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Intellectual Property Office

WIPO
Online Copyright Infringement Tracker 2017

Research for the Intellectual Property Office

September 2017

Research objectives

What the research set out to achieve

To measure online copyright infringement levels (alongside lawful activity) amongst UK consumers and monitor changes over time

To gain a deeper understanding of attitudes towards copyright infringement

To monitor awareness and effectiveness of educational campaigns

To assess awareness and attitudes towards availability of lawful alternatives

To measure spend on recorded and digital media to analyse potential impact of illegal file-sharing on purchase of related content

To explore willingness to pay and optimum pricing for different content types

Three essentials when tracking online copyright infringement

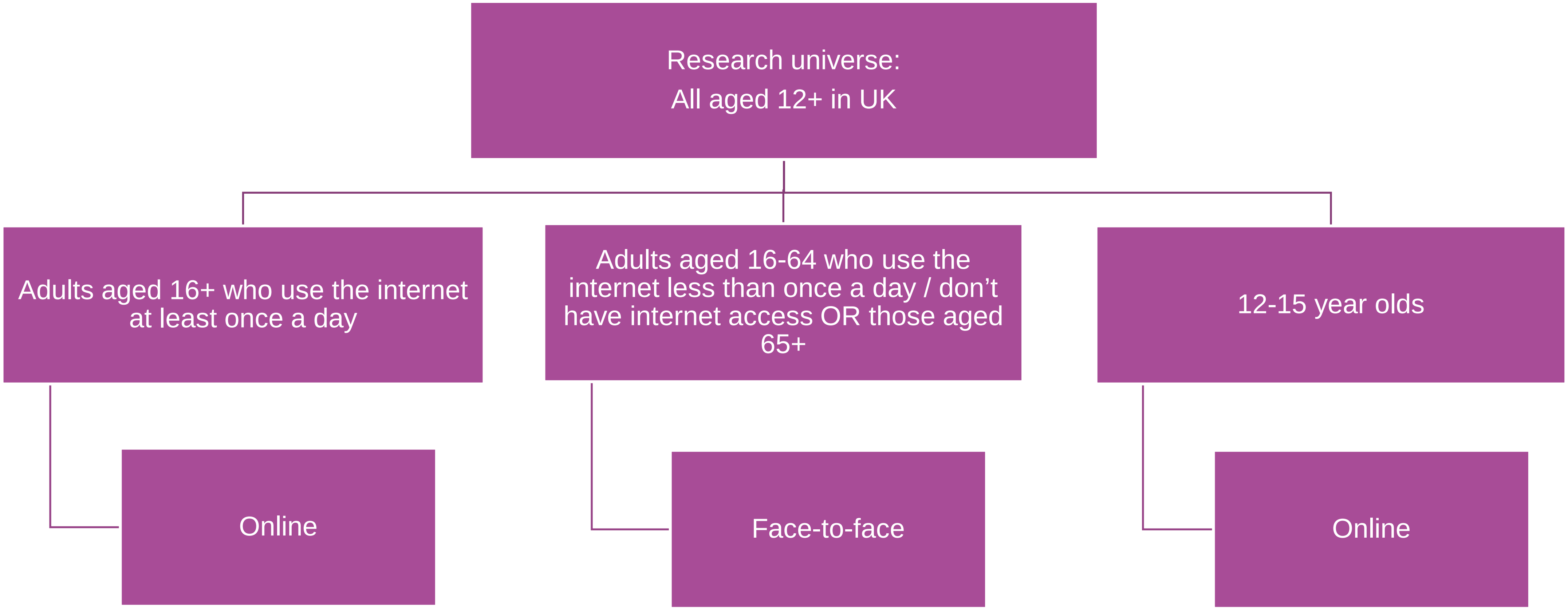
Representivity

Consistency

Honesty

Representivity

A mixed method approach



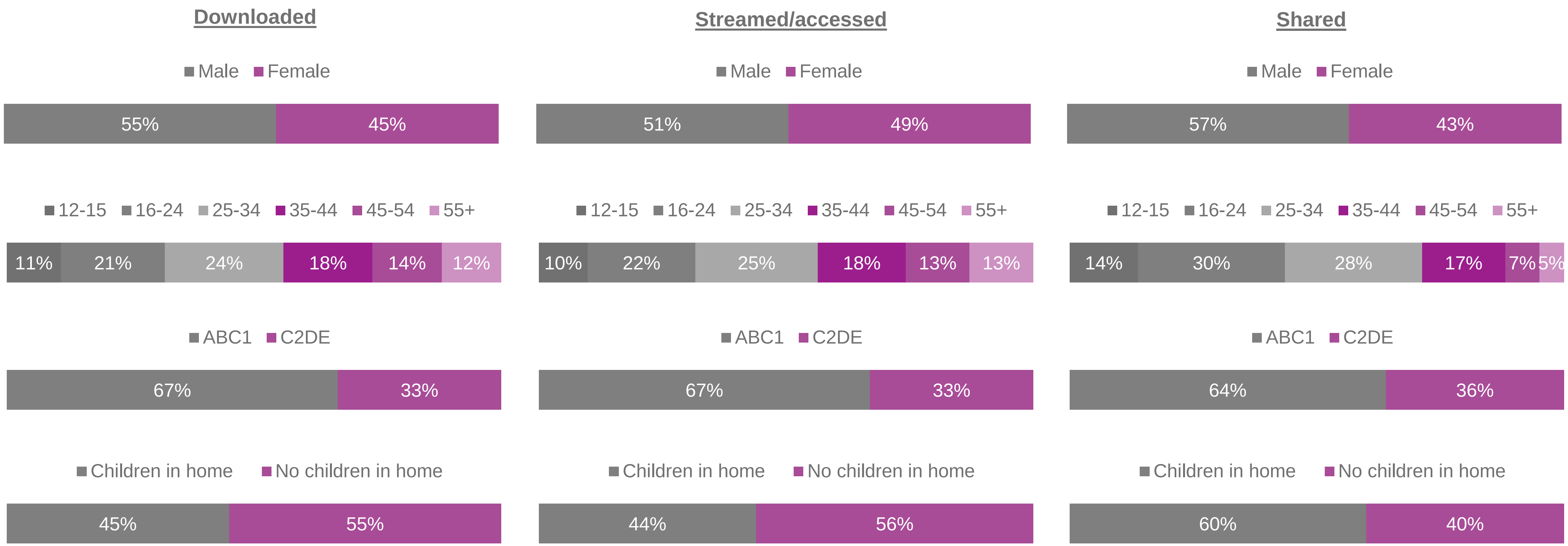
Representivity

Sample details

Methodology (all Omnibus)	Description	Sample size
Online (CAWI) adults	16 – 64 year olds who use the internet at least once a day	**2,869**
Face-to-face (CAPI) adults	16 – 64 year olds who use the internet less than once a day OR 16 – 64 year olds without internet access OR 65+ year olds	**1,360**
Online (CAWI) 12 – 15 year olds	All 12 – 15 year olds with internet access	**1,038**
Total	All 12+ year olds in UK	**5,267**

Representative data means we know that we are profiling the whole of the market

Profile comparison of those who download, stream/access or share content



Q.1A. Have you downloaded / streamed / shared any of the following through the internet in the last 3 months? Base: All aged 12+ who have downloaded or streamed/accessed or shared a file in the last 3 months (Downloaded n=2010 / Streamed/accessed n=2740 / Shared n=500)

