Consumer Survey on Online Copyright Infringement 2021

Survey Findings Report

Commissioned by the Australian Government Department of Infrastructure, Transport, Regional Development and Communications

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ORIMA RESEARCH

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This project was conducted in accordance with the international quality standards ISO 20252 and ISO 27001 as well as the Australian Privacy Principles contained in the Privacy Act 1988. ORIMA Research also adheres to the Privacy (Market and Social Research) Code 2021.

I. Executive summary

Executive summary

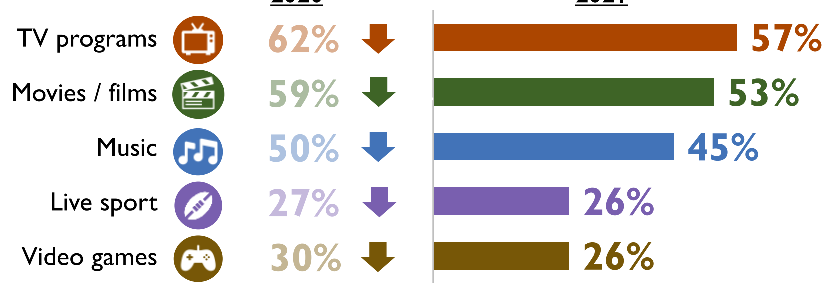
The **2021 Consumer Copyright Infringement Survey** was conducted online from 13 to 26 April, and sought responses from Australian internet users (aged 12+) regarding their online content consumption over the past 3 months. A total of n=2,392 individuals participated in the research.

Overall consumption of content online

71%

of respondents had **consumed** music, movies / films, TV programs, video games and/or live sport online in the past 3 months (i.e. downloaded / streamed / shared)

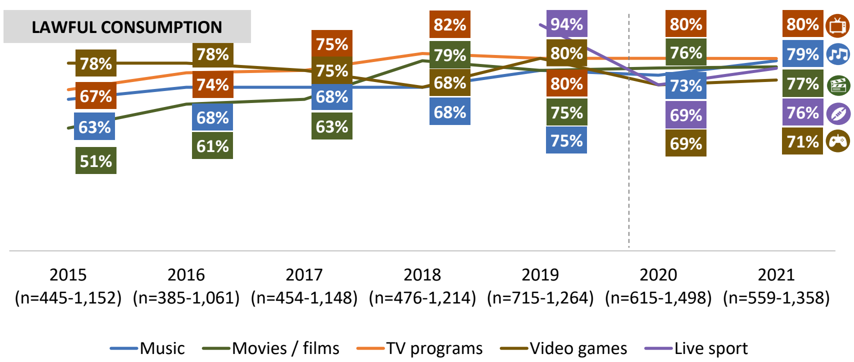
Overall consumption decreased for all content areas since 2020



Lawful consumption of content online

69%

of those who had downloaded or streamed / accessed content online in the past 3 months had only consumed content online that was likely to be **lawful***

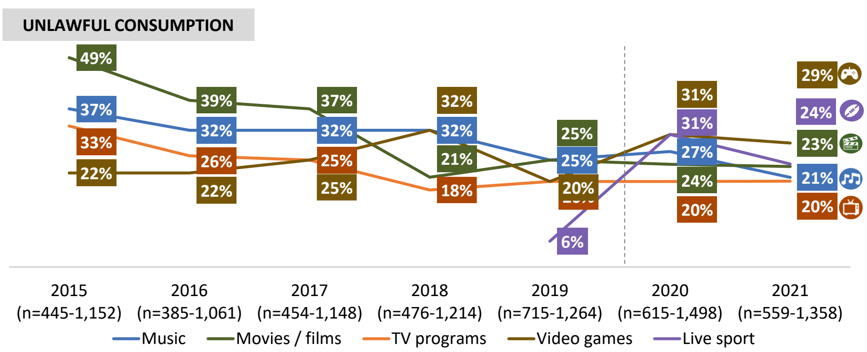


Base: Respondents who had downloaded or streamed / accessed each content type online in the past 3 months

Unlawful consumption of content online

30%

of those who had downloaded or streamed / accessed content online in the past 3 months had consumed at least some content online that was likely to be **unlawful***



Base: Respondents who had downloaded or streamed / accessed each content type online in the past 3 months

* Caution should be used when comparing 2020-21 results to previous years due to methodology changes (indicated by vertical dotted line in charts).

Respondents were more likely to source content unlawfully when **downloading**, and less so when streaming:

43% of those who had **downloaded** content in the past 3 months did so at least some ways that were likely to be unlawful (down from 49% in 2020); while

24% of those wo **streamed / accessed** content in the past 3 months did so in at least some ways that were likely to be unlawful (unchanged since 2020, also 24%).

Confidence

29% of respondents on average were **very confident** that they would be able to identify whether at least one type of online content was lawful or unlawful (slightly lower than 33% of all respondents in 2020).

COVID-19

14% of respondents indicated that they were *more* concerned about lawfulness of consumption since COVID-19.

Infringers were more likely to be concerned (**28%** were concerned, compared to **9%** of non-infringers).

Blocked websites

11% of respondents had **encountered** a blocked website in the past 3 months (in line with 12% in 2020). Of these:

59% reported that they **simply gave up** upon encountering a blocked website (unchanged from 2020, also 59%).

18% Sought alternative lawful access (consistent with 21% in 2020).

13% **bypassed** the blocked website (consistent with 12% in 2020).

5% Sought alternative free but unlawful access (consistent with 6% in 2020).

II. Introduction

Since 2015, the Department[1] has commissioned annual surveys of Internet users' activities across several core content types: music, video games, movies and TV programs. From 2019, live sport was also included. In 2020, the survey methodology and questions were updated to reflect contemporary methods of content delivery and consumption.

In the current survey (2021) a minimum number of changes were made to allow for greater trackability between the 2020 and 2021 results. Key considerations for comparing 2020-21 results to earlier years are outlined over the page.

In 2021, prevalence of online copyright infringement was measured across five main content types: **music**, **movies / film**, **television programs**, **video games** and **live sport**. This report summarises results overall, and by content type. Colours and icons have been used throughout this report to denote **overall** results, and results by content type as follows:

Table 1: Subgroups reported on

Overall	Music	Movies / Film	Television	Video games	Live Sport
(pg.10)	(pg.16)	(pg. 32)	(pg. 49)	(pg. 65)	(pg. 79)

Research objectives

Since 2015, the key objective of the research has been to understand the prevalence of online copyright infringement in Australia and how this has changed over time. The research was also undertaken with the view to addressing the following secondary objectives:

- To understand the level of use and access for each of the five core content types, including streaming or accessing, downloading and sharing, or any other mode of consumption, and the types of services used.
- To understand the attitudes driving online copyright infringement behaviours (and non-infringing behaviours).
- To understand to what extent consumption and attitudes have changed since the first survey and the reasons for any changes.
- To understand the impacts of new and emerging unlawful means of accessing content.
- To measure uptake of subscription streaming services and any impact on infringement rates.
- To understand the impact of the Government's website blocking measures.

[1] The Australian Government Department of Infrastructure, Transport, Regional Development and Communications, formally The Department of Communications and the Arts.

Reading and interpreting the 2020 and 2021 results

In 2020 the survey was modified to reflect contemporary circumstances. The survey update involved consultation within the Department, and with key representatives across the Australian music, film, television (including live sport) and video game industries. The 2021 survey instrument and methodology mirror the 2020 approach closely.

Key considerations that readers should keep in mind when interpreting the 2020 and 2021 results, compared to the 2015–19 data series, are listed below. Further detail is also provided in the Technical Appendix.

- A key outcome from the survey is the proportion of consumption that is unlawful. In previous years this was based on respondents' self-assessment. In 2020 and 2021, content consumption activities are pre-classified at the questionnaire design stage based on their likelihood of being lawful, unlawful, or 'other'.
    - It is recognised that some activities may have ways of being undertaken both lawfully and unlawfully. However, for the purposes of this survey, activities were classified as falling into the one category that best reflects the way that they are undertaken most of the time. Lists within each content chapter outline how each activity has been classified for the purposes of analysis (i.e. as lawful, unlawful or other).
    - Based on the pre-classification of consumption methods based on likelihood of being lawful or unlawful, many of the consumption methods are likely to be lawful. However, a significant minority is, or is likely to be, unlawful.
    - This approach is expected to yield a more reliable estimate as it is less influenced by respondent knowledge of what is and is not lawful, or social desirability to under-report unlawful behaviours.
    - This is a significant change in approach, which means direct comparisons cannot be made to estimates from pre-2020 results on lawfulness.
- In 2020 data collection was moved to entirely online surveys, rather than continue to include a small proportion of telephone surveys with non-internet users. This means that the survey sample frame was more accurately defined as "Australian internet users aged 12+". This change has been maintained in the 2021 survey.
- In 2020 data collection was conducted slightly later in the year (from March-June). This year (2021) the data collection returned to earlier in the year. As such, 2021 respondents were asked to reflect on their activity online from January-March. This may have a small effect on reported consumption patterns.
- The 2020 and 2021 survey only asked respondents about their use of digital content, while in prior years (2015-2019) questions were also asked about whether respondents also owned physical copies of the digital content consumed. This may impact the comparability of some past results.
- While the impact of COVID-19 is still being felt, the absence of major restrictions at the time of the survey means that certain trends in behaviour that may have been disrupted in 2020, may revert back to what they were in prior years in the 2021 results. On the other hand, it is also possible that in 2020 new patterns of behaviour were established that may persist into 2021 and beyond.

III. Observations

The online copyright survey collects a substantial amount of data about consumer behaviours, knowledge, and attitudes. This provides a strong overview of lawful and unlawful consumption of online content in Australia. Looking beyond the descriptive results, there are also some additional patterns and trends that can be seen, and some observations that can be made about possible ways to increase the proportion of lawful consumption. This section summarises a number of these more general observations.

In this section 'infringers' are respondents who reported consuming any content in a way that was likely to be unlawful, while 'non-infringers' reported using only methods likely to be lawful.

Current consumption

- A substantial majority of Australians aged 12+ are engaging with online content.
- While there are definite nuances and characteristics of consumption across the content types, overall consumption patterns are more similar than different across each type of content.
- In general, the consumption of online content has decreased from 2020. This decrease is present across all consumption methods, (streaming, downloading and uploading), and across all forms of content with the exception of sport.
- While the consumption of online content has decreased from last year, streaming remains the most common method of accessing online content.
- Many of the methods being used to consume content online are likely to be lawful.[2] However, a significant minority is, or is likely to be unlawful.
- Ways of consuming content that involve streaming are more likely to be lawful, whereas those that involve downloading content are more likely to be unlawful.[2]
- Online consumption across all content types is higher amongst younger age groups. Younger age groups are also more likely to be 'infringers', though those aged 45–54 reported spending a higher average proportion of time unlawfully downloading TV programs than younger people.
- Across all types of content, internet search engines are the most common way people would initially go about trying to find new content. Around half of respondents also felt it was likely to be lawful to 'access content from a website that is free to use and that has a wide range of content types and styles available'. If people assume the websites that come up in their search results are likely to be lawful, they may have few barriers to following the links, and using them.

[2] The lawfulness of each media consumption method included in the survey was classified based on the likelihood of that method being lawful or not. Respondent behaviours were later assessed as likely to be lawful or unlawful, based on which methods they used to consume content.

Influences on consumption

- A little over a quarter of respondents in the 12–24 age group said they had consciously tried to reduce or eliminate what they thought might be unlawful consumption (across the five content types). The proportion declines smoothly over the older age groups, with 10% or less reporting making such a choice beyond age 45 in relation to each content type. The pattern suggests that targeting younger consumers as they are forming potentially life-long consumption habits could be most important.
- While only one in 10 respondents reported recently encountering a blocked website, the most common action was to simply give up trying to access the content.
- Around two thirds of respondents were at least quite concerned about accessing content unlawfully. Consistent with the findings in 2020, this didn't vary substantially between non-infringers and infringers. Results suggested that emphasising the ethical aspect of behaviours may be useful for keeping those people who are currently lawful users behaving in a lawful manner, while emphasising the risk of their system becoming infected with viruses / spyware / malware may be more advantageous in communications that are aimed more at infringers.
- There is evidence from the results of the survey to suggest that compliance with the law, as well as a broader desire to behave ethically, is a consideration for some people – including some whose current behaviour is unlawful. Collectively, this indicates that continuing to draw community attention to what is and is not lawful will be a positive influence on behaviours.
- However, for both infringers and non-infringers, the fear of being caught and punished was the least common reason to be concerned. This reinforces the fact that in the current environment, voluntary compliance is likely to be a greater lever to lawful behaviours than enforcement / punishment. Furthermore, the primary difference in the cause for concern between infringers and non-infringers was that non-infringers believed that accessing unlawful content was not right.
- Overall, based on the results, an awareness of the financial impact on content creators and protecting Australian content are most likely to reduce unlawful consumption, while familiarity, free content and convenience were most likely to increase unlawful consumption.
- Strategies to positively influence downloaders to more lawful behaviours should be at least in part targeted at older age groups (45–54 years), who are more likely to download TV programs unlawfully.
- The survey results show there is no single dominant rational or emotive strategy that is likely to substantially affect consumption choices. Rather, there are a range of factors likely to be collectively influential on actual and intended behaviours. This indicates a multi-pronged approach incorporating a range of emotive and rational communications strategies, while continuing to address system level interventions that make lawful access easier and simpler than unlawful access, would be most effective to change behaviour.

Impact of COVID-19 Pandemic

In the 2020 survey consumption of online content increased, particularly for movies / film, TV and live sport. The COVID-19 pandemic was thought to be one possible cause for this increase in reported consumption. In 2021, online content consumption decreased for all content types except live sport. This may, at least to some extent, reflect the lifting of COVID-19 restrictions at the time of the 2021 survey and a partial return to a more 'normal life'. However, this does not mean that the results have returned to the levels seen in 2019. For example, while the consumption of movies was in line with the 2019 results, the consumption of TV and Sport remain higher than the pre-COVID results.

IV. Overall consumption

This chapter presents the findings in relation to overall consumption of content online in 2021, as well as trends over time where possible and relevant. Detailed analysis of online consumption for each of the five content types is also presented in subsequent chapters. As noted earlier, comparison between 2020-21 results and 2019 and earlier should be made with caution.

Overall consumption behaviours

71% of respondents had **consumed** music, movies / films, TV programs, video games or live sport online in the past 3 months (downloaded, streamed, or shared any of these categories), down from 75% reported in 2020.

68% had **streamed** content from any of these categories online in the past 3 months, slightly down from 71% in 2020.

25% had **downloaded** content from any of these categories online in the past 3 months, down considerably from 32% in 2020.

11% had **shared** content from any of these categories online in the past 3 months, down slightly from 14% in 2020.

Consumption behaviours by content type

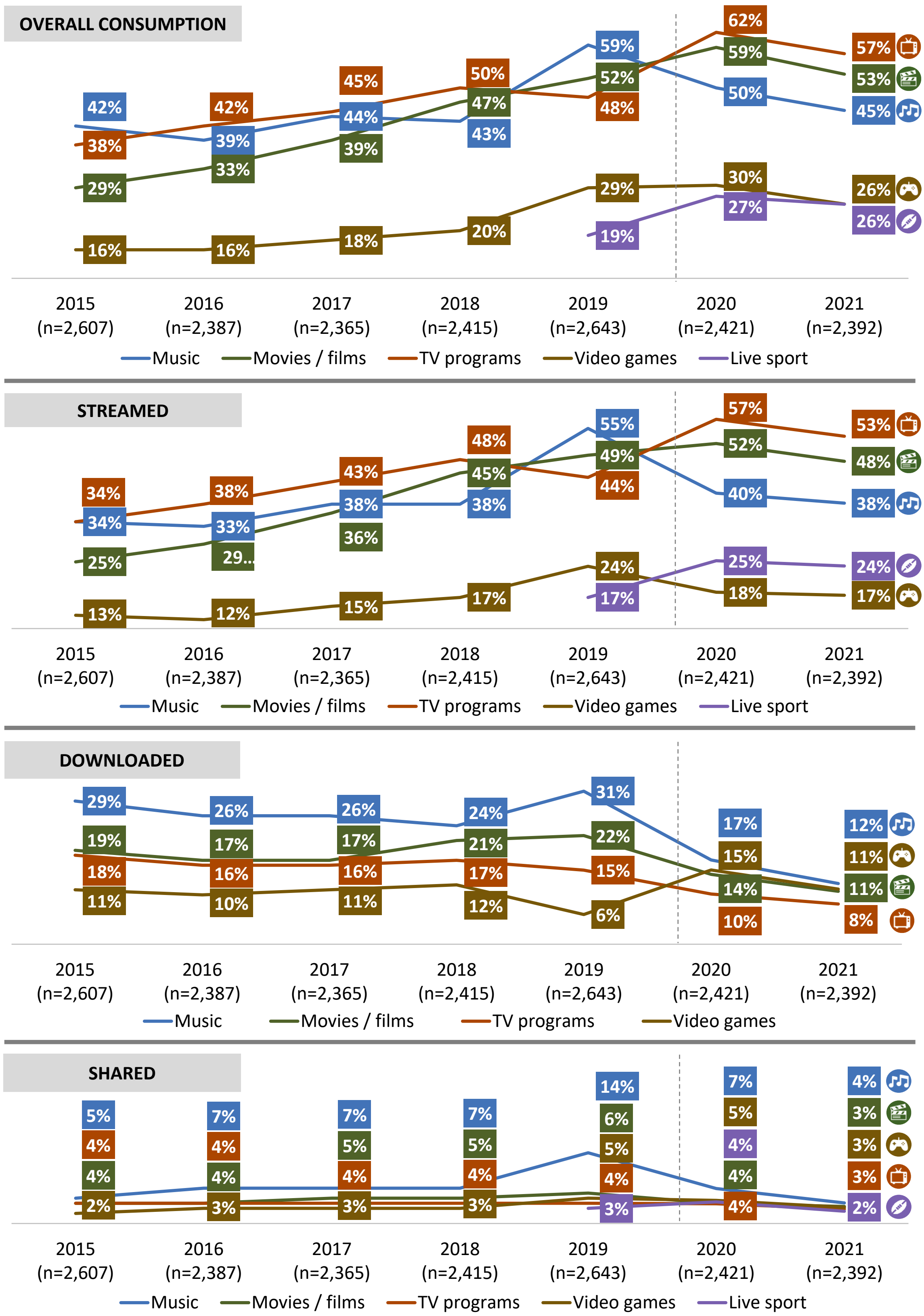
Figure 1 illustrates consumption behaviours across each of the five content types. In terms of overall consumption (engagement via downloading, streaming, or sharing):

- As was the case in 2020, respondents were most likely to have consumed TV programs (57%, versus 62% reported in 2020), movies / films (53% versus 59%) and music (45% versus 50%) online in the past 3 months.
- Over one-quarter also reported engaging with video games (26%, versus 30% in 2020) and live sport (26% versus 27%) online.
- Overall reported engagement with all content types had decreased compared to 2020, with the exception of live sport, for which consumption remained stable.

When looking at specific consumption behaviours (streaming, downloading and sharing), all activity levels either declined or remained broadly similar across all content types in 2021. TV programs remained the most streamed content type (53%), while music remained the most downloaded and shared (12% and 4%).

Figure 1: Proportion of respondents who consumed each content type (either lawfully or unlawfully) 2015–2021

Base: All respondents



Please note: Downloading of live sport not asked. Vertical dotted line indicates changes in survey methodology. Caution should be used when comparing 2020-21 results to results from previous years.

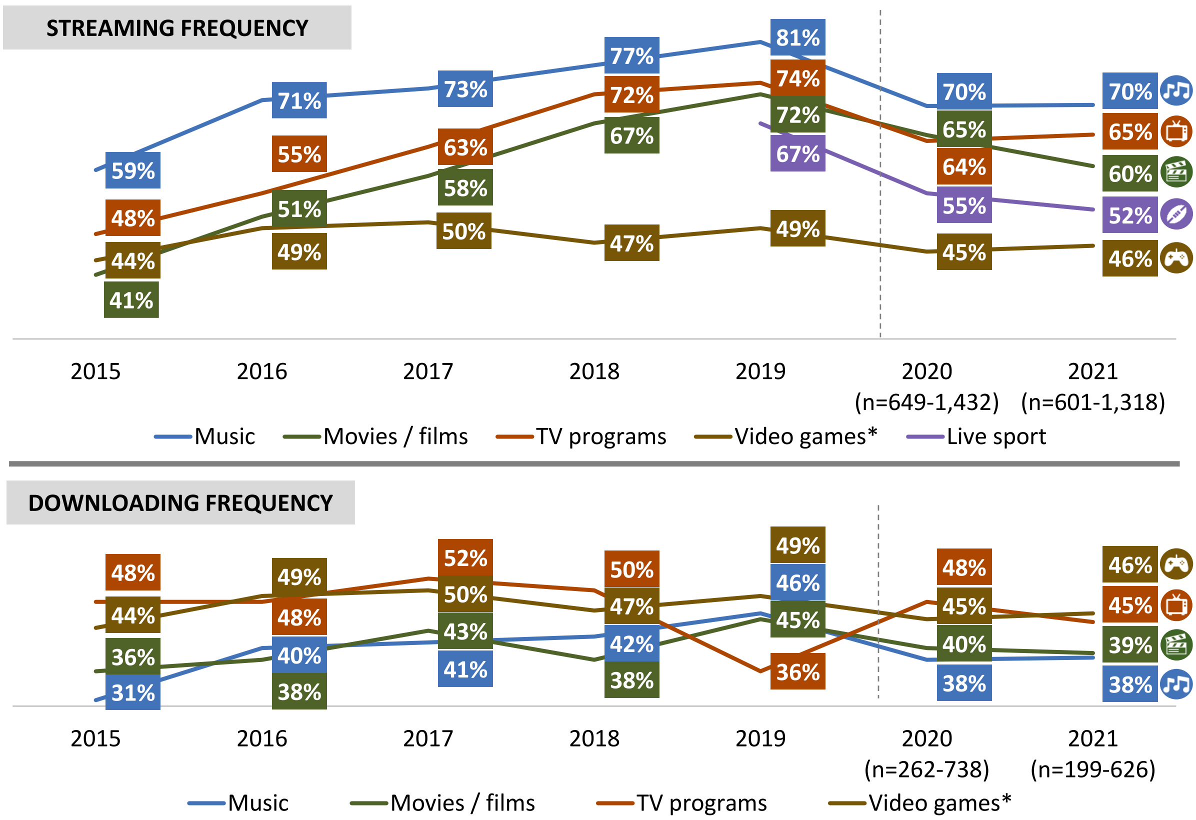
Frequency of consumption by content type

As shown in Figure 2:

- Similar to 2020, music was streamed most frequently in the past 3 months (70% at least weekly, either lawfully or unlawfully). Reported streaming frequency across all content types either declined or remained broadly similar compared to 2020, with movies / films recording the largest decline (from 65% to 60%).
- Video games were downloaded most frequently (46% at least weekly, either lawfully or unlawfully – in line with 45% in 2020), closely followed by TV programs (45%, down from 48% in 2020). Reported downloading frequency for movies / films and music remained consistent with 2020.

Figure 2: Frequency of consumption, by content type (% at least weekly, either lawfully or unlawfully) 2015–2021

Base: Respondents who had consumed each content type online in the past 3 months



* In 2020–21, those who consumed video games online were asked to indicate how frequently they "downloaded / accessed" video games overall. In previous years, this cohort was asked separate frequency questions in relation to downloading and streaming, therefore average results across both activities are shown for 2015–19.

Please note: Downloading of live sport not asked. Vertical dotted line indicates changes in survey methodology. Caution should be used when comparing 2020-21 results to results from previous years.

Lawfulness of consumption

Unlawful behaviour was determined by asking respondents to indicate which sources they had used in the past 3 months to download or stream / access content online. These various sources of downloading / accessing content online were pre-classified as either lawful or unlawful. Although some sources may have the potential to be both lawful and unlawful, for the purposes of the research, each source was classified as either more likely to be lawful, or unlawful.

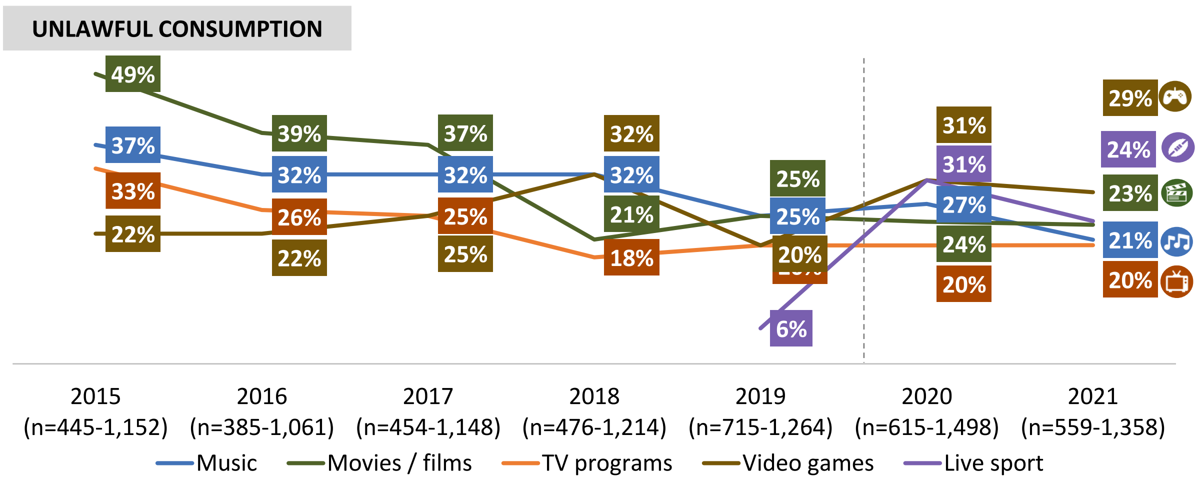
A full list of sources, and how they have been classified, are presented in more detail in the remainder of this report.

30% of those who downloaded or streamed / accessed content online in the past 3 months had consumed at least some content online in ways that were likely to be unlawful (across the five content types), down from 34% reported in 2020. Just 1% of respondents had consumed content only unlawfully, the same proportion that did so in 2020 (1%).

By content type, unlawful consumption was highest in relation to video games (28% – see Figure 3). While the proportion of respondents who had unlawfully consumed movies / films and TV programs was broadly consistent compared to 2020, unlawful consumption of live sport, music and video games declined in 2021.

Figure 3: Lawfulness of consumption (at least one <u>unlawful</u> source used), by content type 2015–2021

Base: Respondents who had consumed each content type online in the past 3 months



Please note: Any comparisons against the results from 2015–19 should be done with consideration to changes in the research methodology and approach, and more specifically in this case, the different way that unlawful behaviours were identified. Please see Chapter II for further information regarding these changes.

Further exploration of unlawful consumption behaviours revealed that respondents were more likely to source content unlawfully when downloading, and less so when streaming.

43% of those who had **downloaded** content online in the past 3 months did so in at least some **unlawful** ways (a notable decline from 49% reported in 2020); while

24% of those who **streamed / accessed** content online in the past 3 months did so in at least some **unlawful** ways (in line with 24% in 2020).

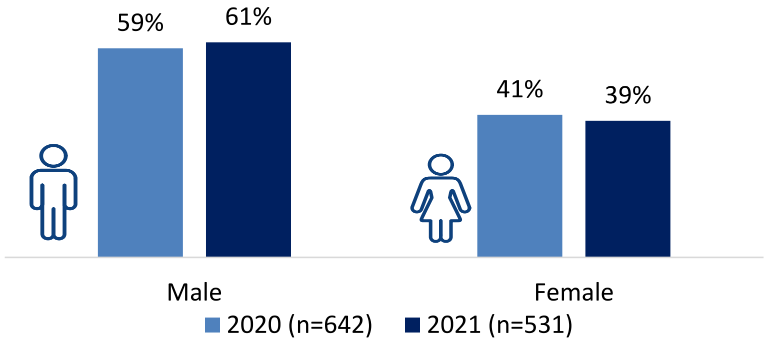
Profile of infringers

A demographic profile of infringers was created to understand the types of respondents who had undertaken unlawful behaviours compared to 2020. Infringers were defined as those who had accessed content in at least one way that was likely to be unlawful. The incidence of infringers dropped from 34% in 2020 to 30% in 2021.

As shown in Figure 4, infringers were more likely to be male (61% versus 39% female). This was broadly consistent with the gender profile in 2020 (59% versus 41% female – see Figure 4).

Figure 4: Gender of infringers, 2020-2021

Base: Infringers

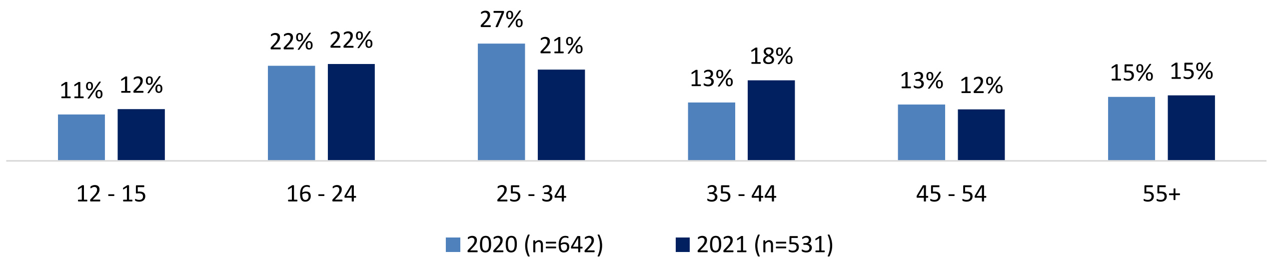


Q7. Are you..?

Figure 5 illustrates that the age profile of infringers was somewhat different to that in 2020, with those aged 25-34 being less likely to be infringers while those aged 35-44 were more likely.

Figure 5: Age of infringers, 2020-2021

Base: Infringers

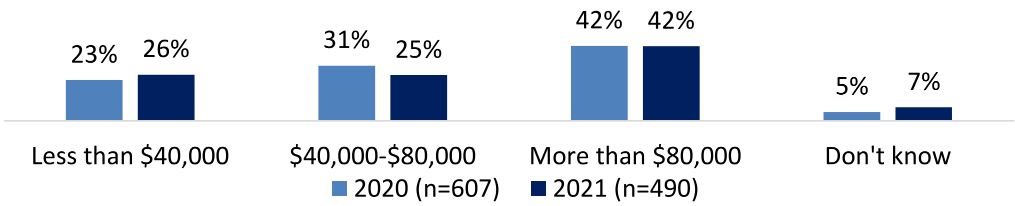


q1 / q6. How old are you?

The profile of infringers did not differ substantially by household income level, or employment status between 2020 and 2021, as shown in Figure 6 and Figure 7.

Figure 6: Household income level of infringers, 2020-2021

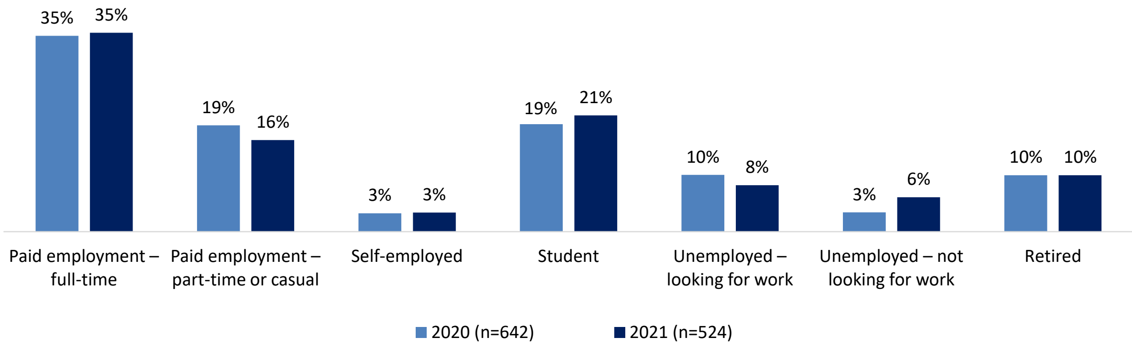
Base: Infringers



q11. What is your combined household income? (Prefer not to say excluded)

Figure 7: Employment status of infringers, 2020-2021

Base: Infringers



q10. What is your employment status?

Prefer not to say not shown (<1% in 2020, <1% in 2021) and Other not shown (2% in 2020, <1% in 2021). Part time and casual result is shown aggregated. Stay at home parent also not shown (2% in 2020, 2% in 2021).

V. Music

Music

Content consumption summary (2021)

45% (-5pp)
of all respondents **consumed** music content online in 2021

79% (+6pp)
of music consumers accessed all music content **lawfully**

21% (-6pp)
of music consumers accessed some music content **unlawfully**

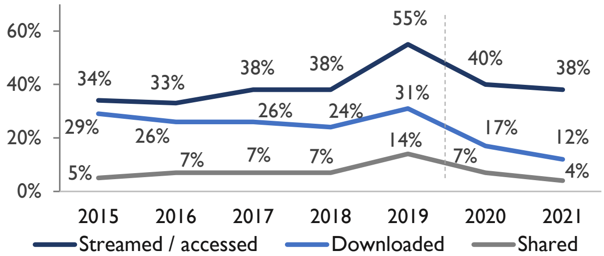
How is music content consumed through the internet?

