Online Copyright Infringement tracker

Benchmark Study. Quarter 3 – July 2012

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Background

Under the Digital Economy Act 2010, the remit of Ofcom was extended to include a range of new duties related to online copyright infringement. To address them Ofcom have been assigned to work with the Intellectual Property Office to gather initial evidence and to establish benchmarks and trends that can be used to measure subsequent research.

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Research Objectives

WIDER AIMS	**To establish the current level of subscribers' use of internet access services to infringe copyright.**	**To 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"***	**To identify further steps that have the potential to reduce copyright infringement and allow industry to maximise revenues.**
SPECIFIC RESEARCH OBJECTIVES	To measure online copyright infringement levels (alongside lawful activity) among UK consumers and monitor changes on a quarterly basis:	To gain deeper understanding of attitudes towards copyright infringement. To assess awareness and attitudes towards availability of lawful alternatives.	To measure spend on recorded and digital media to analyse potential impact of illegal file-sharing on purchase of related content (positive and negative). To explore willingness to pay and optimum pricing for different content.

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Methodology and sample composition

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5,099
TOTAL SAMPLE

KANTAR
Omnibus

OnLine Kids

992
12 - 15 year olds

OnLineBus

2,599
16 - 64 year olds who use the internet at least once a day

Face to Face

740
16 – 64 year olds who use the internet less than once a day or don't have any internet access

768
65+ year olds

Fieldwork took place between the 11th and 18th July 2012.

Weighting, to ensure overall sample is balanced correctly…

Data was weighted on 3 different measures:
- Sex within age
- Region
- Internet access frequency within age

As there was no single sources for weighted for 12+ and internet frequency figures 3 different sources were used and the 12-15 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%

We do not ask social grade of 12-15 therefore they were not weighted according to SEG

REGION
Source: ONS Mid 2010 Population Estimates (12+)

	TOTAL
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 CAPI study- waves 1&2 (16+)

	16-24	25-34	35-44	45-54	55-64	65+
At least once a day	11.8%	15.7%	12.3%	10.1%	8.2%	4.4%
At least once a week but less than once a day	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%

In order to get an appropriate frequency measure, the original CAPI sample for this study was weighted to be UK representative. 12-15's were not included but were assumed to fall out naturally

GROSSING FIGURE (ONS Mid 2010 Population Estimates (12+)	53,571 (000s).

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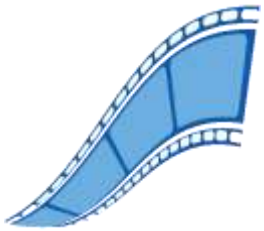
Definition of terms (as presented to respondents)



Streamed or Accessed - By this we mean that you viewed, listened or played content directly through the internet without downloading a copy. For example, watching videos on YouTube or TV programmes on BBC iPlayer.

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.

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Video Games copyright infringement

- Two per cent of UK internet users aged 12+ were estimated to have downloaded or accessed at least one video game illegally over the period May-July 2012. Of those who had downloaded or accessed any video games online over the period, close to a fifth (18%) had done so illegally.
- Video game online copyright infringers were responsible for illegally downloading or accessing 18% of all digital video games consumed on the internet.
- The vast majority of those who consumed any video games illegally were male (73%) and under 34 (85%).
- Video game infringers who consumed all their content legally spent more (£34.51) on average on content (physical and digital) than those who accessed any software illegally (£25).

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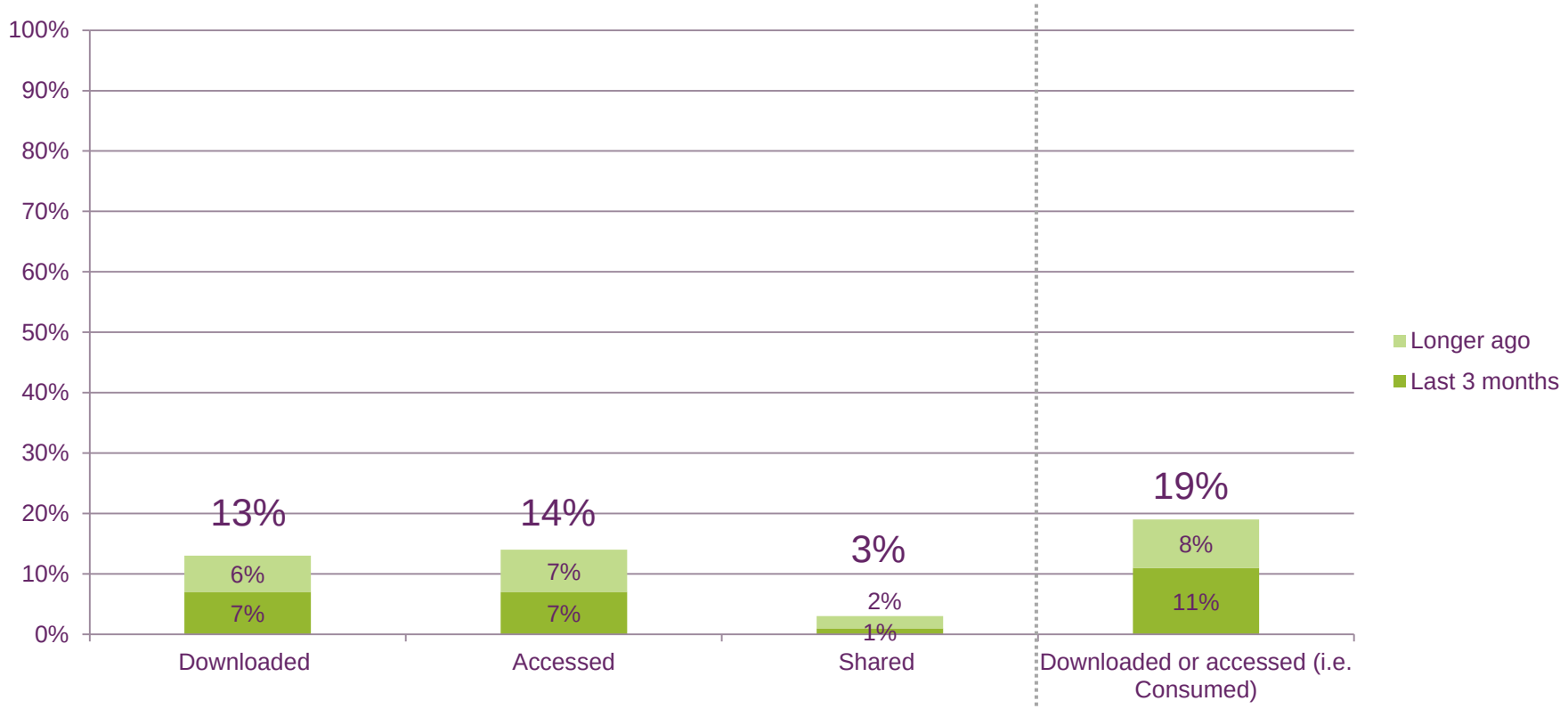
Slide VG1: Levels of downloading, accessing and sharing

Downloading and accessing of video games online are equally as popular (7% in the past 3 months). Sharing video games is a very niche activity.



	Downloaded	Accessed	Shared	Downloaded or accessed (i.e. Consumed)
Mean (median) number of video games	6 (2)	3 (3)	6 (3)	8 (3)

Question: Q1A/B/C. Have you ever <ACTIVITY> any of the following…? Have you <ACTIVITY> any of the following in the past 3 months? A: video games

Base: All 12+ in UK with Internet access (4,410) Averages based on those who have done each activity in the last 3 months (345, 356, 72*, 533) *Caution base under 100.

Notes: 1. Mean and median numbers are the averages amongst those who have done each activity in the past three months.

2. These metrics cover general behaviour so include both legally and illegally consumed content.

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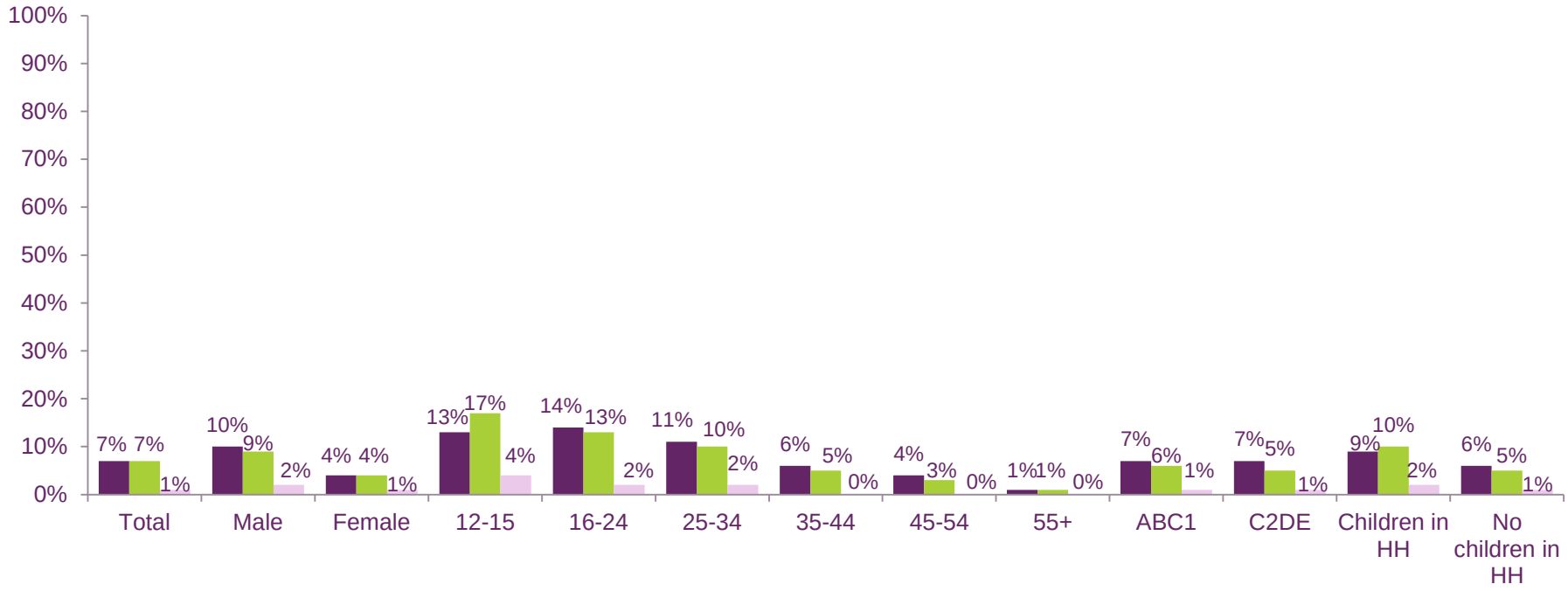
Slide VG2: Penetration of downloading, accessing and sharing (last 3 months) amongst demographics

All activities decrease with age - 12-15s have the highest aggregated incidence of downloading, sharing or accessing video games online at 22%.



