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UK Stream-ripping Online Piracy Study

Research conducted November – December 2016

Overview and key findings

Prepared for PRS for Music by Kantar Media

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PRS for MUSIC | Intellectual Property Office

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Contents

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1 Introduction

This report details the main findings of a large-scale consumer tracking study looking specifically at stream-ripping activity and attitudes among people aged 16+ in the UK. The study was commissioned and financially supported by PRS for Music and the UK Intellectual Property Office (IPO).

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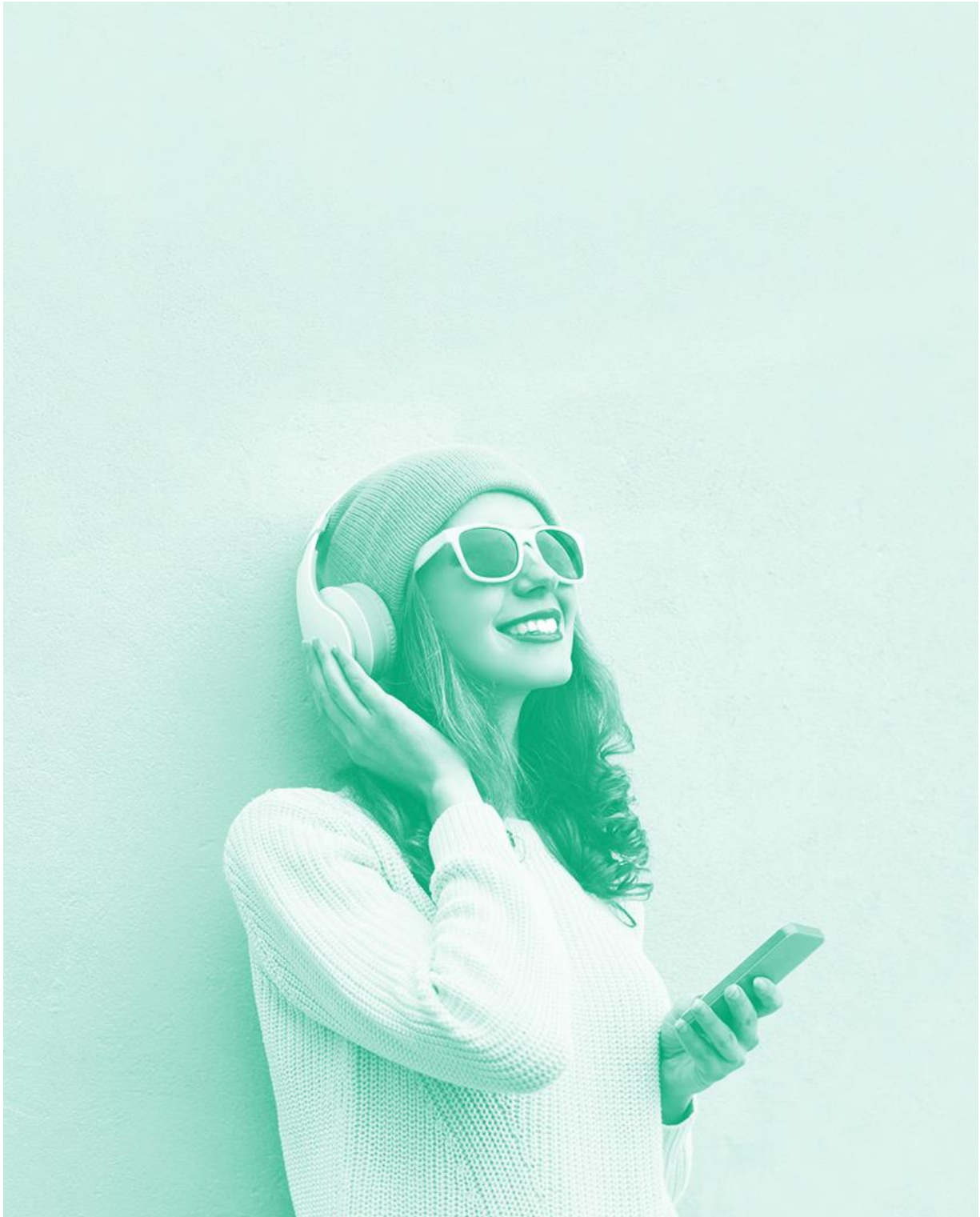
2 Research notes

Types of services assessed

Within this study, we sought to provide measurements for five core types of stream-ripping services:

- **Download apps**, source and download content from licensed services – delivering through an app.
- **Download sites**, source and download content from licensed services– delivering through a website.
- **Stream-ripping sites**, allow the user to download content from licensed services, via the input by the user of the URL/link for where the content is made available on the licensed service.
- **Stream-ripping plug-ins**, otherwise known as browser extensions, provide browser level functionality allowing for streamed content to be downloaded. The advantage of these services is that the ripping functionality can be turned on and off by the user in real-time without the need to switch between the streaming service and the stream ripping service. Content can also therefore be downloaded in bulk, removing the need to download files one by one.
- **Stream-ripping software**, is downloaded via developer websites, software or review sites, and allows for streamed content to be copied, or ripped, and stored as a downloadable file.

Key Metrics

The following key metrics were assessed at an individual service level:

- Awareness
- Usage (frequency and devices used)

More generally, the research also looked at attitudes surrounding:

- The rights and permissions of stream-ripping services
- Reasons for using stream-ripping services

There was also a focus on more general (i.e. not limited to illegal) behaviours, including:

- Devices used to listen to music on
- Services used to access music (including frequency)

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The limitations of claimed behaviour

Consumer research provides one source of insight into the extent and patterns of online content consumption. Other potential sources include analysis of ISP internet traffic, internet audience analysis and direct measurement of online activity (for example, by monitoring activity on stream-ripping websites). On their own, none of these sources presents a complete picture of this group of people who use such services, and each has strengths and limitations. Data in this report (particularly usage) is not directly comparable to other data sources.

Furthermore, questions on unlawful behaviour have a particular reliance on honesty, which is also likely to affect accuracy to some degree i.e. result in under-claim for unlawful behaviour. We have extensive experience of question design looking at illegal downloading, streaming and sharing and have used this best practice experience to ensure that honesty was encouraged and our data was therefore collected as honestly as possible.

3 Key Findings

- 57% of UK adults claimed to be aware of stream-ripping services, with downloader apps (11%) the most common type of service in terms of awareness. The results showing a clear trend for increasing awareness/use with decrease in age.
- The research found that 15% of all UK adults aged 16+ years claimed to have used a stream-ripping service. Men and those in the ABC1 social grades were more likely to claim to be stream-rippers and as with awareness we saw a clear downward trend in claimed usage as age increased.
- The research covered 5 types of stream-ripping service with download apps the most commonly used by stream-rippers (among stream rippers we found: download apps 54%, stream-ripping sites 34%, download site 30%, stream-ripping plug-in 28%, stream-ripping software 18%).
- Stream-rippers were most likely to say they had used a computer/laptop (78%), with mobile devices at 52% and other devices at 33%, using an average of 1.63 device types to stream-rip across these 3 platforms.
- 18% of stream-rippers said that these services did not have the necessary rights/permissions to rip content in this way. Alternatively a quarter (24%) of stream-rippers believed that such services would have the necessary rights and permissions to allow them to download or rip content. Though for many there was a less clear cut response around the legality of these services.
- The research also found that a quarter of stream-rippers felt that downloading content in this way was wrong, with 1 in 5 saying they did not personally feel they were doing anything illegal. However when we look at those who said these sites did not have the

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necessary legal rights/permissions we find that 43% of this group said using these types of service was wrong.

