Intellectual Property Office

Online Copyright Infringement Tracker

Wave 5 (Covering period Mar 15 – May 15)

Overview and key findings

Research commissioned by the Intellectual Property Office and carried out by: Kantar Media.

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About Kantar Media

Kantar Media is a well established brand of trusted media analysts and advisors. We help the world s advertisers, media owners, advertising/media/PR agencies, and publishers together with government, NGO, and trade organisations to measure their media reputation and impact.

Kantar Media has a strong track record in researching and understanding about the copyright infringement area, having conducted the Illegal file sharing pilot for Ofcom in 2010 and three subsequent waves of the OCI tracker.

About the author of this report:
Euan Mackay, Director, Kantar Media

Euan has extensive experience in media research experience. He is a regular conference speaker, having spoken at the 2013 MRG annual conference at Bafta, at the WARC conference at Lords in April, was elected as a top 10 speaker at the ARF Rethink: 2014 conference in New York City in May. Additionally he spoke (and was voted runner up in the best speaker category) at the MRG international conference in Berlin last November.

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Any enquiries regarding this publication should be sent to:

The Intellectual Property Office
Concept House
Cardiff Road
Newport
NP10 8QQ

Tel: 0300 300 2000 Fax: 01633 817 777

e-mail: information@ipo.gov.uk

This publication is available from our website at www.gov.uk/ipo

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Introduction

This report details the main findings of the fifth wave of a large-scale consumer tracking study into the extent of online copyright infringement, as well as wider digital behaviours and attitudes, among people aged 12+ in the UK. The study was commissioned and financially supported by the UK Intellectual Property Office (IPO). It is the fifth in a series of research waves intended to generate benchmarks and time series relevant to the access and use of copyright material online. It also outlines the background to the research and a detailed description of the methodology employed.

Researching copyright infringement and digital behaviours is complex. The ways in which consumers access and share copyright material online change regularly, and infringement levels, in particular, are notoriously difficult to measure. We have gone to extensive lengths to find the best way of securing meaningful and accurate results for this survey, including commissioning a methodological study and an independent peer review. These reports can be found at:

http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/filesharing/kantar.pdf

http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/filesharing/peer.pdf

Rather than focusing on one industry, the study looks at six main types of online content – music, film, TV programmes, books, video games and computer software – and for each of these assesses levels of infringement. These are then assessed within wider patterns of consumer behaviour and content consumption.

For this fifth research wave respondents were surveyed during the period of March to May 2015 and asked about their behaviour during "the past three months". Reference to the figures from the previous wave (W4, covering the period March to May 2013[1]) are made where statistically significant changes have occurred. In some cases references are also made to the previous waves. In this fifth wave we have also conducted 10 qualitative interviews amongst infringers. The role of these interviews is to gain more in-depth understanding of the motivations and attitudes for using unlawful services online. The details about these interviews are covered in the technical appendix section and the findings from these interviews are stated in relevant sections in this report.

1 Full details and results of previous waves can be found at http://stakeholders.ofcom.org.uk/market-data-research/other/telecoms-research/copyright-infringement-tracker/ (W1) and http://stakeholders.ofcom.org.uk/market-data-research/other/telecoms-research/copyright-infringement-trackerw2/(W2) http://stakeholders.ofcom.org.uk/market-data-research/other/telecoms-research/copyright-infringement-trackerw3/ (W3) http://stakeholders.ofcom.org.uk/market-data-research/other/telecoms-research/oci-wave4/ (W4).

Key findings

- This report presents the main findings of the fifth wave (W5) of our consumer tracking study into online copyright infringement. The key findings are as follows:

General digital content consumption

- Sixty-two per cent of UK internet users aged 12+ consumed at least one item of online content[2] (legally or illegally) over the three-month period March-May 2015. Forty-two per cent had downloaded content, and 57% had streamed or accessed content. The streaming activity has grown significantly from previous waves. This is the highest level of streaming or accessing content online we have seen to date.

- Consumption varied across content types; music (35%) and TV programmes (34%) had the highest levels either downloaded or streamed online in the past three months, followed by films (22%), books (12%), computer software (12%) and video games (12%). The overall consumption level has risen from the previous wave, mainly driven by the growth in the film category.

Payment

- Over half (56%) of those who consumed any type of content during the past three months, paid for at least some of it. This remains stable, with no change in paid and free consumption of content from the past wave (W4).

- Just over a quarter (27%) of 12+ UK internet users accessed content entirely for free, this proportion has increased slightly from Wave 4 (25%) but not significantly.

- These increases reflect slightly higher consumption levels during W5 compared to W4, and a stable proportion of 12+ UK internet users consuming a mix of paid and free content (23% in W4 and 24% in W5).

- In terms of those who accessed individual content types, there was a small but significant decrease in the proportion who watched online TV programmes for free from 93% during W4, to 87% in W5. This is driven by an increase in those who paid for all content from 7% in wave 4 to 15% in wave 5.

2 'Online content' refers to any of six types – music, films, TV programmes, computer software, books and video games.

Levels of infringement

- We estimate that 18%, (equating to approximately 7.8 million) of UK internet users aged 12+ consumed at least one item of online content illegally over the three-month period March-May 2015. And 6% of the 12+ UK internet users have exclusively consumed illegal content. There have been significant changes in this proportion since W4.

- Levels of infringement varied significantly by content type; 9% consumed at least some music illegally over the three-month period, while 7% did so for TV programmes and 6% for films. For computer software, video games and ebooks these figures were 2%, 2% and 1%, respectively.

- If instead of looking at 'all internet users aged 12+' we use a base of 'all internet users who consumed content online over the three-month period', we found that 31% consumed at least one item illegally. Furthermore, 25% of those who consumed film, and 26% of those who consumed music, did so illegally, while the lowest incidence of illegal consumption was among online book consumers (10%).

- The proportion of all internet users aged 12+ who consumed content exclusively legally has decreased slightly for this wave from W4 from 40% in W4 to 39% in W5.

Demographics

- Across all content types, those who downloaded or streamed illegally were skewed towards males (59%), those under 35 (66%), and ABC1s (54%). Although the age and social grade balances reflect those who consumed digital content online in general (whether lawfully or not), there were noticeable differences for non-infringers – who were more likely to be female (51%), over 34 (57%), and were even more likely to be ABC1 (67%).

Volumes of infringement

- Music was by far the most-consumed content type, both digitally (343 million tracks) and physically (96 million tracks) over the three-month period. There is a notable increase in digital volumes from 319 million in W4. Further, we estimate that 96 million music tracks were accessed illegally online. This category has the highest volumes and infringement across the categories tested. Despite this, we do see a decline in the level of infringement since last wave.

- Films and TV programmes are the other categories where digital volumes have shifted from the previous wave. Films volumes have declined from 81 million in wave 4 to 79 million this time. However the volume of TV programmes has increased from 98million in 2013 to 135million this wave.

- In the TV programme category infringement levels have raised from 12million in the previous wave to 16million this wave.

- The ebook category has the lowest level of infringement with only 6% of category users accessing illegal content.

Services used for consuming online content

- Twenty-six per cent of those who consumed any content illegally claimed to use ‘peer-to-peer’ (P2P) services, compared to 6% of those who only consumed legally. This is the lowest level seen since the first wave in 2012 (it was 32% in W4).

- Of the individual peer-to-peer services used, uTorrent had the highest penetration - 17% of infringers claimed to have used it in the past three months.

- However, many licensed[3] content services were also used by a significantly higher proportion of infringers than non-infringers; for example: YouTube, Spotify, Netflix and Amazon.

- Netflix use increased significantly among infringers from 13% in wave 4, to 21% for W5, whistle Spotify use remained stable among this group, at 14%. In contrast, the use of Apple’s online products (iTunes or App store) has declined from 26% (W4) to 19% (W5).

Spend

- The proportion of 12+ individuals in the UK who spent money on at least one of the categories we analysed ranged from 10% for software to 44% for films. Average quarterly spend ranged from £6.68 for TV programmes to £20.28 for music.

- For both music and films, spend on ‘other’ (which included cinema/concerts and merchandise) was substantially higher than spend on physical and digital content.

- For four of the six categories, those who consumed a mix of legal and illegal content claimed to spend more on that particular content type over the three-month period than those who consumed either 100% legally or 100% illegally. The ebook infringer base was too low to analyse.

3 Note that unlawful activities are possible on some of these services (such YouTube, iTunes, Google Play, etc).

Reasons for infringing

- The most commonly cited reasons for infringing were because it is free (49%), convenient (43%) and quick (37%). Other reasons such as "can try before they buy" have fallen significantly amongst all infringers from 27% in W4 to 17% in this wave. There are also notable declines in reasons such as "can't afford to pay" and "think legal content is too expensive".

- The proportion claiming to have consumed content illegally because they had already paid to see it (e.g. a movie in the cinema or live music) has fallen significantly, from 14% in W4 to 7% in W5.

What would make infringers stop?

- The top three factors that infringers said would encourage them to stop included the availability of cheaper legal services (25%), if everything they wanted was available legally (21%), and if it was clearer what is legal and what is not (21%). All factors were mentioned by a higher proportion of those who consumed a mix of legal and illegal content than by those who consumed content exclusively illegally. Only 14% of those who consumed illegal content exclusively stated that nothing would encourage them to stop.

- Fifteen per cent of infringers indicated that they would be put off 'if my ISP sent me a letter saying they would suspend my internet access', falling to 11% for 'if my ISP sent me a letter informing me my account had been used to infringe', and 10% for 'if my ISP sent me a letter saying they would restrict my internet speed'.

- Responses to the threat of ISP letters were all at lower levels than they had been in previous waves; the suspension of internet service in particular has fallen by a small proportions wave-on-wave (from 22% in W1, 18% in W2, 16% in W3 and 14% in W4 to its current level of 15%).

Levels of consumer awareness in legal services and confidence about what is and is not legal online.

- Lack of confidence about what is and is not legal online appeared more prevalent among females (46% v 33% of male) and C2DEs (43% v 38% of ABC1), i.e. those less likely to participate in all forms of online activity (legal and illegal). A lack of confidence generally increased with age beyond 34, however 12-15 year olds (37%) showed similar levels of confidence to 35-44 year olds (40%).

- The proportion of people claiming to be 'not at all confident' in what is and is not legal online has increased slightly; from 15% in W4 to 17% in W5.

1. Research overview

1.1 Background and objectives

The Digital Economy Act (DEA) 2010[4] extended IPO's remit to include new duties related to online copyright infringement. The DEA requires IPO to establish a code setting out the rules for a scheme, whereby internet service providers (ISPs) must notify their subscribers of allegations made by copyright owners that their account has been used to infringe copyright. Once the scheme is operational Ofcom must report to the Secretary of State, on progress in reducing levels of infringement.

