# Illegal File-sharing Pilot Survey Report

Prepared for **Ofcom**

By **Kantar Media**

**Monday, May 24, 2010**

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# 1. Overview

## 1.1 The growth of illegal file-sharing

Since the birth of Napster in the late 90s, there has been a widely reported (though partially disputed) exponential growth in illegal file-sharing - the sharing of copyright protected digital media files (predominantly commercial music, movies and software) without permission. Despite a string of successful litigation cases against facilitating services such as Napster, as well as select individual offenders, decentralized peer-to-peer file sharing networks such as BitTorrent, Gnutella and eDonkey have continued to thrive amongst online communities.

The true impact on the core media industries is one that has been highly disputed. Whilst the majority of studies appear unanimous in the opinion that such activity is holistically damaging, there is also evidence that suggests file-sharing is an easy scapegoat for declines in sales, and in some respects can also be considered a promotional catalyst. Regardless of these debates, illicit file-sharing remains a hot topic that divides public opinion, and provides one of the key governmental targets pertaining to the Digital Britain act.

## 1.2 The role of Ofcom in monitoring Illegal file-sharing

Under the Digital Economy Act 2010, the remit of Ofcom has been extended to include a range of new duties related to online copyright infringement. As part of this work, Ofcom is required to assess the level of use of the internet to infringe copyright. In order to achieve this, Ofcom needs to develop a consistent and representative measurement system that is able to gauge the level of activity and attitudes towards illegal file-sharing in the UK over time.

## 1.3 The research brief

Given the importance of the subject and the significant investment required by Ofcom, it was undoubtedly paramount to determine the most appropriate and robust methodology for this purpose. Following a successful competitive tender, Kantar Media were commissioned by Ofcom to conduct a pilot survey, comparing online, telephone and face-to-face interviewing methods, with the primary objective of establishing the most effective and robust survey methodology to monitor illegal file-sharing among consumers.

In order to achieve the wider objective, specific criteria were set:

1. To compare the quantitative data from equivalent online, face-to-face and telephone surveys - to identify whether any significant differences exist.
2. To explore consumer understanding and interpretation of the questionnaire content.
3. To establish which methodology yields the most accurate response data.
4. To explore whether file-sharers are more or less likely to participate in any particular survey methodology, whether the profile of those participants vary, and whether there is a difference in the responses they give.

## 1.4 About this report

This report will attempt to detail the thought process, and procedure, relating to how we set out to address the research objectives. Ultimately, it will also hopefully provide all the necessary information from the pilot to enable Ofcom to assess the best way forward in terms of the wider tracking study.

In terms of reporting the results, it is split into two fundamental stages:

**Stage 1:** Testing the three core methodologies (CAPI face-to-face, CATI telephone, and CAWI online) alongside each other, covering both adults aged 16+ and children aged 12-15, and ultimately arriving at a conclusive recommended methodology.

**Stage 2:** Detailing the results of the selected methodology.

The angle of the analysis laid out in the report, for each of these stages, will be different: Stage 1 will primarily focus on the main differences between the various data sets, and present rationale for why they occurred. This will lead on to a logical conclusion for the make-up of the 'chosen methodology' for stage 2. This part will simply focus on the results of the study as though it had been designed in this way in the first place.

# 2. Key Considerations

Akin to the research objectives set out by Ofcom, this chapter sets out three key considerations that sat front of mind when designing all areas of the project – *representativeness*, *honesty of responses,* and *consumer understanding*.

## 2.1 Representativeness

Estimates on file-sharing in the UK have tended to differ substantially across the industry. For example, in 2009 a Harris Interactive study suggested that there were approximately 8.3 million music file sharers operating via peer to peer networks, whilst Jupiter Research estimated a total file-sharing figure of 7.3 million amongst 16-54 year olds. It is perhaps useful to note that these studies were both conducted solely online; our own research 'FuturePROOF', which covered a nationally representative audience, using a combination of online and offline methodologies, suggested a figure closer to 6.3 million (12.3% of the UK 16+ population).

Many of the differences that have been observed may be attributable to a number of factors, but it is logical that the sample make-up and differences in weighting and grossing is one of these, as it can lead to very different universe projections. Therefore, it has been essential to scrutinise this aspect of the research in order to achieve what we believe to be sufficiently representative figures. Although the methodologies assessed for this study were predominantly undertaken using Omnibus approaches, which are all nationally representative on the surface, there are specific intricacies with the three traditional data-collection methods that mean some sections of the population are perhaps not represented as well as they could be:

**CAPI Face-to-Face** – Technically this is the only methodology of the three that is considered to give all sections of the population an equal chance of being interviewed. Despite the employment of quotas and post weighting, to ensure as representative results as possible, our experience is that it can slightly over-represent older and more down-market sections of the population, due to the difficulties in reaching groups that tend to spend more time outside of the home (particularly during traditional interviewing hours); this problem can be prohibitively expensive to address. In direct relation to this project, face-to-face interviewing tends to generate a higher proportion of low frequency internet users than other methods and hence those least likely to download and share files.

**CATI Telephone** – This methodology naturally excludes those who do not have a landline telephone, which is an ever-increasing section of the population. Although traditionally it has also had a tendency to over-represent older and more down-market sections of the population, this is generally easier and cheaper to address than via a CAPI methodology.

**CAWI Online** – Online interviewing naturally excludes those without internet access, and even amongst those who do have internet access it tends to skew towards high frequency users. This clearly has relevance to this subject as it automatically increases the likelihood of picking up the core audience of interest. It is also important to note that this methodology (specifically using an Omnibus approach) excludes 65+ year olds due to the under-representation amongst online panellists. Although using an ad-hoc approach would be possible, attempting to reach this audience via a method that is largely unsuitable would clearly not provide a true representation of this group anyway.

## 2.2 Honesty of responses

The fundamental drawback with any questionnaire centric approach is that we are reliant on what people tell us they do. The only way that we can get truly accurate behavioural data is via passive means – i.e. some form of metering. This wasn't an option for this study (or for the eventual tracker), partly for cost reasons, but also because of sample bias: it is highly unlikely that anyone actively partaking in illegal file-sharing would agree to have their PC metered.

Naturally, the legal aspect of this study could hinder market research in its quest to seek the truth with regards to accurate measurement, and valuable insight into the subject matter. Nevertheless, part of the challenge of this research study was to ensure we extrapolated accurate information through questioning respondents in a way that minimised suspicion, and conveyed a level of trust that reassured respondent there would be no repercussions from any admission. This primarily relates to the administration of the survey and the questionnaire design, although conversion to meaningful analysis also had to be front of mind. In essence, the best way to maximise honesty was to create an environment and a questionnaire structure that ensured the respondents were comfortable with answering the questions and could see the logic or point of the survey.

One of the more obvious ways to facilitate this was to allow respondents to self-complete the questionnaire where possible. Clearly in many cases, the presence and input of an interviewer can be beneficial, particularly when the respondent is unsure of terminology, or the true purpose of the question. However, it also carries with it the increased of conditioning, where the respondent tells the interviewer what they think they ought to hear. This phenomenon is known as *Social Desirability Bias;* the respondent is aware that their behaviour is considered antisocial by other people and

under-report or completely deny to the interviewer that they carry it out.[1] This is relevant to file-sharing in general which carries connotations with it, and even more so when gauging illicit behaviour that effectively incriminates the respondent.

In relation to the three core methodologies on test, online interviewing is a self-completion methodology by its very nature and so doesn't carry the issue of conditioning. Conversely, it is not feasible to self-complete via a telephone methodology. With face-to-face interviewing it is possible to administer at least some of the questions self-completion, and as such we opted to incorporate this into the testing procedure. This is explained in section 3.1.1.

Of course, when all is said and done, what constitutes an 'honest' response is purely subjective, but even so it was important to make this judgement at the very least. In order to gain a more direct opinion of honesty we asked interviewers to make a judgement for us by filling in feedback forms directly after an interview. This is discussed later on, along with some statistical techniques we adopted to evaluate honesty based on the actual data.

## 2.3 Consumer understanding

Customarily, any study that covers a technical subject matter, and a wide range of ages, will place a lot of importance on the questionnaire design stage, and on conducting the interviews themselves. In terms of age, it is perhaps slightly unusual with this particular survey, that the younger ages were anticipated to be the ones most likely to have a grasp of the subject matter and the technicalities involved. Nevertheless, it was essential that the ability to create a wide understanding was considered during the setup process. Our response to this is covered in more detail in section 3.1.2 (Questionnaire design), as well as throughout section 3.2 (the core results).

[1] **References:**

Sudman and Bradburn, 1982. *Asking Questions: A practical guide to questionnaire design,* Jossey-Bass, San Francisco

Nancarrow, Brace and Wright, 2000. *Tell me lies, tell me sweet little lies; dealing with socially desirable responses,* The Marketing Review, 2 (1)

# 3. Stage 1: Testing the methodologies

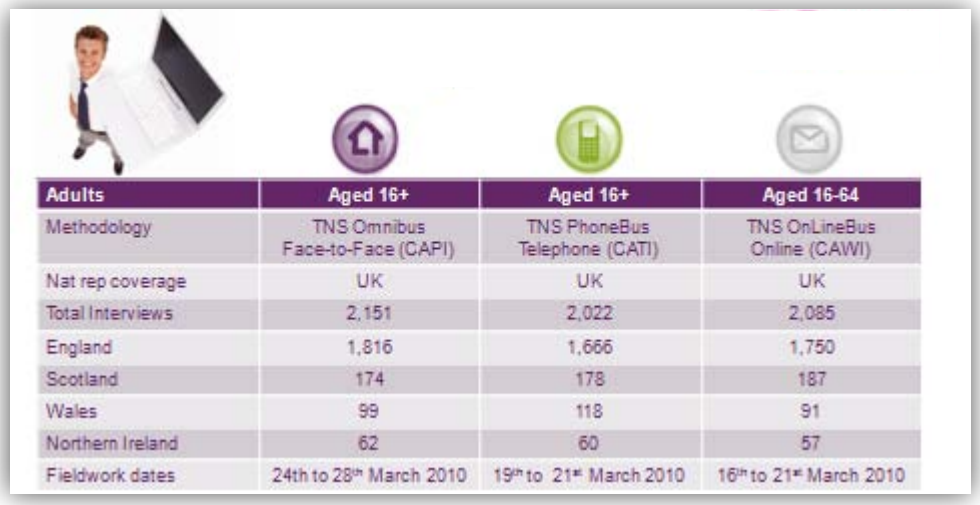
## 3.1 Survey design

### 3.1.1 The Methodologies tested

This sub-section is chiefly focused on the basic survey design and the rationale considered. Further technical details of the methodologies that were tested are available in section 5.

***The Adults' Surveys***

The chart below summarises the methodology make-up for the adults' surveys, with sample sizes broken down by country, along with the dates when fieldwork took place:



| Adults | Aged 16+ | Aged 16+ | Aged 16-64 |
|---|---|---|---|
| Methodology | TNS Omnibus Face-to-Face (CAPI) | TNS PhoneBus Telephone (CATI) | TNS OnLineBus Online (CAWI) |
| Nat rep coverage | UK | UK | UK |
| Total Interviews | 2,151 | 2,022 | 2,085 |
| England | 1,816 | 1,666 | 1,750 |
| Scotland | 174 | 178 | 187 |
| Wales | 99 | 118 | 91 |
| Northern Ireland | 62 | 60 | 57 |
| Fieldwork dates | 24th to 28th March 2010 | 19th to 21st March 2010 | 16th to 21st March 2010 |

*Rationale behind a holistic Omnibus approach*

It is worth stressing that there were several reasons why we deemed an Omnibus approach as most suitable for the adults' surveys:

- All three are tried and tested, nationally representative methodologies, respected as such within the industry.
- They can be turned around much quicker than an ad-hoc approach, due to their ongoing nature (they run every week of the year) and the consistent systems that are set in place. The ability to turn the research around within a tight timescale was a key objective of the pilot study, primarily to avoid data being affected by publicity around the Digital Economy Bill.
- It would allow consistency in terms of internal personnel and resources, specifically important for fieldwork liaison, co-ordination and analysis.
- The size of the proposed questionnaire was suitable for an Omnibus study, averaging around 5 minutes in length. Although it is possible to include a lengthy questionnaire on an Omnibus, the

costing structure i.e. pay-per-question, means it can be less cost effective than ad-hoc. In this case it was much more cost-effective than an ad-hoc approach.

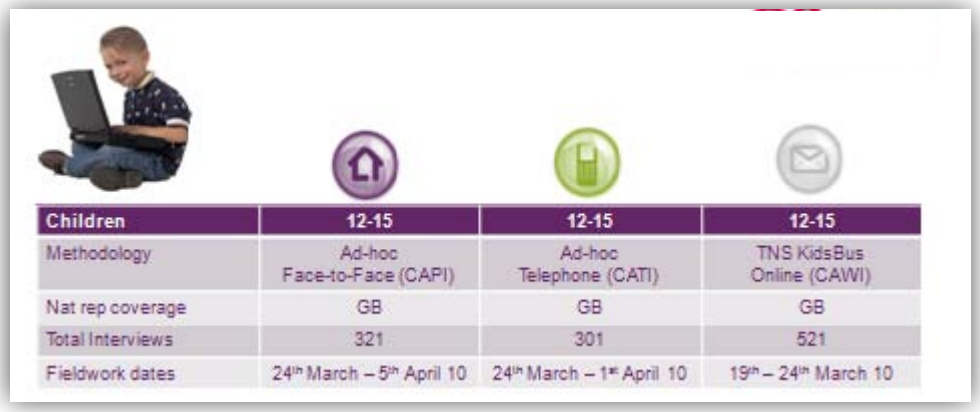
- The fact that illegal file-sharing would be one topic amongst others (since an Omnibus includes varied client topics) could minimise suspicion of our motives.

*CAPI part self-completion v fully interviewer administered*

In order to test the potential effect of interviewer conditioning, we opted to split the adult CAPI face-to-face into two, with 50% of the sample self-completing the questions on downloading. This group of respondents were passed the machine by the interviewer with instructions on how to complete the survey themselves, with supervision. Some of the differences that were observed in this respect are discussed throughout. However, for the purpose of the core results they are grouped together as 'CAPI'. The rationale for this is two-fold; firstly there are only a few observed significant differences between the two sets of data at an aggregate level, and secondly it allows consistent comparison across similar sample sizes (c2,000 for each).

***The Children's Surveys***

The following chart summarises the methodologies, with the dates when fieldwork took place:



| Children | 12-15 | 12-15 | 12-15 |
|---|---|---|---|
| Methodology | Ad-hoc Face-to-Face (CAPI) | Ad-hoc Telephone (CATI) | TNS KidsBus Online (CAWI) |
| Nat rep coverage | GB | GB | GB |
| Total Interviews | 321 | 301 | 521 |
| Fieldwork dates | 24th March – 5th April 10 | 24th March – 1st April 10 | 19th – 24th March 10 |

*Rationale between a mixed ad-hoc and Omnibus approach*

Whereas the adults' surveys all afforded the consistency of a fully Omnibus approach, this was not possible for reaching 12-15 year olds. A face-to-face CAPI Kids omnibus option was provided within the proposal for this element, but the time required for fieldwork was restrictive: 5 weeks to achieve 300 interviews with 12-15 year olds. This was primarily a function of the fact that only around 9% of households have a child in this category, and this study is performed on the back of the adult omnibus over a number of waves. In order to fulfil the timing requirements it was thus necessary to set up an ad-hoc study using a nationally representative sample frame.

We were not able to offer an in-house omnibus option for interviewing children via the telephone. Therefore, as with the face-to-face, we opted to set up an ad-hoc CATI study to achieve the desired boost of 300 12-15 year olds.

For the online element we were able to utilise the online Kids Omnibus. This covers children aged 8 to 15, and is generally considered an effective way to reach children of such ages, primarily because online is a familiar method to the high majority of children and they tend to be more comfortable answering questions in this manner. Generally, this type of survey yields c500 aged 12-15 and it was decided that we would not place a restriction on this (using the desired target of 300 interviews). The reason for this was that any reduction in sample size would have resulted in a distorted sample profile, and the differences in sample size compared to the CAPI and CATI cells would statistically not affect the results in most cases.

*Rationale for the exclusion of Northern Irish 12-15 year olds*

Since the sample of 12-15 year olds was a boost, and thus much lower than that of 16+ year olds it was decided that it would be prudent to cover Great Britain only (rather than the wider UK) for this element. Although we could have technically included Northern Ireland within the parameters, it would have made the exercise more expensive (particularly for the face-to-face element), for little gain: UK representative proportion of interviews for this group would have yielded only a handful of Northern Irish respondents; too small to be considered meaningful in analysis.

### 3.1.2 The Questionnaire

A draft questionnaire was provided by Ofcom during the tender process. Some initial observations were raised by Kantar Media, and a questionnaire development meeting took place prior to the survey. This collaborative approach was important to ensure that all stakeholders were happy with the content, the tone, and the translation to all three methodologies (CAPI, CATI and CAWI) and all age groups (12+). The full questionnaire can be found in the Technical Appendix, but to summarise the topics that were asked:

- Standard classification demographics (Age, Sex, Working Status, SEG, Household makeup)
- Mobile Phone ownership
- Internet access locations and frequency of usage
- Awareness of activities that can be performed through the internet (including downloading and sharing media files)
- Specific multimedia file downloading and sharing activity – Ever, Last 3 months
- Services used to download and share files in the last 3 months
- Quantity of specific types of files downloaded in the last 4 weeks
- Awareness that specific types of files can be illegal to download
- Attitude (agreement) statements on downloading
- Proportion of file types paid for in the past 3 months
- Proportion of file types obtained legally in the past 3 months

It was concluded that the questionnaire should not be specially adapted for the 12-15 sample (as it often would be), as it was felt the vast majority would, in fact, be more knowledgeable than certain sections of the adults' sample. It would also have obvious consistency benefits during analysis. Of course this did mean that the language had to be taken into consideration within the questionnaire design, to suit the needs of all ages.

Further comments on the questionnaire design are incorporated alongside the results in section 0.

### 3.1.3 Analysis & Weighting

The results of the pilot survey were made available to Ofcom in the form of electronic tabulations, and an SPSS database. In order to facilitate the most direct comparison possible for each data set, the CATI and CAWI methodologies were weighted to the sample profiles of the CAPI Face-to-Face Omnibus in terms of region, age, sex, and social grade.

## 3.2 The results of the adults' surveys

This part of the report describes the comparative aggregated results of the adults' (16+) surveys, across each of the three methodologies. At this point in the project, the actual findings carried lower importance than the differences across the methodologies, thus the latter forms the primary focus here.

### 3.2.1 Key methodological variables

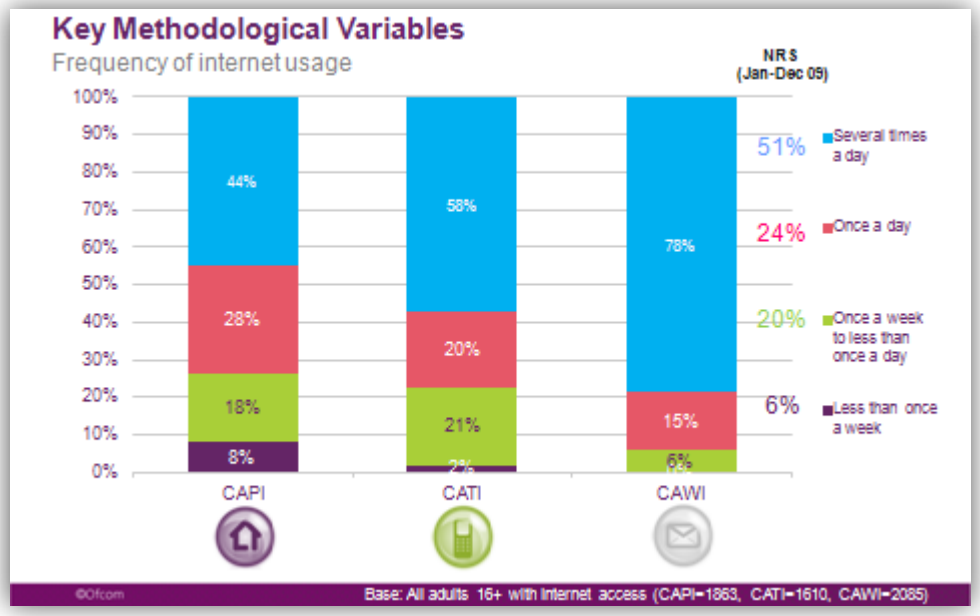
The following two areas are imperative in terms of the sample make-up, and relate back to specific methodologies. Much of this pertains to the points discussed in section 2.1 about representativeness, and key exclusions from the methodologies.

***1) Internet access – location and frequency***

As to be expected, all CAWI respondents had access to the internet in one way or another, with 98% able to access it from home (the most relevant form of access to this study). The CAPI and CATI samples more closely reflected what we know to be true for the general population in the UK, with figures of 76% (74% at home) and 74% (72% at home) respectively.

