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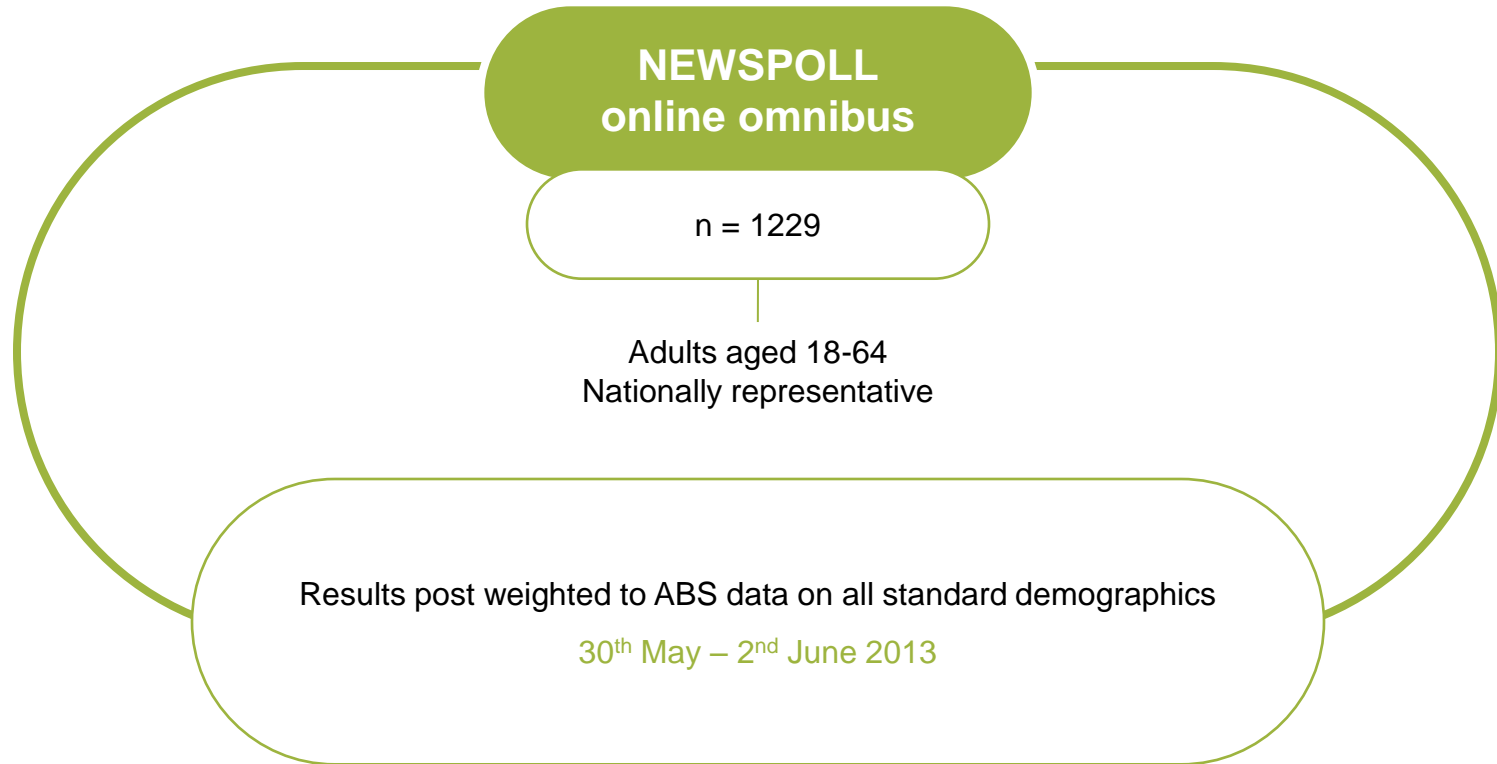
Project Ryan

Adults and Online Movie and TV Piracy

Quantitative Wave 5

2013

Methodology



A second look at frequency

- As in 2012 we have segmented the population by the frequency of their illegal behaviour
- **Persistent illegal downloaders:** Those who download or stream illegal movies or TV shows at a frequency of at least once a week
- **Casual illegal downloaders:** Those who download or stream illegal movies or TV shows monthly or less often (but not as frequently as once a week)
- **Lapsed illegal downloaders:** Those who have downloaded or streamed illegal movies or TV shows in the past but claim not to 'nowadays'
- **Non-illegal downloaders:** Those who have not downloaded or streamed illegally