- When we look at the reasons driving stream-ripping the most common response was that the music was already owned in another format (31%), with wanting to listen to music offline (26%) and on the move (25%) the next most commonly given responses. Unaffordability (21%) and feeling official content is overpriced (20%) coming in after these reasons.
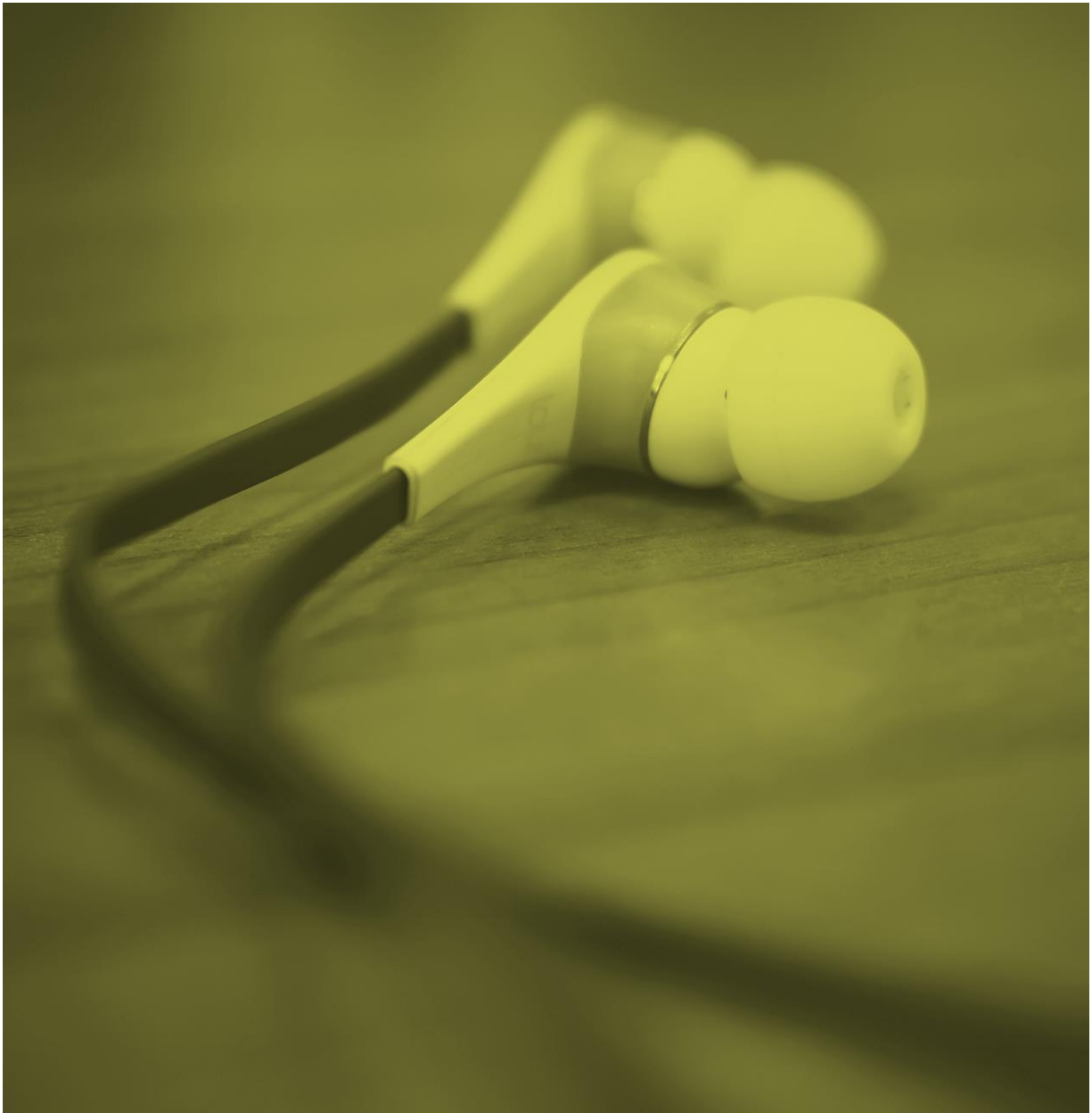
4 Results from the study

4.1 Stream-ripping awareness

The table below shows the proportion of UK adults aware of or using Stream-Ripping services. The NET USED/AWARE row indicates the total number of individuals aware of any of the services:

BASE ALL UK ADULTS AGED 16+ YEARS	Total	Male	Female	16-24	25-34	35-44	45-54	55-64	65+	ABC1	C2DE
Unweighted Base	9112	4357	4755	1339	1566	1385	1449	1301	2072	4703	4409
NET AWARE	57%	61%	53%	79%	70%	65%	58%	49%	30%	62%	50%
Downloader App	11%	13%	10%	23%	18%	15%	9%	5%	2%	12%	11%
Download Site	9%	11%	6%	17%	14%	11%	6%	4%	1%	10%	7%
A stream-ripping site	7%	9%	4%	16%	11%	9%	4%	2%	0	8%	5%
A stream-ripping plugin	5%	7%	4%	10%	10%	8%	4%	2%	1%	7%	4%
A stream-ripping software	4%	6%	2%	8%	9%	6%	3%	1%	0	5%	3%
Only aware of stream-ripping services in general	37%	37%	36%	38%	38%	40%	43%	39%	27%	40%	32%
Not aware of stream-ripping services	36%	32%	40%	14%	22%	26%	36%	46%	62%	32%	41%
Don't know	7%	7%	7%	7%	8%	9%	5%	5%	8%	6%	8%

- 57% of UK adults claimed to be aware of stream-ripping services, with downloader apps (11%) the most common type of service in terms of awareness.
- Demographically, men (61%**) were significantly more likely to claim awareness/use of stream-ripping services when compare to women (53%). A similar split was also seen when looking at social grade, with ABC1s (62%**) significantly more likely than C2DEs (50%) to claim awareness/usage.
- Age also showed a clear trend downwards as age increases, with 79%** of the youngest group claiming awareness/use stream-ripping services compared to just 30% of over 65s. This pattern was consistent across service types.

4.2 Stream-ripping service users

Our research showed that 15% of all UK adults aged 16+ years claimed to have used a stream-ripping service. Figure 1, below shows the demographic splits for this group:

Figure 1: Stream-ripper demographic splits

Male	Female
59%	41%

16-24	25-34	35-44	45-54	55+
33%	28%	17%	11%	8%

ABC1	C2DE
58%	42%
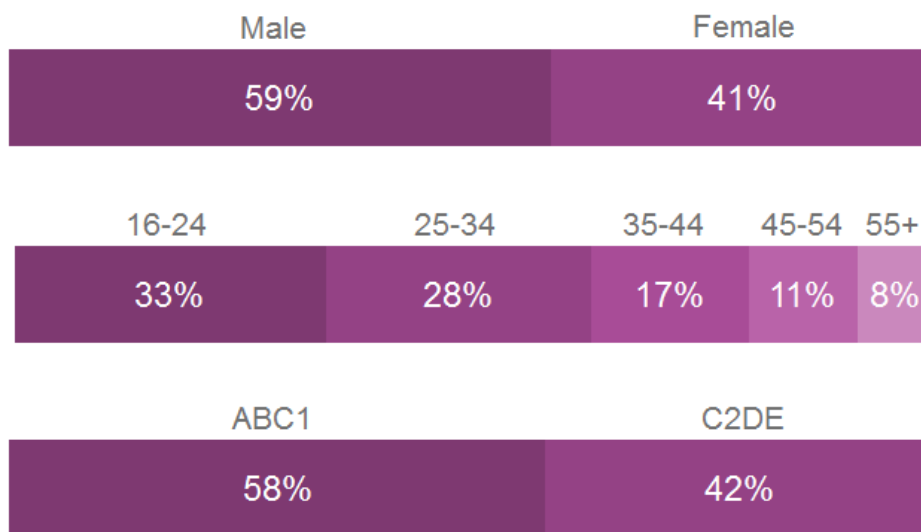
Base: All adults 16+ in GB who have used any stream-ripping service (n=1346).

- Following the pattern we saw for awareness of these services we found that those claiming to use these services were significantly more likely to be male (59%**) than female (41%), ABC1 social grade (58%**) rather than C2DE (42%) and in younger age bands with 61%** of stream-rippers aged between 16-34 years compared to those aged 39%.

*significantly different at a 95% confidence level
**significantly different at a 99% confidence level

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4.3 Types of stream-ripping services used

Out of the five types of stream-ripping services that research was conducted into, download apps were the most common type of stream-ripping services claimed to be used, with over half (54%) of those who have ever used any stream-ripping service having used these.
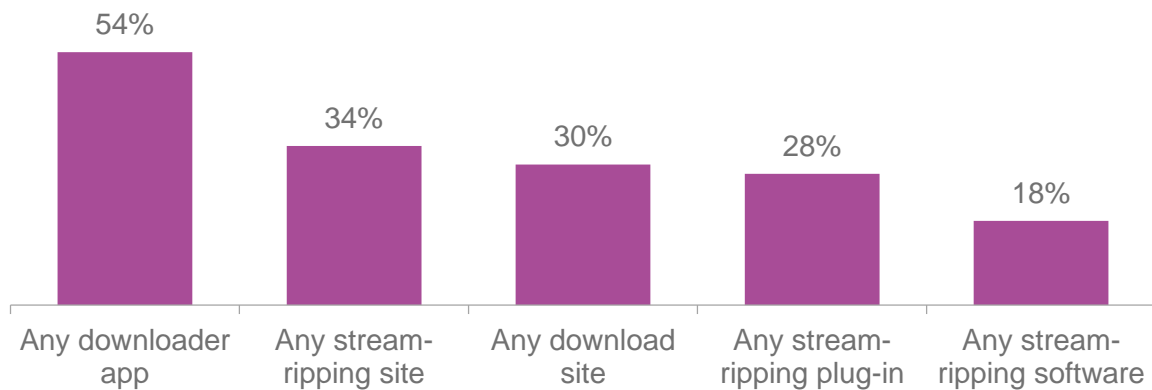

Base: All adults 16+ in GB who have used any stream-ripping service (n=1346).

