

INFRINGEMENT LEVELS

March 2018



July 2018

OVERALL TRENDS

ACTIVITY & INFRINGEMENT March 2018

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.

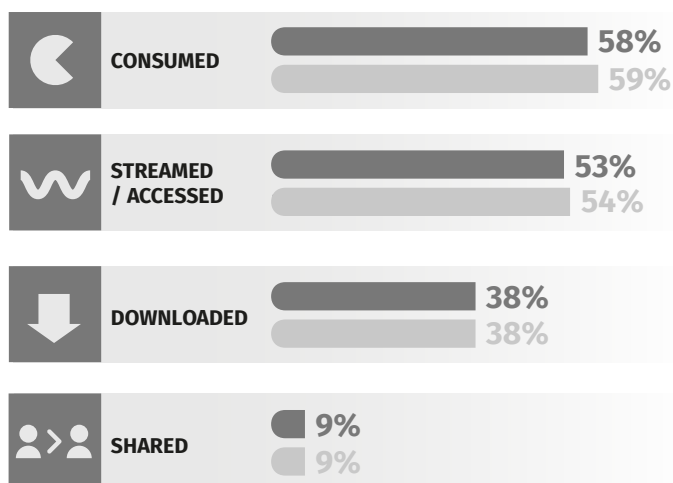
Overall, levels of infringement have remained relatively stable for the past three years. However, it is still important to remember this is a sizeable proportion of the UK population. Digging into the data, we also see greater evidence of change as our digital services and behaviour evolve. Music still holds its position as the category with which people are most active online.



ACTIVITY

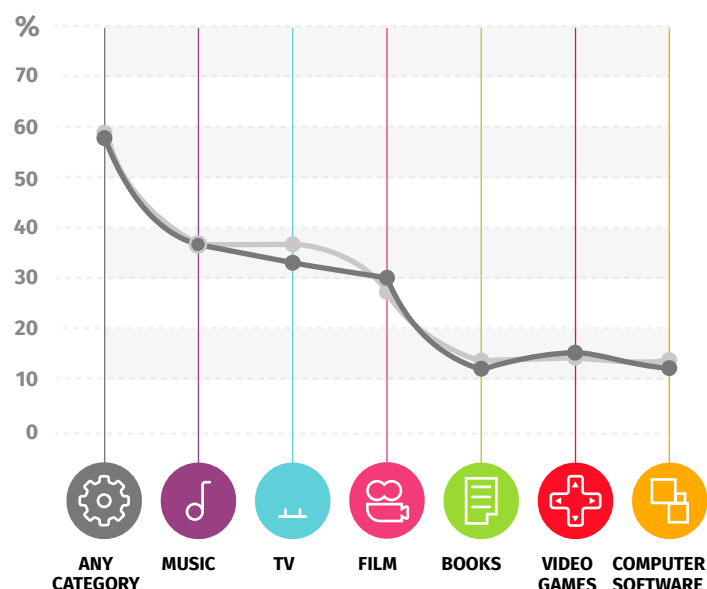
Base: UK internet users aged 12+ KEY: ■ March 2018 ■ March 2017

ACTIVITIES CONDUCTED



* Question was asking the individual if he/she consumed any of these media types in the last three months

CONTENT CONSUMPTION*



INFRINGEMENT

Among content consumers

KEY:

■ March 2018 ■ March 2017

OVERALL LEVEL OF INFRINGEMENT ▼

ANY ILLEGAL ACTIVITY



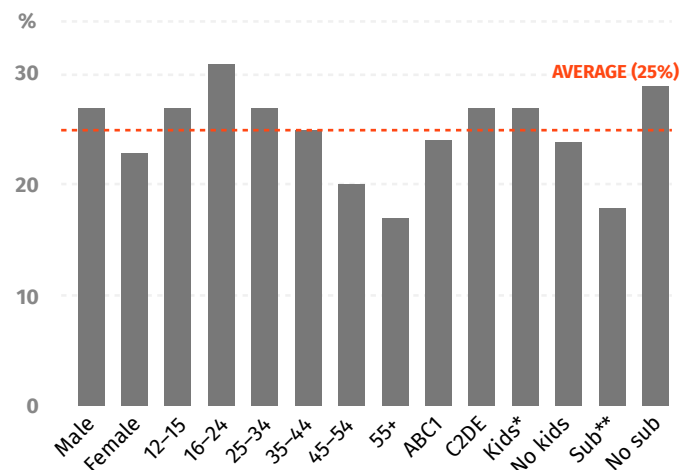
100% ILLEGAL ACTIVITY



Sources: Kantar Media 2018

ANY ILLEGAL INFRINGERS BY DEMOGRAPHIC

(March 2018) ▼



* Kids in household

**Paid for a music or TV subscription service in the last 3 months

MUSIC

IN THE PAST THREE MONTHS

16.7M

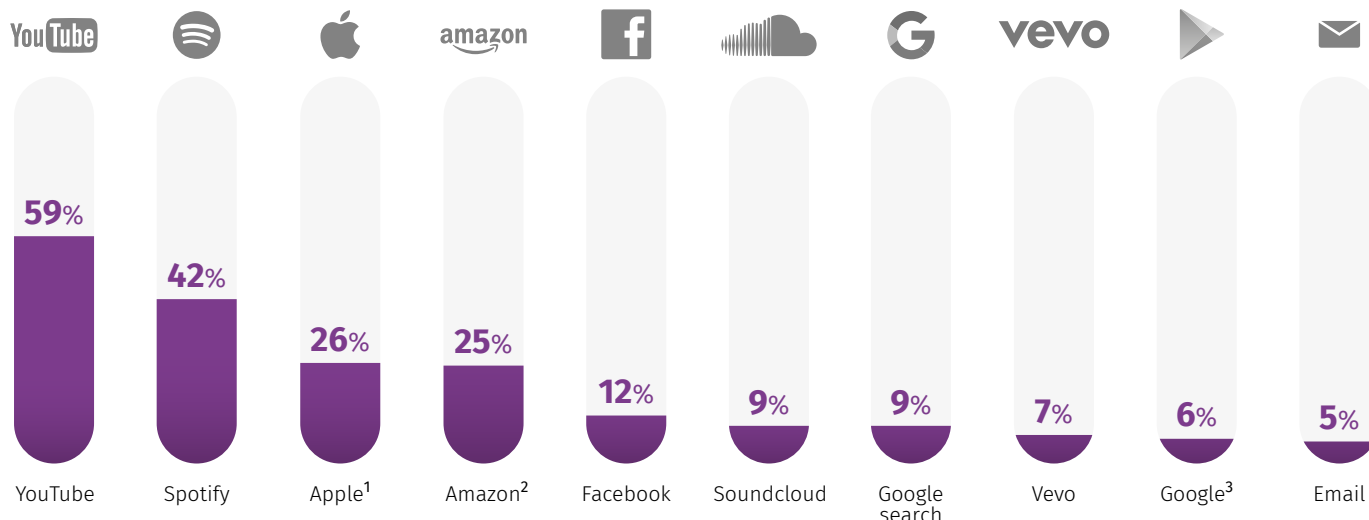
UK internet users have accessed music online...

14.8M
Streamed music online

9.3M
Downloaded music online

TOP 10 SOURCES USED

These are the main sources people used to stream/download/share music in the last three months (1863 respondents)



MARKET

Total value of market ▶ **£1.3bn**

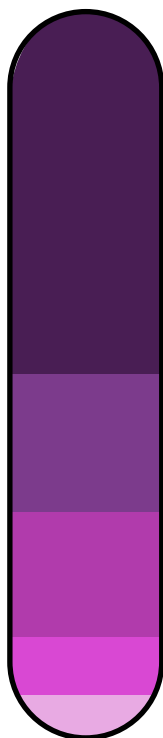
Live
£633M (50%)

Online subscriptions:
£233M (19%)

Physical:
£211M (17%)

Merchandise:
£103M (8%)

Digital:
£79M (6%)



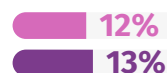
INFRINGEMENT

Among consumers of the category

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



KEY POINTS

Most active:	Biggest source:	Infringers:
16-24 Year olds	59% YouTube	17% of music consumers have infringed

