same point a year ago.

- Respondents were most likely to say their usage had remained the same (47%). This was followed by those who were using these sources more (30%) with smaller numbers saying that they were using them less (15%) or they weren't using them at all a year ago (8%).

H10. You said you download or access digital magazines using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=125 (downloaded or accessed digital magazines illegally)

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

Respondents who had used illegal sources **more** in the last year cited a variety of reasons for their increased usage, with many of those reasons relating to COVID-19. Some respondents, for example, decreased their trips to the shop where they had previously purchased their favourite magazines, and replaced that with digital magazines from illegal sources. Others took up new hobbies to fill up increased time spent at home and looked for relevant information about those hobbies in digital magazines from illegal sources.

- *"Lockdown has meant fewer physical shopping trips to buy the magazines I like, so I have gotten more from the internet."* - Female, 55+
- *"I've taken up baking more during the lockdowns and found recipes online in digital magazines."* - Female, 25-34
- *"Because I have more time in lockdown and have developed more interest in reading health and wellness articles in online magazines."* - Female, 16-24

Most of those who had used illegal sources **less** in the last year attributed this decrease to a lack of interest in reading digital magazines. Most of these respondents did not replace their consumption of digital magazines with another type of media, though a few mentioned that, in the last year, they started to prefer other types of reading such as books to magazines.

- *"Because I became fed up of reading them."* - Female, 55+
- *"Most of the magazines have very little interest to me."* - Male, 16-24
- *"Because I've been reading e-books and paperback books much more than magazines in the last year."* - Male, 25-34

Only a few respondents had **started** to use illegal sources to download/access digital magazines in the year. Those who did cited only having become aware of these sources in the last year and using them to fill time during lockdown as the reasons for doing so.

- *“Due to lockdown restrictions and having more time.”* - Female, 55+
- *“Word of mouth - I heard about the sources this year and thought I’d give them a try.”* - Female, 45-54

Alternatives to infringement

Those who had used illegal sources to download/access digital magazines were asked which **single** legal source they would use if they could no longer access digital magazines illegally.

- Respondents were most likely to indicate that they would “access content made available for free by publishers on their own social media or website” (36%).
- Paid options accounted for around half (46%) of responses. They were split between buying “physical copies of magazines through stores” (19%), paying “for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online” (18%) and “paying a single fee to download or read individual issues of digital magazines” (9%).
- A high number of infringers (17%) were not sure what they would do.

H11. If digital magazines were no longer available to download or access via these sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)

	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
Paying a single fee to download or read individual issues of digital magazines through services such as the Mags Direct, Newsstand.co.uk or Zinio	13%	6%	0%	26%	9%	4%	6%	6%
Pay for a subscription to a service or publisher that allows you to download or access multiple issues of digital magazines online (e.g. a subscription to the digital edition of Vogue or Empire either directly or through services such as Mags Direct, News	20%	16%	32%	26%	15%	22%	6%	14%
Buy physical copies of magazines through stores	12%	26%	10%	16%	14%	13%	31%	28%
Accessing content made available for free by publishers on their own social media or website (e.g. individual articles)	38%	34%	31%	27%	54%	34%	44%	19%
Paying a single fee to download or read individual issues of digital magazines through services such as the Mags Direct, Newsstand.co.uk or Zinio	13%	6%	0%	26%	9%	4%	6%	6%
Not sure / don't know	18%	16%	28%	6%	8%	27%	13%	26%

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

Base: n=125 (downloaded or accessed digital magazines illegally)

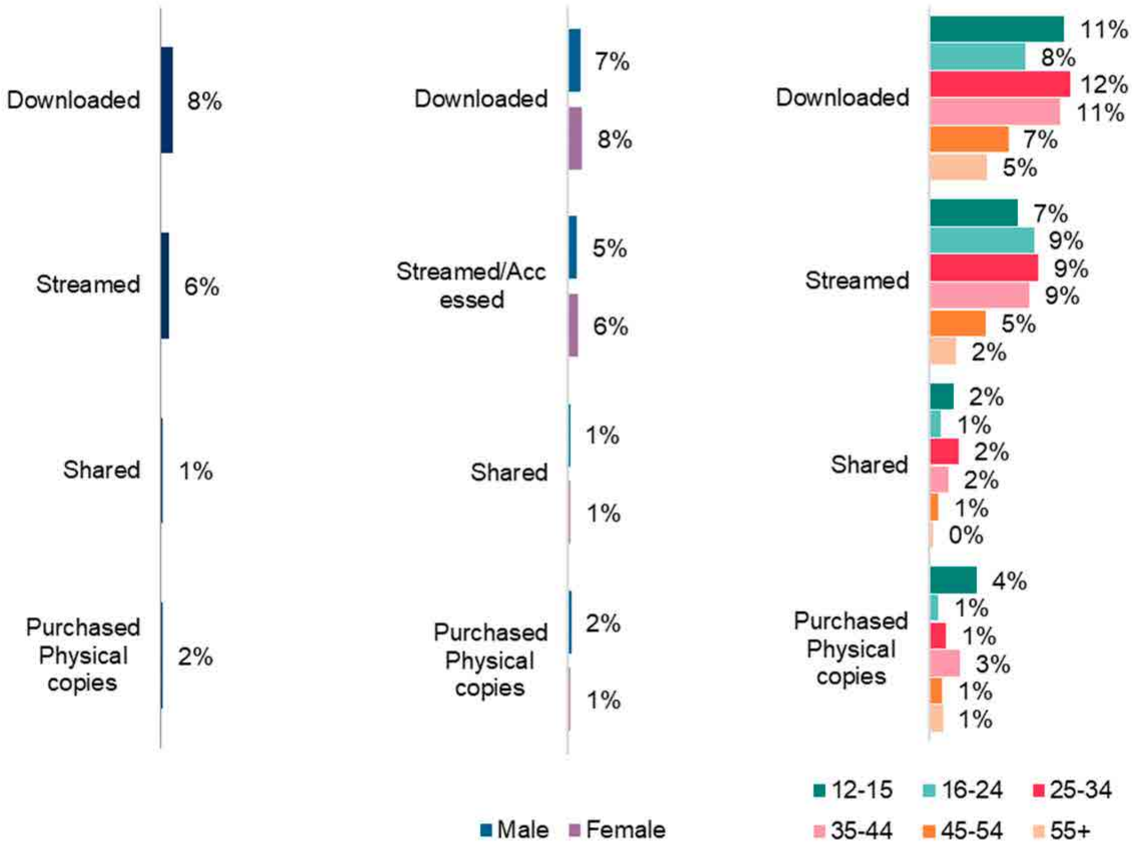
Audiobooks

Engaging with audiobooks

11% had engaged with audiobooks in the previous 3 months (either by downloading, streaming or sharing audiobooks, or purchasing physical copies).

- The **most common method of access was downloading** (8%).
- This was followed by streaming/accessing online (6%) and then purchasing physical copies (2%).

