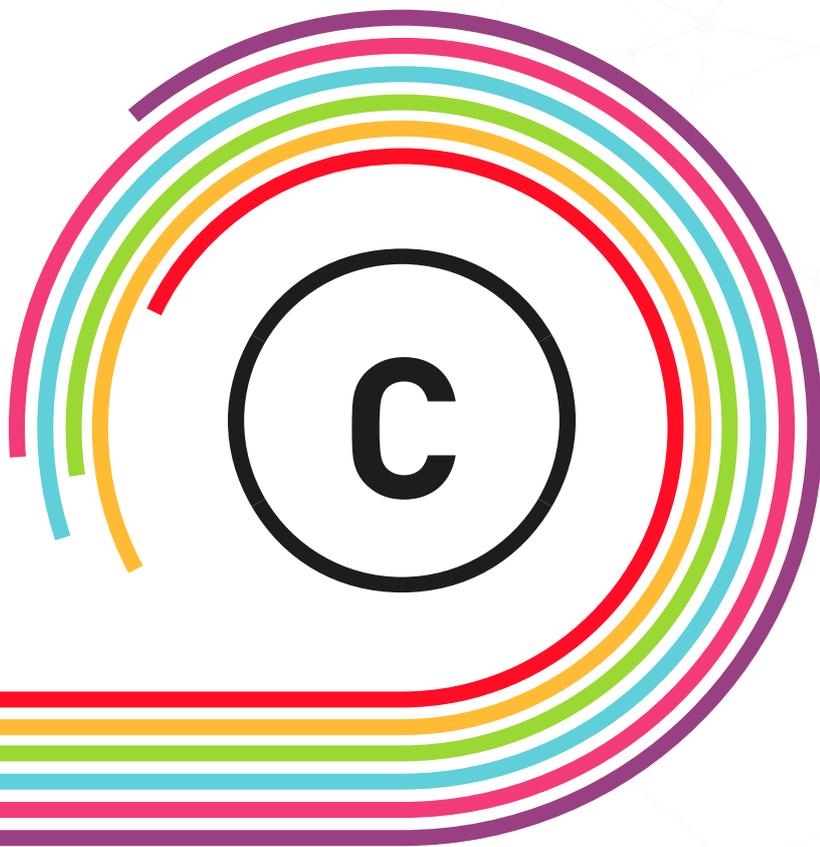


INFRINGEMENT LEVELS

Mar–May 2016



June 2016

OVERALL TRENDS

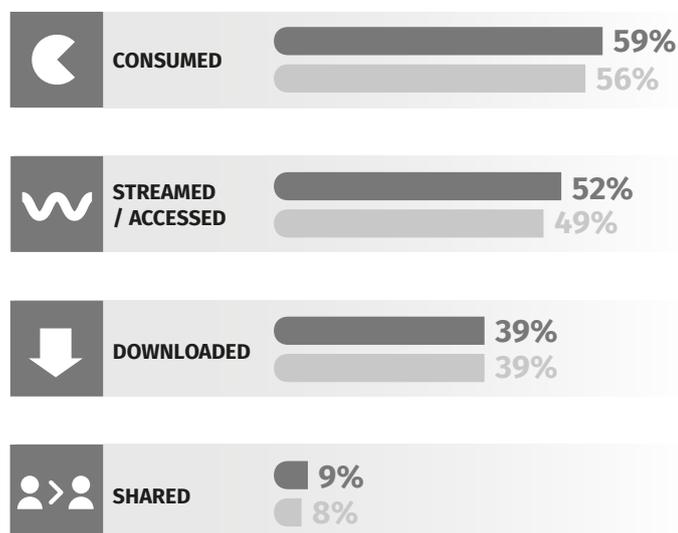
ACTIVITY & INFRINGEMENT Mar-May 2016

The **Intellectual Property Office** commissioned Kantar Media to conduct research to update existing information on the levels of online copyright infringement across six consumer categories. Here we summarise the research findings and compare levels of infringement across categories before exploring each in a little more depth.

Overall, levels of infringement remain relatively stable from those identified in 2015. Music still holds its position as the category with which people are most active online. Since the last wave of research, we see notable increases in streaming activities and subscription services.

