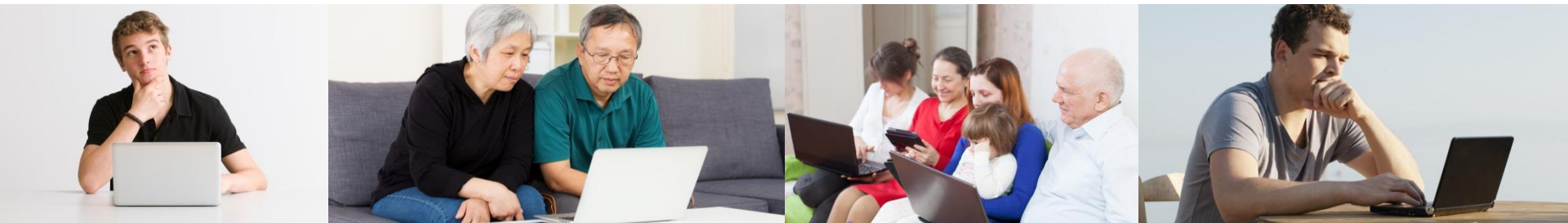


# Project Rebel

Australian Piracy Behaviours

May 2016 – Wave 8 Adults Aged 18-64

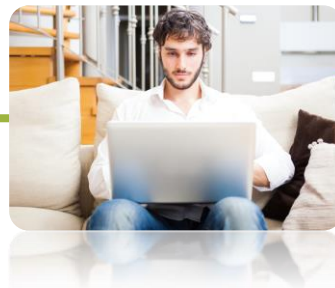


# Methodology

## Online quantitative research

18-23<sup>rd</sup> May 2016

- 1010 respondents aged 18-64
- National coverage
- Up-weighted to ABS data on age, highest level of schooling, sex and area to be representative of total population



# Since Wave 7 the shift in behaviour has continued

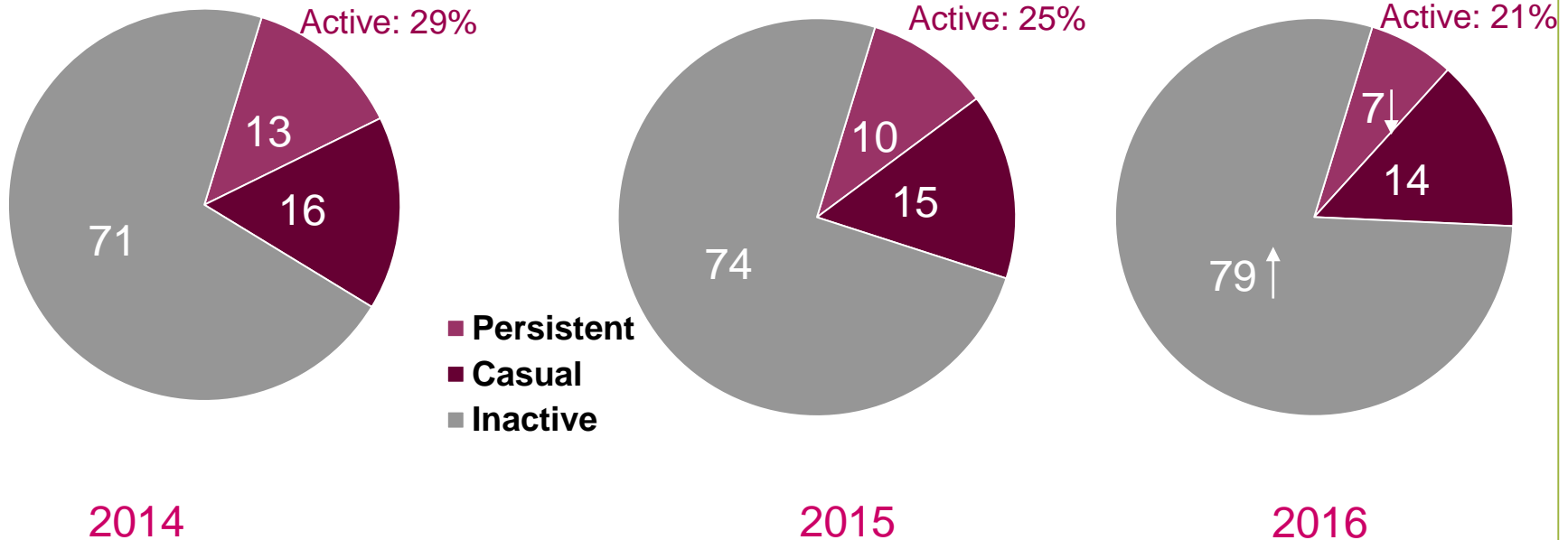
- A further fall in reported participation levels
  - The most active becoming a smaller proportion
- And a corresponding drop in frequency
  - Downloading TV shows in particular
- The uptake of subscription streaming services continues
  - Particularly Netflix
- A suggestion that piracy is also becoming less socially acceptable