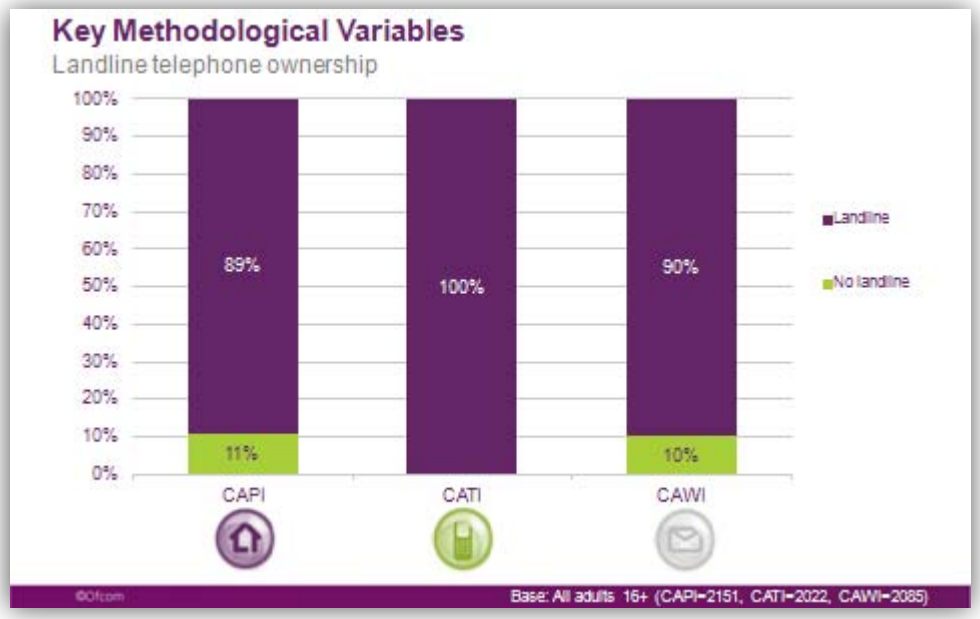
Respondents who claimed to be able to access the internet were asked how often they personally did so. This shows a distinct pattern across the three methodologies with the majority of the CAWI sample being relatively heavy users (93% at least once a day), and the CAPI sample being at the lower end of the spectrum (72%); CATI was in the middle of the two with 78%.

Note that the latest published NRS figures (Jan-Jun 09), as displayed on the right hand side of the chart below, sit somewhere in between the CAPI and CATI figures.



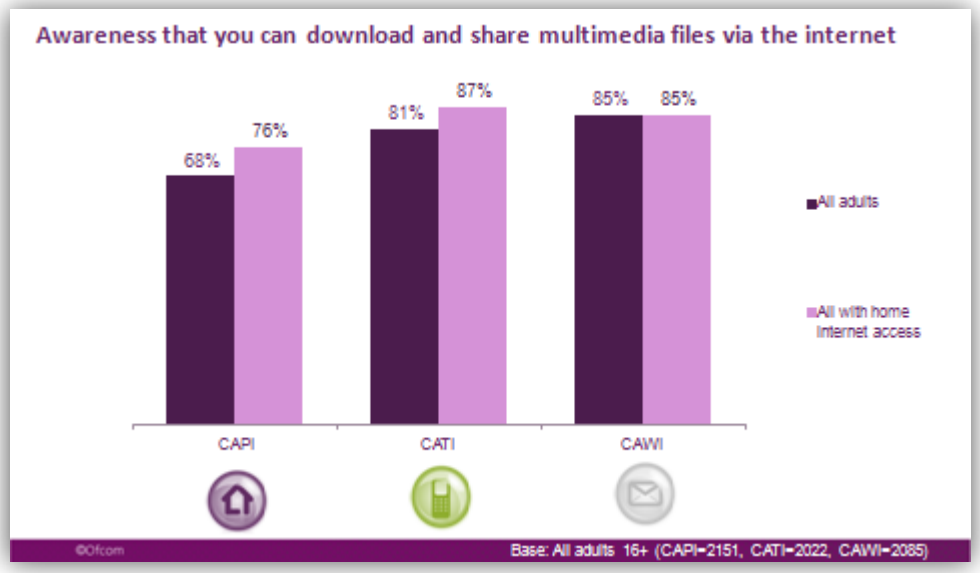
**2) Landline telephone ownership**

In a similar vein to internet access, it is logical that the CATI respondents all had access to a landline telephone in their household. The figures for CAWI and CAPI were similar in this respect, with 1 in 10 having no landline phone in their home.

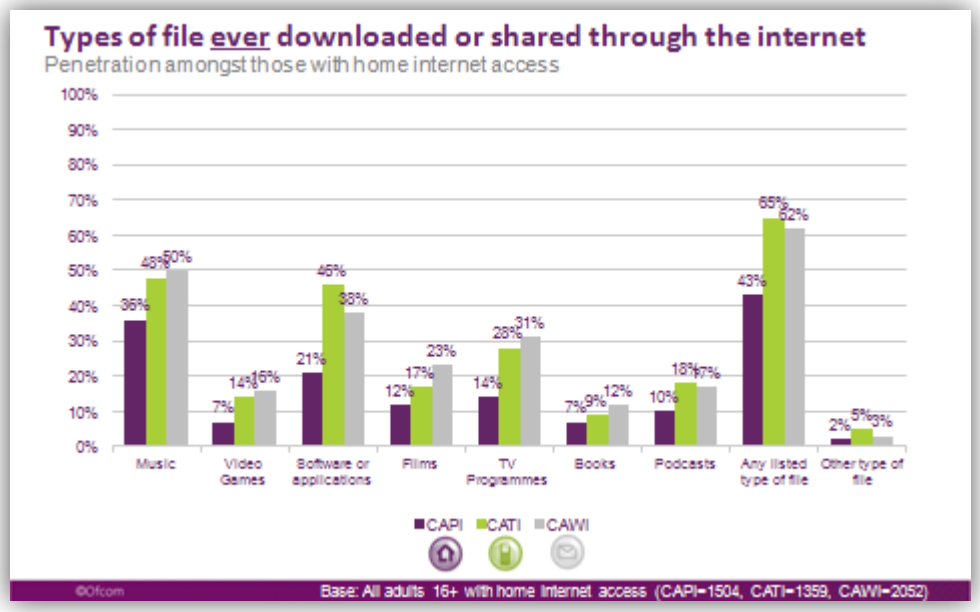



### 3.2.2 General file sharing – awareness and activity

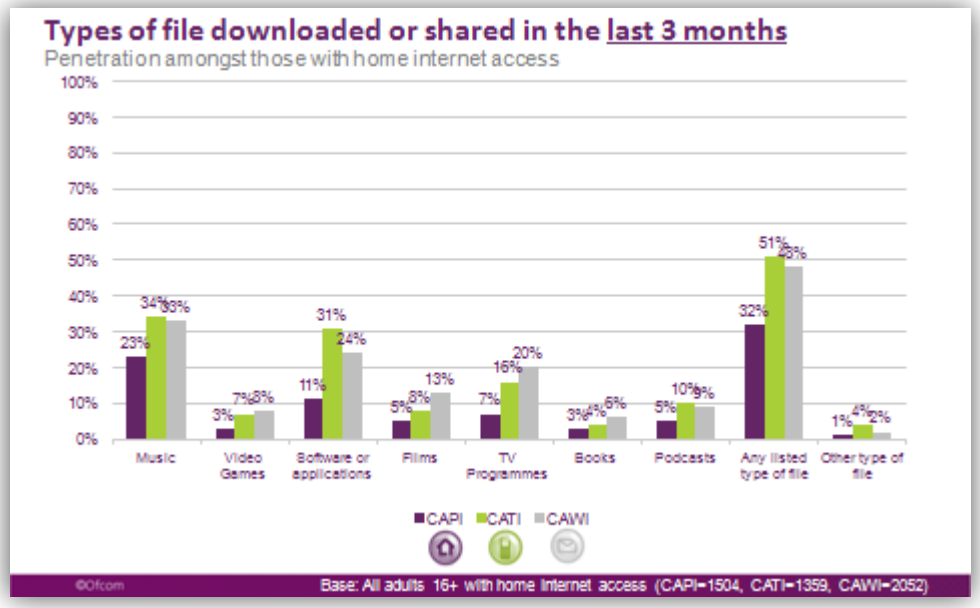
In order to eliminate any subject bias i.e. revealing the topic of interest, awareness of multimedia file-sharing was asked alongside a number of other internet activities such as making telephone calls and reading the news online. Naturally, the penetration on CAPI and CATI was lower amongst all adults, since those without internet access formed part of the sample. This can be corrected by filtering on those with internet access: Awareness of file-sharing amongst the home internet population was still lower on CAPI (76%) than both CATI (87%) and CAWI (85%).



Respondents who were aware of file-sharing were then asked (from a pre-coded list) which types of multimedia files they had ever downloaded. Similar to awareness, when filtering the data on home internet access, the penetration levels of downloading types of multimedia files were consistently higher on CATI and CAWI than they were on CAPI. Penetration of 'any listed type of file' was 65% on CATI, compared to 62% on CAWI and 43% on CAPI. The higher incidence on CATI was primarily due to software/application file-sharing, with almost half of those with home internet access claiming to have downloaded or shared this type of file. Across all three methodologies, music had the highest incidence – 50% on CAWI, compared to 48% on CATI and 36% on CAPI.




A similar pattern was observed when looking at a more recent period, and generally a high percentage of those who had ever downloaded or shared, also claimed to have done so in the last 3 months. On both CAWI and CATI, a third claimed to have downloaded music (23% on CAPI).

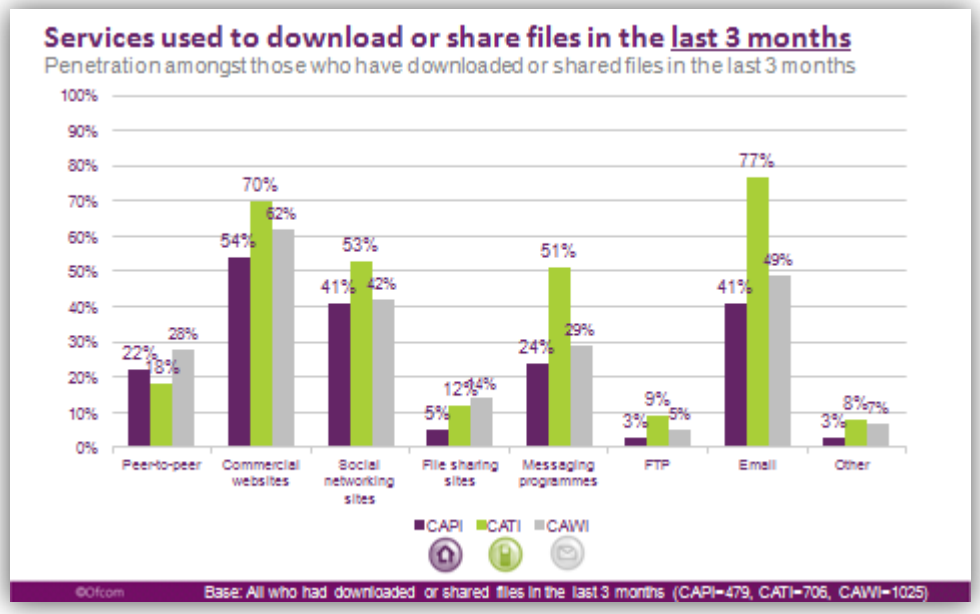


Discussions took place at the questionnaire design stage between Kantar Media and Ofcom regarding the best way to gauge the usage of various online services that facilitate file-sharing. It was decided that asking a long list of websites or software applications would be unfeasible from both a respondent and analysis perspective due to the sheer number and variety, so as an alternative they were grouped into logical and respondent friendly categories, with popular examples included. The rationale here is that those who used the services would most likely be aware of the descriptions:

1. Peer-to-peer such as Bit Torrent, Gnutella, eDonkey, Limewire and Ares
2. Commercial websites such as iTunes, Blinkbox, Amazon, Lovefilm, Movieflix, Napster, Play, or Spotify
3. Social Networking sites such as Facebook, Myspace, or Bebo
4. File sharing websites such as Rapidshare, Yousendit, or Easyshare
5. Messaging programs such as Windows Messenger or Skype
6. FTP
7. Email
8. Other (please specify)

CATI produced higher penetration levels for the use of services most commonly associated with legal file-sharing - *commercial websites* (70%), *messaging programmes* (51%) and *e-mail* (77%). Conversely, CAWI had the highest incidences for methods associated with illegal activity - *Peer-to-peer* (28%) and *File-sharing websites* (14%). Interestingly, peer-to-peer was the only category in which the face-to-face CAPI sample scored higher than telephone, possibly suggesting reluctance on the latter to admit to using what is predominantly a channel for illicit sharing.

Curiously, this question got a significant number of refusals on CAWI (10%). However, this is most likely due to the fact that they were visibly allowed to refuse on the self-completion questionnaire. On the two interviewer administered questionnaires they were not prompted with a refusal code; instead the interviewer would only code as a refusal if it was initiated by the respondent. The fact is that on CAPI and CATI, the refusals were most likely disguised within the 'None of these' code. This is supported by the results – 69% on CAPI and 62% on CATI, compared to 43% on CAWI.

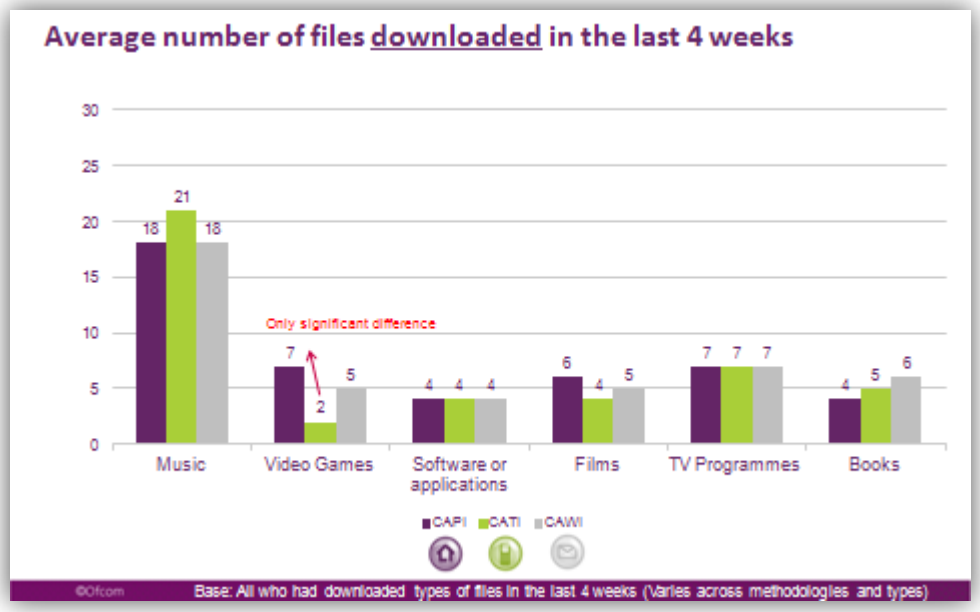


Respondents who claimed to have downloaded or shared specific types of files in the last 3 months were asked about the quantity they had downloaded in the previous 4 weeks. It was agreed that this was a sufficiently short time period for respondent to recall; anything further back than this might have risked distortion. One of the other difficulties of asking this type of question is the fact that files come in a variety of file formats. For example, a user may download a single track from a commercial website, or a zipped up album via a peer-to-peer network. Nevertheless, our aim was to give simple instructions to respondents in order to facilitate the closest estimation possible. The criteria were as follows:

- *Music* – Number of music tracks, counting an album as the equivalent of 10 songs.
- *Video Games* – Number of video games, excluding patches and upgrades.
- *Software or applications* – Number of software products or applications, excluding patches and upgrades.
- *TV Programmes* – Number of TV programmes, excluding the use of iPlayer, ITV Player, Sky Online, or 4OD.
- *Films* – Number of films.
- *Books* – Number of books.

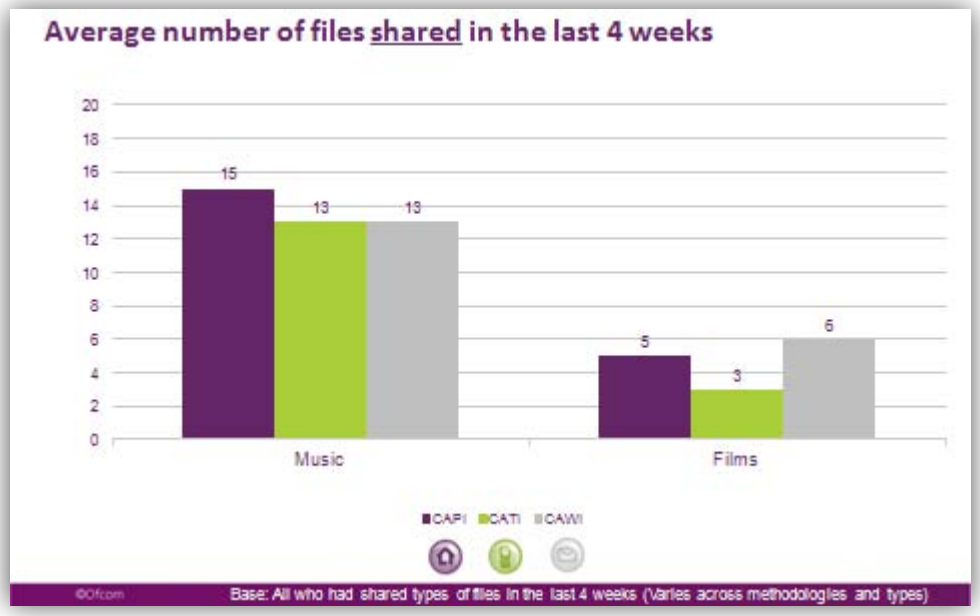
In the first instance we asked the respondent to estimate the exact number of files. This was then coded into sensible bands for analysis e.g. 1 to 5. If the respondent claimed they didn't know the figure, they were prompted with the bands with which to estimate. Thus, in order to be coded as 'don't know', they had to say this at both stages.

In terms of the number of files downloaded in the last 4 weeks, there were no significant differences in the averages across the methodologies, except for video games on CATI, which had a mean figure of 2 (compared to 7 on CAPI and 5 on CAWI). Music had the highest mean figure with 18 on both CAPI and CAWI, and 21 on CATI.



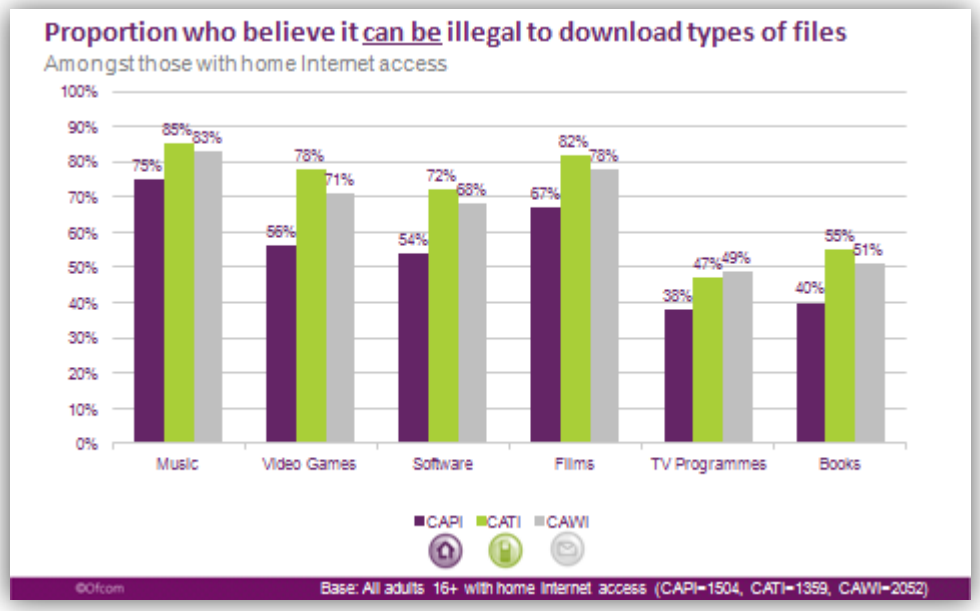
We also asked respondents to estimate the number of music tracks and films they had shared. Again there were no significant differences in the mean quantities given on all three methodologies, and these figures are shown in the following chart.

Although on all methodologies there were people who responded to the questions for both downloading and sharing, there were also a significant number who gave an answer of "None" and so were excluded from the mean calculations. Therefore, the mean calculations are based only on those people who gave a positive response to each question. For example on CAWI, of the 260 people who answered the questions about films, 31% had not downloaded in the last 4 weeks whereas 62% had not shared: The 38% who had shared produced a higher average (6) than the 69% of people who had downloaded (5).




### 3.2.3 Awareness of illegal file-sharing

It was a conscious decision not to bring up any mention of illegality for any of the preceding questions; this would no doubt have influenced the responses given. Therefore, this specific point in the questionnaire was considered the logical place for the questions about awareness of illegality for each of the types of files, where general file-sharing activity had already been gauged. As displayed in the following chart, awareness amongst those with internet access was significantly lower on CAPI than the other two methodologies, which were relatively even across the board. The differences between CATI and CAWI were only significant for Video Games (78:71).



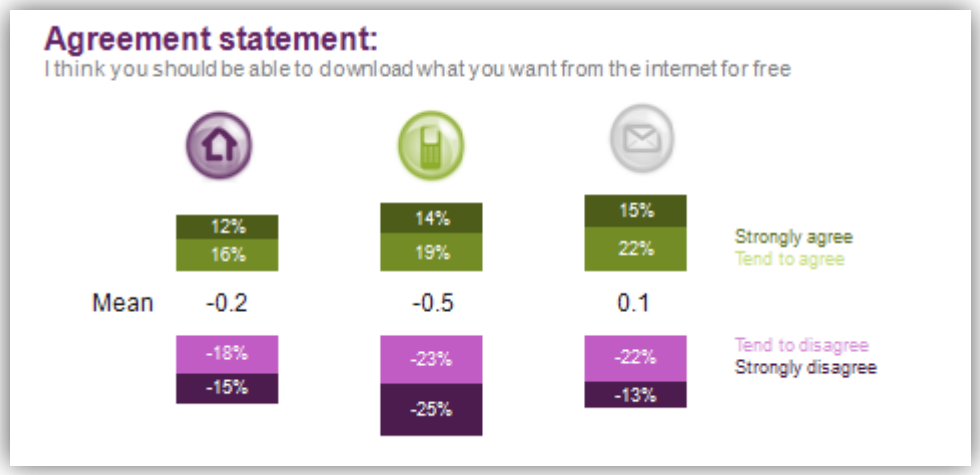

### 3.2.4 Attitudes to file-sharing

As well as actual behaviour, it was also vital to measure attitudes of the general public on the subject of file-sharing. After all, it is fundamental changes in collective attitude that can steer future behaviour. For this purpose, four questions were posed to all respondents, regardless of internet access or knowledge of file-sharing. For each of the questions, respondents were asked to specify agreement levels using a scale ranging from strongly disagree to strongly agree. Mean figures were then calculated as follows: *Strongly agree*=4, *Slightly agree*=2, *Neither/Nor*=0, *Slightly disagree*=-2, *Strongly disagree*=-4. *Don't Know* and *Refused* were excluded altogether from the mean calculations.

