





## Messaging Poll

**General Population**  
800 adults aged 18+

- 800 online interviews from December 7 to 12, 2016 with:
  - 400 adult participants 18+ in Australia
  - 400 adult participants 18+ in New Zealand
- The margin of error is  $\pm 4.9\%$  at the 95% confidence level for each country. It is higher among subgroups.
- Due to rounding, answer choices may not always add up to 100%.
- The data shown is for *Australian* respondents only.

# **View of Film & Television Industry**

# Australians recognise local industry's economic contribution, with more than half strongly favouring laws that help local industry thrive

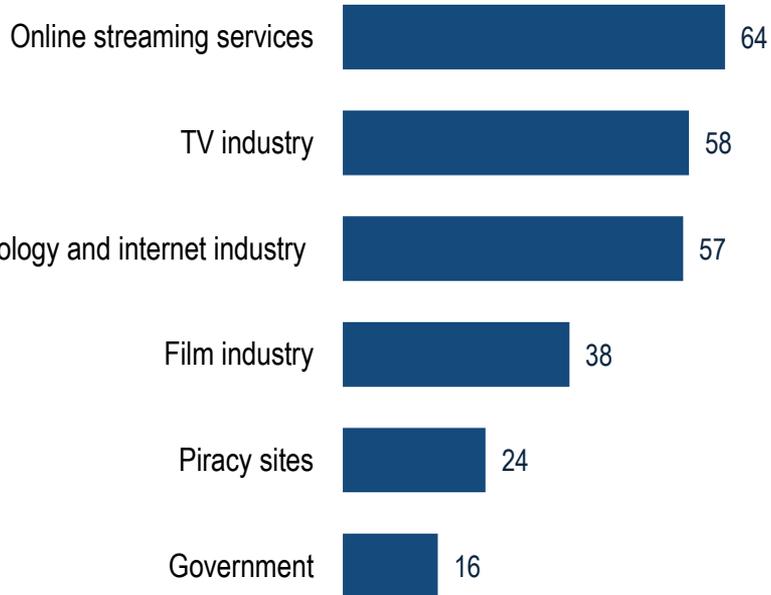
*Perceptions of local vs. global film & TV industry*

	Australia's Local Industry	Global Industry
<b>How important is the film &amp; TV industry to our economy?</b> <i>(% Very important)</i>	49%	38%
<b>How many jobs do you think the film &amp; TV industry creates?</b> <i>(Net 5-7 on 7-point scale, where 7 is "creates more jobs than any other industry")</i>	42%	39%
<b>How important is it to ensure our laws help the film &amp; TV industry thrive?</b> <i>(% Very important)</i>	56%	40%

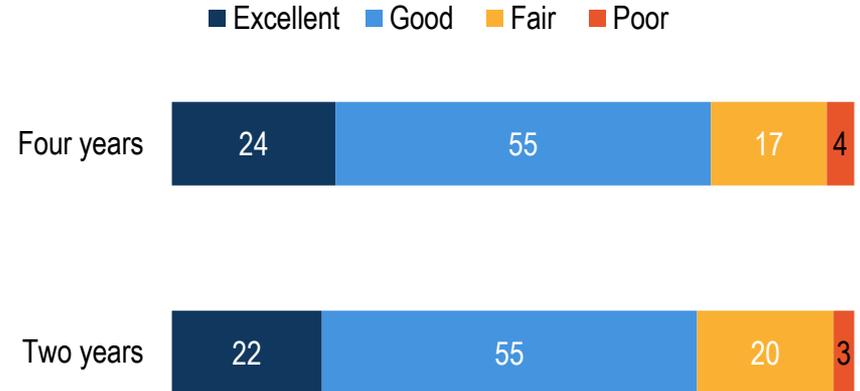
Q7,Q10: How important is Australia's local/the global film and television industry to our economy?; Q8,Q11: How many jobs do you think Australia's local/the global film and television industry creates in our country?; Q9,Q12: How important is it to ensure that our laws and other regulations help Australia's local/the global film and television industry thrive?