1. Apple Music & iTunes | 2. Amazon Mp3 & Amazon Music | 3. Google Play / Android Marketplace

FILM

IN THE PAST THREE MONTHS

13.2M

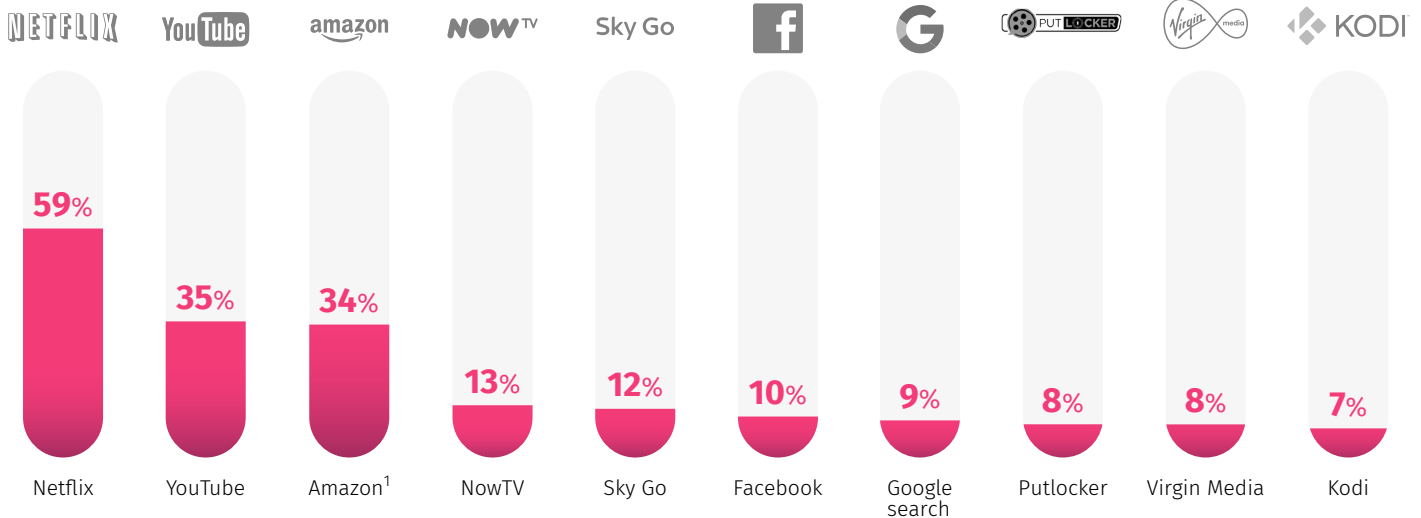
UK internet users have accessed films online...

12.3M
Streamed films online

4M
Downloaded films online

TOP 10 SOURCES USED

These are the main sources people used to stream/download/share films in the last three months (1447 respondents)



MARKET

Total value of market ▶ **£1bn**

Cinema:
£477M (47%)

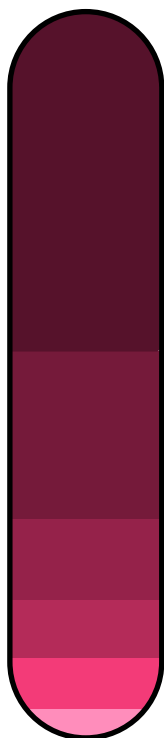
Physical:
£236M (23%)

Subscriptions:
£111M (11%)

Merchandise:
£84M (8%)

Pay per view:
£72M (7%)

Digital:
£45M (4%)



INFRINGEMENT

Among consumers of the category

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



KEY POINTS

Most active:	Biggest source:	Infringers:
16-24 Year olds	59% Netflix	19% of film consumers have infringed

1. Amazon, Amazon Prime

TV

IN THE PAST THREE MONTHS

14.5M

UK internet users have accessed TV programmes online...