In the past 3 months:

38% **streamed / accessed** music online

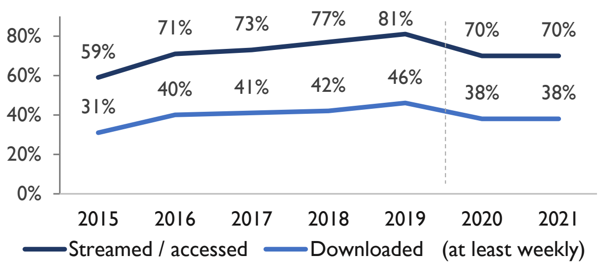
12% **downloaded** music online

4% **shared** music online



70% of those who **streamed / accessed** music online did so **at least weekly**

38% of those who **downloaded** music online did so **at least weekly**



Where are people going to consume music content online?

In 2021, the top six sites or services used to consume music content online were (change since 2020 indicated in brackets):

57% (-2pp) YouTube

55% (+3pp) Spotify

21% (0pp) Apple

15% (-4pp) Facebook

14% (-1pp) Google Play

9% (-1pp) Amazon Music

In comparison, the top six sites or services used in 2015 were:

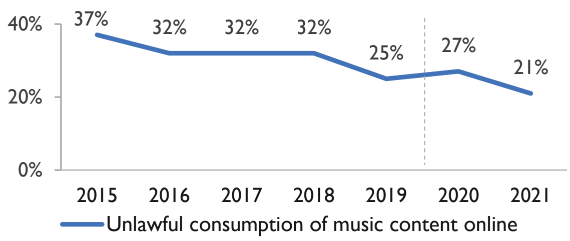
1. YouTube – 58%
2. Apple – 45%
3. Facebook – 23%
4. Spotify – 19%
5. Google Play – 11%
6. Amazon – 9%

How much music content consumption online was unlawful?

21% consumed music content online in at least some **unlawful** ways

Of those who **streamed / accessed** music online **7%** did so unlawfully

Of those who **downloaded** music online **62%** did so unlawfully



Compared to non-infringers, **infringers** were more likely to be:

- Male (61%)
- Aged 12 to 24 years (44%)
- Household > $40,000 (81%)

Compared to non-infringers, **infringers** were more likely to:

- Download (79%) and share (28%) music online
- Use all sites / services to consume music online (except Spotify)
- Unlawfully consume movies / films (72%), TV programs (60%), sports (56%) and video games (64%) online

NOTE: Caution should be used when comparing 2020-21 results to previous years due to methodology changes (indicated by vertical dotted line in charts).

Chapter overview

This chapter presents the findings in relation to music consumption online. Half of respondents had engaged with music online in the past 3 months, primarily through YouTube and Spotify.

Almost three-quarters of those who consumed music online did so lawfully (non-infringers). The remaining quarter consumed at least some music unlawfully (infringers), however most infringers also streamed / downloaded music through lawful sources. Infringement primarily occurred when downloading music, most commonly through online converters or 'stream ripping' software.

Consumption behaviours

45% of respondents had **engaged with music online in the past 3 months** (downloaded, streamed or shared).[3] This is significantly lower than the 50% reported in 2020.

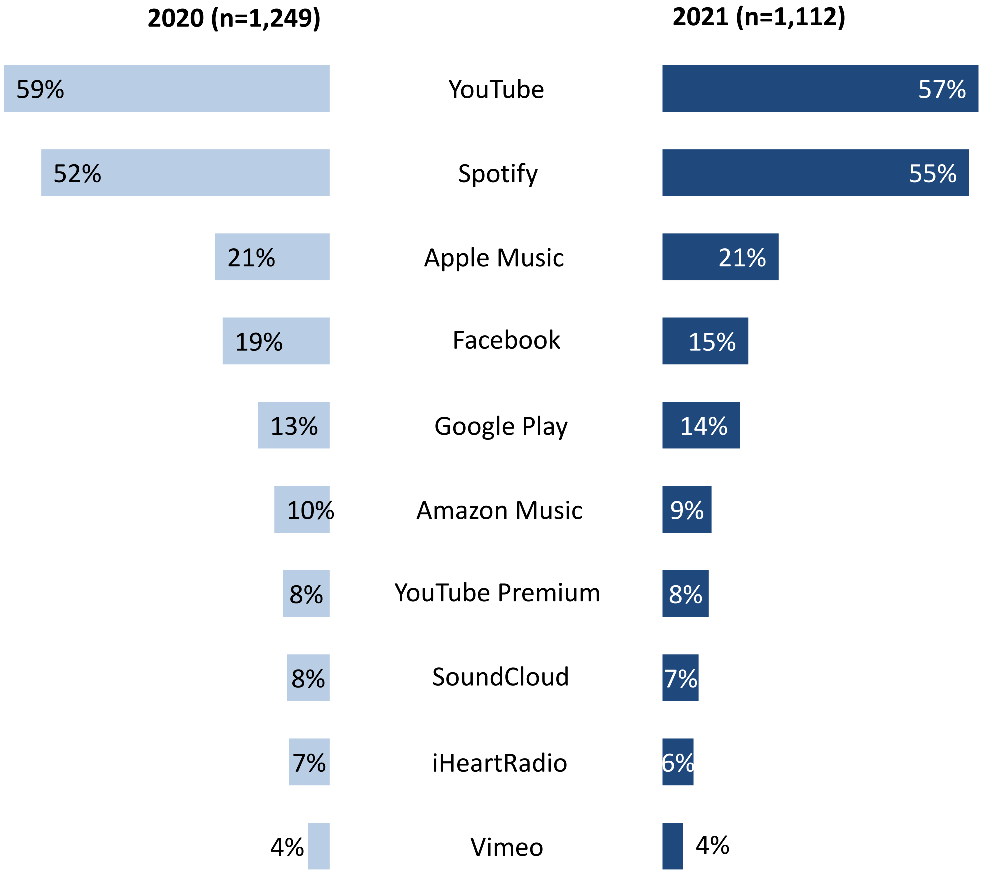
Overall, streaming remained the most common way that respondents had engaged with music (38% of all respondents, broadly in line with 40% in 2020), whilst 12% had downloaded (down from 17% in 2020), and 4% had shared music online (down from 7% in 2020).

Among respondents who had consumed music, the most used sites and services were YouTube (57%) and Spotify (55% - Figure 8 overleaf). In contrast, only a small number had used torrent services such as uTorrent (2%), BitTorrent (3%) or The Pirate Bay (2%).

[3] Q12. In the past 3 months, which of the following have you streamed / accessed, downloaded, or shared through the internet? (n=2,421)

Figure 8: Top 10 services used to download, stream / access or share music

Base: Respondents who had downloaded or streamed / accessed music in the past 3 months



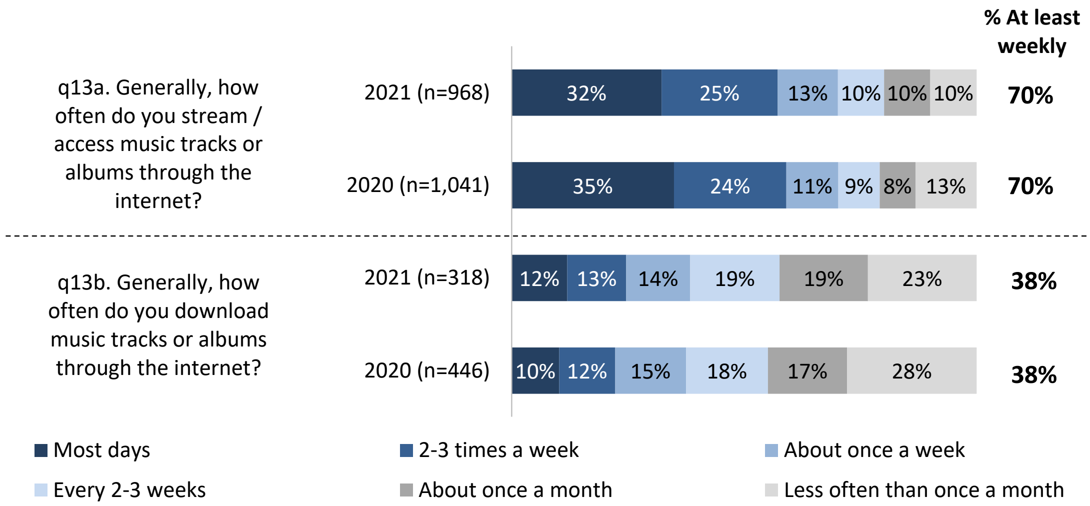
Q14. Which sites or services have you used in the past 3 months to download, stream / access, or share music through the internet? (Multiple response)

Frequency of consumption

As shown in Figure 9, the majority of those who streamed / accessed music online did so at least weekly (70% of music streamers, 27% of all respondents). Music was downloaded relatively less frequently, with 38% of downloaders (5% of all respondents) indicating that they downloaded music tracks or albums at least weekly.

Figure 9: Frequency of music consumption

Base: Respondents who had downloaded or streamed / accessed music in the past 3 months



Q13a. Generally, how often do you stream / access music tracks or albums through the internet? / Q13b. Generally, how often do you download music tracks or albums through the internet?

As illustrated in Table 2 overleaf, the amount and frequency of music consumption varied somewhat by age, gender, household income and employment status. These trends were consistent with those reported in 2020.

Overall, both consumption of music online and frequency of consumption was highest among those aged between 12 and 24 and, 25 and 34 and generally declined with age.

Online music consumption was higher among males, as was frequency of downloading.

Online music consumption was highest among those in households earning **over $80,000**. Frequency of consumption was also highest among this group.

Online music consumption and frequency of consumption remained highest among **students**.

Table 2: Consumption of music online, by age, gender, household income and employment status, 2021

Base: All respondents, and respondents who had downloaded or streamed / accessed music in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
Overall n=	2392	1192	1200	531	400	438	407	327	289	576	579	839	759	293	111	107	135	332	148	140	395
Consume music online	**45%**	**48%**	**43%**	**66%**	**60%**	**58%**	**39%**	**26%**	**20%**	**35%**	**45%**	**54%**	**53%**	**50%**	**61%**	**43%**	**43%**	**68%**	**50%**	**43%**	**19%**
Stream / access music	**38%**	**40%**	**37%**	**54%**	**52%**	**51%**	**33%**	**21%**	**16%**	**29%**	**38%**	**48%**	**46%**	**43%**	**50%**	**35%**	**40%**	**56%**	**40%**	**36%**	**15%**
Download music	**12%**	**14%**	**11%**	**24%**	**15%**	**14%**	**8%**	**6%**	**5%**	**9%**	**13%**	**14%**	**13%**	**10%**	**23%**	**11%**	**7%**	**25%**	**17%**	**12%**	**5%**
Streamed n=	968	502	466	286	206	224	137	69	46	181	230	415	353	129	56	39	54	187	61	52	63
2-3 times a week or more often	57%	56%	59%	71%	61%	53%	55%	43%	27%	44%	60%	62%	57%	59%	73%	46%	58%	72%	55%	53%	30%
About once every 1-3 weeks	23%	25%	21%	19%	22%	30%	19%	25%	22%	26%	21%	24%	26%	22%	11%	39%	27%	18%	19%	15%	21%
About once a month or less often	20%	19%	21%	10%	17%	17%	26%	32%	50%	30%	19%	14%	16%	19%	16%	15%	15%	10%	26%	33%	50%
Downloaded n=	318	176	142	130	59	62	33	21	13	58	80	120	99	28	26	12	9	85	26	17	20
2-3 times a week or more often	25%	24%	25%	38%	26%	10%	12%	9%	23%	27%	16%	25%	22%	21%	27%	25%	*	33%	35%	24%	6%
About once every 1-3 weeks	33%	31%	35%	38%	34%	41%	27%	19%	8%	28%	36%	36%	32%	46%	22%	24%	*	44%	16%	28%	27%
About once a month or less often	42%	45%	39%	25%	40%	49%	61%	72%	69%	45%	49%	38%	46%	33%	51%	50%	*	23%	50%	49%	67%

Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.

Caution: low sample sizes for some groups, n=<10 suppressed (*).

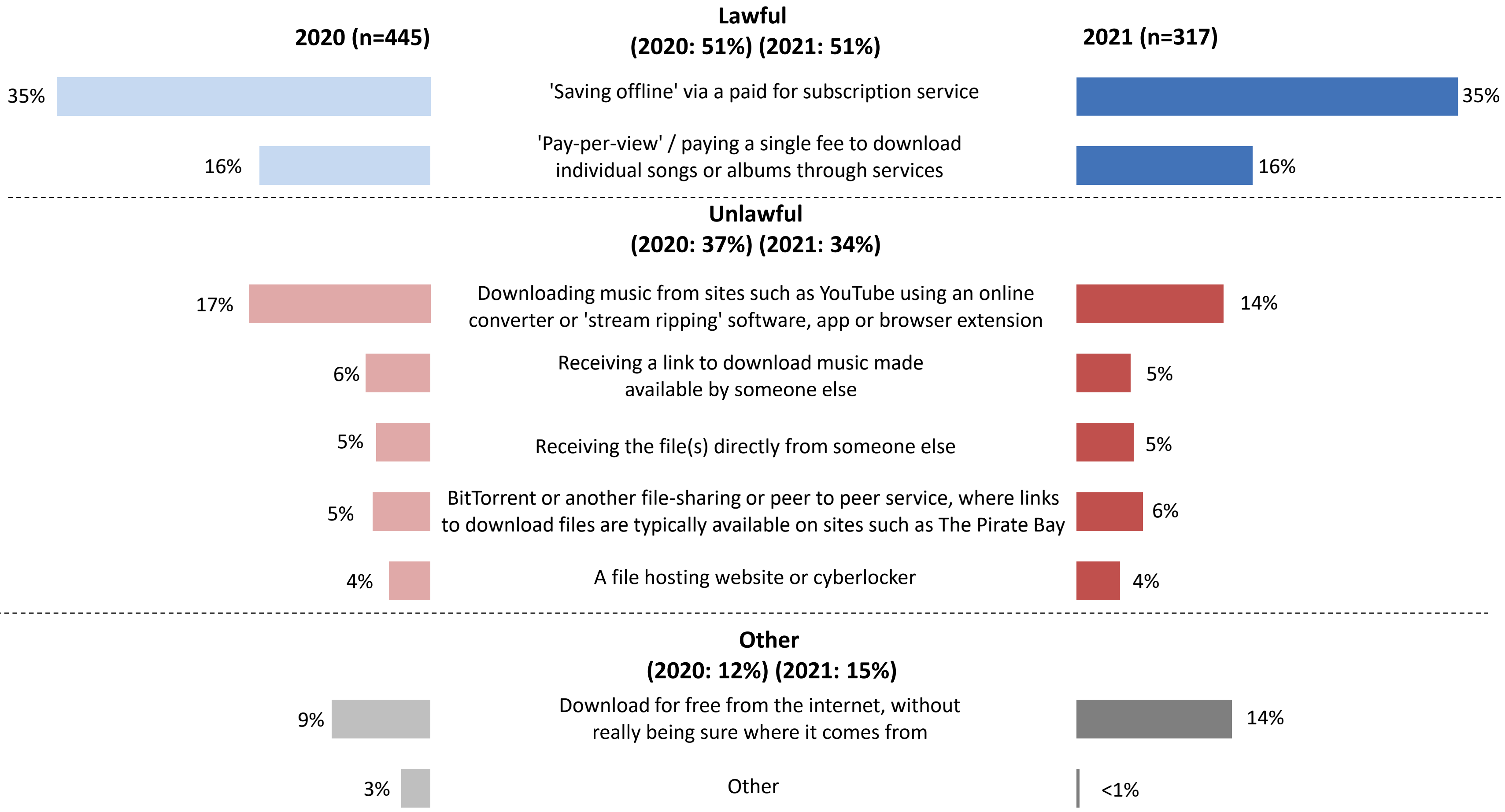
Sources of downloading music

Respondents were asked to nominate the sources they typically used to download music online and indicate the proportion of their time spent using each source. As illustrated in Figure 10 overleaf, respondents reportedly used:

- lawful sources an average of 51% of the time (i.e. via ‘pay-per-view’ or ‘saving offline’ via a paid subscription service); and
- unlawful sources an average of 34% of the time (versus 37% in 2020) – the most common of which was online converters or ‘stream ripping’ (14% versus 17% in 2020).

Figure 10: Average proportion of time spent downloading music, by source[4]

Base: Respondents who had downloaded music in the past 3 months



Q15. How is the way that you download music typically split across the following? (Enter percentage of time for each option)

[4] Results reflect the average proportion of time spent using each source identified by the respondent and does not factor in the actual amount of time spent downloading content.

Based on their responses, respondents were classified into three consumer groups: using lawful sources only, using unlawful sources only, or using a mix of lawful and unlawful sources to download music.[5]

42% used a **mix of lawful and unlawful** sources to download music online (in line with 46% in 2020).

38% used **only lawful** sources to download music online (comparable with 34% in 2020).

19% used **only unlawful** sources to download music online (in line with 20% in 2020).

As shown in Table 3, music downloading behaviours varied somewhat by age, gender and employment status.

The average proportion of time spent using **unlawful sources** to download music was highest among those **aged between 25 and 34** (on average 38% of the time versus 41% in 2020). Broadly, there was more consistent usage of unlawful sources between age groups compared to last year. This is partially due to a decrease in usage among those aged 12 to 24 (from 45% in 2020 to 32% in 2021) and an increase among those aged 65+ (from 16% to 23%).

As in 2020, the average proportion of time spent using unlawful sources to download music was higher among **males** (37%, compared to 29% for females).

The average proportion of time spent using **unlawful sources** to download music did not vary by household income.

The average proportion of time spent using **unlawful sources** to download music was highest among those who were unemployed but looking for work (41% versus 53% in 2020).

[5] Those who used only 'other' sources were excluded from this analysis.

Table 3: Average proportion of time spent downloading music, by age, gender, household income and employment status, 2021

Base: Respondents who had downloaded music in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000-$80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
n=	318	176	142	130	59	62	33	21	13	58	80	120	99	28	26	12	9	85	26	17	20
Lawful	**51%**	**45%**	**60%**	**55%**	**49%**	**52%**	**56%**	**43%**	**42%**	**48%**	**44%**	**53%**	**51%**	**56%**	**59%**	**45%**	*	**57%**	**49%**	**50%**	**27%**
'Saving offline' via a paid for subscription service	35%	32%	39%	44%	36%	29%	30%	24%	21%	36%	24%	37%	36%	33%	36%	17%	*	43%	35%	31%	9%
'Pay-per-view' / paying a single fee to download individual songs/albums	16%	13%	21%	11%	13%	23%	25%	19%	20%	12%	20%	16%	15%	23%	23%	28%	*	13%	14%	19%	17%
Unlawful	**34%**	**37%**	**29%**	**32%**	**38%**	**35%**	**34%**	**37%**	**23%**	**39%**	**35%**	**33%**	**37%**	**30%**	**24%**	**37%**	*	**31%**	**41%**	**36%**	**40%**
Downloading music from sites such as YouTube using an online converter or 'stream ripping' software, app or browser extension	14%	15%	12%	11%	13%	18%	15%	24%	8%	17%	15%	11%	13%	13%	12%	14%	*	11%	18%	24%	19%
Receiving a link to download music made available by someone else	5%	5%	3%	5%	5%	4%	4%	4%	4%	6%	4%	5%	5%	3%	3%	2%	*	5%	6%	3%	8%
Receiving the file(s) directly from someone else	5%	5%	5%	6%	8%	4%	2%	3%	4%	5%	5%	5%	7%	2%	3%	2%	*	6%	3%	1%	6%
BitTorrent or another file-sharing or peer to peer service, where links to download files are typically available on sites, such as The Pirate Bay	6%	8%	4%	4%	9%	7%	9%	5%	7%	5%	7%	8%	8%	3%	5%	17%	*	4%	7%	7%	6%
A file hosting website or cyberlocker	4%	4%	4%	6%	4%	2%	4%	<1%	0%	6%	4%	4%	4%	8%	<1%	2%	*	5%	7%	1%	<1%
Other	**15%**	**18%**	**11%**	**13%**	**13%**	**14%**	**10%**	**20%**	**35%**	**13%**	**21%**	**14%**	**12%**	**14%**	**16%**	**17%**	*	**12%**	**10%**	**14%**	**34%**
Download for free from the internet, without really being sure where it comes from	14%	17%	11%	13%	13%	14%	10%	16%	35%	13%	20%	14%	12%	14%	16%	17%	*	12%	10%	9%	34%
Other	<1%	<1%	0%	0%	0%	0%	0%	4%	0%	0%	1%	0%	0%	0%	0%	0%	*	0%	0%	5%	0%

Q15. How is the way that you download music typically split across the following? (Enter % of time for each).

Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.

Caution: low sample sizes for some groups, n=<10 suppressed (*).

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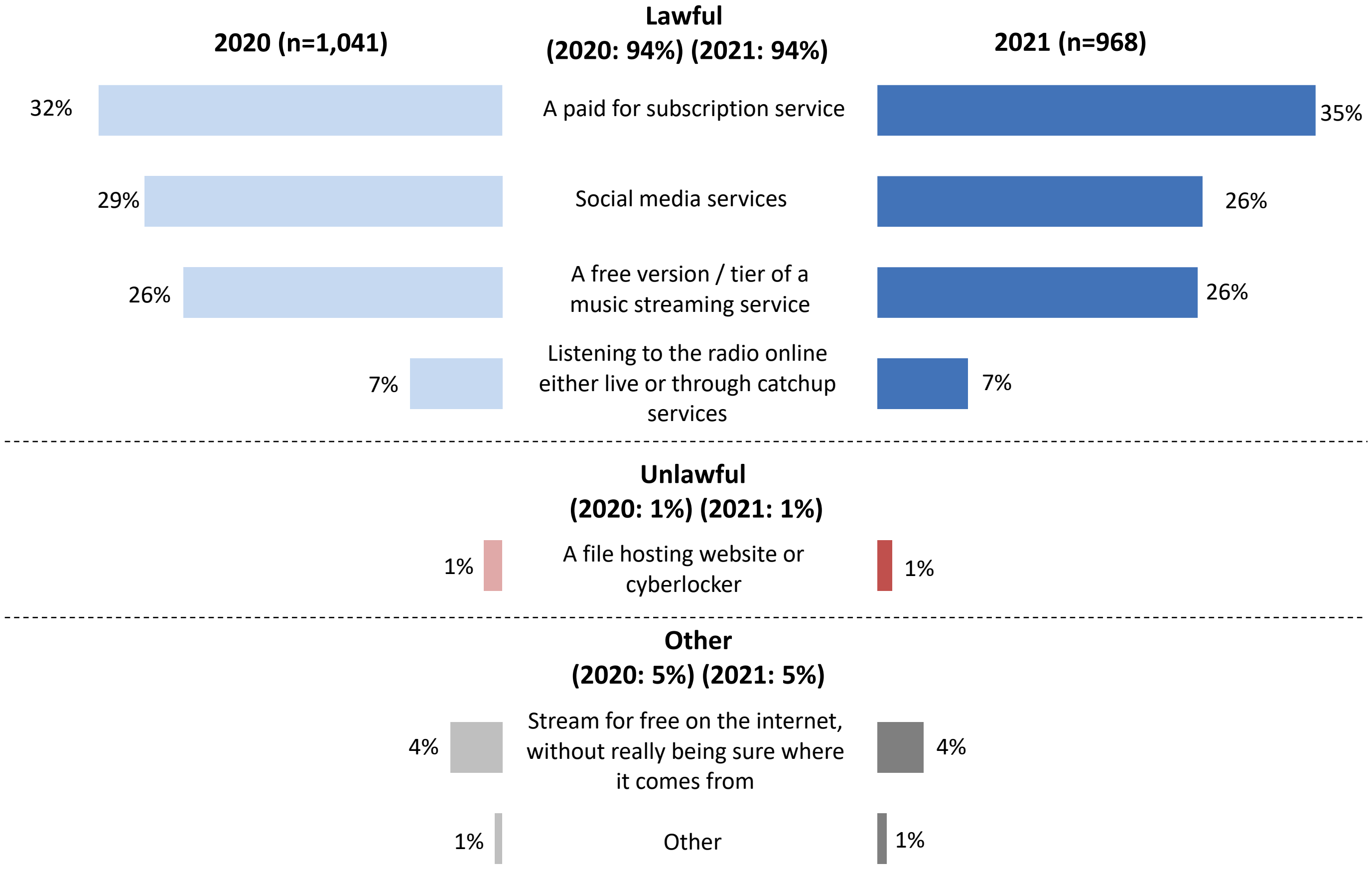
Sources of streaming music

In contrast to music downloads, nearly all music streaming was conducted through lawful sources (94%; in line with 2020 – see Figure 11 overleaf). This was primarily via a paid subscription service (35%), social media services (26%) or a free version / tier of a music streaming service (26%). While social media services are complex and varied, they are generally considered likely to be lawful.

Figure 11: Average proportion of time spent streaming music, by source[6]

Base: Respondents who had streamed / accessed music in the past 3 months



Q16. How is your music streaming time typically split across the following? (Enter percentage of time for each option)[7]

[6] Please note that results reflect the average proportion of time spent using each source identified by the respondent and does not factor in the actual amount of time each respondent spent streaming content.
[7] Survey respondents were intentionally not provided with the definition of these sources, in order to test their understanding of them. Respondents were asked to assume they did not use such technologies if they did not know what they were. A cyber locker is a third-party file hosting services that can be accessed over the internet. They provide storage a secure storage space for files / media / data online.

Again, respondents were classified into three consumer groups: using lawful sources only, using unlawful sources only, or using a mix of lawful and unlawful sources to stream music.[8]

93%

of respondents who streamed music **only did so lawfully** (compared to 90% in 2020). A minority (7% versus 10% in 2020) used a mix of lawful and unlawful sources to stream music online, while no respondents only used unlawful sources.

Consistent with results from last year, those who said that they had downloaded music for free without really being sure where it comes from (4%), indicated that they primarily obtained this content via:

- Google search / search engine (31%); and
- through unspecified / free music websites (19%).

As shown in Table 4, music streaming behaviours varied by certain demographic characteristics.

While the proportion of lawful consumption of online music content was consistent across the different age groups there were differences in the channels used. Usage of paid subscription services was highest among those aged **12 and 24**, and the use of this source decreased with age. In contrast, usage of social media services increased with age, and was highest amongst those aged **65+**. Streaming for free without being sure of where it comes from was also higher amongst those aged **65+**.

While usage of lawful and unlawful sources to stream music online was **broadly similar** among males and females, females reported a higher incidence of paying a single fee to download individual songs.

Proportional usage of lawful and unlawful sources to stream music online **did not differ** by household income level.

By employment status, again proportional usage of lawful and unlawful services was **broadly similar**, though those who were unemployed or retired were generally more likely than others to use social media services.

[8] Those who used only 'other' sources were excluded from this analysis.

Table 4: Average proportion of time spent streaming music, by age, gender, household income and employment status, 2021

Base: Respondents who had streamed / accessed music in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000-$80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
n=	968	502	466	286	206	224	137	69	46	181	230	415	353	129	56	39	54	187	61	52	63
Lawful	**94%**	**93%**	**95%**	**92%**	**96%**	**97%**	**95%**	**98%**	**88%**	**95%**	**93%**	**94%**	**94%**	**95%**	**96%**	**99%**	**97%**	**94%**	**97%**	**95%**	**91%**
A paid for subscription service	35%	33%	38%	44%	42%	37%	26%	21%	10%	29%	28%	41%	39%	32%	42%	36%	45%	42%	27%	25%	13%
Social media services	26%	29%	24%	17%	24%	26%	32%	44%	43%	36%	31%	21%	22%	27%	15%	38%	24%	21%	34%	41%	44%
A free version / tier of a music streaming service	26%	24%	28%	23%	24%	28%	28%	26%	26%	23%	28%	24%	25%	29%	33%	17%	22%	24%	27%	26%	26%
Listening to the radio online either live or through catchup services	7%	8%	6%	8%	6%	6%	9%	6%	9%	7%	7%	8%	8%	6%	6%	8%	6%	7%	9%	4%	7%
Unlawful	**1%**	**1%**	**1%**	**3%**	**1%**	**1%**	**<1%**	**0%**	**0%**	**<1%**	**1%**	**2%**	**2%**	**1%**	**0%**	**1%**	**<1%**	**2%**	**<1%**	**<1%**	**0%**
A file hosting website or cyberlocker	1%	1%	1%	3%	1%	1%	<1%	0%	0%	<1%	1%	2%	2%	1%	0%	1%	<1%	2%	<1%	<1%	0%
Other	**5%**	**5%**	**4%**	**5%**	**3%**	**2%**	**5%**	**2%**	**12%**	**5%**	**5%**	**4%**	**4%**	**4%**	**4%**	**1%**	**2%**	**4%**	**3%**	**4%**	**9%**
Stream for free from the internet, without really being sure where it comes from	4%	4%	3%	5%	3%	2%	2%	1%	10%	4%	4%	4%	4%	4%	4%	<1%	11%	4%	3%	4%	6%
Other	1%	1%	<1%	<1%	<1%	0%	3%	1%	2%	1%	1%	1%	1%	<1%	0%	<1%	2%	<1%	0%	0%	3%

Q16. How is your music streaming time typically split across the following? (Enter % of time for each). Caution low sample sizes for some groups.

Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.

Caution: low sample sizes for some groups, n=<10 suppressed (*).

Behaviour change: sources of downloading / streaming music

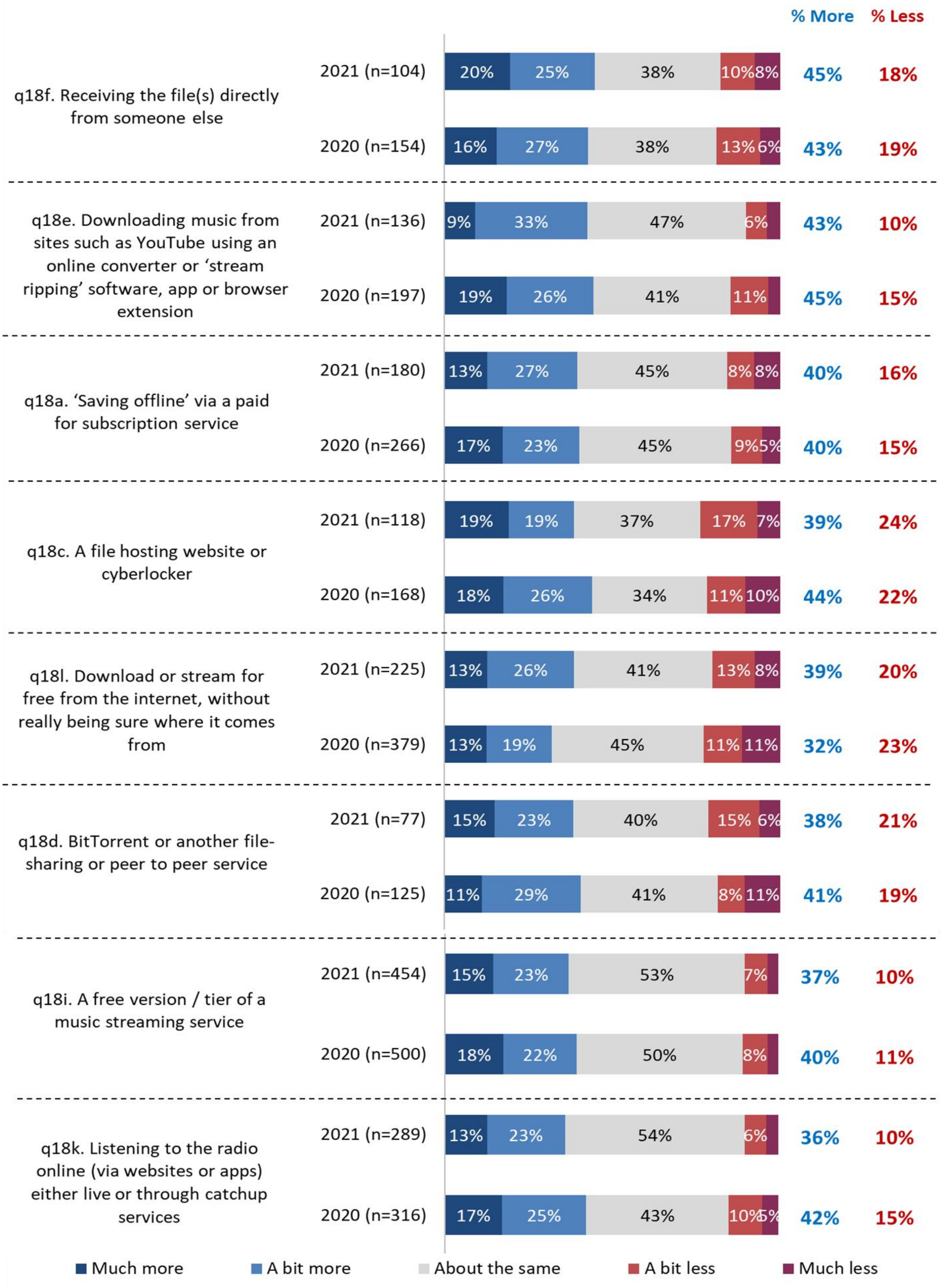
In order to explore any changes in behaviour over time, respondents were asked whether they were using various sources more, less, or about the same as this time one year ago.