Each statement is discussed in turn:

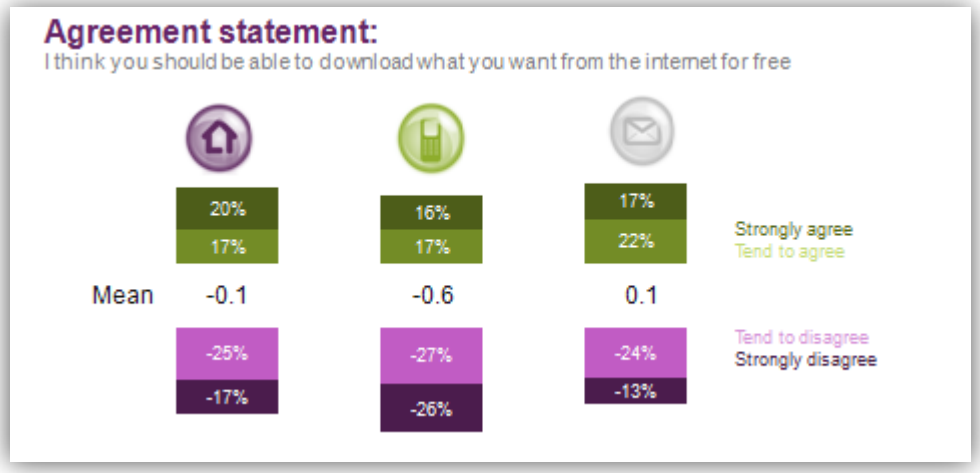
***a) I think that you should be able to download what you want from the internet for free***

Amongst all adults, CAWI was the only one with a positive mean score overall (0.1), although opinion was very much split down the middle; 37% at least slightly agreed, compared to 35% who at least slightly disagreed. In comparison, CATI showed the strongest disagreement (48%), despite CAPI showing the lowest agreement (28%).



Since both the CAPI and CATI samples contained people without internet access, and thus a higher proportion who had never downloaded files, it made sense to investigate whether the differences on this question were primarily down to this sample make up; after all the 'Don't Know' figures were logically higher amongst this group of people – 20% on CAPI, 8% on CATI, and 3% on CAWI (Not shown on chart). In order to do this, the most logical step was to focus on those who had actually downloaded or shared files in the last 3 months, and were therefore more likely to have an opinion.

As is evident from the chart below, the mean scores displayed little change when taking non-downloaders out of the equation, mainly because 'Don't Know' had purposefully been excluded from the calculations. However, despite there being further convergence between CAWI and CAPI in terms of positive agreement, a divergence in terms of disagreement was also observed i.e. the disagreement percentages on CAPI became stronger. This, along with the high disagreement on CATI, suggested that there may have been some conditioning effects on the interviewer administered methodologies.




So to test this theory of conditioning, it was useful to look at the CAPI interviews where this question was self-completed alongside those that were administered by an interviewer, as well as the CAWI responses.

The results were as follows:

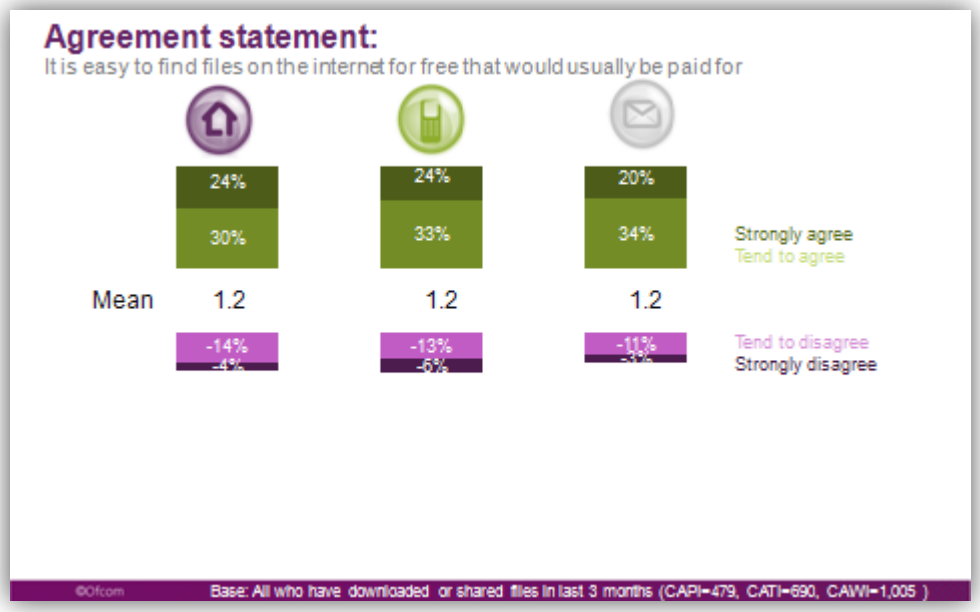
| *Base: All who had downloaded or shared files in the last 3 months* | ***239*** | ***240*** | ***1,005*** |
|---|---|---|---|
| | CAPI interviewer administered | CAPI self-completion | CAWI (self-completion) |
| **Total Agree** | 34% | 35% | 38% |
| **Total Disagree** | 46% | 40% | 38% |
| **Mean** | -0.3 | -0.1 | 0.1 |

It is evident from the table that there was little difference between self-completed and interviewer administered CAPI, in terms of positive agreement to the statement. However, there does appear to have been a significant difference in the negative, where both CAPI self-completion (40%) and CAWI (38%) scored similar results. This either accentuates the theory of possible conditioning on the fully interviewer administered CAPI, or it shows that the presence of the interviewer might make people think harder about moral issues, and lead to more considered responses.

For the remaining three statements that were asked, there is little point in viewing the data based on all adults, as they fundamentally rely on knowledge of file-sharing, and would clearly be skewed by the differences in sample make-up (particularly internet access). Thus this data is best viewed based on those who downloaded or shared files in the last 3 months…

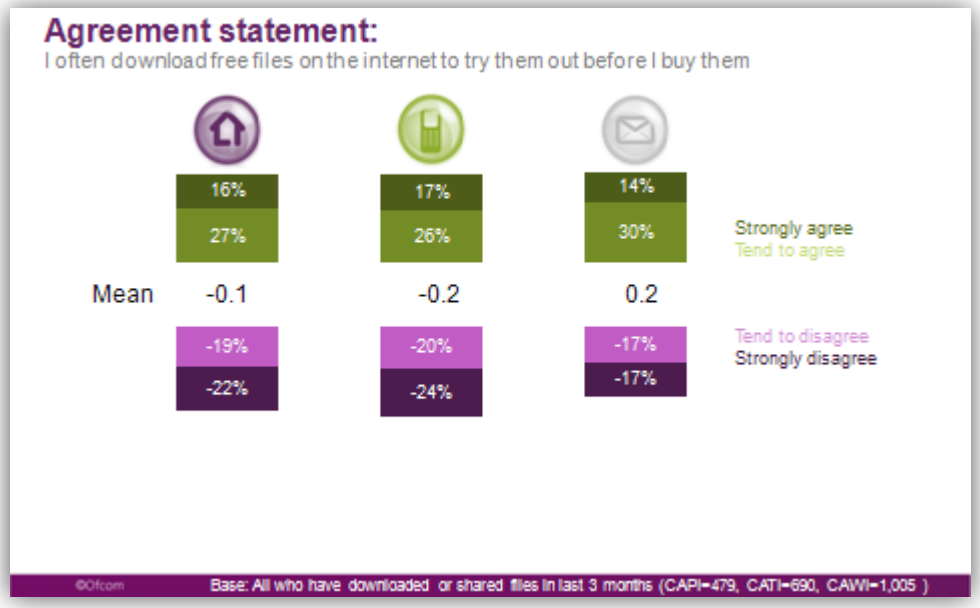
***b) It is easy to find files on the internet for free that would usually be paid for***

The general consensus across all three methodologies was that it is easy to find files on the internet that would usually be paid for, demonstrated by an identical mean score across the board (1.2). This suggests that file-sharers on all three methodologies had a relatively equal knowledge of accessibility. It also suggests that they were equally as happy to comment on this area, without inferring they had themselves done any wrongdoing.



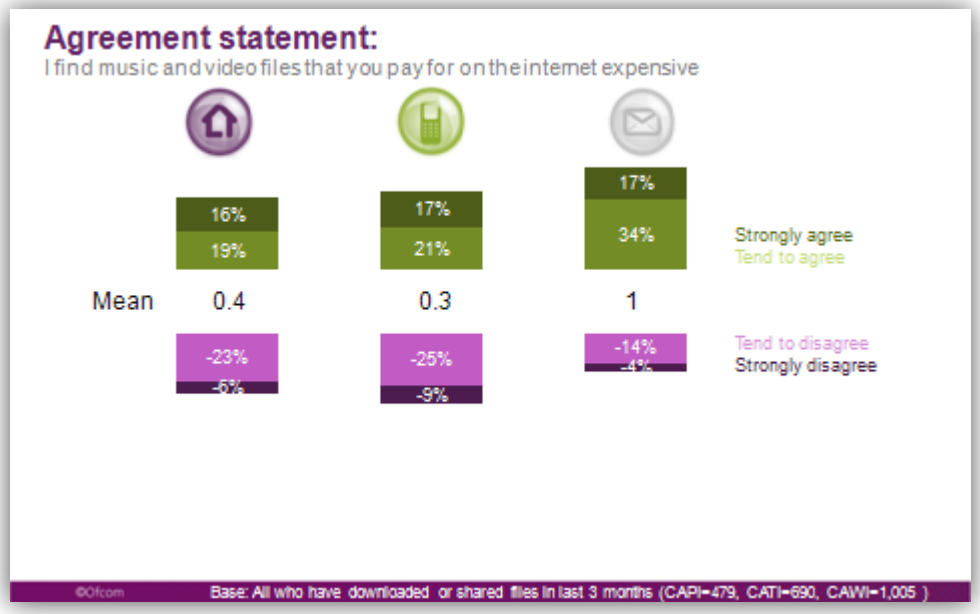
***c) I often download free files on the internet to try them out before I buy them***

Again, the results for this statement were relatively consistent across methodologies in terms of positive agreement (43% on both CAPI and CATI, and 44% on CAWI). However, disagreement levels were more spread (31%, 44% and 34% respectively). The upshot of this was that CAWI was the only one with a positive mean score – 0.2.




***d) I find music and video files that you pay for on the internet expensive***

Although the mean scores for all three methodologies were positive for this statement, CAWI respondents had much higher agreement overall on finding paid for files expensive; a mean score of 1. This was mainly due to light agreement rather than strong, which was actually the same across the board (17%). However, a third of all CAWI respondents slightly agreed, compared to a fifth on both CAPI and CATI.



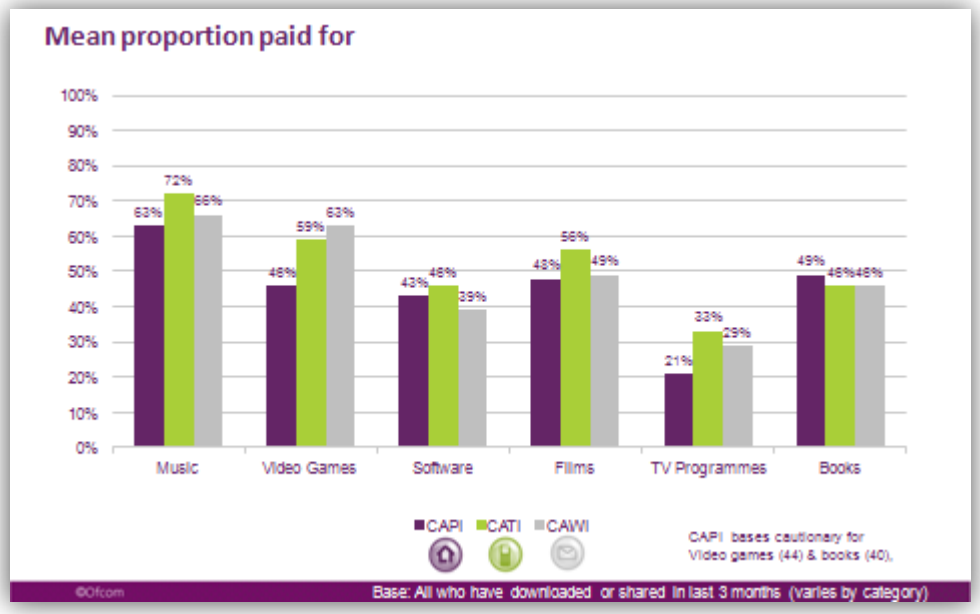
### 3.2.5 'Paid' versus 'Free' downloading

Although there is clearly some correlation between 'free' and 'illegal' it wouldn't be fair to infer the two operate in tandem. After all, there is an abundance of free and perfectly legal content within all the categories. Therefore, it was important to measure claimed levels of both.

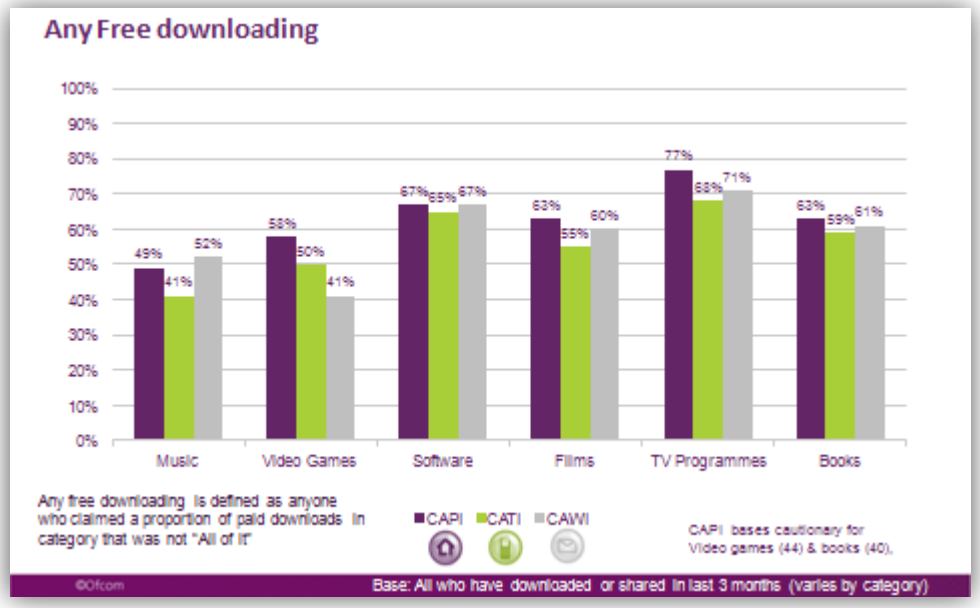
For each category downloaded in the last 3 months, respondents were asked, using pre-codes, the approximate proportion they had paid for. For simplicity of analysis the chart that follows shows the mean proportion paid for across the categories. The means were calculated as followed:

- All of it = 100
- Over three quarters = 87.5
- Between half and three quarters = 62.5
- Between a quarter and a half = 37.5
- Less than a quarter = 12.5
- None = 0

It is evident from the chart that CATI respondents were generally the most likely to claim a high proportion of paid for downloads - it was the case for music, software, films and TV programmes. In fact for music, the most popular category, 73% claimed that over three quarters were paid for (not displayed on the chart). This was significantly higher than both CAPI (61%) and CAWI (63%).



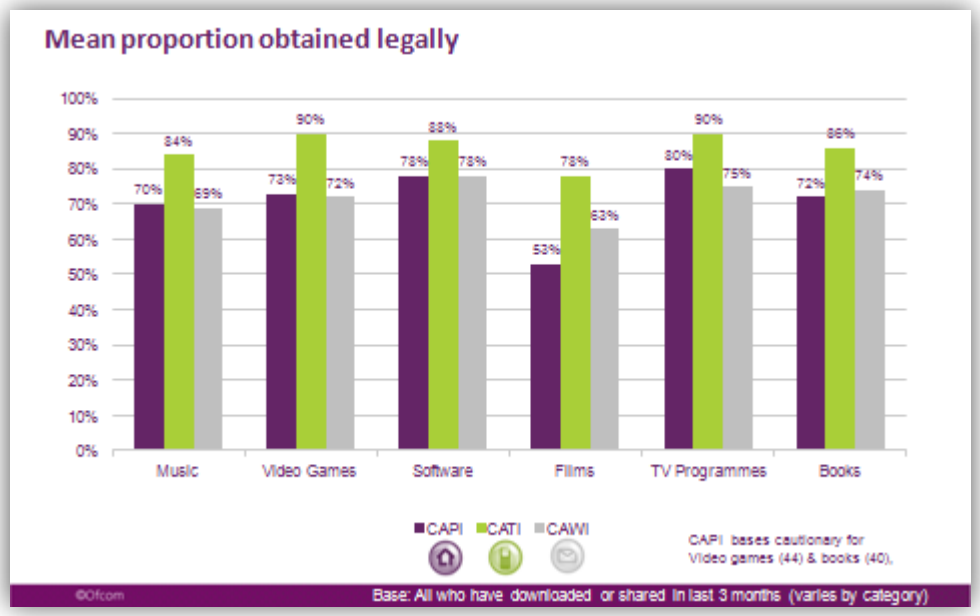

Switching it around, it is also possible to gauge the levels of 'free downloading' by calculating the number of people who claimed a proportion of paid downloads that wasn't 'all of it' within each category. Similar to the observations on paid proportions, CATI generally had the lowest incidence of any admission to free downloading. Again using music as an example, 41% claimed any free downloading as opposed to 49% on CAPI and 52% on CAWI. Generally, the levels of claimed free downloading were similar on CAPI and CATI across the board. That said, video games bucked this trend with CAWI having the lowest incidence at 41% (50% on CATI and 58% on CAPI).




### 3.2.6 'Legal' versus 'Illegal' downloading

The final question asked the proportion that had been obtained legally. This was clearly the one that relied on respondent honesty more than any of the others, since no inferences to illicit behaviour could be pinned before this point. Some deliberating took place on the questionnaire wording, and it was decided that the best way would be to specifically ask about the positive form - 'legal,' and derive the 'illegal' incidences based on this. In general, it was left up to the respondent to ascertain what they considered legal, and the approximate proportion it accounts for.

Looking at the data in a similar fashion to the previous question, it became apparent that CATI was the odd one out, with a much higher claim of downloading legally. CAWI and CAPI were remarkably close in most cases, although it is worth mentioning that the base sizes for CAPI were much lower than CAWI due to lower incidence of file-sharers in general within the sample. Two of these, Video Games (44) and Books (40), should be treated as cautionary on CAPI for this reason.

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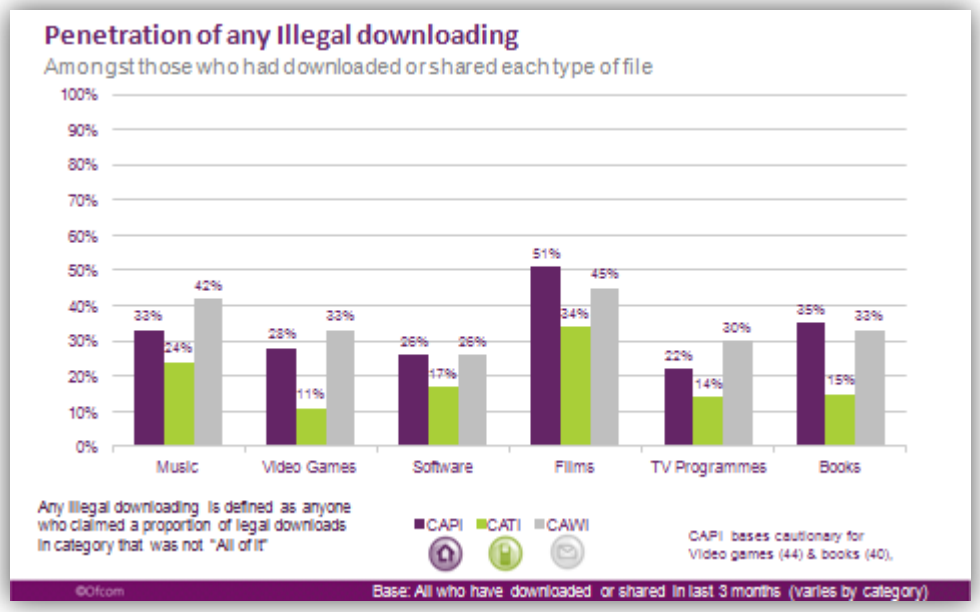
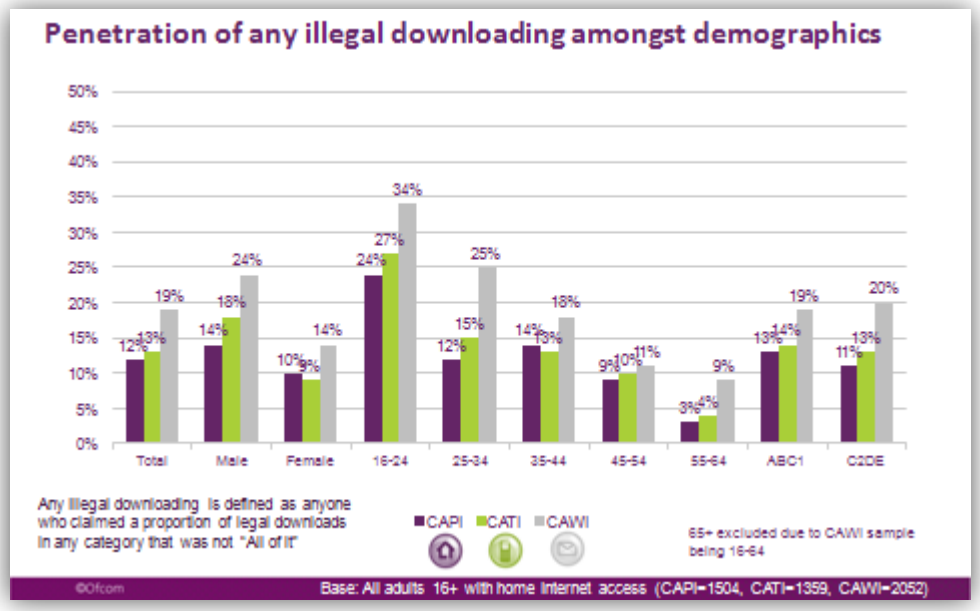
As mentioned, the data can be viewed by the reverse of the question by calculating incidence of 'any illegal downloading' within categories, based on the number of people who claimed a proportion of paid downloads that was not 'all of it' within each category. Both charts highlight a curious effect that was observed on CATI - whereas questions about general file-sharing yielded the highest results across most categories, the introduction of illegality to the subject matter suddenly reversed this trend and admission became much lower than on the other two methods. Our interpretation of this is an increased reluctance to discuss illegal practice with a remote interviewer. Although CAPI had the same issue of interviewer input, it appeared that the conditioning effect was not as prominent; in effect they were able to offer reassurance to the respondents in person.