In May 2011, the Hargreaves Review of Intellectual Property and Growth recommended that Ofcom should not wait until the DEA scheme was up and running to begin gathering data and establishing benchmarks on online copyright infringement[5]. The Government adopted this recommendation and, as a result, the Intellectual Property Office agreed to fund Ofcom to conduct research into online copyright infringement, in order to gather initial evidence and trends that could be used to assist policy making.

In 2012, Ofcom commissioned Kantar Media to conduct a tracking study covering behaviour and attitudes towards both lawful and unlawful online use of copyright material across several content types. This study was funded by the IPO. However this year (2015) IPO commissioned and managed this project with Kantar Media.

The table below sets out the wider overall aims of the research, along with the specific research objectives and associated metrics:

Overall Aim	Research Objective	Metrics
Establish the current level of subscribers' use of internet access services to infringe copyright.	• Measure online copyright infringement levels (alongside lawful activity) among UK consumers, and monitor changes on a quarterly basis.	• Whether accessed/ downloaded/ shared files (ever, past three months) by content type. • Frequency per content type. • Volume per content type. • Proportion of type paid for and free. • Proportion of files believed to have been legally accessed (from which a figure for illegal files can be derived).

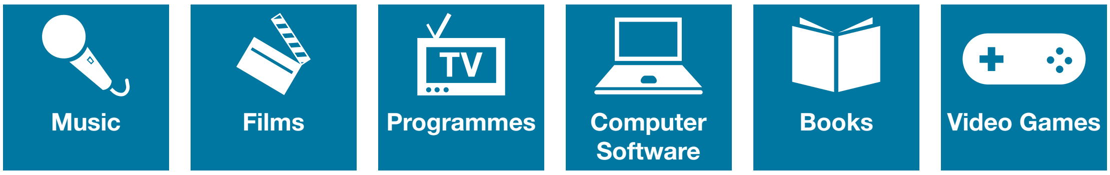
4 http://www.legislation.gov.uk/ukpga/2010/24/contents
5 http://www.ipo.gov.uk/ipreview.htm http://www.ipo.gov.uk/ipresponse-full.pdf

Overall Aim	Research Objective	Metrics
Describe and assess the steps taken by copyright owners "to inform, and change the attitude of, members of the public in relation to the infringement of copyright" and "to enable subscribers to obtain lawful access to copyright works."	• Gain deeper understanding of attitudes towards copyright infringement. • Monitor awareness and effectiveness of educational campaigns. • Assess awareness and attitudes towards availability of lawful alternatives.	• General attitudes. • Key drivers of behaviour. • Why people do /don't infringe. • What would make them stop? • Awareness/use of lawful services. • Reasons why do/don't use lawful services. • Understanding of what is legal.
Better understand the role that pricing plays in the lawful and unlawful access of online content.	• Measure spend on recorded and digital media to analyse potential impact of unlawful file-sharing on purchase of related content (positive and negative). • Explore willingness to pay and optimum pricing for different content types.	• Current spend on relevant material. • Willingness-to-pay modelling.

1.2 Research notes

Content types and activities assessed

Within this study we sought to provide measurements for six core content types of interest:



The questions we asked were primarily focused around the following online activities, explained to each respondent as follows:

- **Streamed or accessed:** By this we mean that you viewed, listened to or played content directly through the internet without downloading a copy. For example, watching TV programmes on BBC iPlayer or listening to music through services such as Spotify.

- **Downloaded:** By this we mean that you transferred a copy of the file to your device. For example, downloading a music track to your computer through iTunes or Amazon.

- **Shared:** By this we mean that you made the file publicly available, or sent or uploaded it online for someone else to download or stream/access. For example, sharing files on your computer through an online service. This does not include sharing links online.

These categories all relate to what we term 'digital' content/files. However, certain metrics in this report also incorporate consumer spend attributable to 'physical' formats (e.g. CDs, DVDs, physical books, games and cartridges) to help locate the consumption of digital content in its wider context.

For most of the content types there are several elements that had the potential to cause confusion and thereby distort the figures if misinterpreted by the respondent. For example, there is a fine line between music tracks and music videos, and there is a distinct difference (in terms of number of digital files) between singles and albums. Similarly, for computer software and video games people may consider updates and patches as products in themselves. Therefore, we attempted to be as clear to respondents as possible in terms of what they should include in the definition. These are as follows:

Category	Definition for respondent
Music	Music tracks or albums (excluding online radio stations)[6]
Films	Films (full length)
TV programmes	TV programmes
Computer software	Computer software (excluding mobile phone apps, and patches/ upgrades to software already owned)
Books	ebooks
Video games	Video games (excluding patches and upgrades)

Key Metrics

With respect to assessing levels of copyright infringement for each content category, the approach is consistent throughout the survey; we filter down from general online behaviour towards the sensitive topic of infringement. Within each category, we outline key metrics at two levels:

1. **Respondent level:** For example, the total number and proportion of the UK population who undertook an activity such as downloading music.

2. **Volume level:** For example, the number of music tracks downloaded in the past three months, or the number of music tracks legally obtained.

6 'Music videos' and 'short video clips' were asked separately for the 'ever done' and 'done in past three months' questions to aid with the distinctions.

The key metrics throughout this report are summarised in the following table:

Topic	Respondent Level	Volume Level
Assessing levels of copyright infringement		
General behaviour	1. Ever done 2. Done in the past three months[7] 3. Frequency 4. Median volumes (past three months) among those who have done activity	
Payment	Proportion of the population who fit into the following derived groups in terms of volume of content consumed in the past three months: 1. 100% paid 2. Mix of paid and free 3. 100% free 4. Any free (combination of 2 + 3) 5. 100% already owned in physical format 6. Any already owned in physical format 7. None already owned in physical format 8. 100% previously downloaded for free (% of paid acquisitions across formats) 9. Any previously downloaded for free 10. None previously downloaded for free As well as the proportions of those who have done the activity in the past three months, metrics 1 to 4 are also reported among the total 12+ UK internet population, and include median volumes. Metrics 5 to 10 include mean volumes[8].	Paid and free proportions of total volume (incorporating physical format where relevant)
Legality	Proportion of the population who fit into the following derived groups in terms of volume of content consumed in the past three months: 1. 100% legal 2. Mix of legal and illegal 3. 100% illegal 4. Any illegal (combination of 2 + 3) As well as the proportions of those who have done the activity in the past three months, the above metrics 1 to 4 are also reported among the total 12+ UK internet population and include median volumes.	Legal and illegal proportions of total volume (incorporating physical format where relevant)

7 The past three months was decided upon as the primary time-based metric for this study. Although this might have repercussions regarding respondents' ability to recollect past behaviour accurately, it was chosen for two reasons - 1) it ties in with the future quarterly DEA reporting requirement, and 2) it is intended to avoid bias in the data caused by seasonality (especially regarding the Christmas period).

Assessing consumer spend on categories and price sensitivity		
Spend	Proportion of population who have spent anything (and average spend in the past three months) on digital subscriptions, individual digital downloads, physical formats and other related areas such as gigs or cinema.	Total volumes and proportions of overall spend
Price sensitivity	Willingness to pay (music, films and ebooks only) - For consuming individual files via a download service - For a subscription service (monthly charge)	

Subgroup analysis

For each category the report details the main findings, followed by significant differences of interest (at the 95% level[9], unless indicated otherwise) compared to W4 results, among the following groups:

Category	Subgroups
Gender	Male, Female
Age	12-15, 16-24, 25-35, 35-44, 45-54, 55+
Socio-economic group (16+ only)	ABC1, C2DE
Presence of children in the household	Yes (including under 15-year-old respondents), No

Trends

Throughout the report reference to the figures from the previous waves are made where significant changes have occurred in the results. Again this is assessed at the 95% level (unless otherwise stated) and is highlighted in the tables or charts where possible. Where significant changes have occurred, an attempt is made to explain why they may have occurred; in some cases this might be partly attributed to changes in the survey design (such as question wording).

8 See THE LIMITATIONS OF CLAIMED BEHAVIOUR AND DATA RECONCILIATION on page 12.

9 In statistics, a number that expresses the probability that the result of a given experiment or study could have occurred purely by chance. This number can be a margin of error ("The results of this public opinion poll are accurate to five per cent"), or it can indicate a confidence level ("If this experiment were repeated, there is a probability of ninety-five per cent that our conclusions would be substantiated"). Source: Dictionary of Cultural Literacy.

The limitations of claimed behaviour and data reconciliation

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, industry sales and revenue data, internet audience analysis and direct measurement of online activity (for example, by monitoring activity on file-sharing networks). On their own, none of these sources presents a complete picture of the market, and each has strengths and limitations.

Data in this report (particularly consumption volumes and consumer spend) are not directly comparable to published industry sales data. Wide variations in notionally similar figures should be expected for many reasons, including:

- Differences in methodological approach
- Extent of market coverage
- Seasonality and timing of research
- Inclusion or otherwise of VAT
- Differences between consumer spend and sales receipts
- Inclusion of sales of second-hand material

It is also particularly important to note that figures in this report are based on the 'claimed' numbers collected from a random sample of people in this survey. These data were then grossed up to reflect the UK 12+ population. There was a wide variance in the numbers and this reflects the behaviour indicated by a subsection of the UK population 12+ within the time periods asked about.

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 gone to significant lengths to ensure that honesty was encouraged (to ensure that the data collected were as accurate as possible) by using indirect lines of questioning when calculating unlawful activity. These measures are discussed in more detail in the technical appendix (Section 4) of this report.

Reporting averages and the issue of outliers

When reporting on average volumes consumed (or shared) certain metrics are reported differently for this study. The two types of averages used are:

The **median** - the middle value in a sample sorted into ascending order.

The **mean** - the grand total divided by the number of data points.

For core metrics covering average volumes of files downloaded/streamed, paid for/obtained free, and obtained legally/illegally in the past three months, we report only on medians. The reason for this is that due to the nature of online behaviours, and the continuous scale for responses to these questions, the resultant mean scores are highly influenced by a few respondents with high levels of activity. As a result the mean volumes are noticeably volatile from one wave to the next for all content types covered, reducing the confidence with which we can infer trends for these figures. Alternatively, if we were to exclude outliers from the mean calculations this would ignore valid data from possible enthusiasts and hence cause a different issue. The median (middle number), on the other hand, has proved to be much more stable for these metrics.

For the two metrics covering physical ownership of digital content consumed, and the previous free consumption of paid-for content, we revert to the standard mean. The reason for this is that, in contrast to the above, the mean has remained stable from one wave to the next for these metrics. Furthermore, the median is zero in all cases, as the majority of those who consumed content online in the past three months didn't already own any in physical format, or previously consume paid-for content for free. Therefore, there is little value in reporting on the median here.

2. Cross-category overview

2.1 Digital content consumption

This section provides a summary of the key metrics and findings from the current wave of research (as described in Section 1.2).

