Creative Industries
Policy & Evidence Centre
Led by nesta

Digital Culture: Consumption in Lockdown

Insights from the Consumer Tracking Study

THEMATIC REPORT | JULY 2020

Intellectual Property Office

AUDIENCE NET

Contents

SECTION 1

Introduction

SECTION 1

About the Cultural Consumption Tracker

The Creative Industries Policy and Evidence Centre (PEC) and the Intellectual Property Office (IPO) commissioned AudienceNet to design and conduct a weekly nationally representative survey of 1000+ consumers aged 16+ on how they engage with digital cultural content in the home.

Six weeks of data were collected across six consecutive weeks across April and May 2020, with plans for further data collection in July, August and September 2020.

As well as asking many questions drawn from the IPO's Online Copyright Infringement (OCI) Tracker, conducted on 9 occasions since 2010, enabling some historical comparisons, the survey asks about time spent engaging with different content categories and about impacts of the COVID-19 pandemic, including wellbeing.

BROADLY THE STUDY SOUGHT TO

01

Uncover if/how factors such as the following are impacting cultural consumption habits:

- More time in the home (as a result of movement restrictions)
- Lower levels of mental wellbeing (as a consequence of social distancing)
- The economic effect of the crisis

02

Provide creative businesses and cultural institutions with a detailed understanding of consumer needs in relation to their content, to:

- Help minimise negative consequences (e.g. increased infringement)
- Offer insight into new opportunities and ways of engaging with consumers during this period and beyond

THE MAIN FOCUS OF THE STUDY WAS ON FIVE CONTENT CATEGORIES:

- Music
- Film
- TV
- Video games
- E-publishing

However, a range of additional cultural activities, such as streaming filmed performances of theatre or watching art online, and other non-cultural activities were also investigated in terms of engagement and uptake during lockdown.

This is a final thematic report based on data from all six weeks. It investigates 6 key themes, making comparisons with OCI trend data, where relevant.

See the detailed methodology in the Appendix for more information on the data points used and how to interpret comparisons.

SECTION 1

Timeline of events

This timeline depicts key events that occurred during the time periods the six weekly surveys were asking respondents about.

MARCH

23 Monday 23rd
UK: Imposes nationwide lockdown

24 Tuesday 24th
Tokyo Olympics are officially delayed until 2021

25

26 Thursday 26th
UK: The National Theatre launches its National Theatre at Home programme

27 Friday 27th
UK: Boris Johnson, the UK Prime Minister, and Matt Hancock, the Health and Social Care Secretary, test positive for the virus

28

29

30

31

APRIL

01

WAVE 1

02 Thursday 2nd
Global cases surpass one million

03 Friday 3rd
UK: NHS Nightingale Hospital London opens

04

05 Sunday 5th
UK: Queen Elizabeth II makes a broadcast to the UK and Commonwealth nations

06 Monday 6th
UK: Boris Johnson, the UK Prime Minister, enters intensive care

07

08 Wednesday 8th
Wales: Mark Drakeford, the First Minister of Wales, announces that lockdown in Wales will be extended beyond the three weeks announced initially

09

10

11

12 Thursday 12th
UK: Death toll passes 10,000

WAVE 2

13

14

15 Sunday 15th
Northern Ireland: Arlene Foster, the First Minister of Northern Ireland, announces that the lockdown period will extend to the 9th of May in Northern Ireland

16 Monday 16th
UK: Foreign Secretary Dominic Raab announces that Lockdown measures are to be extended by at least three weeks

17

18 Saturday 18th
One World Together at Home concert aired

19 Sunday 19th
UK: A UK version of the Together at Home concert is aired on BBC One

WAVE 3

20

21

22

23 Thursday 23rd
UK: The Big Night In telethon that aired on BBC One raises £27 million

24

25 Saturday 25th
UK: The death toll surpasses 20,000

26

WAVE 4

27

28 Tuesday 28th
Scotland: Wearing face coverings in public places is recommended by The Scottish Government

29

30

31

SECTION 1

Timeline of events

MAY

WAVE 5

01

02

03

04

05 Tuesday 5th
UK: The UK COVID-19 death toll becomes highest in Europe

06

07 Thursday 7th
Scotland: Lockdown restrictions are extended for three more weeks in Scotland

08 Friday 8th
Wales: Mark Drakeford, the First Minister of Wales, announces a three week extension to the lockdown with adjustments such as the opening of libraries, tips and garden centres

09

10 Sunday 10th
UK: Boris Johnson, the UK Prime Minister, announces first steps of easing the lockdown

WAVE 6

11

12 Tuesday 12th
Northern Ireland: A five-stage plan for ending lockdown is released by the Northern Ireland Executive

13

14 Thursday 14th
Northern Ireland: The first steps for easing lockdown in Northern Ireland are announced

15

16

17

18 Monday 18th
Scotland: Nicola Sturgeon, the First Minister of Scotland, reveals plans to begin easing lockdown restirctions in Scotland

19 Tuesday 19th
Northern Ireland: Lockdown measures are eased further, with groups of up to 6 people allowed to meet outside

20 Wednesday 20th
UK: For the first time since March the number of people hospitalised with COVID-19 falls below 10,000

21 Thursday 21st
Scotland: Nicola Sturgeon, the First Minister of Scotland, reveals the four-phase "route map" to ease lockdown restrictions in Scotland from May 28th, including allowing people from separate households to meet outside.
Northern Ireland: Plans to reopen schools in Northern Ireland revealed

22

23

24 Sunday 24th
England: Plans for the phased reopening of schools are confirmed by Boris Johnson, the UK Prime Minister

SECTION 2

Summary & Conclusions

SECTION 2

Executive Summary

THEME #1
THE IMPACT OF LOCKDOWN ON CULTURAL CONSUMPTION

Lockdown appears to have grown the audiences for digital cultural content. All core categories saw increases in the proportions accessing them in Wave 1 of this study, compared to 2019 levels. This was especially high for those streaming. Overall, the category with the highest proportional increases (across both streaming and downloading) was film.

Looking at consumption across socio-economic differences, while the proportions consuming generally increased for all socio-economic groups, in some categories the rate of increase was lower among those classified as C2DE (as opposed to ABC1[1])). The result of this (for some categories) was the widening of the gap, which was already present, in digital cultural consumption between these two groups. This was particularly the case for TV streaming.

Likelihood to consume content also differed based on personal COVID-19-related circumstances (e.g. if they were working from home, still working outside the home, self-isolating etc). Across all content categories those who were working from home (either all the time or more than usual) were more likely to consume content than those who had stopped working (e.g. furloughed) or were working outside the home. Those who were self-isolating were generally the least likely to consume content.

THEME #2
CONTENT CREATORS

In week 1, half (50%) of respondents indicated that they create and post their own (video, written, audio) content online (e.g. posts on Instagram, YouTube, TikTok, Facebook, Pinterest, Soundcloud, Gfycat).

The pandemic has led to an increase in content creation for 4 in 10 (38%), with 17% of this group reporting that they had taken it up for the first time, whereas half (52%) said their content creation was unchanged. Increased production since the pandemic was significantly higher among younger people (16-24 year olds), with the 55+ having the highest proportion of first time content creators (26%).

Week-on-week, approximately a quarter of respondents reported creating and posting content online within the previous week. By the end of the study, more of our cohort had become content creators, with a 6% increase in the overall proportion who had ever done so (going from 50% to 56%).

In terms of the behaviours of content creators across the weeks, there were few differences by gender, instead they were correlated with age. Younger respondents (16-34) were more frequent creators, for both daily and weekly sharing. This age group also tended to be more consistent in their actions across the weeks.

THEME #3
STREAMING VS. DOWNLOADING – MUSIC, FILM, TV

Looking at the proportions streaming vs. downloading across music, film and TV, the general trend present in the OCI over the past 5 years continued (Leung et al, 2020). For all three categories, the proportions streaming were somewhat ahead of downloading. The increase in the proportion streaming in the previous 3-months in Wave 1 of this study was, compared to OCI 2019, also considerably steeper for streaming compared to downloading.

Across the weeks, interestingly, all three categories saw peaks in the proportions both streaming and downloading in week 2 (which asked about the 13th-19th April). After this, the proportions downloading reduced, falling below week 1 levels for music and film. While the proportions streaming also declined post the peak, they were comparatively more stable.

In terms of age, younger age groups (especially 16-24 year olds) generally tended to be more engaged, with higher proportions downloading and streaming. Across the weeks, increases in downloading and streaming were generally more common among younger age groups, however some categories and methods of access also saw increases across other age groups.

[1]These were assigned using NRS social grades using occupation information gathered from the survey. ABC1 are those who have an occupation which is 'higher managerial, administrative and professional', 'intermediate managerial', 'administrative and professional' or 'supervisory, clerical and junior managerial, administrative and professional'. C2DE include those who are: 'skilled manual workers', 'semi-skilled and unskilled manual workers', 'state pensioners, casual and lowest grade workers, unemployed with state benefits only'.

SECTION 2

Executive Summary

THEME #4
ILLEGAL VS LEGAL

When comparing data points on the proportions who had used at least one illegal source (in the previous 3-months) to access content pre lockdown (in the OCI 2019) with those doing so during lockdown (in the week 1 survey), these either remained consistent or decreased in most categories. The exceptions to this were video games and music downloading which both experienced increases (+6% in video games and +3% in music downloads).

In terms of weekly consumption during the study, the proportions of respondents who had used at least one illegal source to access content varied considerably by category. Music downloading generally had the highest proportion using illegal sources, while music streaming had the lowest.

Many categories exhibited a similar pattern whereby the levels of infringement were highest in week 1 and then declined over the course of the study. Some saw more variation across the weeks (video games and e-publishing categories).

The highest volume of content consumed in all categories was in the first week of the survey, after which it tended to decline. For some categories, this was also the peak in terms of the volume of illegal content accessed. More specifically, the illegal volume tended to decline from week 2 onwards.

THEME #5
NON-TRADITIONAL CONSUMPTION

A range of non-traditional cultural activities were included in the study. Here we focus on engagement with video games (playing multiplayer games themselves and/or watching e-sports or live streams), watching filmed performances (i.e. of theatre, concerts and/or dance shows online) and looking at art online (e.g. paintings and photographs).

Between 3 and 4 in 10 of our sample had "ever" engaged with video games either by playing multiplayer games or watching e-sports or streams when the study started (i.e. in week 1).