Only 25% of adults pirate – it is not the norm

Persistent illegal
downloaders
11%



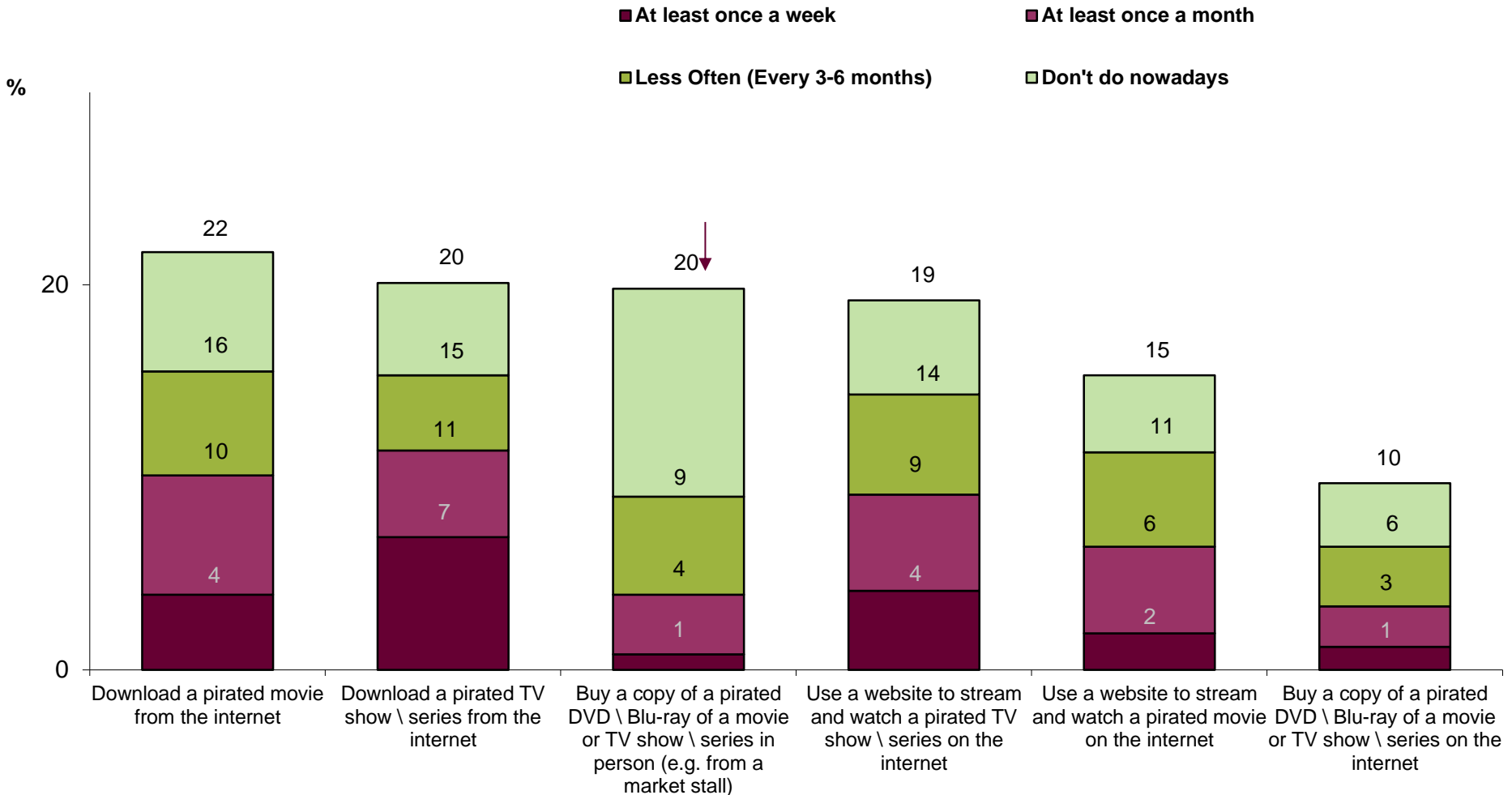
Casual illegal
downloaders
14%

Lapsed illegal
downloaders
8%

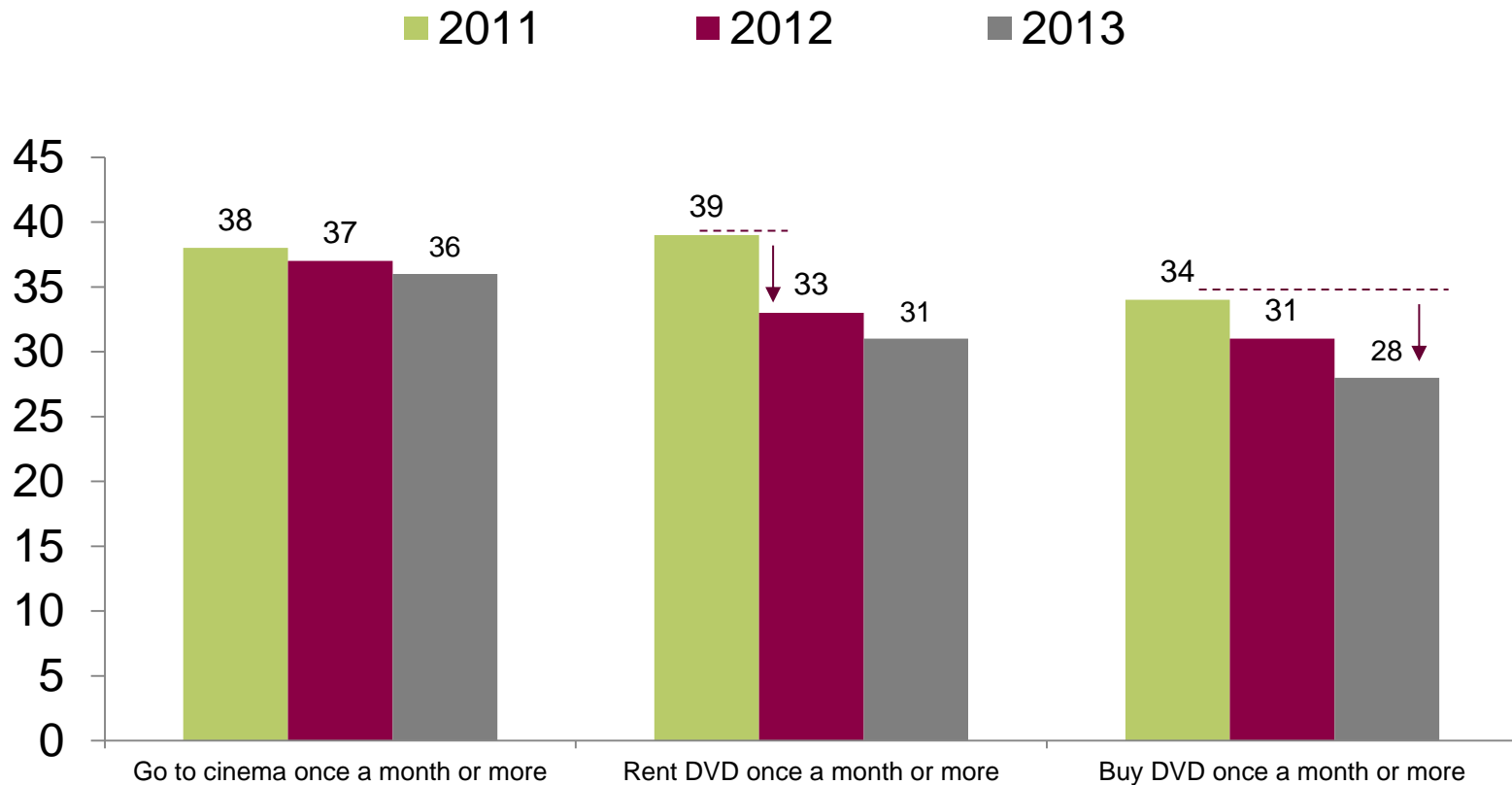


Non-illegal
downloaders
67%

For the total population, activity levels remain relatively low



The downward trend of 'traditional' viewing continues



But there are some interesting increases in some legal behaviour

LEGAL

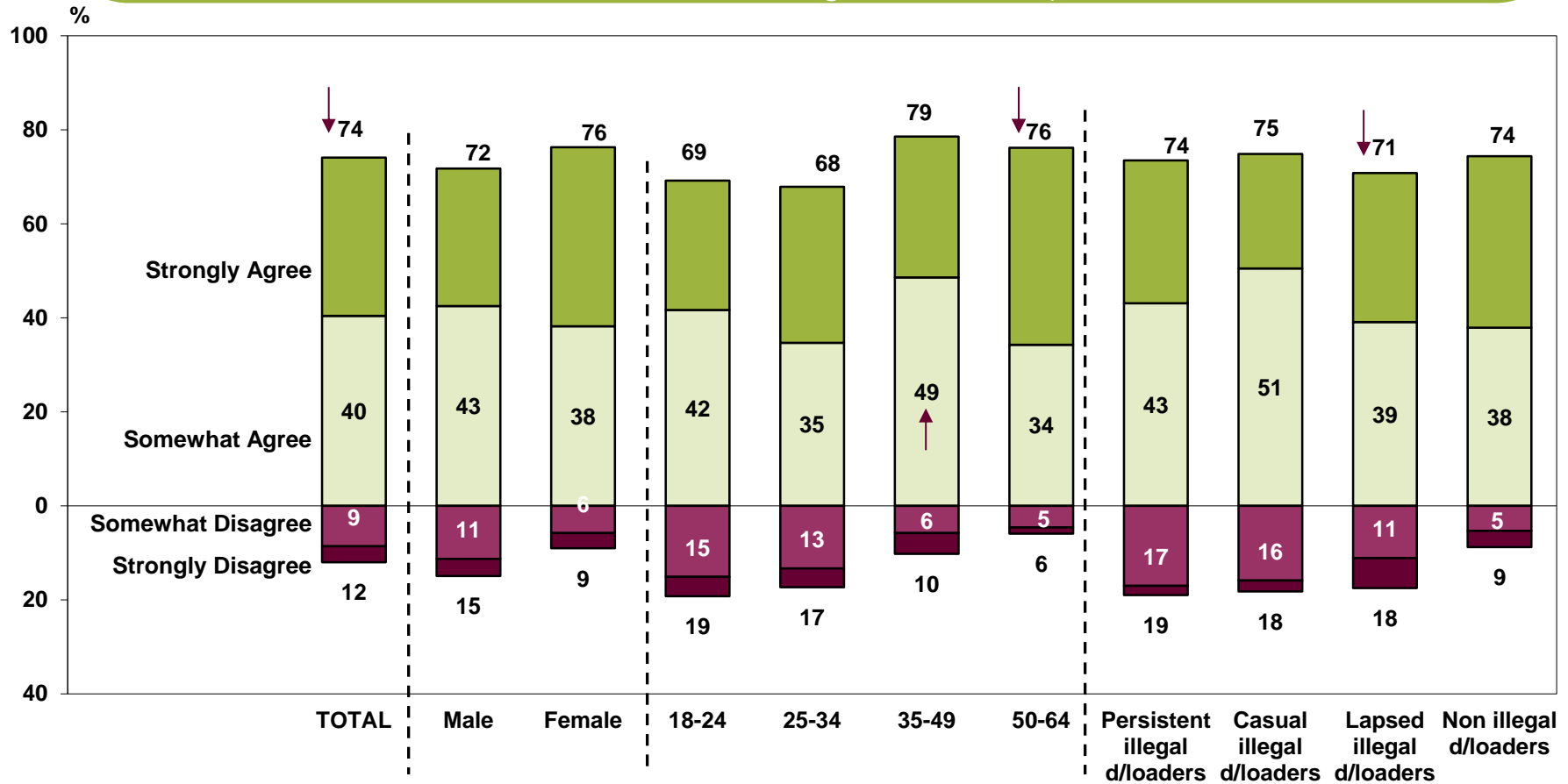
ILLEGAL

	2012		2013		Difference 2013-2012
	% At least once a week	% At least once a month	% At least once a week	% At least once a month	
Rent a movie or TV show	10	33	10	31	-2
See a movie at the cinema	6	37	7	36	-1
Buy a DVD of a movie or TV show	5	31	6	28	-3
