

AUDIENCE NET



Intellectual
Property
Office

AUDIENCENET PRESENTATION AT PEC WORKSHOP

Prepared by AudienceNet | June 28th 2019



ABOUT AUDIENCENET

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

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.

OUR WORK IN THIS AREA

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 BPI, as well as major record labels (Universal, Warner and Sony) and platforms such as SoundCloud and Spotify.

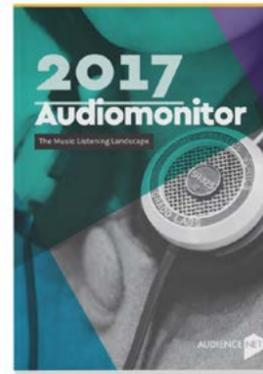
Our work covers a diverse range of topics, from tracking general consumption habits to giving clients insight into how to change behaviours. Importantly, a key area of focus is online infringement. AudienceNet currently holds extensive (global) data on the incidence of infringement behaviours, methods used and ways in which this could be reduced.

OUR WORK IN THIS AREA

Our music and entertainment clients include:



We also produce the following industry-specific research tools:



AUDIOMONITOR

Our market intelligence product Audiomonitor, a **bi-annual statistically representative measure of audio consumption** across all formats, platforms and devices, informs key decision-makers on trends in music consumption (domestically and abroad). As of 2018, Audiomonitor data has been cited and reported on by BBC News, Music Week, CMU, Forbes, Music Ally, and Digital Music News.



MUSIC BIZ CONSUMER INSIGHTS

An interactive portal delivering monthly music consumption data on the US market, to members of the Music Biz Association. As part of this, our industry specialists conduct **quarterly webinars** for members (major record labels, digital service providers, artist management and recording artists etc.), to contextualise and add detail to the key insights.

BACKGROUND AND OBJECTIVES

The IPO has been tracking consumer behaviour (among the 12+ population in the UK) in relation to online copyright infringement, since 2012.

The OCI has gathered eight waves of survey data.

The methodology has been through rigorous review processes.

The study focuses on six main content categories: music, film, TV programmes, books, video games and computer software.

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.



FINDINGS FROM THE IPO'S OCI STUDY ARE WIDELY DISSEMINATED AND HELP TO INFORM HIGH-LEVEL DECISION-MAKING

1.

Monitoring
infringement
behaviours

2.

Tracking the
effectiveness of
educational and behaviour
change campaigns

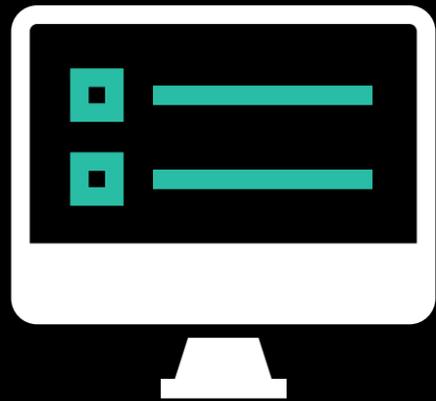
3.

Facilitating
evidence-based
policy making

4.

Providing
insight for content
industries and wider
stakeholders

RESEARCH APPROACH (NEW)



STAGE 1: ONLINE SURVEY

- Online Survey
- Quantitative and **Qualitative Questions**
- N=5,000
- UK +12 population
- Data Collection:
Online only (for cost and time-efficiency)
- Online sample via AudeinceNet's network of professionally managed (ESOMAR compliant), online UK consumer research panels

STAGE 2: ON-GOING QUALITATIVE ENGAGEMENT

- Online Community
- 5 days
- Mixture of research tasks, experimental conditions and discussion topics
- N=50
- Establishment of the ability to conduct longitudinal, behavioural, research and monitoring of distinct consumer groups over time.

DELIVERING ADDED VALUE

The IPO is seeking to appoint an agency that can robustly implement the existing OCI methodology, while also adding value via efficiency savings and additional insight.