Engagement tended to skew towards males and younger age groups (16-34). These video game enthusiasts were consistent in their levels of consumption across the six weeks of the study.

Approximately half of respondents had "ever" watched filmed performances or looked at art online in week 1, with around a fifth of those having started undertaking each activity since the COVID-19 pandemic. There were only slight age and gender differences in the activities. While weekly engagement with the activities was slightly higher earlier on in the study, it generally sustained.

THEME #6
PHYSICAL PURCHASING

At the start of the study (week 1 - consumption between 2nd-12th April), for each category, consumption via physical products such as music CDs or vinyl and DVDs or Blu-Rays of films/TV shows was the least common method of access by some way. This was broadly in-line with physical purchasing trends captured in previous waves of the OCI. However, lockdown appears to have encouraged a greater number of people to make physical purchases. While this method (largely) remained somewhat behind other means of access, there was a notable uplift for all categories. For most, there was a peak in the proportion who had made physical purchases in week 2, after which there was a steady decline, however levels remained above those reported in week 1. For categories within publishing (i.e. books, magazines and audiobooks), the increase led to physical purchasing being as common as (and at times more so than) digital consumption.

Encouragingly for retail within the creative industries, the increase in the number of people making physical purchases was largely driven by younger age groups (16-34 year olds). These groups generally tend to be heavy consumers of cultural products and services through digital methods, so lockdown may have led to a broadening of their tastes and preferences.

SECTION 3

Thematic Analysis

THEME 01

The impact of lockdown on cultural consumption

This section looks at changes in consumption pre and during lockdown. It also looks at the impact of the lockdown on the digital divide and differences in consumption according to the pandemic-related personal circumstances of consumers.

OVERALL CONSUMPTION

Looking at 3-month data points captured in the 2019 OCI study and those in Wave 1 allows us to investigate the impact of lockdown on the proportion of people accessing cultural content. More specifically, we can look at the proportion who accessed content in the previous 3-months as of May 2019, and those who had done so in April 2020. Comparative data is available only for four of our five core content categories (i.e. music, film, TV and video games) due to changes in 2020 with how e-publishing data is captured.

Lockdown appears to have resulted in even more cultural content consumers. Looking at Wave 1 3-month data, other than music, all categories saw at least some increases in the proportions who had downloaded them. Increases were more pronounced (in all categories) for the proportions streaming. Overall, film saw the sharpest increases in both the proportions downloading and streaming (+13% and +20% respectively).

The same category data by socio-economic status (i.e. NRS social grades of ABC1 and C2DE[1]) shows that while the proportions consuming content increased regardless of socio-economic status, for some categories this increase occurred at a slower rate for those classified as C2DE (as opposed to ABC1). This was the case for streaming TV programmes/episodes in the previous 3-months, where the gap between ABC1 and C2DE rose from 6% in the OCI 2019 to 11% in the first wave of this study. The gap also widened, but to a smaller extent, for downloading music (where it increased from 3% to 6%) and for streaming music (from 4% to 7%).

COVID-19 WORKING STATUS

During the six-week duration of the study, each week respondents were asked about changes in their personal circumstances (e.g. were they working from home, had they been furloughed, were they self-isolating). Those who were working from home (either all the time or more than usual) were consistently more likely to engage with content online at least once in a week when compared to those who had stopped working completely (i.e. were furloughed) or were still working outside of their home.

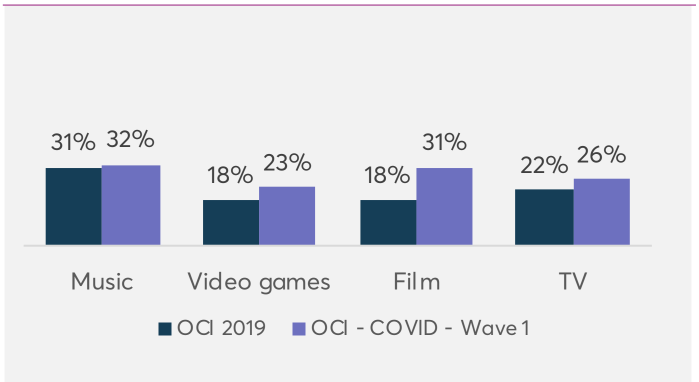
Those who were self-isolating were generally least likely to engage with any content of the categories in question - the main exception being e-books. Age is likely to be an important consideration in this – of those self isolating over half (56%) were 55+, a group who, compared with their younger peers, were generally less likely to engage with cultural content in many of the categories in question.

[1]ABC1 includes those who have an occupation which is ‘higher managerial, administrative and professional’, ‘intermediate managerial’, ‘administrative and professional’ or ‘supervisory, clerical and junior managerial, administrative and professional’. C2DE include those who are: ‘skilled manual workers’, ‘semi-skilled and unskilled manual workers’, ‘state pensioners, casual and lowest grade workers, unemployed with state benefits only’.

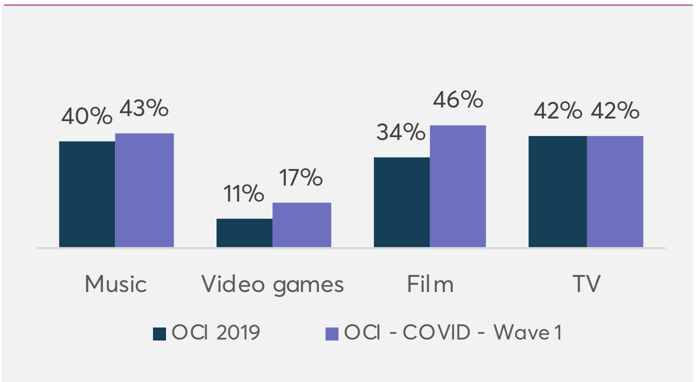
THEME 01

The impact of lockdown on cultural consumption

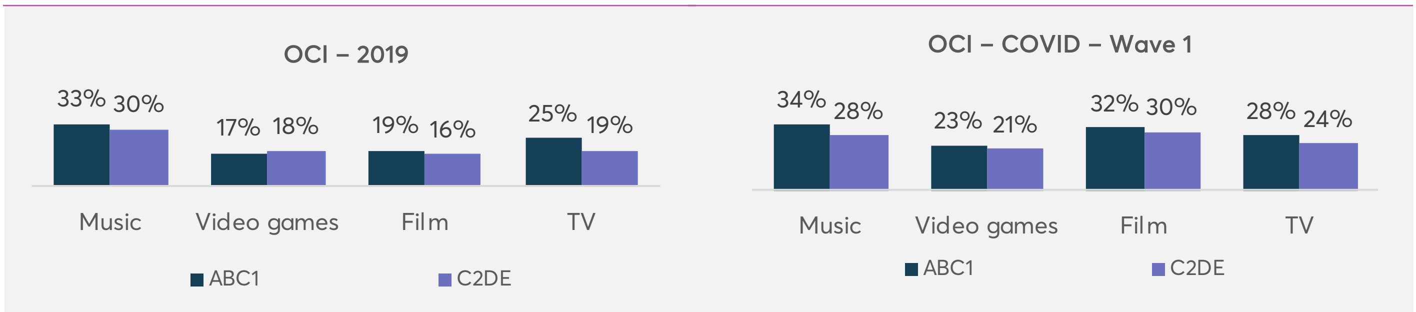
Proportion of total sample who had downloaded content in these categories in the past 3-months



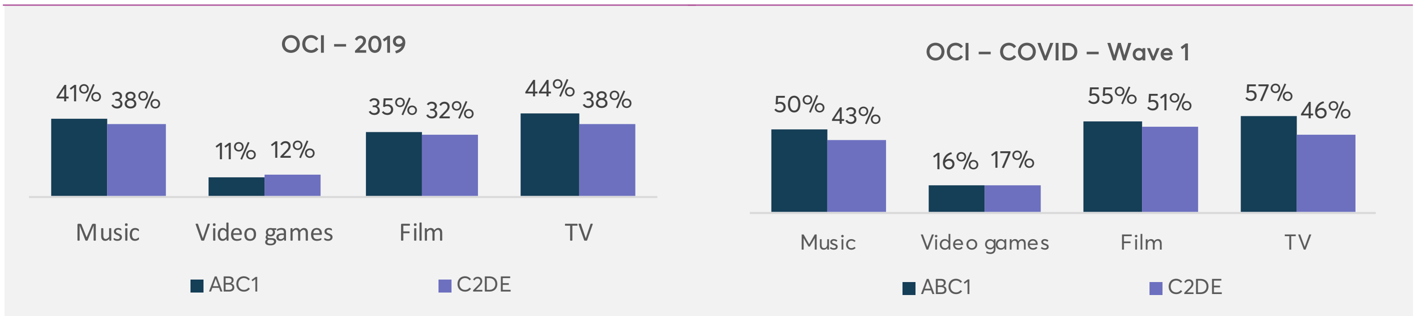
Proportion of total sample who had streamed content in these categories in the past 3-months



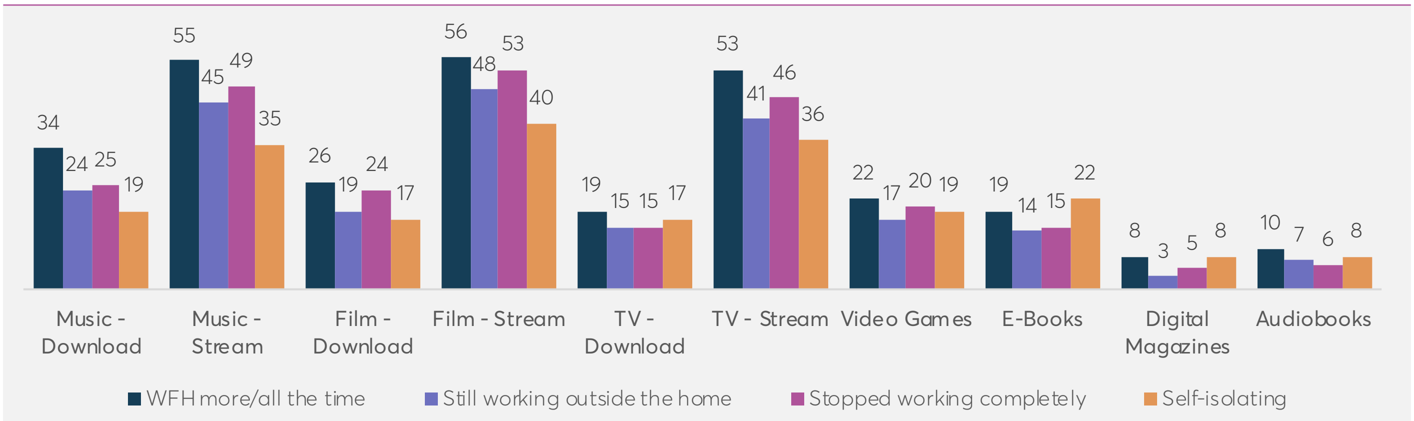
Proportion of total sample who had downloaded content in these categories in the past 3-months (by SEG)



Proportion of total sample who had streamed content in these categories in the past 3-months (by SEG)



% of total sample who had accessed content in these categories in wave 1 during the previous week (by working situation during lockdown)



THEME 02

Content Creators

This section looks in detail at the proportion of respondents who created and shared their own content across the 6 weeks.