	Total	Male	Female	12-15	16-24	25-34	35-44	45-54	55+	ABC1	C2DE	Children in HH	No children in HH
Downloaded, accessed or shared	11%	15%	7%	22%	20%	16%	9%	6%	2%	10%	9%	14%	9%

Question: Q2A/B/C. Have you <ACTIVITY> any of the following in the past 3 months? A: video games

Base: All 12+ in UK with Internet access (4,410) Male (2,180) Female (2,230) 12-15 (992) 16-24 (529) 25-34 (572) 35-44 (660) 45-54 (675) 55+ (982) ABC1 (1,886) C2DE (1,532).

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Slide VG3: Comparative profile table of downloaders, accessers and sharers

Downloading, accessing and sharing video games is heavily skewed toward males, under 34s and ABC1s.

Profiles	Downloaded	Accessed	Shared
Base	345	356	72*
Male	72%	68%	68%
Female	28%	32%	32%
12-15	12%	17%	25%
16-34	61%	60%	62%
35-54	23%	21%	11%
55+	4%	2%	1%
ABC1*	60%	66%	62%
C2DE*	40%	34%	38%
Children in household	45%	48%	60%
No Children in household	55%	52%	40%

Question: Q1A/B/C. Have you ever <ACTIVITY> any of the following…? Have you <ACTIVITY> any of the following in the past 3 months? A: video games

Base: As above.

*Note that Social Grade is not included for 12-15 year olds so profile is amongst 16+ year olds.

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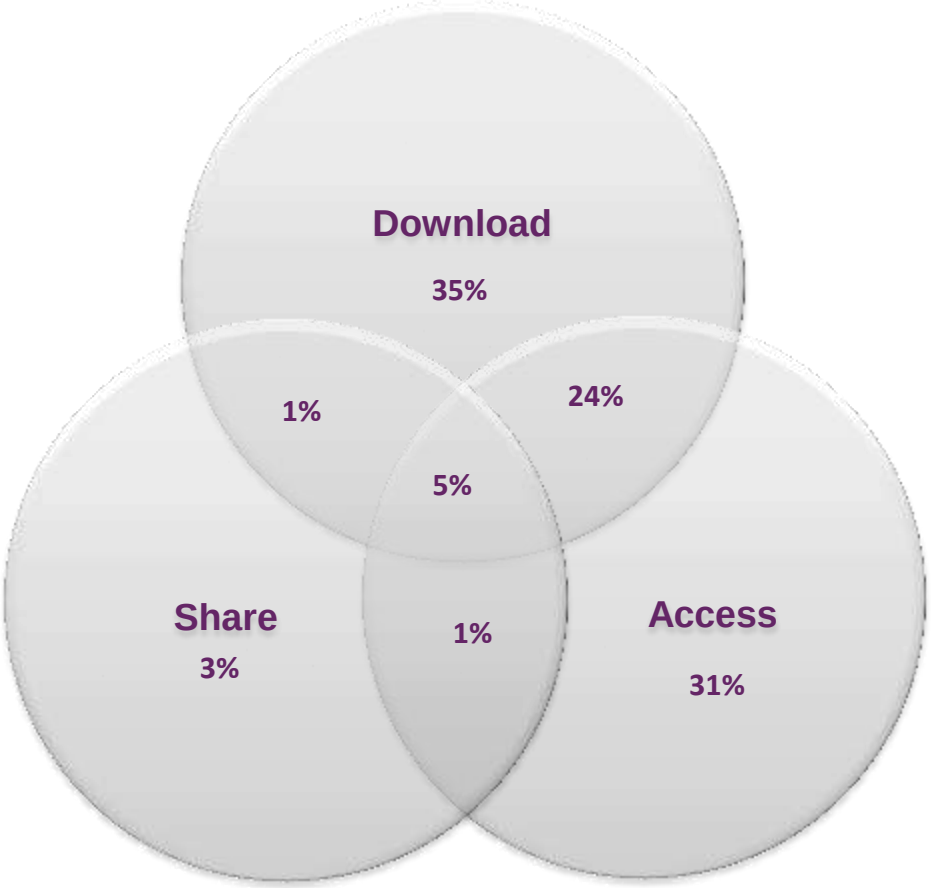
Slide VG4: Venn Diagram showing proportionate make-up of activities (downloading, accessing and sharing)

The majority of those who do any of the three activities only do one or the other in terms of downloading and accessing video games online – 35% only download, 31% only access. Twenty- four per cent download and access them.

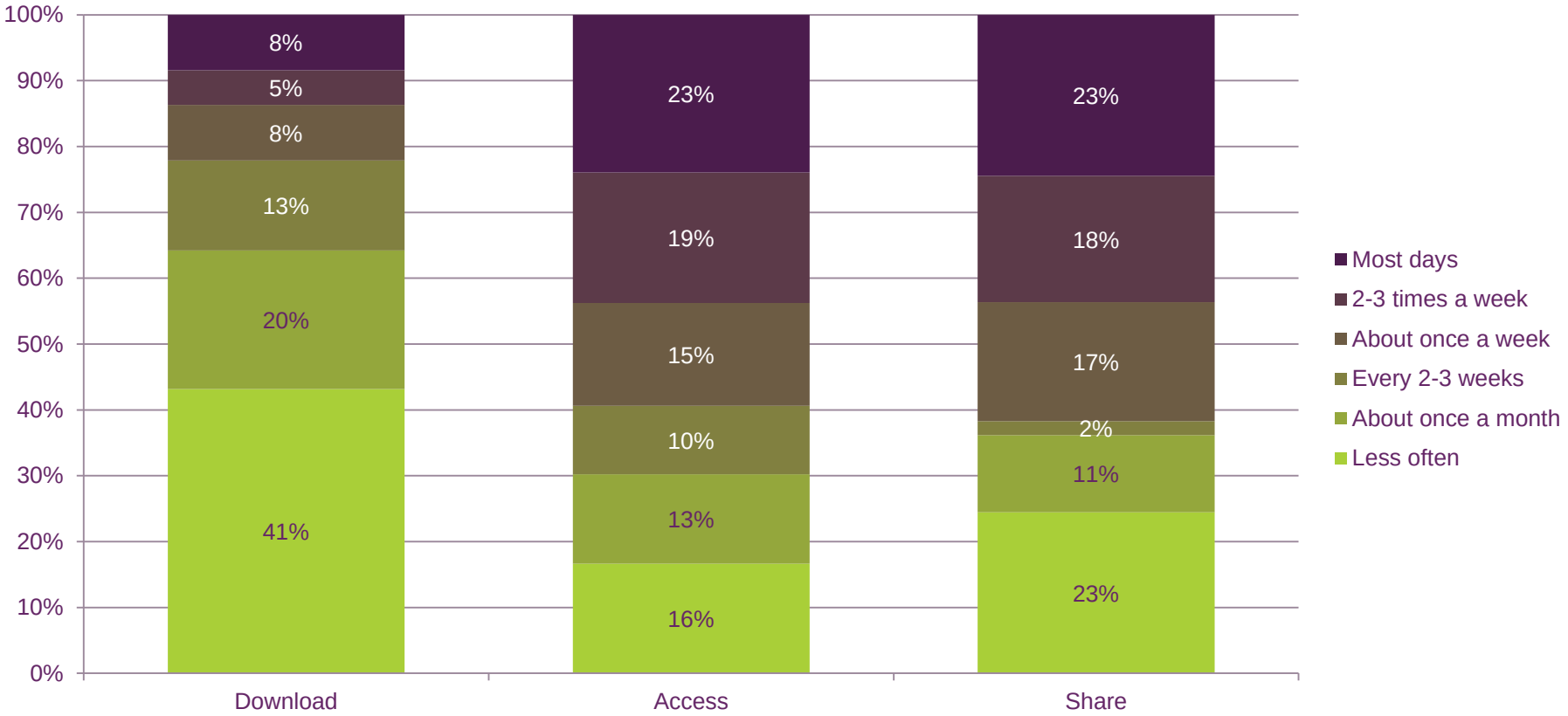


Question: Q2A/B/C. Have you <ACTIVITY> any of the following in the past 3 months? A: video games

Base: All 12+ in UK who have downloaded, accessed or shared video games in the last 3 months (554).

Slide VG5: Frequency of downloading, accessing and sharing video games online

Downloading is less frequent than accessing and sharing – 23% do each of the latter most days.



% done in past 3 months	7%	7%	1%

Question: QB2_2A/B/C Generally, how often do you [ACTIVITY video games] through the internet?

Base: All who have downloaded (345), accessed (356), shared (72*) video games in the past 3 months.
*Caution base under 100.

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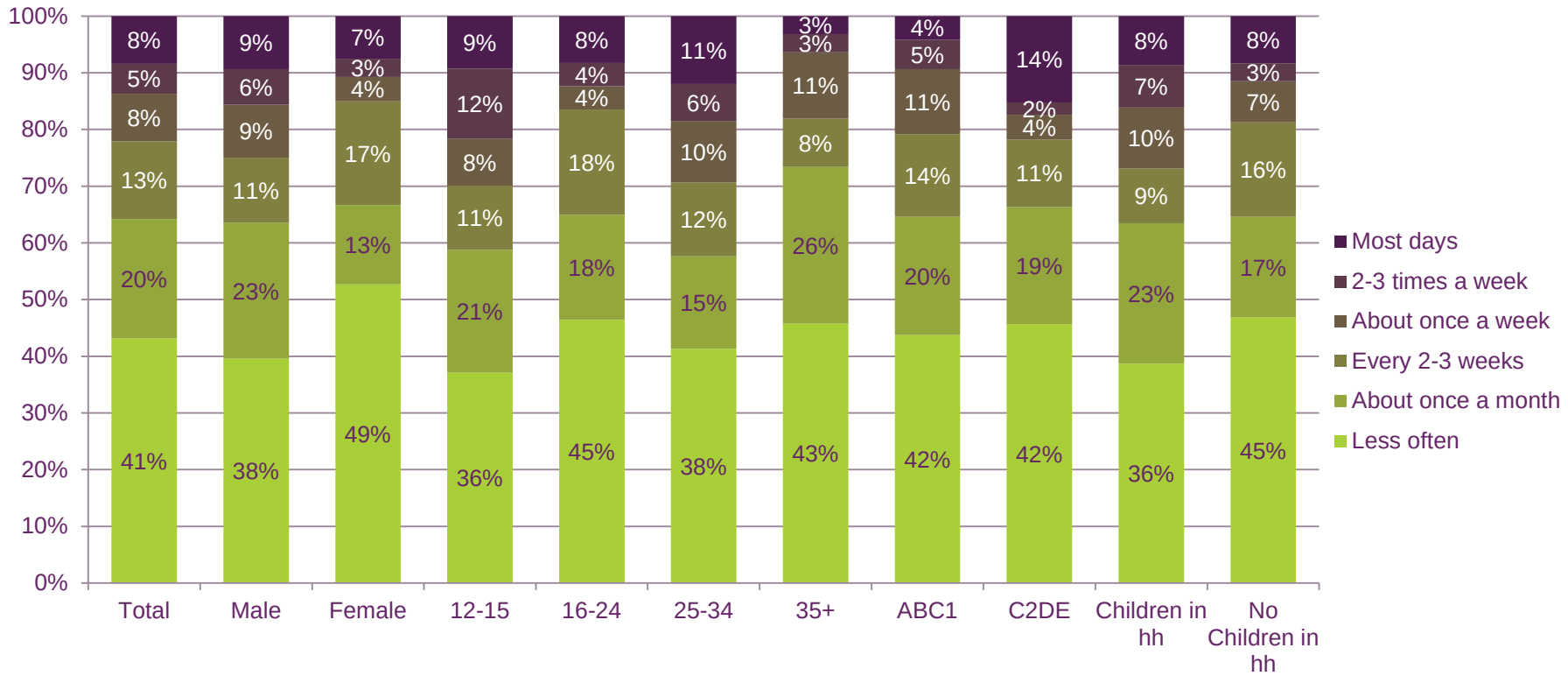
Slide VG6: Frequency of downloading video games by demographics

12-15s are the most frequent downloaders with 29% doing it at least once a week.



