



AUSTRALIAN PIRACY BEHAVIOURS AND ATTITUDES

2022 Wave 14 Adults and Wave 9 Teens

Contents

- 1 Piracy overview in 2022
- 2 Consumer behaviour and changes to media landscape
- 3 An increasingly complex pirate experience
- 4 Barriers and bypass
- 5 Increasing instances of cybercrime

Methodology

2022
Wave 14
ADULTS

Online quantitative research

27th Sept 2022 – 30th Sept 2022

- n=1,229 respondents aged 18+
- National coverage



2022
Wave 9
TEENS

Online quantitative research

12th Oct 2022 – 24th Oct 2022

- n=629 respondents aged 12-17
- National coverage
- Up-weighted to ABS data on age, highest level of schooling, sex and area to be representative of total population



Introducing the piracy segments

PERSISTENT PIRATES

Pirate at least once a week

CASUAL PIRATES

Pirate monthly or less often

LAPSED PIRATES

Have pirated in the past but
no longer do so

NON PIRATES

Have never pirated

Demographics

ADULTS



| | | |
|------------|------|--------|
| GENDER | Male | Female |
| PIRATE | 51% | 48% |
| NON-PIRATE | 51% | 49% |



| | | | | | | |
|------------|-------|-------|-------|-------|-------|-----|
| AGE | 18-29 | 30-39 | 40-49 | 50-59 | 60-69 | 70+ |
| PIRATE | 36% | 25% | 16% | 11% | 8% | 3% |
| NON-PIRATE | 12% | 14% | 19% | 20% | 16% | 19% |



| | | | |
|------------------|-----------|---------------------|---------------|
| HOUSEHOLD INCOME | <\$50,000 | \$50,000 - \$89,999 | Over \$90,000 |
| PIRATE | 25% | 22% | 41% |
| NON-PIRATE | 38% | 22% | 26% |



| | | | | | |
|------------|------------------|---------------|----------------|-----------------|------------------|
| EDUCATION | Year 10 or below | HSC / Year 12 | TAFE / Diploma | Bachelor Degree | Post Grad Degree |
| PIRATE | 11% | 25% | 28% | 24% | 9% |
| NON-PIRATE | 27% | 23% | 30% | 15% | 4% |

TEENS



| | | |
|------------|------|--------|
| GENDER | Male | Female |
| PIRATE | 56% | 44% |
| NON-PIRATE | 50% | 50% |



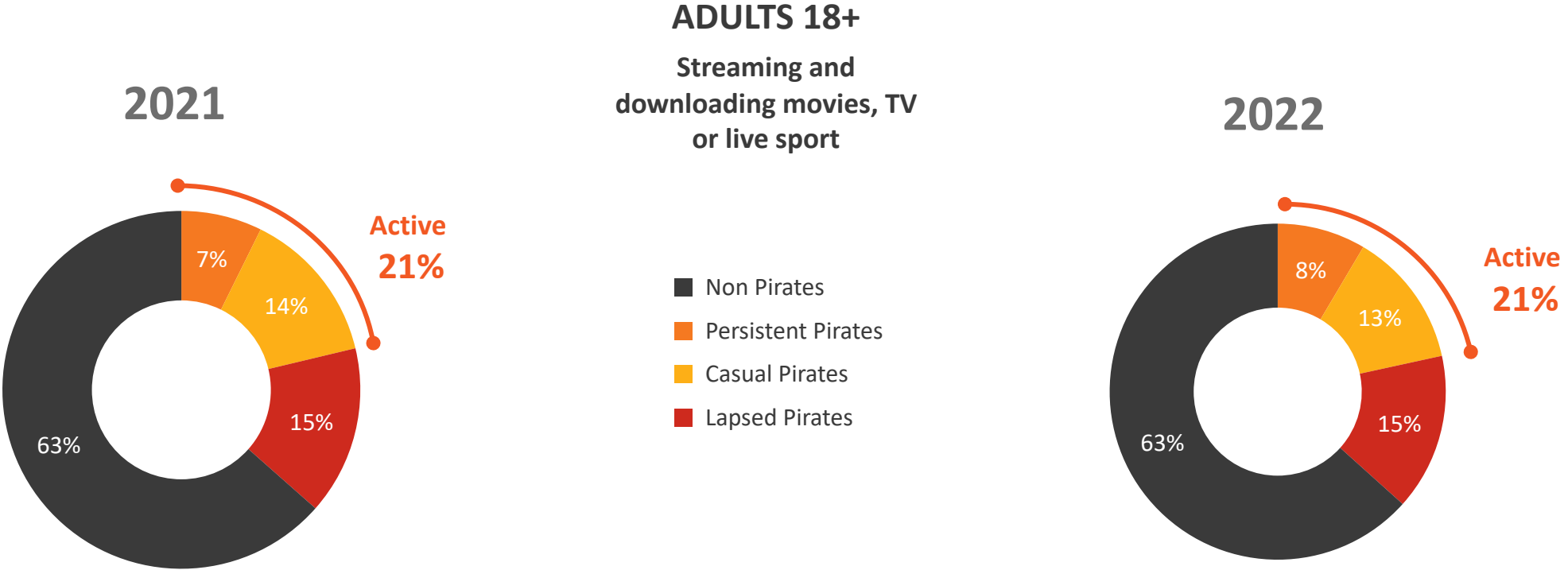
| | | | |
|------------|-------|-------|-------|
| AGE | 12-13 | 14-15 | 16-17 |
| PIRATE | 23% | 39% | 38% |
| NON-PIRATE | 27% | 39% | 34% |



| | | | | | | | |
|-------------|----|-----|-----|-----|-----|-----|-----|
| SCHOOL YEAR | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| PIRATE | 4% | 9% | 18% | 18% | 19% | 21% | 12% |
| NON-PIRATE | 7% | 13% | 15% | 18% | 22% | 14% | 11% |

1. Piracy overview in 2022

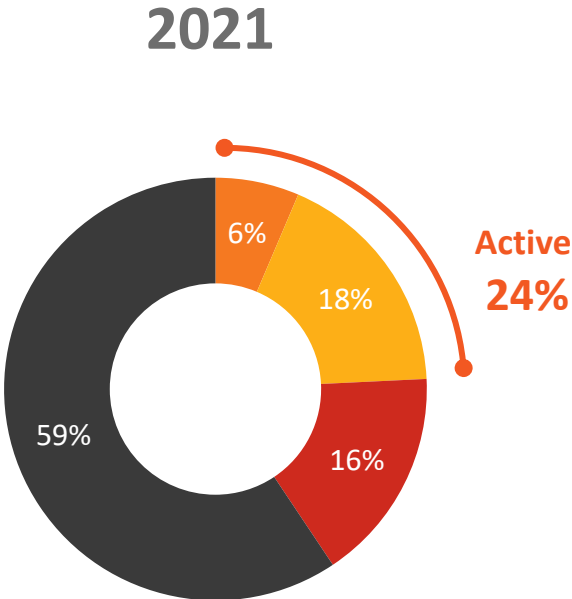
The profile of claimed piracy remains mostly unchanged from 2021 into 2022



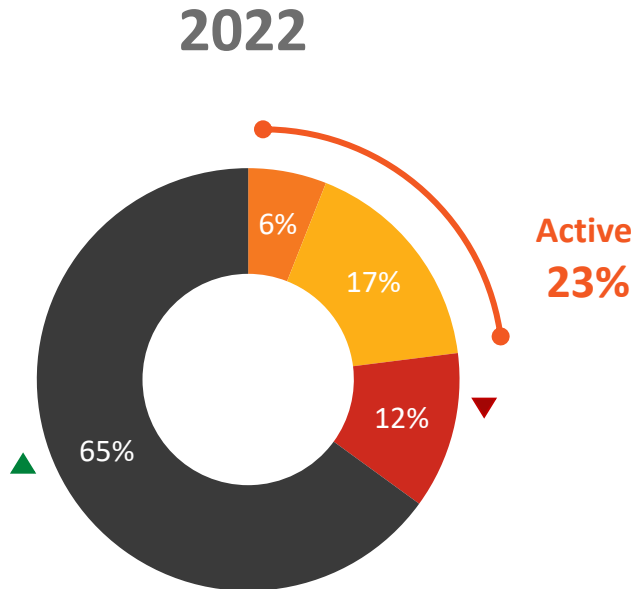
Teens profile shifts away from claimed piracy, with a significant change in lapsed

