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copyright and creativity

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INDUSTRY TRUST FOR IP AWARENESS 2013 ANNUAL REVIEW SUMMARY

Why the Trust is more ambitious than ever

AN EVOLVING CHALLENGE

The rapid take-up of digital film and TV over the last 12 months is changing the shape of our infringement challenge beyond recognition. Just five years ago we used Knock-Off Nigel to stigmatise infringement among content-hungry, cash-poor young men. As mum, dad and even grandma are embracing new technologies, so the opportunities for them to access infringing content grows.

While still in the minority, all of our research suggests that those who infringe content pose a disproportionate risk to our industry – and one that bites right across our product's lifecycle: they're our most valuable customers; the cinema fans; disk collectors and gifters, and the digital service subscribers.

AN EMERGING OPPORTUNITY

At face value the outlook is bleak, but a closer look suggests it is anything but. These are people who are passionate about the content we create. The vast majority are prepared to pay, in principle, but in practice infringing digital services can seem temptingly convenient – and where older audiences are concerned, confusion about what is (and isn't) legal is rife.

It's invaluable that as an industry we nudge them in the right direction. Education makes this possible. It enables us to make a positive intervention just when it matters most; inspiring people to make a positive choice and steering them away from infringing sites into legal content services.

SPENDING SMARTER

We made a conscious choice this year to refocus our members' investment. While seeking to keep a lid on the serial, male infringer, we cast the net wider to encompass the new faces navigating digital entertainment for the first time: the family gatekeepers like mum and dad, and pre-teens who are just starting to explore entertainment online. These emerging infringers feel positive towards our industry and are less engaged in infringement, presenting us with a greater opportunity to make a difference.

We also said we'd find ways to deliver campaigns that make our members' investments work even harder: that are increasingly cost-efficient at shifting attitudes and behaviour, while also *directly* supporting sales. To achieve this we've capitalised on our own,



powerful assets to harness value from owned and earned media channels: we've cascaded our *Moments Worth Paying For* message through this year's hero titles, for example, and we've launched landmark Findanyfilm partnerships that deliver the point of purchase direct to film fans in a variety of online environments.

DELIVERING MORE, TOGETHER

This ambitious new approach is working. We've maintained the impact of our *Moments Worth Paying For* campaign on audiences attitudes and behaviour – continuing to increase people's propensity to pay for content – but have done so while delivering a two-fold increase in Return-On-Investment (ROI) compared to last year. For every £1 our members invested in the campaign in the last 12 months we've delivered £37 worth of media value. While our overall ROI across *all* Trust spend – from our campaigns to our running costs – now stands at 10:1.

But these are not our achievements. They are yours. Our continued success is only possible because of the unique, collaborative approach our industry takes to tackling the ever-more complex challenge of infringement. Bringing all of our sectors together to speak to our audiences with one, powerful voice continues to prove critical.

So I would like to recognise our members and a growing body of partners and supporters for making all of this progress possible. Because as our challenge continues to broaden and evolve, treading water on education simply isn't an option. With your vital contributions we can continue to create new opportunities, strive for better results and forge new relationships. We can make landmark moves today that influence consumers' choices – and benefit our industry – for many years to come.

Because of you, we can be more ambitious than ever. Thank you.
Liz Bales, Director General, Industry Trust for IP Awareness



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FIVE FIRSTS FOR 2013

● **Moments Worth Paying For:** At nearly three years old, our Moments trailer campaign has realised its full potential. Thanks to members' support we harnessed this year's hottest titles to deliver a rich array of messages that promote the entertainment value behind the price of our product. Iron Man 3 highlighted special effects mastery; Despicable Me 2 celebrated the value of shared movie experiences while Anchorman 2 deployed Ron Burgundy's persuasive powers to inspire film fans to play fair.

We enjoyed our best comprehension scores yet, while those exposed to the campaign are up to twice as likely to pay for official content as those not exposed to it.



● **Findanyfilm gets a front row seat:** We've launched landmark partnerships that have transformed FindAnyFilm from a useful destination for film fans to visit, to a powerful intervention tool; actively seeking and connecting them with where they can buy legal content. Our strategy is to take the point of purchase direct to film fans to circumvent the need for Internet search: reducing the risk of confusion (and temptation) by reducing exposure to infringing sites.

A landmark partnership with Yahoo! Movies UK and Ireland means millions of film fans are now just a click away from purchasing the real deal when they enjoy any Yahoo film review.



● **Youth gets a boost:** Our established ScreenThing community reached 18 million young people in the last two years alone, through the Facebook page, media partnerships and associated PR and education campaigns. But that's just the beginning. Our landmark partnership with Film Nation UK will enable us to take our proven formula to the next level: inspiring hundreds of thousands of young people to respect copyright by shining a spotlight on the talent, time and hard work it takes to make great films.

Half of ScreenThing fans directly attribute interaction with the community with being less likely to access infringing content in the future.



● **Doubled our parent power:** We set out to up-weight our impact among parents – and succeeded. Our concerted drive to educate parents about the safety implications of infringement has doubled our reach among this audience this year, through high impact but targeted PR and social activity. We've worked with credible partners and celebrity ambassadors to empower parents to police and promote responsible behaviour at home by providing tips and tools to navigate the digital landscape.

Supported by Internet safety charity, Childnet International, the BBFC and the BPI we delivered our safety messages to more than 80 million people through key parent titles this year.

● **Collaborative hat trick:** The Film Nation UK partnership brings a third, powerful collaboration into play for the Trust this year; alongside the Real Deal Fake-Free Markets campaign and the Content Map. These unique but effective initiatives bring a cross-section of sectors together to educate audiences about the importance of respecting copyright in a unified and uniquely powerful way, expanding our reach and delivering cost efficiencies.

The latest IP Crime Report, published by the IPO on 29 June, identified the Real Deal campaign as one of the three key achievements of the year.



FILM NATION UK

MEMBERS OF THE INDUSTRY TRUST

