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Search



THE ROLE OF SEARCH IN CONTENT PIRACY

AUSTRALIAN SURVEY
KEY FINDINGS
MARCH 2018

THE PURPOSE OF THIS STUDY FURTHER UNDERLINED BY THE
CENTRAL INSIGHT INDICATED BY THE RESULTS

CORE OBJECTIVE FROM THE BRIEF

HOW CAN THE **ROLE OF SEARCH** IN FACILITATING
PIRACY IN AUSTRALIA BE **DIMINISHED?**

WHAT WE FOUND

SEARCH NOT ONLY **FACILITATES** PIRACY,
EVIDENCE SUGGESTS IT ALSO **PROMOTES** IT



5 KEY INSIGHTS

- 1 SEARCH'S BIGGEST ROLE IS IN **DISCOVERY**, PARTICULARLY FIRST TIME USERS
- 2 MORE WIDESPREAD **SITE BLOCKING** A CRITICAL DETERRENT
- 3 THERE'S NO REAL DIFFERENCE IN SEARCH BEHAVIOURS BY **TYPE** OR **AGE OF CONTENT**
- 4 EVIDENCE SUGGESTS **SEARCH RESULT ORDER** IMPACTS WHETHER INFRINGING CONTENT IS CONSUMED
- 5 **SEARCH TERMS** ARE MOSTLY GENERIC BUT EVIDENCE SUGGESTS **AUTOCOMPLETE** EXACERBATES PIRACY



RESEARCH METHODOLOGY

- 20 minute online survey
- In field 8th Dec-20th Dec 2017
- n=1000 Australians aged 18+ who engage in direct piracy
- Quotas applied to be representative of Australian piracy 'market' on
 - Gender
 - Age
 - Region
 - SARI piracy segment membership
- Questioning spans
 - General and specific piracy behaviours
 - Hypothetical scenario testing



ABOUT SARI'S PIRACY SEGMENTATION



ANXIOUS ADDICTS

Love content and feel guilty about downloading. Moved by campaigns and worried about notices or fines.

22% of Australian pirates



OUTRAGED OUTLAWS

Not worried about ethics, legality or the effect on the industry - the most difficult to change behaviour.

20% of Australian pirates



NERVOUS NEWCOMERS

New to downloading with low content engagement. Moved by campaigns and worried about notices or fines.

27% of Australian pirates

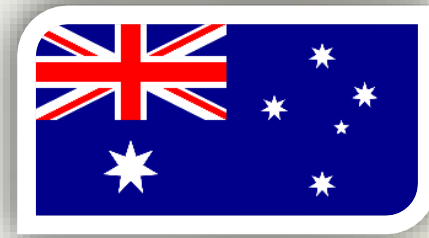


CONSCIOUS COWBOYS

Understand the ethics and legalities of downloading, but feel "forced into it" and justify their behaviour.

31% of Australian pirates





SEARCH

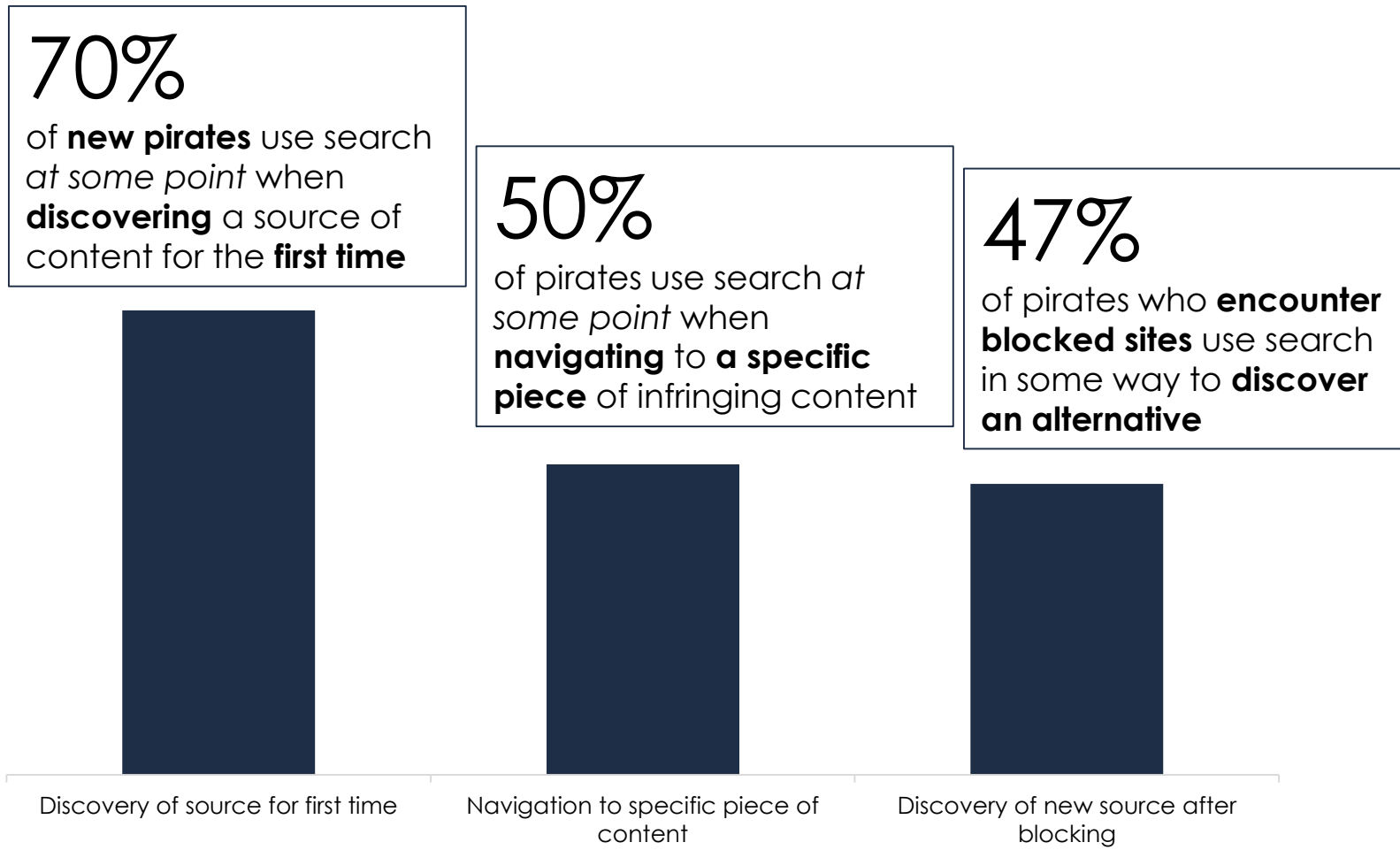
SEARCH'S
BIGGEST ROLE IS
IN **DISCOVERY**,
PARTICULARLY
FIRST TIME USERS

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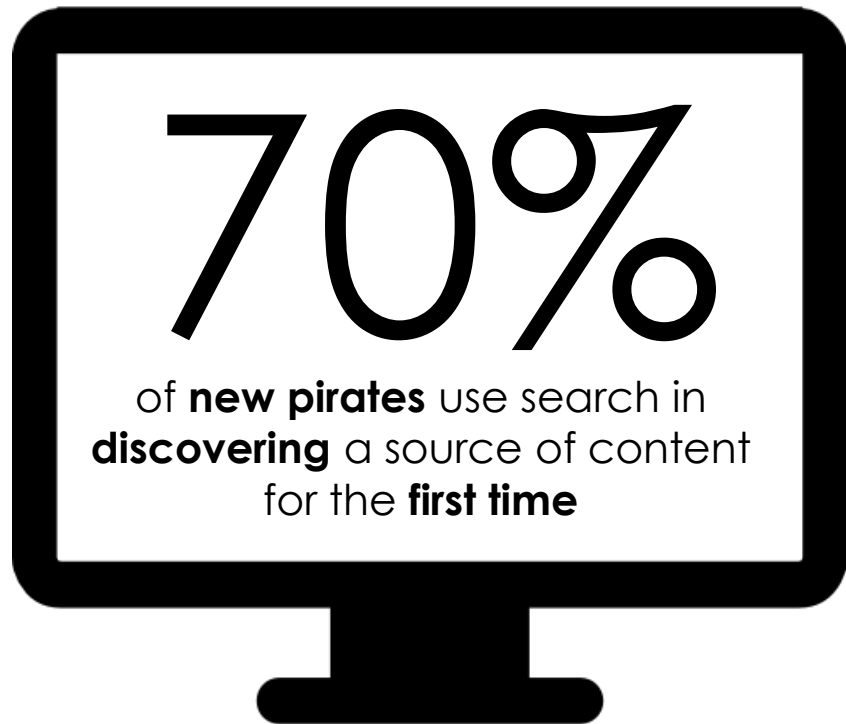
SEARCH MORE WIDELY USED IN INITIAL DISCOVERY OF SOURCES THAN IN NAVIGATION OR ENCOUNTERING BLOCKS