AudienceNet promises to achieve these objectives through the following:



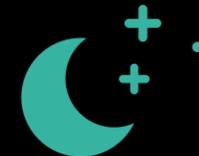
Providing robust measurement and in-depth insight

through the fusion of qualitative and quantitative methods



Providing a more tangible understanding of consumers

through the development of 'personas'



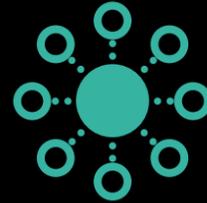
An iterative methodology

that allows further investigation at any point (via AudienceNet's 'Sleep Mode')

DELIVERING ADDED VALUE



Cost and time efficiencies
through online data collection



Optimizing the effectiveness
of future educational and behaviour
change campaigns:

Rigorously testing campaign
content before launch

Tailoring campaign content to meet the specific
needs of different consumer segments

Co-creation of campaign content to ensure that
the consumers' perspective is at the heart of it



AudienceNet's previous work
will provide benchmarking data,
additional context and learnings
to inform the research design

EARLY FINDINGS FROM STAGE 1



Infringement levels are high among **young groups** as well as **55+**



Investigating use of “**unknown sources**”, especially among **55+**



Key reasons for high incidence of **illegal downloading of film and music**



Key reasons for **illegally streaming sports**



Level of understanding that taking/using **screenshots can be illegal**



What **type of e-publications** are being accessed illegally (e.g. books, content from subscription newspapers/magazines etc.) and why



A high proportion (approx 30%) of those illegally accessing music/film/TV are open to taking up **subscription services**. What are the main factors currently preventing this?



Developing **effective communications materials** to reduce online copyright infringement

DEMOGRAPHIC/CLASSIFICATION VARIABLES

Internet use frequency

- Daily
- Weekly
- Monthly
- Low use

VPN use

- Any use
- Low use

Social class

- ABC
- C2DE

Employment status

- Employed full-time
- Employed part-time
- Unemployed and looking for work
- Unemployed and not looking for work
- Self employed

Age

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

Region of UK

- North East
- North West
- Yorkshire and The Humber
- East Midlands
- West Midlands
- East
- London
- South East
- East Midlands
- West Midlands
- Wales
- Scotland
- Northern Ireland

Ethnicity

- White
- Asian
- Black
- Other
- Mixed/Multiple

Online engagement

Tech Savvy

usually among the first of their friends to try new devices and mobile app AND people often ask their advice about new devices and mobile apps'

High Engagement with Online Content

spend a lot of time accessing content on the internet

PASSION VARIABLES

Respondents were asked about the below for each category (with the exception of 'digital visual images') on a four point scale (strongly agree = 1, agree a little = 2, disagree a little = 3, strongly disagree = 4)

My friends/family often ask me about _____

_____ is central to my life

I know more about _____ than most people I know

_____ is my favourite kind of entertainment

I actively search for new _____

I am always talking to other people about _____

Across each category it was scored on the following basis:

 High

 Medium

 Low

MUSIC

Downloading and streaming were asked about separately

GENERIC VARIABLES



Engagement

- Downloaded music
- Streamed or accessed music
- Shared music
- Purchased physical copies of music



Passion

Understanding

- Main reasons for accessing music
- Methods that would be used if illegal sources were no longer available

SPECIFIC BEHAVIOURS

Physical Purchases:

- Frequency of purchase (Most days, 2-3 times a week, About once a week, Every 2-3 weeks, About once a month, Less often)
- Number of purchases (over past week/month/three months)
- Type of purchase (albums/singles)

Downloading (over past three months):

- Frequency of downloading – high (Most days, 2-3 times a week, About once a week) and low (Every 2-3 weeks, About once a month, Less often)
- Number of tracks downloaded
- Sources used to download (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

Streaming (over past three months):

- Frequency of streaming– high (Most days, 2-3 times a week, About once a week) and low (Every 2-3 weeks, About once a month, Less often)
- Hours spent streaming
- Sources used to stream (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

Combined Downloading and Streaming:

Sources used over past three months (grouped into only legal, only illegal, mix of legal and illegal)

FILMS

Downloading and streaming were asked about separately

GENERIC VARIABLES



Engagement

- Downloaded films
- Streamed or accessed films
- Shared films
- Purchased physical copies of films



Passion



Understanding

- Main reasons for accessing films online
- Methods that would be used if illegal sources were no longer available

SPECIFIC BEHAVIOURS

Physical Purchases:

- Frequency of purchase (Most days, 2-3 times a week, About once a week, Every 2-3 weeks, About once a month, Less often)
- Number of purchases (over past week/month/three months)

Downloading (over past three months):

- Frequency of downloading – high (Most days, 2-3 times a week, About once a week) and low (Every 2-3 weeks, About once a month, Less often)
- Number of films downloaded
- Sources used to download (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

Streaming (over past three months):

- Frequency of streaming– high (Most days, 2-3 times a week, About once a week) and low (Every 2-3 weeks, About once a month, Less often)
- Hours spent streaming
- Sources used to stream (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