2.1.1 Digital behaviour among internet users aged 12+ across all content types

The following table outlines the proportion of internet users aged 12+ who downloaded, streamed/accessed, or shared content for each of the six content types. The 'any' column is an aggregation across all of the content types (for example, if someone downloaded and streamed both music and films they would be counted only once within the overall proportion):

Table 2.1.1a: Digital behaviour among internet users aged 12+ – all content types

↑ Sig. increase (from W4)
↓ Sig. decrease (from W4)

		Music	Films	Programmes	Computer Software	Books	Video Games	Any
Base: all internet users 12+		4552	4552	4552	4552	4552	4552	4552
Download	Ever done	34%↓	14%	15%↑	15%	15%	13%	51%
	Past 3 months	24%	9%	9%	9%	11%↓	8%	42%↑
Stream or access	Ever done	37%	27%↑	40%	12%	9%	12%	64%↑
	Past 3 months	27%	20%↑	32%	5%	6%	8%	56%↑
Share	Ever done	8%↑	3%↑	3%↑	2%	1%	3%	18%↑
	Past 3 months	6%	2%	2%	1%	1%	2%	13%↑
Download or Stream/ access i.e. Consumed	Ever done	46%	30%↑	42%	20%	18%	17%	69%↑
	Past 3 months	35%	22%↑	34%	12%	12%	11%	62%↑
Download, Stream/ access, or Share	Ever done	46%	31%	43%	20%	18%	18%	69%↑
	Past 3 months	35%	22%	34%	12%	13%	12%	62%↑

- There has been an overall increase in online activity to 69% since last wave in Mar-May ’13. This rise is mainly driven by the growth in streaming activities (64%).

- Sharing of content has also increased and is mainly led by growth in sharing of music, films and TV programme content compared to the past wave. However sharing remains a niche activity.

- Music continues to be the most downloaded content type of the six we explored; 34% of internet users had ever downloaded music, and a quarter had done so in the past three months.

- TV programmes were the most commonly streamed type, with 40% having done so ever, and 32% having done so in the past three months.

- The online consumption level of smaller content categories such as computer software, ebooks and video games has remained broadly stable for streaming and accessing/ sharing content. Whereas ebooks downloaded in the past three months has dropped significantly compared to the previous wave.

The following table outlines the **median** volumes of files downloaded, streamed/accessed or shared in the past three months (among those who had done each activity). The ‘any’ column shows aggregations across all three activities:

Table 2.1.1b: Median number of files among 12+ internet users who consumed content (past three months)

↑ Sig. increase (from W4) ↓ Sig. decrease (from W4)	Music	Films	Programmes	Computer Software	Books	Video Games	Any
Base*	1247	470	489	437	537	415	2013
Downloaded	10	3	5↑	2	4	2	9
Base*	1425	1014	1590	320	287	420	2492
Streamed/ accessed	20	5	7↑	2	3	3	15↑
Base*	311	104	96**	78**	55**	102	454
Shared	3	2	2	2	2	2	3
Base*	1808	1122	1693	578	613	618	2843
Downloaded or Streamed/ accessed i.e. Consumed	20	5	9↑	3	5	4	20↑

*All bases are among those who had done each activity in the past three months
** Caution: bases lower than 100.

- Generally, the median figures have remained relatively stable across the content types since W4. The exception was TV programmes, where the number of streamed TV programmes increased significantly since wave 4, from 5 to 7. Even the downloading of TV programmes increased from 3 programmes in W4 to 5 programmes in current wave. Similarly the median number of TV programmes consumed overall (i.e. including both streaming and downloading) has also increased. This gave TV programmes the highest median consumption level since 2012.

2.1.2 Payment groups

We categorised people according to the proportion of digital content that they claimed to have paid for; we refer to these categories as 'payment groups'.

The following table shows the incidences for each payment group in terms of content accessed in the past three months, across two different bases:

- Base 1 - all who downloaded or streamed/accessed each content type in the past three months

- Base 2 - all internet users aged 12+

We have included this second base because the proportion of people active in each category varies between content types; looking at payment categories across the 12+ internet universe allows us to make comparisons between them.

Table 2.1.2: Payment groups – proportion who paid to consume content or did so for free (past three months)

↑ Sig. increase (from W4) ↓ Sig. decrease (from W4)	Music	Films	Programmes	Computer Software	Books	Video Games	Any
Base 1 - all who consumed	1808	1120	1693	577	613	615	2834
100% Paid	27%	35%	15%↑	24%	47%	36%	13%
Mix of Paid and Free	23%	17%	11%↑	17%	22%	24%	43%
100% Free	50%	48%	76%↓	59%	31%	40%	44%
ANY PAID	50%	52%	25%↑	41%	69%	60%	56%
ANY FREE	73%	65%	87%↓	76%	53%	64%	87%
Base 2 - 12+ internet users	4552	4552	4552	4552	4552	4552	4552
100% Paid	9%	8%↑	5%↑	3%	6%	4%	5%
Mix of Paid and Free	8%	4%	3%	2%	3%	3%	24%
100% Free	17%	11%	26%	7%	4%	5%	27%
ANY PAID	17%	12%	8%↑	5%	9%	7%	29%↓
ANY FREE	25%	15%↑	29%↓	9%	7%	8%	51%

Base 1: All who have downloaded or streamed/accessed types of content in the past three months
Base 2: All internet users (aged 12+)

- TV programmes had the highest incidence of free consumption across the content types, equating to little less than a third of the 12+ internet population. The free consumption of TV programmes has declined significantly from the previous wave (from 32% W4 to 29% W5). However, this decline is offset by the increase in paid TV programmes consumption. A quarter of those who access TV programmes online have paid for the content. This has increased from 15% (W4) to 25% in this wave.

- Across all content types, and among all internet users aged 12+, the 'mix of paid and free' group remained stable and to the same levels as seen in W2 (23%). There was a small uplift in the percentage who consumed content for free (from 48% to 51%). However, this is not significant. The uplift in free content was mainly driven by Films category.

- Of those who downloaded or accessed music content of any type during the past three months, the great majority (73%) consumed at least some of it for free[10].

- All content types except TV programmes have seen no significant fluctuations over the time period.

- More e-book consumers paid for some content (69%) and for all of their content (47%) than consumers of any other content type.

2.1.3 Existing ownership, and free access to digital content before purchasing

- The following table displays a summary of key metrics about prior ownership in physical format of content consumed online in the past three months.

Table 2.1.3a: – Prior physical ownership of content consumed in the past three months

↑ Sig. increase (from W4)
↓ Sig. decrease (from W4)

	Music	Films	Programmes	Computer Software	Books	Video Games	Any
Base*	1808	1122	1693	577	613	615	2843
100% owned in physical format	4%↑	3%	2%	6%	2%	6%	2%
Any owned in physical format	26%	19%	10%	17%	14%	23%	30%
None owned in physical format	70%	78%	88%	77%	84%↑	71%	68%
Mean number	12	1	3	2	1	3	12

*All bases are among those who had done each activity in the past three months
*Mean number is the average number of items physically owned prior to purchasing content online in the past three months

10 Note that 'free' does not necessarily mean that the content was consumed 'illegally'.

- Physical ownership of content consumed online in the past three months has significantly changed only in the Music category since W4. Little more than a quarter (27%) of those who consumed any content in the past three months, already owned some of it in physical format.

- Consumers of music (26%) and video games (23%) were most likely to claim ownership of physical copies of at least some of the content they had consumed online in the past three months.

- The overall majority of consumers (68%) do not own content in any physical format before consuming it online.

The following table shows the proportion of people who claimed to have previously consumed content online for free which they went on to pay for (in either digital or physical format).

Table 2.1.3b: Consuming online content for free before purchasing in the past three months

↑ Sig. increase (from W4)
↓ Sig. decrease (from W4)

	Music	Films	Programmes	Computer Software	Books	Video Games	Any
Base*	1523	1520	1054	668	2046	1018	5192
100% previously consumed for free	14%	9%	20%	24%	7%	13%	2%
Any previously consumed for free	34%	20%	32%	42%	14%	29%	16%
None previously consumed for free	66%	80%	68%	58%	86%	71%	84%
Mean number	12	1	3	2	1	1	5

*All bases are among those who had paid for types of content (physical or digital) in the past three months
*Mean number is the average number of items consumed online for free before purchasing in the past three months

- The percentage of those who had previously consumed paid-for content for free has remained stable across all the categories with no significant changes since previous wave.

- Across the content types, the majority (84%) of the content that is paid for online was not consumed for free previously.

- The percentage of those who consumed 100% of the content for free before purchasing was highest for the computer software category (24%) and TV programmes category (20%).

2.2 Levels of copyright infringement

2.2.1 Legality groups

As with the payment group metrics outlined in Section 2.1.2, we can create 'legality' groups by assessing the proportion of online content they each consumed legally[11]:

Table 2.2.1a: Legality groups – proportion who consumed content legally/illegally (past three months)

↑ Sig. increase (from W4)

↓ Sig. decrease (from W4)

	Music	Films	Programmes	Computer Software	Books	Video Games	Any
Base 1 - all who consumed	1808	1122	1693	578	613	618	2843
100% legal	74%	75%↑	79%	80%	89%	82%	69%
Mix of legal and illegal	11%	9%	7%	7%	4%	8%	22%
100% illegal	15%	16%↓	14%↑	14%	6%	10%	10%↑
ANY ILLEGAL	26%	25%	21%	20%	11%	18%	31%
Base 2 - 12+ internet users	4552	4552	4552	4552	4552	4552	4552
100% legal	26%	17%↑	27%	10%	11%	9%	39%
Mix of legal and illegal	4%	2%	2%	1%	1%	1%	12%
100% illegal	5%	4%	5%↑	2%	1%	1%	6%
ANY ILLEGAL	9%	6%	7%	2%	1%	2%	18%

Base 1: All who have downloaded or streamed/accessed types of content in the past three months
Base 2: All internet users (aged 12+)

- Overall, the proportion of 12+ internet users who infringed remained similar to W4, at 18%. However, among any content consumers there has been a significant increase in the proportion of consumers who are accessing 100% illegal content from 8% (W4) to 10% for the current wave.

- The growth in access to illegal content among the category users is mainly driven by access to illegal content in the TV programmes category (from 11% in W4 to 14% for W5).

- On the other hand, there has been a significant decline in illegal content access in the films category from the previous wave (from 21% in W4 to 16% for the current wave).

- In the other categories there are no major changes in the level of infringement. We continue to see highest level of infringement in the music category (26%), closely followed by the films category with 25% of any illegal content.

