

Project Matt

Australian Piracy Behaviours

2015

Wave 7 Adults

Methodology

Online quantitative research

20-24th August 2015

- 1265 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
- Participation anonymous

i. A change in
environment and
participation rates

Since wave 6 – the environment has changed

Copyright Amendment
(Online Infringement)
Bill 2015



High profile activity by
Dallas Buyers Club
LLC



Launch of online
streaming services



Lowering of
subscription fees



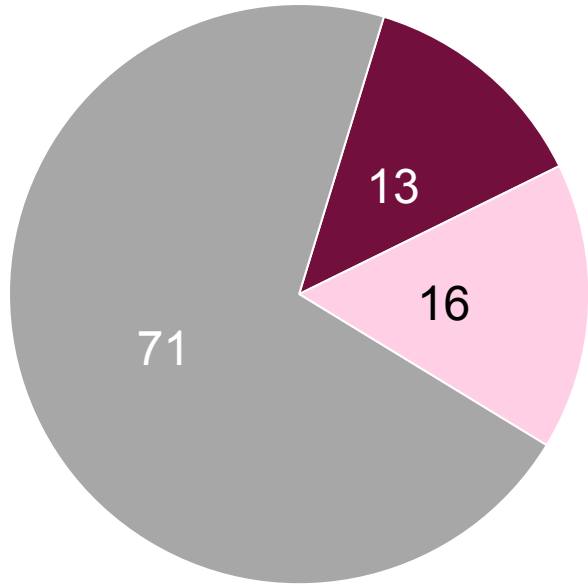
Proposal of warning
letters from ISPS



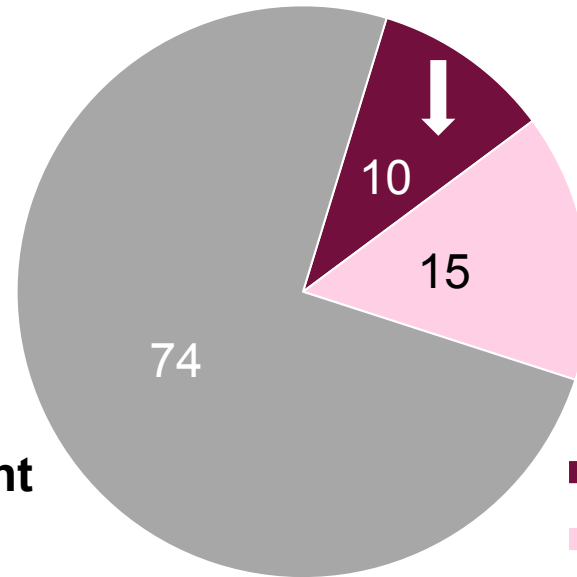
