



# Intellectual Property Awareness Foundation

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*Promoting Screen Copyright*

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**Summary research statistics and feedback from  
quantitative data and qualitative focus groups**

*Commissioned by*

**The Intellectual Property Awareness Foundation**

*through*

**Sycamore Research and Marketing**

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## Key Points Summary – 2011 Research

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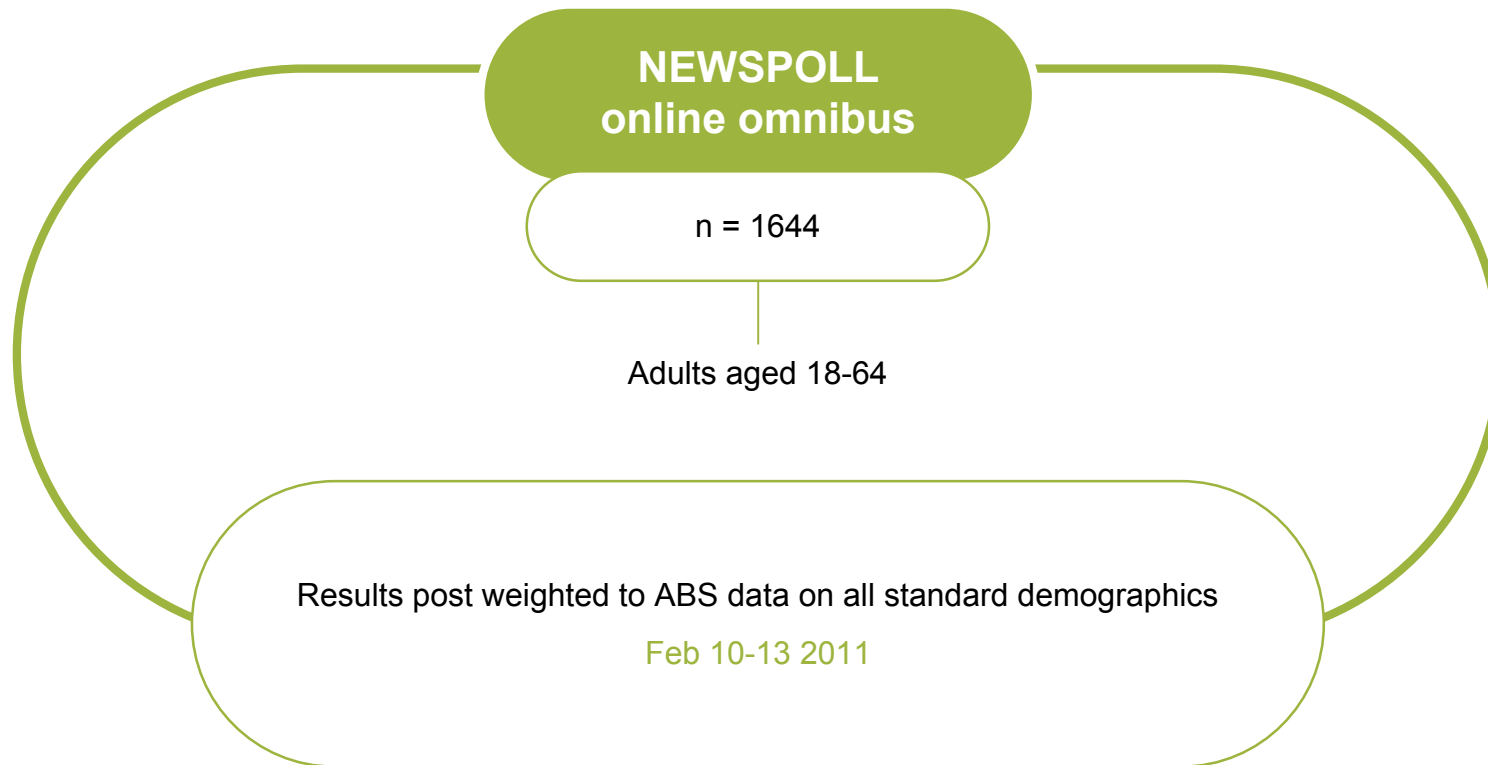
- Movie and TV theft (piracy) penetration and attitudes have remained consistent
  - Frequency is the domain of an active minority and cements acceptance
  - Piracy continues to have a negative impact on legal channels
  - Achieved a 5% reduction in the Blind Active group 2009 – 2011
  - Blind Active attitudinal segment remain target group – they blame and make excuses for their actions
  - ‘The Piracy Bus’ – 3 key themes emerged ...
    - It’s a community bus
    - I pirate – but I’m not on the bus
    - None of this would be possible without the ISPs
  - ISP intervention would be a quick and effective solution - 72% of respondents would stop accessing illegal content if their ISP sent them a notice
  - The ‘Accidental Pirate’ campaign’s ability to make people consider the issue has been successful
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# 1