▲ ▼ Sig. differences +/- vs. 2021 at 95% CI

TEENS 12-17 Streaming and downloading movies, TV or live sport



- Non Pirates
- Persistent Pirates
- Casual Pirates
- Lapsed Pirates

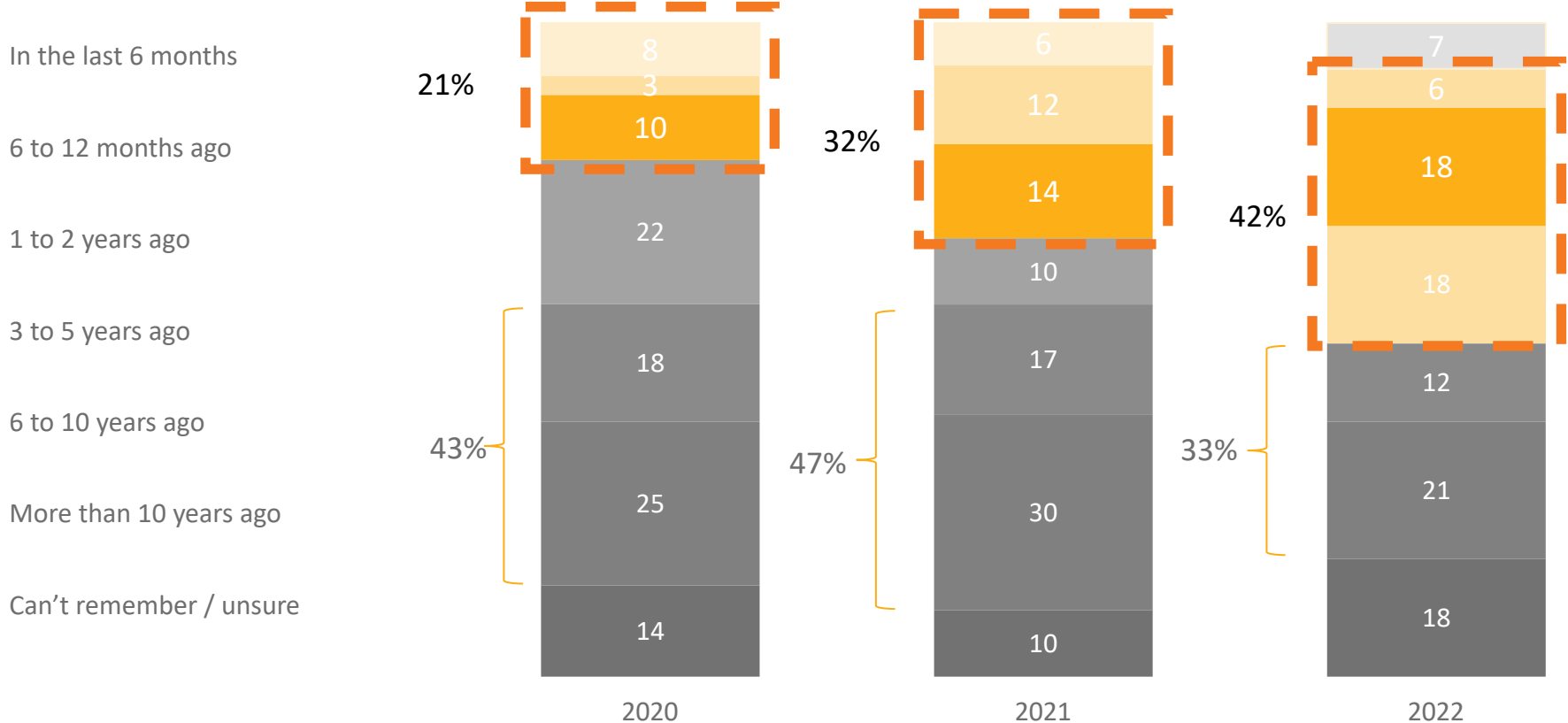


Many pirated for the first time during lockdown, a habit which they have continued

When was the first time you ever accessed pirated content online?

ADULTS

(Persistent Pirates)



*CAUTION Persistent Pirates low base

Availability of content, time and effort required and concerns about viruses are the main reasons many are pirating less

Reasons given by the 44% of adult pirates and 53% of teen pirates who claim they are pirating LESS often

| | TEENS | | ADULTS | |
|---|-------|-------|--------|-------|
| | 2021 | 2022 | 2021 | 2022 |
| I have access to enough content via paid services I subscribe to (e.g. Netflix or Foxtel) and legitimate free services (e.g. ABC iView) | 58% | 59% | 59% | 64% ▲ |
| It takes too much time and effort to find pirated content these days | 19% | 27% ▲ | 26% | 32% ▲ |
| I'm worried about getting viruses on my computer | 32% | 28% | 24% | 34% ▲ |
| I felt bad about pirating | 30% | 30% | 29% | 25% |
| I am concerned about exposing my personal information (e.g. financial details, passwords, photos) when pirating | 27% | 13% ▼ | 16% | 20% |
| Site blocking is making it more difficult to find pirated content online | 10% | 12% | 14% | 16% |
| I'm worried about getting caught pirating | 17% | 21% | 11% | 8% |
| My computer was affected by viruses / malware after visiting pirate sites | 8% | 4% | 6% | 6% |

2. Consumer behaviour and changes to media landscape

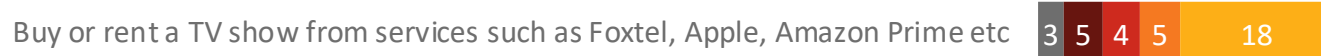
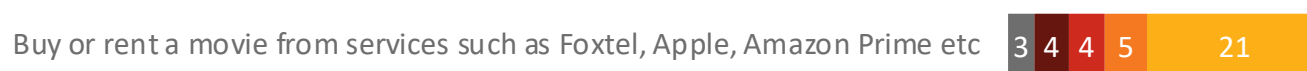
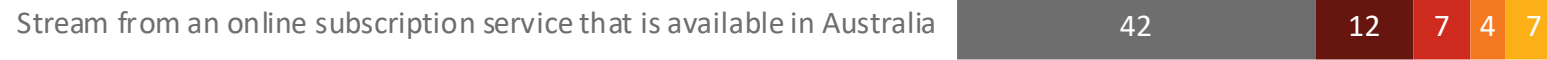
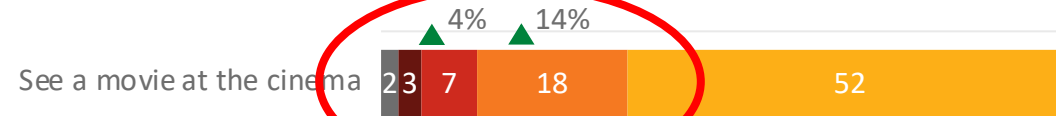
Increases in cinema frequency and pay-per-view reflects the demand of new release content

ADULTS

■ More than once a week ■ Once a week ■ Every 2-3 weeks ■ Once a month ■ Less often