CONTENT CREATION BEFORE THE PANDEMIC

In week 1, respondents were asked how frequently they created and posted their own (video, written, audio) content online (e.g. posts on Instagram, YouTube, TikTok, Facebook, Pinterest, Soundcloud, Gfycat) prior to the pandemic. Overall, half (50%) reported to having done so.

While, for the highest proportion of content creators, their frequency of creating remained the same as pre-pandemic (52%), as many as 4 in 10 reported an increase (with 21% doing so more than before and 17% doing so for the first time).

Looking across age groups, frequency of creating had accelerated much more among 16-24 year olds compared to others, with over a quarter (27%) reporting that they were creating their own content more now.

Those aged over 55 recorded the highest proportion of new content creators, with a quarter (26%) saying they did not do this before the pandemic - at least 10 percentage points more than any other age group.

WEEKLY CONTENT CREATION

Each week respondents were asked how often, if at all, they had created and posted their own content. Those who had did so least once a week and remained consistent across the waves, at around a quarter (between 24%-26%).

Younger respondents were more likely to be weekly content creators, with the two youngest age groups (16-24 and 25-34) consistently having greater proportions of those who had created and posted their own content across the 6 week period compared to the older age groups.

- Those aged 25-34 were, in most weeks, the age group most likely to create content at least once in a week. The proportion doing so increased from 36% in week 1 to between 41-45% for the proceeding weeks.
- Those aged 16-24 saw the proportion creating weekly fluctuate week-to-week, going from a high of 45% in week 2 to a low of 34% in week 5.

The content creation behaviour of the older age groups (35-55+) remained more consistent across the weeks, with fairly minimal increases or decreases in uptake.

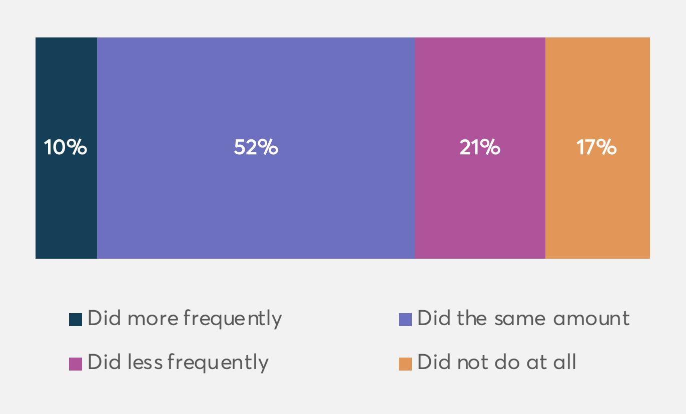
NEW CONTENT CREATORS DURING THE PANDEMIC

By week 6, all age groups, except the oldest (55+), had seen at least a 10 percentage point reduction in the proportions saying they had never created their own content, indicating that around 10% of each of these age groups had created and posted content for the first time during these 6 weeks. The proportion of those aged 55+ who had never created content remained fairly consistent across the 6 weeks with a majority, between 64%-70%, still never having done so.

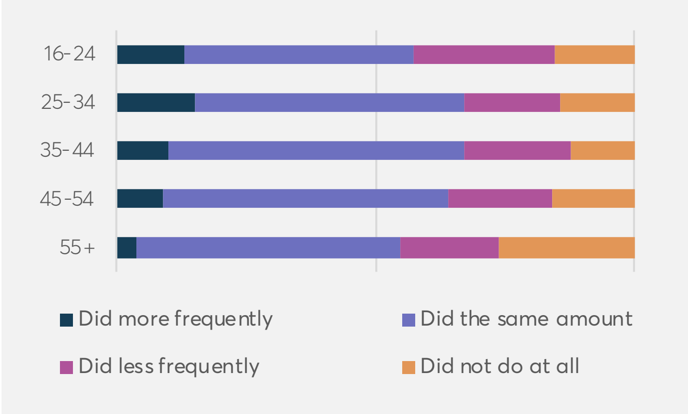
THEME 02

Content Creators

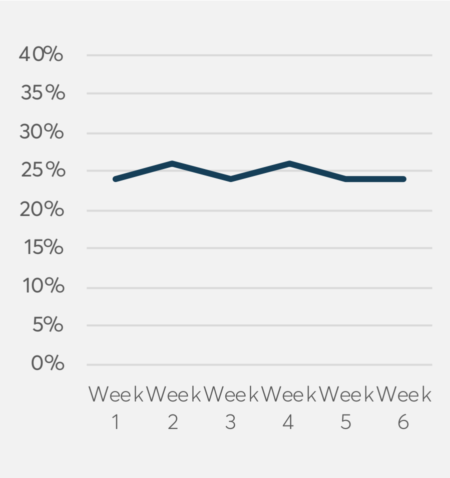
Content Creation Before COVID-19 Among Content Creators In Week 1



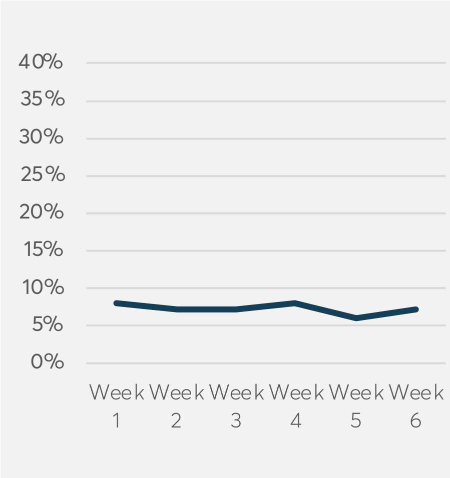
Content Creation Before COVID-19 – Age (Total Sample)



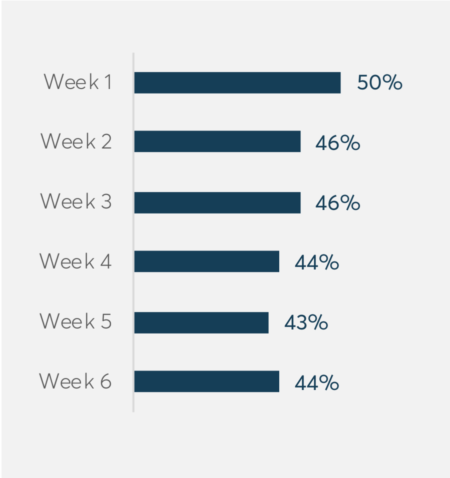
Weekly Content Creation (Total Sample)



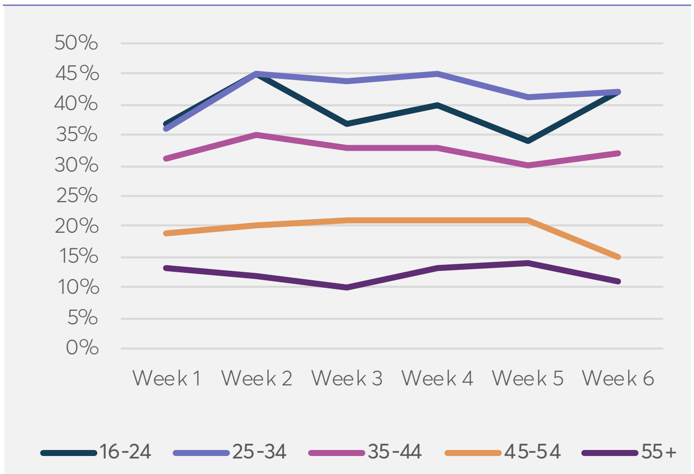
Daily Content Creation (Total Sample)



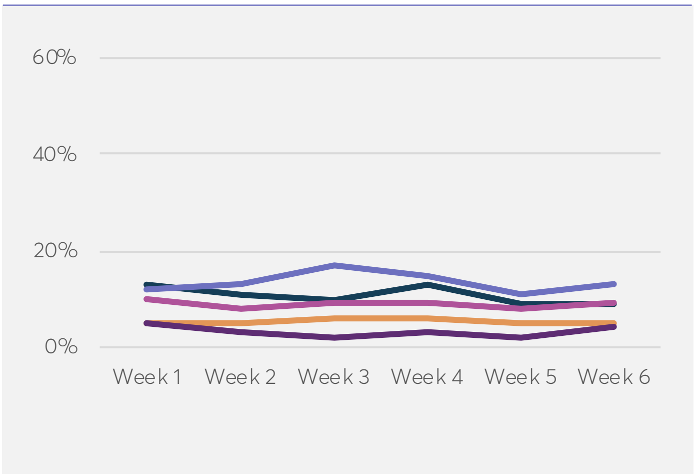
'Never Done This' - Weekly[1]



Weekly Content Creation – Age



Daily Content Creation – Age



[1]Small fluctuations are due to survey attrition (e.g. in week 5 the sample size was n=1,947, in week 6 it was n=1,074)

Base: Content Creation Before COVID-19 (n=2,033), Daily/weekly content creation (total sample – see appendix for number of respondents)

THEME 03

Streaming vs. downloading

This section looks specifically at streaming vs. downloading in categories where both are an option (i.e. music, film and TV). It looks at 3-month as well as weekly behaviours.

STREAMING VS. DOWNLOADING – BROAD BEHAVIOURS

Looking at 3-month data points captured in the 2019 OCI study and those in Wave 1 allows us to investigate the impact of lockdown on the proportion of people downloading and streaming music, film and TV. More specifically, we can look at the proportion who downloaded and streamed in the previous 3-months as of May 2019 vs. those that had done so in April 2020 (this comparison is only indicative as we cannot rule out the changes occurred after May 2019 but prior to lockdown in March 2020).