Consistency

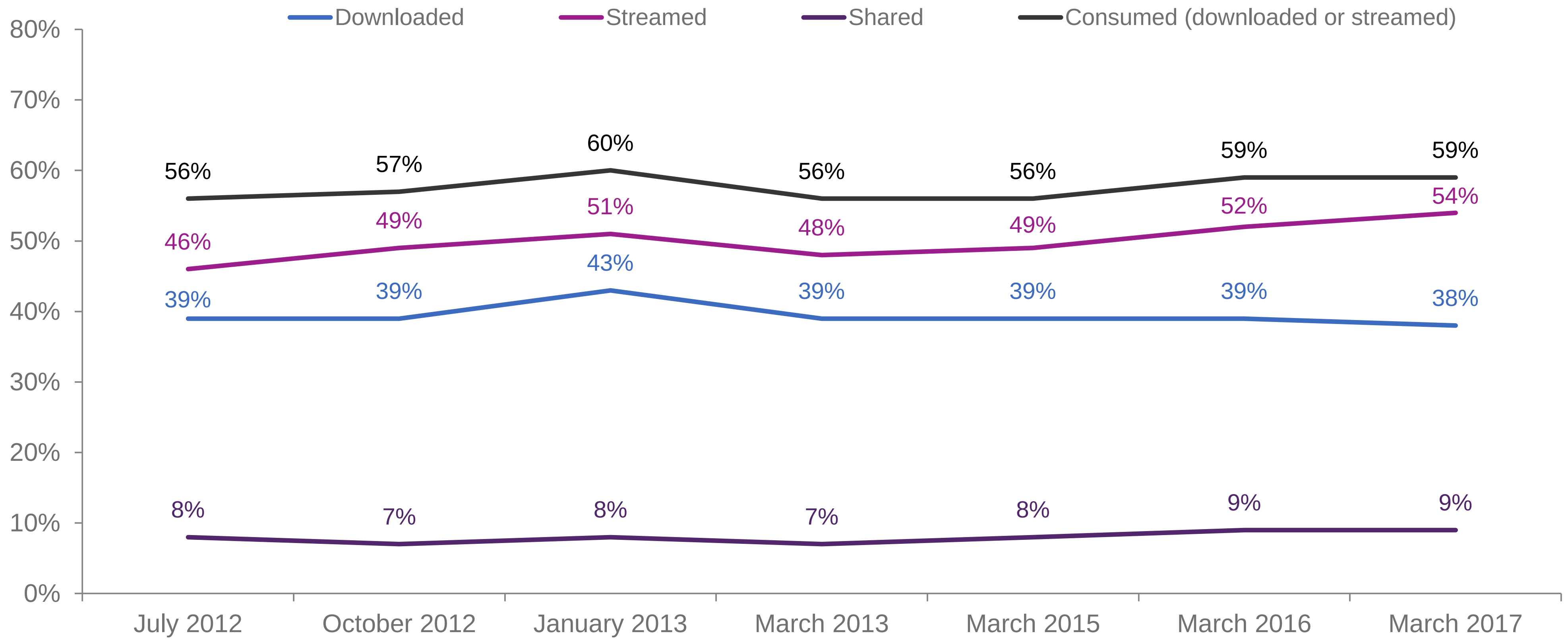
As far as possible…

- Same fieldwork period (online and F2F)
- Same time of the year as previous annual waves (March)
- Same methodology (online and face-to-face)
- Same sample composition (all in the UK aged 12+)
- Same operations teams
- Same survey as previous waves (only minimal edits)

Significant increase since March 2016
Significant decrease since March 2016

Consistency in our approach allows us to accurately track over time

Online activity in the last three months



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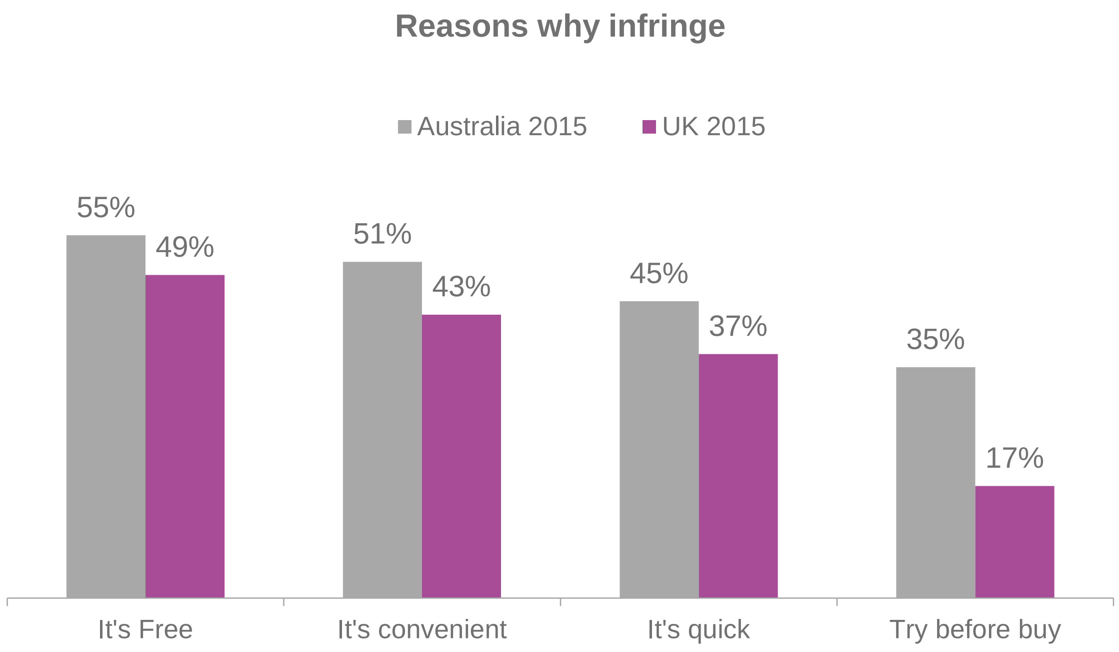
Q2.A.B.C Have you downloaded / streamed / shared any of the following in the last 3 months? Base: all internet users aged 12+ (March 2017 n=4573 / March 2016 n=4670)

Consistency in approach allows us to compare across markets

Both surveys run in the same period and using mixed method 12+yrs

43%	% who consume illegally, among content consumers	27%
44%		23%
37%		24%
33%		21%
22%		18%



Honesty

- Online – 100% self-completion
- Face-to-face – self-completion screens for sensitive questions
- Indirect lines of questioning re. illegal content
  - Indicate how many files consumed in the past 3 months
  - Indicate how many files obtained ‘legally’
  - Derive the number of illegal files by subtracting the ‘legal’ number from the total

Significant increase since March 2016

Significant decrease since March 2016

Our approach allows people to give us open and frank answers

Top five reasons for using illegal services

	July 2012	October 2012	January 2013	March 2013	March 2015	March 2016	March 2017
Base: all who have downloaded or streamed/accessed files through an illegal service in the last 3 months	746	860	917	882	754	746	747
It is easy / more convenient	**48%**	**46%**	**40%**	**45%**	**43%**	**45%**	**45%**
It is free	**54%**	**50%**	**48%**	**49%**	**50%**	**49%**	**44%**
It is quick	**44%**	**43%**	**36%**	**36%**	**37%**	**42%**	**37%**
It means I can try something before I buy it	**26%**	**26%**	**25%**	**27%**	**17%**	**18%**	**19%**
Because I can	**19%**	**20%**	**15%**	**18%**	**16%**	**15%**	**18%**