I1. Have you downloaded/streamed/shared[1]/purchased physical copies of audiobooks in the past 3 months?



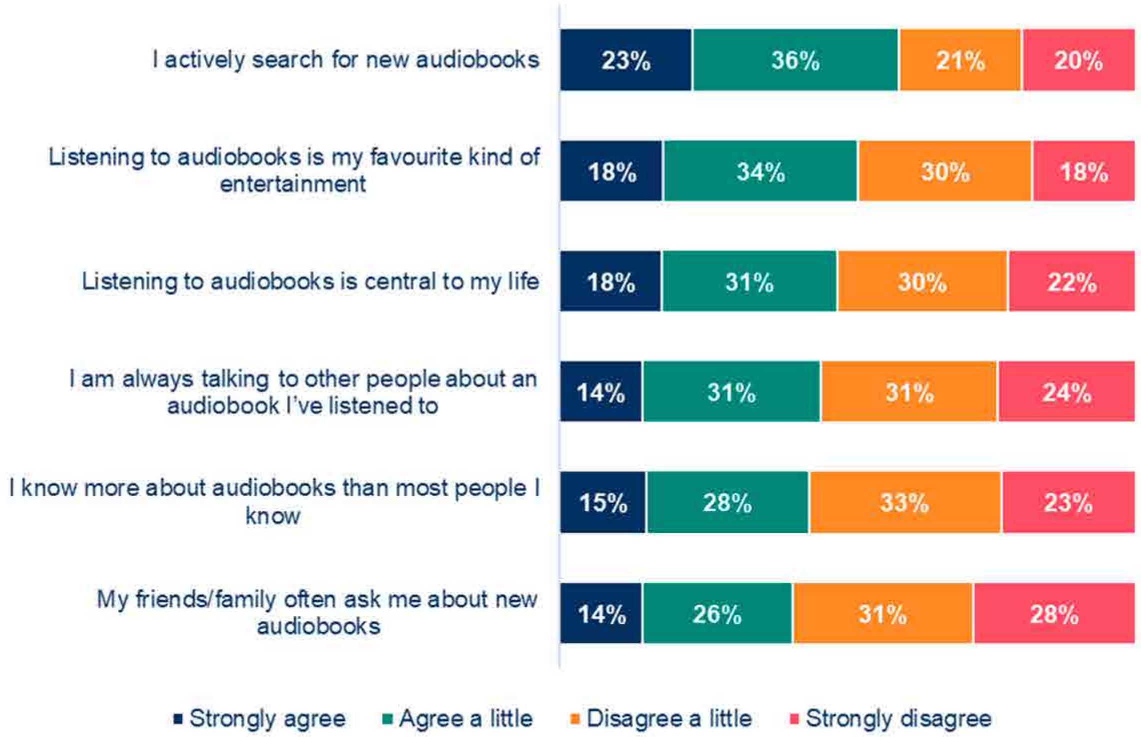
Base: n=5,000 (total sample)

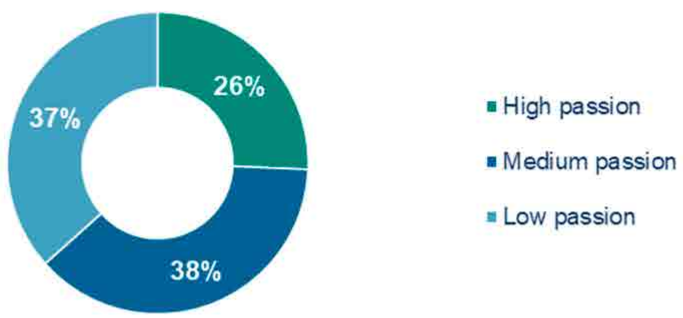
1 The definition of ‘shared’ was provided as: “By shared we mean that you personally made the file publicly available or sent or uploaded it online for someone else to download or stream/access. This does not include sending links to content that has already been shared by someone else, unless stated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

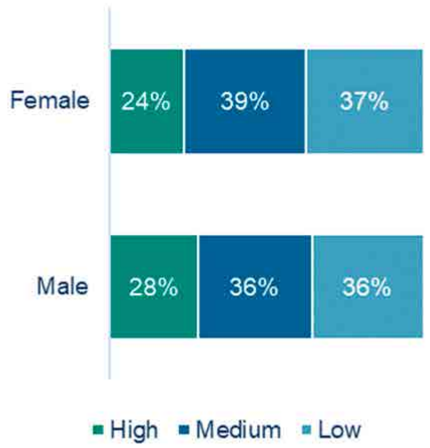
To get a broader sense of **their passion for audiobooks**, respondents were asked to what extent they agreed with a range of statements and then grouped as High, Medium or Low, based on their responses.

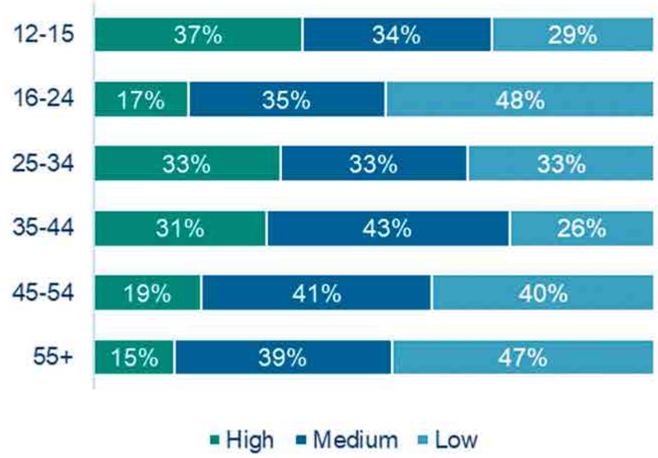
- Around a quarter (26%) had a high level of passion for audiobooks.
- Looking at the individual statements, over half of respondents (56%) agreed that they actively search for new audiobooks. This was followed by those who said that listening to books is their favourite form of entertainment (52%) or that listening is central to their lives (48%).

I2. To what extent do you agree or disagree that each of the following statements describe you?









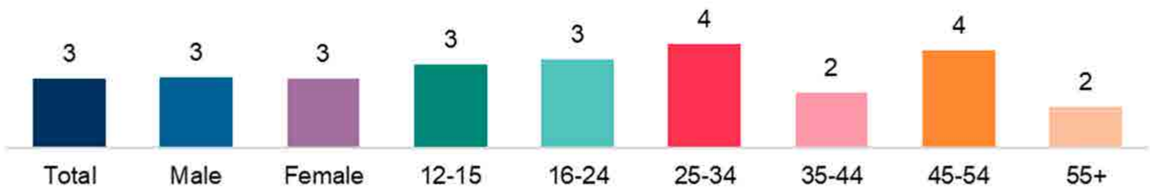
Base: n=529 (downloaded, streamed, shared and/or purchased physical copies of audiobooks in the past 3 months)

Physical purchasing of audiobooks

The 2% of respondents who had purchased physical copies of audiobooks during the previous 3 months were asked a question around the number of purchases made.