Buy a "pay-per-view" movie on pay \ subscription TV such as Foxtel (i.e. where you pay a fee to watch a particular movie)	4	14	7	18	+4* ↑
Download or stream a movie or TV show legally (i.e. from a legitimate content site such as iTunes or Bigpond Movies)	9	25	10	23	-2*
Download a pirated movie from the internet	6	10	4	10	0
Download a pirated TV show \ series from the internet	4	11	7	11	0
Use a website to stream and watch a pirated movie on the internet	2	6	2	6	0
Use a website to stream and watch a pirated TV show \ series on the internet	4	8	4	9	+1
Buy a copy of a pirated DVD \ Blu-ray of a movie or TV show \ series on the internet	1	2	1	3	+1

BASE: TOTAL SAMPLE, 2013 (N=1229); 2012 (N=1654); ↑ Significant change at the 95% confidence level. N3 and N7 Please indicate how often, if ever, you do each of the following. - (*)Wording slightly different in 2013, as questions split into 2 questions (one for movie and one for TV show)

The majority are aware that there are more legal options available

There are an increasing number of options for people to **legally** obtain and watch TV series and movies (eg. via legal websites, iTunes, and through set top boxes, gaming consoles and digital channels)



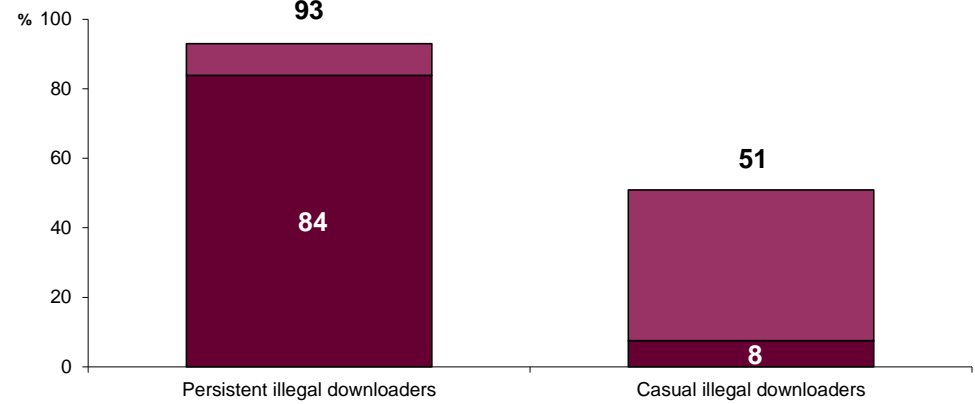
BASE: TOTAL SAMPLE 2013 N=1229; MALE N=618; FEMALE N=611; 18-24 N=264; 25-34 N=266; 35-49 N=356; 50-64 N=343; PERSISTENT ILLEGAL DOWNLOADERS N=142; CASUAL ILLEGAL DOWNLOADERS N=193; LAPSED ILLEGAL DOWNLOADERS N=99; NON ILLEGAL DOWNLOADERS N=795.