▲ Sig. differences +/- vs. 2021 at 95% CI ▼

2022 2021



37 ▲ 32

35 ▲ 29

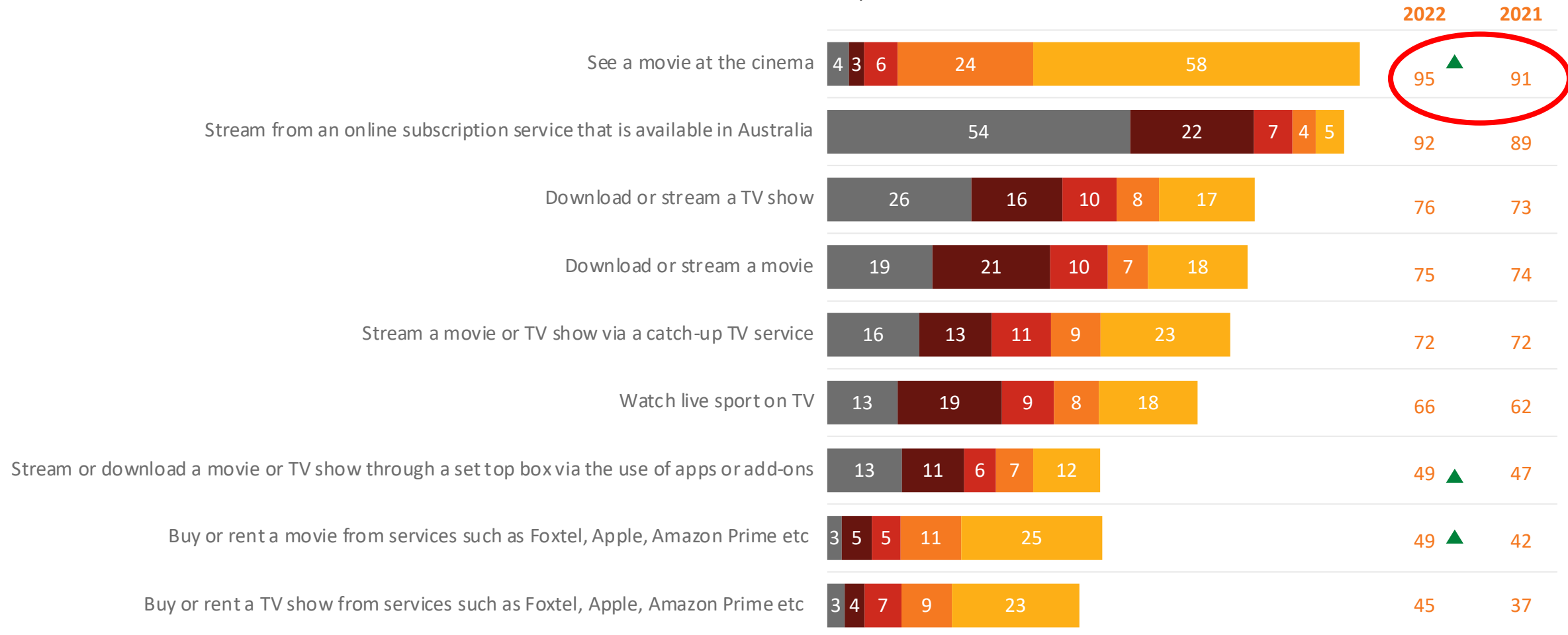
31 37

Teens, in particular, are returning to cinema

TEENS

More than once a week
 Once a week
 Every 2-3 weeks
 Once a month
 Less often

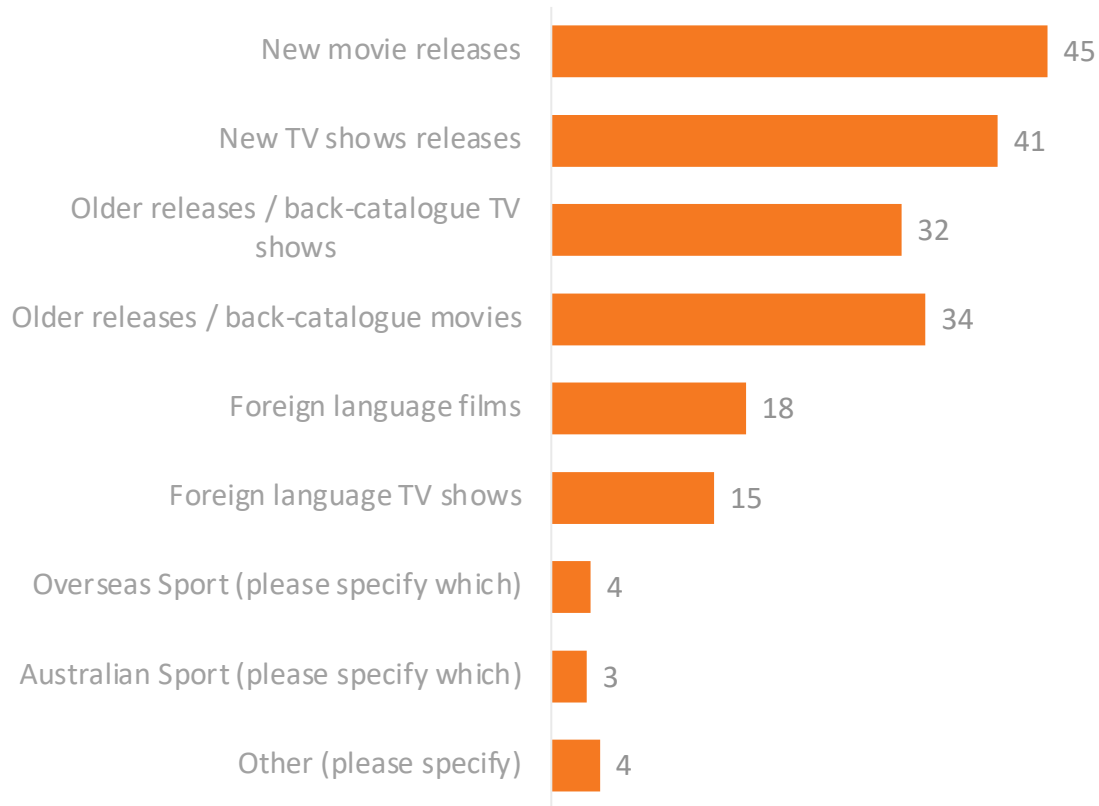
▲ ▼ Sig. differences +/- vs. 2021 at 95% CI



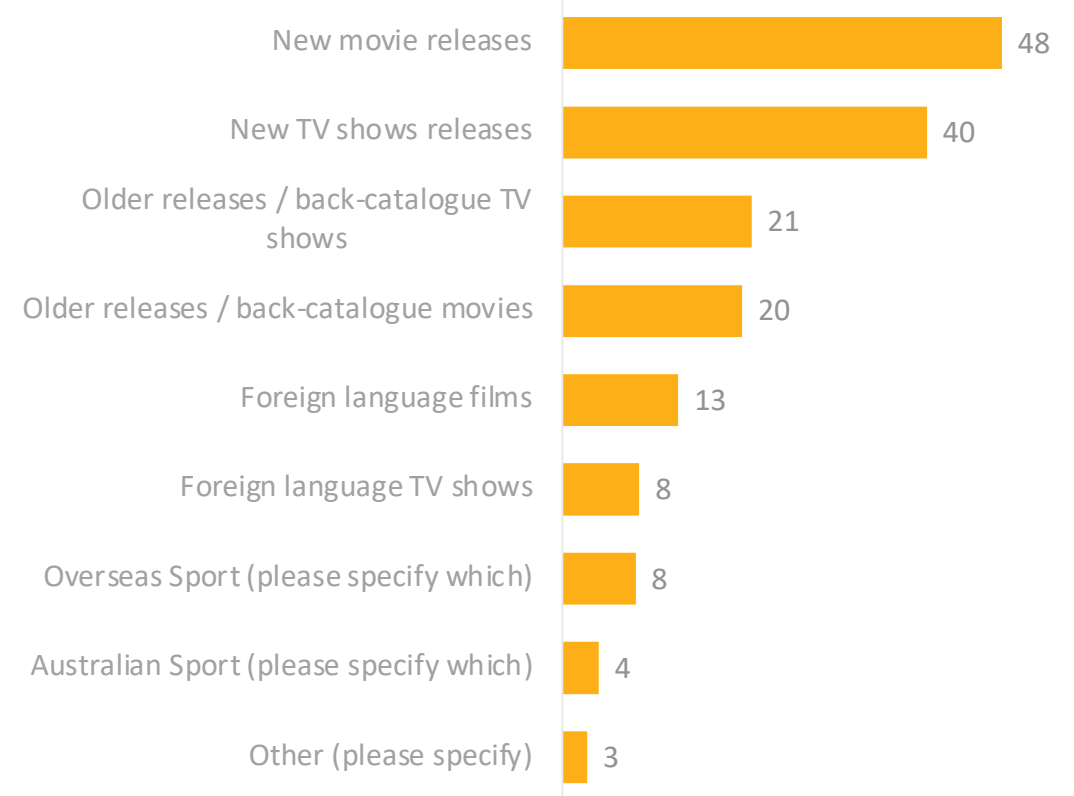
The demand for new releases extends to piracy

Which types of TV programs / movies do you pirate?