In order to provide an overall universe incidence figure for illegal downloading in the last 3 months, it was possible to create a net across the categories based on the above. Despite the observations made about CATI admission, the incidence actually remained virtually the same as CAPI (13%, compared to 12%) when viewing the results amongst all those with home internet access. This was primarily due to the fact that overall downloading levels were much higher at the start for CATI, meaning that a larger number of respondents went on to be asked questions about illegality. CAWI, on the other hand, remained consistent with results previously encountered in this sense, resulting in a higher illegal-downloading total of 19%.

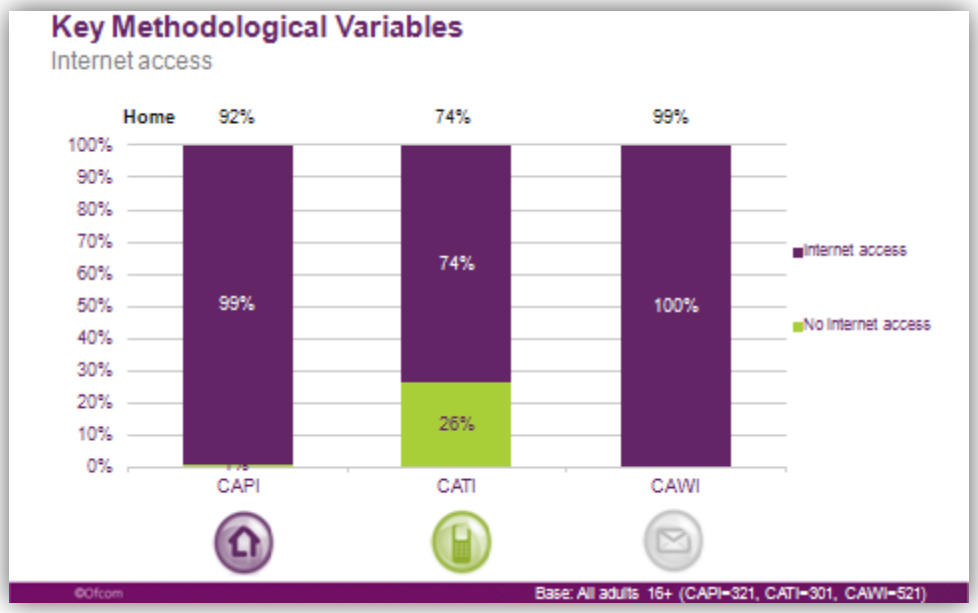
The following chart displays the penetrations that were observed across the main demographic groups – Sex, Age, and Social Grade. It is evident that CAWI showed higher penetrations of illegal downloading across all demographic groups, particularly amongst the younger age groups; 16-24s had the highest penetration with a third of those with internet access having admitted to some form of illegal downloading. In comparison, both CAPI and CATI displayed around a quarter amongst this age group.



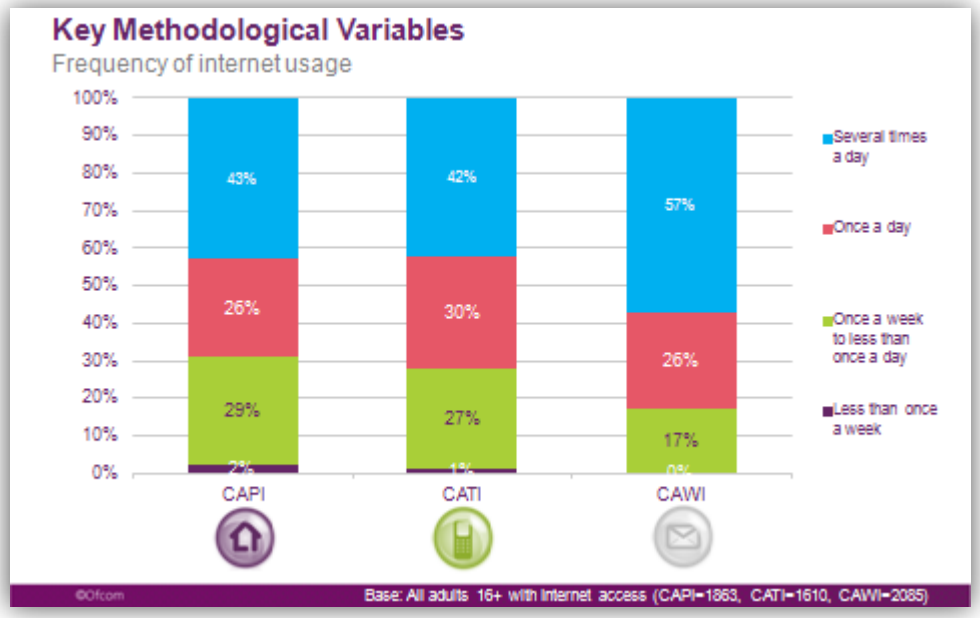
## 3.3 The results of the children's surveys

This part of the report describes the main findings from the children's (12-15) surveys. It is not reported in as much depth as the adult survey, chiefly because it covers a smaller section of the population, but it must be stressed that it is still an important one given that file-sharing is so embedded in the culture of this age group.

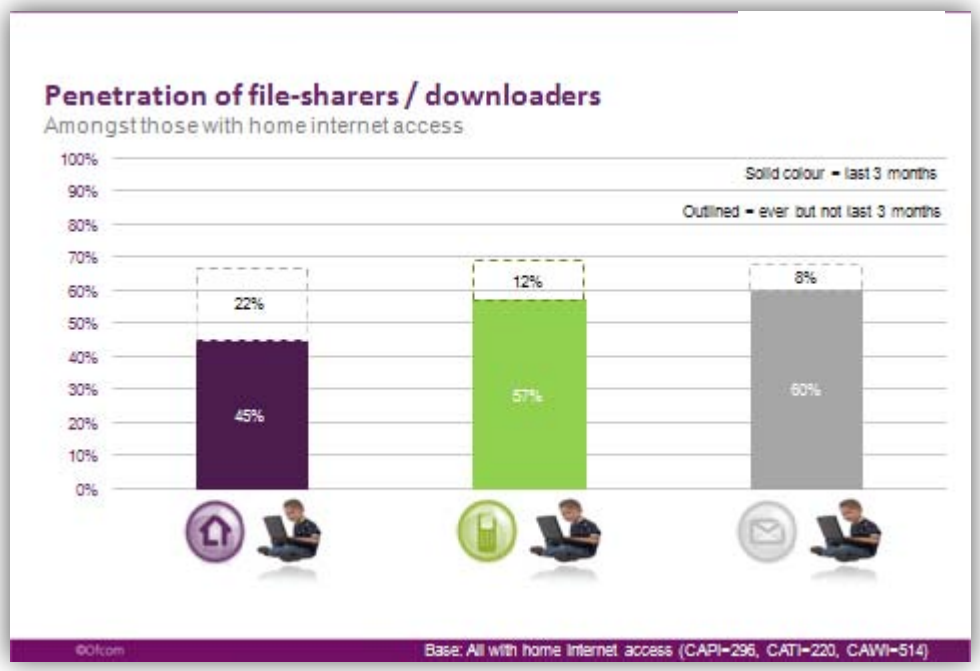
As with the adult surveys, it was again imperative to ascertain the differences in internet access and frequency, since this was a clear driver of differences in the adults' results. Amongst this age group, the internet access variable actually uncovered a flaw in CATI from the outset: On all three methodologies we were obliged to gain parental consent, and to briefly summarise the subject matter, including a prompt that it would touch on the subject of illegality. This appeared to prompt under-claim of internet access via the telephone, with a quarter of the sample claiming not to have it. We believe that this was a genuine attempt to avoid further questions about downloading. This opinion is also supported by the fact that we continued to ask about downloading regardless of internet access, and the high majority (82%) of those who said they didn't have internet access then went on to say they had downloaded (including illegally – 30%).



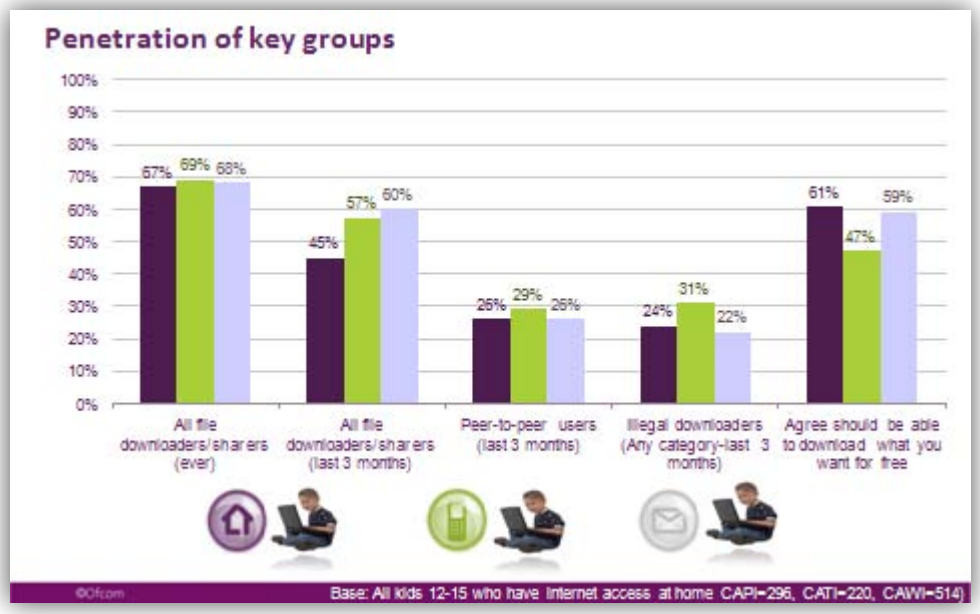

In terms of frequency of access CAPI and CATI figures were very close, with 69% using the internet every day on the former, and 72% on the latter: This compared to 83% on CAWI. Although this was a similar pattern that was observed in the adult data, it was not as pronounced. These figures are displayed on the chart on the following page:




Despite frequency of access being higher on CAWI, this didn't appear to affect the overall universe of file-sharers, which remained consistent across all three methodologies (67% on CAPI, 69% on CATI and 68% on CAWI). However, CAPI had a higher proportion of children who said that they had ever downloaded or shared files, but had not done so in the last 3 months (a third). Logically, this could be put down to the fact that the CAPI sample were lower frequency internet users than CAWI, but then this trend was not observed on CATI. In fact, the CATI figures were much closer to CAWI in this respect, where 83% had done so in the last 3 months compared to 88%.



The following chart summarises incidence levels for some of the key groups for 12-15 year olds. Despite CAPI having a significantly lower incidence of file-sharers in the last 3 months than the other two methodologies, it retained similar incidences to CAWI for peer-to-peer usage, illegal downloading, and agreement that you should be able to download what you want from the internet. This is very different from the trend that was observed amongst adults. It is also noticeable that CATI, as with adults, was the most inconsistent methodology; as well as the initial flaw pointed out earlier, the % of those who agreed that you should be able to download what you want from the internet for free belied the fact that the incidence of legal and illegal downloading was generally high amongst this group of people, particularly the latter which was the highest observed at 31%.




The key groups covered above give a good overall view of the children's results, but there were numerous other observations made. Some of the differences can be logically assigned to a methodological or sample reason, but there are also number where inferences were not possible. Again, CATI was particularly erratic in the main.

Key findings are laid out by question as follows:

***Q4. Services used to download or share files in the last 3 months***

- CAPI produced significantly lower results for the use of commercial websites (44%) than CAWI (63%), and CATI (76%)
- CATI produced much higher figures amongst 12-15 year olds for the use of the three main online communication methods (figures are amongst file-sharers – last 3 months):
    - *Social networking sites* – 77% CATI, compared to 54% CAPI and 58% CAWI.
    - *Messaging programmes* - 77% CATI, compared to 40% on CAPI and 34% on CAWI
    - *Email* - 73% CATI, compared to 32% on CAPI and 40% on CAWI.

The relative closeness of these figures gained from CATI suggests a high degree of flat-lining i.e. respondents continuously claiming 'Yes' through a prompted list of answers. The responses on the other two methodologies appeared to be more considered.

***Q6. Types of files believe it can be illegal to download***

- CAWI (78%) had higher awareness that music could be illegal to download than both CAPI (63%), and less so CATI (71%).
- This was not translated to other types of files which was generally higher on CATI. For example TV Programmes was 52% on CATI, compared to 30% on CAPI and 37% on CAWI.
- That said, 28% of those interviewed on CAWI were aware that all types of file could be illegal, higher than CATI (23%) and even more so, CAPI (11%).

***Q7. Agreement statements:***

***a) I think you should be able to download what you want from the internet for free***

- Agreement levels across all aged 12-15 were similar for CAPI and CAWI; the former had a mean agreement score of 1.3 compared to 1.4 on the latter. CATI differed in this respect, with a score of 0.6.

**b)** ***It is easier to find files on the internet for free that you would usually buy***

- Amongst downloaders, agreement on this statement was much higher on CAPI than both CATI and CAWI; the mean scores were 2.1, 1 and 1.1 respectively

**c)** ***I often download free files on the internet to try them before I buy them***

- The number who strongly agreed was very consistent across all three methodologies, around 14% on each. However, a higher proportion of CAWI respondents held a neutral view than the others with 27% claiming to neither agree nor disagree (this compared to 15% on CAPI and 20% on CATI).

***d) I find music and video files that you pay for on the internet expensive***

- Although agreement levels were relatively consistent across the three methodologies for this statement, a higher proportion of CAPI respondents strongly agreed (38%). This compared to 23% on CATI and 24% on CAWI.

***Q8. Proportion of files types that were paid for in the last 3 months***

- A much higher proportion of respondents on CAPI (59%), claimed to pay for 'none' of their music files, compared to CATI (34%) and CAWI (19%). This was reflected in the three mean scores – 25%, 46%, and 42%.
- The base sizes were generally too low on CATI, and even more so CAPI, across the other categories to be considered robust enough for analysis.

***Q9. Proportion of files types that were obtained legally in the last 3 months***

- Contrary to the fact that CAPI had a much higher proportion of admission to free music downloading than the other two, this did not translate to admission to illegality. In this case, the 'None' figure was fairly even; 15% on CAPI, 20% on CATI, and 14% on CAWI.
- Again the base sizes were restrictive on CATI and CAPI for the other categories.

## 3.4 Interviewer feedback

In order to gain some qualitative insight into the research process, we tasked both CAPI and CATI interviewers to fill in feedback sheets directly after each assignment. Of course, this element covers only interviews that were fully interviewer administered; the CAWI and CAPI interviews that contained a self-completion element were thus excluded.

As well as allowing the interviewers to add in their own open-ended comments, we posed the following questions to them:

1. Did you think the respondents were being truthful?
2. Did you think they felt comfortable answering the questions?
3. Did the respondents understand all the questions or was there any confusion?
4. Were there any questions that were harder to answer than others or caused people to think more?
5. Is there anything else you would like to comment on about this link and the way it was answered or asked?

In addition to this, the CATI interviews were also recorded, and a number were listened back.

The findings are summarised as follows:

***CAPI (fully interviewer administered) interviews***

- The majority of face-to-face interviewers felt respondents answered truthfully, were comfortable with the questions and were generally receptive to the research.
- Naturally, those who admitted to downloading illegally, were considered to be open and honest in their answers. However, there were a significant number of cases where it was felt respondents were not being totally truthful with the answers and hesitated before giving an answer. This was predominantly during the questions covering illegality, although in some cases it was perceived that they stated 'no' to earlier questions in order to avoid being asked further questions (not knowing what these might be).
- There were occasions noted when respondents might have been hesitant to answer questions on illegal downloading due to the knowledge that their name and address details were going to be taken.
- There were also a couple of incidences where it was clear that respondents were aware of the recent publicity on the subject. In both cases, the interviewers had a sense that this might have influenced their answers.
- A number of elderly respondents were unsure of some of the terminology that was being used as they rarely or never use the internet. It was, however, perceived unlikely that they participated in the relevant activities anyway.

***CATI interviews***

- Similar to CAPI, it was felt that most respondents were generally open about downloading/sharing files if they did it, and also forthcoming regarding the extent of their activity. However, unlike CAPI it was much more difficult to tell where a lie took place as it relied on the remote interviewer picking out hesitations or patterns in speech, rather than any visible signs.
- A small amount of respondents were clearly hesitant in their voices when asked about the amount they downloaded/shared legally. In cases where they did admit to doing it, particularly when indicated they used peer-to-peer networks, it was suspected that they had over-estimated their percentage of paid-for and legal files.
- Some respondents didn't think several types of downloading were illegal, but they were mostly infrequent users with very little knowledge on the subject.
- Again, a number of elderly respondents struggled to get to grips with the terminology, though they were unlikely to be file-sharers anyway.

These observations appear to be consistent with, and help to support the data comparisons discussed in the previous section.

## 3.5 Statistical analyses

Kantar Media undertook additional analyses to further understand the differences between the methodologies.

### 3.5.1 Data modelling: Sample versus data collection

Although it is possible to see the direction in which a demographic variable influences estimates, it is not possible to isolate demographic influences without looking at the respondent level data. Moreover, at an overall level, it is not possible to quantify the impact of any single variable on an estimate, as demographic measures often work together or against one another. The aim of this analysis was to identify these relationships that are hidden when analysing the aggregate level data.

As we have already seen, the core set of demographic variables associated with file-sharing/downloading behaviour were gender, age, social grade and frequency of accessing the internet. The analysis then posed the following question: *"How do methodologies differ if these demographic variables are removed?"* That is, how did the mode of data collection influence respondents' answers?

***In other words, this analysis separates the answers received through a particular methodology from the sample which a methodology delivers.***

The analysis revealed the following associations between data collection and responses:

- Affirmative responses (e.g. Yes, I have downloaded…) to illegal activities were lower when an interviewer was present.
- Affirmative responses to interviewer assisted CAPI were generally lower than self-completion CAPI.
- Generally, affirmative responses to downloading activities were much higher through CATI interviewing. This pattern was not as strong during questioning on illegal activities.
- CAWI arrived closer to the aggregate average than the other methodologies. This is not to say that CAWI responses definitely represented the true population estimate but rather once demographic measures are controlled for, CAWI held the relative middle ground[2].
- Self-completion CAPI appeared to have the most consistency compared to the other methodologies, albeit at a lower level than CATI and CAWI.

[2] Across most of the questions, CATI was associated with higher scores and CAPI with lower scores.

### 3.5.2 Missing Value Analysis: Refusals

Missing Value Analysis identifies patterns in how people answer survey questions. Additional insights were gleaned by comparing the prevalence of similar patterns across methodologies.

The analysis compared refusals amongst the four attitude statements. Refusals to the attitude statements were deemed to be a fair indicator of respondent engagement during the latter portion of the questionnaire. Here, interviewer assisted CAPI collected the most refused answers, whereas the CAWI respondents were more forthcoming:

- 76% of the CAWI respondents gave a clear answer (a non-refusal) to all 4 questions, compared to 53% on interviewer assisted CAPI
- 11% of the interviewer assisted CAPI sample refused to answer all the statements, compared to 2% of the CAWI sample.

By combining the insights gleaned from the above two statistical analyses it is possible to offer the following interpretations:

- Interviewing through self completion, via CAPI and online rendered more honest answers
- Different patterns in answering the questionnaire suggested CATI interviewing was subject to two dynamics:
    - Firstly a "Yes" effect, where it is generally easier for the respondent to reply in the affirmative to proceed with the interview
    - The higher ratio of downloading activities to illegal activities when compared to other methodologies suggested distrust of the interviewer's agenda during latter stages of the interview
- Online panellists were more knowledgeable of the subject matter.
- Unlike the CATI respondents, CAWI respondents, through their regular experience of the survey process and relationship with the panel brand, were more transparent in their responses[3].

[3] As described above, this analysis has removed some of the bias associated with an online sample. The online bias is still subject to online bias.

## 3.6 Summary and Conclusions

In order to summarise the chief findings of the methodology testing, it is worth looking at each one alongside each other in terms of how they significantly differed from the other two, with explanations for why we think this might have been the case.