Pirates largely download or stream pirated content from home and a surprising amount of downloads occur in the workplace

At home



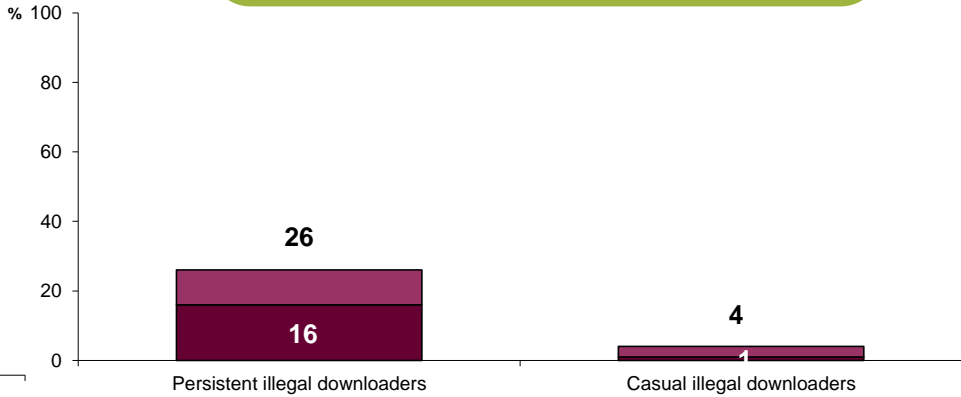
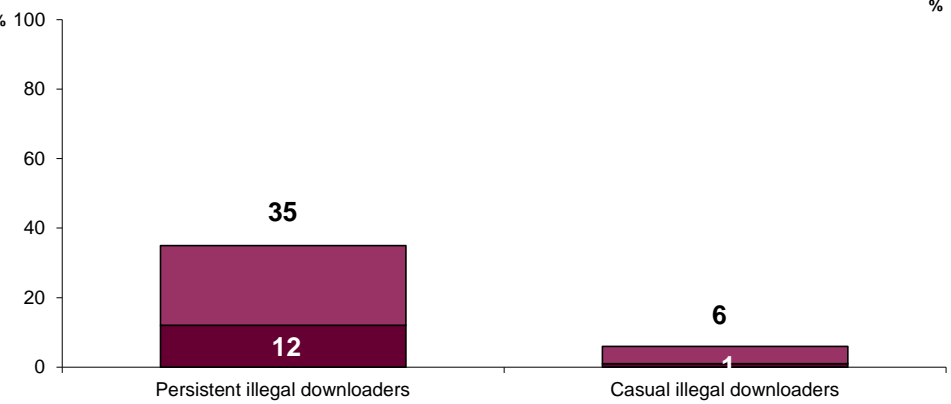
Base: Download or stream from home (N= 369)	%
• Is the account holder of the internet service at my home	58%
• not the account holder of the internet service at my home, the account holder knows that I download pirated content using this account	32%
• not the account holder of the internet service at my home, the account holder does not know that I download pirated content using this account	10%



■ At least once a week ■ At least once a month

At work

Somewhere else (cafe, airport, ...)



BASE: PERSISTENT ILLEGAL DOWNLOADERS N=142; CASUAL ILLEGAL DOWNLOADERS N=193;

In 2013, less likely to see piracy as stealing and the lack of concern for the impact on the industry continues