Piracy incidence has fallen

with a decline in the most active segment

Ever done any movie /
TV show piracy
2014



Ever done any movie /
TV show piracy
2015



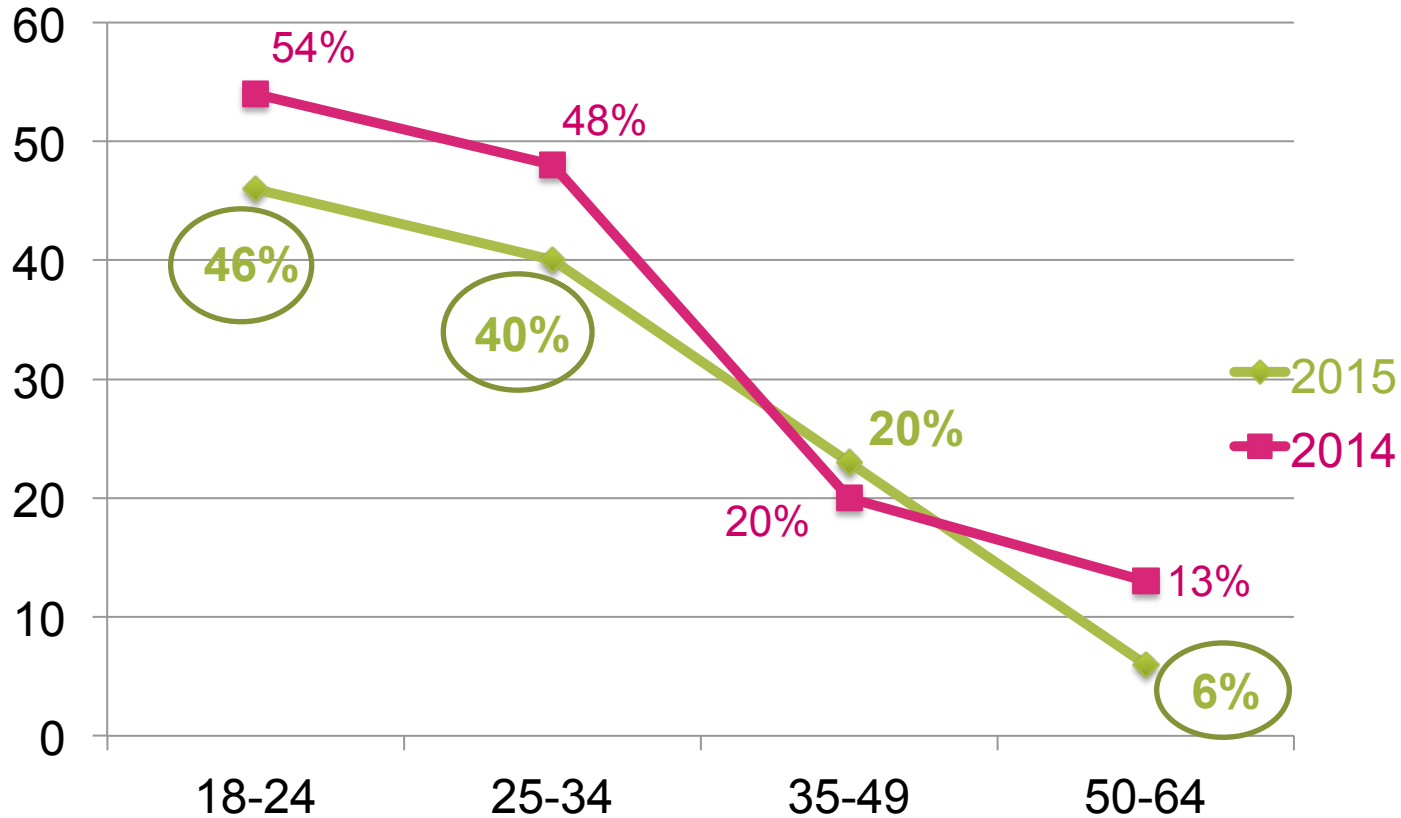
- Persistent
- Casual
- Inactive

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- Inactive

Base: Total sample 2014 N=1189, 2015 N=1265
 ↓ Significant change at the 95% confidence level vs. 2013

Piracy activity by age group has also fallen

Except for the 35-49 age band



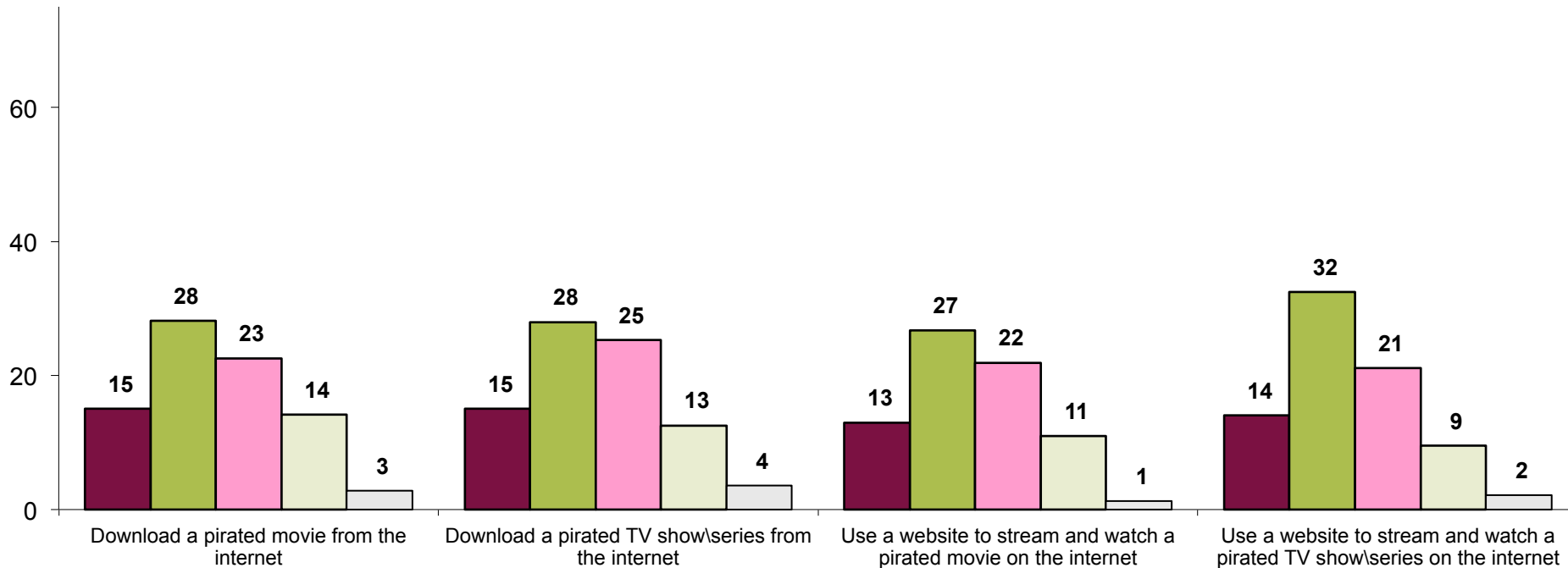
Piracy is no longer the “norm” amongst 18-24 year olds