As illustrated in Figure 12 overleaf:

- In general, people reported downloading and streaming music about the same amount (between 37%-58% of respondents indicated that they had used each source about the same amount versus 34%-53% in 2020).
- Less than one-quarter had used each source 'much' or 'a bit' **less** (9%-24% of respondents per source versus 10%-23% in 2020).
- While receiving a file directly from someone else saw the biggest increase, the magnitude of this increase was smaller than observed in 2020 (45% reported 'Much more' or 'A bit more' versus 47% in 2020.
- While in 2020 40% of people reported an increase in the frequency of streaming via a subscription service, this has dropped to 33% in 2021.

Figure 12: Change in usage of sources to download / stream music

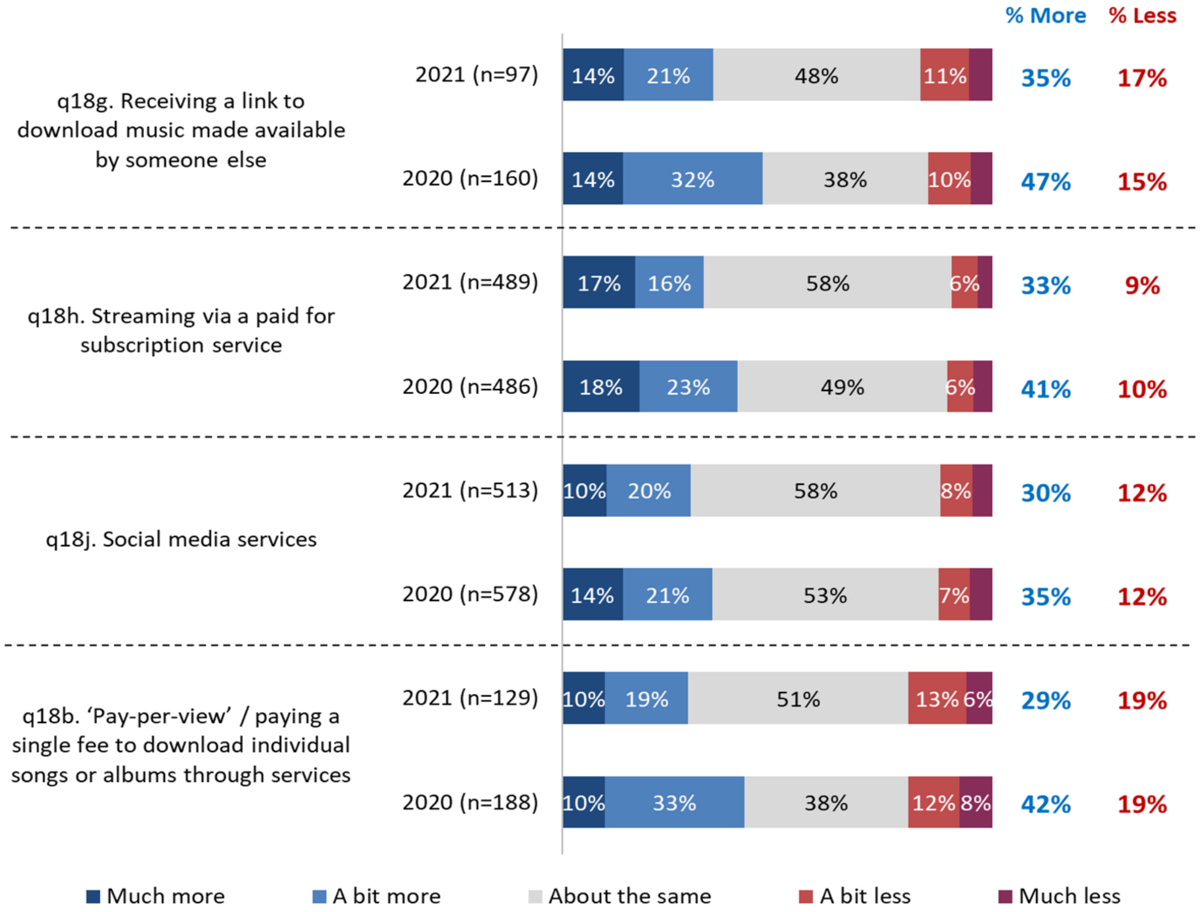
Base: Respondents who had used each source in the past 3 months



Q19. Overall, compared to this time last year, how often are you using these method(s) to access music? '% More' refers to the sum of 'much more' and 'a bit more', whilst '% less' refers to the sum of 'much less' and 'a bit less'.

Figure 12 (continued): Change in usage of sources to download / stream music

Base: Respondents who had used each source in the past 3 months



Q19. Overall, compared to this time last year, how often are you using these method(s) to access music? '% More' refers to the sum of 'much more' and 'a bit more', whilst '% less' refers to the sum of 'much less' and 'a bit less'.

Those who indicated they were using a particular method more (n=440 in total) were asked to elaborate on the reasons why. The reasons provided were broadly consistent with those reported last year. Specifically, respondents most commonly reported they used a particular method more because:

- they had more time to listen to music, e.g. due to impacts of the COVID-19 pandemic (18%);
- it was free / cheaper (18%); and
- it was convenient / easier (17%).

Those who indicated they were using a particular method less (n=229 in total) most commonly reported this was because:

- they had less interest in music at the moment (14%);
- they didn't have enough time (13%); and
- of a range of other reasons (19%), prominent among these changes to routines due to COVID-19 (i.e. less travelling), and changes in financial circumstances (some noted to also be related to COVID-19).

Profile of music infringers

Overall (across both downloading and streaming / accessing), 79% of those who consumed music online did so lawfully (non-infringers).

21% consumed music in at least some **unlawful** ways (infringers) – 18% through a mix of lawful and unlawful sources, and 3% via unlawful sources only.

Table 5 illustrates several demographic and behavioural differences between the two groups of consumers (infringers and non-infringers of music).

Table 5: Profile of music infringers versus non-infringers

79% **Non-infringers (all activities lawful)** Base: Respondents who consumed music online lawfully only (n=850 versus n=888 in 2020)	21% **Infringers (some / all activities unlawful)** Base: Respondents who consumed music online unlawfully (n=239 versus n=339 in 2020)
Compared to infringers, non-infringers were more likely to be:	Compared to non-infringers, infringers were more likely to be:
Female (51% versus 52% in 2020)	Male (61% versus 62% in 2020)
Aged 35 years and over (54% versus 55% in 2020)	Aged 12 to 24 years (44% versus 43% in 2020)
Household income* < $40,000 (25% versus 25% in 2020)	Household income * > $40,000 (81% versus 82% in 2020)
Retired (9 % versus 11% in 2020)	No substantial differences by employment status
And were more likely to report:	And were more likely to report:
Streaming / accessing music online (95 % versus 93% in 2020)	Downloading (79% versus 84% in 2020) and sharing (19% versus 28%) music online
Using Spotify (57% versus 54% in 2020)	Unlawfully consuming movies / films (72%), TV programs (60%), sports (56%) and video games (64%) online

*Excludes don't know and prefer not to say.

VI. Movies

Movies / Film

Content consumption summary (2021)

53% (-6pp) of all respondents **consumed** movie/film content online in 2021

77% (+1pp) of movie/film consumers accessed all movie/film content **lawfully**

23% (-1pp) of movie/film consumers accessed some movie/film content **unlawfully**

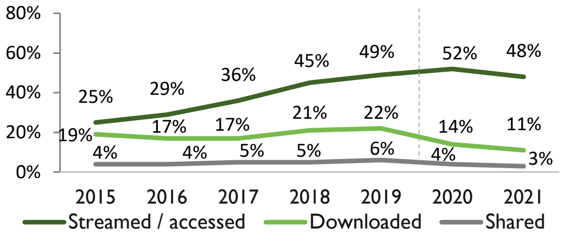
How is movie / film content consumed through the internet?

In the past 3 months:

48% **streamed / accessed** movies / films online

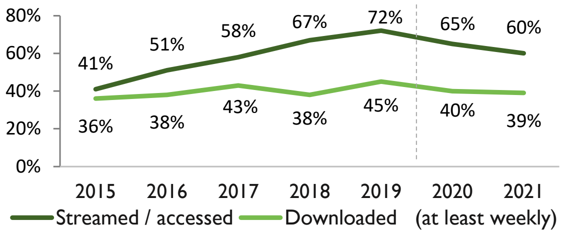
11% **downloaded** movies / films online

3% **shared** movies / films online



60% of those who **streamed / accessed** movies / films online did so **at least weekly**

39% of those who **downloaded** movies / films online did so **at least weekly**



Where are people going to consume movie / film content online?

In 2021, the top six sites or services used to consume movie / film content online were: (change since 2020 indicated in brackets)

- **72%** (+2pp) Netflix
- **29%** (-6pp) YouTube
- **23%** (+6pp) Amazon Prime
- **20%** (+7pp) Disney+
- **19%** (+2pp) Stan
- **17%** (0pp) SBS On Demand

In comparison, the top six sites or services used in 2015 were:

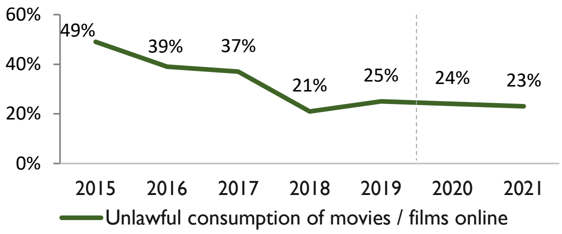
1. YouTube – 39%
2. Netflix – 16%
3. Apple – 16%
4. BitTorrent – 16%
5. Foxtel – 10%
6. SBS On Demand – 9%

How much movie / film content consumption online was unlawful?

23% consumed movies / films online in at least some **unlawful** ways

Of those who **streamed / accessed** movies / film **16%** did so unlawfully

Of those who **downloaded** movies / film online **70%** did so unlawfully



Compared to non-infringers, **infringers** were more likely to be:

- Male (62%)
- Aged 12 to 24 years (38%)

Compared to non-infringers, **infringers** were more likely to:

- Download (64%) and share (18%) movies / films online
- Use all sites / services to consume movies / films online (except Netflix and Stan)
- Unlawfully consume music (64%), TV programs (74%), sports (66%) and video games (66%) online

NOTE: Caution should be used when comparing 2020-21 results to previous years due to methodology changes (indicated by vertical dotted line in charts).

Chapter overview

This chapter presents the findings in relation to movie / film consumption online. Just over half of respondents had engaged with movies / films online in the past 3 months, most commonly through Netflix and YouTube. Overall engagement with movies / films online was lower than in 2020, and this was driven by lower levels of streaming / accessing and downloading movies / films.

As in 2020, around three-quarters of respondents consumed movies / films online lawfully (non-infringers). The remaining quarter consumed at least some movies / films unlawfully (infringers), though most also used lawful services to download / stream movies. Respondents were most likely to consume movies / films unlawfully when downloading, primarily via BitTorrent or a similar file sharing or peer to peer service.

Consumption behaviours

53% of respondents had **engaged with movies / films online in the past 3 months** (downloaded, streamed or shared) [9].

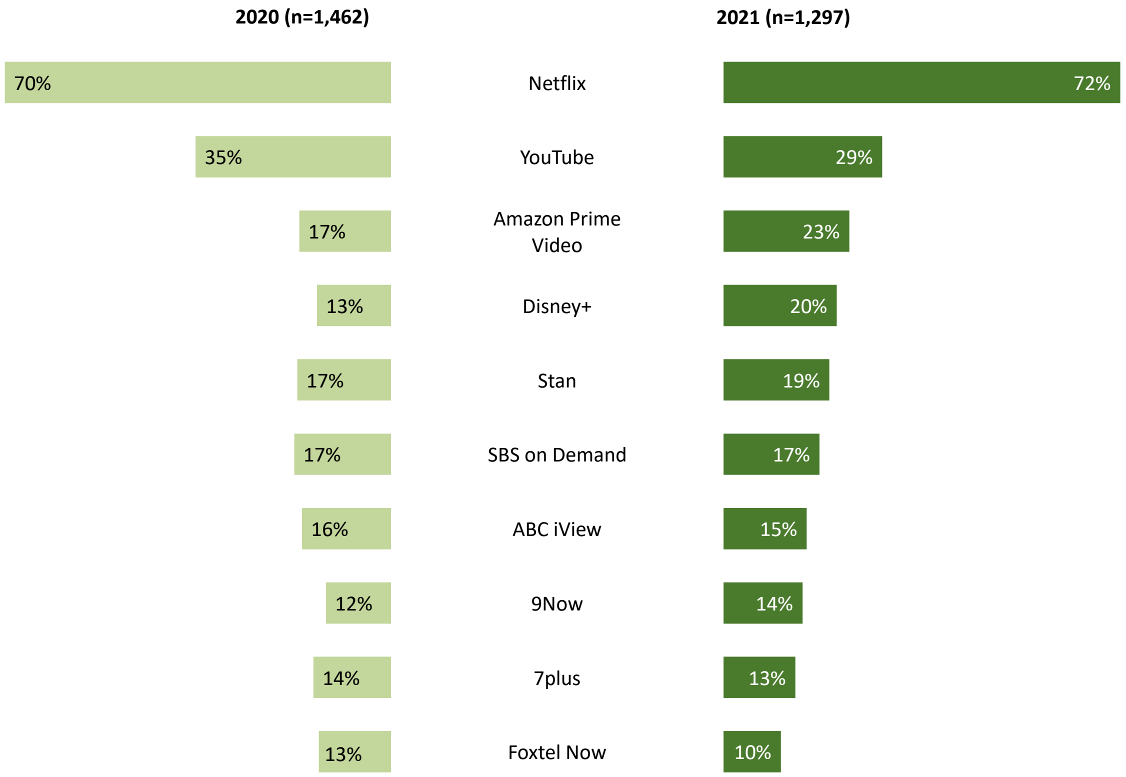
This was lower than the 59% reported in 2020, due to a decrease in the proportion of respondents who indicated that they streamed / accessed movies / films online (48% versus 52% in 2020) and downloaded movies / films online (11% versus 14%). In addition, 3% of respondents also reported sharing movies / films online, in line with 4% in 2020.

As illustrated in Figure 13 overleaf, the most commonly used sites and services were Netflix (72%) and YouTube (29%), though reported usage of YouTube decreased from 2020 levels. Usage of other subscription video-on-demand services (Amazon Prime Video, Disney+ and Stan) increased in 2021.

[9] Q12. In the past 3 months, which of the following have you streamed / accessed, downloaded, or shared through the internet? (n=2,388)

Figure 13: Top 10 services used to download, stream / access or share movies / films

Base: Respondents who had downloaded or streamed / accessed movies / films in the past 3 months



Q22. Which sites or services have you used in the past three months to download, stream / access, or share / upload movies / films through the internet? (Multiple response)

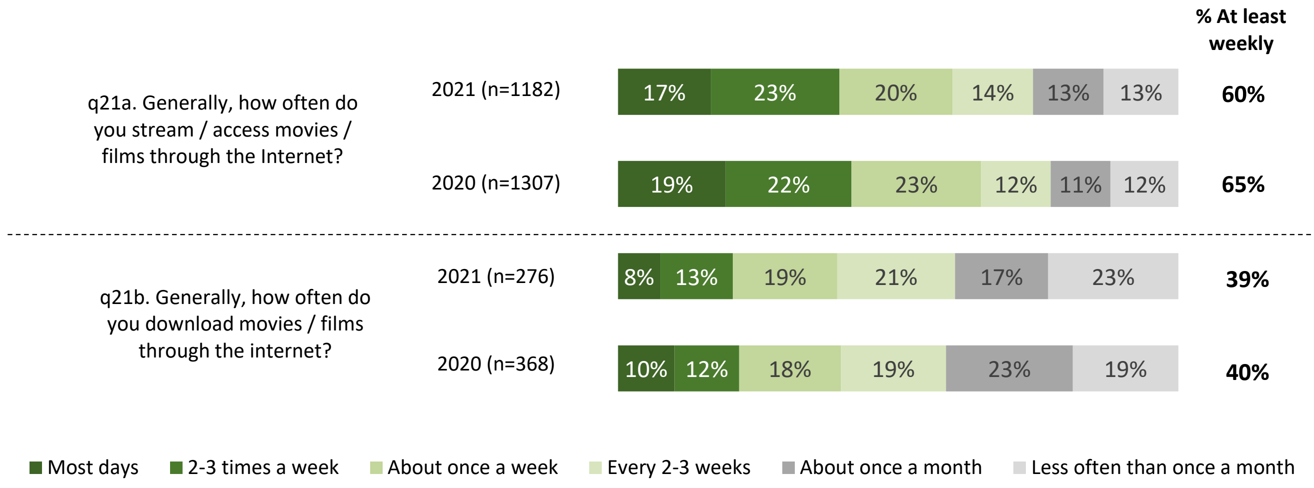
Frequency of consumption

As illustrated in Figure 14, 60% of those who streamed / accessed movies / films online did so at least weekly (equivalent to 28% of all respondents). This was down from 2020 levels (65%), consistent with the overall streaming behaviours outlined previously.

Movies / films were downloaded relatively less frequently, though this was still in line with 2020, with 39% of downloaders reporting that they downloaded movies / films at least weekly (4% of all respondents). Compared to respondents who streamed movie content or downloaded it less frequently, these respondents were more likely to be frequent consumers of all types of media, not just movies. They were also more likely to be younger, savvier about how to access content online, and more likely to consume content unlawfully. Positively however, they were also more concerned about consuming content in this way, and more likely to say they have taken steps to actively reduce their unlawful content consumption in the past five years.

Figure 14: Frequency of movie / film consumption

Base: Respondents who had downloaded or streamed / accessed movies / films in the past 3 months



Q21a. Generally, how often do you stream / access movies / films through the Internet? / Q21b. Generally, how often do you download movies / films through the internet?

As shown in Table 6 overleaf, the amount and frequency of movie / film consumption varied somewhat by age, gender, household income and employment status.

Respondents **aged between 12 and 34** reported the highest overall consumption of movies / films online, with this proportion declining with age. While this cohort recorded the highest downloading frequency, streaming was most frequent among those aged 25-34.

Overall consumption of movies / films online was higher among **males**, who were more likely than females to indicate that they downloaded movies / films online.

Those with a household income of **over $80,000** were most likely to consume and stream movies / films online.

By employment status, consumption of movies / films online was highest amongst students, followed by those working full-time, and those on a casual / contract basis.

Table 6: Consumption of movies / films online, by age, gender, household income and employment status, 2021

Base: All respondents, and respondents who had downloaded or streamed / accessed movies / films in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
Overall n=	2,392	1,192	1,200	531	400	438	407	327	289	576	579	839	759	293	111	107	135	332	148	140	395
Consume movies / films online	**53%**	**56%**	**50%**	**67%**	**67%**	**61%**	**47%**	**41%**	**31%**	**41%**	**52%**	**64%**	**60%**	**56%**	**59%**	**56%**	**54%**	**70%**	**52%**	**42%**	**33%**
Stream / access movies / films	**48%**	**49%**	**46%**	**57%**	**61%**	**57%**	**43%**	**38%**	**29%**	**36%**	**46%**	**60%**	**55%**	**51%**	**53%**	**54%**	**48%**	**60%**	**43%**	**36%**	**31%**
Download movies / films	**11%**	**14%**	**8%**	**21%**	**14%**	**10%**	**8%**	**5%**	**5%**	**8%**	**12%**	**13%**	**12%**	**10%**	**11%**	**7%**	**8%**	**21%**	**13%**	**11%**	**4%**
Streamed n=	1,182	609	573	304	244	250	174	125	85	215	275	512	417	154	58	58	67	201	65	52	127
2-3 times a week or more often	40%	41%	38%	44%	39%	38%	37%	40%	37%	39%	42%	42%	39%	41%	41%	42%	36%	41%	47%	40%	38%
About once every 1-3 weeks	35%	35%	34%	40%	38%	37%	33%	26%	24%	29%	32%	37%	37%	32%	32%	35%	38%	43%	33%	26%	24%
About once a month or less often	26%	24%	28%	16%	23%	25%	31%	35%	39%	33%	25%	21%	24%	27%	27%	23%	26%	17%	20%	34%	38%
Downloaded n=	276	171	105	114	56	45	32	16	13	51	71	119	97	29	12	8	11	71	19	16	18
2-3 times a week or more often	21%	22%	19%	31%	13%	22%	13%	13%	8%	21%	19%	24%	28%	10%	8%	49%	10%	24%	9%	19%	11%
About once every 1-3 weeks	40%	42%	36%	38%	50%	42%	35%	37%	23%	30%	38%	45%	44%	38%	50%	0%	29%	42%	57%	26%	29%
About once a month or less often	40%	36%	46%	31%	38%	36%	52%	50%	69%	48%	43%	31%	27%	52%	43%	51%	61%	35%	34%	55%	60%

Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.
Caution: low sample sizes for some groups, n=<10 suppressed (*).

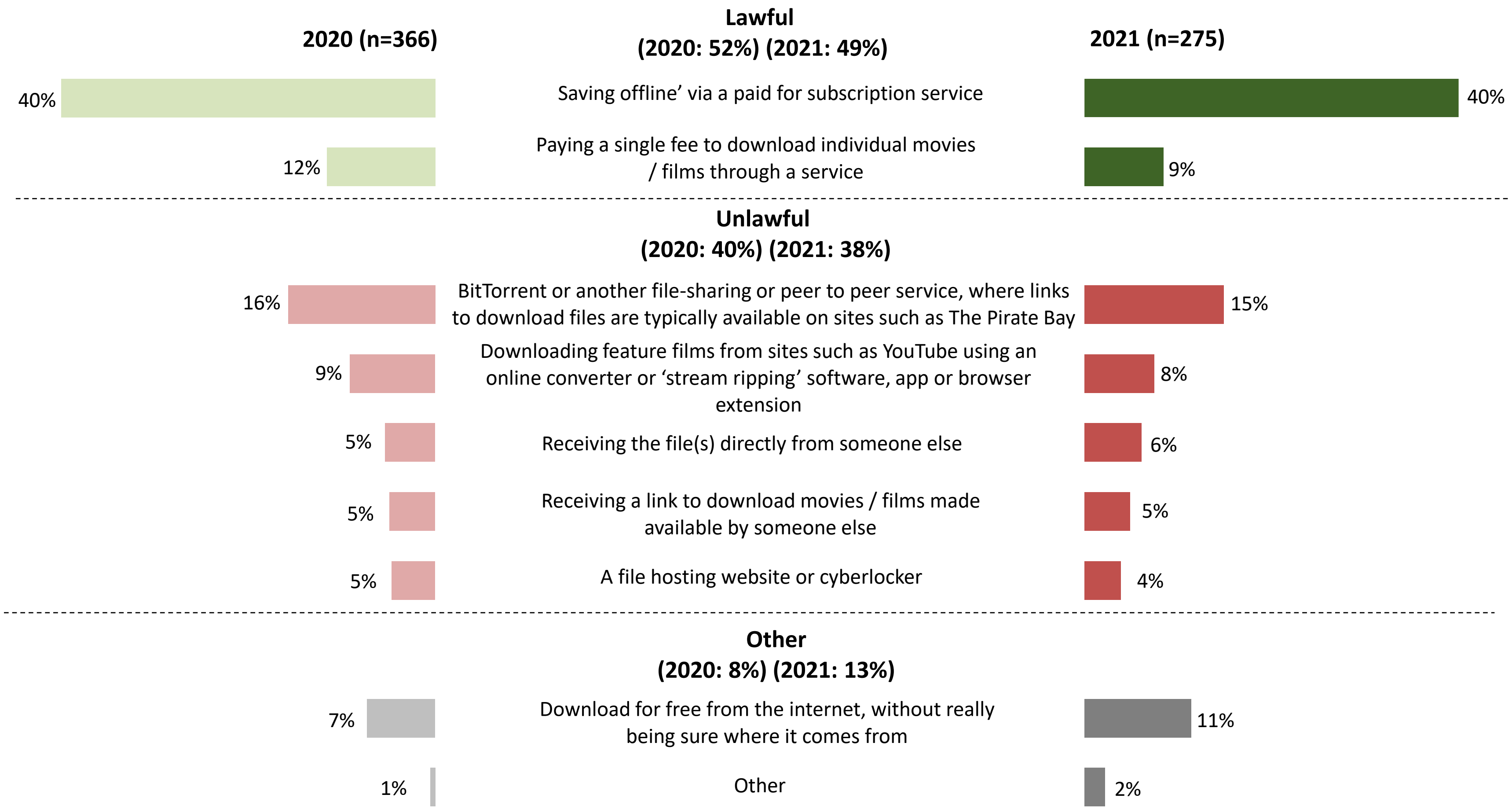
Sources of downloading movies / films

Respondents were asked to nominate the sources they typically used to download movies / films online and indicate the proportion of their time spent using each source. As illustrated in Figure 15 overleaf, usage was similar to that in 2020, with respondents reportedly using:

- lawful sources an average of 49% of the time; and
- unlawful sources an average of 38% of the time - most commonly BitTorrent or another file-sharing or peer to peer service (15%).

Figure 15: Average proportion of time spent downloading movies / films, by source[10]

Base: Respondents who had downloaded movies / films in the past 3 months



Q23. How is the way that you download movies / films typically split across the following? (Enter percentage of time for each option)[11]

[10] Results reflect the average proportion of time spent using each source identified by the respondent and does not factor in the actual amount of time spent downloading content.

[11] Survey respondents were intentionally not provided with the definition of these sources, in order to test their understanding of them. Respondents were asked to assume they did not use such technologies if they did not know what they were. A cyber locker is a third-party file hosting services that can be accessed over the internet. They provide storage a secure storage space for files / media / data online.

Based on their responses, respondents were classified into three consumer groups: using lawful sources only, using unlawful sources only, or using a mix of lawful and unlawful sources to download movies / films.[12]

51% used a **mix of lawful and unlawful** sources to download movies / films online (similar to 48% in 2020).

30% used **only lawful** sources to download movies / films online (comparable to 31% in 2020).

18% used **only unlawful** sources to download movies / films online (in line with 20% in 2020).

As shown in Table 7, movie / film downloading behaviours varied somewhat by age, household income and employment status.

The average proportion of time spent downloading movies / films **unlawfully** was highest among those **aged between 35 and 44** (on average 43% of the time), and lowest among those aged 65 and over (25% on average).

The average proportion of time spent using **unlawful sources** to download movies / films did not vary substantially by gender.

Those earning **over $80,000** reported a higher average proportion of time downloading movies / film from **lawful** sources, primarily due to higher usage of paid subscription services.

The average proportion of time spent using **unlawful** sources to download movies / film was highest among those who were **unemployed** (but looking for work), and lowest among those who were retired.

[12] Those who used only 'other' sources were excluded from this analysis.

Table 7: Average proportion of time spent downloading movies / films, by age, gender, household income and employment status, 2021

Base: Respondents who had downloaded movies / films in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
n=	276	171	105	114	56	45	32	16	13	51	71	119	97	29	12	8	11	71	19	16	18
Lawful	**49%**	**47%**	**52%**	**46%**	**54%**	**47%**	**52%**	**53%**	**43%**	**38%**	**44%**	**57%**	**52%**	**43%**	**48%**	*****	**49%**	**47%**	**41%**	**38%**	**59%**
'Saving offline' via a paid for subscription service	40%	40%	41%	38%	46%	34%	43%	46%	39%	31%	35%	48%	43%	36%	40%	*	35%	38%	35%	33%	53%
'Pay-per-view' / paying a single fee to download individual movies through services	9%	7%	10%	9%	7%	13%	9%	7%	4%	6%	10%	10%	9%	7%	8%	*	14%	9%	5%	5%	5%
Unlawful	**38%**	**38%**	**37%**	**41%**	**34%**	**43%**	**37%**	**33%**	**25%**	**39%**	**41%**	**34%**	**41%**	**25%**	**32%**	*****	**37%**	**40%**	**55%**	**47%**	**18%**
BitTorrent or another file-sharing or peer to peer service, where links to download files are typically available on sites such as The Pirate Bay	15%	16%	14%	8%	12%	25%	23%	23%	17%	15%	15%	14%	17%	5%	10%	*	3%	10%	36%	23%	9%
Downloading feature films from sites such as YouTube using an online converter or 'stream ripping' software, app or browser extension	8%	8%	8%	10%	5%	9%	7%	7%	1%	11%	9%	6%	8%	8%	4%	*	20%	7%	10%	14%	2%
Receiving a link to download movies made available by someone else	5%	5%	5%	7%	5%	3%	1%	2%	4%	4%	4%	6%	5%	2%	6%	*	7%	7%	2%	3%	4%
Receiving the file(s) directly from someone else	6%	6%	6%	10%	7%	3%	4%	0%	2%	8%	8%	4%	7%	6%	12%	*	3%	10%	3%	6%	1%
A file hosting website or cyberlocker	4%	4%	4%	5%	5%	2%	2%	1%	2%	2%	5%	4%	4%	4%	<1%	*	5%	6%	3%	1%	2%
Other	**13%**	**15%**	**11%**	**13%**	**12%**	**9%**	**11%**	**14%**	**32%**	**23%**	**15%**	**7%**	**7%**	**32%**	**19%**	*****	**15%**	**13%**	**5%**	**15%**	**23%**
Download for free from the internet, without really being sure where it comes from	11%	13%	9%	13%	11%	7%	11%	8%	20%	19%	11%	8%	7%	23%	19%	*	10%	12%	5%	15%	16%
Other	2%	2%	2%	0%	2%	2%	0%	6%	12%	5%	3%	<1%	1%	8%	0%	*	5%	1%	0%	0%	8%

Q23. How is the way that you download movies / films typically split across the following? (Enter % of time for each). Caution low sample sizes for some groups, n=<10 suppressed (*).

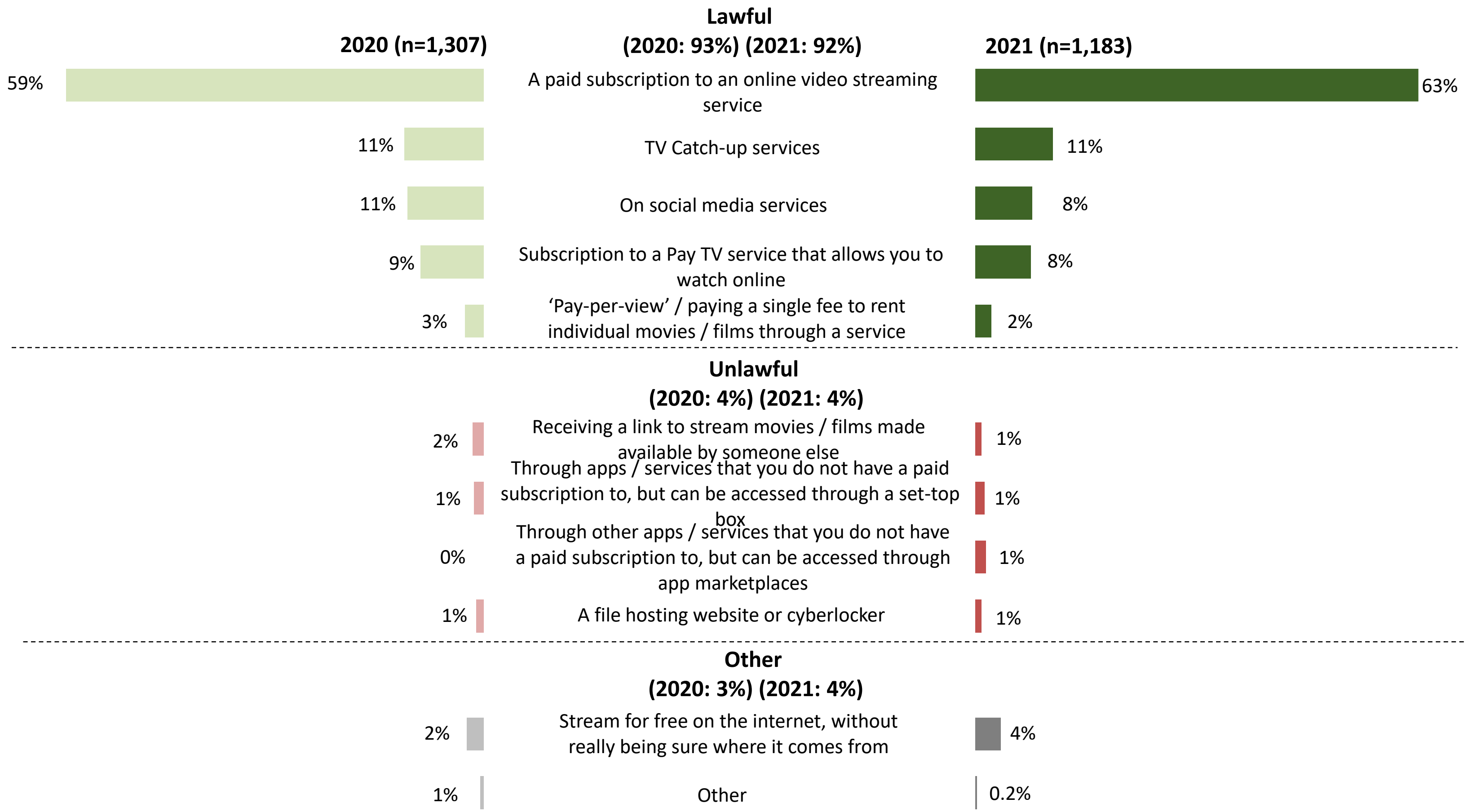
Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.
Caution: low sample sizes for some groups, n=<10 suppressed (*).