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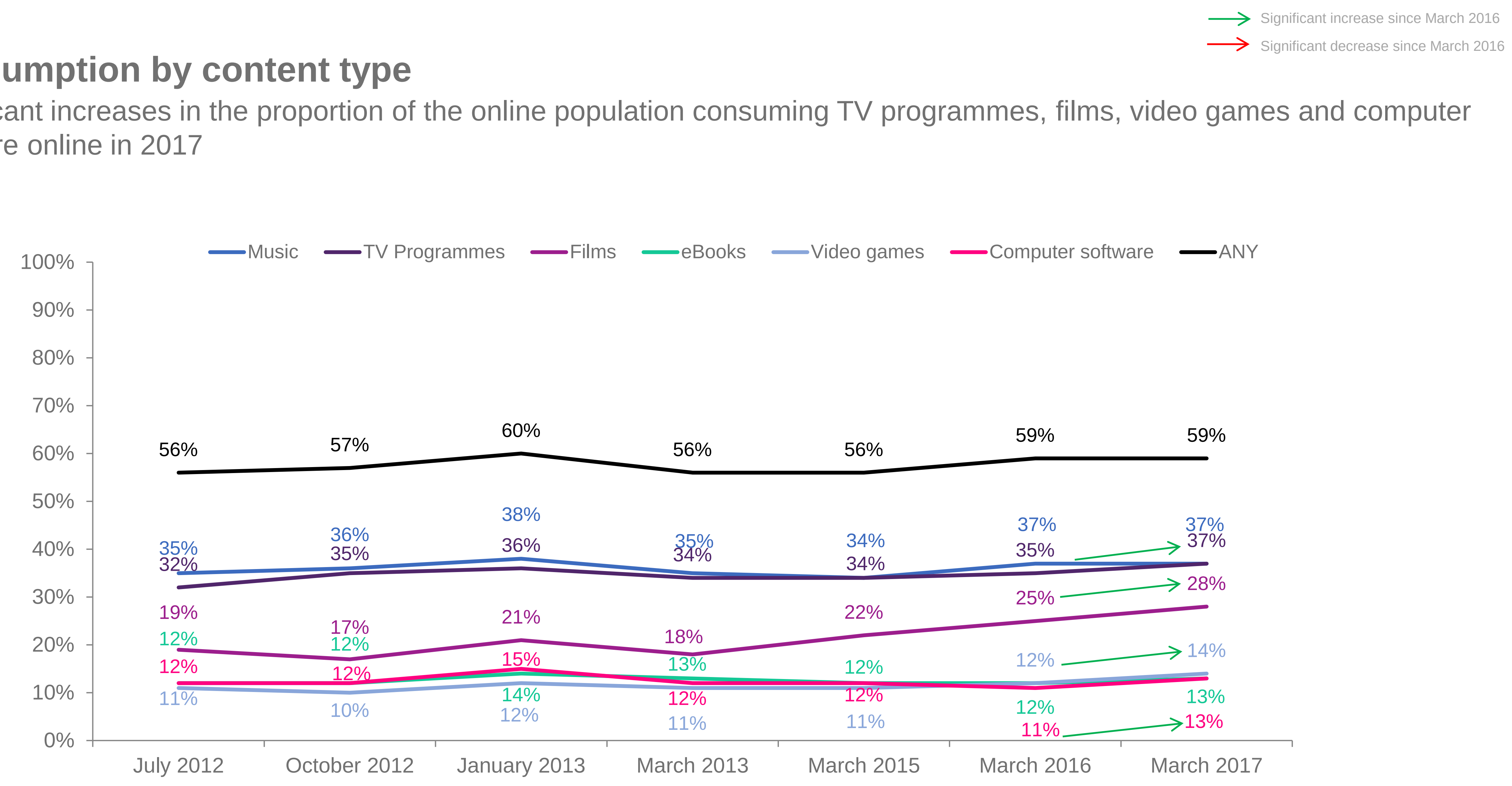
Q.10a: Reasons for using illegal services. Base: : All aged 12+ who have downloaded or streamed/accessed any of the six content types illegally in the last three months

2017 key findings

Overall consumption

Consumption by content type

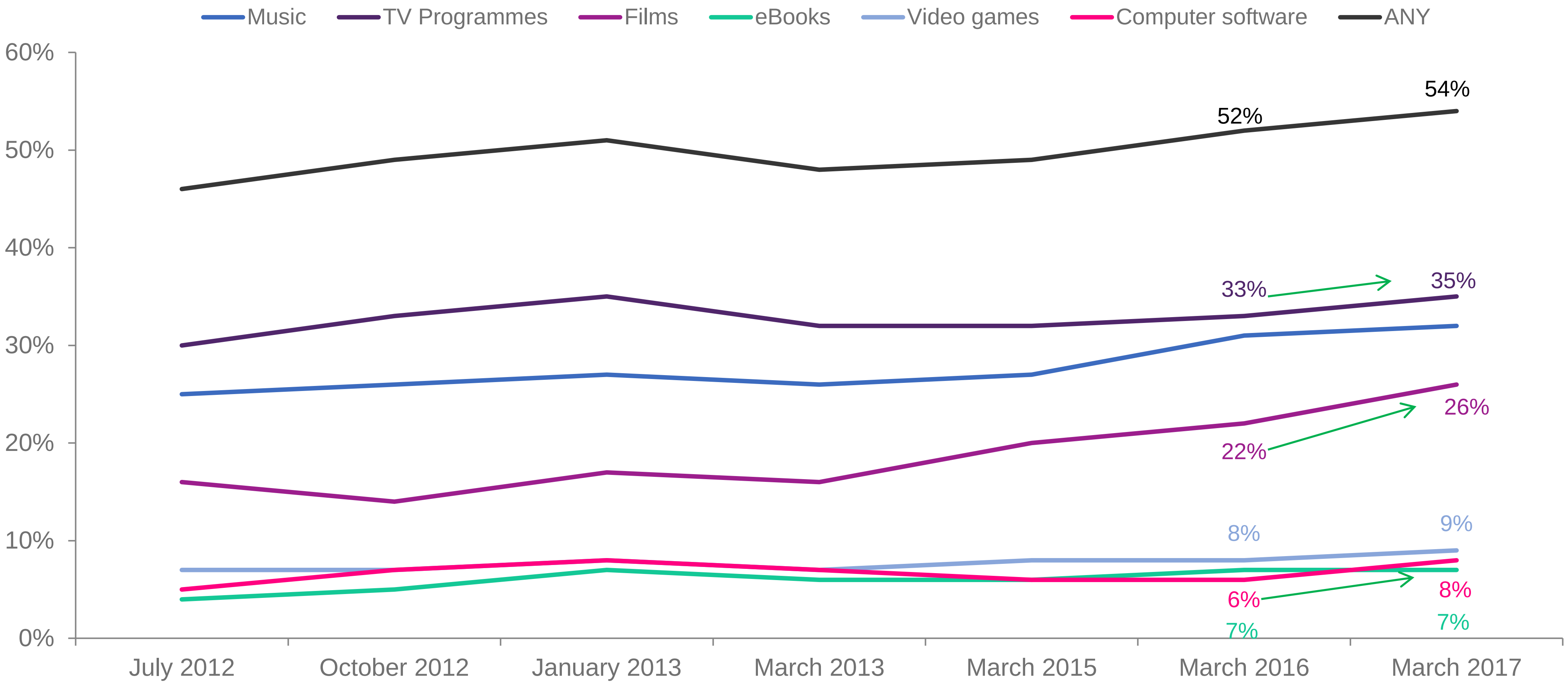
Significant increases in the proportion of the online population consuming TV programmes, films, video games and computer software online in 2017



Q2.A.B.C Have you downloaded / streamed any of the following through the internet in the past three months? Base: all internet users aged 12+ (March 2017 n=4573 / March 2016 n=4670)

Streaming/accessing of each content type over time

Significant increases in streaming of TV programmes and films amongst the online population since March 2016

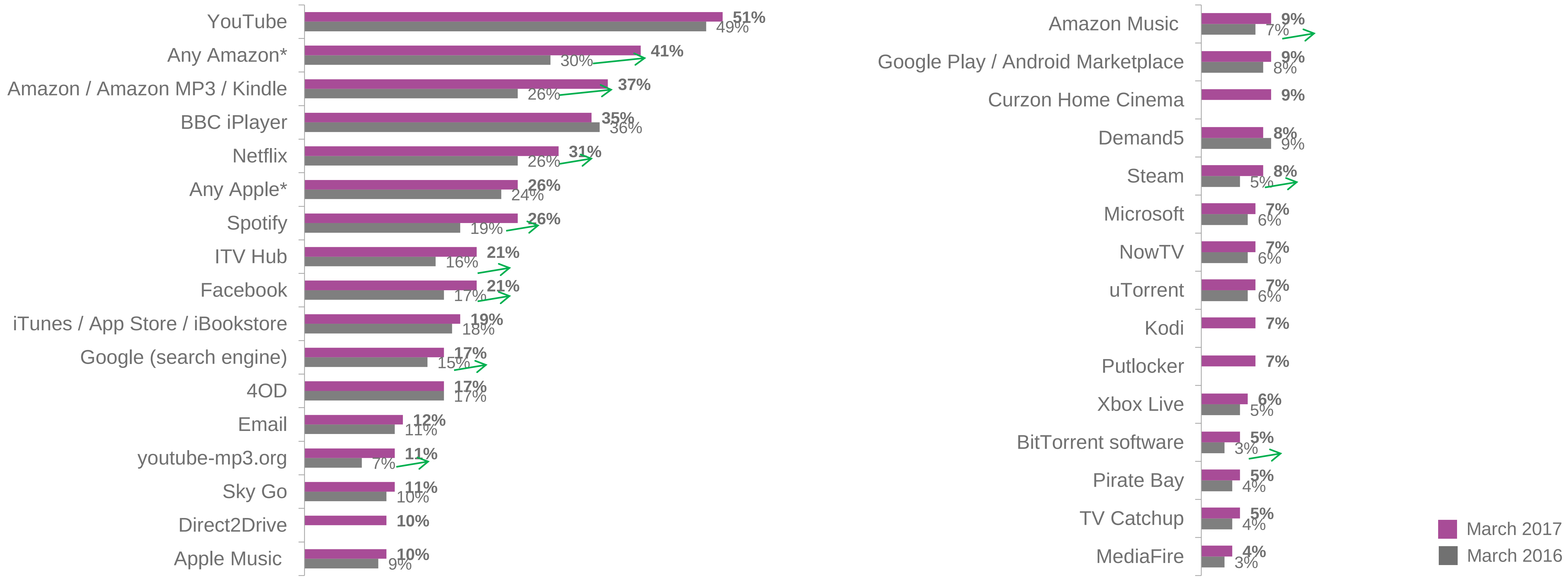


KANTAR MEDIA Q2.A Have you streamed/accessed any of the following through the internet in the past three months? Base: all internet users aged 12+ (March 2017 n=4573 / March 2016 n=4670)