- Respondents had purchased, on average, 3 audiobooks during the previous three months. This was the case for both male and female respondents, but varied between 2-4 audiobooks for different age groups.

I3. In the past 3 months how many physical audiobooks did you purchase? (Average purchases)



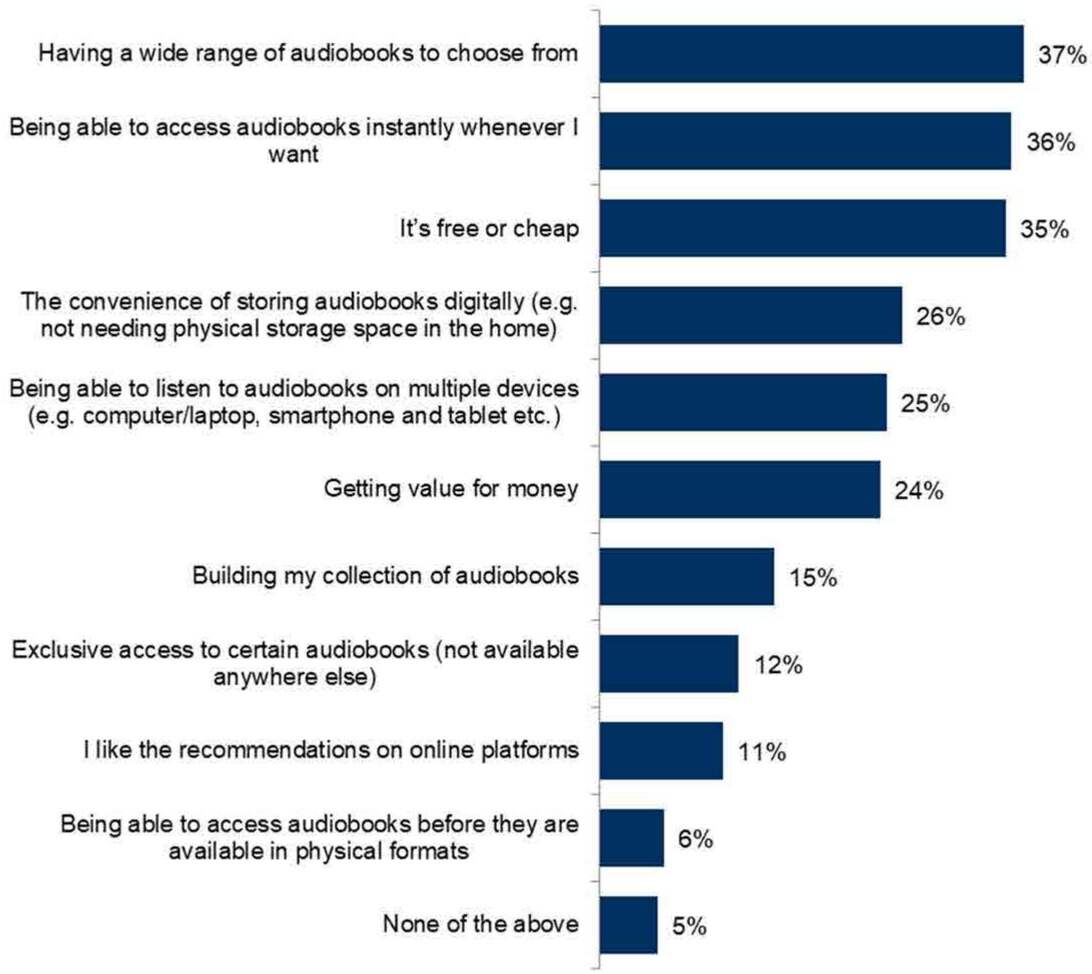
Base: n=78 (purchased physical copies of audiobooks in the past 3 months)

Understanding online consumption of audiobooks

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

- No single factor was selected by more than half of respondents. Three options were selected by approximately a third or more, which included **choice** ("having a wide range of audiobooks to choose from" 37%), **cost** ("it's free or cheap" 35%) and **access** ("being able to access publications instantly whenever I want" 32%).
- These were followed by the **convenience** of storing content digitally (26%), being able to listen on multiple devices (25%) and getting value for money (24%).
- No other factor was selected by more than 15%.

I4. What are the main reasons that you choose to access audiobooks online (i.e. downloading or streaming) Please select your top 3 (%)



Base: n=496 (downloaded or streamed audiobooks online in the past 3 months)

Male respondents	Female respondents
1. Having a wide range of audiobooks to choose from (34%) 2. It's free or cheap (33%) 3. Being able to access audiobooks instantly whenever I want (32%)	1. Having a wide range of audiobooks to choose from (40%) 2. Being able to access audiobooks instantly whenever I want (39%) 3. It's free or cheap (37%)
Aged 12-15	**Aged 16-24**
1. Having a wide range of audiobooks to choose from (39%) 2. Being able to access audiobooks instantly whenever I want (36%) 3. It's free or cheap (33%)	1. It's free or cheap (47%) 2. Exclusive access to certain audiobooks (not available anywhere else) (28%) 3. The convenience of storing audiobooks digitally (e.g. not needing physical storage space in the home) (22%)
Aged 25-34	**Aged 35-44**
1. It's free or cheap (35%) 2. Having a wide range of audiobooks to choose from (33%) 3. Being able to access audiobooks instantly whenever I want (30%)	1. Having a wide range of audiobooks to choose from (47%) 2. Being able to access audiobooks instantly whenever I want (45%) 3. It's free or cheap (38%)
Aged 45-54	**Aged 55+**
1. Being able to access audiobooks instantly whenever I want (37%) 2. It's free or cheap (34%) 3. Having a wide range of audiobooks to choose from (33%)	1. Having a wide range of audiobooks to choose from (44%) 2. Being able to access audiobooks instantly whenever I want (42%) 3. The convenience of storing audiobooks digitally (e.g. not needing physical storage space in the home) (29%)