Sources of streaming movies / films

Nearly all respondents indicated that they streamed movies / films through lawful sources (92%, in line with 93% in 2020), most commonly via a paid subscription services (63%, up from 59% in 2020 – see Figure 16).

Figure 16: Average proportion of time spent streaming movies / films, by source[13]

Base: Respondents who had streamed / accessed movies / films in the past 3 months



Q24. How is the way you stream movies / films typically split across the following? (Enter percentage of time for each option) [14]

[13] Results reflect the average proportion of time spent using each source identified by the respondent and does not factor in the actual amount of time spent streaming content.

[14] Survey respondents were intentionally not provided with the definition of these sources, in order to test their understanding of them. Respondents were asked to assume they did not use such technologies if they did not know what they were. A cyber locker is a third-party file hosting services that can be accessed over the internet. They provide storage a secure storage space for files / media / data online.

Respondents were once again classified into three consumer groups: using lawful sources only, using unlawful sources only, or using a mix of lawful and unlawful sources to stream movies / films.[15]

84% of respondents who streamed movies / films **only did so lawfully** (comparable to 86% in 2020). A small proportion (15%, similar to 13% in 2020) used a mix of lawful and unlawful sources to stream movies / films online, while just 1% of respondents used only unlawful sources (as in 2020).

Movie / film streaming behaviours varied somewhat by age. There were not substantial differences by other demographics (see Table 8).

The vast majority of respondents across all age groups streamed movies / films lawfully (over 90% of the time, on average). Compared to older age groups, respondents aged **12 to 24** were slightly more likely to report using **unlawful** sources to stream movies / films, while usage of TV catch-up services generally increased with age.

The average proportion of time spent using lawful and unlawful services to stream movies / films did not vary substantially by gender, though **females** were more likely to use paid subscription services (67% versus 59% of males).

Proportional usage of lawful and unlawful sources to stream movies / films online was similar across all household income levels. However, those earning **below $40,000** were less likely to use paid subscription services compared to those with a household income over $80,000 (55% versus 65%).

The average proportion of time streaming movies / films lawfully and unlawfully was broadly similar across respondents of different employment statuses.

[15] Those who used only 'other' sources were excluded from this analysis.

Table 8: Average proportion of time spent streaming movies / films, by age, gender, household income and employment status, 2021

Base: Respondents who had streamed / accessed movies / films in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
n=	1,182	609	573	304	244	250	174	125	85	215	275	512	417	154	58	58	67	201	65	52	127
Lawful	**92%**	**90%**	**94%**	**89%**	**92%**	**93%**	**93%**	**94%**	**92%**	**88%**	**93%**	**93%**	**92%**	**93%**	**92%**	**95%**	**98%**	**90%**	**89%**	**90%**	**91%**
A paid for subscription service	63%	60%	67%	60%	66%	66%	61%	64%	59%	56%	63%	66%	64%	63%	68%	70%	74%	59%	61%	64%	59%
TV catch-up services	11%	10%	11%	8%	7%	8%	14%	14%	19%	13%	11%	9%	9%	13%	8%	12%	8%	9%	8%	8%	17%
On social media services	8%	10%	6%	10%	8%	8%	7%	6%	8%	9%	10%	6%	8%	7%	3%	8%	5%	11%	10%	13%	7%
Subscription to Pay TV services that allows you to watch online	8%	9%	7%	8%	7%	8%	9%	8%	6%	7%	8%	9%	8%	8%	11%	3%	9%	8%	7%	5%	7%
'Pay-per-view' / paying a single fee to rent individual movies / films through a service	2%	2%	3%	3%	3%	3%	2%	1%	<1%	3%	2%	2%	3%	2%	1%	2%	2%	3%	2%	<1%	1%
Unlawful	**4%**	**5%**	**4%**	**7%**	**4%**	**3%**	**4%**	**2%**	**5%**	**4%**	**5%**	**5%**	**5%**	**4%**	**2%**	**1%**	**1%**	**6%**	**8%**	**5%**	**5%**
Receiving a link to stream movies / films made available by someone else	1%	1%	1%	2%	1%	1%	0%	1%	0%	1%	1%	1%	1%	1%	1%	<1%	<1%	1%	2%	<1%	0%
Through apps / services without paid subscription, but can be accessed through a set-top box	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	<1%	<1%	0%	3%	2%	2%	1%
Through other apps / services without paid subscription, but accessed through marketplaces	1%	2%	1%	2%	1%	1%	1%	0%	3%	2%	2%	1%	1%	1%	1%	1%	<1%	1%	3%	2%	3%
A file hosting website or cyberlocker	1%	1%	1%	1%	1%	1%	1%	0%	0%	1%	1%	1%	1%	1%	<1%	<1%	0%	1%	2%	<1%	0%
Other	**4%**	**5%**	**3%**	**4%**	**4%**	**3%**	**4%**	**5%**	**3%**	**8%**	**3%**	**3%**	**3%**	**3%**	**6%**	**3%**	**2%**	**4%**	**4%**	**5%**	**4%**
Stream for free from the internet, without really being sure where it comes from	4%	5%	2%	4%	4%	3%	3%	5%	3%	7%	3%	3%	3%	2%	6%	3%	0%	4%	4%	5%	4%
Other	<1%	<1%	<1%	<1%	0%	<1%	1%	0%	0%	1%	0%	<1%	<1%	1%	<1%	0%	1%	0%	0%	0%	0%

Q24. How is the way you stream movies / films typically split across the following? (Enter % of time for each). Caution low sample sizes for some groups. Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.
Caution: low sample sizes for some groups, n=<10 suppressed (*).

Behaviour change: sources of downloading / streaming movies / films

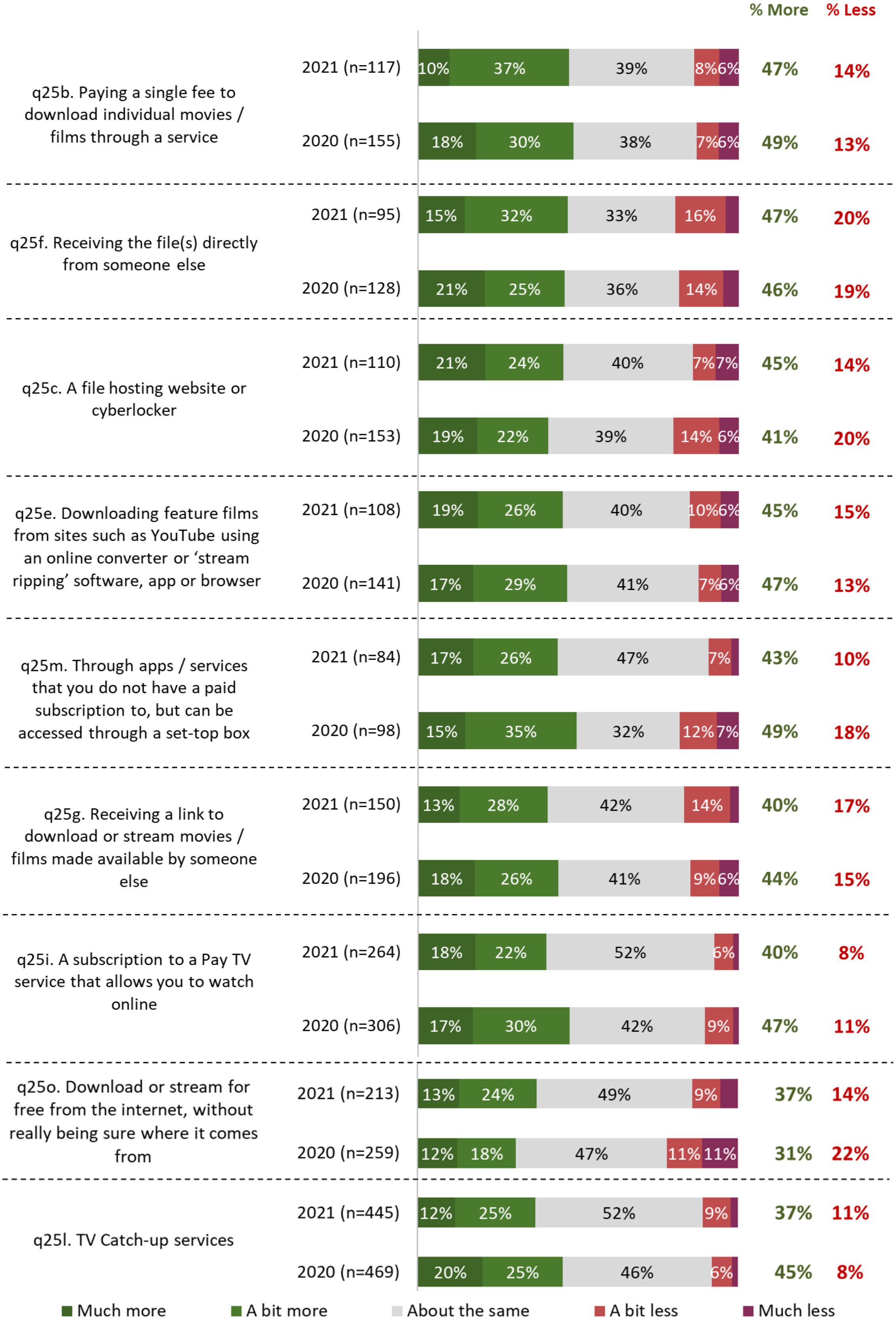
In order to explore any changes in behaviour over time, respondents were asked whether they were using various sources more, less, or about the same as this time one year ago. As illustrated in Figure 17 overleaf, respondent behaviour was broadly similar to 2020 for most sources, with respondents reporting that:

- at least 30% of respondents had used all sources 'much' or 'a bit' **more** compared to the same time last year (as in 2020);
- 33%-58% of respondents had used each source **about the same** amount (broadly similar to 32%-52% in 2020); and
- few respondents had used each source 'much' or 'a bit' **less** (8%-20% of respondents per source, in line with 7%-22% in 2020).

In 2021, respondents were most likely to report that they were using streaming via a paid subscription to an online video streaming service (58%) and using social media services (57%) about the same amount. Compared to 2020, respondents were more likely to report stable usage of paid services in general, and less likely to report using these services more.

Figure 17: Change in usage of sources to download / stream movies / films

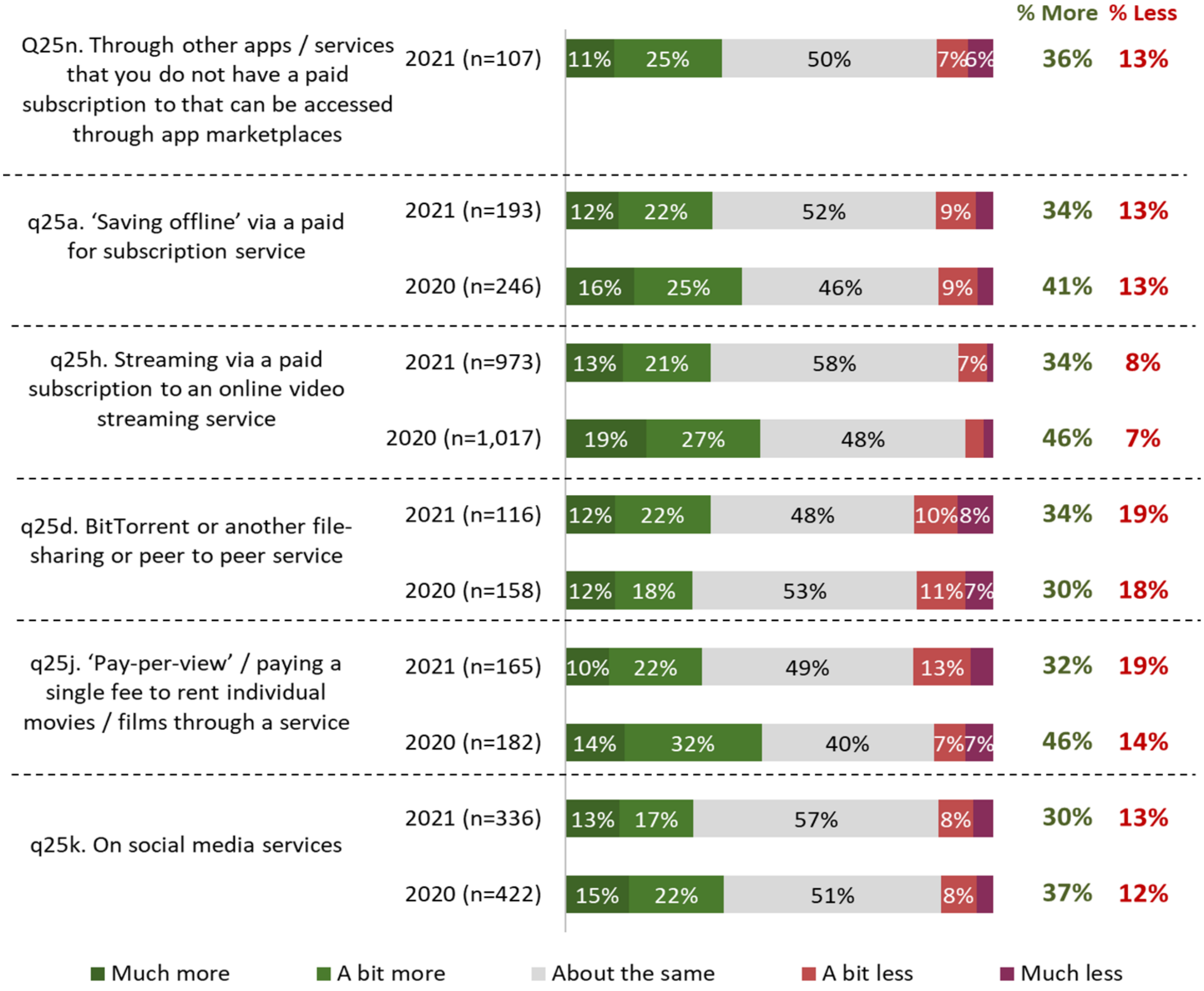
Base: Respondents who had used each source in the past 3 months



Q25. Overall, compared to this time last year, how often are you using these method(s) to access movies / films?

Figure 17 (continued): Change in usage of sources to download / stream movies / films

Base: Respondents who had used each source in the past 3 months



Q25. Overall, compared to this time last year, how often are you using these method(s) to access movies / films?

Those who indicated they were using a particular method more (n=544) were asked about their reasons for doing so. The top three reasons cited by respondents were the same as those provided last year, and included:

- having more time to watch movies / films, for example due to the impacts of the COVID-19 pandemic (24%);
- better access to a range of content (16%); and
- greater convenience / easier access (15%).

Also reflecting reasons mentioned in 2020, those who indicated they were using a particular method less (n=242) most commonly reported this was because:

- they were less interested in movies / films at the moment (34%);
- they were now using a paid service / subscription / app (10%); and
- there was not enough interesting content / variety (12%).

Profile of movie / film infringers

Of those who consumed movies / films online (both downloaded and streamed / accessed), 77% did so lawfully (non-infringers) (comparable to 76% in 2020).

23% consumed movies / films in at least some **unlawful** ways (infringers) (similar to 24% in 2020) – 21% through a mix of lawful and unlawful sources (consistent with 20% in 2020), and 3% via unlawful sources only (in line with 4% in 2020).

Table 9 illustrates several key demographic and behavioural differences between the two groups of consumers (infringers and non-infringers of movies).

Table 9: Profile of movie / film infringers versus non-infringers

77% Non-infringers (all activities lawful) Base: Respondents who consumed movies / films online lawfully only (n=967)	23% Infringers (some / all activities unlawful) Base: Respondents who consumed movies / films online unlawfully (n=310)
Compared to infringers, non-infringers were more likely to be:	Compared to non-infringers, infringers were more likely to be:
Female (52%)	Male (62%)
Aged 35 years and over (57%)	Aged 12 to 24 years (38%)
No substantial differences by household income	No substantial differences by household income
Retired (14%)	Student (22%)
And were more likely to report:	And were more likely to report:
Streaming / accessing movies / films online (97%)	Downloading (64%) and sharing (18%) movies / films online
Using Netflix (77%) and Stan (20%)	Using all sites / services (other than Netflix and Stan)
	Unlawfully consuming other content: music (64%), TV programs (74%), sports (66%) and video games (66%)

*Excludes don't know and prefer not to say

VII. TV Programs

TV programs

Content consumption summary (2021)

57% (-5pp) of all respondents **consumed** TV program content online in 2021

80% (0pp) of TV program consumers accessed all TV content **lawfully**

20% (0pp) of TV program consumers accessed some TV content **unlawfully**

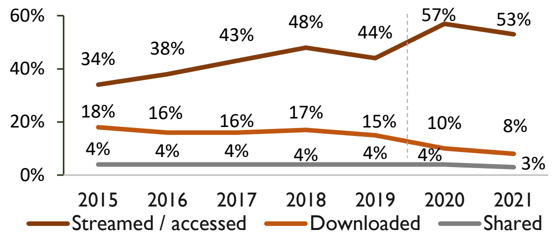
How is TV program content consumed through the internet?

In the past 3 months:

53% **streamed / accessed** TV programs online

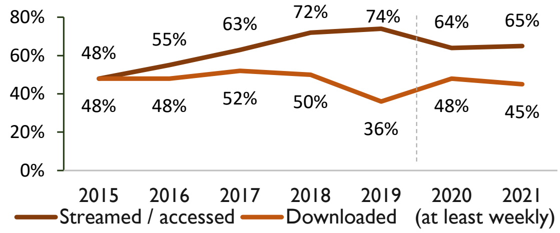
8% **downloaded** TV programs online

3% **shared** TV programs online



65% of those who **streamed / accessed** TV programs online did so **at least weekly**

45% of those who **downloaded** TV programs online did so **at least weekly**



Where are people going to consume TV program content online?

In 2021, the top six sites or services used to consume TV program content online were (change since 2020 indicated in brackets):

58% (-1pp) Netflix

26% (-4pp) YouTube

23% (0pp) ABC iView

22% (+4pp) 9Now

22% (-1pp) 7plus

21% (-1pp) SBS On Demand

In comparison, the top six sites or services used in 2015 were:

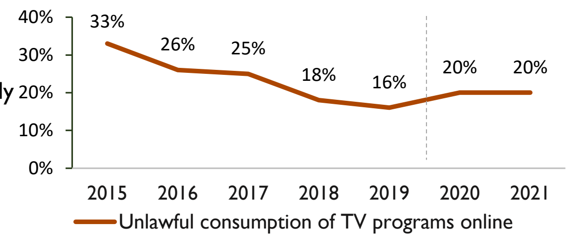
1. YouTube – 32%
2. ABC – 21%
3. 10 play – 19%
4. 7plus – 18%
5. SBS On Demand – 16%
6. 9Now – 15%

How much TV program content consumption online was unlawful?

20% consumed TV programs online in at least some **unlawful** ways

Of those who **streamed / accessed** TV programs online **14%** did so unlawfully

Of those who **downloaded** TV programs online **63%** did so unlawfully



Compared to non-infringers, **infringers** were more likely to be:

- Male (61%)
- Aged 12 to 24 years (36%)

Compared to non-infringers, **infringers** were more likely to:

- Download (48%) and share (15%) TV programs online
- Use many sites / services to consume TV programs online (except Netflix)
- Unlawfully consume music (61%), movies (82%), sports (70%) and video games (67%) online

NOTE: Caution should be used when comparing 2020-21 results to previous years due to methodology changes (indicated by vertical dotted line in charts).

ORIMA RESEARCH

Chapter overview

This chapter presents the findings in relation to TV program consumption online. Just under three-in-five respondents had engaged with TV programs online in the past 3 months, most commonly through Netflix and YouTube. Engagement with TV programs online was lower than in 2020, mainly due to a decrease in reported streaming behaviours.

Consistent with 2020, four-in-five respondents consumed TV programs lawfully (non-infringers), while the remaining one-in-five consumed at least some TV programs through unlawful sources (infringers). Of those that did consume at least some TV programs unlawfully, the majority also did so through lawful sources. Respondents were most likely to use unlawful sources when downloading TV programs, primarily through BitTorrent or a similar file-sharing or peer to peer service.

Consumption behaviours

57% of respondents had **engaged with TV programs online in the past 3 months** (downloaded, streamed or shared)[16], lower than the 62% reported in 2020.

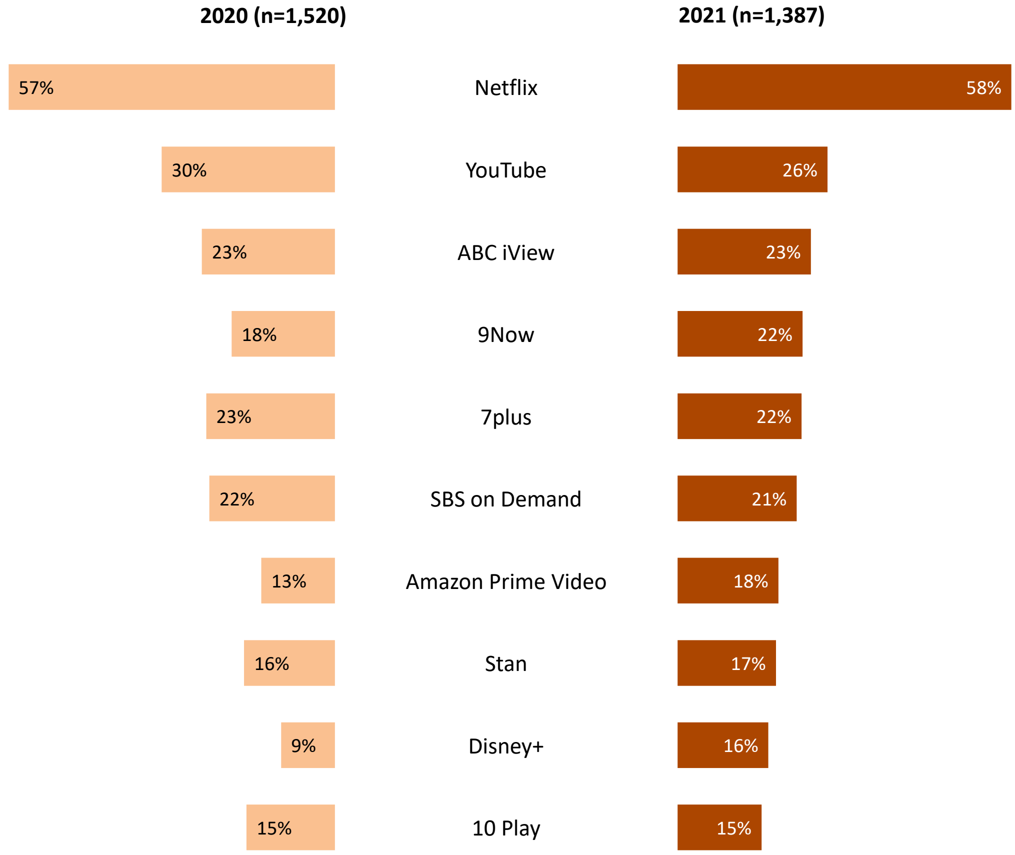
Overall, respondents were mostly likely to engage with TV programs online through streaming (53% of all respondents, a decrease from 57% in 2020), with a smaller proportion of respondents downloading (8%, in line with 10% in 2020) and sharing (3%, similar to 4% in 2020).

As in 2020, respondents primarily used Netflix (58%) and YouTube (26%) to consume TV programs online (see Figure 18), though respondents were less likely to report using YouTube than in 2020. Rather, reported usage of 9Now, Amazon Prime Video and Disney+ was higher in 2021.

[16] Q12. In the past 3 months, which of the following have you streamed / accessed, downloaded, or shared through the internet? (n=2,388)

Figure 18: Top 10 services used to download, stream / access or share TV programs

Base: Respondents who had downloaded or streamed / accessed TV programs in the past 3 months



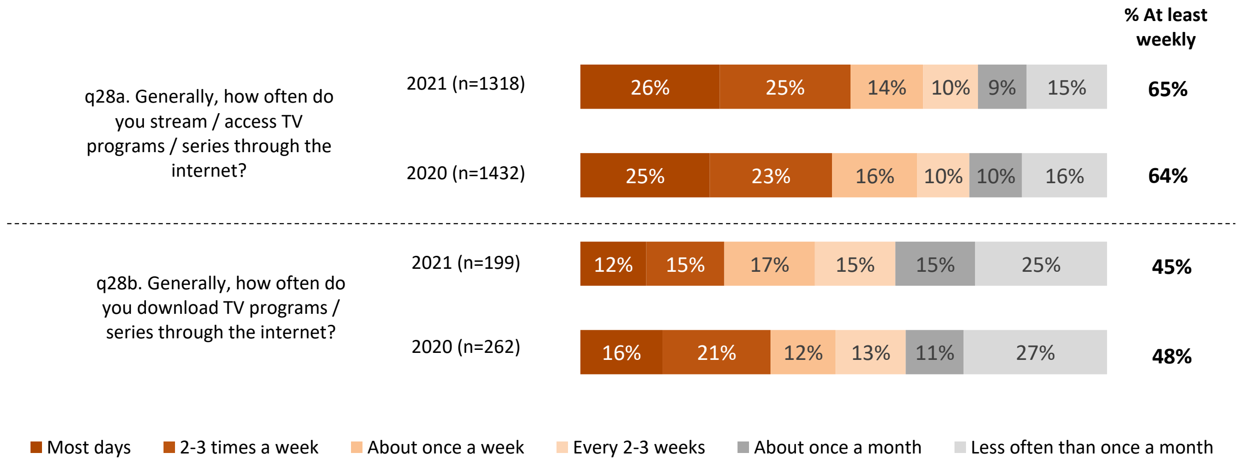
Q29. Which sites or services have you used in the past 3 months to download, stream / access, or share TV programs / series through the internet? (Multiple response)

Frequency of consumption

65% of those who streamed / accessed TV programs did so at least weekly (similar to 64% in 2020 – see Figure 19), amounting to 35% of all respondents. A lower proportion of respondents indicated that they downloaded TV programs at least weekly, with 45% reporting doing so (similar to 48% in 2020), equivalent to 4% of all respondents.

Figure 19: Frequency of TV program consumption

Base: Respondents who had downloaded or streamed / accessed TV programs in the past 3 months



Q28a. Generally, how often do you stream / access TV programs / series through the internet? / Q28b. Generally, how often do you download TV programs / series through the internet?

The amount and frequency of TV program consumption varied somewhat by age, gender, household income and employment status (see Table 10 below).

Those **aged between 12 and 44** reported the highest frequency of consuming TV programs online, and this generally declined with age.

By gender, consumption of TV programs online was **similar** among males and females, though males were slightly more likely to download TV programs.

Overall consumption of TV programs online was the highest for those with a household income of **over $80,000**. These respondents were also most likely to report streaming TV programs online.

By employment status, **students** reported the highest overall consumption of TV programs online, followed by those who were self-employed and those who were working casually / on contract.

Table 10: Consumption of TV programs online, by age, gender, household income and employment status, 2021

Base: All respondents, and respondents who had downloaded or streamed / accessed TV programs in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
Overall n=	2,392	1,192	1,200	531	400	438	407	327	289	576	579	839	759	293	111	107	135	332	148	140	395
Consume TV programs online	**57%**	**58%**	**56%**	**67%**	**69%**	**67%**	**55%**	**47%**	**37%**	**46%**	**55%**	**69%**	**62%**	**62%**	**64%**	**65%**	**60%**	**70%**	**55%**	**47%**	**40%**
Stream / access TV programs	**53%**	**53%**	**53%**	**61%**	**64%**	**64%**	**52%**	**45%**	**34%**	**43%**	**50%**	**66%**	**58%**	**58%**	**64%**	**62%**	**59%**	**62%**	**52%**	**45%**	**37%**
Download TV programs	**8%**	**11%**	**6%**	**12%**	**10%**	**8%**	**5%**	**4%**	**7%**	**6%**	**9%**	**10%**	**9%**	**10%**	**4%**	**4%**	**6%**	**11%**	**12%**	**8%**	**6%**
Streamed n=	1,318	650	668	322	256	282	214	146	98	261	304	556	439	173	71	67	81	205	78	67	153
2-3 times a week or more often	51%	50%	53%	48%	54%	55%	55%	47%	47%	48%	51%	56%	50%	55%	53%	54%	55%	50%	49%	53%	50%
About once every 1-3 weeks	24%	28%	21%	30%	28%	23%	21%	24%	14%	22%	21%	25%	28%	23%	17%	22%	22%	27%	35%	22%	15%
About once a month or less often	24%	22%	27%	23%	18%	22%	23%	29%	40%	30%	28%	19%	21%	22%	30%	24%	23%	23%	17%	25%	35%
Downloaded n=	199	126	73	67	42	34	22	14	20	37	53	80	72	28	4	5	8	37	17	12	21
2-3 times a week or more often	27%	26%	30%	40%	24%	30%	36%	5%	10%	26%	25%	32%	32%	12%	*	*	*	27%	40%	42%	11%
About once every 1-3 weeks	32%	30%	36%	31%	38%	26%	36%	36%	30%	21%	34%	35%	39%	28%	*	*	*	41%	37%	24%	16%
About once a month or less often	40%	44%	34%	29%	38%	44%	27%	58%	60%	53%	41%	33%	29%	59%	*	*	*	33%	23%	34%	74%

Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.
Caution: low sample sizes for some groups, n=<10 suppressed (*).

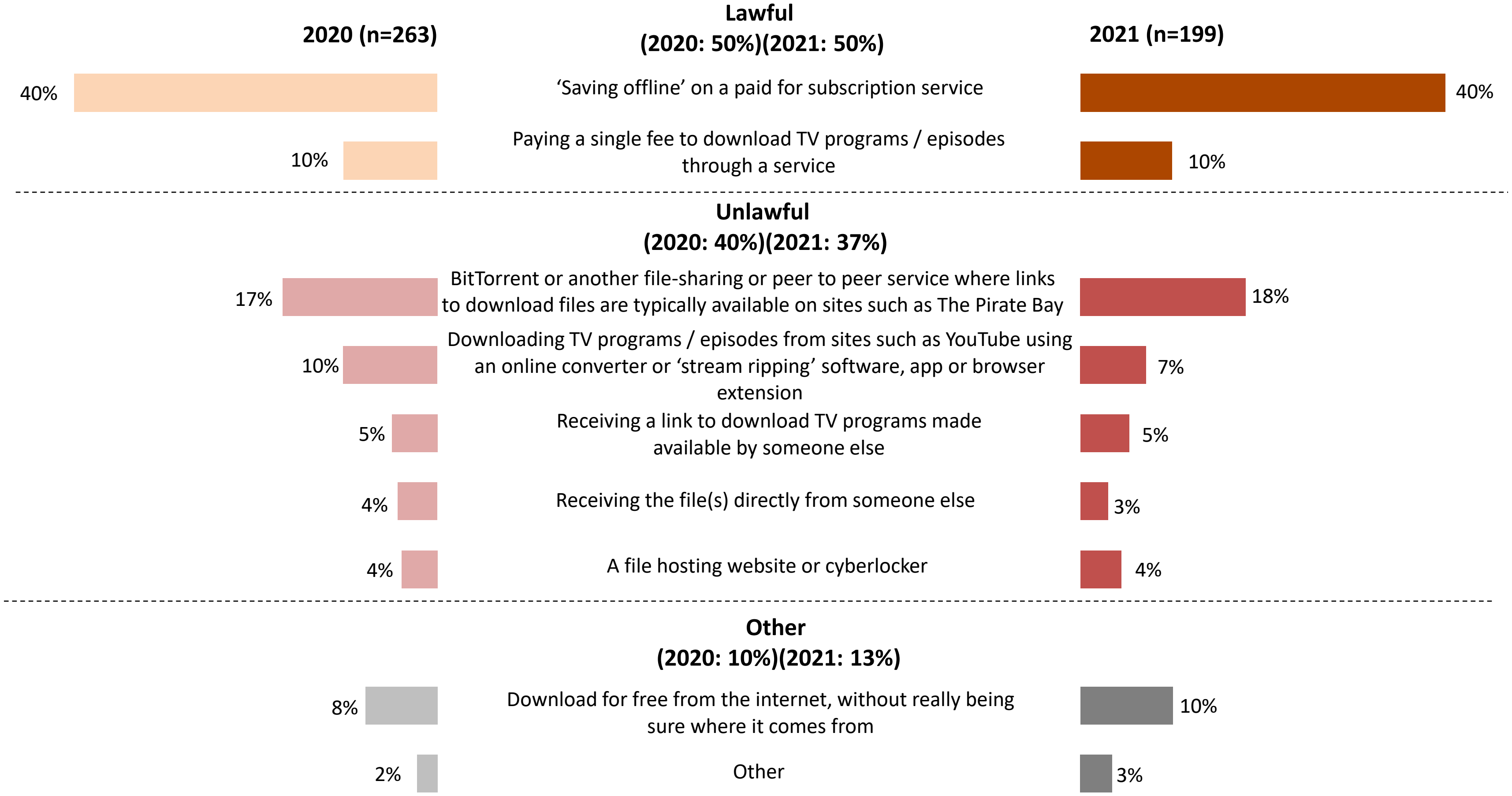
Sources of downloading TV programs

Respondents were asked to nominate the sources they typically used to download TV programs online and indicate the proportion of their time spent using each source. As shown in Figure 20 overleaf, reported usage across sources was similar to 2020, with respondents indicating that they used:

- lawful sources an average of 50% of the time; and
- unlawful sources an average of 37% of the time – most commonly via BitTorrent or another file-sharing or peer to peer service (18%).