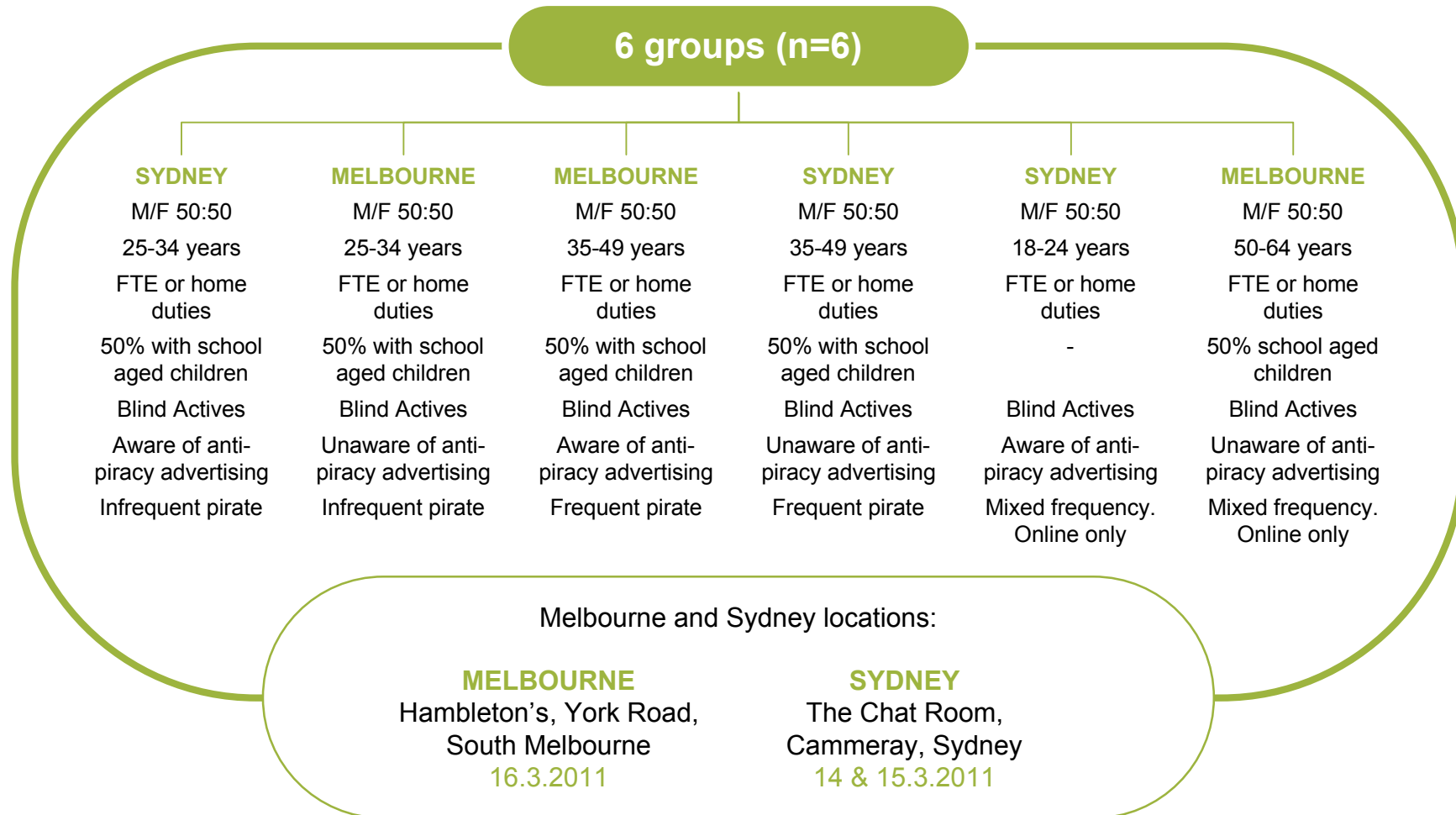
## Methodology

# Online quantitative measurement

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# Qualitative discussion groups

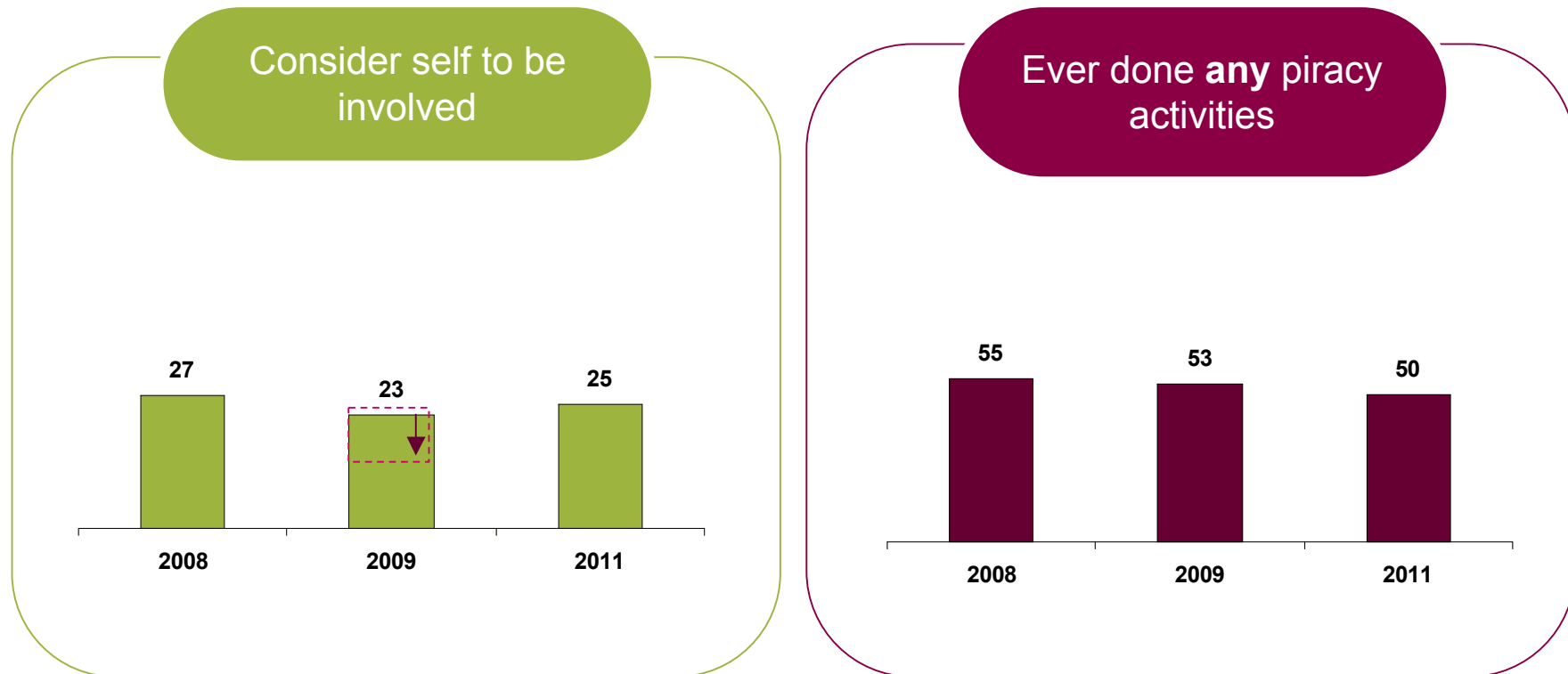


All respondents asked to keep an activity diary to record viewing habits for 4 weeks before groups

# 2

What's changed in 2011?  
Incidence & attitudes

## The situation has stabilised



*'Consider self involved' is statistically consistent with 2008 findings and directionally an improvement on 2009 levels.*

BASE: TOTAL SAMPLE, 2011 (N=1644); 2009 (N=1372); 2008 (N=1216); ▼ SIGNIFICANT AT 95% C.I.

## Activities largely remain stable

	2008 %	2009 %	2011 %	% Gap 2011-2009
Used file sharing software	20	↑ 26	↓ 22	-4
Bought a pirated DVD within Australia	16	14	13	-1
Bought a pirated DVD overseas for personal use	16	17	19	2
Bought a pirated DVD to sell	2	2	↑ 5	3
Copied a DVD that someone else bought	28	↓ 20	20	0
Allowed someone else to copy a DVD you bought/rented	32	↓ 24	24	0
Downloaded a movie/show to give/sell to someone else	n/a	8	10	2

*Whilst 2009 showed a trend towards using file sharing software, a drop in 2011 figures may be influenced by those turning to illegal streaming or to legal online sites*

