

The Leading Question

Essential Music, Media & Technology Research

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Filesharing music amongst UK teens down by a third

**** New research shows digital piracy threat is changing dramatically ****

UK Music fans are turning their backs on regular file-sharing in favour of streaming and other ways of sharing music, especially amongst teens, according to the latest survey by The Leading Question, the specialist media and technology research agency.

Following the recent Digital Britain Report which set out the UK Government's stance on how to curb file-sharing, the annual survey of more than 1000 music fans from The Leading Question, in conjunction with Music Ally, shows that the nature of the file-sharing threat is already changing.

Overall levels of regular file-sharing music are down, particularly amongst UK teenagers:

- The overall percentage of music fans file-sharing regularly (i.e. every month) has gone down since the last national survey. In December 2007 22% regularly file-shared tracks, but in January 2009 this was down to 17%, a comparative drop of nearly a quarter.
- The biggest drop in those regularly file-sharing occurred amongst 14-18 year olds. (In December 2007 42% of 14-18s were filesharing at least once a month. In January 2009 this was down to just 26%)

This is despite the fact that the percentage of music fans who have ever file-shared has, unsurprisingly, increased, rising from 28% in December 2007 to 31% in January 2009. The move to streaming - e.g. YouTube, MySpace and Spotify - is clear with the research showing that many teens (65%) are streaming music regularly (i.e. each month). Nearly twice as many 14-18s (31%) listen to streamed music on their computer every day compared to music fans overall (18%). More fans are regularly sharing burned CDs and bluetoothing tracks to each other than file-sharing tracks.

There are now more UK music fans regularly buying single track downloads (19%) than file-sharing single tracks (17%) every month, though the percentage of fans sharing albums regularly (13%) remains higher than those purchasing digital albums (10%).

The Leading Question research also shows the comparative volume of pirated tracks to legally purchased tracks has halved since their last survey just over 12 months ago. In December 2007 the ratio of tracks obtained from file-sharing compared to tracks obtained as legal purchases on an ongoing basis was 4:1. In January 2009 the ratio had narrowed to just 2:1.

By the time some of the anti-piracy measures proposed in the Digital Britain report actually come into effect, the nature of the piracy threat is likely to have changed dramatically.

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“File sharing is a moving target, so industry and Government policies need to recognise this,” says Music Ally CEO Paul Brindley. “It’s already being somewhat displaced by other means of accessing music for free. Some are licensed, many are not licensed and some involve a bit of both. Kids find services like YouTube much more convenient for checking out new music than filesharing. But even YouTube can become a source of piracy with some kids ripping YouTube videos and turning them into free MP3 downloads.”

Tim Walker, CEO of The Leading Question, adds: “Ultimately we believe that the best way to beat piracy is to create great new licensed services that are easier and more fun to use, whether that’s an unlimited streaming service like Spotify or a service like the one recently announced by Virgin which aims to offer unlimited MP3 downloads as well as unlimited streams.”

Notes for Editors

The Leading Question/Music Ally Speakerbox survey is the biggest face to face survey of UK music fans. The syndicated, proprietary project involves 1,000 face to face interviews with music fans aged 14-64 and a series of in depth focus groups which took place throughout the UK. The survey base excludes non broadband users and those with no mobile phones. Clients include Universal Music, Tesco, Orange and BBC. For more information, see www.TheLeadingQuestion.com and www.MusicAlly.com.

Contacts

Paul Brindley
T: +44 (0)7956 579642
E: paul.brindley@musically.com

Tim Walker
T: +44 (0)7769 894944
E: tim@theleadingquestion.com

www.theleadingquestion.com
www.musically.com

[1-5 Exchange Court,](#)
[Covent Garden,](#)
[London, WC2R 0PQ,](#)
[U.K.](#)

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