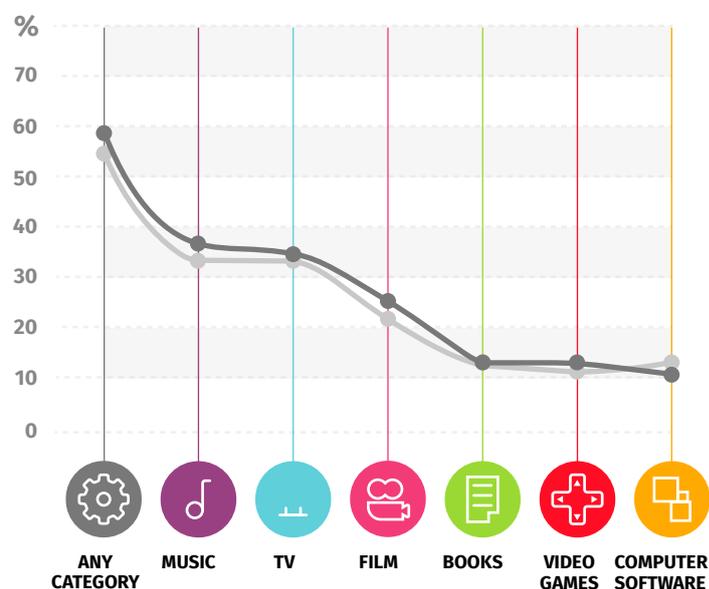
ACTIVITY

ACTIVITIES CONDUCTED



KEY: ■ Mar-May 2016 ■ Mar-May 2015

CONTENT CONSUMPTION



INFRINGEMENT

KEY:

■ Mar-May 2016 ■ Mar-May 2015

OVERALL LEVEL OF INFRINGEMENT ▼

ANY ILLEGAL ACTIVITY



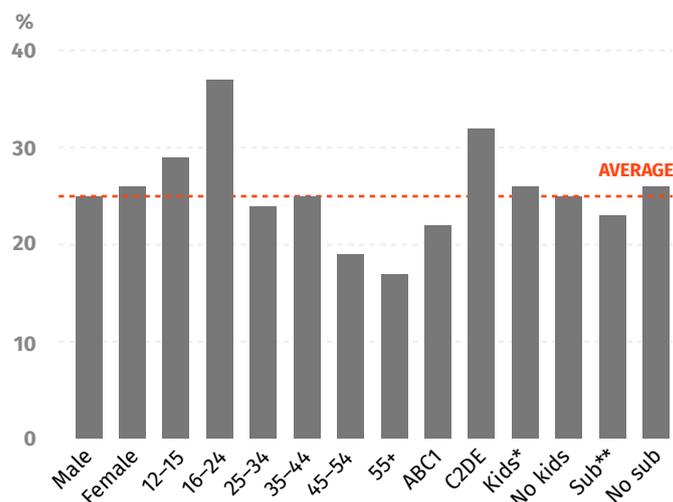
100% ILLEGAL ACTIVITY



Sources: Kantar Media 2016

100% ILLEGAL INFRINGERS BY DEMOGRAPHIC

(Mar-May 2016) ▼



* Kids in household

** Used a subscription service in the last 3 months

MUSIC

IN THE PAST THREE MONTHS

16.4M

UK internet users have accessed music online...

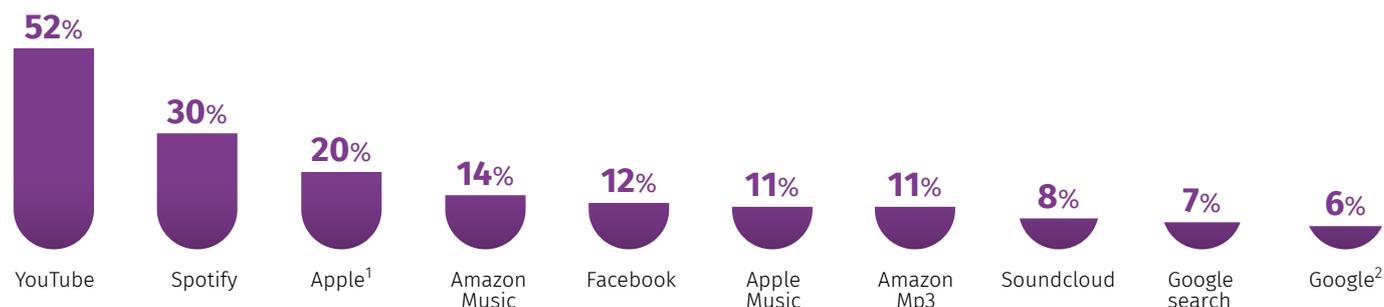
13.8M
Streamed music online

10M
Downloaded music online

The following data is amongst those who streamed/downloaded music online in the past three months (Mar-May 2016)...