## As do attitudes...with some encouraging signs

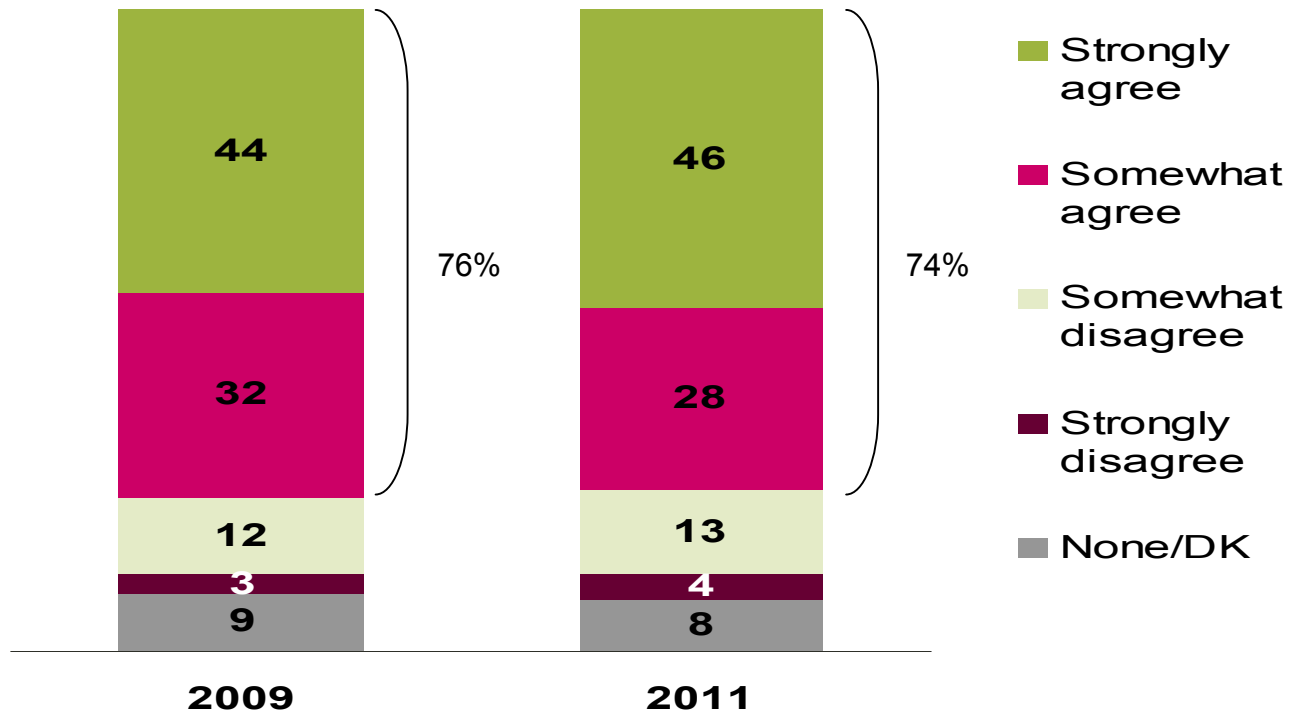
	2008 %	2009 %	2011 %	% Gap 2011-2009
It's no big deal	n/a	n/a	25*	
It's not something I give a lot of thought to	n/a	n/a	62*	
It's something that everybody does nowadays*	n/a	n/a	64*	
It is stealing / theft	72	72	72	0
It's a cheapskate/stingy thing to do	57	60	61	1
The people who sell are the problem	46	44	41	-3
It's ok, companies make a lot of money	27	24	24	0
It damages Australia's film/TV industry	70	71	71	0
It damages the overseas film/TV industry	66	68	68	0
Pirating damages livelihoods of those working in film/TV industry	n/a	64	63	-1

BASE: TOTAL SAMPLE, 2011 (N=1644); 2009 (N=1372); 2008 (N=1216); SIGNIFICANT AT 95% OR ABOVE

\* STATEMENT CHANGED FROM PREVIOUS WAVES WHICH HAD A MAJOR IMPACT ON THE % OF RESPONDENTS AGREEING WITH THE STATEMENT.

*Disconnection between activity and attitude seen in 2009 is starting to change – everyone does it but that doesn't mean it's not a big deal, it's also (directionally) not just the seller who is the culprit*

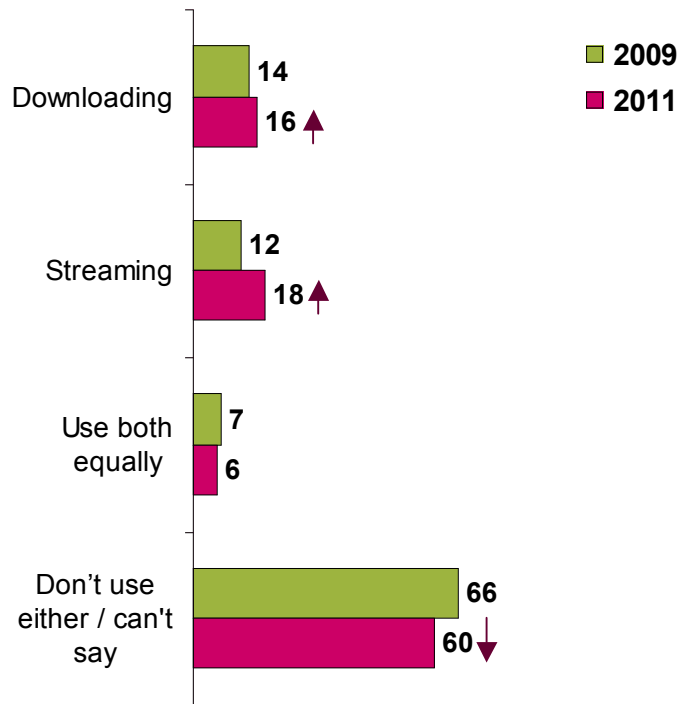
I don't think I contribute to the problem of movie and TV piracy



*A smaller number who 'consider themselves involved in piracy' agree with the statement 'I don't contribute'. The same is true for those who use file sharing software to pirate. People appear to be taking more responsibility for their actions and recognise that file sharing is piracy.*