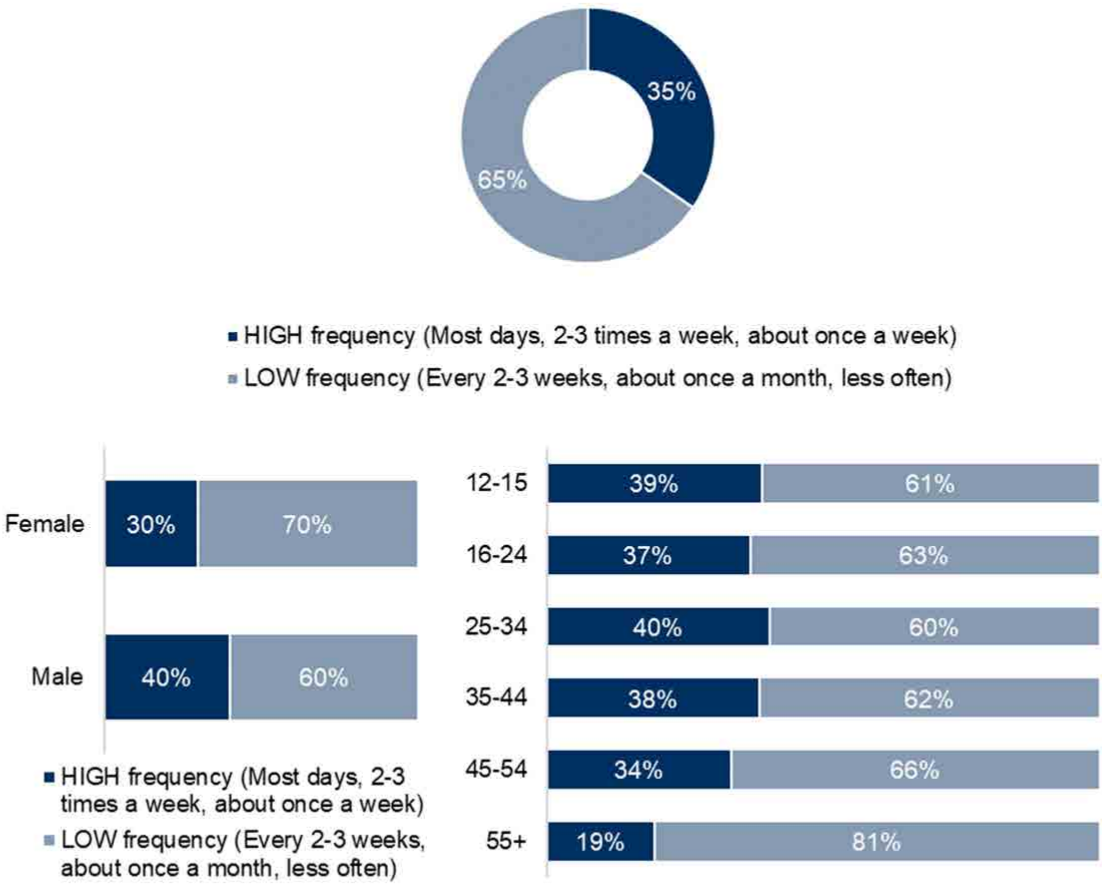
Downloading/accessing audiobooks

The 10% who had downloaded/accessed audiobooks during the previous 3 months were asked more questions around frequency, volume and sources used.

Frequency and volume of downloading/accessing audiobooks

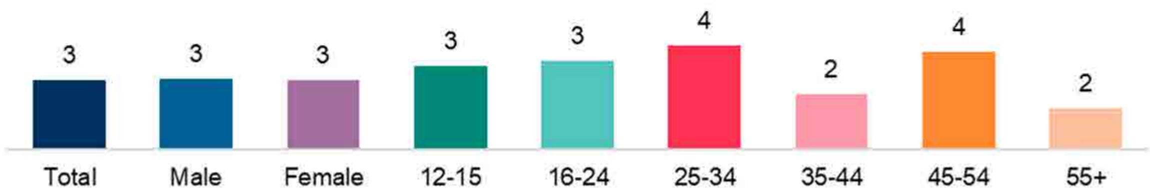
- A third (35%) of those who downloaded/accessed audiobooks did so frequently (i.e. at least once a week).
- Male audiobooks consumers were more likely to access them frequently (i.e. at least once a week) which, at 40%, was 10% higher than female respondents.
- An average of 10 audiobooks were downloaded or accessed during the previous three months.

I5. Generally, how often do you download or access audiobooks through the internet? (%)



Base: n=496 (downloaded or accessed audiobooks in the past 3 months)

I6. In the past 3 months how many audiobooks did you download or access through the internet? (average number of downloads)



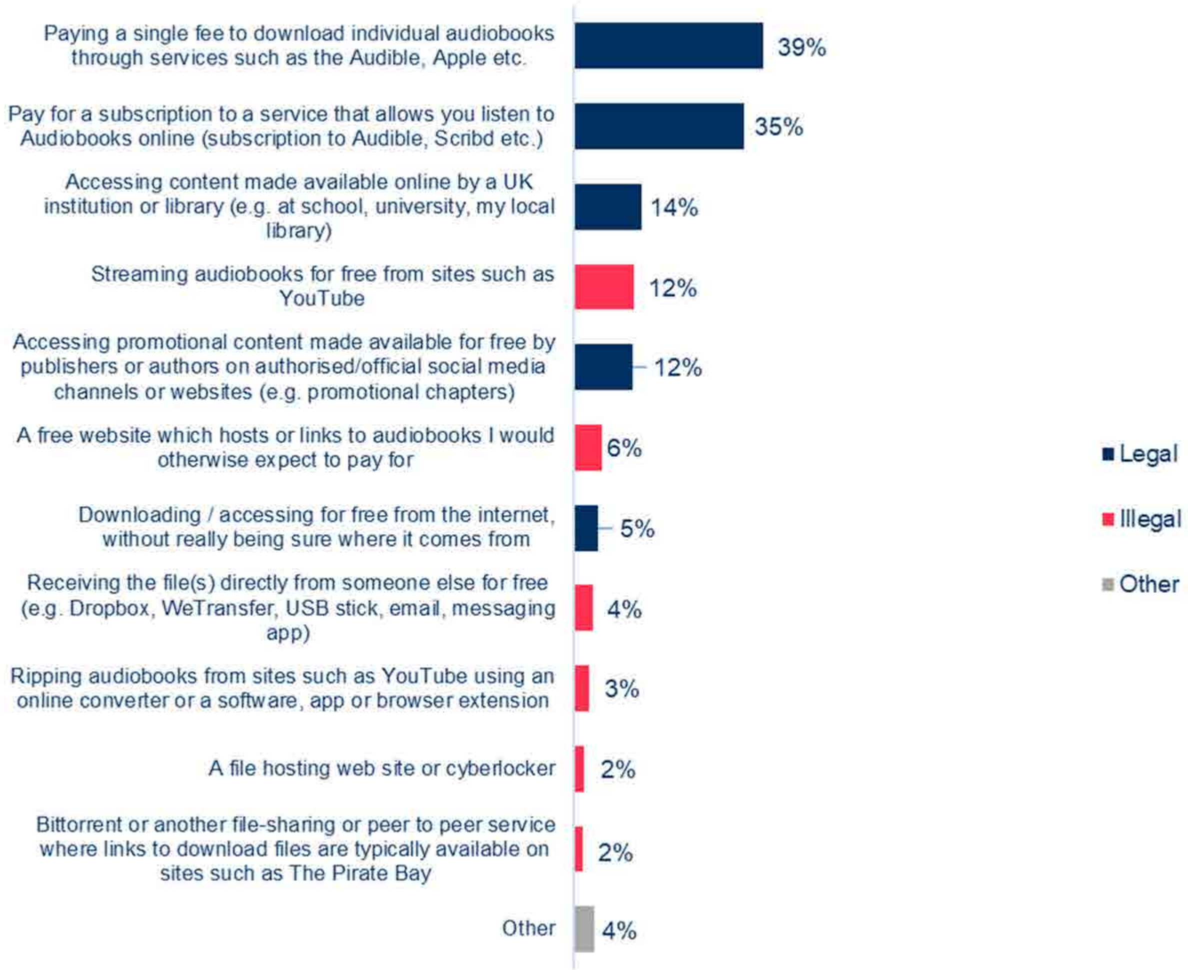
Base: n=488 (downloaded or accessed audiobooks in the past 3 months)