ADULTS



TEENS

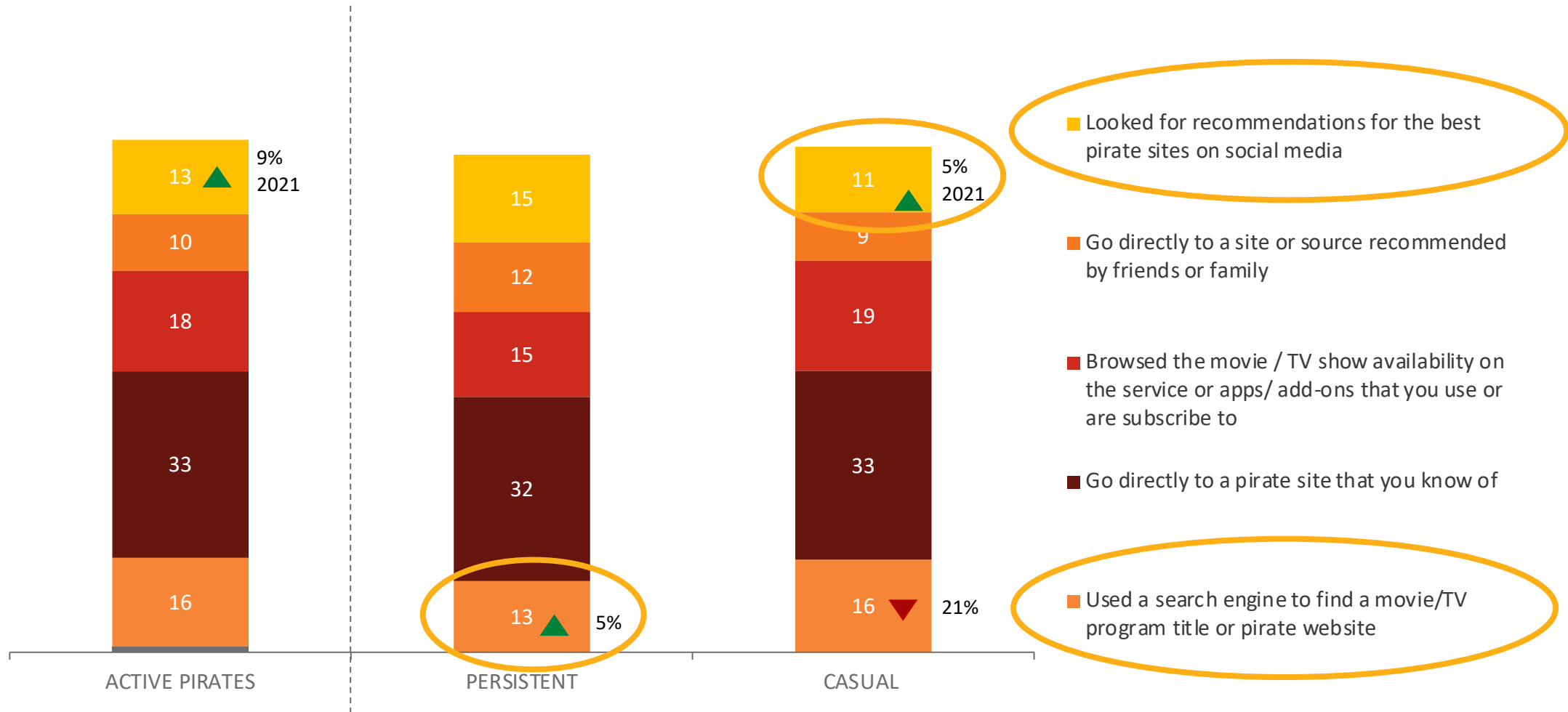


3. An increasingly complex pirate experience

Pirates increasingly find their content via Search and Social Media

When looking for a pirated movies or TV, what is the first thing you usually do?

ADULTS

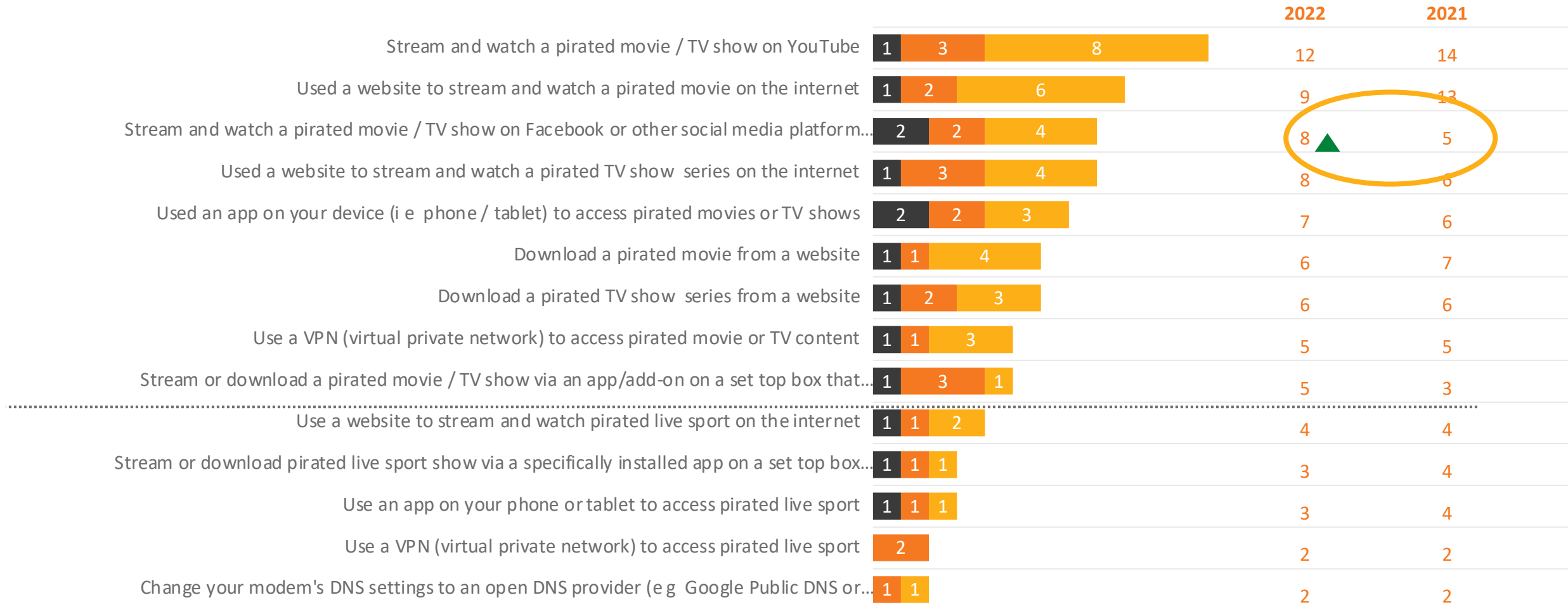


Teens are streaming more on social media platforms

How often you do the following activities?