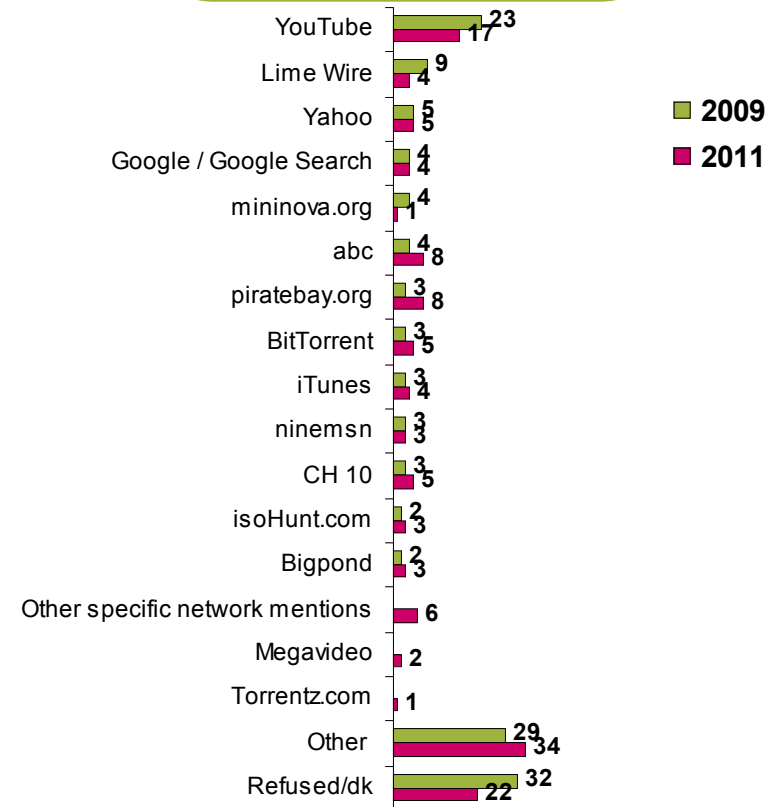
# The mix of sources endures

## ONLINE ACTIVITY %



BASE: TOTAL SAMPLE, 2011 (N=1644), 2009 (N=1372)  
SIGNIFICANT AT 95% OR ABOVE

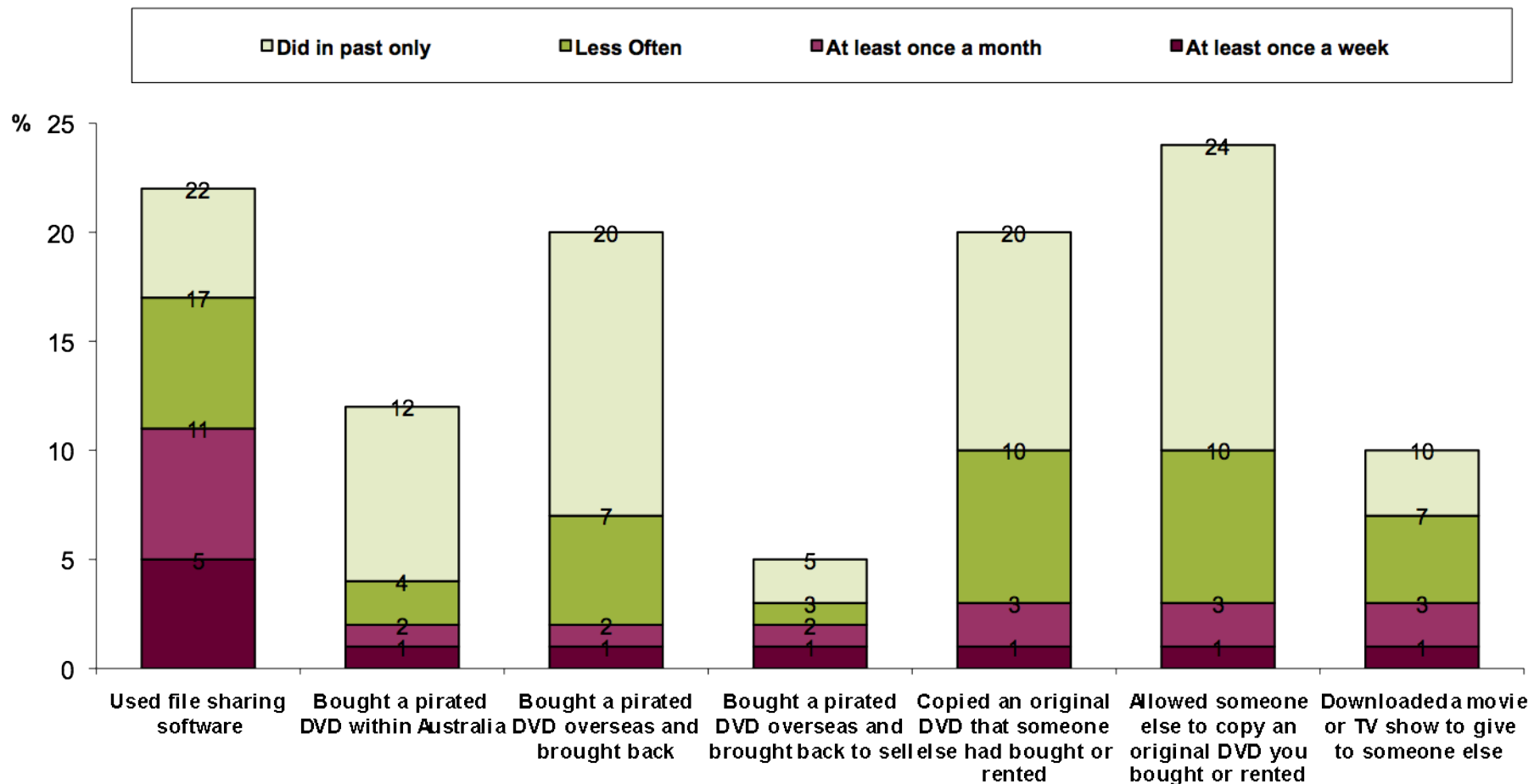
## SITES VISITED %



BASE: THOSE WHO DOWNLOAD AND/OR STREAM 2011 (N=761), 2009 (N=613)

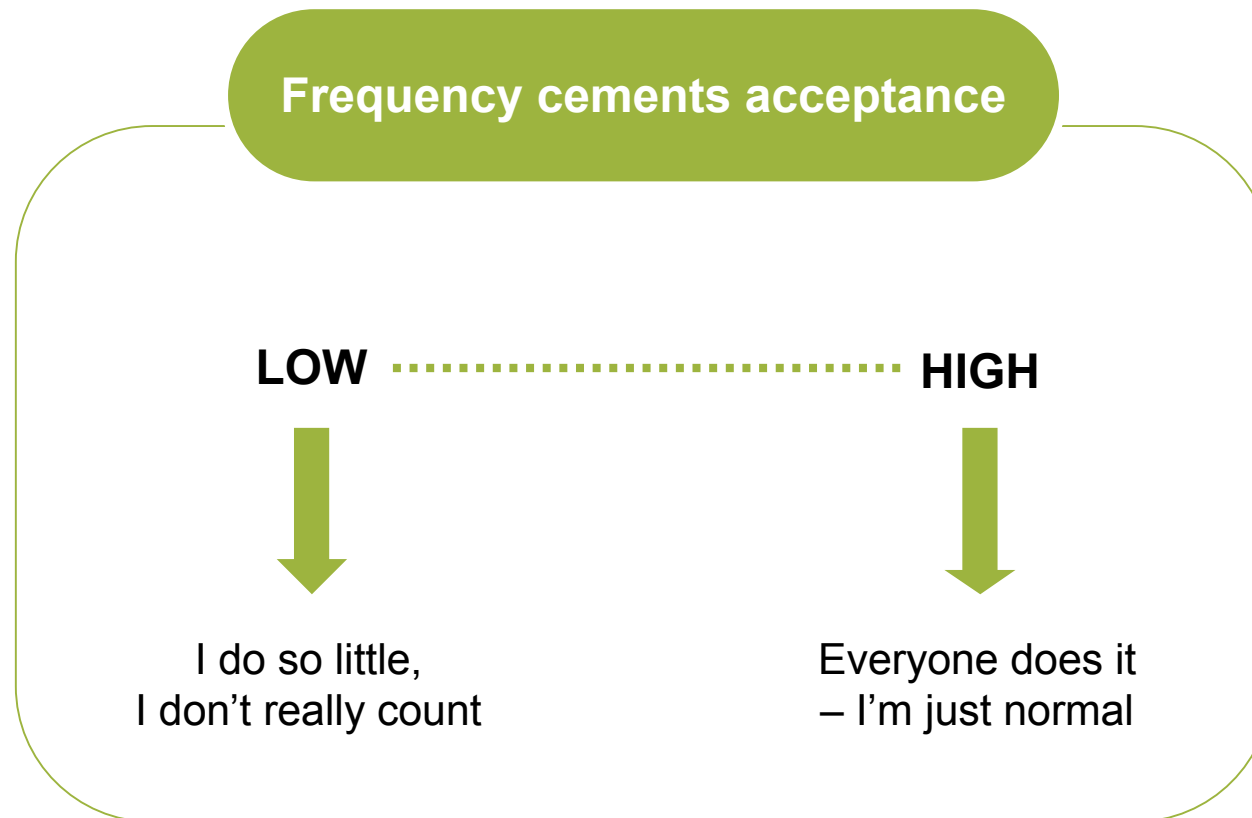
# The new news ...

## frequent piracy is the domain of an active minority



# The role of frequency

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# Piracy continues to have an impact on the legal channels

Which of the following have you ever done?