- As noted above, there is a demographic skew towards males, those aged under 35 and ABC1s and this is clear across all types of services.
- The gender skew is heaviest amongst stream-ripping software users, with over three quarters of users being male (78%**), with only 22% female. Downloader apps see the least pronounced split, though there is still a clear divide.
- Similarly, the skew towards ABC1s is less pronounced for downloader apps than other types of stream-ripping services.
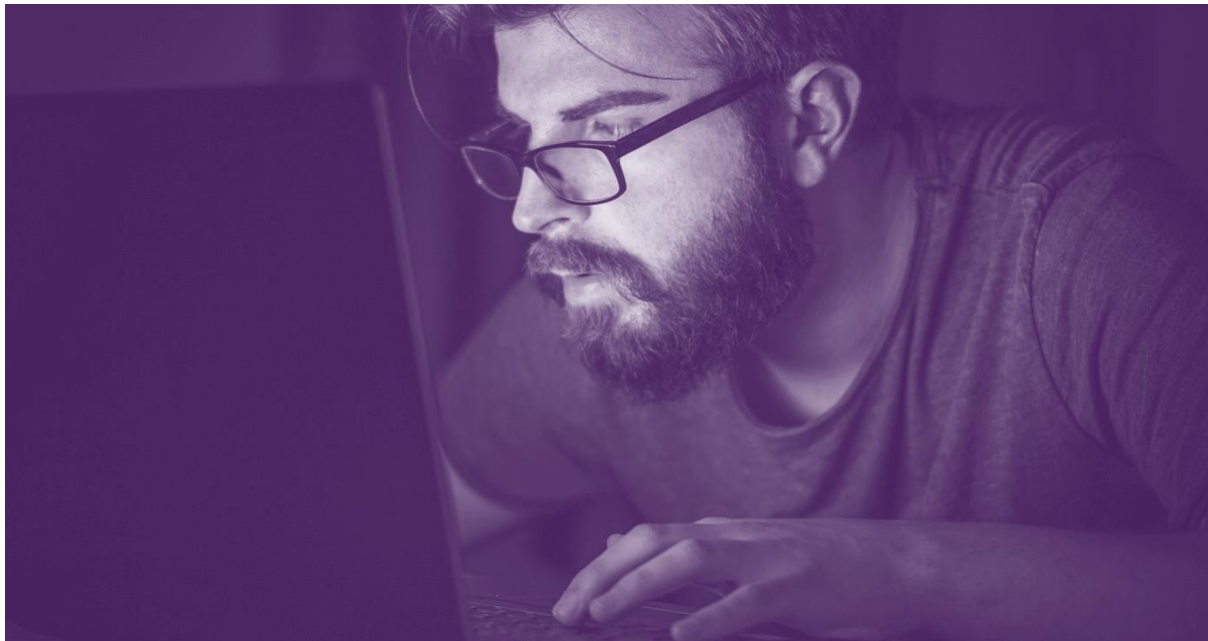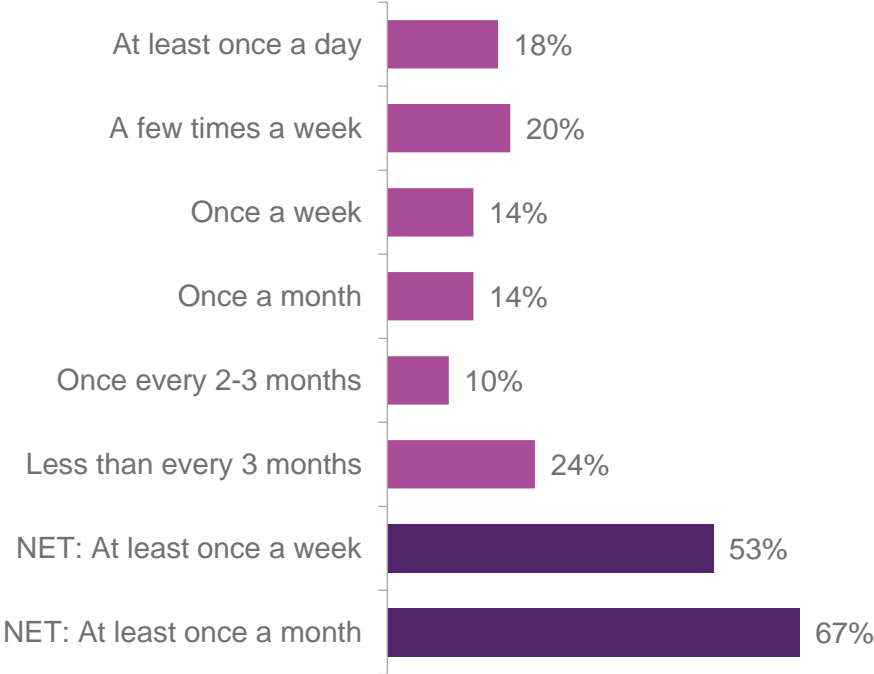
Gender	Downloader app	Stream-ripping sites	Download sites	Stream-ripping plug-ins	Stream-ripping software
Male	56%	65%	67%	63%	78%
Female	44%	35%	33%	37%	22%
Age	Downloader app	Stream-ripping sites	Download sites	Stream-ripping plug-ins	Stream-ripping software
16-24	32%	38%	32%	27%	30%
25-34	26%	25%	30%	32%	32%
35-44	23%	23%	24%	24%	28%
45-54	11%	10%	9%	12%	7%
55-64	5%	3%	3%	4%	2%
65+	4%	1%	2%	2%	1%
Social grade	Downloader app	Stream-ripping sites	Download sites	Stream-ripping plug-ins	Stream-ripping software
ABC1	56%	64%	64%	65%	65%
C2DE	44%	36%	36%	35%	35%

Base: all who have used each type of service (downloader apps n=728 / stream-ripping sites n=441 / download sites n=390 / stream-ripping plug-ins n=367 / stream-ripping software n=236)

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Almost one in five (18%) users of stream-ripping services use these on a daily basis. Over half of users (53%) do so at least once a week, and two thirds (67%) at least once a month.

Category	Percentage
At least once a day	18%
A few times a week	20%
Once a week	14%
Once a month	14%
Once every 2-3 months	10%
Less than every 3 months	24%
NET: At least once a week	53%
NET: At least once a month	67%

Base: All adults 16+ in GB who have used any stream-ripping service (n=1346).

When we look specifically within the different types of stream-ripping service, as follows, we also see a consistent pattern that the most commonly "ever used" services within these category types tend to be used less frequently while those more niche services, once in use, have higher frequency of usage suggesting they are picking up a more ardent user base