Following the trend of the past 5 years of the OCI tracker, streaming was the most common method of access for all three categories (i.e. music, film and TV):

- Between 26-32% of respondents reported that they had downloaded music, film and/or TV (in the previous 3-months) in week 1. Approx. double this number had streamed content in each category.
- For each category, the proportions for both streaming and downloading (over the previous 3-months) were higher in the week 1 data than the 2019 OCI. However the increase in the proportion streaming was somewhat higher than for downloading, suggesting that the trend substitution from downloading to streaming (Leung et. al., 2020) may have received a boost in lockdown. *See Theme 1 for more details.*

PROFILES OF STREAMERS AND DOWNLOADERS

The profiles of streamers and downloaders were fairly consistent when comparing 2019 OCI data with Wave 1 3-month data. Across all categories some broad themes emerged:

For **streaming:**

- A greater proportion of males than females were streaming, particularly for music.
- More of those in the youngest age group (16-24) were streaming compared to other age groups.

For **downloading:**

- Slightly more males tended to download than females.
- More popular among younger respondents, except for TV downloading, which tended to be more uniform across all ages.

WEEKLY STREAMING AND DOWNLOADING

In terms of weekly consumption during the study, the same trend maintained, with the proportions streaming somewhat higher than those downloading.

For both streaming and downloading, all three categories experienced peaks in week 2 (which asked about the period between 13th-19th April), recording their highest proportions.

Beyond this, the two methods of accessing content had different trajectories across the six-week period:

- The proportion downloading content reduced from week 2 onwards. For music and film it fell below week 1 levels, while it remain unchanged for TV.
- While the proportion streaming did decline slightly from the peak, levels were generally more stable for all categories across the remaining weeks. These remained above week 1 levels.

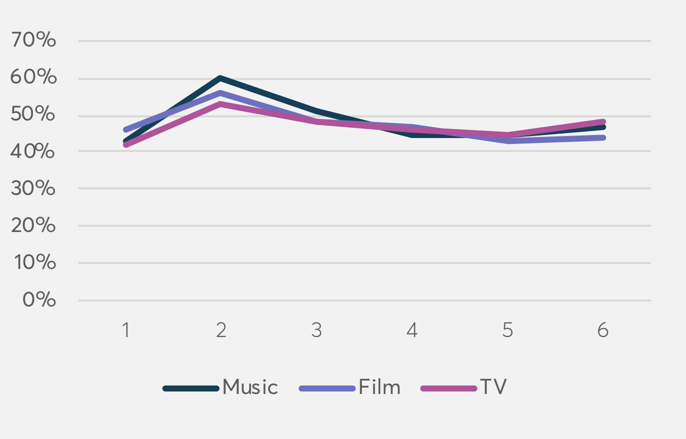
Demographic changes over the weeks:

- In the case of downloading, the largest increases across the weeks were among the younger age groups (particularly 16-24 year olds) for music and TV, whereas for film the increases were similar across all age groups.
- In the case of streaming, increases across the weeks for music, film and TV could be seen across most age groups, however these were more notable among 16-34 year olds compared to their older counterparts.
- In terms of gender, males remained more likely to consume content in all categories apart from downloading TV and/or films which was evenly split.