	Total	Male	Female	12-15	16-24	25-34	35+	ABC1	C2DE	Children in hh	No Children in hh
Done in past 3 months (%)	7%	10%	4%	13%	14%	11%	3%	7%	7%	9%	6%

Question: QB2_2A Generally, how often do you [download video games] through the internet?

Base: All who have downloaded video games past 3 months (345) Male (250) Female (95*) 12-15 (126) 16-24 (73*) 25-34 (62*) 35+ (84*) ABC1 (114) C2DE (105) Children in HH (207) No children in HH (138). *Caution base under 100.

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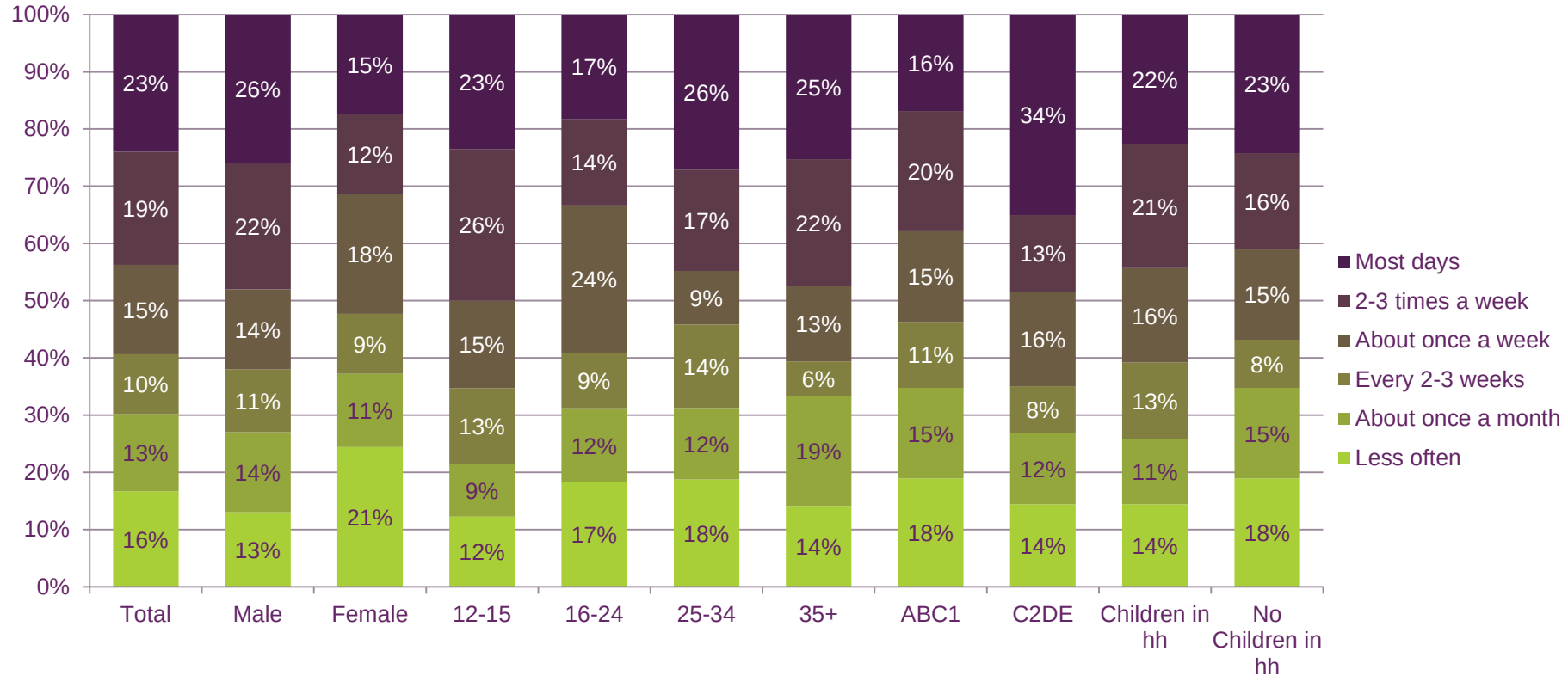
Slide VG7: Frequency of accessing video games by demographics

Sixty-four per cent of 12-15s who access video games online do so at least once a week.



	Total	Male	Female	12-15	16-24	25-34	35+	ABC1	C2DE	Children in hh	No Children in hh
Done in past 3 months (%)	7%	9%	4%	17%	13%	10%	3%	6%	5%	10%	5%

Question: QB2_2B Generally, how often do you [access video games] through the internet?

Base: All who have accessed video games in the past 3 months (356) Male (248) Female (108) 12-15 (169) 16-24 (66*) 25-34 (57*) 35+ (64*) ABC1 (111) C2DE (76*) children in HH (241) No children in HH (115). *Caution base under 100.

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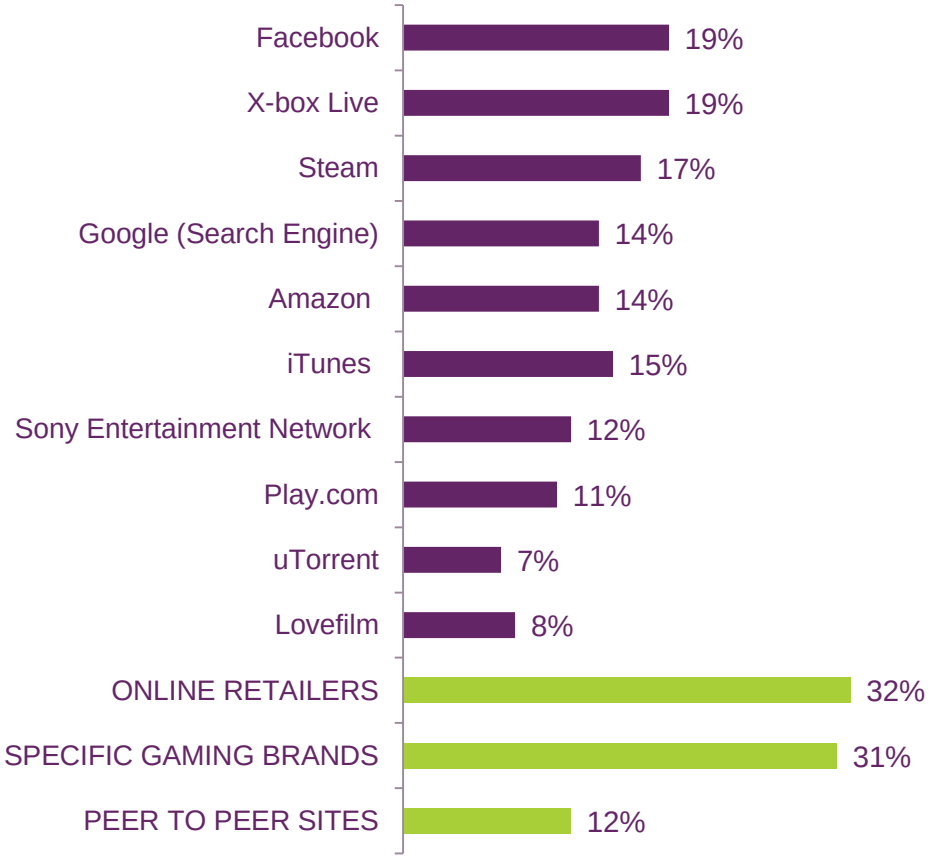
Slide VG8: Top 10 services used to download, access or share video games online

Facebook and Xbox Live were both used by 19% of those who had downloaded or accessed video games online in the past 3 months. Stream was also popular at 17%.