	2008 %	2009 %	2011 %	% Gap 2011-2009
Bought an original DVD after watching a pirated version on the internet/DVD	26	22	↑ 25	3
Watched a movie at the cinema after watching a pirated version on the internet/DVD	16	14	13	-1
Bought a pay-per view movie on pay/subscription TV after watching a pirated version on the internet/DVD	n/a	6	↑ 10	4
Paid to download or stream a movie/TV show via an online provider after watching a pirated version on the internet/DVD	n/a	n/a	10	n/a

BASE: TOTAL SAMPLE, 2011 (N=1644); 2009 (N=1372); 2008 (N=1216); SIGNIFICANT AT 95% OR ABOVE

# 3

## Attitudes & Behaviours

# 4 distinct attitudinal groups – 2009 Survey

*Key communication target segment for 2010  
Accidental Pirate campaign*

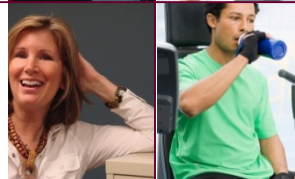
***Proud Actives***  
**23%**

*(Consider self to be pirate and  
do 1+ pirating activities)*



***Blind Actives***  
**34%**

*(Do not consider self to be pirate  
but do 1+ pirating activities)*



***Proud Passives***  
**38%**

*(Don't do any activities and consider it to  
be wrong and not sure how to do it)*

***Blind Passives***  
**5%**

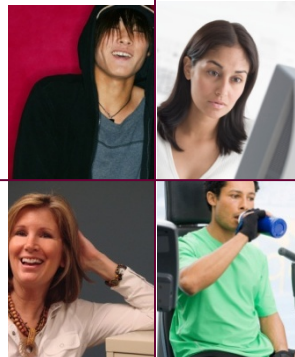
*(Don't do any activities and doesn't  
consider it to be wrong and not sure how  
to do it)*

# Attitudinal groups in 2011

*Key communication target segment for 2010  
Accidental Pirate campaign*

***Proud Actives***  
**24% (+1%)**

*(Consider self to be pirate and  
do 1+ pirating activities)*



***Blind Actives***  
**29% (-5%)**

*(Do not consider self to be pirate  
but do 1+ pirating activities)*

***Proud Passives***  
**40% (+2%)**

*(Don't do any activities and consider it to  
be wrong and not sure how to do it)*

***Blind Passives***  
**7% (+2%)**

*(Don't do any activities and doesn't  
consider it to be wrong and not sure how  
to do it)*

# 4 Through the eyes of the blind

## The Blind Actives

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- A group that is increasingly able to give textbook definitions of piracy
  - “Taking ownership of something that’s not yours”
  - “Illegal use of intellectual property”
- Largely well informed but figures suggest some remaining confusion over legality of pirating for personal use and sharing of pirated materials
  - Potentially just a convenient truth BUT some of the ‘grey’ remains
  - However, the grey is not of lack of knowledge or logic, for them it is lack of persuasiveness that it is not right
  - Ie. How can sharing and personal use be piracy – even if you call it theft
  - The same issues resurface
    - It’s there, it’s free, it’s socially acceptable, you don’t get caught and if you did then little would happen to you.


## A group in denial

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- Whilst open in discussion as to their behaviour, many Blind Actives perceive themselves to be almost victims or unwilling participants
- They have a strong conviction ...
  - they are not really responsible for their actions,
  - they reassure themselves there must be others out there doing it more than themAll this reinforces their view that they don't contribute!
- They are not a weird minority group but cut across all demographics – they are like any one of us



**“I’m hopping on the bandwagon but I’m not contributing to the bandwagon in any way”**



**“We're all doing illegal stuff but we're just doing it for ourselves”**

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*A hard group to persuade.*

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## So who do they blame?

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### The movie industry

- Still seen by some as a form of marketing;  
“They like piracy because it gets a movie seen”
- Make obscene sums of money from us – we deserve to take some back

“the movie exec [is against piracy] because he's concerned he won't be able to buy his tropical island until next week!”

### The law enforcers

- Customs waving through multiple DVD copies
- Police as pirates

“Multi million dollar companies won't go after little old me”

## So who do they blame?

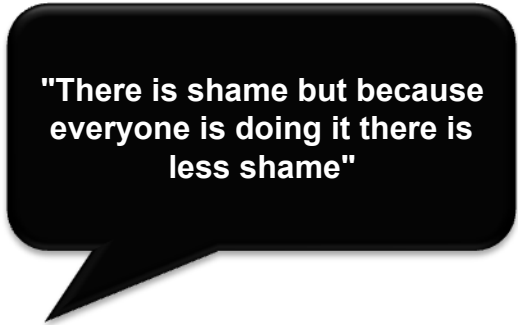
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### The law

- Those who understand copyright laws see them as archaic
- The terminology needs updating

### Society

- Acceptance of the issue
- Many feel it is in fact embraced as the way to behave



**"There is shame but because everyone is doing it there is less shame"**

## So who do they blame?

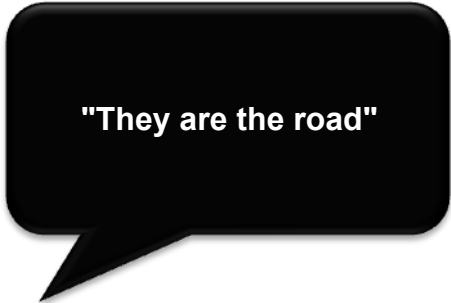
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### The ISPs

- The channel that makes downloading possible
- Seen to be apathetic towards the issue

Supported by ...

- The file-sharing sites
- The technology companies who market and sell mass storage devices for movies



"They are the road"

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*In short - plenty of others who can shoulder responsibility so they don't have to*

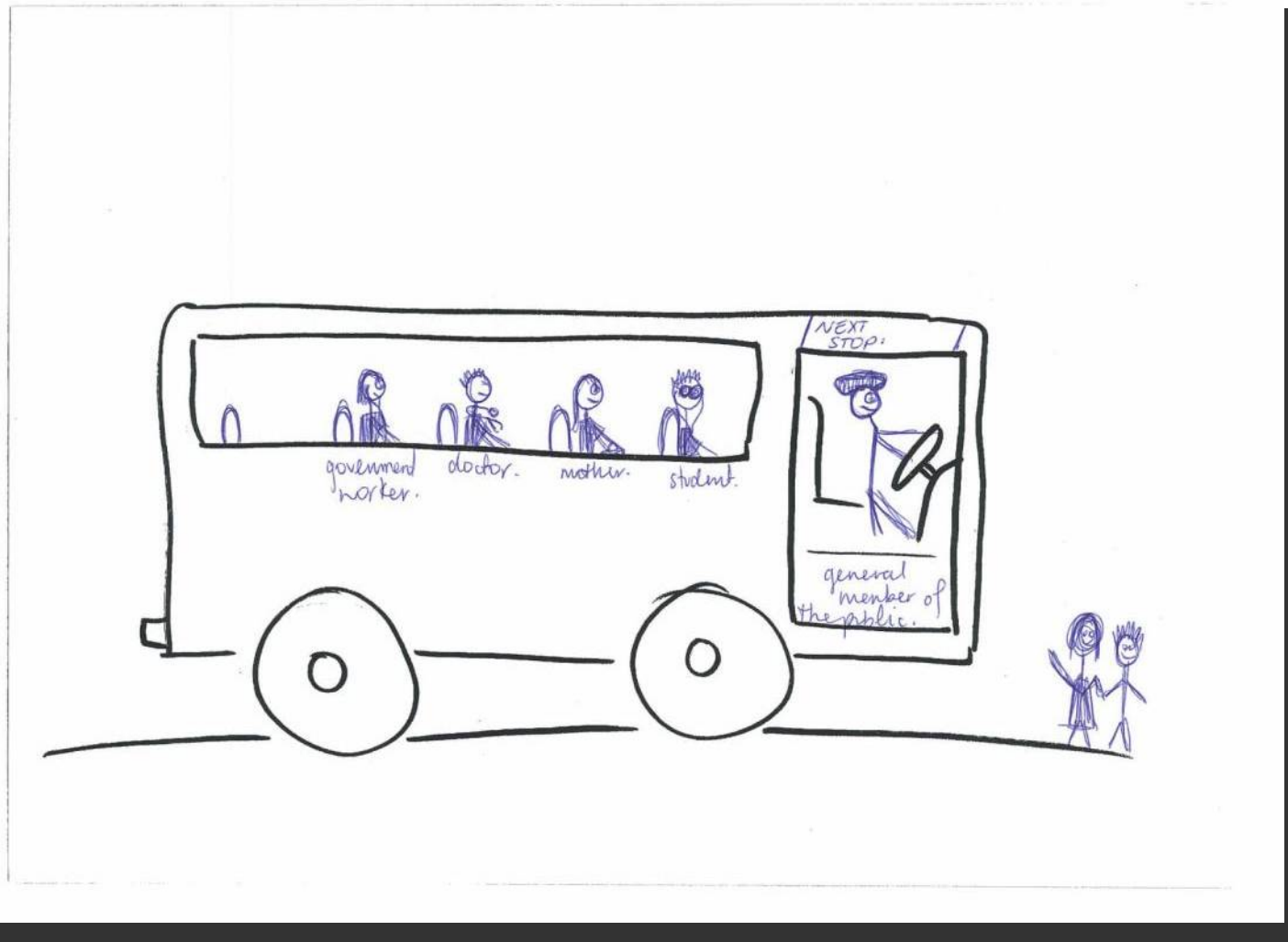
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# Qualitative Groups