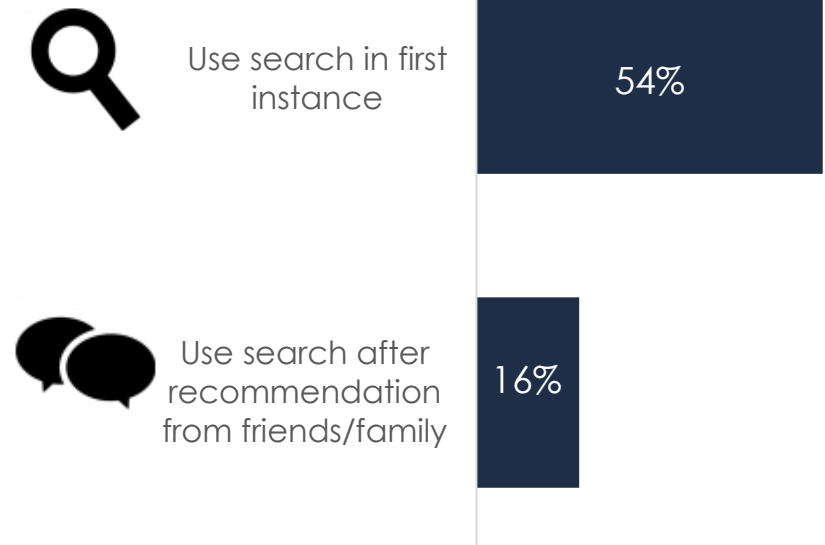
First time discovery: Question ST1d, ST1g / Base n=166
Navigation to specific content : Question ST3/4/5/6a, ST3/4/5/6f / Base n=1051
Discovery after blocking: Question gb12, GB13a, GB13b, GB13c, / Base n=443

THE MAJORITY OF THOSE USING SEARCH FOR DISCOVERY DO SO AS A FIRST PORT OF CALL

HYPOTHETICAL SCENARIO TEST: BEHAVIOUR DURING CONTENT SOURCE DISCOVERY (NEW PIRATES ONLY)



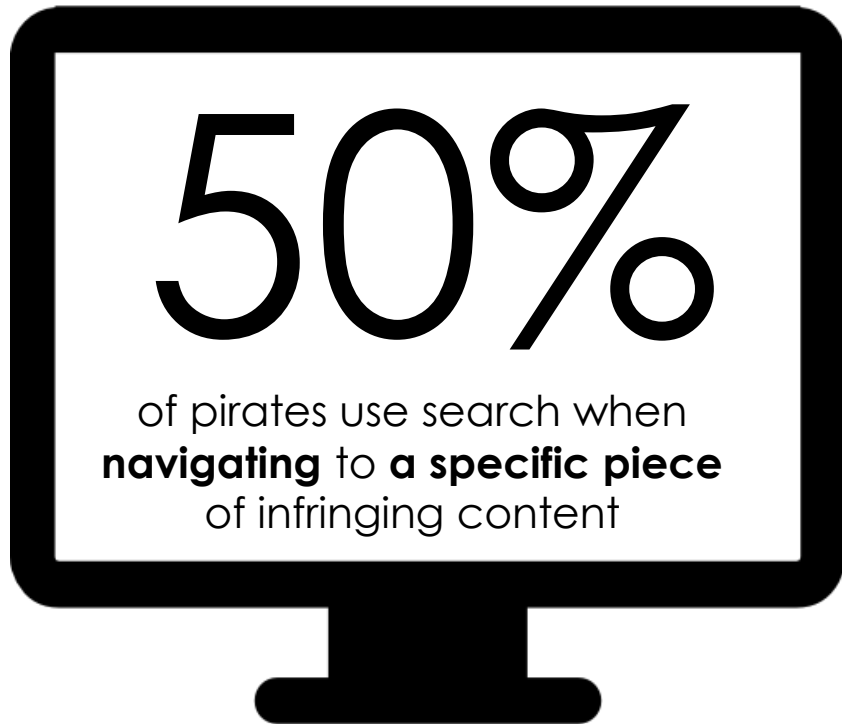
HOW SEARCH IS USED IN DISCOVERY



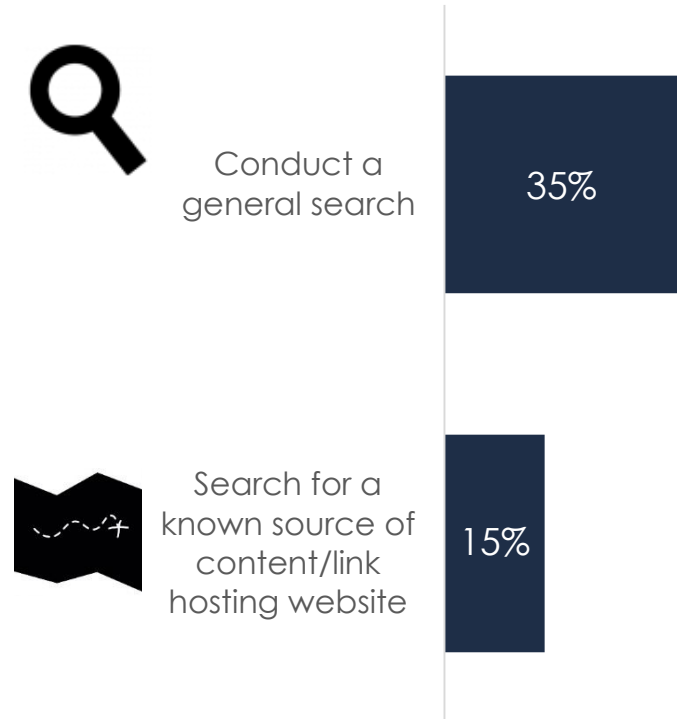
Question: ST1d. Which of the following best describes the first thing you did that led to you discovering this source of content that you currently use?
ST1g. You said you got advice from [a friend or family member / article or blog / social media]. After receiving that recommendation, which of the following best describes how you went about going to that site?
Base n=166

USE OF SEARCH IN NAVIGATION IS MOST LIKELY TO BE GENERAL RATHER THAN FOR A SPECIFIC SOURCE

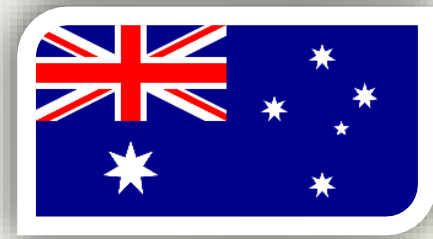
HYPOTHETICAL SCENARIO TEST: NAVIGATION BEHAVIOUR TO SPECIFIED PIECE OF CONTENT



HOW SEARCH IS USED IN NAVIGATION



Question ST3/4/5/6a What would you be most likely to do first to access this title?
ST3/4/5/6f And which of the following best describes how you would get to that site?
Base n=1051



SEARCH

MORE
WIDESPREAD **SITE**
BLOCKING A
CRITICAL
DETERRENT

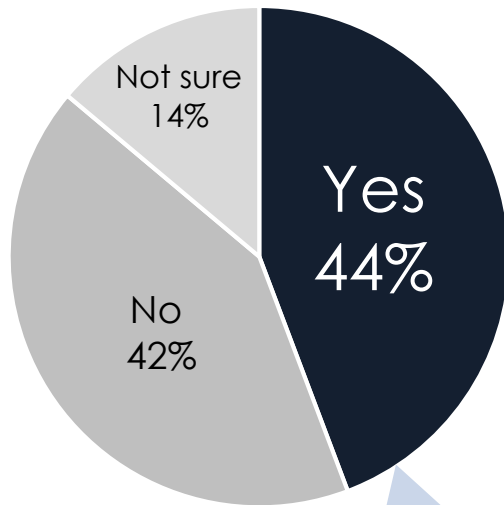
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ALMOST HALF OF AUSTRALIAN PIRATES HAVE ENCOUNTERED A BLOCKED SITE

EVER ENCOUNTERED BLOCKED SITE?