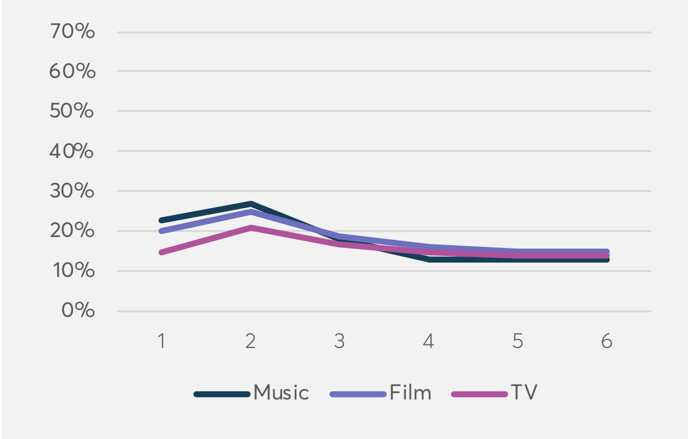
THEME 03

Streaming vs. downloading

Weekly Streaming



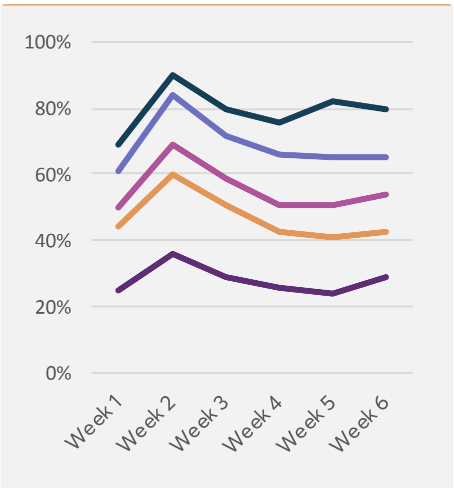
Weekly Downloading



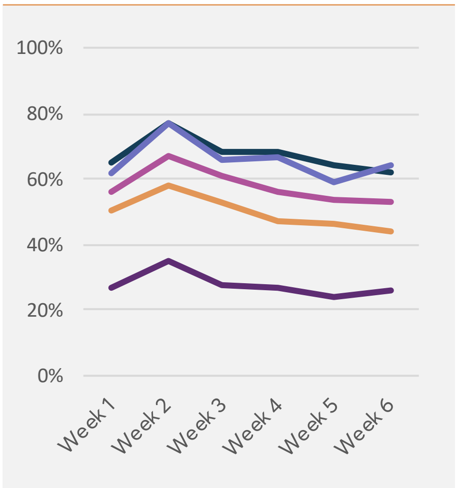
Weekly Streaming by Age

16-24 25-34 35-44 45-54 55+

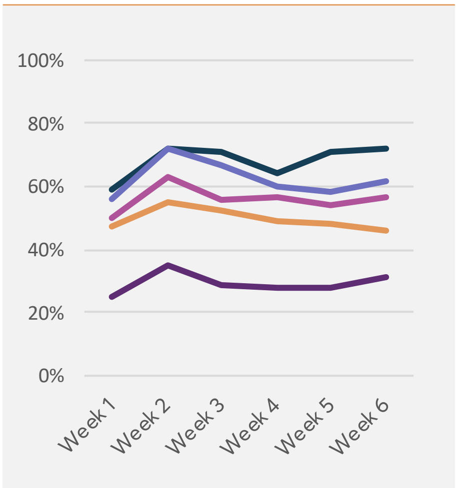
Music



Film

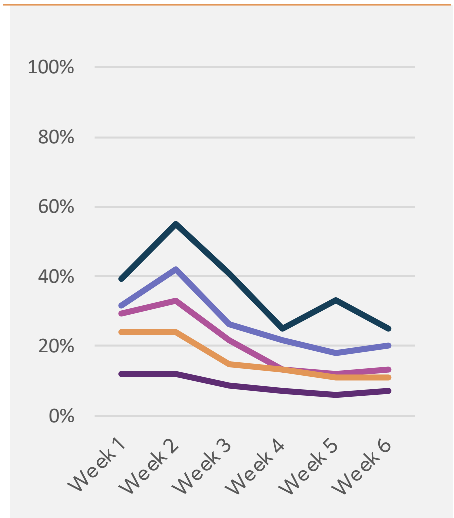


TV

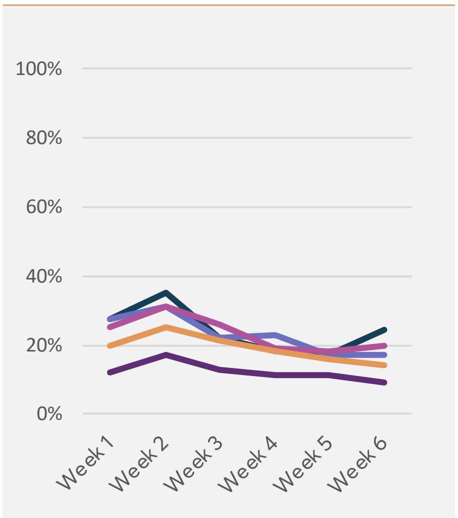


Weekly Downloading by Age

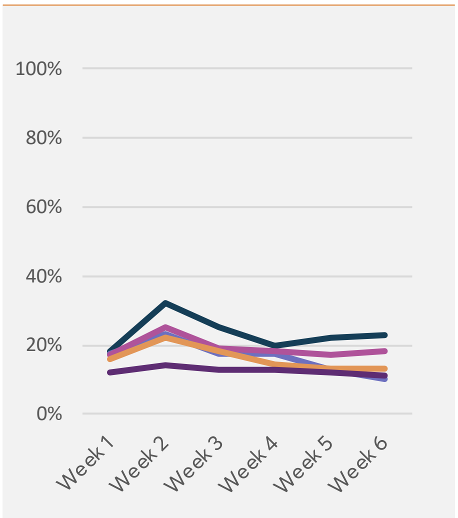
Music



Film



TV

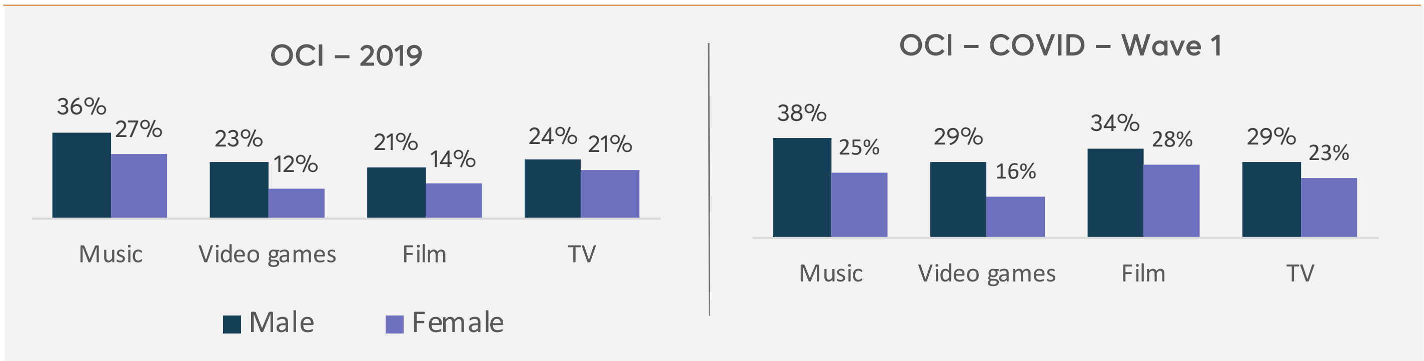


Base: Total sample – see appendix for number of respondents

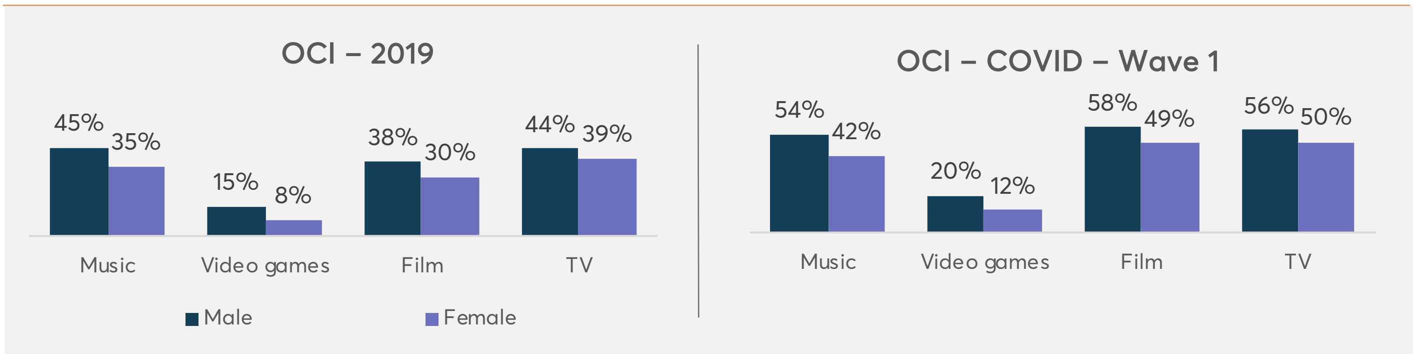
THEME 03

Streaming vs. downloading

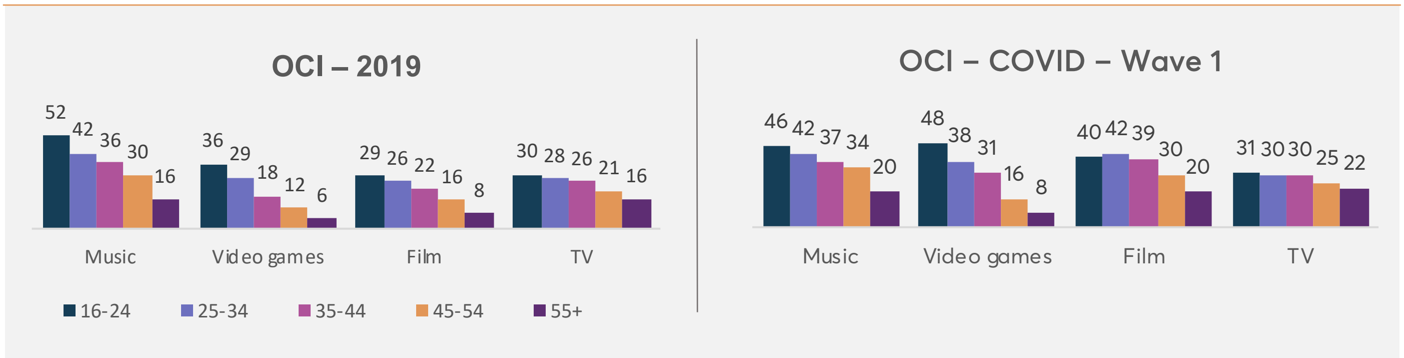
Proportion who had downloaded content in these categories in the past 3-months (by gender)



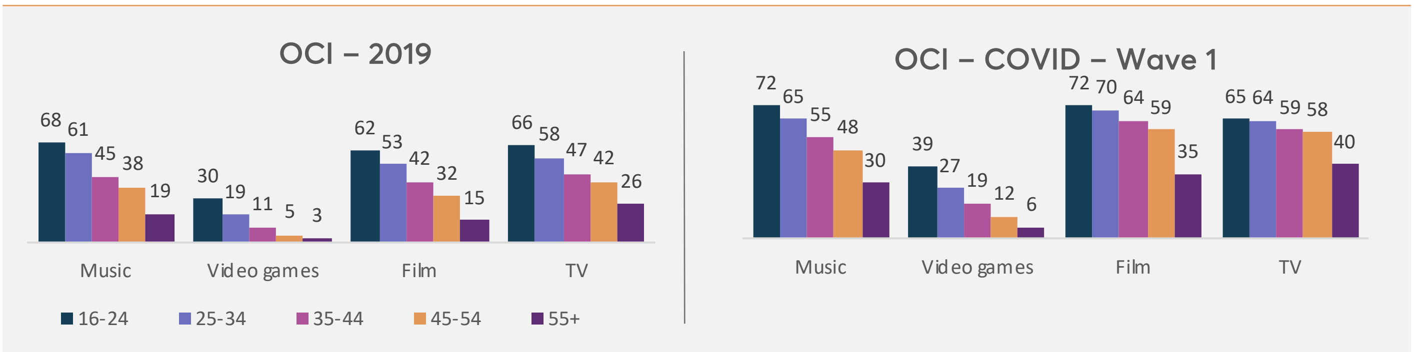
Proportion who had streamed content in these categories in the past 3-months (by gender)



% who had downloaded content in these categories in the past 3-months (by age)



% who had streamed content in these categories in the past 3-months (by age)



THEME 04

Illegal activity and lockdown

This section looks in detail at the level of infringement across categories as well as the volume of legal and illegal content consumed.

COMPARISONS WITH LOCKDOWN

Comparing the percentage of respondents who had used at least one illegal source to access content in the previous 3 months in Wave 1 of our survey with the 2019 OCI study in May 2019 may give an indication of changes that took place in lockdown. Comparative data is available for four of the five content categories only as the 2020 and 2019 surveys are not comparable for e-publishing.

The content categories can be divided into three groups in terms of how they changed between the two surveys:

- Those where the proportion consuming illegal content remained stable. This was the case for streaming music as well as downloading and streaming TV.
- Those where the proportion consuming illegal content decreased. This was the case for streaming films (-8%), downloading films (-4%) and TV streaming (-3%).
- The only categories where the proportion consuming illegal content increased were video games (+6%) and music downloading (+3%).

WEEKLY USE OF ILLEGAL SOURCES

In terms of weekly consumption during the study (i.e. as opposed to the 3-month period), the proportion of respondents who had used at least one illegal source to access online content varied considerably by category.

The lowest levels of infringement occurred in streaming music, which were negligible (i.e. between 0-2% each week).

Music downloading generally had the highest proportion of consumers accessing illegal content out of any category each week. The overall number downloading music illegally decreased over the six weeks of the study.

However, it is interesting to note that those using only illegal methods to do so increased from 9% in week 1 to 22% in week 4 after which it remained stable.

Many categories exhibited a similar pattern whereby the levels of infringement were highest in week 1 and then declined over the course of the study. This was the case for illegal film downloading where the proportion using illegal sources halved over the course of the study (from 24% in week 1 to 12% in week 6). Illegal film streaming also saw the level halve (from 14% to 7%). Illegal TV downloading and streaming levels were slightly lower than for film, but the pattern of declining levels from week 1 were the same (downloading went from 18% to 11% while streaming went from 11% to 5%).

In other categories, such as video games, e-books, digital magazines and audiobooks, the levels of infringement week-on-week were more variable.

VOLUME OF CONTENT CONSUMED

As well as the proportion of respondents who are using illegal sources, we also surveyed consumers as to how much content (both legal and illegal) they consumed. Streaming (i.e. for music, film and TV) is shown in terms of hours spent while downloads is the number of individual downloads.

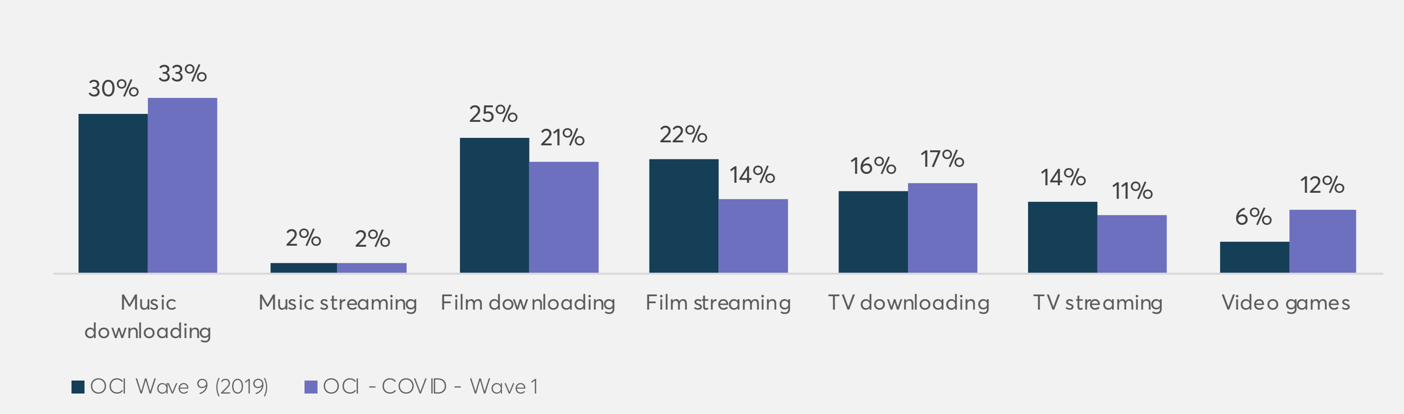
The highest volume of content consumed, both legal and illegal, in all categories was in the first week of the survey, after which it tended to decline. For music downloads there was a gradual decline from an average of 18 tracks downloaded in week 1, to 11 in week 3, dropping to 9 for each of the following weeks. Other categories had smaller declines after the first week, after which the amount of content downloaded or hours spent streaming remained broadly stable.

The first week was also the peak in terms of the volume of illegal content accessed in most categories, with it then staying at a lower level from week 2 onwards. Music had a high amount of illegal content downloaded for a slightly longer time period compared with other categories, with an average of 1.9-2.1 tracks downloaded in weeks 1 and 2 respectively, after which it declined to between 1.1-1.3.