# Creative & tech industries are credited for increased content availability: 79% say the industry has done a good or excellent job of increasing availability

*Which has done a lot to make films and television shows more available online?*



*How has the industry done at making content available wherever and however you want to watch in the last...?*

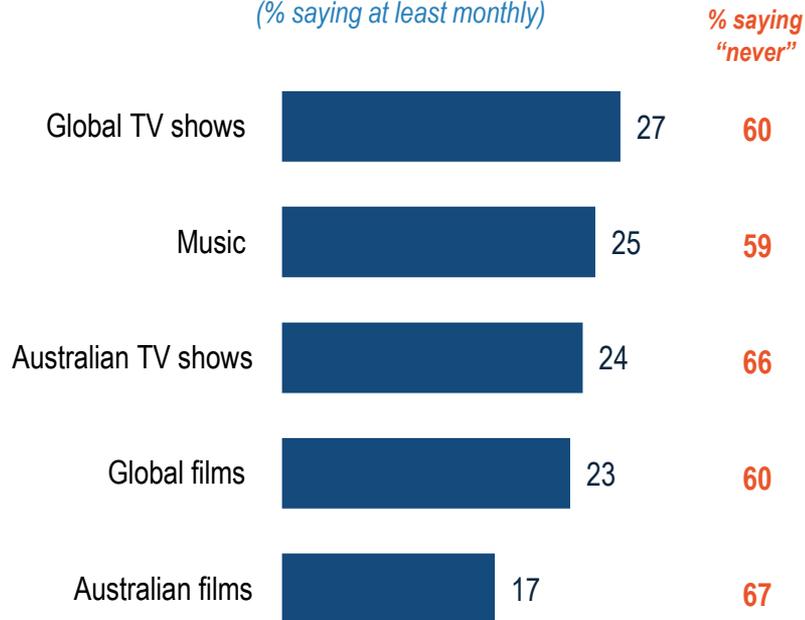


Q15: Which of the following do you think has done a lot to make films and television shows more available online?; Q13,Q14: In the last [four/two] years, how would you rate the job that the film and television industry has done at making films and television shows available wherever and however you want to watch them?

# Still, over 1-in-4 admit to illegally downloading global content and music monthly, and among those pirating, over half don't price legal alternatives

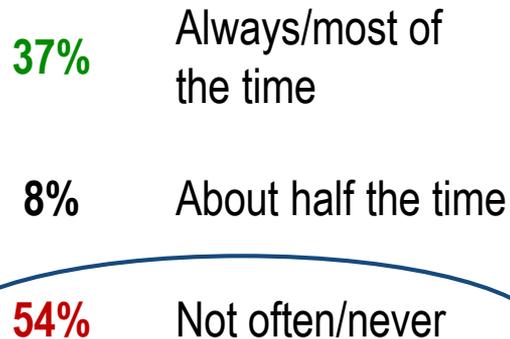
*How often have you streamed or downloaded content illegally in the past year?*

*(% saying at least monthly)*



*When you access content illegally, how often do you first check the price of accessing content legally?*

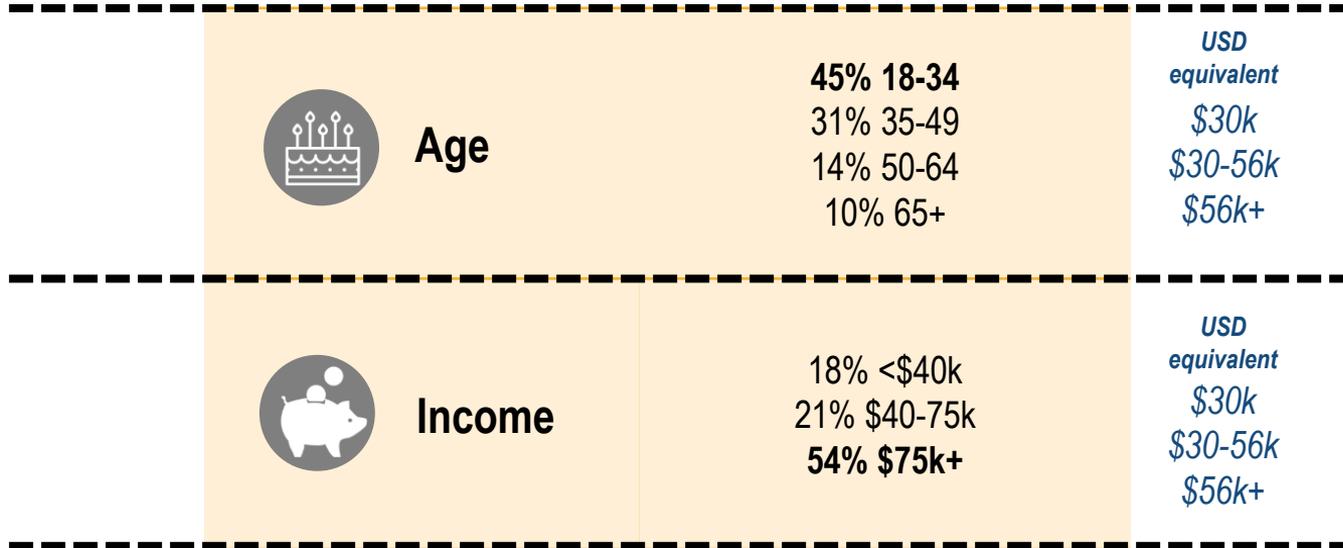
*(among those who say they have pirated)*