Figure 20: Average proportion of time spent downloading TV programs, by sources[17]

Base: Respondents who had downloaded TV programs in the past 3 months



Q30. How is the way that you download TV programs typically split across the following? (Enter percentage of time for each option) [18]

[17] Results reflect the average proportion of time spent using each source identified by the respondent and does not factor in the actual amount of time each respondent spent downloading content.

[18] Survey respondents were intentionally not provided with the definition of these sources, in order to test their understanding of them. Respondents were asked to assume they did not use such technologies if they did not know what they were. A cyber locker is a third-party file hosting services that can be accessed over the internet. They provide storage a secure storage space for files / media / data online.

Based on their responses, respondents were classified into three consumer groups: using lawful sources only, using unlawful sources only, or using a mix of lawful and unlawful sources to download TV programs.[19]

41% downloaded TV programs online using a **mix of lawful and unlawful** sources (in line with 40% in 2020), while just over one fifth (22%, broadly in line with 25% in 2020) used only unlawful services. Over a third (37%, comparable to 35% in 2020) of respondents who downloaded TV programs online did so from only lawful sources.

Those who said that they had downloaded TV programs for free without really being sure where it comes from (10%) were asked to describe how or where they had obtained it. A broad range of responses were provided, and most common themes included:

- via Google search / search engine (34%); and
- receiving assistance from a friend or family member to access / download content (23%).

As illustrated in Table 11, TV program downloading behaviours varied somewhat by age, household income and employment status.

Respondents **aged between 45 and 54** reported the highest average proportion of time downloading TV programs from **unlawful** sources (48% on average).

On average, the proportion of time spent using **unlawful sources** to download TV programs was broadly similar between **males and females**.

Though results did not vary substantially by household income, those earning less than **$40,000** spent a less time on average using unlawful sources to download TV programs compared to those earning more.

The average proportion of time spent using downloading TV programs unlawfully was highest among those who were **unemployed and not looking for work**.

[19] Those who used only 'other' sources were excluded from this analysis.

Table 11: Average proportion of time spent downloading TV programs, by age, gender, household income and employment status, 2021

Base: Respondents who had downloaded TV programs in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 – $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for	Unemployed (not looking for	Retired
n=	199	126	73	67	42	34	22	14	20	37	53	80	72	28	4	5	8	37	117	12	21
Lawful	**50%**	**47%**	**55%**	**59%**	**47%**	**47%**	**41%**	**47%**	**44%**	**48%**	**44%**	**55%**	**45%**	**53%**	*	*	*	**58%**	**47%**	**43%**	**49%**
'Saving offline' on a paid for subscription service	40%	36%	46%	50%	40%	41%	25%	31%	32%	35%	33%	46%	37%	41%	*	*	*	48%	40%	42%	38%
Paying a single fee to download TV programs / episodes through a service	10%	11%	9%	10%	7%	7%	16%	16%	11%	13%	11%	9%	8%	13%	*	*	*	10%	8%	1%	11%
Unlawful	**37%**	**38%**	**34%**	**33%**	**38%**	**44%**	**48%**	**33%**	**30%**	**30%**	**39%**	**36%**	**44%**	**29%**	*	*	*	**34%**	**44%**	**51%**	**26%**
BitTorrent or another file-sharing or peer to peer service where links to download files are typically available on sites such as The Pirate Bay	18%	17%	18%	9%	13%	32%	25%	26%	16%	11%	21%	17%	18%	18%	*	*	*	10%	33%	24%	11%
Downloading TV programs / episodes from sites such as YouTube using online converter, 'stream ripping' software, app or browser extension	7%	8%	6%	8%	9%	6%	12%	0%	5%	8%	5%	8%	9%	3%	*	*	*	8%	2%	18%	6%
Receiving a link to download TV programs made available by someone else	5%	6%	4%	7%	8%	2%	7%	3%	2%	4%	6%	6%	8%	3%	*	*	*	7%	3%	1%	3%
A file hosting website or cyberlocker	3%	2%	3%	4%	3%	2%	3%	0%	0%	3%	2%	2%	3%	1%	*	*	*	3%	2%	5%	<1%
Receiving the file(s) directly from someone else	4%	5%	4%	5%	4%	3%	2%	4%	7%	3%	4%	4%	6%	3%	*	*	*	6%	3%	3%	7%
Other	**13%**	**15%**	**11%**	**8%**	**15%**	**9%**	**10%**	**20%**	**26%**	**22%**	**18%**	**9%**	**12%**	**18%**	*	*	*	**7%**	**9%**	**6%**	**25%**
Download for free from the internet, without really being sure where it comes from	10%	12%	7%	8%	15%	6%	10%	9%	11%	12%	15%	8%	10%	16%	*	*	*	7%	9%	6%	9%
Other	3%	3%	4%	0%	0%	2%	0%	11%	15%	10%	3%	1%	2%	2%	*	*	*	0%	0%	0%	16%

Q30. How is the way that you download TV programs typically split across the following? (Enter % of time for each option).

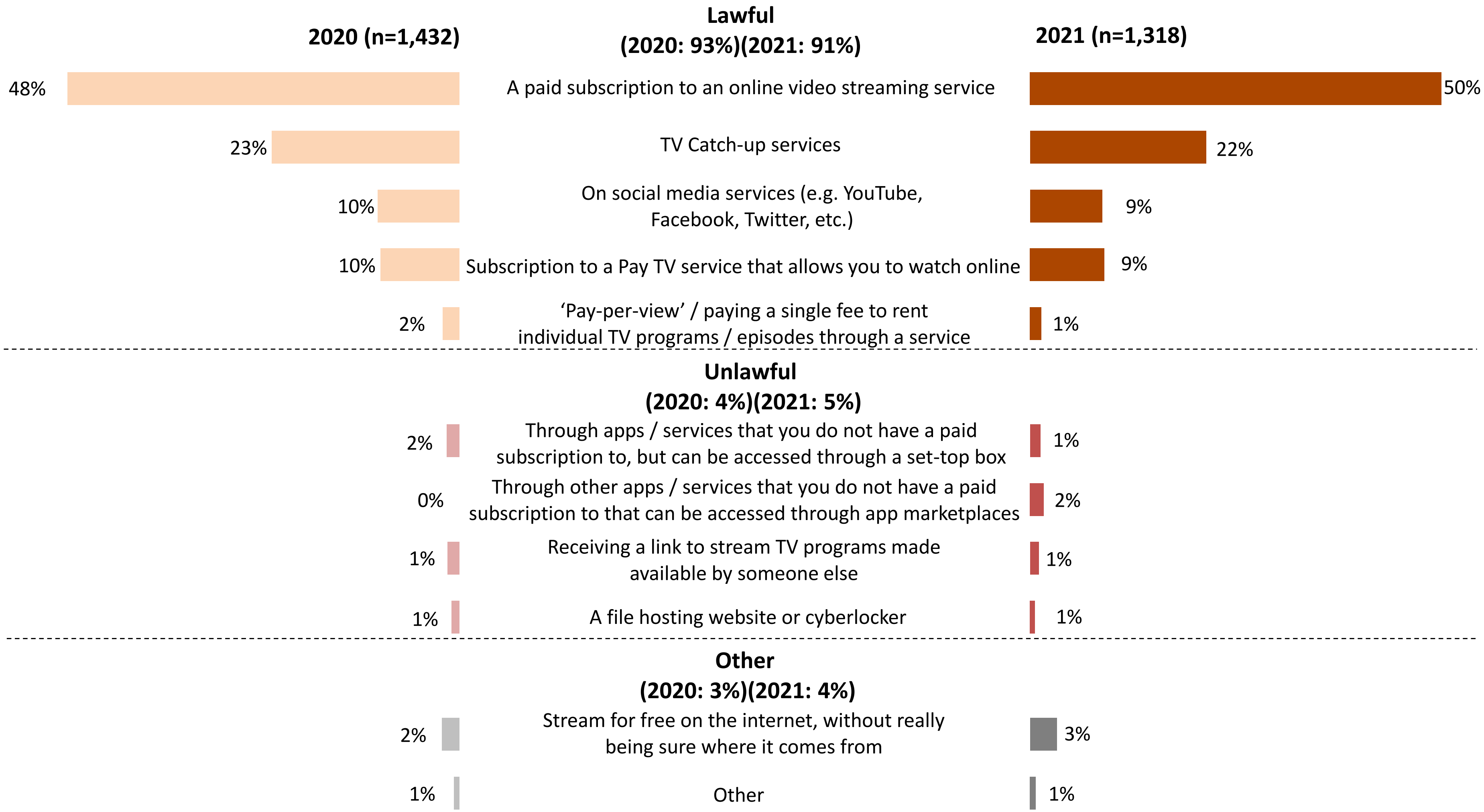
Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.
Caution: low sample sizes for some groups, n=<10 suppressed (*).

Sources of streaming TV programs

In 2021, the vast majority of respondents streamed TV programs lawfully (91%, in line with 93% in 2020 – see Figure 21). Paid subscriptions services were similarly the main way respondents streamed TV programs (50%, comparable to 48% in 2020), though just under a quarter also used TV catch-up services (22%, consistent with 23% in 2020).

Figure 21: Average proportion of time spent streaming TV programs, by source[20]

Base: Respondents who had streamed / accessed TV programs in the past 3 months



Q32. How is the way you stream TV programs typically split across the following? (Enter percentage of time for each option)[21]

Respondents were once again classified into three consumer groups: using lawful sources only, using unlawful sources only, or using a mix of lawful and unlawful sources to stream TV programs.[22]

86% of respondents used **only lawful sources** to stream TV programs (similar to 87% in 2020). 14% of respondents who streamed TV programs did so using a mix of lawful and unlawful sources (unchanged from 2020), while just 1% reported only streaming TV programs unlawfully (consistent with 2020).

TV program streaming behaviours varied somewhat by age, household income and employment status (see Table 12).

Proportional usage of lawful services was high across all age groups (around 90% on average), though reported usage of **unlawful sources** was slightly higher for respondents **aged between 12 and 24**.

By gender, males and females were **broadly similar** in their proportional usage of lawful and unlawful sources to stream TV programs.

Those with a household income of **less than $40,000** were less likely to use lawful sources (87%, vs 92% of those earning over $80,000), and more likely to use other sources than those on higher incomes (8% compared to 4% of those earning between $40,000 and $80,000, and 2% of those earning over $80,000). In particular, those earning less than $40,000 were the least likely to use paid subscription services.

By employment status, proportional usage of lawful and unlawful streaming of TV programs online was also **broadly similar**, though those who were unemployed (not looking for work) were least likely to use a paid subscription service.

[22] Those who used only 'other' sources were excluded from this analysis.

Table 12: Average proportion of time spent streaming TV programs, by age, gender, household income and employment status, 2021

Base: Respondents who had streamed / accessed TV programs in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
n=	1,318	650	668	322	256	282	214	146	98	261	304	556	439	173	71	67	81	205	78	67	153
Lawful	**91%**	**90%**	**93%**	**89%**	**91%**	**92%**	**93%**	**95%**	**88%**	**87%**	**92%**	**92%**	**93%**	**91%**	**90%**	**95%**	**98%**	**89%**	**87%**	**89%**	**88%**
A paid for subscription service	50%	48%	53%	53%	57%	55%	44%	45%	42%	39%	52%	54%	54%	51%	48%	50%	51%	53%	51%	46%	44%
TV catch-up services	22%	20%	23%	13%	16%	19%	29%	33%	31%	28%	20%	20%	19%	23%	25%	27%	25%	14%	19%	25%	27%
On social media services	9%	12%	6%	9%	9%	9%	9%	7%	9%	11%	12%	6%	9%	7%	4%	9%	8%	10%	9%	11%	8%
Subscription to Pay TV services that allows you to watch online	9%	9%	9%	11%	9%	8%	11%	9%	6%	8%	8%	10%	10%	7%	11%	8%	14%	10%	6%	5%	9%
'Pay-per-view' / paying a single fee to rent individual TV programs / episodes	1%	1%	1%	3%	2%	1%	0%	0%	0%	1%	1%	2%	1%	2%	2%	1%	1%	2%	2%	1%	0%
Unlawful	**5%**	**5%**	**4%**	**7%**	**5%**	**4%**	**3%**	**2%**	**5%**	**5%**	**4%**	**5%**	**4%**	**5%**	**4%**	**3%**	**1%**	**7%**	**5%**	**4%**	**5%**
Through apps / services without paid subscription, but can be accessed through set-top box	1%	1%	1%	2%	1%	2%	1%	0%	1%	2%	1%	2%	1%	2%	1%	1%	<1%	3%	1%	1%	0%
Through other apps / services without paid subscription, that can be accessed through app marketplaces	2%	2%	1%	2%	2%	1%	1%	1%	3%	2%	1%	2%	1%	2%	1%	2%	<1%	2%	2%	1%	3%
Receiving a link to stream TV programs made available by someone else	1%	1%	1%	1%	2%	1%	<1%	<1%	2%	1%	1%	1%	1%	1%	2%	0%	<1%	1%	2%	1%	2%
A file hosting website or cyberlocker	1%	1%	<1%	1%	1%	<1%	<1%	0%	<1%	<1%	1%	1%	1%	<1%	<1%	<1%	<1%	1%	0%	1%	<1%
Other	**4%**	**5%**	**3%**	**4%**	**4%**	**3%**	**4%**	**4%**	**6%**	**8%**	**4%**	**2%**	**2%**	**5%**	**6%**	**2%**	**0%**	**4%**	**8%**	**7%**	**7%**
Stream for free from the internet, without really being sure where it comes from	3%	4%	3%	3%	3%	3%	3%	3%	5%	6%	4%	2%	2%	4%	6%	2%	<1%	4%	4%	5%	5%
Other	1%	1%	<1%	<1%	1%	1%	<1%	<1%	2%	2%	1%	<1%	<1%	1%	0%	0%	0%	1%	4%	2%	2%

Q32. How is the way you stream TV programs typically split across the following? (Enter % of time for each option). Caution low sample sizes for some age groups. Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.

Caution: low sample sizes for some groups, n=<10 suppressed (*).

Behaviour change: sources of downloading / streaming TV programs

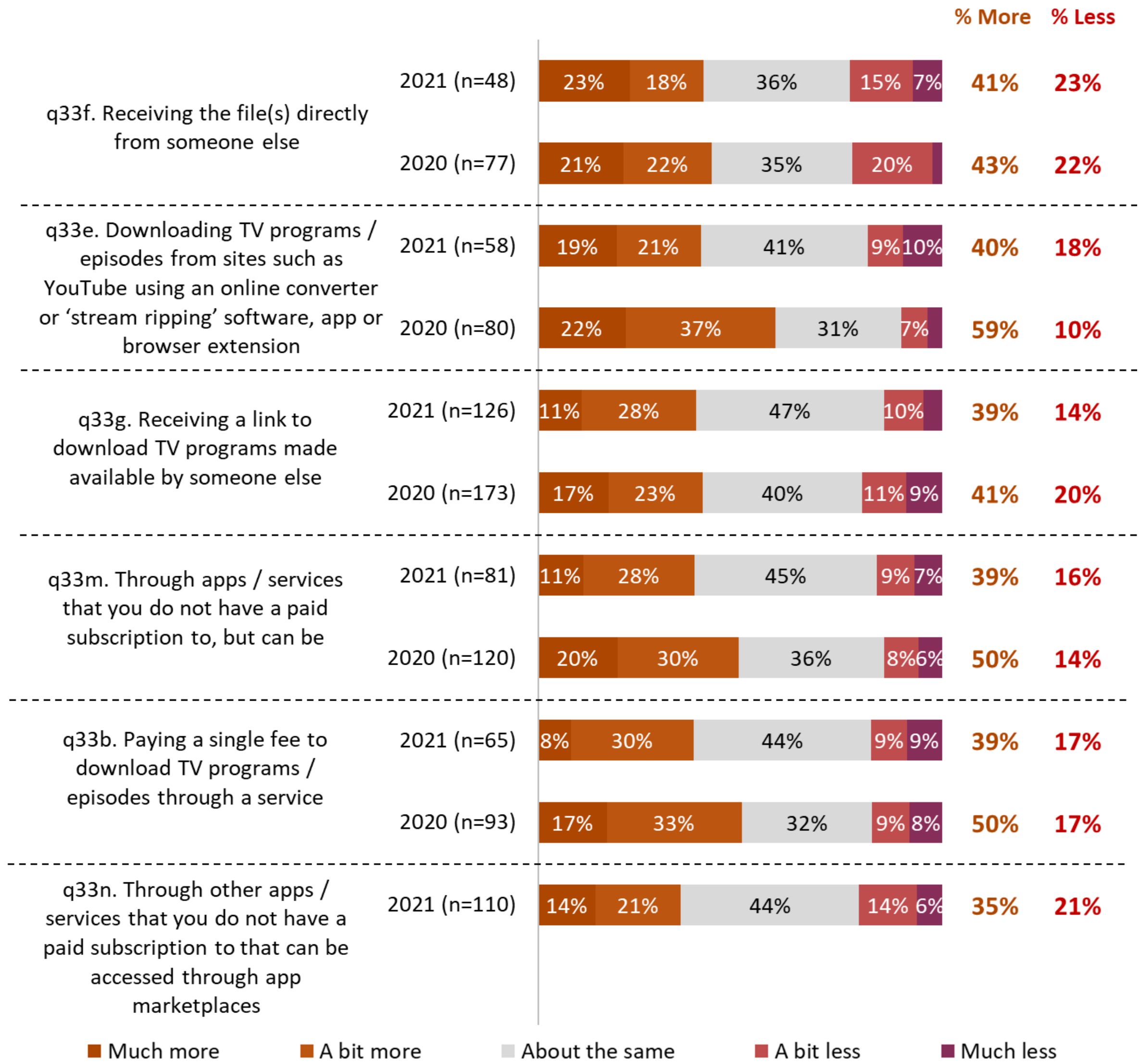
In order to explore any changes in behaviour over time, respondents were asked whether they were using various sources more, less, or about the same as this time one year ago.

As shown in Figure 22 overleaf, at least a quarter of respondents reported using all sources ‘much’ or ‘a bit’ **more** (at least 27%, broadly similar to the 34% minimum in 2020), while fewer than a quarter of respondents had used each source ‘much’ or ‘a bit’ **less** (6%-23%, consistent with 8%-24% in 2020). Compared to 2020, respondents were more likely to report using sources the same amount (36%-62%, versus 31%-49% in 2020).

Similarly, respondents were most likely to report stable behaviour in relation to using a paid subscription service to stream (62%, higher than 49% in 2020), using a subscription to a Pay TV service online (60%, higher than 45% in 2020), and social media services (59%, higher than 48% in 2020).

Figure 22: Change in usage of sources to download / stream TV programs

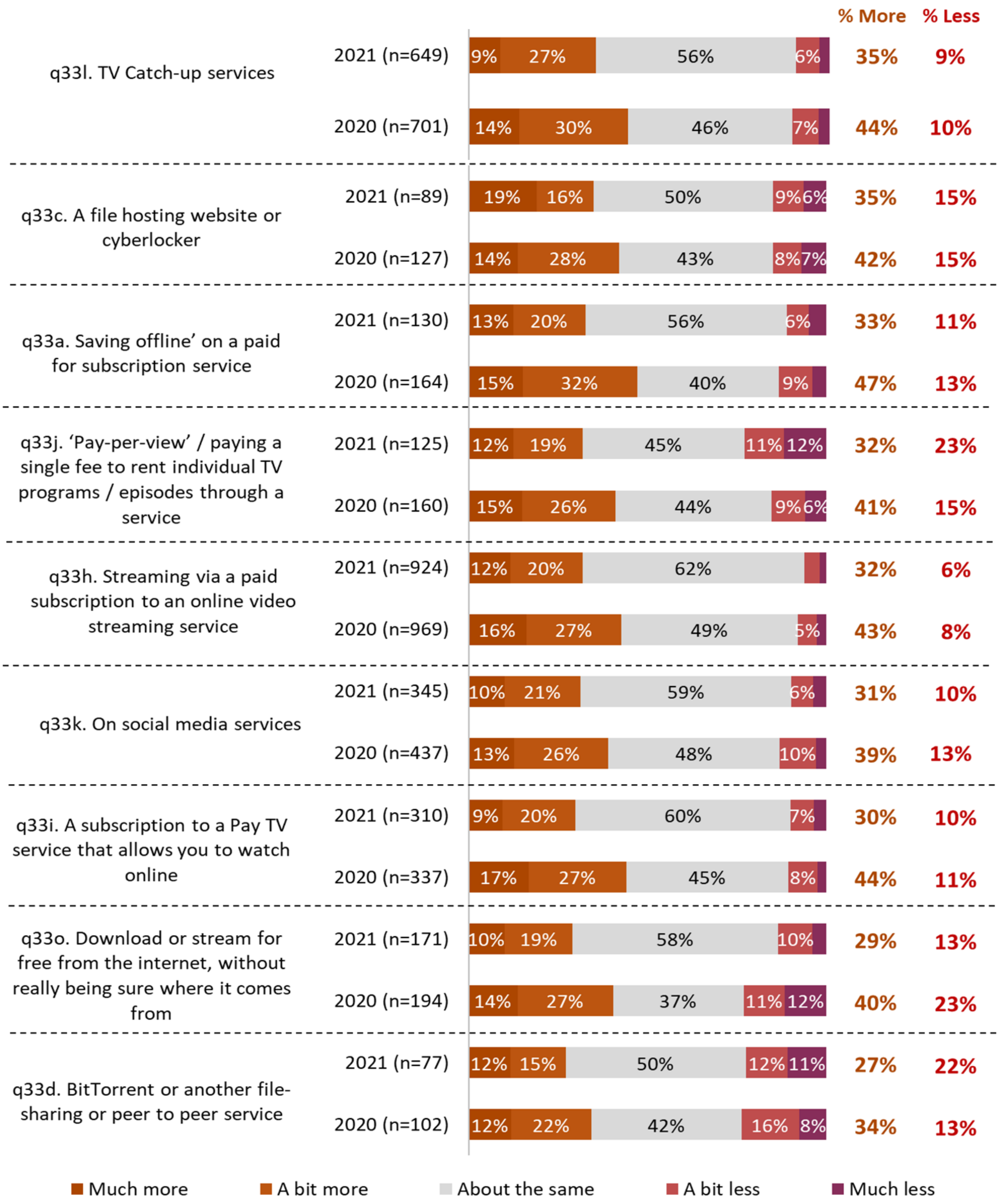
Base: Respondents who had used each source in the past 3 months



Q33. Overall, compared to this time last year, how often are you using these method(s) to access TV programs?

Figure 22 (continued): Change in usage of sources to download / stream TV programs

Base: Respondents who had used each source in the past 3 months



Q33. Overall, compared to this time last year, how often are you using these method(s) to access TV programs?

Those who indicated they were using a particular method more (n=513) were asked to elaborate on the reasons why. Top three reasons were the same as those cited last year, with respondents most commonly reporting this was because:

- they had more time to watch TV programs, for example due to the impacts of the COVID-19 pandemic (20%);
- it had a greater range of content (20%); and
- it was convenient / easier (14%).

Those who indicated they were using a particular method less (n= 209) most commonly reported this was because they had less interest in TV programs (34%).

Profile of TV program infringers

Overall (across both downloading and streaming / accessing), 80% of TV consumption online was done though lawful sources (non-infringers).

20% consumed TV programs in at least some **unlawful ways** (infringers) – 18% through a mix of lawful and unlawful sources, and 2% via unlawful sources only.

Table 13 illustrates several key demographic and behavioural differences between the two groups of consumers (infringers and non-infringers of TV programs).

Table 13: Profile of TV program infringers versus non-infringers

80% Non-infringers (all activities lawful) Base: Respondents who consumed TV programs online lawfully only (n=1,081)	20% Infringers (some / all activities unlawful) Base: Respondents who consumed TV programs online unlawfully (n=277)
Compared to infringers, non-infringers were more likely to be:	Compared to non-infringers, infringers were more likely to be:
Female (53%)	Male (61%)
Aged 35 years and over (60%)	Aged 12 to 24 years (36%)
No substantial differences by household income	No substantial differences by household income
Retired (15%)	Student (19%)
And were more likely to report:	And were more likely to report:
Streaming / accessing TV programs online (98%)	Downloading (48%) and sharing (15%) TV programs online
Using Netflix (61%)	Using many sites / services to consume TV programs online, excluding Netflix
	Unlawfully consuming music (61%), movies (82%), sports (70%) and video games (67%) online

VIII. Video games

Video games

Content consumption summary (2021)

26% (-4pp)
of all respondents **consumed** video games online in 2021

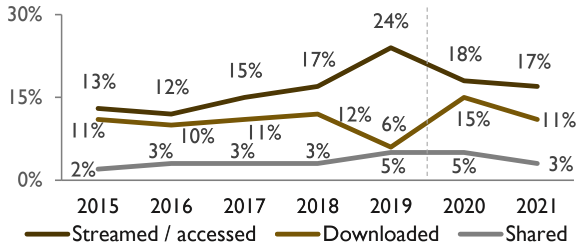
71% (+2pp)
of video game consumers accessed all content **lawfully**

29% (-2pp)
of video game consumers accessed some content **unlawfully**

How is video game content consumed through the internet?

In the past 3 months:

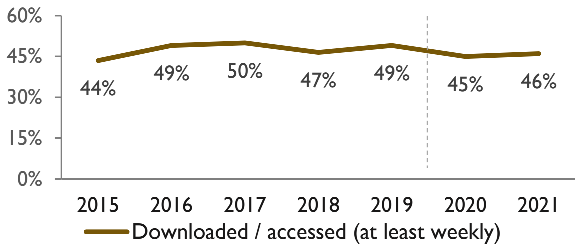
- **17%** **streamed / accessed** video games online
- **11%** **downloaded** video games online
- **3%** **shared** video games online



Of those who had consumed video game content online in the past 3 months:

46% downloaded or accessed video games **at least weekly**, while

68% did so **at least monthly**



Where are people going to consume video game content online?

In 2021, the top six sites or services used to consume video game content online were (change since 2020 indicated in brackets):

- **22%** (-5pp) Google Play
- **19%** (-5pp) Apple
- **17%** (-3pp) Facebook
- **14%** (-1pp) Steam
- **12%** (-4pp) Xbox Live
- **11%** (-8pp) PlayStation

In comparison, the top six sites or services used in 2015 were:

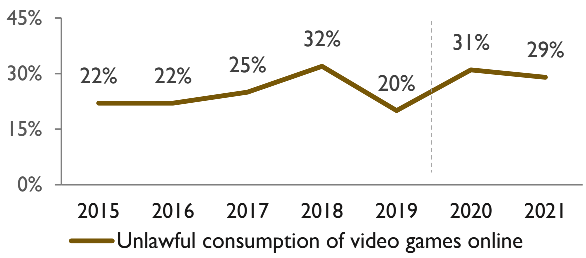
1. Steam – 24%
2. Apple – 23%
3. Facebook – 18%
4. Google Play – 15%
5. PlayStation – 13%
6. Xbox Live – 13%

How much video game content consumption online was unlawful?

29% consumed video games online in at least some **unlawful** ways

Of these:

5% used **only unlawful** sources to consume video games



Compared to non-infringers, **infringers** were more likely to be:

- Male (63%)
- Aged 12 to 24 years (47%)
- Students (29%)

Compared to non-infringers, **infringers** were more likely to:

- Use most sites / services to consume video games online
- Unlawfully consume music (69%), TV programs (69%), sports (77%) and movies (74%) online

NOTE: Caution should be used when comparing 2020-21 results to previous years due to methodology changes (indicated by vertical dotted line in charts).

Chapter overview

This chapter presents the findings in relation to video game consumption online. Over one-quarter (26%) of respondents had engaged with video games online in the past 3 months, most commonly via app stores (e.g. Google Play or Apple Store), though engagement and usage of these sources declined in 2021.

Of the respondents who indicated that they consumed video games online, 71% did so through lawful sources (non-infringers). The remaining 29% consumed at least some video games via unlawful sources (infringers).

Consumption behaviours

26% of respondents had **engaged with video games online in the past 3 months** (downloaded, streamed or shared)[23], down from 30% reported in 2020.

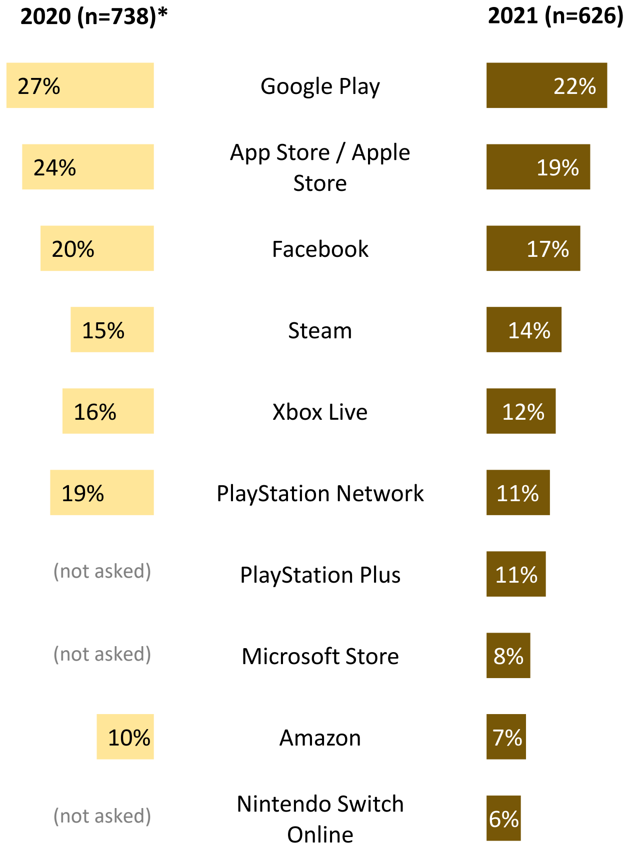
Of those who had engaged with video games online, respondents were most likely to do so through streaming / accessing (17%, in line with 18% in 2020). 11% of respondents also downloaded video games online, a decrease from 2020 (15%), whilst a small proportion reported **sharing** video games online (3%, comparable to 5% in 2020).

As in 2020, respondents primarily used Google Play (22%), and the Apple App Store (19%), though usage was reportedly lower than in 2020 (27% and 24% respectively).

[23] Q12. In the past 3 months, which of the following have you streamed / accessed, downloaded, or shared through the internet? (n=2,388)

Figure 23: Top 10 services used to download or access video games

Base: Respondents who had downloaded or streamed / accessed video games in the past 3 months



Q43. Which sites or services have you used in the past 3 months to download or access video games through the internet? (Multiple response)

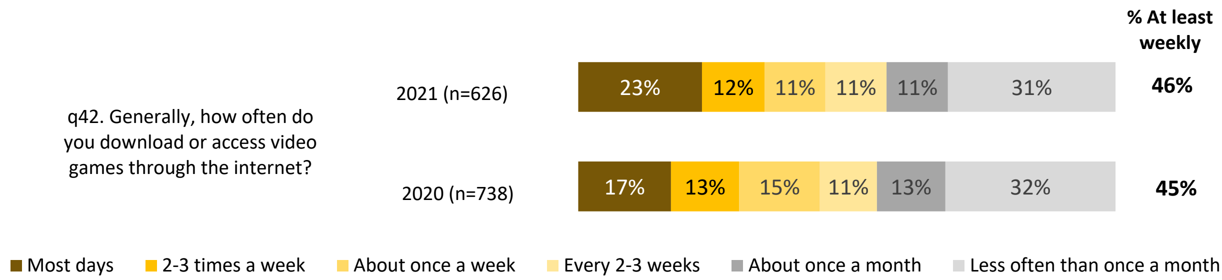
*The following sources were not asked in 2020: PlayStation Plus, Microsoft Store, and Nintendo Switch Online

Frequency of consumption

The proportion of respondents who downloaded / accessed video games online at least weekly was broadly unchanged in 2021 (46%, similar to 45% in 2020 – see Figure 24), though the proportion who indicated that they downloaded / accessed **most days** increased (23%, up from 17%).