9%
of pirates have **encountered** a blocked site
and were **deterred** from accessing
infringing content (i.e. did not access content
or looked for a legitimate source)

Higher usage segments -
Outraged Outlaws and
Anxious Addicts - more likely
to have **encountered** a
blocked site

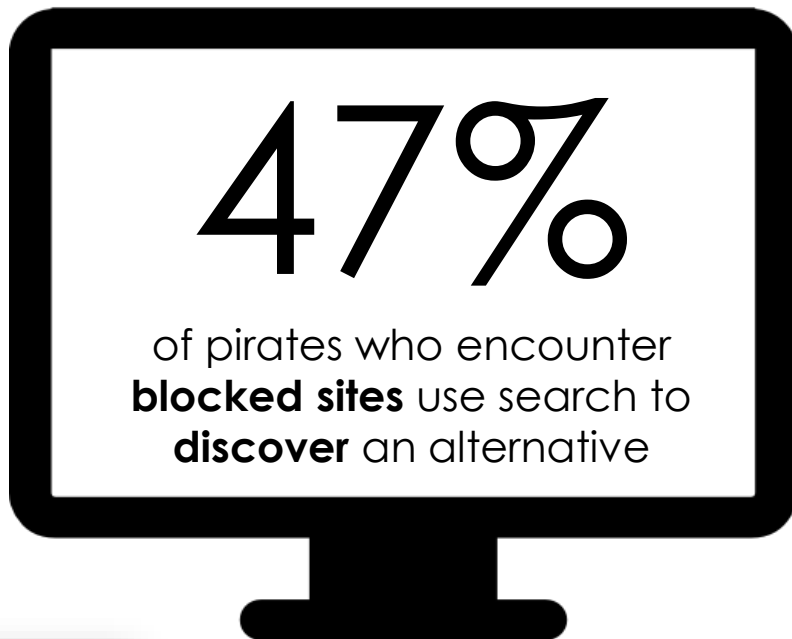
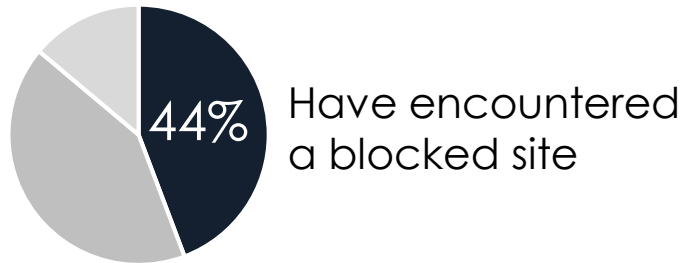
New pirates and Anxious Addicts
most likely to be **deterred** from
accessing infringing content by site
blocking. Outraged Outlaws least
likely to be deterred



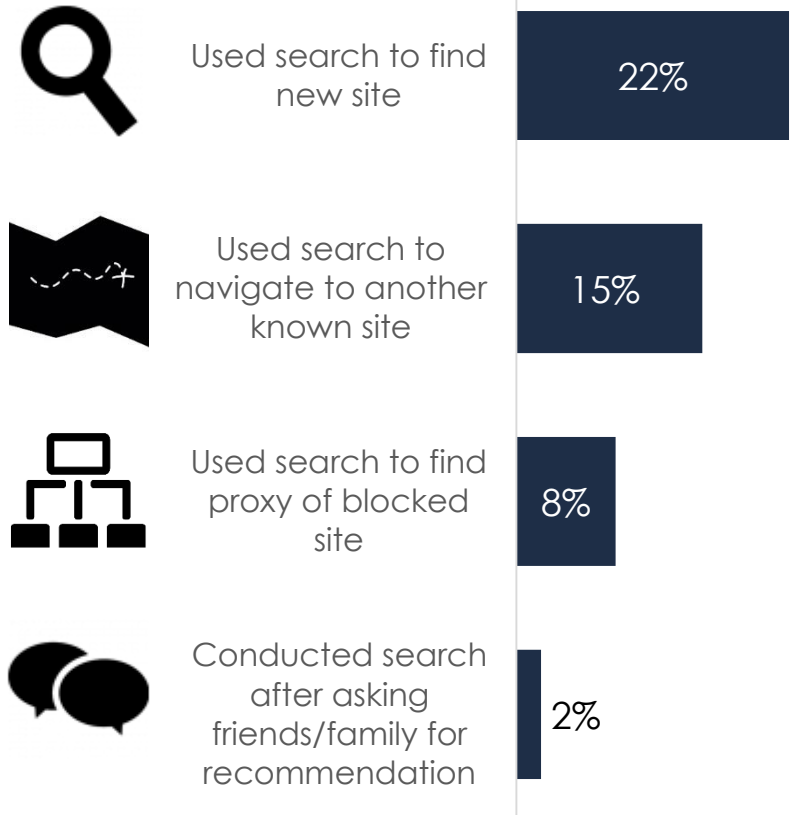
Question GB11 When trying to access a site that hosts unauthorized copies of (TITLE), have you ever encountered a message from your internet service provider saying that the site has been blocked or disabled?
GB12 Please think back to the most recent time you encountered a blocked site when trying to access unauthorized content. What did you do next? / Base n=1001

ALMOST HALF OF BLOCKED SITE ENCOUNTERS RESULT IN A SEARCH TO ACCESS INFRINGING CONTENT ANOTHER WAY

DISCOVERY AFTER BLOCKED SITE (REPORTED BEHAVIOURS)



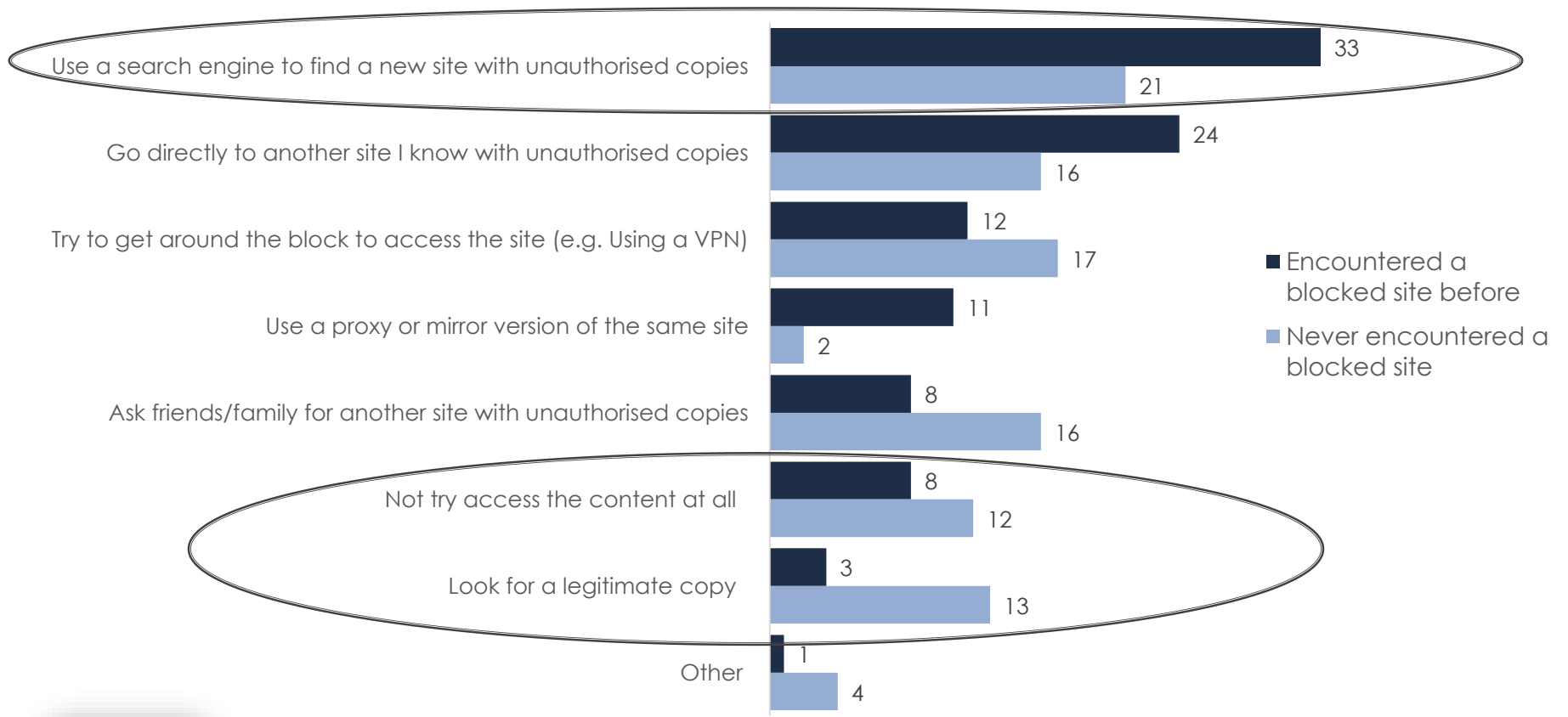
HOW SEARCH IS USED AFTER BLOCKING



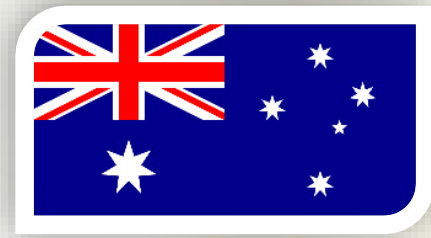
Question GB12 Please think back to the most recent time you encountered a blocked site when trying to access unauthorized content. What did you do next?
GB13b How did you reach the other site you knew about? GB13c How did you navigate to the site your friend or family member recommended? / Base n=443