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Download apps used

YouTube Downloader is the most commonly used download app (76%), followed by YouTube MP3 Music Downloader (70%).
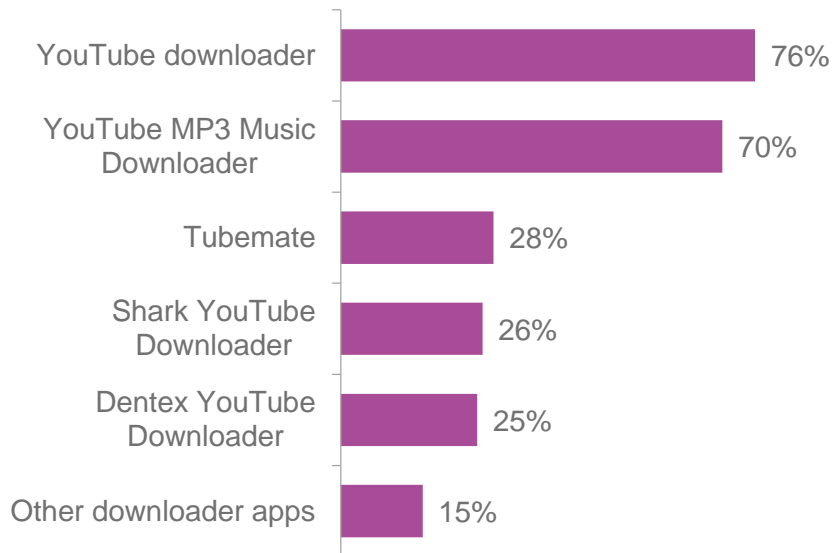
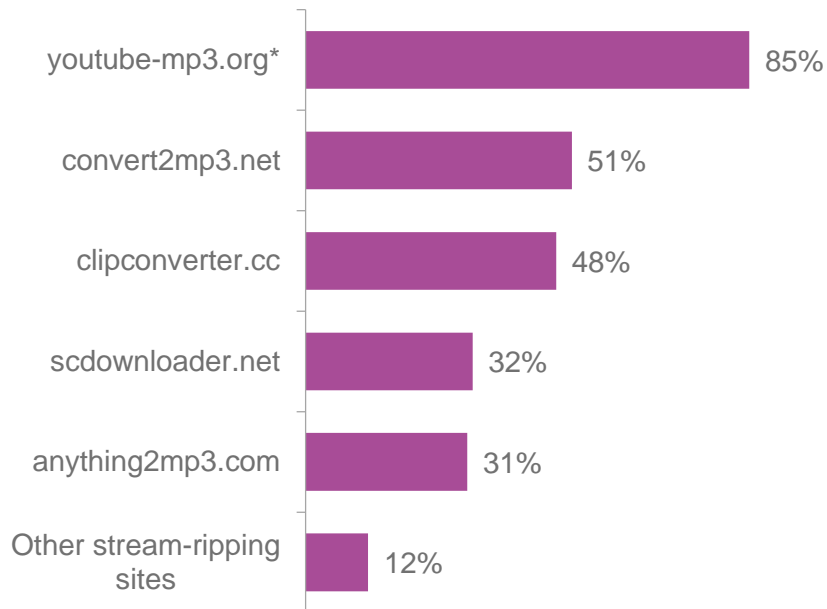*Base: All adults 16+ in GB who have used any download app (n=728).*

- When looking at regular usage of these services, it was found that over half of those who have ever used YouTube Downloader do so at least once a week (53%), whilst just under half of YouTube MP3 Music Downloader users do so (46%).
- Whilst DenTex YouTube Downloader is less commonly used, once in use it is more likely to be used at least once a week than the other services.

Services accessed <ins>at least once a week</ins> (base: those who have used each service)	
YouTube Downloader	53%
YouTube MP3 Music Downloader	46%
Tubemate	61%
Shark YouTube Downloader	61%
Dentex YouTube Downloader	71%

Base: All who have ever used each service (YouTube Downloader n=547 / YouTube MP3 Music Downloader n=501 / Tubemate n=192 / Shark YouTube Downloader n=180 / Dentex YouTube Downloader n=174).

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Stream-ripping sites

YouTube-MP3.org[1] was by far the most commonly used stream-ripping site, followed by convert2mp3.net.

Site	Percentage
youtube-mp3.org*	85%
convert2mp3.net	51%
clipconverter.cc	48%
scdownloader.net	32%
anything2mp3.com	31%
Other stream-ripping sites	12%

Base: all adults 16+ in GB who have used any stream-ripping site (n=441)

Services accessed <u>at least once a week</u> (base: those who have used each service)	
youtube-mp3.org	42%
convert2mp3.net	45%
clipconverter.cc	49%
scdownloader.net	57%
anything2mp3.com	60%

Base: all who have ever used each service (Youtube-mp3.orgyoutube-mp3.org n=372 / convert2mp3.net n=219 / clipconverter.cc n=206 / scdownloader.net n=133 / anything2mp3.com n=131)
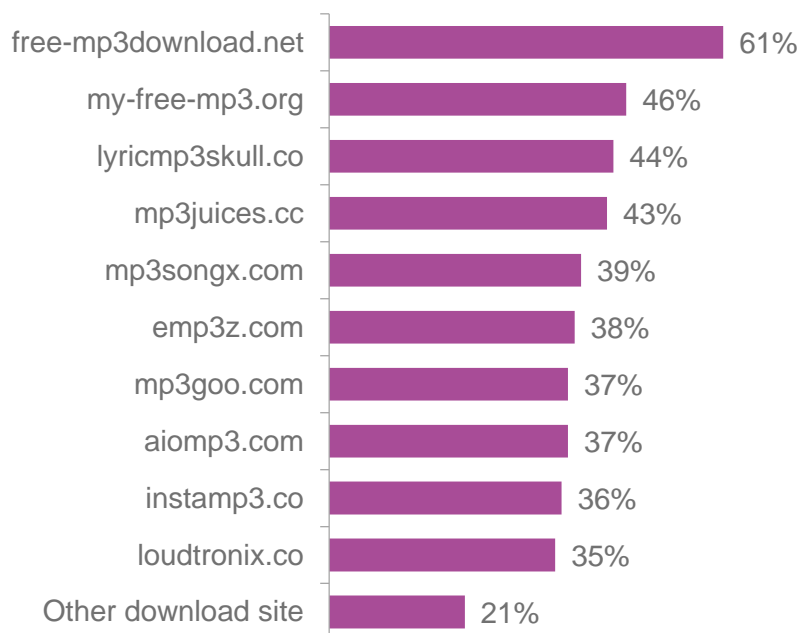
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[1] This research was conducted post the website being subjected to legal action.

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- When looking at regular usage of these services, we see that under half of those who have ever used youtube-mp3.org do so at least once a week (42%).
- Whilst scdownloader.net and anything2mp3.com are less commonly used, once in use it they are more likely to be used at least once a week than other services (over half of users doing so).

Download sites

The most commonly used download site was found to be free-mp3download.net, at 61%.

Site	Percentage
free-mp3download.net	61%
my-free-mp3.org	46%
lyricmp3skull.co	44%
mp3juices.cc	43%
mp3songx.com	39%
emp3z.com	38%
mp3goo.com	37%
aiomp3.com	37%
instamp3.co	36%
loudtronix.co	35%
Other download site	21%

Base: all adults 16+ in GB who have used any download sites (n=390)

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Services accessed <u>at least once a week</u> (base: those who have used each service)	
free-mp3download.net	46%
my-free-mp3.org	44%
lyricsmp3skull.co	50%
mp3juices.cc	53%
mp3songx.com	52%
emp3z.com	56%
mp3goo.com	62%
aiomp3.com	60%
instamp3.co	59%
loudtronix.co	60%

Base: all who have ever used each service (free-mp3download.net n=229 / my-free-mp3.org n=187 / lyricsmp3skull.co n=171 / mp3juices.cc n=161 / mp3songx.com n=157 / emp3z.com n=143 / mp3goo.com n=137 / aiomp3.com n=137 / instamp3.co n=132 / loudtronix.co n=129)

- Following the trend of other services, those services more commonly accessed (free-mp3download.net, my-free-mp3.org) tend to be less likely accessed at least once a week by their users. Similarly, those services less commonly used tend to be accessed at least once a week by users.

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Stream-ripping plug-ins

The most commonly used stream-ripping plug-ins are YouTube to MP3 (79%) and YouTube Downloader (78%).
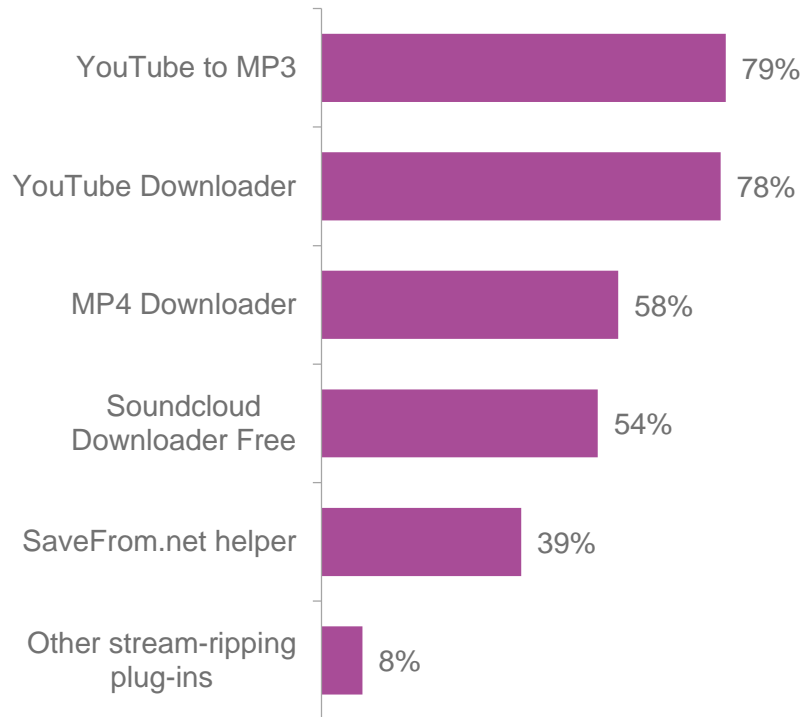
Base: all adults 16+ in GB who have used any stream-ripping plug-in (n=367)

