Creative Industries Policy and Evidence Centre (PEC) Workshop – Investigating online cultural consumption using the Intellectual Property Office's OCI Tracker

Friday 28 June 2019, 11:00-13:00, Nesta
58 Victoria Embankment, Temple, London EC4Y 0DS

The PEC workshop *Investigating online cultural consumption using the Intellectual Property Office's OCI Tracker* brought together researchers from government, industry and academia to explore what further research insights can be gleaned from the OCI datasets. This document summarises the research themes and questions identified during the workshop.

We would like to stay in touch with researchers who want to use the OCI Tracker data for research. If you are interested to receive the spreadsheet offering harmonised data identifiers from wave 4 of the survey, or you want to explore research collaborations around the OCI Tracker data, please get in touch with Bartolomeo Meletti at bartolomeo.meletti@glasgow.ac.uk. You can keep up-to-date with PEC developments, including the launch of the OMeBa tool, by subscribing to our newsletter.

Workshop summary

Following presentations by Nesta, CREATe (University of Glasgow), UK IPO and AudienceNet, participants broke into three groups to reflect on what public bodies that own data like the OCI Tracker can do to make it more useful for researchers, and to identify research questions that can be investigated using the OCI data in particular. The three groups agreed that the OCI dataset is potentially valuable for insights beyond copyright infringement. The tracker survey approach was welcomed, enabling the identification of trends over time. There was general interest in matching the data to other datasets to provide a more timely and comprehensive measure of digital consumption which may otherwise not be available.

The IPO confirmed that the OCI Tracker data will continue to be made available to researchers as long as the IPO collects it and that it would look to match questions in future waves where possible to the unique identifiers table established by the PEC to maximise accessibility to the data by researchers.

There was general interest in exploring the impact of technological and product/service advancements on (online) consumption behaviours in relation to the content categories covered, as well as more specifically on the likelihood of using illegal sources to access them. The groups discussed whether the survey can be expanded to produce a richer understanding of the ways that people share content, e.g. sharing content via social media or content like film being shared as separate segments on YouTube. More specifically, the groups were interested to explore the following areas:

- Drivers of behavioural change.

- Price sensitivity. "Willingness to pay" variables would be of great interest to industry, but it appears difficult to collect meaningful data in surveys. Is it worth another pilot?
- Behaviour of 12-15 age group in the survey due to their lead adoption of innovations as well as the legal issues relating to the consumption patterns of this group.
- Specific devices used for consumption, and if/how these are shifting over time.
- Services and methods used to access content, and if/how these are shifting over time.

The groups were also interested in the new attitudinal/behavioural variables the IPO had added to the questionnaire this year, which provide insight into passion for content categories and opinion formers.

In terms of future waves of data collection, participants were keen to see the focus on technological and product/market advancements maintained, and ideally, built upon.

Research questions

The following questions were collected from the three group discussions:

- Can data be interpreted by a networked approach, identifying clusters of consumption behaviour, e.g. Fortnite and Netflix?
- What does free consumption mean? Can data speak to free services "paid" with loss of privacy / access to data? How about BBC licence fee?
- Sports consumption is collective. Can the data say anything about whether such a pattern exists?
- What are the levels of churn in digital platforms (across the spectrum of popularity, not just the most popular ones)?
- How does household structure affect media consumption?
- How are levels of platform use affected by the levels of personal data that is shared? This would presumably involve matching the survey to another dataset on levels of privacy.
- How does behaviour differ by the kind of place that is involved? For example, the comparison between urban and rural areas, recognising that the survey sample size is not large enough for it to be broken down to specific sub-regional geographies.
- Are there particular platforms that are of interest to older age groups in the light of the debate around the BBC licence fee?
- Can the data be used to inform debates around market concentration in competition cases?
- How can the data inform discussions about Public Sector Broadcasting (PSBs)?
- How do ease of access and ease of use affect consumption?

Other specific themes/areas that were mentioned include:

- Identification of variables and closer analysis of data that speak to social/cultural divisions, rural/urban, fast internet access, education, wealth.

- Health questions: amount of time spent online; exercise; going to concerts. What would linking these variables show? "Biggest competitor to Netflix is sleep."
- Behaviour by demographic. Family setting as a predictor of behaviour? E.g .Sky subscription (paid by parent) linked to other behavioural patterns. BBC was keen to dive deeper into frequency of consumption.
- The battle for consumers' loyalty given the number of (music and film) streaming platforms now available.
- Changes in the way video games can be accessed online, with new service providers soon to enter the market place.