PIRATES WHO'VE NEVER ENCOUNTERED A BLOCKED SITE LESS LIKELY TO USE SEARCH AND MORE LIKELY TO BE DETERRED

HYPOTHETICAL SCENARIO TEST: BEHAVIOUR IN EVENT OF ENCOUNTERING BLOCKED SITE



Question: ST2a. Now, please imagine that you've just discovered that a site you sometimes use to access unauthorized content online has been blocked and you can no longer access it. Which of the following would you be most likely to do? / Base Encountered n=120, NOT encountered n=103



NO REAL
DIFFERENCE IN
SEARCH
BEHAVIOURS BY
TYPE OR **AGE** OF
CONTENT

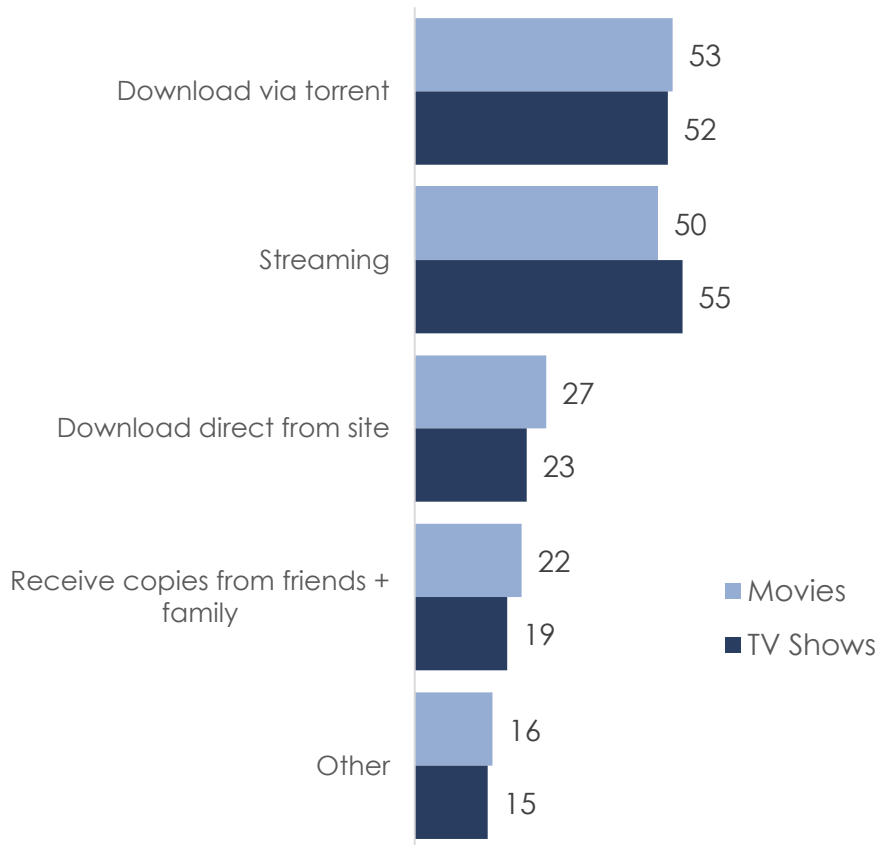
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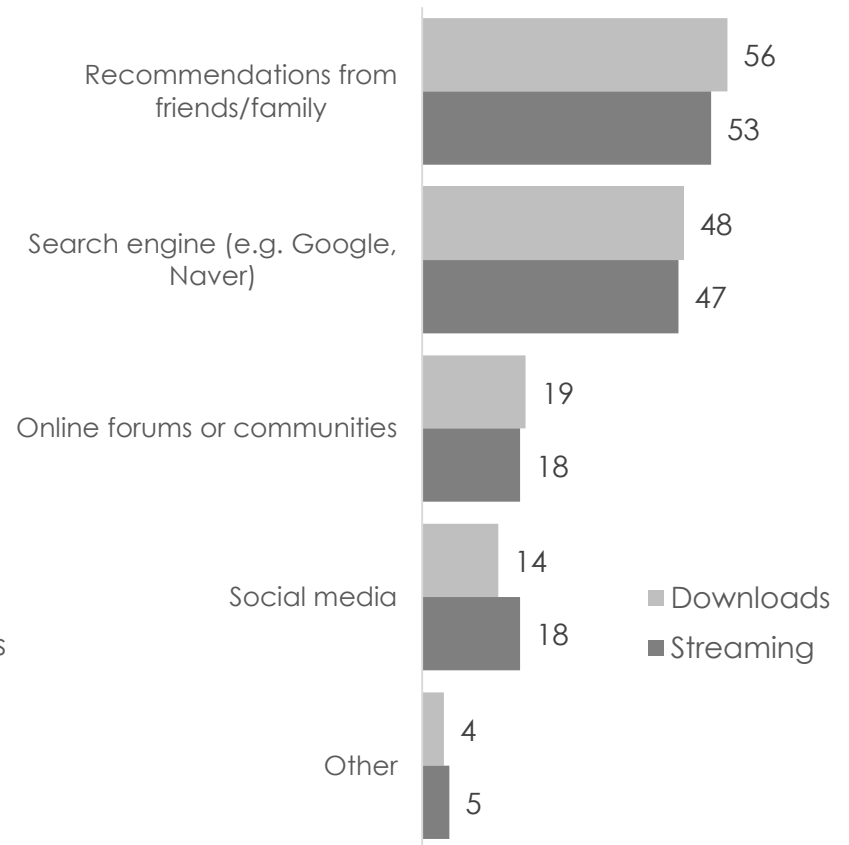
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NO REAL DIFFERENCES IN STREAMING VS DOWNLOADING BETWEEN MOVIES AND TV SHOWS OR IN DISCOVERY

% ACCESSING INFRINGING COPIES BY METHOD AND CONTENT TYPE



% USING DIFFERENT METHODS TO ACCESS UNAUTHORIZED CONTENT



Question: GB5 What methods do you typically use to access unauthorized copies of movies? GB7. How did you first find out about the websites that host unauthorized copies of [CONTENT TYPE] that you use for downloads and streaming... / Base n= 1001

NO DIFFERENCE IN SOURCES OF CONTENT FOR MOVIES VS TV SHOWS; NAVIGATION NOT DEPENDENT ON STREAMING VS DOWNLOAD

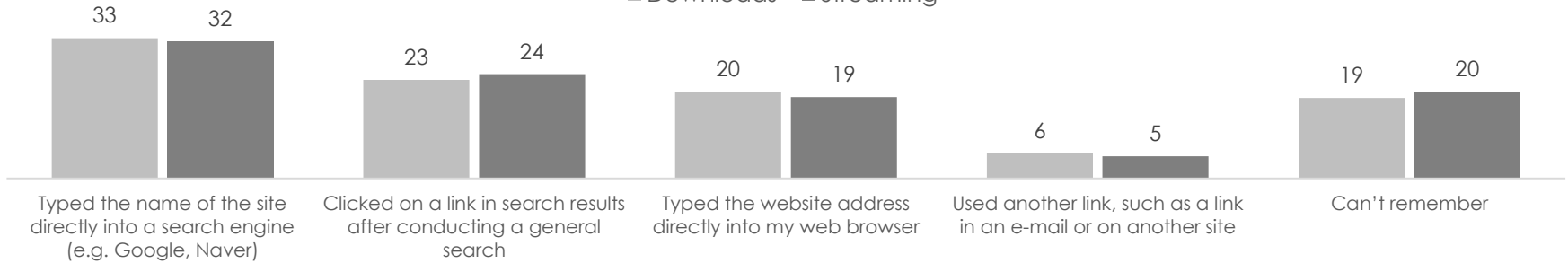
TOP PIRACY SITES ACCESSED BY TYPE OF CONTENT