11 We derived figures for illegal files by looking at differences between claimed total number of files with claimed number of files obtained 'legally' in the past three months. Illegal streaming activity is defined as content that has not been accessed or streamed from legal sources

Table 2.2.1b shows the demographic profile of 'any illegal' (infringers) versus '100% legal' (non-infringers):

Table 2.2.1b: Demographic profiles of infringers versus non-infringers

		All content consumers	Any illegal (Infringers)	100% legal (non-infringers)
	Base	**2843**	**762**	**1171**
Gender	Male	53%	59%	49%
	Female	47%	41%	51%
Age	12-15	9%	10%	8%
	16-34	45%	56%	35%
	35-54	32%	25%	35%
	55+	14%	10%	22%
Socio-economic group[12]	ABC1	67%	54%	67%
	C2DE	33%	46%	33%

Base: All who have downloaded or streamed/accessed any content type in the past three months (2843)

- Across all content types, those who downloaded or streamed illegally were skewed towards males (59%) and those under 35 (66%). Non-infringers were more likely to be female (51%), over 34 (57%), and ABC1 (67%) than infringers.

- We also looked at the penetration levels among demographic groups and we noticed higher level of infringement among lower SEC C2DE (16%) compared to SEC ABC1 (7%).

The following table shows the median number of items downloaded or streamed illegally, split out by the legality groups:

Table 2.2.1c: Legality groups – median content items consumed illegally in the past three months

	Music	Films	Programmes	Computer Software	Books	Video Games	Any
Base:	457	341	337	123	72*	114	762
100% illegal	11	3	4	2	**	2	6
Any illegal (Infringers)	20	6	8	4	6	3	21

Base: All who have downloaded or streamed types of content illegally in the past three months
*Caution low base (under 100). **Bases too small to analyse further (under 50)

12 Socio-economic group is not included for 12-15 year olds, so this profile is among 16+ year olds.

- Across all content types the median number of files downloaded or streamed illegally among those who had done so was twenty one.
- Median volumes were highest for music (20 tracks), while computer software and video games were lowest (four and three).

The following table shows the incidence of services used in the past three months to consume or share any type of content. It compares infringers ('any illegal') with non-infringers ('100% legal').

Table 2.2.1d: Use of services for consuming or sharing content in the past three months

↑ Sig. increase (from W4) ↓ Sig. decrease (from W4)	All who consumed or shared content in past 3 months	Any illegal (infringers)	100% legal (non-infringers)
Base	2864	762	1171
YouTube	50%	63%	41%
BBC iPlayer	37%↓	33%	39%
Amazon/ Amazon mp3/ Kindle	35%	27%	29%
iTunes/ App Store/ iBookstore/ Apple Store	23%	19%	13%
ITV Player	18%	16%	18%
4OD	17%	17%	15%
Facebook	22%	30%	14%
Google (Search Engine)	19%	26%	17%
Spotify	16%	14%	11%
Email	13%	18%	9%
Netflix	24%↑	21%↑	14%↑
Lovefilm	4%	3%	2%
Sky Go	9%	8%	7%
uTorrent	7%	17%	3%
Demand 5	7%	6%	7%
Google Play/ Android Marketplace	8%	9%	4%
Microsoft	6%	5%	5%
BitTorrent software	4%	10%	1%
Peer-to-peer (NET)[13]	**12%**	**26%↓**	**6%**
Cyberlockers (NET)[14]	**4%**	**9%**	**1%**
Mean number of services used	**4.0**	**5.6**	**3.4**

Base: All who have downloaded, streamed/accessed or shared any of the six content types in the past three months (2864)

13 Peer-to-peer (net) comprises Bittorrent software, uTorrent, Pirate Bay, Isohunt, Limewire, eDonkey/eMule, Gnutella, KickAssTorrents, Torrentz, and Sopcast.

14 Cyberlockers comprises Rapidshare, MediaFire and YouSendit.

- Half of those who consumed or shared any content online in the past three months used YouTube, followed by the BBC iPlayer and Amazon services. BBC iPlayer service usage has declined from 44% to 37% since the last wave in 2013 but remains an important source, particularly for the non-infringers.

- Netflix services see the most significant increase in usage among all the groups. A quarter of those who consumed or shared any content online in the past three months used this service. Furthermore, nearly a quarter of infringers (21%) used Netflix.

- Use of Peer2Peer (P2P) was higher among infringers (26%), but the levels have dropped since the last wave and it is currently at the lowest level seen so far (it was 32% in W4).

- uTorrent was still the most-used ‘unlicensed’ service, as it has been since W1 - 17% of infringers claimed to have used it in the past three months. ‘Cyberlockers’ were used by 9% of infringers. There have been no changes in the level of ‘unlicensed’ service usage amongst infringers.

- Those who infringed used 5.6 services on average, compared to 3.4 for those who consumed 100% legally.

2.2.2 Qualitative findings about the services used across categories

The following findings are from the qualitative in-depth interviews where we asked respondents about the reasons for using various official and unofficial services across categories.

Use of official services in Music, Films and TV programmes categories:

YouTube was a popular source used amongst infringers interviewed in the qualitative phase. It is often the ‘go to’ source for discovering music. The ads that appear on this channel are percieved to be annoying but consumers are willing to use it because it is free. YouTube is also used to find old TV series’ which are often unavailable on other sources. There were also references to use for accessing entire films though these tended not to be new releases. Consumers see little risk in viewing content on YouTube, even that which may be illegal as they consider it is YouTube’s responsibility to not publish any unofficial content.

This is illustrated by one respondents who said *“I prefer streaming things on Youtube rather than those illegal downloads. If it’s on Youtube then it’s obviously going to be strict. Finding Nemo is on there. Something like that would be taken off if it was illegal.”* (Response from a female respondent between the ages 25-29 years)

As we have seen from the quantitative findings Infringers are aware of official sources like Netflix but perceive it to have a limited content archive compared to other unofficial sources. It is seen to offer only selected series of some shows. The USA version is perceived as having a broader selection. To some extent there is a reluctance to subscribe to the service when content is freely available on other online streaming services. *"New stuff I don't watch through Netflix, because you have to wait. I can just stream it."* (Response from a male respondent from the age group 18-20 years)

Spotify was the other popular streaming service discussed in the interviews. Consumers (infringers) preferred using the free version of this service even though they find the adverts to be annoying and feel it has restricted features. However, again, they are willing to use the free version over the paid subscription option. They also consider this service useful as a means to trial tracks and albums.

The infringers also refered to downloader apps that can be used in smartphones and tablets like iTunes, Amazon music and Google play. However these apps were only used occasionally.

For TV programmes, consumers are also using TVCatch-up apps to watch live TV on various devices. There appeared to be some confusion around the legality of this service. However, those infringers we spoke to prefered using this service as it circumvents the effort of using individual broadcaster apps.

Use of unofficial services in Music, Films and TV programmes categories:

Unofficial services such as uTorrent, BitTorrent etc are used for downloading music tracks, films or TV programmes as they are cost-free and a large volume of content can be downloaded using these services. They are also seen as providing a wide choice including unreleased content. There are times when uncertainty of the quality and even the content that is being downloaded become an issue. Downloads from these services can be slow and need a lot of planning. Given that the content is generally seen to be freely available for downloading, infringers get frustrated when unofficial sites are blocked.

There were other unofficial streaming services such as Couch Tuner, Show Box, Coke and Popcorn which infringers claimed to use, generally increasingly to stream film and TV content. These services tended to be more popular with younger infringers. They consider these services for personal viewing in order to circumvent household preferences and often use them on their personal devices. These services were regarded as providing an acceptable quality of content for free. These streaming services were also seen as facilitating binge viewing as they provide vast archives that are not bound to single broadcasters or providers in the same way as legal alternatives are. Infringers also tend to use these services to view various shows that are broadcast only in the USA and so are not available, or have not yet been released in the UK. Such unofficial services are perceived to bridge the gap between cinema releases and the DVD/Pay TV window.

2.2.3 Content consumption volumes

Whilst metrics outlined so far have focused on results at an individual respondent level, the following table outlines total consumption volume estimates for each of the content types (in the past three months, rounded to the nearest million in each case[15]).

The volumes are calculated using the median scores as per the rationale set out previously in the research notes section.

Table 2.2.2: Volume of content consumed

Volumes are in millions		Total	Physical format	Digital format
Music	**Volume**	440m	96m	343m
	% of total	57%	22%	78%
Films	**Volume**	79m	22m	56m
	% of total	10%	28%	72%
TV Programmes	**Volume**	135m	15m	119m
	% of total	17%	12%	88%
Computer Software	**Volume**	18m	4m	13m
	% of total	2%	26%	74%
Books	**Volume**	77m	50m	26m
	% of total	10%	65%	35%
Video Games	**Volume**	21m	7m	13m
	% of total	3%	35%	65%
	Total	**772m**	**197m**	**574m**

15 Due to rounding (to the nearest million), not all figures e.g. paid + free will add up to the total exactly.

- Digital format consumption contributes to nearly three quarters of the overall volume (574m). The digital volumes have increased by nearly thirteen percentage points since 2013.

- The majority of content is consumed in digital format across all categories, except for ebooks where physical content (i.e. traditional books) outweighs digital.

- Music was by far the most-consumed content type, both digitally (343 million tracks) and physically (96 million tracks) over the three-month period. This was largely driven by the fact that we assessed individual tracks, not albums. There is a notable shift in digital volumes from 319 million in W4.

- Films and TV programmes are the other categories where digital volumes have notably shifted from the previous wave. The digital volumes for film has decreased from 81million for online films in wave 4 and TV programmes' volumes have increased from 98million.

Table 2.2.2a: Paid vs. free content in Digital formats

		Digital format	
Volumes are in millions		**Paid content**	**Free content**
Music	**Volume**	76m	267m
	% of total	22%	78%
Films	**Volume**	25m	31m
	% of total	45%	55%
TV Programmes	**Volume**	29m	90m
	% of total	24%	76%
Computer Software	**Volume**	4m	9m
	% of total	31%	69%
Books	**Volume**	15m	11m
	% of total	57%	43%
Video Games	**Volume**	9m	4m
	% of total	66%	34%

- Unsurprisingly there are big differences in paid and free content for the music, TV programmes and computer software, with free content volumes being much higher than paid content volumes, for all except video games.

- Higher proportions of free content within the digital format is seen for TV programmes, music and computer software categories. Whereas the proportion of paid content is higher in video games category followed by ebooks category.

- In terms of volume, free digital music content stands out with 267 million tracks consumed online for free.

- When compared to wave 4 the biggest shifts in free content volumes are also seen in the music, film and TV programmes categories. In wave 4 the digital free content volumes were 215 million, 27 million and 64 million, respectively.

Table 2.2.2b: Legal vs. Illegal content in Digital formats

Volumes are in millions		Digital format: Legal content	Digital format: Illegal content
Music	Volume	247m	96m
	% of total	72%	28%
Films	Volume	44m	12m
	% of total	77%	23%
TV Programmes	Volume	102m	16m
	% of total	86%	14%
Computer Software	Volume	10m	2m
	% of total	78%	22%
Books	Volume	25m	1m
	% of total	94%	6%
Video Games	Volume	17m	3m
	% of total	85%	15%

- We estimate that 96 million music tracks were accessed illegally online in the last 3 months. The music category has the highest volume and proportion of infringement compared to the other categories.

- We see that the ebooks category has a much lower level of infringement with only 6% of the category users accessing illegal content.