Significant increase since March 2016
Significant decrease since March 2016

Sources used to download, stream or share content

YouTube remains the most popular service used amongst those who have consumed or shared content in the last three months, with just over half claiming to have used the service in the last three months. Significant increases are recorded for a range of streaming services since 2016 too (e.g. Amazon, Netflix, Spotify, ITV Hub)

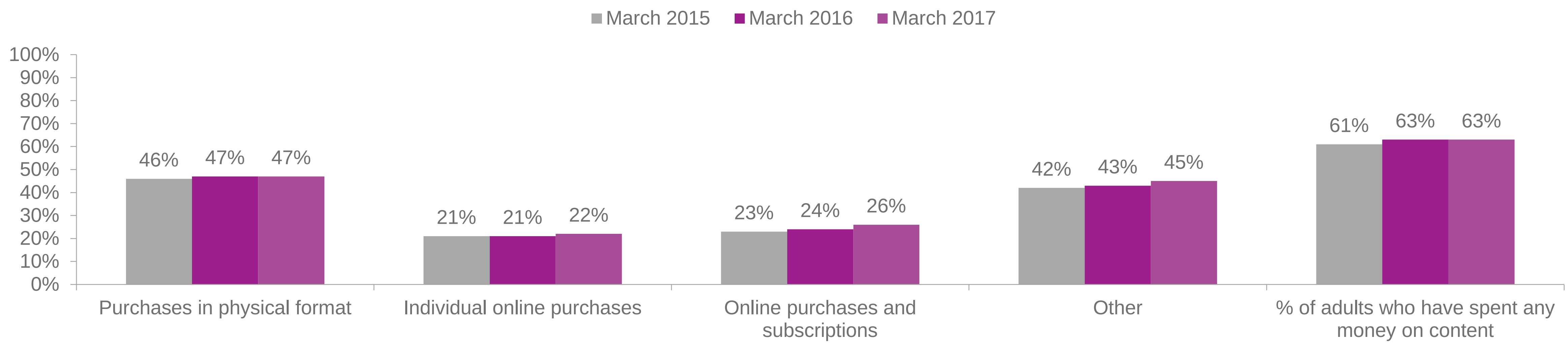


Q.bx_4:Sources used to download, stream/access or share content. Base: All those who have downloaded, streamed or shared content in the last three months (March 2017 n=3014 / March 2016 n=3040)

Spending

Spending on different types of content

Whilst the proportion of people who have paid for content remains largely stable, the total average spend across all consumers is now 10% higher than last year (now at £75.04)

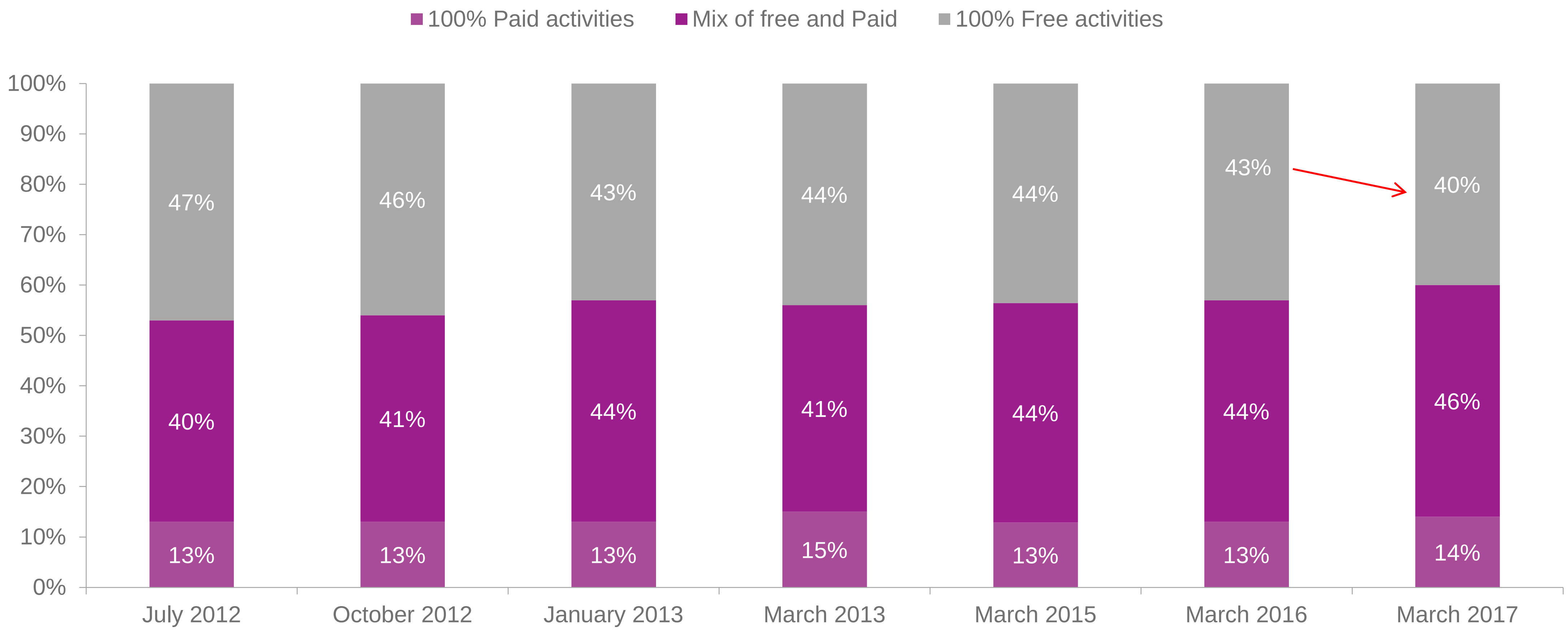


	July 2012	October 2012	January 2013	March 2013	March 2015	March 2016	March 2017
Purchases in physical format	£29.98	£34.58	£42.48	£28.80	£23.65	£22.30	£23.72
Individual online purchases	£5.45	£6.03	£7.38	£6.88	£6.68	£7.57	£7.94
Online purchases and subscriptions	£1.26	£1.60	£9.54	£9.61	£9.75	£12.12	£13.10
Other	£20.73	£20.76	£29.51	£26.49	£24.38	£24.17	£28.84
Total	**£57.44**	**£62.97**	**£81.52**	**£73.74**	**£67.37**	**£68.18**	**£75.04**

Q.BX_1SUM. Approximately how much have you personally spent on the following in the past three months? Base: All aged 12+ (March 2017 n=5,267 / March 2016 n=5,310 / March 2015 n=5,192)

% of content paid for

At the same time, the proportion of people who only consume free content fell significantly in 2017, now at 40%



Q.Bx_5a. How many did you personally pay for, either as a one off or as part of a subscription? | Base: all who have downloaded or streamed any of the six content types in the last 3 months (March 2017 n=3001, March 2016 n=3040)

Significant increase since March 2016

Significant decrease since March 2016

Top five reasons for using paid services to access content

‘Convenience’ remains the top reason for paying to access content. There has also been a significant increase in the proportion who claim that paid for content is better quality than content which is free to access

	July 2012	October 2012	January 2013	March 2013	March 2015	March 2016	March 2017
Base: all who have paid to download or stream/access any content in the last 3 months	1351	1578	1776	1615	1817	1708	1749
It is easier / more convenient	**45%**	**45%**	**46%**	**47%**	**46%**	**48%**	**48%**
It’s quicker	**39%**	**40%**	**39%**	**40%**	**42%**	**43%**	**41%**
I don’t want to use illegal sites	**38%**	**42%**	**41%**	**38%**	**37%**	**31%**	**34%**
They are better quality	**23%**	**22%**	**21%**	**22%**	**24%**	**23%**	**27%**
I think it is morally wrong to use illegal sites	**26%**	**29%**	**28%**	**24%**	**23%**	**23%**	**23%**