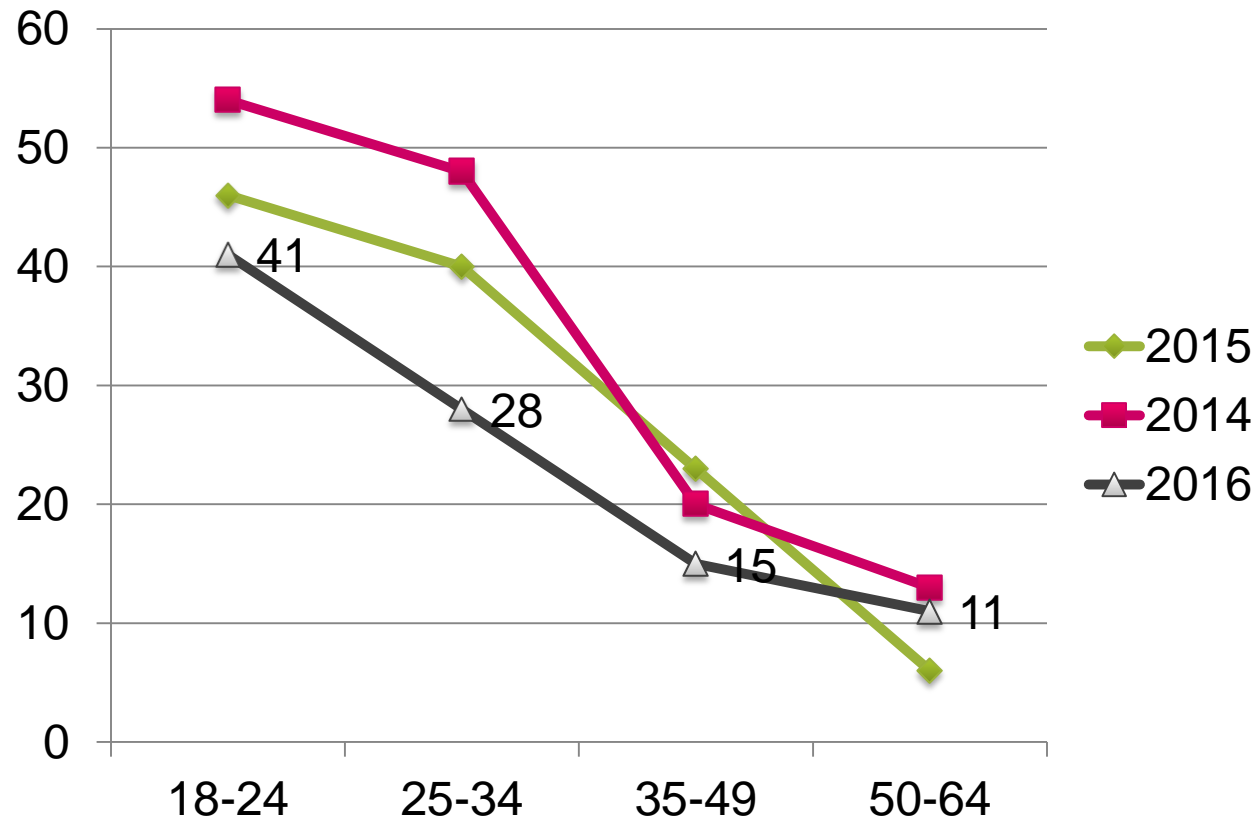
Streaming services have highlighted and reframed piracy activity

# The fall in participation continues – the most active segment becoming more concentrated

Pirated movies or TV shows – Ever done

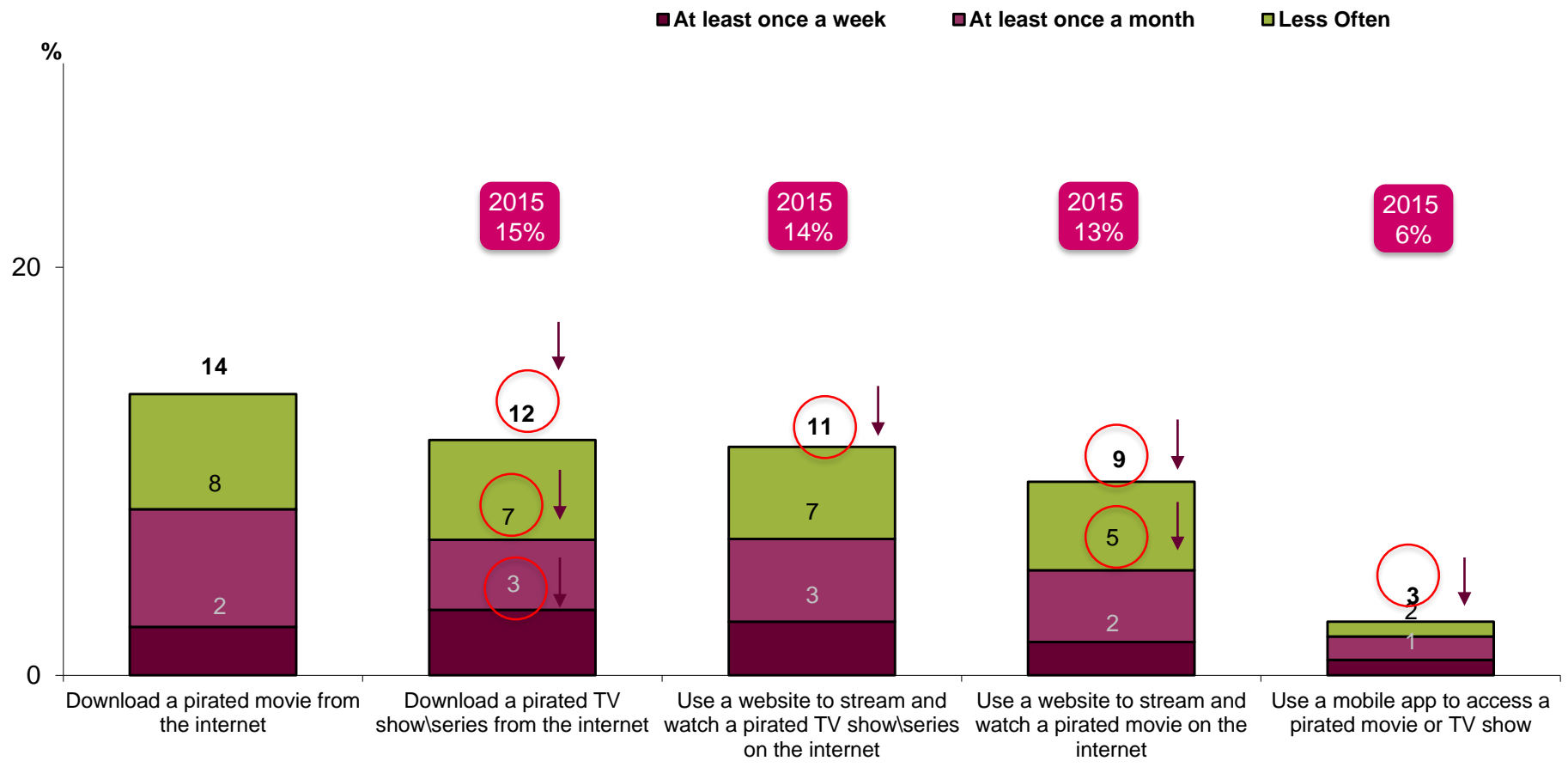


# Though the older age groups are getting in on the game



Base: 18-24 n=144; 25-34 n=222; 35-49 n=317 ; 50-64 n=327  
Percentage of Active Pirates