- The level of infringement has declined in the music and film categories from those seen in 2013. In the previous wave (conducted in March to May 2013), we found an estimate of 157 million tracks being accessed illegally in the music category which has now reduced to 96 million. In the film category we estimate 18 millions films were being illegally accessed which has also reduced to 12 million in this wave.

- However, in the TV programmes category infringement levels have risen from 12 million in the previous wave to 16 million in this wave.

- For the other categories the infringement levels remain stable since 2013.

2.3 Consumer spend

This section outlines the main findings for consumer spend across the six content types.

2.3.1 Quarterly consumer spend among 12+ year olds

The table below shows, at a respondent level, the average spend by content types in the past three months across a number of different means of expenditure. It also shows the proportion of the entire UK population (i.e. not just internet users) aged 12+ who claim to have spent any money on these items:

Table 2.3.1a: Average consumer quarterly spend among 12+ year olds – all content types

↑ Sig. increase (from W4)
↓ Sig. decrease (from W4)

	Music		Films		Programmes		Computer Software		Books		Video Games	
	Mean	%	Mean	%	Mean	%	Mean	%	Mean	%	Mean	%
Purchases/rentals in physical format	£4.67	19%	£4.51	21%	£3.53	14%	£3.98	9%	£8.09	34%	£6.91	14%
Individual digital purchases	£1.34	10%	£0.70	4%	£0.92	4%	£0.96	3%	£1.06	7%	£1.71	5%
Online Subscriptions	£1.90	5%	£1.17	6%			-	-	-	-	-	-
Other	£12.39	16%	£8.86	34%	£2.23	6%	-	-	£1.50	7%	£1.63	6%
TOTAL[16]	**£20.28**	**30%**	**£16.64**	**44%**	**£6.68**	**17%**	**£4.94**	**10%**	**£10.65**	**38%**	**£10.24**	**16%**

Mean is the average spend among all 12+ year olds in the UK % is the proportion of 12+ year olds in the UK who spent anything on the content type
Base: All 12+ year olds in the UK (5192)

- Across the six content types, music has the highest average spend per person in the UK aged 12+, at £20.28, ahead of film at £16.64.
- A higher proportion of people claimed to have spent money in the past three months, on films (44%) and books (38%) than on other content types.
- Nineteen per cent of those aged 12+ in the UK claimed to spend money on physical music (on CD, vinyl or tape) during the period, compared to 10% for digital music (downloaded or streamed). Average spend on physical products was substantially higher than on digital for all content types.
- For both music and film, average spend on ‘other’ (including cinema/concerts and merchandise) was substantially higher than spend on physical and digital content.

16 Note that the total percentages add to less than the individual percentages added together due to duplication i.e. if someone purchased in physical format and online they only count once.

- TV programmes (£6.68) and computer software (£4.94) had the lowest average spend across the six content types. The latter also had the lowest proportion of the population spending anything in the three-month period.

- There have been small changes in the average spend but none significant. The average spend has increased in the TV programmes category from £5.05 in W4 to £6.68 for the current wave, for ebooks, the average spend has shifted from £9.79 in the previous wave to £10.65 and in video games we see an increase from £8.35 in W4 to £10.24 for the current wave. The increase in TV programme category is mainly driven by the spend on ‘other’ (merchandise) whilst ebooks and video games change in average spend is a function of increase in the physical format spend.

The following table shows the average spend for each content type (see previous charts for details of spend coverage) among the legality groups:

Table 2.3.1b: Average consumer quarterly spend among legality groups – all content types

<table>
<tr><th></th><th>Music</th><th>Films</th><th>T
Programmes</th><th>Computer Software</th><th>Books</th><th>Video Games</th></tr>
<tr><td>100% legal</td><td>£45.90
(1351)</td><td>£21.14
(388)</td><td>£11.22
(1356)</td><td>£23.48
(455)</td><td>£27.34
(541)</td><td>£53.83
(504)</td></tr>
<tr><td>Mix of legal and illegal</td><td>£77.56
(195)</td><td>£54.35
(75*)</td><td>£22.94
(108)</td><td rowspan="2">£14.18
(123**)</td><td rowspan="2">£20.59
(72*)</td><td>£90.91
(52**)</td></tr>
<tr><td>100% illegal</td><td>£26.50
(262)</td><td>£21.20
(182)</td><td>£4.65
(229)</td><td>£9.68
(62**)</td></tr>
</table>

Bases for individual groups are included in brackets.
*Caution: base under 100
**Base too low to analyse individual legality groups (figures shown for ‘any illegal’)

- For five of the six categories, we noticed a decline in spend amongst those who consumed the content 100% illegally compared to previous wave. The music category is the only exception for this observation. The average quarterly spend has remained stable amongst infringers.

- In four of the six categories, those who consumed a mix of legal and illegal content claimed to spend more on that particular content type over the three-month period than those who consumed either 100% legally or 100% illegally. (For ebooks and computer software the sample size was too low to make a robust assessment).

Table 2.3.2: Total quarterly spend estimates – all content types[17]

↑ Sig. increase (from W4) ↓ Sig. decrease (from W4)	Music		Films		TV Programmes		Computer Software		Books		Video Games	
	Spend	%	Spend	%	Spend	%	Spend	%	Spend	%	Spend	%
Purchases/ rentals in physical format	£250m	23%	£241m	30%↑	£189m	53%↓	£213m	81%↑	£433m	76%	£370m↑	67%
Individual digital purchases	£71m↓	7%	£37m	5%	£49m	14%	£51m	19%↓	£56m	10%	£91m↑	17%
Online Subscriptions	£101m	9%	£61m	8%↑			-	-	-	-	-	-
Other	£663m	61%	£474m	58%↓	£119m	33%↑	-	-	£80m	14%	£87m↑	16%
TOTAL[8]	**£1,088m↓**		**£816m↓**		**£358m↑**		**£265m**		**£570m↑**		**£549m↑**	

Spend is the total amount spent across all 12+ year-olds in the UK
% is the proportion of the total spend attributed to the specific category
Base: All 12+ year olds in the UK (5192)

- Music had the highest overall quarterly spend across the content types, at an estimated £1,088m, followed by films (£816m). Spend on music in physical format during this period (£250m) was more than that generated from digital music (approximately £172m for individual purchases and online subscriptions combined).

- However, in absolute terms, the £172m spent on digital music was by far the highest digital spend across the six categories evaluated, compared to films (£98m), computer software (£51m), and video games (£91m). Digital spend was lowest on TV programmes, at £49m, followed by £51m for computer software.

- Spend on physical content was highest for books (£433m), followed by video games (£370m). In line with previous findings, TV programme had the lowest spend at £189m.

17 * Other includes: Music = Concerts/gigs (£607m 54%) Merchandise (£91m, 8%) Films = Cinema (£382m, 41%) Merchandise (£43m, 5%), Pay-TV purchases (£138m, 15%) TV programmes = Merchandise (£60m, 22%).

- The overall spend in the film category has dropped from the previous wave mainly driven by the decline in the 'other' (merchandise/cinema) spend. This is even though there has been an increase in both the physical and online subscriptions spend since the previous wave.

- The opposite holds true for the TV programmes category, the total spend in this category has increased since the last wave in 2013. This rise in spend is mainly driven by the 'other' (merchandise) spend increase and there has been a decline in the quarterly spend in the physical format.

- Out of all the categories, the video games category spends have grown significantly across all the formats i.e physical, online and other since the previous wave.

3. Attitudes towards digital activities and copyright infringement

3.1 Motivations for general online activities

The survey included several questions around consumer attitudes with a view to uncovering primary motivations for participating (and also not taking part, in the case of downloading) in the activities covered in the survey i.e. downloading, streaming/accessing, and sharing content.

The following tables show the ranked prompted responses amongst those claiming to have participated in these activities in the past three months. We have included only those answers that gained a response rate of 4% or more.

Although not displayed in the following tables, it is worth noting that motivations for general online behaviour were similar, both for those who had consumed any illegal content, and for the general internet population, since these questions focused on the general acts of downloading, streaming and sharing (without any reference to legality). The sub-section following this one focuses on motivations for lawful and unlawful activity.

Table 3.1a. Motivations for downloading (or not) content online

DOWNLOADING CONTENT ONLINE	
You indicated you have downloaded [CONTENT TYPES] in the past three months. Generally, what would you say are your personal reasons for downloading these types of files rather than buying a physical version such as a CD, DVD, Blu-ray, paper, etc.?	
Base: All who had downloaded any of the six content types of interest in the past three months (2013)	
It's easier/more convenient	63%
It's quicker	55%
It's cheaper	42%
I can access them more easily on the devices I have	34%
I can get them for free	31%
The quality isn't noticeably different	16%
It's more up-to-date	15%
No physical version available	12%
It's what everyone does	11%
What are the reasons that you have not downloaded any files in the past three months?	
Base: All with internet access who'd not downloaded any of the six content types of interest in the past three months (2972)	
I'm not interested	65%
I prefer to have a physical copy	15%↓
I'm not sure how to do it	13%
I fear they may have viruses/ malware/ spyware	7%
They are too expensive	7%
I fear that they could be illegal	5%
I prefer to stream/access (without downloading) files	6%
It is easier to buy physical copies	5%

↑ Sig. increase (from W4)
↓ Sig. decrease (from W4)

Table 3.1b. Motivations for streaming or accessing content online

STREAMING / ACCESSING CONTENT ONLINE	
You indicated you have accessed or streamed [CONTENT TYPES] in the past three months. What are your personal reasons for doing this?	
Base: All who had streamed or accessed any of the six content types of interest in the past three months (2492)	
It's easy/convenient	60%
It's quick	48%
It's free	44%
It's easy to do	40%
To watch programmes I have missed (on TV)	23%
For entertainment	30%
It means I don't have to download them	20%
It's quicker than downloading	21%
It means I can try something before I buy it	14%
It's cheaper than downloading	13%
Some types of files are too expensive to buy	6%
It's what my friends or family do	6%

Table 3.1c. Motivations for sharing content online

SHARING CONTENT ONLINE	
You indicated you have shared [CONTENT TYPES] in the past three months. What are your personal reasons for doing this?	
Base: All who had shared any of the six content types of interest in the past three months (454)	
It's easy to do	49%
It's only fair	29%↓
It's what everyone does	26%
I should be able to share my content with whomever I choose	16%
My friends/family can't access files themselves	15%

- Since the last wave in 2013, the motivations for using general online activities remain largely stable. There is a slight decline in the overall response but this is not a significant change.

- “Ease/convenience” remains the prime motivator both for downloading (63%) and for streaming/accessing (60%) content. Speed (i.e. “it's quick”) was also highly cited – by 55% among downloaders and 48% among streamers. These responses have been at similar levels across all four waves conducted so far.

- The ability to access content for free appeared more important to streamers (44%) than to downloaders (31%).