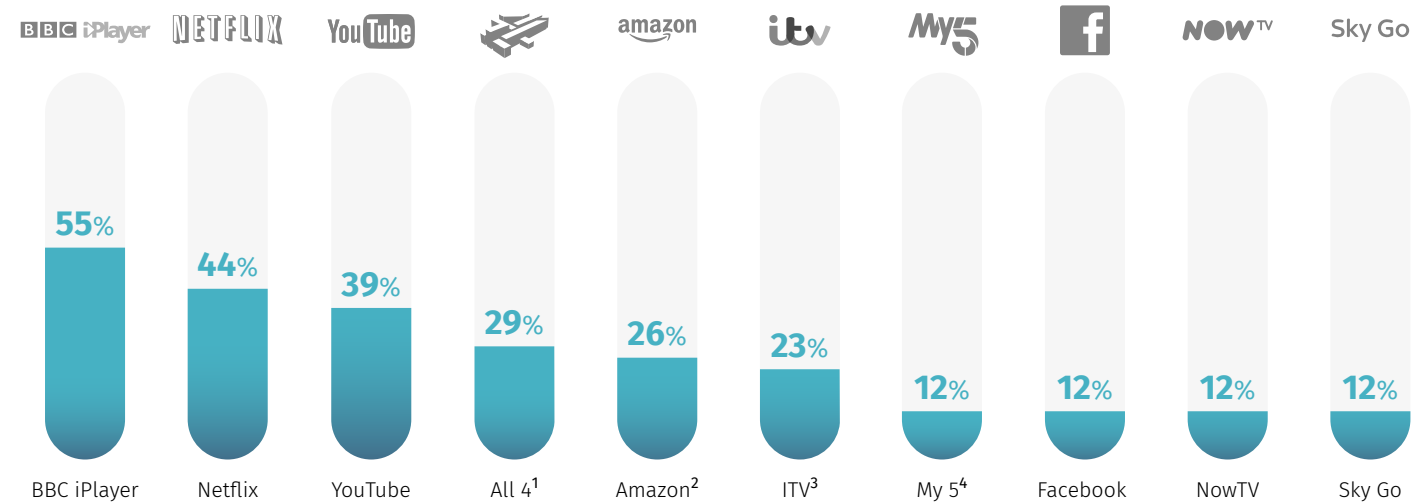
13.6M
Streamed TV programmes online



4M
Downloaded TV programmes online

TOP 10 SOURCES USED

These are the main sources people used to stream/download/share TV programmes in the last three months (1576 respondents)



MARKET

Total value of market ▶ **£0.3bn**

Physical purchases/rentals:
£189M (54%)

Merchandise:
£95M (28%)

Digital purchases:
£62M (18%)



INFRINGEMENT

Among consumers of the category

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



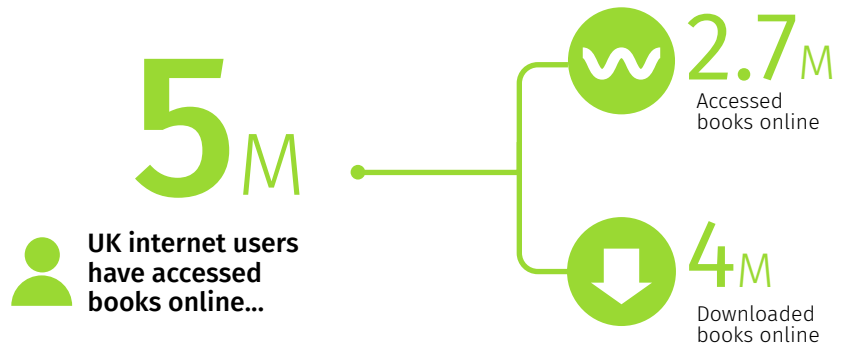
KEY POINTS

Most active:	Biggest source:	Infringers:
16-24 Year olds	55% BBC iPlayer	23% of TV programme consumers have infringed