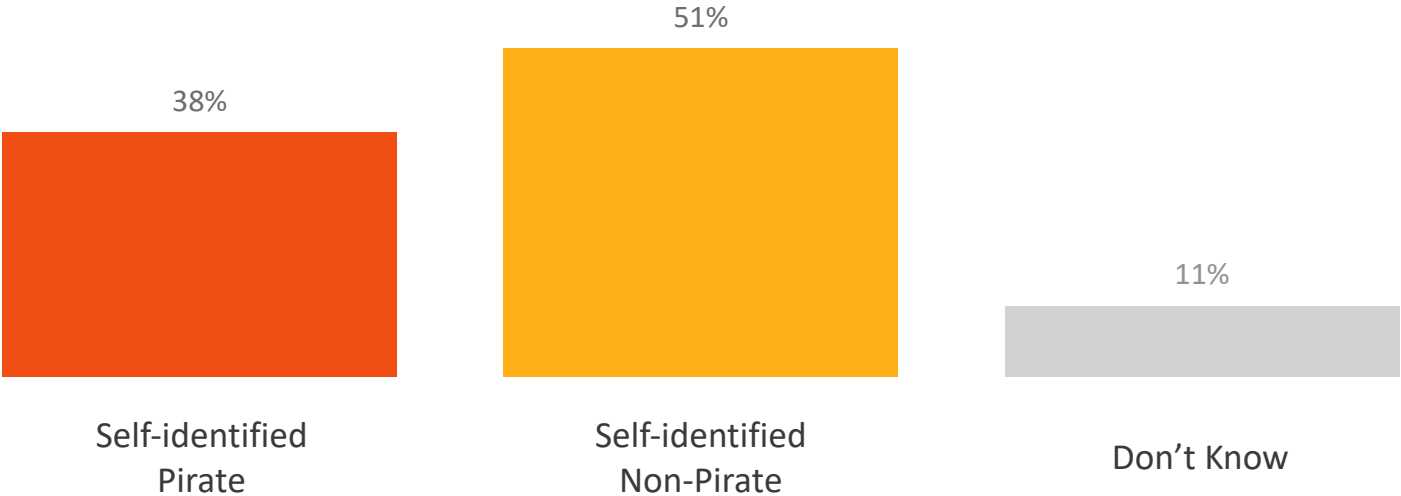
TEENS

■ At least once a week ■ At least once a month ■ Less Often



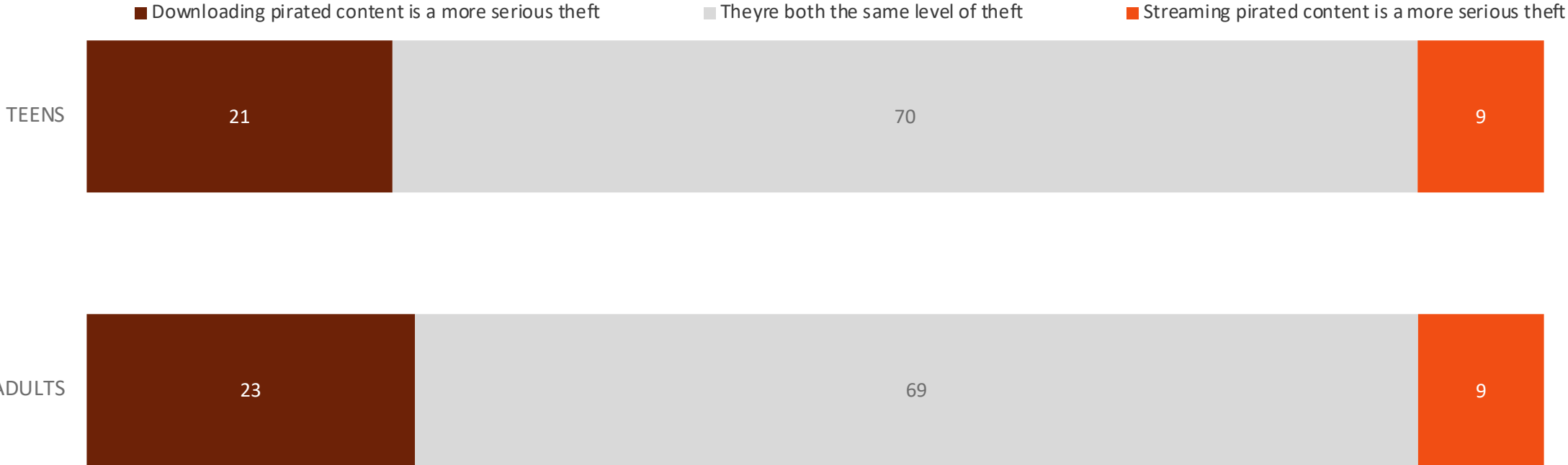
Of those who have streamed on social media, only a third consider themselves to be pirates

I have streamed / watched a pirated movie / TV shows on Facebook or other social media platform



We know that streaming is less likely to be seen as theft compared to downloading

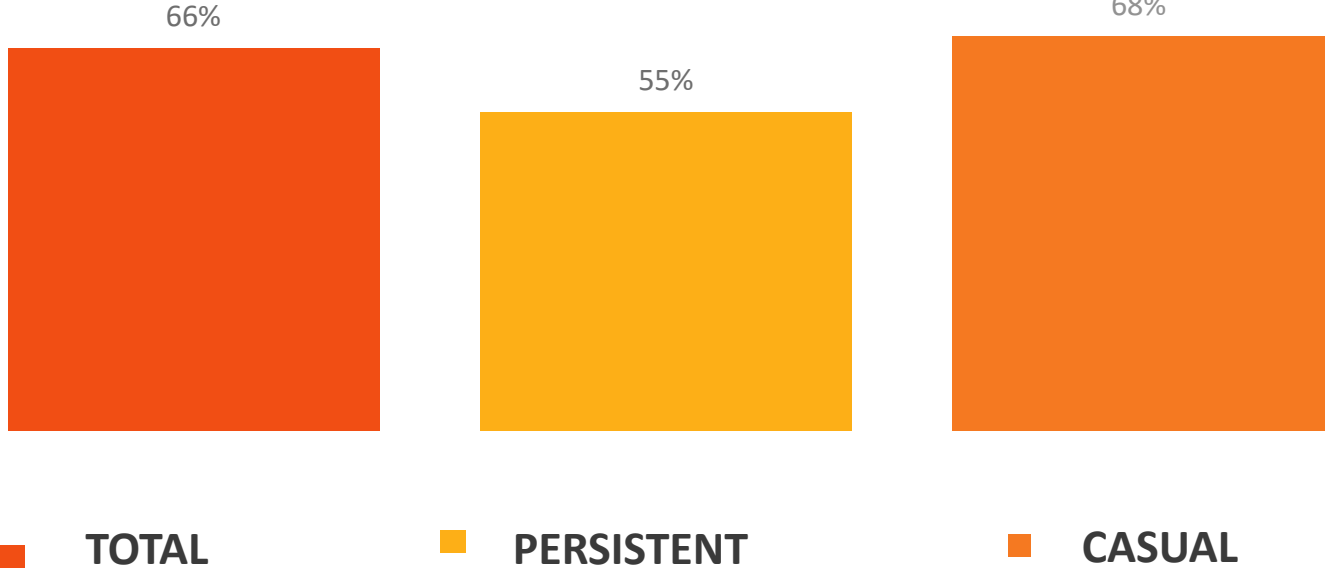
Which method of viewing pirated content would you consider to be a more serious type of stealing / theft, or are they both the same?



The majority think that if they pay for an app it must be legal

ADULTS

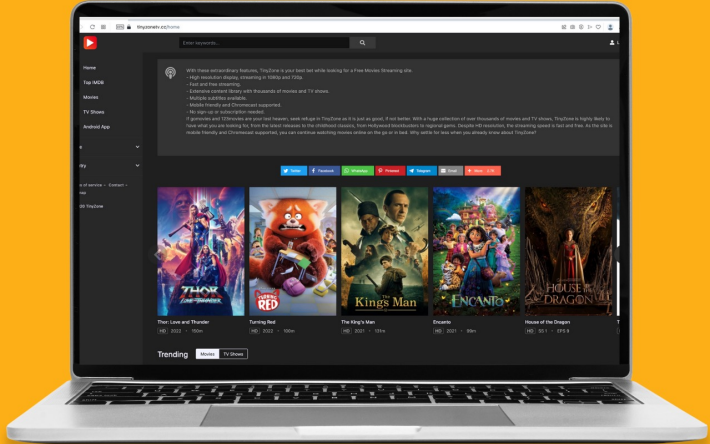
If I'm paying for an app or streaming service it must be legal
(AGREE)



Many pirate sites have slick and professional looking UI's



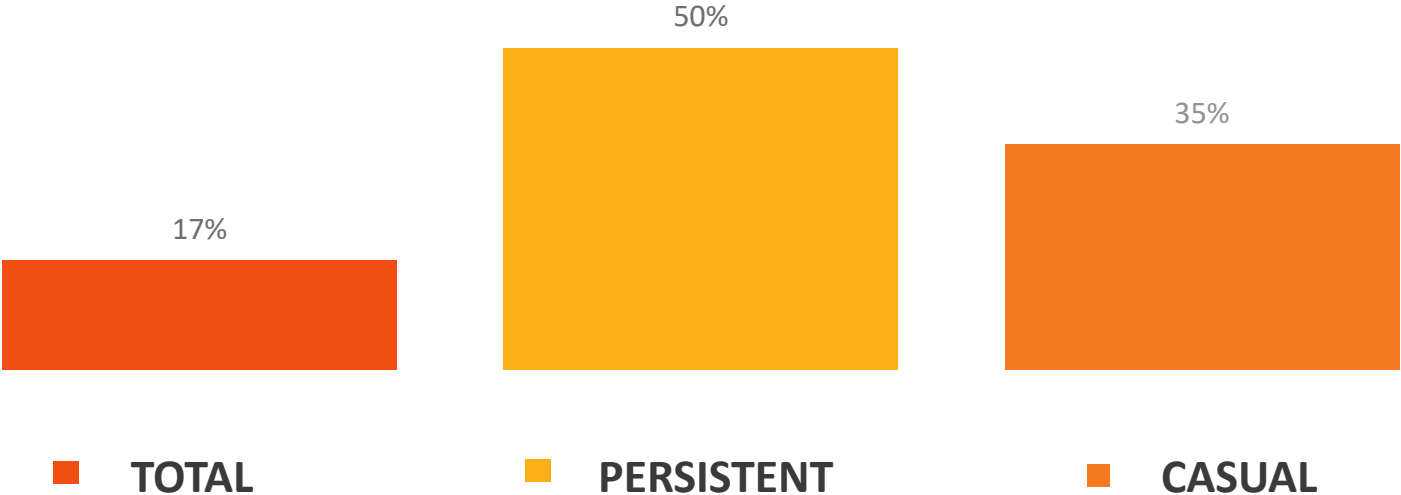
Pirate Site Vs Netflix



Pirates believe if they're paying elsewhere, then they're making their contribution somewhere