Q.7 What were your personal reasons for doing this rather than using services where you could have got them for free? | Base: All aged 12+ who have paid to download or stream/access any of the six content types in the last 3 months

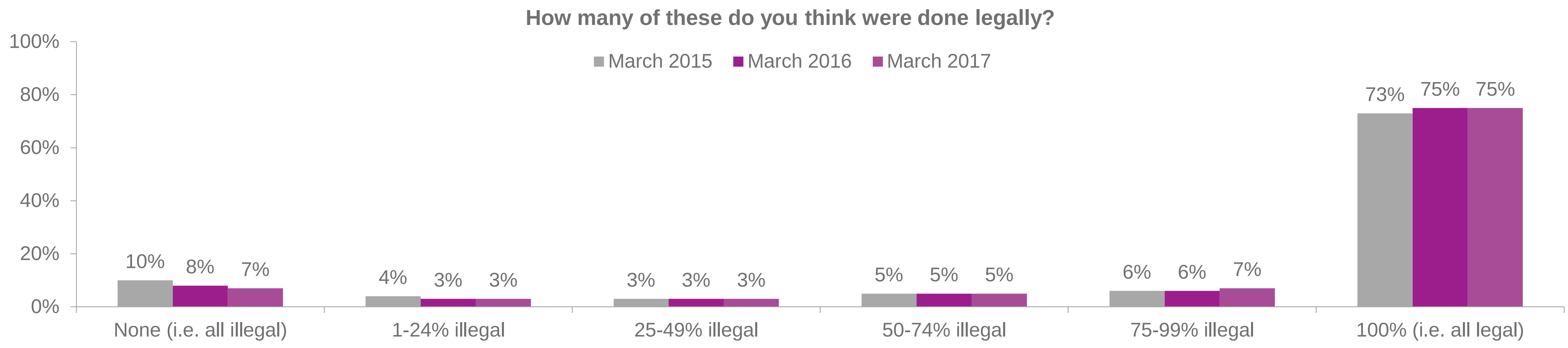
Infringement

Significant increase since March 2016

Significant decrease since March 2016

Levels of infringement

The proportion of those who have engaged in infringement in the last three months remains at the same level as seen in March 2016, with 1 in 4 claiming to have done so

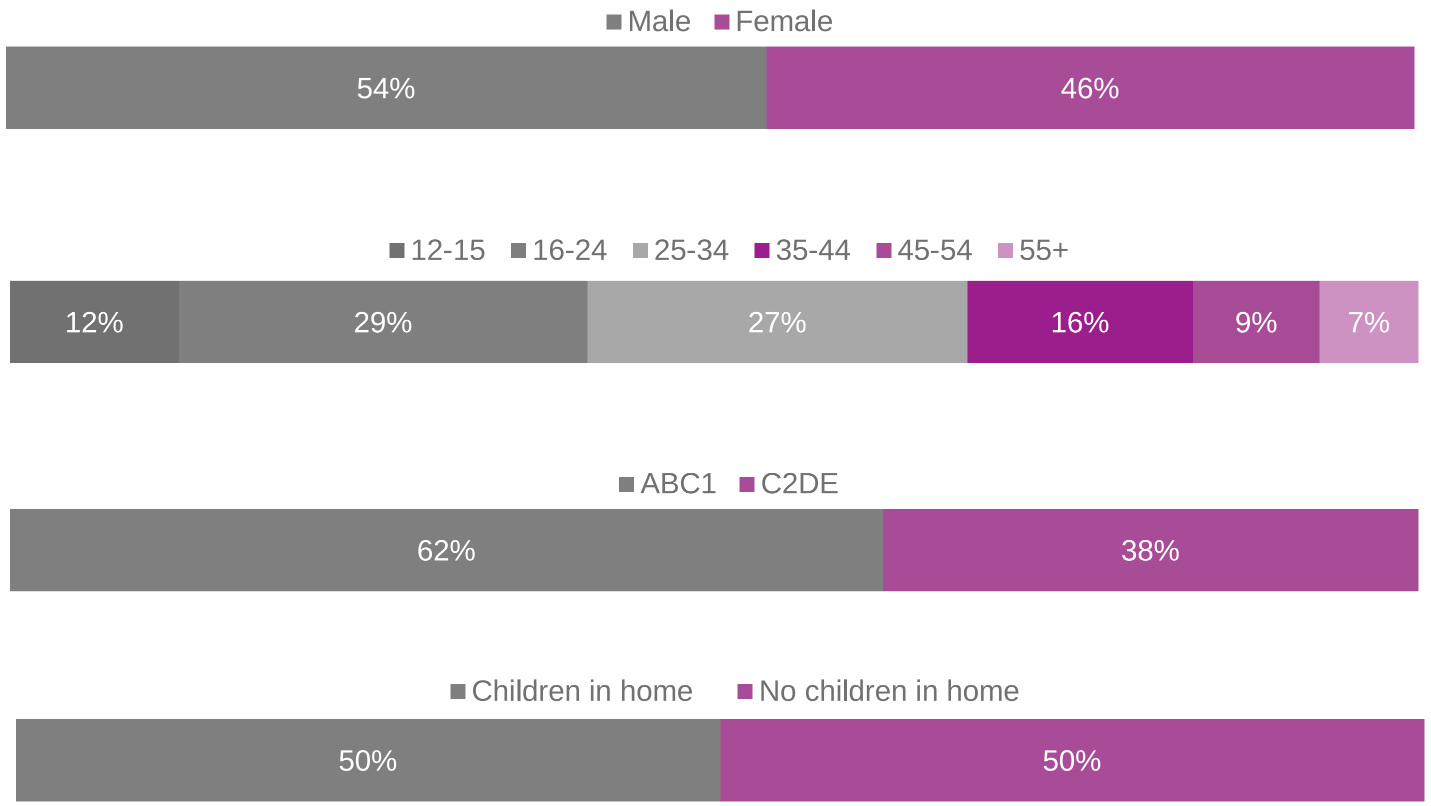


	July 2012	October 2012	January 2013	March 2013	March 2015	March 2016	March 2017
Base: All who have streamed/downloaded content in the last 3 months	2599	2922	3118	2921	2830	3040	3001
All legal	**71%**	**71%**	**70%**	**70%**	**73%**	**75%**	**75%**
Mix of legal and illegal	**22%**	**19%**	**21%**	**22%**	**17%**	**17%**	**18%**
All illegal	**8%**	**9%**	**8%**	**8%**	**10%**	**8%**	**7%**
NET: Any illegal	***29%***	***29%***	***30%***	***30%***	***27%***	***25%***	***25%***

Q.Bx_7: How many of these do you think were done so legally? Base: All aged 12+ who have downloaded or streamed/accessed any of the six content types in the last 3 months (including paid illegal)

Profile of infringers

The profile of those who infringe is skewed slightly towards males, and heavily towards those aged under 35 and ABC1. In terms of having children in the home or not, this is split evenly