Q42: Thinking about the past year, how often have you streamed or downloaded the following from sites that have unauthorized creative content or content they don't have the copyrights for, without paying?; Q44: When you stream or download content you have not paid for (from unauthorized sites), how often do you first check the price of accessing this content in a legal manner?

# Unsurprisingly, younger people responsible for bulk of piracy, and pirates skew higher income

*Demographics of pirates*

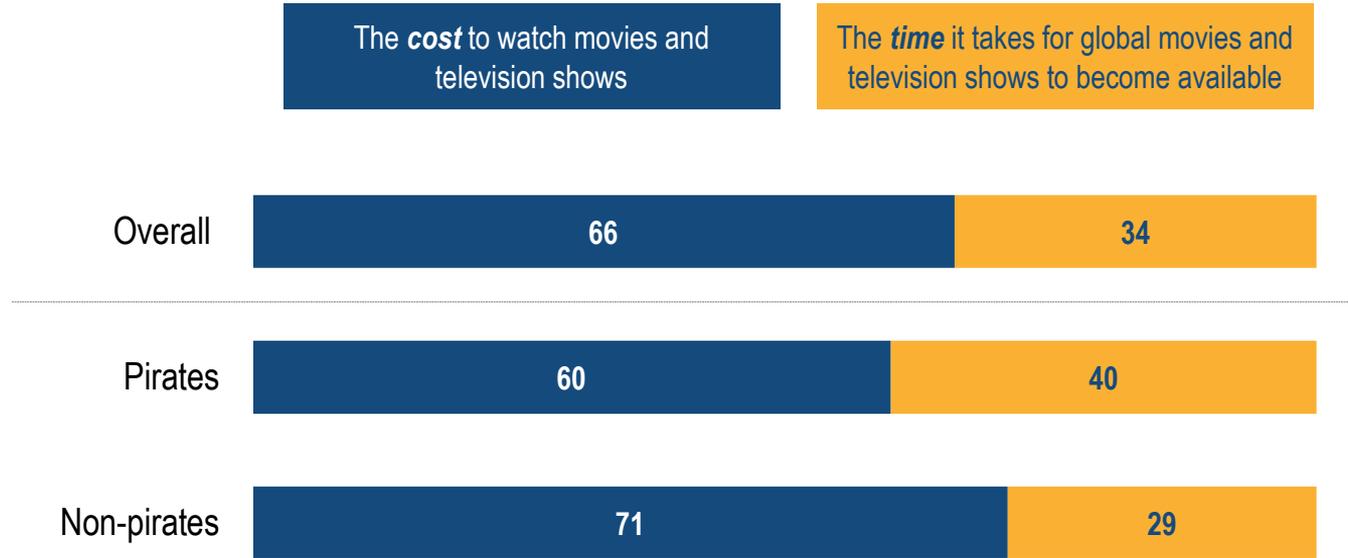


Q42: Thinking about the past year, how often have you streamed or downloaded the following from sites that have unauthorized creative content or content they don't have the copyrights for, without paying?