ADULTS

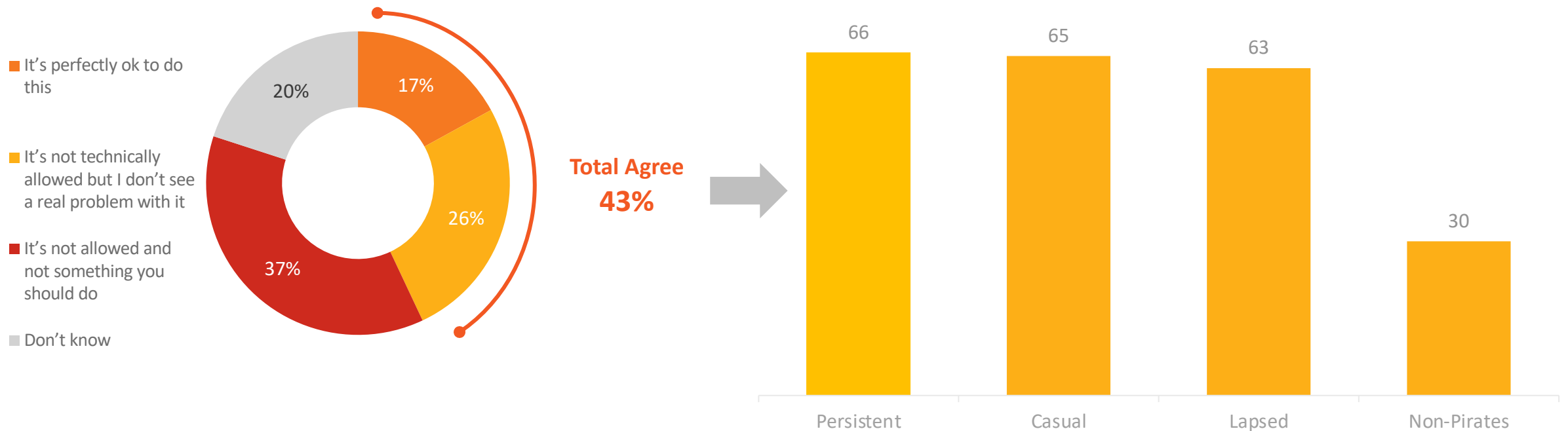
If I'm already paying for legal streaming services then it's okay to access pirated content as well
(AGREE)



Pirates are more likely to be ok with password sharing

ADULTS

Do you think it is okay to share passwords for streaming services with people outside your household?



4. Barriers and bypassing

Half of all pirates were disrupted by siteblocking in 2022, remaining largely consistent over the past five years

Have you ever tried to access a pirated movie or TV show or live sport and found the website blocked?

ADULTS



Returning to Search is the first follow up action

| | |
|------|-----|
| 2022 | 49% |
| 2021 | 47% |
| 2020 | 51% |
| 2019 | 56% |
| 2018 | 46% |

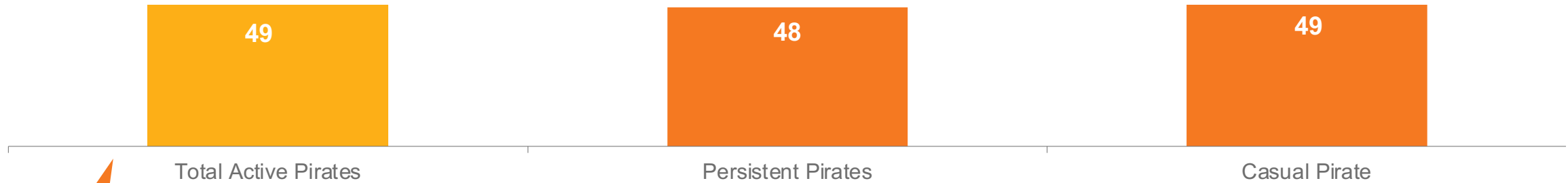
What do you do first when encounter blocked site?

| | 2021 | 2022 |
|--|------|--------------|
| Searched via a search engine for an alternative site to find the same pirated content | 25% | 29% ▲ |
| Given up and done something else instead | 37% | 26% |
| Gone directly to an alternative site you know to find the same pirated content | 19% | 22% |
| Turned to an alternative legal source to access the same content | 13% | 11% |

When facing a blocked site, more and more pirates are changing DNS settings or using VPN

ADULTS

Have you ever tried to access a pirated movie or TV show or live sport and found the website blocked?



Actions taken when you have encountered blocked site

| | 2020 | 2021 | 2022 |
|--|------|------|------|
| Used a VPN to access the blocked website | 24% | 38% | 40% |
| Changed your DNS settings to an open DNS provider either via your browser or modem | 16% | 25% | 25% |

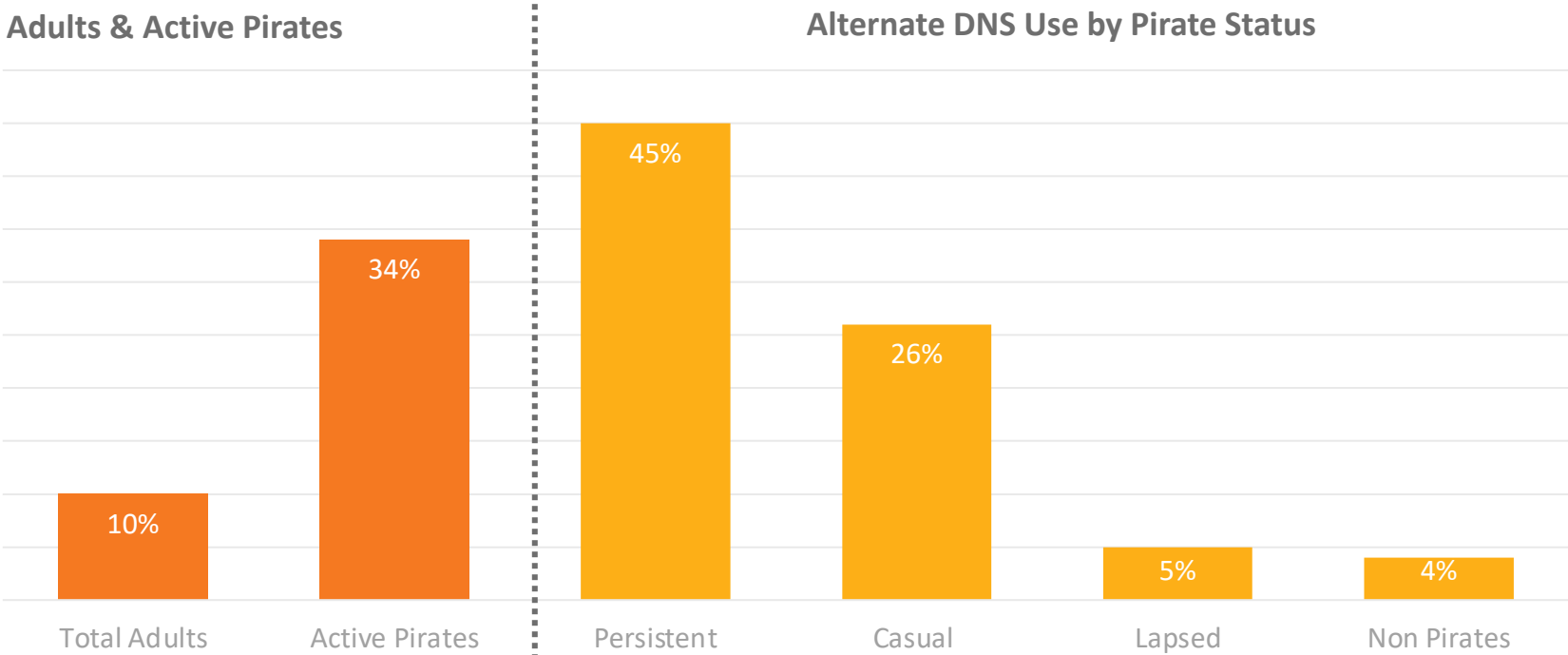
51% of Active Pirates have never come across a site block

Active Pirates are more likely to use an Alternate DNS service than non-pirates

Which of these DNS services, if any, do you use?

