Consumer survey on online copyright infringement 2018





The survey

This report presents the main findings for the fourth consumer survey of online copyright infringement amongst Australians aged 12+ conducted in 2018.



Survey Period was March 2018 asking respondents about their online activity in the past three months



A total of 2,453 people participated in the survey which was guided by gender, age and state quotas

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Survey objectives

- 1. To understand the prevalence of online copyright infringement in Australia across four content types:

Music





Movies

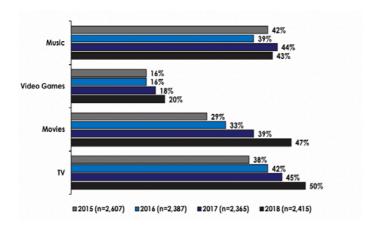


TV programs

- 1. To understand what attitudes drive online copyright infringement behaviours.
- 2. To determine the role pricing plays in lawful and unlawful access of online content.
- To understand how online user behaviour and attitude has changed since the survey first began in 2015 and the emerging trends over the past four years.



Consumption of digital content



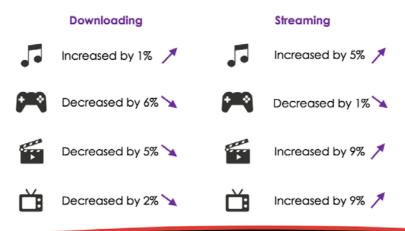
The figure shows the percentage of survey participants that reported consuming each type of content over the last four years. In 2018, 43% consumed music, 20% consumed video games, 47% consumed movies and 50% consumed TV program in the last three months.

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Frequency of consuming digital content on a weekly basis

Survey results from 2018 compared to 2017 for downloading and streaming.





Services used to consume digital content.

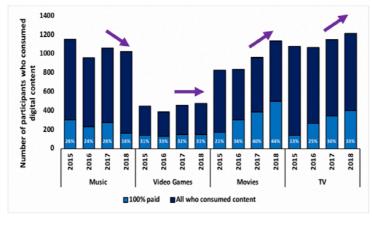
Purple text indicates the largest growth in 2018 when compared to 2017.



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Percentage of consumers who paid for all of their content



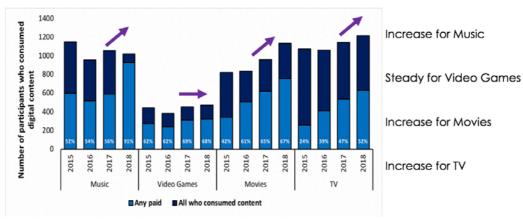
Decreasing for music

Relatively stable for video games

Increasing for Movies and TV



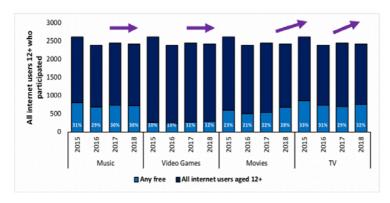
Consumers who paid for some digital content



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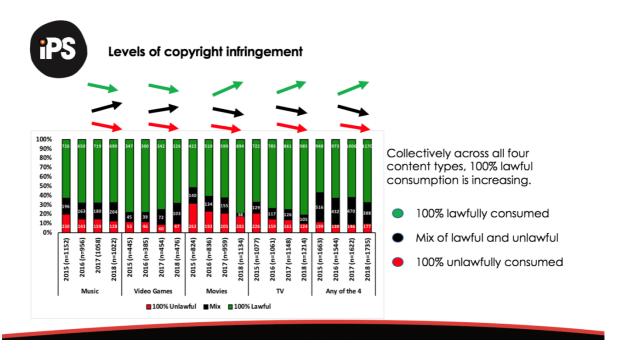


Proportion of participants who consumed any digital content for free compared to all who participated in the survey.



When compared to 2017, results from 2018 showed that music remained steady at 30% and Video Games remained mostly steady at 12%.

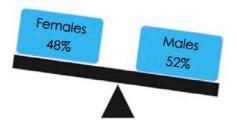
Movies increased by 6% up to 28% and TV showed a slight increase of 3% up to 32%.



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Gender proportion of consumers who have consumed any content unlawfully

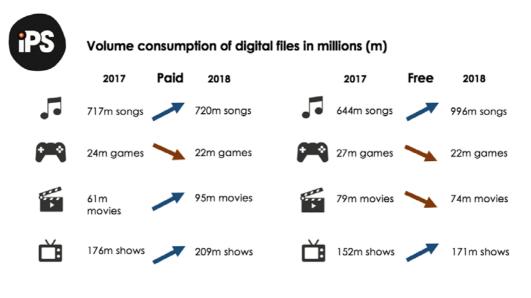


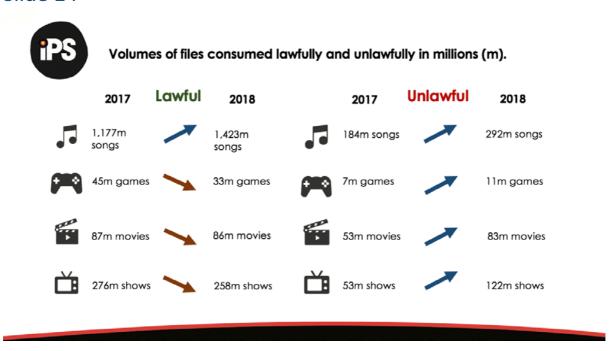


Profile of participants who have consumed any digital content unlawfully

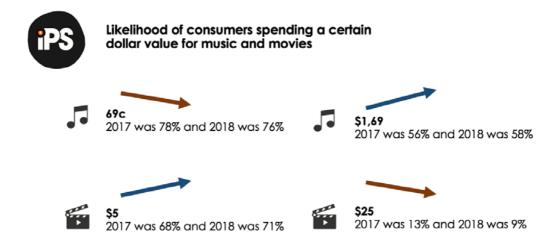
49% of those who unlawfully access digital content are 34 years old or younger.















Reasons why participants consume digital content unlawfully.

- 44% It's free
- 38% It's easy
- 31% It's quick

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What would make infringers stop

- 26% If lawful services were cheaper
- 23% If it was clearer what is lawful and what isn't lawful
- 6% Nothing would make me stop



How would participants react if they encountered a blocked site

- 57% Simply give up
- 34% Seek alternative lawful access
- 7% Bypass the blocked site

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At least 50% of respondents were aware of each of these lawful or licensed online services.

YouTube

Netflix Foxtel

iTunes Spotify

Stan



Terms participants use to determine what is a lawful digital content site.