# **Attitudes Toward Accessibility**

# Cost is a bigger pain point for Australians than time, with pirates more likely to be dissatisfied with waiting times

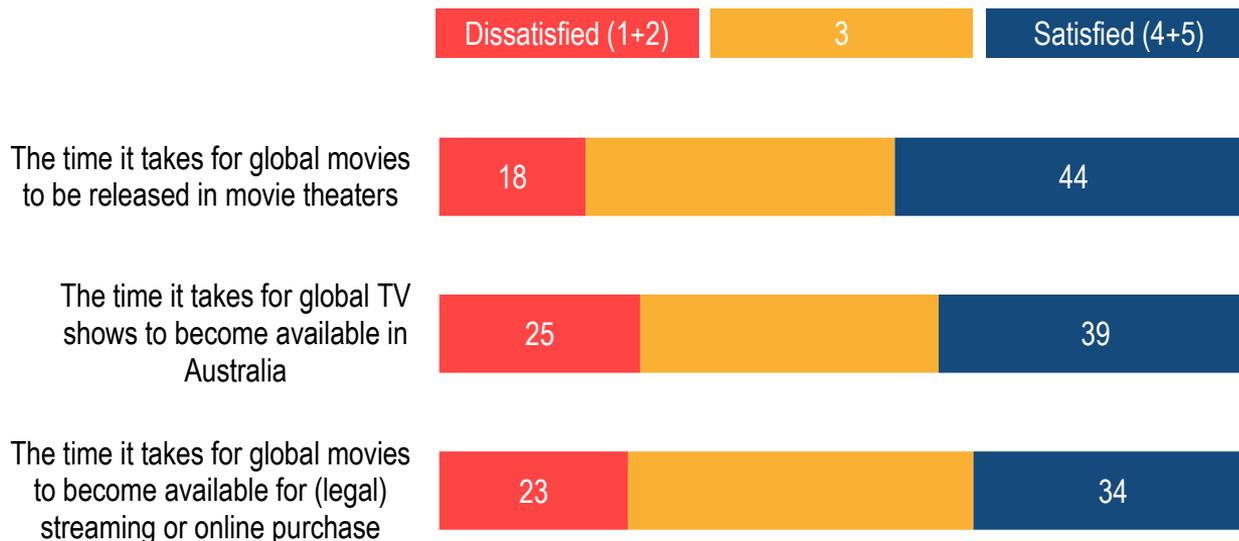
*Which of the following are you less satisfied with?*



# Consumers more concerned with delays in accessing legal content online than in cinemas, but acknowledge it is getting better...

How satisfied are you with these aspects of accessing films/TV shows? (Scale of 1 to 5)

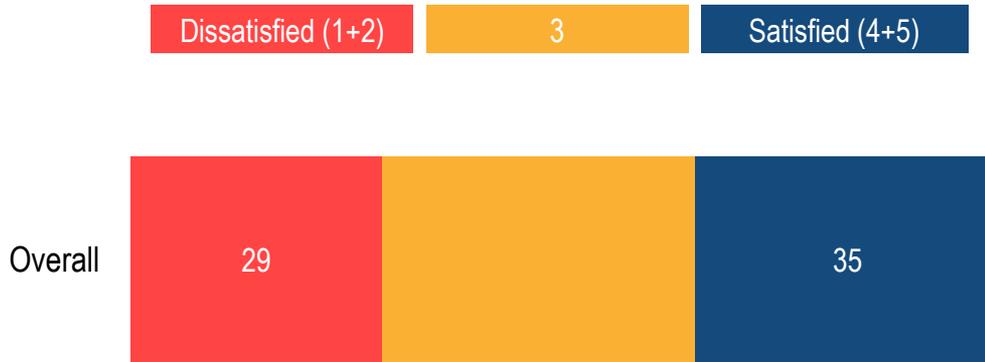
55% say amount of time it takes for global films + TV shows to become legally available has gotten better, only 9% think it's worse