Sources of downloading/accessing audiobooks

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

- The most commonly used sources were legal ones. The top two sources, by a large margin, were “Paying a single fee to download individual audiobooks through services such as the Audible, Apple etc.” (39%) and “‘Pay for a subscription to a service that allows you listen to Audiobooks online” (35%).
- This was followed some way behind by “Accessing content made available online by a UK institution or library” (14%) and “Accessing promotional content made available for free by publishers on their own social media or website” (12%).
- The most selected illegal source, a new one added in in this wave, was “Streaming audiobooks for free from sites such as YouTube” (12%). No other source was selected by more than 6% of respondents.

I7. Which of the following have you used to download/access audiobooks in the past 3 months? Please select all that apply. (%)



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
Paying a single fee to download individual audiobooks through services such as the Audible, Apple etc.	44%	35%	43%	35%	41%	43%	42%	31%
Pay for a subscription to a service that allows you listen to Audiobooks online (subscription to Audible, Scribd etc.)	35%	35%	44%	32%	38%	30%	29%	38%
Accessing promotional content made available for free by publishers or authors on authorised/official social media channels or websites (e.g. promotional chapters)	12%	13%	16%	24%	11%	11%	12%	5%
Ripping audiobooks from sites such as YouTube using an online converter (e.g. Y2mate, Flvto.biz) or a software, app or browser extension	4%	3%	7%	3%	3%	6%	2%	0%
A file hosting web site or cyberlocker (Zippyshare, Rapidgator etc.)	3%	2%	7%	3%	3%	2%	0%	0%
Bittorrent or another file-sharing or peer to peer service (e.g. uTorrent, eMule) where links to download files are typically available on sites such as The Pirate Bay, Torrentz, or Rarbg	3%	1%	2%	3%	3%	2%	0%	1%
Receiving the file(s) directly from someone else for free (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	4%	4%	11%	3%	2%	3%	6%	3%
A free website which hosts or links to audiobooks I would otherwise expect to pay for (e.g. sites such as audiobookbay.net)	7%	5%	6%	9%	4%	6%	6%	7%
Accessing content made available online by a UK institution or library (e.g. at school, university, my local library)	10%	17%	7%	26%	3%	18%	7%	23%
Streaming audiobooks for free from sites such as YouTube	16%	10%	11%	25%	12%	13%	10%	6%
Downloading / accessing for free from the internet, without really being sure where it comes from	4%	6%	9%	7%	5%	4%	5%	4%

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

Base: n=496 (downloaded or accessed audiobooks during the past 3 months)

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

Those unsure of the source of the audiobooks they had downloaded/accessed were asked to explain more in their own words about how they obtained them.

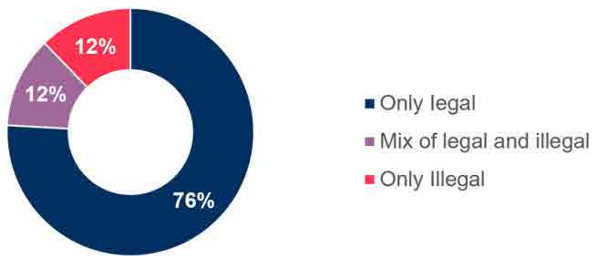
Of those who were unsure of their source, nearly all used a search engine to find free audiobooks that they could download/access through the internet. A few others received forwarded links from friends on email and other messaging services.

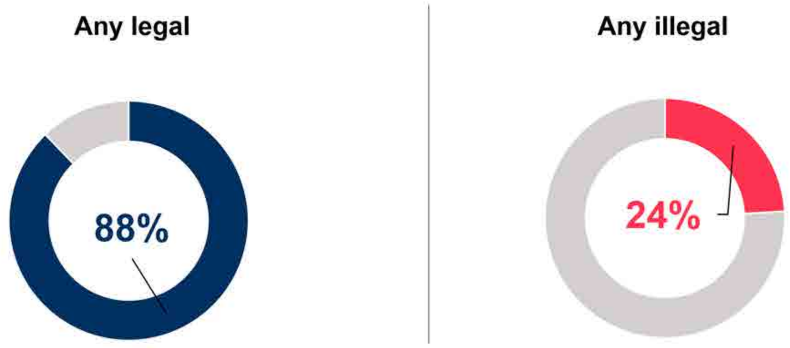
Legality of downloading/accessing audiobooks

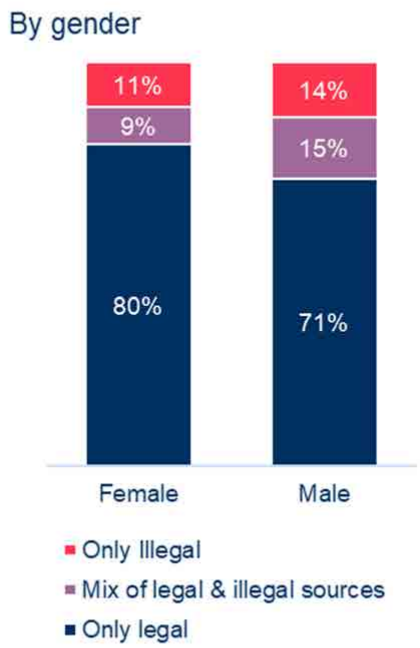
To better understand the distribution of sources across legal and illegal categories, those who had downloaded/accessed audiobooks in the previous 3 months were grouped into the following (mutually exclusive) categories: using legal sources only; illegal sources only; or a mix of the two.

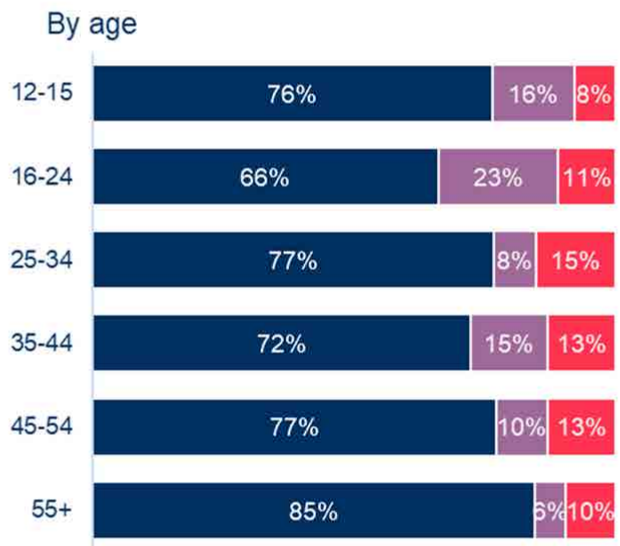
The answer option "downloading/accessing for free from the internet, without really being sure where it comes from" was not included in the definition of either legal or illegal. Anyone who said they only consumed content this way was not included in the base.