### 3.6.1 Summary of the adults' surveys

| Methodology | Key findings | Explanation and Observations |
|---|---|---|
| CAPI | There was lower awareness and participation in file-sharing in general on CAPI compared to the other two methodologies, and hence limited numbers admitting to any illegal activity. | Internet usage was lighter in general, compared to CAWI in particular.<br>The presence of an interviewer seemed to lead to a higher number of refusals and don't knows, as well as some apparent conditioning. This was less of an issue when respondents self-completed elements though. |
| CATI | The CATI sample generated similarly high awareness and participation in general file-sharing to CAWI, yet had even lower proportions of admission to illegal behaviour than CAPI. | The "Yes" effect was prominent until a considered answer was required. This was particularly noticeable as the results were high in terms of general downloading / sharing, but then much lower for admission to illegal activity.<br>There was a noticeable reluctance to admit to illegal activity to an interviewer at a distance, presumably as they were unsure of the consequences. |
| CAWI | CAWI had similarly high levels of awareness and participation in file-sharing to CATI, but had much higher admission of illegal activity. | There were clearly more high frequency internet users in the sample, thus it generated a higher sample of downloaders / sharers.<br>The self-completion method and perception of anonymity also seemed to result in more honesty and understanding than other methods. |

### 3.6.2 Summary of the children's surveys

| Methodology | Key findings | Explanation and Observations |
|---|---|---|
| CAPI | Many of the key aggregated results were consistent across CAPI and CAWI, but the sample sizes of file-sharers generated were ultimately too low to allow robust analysis of paid and illegal proportions within specific categories. | Children seemed to be less prohibited by interviewer presence than adults, and hence not as affected by conditioning.<br>Unlike adults, internet access and usage was not a big issue as it is prominent amongst this demographic anyway.<br>That said, music was the only category that gained a significant number of file-sharers, and hence the problem with analysing quantity within categories. |
| CATI | CATI achieved erratic results, and a number of contradictions:<br>A significant number of children claimed to have no internet access, but still went on to claim downloading (including illegally).<br>CATI also had higher penetration of illegal downloading than the other two, but then much lower opinion that you should be able to download what you want from the internet for free. | The need to explain the subject matter during the parent consent process appeared to lead to the 'odd' internet access claims.<br>The 'yes' effect was even more noticeable in some cases than on the adults' survey. e.g. File-sharing services used in the last 3 months, which had much higher results than the other two methodologies in general. |
| CAWI | Many of the key aggregated results were consistent with CAPI. However, the sample sizes for specific categories were healthier on CAWI. | As with CAWI adults, the self-completion nature appeared to generate honesty in the children's results. However, this benefit was not as marked, since interviewer presence seemed to have less of an effect.<br>The larger sample size overall allowed analysis of quantity by category, which wasn't possible on CAPI or CATI. |

### 3.6.3 Conclusions

Given the observations that have been made, we believe that there are strong benefits for including CAWI Omnibus as the primary methodology for this study. These benefits are as follows:

- It is the most suitable / relevant methodology to the subject matter.
- It is seemingly the most likely to generate honesty, due to being entirely self-completion. i.e. removing the interviewer conditioning effects.
- It contains a larger incidence of high frequency internet users; key to qualification for the downloading questions, and hence providing a more robust sample / higher representation of both legal and illegal file-sharers with which to profile and cut the data. This sample can be down-weighted in order to provide the true proportion amongst all adults.

However, despite these benefits, it is clear that a CAWI sample cannot be considered representative in isolation as it:

- Eliminates 65+ year olds altogether
- Eliminates those without internet access, who are still vital for their opinions and awareness.
- Provides only a handful of low frequency internet users, who are less likely to download or share files but are again necessary for a representative sample.

Our conclusion is therefore that a single methodology approach to the project is not sufficient, and a mixed one would yield the most accurate and representative results. All the missing elements from CAWI can feasibly be supplemented by a CAPI methodology, which does appear to be more reliable than CATI.

Amongst children 12-15, it again seems sensible to employ a CAWI methodology. Although interviewer conditioning seemed to be less marked amongst 12-15 year olds on CAPI, there is a vast cost difference between the two methodologies (CAPI being much more expensive for fewer interviews).

It is possible to emulate this approach using the same data that has already been discussed, and this provides the focus of the next chapter.

# 4. Stage 2: The Chosen Methodology

As deliberated in the previous section, we have concluded that the most sensible approach to this study would be to adopt a mixed approach as the 'chosen methodology'. In terms of the tracker going forward there are a number of further recommendations we would make in hind-sight and these are indicated in section 5. However, it is useful to first emulate the recommended design with the data from the testing pilot in order to display the results as they would have been if we had adopted this approach from the outset.

## 4.1 Technical makeup

The technical make-up of the 'chosen methodology' has been selected by filtering the data from three of the sources – Adults CAWI, Adults CAPI and Kids CAWI. The sample breakdown thus comes out as follows:

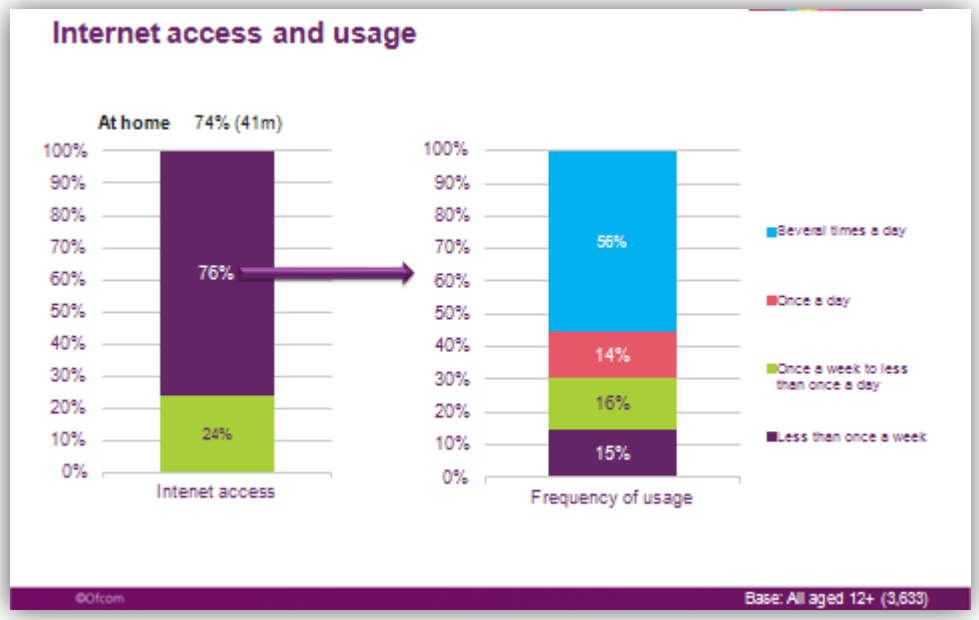
| Methodology | Description | Sample |
|---|---|---|
| CAWI adults | 16-64 year olds who use the internet at least once a day | 1,948 |
| CAPI adults | 16-64 year olds who use the internet less than once a day | 338 |
| CAPI adults | 16-64 year olds without internet access | 288 |
| CAPI adults | All 65+ year olds | 538 |
| CAWI Kids | All 12-15 year olds | 521 |
| | | **3,633** |

In order to address any remaining imbalances in the overall sample, a fairly complex weighting matrix has been followed using a combination of figures from UK TGI 2009 & Census 2008. This consists of a set of rim weights covering age, social grade, region, and frequency of internet usage variables Once the rim weights had been applied, the data was grossed up to reflect the estimated UK 12+ population of 55.8m.

The matrix is displayed on the next page…

| GROSSING FACTOR IS 55815.7 (000) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **IF CAWI 16+ ADULTS SAMPLE** | | | | | | | | |
| | AND ABC1 | | | | AND C2DE | | | |
| | AND 16-24 | 25-44 | 45-64 | 65+ | AND 16-24 | 25-44 | 45-64 | 65+ |
| AND Male | 2.9% | 7.6% | 5.4% | n/a | 5.7% | | 2.3% | n/a |
| AND Female | 8.8% | | 4.5% | n/a | 2.1% | 5.0% | | n/a |
| **IF CAPI 16+ ADULTS SAMPLE** | AND ABC1 | | | | AND C2DE | | | |
| | AND 16-24 | 25-44 | 45-64 | 65+ | AND 16-24 | 25-44 | 45-64 | 65+ |
| AND Male | 4.8% | | | 4.5% | 9.1% | | | 3.7% |
| AND Female | 7.8% | | | 6.0% | 5.0% | | 4.7% | 4.8% |
| **IF CAWI KIDS** | | | | | | | | |
| AND Male | 2.7% | | | | | | | |
| AND Female | 2.6% | | | | | | | |
| IF (CAPI ADULT 16+ OR CAWI ADULT 16+) AND Access the Internet Every DAY/Most DAYS | 48.3% | | | | | | | |
| IF (CAPI ADULT 16+ OR CAWI ADULT 16+) AND Access the Internet 2 - 3 times a WEEK | 11.4% | | | | | | | |
| IF (CAPI ADULT 16+ OR CAWI ADULT 16+) AND Access the Internet Less Often | 10.3% | | | | | | | |
| IF (CAPI ADULT 16+ OR CAWI ADULT 16+) AND Do not access the Internet | 24.7% | | | | | | | |
| IF CAWI KIDS | 5.3% | | | | | | | |
| Standard Region: Scotland | 8.32% | | | | | | | |
| Standard Region: Northern Ireland | 2.68% | | | | | | | |
| Standard Region: North England (Yorkshire/Humberside, North, North West) | 24% | | | | | | | |
| Standard Region: Midlands (East/West Midlands, East Anglia, Wales) | 25% | | | | | | | |
| Standard Region: South England (Greater London, South West, South East) | 40% | | | | | | | |

After weighting, the profile of internet access and usage now closely reflects that of the UK population as follows:

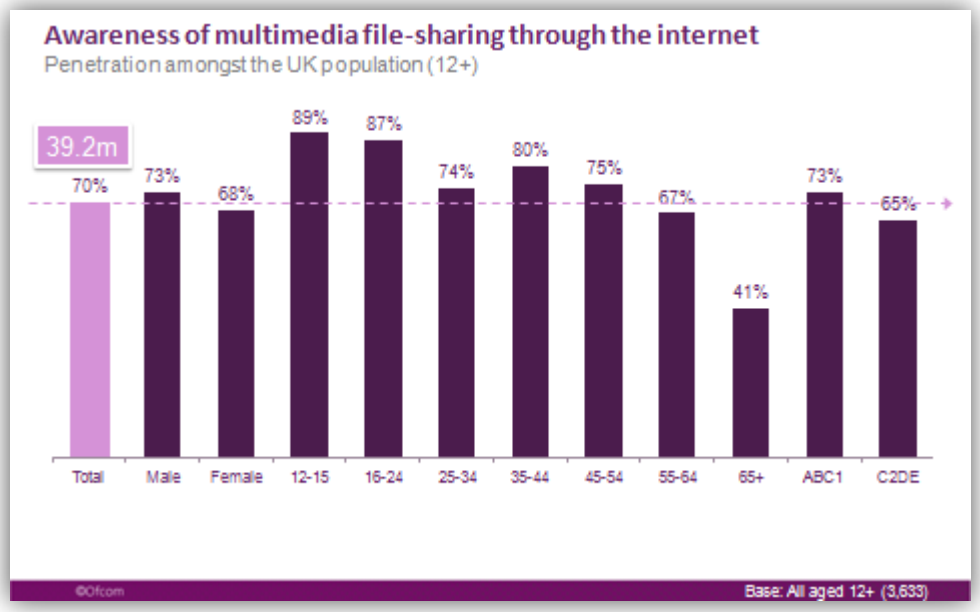



The next section will describe the main findings of the study amongst 12+ year olds…

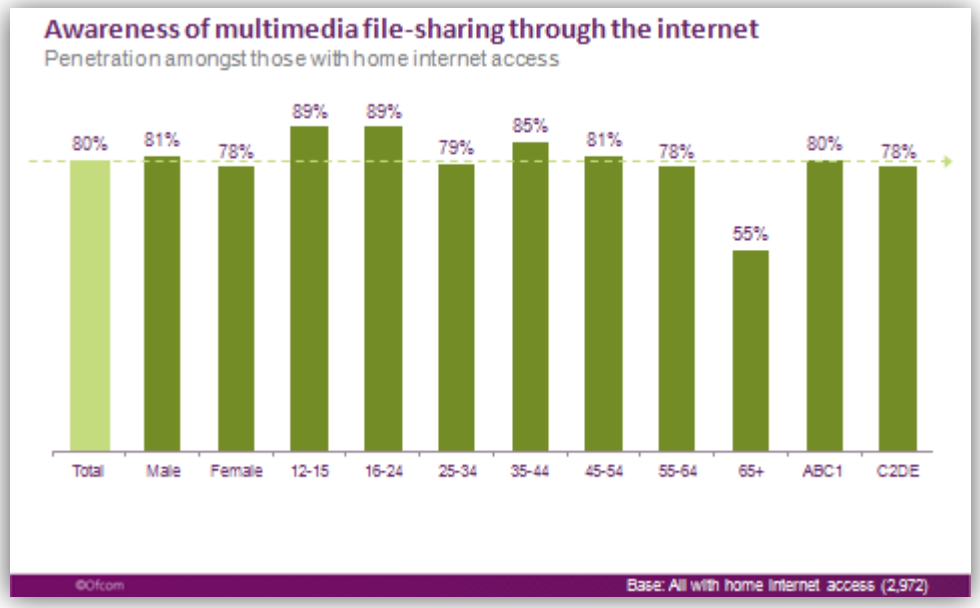
## 4.2 The results amongst 12+ year olds in the UK

### 4.2.1 General file sharing – Awareness and activity

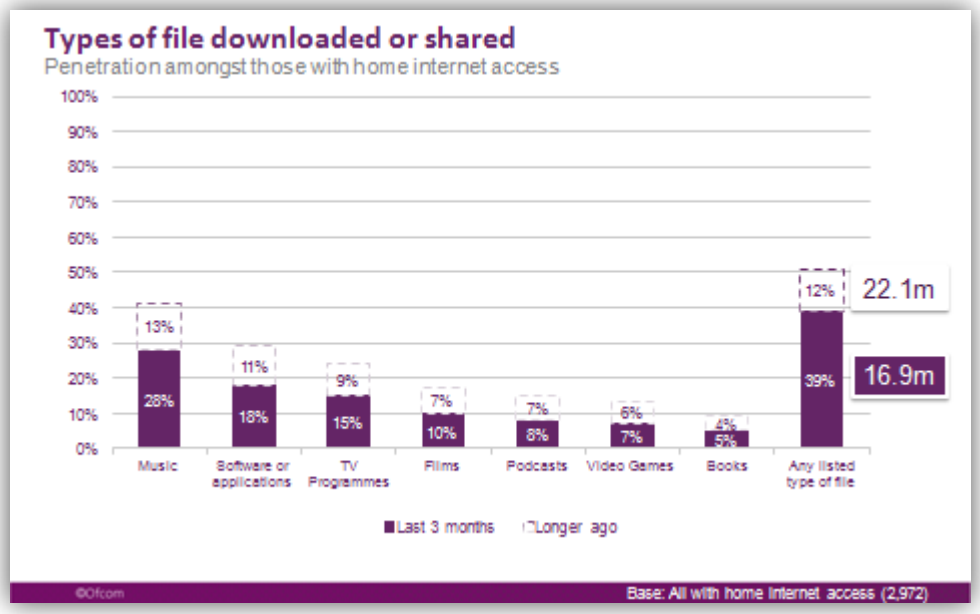
70% of the UK population are aware of downloading or sharing multimedia files, equating to 39.2 million people. Penetration is highest amongst males (73%), younger aged groups (88% of 12-24 year olds) and ABC1s (73%). The most significantly different section of the population compared to the total is amongst 65+ year olds, with just 2 in 5 aware that you can download or share multimedia files through the internet.



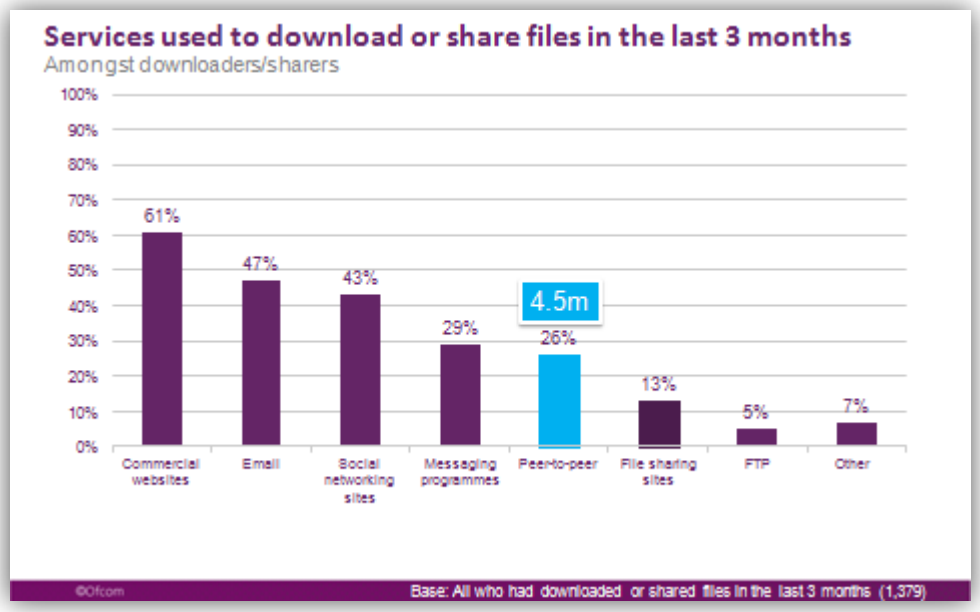

Focussing specifically on those with internet access at home, the overall penetration rises to 80%: There is a slight convergence towards the mean amongst demographics, by taking those who don't have home access out of the equation. Although the figure for 65+ year olds rises to 55%, they still remain by far the lowest incidence group.



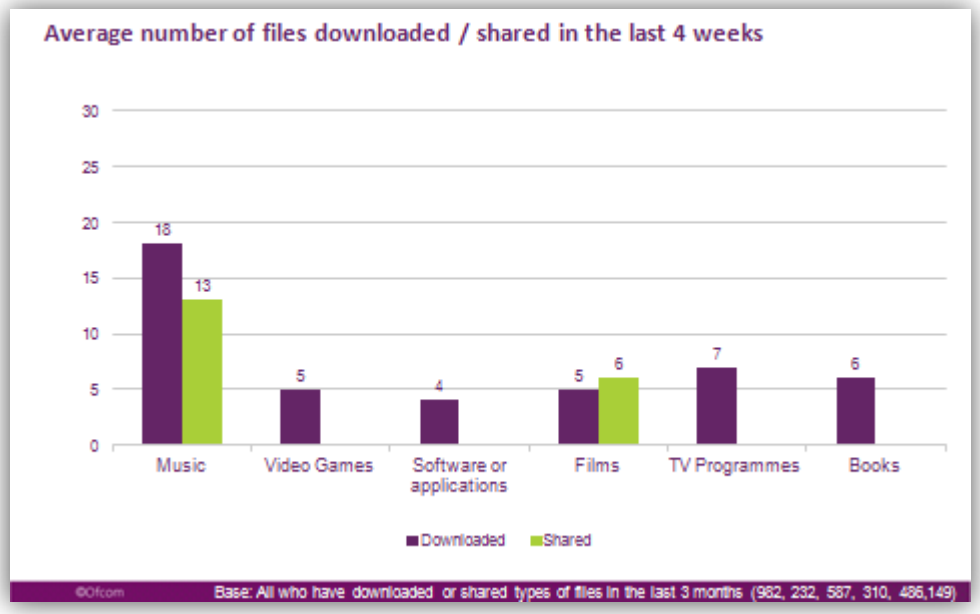
Over half of 12+ year olds with internet access at home claim to have downloaded or shared any of the types of multimedia file that were covered by the survey; this equates to 22.1 million people in the UK. Of these, the majority (16.9 million) have done so in the past 3 months. The most popular category is music; of all those who claim to have downloaded or shared files at all, 80% have downloaded or shared at least one music file - 41% of the home internet population.



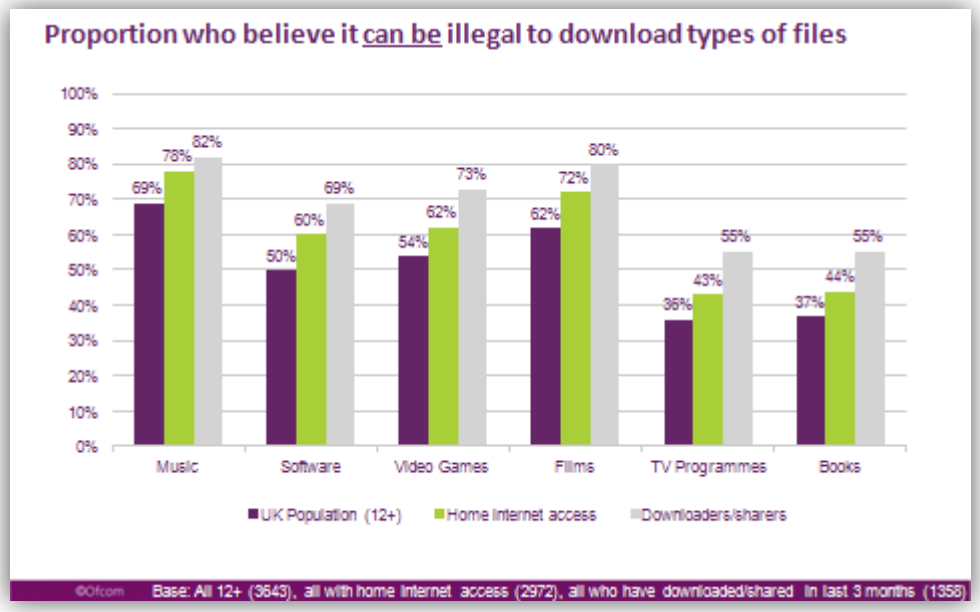

Commercial websites such as iTunes and Amazon are the main source for downloading files, with 3 in 5 downloaders having accessed such sites for this purpose in the last 3 months. However, a quarter of downloaders claim to have used peer-to-peer services such as BitTorrent and Limewire (the most popular facilitators of illicit file-sharing), equating to around 4.5 million people.