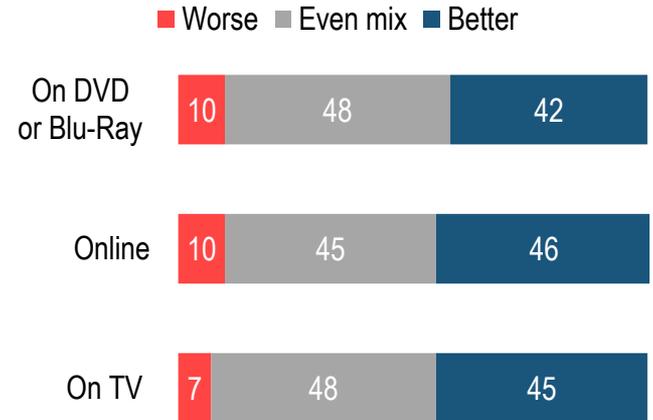
Q16: Below is a list of aspects of accessing films and television shows. For each, please indicate how satisfied you are on a 1 to 5 scale, where 1 means you are not satisfied at all and 5 means you are very satisfied.; Q18: Thinking of the last few years, do you think the amount of time it takes for global films and television shows to become legally available has gotten...

# There is greater satisfaction with the cost of watching a movie at home, and a belief that pricing has improved

*How satisfied are you with the cost to watch a movie at home from a legal source?*  
(Scale of 1 to 5)



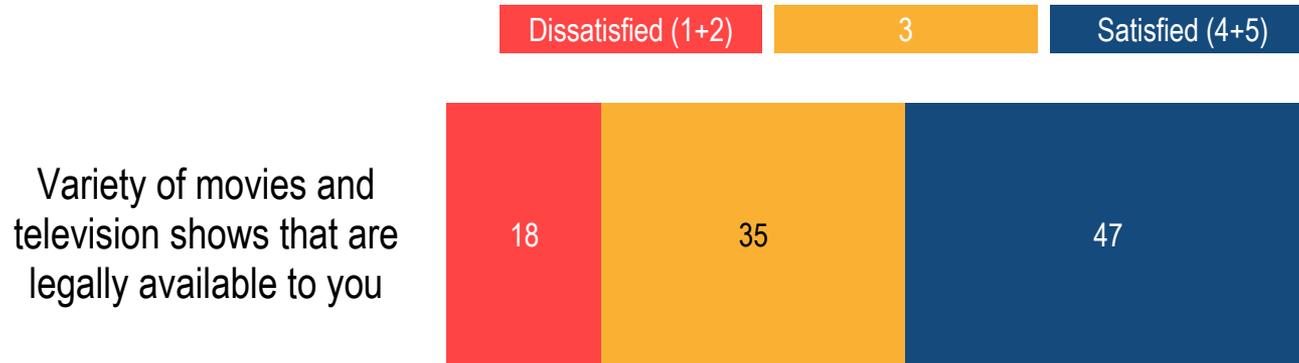
*Have prices to watch films/TV shows in this way gotten...?*



Q16: Below is a list of aspects of accessing films and television shows. For each, please indicate how satisfied you are on a 1 to 5 scale, where 1 means you are not satisfied at all and 5 means you are very satisfied.; Q17: Thinking of the last few years, how do you think the prices you pay to watch films or television shows from the following sources have changed? Have they gotten...

# Australians are generally satisfied with the variety of available movies and TV shows

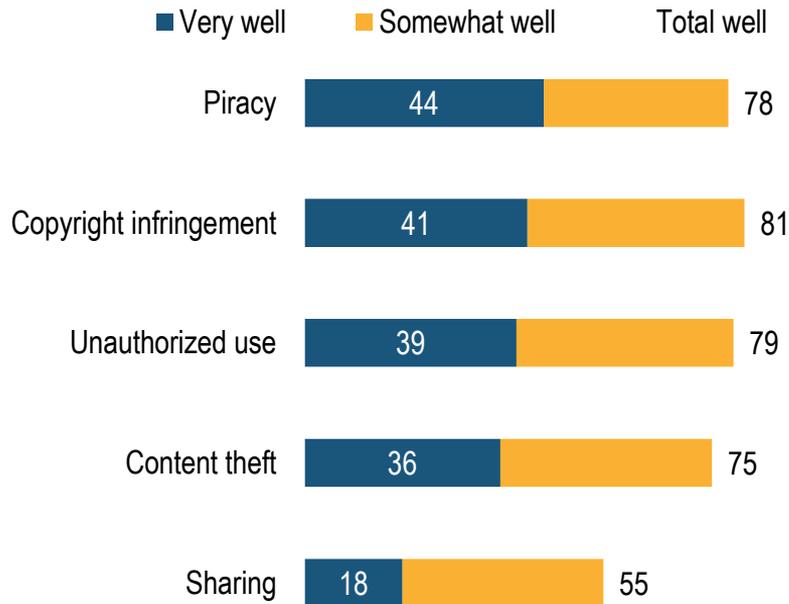
*How satisfied are you with these aspects of accessing films/TV shows? (Scale of 1 to 5)*