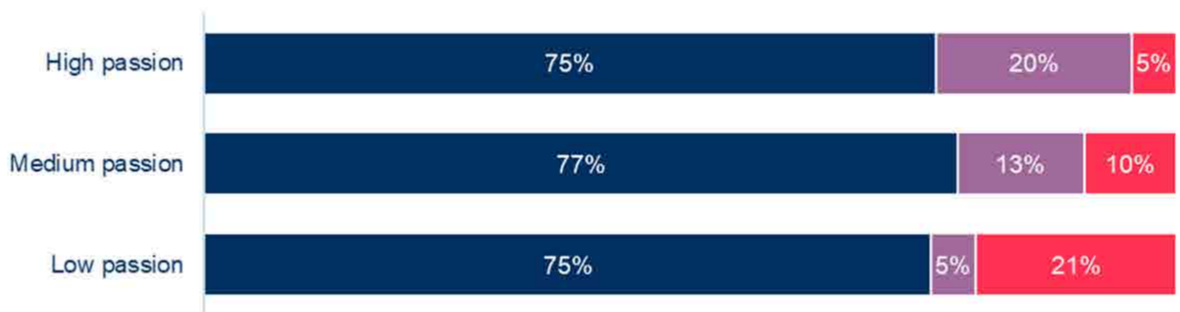
- Legal:
  - Overall 88% had used at least one legal source to access audiobooks.
  - **76%** had used legal sources only.
- Illegal:
  - **24%** had used at least one illegal source to access audiobooks.
  - **12%** had used illegal sources only to download audiobooks.
- Mixed:
  - **12%** had used a mix of legal and illegal sources.











Base: n=463 (downloaded or accessed audiobooks in the past 3 months, with those who selected ‘other’ or ‘not sure of source’ removed).

I8. And how is the way you download/access audiobooks typically split across the following sources? (average % of their time and average number of downloads)

Legality	Source	Average % of usage split
Legal	Paying a single fee to download individual audiobooks through services such as the Audible, Apple etc.	32%
	Pay for a subscription to a service that allows you listen to Audiobooks online (subscription to Audible, Scribd etc.)	28%
	Accessing promotional content made available for free by publishers or authors on authorised/official social media channels or websites (e.g. promotional chapters)	7%
	Accessing content made available online by a UK institution or library (e.g. at school, university, my local library)	10%
Illegal	Streaming audiobooks for free from sites such as YouTube	8%
	A free website which hosts or links to audiobooks I would otherwise expect to pay for (e.g. sites such as audiobookbay.net)	4%
	Ripping audiobooks from sites such as YouTube using an online converter (e.g. Y2mate, Flvto.biz) or a software, app or browser extension	1%
	A file hosting web site or cyberlocker (Zippyshare, Rapidgator etc.)	1%
	Bittorrent or another file-sharing or peer to peer service (e.g. uTorrent, eMule) where links to download files are typically available on sites such as The Pirate Bay, Torrentz, or Rarbg	1%
	Receiving the file(s) directly from someone else for free (e.g. Dropbox, WeTransfer, USB stick, email, messaging app)	1%
Other	Downloading/accessing for free from the internet, without really being sure where it comes from	3%
	Other	4%

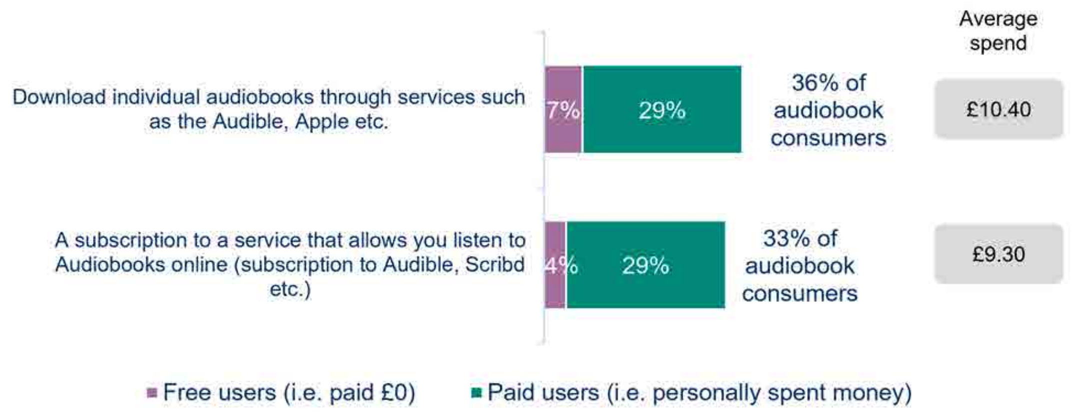
Base: n=496 (downloaded or accessed audiobooks in the past 3 months)

Paying for audiobooks

Those who had used a paid source to either download or access audiobooks were asked how much they had personally spent on each source.

- During the previous three months, around a third (36%) of audiobook consumers had downloaded individual audiobooks through services such as Audible, with most making a personal contribution towards a subscription (29%). They spent, on average, £10.40 each month.
- A similar proportion (33%) had a subscription to a service which allows them to listen to audiobooks online. They spent, on average, a similar amount to that spent on downloading individual audiobooks (£9.30 each month).

I9. Approximately how much do you personally spend each month on the below sources of downloading or accessing audiobooks? (Proportion of audiobook consumers over past three months using a paid source and average amount spent each month by users of that source)



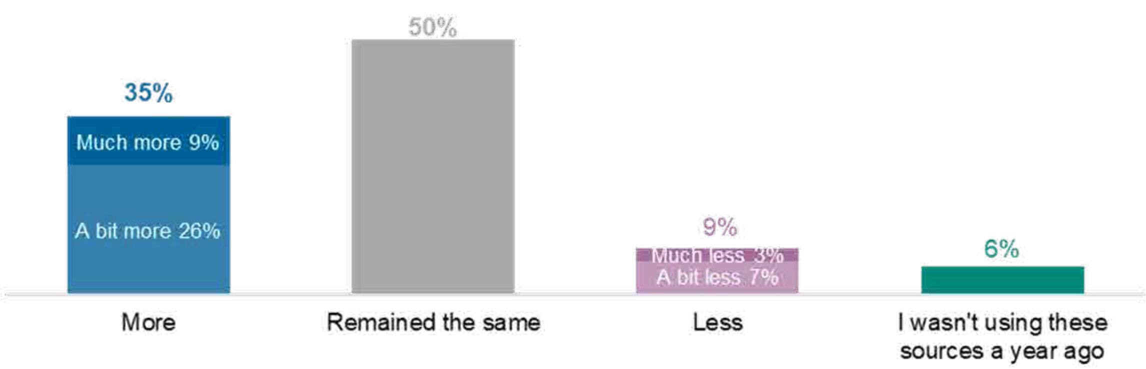
Base: n=496 (downloaded/accessed audiobooks), n=36-322 (those who used each of the sources to download/access audiobooks)

Change in use of illegal sources

Those who had used an illegal source to download or access audiobooks were asked how the use of these sources compares to the same point a year ago.