Total Adults & Active Pirates

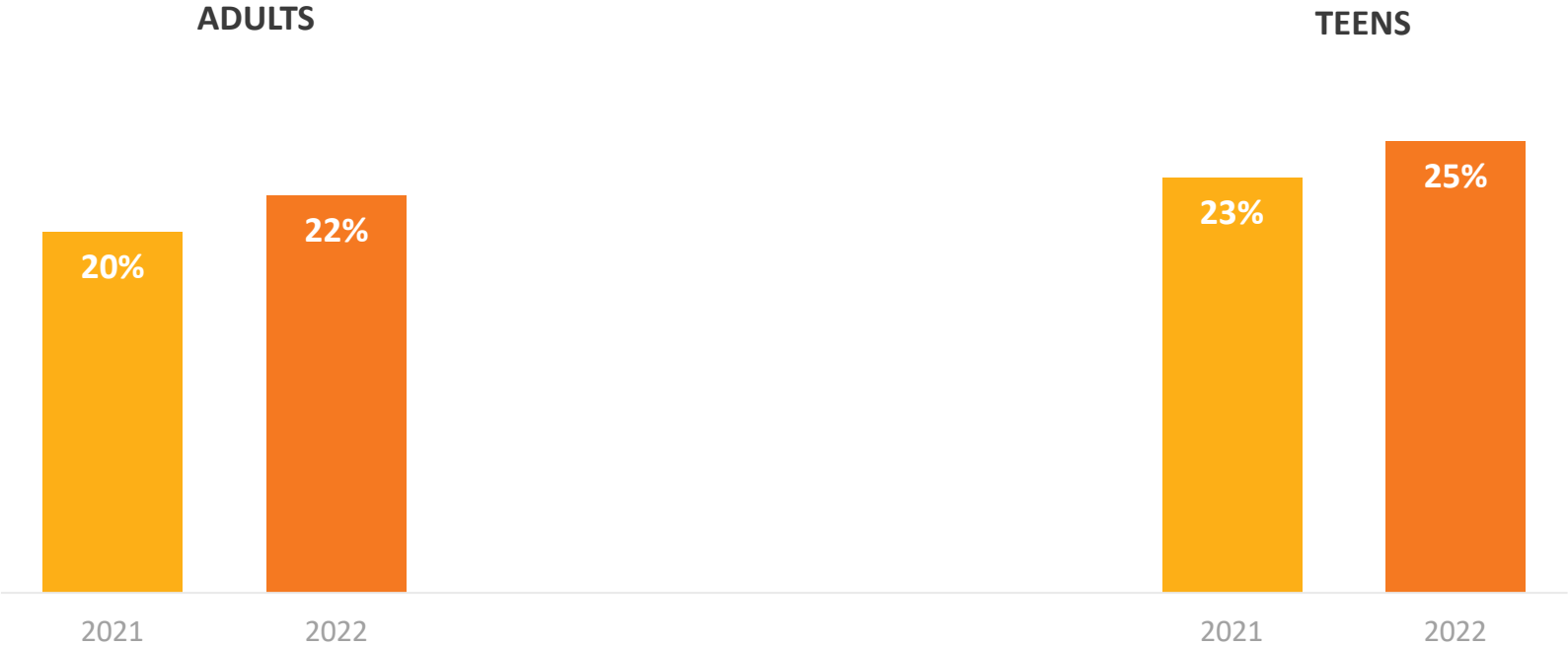
Alternate DNS Use by Pirate Status



29% Google Public DNS
17% Open DNS Home

The amount of people accessing geoblocked content through Alternate DNS reduced in 2021, but stayed consistent this year

How often do you change your DNS settings to an open DNS provider to access geoblocked content?



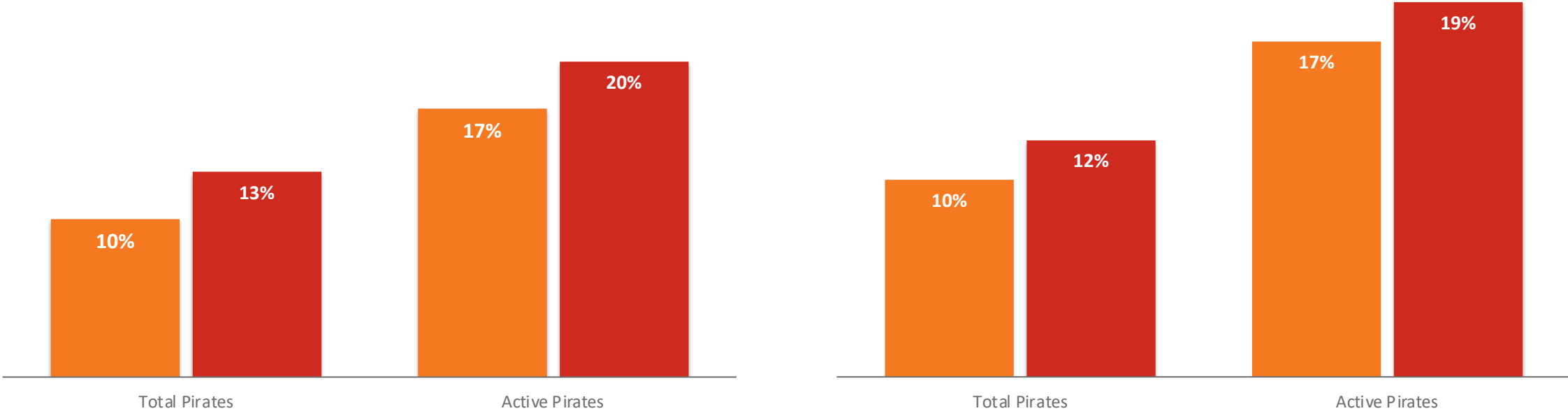
Active pirates are more likely to have changed DNS settings to access pirated content

Changed your DNS settings to an open DNS provider to access pirated content

2021 2022

ADULTS

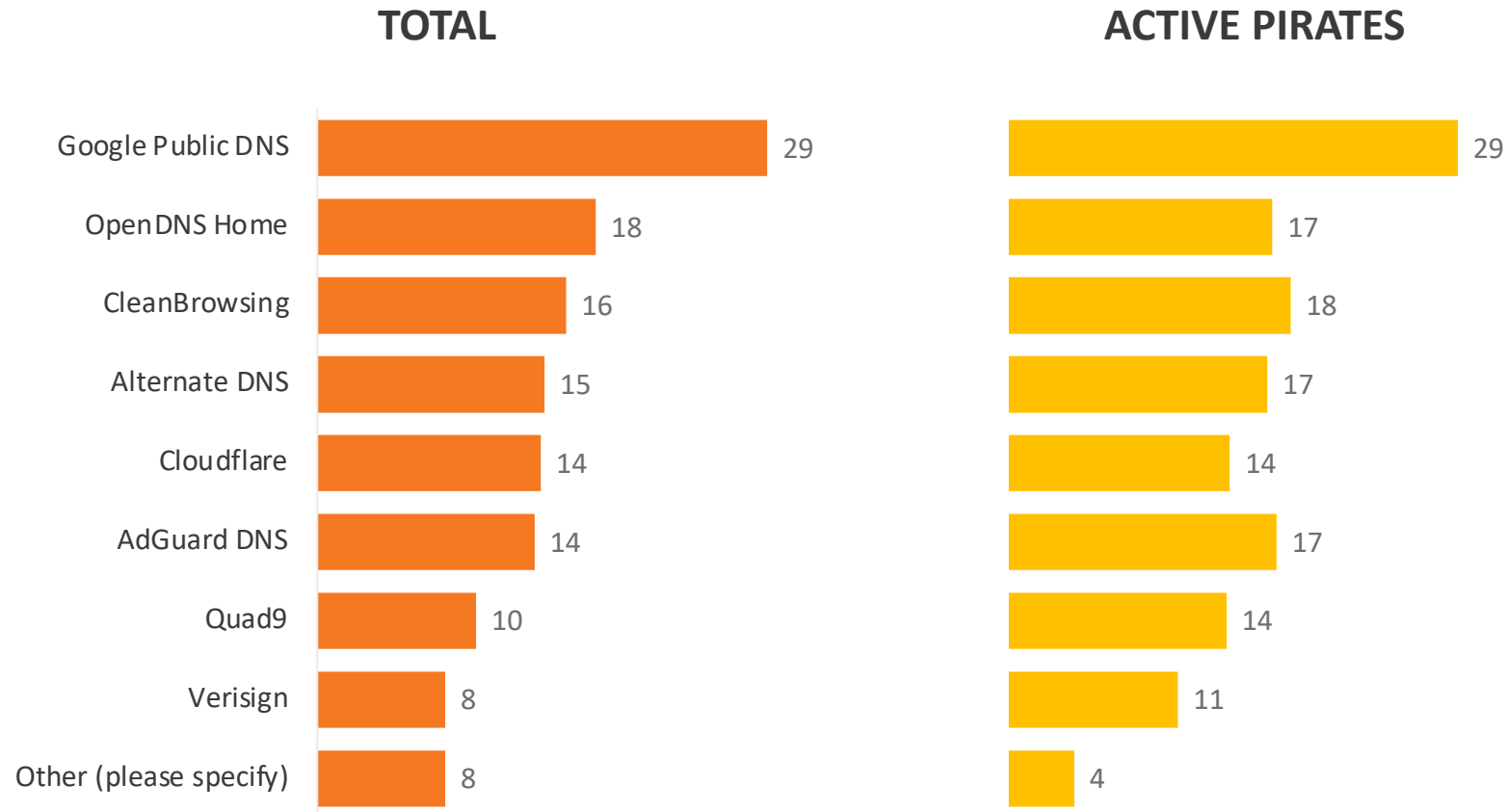
TEENS



Google's Public DNS is the most popular Alternate DNS service

ADULTS

*Which of these DNS services do you use?
(among those who use DNS)*



3. Increasing instances of cybercrime

Recent hacks have put cybercrime on the national agenda

NEWS New task force to target 'scumbag' hackers following Medibank and Optus cyber a