18-24 year olds are still the most active pirates

They are almost twice as active as the total population

%

Total 18-64
 18-24
 25-34
 35-49
 50-64

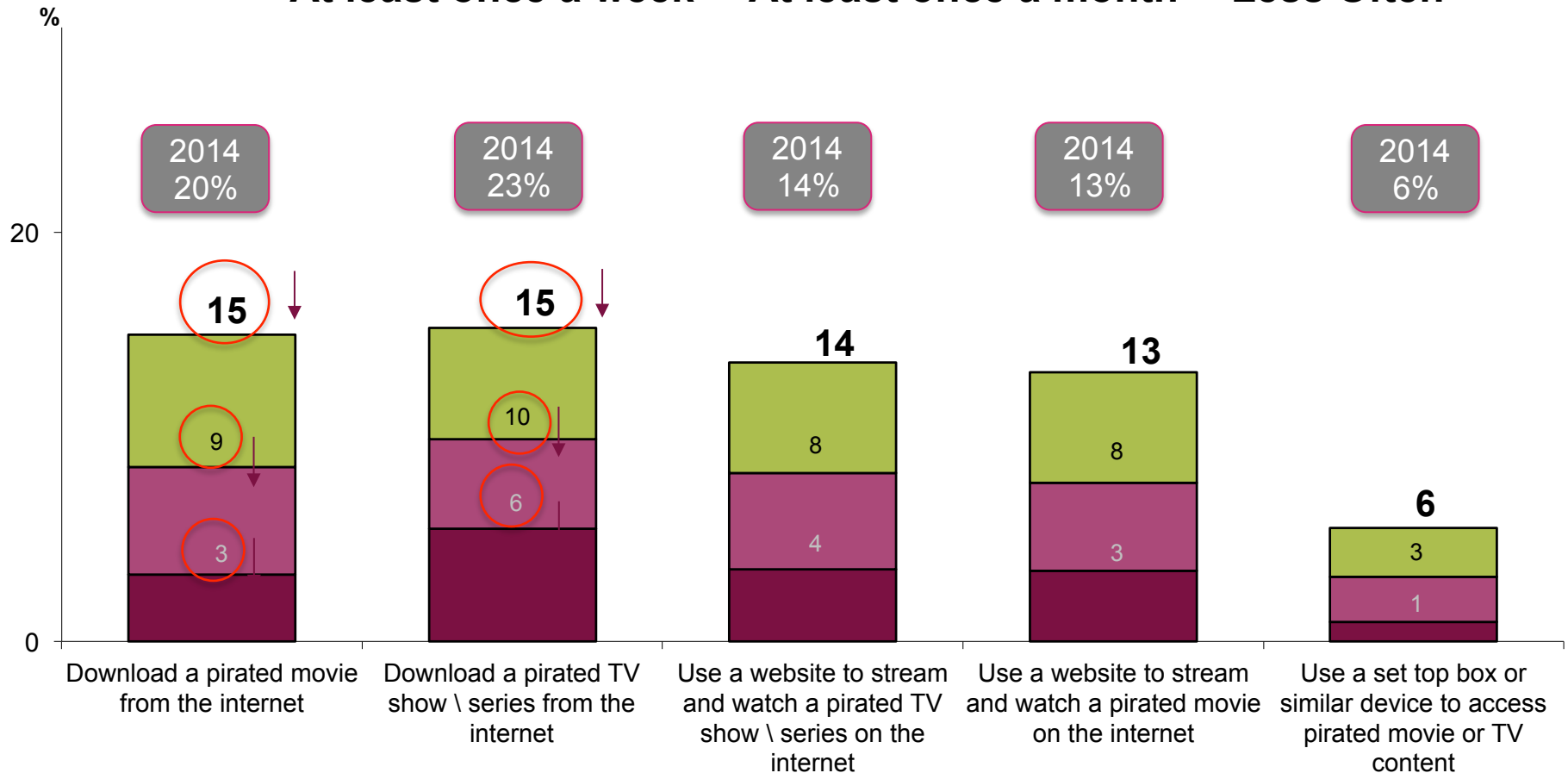


Base: Total sample n=1265. 18-24 n=226; 25-34 n=311; 35-49 n=374; and 50-64 n= 353