- Respondents were most likely to say their usage had remained the same (50%). This was followed by those who were using them more (35%), with relatively small numbers saying their usage was less (9%) or that they weren't using these sources at all a year ago (6%).

I10. You said you download or access audiobooks using illegal sources. Compared with the same point a year ago, would you say you are using those sources...?



Base: n=61 (downloaded or accessed audiobooks illegally)

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

Of those who had used illegal sources **more** in the past year, most had increased their overall consumption of audiobooks and therefore increased the frequency with which they downloaded/accessed audiobooks from such sources. A few also cited COVID-19, specifically how their illegal audiobook sources were easier to access during lockdown, especially with shops closed.

- *"I started listening to audiobooks more, due to lockdown and have found I enjoy this format. Previously I avoided audiobooks as I thought I'd get impatient if the narrator was a bit slow but this hasn't actually been a problem."* - Female, 35-44
- *"I usually buy direct from stores but haven't been in any for approximately 12 months."* - Male, 55+
- *"They have been easier for me to access in lockdown compared to other content."* - Male, 16-24

Most of those who had used illegal sources **less** for downloading/accessing audiobooks in the last year had lost significant interest in audiobooks, with some no longer listening to audiobooks at all.

- *"I prefer to read books rather than listen to a book being read."* - Female, 35-44
- *"Not using the books anymore."* - Female, 55+
- *"I don't tend to listen to many audiobooks."* - Female, 12-15

Few respondents had **started** to use illegal sources for downloading/accessing audiobooks in the last year. Those who did cited the need to fill time due to COVID-19 and lockdowns, as well as the convenience of the illegal sources they used, as being the reasons for doing so.

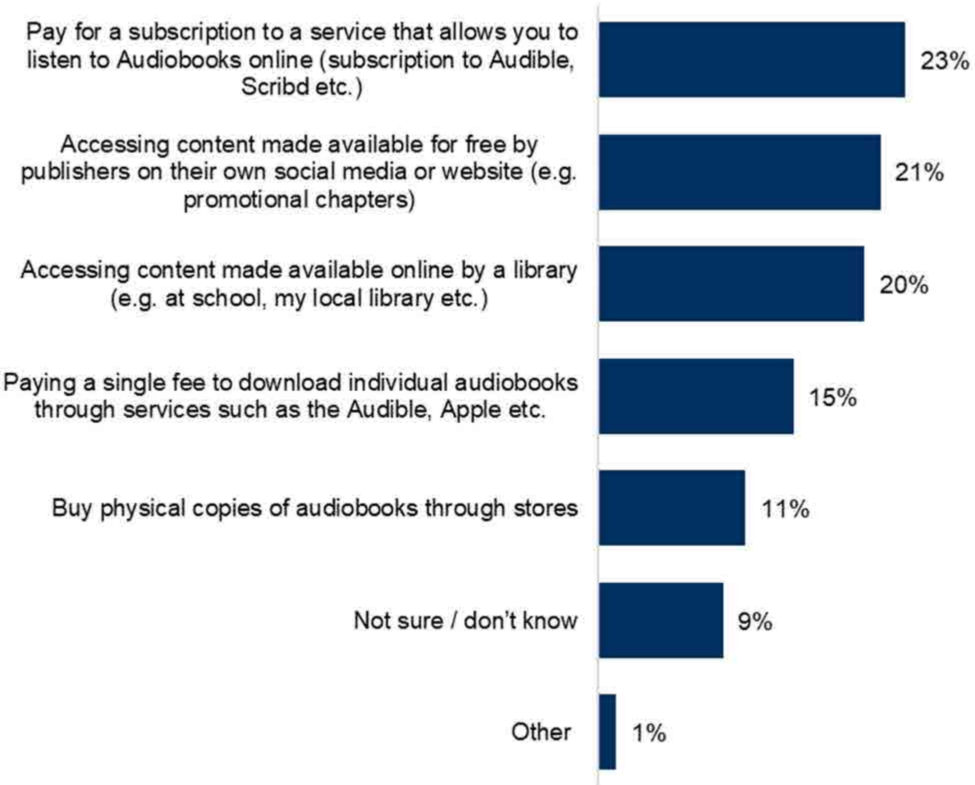
- *"Due to lockdown and the extra time."* - Male, 45-54
- *"The convenience these sources have for me."* - Female, 55+

Alternatives to infringement

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

- Encouragingly, the source respondents were most likely to use was a paid one with around a quarter (23%) saying they would "Pay for a subscription to a service that allows you to listen to Audiobooks online".
- This was followed by free sources with those who would access content for free which was either made available by a publisher (21%) or online from a library (20%).
- Other paid sources included "Paying a single fee to download individual audiobooks" (15%) and "Buying physical copies of audiobooks through stores" (11%).

I11. If audiobooks were no longer available to download or access via these sources, which other source, if any, would you go to instead? Please choose the method you think you would use most often. (%)



	Male	Female	12 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55 +
Paying a single fee to download individual audiobooks through services such as the Audible, Apple etc.	20%	9%	10%	17%	17%	19%	0%	20%
Pay for a subscription to a service that allows you listen to Audiobooks online (subscription to Audible, Scribd etc.)	13%	33%	35%	36%	21%	17%	22%	20%
Buy physical copies of audiobooks through stores	15%	7%	23%	33%	8%	0%	10%	10%
Accessing content made available for free by publishers on their own social media or website (e.g. promotional chapters)	19%	24%	22%	0%	21%	18%	23%	40%
Accessing content made available online by a library (e.g. at school, my local library etc.)	19%	21%	10%	0%	33%	17%	45%	0%
Other	3%	0%	0%	0%	0%	0%	0%	10%
Not sure / don't know	12%	6%	0%	15%	0%	30%	0%	0%

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

Base: n=61 (downloaded or accessed audiobooks illegally)

Technical appendix

Data collection methodology

Data was collected through an online survey with a representative sample of the UK 12+ population. This represents a departure from previous waves (i.e. prior to wave 9) where a mix of online and face-to-face interviews were used. There are a number of benefits to this approach:

- Given that the study is looking at **online infringement,** a concentration solely on those who have online access is wholly appropriate and allows for a more granular sub-group analysis and a more robust segmentation.
- It is possible, through our network of accredited online sample providers, to reach a **representative population of the target audience** (including the younger and older categories), therefore removing the need to supplement via offline means.
- Online data collection allows us to achieve significant **cost efficiencies.**
- The overall cost reduction provides some budget to make **improvements to the methodology.** More specifically, a qualitative element was included within the 2019 and 2020 OCI studies.

