

ONLINE COPYRIGHT INFRINGEMENT  
IN THE EUROPEAN UNION  
MUSIC, FILMS AND TV (2017-2018), TRENDS AND DRIVERS  
EXECUTIVE SUMMARY



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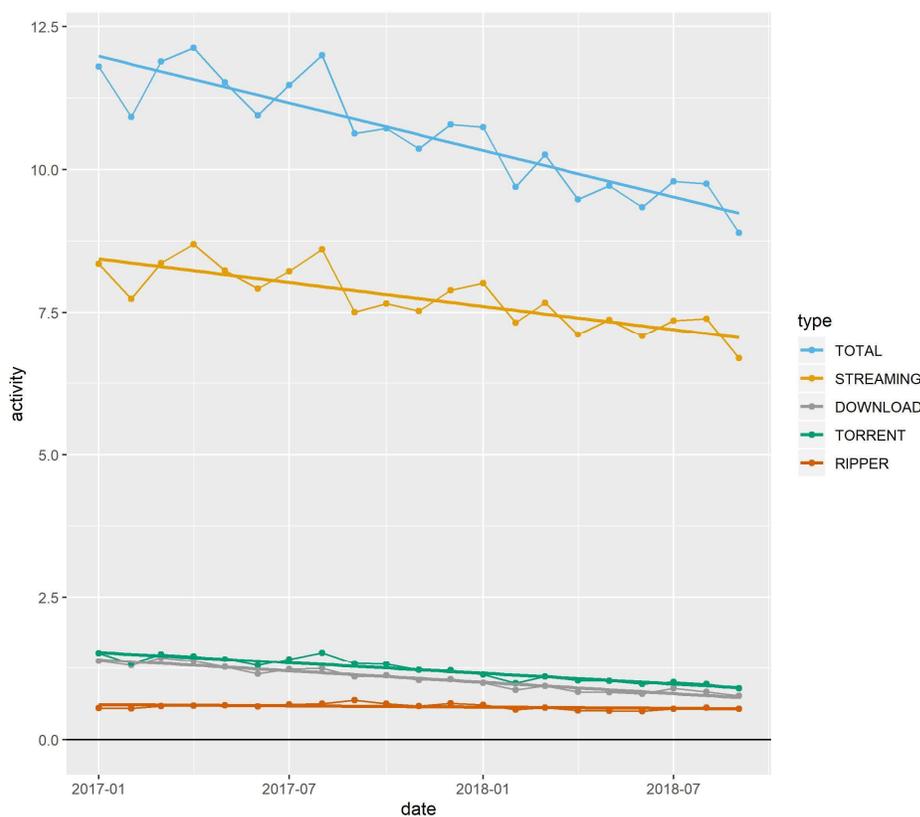
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## EXECUTIVE SUMMARY

This report examines consumption of copyright-infringing content in the 28 EU Member States, for TV programmes, music and film, using a variety of desktop and mobile access methods, including streaming, downloading, torrents and ripping software. The report consists of two parts, a descriptive analysis of the trends in consumption of infringing content, and an econometric analysis of the factors that influence differences in piracy rates among the EU Member States.

The analysis is based on a rich set of data on access to pirated music, film and TV programmes in all 28 Member States, for the period January 2017 to September 2018. The data covers both fixed and mobile devices, as well as the main access methods: streaming, downloads, torrents and stream ripping.

The good news in this report is that digital piracy is declining, as shown in the figure below. Between 2017 and 2018, overall access to pirated content declined by 15 %. The decline was most pronounced in music, at 32 %, followed by film (19 %) and TV (8 %).



However, piracy remains a significant problem, more so in some Member States than in others. The average internet user in the EU accessed pirated content 9.7 times per month in 2018, ranging from almost 26 times per month in Latvia and Lithuania to less than 4 times per month in Finland.

The econometric analysis in Section 5 seeks to explain those differences among the Member States. Based on a review of the existing literature and available data sources, a number of factors that could influence consumption of pirated content in a given country were examined. These factors included socio-economic variables (income levels, education, inequality, unemployment); demographic variables such as the proportion of young people in the population; variables related to the features of the relevant marketplace, including market size, the extent of the internet infrastructure and the number of legal offers available for the various types of content; and attitudes towards intellectual property infringement, as reported in the IP Perception study published by the EUIPO.

Among the socio-economic factors, the level of **income per capita** and the extent of **inequality** seem to have the greatest impact on consumption of pirated content: high per capita income and low degree of income inequality are associated with lower levels of illicit consumption. The overall **size of the market**, as measured by the number of internet users in a country, also matters: the average consumption of pirated content is lower, all other things being equal, in larger Member States. A higher **acceptance of digital piracy**, as evidenced in the IP Perception study, is also associated with a higher level of consumption of pirated content.

Some of the other variables examined also seemed to have an impact on consumption of pirated content, but this impact was not clear-cut. For example, **awareness of legal offers** (as reported in the IP Perception study) appears to reduce consumption of pirated film but increase consumption of pirated TV content, while there was no statistically significant impact on music consumption. It seems that the relationship between legal offers and piracy is a complex one and warrants further study.

A follow-up study, to be carried out in 2020, will examine the consumption of individual pirated film titles in all 28 Member States, possibly compared to legitimate consumption of the corresponding content (e.g. box office revenues).