1. Previously '4OD' | 2. Amazon / Amazon Prime
3. ITV Hub & ITV player | 4. Previously 'Demand 5'

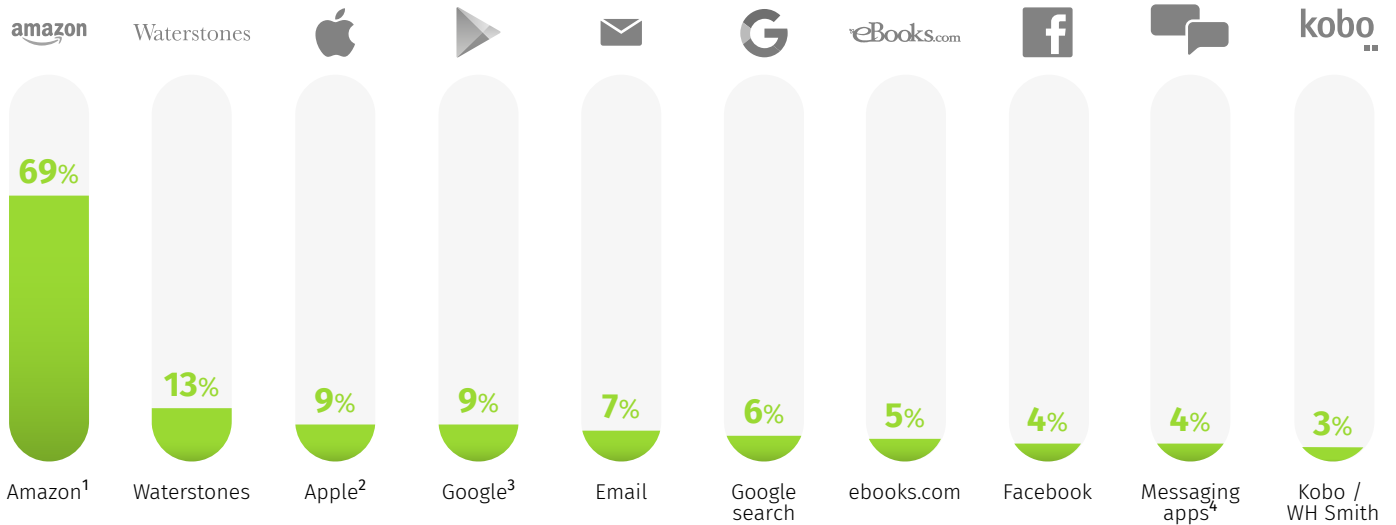
BOOKS

IN THE PAST THREE MONTHS



TOP 10 SOURCES USED

These are the main sources people used to download/access/share eBooks in the last three months (519 respondents)



MARKET

Total value of market ▶ **£0.6bn**

Physical:
£448M (79%)

Merchandise:
£80M (14%)

Digital:
£42M (7%)



INFRINGEMENT

Among consumers of the category

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



KEY POINTS

Most active:	Biggest source:	Infringers:
25-34 Year olds	69% Amazon / Kindle	12% of book consumers have infringed

1. Amazon / Kindle | 2. iTunes / iBooksStore / App Store | 3. Google Play / Android Marketplace | 4. etc. Facebook Messenger, WhatsApp

COMPUTER SOFTWARE

IN THE PAST THREE MONTHS

5.5M

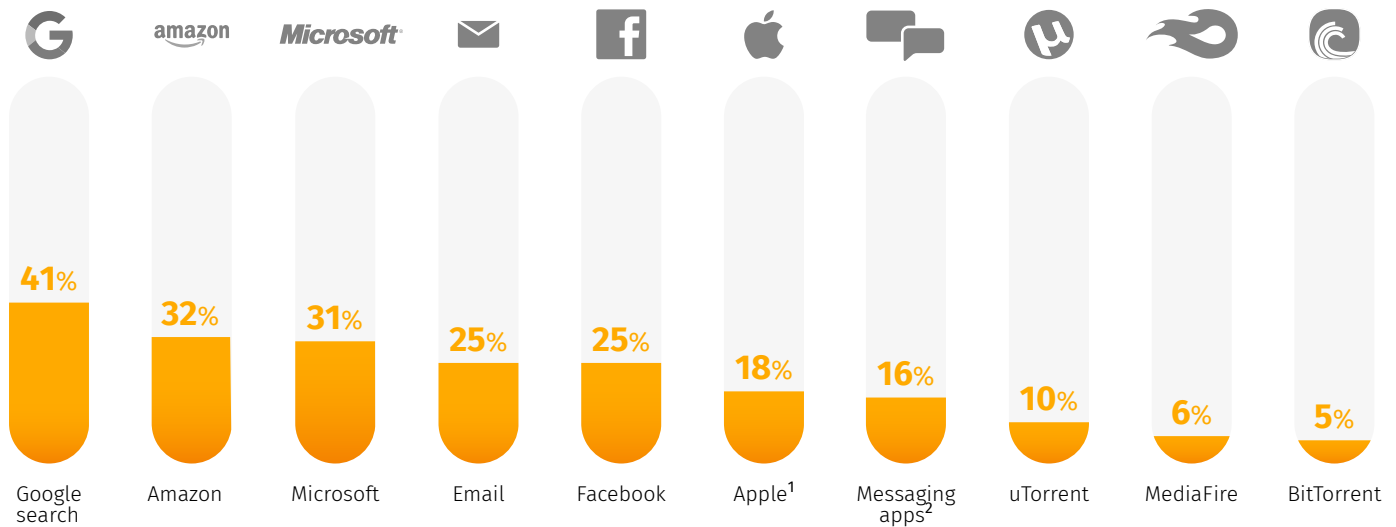
UK internet users have accessed computer software online...