- The majority (65%) of those who said they didn't download were simply not interested, but apart from this, the preference for owning a physical copy was also a major reason (15%). The preference for owning a physical copy has declined significantly from W4 (23%).

- Amongst those who have shared files, the ease of sharing ("easy to do") was the main reason given (49%).

Findings from the Qualitative interviews:

The qualitative interviews amongst infringers highlighted that consumers perceive different activities as having varying levels of seriousness in infringement. The hierarchy noted is as follows.

Sharing files was widely thought to be the activity where the seriousness of conducting illegal activity is greatest. This is then followed by downloading activity with the lowest level of infringement regarded as streaming.

Infringers described their perceptions about the different types of activities and stated that sharing files is the least secure activity as it can provide access to users' devices. This was seen as a concern and a potential impediment to doing it. Sharing (uploading) was also seen to slow down the downloading process.

With regards to downloading, infringers considered this activity to require the most work. It required infringers to do the most and it was seen that there is a need to plan ahead and to ensure they have enough disk space to store files. Some mentioned that they carry out background research on the source before downloading files from a site. However with downloading the main benefit cited was that they could then store a high volume of content. In addition, portability between devices and across formats is another motivation for downloading that was cited in the interviews.

Streaming of content is generally perceived to be "less illegal". This was seen to be the most secure as there is no downloading involved and hence less exposure to their devices. Streaming was also considered a much faster way of accessing content than downloading. There is generally some reluctance (amongst infringers) to subscribe to illegal streaming services as there is a reticence towards sharing personal information. Streaming is also seen as a good fit for accessing content whilst out of home, however there are concerns over data allowance and device battery life.

3.2 Attitudes towards online content

Respondents were asked the following, in relation to their consumption of digital media.

To what extent do you agree or disagree with each of the following statements?

1: Strongly agree

2: Slightly agree

3: Neither agree nor disagree

4: Slightly disagree

5: Strongly disagree

The table below outlines the proportions who agree (strongly or slightly) amongst all those with internet access (aged 12+), and then amongst the three legality groups (aggregated across all six content types):

Table 3.2: Proportion of legality groups who agree with statements

Q.4 To what extent do you agree or disagree with each of the following statements?	All aged 12+ with internet access	100% legal	Mix of legal and illegal	100% illegal
Base	4552	1166	491	264
Content that you download or access online should be cheaper than the equivalent purchased in a physical format	58%↓	71%↓	72%	48%↓
It is wrong to access content online without the creator's/artist's permission	53%	64%	42%	33%↓
The rules governing what you can and can't do with content you purchase should be the same for both physical and online formats	49%	61%	48%↓	36%
If you had paid for a digital file you should then be able to share it with others	39%↓	44%	53%↓	36%↓
It is easy to find content on the internet for free that would usually be paid for	36%↓	39%	60%↓	37%
I think that you should be able to download or access the content you want for free from the internet	34%	34%	53%	41%
The price that you pay to download or access content online is generally about right	28%	31%↓	34%	25%
I find it difficult to find legal content online	17%	15%	31%	23%

- There were some significant changes in the levels of agreement with the above statements between W4 and W5. In general, the level of agreement has declined across each of the groups in this wave.

- The majority of those aged 12+ with internet access, agreed that online content should be cheaper than the equivalent purchased in a physical format (58%). However, the figure was much lower among those who consumed all their content illegally (48%) than among those who consumed legal content (71%).

- In terms of the statement: "the price you pay for downloaded or accessed content online is about right" the level of agreement was also lower among those who consumed only illegal content (25%) than among the other two groups (31%-34%).

- The 'mix of legal and illegal' group was the most likely to agree that "you should be able to share digital files if you have paid for them" (53%). Sixty per cent of this group also agreed that "it is easy to find content on the internet (that you usually pay for) for free". Both infringing groups were less likely to think "it is wrong to access content online without the creator's/artist's permission" – 42% and 33% respectively compared to 64% among those who consumed all their content legally for 'mix of legal and illegal' and '100% illegal.

3.3 Motivations for lawful and unlawful behaviour

Further questions on attitudes were asked in order to assess the primary motivations for lawful and unlawful behaviour, in an attempt to uncover factors that might encourage those who currently infringe to stop.

Respondents who paid for any content were asked:

You indicated you have paid to download or stream/access [CONTENT TYPES] in the past three months. What were your personal reasons for doing this rather than using services where you could have got them for free?

It is important to take into account that when we ask about the use of paid services over free ones we are not necessarily implying that the latter are illegal – as we have seen for many of the content types, free services such as YouTube, BBC iPlayer and Facebook are particularly popular when it comes to consuming and sharing content.

However, as well as assessing responses among those who simply paid for any content, it is also possible to compare the responses of those who consumed content both legally and illegally with those who consumed content only legally. Table 3.3a displays the main reasons given for paying for online content:

Table 3.3a. Motivations for using paid services

	Any paid	100% legal	Mix of legal and illegal
Base	1481	487	308
It's easier/more convenient	48%	41%↓	43%
It's quicker	44%↑	38%	45%
I don't want to use illegal sites	37%	37%↓	22%
I want to support creators/industry	24%	21%↓	20%↓
I think it's morally wrong to use illegal sites	24%	23%	11%
I fear they may have viruses/ malware/ spyware	22%	19%↓	17%↓
They are better quality	24%	21%	28%
I don't think it is right to get them for free	16%	13%↓	5%↓
I prefer to pay	16%	12%↓	11%
I can afford to pay	17%	10%↓	15%
I fear I might be caught	8%↑	6%↓	8%
I'm unaware of the free services available	9%	15%↑	6%
I don't know how to use the free services	6%	8%	2%
Average number of reasons cited	**2.9**	**2.6**↓	**2.3**↓

- There are significant shifts in the reasons cited for using paid services. This may be a function of the decrease in the average number of responses which were provided, particularly among those who exclusively use legal services.

- Convenience was the most commonly-cited reason both amongst those who accessed all of their content legally and among those whose consumption was partly illegal (48% v 43%).

- However, there were marked differences among the two legality groups across the other motivations. Those who consumed content entirely legally were much more likely (37%) than those who infringed (22%) to say that they did not want to use illegal sites (possibly conflating free sites and illegal sites).

- Compared to those who accessed both legal and illegal content were more likely to say that they used paid services because they are quicker (45% v 38%), and because they are better quality (28% v 21%).

- Those who accessed both legal and illegal unsurprisingly, were less likely to be averse to free and illegal services; just 11% said they "think it's morally wrong to use illegal sites", and 5% that they "don't think it is right to get content for free".

Respondents who indicated that they had infringed in the past 3 months were asked:

You indicated you have downloaded or streamed the following types of files in the past three months which you think may have been done so illegally [CONTENT TYPES]. What are your personal reasons for doing this?

The main reasons given for unlawful consumption of content were as follows:

Table 3.3b. Motivations for unlawful consumption of content online

	Any illegal	100% illegal	Mix of legal and illegal
Base	761	268	493
It's free	49%	43%	53%
It's easy/convenient	43%	39%	46%
It's quick	37%	32%	40%
It means I can try something before I buy it	17%	8%	22%
I can't afford to pay	14%	7%	18%
I think legal content is too expensive	13%	9%	15%
Because I can	16%	11%	19%
I've already paid to see it/them at the cinema/in concert, etc	7%	3%	10%
I already owned content in another format	9%	4%	12%
I don't want to wait for content to become available on legal services	7%	3%	10%
The Industry makes too much money	9%	6%	10%
It's what my friends or family do	9%	7%	9%
I already spend enough on content	5%	1%	8%
The files I want are not available on legal services	8%	3%	10%
I don't think I should have to pay for files online?	5%	4%	6%
No one suffers	4%	2%	6%
I think legal content is too poor quality	2%	2%	2%
No one ever gets caught	2%	3%	2%
Average number of aspects cited	**2.5**	**1.8**	**2.7**

- Even amongst infringers the average number of reasons cited for using unlawful services has seen a notable decline from 3.1 in W4 to 2.5 reasons in W5.

- Overall, the free aspect (49%) is the main motivation for illegal consumption, and this has been the case in all five waves of the research. Generally, responses were higher for those in the 'mix of legal and illegal' group than for the '100% illegal' group, and this is reflected in the average number of reasons cited by each group (2.7 v 1.8 respectively).

- Twenty-two per cent of all the 'mix of legal and illegal' group said they do it because they can try before they buy which is higher than the exclusive infringers group as well as the any illegal group (22% v 8% v 17%)

Findings from the qualitative interviews among infringers:

The qualitative interviews complemented the quantitative results stated previously. Infringers said that they use unlawful services as the legal sites are perceived to be very expensive especially when free alternative sources are available. Infringers could be persuaded to potentially pay for some (single) tracks or shows but when they want to access albums or series of shows, they prefer to use the alternative free sources. There was an indication that unlawful services are often used when people wanted to trial some content. However, this does not necessarily mean that after the trial they are likely to purchase the content legally. When asked why they won't buy the content after the free trial one respondent said "I can't afford 100+ tracks!" suggesting that there is an implicit acknowledgment of the value of the content that infringers were consuming.

Another key motivation for using unlawful services was the accessibility and scale of illegal sources. It was generally perceived that unofficial sources have a much wider library/range of content available than the legal paid services. Illegal services were also seen to provide access to older or more niche content which is not necessarily available through paid services.

Quality of content being consumed was not generally seen as an impediment to using unofficial services and the trade-off between payment and higher quality was not deemed worthwhile. There were some suggestions that infringers find it less complicated to use unlawful services as they were generally seen to be reasonably reliable and efficient. In this context one of the male respondent said - "It works and it's really straightforward, there's no negative side to it being illegal. You would think the paid site would be more efficient or reliable but it's the same, there's no difference really."

Having the convenience of easy access to content was another motivation given for use of unlawful services. There was a perception that they were open and easy to use whenever they like and most give the option to either download or stream the content depending on the devices and broadband/ WiFi connection that they have.

Finally, a motivation that also emerged for illegal service use was to access to content before it becomes available in the UK. This was most commonly noted when discussing TV shows and films that are often released in the USA before the UK or which have restricted access in the UK.

Infringers were also asked:

And which, if any, of the following do you think would make you stop downloading or streaming files illegally?

Table 3.3c. Aspects that would encourage stopping accessing content illegally online

	Any illegal	100% illegal	Mix of legal and illegal
Base	761	268	493
If legal services were cheaper	25%	14%	32%
If everything I wanted was available legally	21%	10%	26%
If it is clearer what is legal and what isn't	21%	18%	23%
If everything wanted was available legally online as soon as released elsewhere	16%	7%	20%
If legal services were more convenient/flexible	10%	4%	13%
If I thought I might be sued	15%	8%	19%
If legal services were better	12%	6%	16%
If a subscription service I was interested in became available	13%	10%	16%
If I thought I might be caught	15%	11%	17%
If my ISP sent me a letter saying they would suspend my internet access	15%	10%	18%
If I knew where to go to see if something was illegal or not	10%	6%	12%
If everyone else stopped doing it	11%	8%	13%
If friends or family were caught	11%	6%	14%
If my ISP sent me a letter informing me my account had been used to infringe	11%	7%	13%
If my ISP sent me a letter saying they would restrict my internet speed	10%	5%	13%
If there were articles in the media about people being caught	6%	4%	8%
Nothing would make me stop	10%	14%	8%
Average number of aspects cited	**2.3**	**1.4**	**2.8**

- The top four most commonly-cited factors were all themed around making legal services more attractive, with the top response being "if legal services were cheaper" (25% of infringers). This was markedly higher among those who consumed both legally and illegally (32%) than among the 100% illegal group (14%).