Site	Movies	TV Shows
The Pirate Bay	29%	33%
PUT LOCKER	12%	12%
123MOVIES	9%	9%
KICKASS Torrents	6%	7%

NAVIGATION TO SOURCE BY METHOD OF ACCESS

■ Downloads ■ Streaming

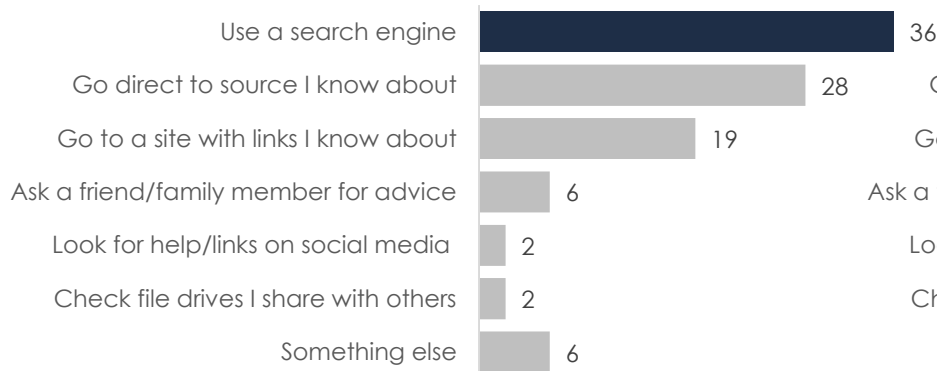


Question: GB6a. Which sites that host pirated/unauthorized copies of movies or TV shows can you recall using in the last 6 months? / GB8. Please think back to when you first came across or heard about the sites you typically use to access unauthorized content. How did you navigate to that site once you'd found out about it?
Base n=1001

MINIMAL DIFFERENCE IN ACCESS APPROACH BETWEEN OLDER AND NEWER TV SHOWS AND MOVIES

HYPOTHETICAL SCENARIO TEST: NAVIGATION BEHAVIOUR TO SPECIFIED PIECE OF CONTENT

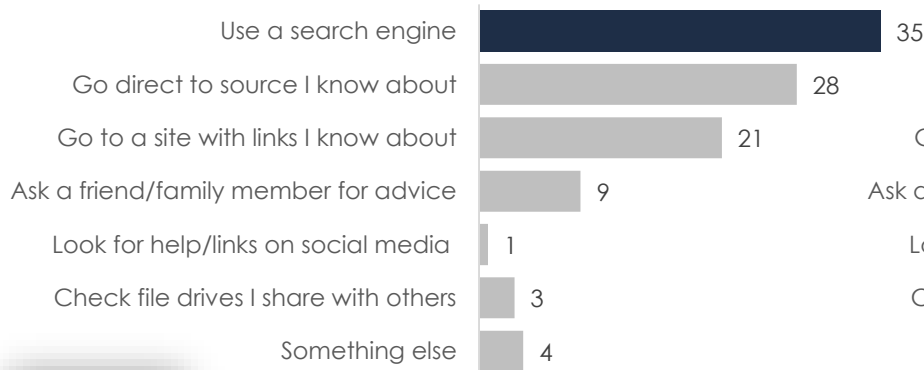
TITLE A (2017 MOVIE)



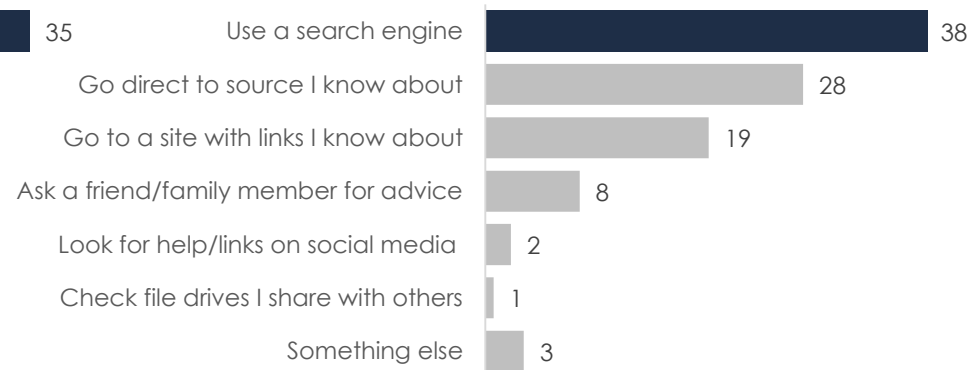
TITLE B (2017 TV SHOW)



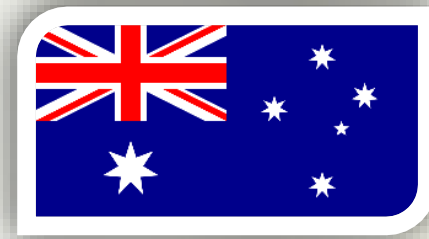
TITLE C (2015 MOVIE)



TITLE D (2015 TV SHOW)



Question: ST3/4/5/6a. What would you be most likely to do first to access this title?
Base n=261 - 268



EVIDENCE
SUGGESTS **SEARCH
RESULT ORDER**
IMPACTS WHETHER
INFRINGEMENT
CONTENT IS
CONSUMED

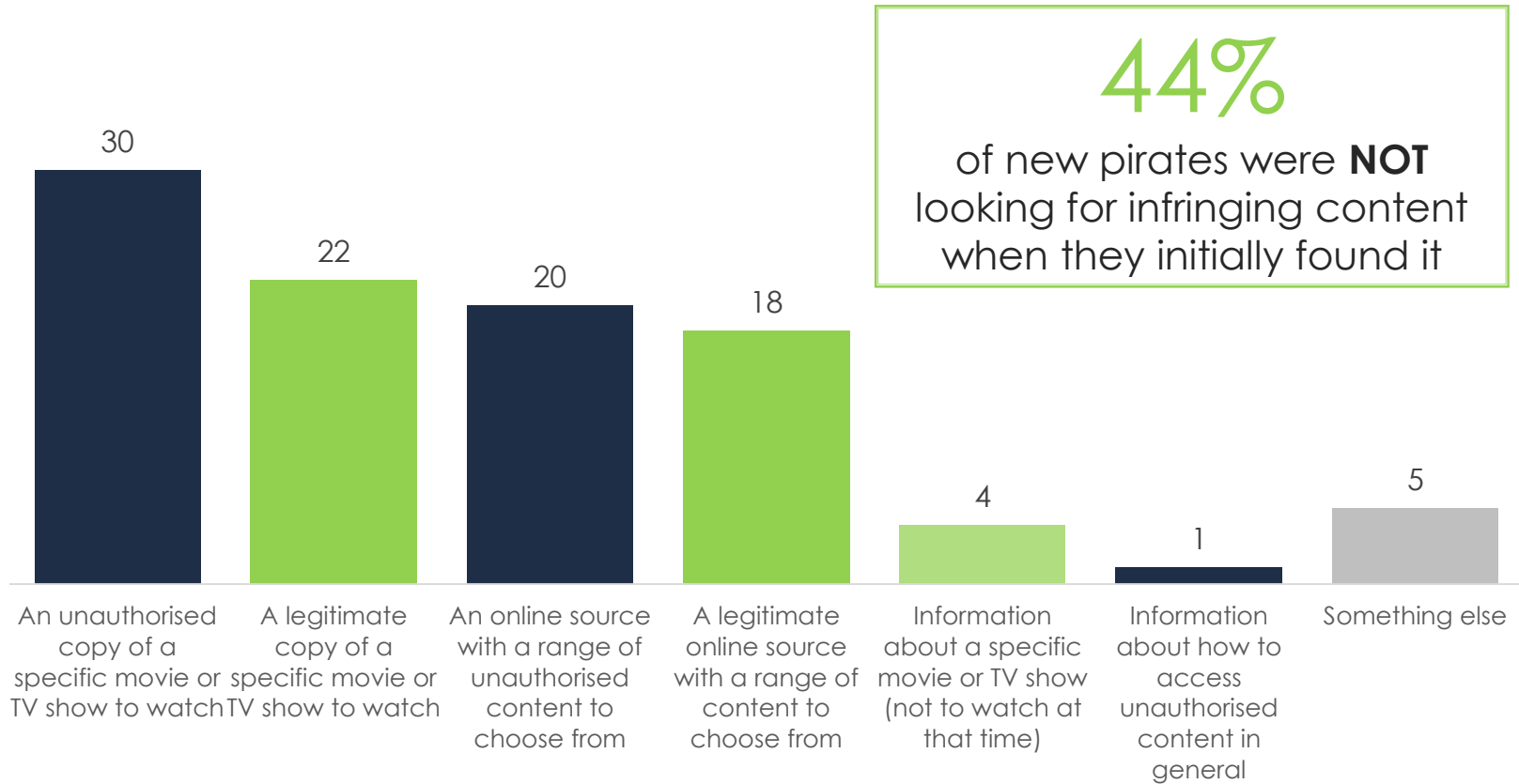
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THERE'S EVIDENCE THAT NEW PIRATES ARE DRAWN INTO INFRINGEMENT WHEN CONDUCTING LEGITIMATE SEARCHES