3.4M
Accessed software online

3.9M
Downloaded software online

TOP 10 SOURCES USED

These are the main sources people used to download/access/share computer software in the last three months (593 respondents)



MARKET

Total value of market ▶ **£0.2bn**

Physical:
£151M (67%)

Digital:
£74M (33%)



INFRINGEMENT

Among consumers of the category

ANY ILLEGAL ACTIVITY



100% ILLEGAL ACTIVITY



KEY POINTS

Most active:	Biggest source:	Infringers:
16-24 Year olds	41% Google search	20% of software consumers have infringed

1. iTunes / App Store | 2. etc. Facebook Messenger, WhatsApp

VIDEO GAMES

IN THE PAST THREE MONTHS

6.4M

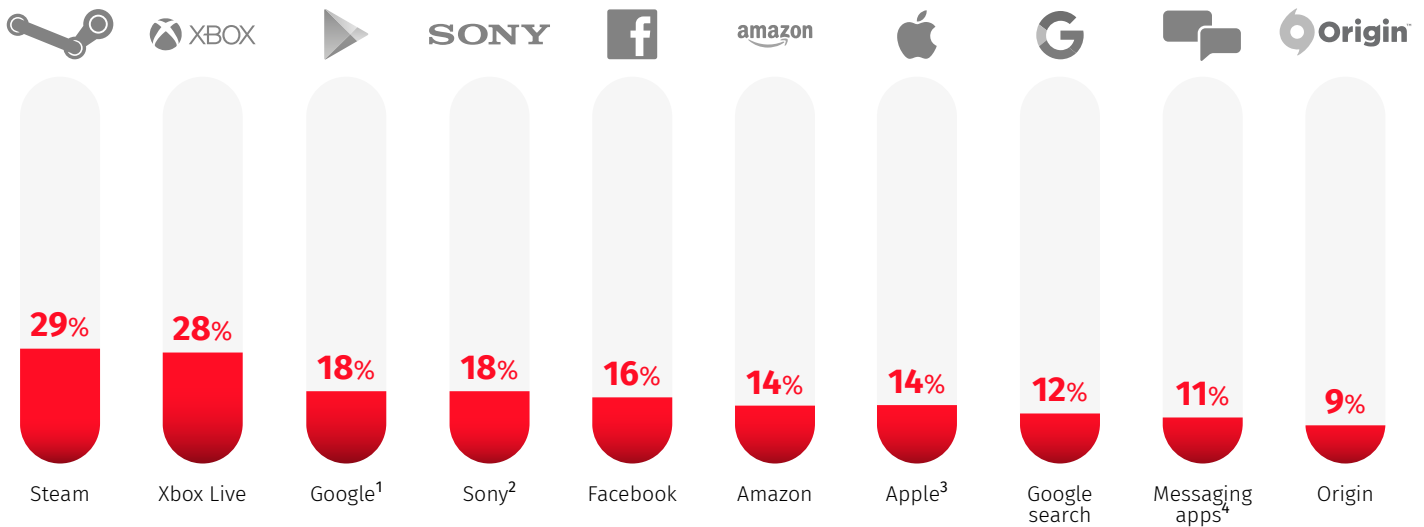
UK internet users have accessed video games online...

4.4M
Accessed video games online

4.2M
Downloaded video games online

TOP 10 SOURCES USED

These are the main sources people used to download/access/share video games in the last three months (784 respondents)



MARKET

Total value of market ▶ **£0.6bn**

Physical:
£379M (61%)

Digital purchases:
£146M (24%)

Merchandise:
£90M (15%)



INFRINGEMENT

Among consumers of the category

ANY ILLEGAL ACTIVITY

■ Mar 2018
■ Mar 2017

15%
16%

100% ILLEGAL ACTIVITY

9%
6%

KEY POINTS

Most active:	Biggest source:	Infringers:
12-15 Year olds	29% Steam	15% of video game consumers have infringed

1. Google Play / Android Marketplace | 2. Sony Entertainment Network
3. iTunes / App Store

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MEDIA