Figure 24: Frequency of video game consumption

Base: Respondents who had downloaded or streamed / accessed video games in the past 3 months



Q42. Generally, how often do you download or access video games through the internet?

Table 14 overleaf shows the overall amount and frequency of video game consumption by age, gender, household income and employment status.

Those **aged between 12 and 24** were the most likely to consume video games online, with consumption decreasing significantly among those aged 45 and older.

Overall consumption of video games was higher among **males**.

Those with a household income of **over $80,000** reported the highest consumption of video games.

Students reported the highest consumption levels of video games online.

Table 14: Consumption of video games online, by age, gender, household income and employment status, 2021

Base: All respondents, and respondents who had downloaded or streamed / accessed video games in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
Overall n=	2,392	1,192	1,200	531	400	438	407	327	289	576	579	839	759	293	111	107	135	332	148	140	395
Consume video games online	**26%**	**30%**	**21%**	**47%**	**33%**	**32%**	**19%**	**10%**	**8%**	**21%**	**26%**	**29%**	**31%**	**23%**	**27%**	**20%**	**24%**	**44%**	**35%**	**20%**	**10%**
Accessed n=	626	371	255	234	130	135	75	31	21	130	156	244	226	67	29	20	31	141	53	28	41
2-3 times a week or more often	35%	33%	37%	35%	28%	28%	41%	55%	53%	38%	34%	33%	30%	33%	41%	36%	42%	34%	38%	19%	56%
About once every 1-3 weeks	23%	26%	18%	30%	25%	23%	15%	6%	0%	19%	23%	26%	29%	23%	20%	10%	9%	26%	17%	23%	2%
About once a month or less often	43%	41%	44%	36%	48%	48%	43%	39%	47%	43%	43%	41%	41%	43%	39%	54%	49%	39%	45%	58%	42%

Q42. Generally, how often do you download or access video games through the internet? Caution low sample sizes for some age groups.

Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.
Caution: low sample sizes for some groups, n=<10 suppressed (*).

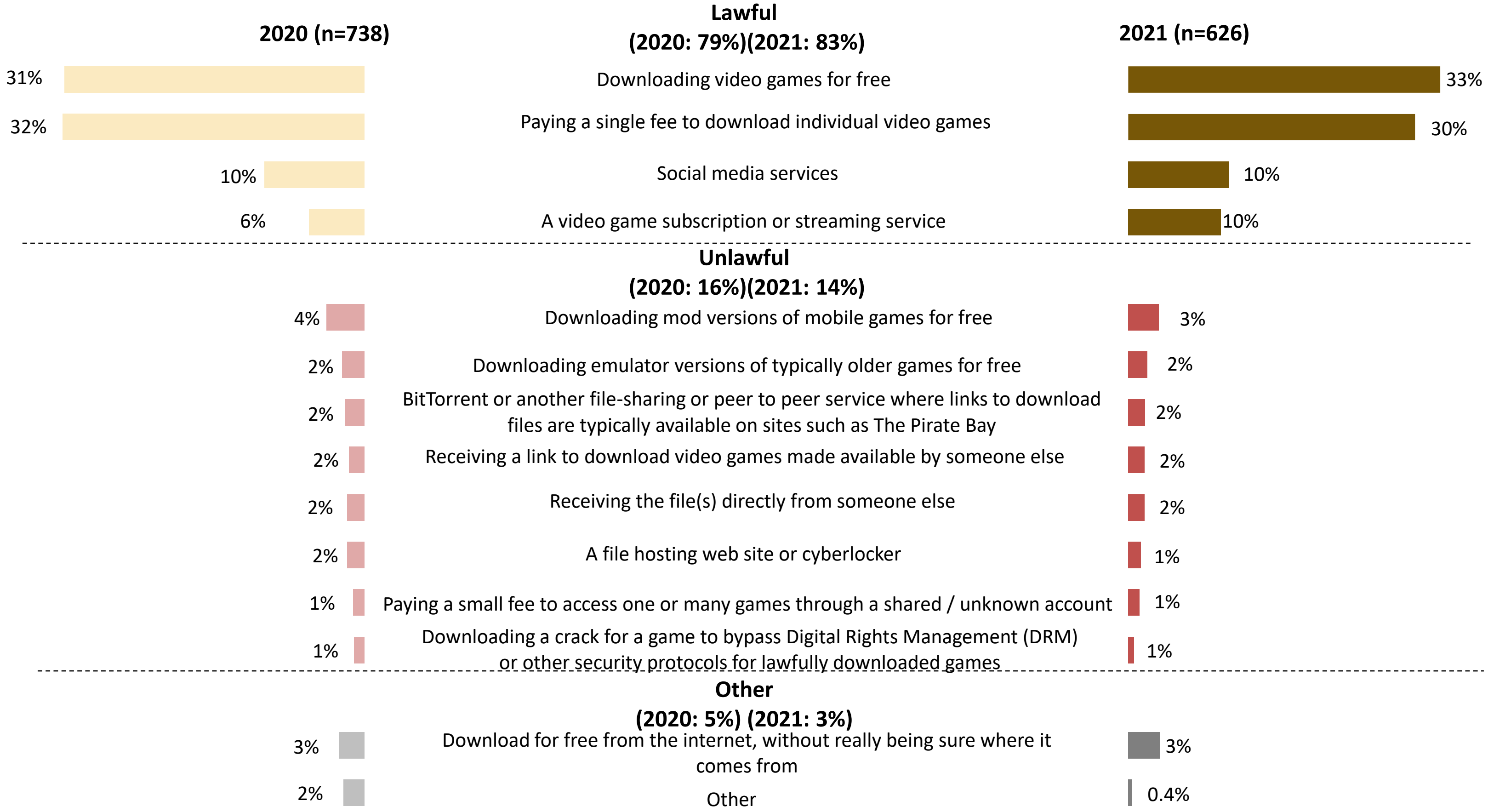
Sources of downloading / accessing video games

Respondents were asked to nominate the sources they typically used to download / access video games online and indicate the proportion of their time spent using each source. Figure 25 overleaf shows that respondents used largely similar methods between 2020 and 2021, with respondents reportedly using:

- mainly lawful sources (83%, broadly similar to 79% in 2020) – most commonly downloading video games for free, and paying a single fee to download individual video games (33% and 30% respectively, comparable to 31% and 32% respectively in 2020); and
- unlawful sources on average 13% of the time (broadly in line with 16% in 2020).

Figure 25: Average proportion of time spent downloading / accessing video games, by source[24]

Base: Respondents who had downloaded or streamed / accessed video games in the past 3 months



Q44. How is the way that you download / access video games typically split across the following? (Enter percentage of time for each option)[25]

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[24] Results reflect the average proportion of time spent using each source identified by the respondent and does not factor in the actual amount of time spent downloading / accessing content.

[25] Survey respondents were intentionally not provided with the definition of these sources, in order to test their understanding of them. Respondents were asked to assume they did not use such technologies if they did not know what they were. A cyber locker is a third-party file hosting services that can be accessed over the internet. They provide storage a secure storage space for files / media / data online.

Based on their responses, respondents were classified into three consumer groups: using lawful sources only, using unlawful sources only, or using a mix of lawful and unlawful sources to download / access video games.[26]

71% downloaded / accessed video games online through **lawful** sources only (in line with 69% in 2020). Around a quarter (24%, as in 2020) of respondents used a mix of lawful and unlawful sources, and 5% used only unlawful sources (comparable to 7% in 2020).

Those who said that they had downloaded video games for free without really being sure where they came from (3%) were asked to describe how or where they had obtained them. Most commonly cited sources included:

- a friend / family member showing or assisting them to access the content (18%);
- through a Google search / search engine (17%); and
- via unspecified websites on the internet (15%).

As illustrated in Table 15, video game consumption behaviours varied somewhat by age, gender, household income and employment status.

The average proportion of time spent using **unlawful** sources to download / access video games was higher among those aged between **12 and 24**, and those aged **65 and over** (17% and 19% of the time, respectively). Those aged 25 to 34 and 35 to 44 also did so 12% - 24% of the time.

Though results **did not differ** substantially by gender, females were slightly more likely to report downloading video games for free (37%, compared to 29% of males).

By household income, there were **no substantial differences**, though those with a household income of below $40,000 reported the highest average proportion of time spent downloading video games using unlawful sources.

By **employment status, students** were most likely to use unlawful sources to download / access video games online.

[26] Those who used only 'other' sources were excluded from this analysis.

Table 15: Average proportion of time spent downloading / accessing video games, by age, gender, household income and employment status, 2021

Base: Respondents who had downloaded or streamed / accessed video games in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
n=	626	371	255	234	130	135	75	31	21	130	156	244	226	67	29	20	31	141	53	28	41
Lawful	**83%**	**82%**	**84%**	**79%**	**82%**	**88%**	**87%**	**92%**	**78%**	**79%**	**83%**	**85%**	**83%**	**83%**	**88%**	**86%**	**92%**	**77%**	**87%**	**85%**	**81%**
Paying a single fee to download individual video games	30%	32%	27%	31%	33%	36%	25%	26%	6%	26%	30%	33%	32%	31%	30%	36%	24%	31%	34%	26%	15%
Downloading video games for free	33%	29%	37%	29%	29%	36%	41%	31%	46%	33%	26%	35%	31%	28%	41%	33%	42%	29%	33%	31%	43%
Social media services	10%	10%	12%	7%	10%	7%	15%	23%	25%	11%	19%	6%	10%	12%	10%	11%	7%	7%	7%	18%	19%
A video game subscription or streaming service	10%	11%	8%	12%	10%	9%	7%	12%	<1%	10%	9%	11%	9%	12%	7%	5%	20%	10%	13%	10%	4%
Unlawful	**14%**	**14%**	**13%**	**17%**	**14%**	**12%**	**7%**	**1%**	**19%**	**16%**	**11%**	**14%**	**15%**	**10%**	**9%**	**13%**	**7%**	**18%**	**11%**	**7%**	**13%**
Downloading mod versions of mobile games for free	3%	3%	4%	4%	3%	3%	1%	<1%	11%	6%	2%	3%	3%	1%	2%	1%	4%	3%	3%	1%	7%
Downloading emulator versions of typically older games for free	2%	3%	1%	1%	2%	2%	3%	0%	5%	2%	2%	2%	3%	2%	1%	<1%	1%	2%	<1%	4%	1%
BitTorrent or other file-sharing/ peer to peer service where links to download files are available on sites such as The Pirate Bay	2%	2%	1%	2%	2%	2%	<1%	<1%	0%	1%	2%	2%	2%	1%	3%	5%	<1%	2%	<1%	<1%	1%
A file hosting web site or cyberlocker	1%	1%	1%	2%	2%	1%	<1%	0%	<1%	1%	1%	2%	2%	2%	<1%	<1%	<1%	2%	1%	<1%	1%
Receiving the file(s) directly from someone else	2%	2%	1%	3%	1%	1%	<1%	<1%	2%	2%	2%	1%	2%	1%	1%	<1%	<1%	3%	1%	<1%	1%

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
n=	626	371	255	234	130	135	75	31	21	130	156	244	226	67	29	20	31	141	53	28	41
Receiving link to download games made available by someone else	2%	2%	1%	3%	2%	1%	<1%	<1%	<1%	1%	1%	2%	1%	1%	1%	<1%	1%	3%	5%	<1%	1%
Paying a small fee to access one or many games through a shared / unknown account	1%	1%	1%	1%	1%	1%	2%	0%	0%	2%	1%	1%	1%	1%	<1%	5%	<1%	2%	<1%	<1%	1%
Downloading a crack for a game to bypass Digital Rights Management (DRM) or other security protocols for lawfully downloaded games	1%	<1%	1%	1%	1%	<1%	0%	0%	<1%	<1%	<1%	1%	1%	<1%	<1%	<1%	<1%	1%	1%	<1%	<1%
Other	**3%**	**4%**	**3%**	**4%**	**5%**	**0%**	**6%**	**6%**	**3%**	**5%**	**6%**	**2%**	**2%**	**7%**	**3%**	**0%**	**0%**	**5%**	**2%**	**9%**	**6%**
Download for free from the internet, without really being sure where it comes from	3%	4%	2%	4%	5%	0%	3%	6%	3%	5%	5%	2%	2%	7%	3%	<1%	<1%	5%	2%	4%	6%
Other	<1%	<1%	1%	<1%	0%	0%	3%	0%	0%	0%	1%	0%	<1%	0%	0%	0%	0%	0%	0%	4%	0%

Q44. How is the way that you download / access video games typically split across the following? (Enter % of time for each option). Caution low sample sizes for some age groups.

Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.
Caution: low sample sizes for some groups, n=<10 suppressed (*).

Behaviour change: sources of downloading / accessing video games

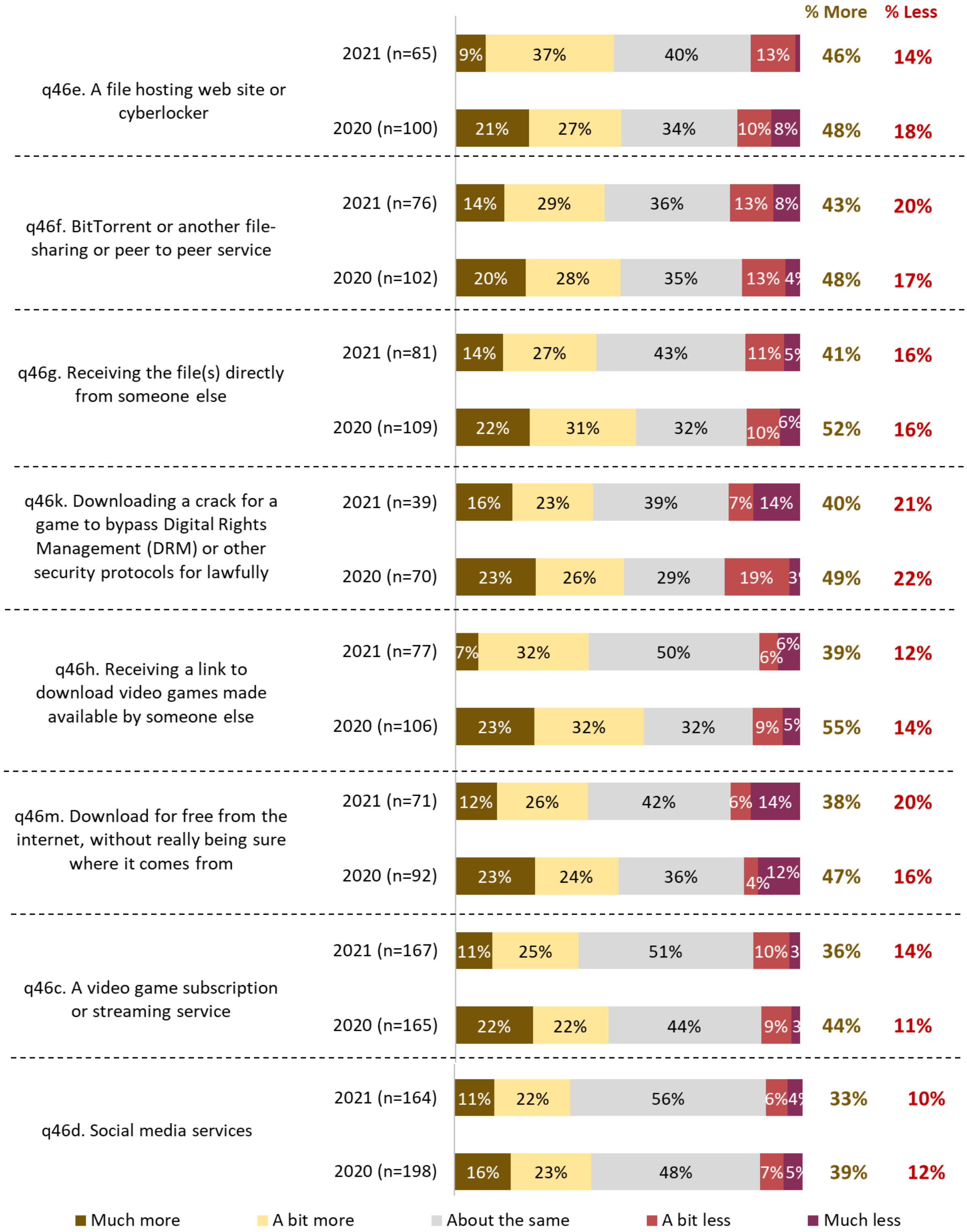
In order to explore any changes in behaviour over time, respondents were asked whether they were using various sources more, less, or about the same as this time one year ago. As illustrated in Figure 26 overleaf, over two-in-five respondents indicated that they were using the following unlawful sources 'much' or 'a bit' more by:

- using a file hosting website or cyberlocker (46%, in line with 48% in 2020);
- using BitTorrent or another file-sharing or peer to peer service (43%, broadly comparable to 48% in 2020); and
- receiving the file(s) directly from someone else (41%, lower than 52% in 2020, though this difference was not significant due to low sample size).

As in 2020, lawful sources were more likely to be used about the same amount (51%-59%, similar to 44%-48%).

Figure 26: Change in usage of sources to download / access video games

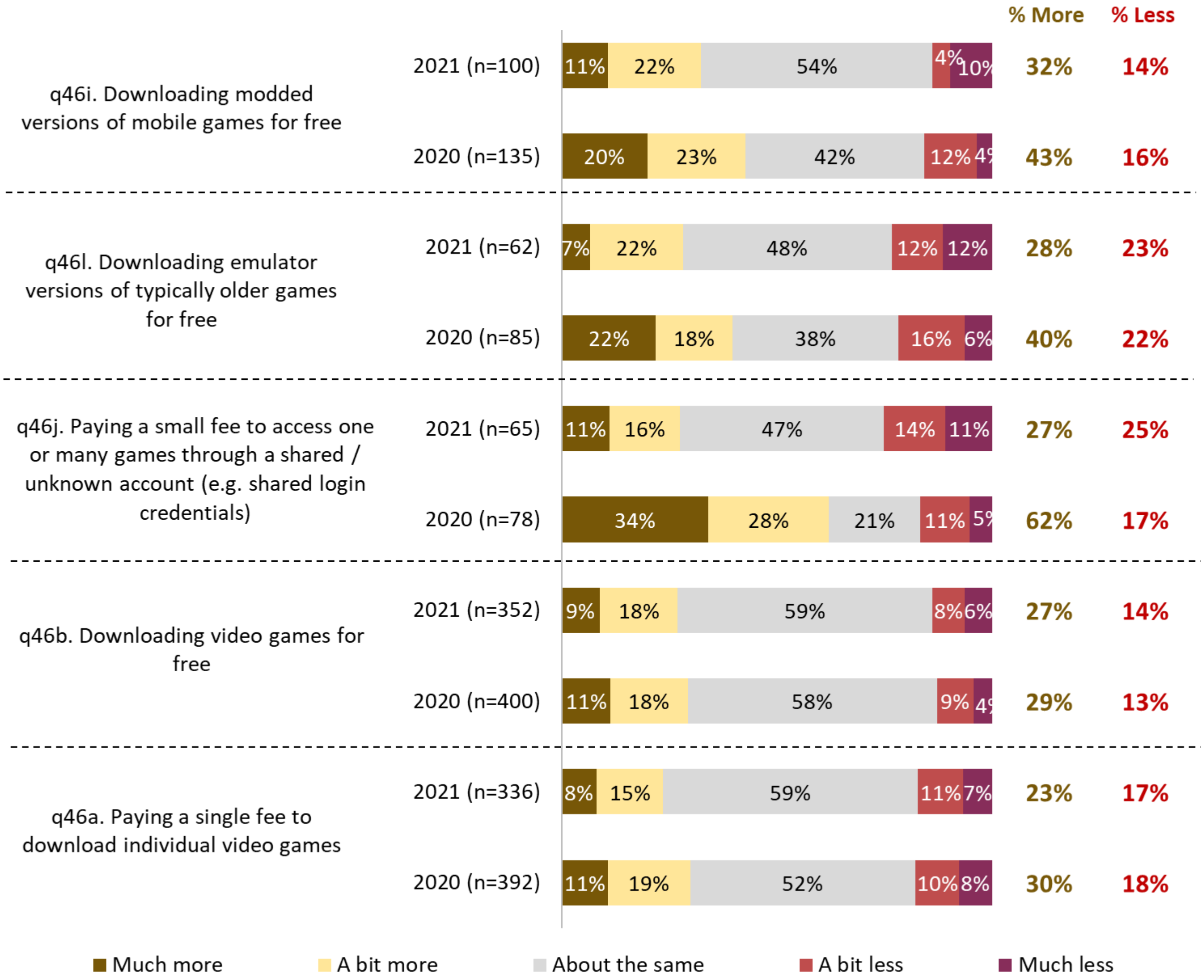
Base: Respondents who had used each source in the past 3 months



Q46. Overall, compared to this time last year, how often are you using this method(s) to access video games?

Figure 26 (continued): Change in usage of sources to download / access video games

Base: Respondents who had used each source in the past 3 months



Q46. Overall, compared to this time last year, how often are you using this method(s) to access video games?

Those who indicated that they were using a particular method more to access video game content (n=178) indicated that this was because:

- they had more time to play video games or because they have a reason to be downloading games now (e.g. just purchased a new console) (21%); and
- it was cheaper / free (20%).

Those who had used a particular method less indicated that they had done so because:

- they were less interested in video games at the moment (38%); and
- it was too expensive / they could obtain free content elsewhere (25%).

Profile of video game infringers

As previously mentioned, 71% of respondents consumed video games online through only lawful sources (non-infringers).

29% consumed video games in at least some **unlawful** ways (infringers). 24% did so through a mix of lawful and unlawful sources, and 5% via unlawful sources only.

As shown in Table 16, there were several key demographic and behavioural differences between the two groups of consumers (infringers and non-infringers of video games).

Table 16: Profile of video game infringers versus non-infringers

	Non-infringers		Infringers
71%	Non-infringers (all activities lawful) Base: Respondents who consumed video games online lawfully only (n=430)	29%	Infringers (some / all activities unlawful) Base: Respondents who consumed video games online unlawfully (n=180)
	Compared to infringers, non-infringers were more likely to be:		Compared to non-infringers, infringers were more likely to be:
	Female (45%)		Male (63%)
	Aged 35 years and over (45%)		Aged 12 to 24 years (47%)
	No substantial differences by household income		No substantial differences by household income
	No substantial differences by employment status		Student (29%)
	And were more likely to report:		And were more likely to report:
	Streaming / accessing music (72%), movies / films (78%), and TV programs (84%) online		Using most sites / services to consume video games online
			Unlawfully consuming music (69%), TV programs (69%), sports (77%) and movies (74%) online

*Excludes don't know and prefer not to say

IX. Live sport

Live sports

Content consumption summary (2021)

26% (-1pp) of all respondents **consumed** live sports online in 2021

76% (+7pp) of live sports consumers accessed all content **lawfully**

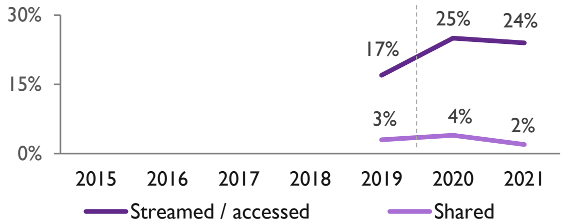
24% (-7pp) of live sports consumers accessed some content **unlawfully**

How is live sport content consumed through the internet?

In the past 3 months:

24% **streamed / accessed** live sport content online

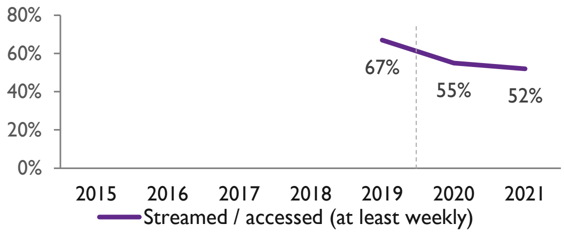
2% **shared** live sport content online



Of those who had consumed live sport content online in the past 3 months:

52% streamed / accessed live sport **at least weekly**

73% did so **at least monthly**



Where are people going to consume live sport content online?

In 2021, the top six sites or services used to consume live sport content online were (change since 2020 indicated in brackets):

- **25%** (+8pp) Kayo Sports
- **24%** (-8pp) Foxtel / Foxtel Now
- **15%** (-10pp) Live TV**
- **14%** (N/A) 7plus
- **13%** (N/A) 9Now
- **8%** (-13pp) Facebook

In comparison, the top six sites or services used in 2019 were:

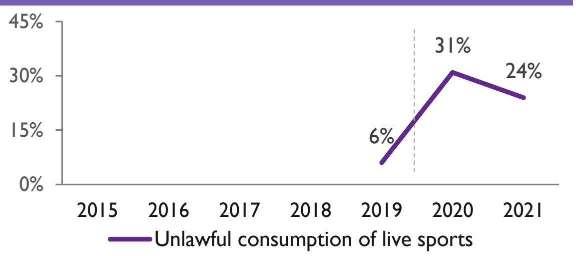
1. Foxtel – 29%
2. Live TV – 20%
3. Fox Sports – 20%
4. Foxtel Now – 14%
5. Facebook – 13%
6. Kayo Sports – 11%

How much live sport content consumption online was unlawful?

24% consumed live sport online in at least some **unlawful** ways

Of these:

5% used **only unlawful** sources to consume live sport



Compared to non-infringers, **infringers** were more likely to be:

- Aged 12 to 24 years (45%)
- Students (23%)

Compared to non-infringers, **infringers** were more likely to report:

- Using many sites / services to consume live sport online (excluding Kayo Sports)
- Unlawfully consuming music (66%), movies (75%), TV programs (70%), and video games (69%) online

NOTE: Caution should be used when comparing 2020-21 results to previous years due to methodology changes (indicated by vertical dotted line in charts).
**The 2021 survey included hover text for LiveTV with the following information 'LiveTV is the name of a live-sport streaming website rather than free to air television', potentially affecting how respondents interpreted this option.

Chapter overview

This chapter presents the findings in relation to live sport consumption online. Similar to 2020, just over a quarter had engaged with live sport online in the past 3 months. Kayo Sports and Foxtel / Foxtel Now were the main services respondents had used to engage with live sports, though usage levels changed in 2021. Respondents were more likely to report using Kayo Sports than in 2020, and were less likely to engage using Foxtel / Foxtel Now.

Over three quarters of respondents who consume live sport online did so through lawful sources (non-infringers). The remainder consumed at least some live sport unlawfully (infringers).

When interpreting **2021 results against previous years' results**, the reader is encouraged to consider the changes in methodology between years, in particular the impacts of the COVID-19 pandemic since 2020 on the availability of live sport both in Australia, and globally. It should also be noted that it was up to the respondent to interpret the term 'live' when considering any sport content that may have been consumed during this period.

Consumption behaviours

26%

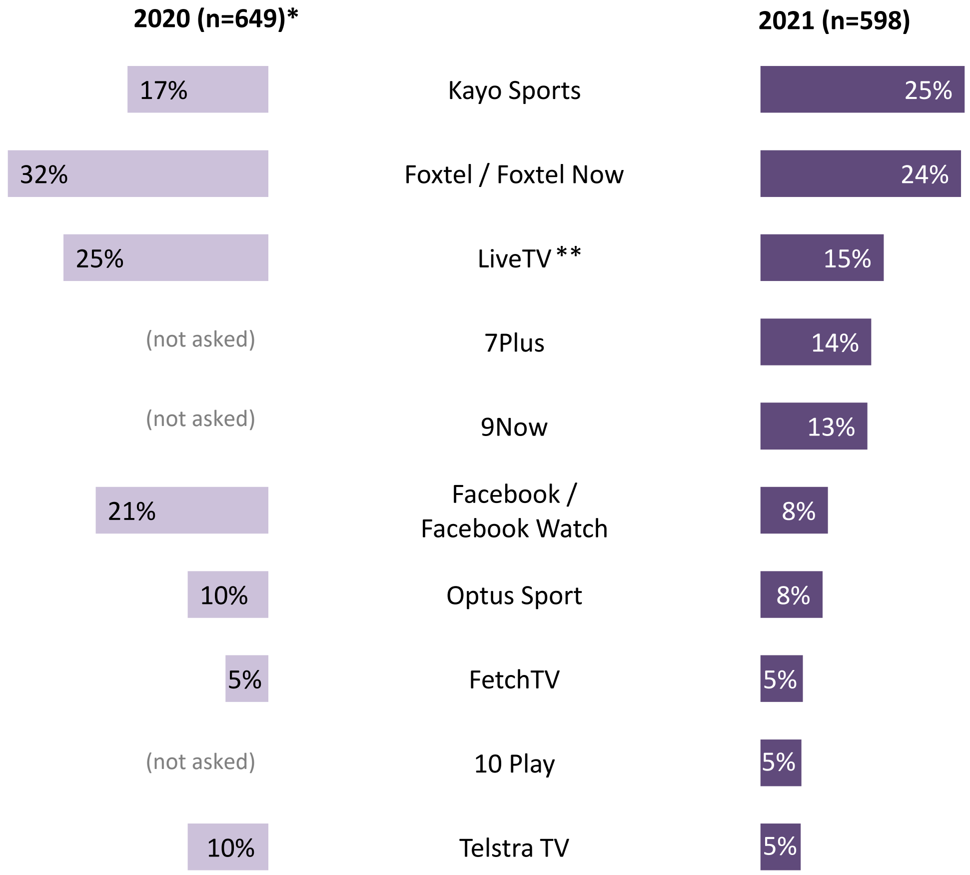
of respondents had **engaged with live sport online in the past 3 months** (streamed or shared),[27] comparable to 27% reported in 2020.

Around a quarter of respondents who engaged with live sports online did so by streaming (24%, in line with 25% in 2020), and few did so via sharing (2%, similar to 4% in 2020). Figure 27 illustrates that respondents primarily used Kayo Sports (25%, up from 17% in 2020) and Foxtel / Foxtel Now (24%, down from 32% in 2020) to consume live sport online.

[27] Q12. In the past 3 months, which of the following have you streamed / accessed, downloaded, or shared through the internet? (n=2,388)

Figure 27: Top 10 services used to stream / access live sport

Base: Respondents who had streamed / accessed live sport in the past 3 months



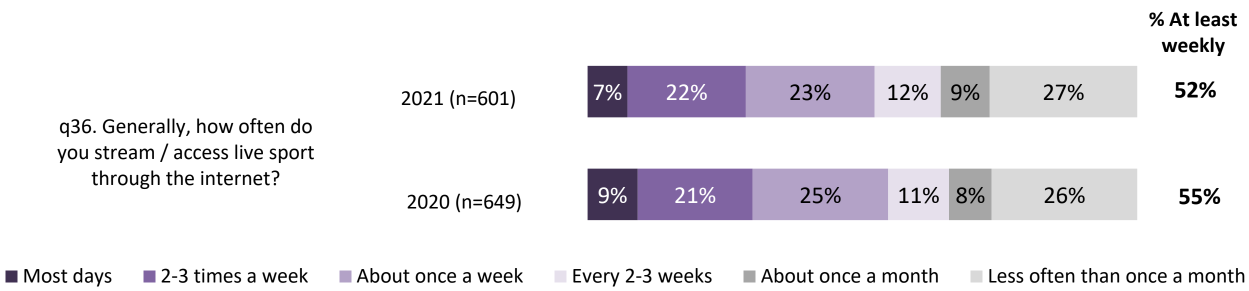
Q37. Which sites or services have you used in the past 3 months to stream / access live sport through the internet? (Multiple response).
*The following sources were not asked in 2020: 7Plus, 9Now and 10 Play
**The 2021 survey included hover text for LiveTV with the following information 'LiveTV is the name of a live-sport streaming website rather than free to air television', affecting how respondents interpreted this option.

Frequency of consumption

As shown in Figure 28, frequency of streaming / accessing live sport online was similar to 2020, with 52% reporting doing so at least weekly (comparable to 55% in 2020).

Figure 28: Frequency of live sport consumption

Base: Respondents who had streamed / accessed live sport in the past 3 months



Q36. Generally, how often do you stream / access live sport through the internet?

Table 17 below shows the overall amount and frequency of live sport consumption by age, gender, household income and employment status.

Those aged between **12 and 24** and **25 and 34** reported the highest overall consumption of live sport online, with consumption decreasing substantially among those aged 45 and older.

Online live sport consumption was higher among **males**.