 P3. Please indicate how often you do each of these activities (% weekly or monthly or less often)

II. A DECLINE IN CLAIMED FREQUENCY

At a total population level there is a fall in frequency – driven by downloading

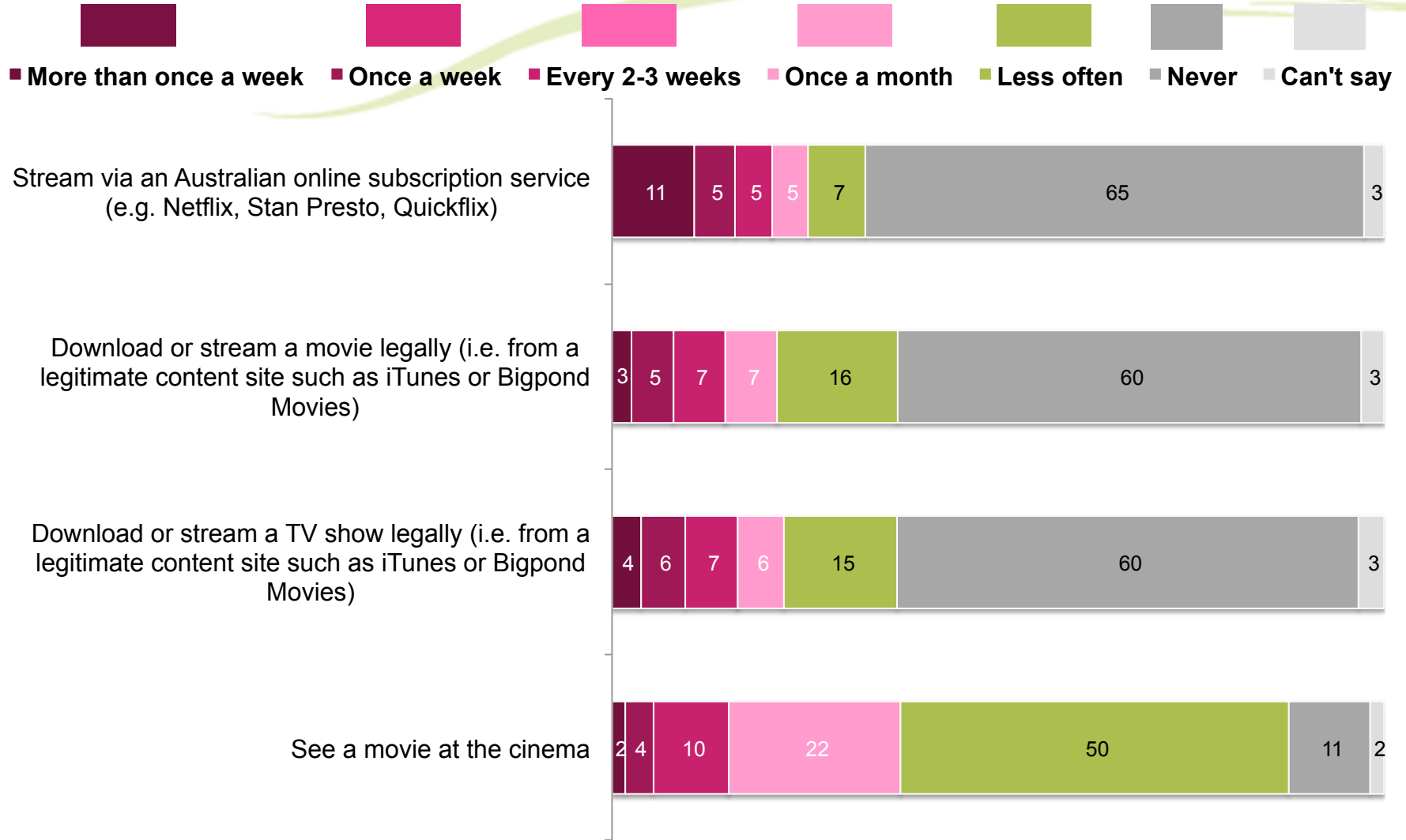
■ At least once a week
 ■ At least once a month
 ■ Less Often