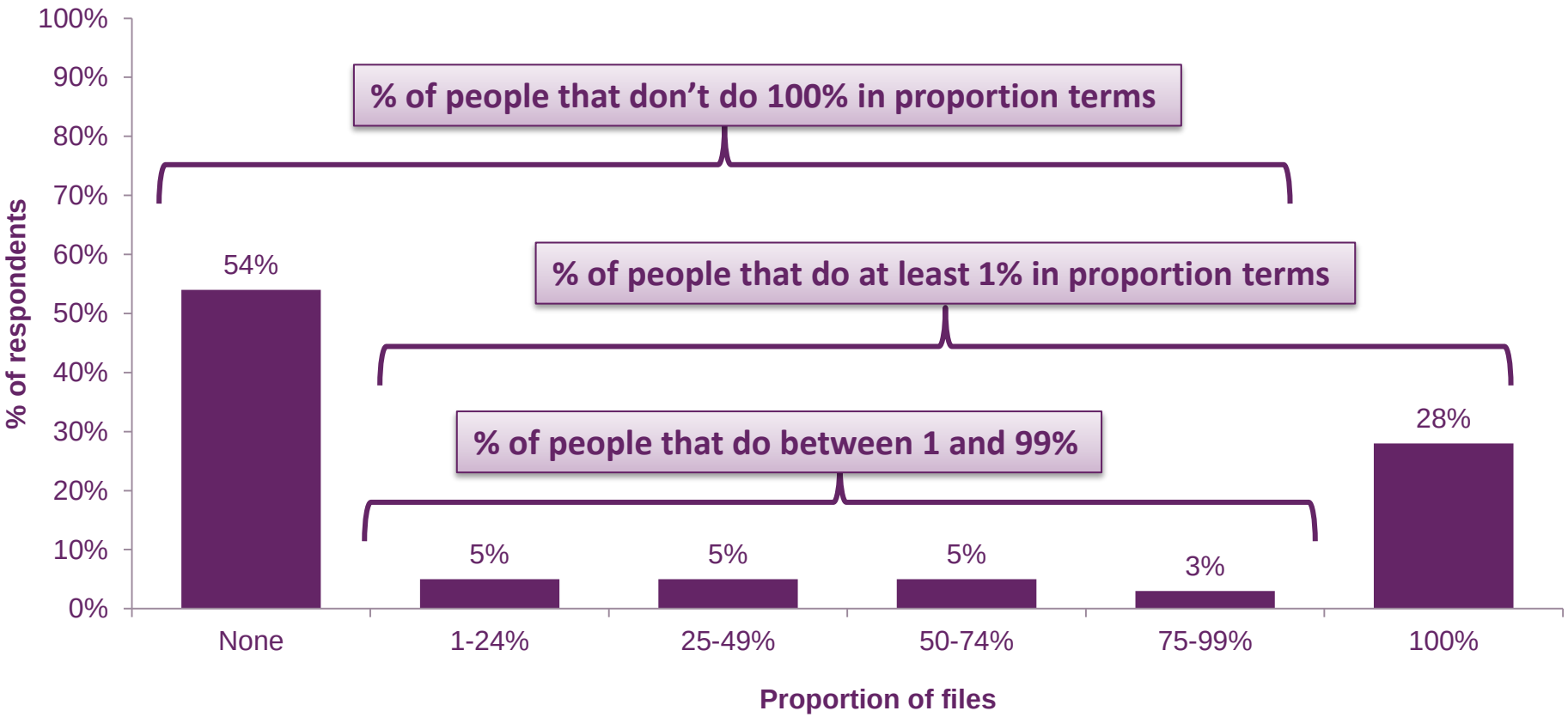


Question: QB2_4 Which sites or service shave you used in the past 3 months to download, access, or share video games through the internet?

Base: All who have downloaded, accessed or shared video games in the past 3 months (554).

Slide VG9: Explanation of proportion charts

The proportion slides follow a similar format, as explained below.
This slide is included as an aid to understanding, and the next slide follows a similar format to this template.

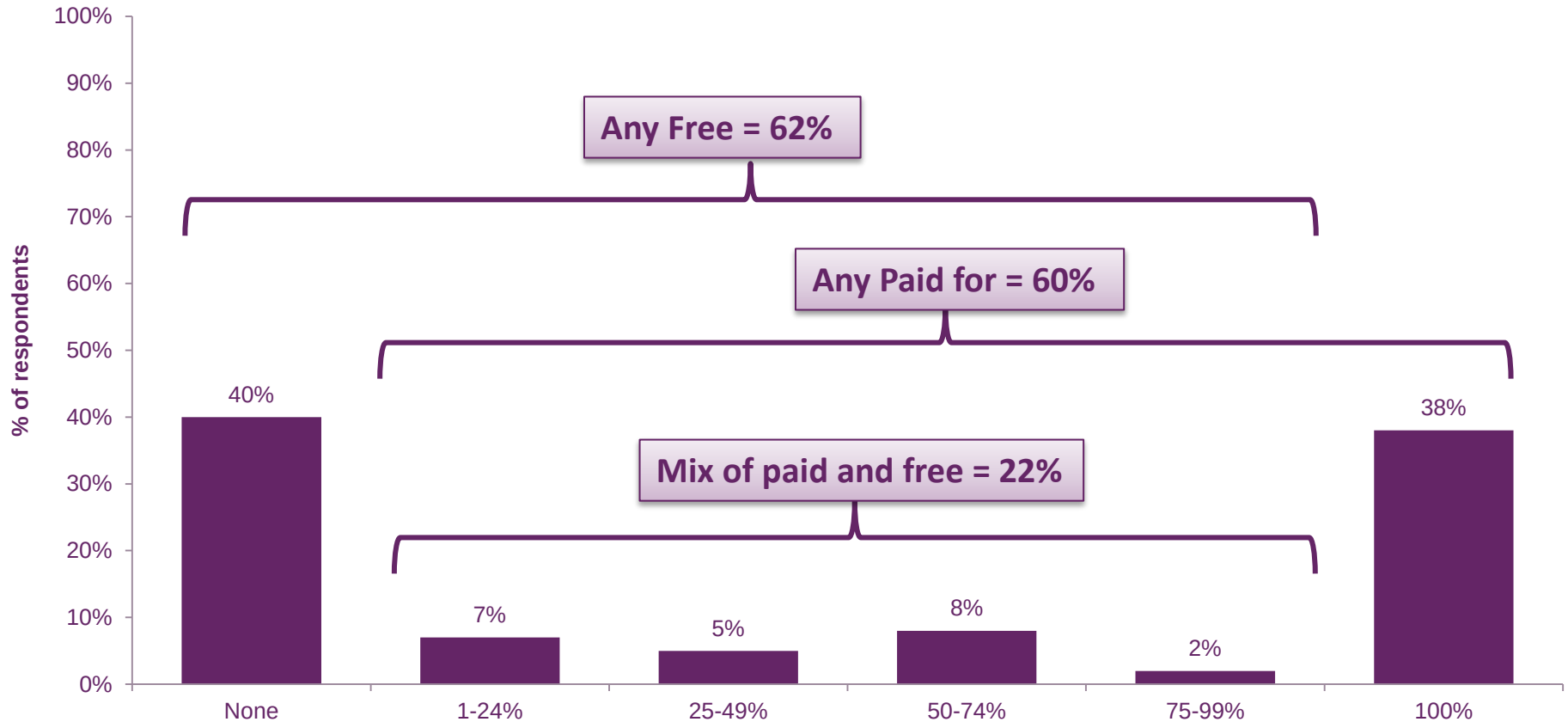


Question: Question wording

Base: Base for respondent level percentages

Slide VG10: Proportion of downloaded or accessed video games paid for

Sixty-two per cent of those who have downloaded or accessed video games in the past 3 months have done so for free, whilst 40% have consumed free video games only.



Question: QB2_5 .....How many did you pay for, either as a one off or as part of a subscription? (Shown as % of total number stated.)

Base: All who have downloaded or accessed video games in the past 3 months (533).

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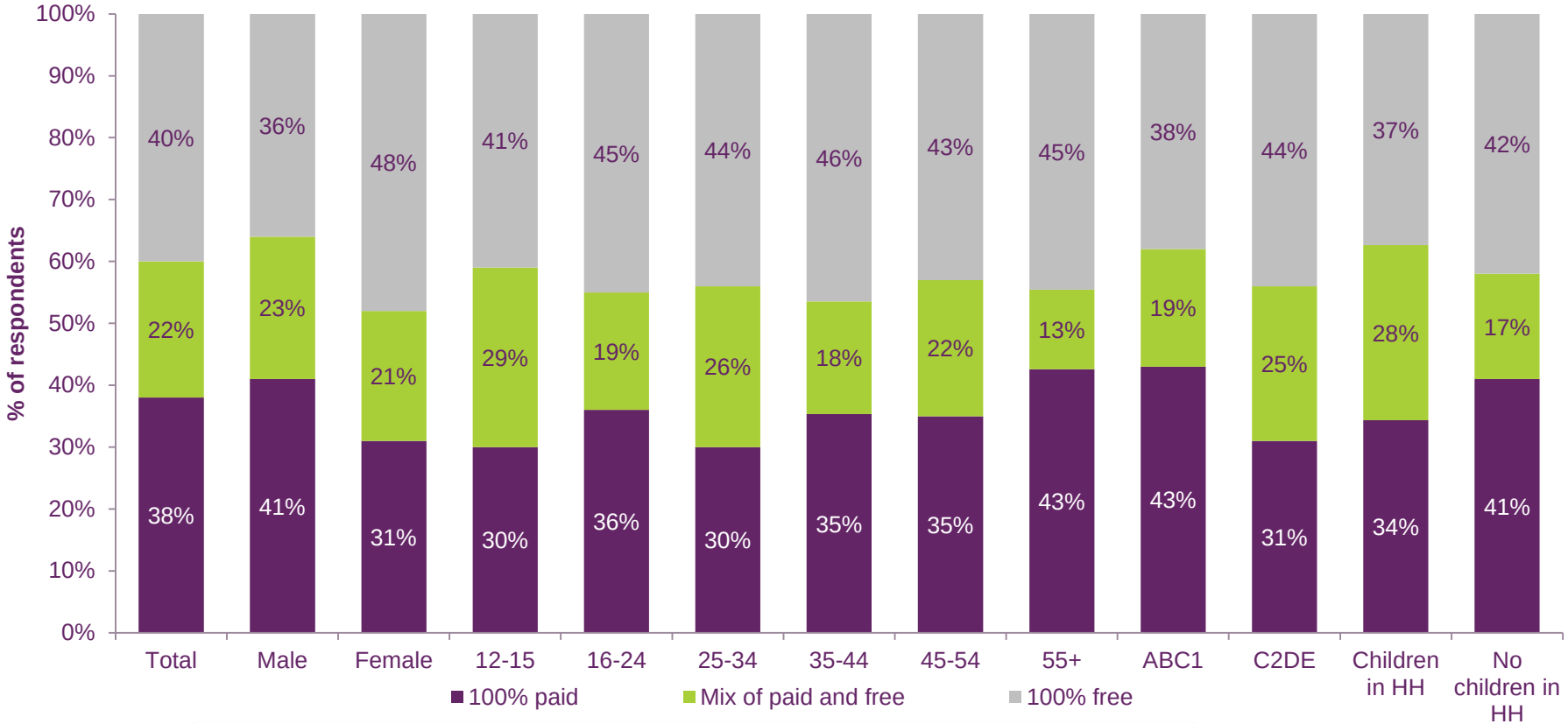
Slide VG11: Penetration of payment groups amongst demographics

Females are the most likely to consume free video games only (48%). Males are more likely to have paid for all of them (41%).



Mean (median) Number of video games	5 (2)	Total = 14 (6) Paid = 4 (3) Free = 10 (4)	7 (2)

Question: QB2_5 .....How many did you pay for, either as a one off or as part of a subscription?

Base: All who have downloaded or accessed video games in the past 3 months (533) Male (370) Female (163) 12-15 (216) 16-24 (105) 25-34 (92*) 35-44 (57*) 45+ (63*) ABC1 (175) C2DE (142) children in HH (328) No children in HH (205). *Caution base under 100.

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Slide VG12: Comparative profile table of payment groups

Despite the fact females are more likely to access all their video games for free, all three behaviour groups are predominantly male.

Profiles	100% paid	Mix of paid and free	100% free
Base	424	339	918
Male	74%	70%	62%
Female	26%	30%	38%
12-15	11%	18%	14%
16-34	63%	60%	56%
35-54	22%	21%	26%
55+	4%	2%	4%
ABC1*	70%	56%	59%
C2DE*	30%	44%	41%
Children in household	40%	57%	41%
No Children in household	60%	43%	59%

Question: QB2_5 …..How many did you pay for, either as a one off or as part of a subscription?