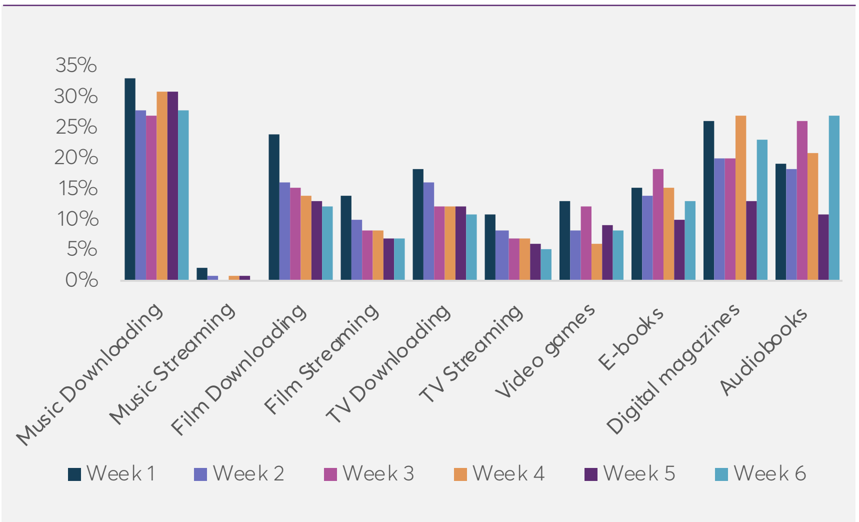
THEME 04

Illegal activity and lockdown

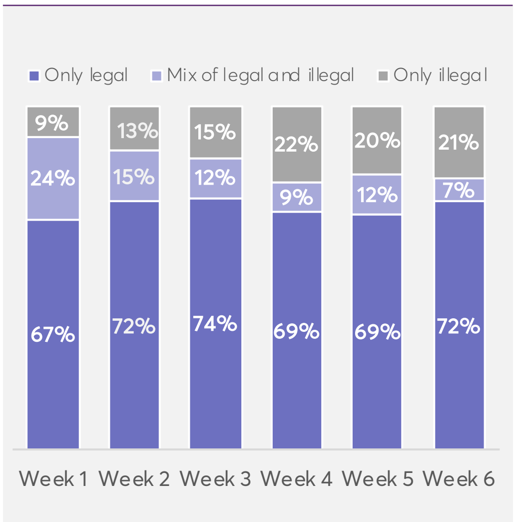
Used an illegal source at least once to access content in the past 3 months



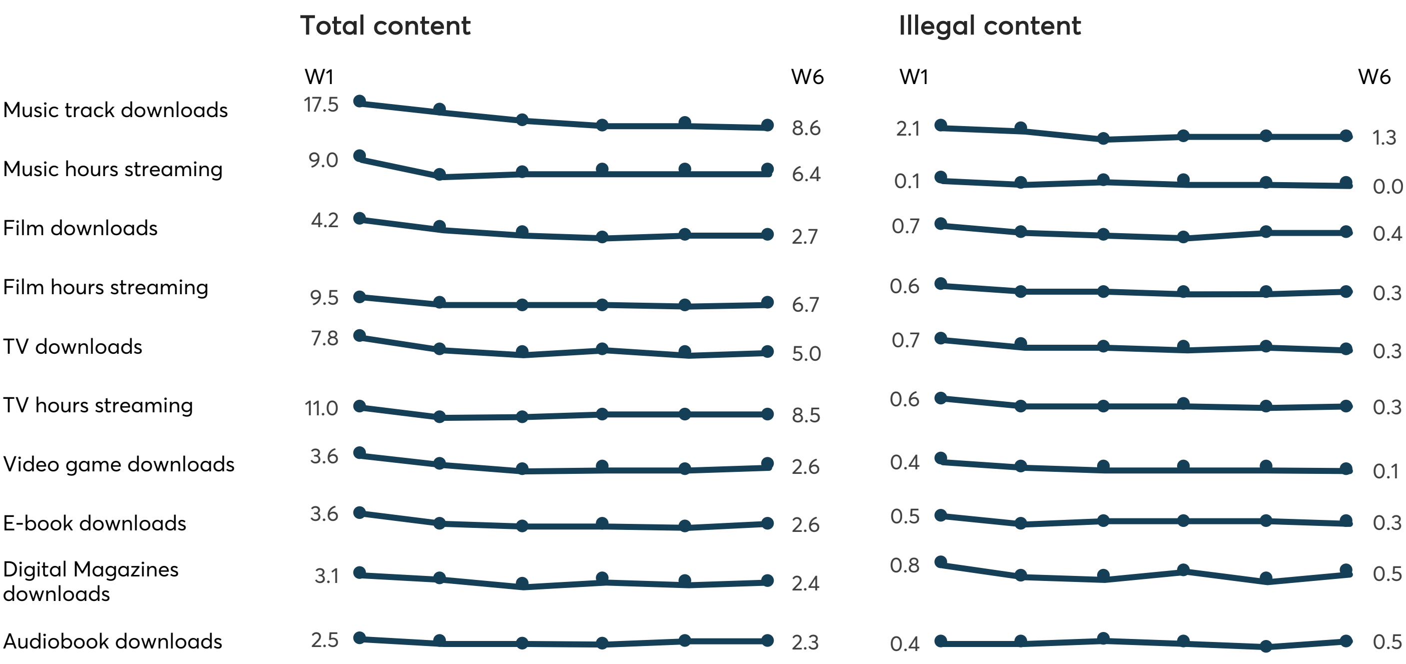
Used an illegal source at least once to access content each week



Use of illegal sources to download music



Average Volume Of Content Consumed (Each Week)



Base: Used an illegal source at least once in a week (music downloading = 134-931, music streaming = 514-1768, film downloading = 153-745, film streaming = 473-1889, TV downloads = 142-571, TV streaming = 510-1607, video games = 136-633, e-books = 120-660, digital magazines 95-201, audiobooks = 43-239)

THEME 05

Non-traditional consumption

This section looks at the frequency of engagement with less traditional forms of cultural consumption, such as watching others play online video games; watching filmed theatre performances or looking at art online.

CULTURAL ENGAGEMENT

Each week respondents were asked the frequency with which they had done each specific activity. In the first week they were also asked to compare against their consumption before the COVID-19 pandemic (i.e. had it increased, remained the same, decreased or was it something they had taken up since).

A range of non-traditional cultural activities were included in the study. The ones we focus on specifically here are engagement with video games (playing multiplayer games themselves and/or watching e-sports or live streams), watching filmed performances (i.e. of theatre, concerts and/or dance shows online) and looking at art online (e.g. paintings and photographs).

VIDEO GAMES

Around four in ten (37%) respondents had "ever" played online multiplayer video games when asked in week 1. Slightly fewer, roughly three in ten (26-29%), had "ever" either watched e-sports or live streams of people playing video games (e.g. on Twitch). A small number (5% across all three video game related options) had only taken them up since the pandemic.

Those who played games (or watched people playing them) were more likely to be:

- **Male** – In week 1, 45% of male respondents had "ever" played online multiplayer video games, 37% had watched live streams of people playing video games and 34% had watched e-sports. In each instance this was 17% more than female respondents.
- **Aged under 35** – The proportion who had "ever" played online multiplayer video games notably declined with age. It was especially high for those aged 16-24 (73%) and 25-34 (61%), with all other age groups below 50%. Smaller proportions watched e-sports and live streams, but they followed a similar pattern in terms of age.

It is interesting to note that the proportion who undertook these three gaming-related activities, especially the younger and male core audience, was consistently highly engaged throughout the six weeks of the research.

The proportion of male respondents who played multiplayer games daily remained at between 13-16% over all six weeks, while for those aged 16-24 it was between 25-33%.

FILMED PERFORMANCES OF THEATRE, CONCERTS AND/OR DANCE AND ONLINE ART

Approximately half of respondents had "ever" watched filmed performances (49%) or looked at art online (49%) when asked in week 1. As many as a fifth of those had started undertaking each activity since the COVID-19 pandemic.

The profile of those who undertook these activities had some similarities with the video game categories, but these differences in terms of age and gender were less pronounced:

- Male respondents were slightly more likely to look at art online (51% said they had ever done it in week 1 compared with 46% of females). The proportion watching filmed performances was the same for both males and females (48% of males and 49% of females).
- Again, younger respondents aged between 16-34 were more likely to have "ever" undertaken these activities. Between 58-62% of those aged 16-34 had "ever" watched filmed performances, while between 59-60% had looked at art online. For both activities, this gradually decreased among each older age group but remained relatively high, at 39% and 40% respectively, among those aged 55+.
- There is an indication that engagement with these activities was slightly higher earlier on in the study, with peaks in accessing them at least once a week in weeks 1 and 2, after which levels remained fairly consistent.
- The proportion that watched filmed performances weekly peaked at 19% in week 2 and decreased to 13%, its lowest point, in week 5.
- Looking at art online weekly went from 17% in weeks 1 and 2 to 13% in weeks 5 and 6.