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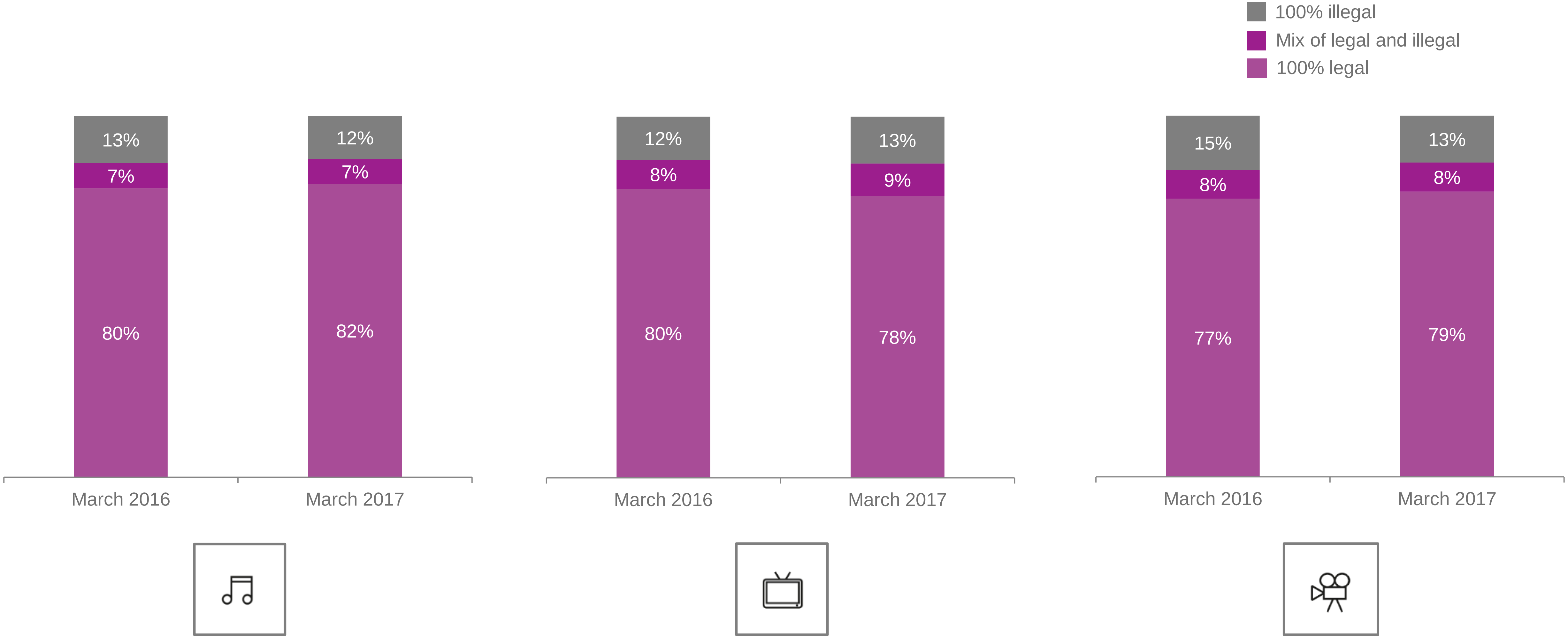
Q.Bx_7. You indicated that you have downloaded or streamed/accessed [content] in the past 3 months. How many of these do you think were done so legally? (Including paid illegal)
Base: All aged 12+ who have downloaded or streamed/accessed any of the six content types illegally in the last three months (March 2017 n=747)

Legal and illegal content accessed across categories

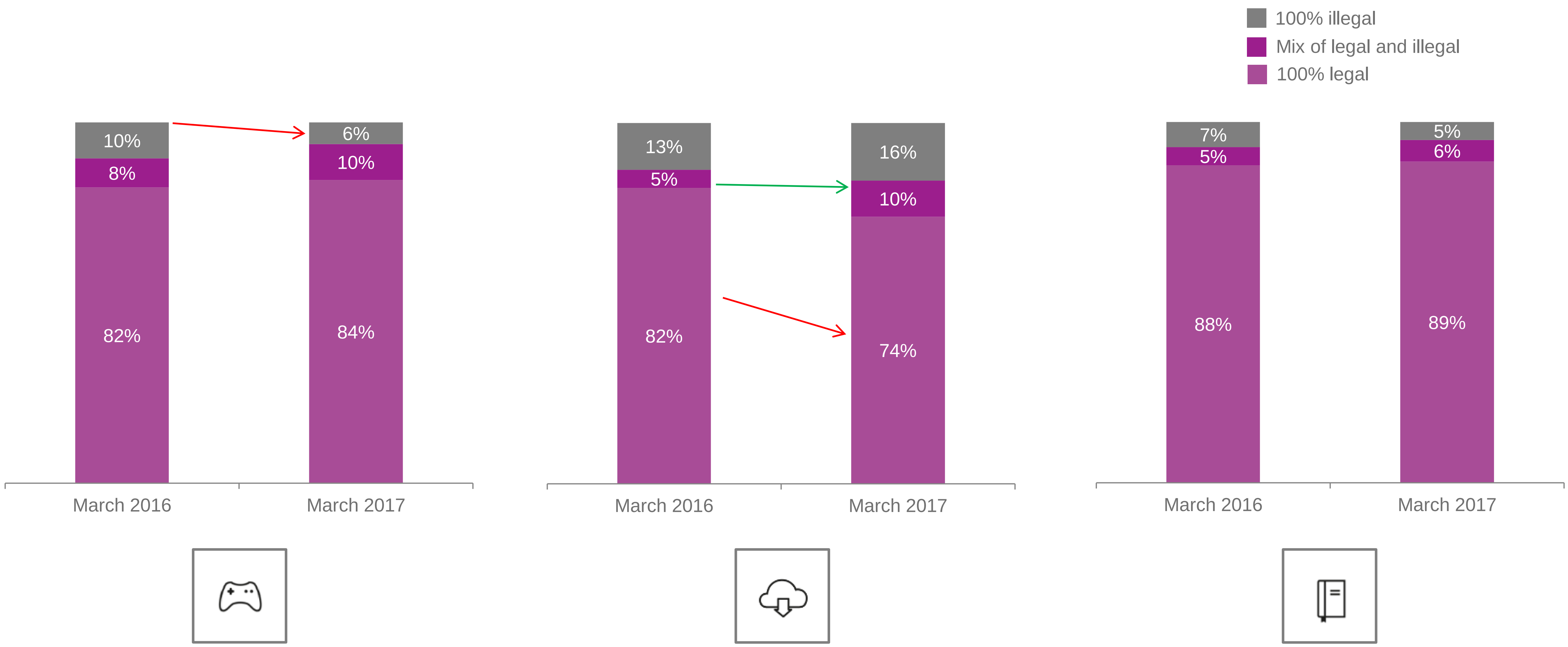
When looking at music, TV programmes and films, there have been no significant movements in the proportions of consumers of each content type who consume it illegally since March 2016



Q.Bx_7 You indicated that you have downloaded or streamed/accessed [content type] in the past 3 months. How many of these do you think were done so legally? (Including paid illegal)
Base: Music (March 2017 n=1925 / March 2016 n=1919), TV programmes (March 2017 n=1792 / March 2016 n=1771), Films (March 2017 n=1416, March 2016 n=1267)

Legal and illegal content accessed across categories

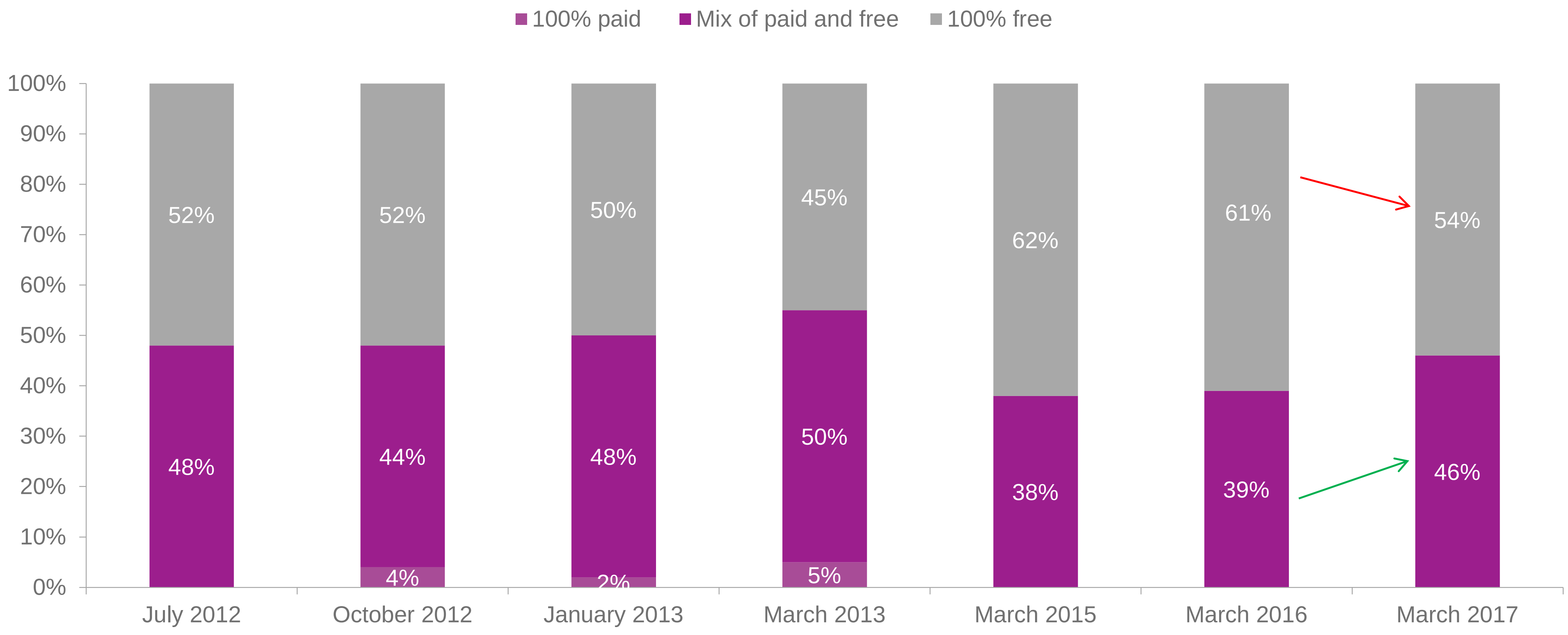
A significant drop in the proportion of video games consumers who have consumed all such content illegally. For computer software, we see a significant increase in the proportion consuming both legal and illegal content. No shifts for those who consume eBooks