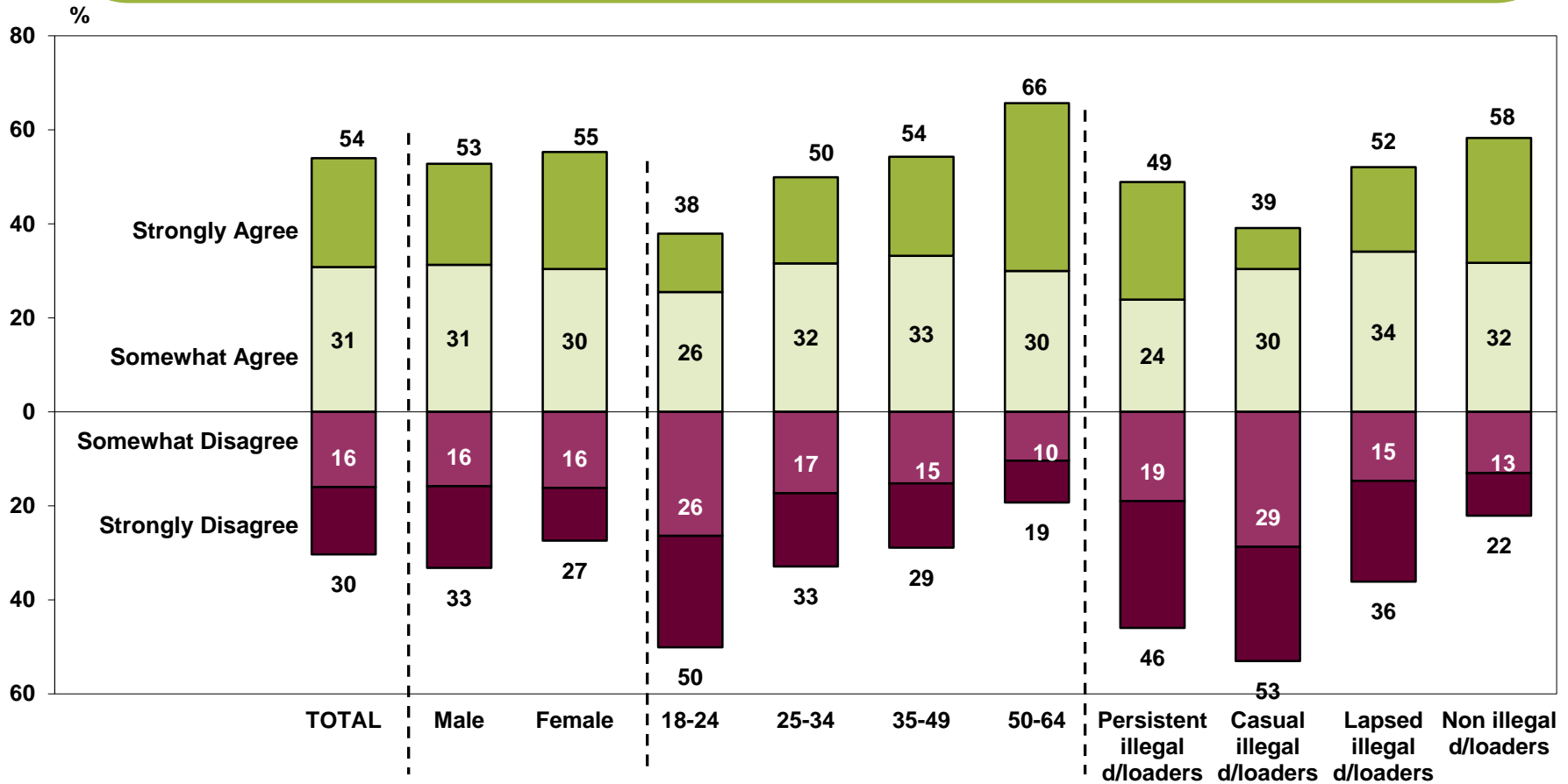
	% Strongly agree	% Somewhat agree	TOTAL AGREE %	% Gap 2013-2012
Downloading or streaming pirated content is stealing \ theft	33	34	67	↓ - 4
Pirating damages the livelihoods of those working in the film and television industry and can result in a loss of jobs	30	34	64	-1

65% for persistents, 48% for casuals

BASE: TOTAL SAMPLE, 2013 (N=1229); 2012 (N=1654); ▼ Significant change at the 95% confidence level. N5 Please indicate how much you agree or disagree with each of these statements about the pirating of movies or television shows

54% are in favour of more internet regulation to prevent piracy

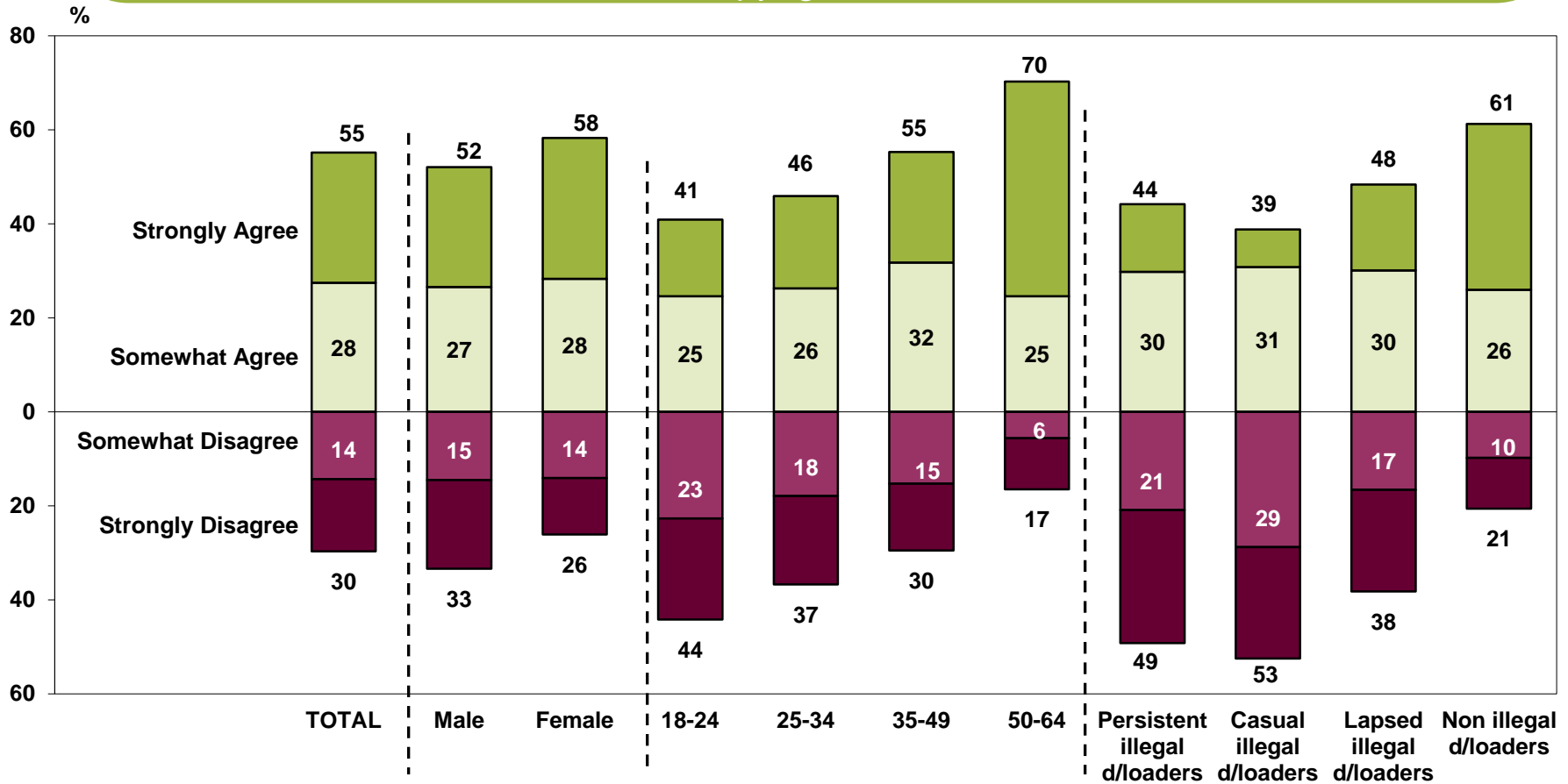
The internet requires more regulation to prevent individuals from downloading pirated content