Base: As above.

*Note that Social Grade is not included for 12-15 year olds so profile is amongst 16+ year olds.

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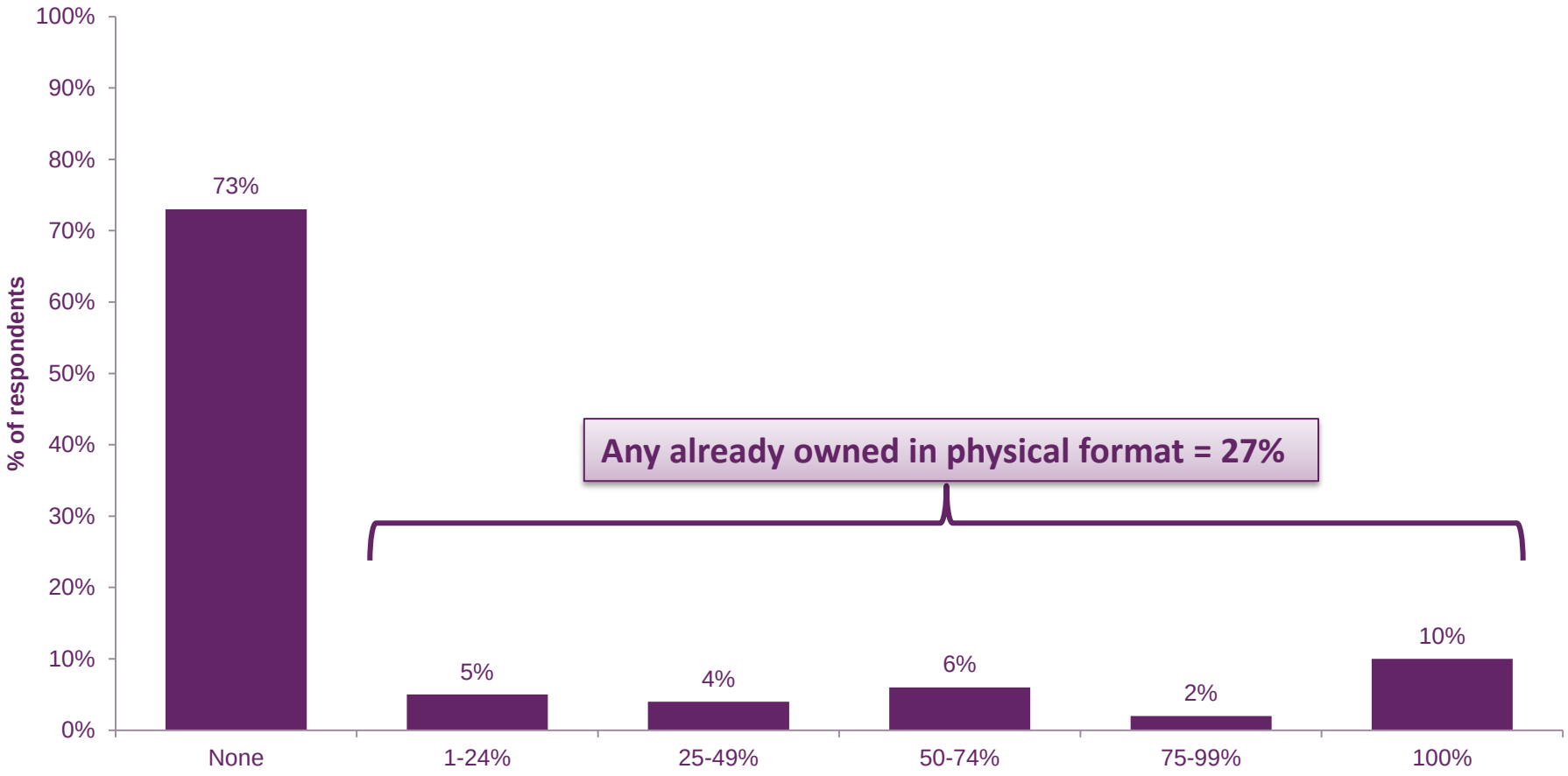
Slide VG13: Proportion of downloaded or accessed video games already owned in physical format

Twenty-seven per cent of those who have downloaded or accessed video games online claimed they already owned at least one of them in physical format.



Question: QB2_5 How many did you already own on <physical formats>?

Base: All who have downloaded or accessed video games in the past 3 months (533).

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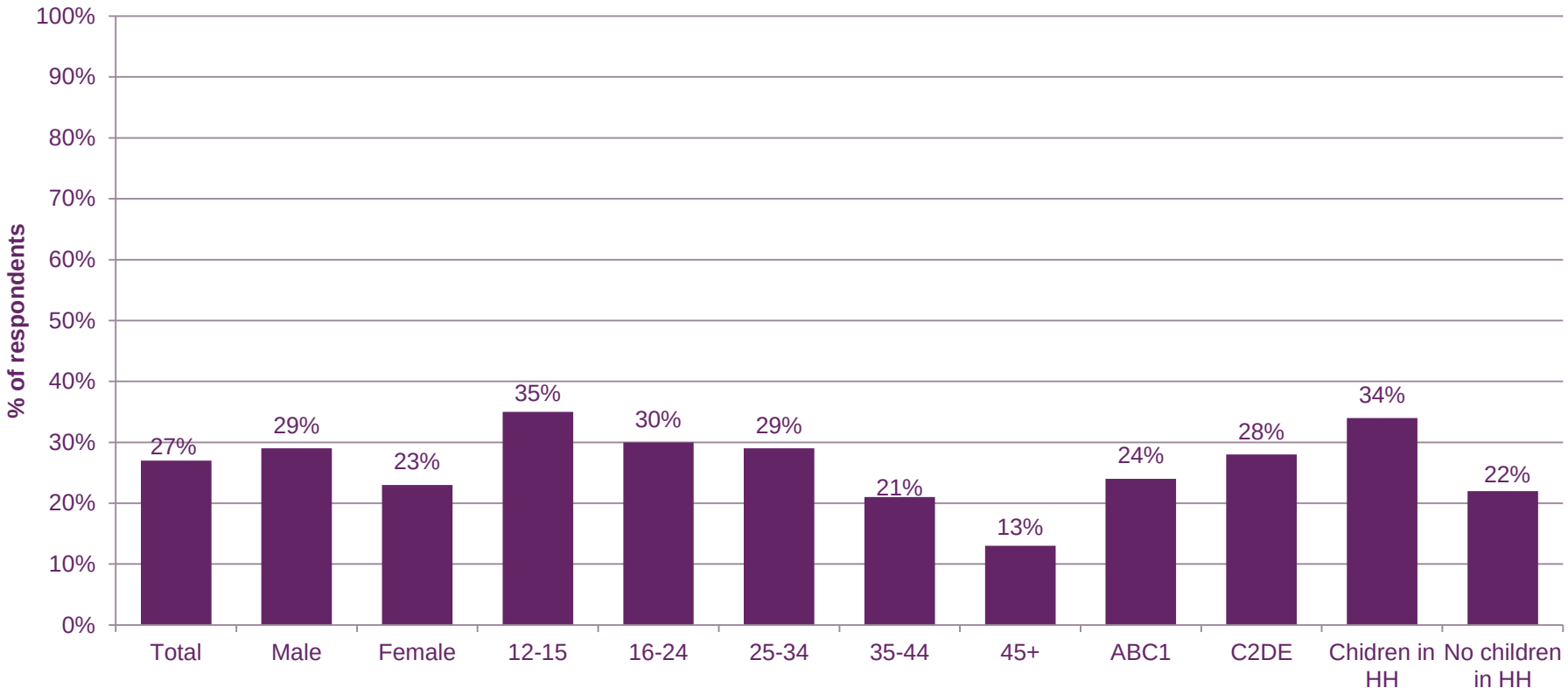
Slide VG14: Acquired any video games online previously owned in a physical format, by demographic

12-15 year olds are the most likely to claim they have downloaded or accessed video games that they already own physically (35%).



Question: QB2_6 …How many of these had you previously downloaded or accessed online for free?

Base: All who have downloaded or accessed video games in the past 3 months (533) Male (370) Female (163) 12-15 (216) 16-24 (105) 25-34 (92*) 35-44 (57*) 45+ (63*) ABC1(175) C2DE (142) Urban (447) rural (58*) Children in HH (328) No children in HH (205) .*Caution base under 100.

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Slide VG15: Proportion of paid video games previously downloaded or accessed for free

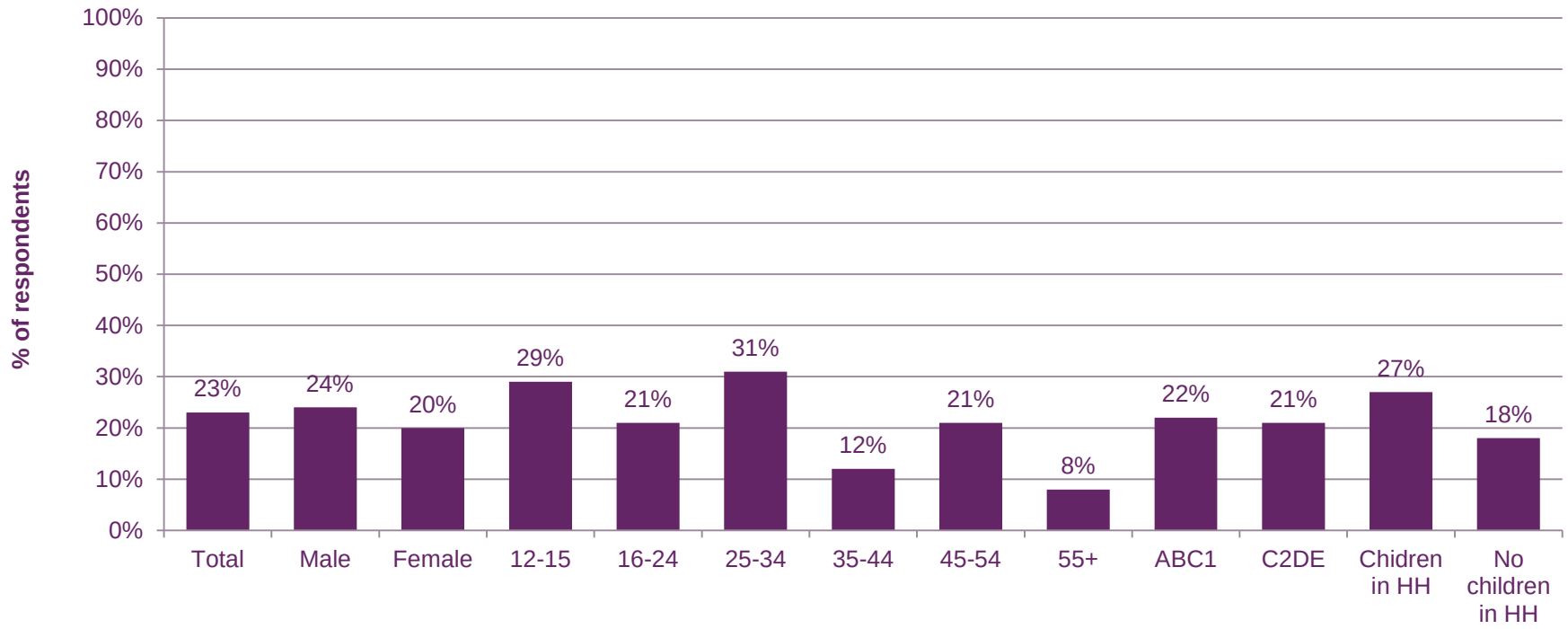
Twenty-three per cent of those who have paid for video games online claim they had consumed at least some of them for free previously.