Q.Bx_7 You indicated that you have downloaded or streamed/accessed [content type] in the past 3 months. How many of these do you think were done so legally? (Including paid illegal)
Base: Video games (March 2017 n=782, March 2016 n=673), Computer Software (March 2017 n=615 / March 2016 n=628), eBooks (March 2017 n=627 / March 2016 n=628)

Proportion of content (legal and illegal) paid for by infringers

A significant decrease in the proportion of infringers who are only consuming free content*



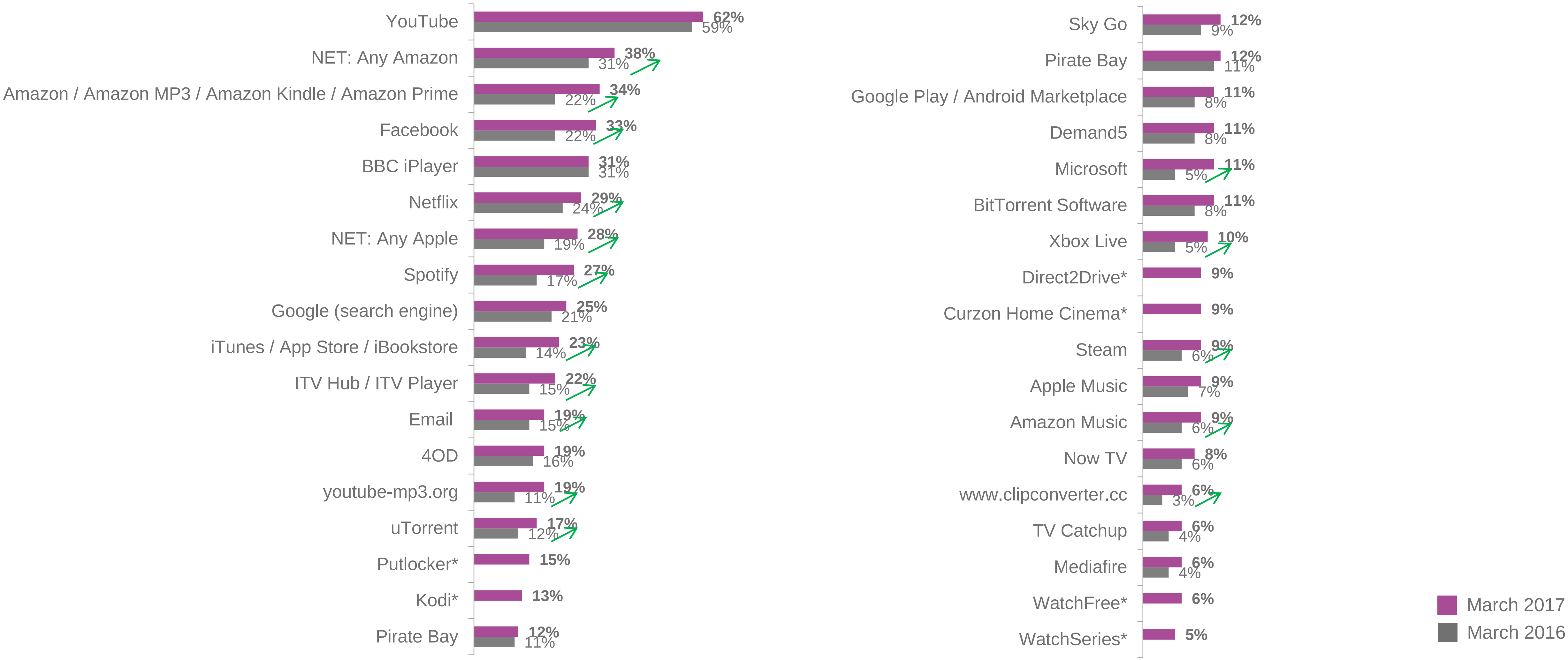
Q.Bx_5a. How many did you personally pay for, either as a one off or as part of a subscription? Base: All aged 12+ who have downloaded or streamed/accessed any of the six content types illegally in the last three months (March 2017 n=747 / March 2016 n=746)

*This does not reflect illegal content, but all content that they consume

Significant increase since March 2016
Significant decrease since March 2016

Sources (legal and illegal) used by infringers

YouTube also remains the most used source amongst infringers. We similarly see increases in many of the streaming services.



Q.bx_4:Sources used to download, stream or share content. Base: : All aged 12+ who have downloaded or streamed/accessed any of the six content types illegally in the last three months (March 2017 n=747 / March 2016 n=746)

Please note, these are not necessarily the sources used to infringe. These are sources used by infringers.

*Not included in March 2016.

Significant increase since March 2016

Significant decrease since March 2016

Top five reasons that would discourage the use of illegal services

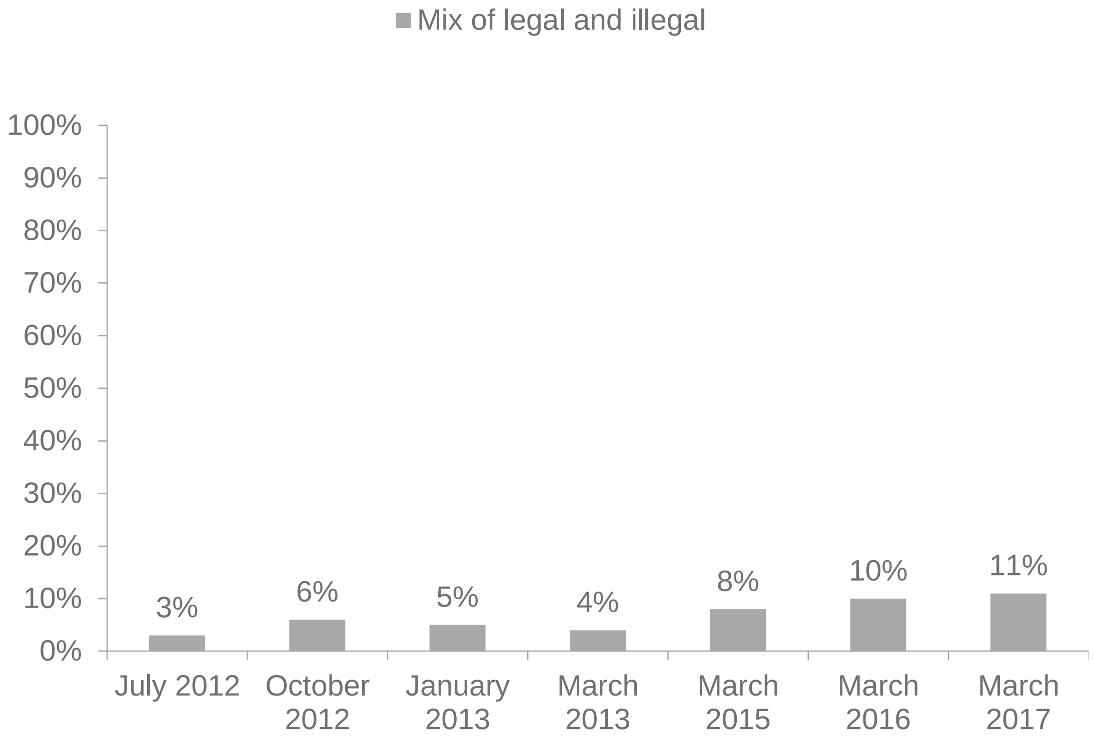
The majority of reasons that would discourage illegal infringement relate to the availability of content. There was also a significant increase in the proportion who claimed that if a subscription service of interest became available, they would stop/ That said, amongst infringers the proportion of those who claim 'nothing would make them stop' continues to increase