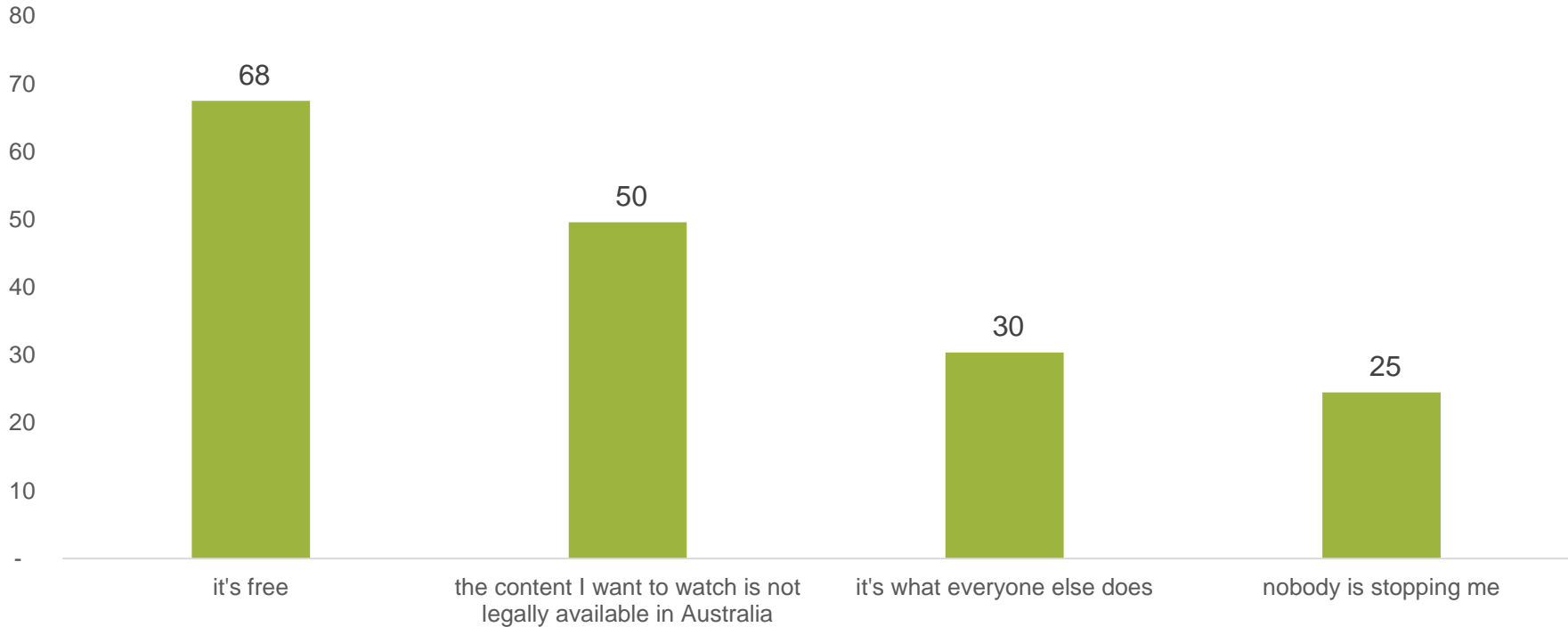
# Frequency also appears to be declining – across activities



Base: Total sample n=1010. ↓ Significant change at the 95% confidence level vs. August 2015  
 P3. Please indicate how often you do each of these activities.

# Payment still a hurdle for pirates

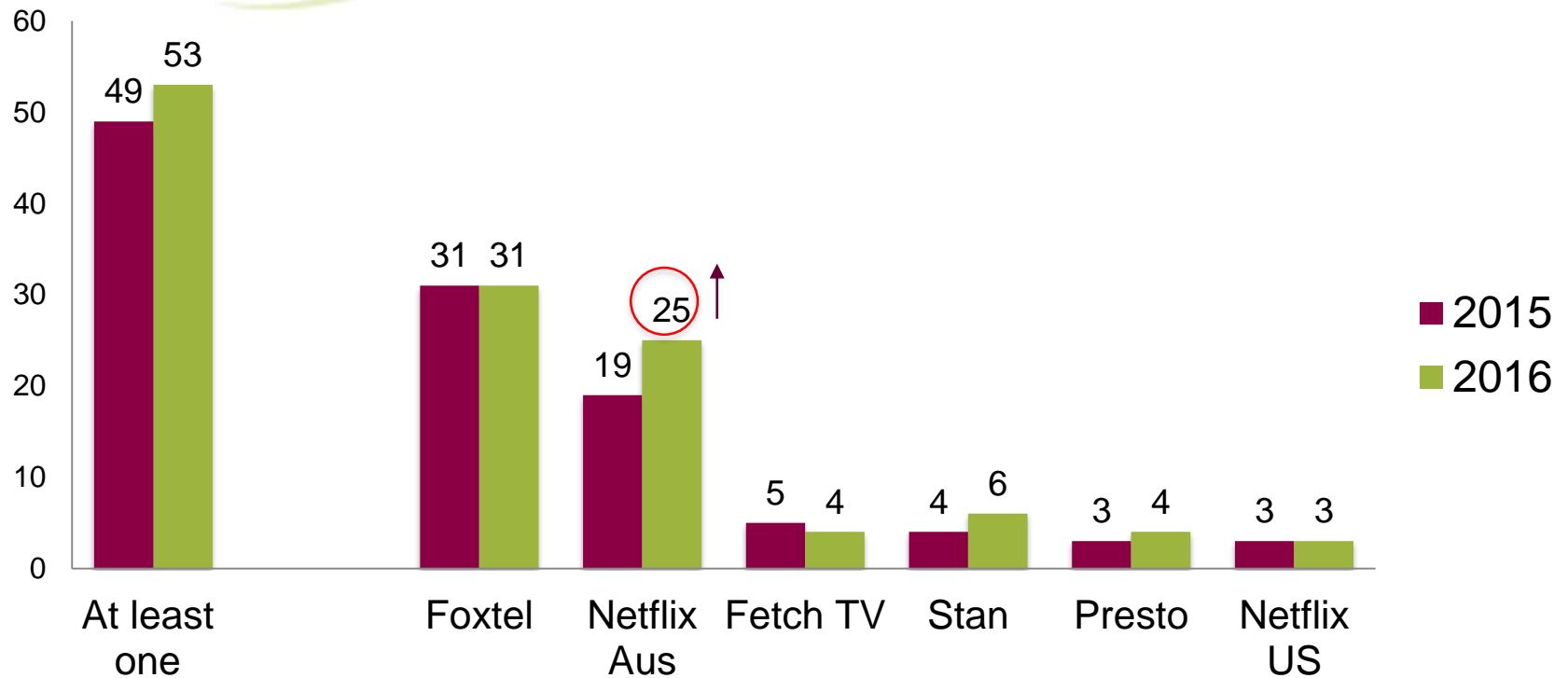
Most pirates agree they pirate because it's free