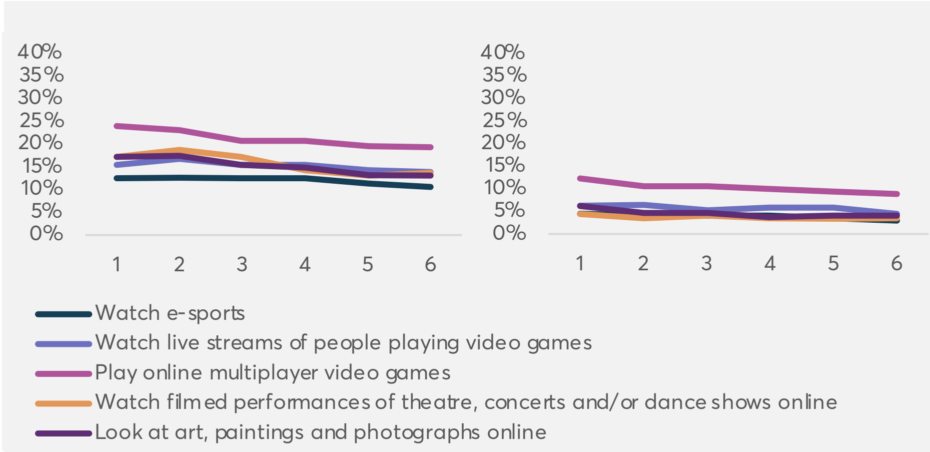
THEME 05

Non-traditional consumption

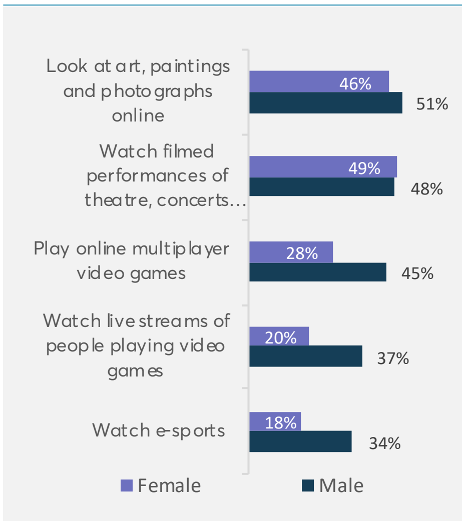
Ever Undertaken This Activity

Undertakes Activity (Weekly)

Undertakes Activity (Daily)

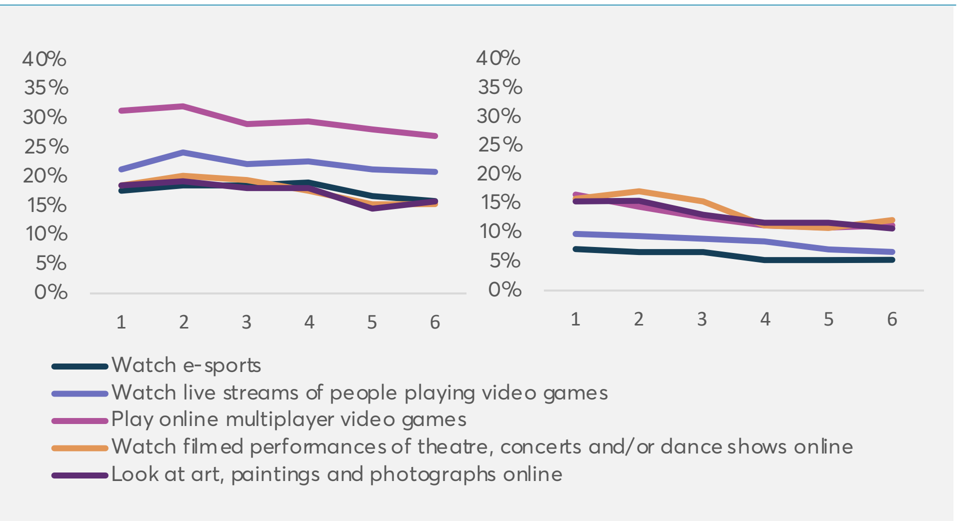


Ever Undertaken This Activity (Gender)

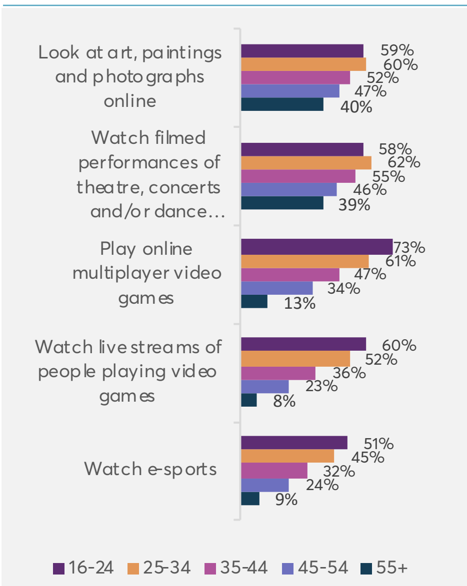


Undertakes Activity (Weekly, Male)

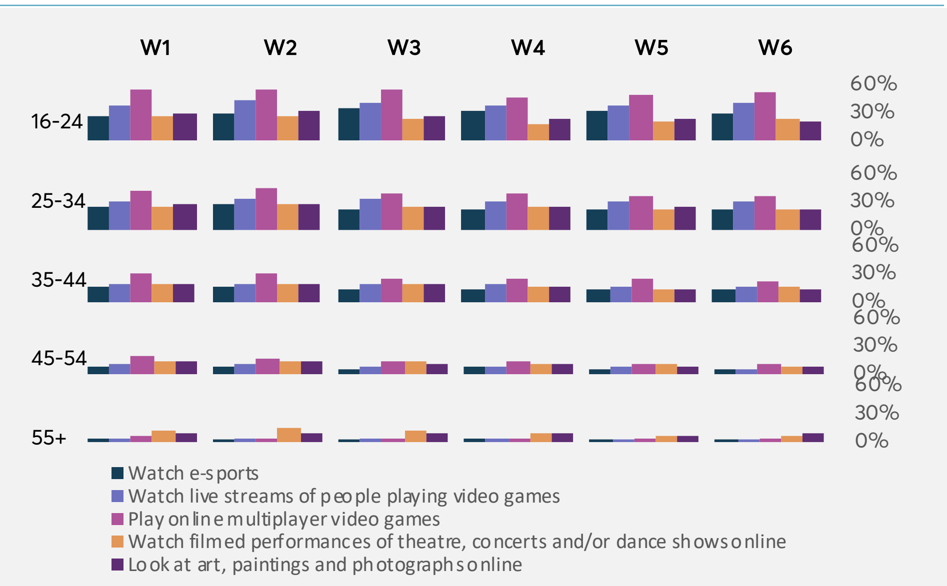
Undertakes Activity (Weekly, Female)



Ever Undertaken Activity (Weekly, Age)



Undertaken Activity (Weekly, Age)



THEME 06

Physical purchasing

This section looks at changes in levels of physical purchasing during lockdown.

PHYSICAL PURCHASING PRE AND DURING THE PANDEMIC

Respondents were asked, at the start of the study in week 1, if they had purchased physical products in the previous 3-months (as well as if they had streamed or downloaded products). Except for books and magazines, they were more likely to have interacted with content (e.g. music, films, TV and video games) online.

When compared with physical purchasing in the 2019 OCI study, which also looked at a 3-month time period, the proportion was slightly lower for music (it decreased by 5% to 15%) and was unchanged for TV, film and video games.

WEEKLY PHYSICAL PURCHASING

While (for most categories) the proportion purchasing physical copies (largely) remained somewhat behind online means of access (e.g. streaming or downloading), there was a notable uplift for all categories across the six weeks surveyed.

This was particularly the case between weeks 1 and 2 where there was a sharp increase. At an overall level, film and TV had the largest increases in those who had made physical purchases in week 2, with the proportion more than doubling for both categories.

After the peaks in week 2, each category saw a steady decline, however levels remained above those reported in week 1 for the remainder of the study. For categories within publishing (i.e. books, magazines and audiobooks), the increase led to physical purchasing being as common as (and at times more than) digital consumption.

WEEKLY PHYSICAL PURCHASING - DEMOGRAPHICS

The uplift between waves 1 and 2 in those making physical purchases occurred in all age groups. However, it was largest among younger age groups (16-34-year olds). After week 2 they also remained, in most categories, those most likely to have made physical purchases. All age groups, except for the over 55s in the TV category, retained a level of physical purchasing higher than that in week 1 across the remaining weeks.

Age differences were particularly pronounced in the video games category, where those aged 16-34 were much more likely to have made purchases. In addition to this, there were also notable differences by gender, as a greater number of males made physical purchases each week, with the proportion being approximately double that of females across each of the 6 weeks. This gender ‘gap’ was consistent with that present in other ways of obtaining or engaging with video game content (e.g. by downloading/accessing, playing online multiplayer games, watching e-sports or livestreams of video games.)

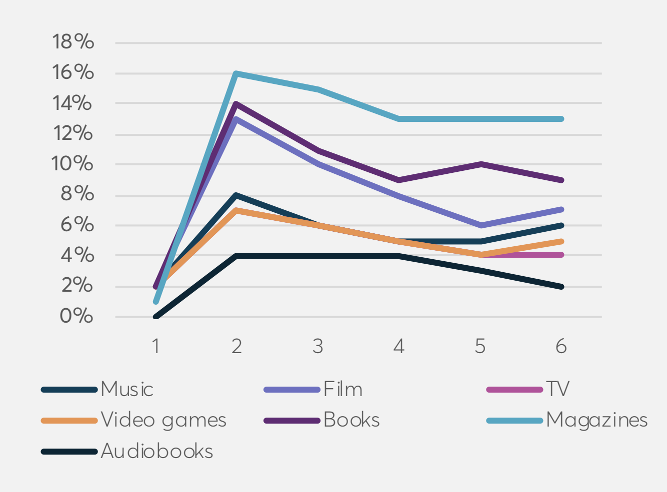
While books followed a similar pattern as other categories, with younger age groups (i.e. 16-34 year olds) generally most likely to make physical purchases, the gap between them and other age groups (35+ year olds) was less pronounced.

Magazines were unique when it came to age. The proportions making physical purchases from week 2 onwards were greater among older age groups - particularly those aged 55+.

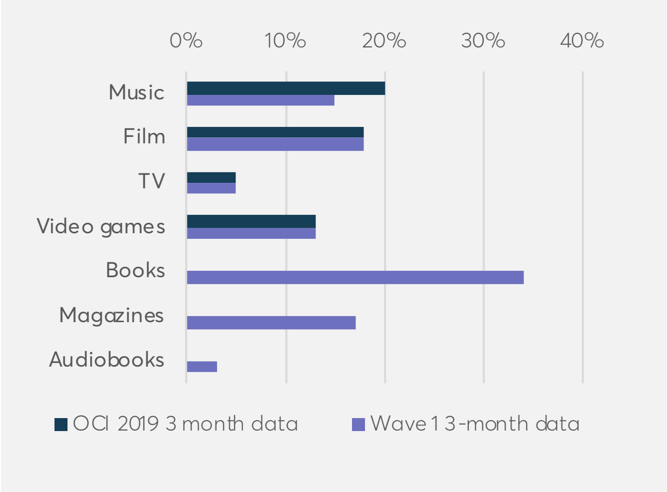
THEME 06

Physical purchasing

Weekly Physical Purchases



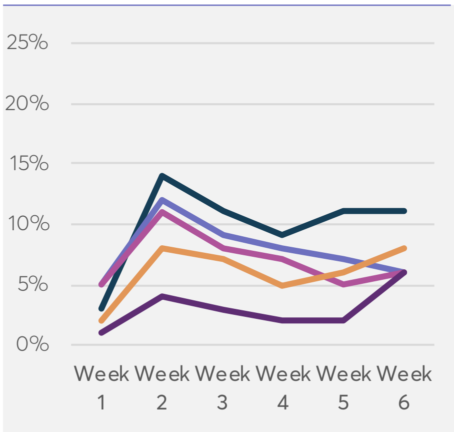
3-Month Physical Purchases (OCI and Wave 1 data)