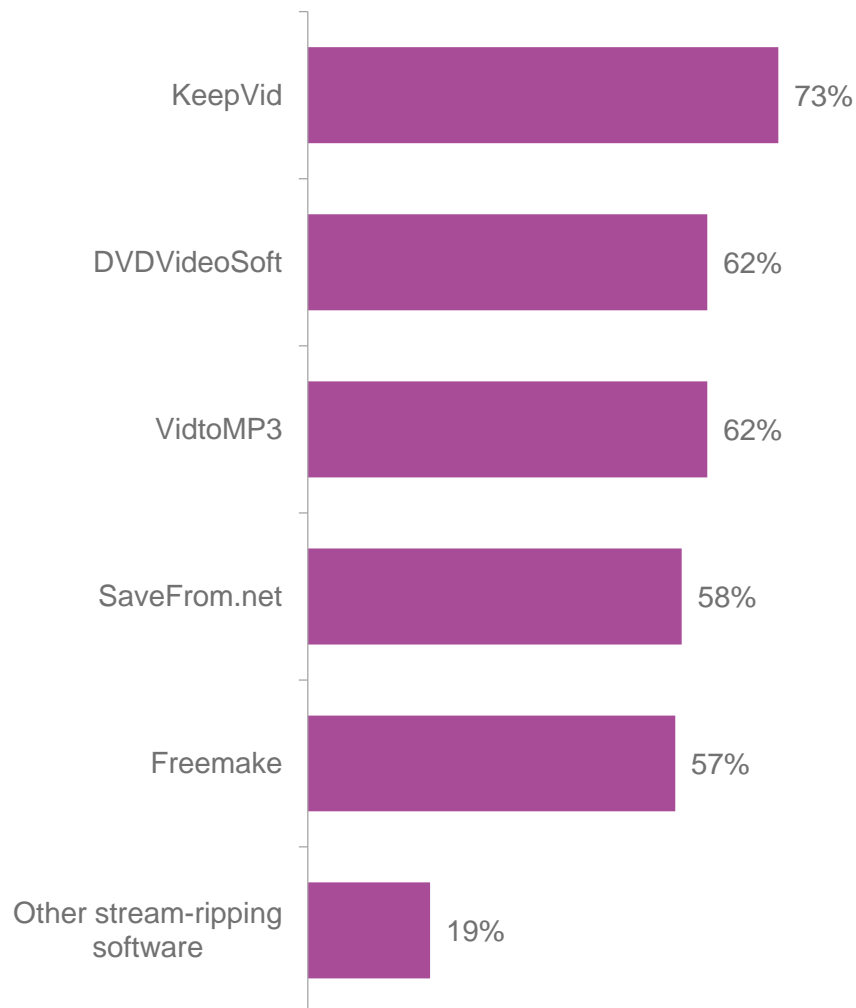| Services accessed <u>at least once a week</u> (base: those who have used each service)	
YouTube to MP3	47%
YouTube Downloader	49%
MP4 Downloader	52%
Soundcloud Downloader Free	56%
SaveFrom.net Helper	64%
Other stream-ripping plug-ins	67%

Base: all who have ever used each service (YouTube to MP3 n=289 / YouTube Downloader n=284 / MP4 Downloader n=209 / Soundcloud Downloader Free n=194 / SaveFrom.net helper n=140)

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- When looking at regular usage of these services, we see that under half of those who have ever used YouTube MP3 do so at least once a week (47%).[2]
- Whilst SaveFrom.net Helper and other stream-ripping plug ins are less commonly used, once in use they are more likely to be used at least once a week.

Stream-ripping software

KeepVid leads the way as the most commonly used stream-ripping software (73%). That said, each service asked about in the research saw over half of those who claimed to use stream-ripping software stating they had used it.

KeepVid	73%
DVDVideoSoft	62%
VidtoMP3	62%
SaveFrom.net	58%
Freemake	57%
Other stream-ripping software	19%

Base: all adults 16+ in GB who have used any stream-ripping software (n=236)

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Services accessed <u>at least once a week</u> (base: those who have used each service)	
KeepVid	50%
DVDVideoSoft	55%
VidtoMP3	57%
SaveFrom.net	60%
Freemake	55%

Base: all who have ever used each service (KeepVid n=170 / DVDVideoSoft n=144 / VidtoMP3 n=141 / SaveFrom.net n=133 / Freemake.com n=129)

- When looking at the services used at least once a week, we can see there is less of a gap between the percentage of users who do so amongst the more commonly accessed services and less commonly accessed.
- That said, KeepVid is the most commonly used service yet has the lowest percentage of users who do so on a weekly basis.

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4.4 How stream-ripping services are accessed

The most popular means of accessing any stream-ripping service was through a desktop or laptop computer, with over three quarters (78%) of respondents claiming to use these devices to do so.

	Computer (desktop or laptop)	Mobile device (e.g. smart-phone or tablet)	Other device	Mean number of devices used
ANY stream-ripping service	**78%**	**52%**	**33%**	**1.63**
Downloader apps	70%	52%	26%	1.48
Stream-ripping sites	85%	46%	30%	1.61
Download sites	73%	54%	38%	1.65
Stream-ripping plug-ins	83%	52%	36%	1.71
Stream-ripping software	86%	58%	44%	1.88

Base: all adults 16+ in the UK who have used any stream-ripping service (n=1346) / users of download apps (n=728) / users of stream-ripping sites (n=441) / users of downloader sites (n=390) / users of stream-ripping plug-ins (n-367) / users of stream-ripping software (n=236).

- Stream-ripping software is the type of service most likely to be used on a desktop and laptop computer, whilst stream-ripping sites and stream-ripping plug-ins follow closely behind.
- The mean number of device types used rises the less common the type of service.

4.5 Attitudes towards stream-ripping services

Attitudes towards the rights and permissions of stream-ripping services

A quarter (24%) of stream-rippers believe that such services have the necessary rights and permissions to allow them to download or rip content in this way, though many seem confused about the exact legality of what they are doing.

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BASE ALL UK STREAM-RIPPERS AGED 16+ YEARS	Total	Male	Female	16-24	25-34	35-44	45-54	55+	ABC1	C2DE
Unweighted Base	1346	774	572	441	390	241	135	139	727	619
Services such as these will have the necessary rights and permissions to allow downloads or ripping of content in this way	24%	23%	24%	21%	24%	29%	18%	27%	23%	25%
Sites such as these do not have the necessary rights and permissions to allow you to download or rip content in this way	18%	20%	15%	22%	15%	17%	16%	17%	20%	15%
Services such as these do not need the express permission of the content owners once it is openly available on the internet	16%	16%	16%	14%	22%	17%	14%	3%	17%	16%
Services such as these do not need the express permission of the content owners as the music is being sourced from official sites	11%	12%	10%	12%	12%	11%	8%	6%	12%	10%
Services such as these do not need the express permission of the content owners provided the content is for my own personal use	8%	8%	7%	8%	8%	6%	9%	10%	8%	8%
None of these	8%	8%	8%	8%	6%	7%	9%	11%	8%	7%
Don't Know	16%	12%	21%	15%	12%	13%	26%	25%	13%	20%

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- Men (20%*) are significantly more likely than women (15%) to definitely say that *"Sites such as these do not have the necessary rights and permissions to allow you to download or rip content in this way"*. Similarly, those aged 16-24 (22%) are more likely to agree with this than those in other age groups (significantly more so than those aged 25-34*). ABC1s (20%*) are also significantly more likely than C2DEs (15%) to agree.

Looking at the different types of stream-ripping service users (as shown in table below) we see that those using stream-ripping software (30%) are the most likely to say these types of service do not have the relevant permissions, significantly more likely than stream-ripping sites (21%**).

- Over a quarter of those using stream-ripping software (30%), downloader sites (28%) and stream-ripping plug-ins (27%) believed that the services they were using had the necessary rights and permissions to download content in this way.

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BASE ALL UK STREAM-RIPPERS AGED 16+ YEARS	Total	Stream-ripping software	Stream-ripping plug-ins	Stream-ripping sites	Download er sites	Downloade r apps
Unweighted Base	1346	236	367	441	390	728
Services such as these will have the necessary rights and permissions to allow downloads or ripping of content in this way	24%	30%	27%	21%	28%	25%
Sites such as these do not have the necessary rights and permissions to allow you to download or rip content in this way	18%	18%	15%	22%	17%	16%
Services such as these do not need the express permission of the content owners once it is openly available on the internet	16%	24%	21%	17%	21%	15%
Services such as these do not need the express permission of the content owners as the music is being sourced from official sites	11%	9%	10%	10%	10%	11%
Services such as these do not need the express permission of the content owners provided the content is for my own personal use	8%	7%	9%	7%	7%	8%
None of these	8%	6%	6%	6%	5%	9%
Don't Know	16%	6%	12%	16%	13%	16%

In terms of the "moral" perspective when looking at stream-ripping we found a quarter of stream-rippers agreed it was wrong to download content through stream-ripping services without the creators\artists permission, as shown in the table below looking at stream-rippers views on this area.