Base: Total sample n=1265. ↓ Significant change at the 95% confidence level vs. 2014 P3. Please indicate how often you do each of these activities.

III. LEGAL VIEWING REMAINS STRONG

Legal viewing remains strong

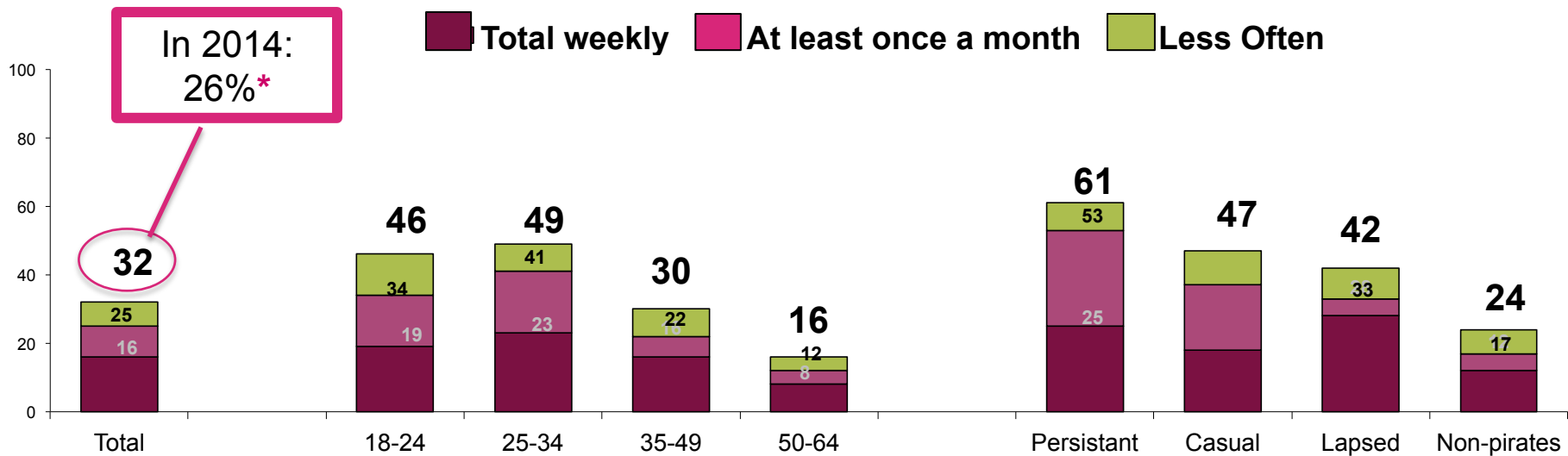


Base: Total sample n=1265

B1. Thinking now about your general viewing of movies and TV shows. Please indicate how often, if ever, you do each of the following.