Base: Total pirates n=369

P3b Please Indicate if it is, or is not a reason why you download or stream pirated movies or TV shows\ series?

# There is somewhere else to go....

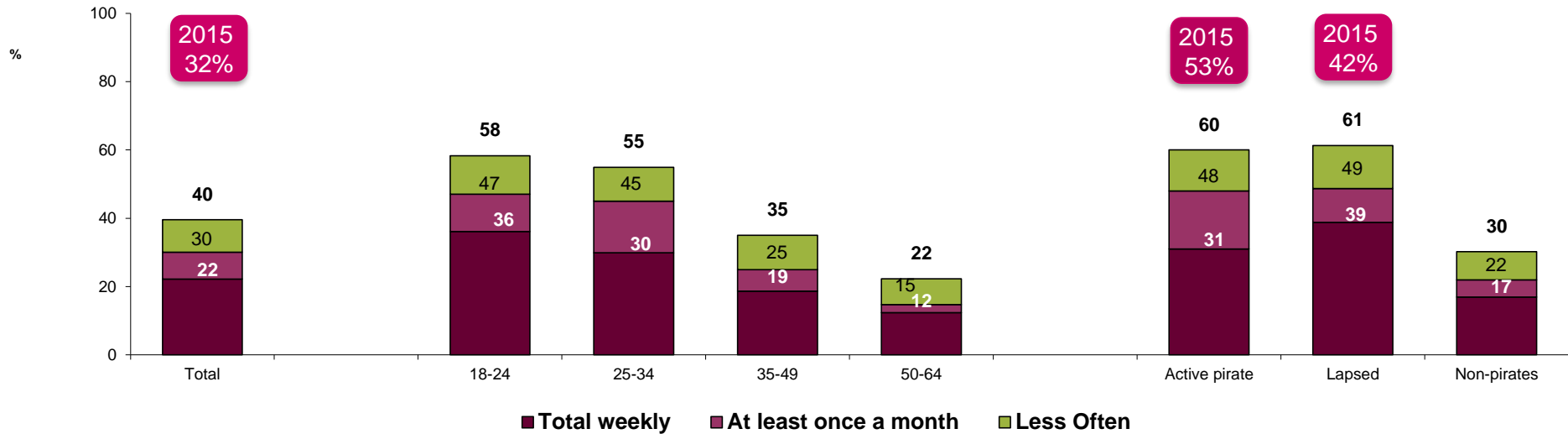


→ Overall 16% are on free SVOD trial (33% in August 2015)



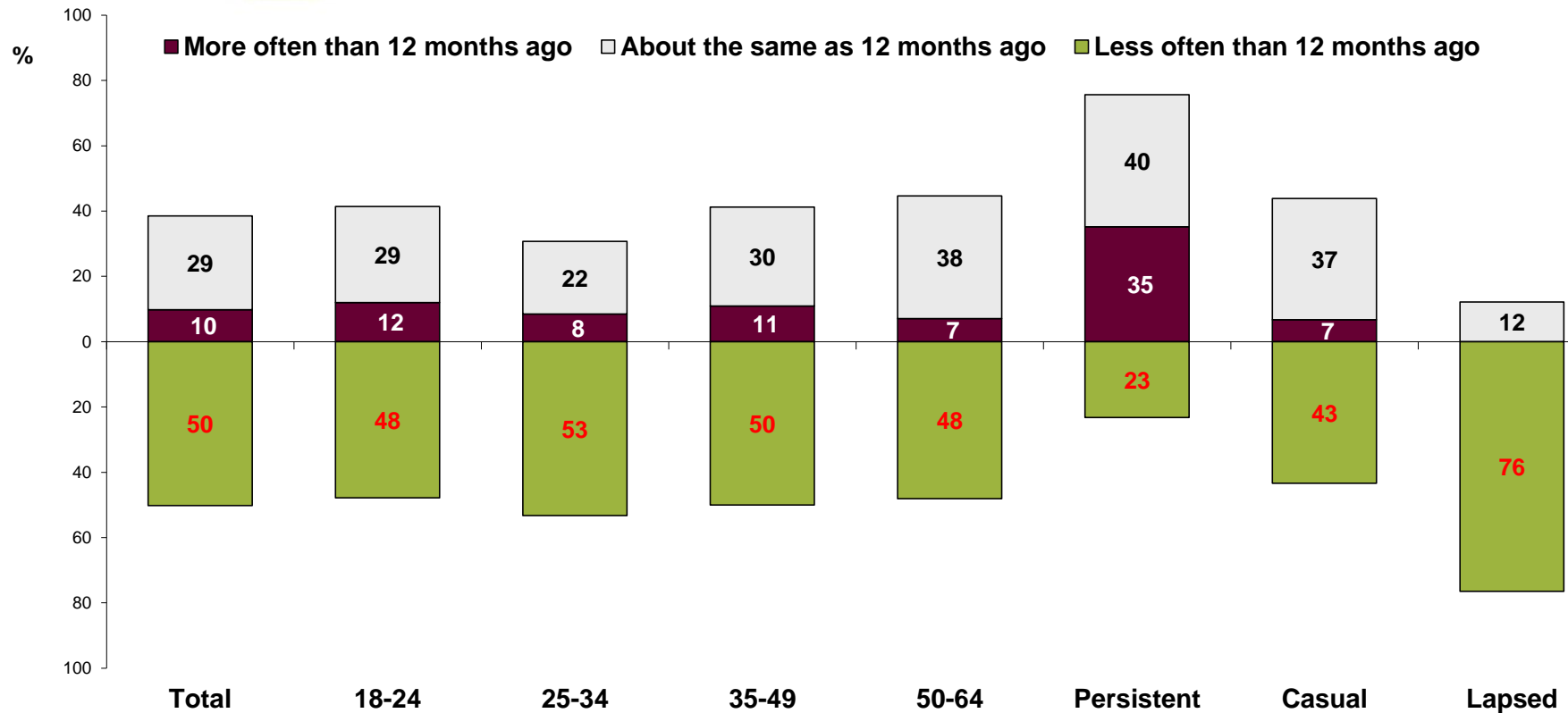
# ...and the alternative is popular with pirates