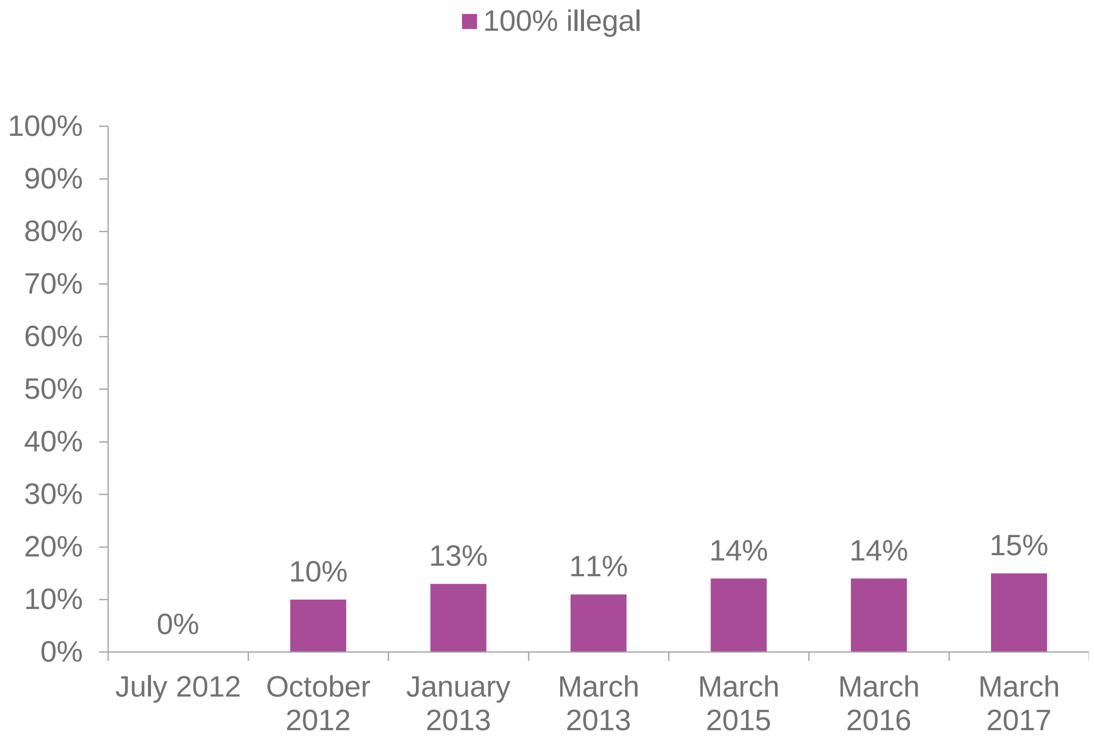
	July 2012	October 2012	January 2013	March 2013	March 2015	March 2016	March 2017
Base: all who have downloaded or streamed/accessed files through an illegal service in the last 3 months	746	860	917	882	754	746	747
If everything I wanted was available legally	**32%**	**25%**	**22%**	**27%**	**21%**	**20%**	**22%**
If it was clearer what is legal and what isn't	**26%**	**25%**	**24%**	**24%**	**21%**	**20%**	**22%**
If legal services were cheaper	**39%**	**30%**	**28%**	**32%**	**25%**	**24%**	**21%**
If everything I wanted was available legally online as soon as it was released elsewhere	**22%**	**21%**	**18%**	**21%**	**16%**	**15%**	**17%**
If a subscription service I was interested in became available	**17%**	**18%**	**16%**	**16%**	**14%**	**9%**	**16%**
Nothing would make me stop	**3%**	**7%**	**9%**	**6%**	**10%**	**11%**	**12%**

Q.10a: Reasons for using illegal services. Base: : All aged 12+ who have downloaded or streamed/accessed any of the six content types illegally in the last three months

Proportion of different infringer groups who claim nothing would make them stop

Those who infringe 100% of their content are more likely to state that nothing would make them stop. Both groups see a slight uplift in this





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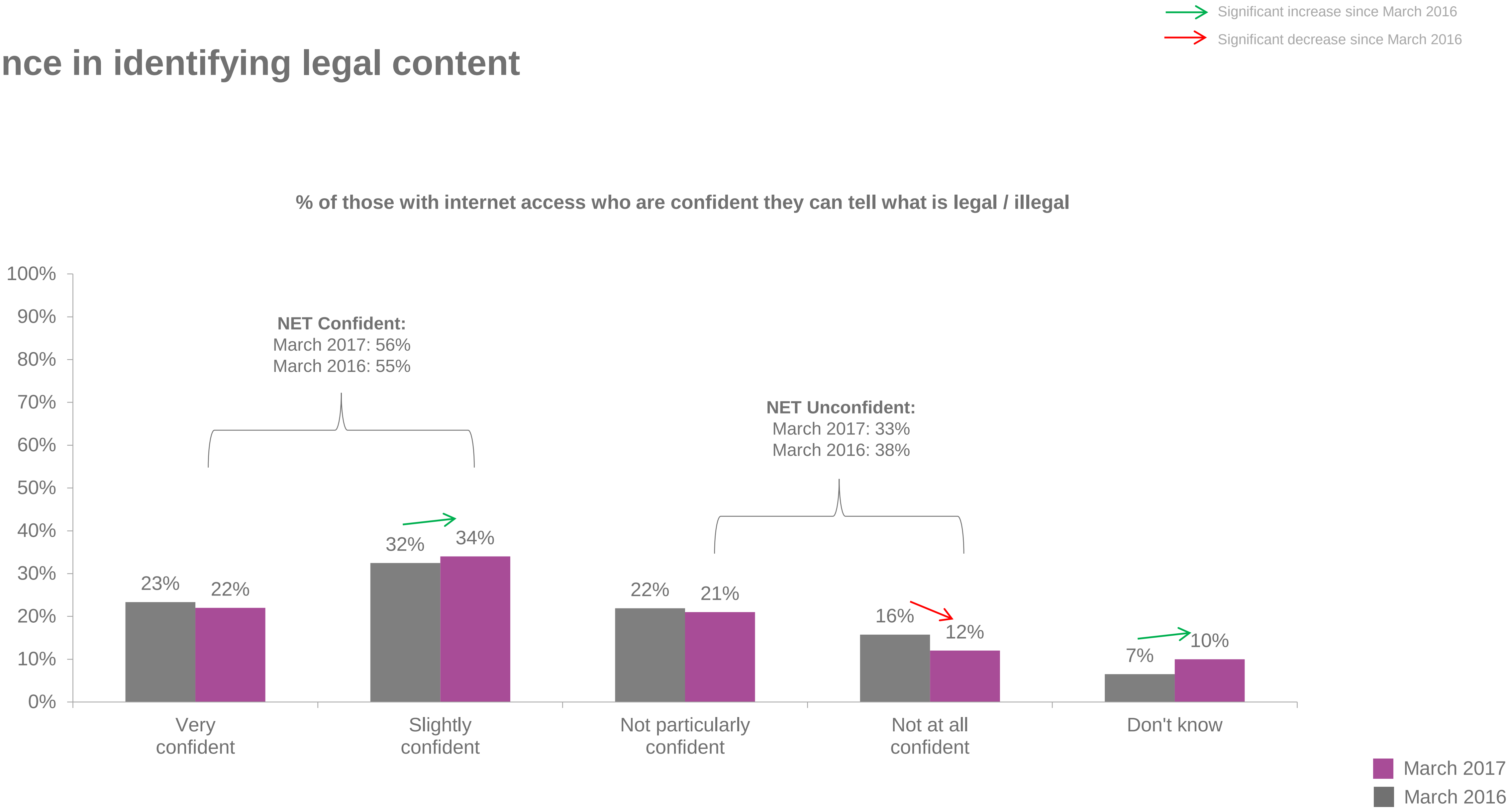
Q10b: Things that would stop people from infringement activities. Base: All those who have downloaded or streamed/accessed content both legally and illegally in the last three months (March 2017 n=546), all those who have downloaded or streamed/accessed all their content illegally in the last three months n=201)

Confidence in identifying legal content



Q.11A How confident are you that you know what is legal and what is not in terms of downloading, streaming/accessing and sharing content through the internet?
Base: All aged 12+ with internet access (March 2017 n=4573 / March 2016 n=4670)

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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