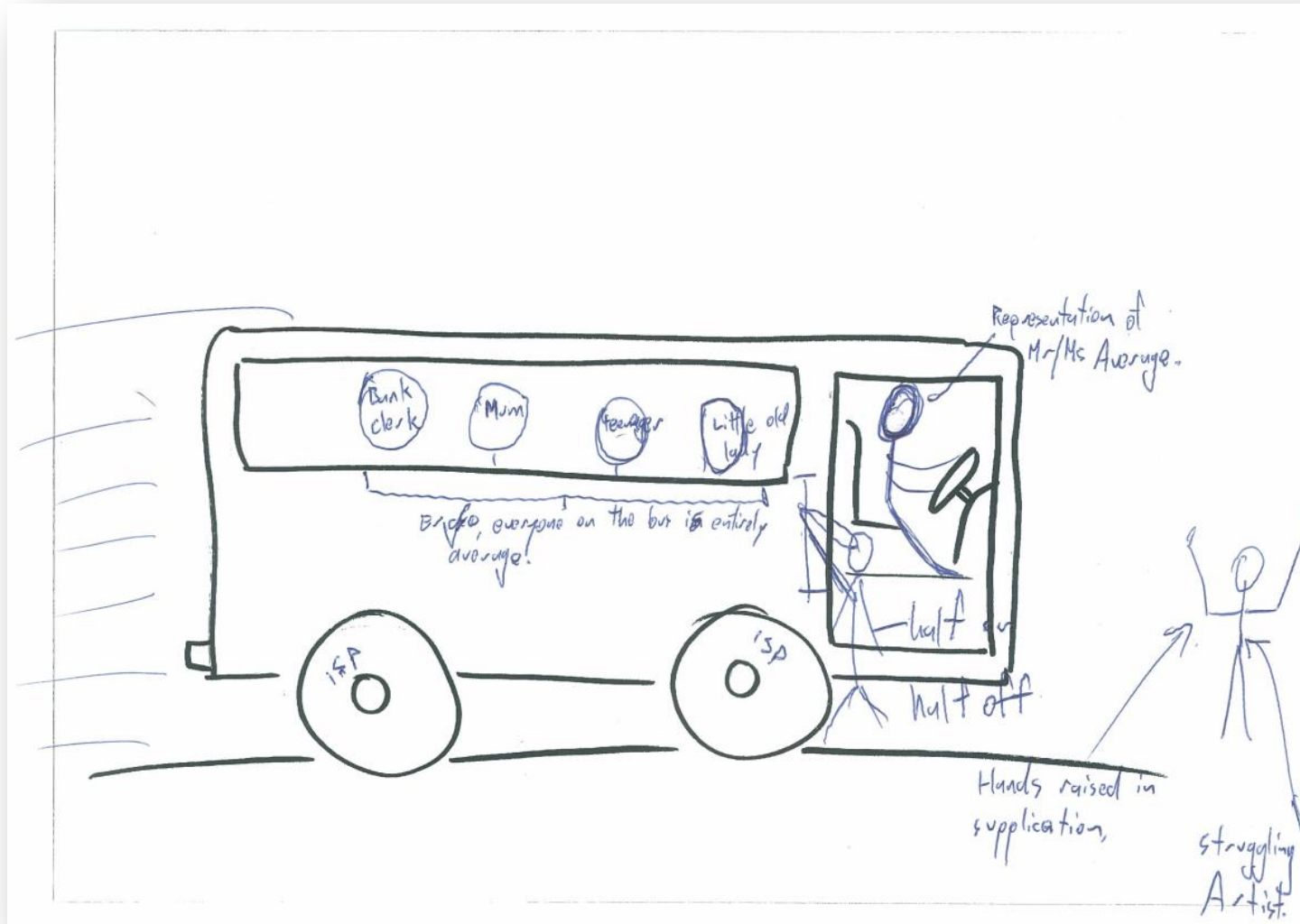
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- A new projective technique was added this year, designed to provide deeper insight into the public's view on piracy in Australia.
- Task was the first in the focus group... before discussion or conversation on the issue.
- Participants asked - What would a 'piracy bus' look like?
  - Who is driving it? Who's on board? Who's not? Where are you sitting? What are the signs along the way?
- **3 key themes emerged** (slides following are a representative sample of actual drawings)
  - It's a community bus
  - I pirate – but I'm not really on the bus
  - None of this would be possible without the ISPs

