

ONLINE COPYRIGHT INFRINGEMENT IN THE EUROPEAN UNION

MUSIC, FILMS AND TV (2017-2020), TRENDS AND DRIVERS EXECUTIVE SUMMARY



EXECUTIVE SUMMARY

This report examines the consumption of copyright-infringing content in the EU Member States and the UK⁽¹⁾ for TV programmes, music, and film, using a variety of desktop and mobile access methods, including streaming, downloading, torrents and ripping software. The report has two parts, a descriptive analysis of the trends in the 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 websites offering pirated music, film and TV programmes in all 28 Member States, between January 2017 and December 2020. The dataset includes over 240 thousand aggregates⁽²⁾ for a total of 133 billion accesses.

The report's main conclusion is that digital piracy is declining for all types of content, as shown in Figure 1 and Table 1 below. Except for a temporary increase in film piracy in the spring of 2020, the decline continued during the COVID pandemic: piracy decreased by 20 % in 2018, by 6 % in 2019 and by 34 % in 2020⁽³⁾.

⁽¹⁾ The UK is included in this study because it was a Member State of the European Union during most of the period covered by the report and was included in the previous report covering 2017 to 2018.

⁽²⁾ Exactly 241 920 aggregates.

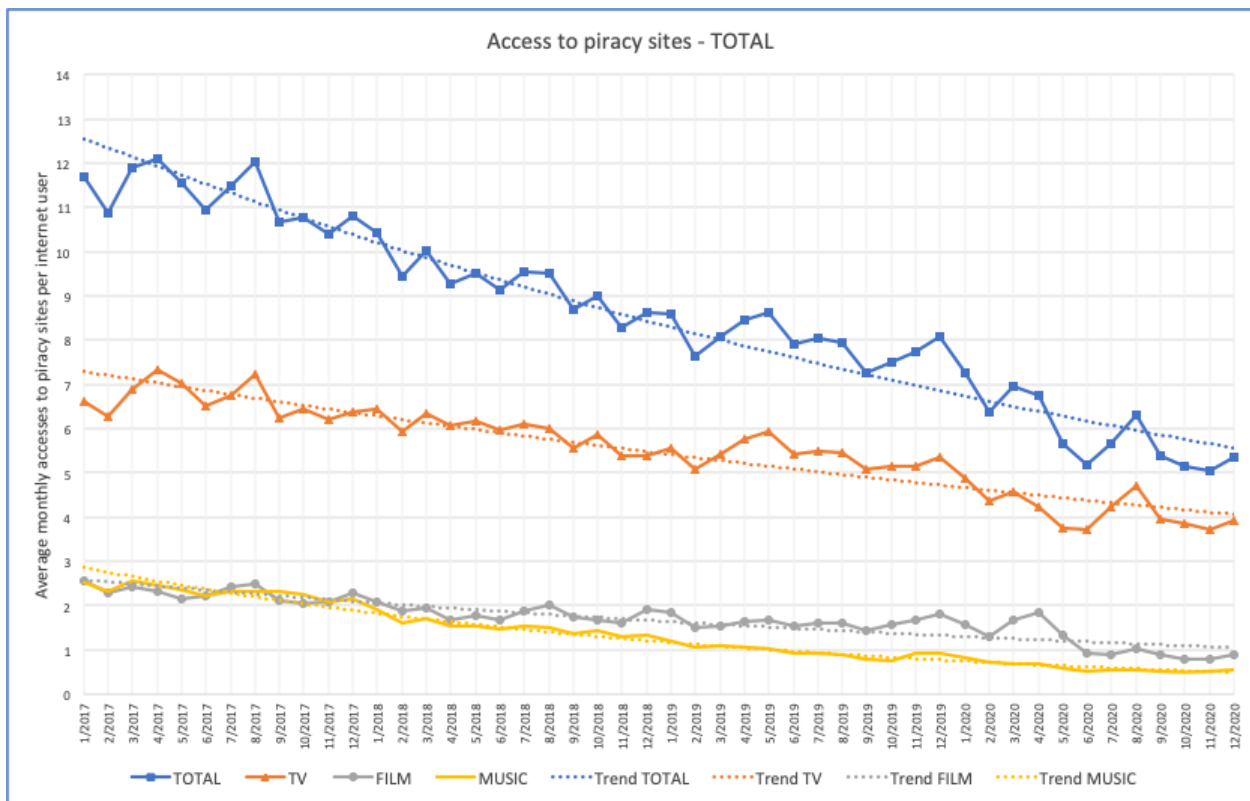
⁽³⁾ The rates of change were calculated by comparing the December figures of each year with the corresponding figures from the previous year. Since no data was available for December 2016, the 2017 rate of change was calculated by comparing January 2018 with January 2017.

Table 1 – Annual changes in access to pirated content, 2017 to 2020

	TOTAL	TV	FILM	MUSIC
2017*	-10.9 %	-2.9 %	-18.9 %	-23.5 %
2018	-20.1 %	-15.2 %	-16.4 %	-38.4 %
2019	-6.3 %	-1.0 %	-4.7 %	-30.2 %
2020	-33.8 %	-26.9 %	-50.6 %	-40.9 %

*January 2018 v January 2017

Figure 1 – Piracy trends EU28, 2017 to 2020



Access to pirated content in the EU halved between 2017 and 2020. The decline was particularly pronounced in music, with accesses to pirated content having fallen by 81 %. Film piracy fell by 68 % and TV piracy by 41 % during the same period.

There were significant differences among the Member States. The average internet user in the EU accessed copyright-infringing content 5.9 times per month during 2020. Latvian users accessed illegal sites almost twice as often, whilst Polish users did so 3.8 times per month. Overall, Austria, Finland, France, Germany, Italy, the Netherlands, Poland, Romania, Spain and the UK, were below the EU average.

The econometric analysis in Section 5 seeks to explain these differences among the Member States and over time. Based on a review of the existing literature and available data sources, a number of factors that could influence the consumption of pirated content in a given country were examined⁽⁴⁾.

Among the socio-economic factors, the level of **inequality** and **income per capita** seem to have the greatest impact on the consumption of pirated content: high per capita income and a low degree of income inequality are associated with lower levels of illicit consumption, holding other factors constant.

A higher **acceptance of digital piracy**, as evidenced by responses to the relevant questions in the IP Perception study, is also associated with a higher level of consumption of pirated content. In countries with similar levels of income and inequality, piracy tends to be higher in those countries in which a greater proportion of the public consider piracy an acceptable option if there is no legal offer available (as reported in the IP Perception study), especially in the case of music piracy.

The **awareness of legal offers** (as reported in the IP Perception study) appears to reduce consumption of pirated content. Likewise, the **number of legal platforms** for films and TV channels also reduces the consumption of pirated content (this effect cannot be tested in the case of music because the number of platforms has remained stable during the period in almost all of the countries).

In addition, there is a positive association between the **proportion of young people** (aged 15 to 24) in a country's population and the extent of film piracy.

⁽⁴⁾ The results of the econometric analysis are significantly more robust in this study than in the previous (2019) study. The additional data available has enabled the use of more advanced statistical techniques than those available in the earlier study.