LOOKING FOR WHEN FOUND CONTENT SOURCE THEY USE NOW (NEW PIRATES)

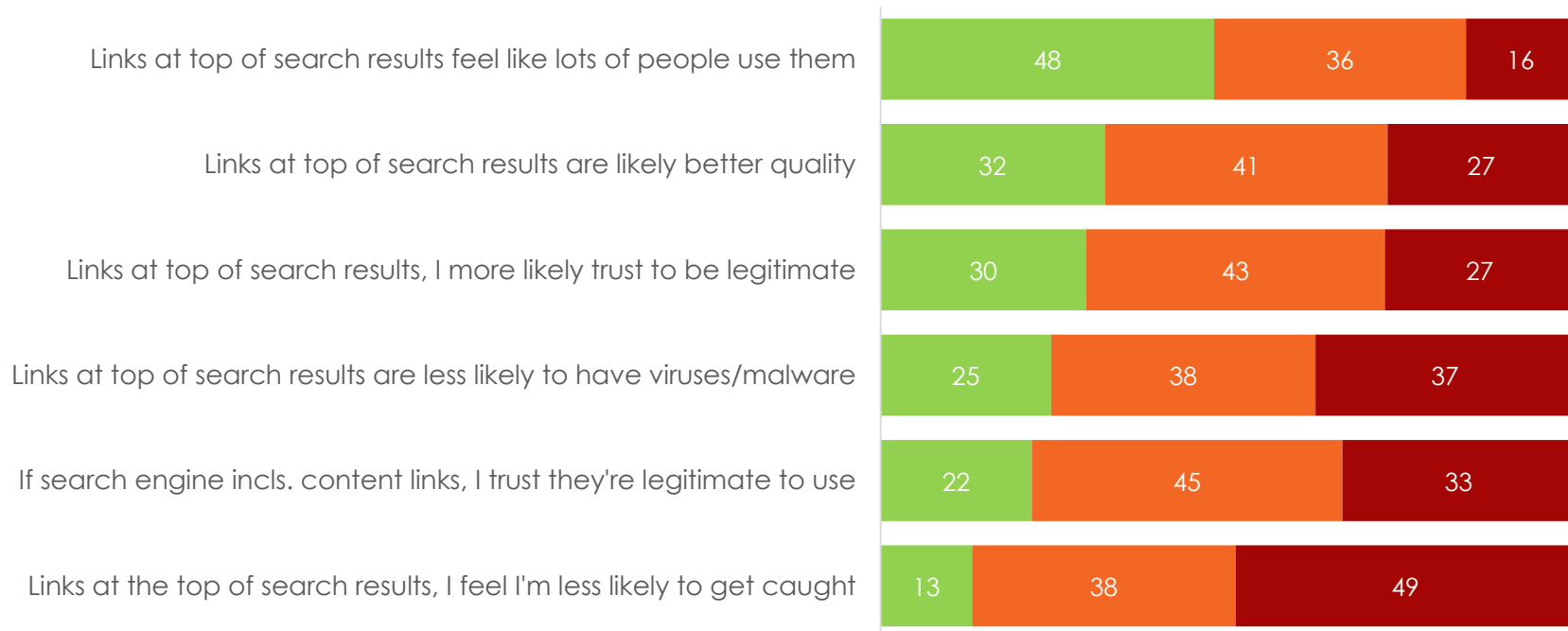


Question: ST1c. When you found this source, what were you originally looking for?
Base n=165

INFRINGING LINKS AT THE TOP OF SEARCH RESULTS UNDERLINES THE COMMON JUSTIFICATION THAT 'EVERYBODY DOES IT'

PERCEPTIONS OF LEGALITY/QUALITY/SAFETY BASED ON SEARCH RESULT ORDER

■ Agree + Strongly Agree ■ Don't Agree nor Disagree ■ Strongly Disagree + Disagree



Question: SB6a. Below are some statements other people have made in relation to the results for unauthorized streaming and download links to movies and TV shows that search engines return. How strongly do you agree or disagree that each describes you personally?
Base n= 1001

WE COMPARED SCENARIOS IN WHICH 'TOP' SEARCH RESULTS WERE STACKED WITH LEGITIMATE VS INFRINGING LINKS

LEGITIMATE FOLLOWED BY INFRINGING

- LEGITIMATE LINK
- LEGITIMATE LINK
- LEGITIMATE LINK
- LEGITIMATE LINK
- LEGITIMATE LINK
- LEGITIMATE LINK
- LEGITIMATE LINK
- LEGITIMATE LINK
- LEGITIMATE LINK
- PIRACY LINK
- PIRACY LINK

INFRINGING FOLLOWED BY MIX OF LEGITIMATE

- PIRACY LINK
- PIRACY LINK
- LEGITIMATE LINK
- PIRACY LINK
- PIRACY LINK
- LEGITIMATE LINK
- PIRACY LINK
- PIRACY LINK
- LEGITIMATE LINK
- LEGITIMATE LINK

WHEN LEGITIMATE SOURCES DOMINATE RESULTS, 3 TIMES AS MANY PIRATES CLICK ON LEGITIMATE LINKS

TOTAL

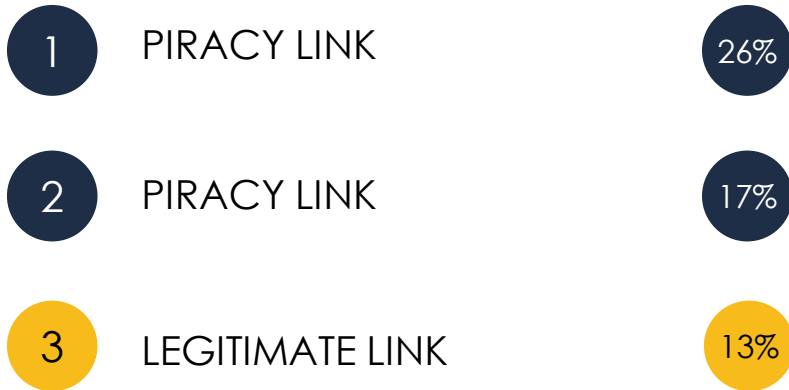
PERCEPTIONS OF LEGALITY/QUALITY/SAFETY (%)

LEGITIMATE SOURCES FIRST

LEGITIMATE FOLLOWED BY INFRINGING

TOP 3 RESULTS
SELECTED

%



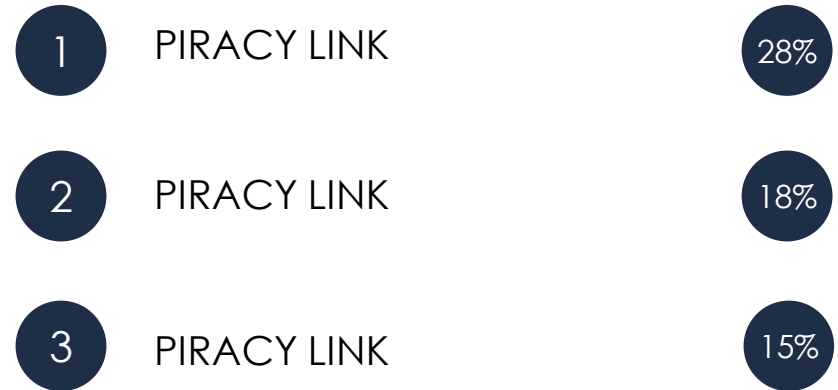
Total selecting a legitimate result **57%**