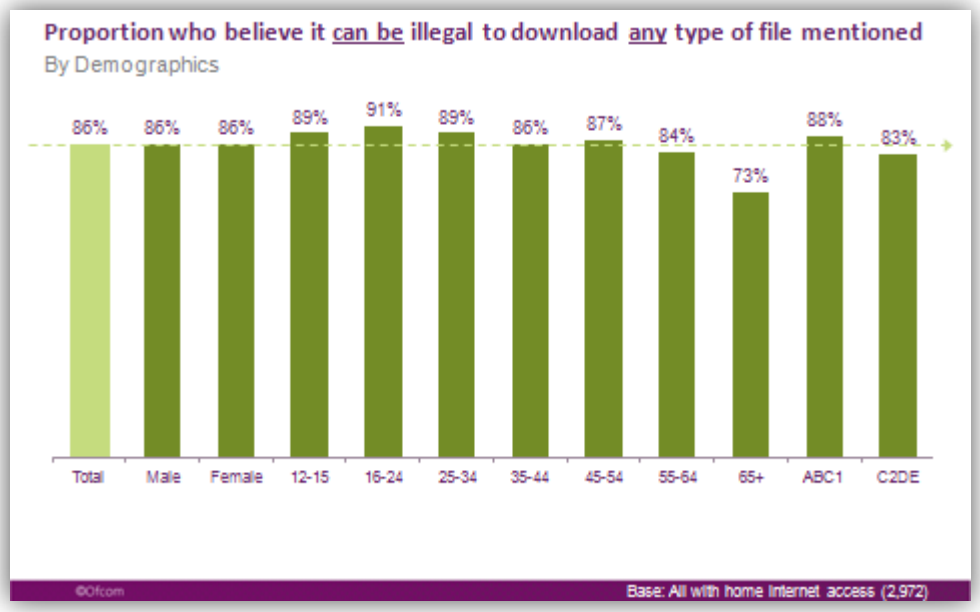
In terms of quantity, music is again the most popular category for downloading and sharing with an average of 18 files downloaded over a four week period; 4.5 per week. The other multimedia categories of interest all share similar quantities over a month, ranging from 4 for software and applications, to 7 for TV programmes.



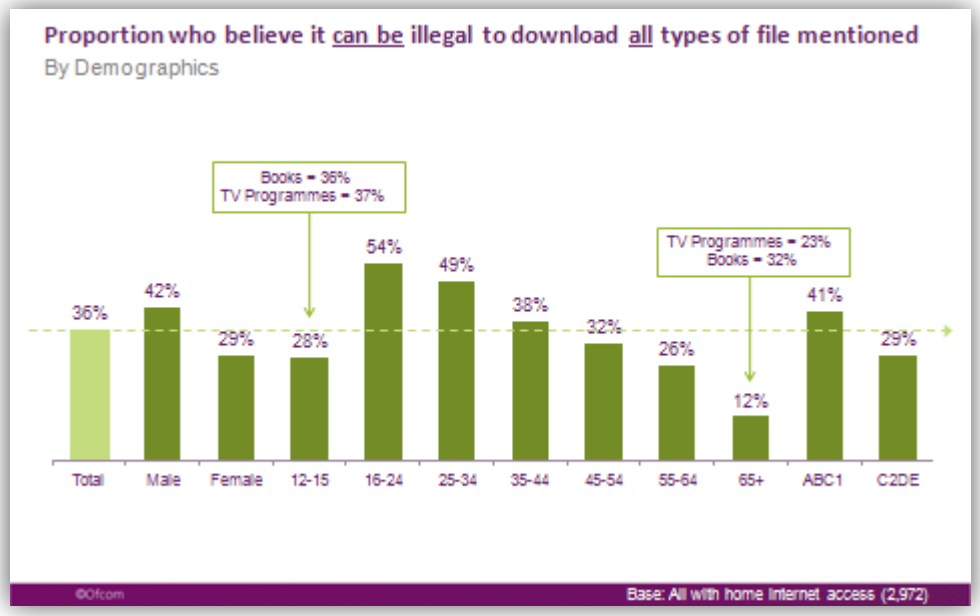

7 out of 10 people in the UK are aware that it can be illegal to download music files, rising to 8 out of 10 amongst those who partake in file-sharing. Films also have a similar level of awareness amongst this group (80%). Awareness that it can be illegal to download TV programmes and books is comparatively lower - 55% of downloaders/sharers are aware.



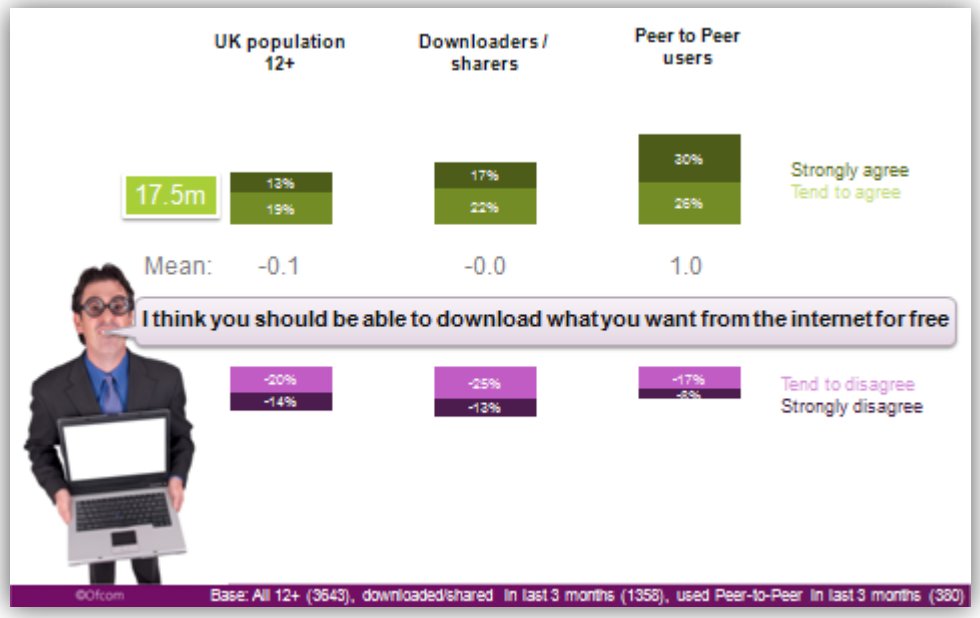
Analysing awareness across all categories, the majority (86%) of those aged 12+ with home internet access are aware that at least one of the types of file can be illegal. This is fairly steady across demographics, although awareness is highest amongst 16-24s (91%), and lowest amongst 65+s (73%)



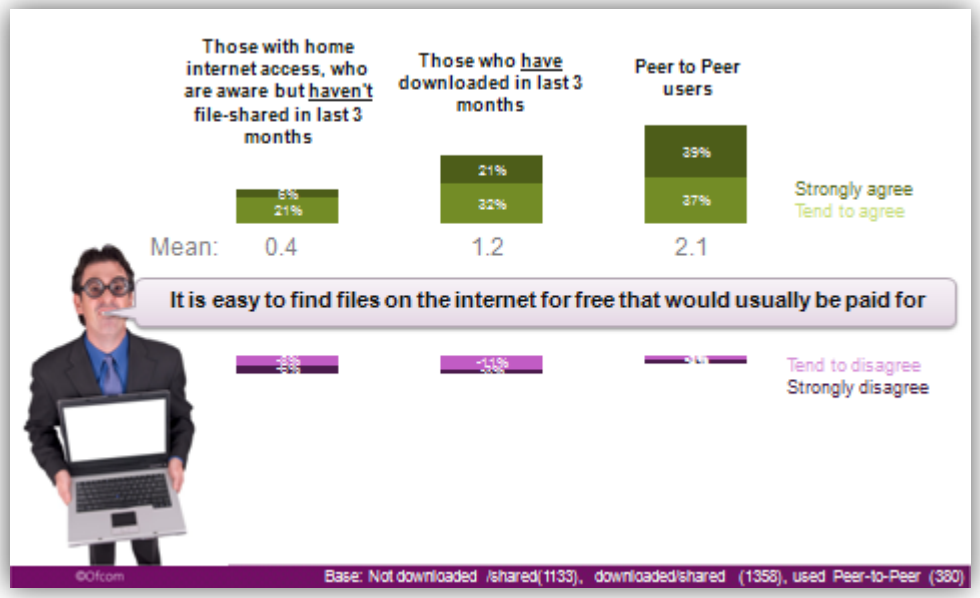

When focusing on the proportion of people who recognised that all types of files of interest can be potentially illegal to download, the differences are much more pronounced, falling sequentially with age past the 16-24 group, ranging from 54% for 16-24 year olds to 12% for 65+ year olds. Interestingly, amongst 12-15 year olds, the low awareness that TV programmes or books can be illegal to download reduces the total incidence to 28%, almost half the incidence amongst 16-24s.



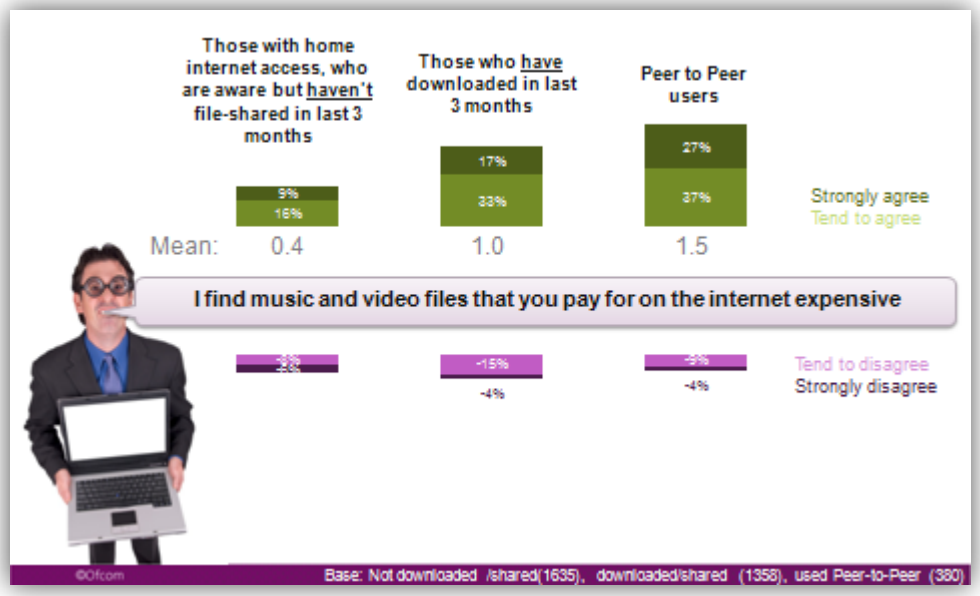
Agreement on whether you should be able to download what you want from the internet for free is almost completely mirrored across the entire UK population - 13% strongly agree, compared to 14% who strongly disagree; 19% slightly agree, compared to 20% who slightly disagree. This pattern is still reflected when focusing on file-sharers, with 39% agreement and 38% disagreement. However, amongst peer-to-peer users the opinion becomes much more skewed to the positive, with 56% agreement, compared to 25% disagreement.



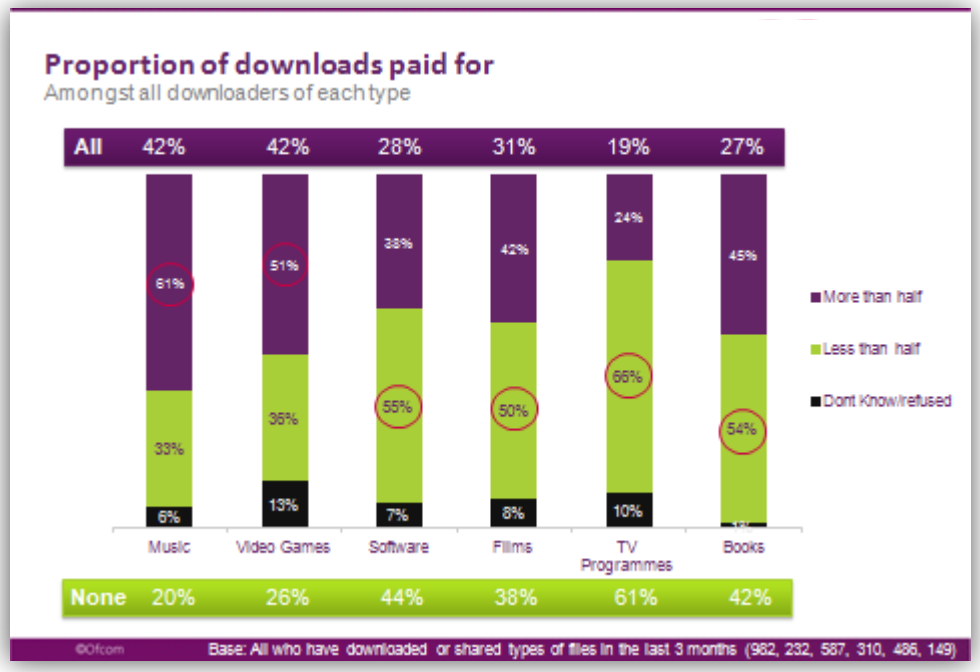

Finding free 'commercial' files is seen as easy amongst downloaders, particularly peer-to-peer users; 4 out of 10 strongly believed this, rising to almost 8 out of 10 for any type of agreement. Amongst those who have home internet access, but claim <u>not</u> to have downloaded in the last 3 months, accessibility doesn't seem to be a key off-putter, since over a quarter agree; that said, the majority (a third) simply don't know.



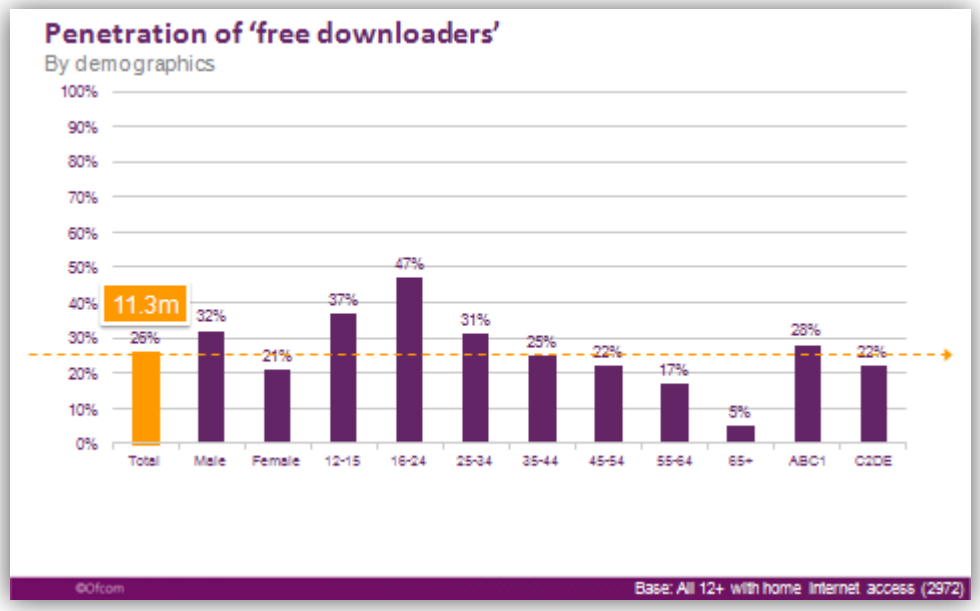
Price of legally available files on the internet appears to be a key driver for the usage of peer-to-peer networks. Three quarters of peer-to-peer users believe that the music and video files that you pay for on the internet are expensive. That said, agreement is generally high anyway suggesting it does seem to be a prohibitive factor for everyone, regardless of whether the user seeks out free (and possible illegal) alternatives or not.



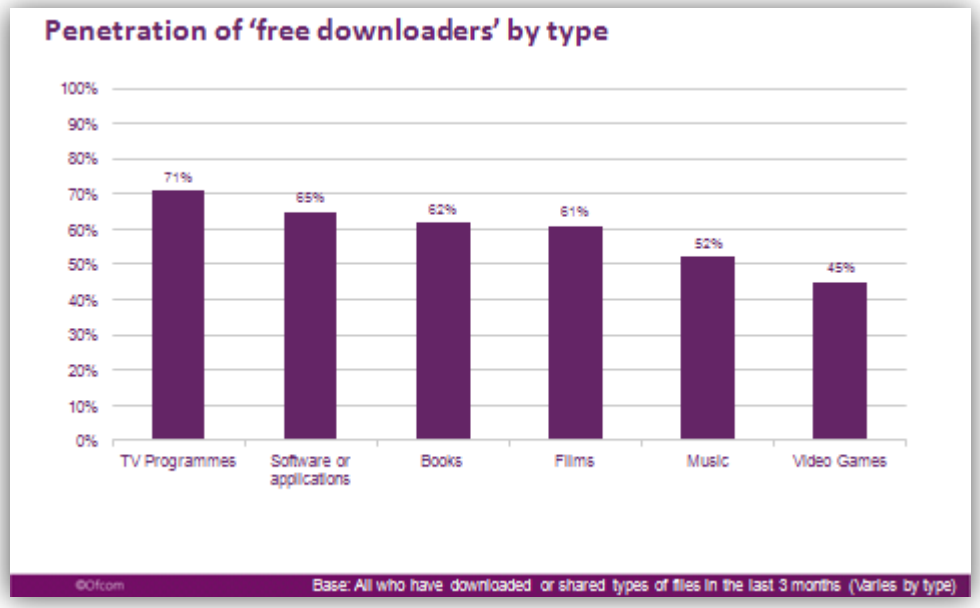

Music (61%) and video games (51%) are the only two file types in which 'more than half' outscores 'less than half' in terms of the proportions paid for. In each case, the majority of respondents generally claim *all or nothing*. The clearest example of this is TV programmes with 61% claiming none were paid for, and 19% claiming all of it was (80% in total).



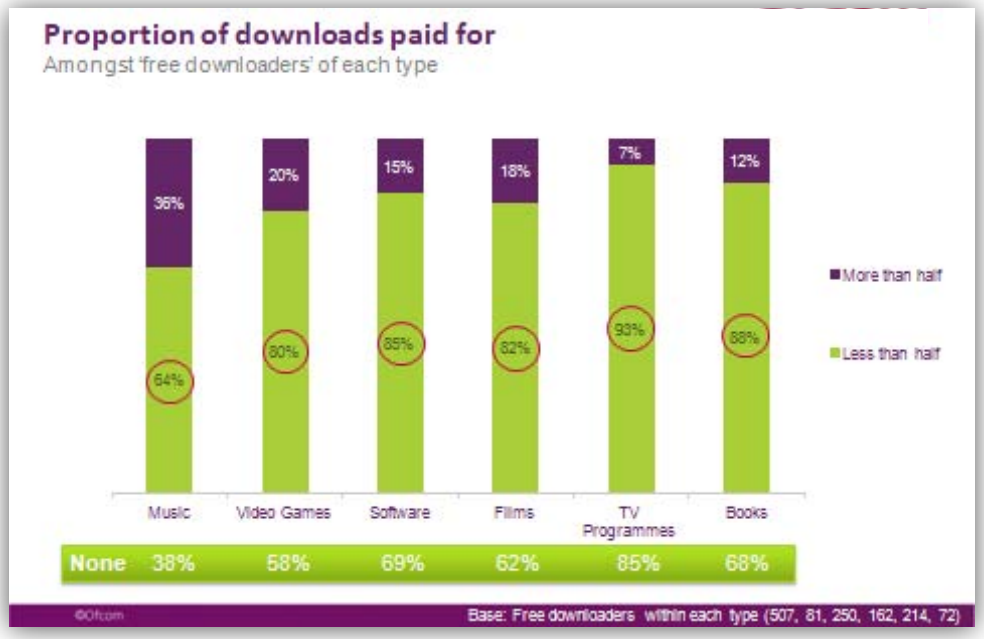
Using a net figure for all categories, there are a projected **11.3 million 'free downloaders'** in the UK (aged 12+), 26% of the home internet population. Free downloading is most prominent amongst males (32%), 16-24s (47%), and 12-15s (37%).



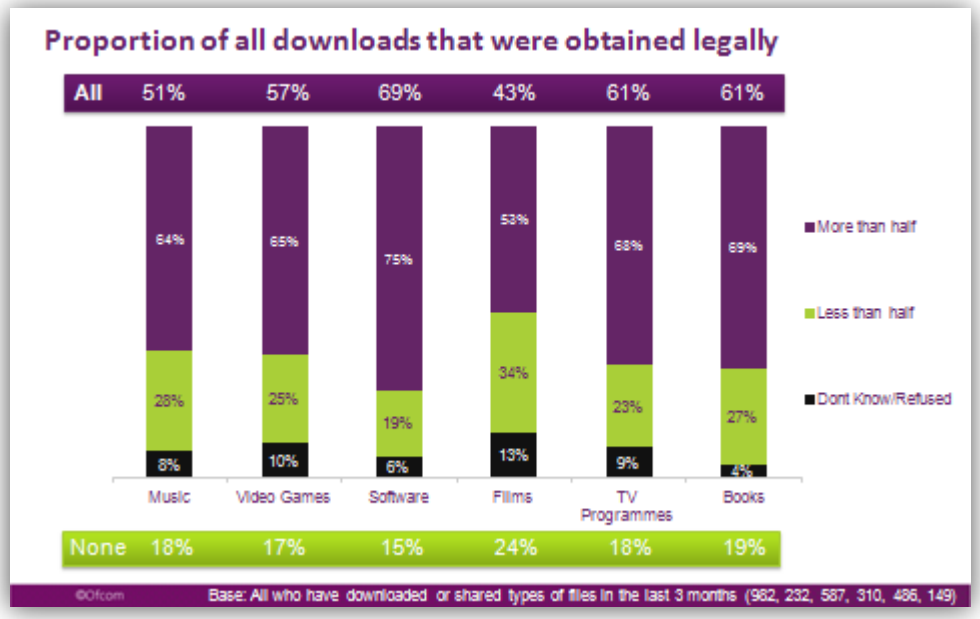

As already inferred, TV programmes is the category that has the highest penetration of free downloading within it. This is somewhat unsurprising since there are evidently fewer commercial sites selling TV programmes than most of the other categories, particularly in the United Kingdom. 'Video Games' is the only category that has lower than 50% incidence of free downloading at 45%. Again, this is no surprise, as most commercial video games are widely available to purchase on CD or DVD, but very few are available for downloading via commercial websites.