TOP 10 SOURCES USED

These are the main sources people used to stream/download music



MARKET

Total value of market ▶ **£1.8bn**

Other:
£637M (35%)

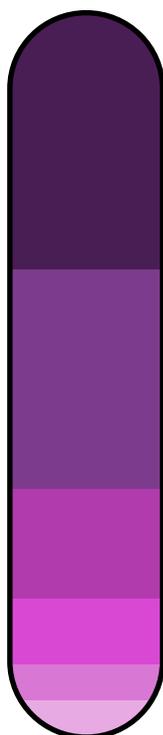
Live
£547M (30%)

Physical:
£280M (15%)

Subscriptions:
£170M (9%)

Digital
£96M (5%)

Merchandise:
£90M (5%)



INFRINGEMENT

■ Mar-May 2016
■ Mar-May 2015

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



KEY POINTS

Most active:	Biggest source:	Infringers:
16-24 Year olds	52% YouTube	20% of music consumers have infringed

1. iTunes / App Store
2. Google Play / Android Marketplace

FILM

IN THE PAST THREE MONTHS

11.1M

UK internet users have accessed films online...

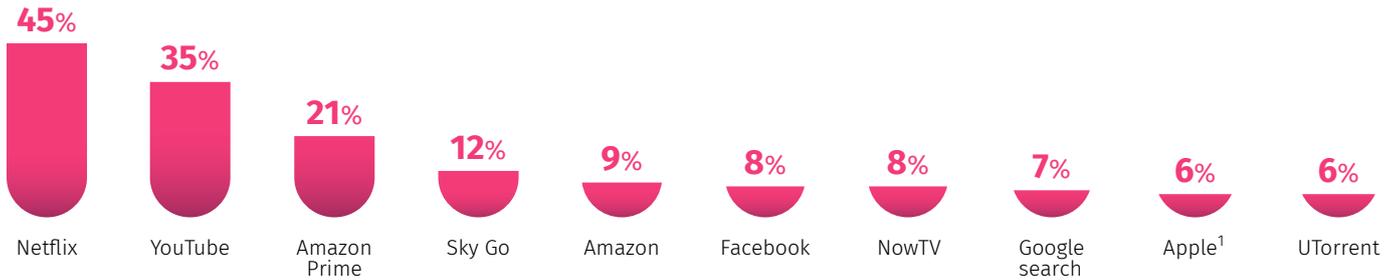
10M
Streamed films online

4.5M
Downloaded films online

The following data is amongst those who streamed/downloaded films online in the past three months (Mar-May 2016)...

TOP 10 SOURCES USED

These are the main sources people used to stream/download films



MARKET

Total value of market ▶ **£1.4bn**

Other:
£496M (35%)

Cinema
£429M (30%)

Physical:
£237M (17%)

Subscriptions:
£74M (5%)

Pay per view
£68M (5%)

Merchandise
£67M (5%)

Digital:
£39M (3%)



INFRINGEMENT

■ Mar-May 2016
■ Mar-May 2015

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



KEY POINTS

Most active: Biggest source: Infringers:

12-15
Year olds

45%
Netflix

24%
of film consumers have infringed

1. iTunes / App Store

TV

IN THE PAST THREE MONTHS

15.6M

UK internet users have accessed TV programmes online...