Stream via an Australian online subscription service (e.g. Netflix, Stan, Presto)



Base: Total sample n=1010; 18-24 n=144; 25-34 n=222; 35-49 n=317 ; 50-64 n=327; Active pirates n=214; Lapsed pirates n=113; Non-pirates n=683.  
B1. Thinking now about your general viewing of movies and TV shows. Please indicate **how often**, if ever, you do each of the following.

# People believe they are pirating less – but fewer than in 2015



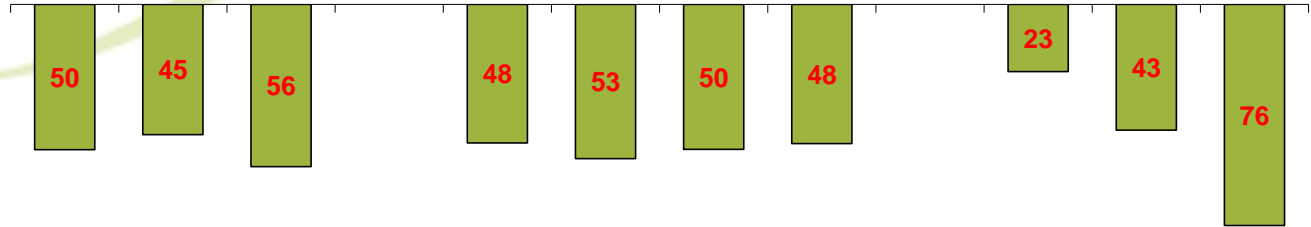
Those with streaming subscriptions more likely to say they pirate less than they reported 12 months ago

Base: Total sample n=1010; 18-24 n=144; 25-34 n=222; 35-49 n=317 ; 50-64 n=327; Persistent pirates n=72; Casual pirates n=142; Lapsed pirates n=113.

P4 Compared with 12 months ago, would you say you are now streaming or downloading pirated movies and TV shows / series more often, less often or about the same

# Legal alternatives the most given reason for the reported decline

% who are streaming or downloading pirated content less often

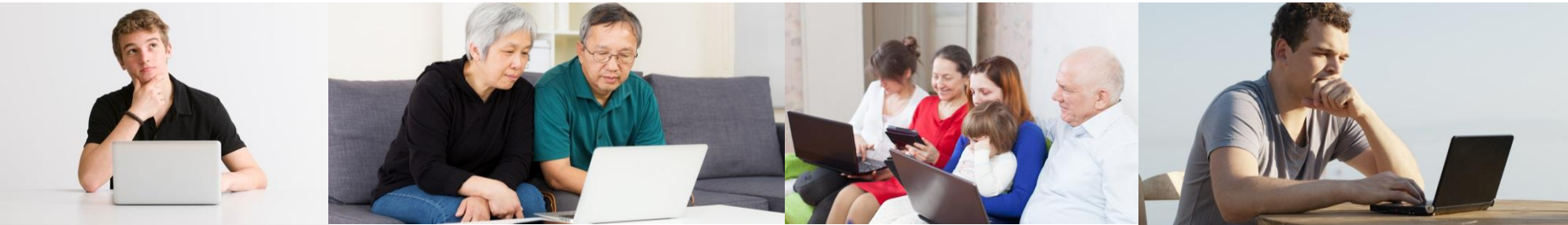


Main reason why they are doing it less often ...

	Total	Male	Female	18-24	25-34	35-49	50-64	Persistent	Casual	Lapsed
<b>Legal alternatives</b>										
• subscribed to a new streaming service or got a free trial to a new streaming service or was able to find the content I wanted online without pirating	37%	40%	35%	52%	43%	22%	32%	52%	47%	33%
<b>Moral Justification</b>										
• Felt bad about pirating or because piracy is stealing / theft	25%	22%	29%	18%	18%	34%	38%	20%	14%	28%
<b>Self Interest</b>										
• I'm worried about getting viruses on my computer or I'm worried about getting caught pirating	11%	9%	13%	2%	15%	16%	8%	6%	9%	18%
I didn't have time to do it anymore	13%	16%	11%	14%	13%	12%	16%	17%	19%	6%
Other reason	9%	11%	8%	10%	9%	12%	4%	0%	5%	13%

Base: Total sample who are doing it less n=187; Male n=91; Female n=96; 18-24 n=43; 25-34 n=63; 35-49 n=51; 50-64 n=30; Persistent pirates n=17; Casual pirates n=65; Lapsed pirates n=86; P5 Which one of the following reasons best explains why you think you are downloading or streaming less than 12 months ago?

But attitudes are also shifting.....