- The threat of letters from ISPs had comparatively less effect on predicted behaviour; 15% of infringers said that they would be put off “if my ISP sent me a letter saying they would suspend my internet access”, 11% said “if my ISP sent me a letter informing me my account had been used to infringe” and 10% “if my ISP sent me a letter saying they would restrict my internet speed”. Each of these responses were significantly lower amongst the 6% of internet users who consumed content exclusively illegally. We see a slight increase in those saying that “if my ISP sent me a letter saying they would suspend my internet access” from 7% in W4 to 10% this wave.

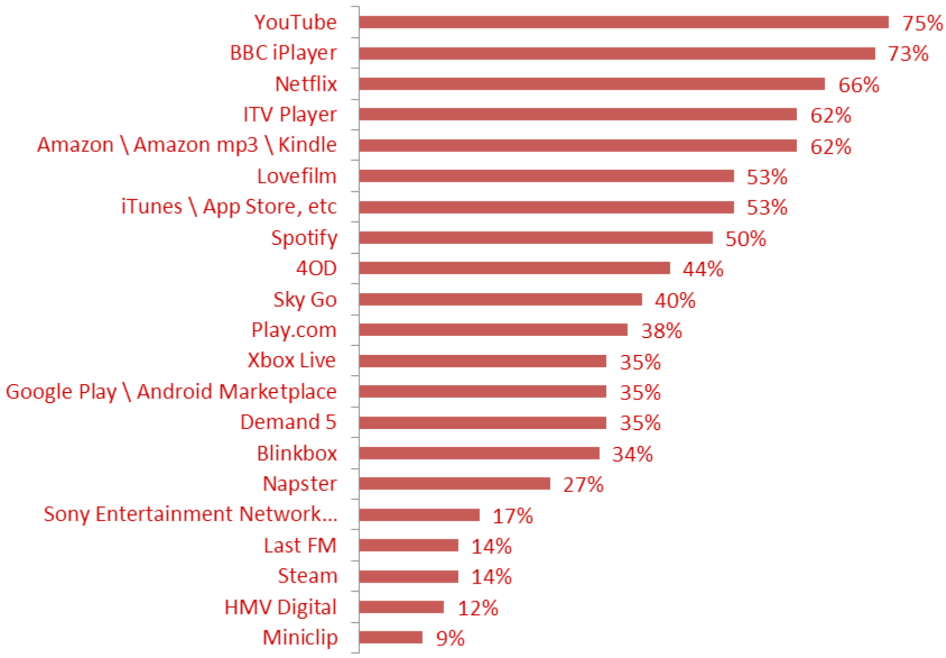
- This year we see more infringers saying that “nothing would make me stop” compared to the previous wave (6%). The response to this statement has increased even amongst those undertaking a mix of illegal and legal activities.

- Further there has been a decline in the average number of responses given here across all three groups, particularly among the mix of illegal and legal group compared to last wave (wave 4 average number of responses was 2.8 among ‘Any illegal’ group, 1.7 among 100% illegal group and 3.3 among ‘mix of illegal and legal’ group).

3.4 Awareness of lawful/licensed services

The following chart shows prompted awareness of lawful / licensed sites[18] offering any of the six content types covered in this survey. The figures below include people who also indicated that they had used any of these services in the past three months.

Chart 3.4a: Proportion of internet users aged 12+ aware of lawful/licensed online services (base size: 4552)



- YouTube, BBC iPlayer retain their position as the top two services that internet users are aware of.
- Netflix has risen up the rank to third position from sixth in the previous wave.
- Awareness of YouTube (75%), BBC iPlayer (73%) and ITV Player (62%) have seen small but significant declines from the previous wave. Whilst Netflix (66%), Demand 5 (35%), Sky Go (40%) and Blinkbox (34%) have risen significantly from previous wave.
- Spotify's awareness (50%) continues to grow in this wave (up from 44% in W4).

18 Note that unlawful activities are possible on some of these services (such YouTube, iTunes, Google Play, etc).

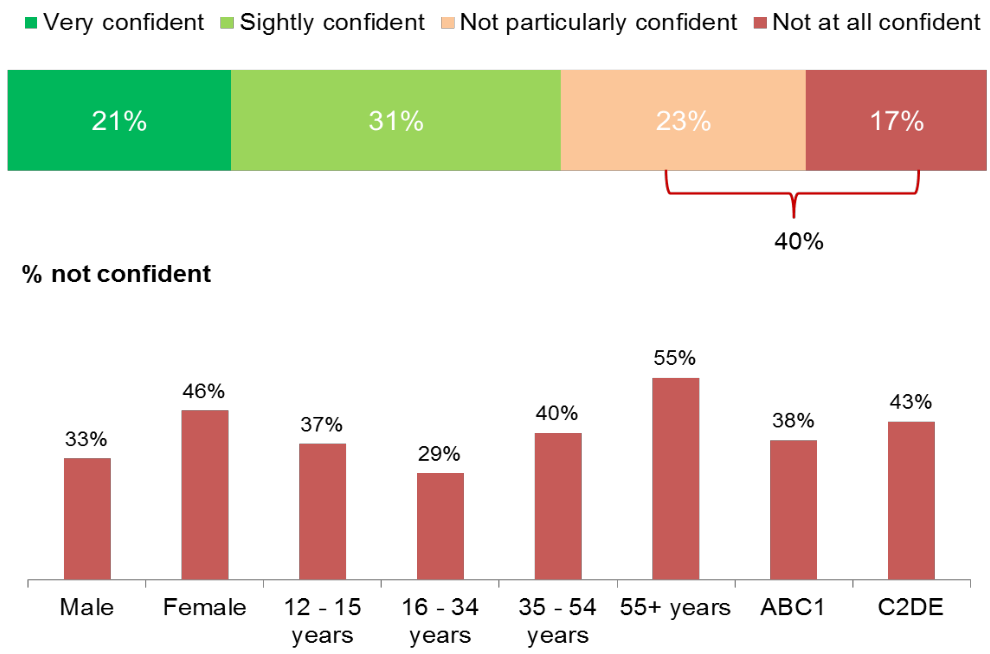
3.5 Confidence in knowing what is and isn't legal online

Respondents with internet access were asked the following question:

How confident are you that you know what is legal and what isn't in terms of downloading, streaming/accessing, and sharing content through the internet?

The results are shown in the chart below, with the proportion who said they were *"not particularly confident"* or *"not at all confident"* broken down by sex, age and socio-economic group (16+ only).

Chart 3.5a: Confidence in knowing what is and is not legal online



Base: internet users aged 12+ (4552)

- Since 2013, there has been no significant change in the level of confidence in knowing what is legal online and what isn't.

- Half of internet users (52%) claimed to be confident in knowing the legal content from the illegal material online.

- 40% of all internet users aged 12+ claimed to be either "not particularly confident" or "not at all confident" in terms of what is and isn't legal online.

- This lack of confidence appeared more prevalent amongst females (46% v 33% of male) and C2DEs (43% v 38% of ABC1), i.e. those less likely to participate in all forms of online activity (legal and illegal). Whilst lack of confidence generally increases with age beyond 34 years, 12-15 year olds (37%) showed similar levels of confidence to 35-54 year olds (40%).

4. Technical appendix

Data-collection methodology for the quantitative element of this study

The research universe for this study was all aged 12+ in the UK. Although some elements of the survey cover those without internet access, so as to provide a nationally representative frame, the core focus of the study (and thus the majority of questions) was the UK online population aged 12+.

A mixed online and face-to-face methodology was employed for this project, following the guidelines established in response to the illegal file-sharing pilot study[19] in 2010. The original design recommended by Kantar Media was subsequently approved via peer review, albeit with several amendments.

For the pilot research the core objective was to establish the most appropriate methodology for measuring behaviour and attitudes in this area. The main drivers that sat front of mind when assessing the most appropriate methodology (for what is clearly a sensitive yet technical subject matter) were representativeness, honesty of responses, and consumer understanding of the issues and terminology. These were all addressed as far as possible, and provided a solid grounding for the ongoing tracker methodology. The benefits of the 'chosen methodology' are as follows:

- It is the most suitable / relevant methodology to the subject matter.
- It appears to be the most likely to generate honesty, due to being entirely self-completion (i.e. removing the interviewer conditioning effects).
- It contains a higher incidence of high frequency internet users; key to qualification for any questions on illegal online behaviour, and hence providing a more robust sample / higher representation with which to profile and cut the data. This sample can be down-weighted in order to provide the true proportion among all adults.

However, despite these benefits, it is clear that an online sample cannot be considered representative *in isolation* as it:

- Reduces coverage of 65+ year olds significantly.
- Provides only a handful of low-frequency internet users, who are less likely to participate in the kind of behaviour covered, but are again necessary for a representative sample.

19 http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/filesharing/kantar.pdf

Therefore a single methodology approach to the project is not sufficient, and a mixed one is more likely to generate accurate and representative results. All the missing elements from the CAWI (Computer Aided Web Interviewing) online sample (i.e. over-65s and non/infrequent internet users) can feasibly be supplemented by a CAPI (Computer Aided Personal Interviewing) face-to-face methodology (with a self-completion element for sensitive areas) interviewing just those groups.

The core online survey

For the core online survey we chose to make use of the Kantar online omnibus. However, rather than offer a standard omnibus approach we provided Ofcom with the flexibility to run a standalone project within the Omnibus framework – i.e. an omnibus survey set up just for this project with the precise sample definition we require, the timings we require and the sample numbers we require. This has two key advantages:

- Disguising the subject matter, since it would include a standard Omnibus invitation rather than a survey with specific subject matter, hence also avoiding a situation where respondents demand to know who the survey is for.

- Retains consistency with the file-sharing pilot approach in terms of both methodology and personnel (the same team available to co-ordinate).

Face-to-face to ‘fill the gaps’

The face-to-face (CAPI) element was also conducted using the Kantar Omnibus (as it was for the pilot study) rather than ad-hoc. Our CAPI Omnibus 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. The sample design is also structured in a way that allows a nationally representative sample to be gained from a ‘half wave’ of c.1,030. All these factors make it a high quality and cost-effective research solution for those who want to access a representative sample or specific groups.