14.6M
Streamed TV programmes online

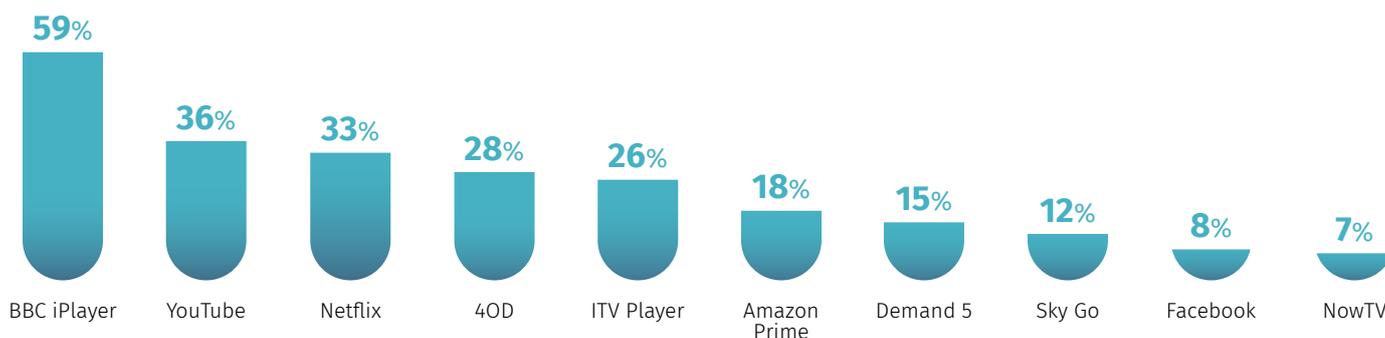
4.7M
Downloaded TV programmes online

The following data is amongst those who streamed/downloaded TV programmes online in the past three months (Mar-May 2016)...

TOP 10 SOURCES USED

These are the main sources people used to stream/download TV programmes

BBC iPlayer YouTube NETFLIX 4OD itv PLAYER amazon.com Prime DEMAND5 Sky Go f NOW TV



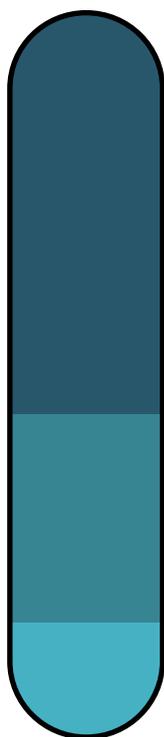
MARKET

Total value of market ▶ **£0.3bn**

Physical:
£178M (55%)

Merchandise:
£93M (29%)

**Downloaded/
Streamed online**
£50M (16%)



INFRINGEMENT

■ Mar-May 2016
■ Mar-May 2015

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



KEY POINTS

Most active: Biggest source: Infringers:

12-15
Year olds

59%
BBC iPlayer

20%
of TV programme consumers have infringed

BOOKS

IN THE PAST THREE MONTHS

5.6M

UK internet users have accessed books online...

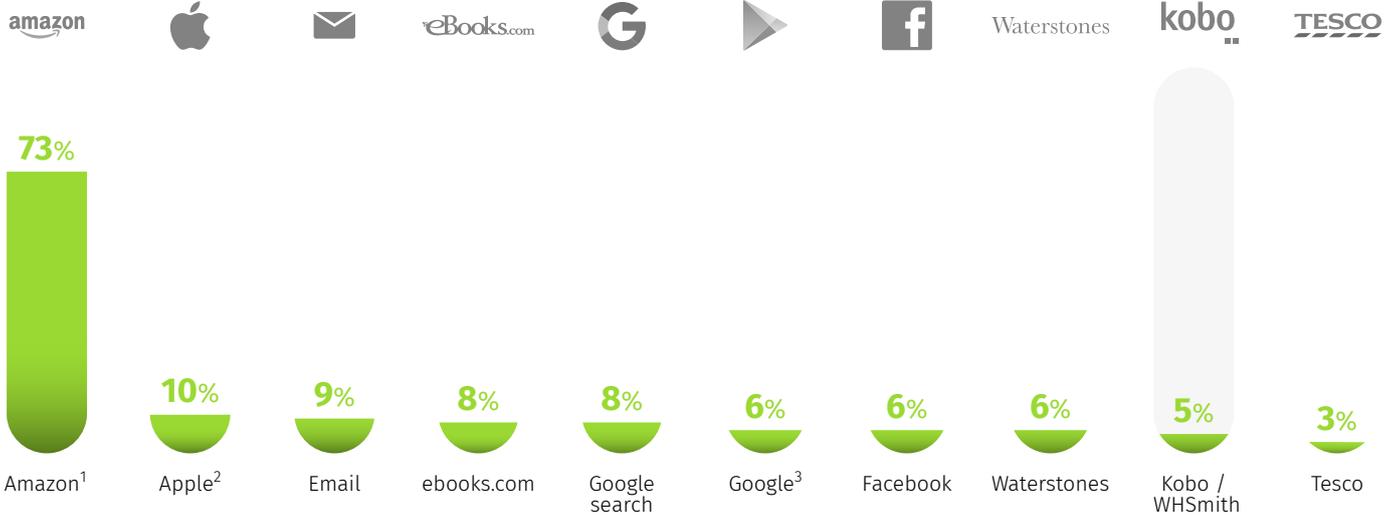
3M
Accessed books online

4.6M
Downloaded books online

The following data is amongst those who accessed/downloaded books online in the past three months (Mar-May 2016)...