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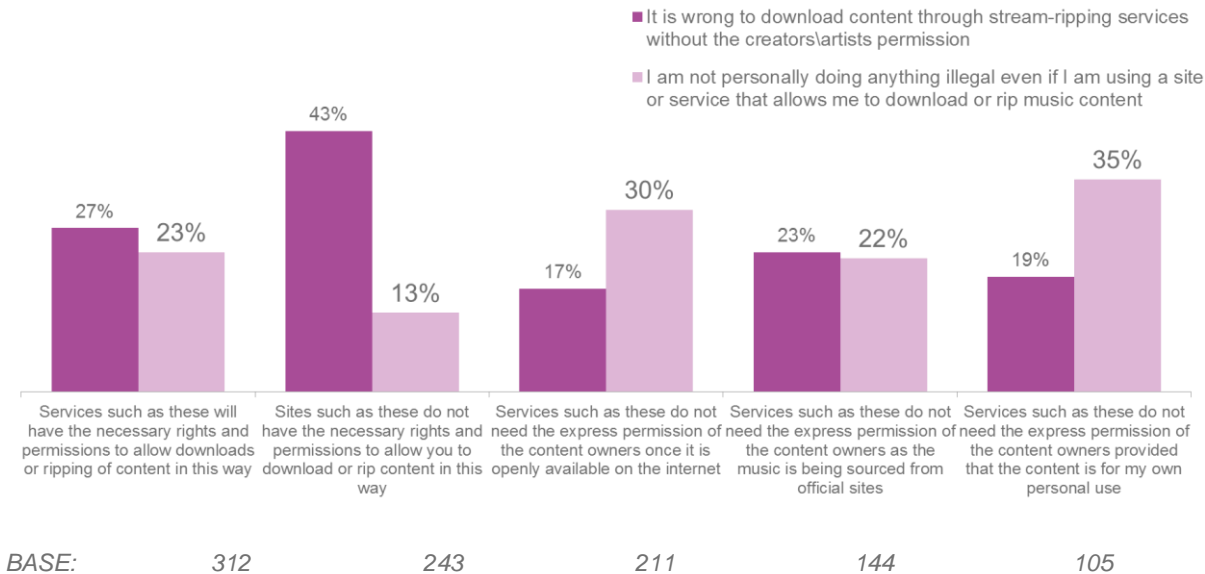| BASE ALL UK STREAM-RIPPERS AGED 16+ YEARS	Total	Male	Female	16-24	25-34	35-44	45-54	55+	ABC1	C2DE
Unweighted Base	1346	774	572	441	390	241	135	139	727	619
It is wrong to download content through stream-ripping services without the creators/artists permission	25%	27%	23%	26%	24%	24%	28%	27%	29%	20%
I find it difficult to find the content I download or rip through legal sources	20%	21%	18%	19%	22%	23%	20%	9%	20%	20%
I am not personally doing anything illegal even if I am using a site or service that allows me to download or rip music content	20%	21%	20%	21%	19%	23%	18%	18%	20%	20%
I'd be less likely to use services that allow me to download or rip music like this if I thought I might get prosecuted by the authorities	23%	23%	24%	27%	21%	26%	20%	20%	23%	24%
I'd be less likely to use services that allow me to download or rip music like this if my friends did not use them as well	12%	12%	11%	12%	14%	13%	8%	5%	12%	11%
I like being able to share content online through sites and services like this	16%	15%	16%	12%	19%	19%	16%	10%	15%	17%
None of these	9%	8%	10%	7%	9%	9%	10%	12%	10%	7%
Don't know	9%	8%	11%	9%	6%	7%	14%	19%	6%	13%

- The biggest demographic difference in terms of agreement that "It is wrong to download content through stream-ripping services without the creators/artists permission" appears to be between social grades, ABC1s 29%** compared to 20% of C2DEs.

- Comparing the different types of stream-ripping service users there was little difference in agreement that it is wrong to download content without creator/artist permission. (Downloader Apps 26%, Downloader sites 26%, stream-ripping sites 26%, stream-ripping plug-ins 24% and stream-ripping software 23%).

- In terms of sharing content we saw that it was actually the 25-44yrs age band, (19%) that were most likely to agree that they like to use these types of service to share. At 25%* we also saw that those using stream-ripping software were most likely to agree with this statement on sharing, compared to 18% for downloader apps and stream-ripping sites groups.
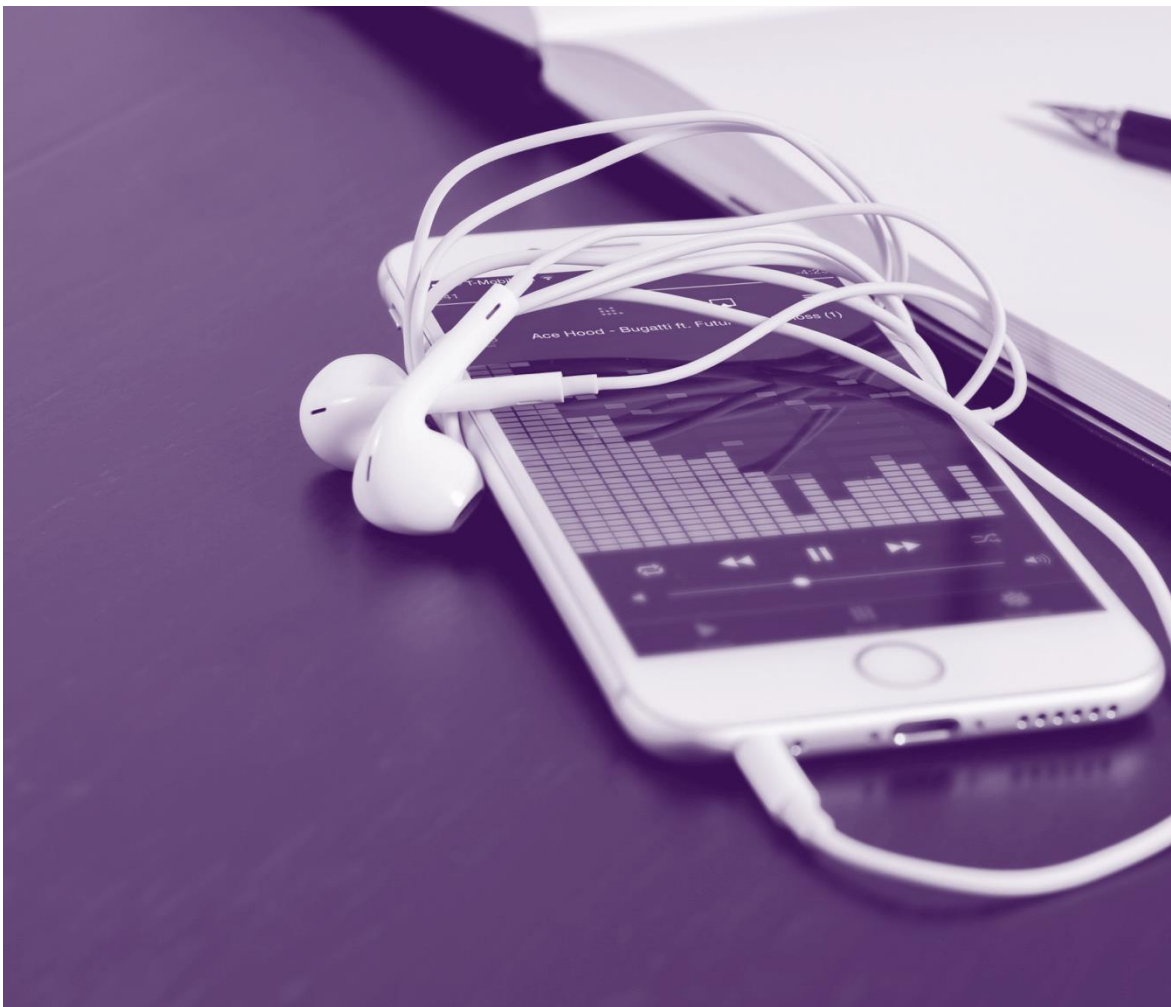
In the chart below we compare the % agreement with the statements around it being wrong to download through stream-ripping sites and the view they are not personally doing anything wrong for the different "rights understanding" groups. This shows that those who say that stream-ripping services do not have the necessary permissions are more likely to agree that "it is wrong to download content through stream-ripping services" (43%) and less likely to agree "they are not doing anything personally wrong" (13%). This both highlights that many of those who are unsure about the legality of what they are doing are also unlikely to see this as immoral or illegal behaviour. It also indicates that while those who do see it as illegal are above average for seeing it as morally wrong the majority of this group (57%) still do not see it that way.