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The majority also support blocking websites that provide access to pirate content

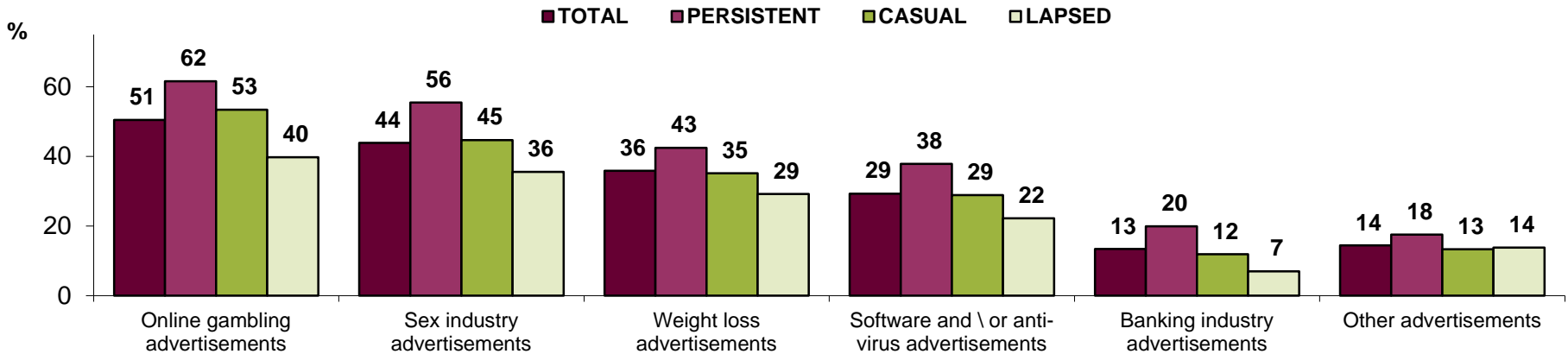
Similar to other countries (such as the UK), Australian courts should be allowed to decide to block overseas websites that solely profit from pirated movies, TV shows or other copyrighted content



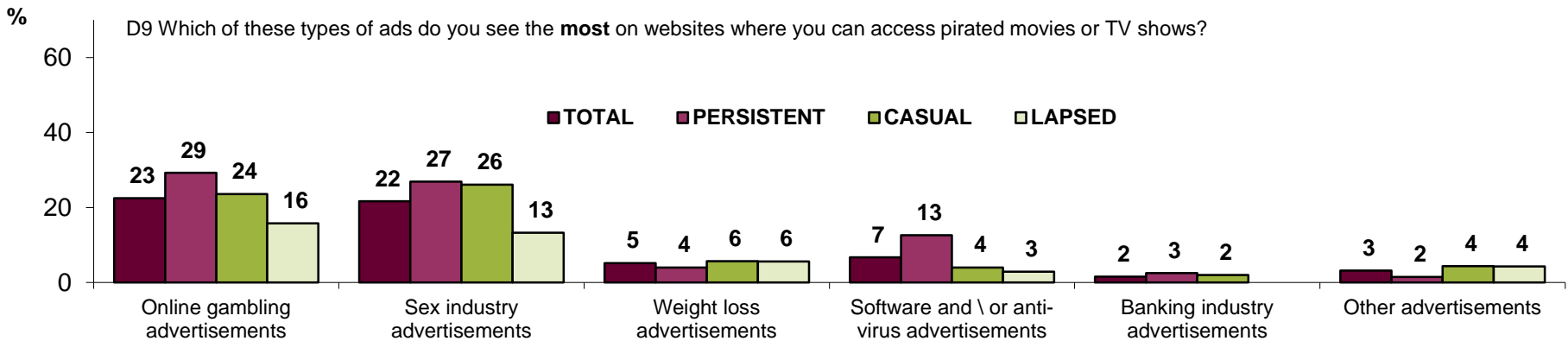
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Pirate sites provide a shop front for gambling and sex industries

D11 When viewing websites where you can access pirated movies and TV shows, what kind of ads or pop-ups do you see, even if only a little, on these types of websites?