Streaming via online subscription shows growth

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



72% have heard about the launch of online streaming services in Australia
(Netflix, Stan, Presto) *

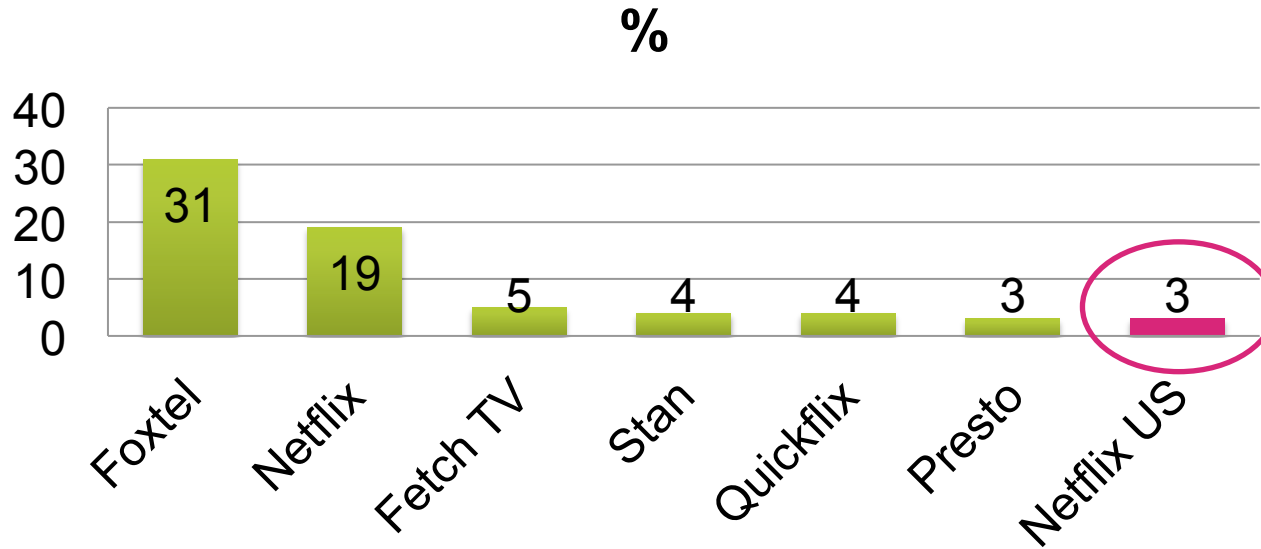
Base: Total sample n=1265; Male n=629; Female n=635; 18-24 n=226; 25-34 n=311; 35-49 n=374; 50-64 n=353; Persistent illegal downloaders n=131; Casual illegal downloaders n=209; Lapsed illegal downloaders n=132; Non-pirates n=792.

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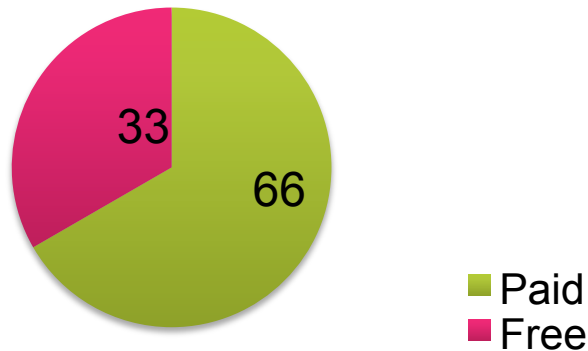
*(NB slightly different question used as new services yet to be launched)

*Second study indicates awareness of the launch of streaming services in Australia in 2015 Base: Total sample n=1230