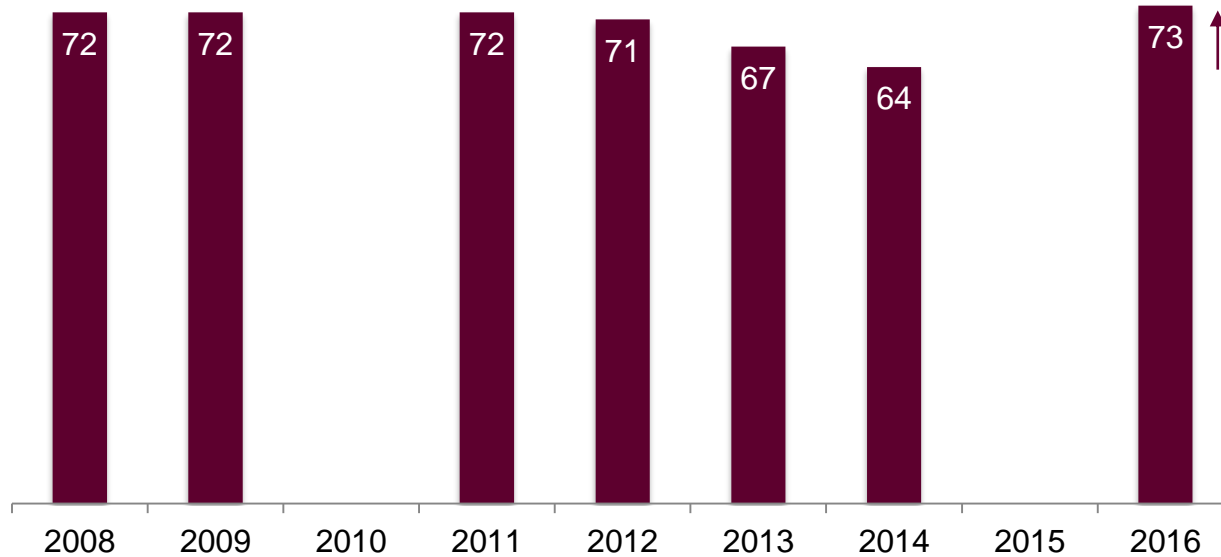


# Highest recorded agreement that piracy is stealing or theft



Downloading or streaming pirated content is stealing\theft

*% agree*

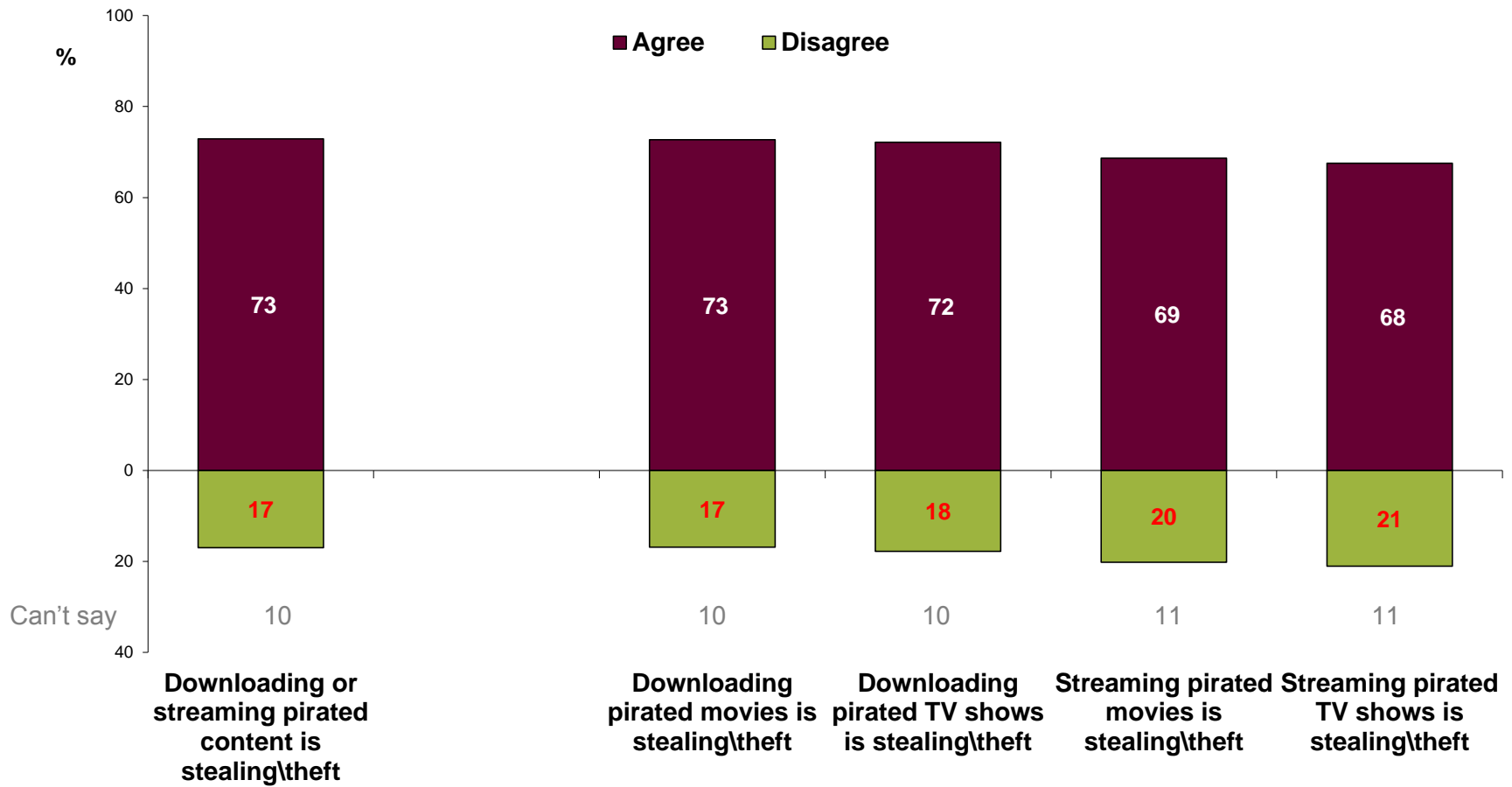


Base: Total sample n=1010 in 2016, n=1189 in 2014, n=1229 in 2013 and n= 1654 in 2012, n= 1644 in 2011, n=1372 in 2009 and n=1216 in 2008

P6 Thinking about the pirating of movies or TV shows online, how much you agree or disagree with the statement "Downloading or streaming pirated content is stealing\theft"?