TOP 10 SOURCES USED

These are the main sources people used to access/download books



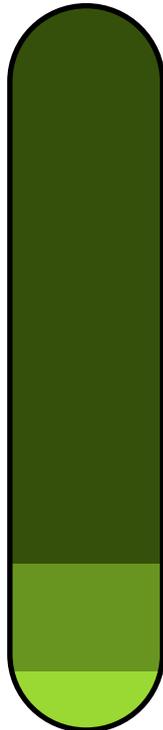
MARKET

Total value of market ▶ **£0.6bn**

Physical:
£433M (77%)

Other:
£81M (15%)

Digital:
£46M (8%)



INFRINGEMENT

■ Mar-May 2016
■ Mar-May 2015

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



KEY POINTS

Most active:	Biggest source:	Infringers:
55+ Year olds	73% Amazon / Amazon mp3 / Kindle	12% of book consumers have infringed

1. Amazon / Amazon mp3 / Kindle | 2. iTunes / App Store / iBookstore / Apple store | 3. Google Play / Android Marketplace

COMPUTER SOFTWARE



IN THE PAST THREE MONTHS

5.1M

UK internet users have accessed computer software online...



2.8M
Accessed software online

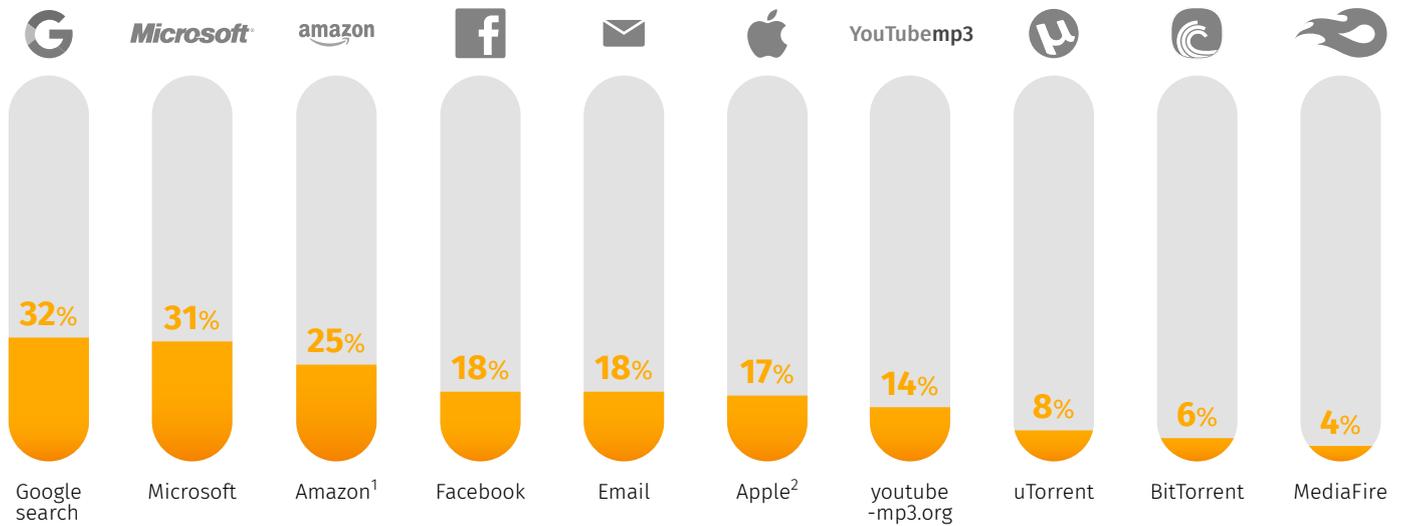


3.8M
Downloaded software online

The following data is amongst those who accessed/downloaded books online in the past three months (Mar-May 2016)...