INFRINGING SOURCES FIRST

INFRINGING FOLLOWED BY MIX OF LEGITIMATE

TOP 3 RESULTS
SELECTED

%



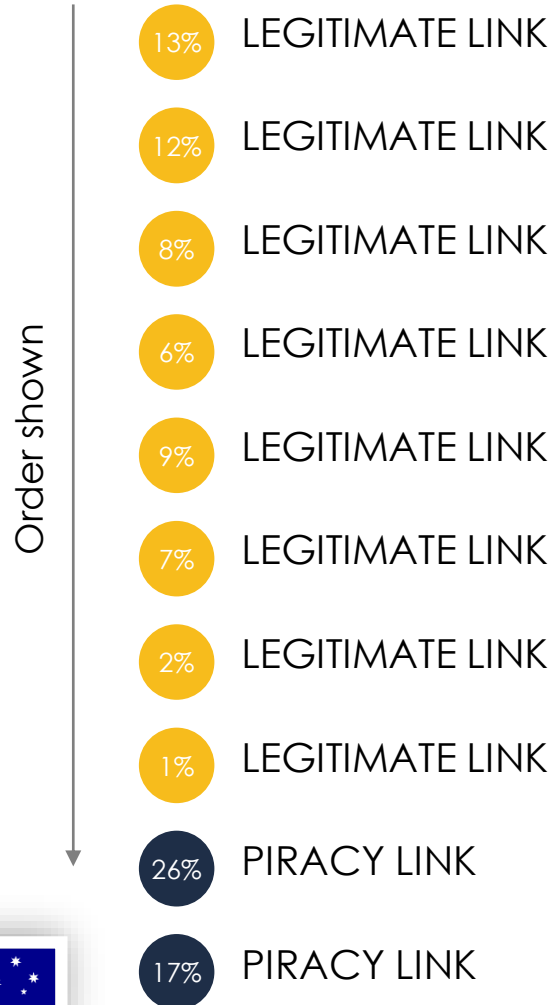
Total selecting a legitimate result **19%**



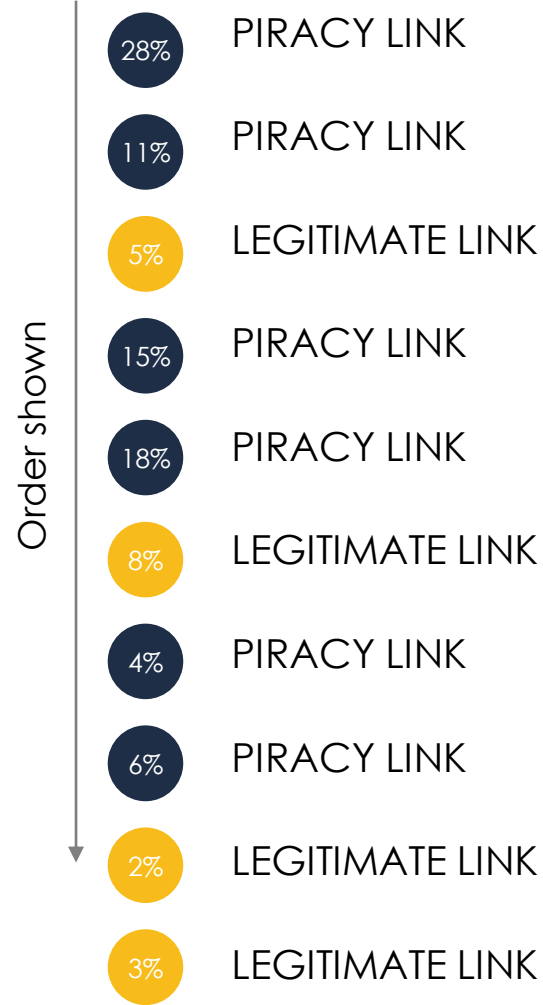
Question: ST7a Imagine that you have just searched online for a TV Show online that you want to watch, which has just been released on Pay TV (or a paid streaming service) you don't subscribe to. We're going to use 'Title E' as an example. The following results have been returned. Which link would you click on first?
Base n=264 / n=261

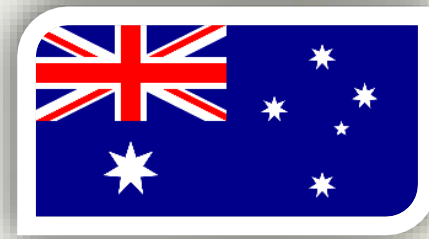
FULL RESULTS SHOW TOP LINKS GET MORE CLICKS BUT SOME SELECTION BETWEEN TOP INFRINGING OPTIONS

LEGITIMATE FOLLOWED BY INFRINGING



INFRINGING FOLLOWED BY MIX OF LEGITIMATE





SEARCH TERMS
MOSTLY GENERIC
BUT EVIDENCE
SUGGESTS
AUTOCOMPLETE
EXACERBATES
PIRACY

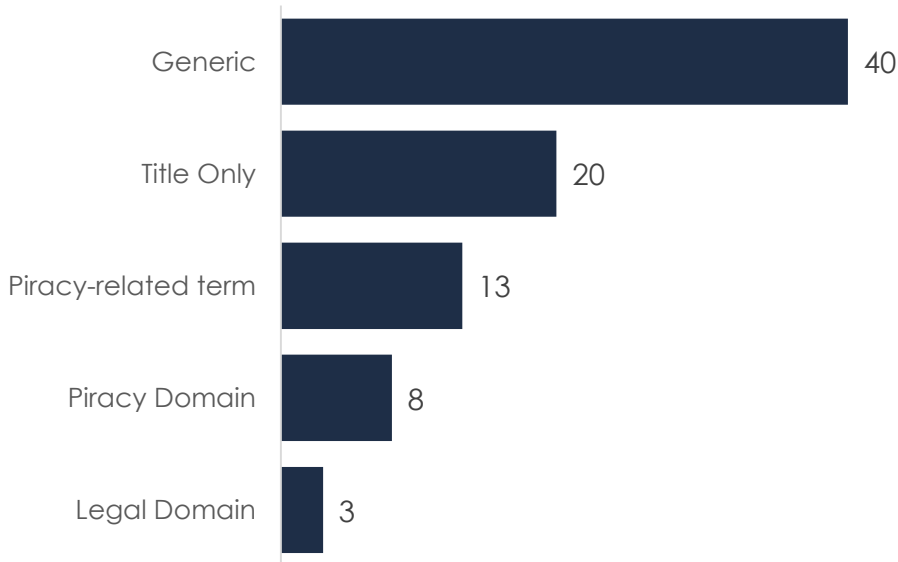
SARI

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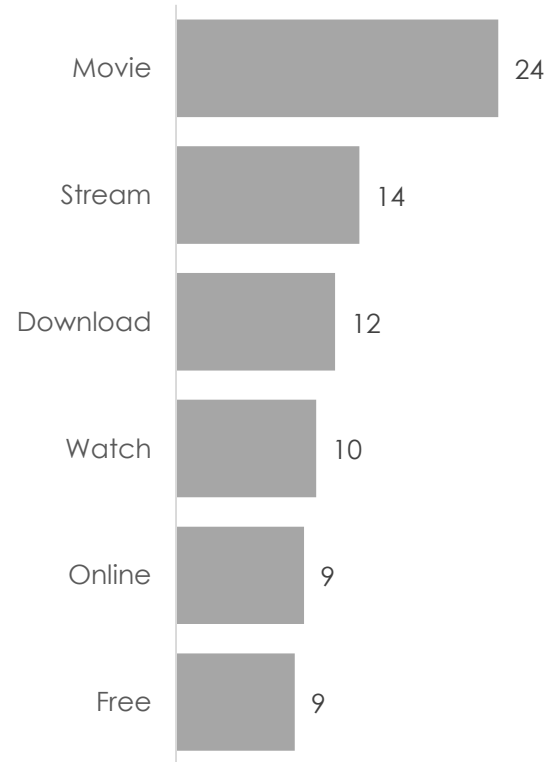
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GENERIC TERMS DOMINATE SEARCH, WITH PIRACY TERMS AND DOMAINS LESS COMMON