# Little differentiation between methods

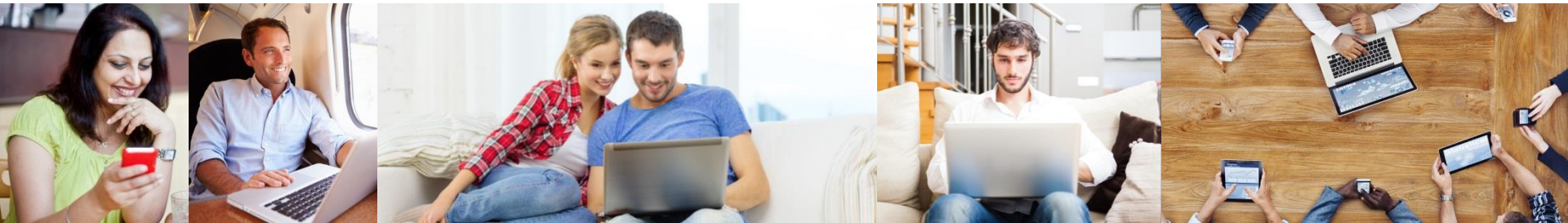
Piracy is stealing \ theft



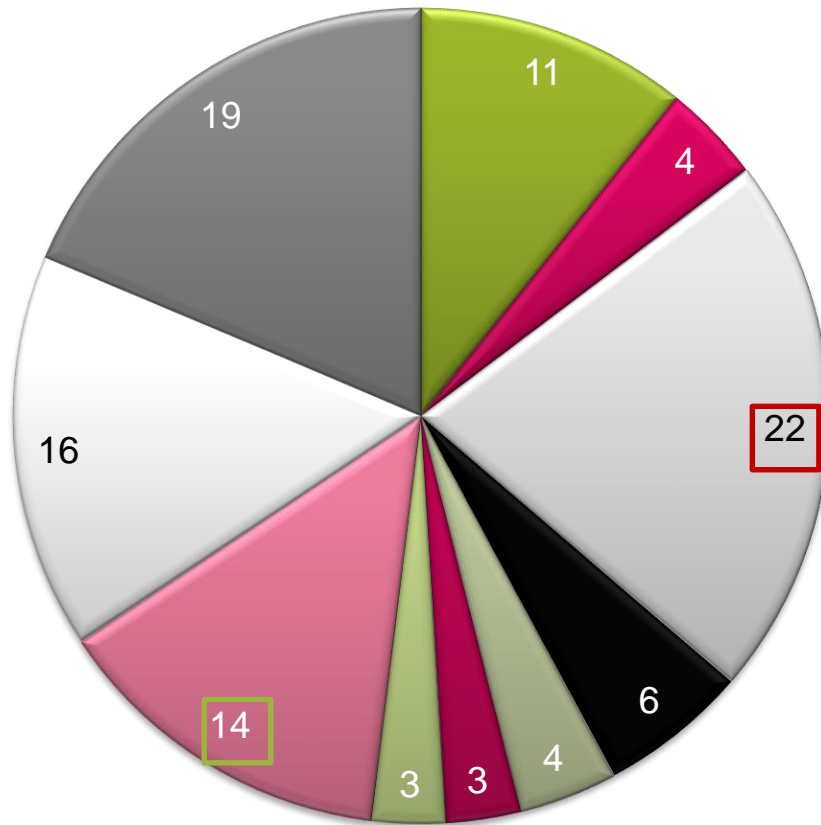
Base: Total sample n=1010; Male n=495; Female n=515; 18-24 n=144; 25-34 n=222; 35-49 n=317 ; 50-64 n=327; Active pirates n=214; Lapsed pirates n=113; Non-pirates n=683.

P6 Thinking about the pirating of movies or TV shows online, please indicate how much you agree or disagree with each of these statements?

# What do Australians think would work to reduce piracy further?



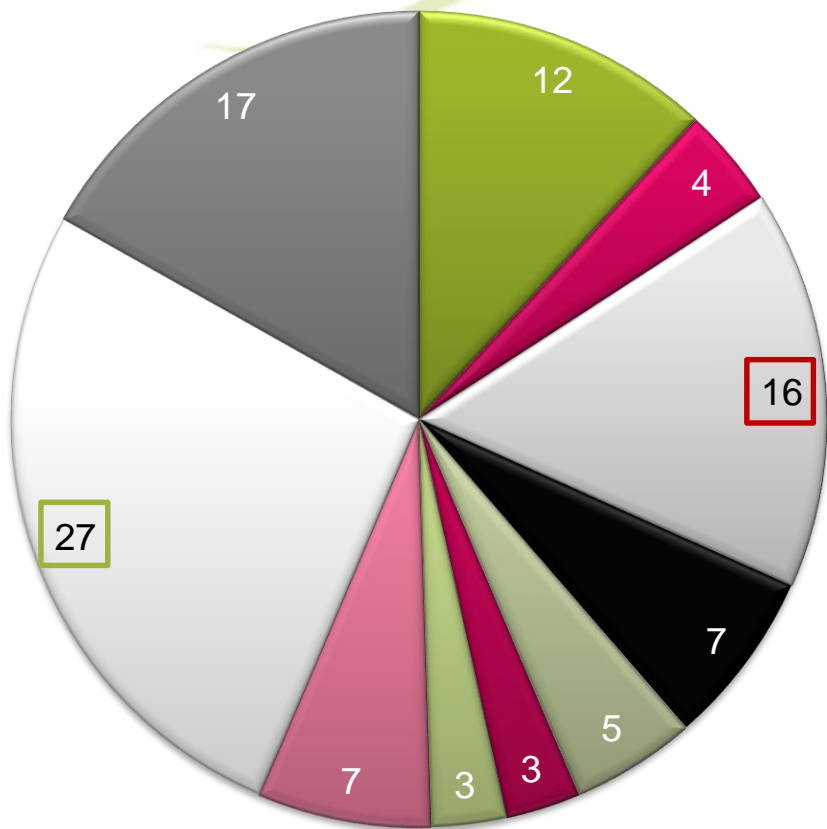
# Most anticipate blocking would be effective in reducing piracy behaviour