Combined Downloading and Streaming:

Sources used over past three months (grouped into only legal, only illegal, mix of legal and illegal)

TV PROGRAMMES/SERIES

Downloading and streaming were asked about separately

GENERIC VARIABLES



Engagement

- Downloaded TV programmes
- Streamed or accessed TV programmes
- Shared TV programmes
- Purchased physical copies of TV programmes



Passion



Understanding

- Main reasons for accessing TV programmes online
- Methods that would be used if illegal sources were no longer available

SPECIFIC BEHAVIOURS

Physical Purchases:

- Frequency of purchase (Most days, 2-3 times a week, About once a week, Every 2-3 weeks, About once a month, Less often)
- Number of purchases (over past week/month/three months)

Downloading (over past three months):

- Frequency of downloading – high (Most days, 2-3 times a week, About once a week) and low (Every 2-3 weeks, About once a month, Less often)
- Number of individual episodes downloaded
- Sources used to download (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

Streaming (over past three months):

- Frequency of streaming– high (Most days, 2-3 times a week, About once a week) and low (Every 2-3 weeks, About once a month, Less often)
- Hours spent streaming
- Sources used to stream (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

Combined Downloading and Streaming:

Sources used over past three months (grouped into only legal, only illegal, mix of legal and illegal)

LIVE SPORT

Only asked about streaming

GENERIC VARIABLES



Engagement

- Downloaded live sport events
- Streamed or accessed live sport events
- Shared live sport events



Passion



Understanding

- Main reasons for accessing live sport online
- Methods that would be used if illegal sources were no longer available

SPECIFIC BEHAVIOURS

Downloading/Streaming (over past three months):

- Frequency of downloading – high (Most days, 2-3 times a week, About once a week) and low (Every 2-3 weeks, About once a month, Less often)
- Number of sports events downloaded/streamed
- Sources used to download/stream (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

VIDEO GAMES

Downloading and streaming/access were asked about at the same time

GENERIC VARIABLES



Engagement

- Downloaded video games
- Streamed or accessed video games
- Shared video games
- Purchased physical copies of video games



Passion



Understanding

- Main reasons for accessing games online
- Methods that would be used if illegal sources were no longer available

SPECIFIC BEHAVIOURS

Physical Purchases (over past three months):

- Number purchased

Downloading/Streaming (over past three months):

- Frequency of downloading – high (Most days, 2-3 times a week, About once a week) and low (Every 2-3 weeks, About once a month, Less often)
- Number of video games downloaded/streamed
- Sources used to download/stream (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

SOFTWARE

Downloading and streaming/access were asked about at the same time

GENERIC VARIABLES



Engagement

- Downloaded computer software
- Streamed or accessed computer software
- Shared computer software
- Purchased physical copies of computer software



Passion



Understanding

- Main reasons for accessing software packages programmes online
- Methods that would be used if illegal sources were no longer available

SPECIFIC BEHAVIOURS

Physical Purchases (over past three months):

- Number purchased

Downloading/Streaming (over past three months):

- Frequency of downloading – high (Most days, 2-3 times a week, About once a week) and low (Every 2-3 weeks, About once a month, Less often)
- Number of software packages downloaded/streamed
- Sources used to download/stream (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

E-PUBLISHING (ELECTRONIC PUBLICATIONS)

Downloading and accessing were asked about at the same time

GENERIC VARIABLES



Engagement

- Downloaded E-publishing
- Streamed or accessed E-publishing
- Shared E-publishing
- Purchased physical copies of publishing



Passion



Understanding

- Main reasons for accessing e-publications online
- Methods that would be used if illegal sources were no longer available

SPECIFIC BEHAVIOURS

Downloading/Accessed (over past three months):

- Frequency of downloading/accessed – high (Most days, 2-3 times a week, About once a week) and low (Every 2-3 weeks, About once a month, Less often)
- Number of e-publications downloaded/streamed
- Sources used to download/stream (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

DIGITAL VISUAL IMAGES

Downloading and accessing were asked about at the same time

GENERIC VARIABLES



Engagement

- Downloaded digital visual images
- Streamed or accessed digital visual images
- Shared digital visual images

SPECIFIC BEHAVIOURS

Downloading/Accessed (over past three months):

- Sources used to download/stream (grouped into only legal, only illegal, mix of legal and illegal)
- Share of sources used (grouped into only legal, only illegal, mix of legal and illegal)

THANK YOU



If you have any
questions please get in touch:

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