Those earning **over $80,000** had the highest reported consumption of live sport online, though frequency of consumption did not differ substantially by household income.

Consumption also was highest among **students** and those working **full-time**, whilst frequency of consumption was greatest among those who were **stay-at-home parents / carers.**

Table 17: Consumption of live sport online, by age, gender, household income and employment status, 2021

Base: All respondents, and respondents who had streamed / accessed live sport in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
Overall n=	2,392	1,192	1,200	531	400	438	407	327	289	576	579	839	759	293	111	107	135	332	148	140	395
Consume live sport online	**26%**	**34%**	**18%**	**38%**	**32%**	**29%**	**21%**	**16%**	**14%**	**17%**	**28%**	**34%**	**34%**	**27%**	**21%**	**27%**	**13%**	**35%**	**23%**	**15%**	**15%**
Accessed n=	601	398	203	183	124	120	80	53	41	100	152	283	247	75	22	27	17	106	29	22	59
2-3 times a week or more often	29%	31%	24%	30%	32%	26%	24%	32%	25%	28%	28%	29%	27%	26%	21%	36%	43%	31%	34%	24%	29%
About once every 1-3 weeks	35%	35%	37%	38%	35%	40%	27%	27%	39%	36%	28%	39%	37%	35%	44%	41%	17%	38%	24%	27%	32%
About once a month or less often	36%	34%	39%	31%	33%	34%	49%	41%	36%	36%	44%	32%	36%	39%	35%	23%	40%	32%	41%	49%	39%

Q36. Generally, how often do you stream / access live sport through the internet? Caution low sample sizes for some age groups.

Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.
Caution: low sample sizes for some groups, n=<10 suppressed (*).

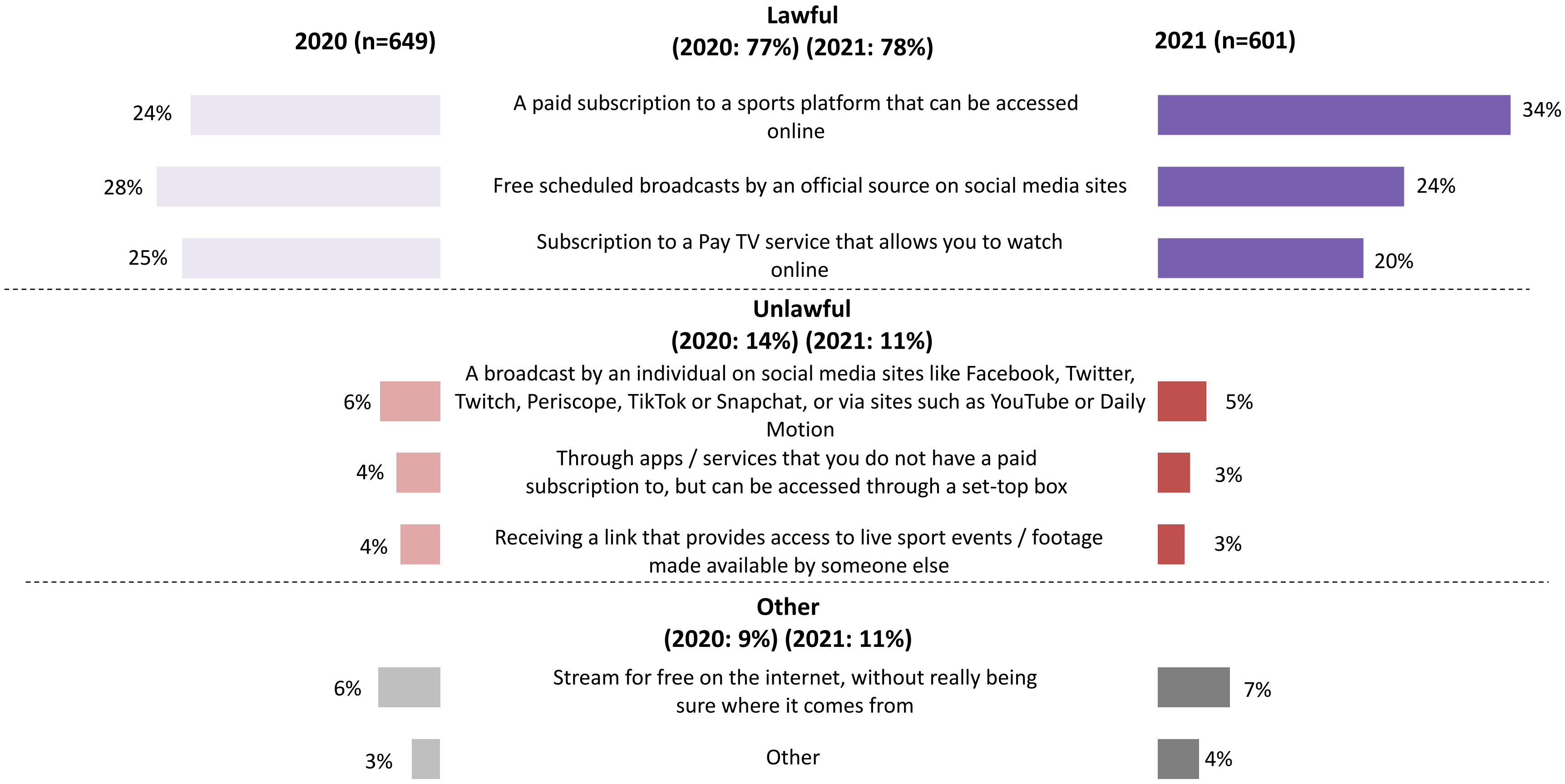
Sources of streaming / accessing live sport

Respondents were asked to nominate the sources they typically used to stream / access live sport online and indicate the proportion of their time spent using each source. As illustrated in Figure 29, respondents used:

- lawful sources the majority of the time (78%, similar to 77% in 2020); and
- unlawful sources an average of 11% (down from 14% in 2020) of the time.

Figure 29: Average proportion of time spent streaming live sport, by source[28]

Base: Respondents who had streamed / accessed live sport in the past 3 months



Q38. How is the way you stream live sports typically split across the following? (Enter percentage of time for each option)[29]

[28] Results reflect the average proportion of time spent using each source identified by the respondent and does not factor in the actual amount of time each respondent spent streaming content.
[29] Survey respondents were intentionally not provided with the definition of these sources, in order to test their understanding of them. Respondents were asked to assume they did not use such technologies if they did not know what they were.

Based on their responses, respondents were classified into three consumer groups: using lawful sources only, using unlawful sources only, or using a mix of lawful and unlawful sources to stream live sports.[30]

76% streamed / accessed live sport online through **lawful sources only** (up from 69% in 2020). 19% used a mix of lawful and unlawful sources (down from 25%), and 5% streamed / accessed only unlawfully (in line with 6% in 2020).

Table 18 illustrates how live sport consumption behaviours varied by demographic characteristics.

The average proportion of time spent using lawful and unlawful sources did not differ substantially across **age groups**.

Results did not vary substantially between **males and females**.

Proportional usage of lawful and unlawful sources was broadly similar across levels of **household income**.

Those who were **stay-at-home parents / carers** reported the highest proportional usage of lawful sources, while those who were **unemployed (and not looking for work)** had the highest usage of unlawful sources.

[30] Those who used only 'other' sources were excluded from this analysis.

Table 18: Average proportion of time spent streaming live sport, by age, gender, household income and employment status, 2021

Base: Respondents who had streamed / accessed live sport in the past 3 months

	Overall	Male	Female	12–24	25-34	35-44	45–54	55-64	65+	< $40,000	$40,000 - $80,000	> $80,000	Full-time	Part-time	Casual / Contract	Self - employed	Stay-at-home parent / carer	Student	Unemployed (looking for work)	Unemployed (not looking for work)	Retired
n=	601	398	203	183	124	120	80	53	41	100	152	283	247	75	22	27	17	106	29	22	59
Lawful	**78%**	**77%**	**82%**	**79%**	**74%**	**82%**	**76%**	**73%**	**87%**	**71%**	**77%**	**81%**	**78%**	**82%**	**96%**	**77%**	**74%**	**77%**	**67%**	**63%**	**82%**
Free scheduled broadcasts by an official source on social media sites	24%	23%	26%	23%	19%	21%	24%	28%	40%	28%	28%	19%	18%	28%	32%	20%	30%	24%	20%	26%	34%
Subscription to a Pay TV service that allows you to watch online	20%	20%	20%	23%	19%	18%	16%	15%	26%	18%	18%	21%	19%	18%	17%	20%	27%	22%	20%	9%	23%
Paid subscription to a sports platform that can be accessed online	34%	34%	36%	33%	36%	43%	37%	30%	20%	25%	31%	41%	41%	36%	46%	38%	17%	31%	27%	28%	25%
Unlawful	**11%**	**11%**	**10%**	**12%**	**13%**	**8%**	**12%**	**11%**	**3%**	**12%**	**12%**	**10%**	**10%**	**9%**	**3%**	**10%**	**19%**	**14%**	**13%**	**25%**	**4%**
A broadcast by an individual on social media sites like Facebook, Twitter, Twitch, Periscope, TikTok or Snapchat, or via sites such as YouTube or Daily Motion	5%	5%	5%	5%	4%	5%	7%	7%	1%	6%	7%	3%	5%	4%	1%	8%	12%	6%	5%	12%	1%
Through apps / services without paid subscription, but can be accessed through a set-top box	3%	3%	3%	4%	4%	2%	3%	2%	2%	3%	3%	4%	3%	2%	<1%	2%	2%	5%	<1%	11%	2%
Receiving a link that provides access to live sport events / footage made available by someone else	3%	3%	2%	3%	5%	1%	2%	2%	0%	3%	2%	3%	2%	2%	2%	0%	5%	3%	8%	3%	2%
Other	**11%**	**12%**	**9%**	**9%**	**13%**	**10%**	**12%**	**16%**	**10%**	**17%**	**10%**	**9%**	**12%**	**8%**	**1%**	**13%**	**7%**	**9%**	**20%**	**12%**	**13%**
Stream for free on the internet, without really being sure where it comes from	7%	8%	5%	7%	10%	7%	8%	4%	4%	12%	6%	6%	7%	6%	1%	5%	4%	8%	17%	7%	7%
Other	4%	4%	4%	2%	3%	3%	4%	11%	7%	5%	4%	4%	4%	3%	0%	8%	3%	2%	3%	5%	7%

Q38. How is the way you stream live sports typically split across the following? (Enter % of time for each option).

Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these cateogiries may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the total number of respondents who answered a given question.
Caution: low sample sizes for some groups, n=<10 suppressed (*).

Behaviour change: sources of streaming / accessing live sport

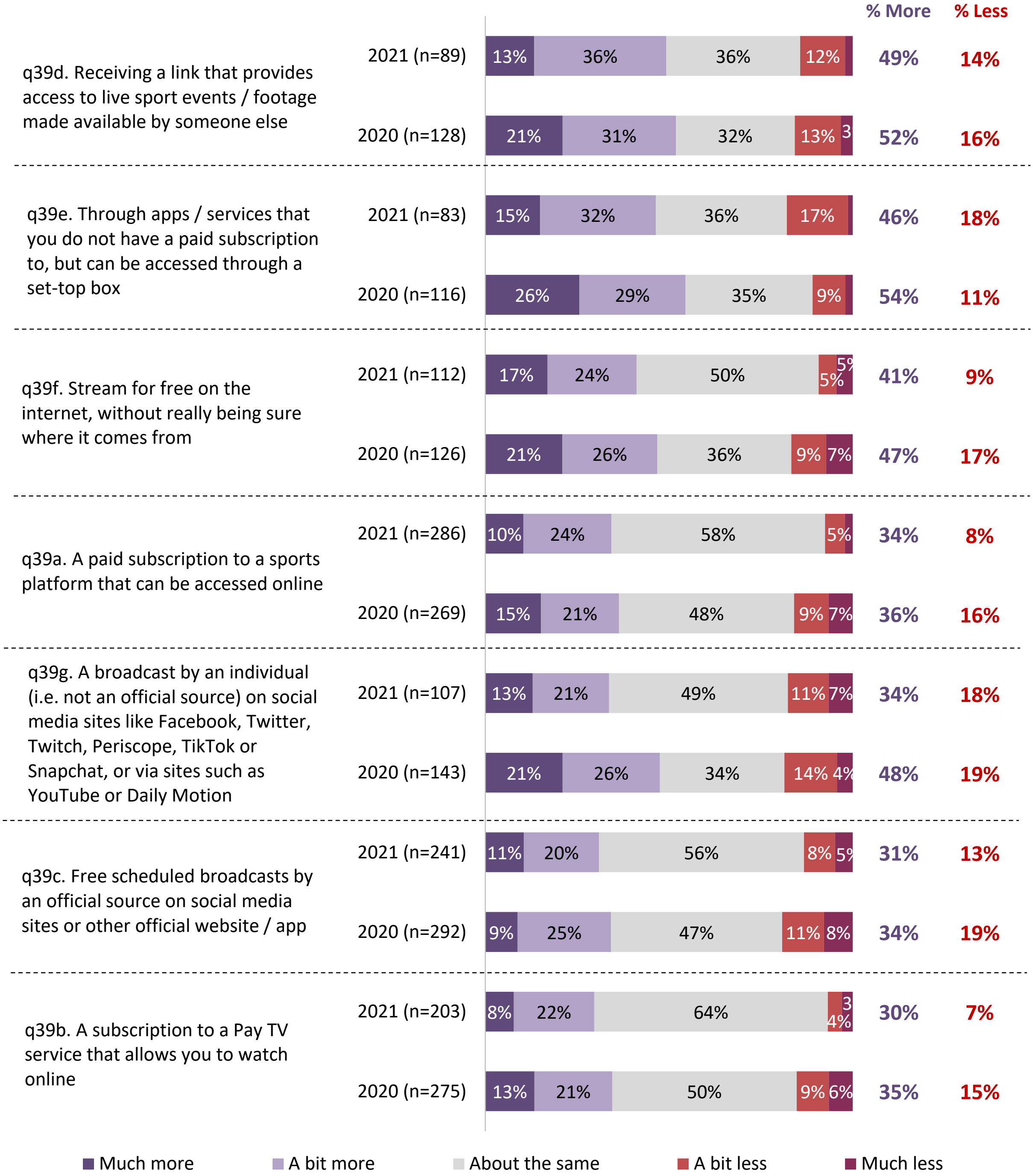
In order to explore any changes in behaviour over time, respondents were asked whether they were using various sources more, less, or about the same as this time one year ago. Figure 30 shows that over two-in-five respondents indicated that they were using the following unlawful sources 'much' or 'a bit' more:

- receiving a link that provides access to live sport events / footage made available by someone else (49%, comparable with 52% in 2020); and
- apps / services they did not have a paid subscription to, but could be accessed through a set-top box (46% down from 54% in 2020, though this difference was not significant due to low sample sizes).

Conversely, lawful sources were generally being used about the same amount, with the proportion of respondents indicating stable usage increasing in 2021 (56%-64%, up from 47%-50% in 2020).

Figure 30: Change in usage of sources to stream / access live sport

Base: Respondents who had streamed / accessed live sport in the past 3 months



Q39. Overall, compared to this time last year, how often are you using these method(s) to stream / access live sport?

Those who indicated they were using a particular method more (n=182) were asked to elaborate on the reasons why. Respondents most commonly reported this was because:

- they were spending more time at home (for example, due to COVID-19) (17%); and
- it was cheaper / free (16%).

Those who indicated they were using a particular method less (n=89) most commonly reported this was because:

- they were less interested in sport at the moment (18%); or
- they lacked the time to watch sport (15%).

Profile of live sport infringers

As outlined earlier, 76% of those who consumed live sport online did so lawfully (non-infringers).

24% consumed live sport from at least some **unlawful** sources (infringers). Of these respondents, 19% through a mix of lawful and unlawful sources, and 5% via only unlawful sources.

Table 19 illustrates key demographic and behavioural differences between the two groups of consumers (infringers and non-infringers of live sport).

Table 19: Profile of live sport infringers versus non-infringers

76%	Non-infringers (all activities lawful) Base: Respondents who consumed live sport online lawfully only (n=417)	24%	Infringers (some / all activities unlawful) Base: Respondents who consumed live sport online unlawfully (n=142)
	Compared to infringers, non-infringers were more likely to be:		Compared to non-infringers, infringers were more likely to be:
	Aged 35 years and over (54%)		Aged 12 to 24 years (45%)
	No substantial differences observed by gender		No substantial differences observed by gender
$	No substantial differences by household income	$	No substantial differences by household income
	Retired (14%)		Student (23%)
	And were more likely to report:		And were more likely to report:
	Streaming TV programs (86%)		Using many sites / services to consume live sport online, excluding Kayo Sports
	Using Kayo Sports to consume live sport online (26%)		Unlawfully consuming music (66%), movies (75%), TV programs (70%), and video games (69%) online

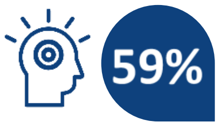
X. Other behaviours

This chapter presents the findings in relation to other behaviours that respondents may have undertaken or experienced online overall, including the use of Virtual Private Networks (VPN), as well as encountering and overcoming blocked websites.

Virtual Private Networks (VPN)

A VPN is a service that connects a computer, smartphone, or tablet to another computer (called a server) somewhere on the internet. This allows individuals to browse the internet using that computer's internet connection and hence access information on that server.

VPNs may be used for a variety of purposes, both lawful and unlawful. You must actively set up a VPN to access another server. Respondents' VPN awareness and usage is outlined below.



of respondents were **aware** of what a VPN service was, up from 50% in 2020[31]; and

indicated that they had **used** a VPN service (comparable with 23% in 2020), including 12% who were currently using a VPN service.

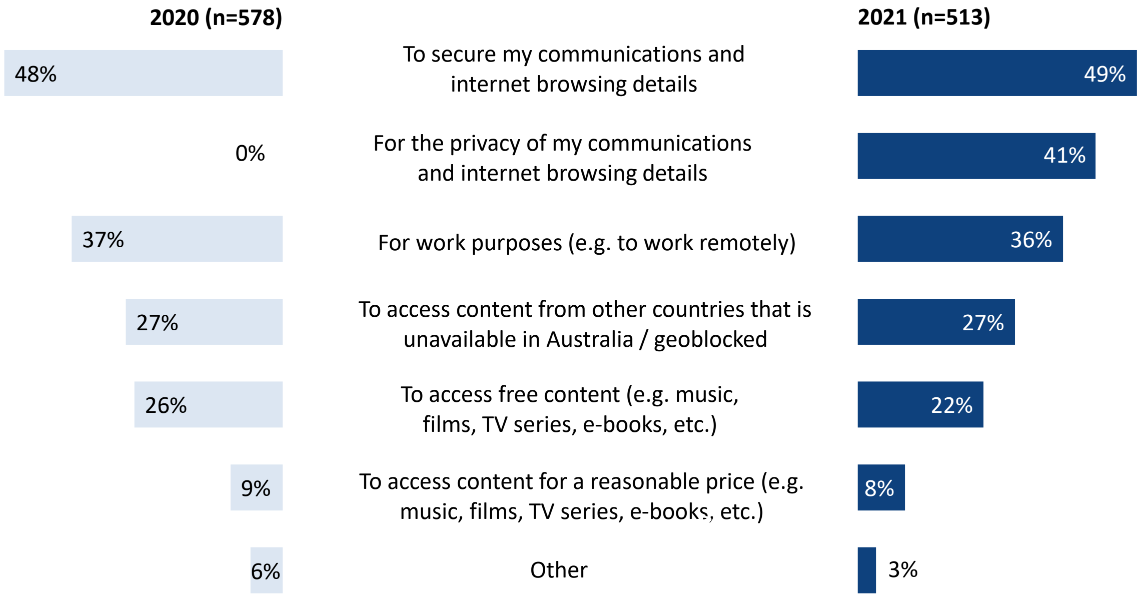
As shown in Figure 31, those who had used a VPN service primarily did so to secure their communications and internet browsing details (49%, in line with 48% in 2020). Over one-in-three respondents reported using a VPN service to protect the privacy of their communications and internet browsing (41%) or for work purposes (e.g. to work remotely – 36%, consistent with 37% in 2020), while around a quarter had used it to access content that they couldn't otherwise from Australia (27%, unchanged from 2020) or to access content for free (22%, versus 26% in 2020).

Respondents who had sourced any online content through unlawful means (infringers) were more likely than non-infringers to have ever used a VPN service – 37% (38% in 2020) compared to 21% for non-infringers (21% in 2020).

[31] In 2020 this was asked as a standalone question (Q54. Have you ever used a VPN service? (n=2,421)) whereas in 2021 this was asked as part of a grid measuring a wider range of behaviours (q52e How familiar are you with the following: Virtual Private Networks (VPN) (n=2,392)).

Figure 31: Reasons for VPN usage

Base: Respondents who had used a VPN service



Q53. Why have you used a VPN service? (Multiple response)

Blocked websites

Website blocking is a mechanism that can be employed to limit access to certain websites, typically based on the location of the user. Overall:

11%

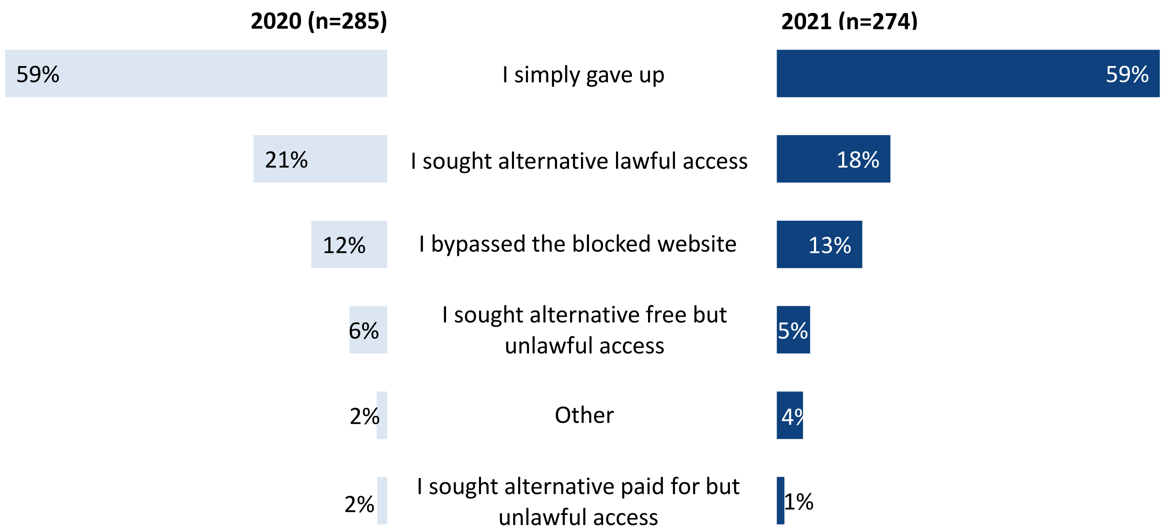
of respondents had **encountered a blocked website** in the past 3 months (in line with 12% in 2020); 74% had not encountered such a site (consistent with 76% in 2020), and 15% were unsure (versus 12% in 2020).[32]

Figure 32 illustrates the actions taken by respondents upon encountering a blocked website in the past 3 months. While the majority reported that they simply gave up (59% in both 2020 and 2021), 18% indicated that they had sought alternative lawful access, and 13% indicated that they had bypassed the blocked website.

[32] Q54. In the past 3 months, have you encountered a blocked website? (n=2,392)

Figure 32: Actions taken when encountering a blocked website

Base: Respondents who had encountered a blocked website in the past 3 months



Q55. Which of the following best describes what you did when you encountered a blocked website?

Among those who had bypassed the blocked website (13% of those who encountered a blocked site, 1% of all respondents):

61% did so using a VPN (versus 47% in 2020), 21% used a proxy website (versus 34% in 2020), 25% used a search engine to find an alternative site versus (27% in 2020), and 3% changed the network proxy in browsers.[33]

[33] Q56. Please indicate how you went about bypassing the blocked website. (Multiple response; n=36)

Furthermore, those who had not encountered a blocked website in the past 3 months were asked what they would do if they were to be faced with such a scenario. As was the case for those who had experienced this, most claimed they would just give up (72% versus 71% in 2020), and 20% reported that they would seek alternative lawful access (versus 20% in 2020).[34] The most popular methods people would use to bypass blocked websites would be to use a search engine to find an alternative site (54% versus 53% in 2020), use a VPN (37% versus 31% in 2020) or using proxy websites (22% versus 16% in 2020).[35]

Respondents who had sourced any online content through unlawful means (infringers) were:

- more likely than non-infringers to have encountered a blocked website in the past 3 months (22% versus 8%; compared to 21% versus 8% in 2020);
- less likely to have simply given up upon encountering a blocked website (41% versus 77%; compared to 47% versus 71% in 2020); and
- less likely to indicate that they would use a search engine to find an alternative site as a way to bypass a blocked website, should they encounter one (45 versus 54%; compared to 44% versus 68% in 2020).

[34] Q57. What would you do if you encountered a website which had been blocked? (Multiple response; n=2,118)
[35] Q58. Please indicate how you would go about bypassing the blocked website. (Multiple response; n=140)

XI. Motivators and attitudes

This chapter presents a series of findings in relation to online behaviours and explores what it is that motivates respondents to behave in certain ways online, as well as their underlying attitudes.

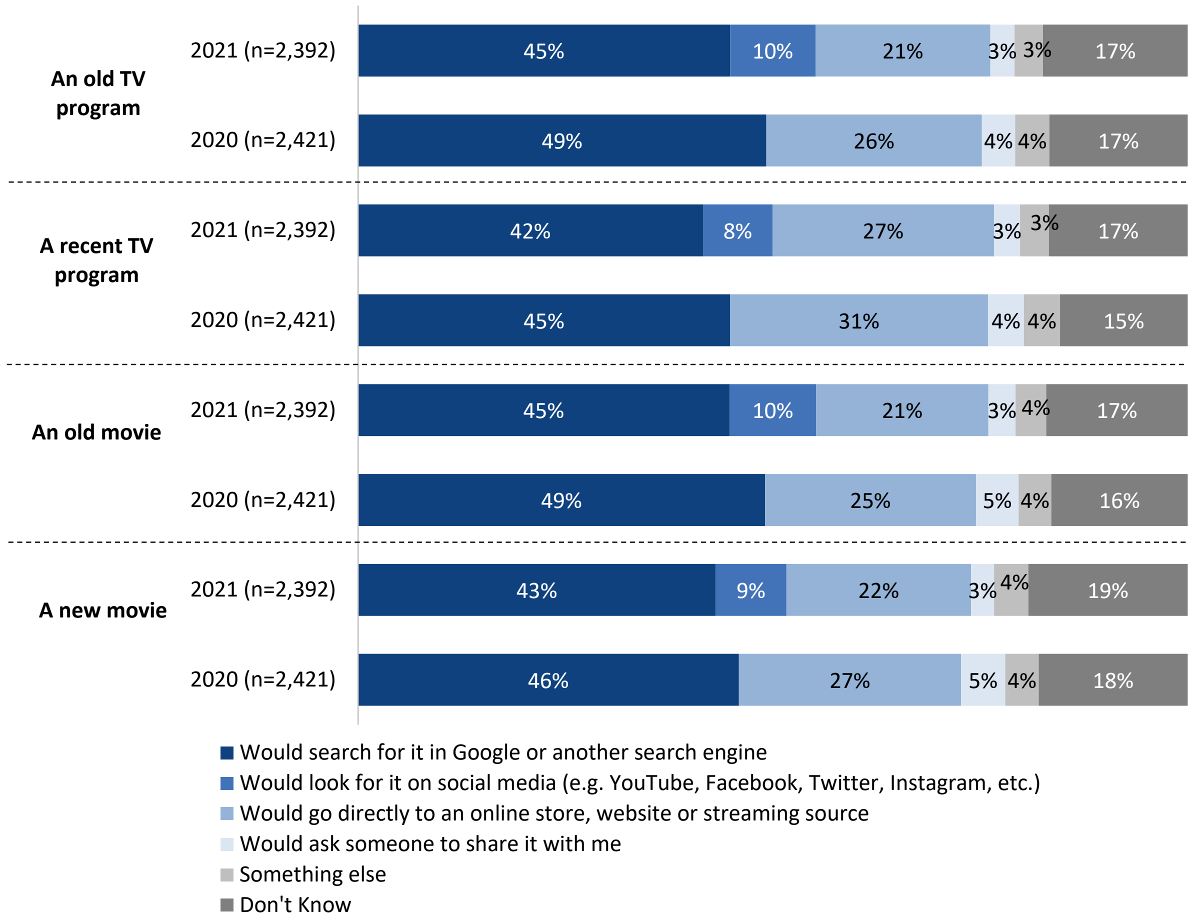
Access to new content

To further understand online behaviours, respondents were asked to indicate how they might **first** go about trying to find new content.

Google search (or search via another search engine) was by far the most common method reported by respondents across all content types (36%-45% said they would do this, versus 38%-52% in 2020 – see Figure 33). The next most common method, particularly for movies and TV content, was to go directly to an online store, website or streaming source (10%-27%, versus 13%-31% in 2020). A notable proportion also indicated that they 'don't know' how they would find new content, particularly in relation to video games and sports (17%-37%, versus 31%-38% in 2020).

Figure 33: Ways to go about finding new content not previously accessed (TV / movie / film content)

Base: All respondents

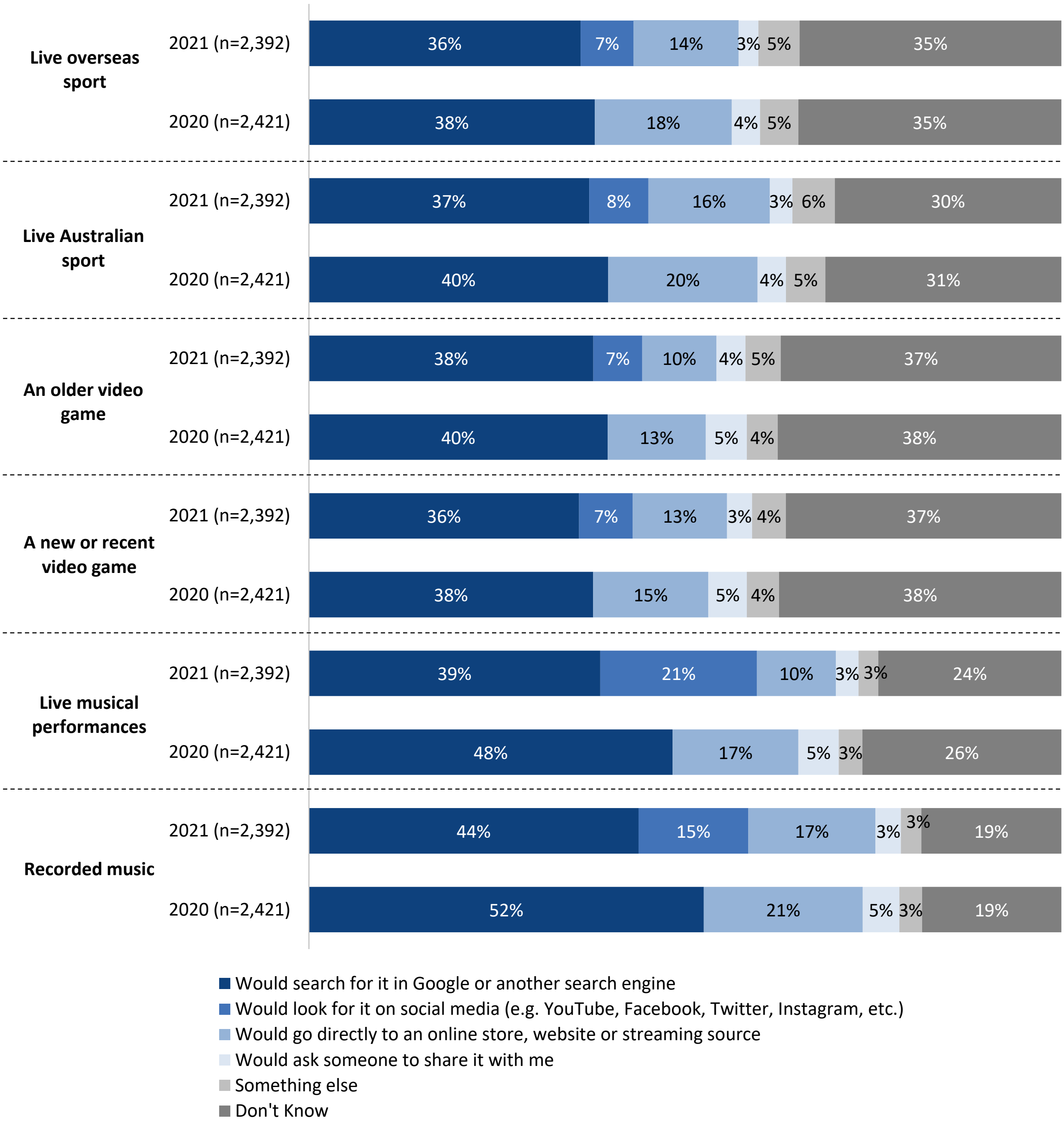


Q59. Imagine you were looking to find some specific new content that you had heard about. For each of these content types, how would you first go about trying to find it?