Question: QB2_6 …How many of these had you previously downloaded or accessed online for free? (Shown as % of total number stated)

Base: All who have paid for video games (any format) in past 3 months (1,063).

Slide VG16: Any paid video games previously downloaded or accessed for free amongst demographics

12-15s and 25-34s are the most likely age groups to claim they have accessed video games for free before paying for them.



Question: QB2_6 …How many of these had you previously downloaded or accessed online for free?

Base: All who have paid for video games (any format) in past 3 months (1,063) Male (694) Female (369) 12-15 (411) 16-24 (174) 25-34 (176) 35-44 (143) 45-54 (108) 55+ (*51) ABC1 (330) C2DE (322) Children in HH (711) No children in HH (352). *Caution base under 100.

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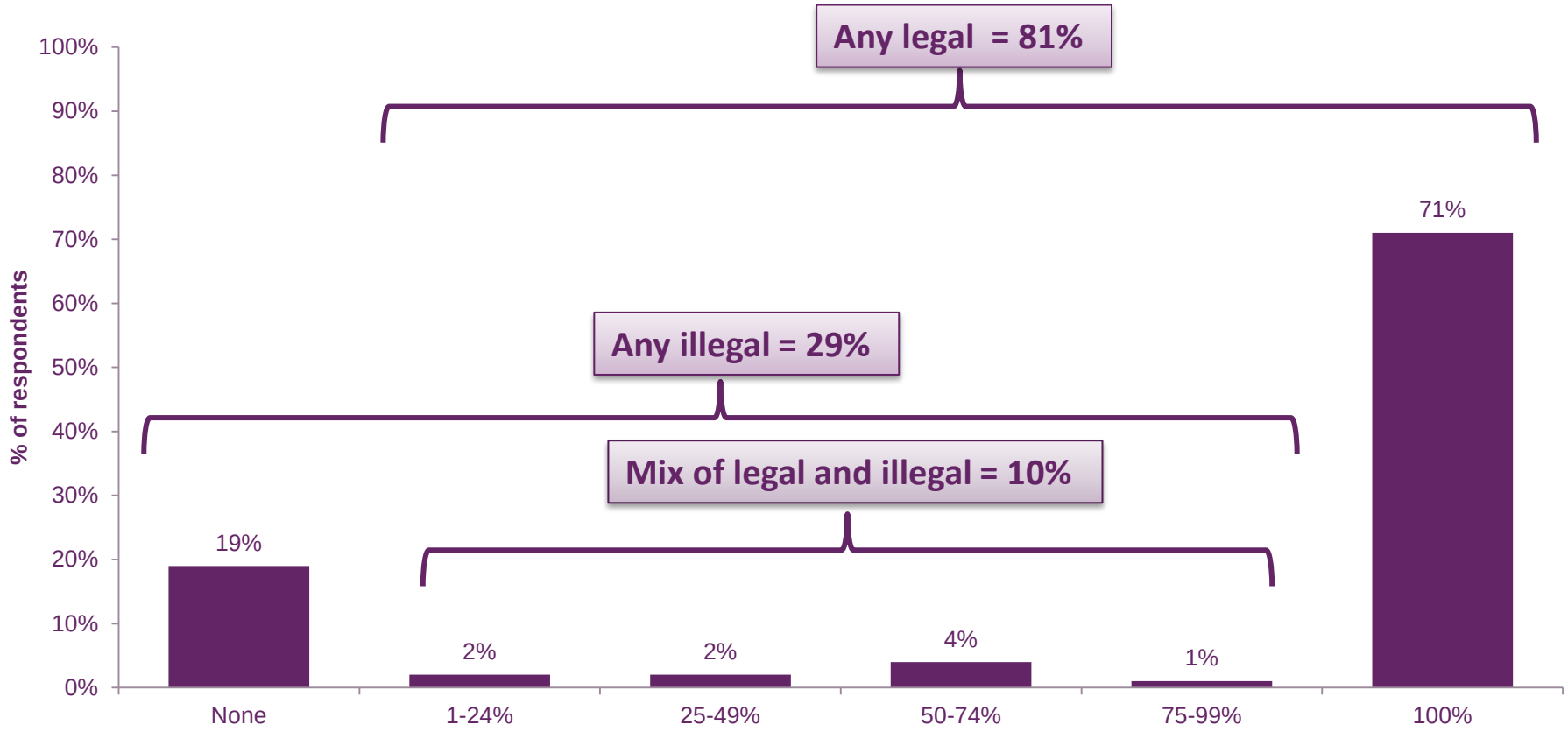
Slide VG17: Estimated proportion of free digital video games (last 3 months) that was obtained legally/ illegally

Twenty-nine per cent of those who have obtained free video games online indicate that at least some of it was done so illegally – 19% all of it.

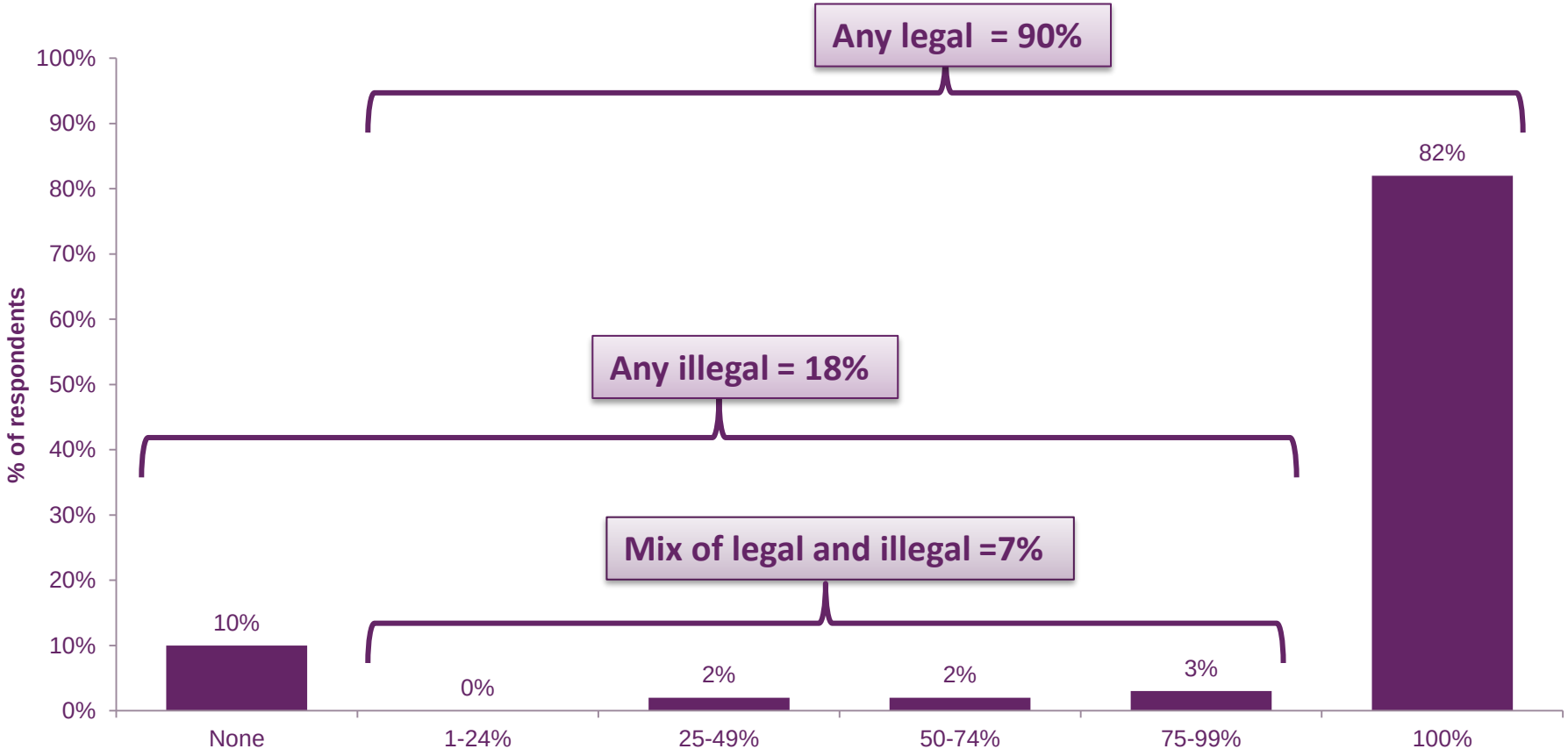


Question: QB2_7 ……How many of these do you think were done so legally?

Base: All who have downloaded or accessed video games for free in the past 3 months (348).

Slide VG18: Estimated proportion of all digital video games (last 3 months) that was obtained legally/ illegally

Of all those who said they have downloaded or accessed video games online, 18% indicated that at least some of it was done so illegally (10% all of it).



Question: QB2_7 ……How many of these do you think were done so legally?

Base: All who have downloaded or accessed video games (paid or free) in the past 3 months (534).