However, it is important to highlight that there are also limitations:

- It is possible that those with **lower levels of online engagement** are less likely to be included in the research, compared to approaches which use offline methods to specifically target them (e.g. CATI, CAPI).
- While broad trends are similar, care should be taken when making specific **comparisons** between the methodologies used in 2019-2021 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=2,874) to select from. Further quality checks were also introduced to minimise bias:

- At the point of recruitment, those shortlisted were sent a follow-up survey to verify responses to key questions (i.e. around illegal activity).
- All were assured of the confidentiality of their responses in the Community, and that action would not be taken against them.

An incentive was paid to each respondent who took part in the survey and a further one was paid to those who took part in the Online Community.

The questionnaire

The questionnaire used in this wave was in line with that used in 2019 and 2020. These three waves constitute a departure in some respects from previous waves (see the 2019 'Technical appendix' for more details). There were limited changes to this year's questionnaire which have been outlined below:

- A section looking at live streaming. This included the overall number of people who had watched live streams across a number of categories of content (e.g. musical performances, live comedy etc.). It also looked at what type of live streams they were watching (e.g. free or paid) and explored whether they were using legal or illegal sources to do this.
- Removal of a number of questions from the previous wave which looked at changes in consumption brought on by the COVID-19 pandemic.

Once the survey instrument had been developed, it was **rigorously tested** to ensure that it yielded both reliable and valid data outputs. This consisted of data verification checks and testing, as well as a pilot with a small sample of n=500. No changes were made following the pilot study so these respondents were retained in the final sample.

Achieved sample

Our sample included 5,000 respondents.

	Weighted	Unweighted
Male	49%	48%
Female	51%	52%
Other	0%	0%
12-15	7%	8%
16-24	10%	7%
25-34	16%	16%
35-44	15%	15%
45-54	16%	16%
55+	36%	38%
East	9%	9%
East Midlands	7%	8%
London	13%	13%
North East	4%	4%
North West	11%	11%
Northern Ireland	3%	2%
Scotland	8%	9%
South East	14%	14%
South West	9%	9%
Wales	5%	5%
West Midlands	9%	9%
Yorkshire and The Humber	8%	8%
White	90%	91%
Asian	5%	5%
Black	2%	2%
Other	0%	0%
Mixed/Multiple	1%	2%
Prefer not to say	0%	0%

	Weighted	Unweighted
Yes, I am a parent	29%	29%
Yes, I am a guardian	1%	1%
No	70%	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 95%.

Examples

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

Category	Source	Examples
Music (downloading)	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	A file hosting website or cyberlocker	MediaFire, Rapidgator etc.
	Downloading from sites such as YouTube using an online file converter or a software, app or browser extension	Y2mate, Flvto.biz
	Receiving file(s) directly from someone else for free	Dropbox, WeTransfer, USB stick, email, messaging app
	Receiving a link to download music made available by someone else	Social media or on a forum online
Music (streaming)	A file hosting website or cyberlocker	MediaFire, Rapidgator etc.

Category	Source	Examples
Film (downloading)	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	A file hosting website or cyberlocker	MediaFire, Rapidgator etc.
	Downloading from sites such as YouTube using an online file converter or a software, app or browser extension	Y2mate, Flvto.biz
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.

Category	Source	Examples
TV (downloading)	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	A file hosting website or cyberlocker	MediaFire, Rapidgator etc.
	Software, app, browser extension or online converter that allows you to download music (usually as an MP3) from online streaming websites such as YouTube, SoundCloud or Spotify	Y2mate, Flvto.biz, etc.

Category	Source	Examples
TV (streaming)	A file hosting website or cyberlocker	Openload, Zippyshare, MediaFire, Rapidgator etc.
	A free website which hosts or links to full-length films	WatchFree, Movie4k etc.
	A paid subscription to an IPTV provider that gives you access to content from apps/ services without you needing to sign-up for a separate (paid) subscription	Insight IPTV, Gears TV etc.

Category	Source	Examples
Live Sports	A file hosting website or cyberlocker	MediaFire, Rapidgator etc.
	A free website which hosts or links to live sports streams	Wiziwig, First Row Sports, Ronaldo7 etc.
	A paid subscription to an IPTV provider that gives you access to content from apps/ services without you needing to sign-up for a separate (paid) subscription	Insight IPTV, Gears TV etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	A broadcast by an individual (i.e. not an official source) on social media sites	WatchFree, Movie4k etc.
	Facebook, Twitter, Twitch, Periscope, TikTok or Snapchat, or via sites such as YouTube or Daily Motion	Insight IPTV, Gears TV etc.

Category	Source	Examples
Video Games	A file hosting website or cyberlocker	Zippyshare, Rapidgator, Nitroflare etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	Downloading modded versions of mobile games for free	APKDrone, APKAward

Category	Source	Examples
Software	A file hosting website or cyberlocker	Zippyshare, Rapidgator etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.

Category	Source	Examples
E-books	A file hosting website or cyberlocker	Zippyshare, Rapidgator etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	A free website which hosts links to e-books	Sites such as z-lib.org, libgen.li, chomikuj.pl

Category	Source	Examples
Digital Magazines	A file hosting website or cyberlocker	Zippyshare, Rapidgator etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.

Category	Source	Examples
Audiobooks	A file hosting website or cyberlocker	Zippyshare, Rapidgator etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	Ripping audiobooks from sites such as YouTube using an online converter or a software, app or browser extension	Y2mate, Flvto.biz

Category	Source	Examples
Digital Visual Images	A file hosting website or cyberlocker	Zippyshare, Rapidgator etc.
	A file-sharing or peer to peer service	uTorrent, eMule, BitTorrent, The Pirate Bay, Torrentz, Rarbg etc.
	Free websites which host free to use images	Pexels, PicJumbo or Pixabay etc.

About AudienceNet

Founded in 2011, AudienceNet's reputation for innovative "real-time" research grew steadily from its start-point in the music, entertainment and technology industries, through a wide range of both public and private sector organisations, governments, NGOs and philanthropic organisations. With offices in London, Washington D.C. and Melbourne, AudienceNet conducts research, around the clock, in more than 50 countries, spanning across six continents.

Central to our approach is using connected technologies to ensure that research provides the most value for our clients. We place great emphasis on designing research that is truly representative, triangulated (bringing together qualitative and quantitative insights), and time and cost-effective.

With our work regularly informing high-level decision-making and in the public eye, we take the utmost care in ensuring its validity and reliability. Recent projects have been presented at: The World Economic Forum (Davos); The European Parliament; The United Nations; The US House of Representatives and The US Senate. During the Obama Administration, we presented at the White House in the capacity of research partner to the Office for Science & Technology Policy.

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