# Respondent 'A'



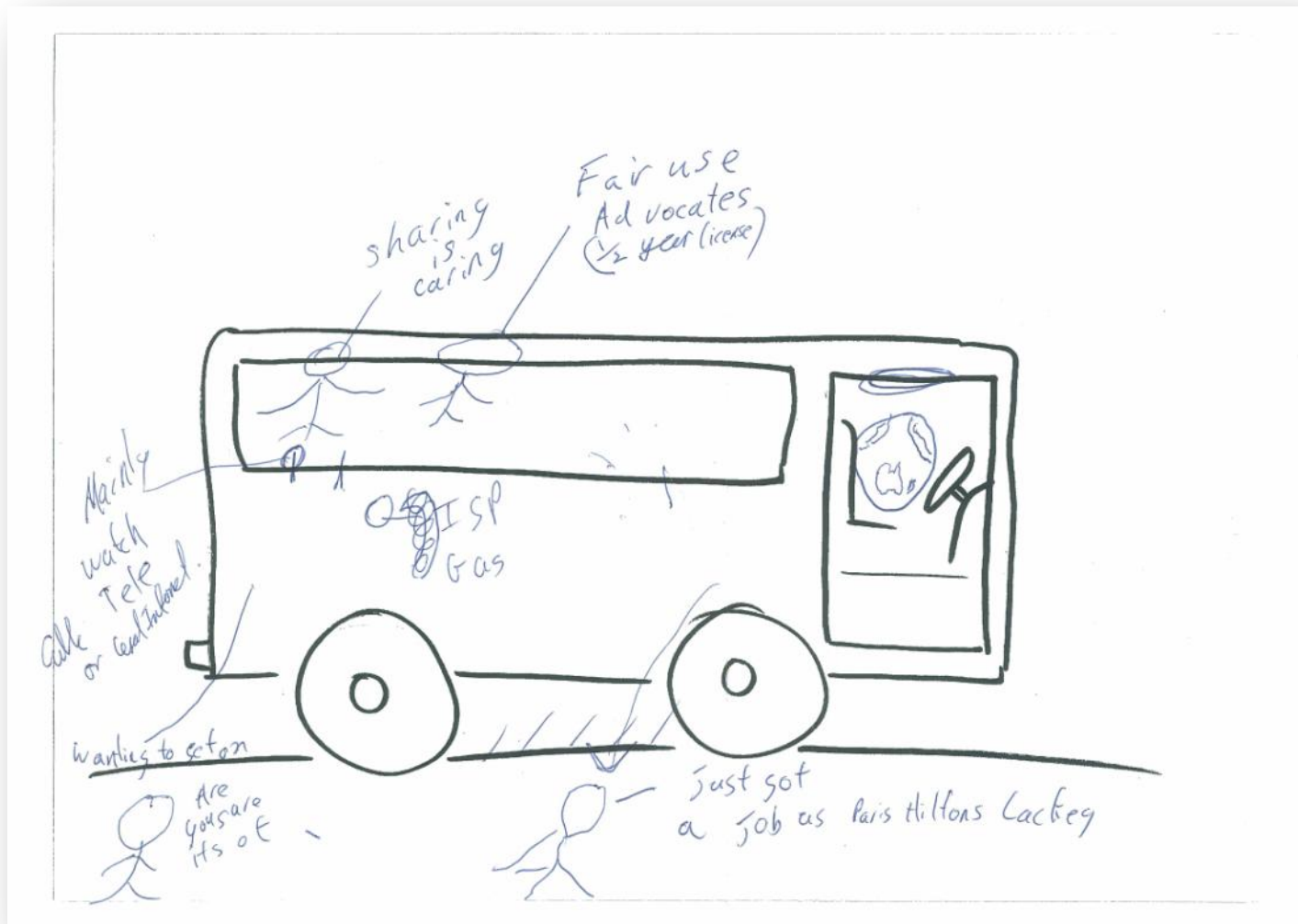
# Respondent 'B'



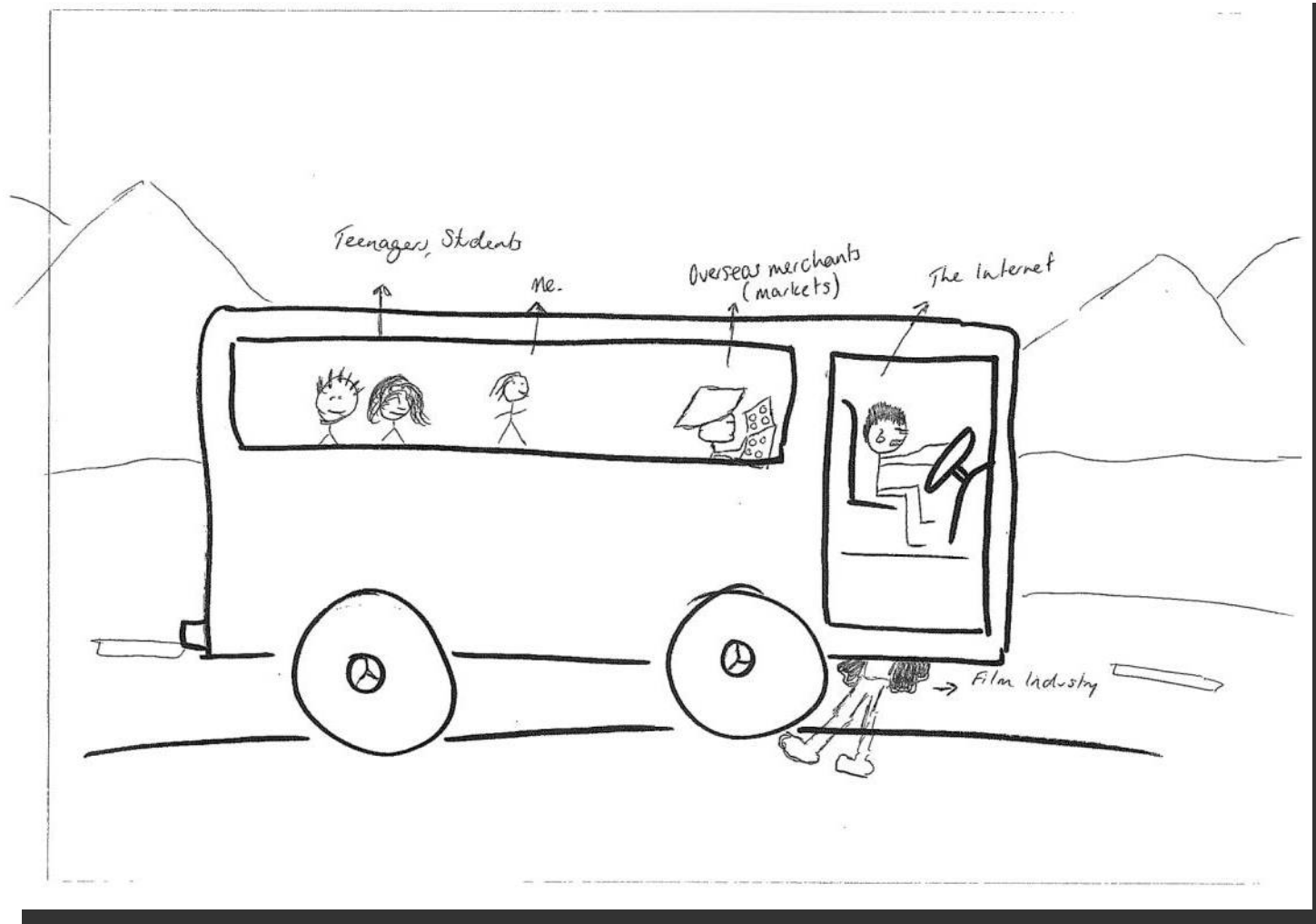
# Respondent 'C'