Q16: Below is a list of aspects of accessing films and television shows. For each, please indicate how satisfied you are on a 1 to 5 scale, where 1 means you are not satisfied at all and 5 means you are very satisfied.

# Most are comfortable with calling piracy what it is, and recognise it as “illegal”

How well do these terms describe what occurs on websites that illegally distribute creative content?



Streaming or downloading copyrighted films or television shows from unauthorised websites that don't have the rights to them is \_\_\_\_\_.  
(open end question)

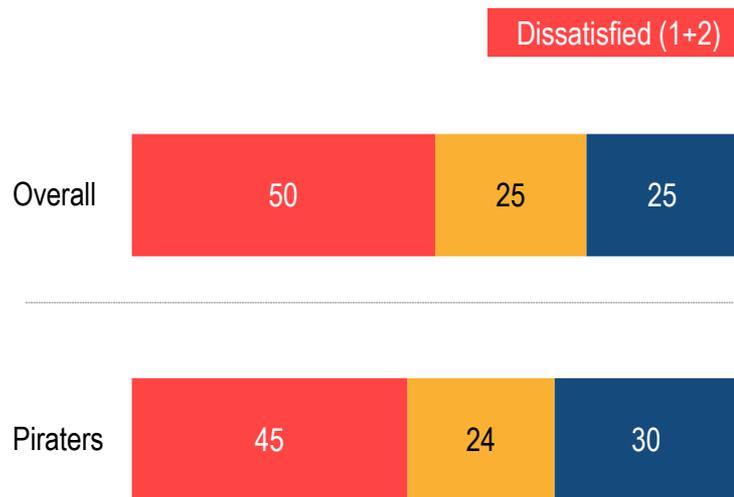
Top response was “illegal”; other responses included:



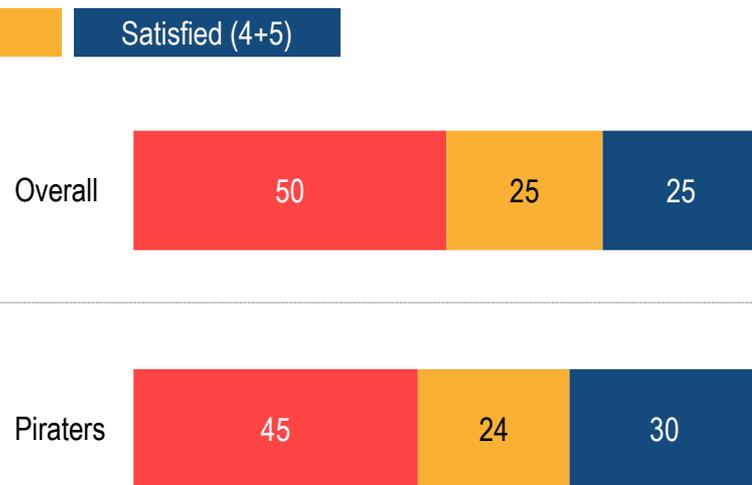
# Pirates are more satisfied with the price of cinemas and premium TV shows than general public

How satisfied are you with these aspects of accessing films/TV shows? (Scale of 1 to 5)

*The cost to watch a movie  
at a movie theater*



*The cost to watch "premium" TV  
shows not available on free channels*



Q16: Below is a list of aspects of accessing films and television shows. For each, please indicate how satisfied you are on a 1 to 5 scale, where 1 means you are not satisfied at all and 5 means you are very satisfied.