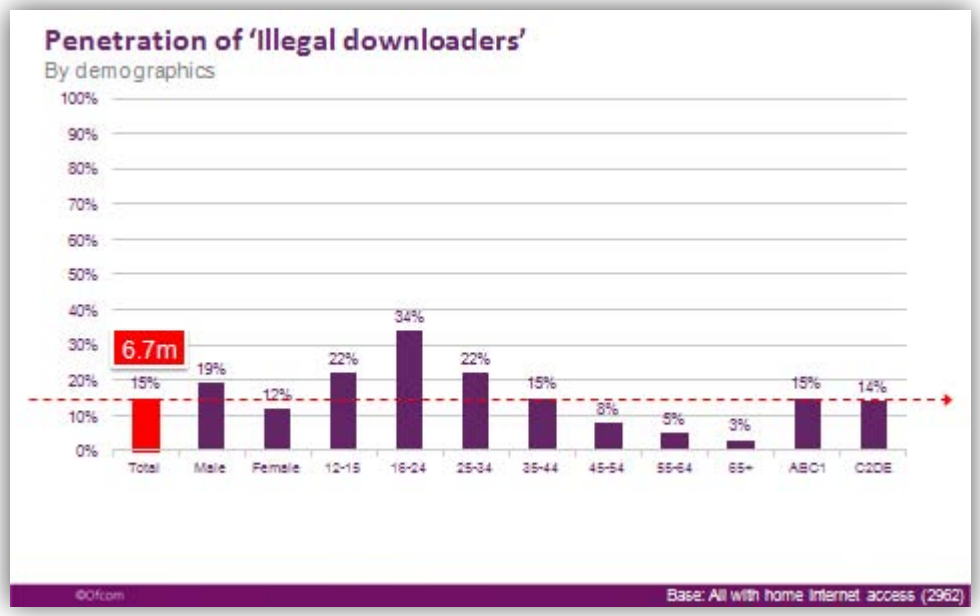
Those who download free files at all tend to get mostly free files, although it is less the case for music than in other categories - 64% have paid for less than half. The following chart shows each category filtered by those who had claimed to have downloaded or shared them in the past 3 months:



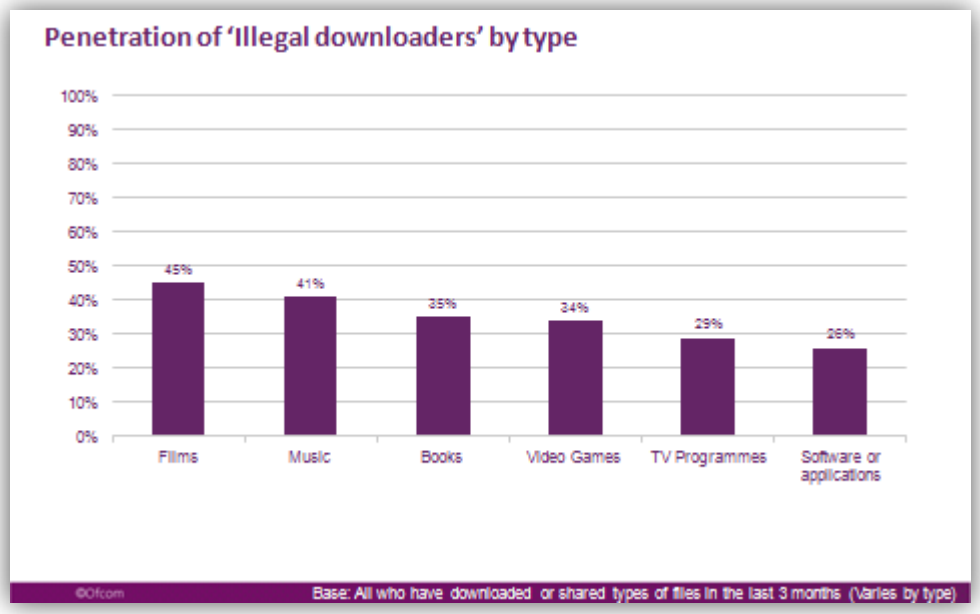

All of the file categories that were covered by the survey had the majority of people claiming more than half were obtained legally. The category where this was least prevalent was films; 1 in 4 film downloaders admitted that 'none' were obtained legally, with a further third stating that less than half were legal.



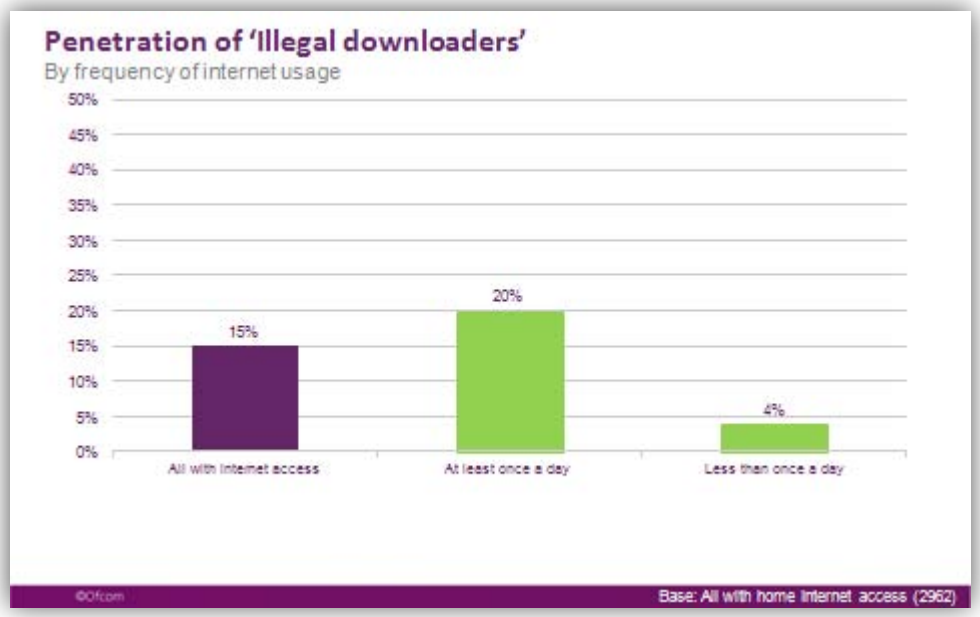
Grouping together all categories, there are a projected **6.7 million 'illegal downloaders'** (past 3 months) in the UK (aged 12+). The pattern of penetration amongst demographics is similar to free downloading, albeit at a lower level, with 16-24s again being the most prominent age group (34%), and 65+ being the lowest (3%)



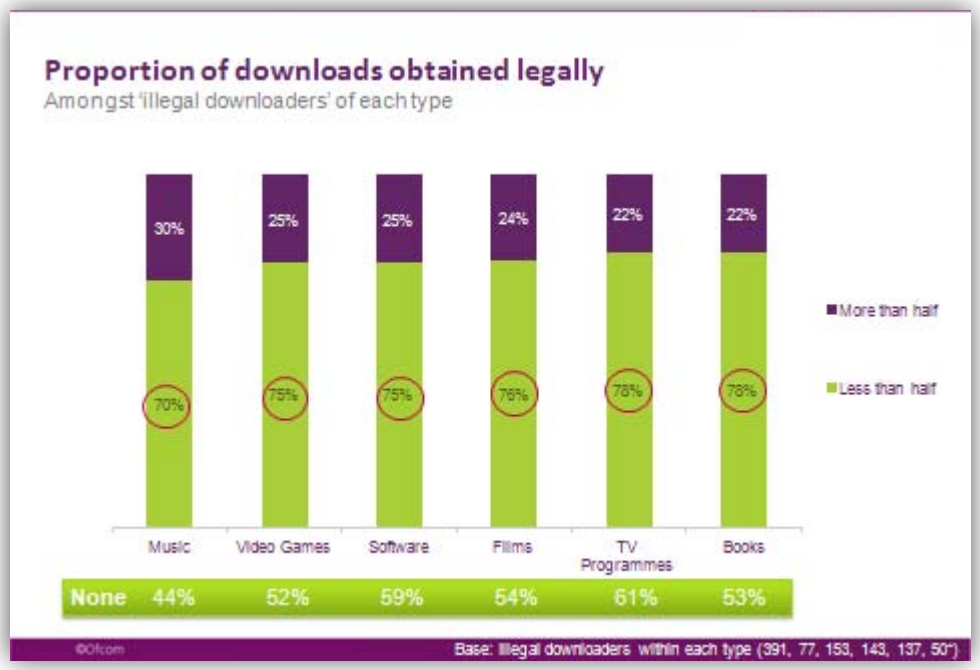

Although at an overall level music has the highest actual number of illegal downloaders (close to 5 million in total), films is the category that has the highest penetration of illegal downloading within itself - 45%. In this respect, even the lowest type - software and applications - has a quarter of downloaders admitting to some illegal sourcing.



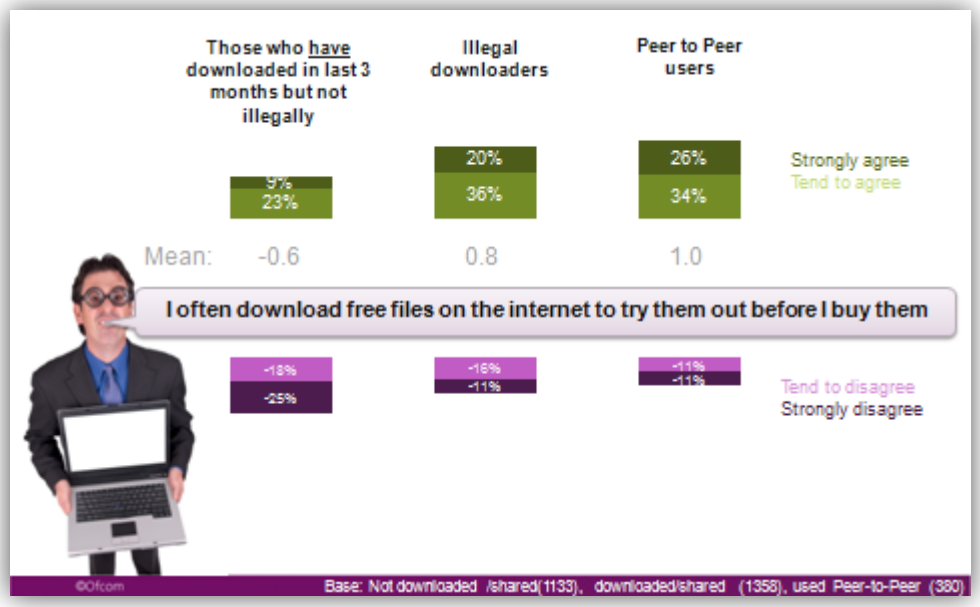
Unsurprisingly, illegal downloading is much more prevalent amongst heavy internet users; 1 in 5 of those who use the internet every day admitted to a degree of illicit downloading, compared to 1 in 25 of those who use the internet less frequent than this.




Similar to the pattern observed for free downloading, those who download illegally tend to get most of their files in this way. Across topics, the proportion that claim to download less than half legally ranges from 70% for music to 78% for books and TV programmes. In fact, music is the only category in which more than half of illegal downloaders claimed to pay for any of the files they download (56%). Moreover, 59% of illegal downloaders downloaded all files illegally in at least one of the categories.

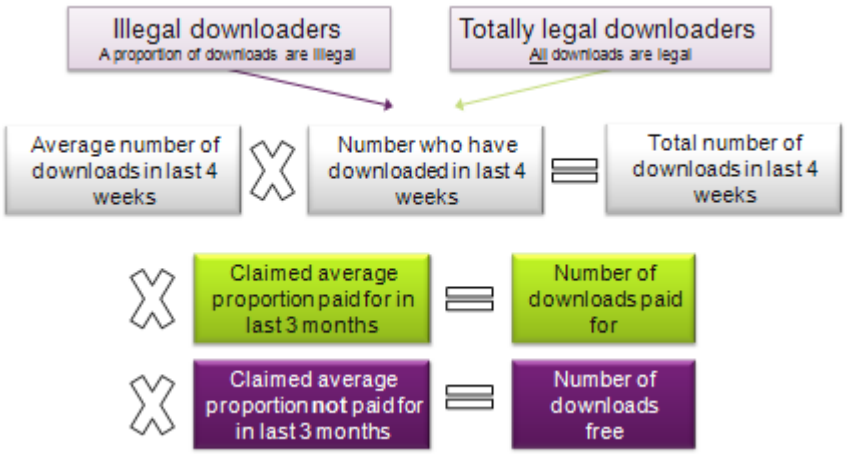


This goes someway in dispelling the theory that illegal downloaders spend more money on legal downloads, but this analysis alone cannot prove conclusive and as such the topic requires further investigation. Before doing so, it is necessary to look at the agreement levels for the statement 'I often download free files on the internet to try them out before I buy them', since this is the main justification often given by those who illegally download. The figures are displayed below:




Indeed, it is clear that the high majority of those who download illegally, and peer-to-peer users, claim to do this – 56% agreement amongst the former, and 60% amongst the latter. This compares to 31% for those who claim not to download anything illegally.

With this in mind, it is possible to test these claims to some extent by estimating the comparative volumes of paid downloads using the following formula:




The results of this analysis are displayed overleaf:

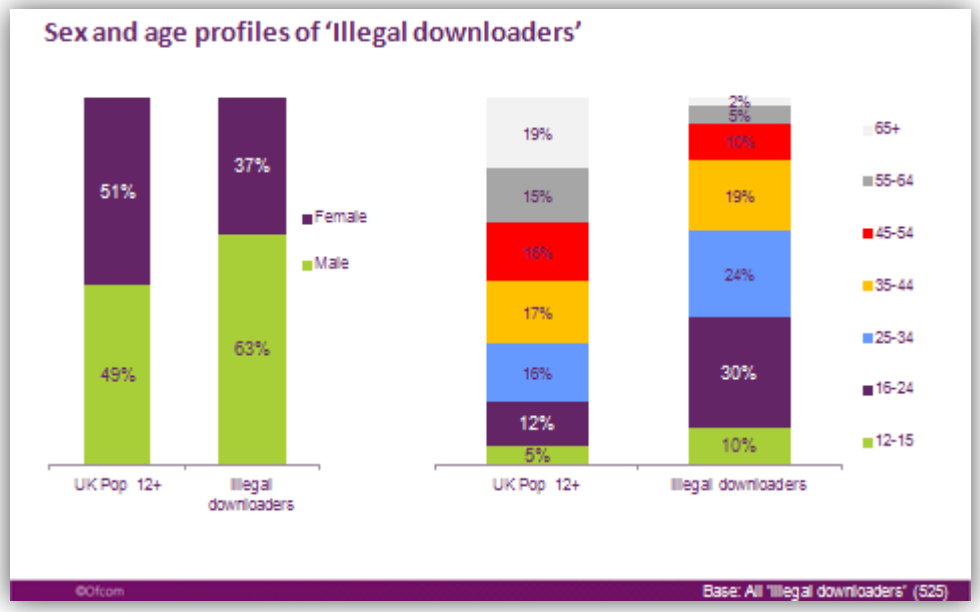
***Number of files downloaded in the last 4 weeks (av = average per person, per month)***

| | Illegal downloaders | Totally legal downloaders |
|---|---|---|
| Base: | (301) | (507) |
| **MUSIC TRACKS** | 80.6m | 106.2m |
| Paid for | 45m (9.7av) | 78.7m (13.1av) |
| Free | 35.6m (7.7av) | 27.5m (4.6av) |
| Base: | (77) | (103) |
| **VIDEO GAMES** | 5.1m | 7.1m |
| Paid for | 2.6m (2.9av) | 4.6m (3.1av) |
| Free | 2.5m (2.8av) | 2.5m (1.7av) |
| Base: | (153) | (403) |
| **SOFTWARE & APPS** | 9.5m | 19.9m |
| Paid for | 4m (2.2av) | 8.2m (1.6av) |
| Free | 5.5m (3.2av) | 11.7m (2.3av) |
| Base: | (133) | (136) |
| **FILMS** | 10.1m | 7.6m |
| Paid for | 3.7m (2.1av) | 4.7m (2.7av) |
| Free | 6.4m (3.7av) | 2.9m (1.7av) |
| Base: | (137) | (301) |
| **TV PROGRAMMES** | 15.3m | 18.6m |
| Paid for | 3.8m (2.3av) | 5.5m (1.5av) |
| Free | 11.5m (6.8av) | 13m (3.5av) |
| Base: | (50) | (94) |
| **BOOKS** | 4.9m | 6.2m |
| Paid for | 1.6m (2.3av) | 3.5m (2.7av) |
| Free | 3.3m (4.8av) | 2.7m (2.1av) |

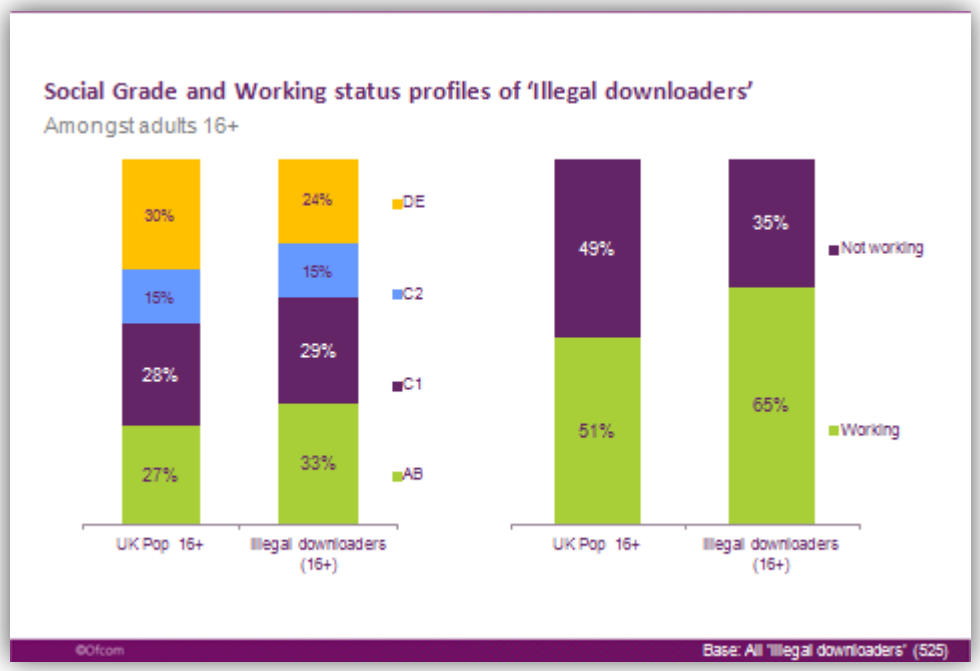
This analysis further dispels the theory that those who download illegally spend more on legal downloads than those who don't: In all cases, the total number of downloads paid for by legal downloaders exceeds that of illegal downloaders. For music, the average number of tracks paid for by illegal downloaders equates to 9.7 per month (c45 million paid downloads in total), compared to 13.1 for those who claim to never illegally download (c78.7 million paid downloads in total).

While this analysis does show that legal downloaders pay for more legal files than illegal downloaders, it's also possible that illegal downloaders wouldn't pay for any if they hadn't sampled them first. Therefore it is still possible that illegal downloaders pay for more downloads as a result of sampling illegally.

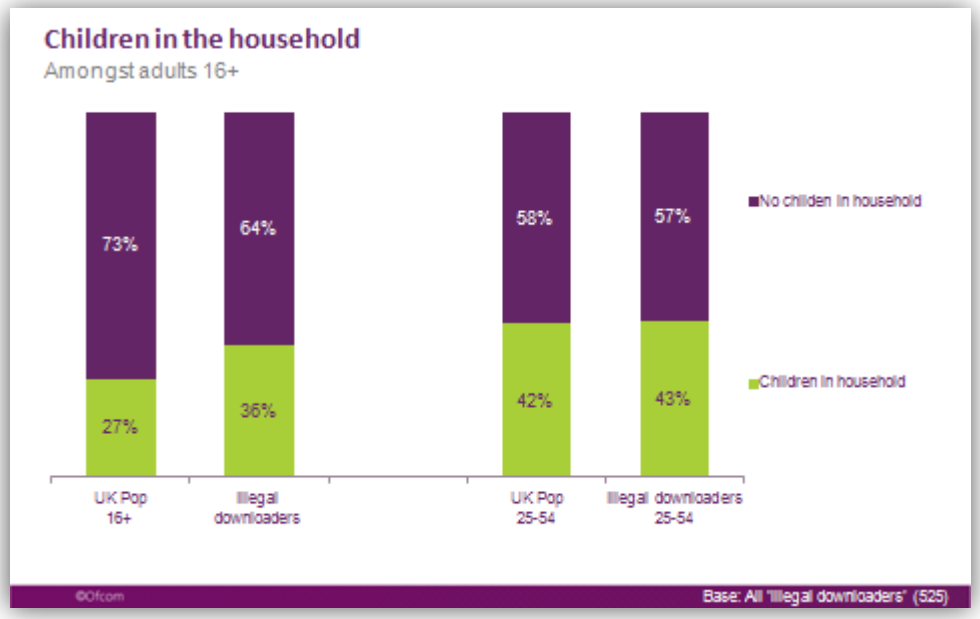
Moving on to the demographic profiles of illegal downloaders, 3 in 5 are male whereas two thirds are aged under 34. This is a much younger and male orientated profile than the UK 12+ population in general. The figures are displayed in the chart overleaf:




In terms of socio-demographics, illegal downloaders are predominantly ABC1 (62%) and working (65%). This is somewhat inevitable since this group of people are more likely to have internet access anyway; 90% of working ABC1s do so, compared to 63% of the rest of the population.