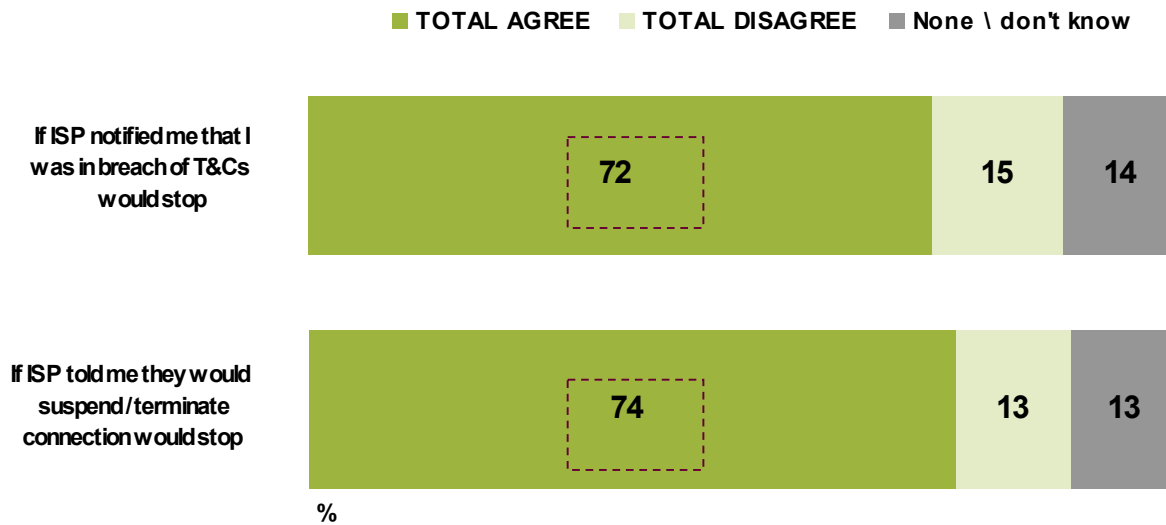
# Respondent 'D'



# Respondent 'E'



# ISP educational notices would have a positive effect



BASE: TOTAL SAMPLE, 2011(N=1644)

*Focus groups reveal ISPs seen to facilitate piracy but appear to show no responsibility*

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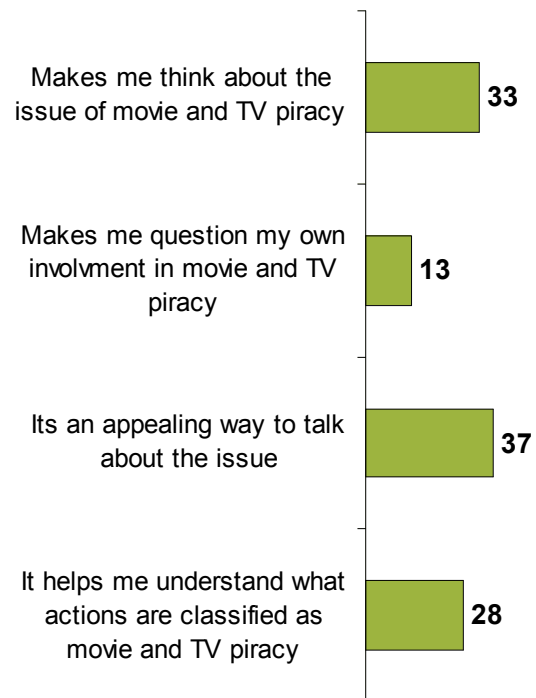
# Current IPAF Communications

AccidentalPirate.com.au



# Advertising Impact

## ADVERTISING IMPACT %



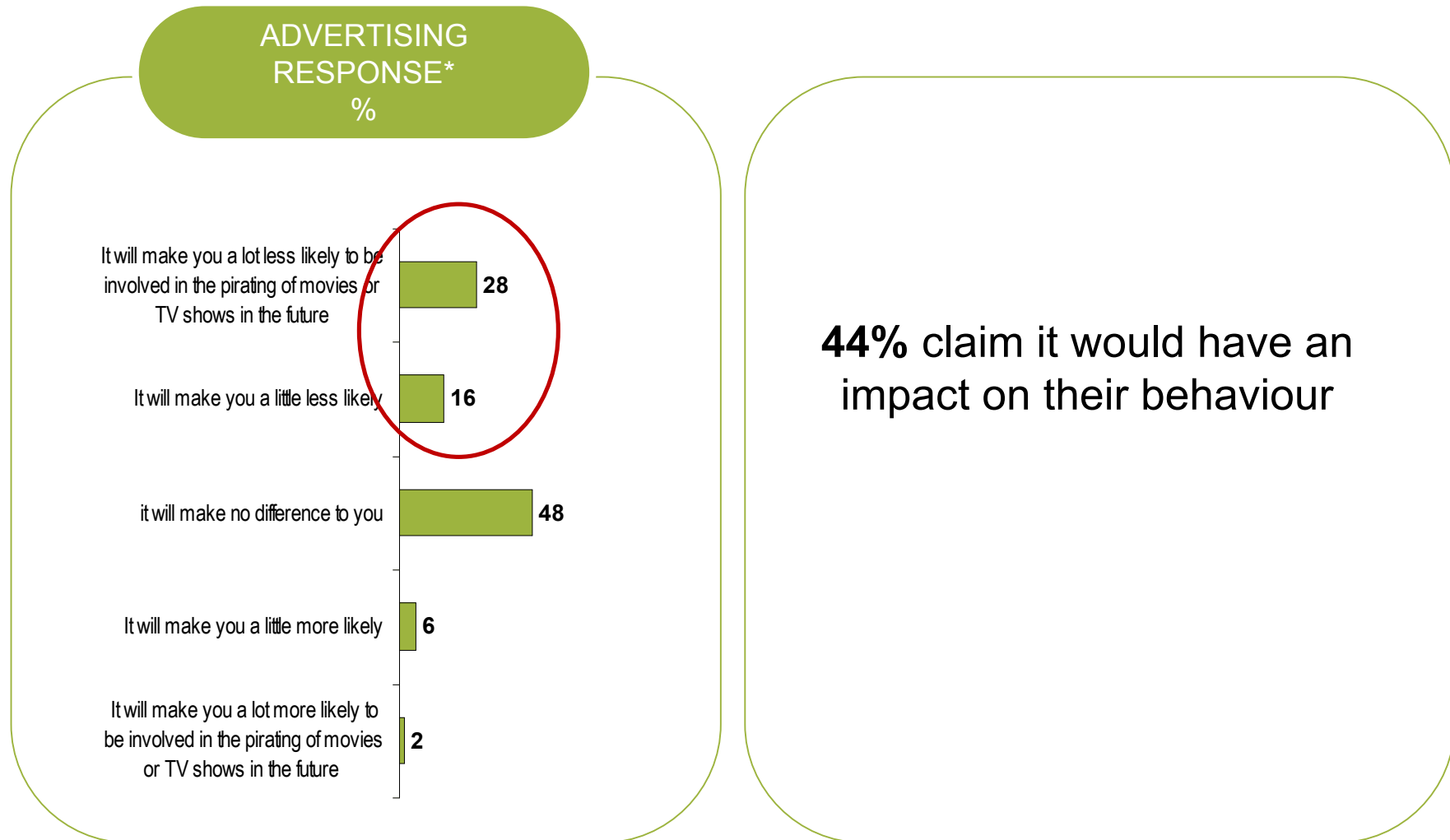
The ad has the ability to make people consider the issue of piracy.

The conscious move to be less confrontational appears to have been noticed.

BASE:: TOTAL SAMPLE, 2011 (N=1644);

\* THIS QUESTION WAS ASKED REGARDKLESS OF WHETHER THE RESPONNET RECALLED SEEING THE AD BEFORE OR NOT

# Advertising response



BASE:: TOTAL SAMPLE, 2011 (N=1644);

\* THIS QUESTION WAS ASKED REGARDKLESS OF WHETHER THE RESPONDENT RECALLED SEEING THE AD BEFORE OR NOT



# Intellectual Property Awareness Foundation

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