- A fine or penalty
- Internet Service Provider slows down (throttles) the service if downloading excessively
- Blocking of sites that profit from pirated content
- A warning letter from the Internet Service Provider
- The Internet Service Provider provides personal details to the rights holder of the pirated content
- Reading about someone who has been caught and fined in Australia
- Knowing someone who has been caught and fined in Australia
- Making it illegal for search engines to provide links to sites that profit from pirated content
- None of these
- Can't say



# Active pirates are slightly less convinced



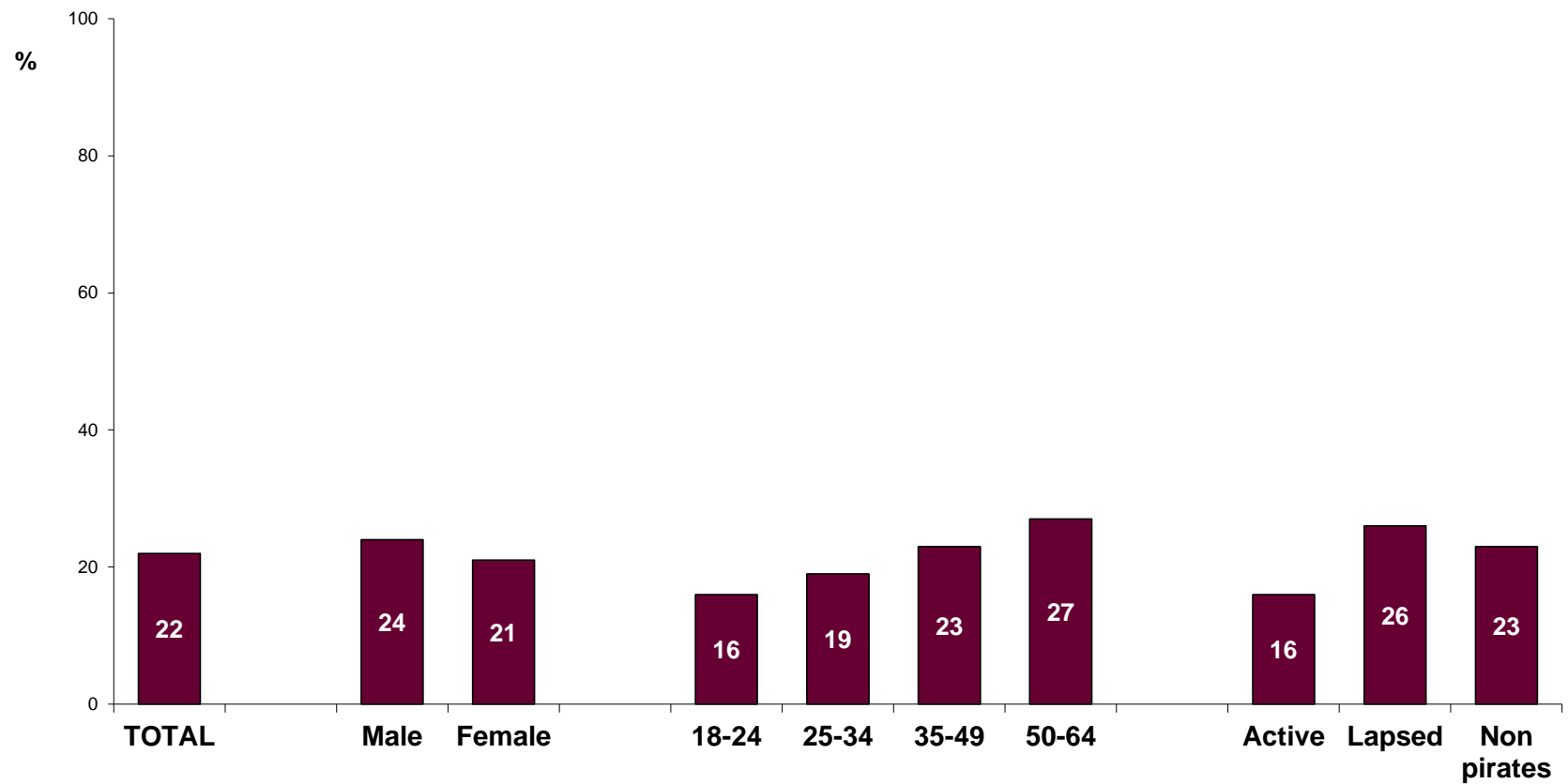
- A fine or penalty
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- A warning letter from the Internet Service Provider
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- Reading about someone who has been caught and fined in Australia
- Knowing someone who has been caught and fined in Australia
- Making it illegal for search engines to provide links to sites that profit from pirated content
- None of these
- Can't say

Base: Active pirates n=214

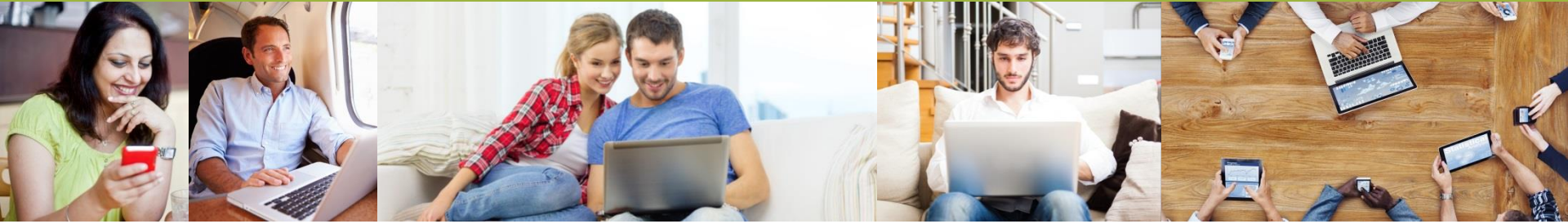
P7 And which one of the following measures, if any, do you think would be the most effective in reducing online movie and TV piracy?

# And less certain of the impact of blocking

## Blocking of sites that profit from pirated content



Base: Total sample n=1010; Male n=495; Female n=515; 18-24 n=144; 25-34 n=222; 35-49 n=317 ; 50-64 n=327; Active pirates n=214; Lapsed pirates n=113; Non-pirates n=683.  
 P7 And which one of the following measures, if any, do you think would be the most effective in reducing online movie and TV piracy?



# Project Rebel

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