New task force to target 'scumbag' hackers following Medibank and Optus cyber attacks

By defence correspondent Andrew Greene
Posted Sat 12 Nov 2022 at 2:48pm, updated Sun 13 Nov 2022 at 1:25pm



THE AUSTRALIAN

COMMENTARY

Tech-savvy federal police taking fight to cybercriminals

Once upon a time, a stolen TV may have found its way to a pawn shop; today, stolen personal data is for sale on the dark web.

By JUSTINE GOUGH

Politics Federal Cyber warfare

We will hunt them down: O'Neil signals more action on Medibank hack

The Sydney Morning Herald

Reports of cybercrime in Australia jump by 13 per cent in one year

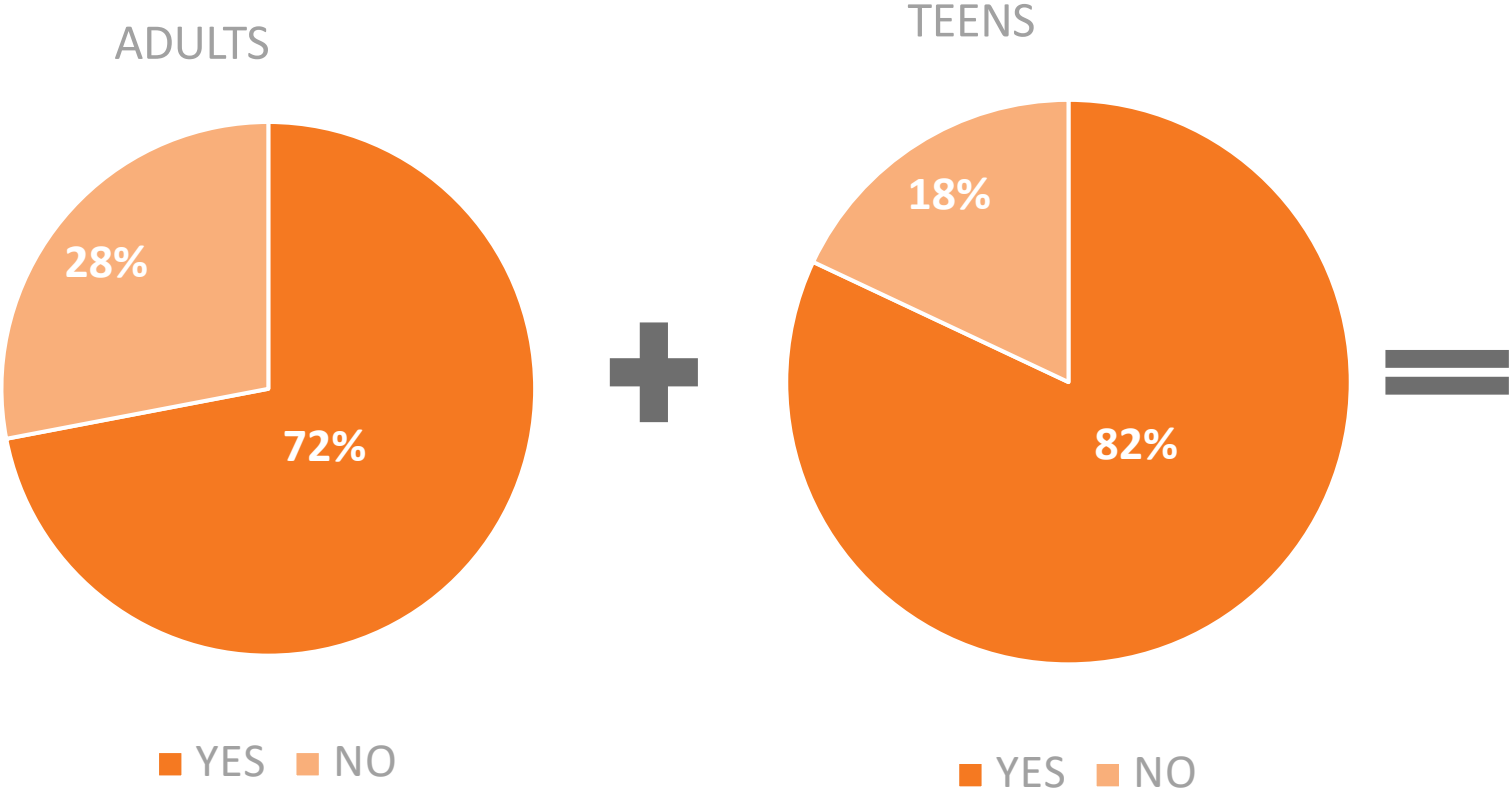
Reports of cybercrime in Australia jump, with one hacking attack reported every seven minutes.

November 4, 2022



The majority of pirates have experienced a cyber security issue while pirating

Have you ever experienced a cyber security issue when pirating?



6,300,000*

Aussies (aged 13+) have experienced cyber security issues while pirating

This includes:

- getting hacked
- becoming a victim of fraud
- losing personal information
- Getting a virus
- Device becoming infected by ransomware or malware

* Extrapolated data based on 2021 Census population figures

We're seeing year-on-year increases in persistent pirates experiencing cyber security issues



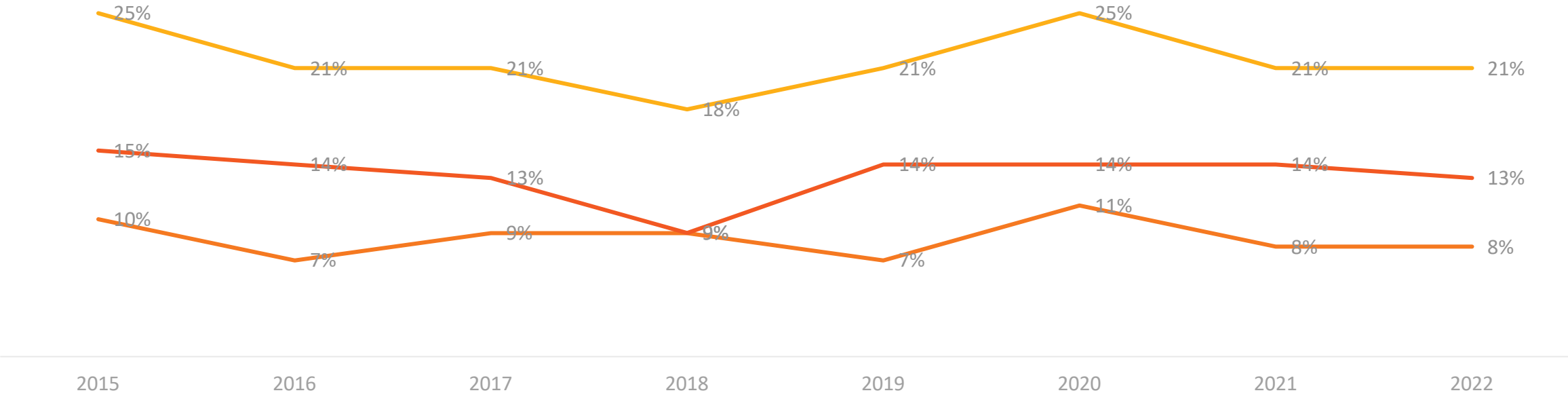


Appendix

Claimed pirate status by year

Claimed Pirate Status By Year

Total pirate Persistent Pirate Casual pirate



Rates of illegal and legal viewing consumption