**TERMS USED IN LAST SEARCH
(ALL PIRATES)**



TOP GENERIC TERMS USED



Definitions

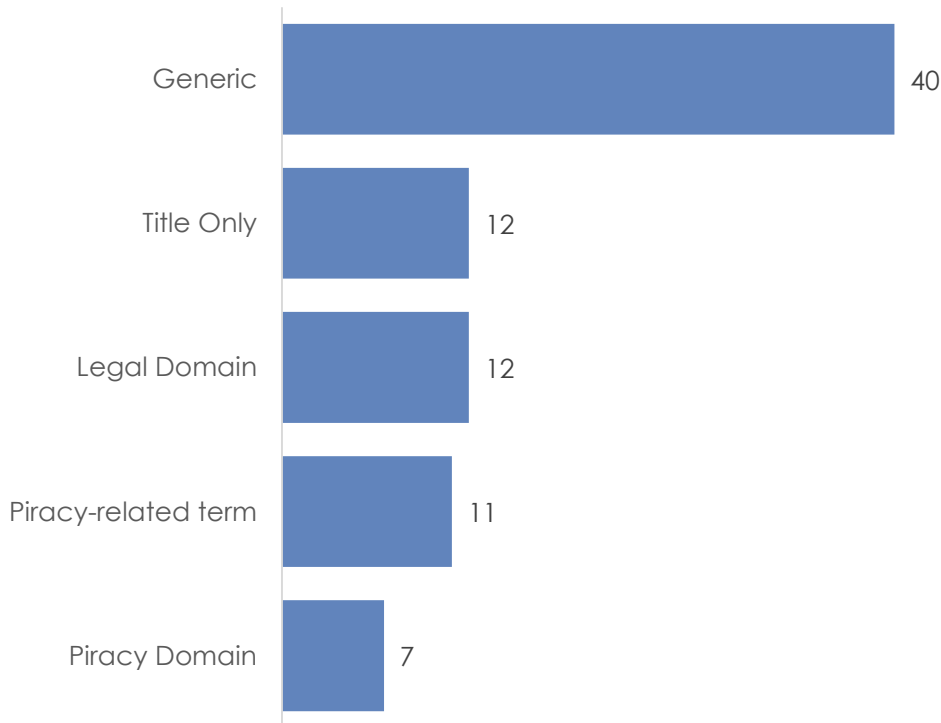
Generic	Neutral, generic terms that DO NOT show clear piracy intent and DO NOT include a domain name (may include content title) Examples: 'movie', 'watch', 'download', 'free', 'stream', 'episode'
Title only	Content title and no other words
Piracy-related term	Terms that conclusively indicate piracy intent: 'torrent', 'free download'. May be combined with content title.
Piracy domain	Name of a domain that hosts exclusively pirated content
Legal domain	Name of a domain that hosts legitimate content, including user-generated content sites



Question: SB4b thinking back to the last movie or TV show you used a search engine to find an pirated/unauthorized copy of online, please tell us, as best you can remember, what search terms you typed in? sb4a What other search terms would you typically include when looking for a piece of unauthorized content online, apart from the title of the movie/TV show and name of a site you know, / Base n= 1001

NEW PIRATES ALSO MOST LIKELY TO USE GENERIC ONLY SEARCH TERMS

**TERMS USED IN LAST SEARCH
(NEW PIRATES)**



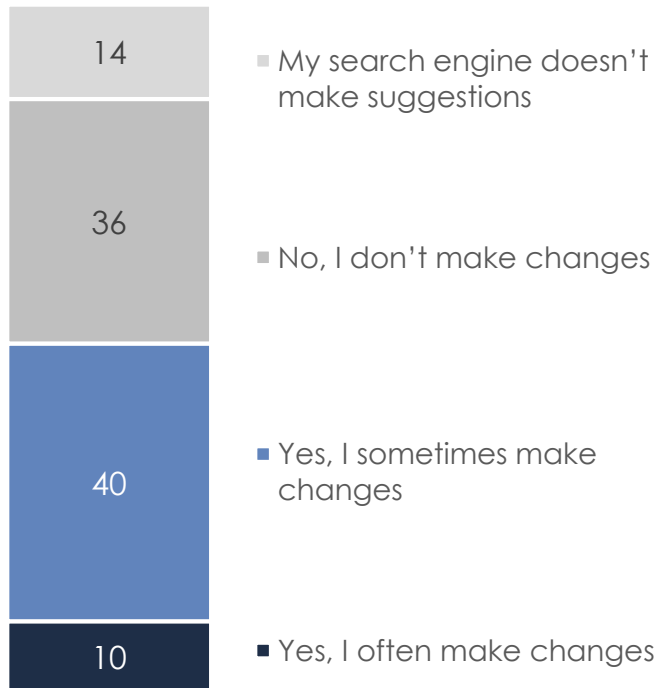
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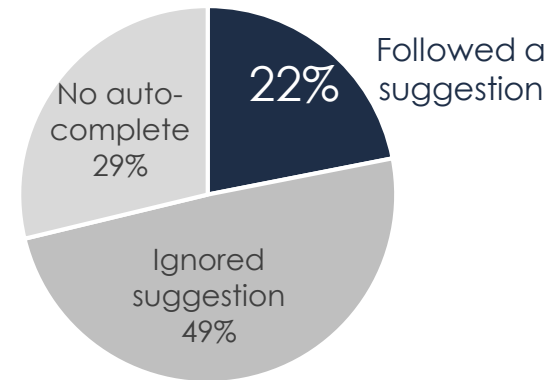
AROUND A FIFTH OF PIRATES FOLLOW AUTOCOMplete SUGGESTIONS TO ADD TERMS COMMONLY USED IN SEARCHES FOR INFRINGING CONTENT

FREQUENCY OF USING AUTOCOMplete SUGGESTIONS WHEN SEARCHING FOR UNAUTHORIZED CONTENT (%)

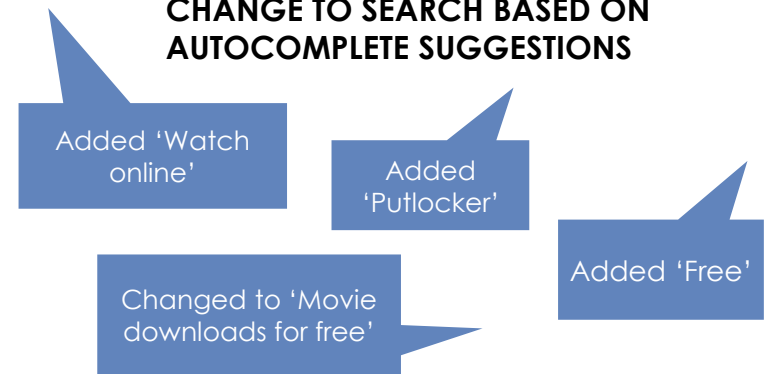


HYPOTHETICAL SCENARIO TEST: IMPACT OF AUTOCOMplete ON SEARCH TERMS

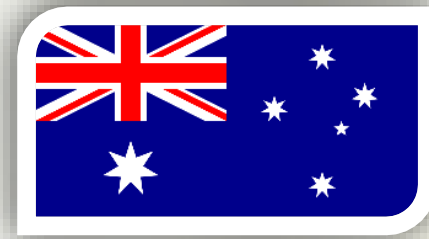
RESPONSE TO AUTOCOMplete



CHANGE TO SEARCH BASED ON AUTOCOMplete SUGGESTIONS



Question: SB5. When you use a search engine to access unauthorized copies of movies or TV shows, do you ever change your search terms based on automatic suggestions that your search engine makes (i.e. does autocomplete ever influence what you type in search)? Base n=1001 / ST2c. Please now open a different browser or browser window and type these terms into a real search engine...When typing in your search terms, did the autocomplete / suggest function change the term you originally planned to search for? Base n=76



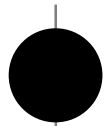
SUMMARY OF
KEY FINDINGS



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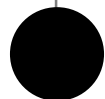
SUMMARY OF KEY FINDINGS



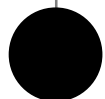
SEARCH IS USED IN **70%** OF CONTENT SOURCE 'DISCOVERIES' AMONG NEW PIRATES



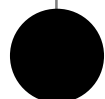
44% OF NEW PIRATES WERE NOT LOOKING FOR INFRINGING CONTENT WHEN THEY CAME ACROSS IT



SITE BLOCKING DETERS AROUND **9%** OF PIRATES – IF EVERYONE SAW A BLOCKED SITE, IT COULD DETER AN ADDITIONAL **14%**



AUTOCOMPLETE AFFECTS AROUND **20%** OF SEARCHES, POTENTIALLY STEERING USERS TO COMMON INFRINGEMENT SEARCH TERMS



57% SELECT A LEGITIMATE SEARCH RESULT WHEN THESE DOMINATE THE 'FIRST PAGE' COMPARED TO **19%** WHEN INFRINGING ONES DO