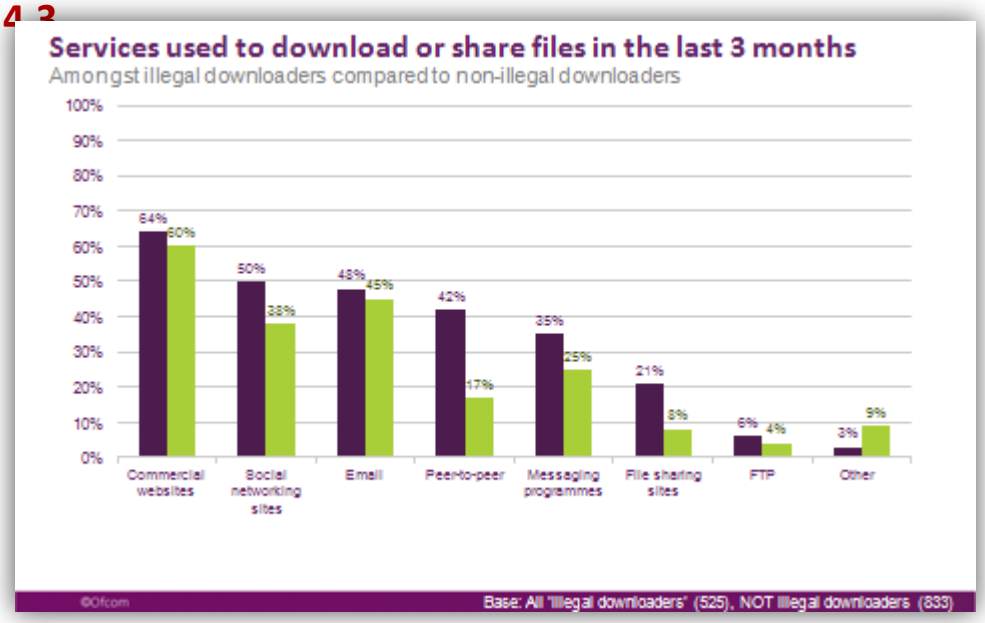



It is a common theory that households containing children are logically more likely to be inhabited by illegal downloaders. However, although this is correct, the data suggests that this could be more a function of age than a specific contributor to illegal downloading; 43% of illegal downloaders have at least one child in the household; this figure is virtually the same for all adults between the ages of 25 and 54 (42%).




All online file-sharing facilities have a higher incidence amongst illegal downloaders than amongst those who claim to never illegally download. However, as to be expected, the differences are more pronounced for those most commonly connected with illegal activity. For example, peer-to-peer usage has the widest difference between the two groups (42% compared to 17%), and file-sharing websites also differ significantly (21% compared to 8%).

4.3



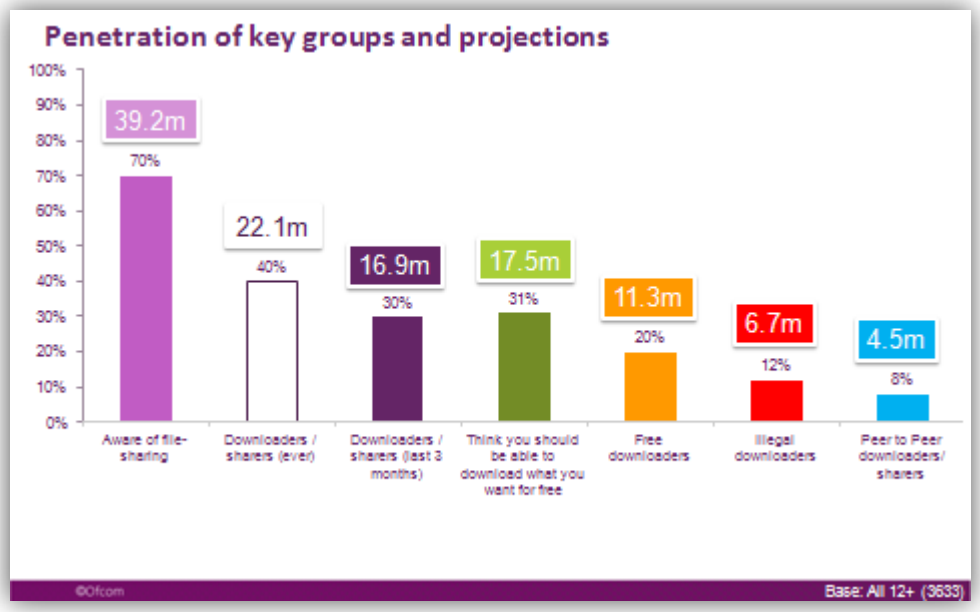
## Summary of results

Based on the data from the 'chosen methodology' the results are summarised as follows:

- 8 out of 10 people over the age of 12 with home internet access are aware of file-sharing. This is fairly consistent across the ages, though it is significantly lower amongst 65+ year olds.
- Three quarters of those who have ever downloaded or shared files have done so in the last 3 months. This accounts for 40% of those with home internet access.
- The profile of downloaders / sharers is skewed towards males and under 44s
- Music is the most popular type of file, with 72% of downloaders having downloaded at least one music track in the last 3 months. It also accounts for the highest volume of downloaded and shared files – the average number of music tracks downloaded over a 4 week period is 18.
- Commercial websites are the main sources for file-sharing, with 3 in 5 downloaders having accessed such sites for this purpose in the last 3 months. A quarter of downloaders claim to have used peer-to-peer services; this figure equates to 42% of illegal downloaders.
- The majority of those who download or share files are aware that certain types of files can be illegal to download. For example, over three fifths of the population are aware that music and films can be illegal to download. TV programmes and books are less stated, with close to 4 in 10 of all 12+ year olds (55% of file-sharers) aware of each.
- Agreement that you should be able to download what you want from the internet for free is split down the middle amongst the general population and amongst general downloaders/sharers. It rises considerably amongst peer-to-peer users, with 56% in favour, compared to 25% against.
- Downloaders generally believe it is easy to find free files on the internet that you would usually pay for. It is also the consensus that files that you pay for on the internet are expensive, particularly amongst peer-to-peer users
- Music and video games are the only categories in which over half of those who download them claim to pay for more than half.
- Almost half of 16-24 downloaders/sharers are free-downloaders i.e. they download at least some of their files for free. Free-downloaders tend to gain most of their files without paying.
- All categories have a significant presence of illegal downloading, but films have the highest proportion within. A quarter claimed that none of their film downloads were legal.
- Illegal downloaders account for 15% of the internet population (12% of the total population). The profile is very male orientated, and 16-24s are the most prominent age group, with 1 in 3 downloading at least some of their files illegally.
- Illegal downloaders are more likely to have children in their household, but this appears to be more a function of age than a specific contributor.

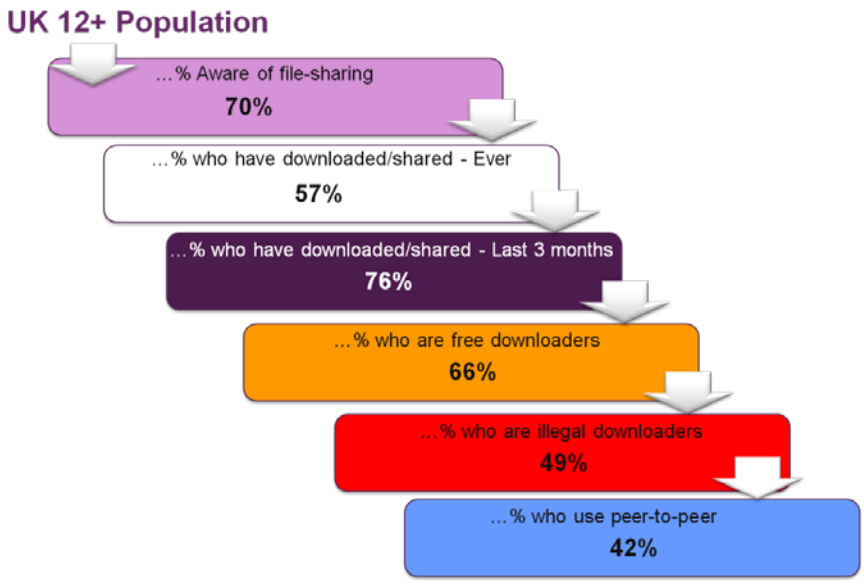
- Those who download illegally tend to download the majority of their files in this way. 59% of illegal downloaders downloaded all files illegally in at least one of the categories.
- 56% of illegal downloaders (60% amongst peer to peer users) claim that they download free files to try before buying. However, further analysis suggests that in general they don't download more paid files than those who never illegally download (with higher averages paid for per month amongst the latter).

The following chart displays the key incidence levels and projected populations observed, amongst all 12+ year olds in the UK:




From an alternative perspective, it is clear that one step in the file-sharing process tends to lead to the next up to the point of free downloading, with the decision to illegally download evenly split (49% of those who download free files do so illegally).

This is demonstrated by the following diagram:



## 4.4 Future Recommendations

Based on the results of the pilot, and the subsequent analysis on the 'chosen methodology', our recommendation for the future tracking study is to adopt a hybrid CAWI (Online) and CAPI (Face-to-face) methodology, as outlined in the previous section.

The recommendation to employ an Omnibus methodology will heavily depend on the questionnaire length, and any additional requirements in this respect. Should the questionnaire length be deemed feasibly short enough to include on an Omnibus study, we feel that it makes sense to adopt this approach going forward from both a consistency and financial perspective.

To summarise the three distinct methodologies we recommend:

1. **CAWI Adults** = 16-64 year olds who use the internet at least once a day (c1,900 interviews)
2. **CAPI Adults** = 16-64 year olds who use the internet less than once a day + adults aged 65+ (c875 interviews)
3. **CAWI Kids** = Children aged 12-15 (c500 interviews)

This would total approximately 3,275 interviews per wave. We assume that the tracker will be quarterly, and will thus generate around 13,100 interviews per annum.

In addition to the above we would recommend the following:

- We recommend the inclusion of a question relating to internet speed, which clearly has a bearing on the likelihood to download multimedia files. We would suggest that a simple question will suffice, asking whether the respondent has access to broadband within the home.
- For the entire CAPI sample, we recommend that a self-completion methodology is offered for the questions on file-sharing. It is clear that this method drives more honest responses for any sensitive questions. Although, we do have some concerns that older age groups might prefer to be asked the questions due to being less technically proficient on the whole, it would actually be only those who claim to partake in file-sharing who would be required to self-complete. We therefore believe that if they are proficient enough to download via a computer, they should have little trouble in using the CAPI machine with an interviewer's guidance.
- We feel that it would benefit the study to be able to study this data at both a population and household level. This doesn't apply to the attitudinal questions which primarily focus on personal opinion and cannot be inferred for the rest of the household. We therefore recommend that a second weighting matrix is applied in isolation for the behavioural questions. These household weights would be discussed with Ofcom statisticians, should Kantar Media be commissioned to conduct the full tracker.

# 5. Technical Appendix

## 5.1 Methodology Descriptions

This section offers further technical details pertaining to the sampling and administrative aspects of the methodologies that were tested.

### 5.1.1 The Adults' Surveys (16+ year olds)

***TNS Face-to Face (CAPI) Omnibus***

The TNS CAPI Omnibus offers the largest weekly face-to-face consumer survey in the UK. Each survey interviews 2,060 different adults aged 16+. It is a high quality and cost-effective research solution for those who need to access a representative sample or specific sub-groups of the population.

TNS CAPI Omnibus uses a comprehensive address based system using PAF and CD-Rom, cross referenced to the census data. For each wave of TNS CAPI Omnibus, 143 sample points are selected and, within the selected primary sampling points, a postcode sector is chosen. Postcode selection within primary sampling points alternates between A and B halves to reduce clustering effects. All interviews are conducted via the TNS field team and in accordance with strict quality control procedures. Quotas (by sex, working status and presence of children) are set during interviewing to ensure representativeness, whilst any sample profile imbalances are corrected at the analysis stage through weighting.

***TNS Telephone (CATI) Omnibus***

TNS Phonebus normally interviews a nationally representative sample of 1,000 adults aged 16+ across Great Britain each weekend. However for this study we offered a minimum of 2,000 adults aged 16+ (no upper age limit) overall, incorporating a boost of 60 additional interviews in Northern Ireland to ensure UK coverage.

The master sample of telephone numbers is derived from a large database of residential numbers from across Great Britain. New numbers are generated from this basic list by adding and subtracting up to 40 from each original number; this is known as random digit dialling (RDD). The listing of new numbers is then de-duplicated, and excess numbers removed, to give a master sample representative of Great Britain in its Standard Region profile.

***TNS Online (CAWI) Omnibus***

The TNS OnlineBus survey runs twice a week, covering 1,000 adults aged 16-64 each time. For this study, we utilised two waves, and each was boosted with 30 adults in Northern Ireland, thereby giving a minimum of 2,060 adults in the UK from the combined results of the two surveys.

The sample for TNS online omnibus is initially selected using demographic information already held from Kantar's 'Lightspeed' consumer panel (This information is regularly updated, since it is a fully managed panel). The panelists are then invited via email to take part in the survey, and various demographic quota targets are monitored to ensure the end sample profile is representative of Great Britain (UK in this case).

### 5.1.2 The Children's Surveys (12-15 year olds)

***Face-to-face (CAPI) – Ad hoc***

For the face-to-face children's (12-15) element, we adopted an ad-hoc approach to the study with interviews conducted on CAPI machines. Dummy starting addresses were selected using a national spread of points based on standard regional percentages, as well as the likelihood to have families with 12-15 year olds. Interviewers were then instructed to follow a random route procedure from the starting address. Quotas were set on gender (50:50).

In accordance with the MRS Code of Conduct, parental permission was required before interviewing any 12-15 year olds in the household. Parents were given a full description of what the survey was about, as well as being told that a small part of the survey covered illegal activity. We ensured that both the adult and the child were able to refuse taking part at any point.

***Telephone (CATI) – Ad hoc***

The telephone based children's element was also run as an ad-hoc study. The sample was taken from an in-house demographic database that originated from RDD (Random Digit Dialling). As the adult respondent had completed a previous Omnibus study, and indicated that they had a child in their household between the age of 12 and 15, we were able to do a degree of targeting. Quotas were set on gender (50:50).

In accordance with the MRS Code of Conduct, once we had made telephone contact we asked to speak to an adult in the household, and requested permission to interview any 12-15 year olds in the household. In the wording of the introductory script, it was necessary for us to provide a full description of what the survey was about and to flag up that a small part of the survey asked about illegal activity. We ensured that both the adult and the child were able to refuse taking part.

***TNS – Online (CATI) KidsBus***

Each wave of the TNS Online KidBus reaches 1,000 GB children aged 8-15. However, in this case we only required sample for the 12-15 categories which resulted in 521 interviews in total. Invitations to complete the questionnaire are emailed out to a sample of GB online panellists who have agreed to participate in market research, and have children in the relevant age group. They pass the completion of the survey on to their child having agreed the child can participate. The survey is open for a week and then closed when the required sample profile has been achieved. Questionnaire filters and data checks are automatically applied during the course of the self-completion interview, resulting in high quality data collection.

## 5.2 The Questionnaire

ASK ALL

QA: How many mobile phones in total do you and members of your household use?

Single-code

1. One
2. Two
3. Three
4. Four or more
5. None
6. Don't know

ASK ALL WITH INTERNET ACCESS

QB. Thinking of all the things you use the Internet for, and regardless of where and how you access it, please tell me overall how often you personally access the Internet?

Single-code

1. Several times a day
2. Once a day
3. 5-6 days a week
4. 2-4 days a week
5. Once a week
6. 2-3 times a month
7. Once a month
8. Less often
9. Don't Know

ASK All

Q1: Which of the following do you think the internet can be used for?

Multi-code

1. Make telephone calls
2. Read the news
3. Download and share music, video games, software, films, TV programmes and video
4. Watch live TV programmes
5. Look at maps from around the world
6. Book train tickets
7. Vote in a general election

ASK IF Q1 = 3

Q2: Have you ever downloaded or shared any of the following through the internet? If so, which ones?

Multi-code, Rotate

1. Yes – music
2. Yes – video games
3. Yes – software or applications
4. Yes – films
5. Yes – TV programmes
6. Yes – books
7. Yes - podcasts
8. Yes – other type of file. Please specify
9. No
10. DK

ASK IF Q2 = 1 to 7.

Q3: Have you downloaded or shared any of the following through the internet in the last three months? If so, which ones?

Multi-code, Show in same order as Q2

Only show codes mentioned at Q2

1. Yes – music
2. Yes – software or applications
3. Yes – video games
4. Yes – films
5. Yes – TV programmes
6. Yes – books
7. Yes - podcasts
8. Yes – other type of file. Please specify
9. No
10. DK

ASK IF Q2 = 1 to 7

Q4: Which of these have you used in the last three months in order to download or share files through the internet?

Multi-code, Do not rotate

1. Peer-to-peer such as BitTorrent, Gnutella, eDonkey, Limewire and Ares
2. Commercial websites such as iTunes, Blinkbox, Amazon, Lovefilm, Movieflix, Napster, Play, or Spotify
3. Social Networking sites such as Facebook, Myspace, or Bebo
4. File sharing websites such as Rapidshare, Yousendit, or Easyshare
5. Messaging programs such as Windows Messenger or Skype
6. FTP
7. Email
8. Other (please specify)
9. Can't remember

IF Q3 = 1

Q5a1: How many music tracks do you think you have downloaded through the internet in the last 4 weeks? Please count an album as the equivalent of ten songs

ALLOW RESPONDENT TO CODE ACTUAL NUMBER AND CODE INTO BANDS BELOW

IF RESPONDENT STATES DK ASK THE FOLLOWING BANDS DIRECTLY:

1. None
2. 1 to 5
3. 6 to 10
4. 11 to 20
5. 21 to 50
6. 51 to 100
7. Over 100
8. DK
9. Refused

IF Q3 = 1

Q5a2: How many music tracks do you think have you shared with others through the internet in the last 4 weeks?"

ALLOW RESPONDENT TO CODE ACTUAL NUMBER AND CODE INTO BANDS BELOW
IF RESPONDENT STATES DK ASK THE FOLLOWING BANDS DIRECTLY:

1. None
2. 1 to 5
3. 6 to 10
4. 11 to 20
5. 21 to 50
6. 51 to 100
7. Over 100
8. DK
9. Refused

IF Q3 = 2

Q5b: How many video games (excluding patches and upgrades) do you think you have downloaded through the internet in the last 4 weeks?

ALLOW RESPONDENT TO CODE ACTUAL NUMBER AND CODE INTO BANDS BELOW
IF RESPONDENT STATES DK ASK THE FOLLOWING BANDS DIRECTLY:

1. None
2. 1
3. 2
4. 3
5. 4 to 10
6. 11 to 20
7. 21 to 30
8. 31 to 50
9. Over 50
10. DK
11. Refused

IF Q3 = 3

Q5c: How many software products or applications (excluding patches and upgrades) do you think you have downloaded through the internet in the last 4 weeks?

ALLOW RESPONDENT TO CODE ACTUAL NUMBER AND CODE INTO BANDS BELOW
IF RESPONDENT STATES DK ASK THE FOLLOWING BANDS DIRECTLY:

1. None
2. 1
3. 2
4. 3
5. 4 to 10
6. 11 to 20
7. 21 to 30
8. 31 to 50
9. Over 50
10. DK
11. Refused

IF Q3 = 4

Q5d1: How many films do you think you have you downloaded through the internet in the last 4 weeks?
ALLOW RESPONDENT TO CODE ACTUAL NUMBER AND CODE INTO BANDS BELOW
IF RESPONDENT STATES DK ASK THE FOLLOWING BANDS DIRECTLY:

1. None
2. 1
3. 2
4. 3
5. 4 to 10
6. 11 to 20
7. 21 to 30
8. 31 to 50
9. Over 50
10. DK
11. Refused

IF Q3 = 4

Q5d2: How many films do you think you have you shared with others through the internet in the last 4 weeks?
ALLOW RESPONDENT TO CODE ACTUAL NUMBER AND CODE INTO BANDS BELOW
IF RESPONDENT STATES DK ASK THE FOLLOWING BANDS DIRECTLY:

1. None
2. 1
3. 2
4. 3
5. 4 to 10
6. 11 to 20
7. 21 to 30
8. 31 to 50
9. Over 50
10. DK
11. Refused

IF Q3 = 5

Q5e: How many TV programmes do you think you have you downloaded through the internet in the last 4 weeks? Please do not include the use of iPlayer, ITV Player, Sky Online or 4OD.
ALLOW RESPONDENT TO CODE ACTUAL NUMBER AND CODE INTO BANDS BELOW
IF RESPONDENT STATES DK ASK THE FOLLOWING BANDS DIRECTLY:

1. None
2. 1
3. 2
4. 3
5. 4 to 10
6. 11 to 20
7. 21 to 30
8. 31 to 50
9. Over 50
10. DK
11. Refused

IF Q3 = 6

Q5e: How many books do you think you have you downloaded through the internet in the last 4 weeks?
ALLOW RESPONDENT TO CODE ACTUAL NUMBER AND CODE INTO BANDS BELOW
IF RESPONDENT STATES DK ASK THE FOLLOWING BANDS DIRECTLY:

1. None
2. 1 to 5
3. 6 to 10
4. 11 to 20
5. 21 to 50
6. 51 to 100
7. Over 100
8. DK
9. Refused

ASK ALL

Q6. Which of the following, if any, do you think can be illegal to download?

1. Music
2. Software
3. Video games
4. Films
5. TV programmes
6. Books
7. None of these

ASK ALL

Q7. How much do you agree or disagree with the following statements?
a) I think that you should be able to download what you want from the internet for free
b) It is easy to find files on the internet for free that would usually be paid for
c) I often download free files on the internet to try them out before I buy them
d) I find music and video files that you pay for on the internet expensive

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. DK

ASK Q8-Q9 IF Q3 = 1 to 6
REPEAT Q8 AND Q9 IN TURN FOR EACH TYPE DOWNLOADED/SHARED AT Q3. ROTATE ORDER

Q8. Thinking about the <category from Q3> you have downloaded or shared through the internet in the past three months, approximately what proportion of this did you pay for?

1. All of it
2. Over three quarters
3. Between half and three quarters
4. Between a quarter and a half
5. Less than a quarter
6. None
7. DK

Q9. And approximately what proportion would you say you obtained legally?

1. All of it
2. Over three quarters
3. Between half and three quarters
4. Between a quarter and a half
5. Less than a quarter
6. None
7. DK