BASE: 312   243   211   144   105

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Reasons for using stream-ripping services

Already owning the music in another format (31%) was the main reason for people to use stream-ripping services, followed by wanting to access the music when they were offline (26%) or on the move (25%).

BASE ALL UK STREAM-RIPPERS AGED 16+ YEARS	Total	Male	Female	16-24	25-34	35-44	45-54	55+	ABC1	C2DE
Unweighted Base	1346	774	572	441	390	241	135	139	727	619
I already owned the music in another format	31%	36%	24%	28%	34%	32%	30%	31%	33%	29%
I want to listen to music when I'm offline	26%	23%	29%	30%	24%	24%	25%	19%	26%	25%
I want to listen to music when I'm on the move	25%	22%	29%	30%	22%	25%	23%	18%	26%	25%
I can't afford to pay for a download	21%	20%	23%	27%	23%	16%	21%	8%	20%	24%
I think official legal downloads are too expensive	20%	19%	22%	23%	21%	23%	13%	13%	21%	20%
The files I want to download are not available on official download stores	19%	20%	18%	19%	20%	21%	17%	15%	20%	18%
I want to listen to music without ads	19%	17%	21%	24%	19%	12%	14%	21%	19%	18%
I've already paid to see the band\artist in concert	13%	15%	11%	13%	16%	15%	9%	6%	15%	10%
I don't think I should have to pay to download music	13%	11%	16%	13%	15%	14%	9%	6%	11%	15%

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BASE ALL UK STREAM-RIPPERS AGED 16+ YEARS	Total	Male	Female	16-24	25-34	35-44	45-54	55+	ABC1	C2DE
It saves me using my mobile data allowance to stream content	13%	11%	15%	19%	11%	11%	8%	5%	13%	13%
The industry makes too much money	12%	12%	12%	10%	12%	15%	10%	8%	13%	10%
I can't afford to pay for a subscription to a streaming service (such as Spotify)	12%	10%	14%	14%	10%	11%	12%	10%	13%	10%
I think official streaming services are too expensive	11%	10%	12%	10%	8%	13%	14%	14%	11%	10%
I already spend enough on content	10%	11%	9%	9%	12%	13%	8%	4%	11%	9%
I don't like streaming sites	6%	6%	5%	7%	5%	5%	7%	7%	6%	6%
No one suffers	3%	3%	3%	3%	2%	3%	3%	1%	3%	3%
Other reasons	4%	4%	4%	3%	4%	5%	4%	7%	5%	3%
I have only used these services to download or rip content other than music	3%	3%	3%	1%	3%	3%	6%	9%	4%	2%
None of these	6%	6%	5%	6%	4%	5%	7%	10%	6%	5%

- Men (36%**) were significantly more likely than women (24%) to say they already owned the music in another format (thus the demographic group most likely to say this).

- 16-24s coming out as the highest rating group on agreement with reasons around wanting to listen offline at 30%*, significantly higher than those aged 55+ (19%). They also came out on top for listening to music on the move (30%), significantly higher than those aged 25-34 (22%**) and 55+ (18%**).

- 16-24s also came out on top for financial reasons, such as not being able to afford downloads (27%), significantly higher than both 35-44s (16%**) and 55+ (8%**), as well as for thinking official legal downloads are overpriced (23%), significantly higher than those aged 45-54 (13%*) and 55+ (13%*).
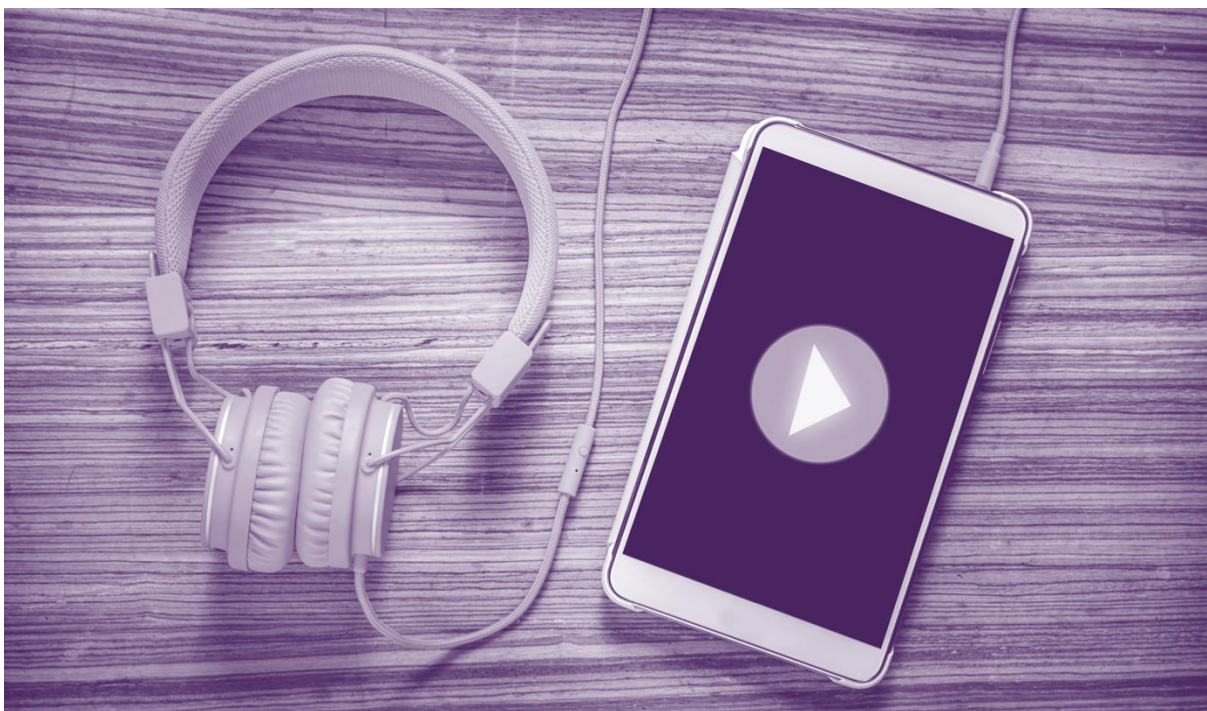
4.6 How music is listened to by stream-rippers

Devices used to listen to music

This research also sought to contextualise the stream-ripping activities within a broader understanding of how music is consumed. The below charts show the percentage of those who use each device to listen to music:
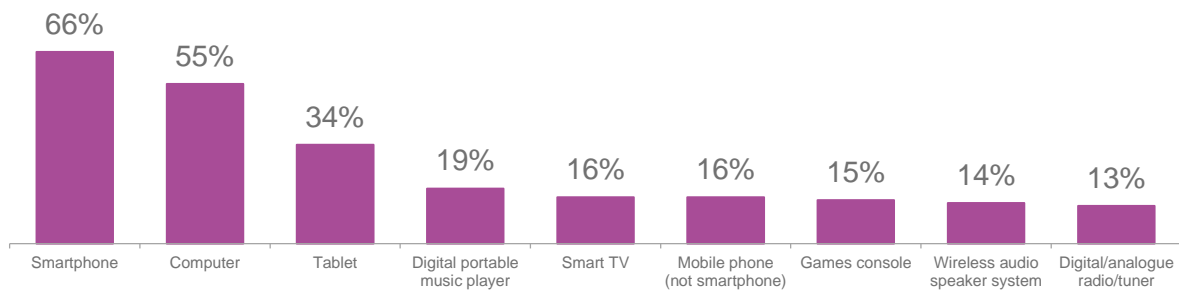
Base: all adults 16+ in GB who have used any stream-ripping service (n=1346)

- Smartphones are the most commonly used device to listen to music on, followed by a computer.