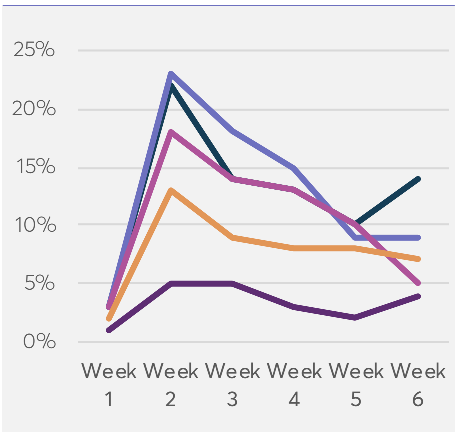
Weekly Physical Purchasing by Age

16-24 25-34 35-44 45-54 55+

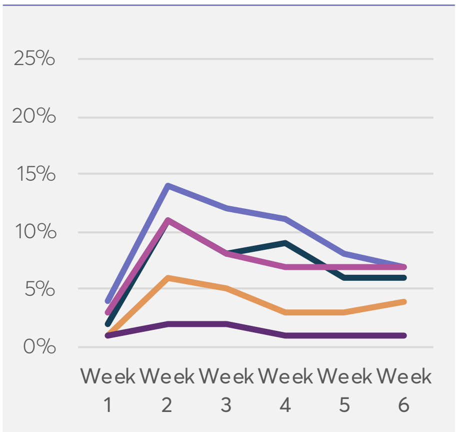
Music



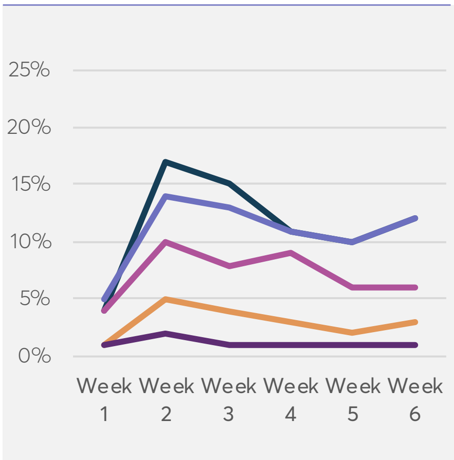
Film



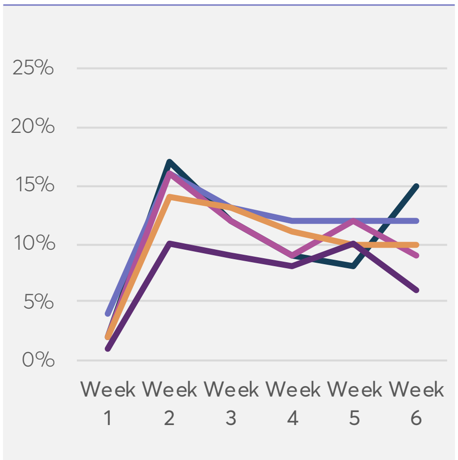
TV



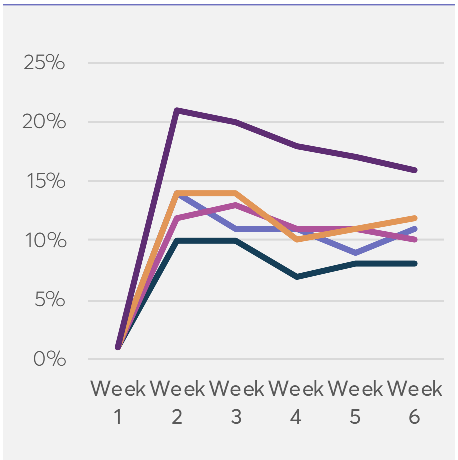
Video Games



Books



Magazines



Base for week 1: Total sample – see appendix for number of respondents

SECTION 4

Cultural consumption – In their own words

SECTION 4

Cultural consumption during the 6 weeks

IN THEIR OWN WORDS

In the final week (i.e. wave 6), respondents were asked to describe, in their own words, the extent to which the entertainment industries (e.g. music, film, TV, video games, books, social media) had helped them in dealing with changes to their lives and work since lockdown began. Respondents highlighted that entertainment industries had been instrumental in helping them to navigate the challenges presented by the COVID-19 pandemic and lockdown. Importantly, entertainment industries had provided something to do at a time when many were confined to their homes and looking to eliminate boredom, but in addition to this, entertainment had helped them maintain their mental health by providing a distraction, inspiration, an emotional outlet and a form of stress relief. Some also mentioned that activities such as reading, listening to music, podcasts and radio had helped them to feel motivated and enabled them to focus on self-improvement, rather than to feel weighed down by the difficult circumstances.

"TV and reading passes the time, as days when there is nothing to do are extremely boring."

FEMALE, 52

"Entertainment has helped me out a lot. It has helped to keep me occupied by giving me something to focus on and improve myself."

MALE, 24

"Entertainment content has been vital to my mental health."

MALE, 64

"Doing a daily fitness workout has given me a specific purpose or target to aim for and streaming music has helped to keep me motivated when running indoors on a treadmill."

FEMALE, 53

"Music has been important to me for my mental health and while exercising. I also enjoy movies - this has helped me zone out and just enjoy watching a good film."

FEMALE, 38

"I have a chronic health condition and am mostly housebound. Films, books, music and online content is vital for my ongoing mental health. Without this I would be in an unbearable situation."

MALE, 42

"I think TV and social media has helped with new ideas to keep people's spirits up, whether it be quizzes, live performances or just to show everyone is in the same boat and there for each other."

MALE, 40

"They have given me an escape from the anxiety and stress that the situation has provided when I've needed it."

FEMALE, 23

SECTION 4

Cultural consumption during the 6 weeks

ENTERTAINMENT AS A DISTRACTION

Having a distraction from difficult circumstances and negative news stories had also been important, and entertainment industries had played a key role in this by providing something else to focus on and facilitating escapism. For some, engaging with entertainment content simply gave them the opportunity to switch off and relax.

"They've taken my mind off what's going on in the world. Reading helps me relax, as does playing video games. They both send me to a different world for a short time."

FEMALE, 47

"I really enjoy reading to escape into another world generally, and it's especially helpful now if I can concentrate enough (not always possible)! TV is a constant background as I have it on most of the day... It helps to hear other voices."

MALE, 49

"I've been relying a lot on the radio, podcasts and audiobooks to pass the time while I look after my daughter. They've helped me focus on positive things, rather than getting bogged down in the reality of the situation."

MALE, 32

"All of the forms of entertainment I have been using throughout lockdown have helped me to escape from the world along with helping me forget what I can and can't do."

FEMALE, 23

SOCIAL MEDIA FACILITATING MUCH NEEDED CONNECTION

As, for many, face-to-face contact with loved ones was sparse during lockdown, social media was particularly valued for facilitating connections with family and friends digitally. Some also appreciated how social media helped them to stay up to date with the outside world. Video games were also mentioned by some as being helpful in maintaining connections, as they allowed them to play online with friends and focus on something fun and light-hearted.

SECTION 5

Appendix

SECTION 5

Detailed methodology

Number of waves: N=6

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

Sample:

- Nat Rep of UK 16+ population
- N=1000+ respondents to complete all 6 waves (i.e. with over recruitment in waves 1-5 to take account of attrition).
- Per wave = 1000+ (to ensure a minimum of N=1000 complete all 6 waves)

Fieldwork took place from the 9th of April to the 24th of May 2020.

Research respondents were sourced through AudienceNet's network of professionally managed, ESOMAR compliant, online UK consumer research panels. Respondents were paid an incentive for taking part in each survey.

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

While their historic behaviours had been tracked, each week respondents were asked afresh whether they had done any of the key actions/activities. This enabled us to capture new consumers (e.g. those who did not stream music in Wave 1 but took it up in later waves).

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

Week	1	2	3	4	5	6
Fieldwork Dates	9th – 19th April	20th – 26th April	27th Apr – 3rd May	4th – 10th May	11th – 17th May	18th – 24th May
Periods covered by survey	2nd – 12th April	13th – 19th April	20th–26th April	27th April – 3rd May	4th – 10th May	11th – 17th May
N=	3,863	2,792	2,369	2,132	1,947	1,074

SECTION 5

Interpreting the data

BASE SIZES:

- The base sample for each content category is those who consume them (i.e. not the total population).
- Where base sizes are below N=30, results must be interpreted with caution.
- As the weeks progressed and the base sizes became smaller, the statistical margin of error increased. This is especially noticeable for some categories.
- For most questions, the sample bases for each of the five content categories focus on those who buy physical products, download digital copies or stream/access them online. They exclude those who only consume via other means.
- Rounding: Where (single choice) question percentages do not add up to 100%, this is due to rounding of the data.
- For the share of access (by source) questions, any sources with 3% or below are grouped into "All other sources".
- Margin of error: With any piece of research, it is almost never feasible to measure the entire population and thus achieve results that are 100% accurate. We must, therefore, take into account the potential for error. As a guide, based on our sample size, we advise caution when interpreting results that have less than a (-/+) 3/4 % difference.
- When comparing changes between waves, it is largely those which are significant at a 95% confidence interval that are highlighted in the analysis. Smaller differences are highlighted in the analysis at times as these can often provide early indications of shifts.

ADDITIONAL OCI DATA:

Where relevant, data from the 2019 OCI study is included in this report to provide industry context. The main OCI study focuses on 3-month consumption as opposed to weekly. As such, in Wave 1 of this study, we also captured 3-month data to help contextualize the wave-on-wave results. Comparisons can be made between the 3-month data points captured in the 2019 OCI and in Wave 1 to some extent, however the weekly data cannot be compared in a like-for-like way due to the time-frame being very different.

Furthermore, some of the differences between the 2019 OCI and 3-month data points in Wave 1 are likely to be explained by updates to the questionnaire (e.g. new categories being included), which will be investigated in detail in the 2020 OCI report.

Where 3-month data is included in this report, guidance is provided in the analysis as to how to compare data points.

INFRINGEMENT FIGURES:

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

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

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

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

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

Digital Culture - Consumer Tracking Study

Thematic Report | JUNE 2020

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