TOP 10 SOURCES USED

These are the main sources people used to access/download software

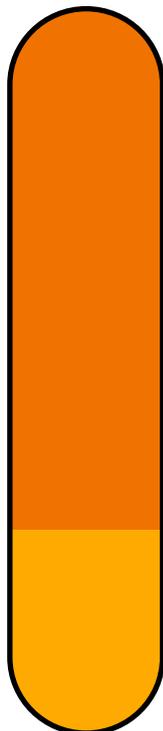


MARKET

Total value of market ▶ **£0.2bn**

Physical:
£180M (72%)

Digital:
£69M (28%)



INFRINGEMENT

■ Mar-May 2016
■ Mar-May 2015

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



KEY POINTS

Most active:	Biggest source:	Infringers:
12-15 Year olds	32% Google search	19% of software consumers have infringed

1. Amazon / Amazon mp3 / Kindle

2. iTunes / App Store / iBookstore / Apple Store

VIDEO GAMES



IN THE PAST THREE MONTHS

5.4M

UK internet users have accessed video games online...

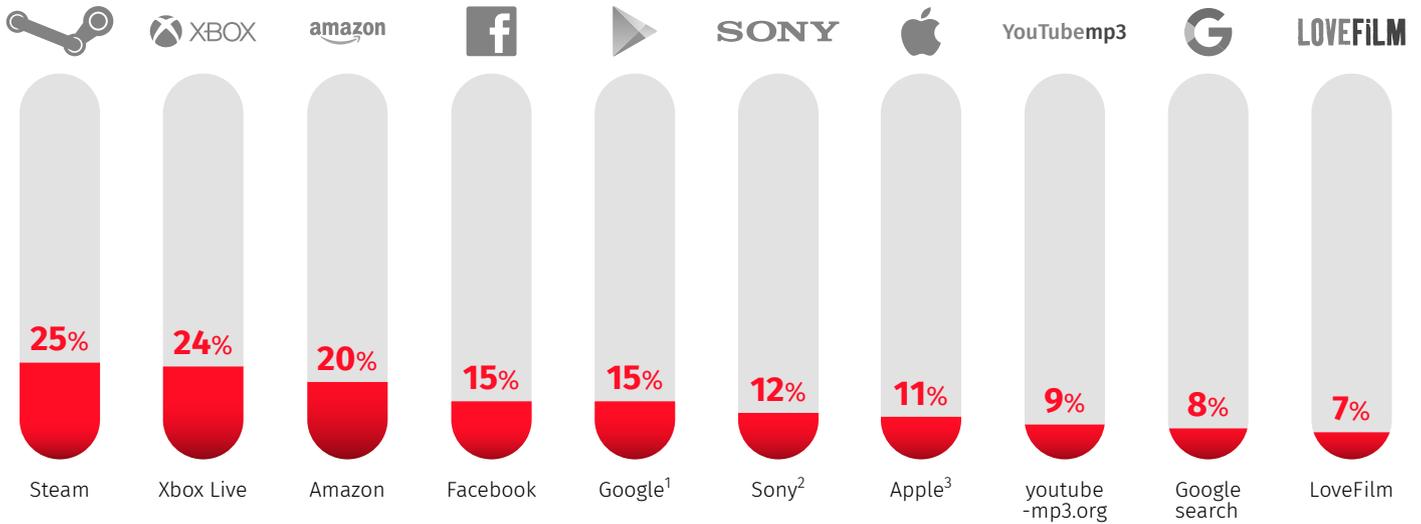
3.5M
Accessed video games online

3.5M
Downloaded video games online

The following data is amongst those who accessed/downloaded video games online in the past three months (Mar-May 2016)...

TOP 10 SOURCES USED

These are the main sources used to access/download video games



MARKET

Total value of market ▶ **£0.5**bn

Physical:
£302M (62%)

Digital:
£105M (22%)

Other:
£79M (16%)



INFRINGEMENT

■ Mar-May 2016
■ Mar-May 2015

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



KEY POINTS

Most active:	Biggest source:	Infringers:
12-15 Year olds	25% Steam	18% of video game consumers have infringed

1. Google Play / Android Marketplace | 2. Sony Entertainment Network -- Music Unlimited / Video Unlimited / PS network | 3. iTunes / App Store / iBookstore / Apple Store

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KANTAR MEDIA

Powering Informed Decisions



Intellectual
Property
Office