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Gender	Smartphone	Computer (desktop or laptop)	Tablet
Male	65%	58%	33%
Female	68%	50%	35%

Age	Smartphone	Computer (desktop or laptop)	Tablet
16-24	72%	55%	32%
25-34	67%	50%	29%
35-44	68%	55%	35%
45-54	65%	55%	45%
55-64	49%	74%	38%
65+	25%	59%	32%

Social grade	Smartphone	Computer (desktop or laptop)	Tablet
ABC1	69%	59%	35%
C2DE	63%	49%	32%

Base: all adults 16+ in GB who have used any stream-ripping service (n=1346)

- There is little difference between genders, though women are slightly more likely than men to ever use their smartphones to listen to music (68% compared to 65%).
- Those aged 16-24 are most likely to use smartphones to ever listen to music, with nearly three quarters doing so (72%), significantly more likely than those aged 55-64 (49%**) and 65+ (25%**). That said, those aged 65+ are more likely than the younger age groups to use a computer to listen to music, with the exception of those aged 55-64 who are even more so likely.
- ABC1s are more likely to use any of the devices to listen to music than C2DEs, with 69%* compared to 63% respectively for smartphones and 59%* compared to 49% respectively.

*significantly different at a 95% confidence level
**significantly different at a 99% confidence level

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Services used to listen to music (at least once a week)

Service	%
YouTube	71%
iTunes	38%
Facebook	38%
TV music channels	37%
BBC iPlayer	35%
Spotify (ad funded)	35%
Soundcloud (free)	31%
Apple Music	30%
Spotify (paid subscription)	30%
Google Play Music	29%
Radioplayer	26%
Vevo	26%
Amazon Prime Music	26%

Service	%
Amazon Music Store	25%
Podcasts	25%
LastFM	23%
Artist's own website	23%
Deezer (ad funded)	22%
E Music	21%
TuneIn	21%
Vimeo	21%
Deezer (paid subscription)	21%
Bandcamp	20%
Soundcloud (pro/unlimited)	20%
MySpace	19%
Napster	19%

Base: all adults 16+ in GB who have used any stream-ripping service (n=1346)

- YouTube by far leads the general services used to access music content at least once a week by stream-rippers.

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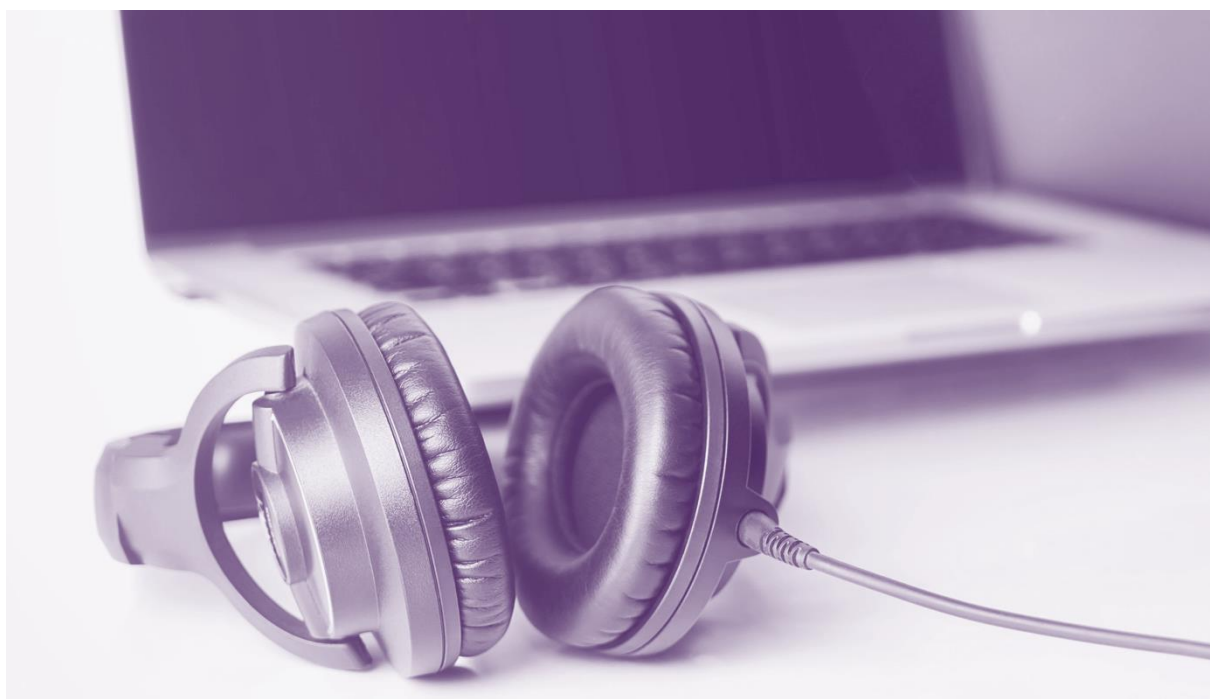
5 Technical appendix

5.1 Data collection methodology

The research universe for this study was all adults aged 16+ in the UK. However, the focus of the study (and thus the majority of the questions) was amongst the UK online population. Computer-assisted web interviewing (CAWI) and face-to-face computer-assisted personal interviewing (CAPI) was employed for this research.

The online element

The online element of this research was conducted via Kantar Lightspeed's online panel to undertake a dedicated nationally representative (of the internet population) Omnibus-type approach. Respondents were invited to take part via email, and demographic quota targets (sex, age, working status and region) were set to ensure the end sample profile is representative of the UK internet population.

Due to the nature of the research subject and audience that we needed to speak to, there were strong benefits for adopting online computer-assisted web interviewing (CAWI). These benefits are as follows:

- it was the most suitable / relevant methodology for the subject matter
- it contains a large incidence of high frequency internet users; key to qualification for any questions on illegal online behaviour and thus providing a more robust sample / high representation with which to profile and cut the data. The sample was then down-weighted in order to provide the true proportion amongst all adults.
- it was seemingly the most likely to generate honesty, due to being entirely self-completion (i.e. removing the interviewer conditioning effects)

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

- reduce coverage of those aged 65+ significantly
- provide only a handful of low frequency internet users, who are less likely to participate in the kind of behaviour covered, but were again necessary for a representative sample if looking to accurately size market behaviour

Therefore, a single methodology approach to the project would not have been sufficient, and a mixed one was more likely to generate accurate and representative results. The above CAWI online sample was therefore supplemented by a CAPI methodology.

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The face-to-face element

The CAPI element of this research was conducted using the Kantar TNS Omnibus service. This service offers the largest weekly face-to-face consumer survey in the United Kingdom. Each survey interviews approximately 2,060 adults aged 16+ and runs twice per week, offering c.4,120 adult interviews per week. Again, quota targets (sex, age, working status and presence of children) were set during interviewing to ensure representivity. This makes it a high quality and cost-effective research solution for those who want to access a representative sample or specific groups.

Self-completion was offered for all sensitive questions. We know from experience that this method drives more honest responses, and it also maintains some consistency with online research, which was 100% self-completion. There were some concerns that older age groups might prefer to be asked the questions due to being less technically proficient on the whole, however it would actually only be those who claim to partake in stream-ripping behaviours that would be required to self-complete. We therefore believe that if they are proficient enough to use stream-ripping services via a computer, they should have little trouble in using the CAPI machine with an interviewer's guidance.

5.2 The sample

Total sample

Methodology (all Omnibus)	Description	Sample size
Online (CAWI)	16-64 year olds who use the internet at least once a day	4206
Face-to-face (CAPI)	All adults 16+	4906
Total	All 16+ in the UK	9112

Stream-rippers sample

Methodology (all Omnibus)	Description	Sample size
Online (CAWI)	16 – 64 year olds who use the internet at least once a day and have ever used any stream-ripping service	1047
Face-to-face (CAPI)	All adults aged 16+ who have ever used any stream-ripping service	299
Total	All 16+ in the UK who have ever used any stream-ripping service	1346

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Data was then weighted based on the standard Omnibus nationally representative profile (gender, age, social grade and region) as well as internet usage (based on latest Ofcom CMR figures for 2016).

Sample selection

CAWI interviews: The sample was 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 panellists were invited via email to take part in the survey, and demographic quota targets (sex, age, working status and region) were set to ensure that the end sample profile was representative of the UK internet population.

CAPI interviews: Our face-to-face omnibus uses a comprehensive address-based system using PAF and CD-Rom, cross-referenced to the Census data. For each wave, 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 were conducted via the field team and in accordance with strict quality control procedures. Quotas (by sex, age, working status and presence of children) were set during interviewing to ensure representivity, while any sample profile imbalances are corrected at the analysis stage through weighting. Further technical details can be provided on request.

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About Kantar Media

Kantar Media is a global leader in media intelligence, providing clients with the data they need to make informed decisions on all aspects of media measurement, monitoring and selection. Part of Kantar, the data investment management arm of WPP, Kantar Media provides the most comprehensive and accurate intelligence on media consumption, performance and value. For further information, please visit us at **WWW.KANTARMEDIA.COM**

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