We used the CAPI omnibus to screen for eligibility (internet use) and only those aged over 65 and/or those who are non / low-frequency internet users were then asked subsequent questions.

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 is 100% self-completion. Although we had some concerns that older age groups might prefer to be asked the questions in person due to being less technically proficient on the whole, this only applies to those who claim to partake in online behaviour. We therefore felt it was safe to assume that if they are proficient enough to download via a computer, they should have little trouble in using the CAPI machine with an interviewer’s guidance.

Including 12-15 year olds

12-15 year olds have to be handled quite differently to adult respondents as they need to be recruited via their parents (who are asked for consent). Among children of this age group, we could confidently use online only (rather than including a face-to-face supplement) as internet penetration and frequency is so high.

Consistency of timings

All three surveys were run concurrently in field in order to avoid bias in the data caused by any changes in the market, particularly given the rapid pace of change, and high-profile cases in the media. This was another advantage of adopting an Omnibus approach, as all three surveys were turned around in a period of two weeks. Fieldwork took place between 24 May and 6 June.

The sample

Sample structure

The table below shows the breakdown (by data-collection methodology) of the total sample size per quarter, in comparison to that from the pilot survey (chosen methodology):

Methodology	Description	Sample Size
Online (CAWI) adults	16-64 year olds who use the internet at least once a day	2947
Face-to-face (CAPI) adults	16-64 year olds who use the internet less than once a day 16-64 year olds without internet access All 65+ year olds	1247
Online (CAWI) 12-15s	All 12-15 year olds with internet access	998
TOTAL	**All 12+ year olds in UK**	**5192**

Sample selection

The way in which the sample was selected varied across methodologies:

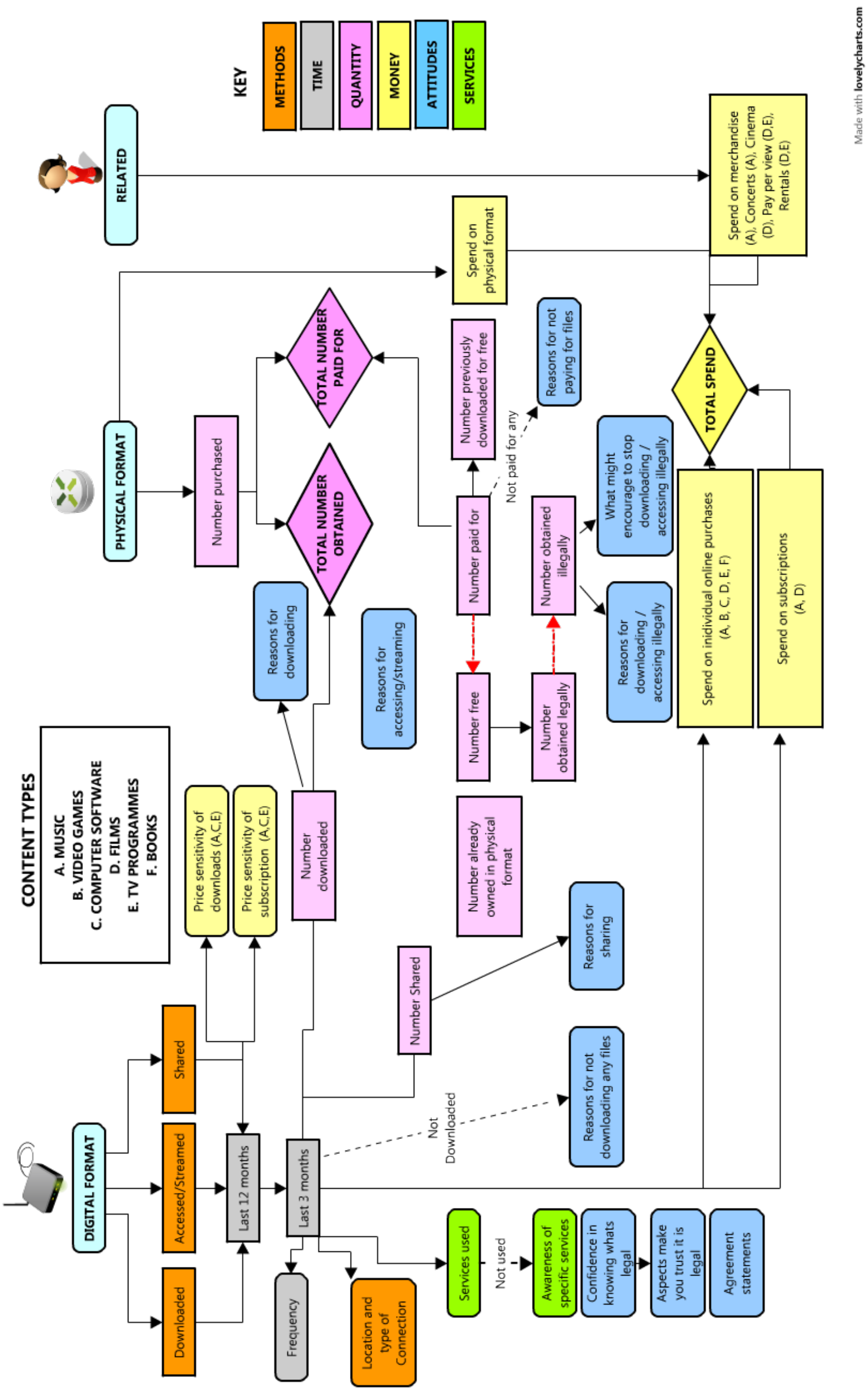
Online interviews (adults 16+): The sample was initially selected using demographic information already held, from Kantar's 'Lightspeed' consumer panel (this information is regularly updated, since it is a fully managed panel). The panellists were invited via email to take part in the survey, and demographic quota targets (sex, age, working status and region) were set to ensure that the end sample profile was representative of the UK internet population. Respondents were screened out if they claimed to use the internet less than once a day.

Online interviews (12-15 year olds): Invitations to complete the questionnaire were emailed out to a separate sample of online panellists who had previously agreed to participate in market research, and have children in the relevant age group. They were instructed to pass the completion of the survey on to their child having agreed they can participate. Quotas were set by age (250 of each age 12-15) and gender. The survey was left open for a week and then closed when the required sample profile was achieved.

Face-to-face interviews (adults 16+): 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.

The questionnaire

The full questionnaire is available as a separate document, but the following diagram demonstrates the overall flow and topics asked about:



Weighting

Data were weighted on three different measures (among all 12+ year olds, including those without internet access) in order to address imbalances in the sample. As there is no definitive single source for 12+ and frequency of internet use, three different sources were used and the 12-15 year old and 16+ sample were weighted separately; the weighting efficiency for these were 97.8% and 92.6% respectively.

SEX WITHIN AGE WITHIN SOCIAL GRADE (000's)Source: NRS 2010 (16+) & ONS Mid 2010 Population Estimates (12+)	12-15	ABC1 16+	C2DE 16+
Male	2.8%	24.2%	21.9%
Female	2.7%	27.0%	21.4%

REGION Source: ONS Mid 2010 Population Estimates (12+)	%
Scotland	8.6%
Northern Ireland	2.9%
North England (Yorkshire and the Humber, North East, North West)	24.2%
Midlands (East Midlands, West Midlands, East of England, Wales)	30.6%
South England (London, South West, South East)	33.7%

INTERNET USAGE Source: OCI W1 July 2012 (16+)	16-24	25-34	35-44	45-54	55-64	65+
At least once a day (QD codes 1 or 2)	11.8%	15.7%	12.3%	10.1%	8.2%	4.4%
At least once a week but less than once a day (QD codes 2 or 4 or 5)	1.3%	1.7%	2.4%	2.5%	1.8%	2.4%
Access the Internet Less Often	0.3%	0.3%	0.7%	1.6%	1.9%	2.5%
Do not access the Internet	0.5%	0.8%	1.3%	1.9%	3.3%	10.2%

Following weighting, the data were grossed to represent the UK 12+ population = 53.571 million (Source: ONS Mid 2010 Population Estimate).

Data distribution

Throughout the research, distributions have been assumed to be normal (also known as bell curve or Gaussian distribution) or binomial, depending on the type of question. Questions which have two stated (Yes/No) responses are binomial, while questions which have a volume response or are 'likert' are assumed to follow a normal distribution.

A 'likert' question is where people specify their level of agreement on a symmetric scale of agree-disagree or likely-unlikely. In market research, these scales tend to have points, and the distribution underlying the responses should, in theory, match the normal distribution. A volume response is one where the respondents answer with a value corresponding to their spend, or number of items auctioned within the past three months.

Although the volume distributions tend not to follow a strictly normal distribution, it is legitimate to use this distribution due to the central limit theorem. For a sufficiently large sample of independent random variables, the mean should be approximately normally distributed. The variables will be independent as one person's spend on music, will not necessarily influence another person's in most circumstances. This means that the mean can be calculated using the standard normal definition of dividing the sum of all volumes by the number of respondents. So if 1000 people spend £2,500 on ebooks in three months, the average spend would be £2.50.

In practice, for the distributions of this type, large numbers of people tend to spend small amounts of money, and a few people spend large amounts. This means the distribution is biased and the degree of bias can be seen by comparing the median (spend by middle person if all respondents are placed in ascending order of spend) and the mean. With a negatively biased distribution (most people spending a little), the median will be lower than the mean.

Details of the qualitative element of this survey:

We have supplemented the quantitative survey by qualitative in-depth interviews among those engaged with copyright infringement behaviours to help understand the motivations behind these activities. We have drawn upon insights from the previous quantitative OCI Tracker waves to identify key groups of interest and areas for further investigation for this qualitative phase.

We conducted **10 * 1 hour depth interviews with copyright infringers.** This sample included a mix of heavy, medium and light infringer across key categories like Music, Films and TV Programmes. The sample was distributed as follows:

Depth	Age band	Life stage	Social grade	Level of infringement			Location
				Music	TV	Film	
1	16-17	Pre-family/ single	C2DE	Mid	Mid	Light	Greater London
2	18-20	Pre-family/ single	ABC1	Mid	Mid	Mid	Greater London
3	21-24	Pre-family/ single	ABC1	Heavy	Heavy	Heavy	Greater London
4	25-29	Pre & young family	ABC1	Mid	Mid	Mid	Greater London
5	30-40	Pre & young family	ABC1	Mid	Mid	Mid	Greater London
6	30-40	Pre & young family	C2DE	Heavy	Heavy	Heavy	Manchester
7	16-17	Pre-family/ single	ABC1	Mid	Mid	Mid	Manchester
8	18-20	Pre-family/ single	C2DE	Heavy	Mid	Mid	Cardiff
9	21-24	Pre-family/ single	ABC1	Mid	Mid	Mid	Cardiff
10	25-29	Pre & young family	C2DE	Light	Heavy	None	Glasgow

Concept House
Cardiff Road
Newport
NP10 8QQ

Tel: 0300 300 2000
Fax: 01633 817 777

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