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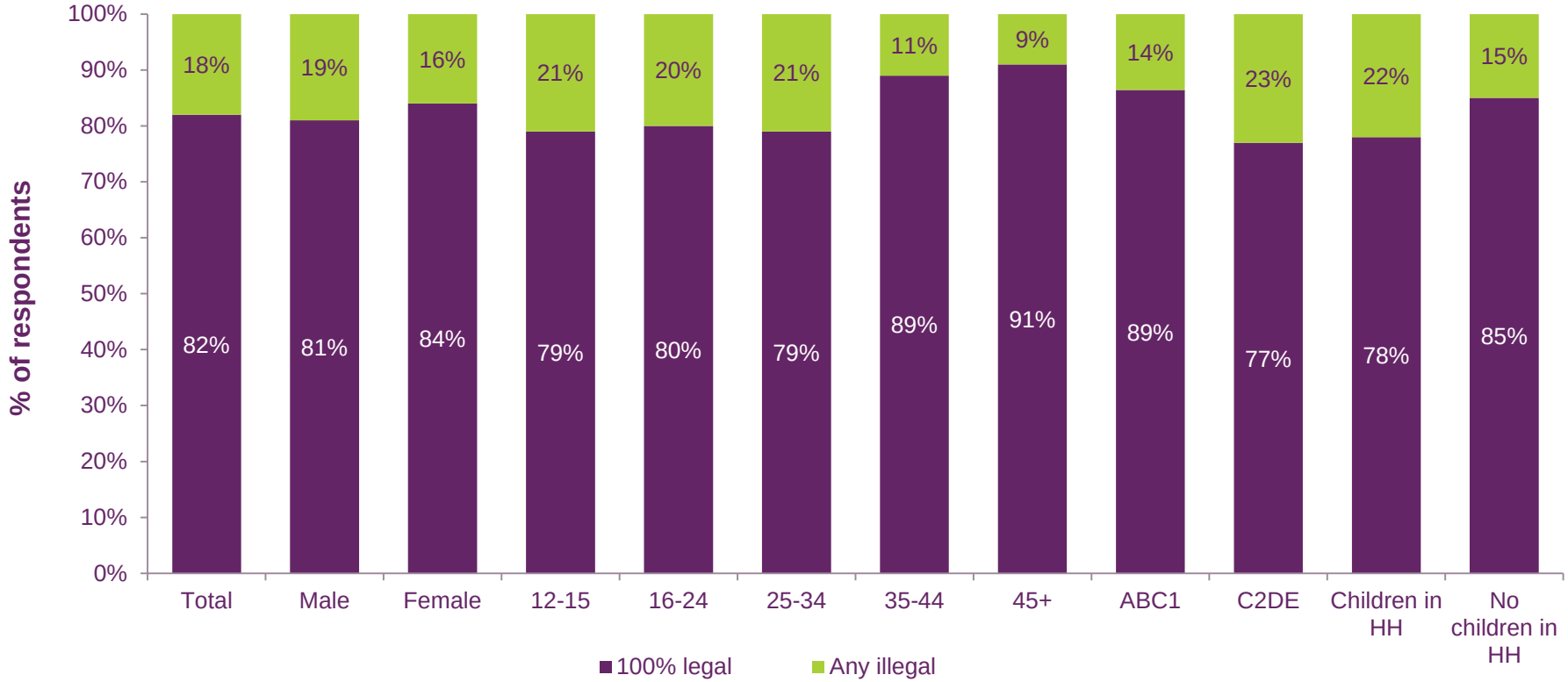
Slide VG19: Legality groups amongst demographics

Under 34s, C2DEs and those with children in the household have the highest proportions of illegal video games behaviour.



Mean (median) Number of video games	7 (3)	Total = 13 (4) legal = 5 (0) Illegal = 8 (2)

Question: QB2_7 .....How many of these do you think were done so legally?

Base: All who have downloaded or accessed video games in the past 3 months (533) Male (370) Female (163) 12-15 (216) 16-24 (105) 25-34 (92*) 35-44 (57*) 45+ (63*) ABC1 (175) C2DE (142) Urban (447) Rural (58) Children in HH (328) No children in HH (205)
Note: Bases too small to split down legal groups further *Caution base under 100.

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Slide VG20: Comparative profile table of legality groups

Illegal behaviour is even more skewed towards males and 16-34s than 100% legal, but the social grade profile is more even.

Profiles	100% legal	Any illegal
Base	433	100
Male	67%	73%
Female	33%	27%
12-15	13%	16%
16-34	58%	69%
35-54	25%	13%
55+	4%	2%
ABC1*	65%	51%
C2DE*	35%	49%
Children in household	42%	54%
No children in household	58%	46%

Question: QB2_7 ……How many of these do you think were done so legally?

Base: As displayed on table

*Note that Social Grade is not included for 12-15 year olds so profile is amongst 16+ year olds.

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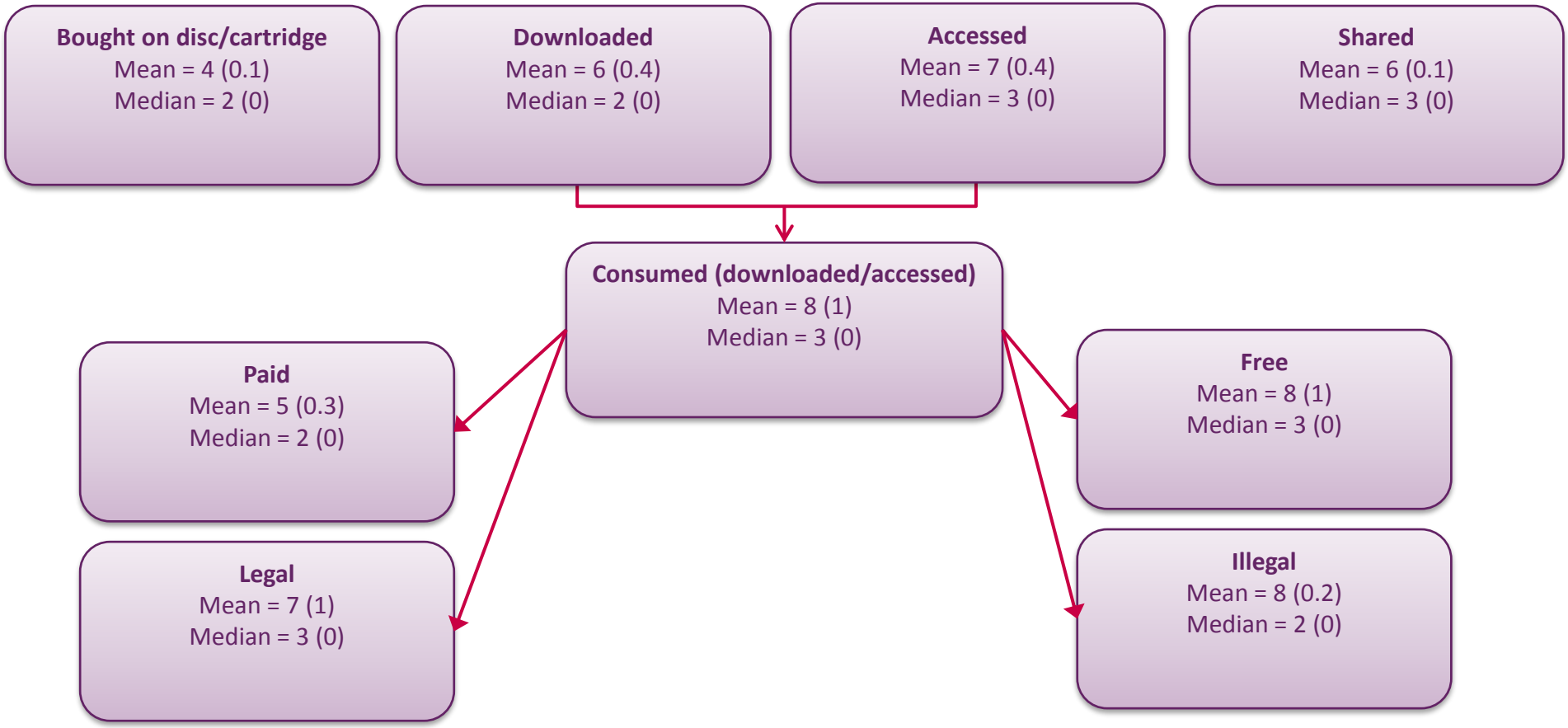
Slide VG21: Average number of video games volume summary (last 3 months)

The mean figures can be slightly misleading as the standard deviation is so high – the average for illegal files is higher than legal, but the median is lower.

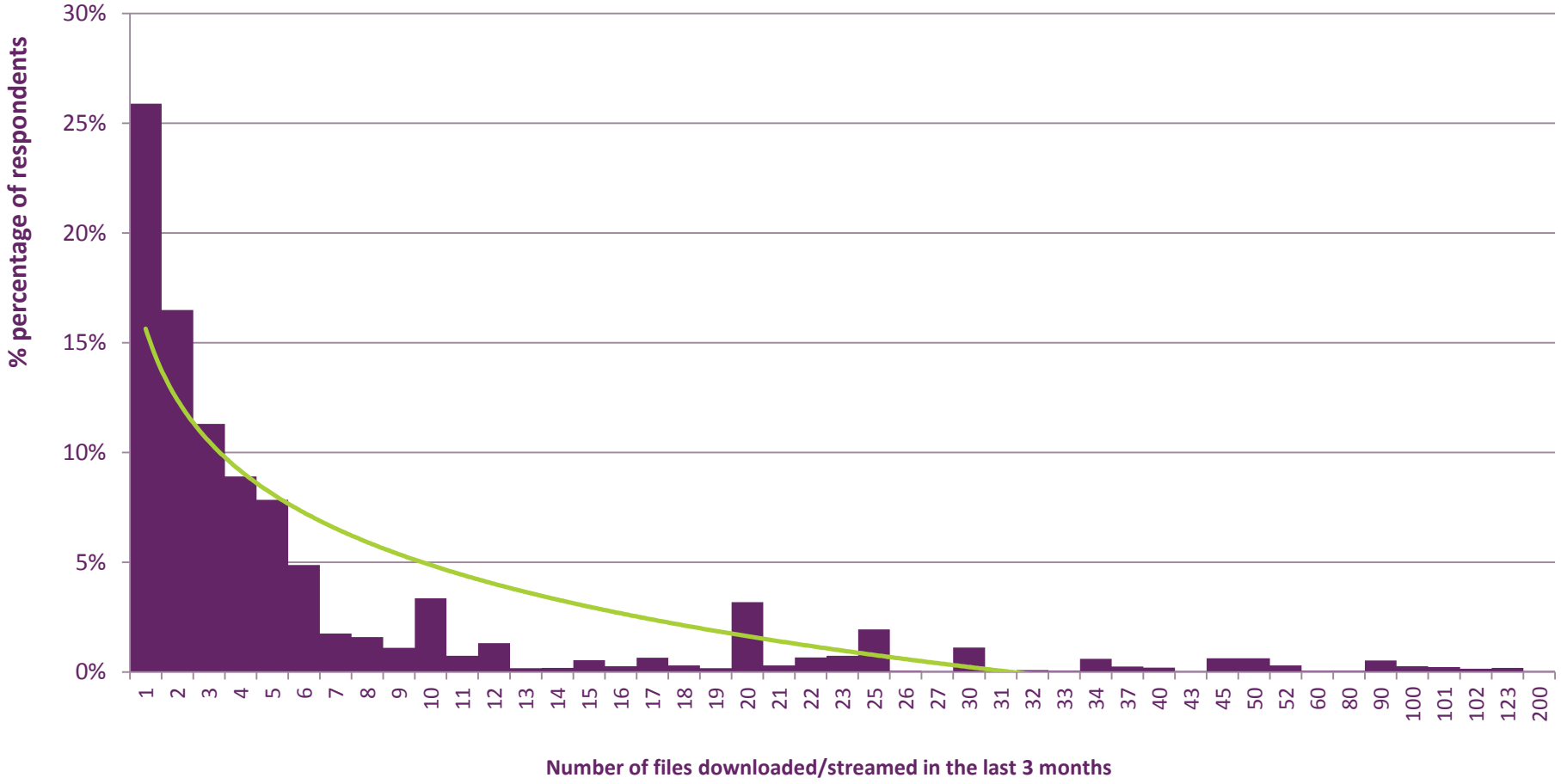


Question: Various

Base: All figures based on those who have done each activity in the last 3 months (In brackets all internet users).