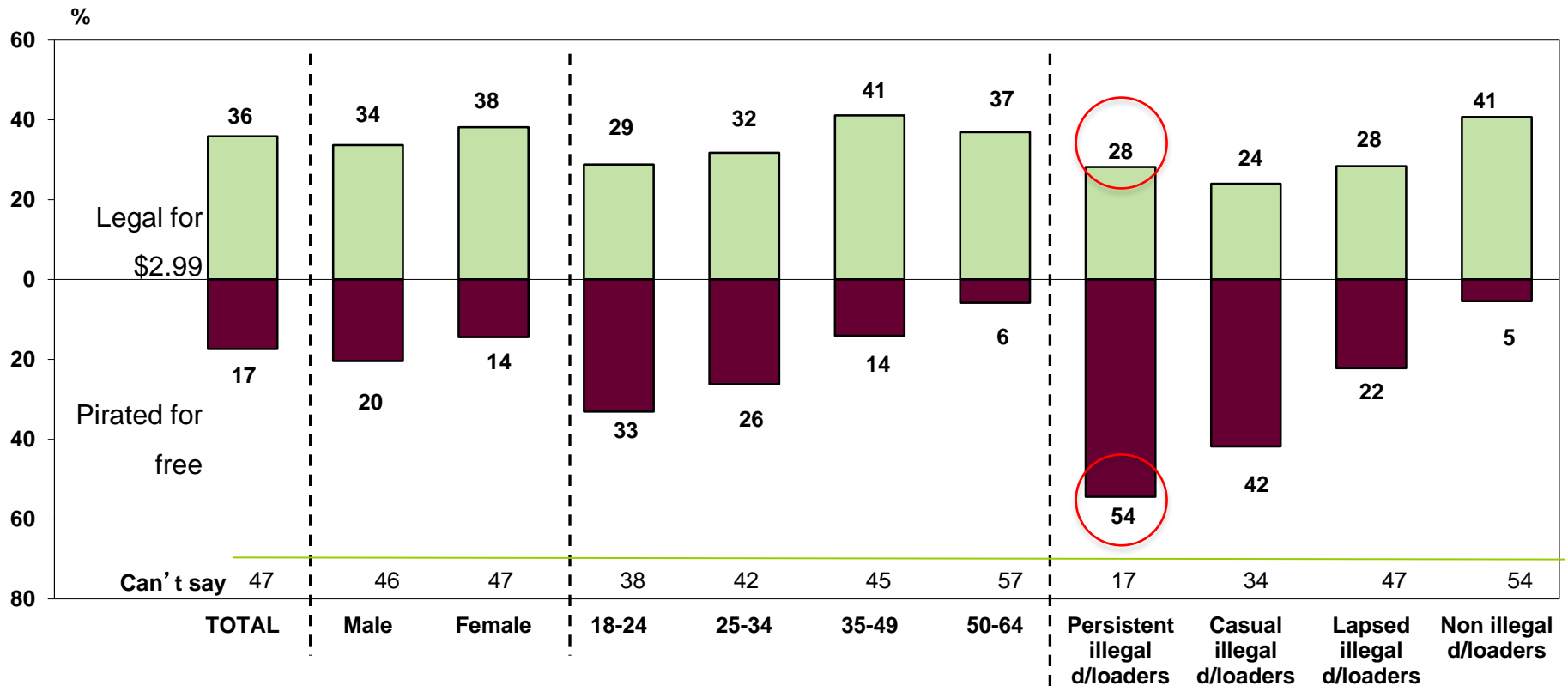


Ads from these industries the most frequently recalled



BASE: TOTAL SAMPLE PERSISTENT ILLEGAL DOWNLOADERS N=142; CASUAL ILLEGAL DOWNLOADERS N=193; LAPSED ILLEGAL DOWNLOADERS N=99

The persistent illegal downloaders remain committed to free access even when there is a legal alternative



In summary

- A fairly stable situation
 - No increase in incidence of pirates in the population
- However, some interesting changes in behaviour
 - A small decrease in frequency of some illegal activities and an increase in some legal behaviours amongst pirates
 - This suggests that as more alternative legal sources become available those who might have pirated will turn to legal options – whichever is easiest to locate and use
- Whilst generally piracy is a private affair, a surprising proportion access pirated content at work
 - Presumably against many company IT policies
- General support for greater intervention and legislation including site blocking



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