Whilst Foxtel dominates, Netflix Australia has quickly become established



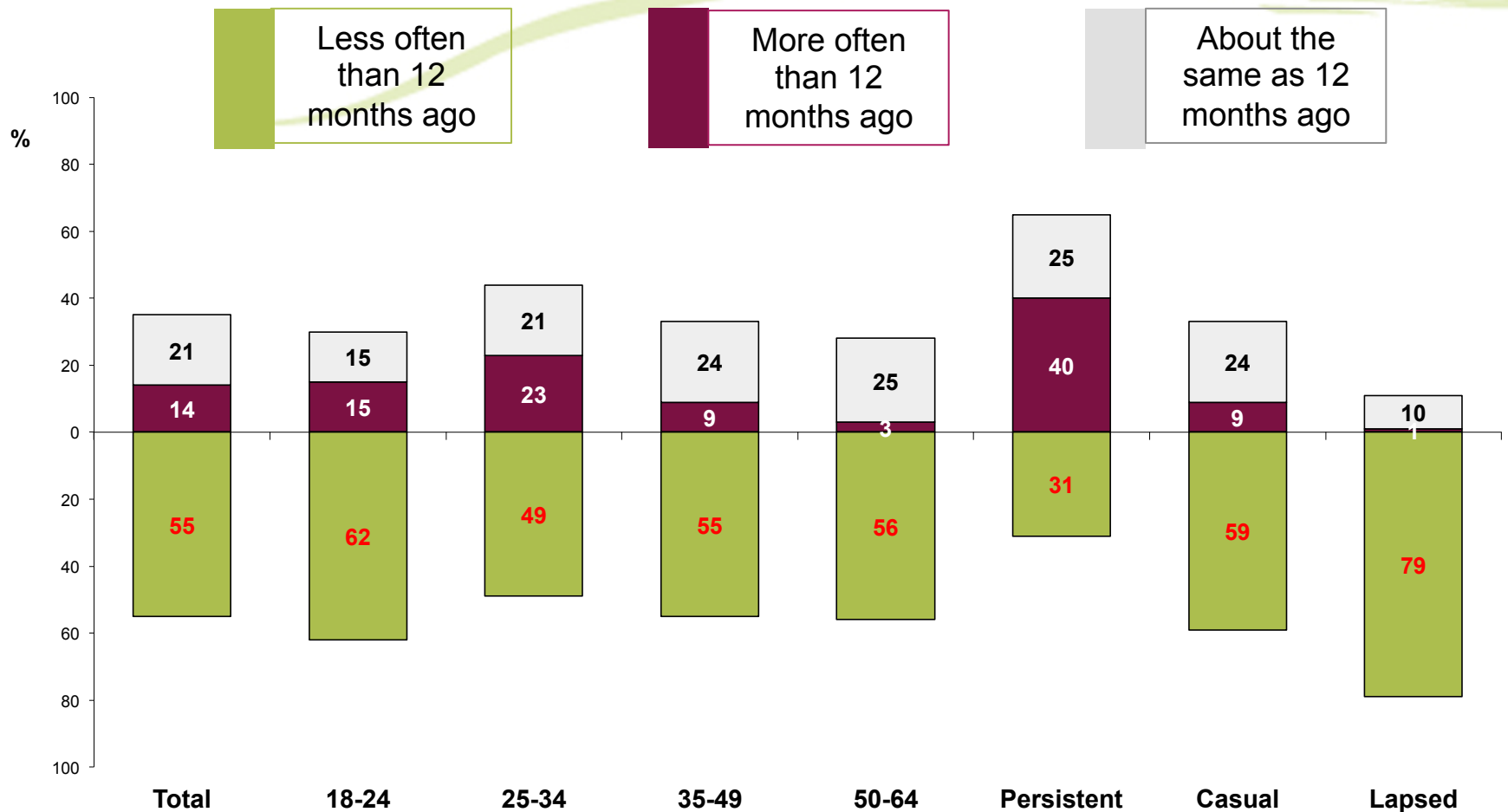
3% of Australians access Netflix in the USA



After the free trial **66%** indicate their intention to pay to continue – the likelihood of a default option suggests this would be higher still

III. PIRATING LESS...AND REASONS WHY?

All but persistent pirates say they are pirating less



Base: Total sample n=1265; Male n=629; Female n=635; 18-24 n=226; 25-34 n=311; 35-49 n=374; 50-64 n=353; Persistent illegal downloaders n=131; Casual illegal downloaders n=209; Lapsed illegal downloaders n=132; Non-pirates n=792.

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

Multiple factors reported as reasons for declining activity

REASON	% TOTAL
Legal alternatives <ul style="list-style-type: none"> • subscribed to a new streaming service • got a free trial to a new streaming service • was able to find the content I wanted online without pirating 	33%
Moral Considerations <ul style="list-style-type: none"> • felt bad about pirating • because piracy is stealing / theft 	21%
Self Interest <ul style="list-style-type: none"> • I'm worried about getting viruses on my computer • I'm worried about getting caught pirating 	16%
I didn't have time to do it anymore	13%
Other reason	13%



Of the 55% who claim they are pirating less often

Those who have pirated are more likely to be aware of anti piracy initiatives

The Copyright Amendment Bill which allows Australian courts to block access to websites that solely profit from pirated movies, TV shows or other pirated content



The warning letters to be sent by internet service providers to customers who have pirated content online



The owners of the movie "Dallas Buyers' Club" seeking compensation from people who have pirated the movie in Australia



■ % yes / heard

Have ever pirated online	Never pirated online
43%	24%
48%	32%
51%	42%

○ Significantly higher among those ever involved in piracy

Base: Total sample N= 1230
P1- In the last 6 months have you heard of?