Slide VG22: Number of video games downloaded or streamed in the past 3 months

A small number of respondents downloaded or accessed a large number of video games in the past 3 months; 70% consumed five or fewer.



Question: QB2_3 How many have you downloaded/streamed in the last 3 months?

Base: All who have downloaded or accessed video games in the past 3 months (533).

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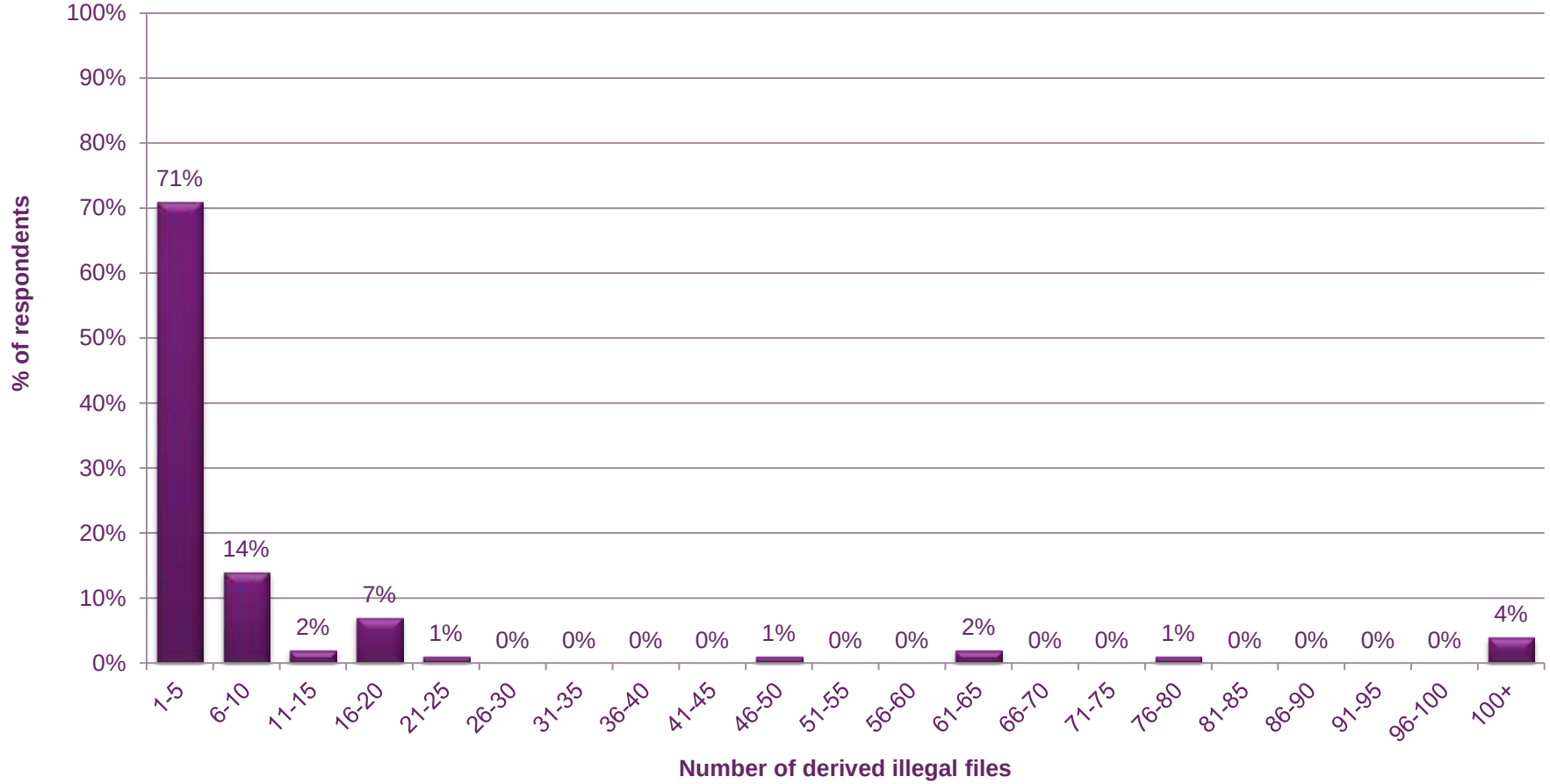
Slide VG23: Number of files downloaded or accessed illegally in last 3 months

Seventy-one per cent of people who have downloaded or accessed video games illegally have acquired between 1 and 5 in the last 3 months.



Question: QB2_7 ....How many of these do you think were done so legally?

Base: All 12+ in the UK that have downloaded/accessed any files illegally (100).

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Slide VG24: Total video games volume summary (last 3 months)

At a total volume level, 55% of computer software products downloaded, accessed or purchased are 'digital', 35% obtained for free, and 10% obtained illegally.

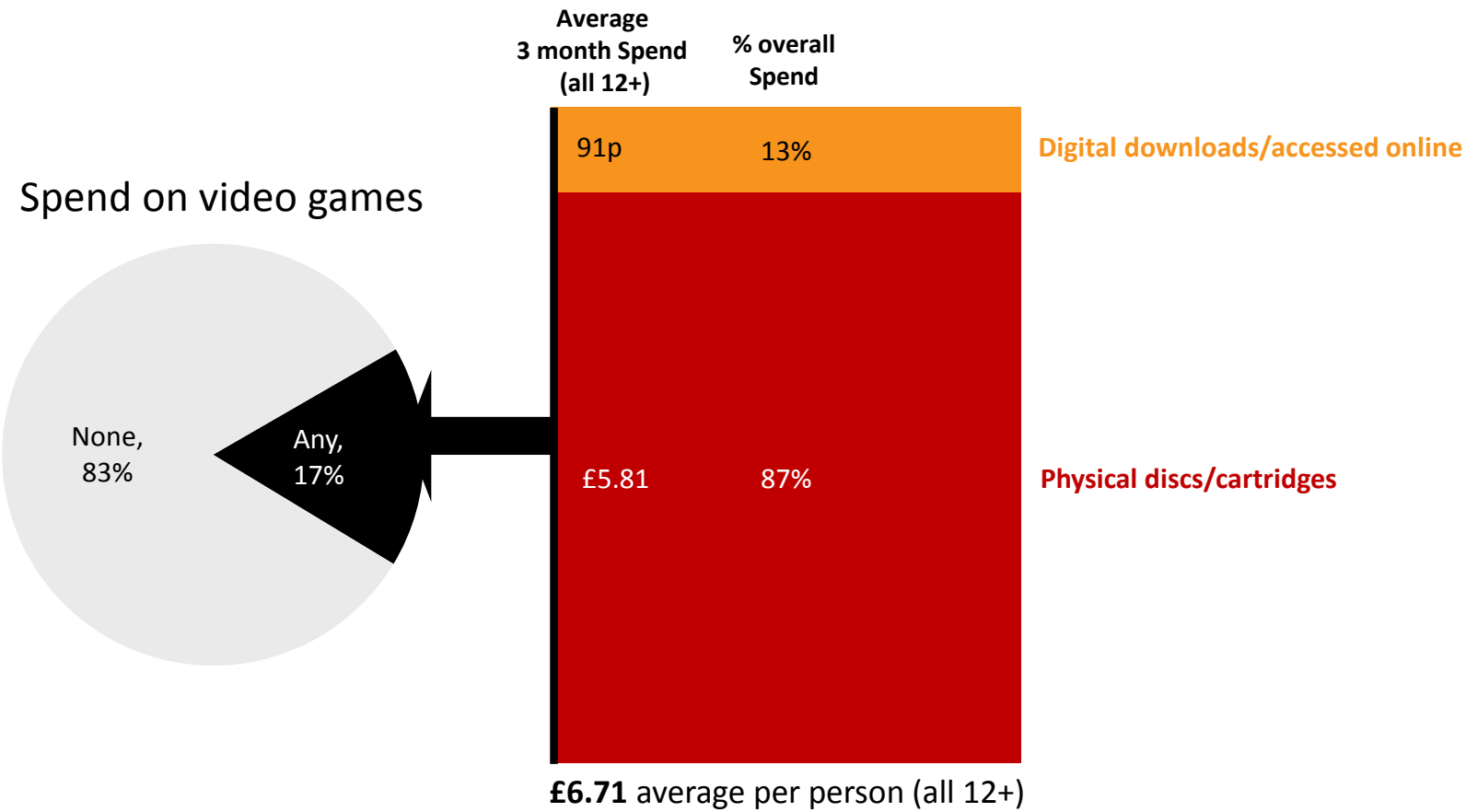
Question: Various

Base: All 12+ in the UK (5099).

Digital signifies files downloaded or accessed online
Physical signifies those bought on disc
Physical copies assumed as paid and legal
Paid digital files assumed as legal

Slide VG25: Proportion of the population who have spent anything on video games, and split of spend

Eighty-seven per cent of video game spend comes from physical copies bought.



Question: QB2_1A/B Approximately how much have you spent in the past 3 months on…?

Base: All 12+ in the UK (5099).

Total music spend estimation = £359 million

Slide VG26: Average Spend in the last 3 months amongst legality groups

Spend on the video games is lower amongst those who have downloaded or accessed any illegal content than those who haven't.

	100% legal	Any illegal
Physical disc or cartridge	£23.97	£15.83
Individual digital	£10.54	£9.17
TOTAL SPEND	£34.51	£25.00

Question: QB2_1A/B Approximately how much have you spent in the past 3 months on…?

Base: All 12+ in the UK that have downloaded/accessed 100% legally (433) Any illegal (100).

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Slide VG27: Confidence limits for total spend and total number of video games downloaded or accessed

This table shows the confidence limits at the 99% level for mean spend on the category and total number of items consumed online (both illegal and legal):

Base		Lower	Mean	Upper
	Total video games spend in last 3 months (£)			
5099	All aged 12+	£6.47	**£6.71**	£6.96
433	100% legal	£32.56	**£34.51**	£36.46
100	Any illegal	£20.82	**£25.00**	£9.19
	Total number of video games downloads or accessed in last 3 months			
533	All downloaded or accessed games	7	**8**	9
433	100% legal	6	**7**	7
100	Any illegal	11	**13**	15

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