Plase note: 'Would look for it on social media' was added as an option in 2021.

Figure 34: Ways to go about finding new content not previously (sports, gaming, or music content)

Base: All respondents



Q59. Imagine you were looking to find some specific new content that you had heard about. For each of these content types, how would you first go about trying to find it?

Plase note: 'Would look for it on social media' was added as an option in 2021.

Access to unlawful content

Much of the content that Australians can access online is lawful, which broadly means it is content that has not been unlawfully copied or accessed in ways that infringe copyright laws. Despite this, individuals may come across unlawful content online even without actively seeking it.

Confidence

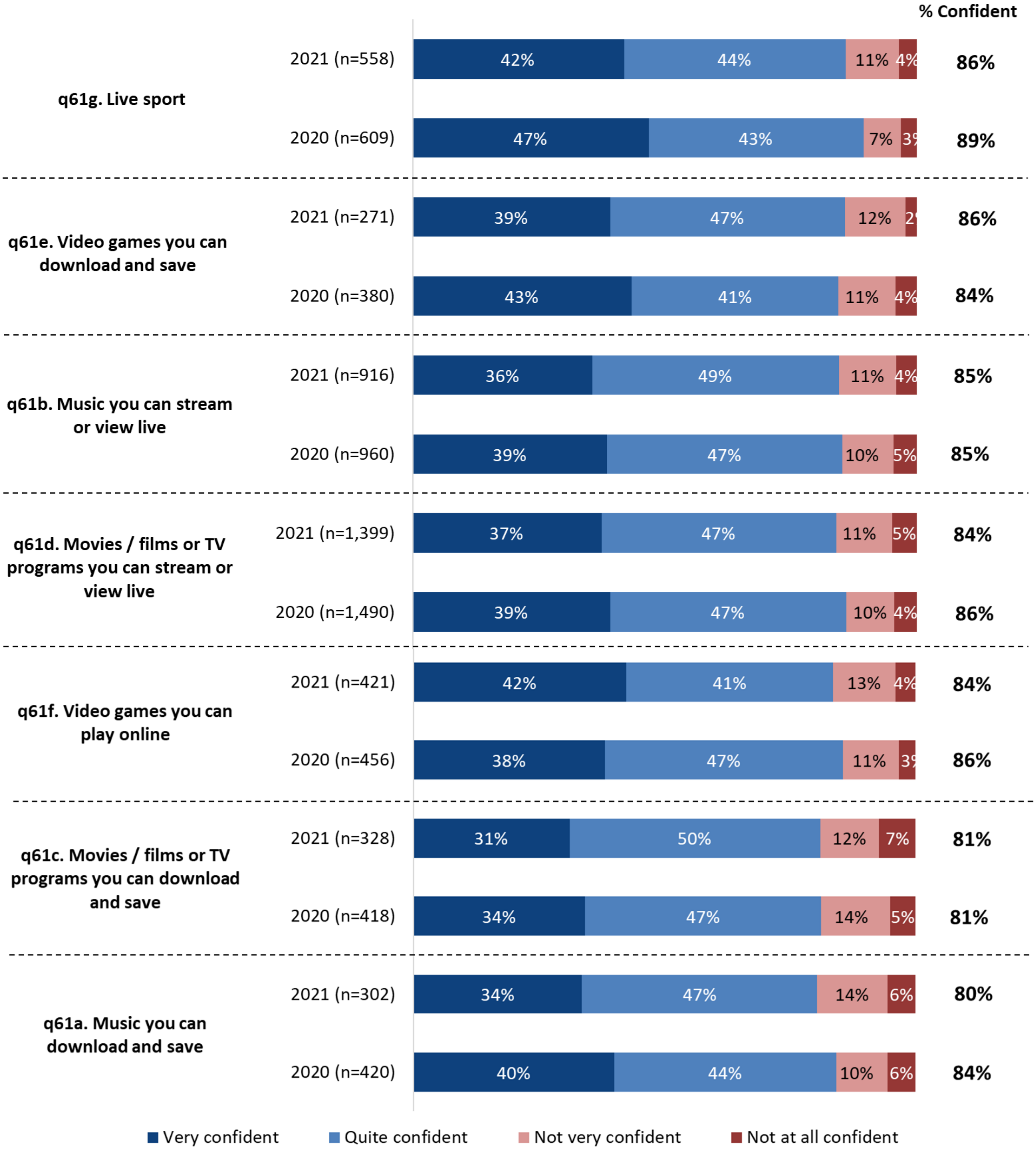
As shown in Figure 35, most respondents were confident that they would be able to identify whether online content was lawful or unlawful, with 31%-42% being very confident across all content types (versus 34%-47% in 2020). Overall, 29% of all respondents said they were very confident in knowing that at least one of the presented options was lawful or unlawful online (versus 33% in 2020).

There were some minor differences to note, however, with respondents being slightly:

- less confident in their ability to identify whether movies / films or TV programs you can download and save was lawful or unlawful (31% said 'very' confident, versus 34% in 2020);
- more confident in their ability to identify the lawfulness of playing video games online (42% said 'very' confident, versus 38% in 2020).

Figure 35: Confidence in identifying what content is lawful or unlawful online

Base: Respondents who had consumed each content type online in the past 3 months



Q61. When you access the following content online, generally how confident are you that you can tell what is lawful and what is unlawful? (‘Don’t know’ excluded).

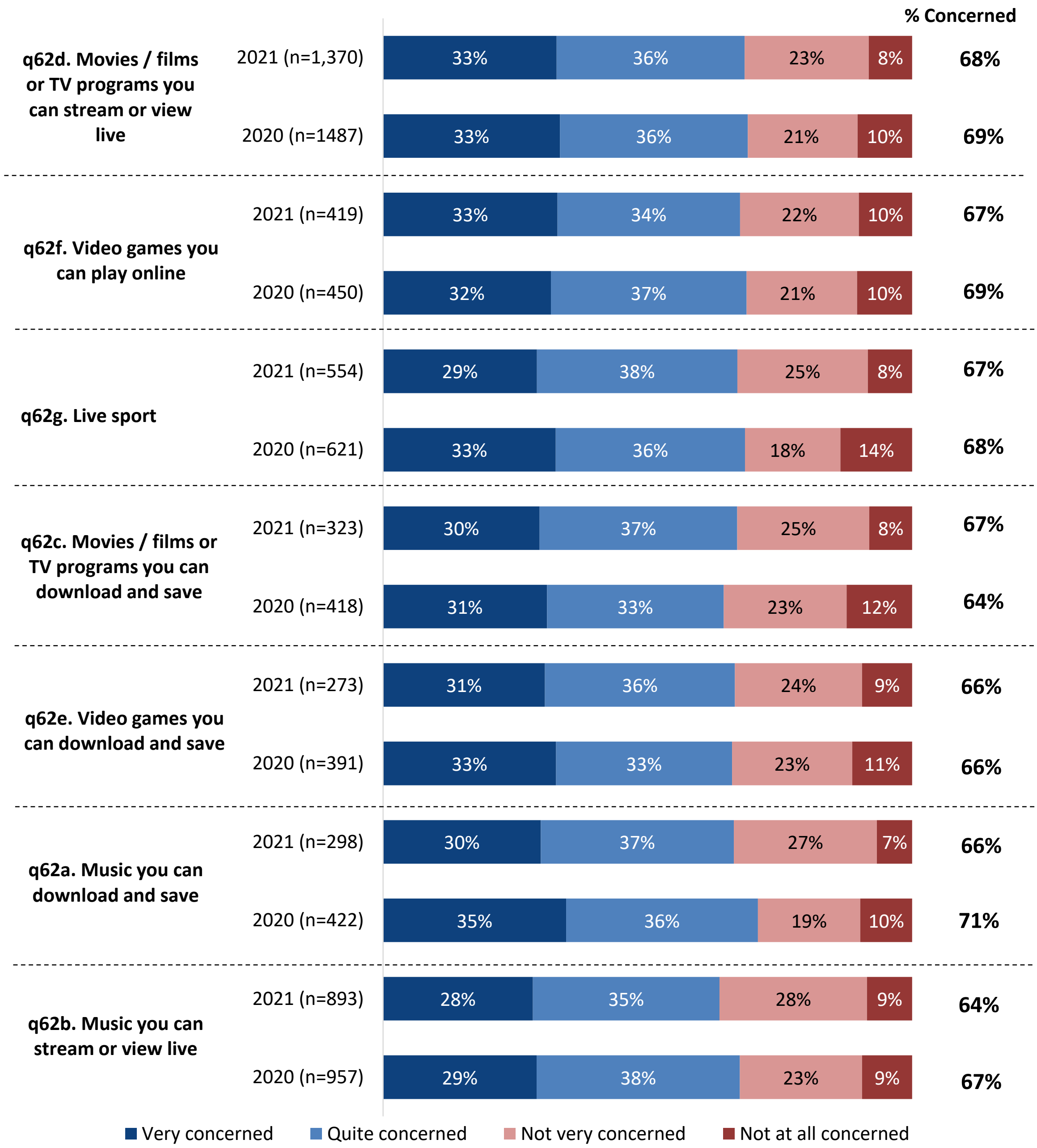
Concern

Figure 36 illustrates that over three-in-five respondents said they would be concerned if they were to access online content unlawfully (64%-68% in total said 'very' or 'quite' concerned, across all content types, versus 64%-71% in 2020). Overall, 24% of all respondents said they would be very concerned if they accessed at least one of the content types unlawfully (versus 27% in 2020).

Concern was highest in relation to unlawful access of movies or TV programs you can stream or view live (68% in total said 'very' or 'quite' concerned), and lowest in relation to music you can stream or view live (64% in total said 'very' or 'quite' concerned).

Figure 36: Concern if accessed unlawful content online

Base: Respondents who had consumed each content type online in the past 3 months



Q62. To what extent would you be concerned if you accessed any of the following unlawfully? ('Don't know' excluded)

Respondents who indicated that they would be very concerned about accessing content unlawfully in relation to at least one content type were asked why they felt that way. Overall results were mixed, as follows:

68% I don't think that it's right (versus 67% in 2020)[36]

45% I want to support creators / industry (versus 50% in 2020)

58% Files may have viruses / malware / spyware (versus 62% in 2020)

41% I might be caught / punished (versus 43% in 2020)

Behaviour change

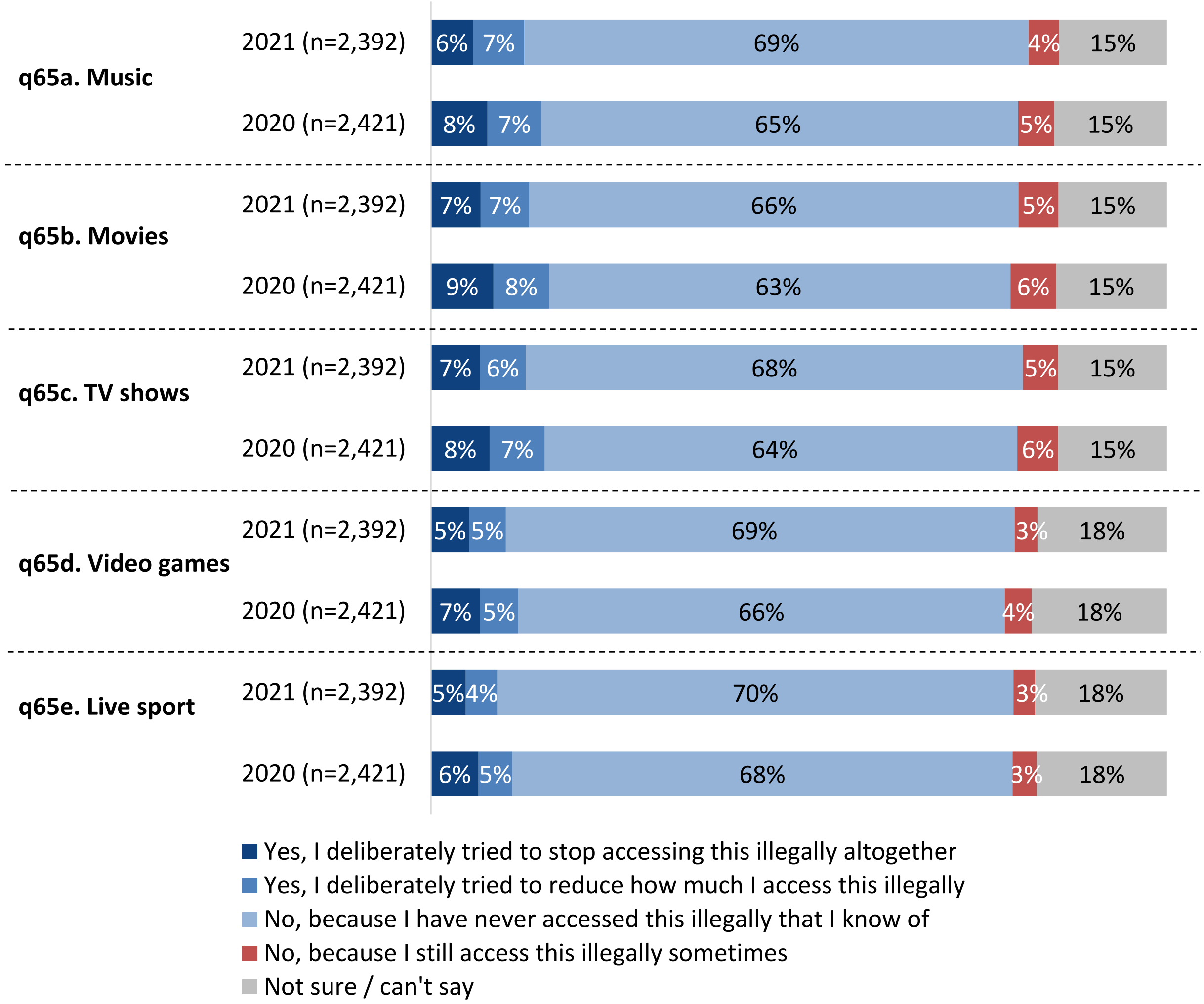
Results from previous surveys suggest that there has been some behaviour change among Australians in relation to accessing unlawful content online since 2015. To understand this further, in 2020 and again in 2021, respondents were asked about whether they had made a conscious decision in the past 5 years to reduce or stop accessing various content types online in ways that they thought might be unlawful.

Overall, the results were similar across content types, with 66%-70% of respondents indicating that they had **not** made such a decision (versus 63%-68% in 2020), as they had never accessed content unlawfully that they know of (see Figure 37). Despite this, a minority did claim to have deliberately tried to reduce or stop accessing each content type unlawfully (9%- 13%, versus 11%-16% in 2020). Interestingly, 3%-5% (versus 3%-6% in 2020) acknowledged that they know they access content unlawfully sometimes.

[36] Q63. Why would you be concerned about accessing such content unlawfully? (n=667)

Figure 37: Behaviour change in relation to accessing content that might be unlawful

Base: All respondents



Q65. In the past 5 years, have you made a conscious decision to reduce or stop accessing the following content types online in ways that you thought might be unlawful?

Those who indicated that they had deliberately tried to reduce or stop accessing any content unlawfully in the past 5 years were asked to elaborate on what had prompted this behaviour. The most frequently cited reasons included:

- feeling concerned about getting caught (25%);
- feeling guilty / unethical (12%);
- desired content becoming available in legal ways / being happy to pay for content (9%);
- concerns about online security (9%); and
- wanting to support content creators / the industry (8%).

Perceptions of lawfulness

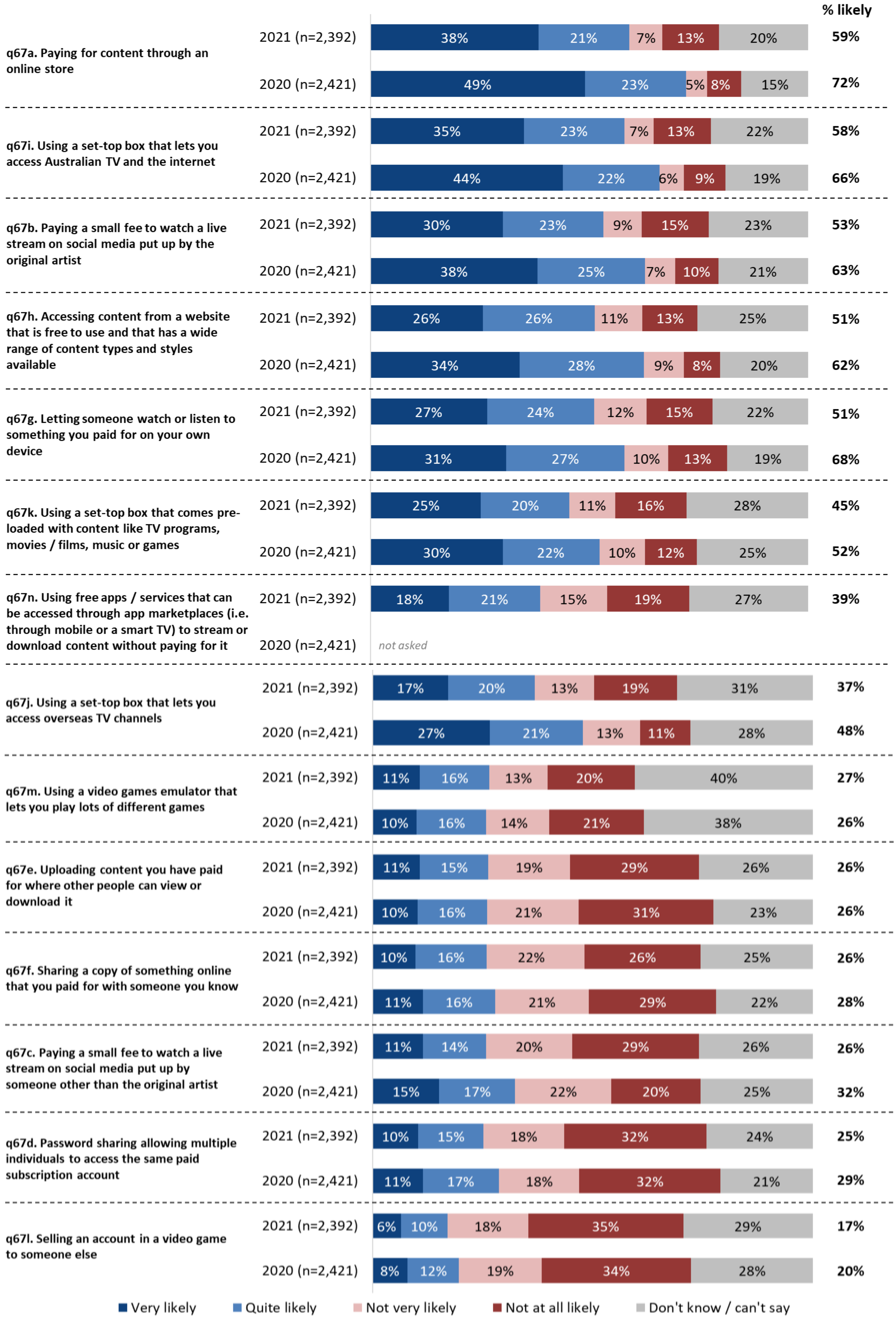
Respondents were asked to rate how likely they felt it was that a range of activities were lawful in Australia (see Figure 38).

The following were most likely to be perceived to be lawful:

- paying for content through an online store (59% in total said 'very' or 'quite likely', versus 72% in 2020);
- using a set-top box that lets you access Australian TV and the internet (58% in total said 'very' or 'quite likely', versus 66% in 2020); and
- paying a small fee to watch a live stream on social media put up by the original artist (53% in total said 'very' or 'quite likely', versus 63% in 2020).

Figure 38: Perceptions of lawfulness of different activities

Base: All respondents



Q67. In general, how likely do you think it is that the following things are lawful in Australia?

Some were unsure about whether each activity was lawful (20%-40%, versus 15%-38% in 2020), particularly use of a video games emulator (40% unsure, versus 38% in 2020), using a set-top box that lets you access overseas TV channels (31%, versus 28% in 2020), and selling an account in a video game to someone else (29%, versus 28% in 2020).

Perceptions of the lawfulness of activities varied by certain demographic characteristics.

In general, those **aged between 12 and 24,** and **25 and 34** were more likely to indicate that activities were likely to be lawful compared to older age groups.

Males were more likely to perceive activities as likely to be lawful than females, particularly those involving payment of a fee and using set-top boxes. However, these differences were generally due to greater proportions of females being unsure about the lawfulness of activities, rather than lower perceived lawfulness of each activity.

Those in households earning **over $80,000** generally felt that many activities were more likely to be lawful than those earning $80,000 or less.

Results did **not differ substantially** by employment status, though **students** were generally more likely than others to think that most activities were likely to be lawful.

Familiarity with online terms

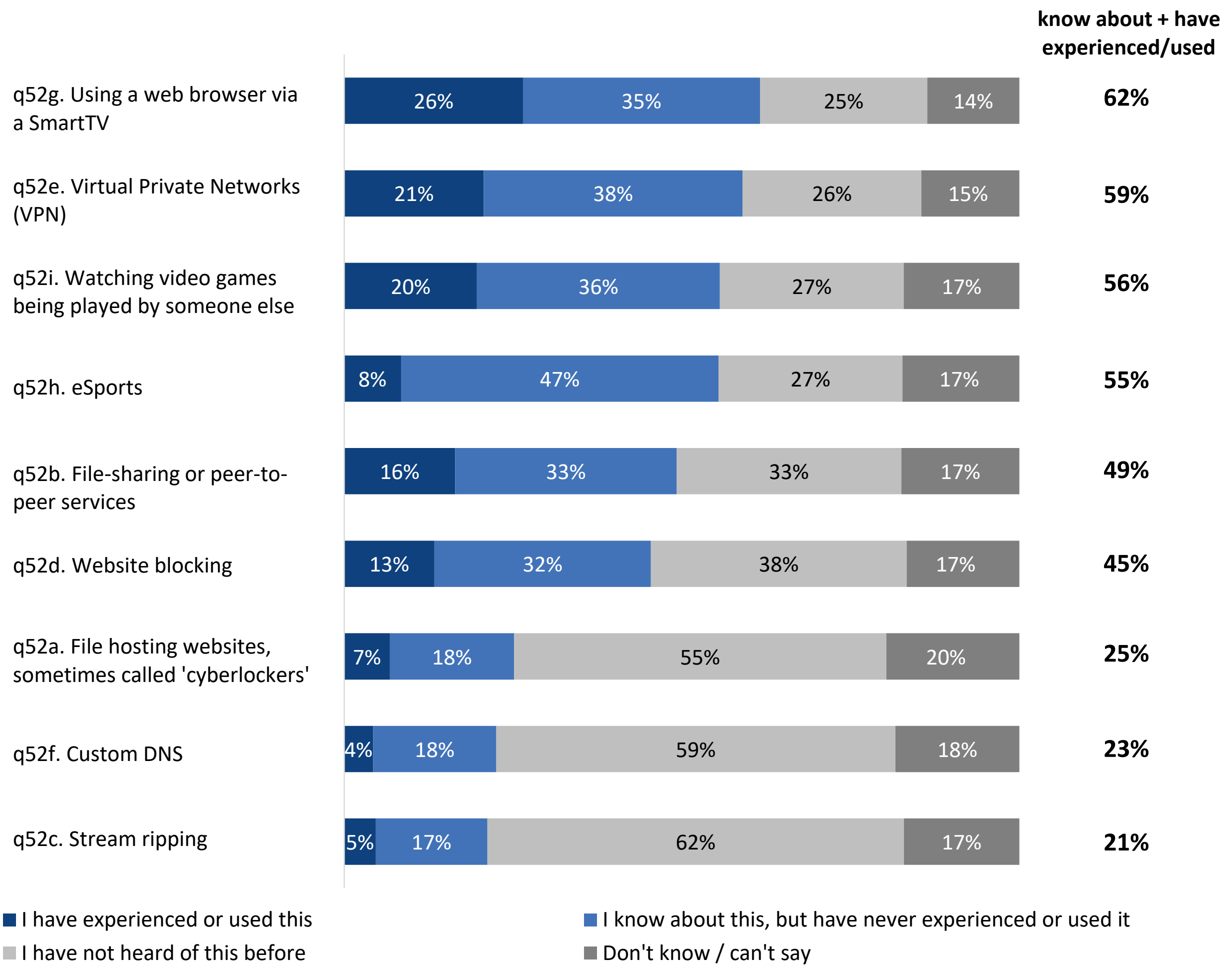
Respondents were most familiar with the terms using a web browser via a smart TV and Virtual Private Networks (VPN) (62% and 59% had heard of these respectively), and were also most likely to have used or experienced these (26% and 21% respectively).

In contrast, respondents reported less familiarity with file hosting websites (25% had heard of this), stream ripping (21%) and Custom DNS (23%). Furthermore, only a minority of respondents had used d or experienced these (7%, 5% and 4% respectively).

While the majority of respondents had heard of eSports (55%), only a small minority have experience with eSports (8%).

Figure 39: Familiarity with online terms, 2021

Base: All respondents (n=2,392)



Q52. How familiar are you with the following?

Familiarity with online terms varied by certain demographic characteristics.

Respondents aged between **12 and 24**, and **25 and 34** were more likely to be familiar with all terms compared to older age groups.

Males were more likely than females to know about all terms except **file hosting websites** and **stream ripping.**

Respondents in households earning **over $80,000** were more likely than those earning less to have experience with most terms, especially with **file sharing, VPN,** and **using a web browser via a SmartTV**.

Both **students** and those working **full-time** were generally more likely than many others to know about all terms.

Likelihood of accessing content unlawfully

Respondents were asked about whether they would be more or less likely to access content online in ways that are unlawful, when considering a number of factors (see Figure 40).

Around two-in-five respondents (34%-45%) indicated that each factor would make no difference to their likelihood of accessing content online in unlawful ways. Notable proportions were also unsure (18%-23%).

Respondents indicated that they were less likely or much less likely to access content online unlawfully if:

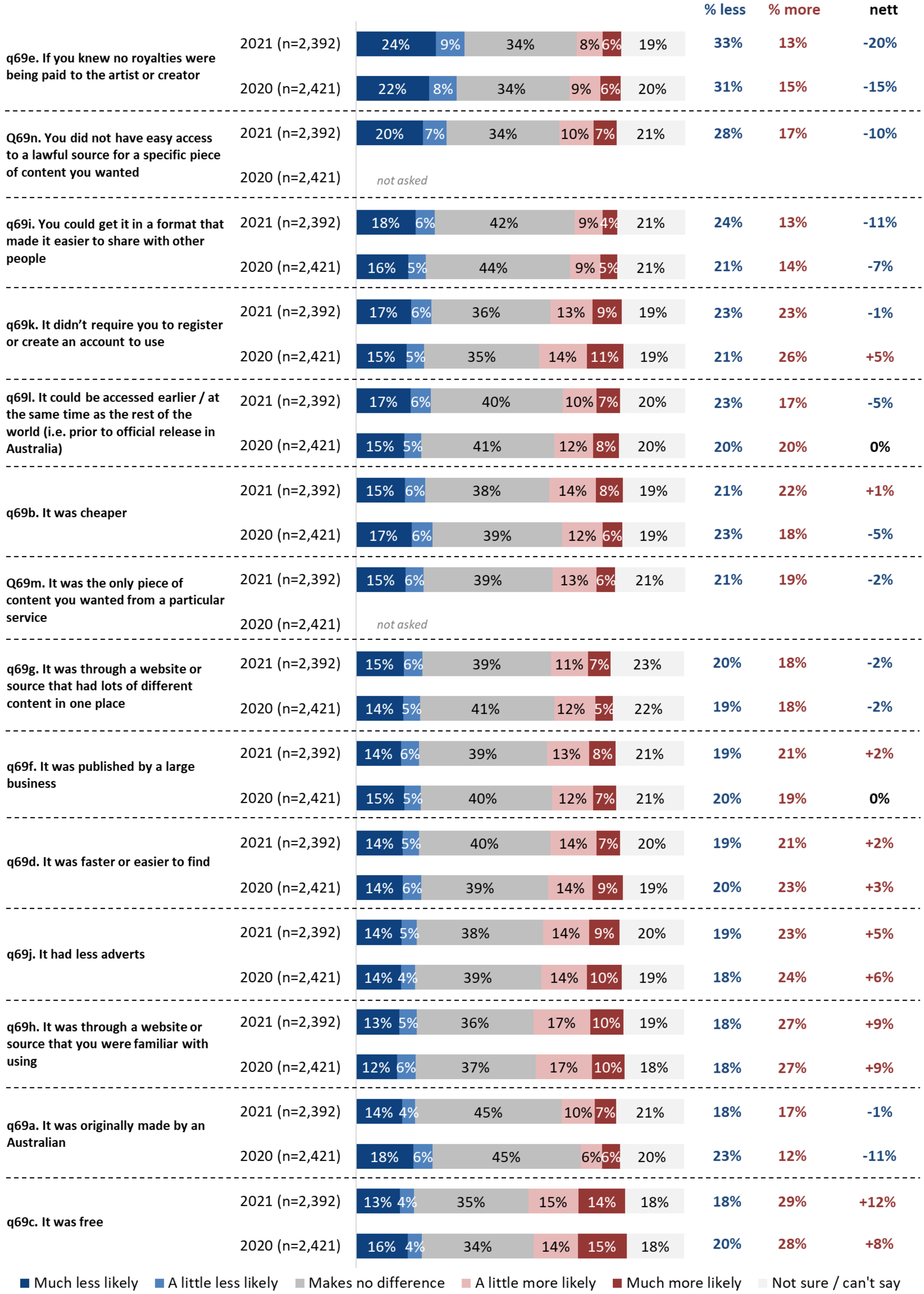
- they knew no royalties were being paid to the artist or creator (33% in total said 'less likely');
- You could get the content in a format that made it easier to share with other people (24% in total said 'less likely'); or
- It didn't require you to register or create an account to use (23% in total said 'less likely', though 22% also indicated that this would make them 'more likely' to access content unlawfully).

In contrast, respondents indicated that they would be more likely to access content online unlawfully if it was free (29% 'more' or 'a little more' likely), or if it was through a website or source that they were familiar with using (27%).

These findings were largely consistent with last years' results.

Figure 40: Likelihood of accessing content unlawfully under different circumstances

Base: All Respondents



Q69. Would you be more/less likely to access such content online in ways that you think might be unlawful if...?

Likelihood of accessing online content unlawfully varied somewhat by certain demographic characteristics.

A greater proportion of respondents aged between **12 and 24**, and **25 and 34** indicated they would be more likely to access content unlawfully for all conditions, compared to older age groups.

Males were generally more likely than females to report increased likelihood of accessing content unlawfully for each condition.

Higher income households were generally more likely to report increased likelihood of accessing content unlawfully for each condition.

Those working in **full-time** or **part-time** employment were generally more likely than others to report increased likelihood of accessing content unlawfully for many conditions.

At the end of the survey respondents were also asked about when they would consider it OK to obtain online content in ways that they knew to be, or thought were likely to be unlawful.

- A little over half of respondents (57%) felt that it would never be ok to access content online if its lawfulness was in doubt.
- A further 15% of respondents simply didn't know whether it would ever be ok.
- Among the remaining 28%, most commonly cited circumstances under which they felt it would be ok to access content unlawfully included when:
  - there were no lawful ways of obtaining the content in Australia (5%);
  - 'everyone else' (i.e. friends / family) was accessing content unlawfully (2%); and
  - they feel like it – it's ok to access content unlawfully at any time (2%).

XII. Factors associated with lawful consumption

The primary objective of the research was to understand the prevalence of copyright infringement behaviours in Australia and how this is changing over time. These findings are detailed in the main body of the report. In addition to the main objectives, the research was also interested to explore what factors may be associated with lawful or unlawful consumption. To this end, several hypotheses were tested in the analysis of the 2021 data.

This chapter presents the findings from this additional analysis on relationships with lawful consumption of online content.

These initial insights suggest that there may be some relationship between lawful content consumption, knowledge of ways to access content online, and availability of subscription and streaming services – highlighting these as potential areas for exploration in future research.

Graduated lawfulness of consumption – a more nuanced year on year view

Up to this point, lawful consumption of online content has been viewed in the survey reports as a dichotomy, where respondents who had streamed or accessed content online in the past three months were categorised as either “infringers” or “non-infringers” (those who did not consume any online content, or did so it other ways than those listed were excluded from the categorisation).

Given the complexity of the online content landscape, an additional lawfulness categorisation was created in 2021 to provide a more nuanced view of consumption behaviours – allowing for clearer differentiation between those who consume content in ways that are only lawful, potentially unlawful, or probably unlawful, and those who do not consume content online at all (or the small proportion who only do so in ways other than those considered by this research). This graduated categorisation of consumption lawfulness has been retrospectively applied to last years’ data to show changes year on year.

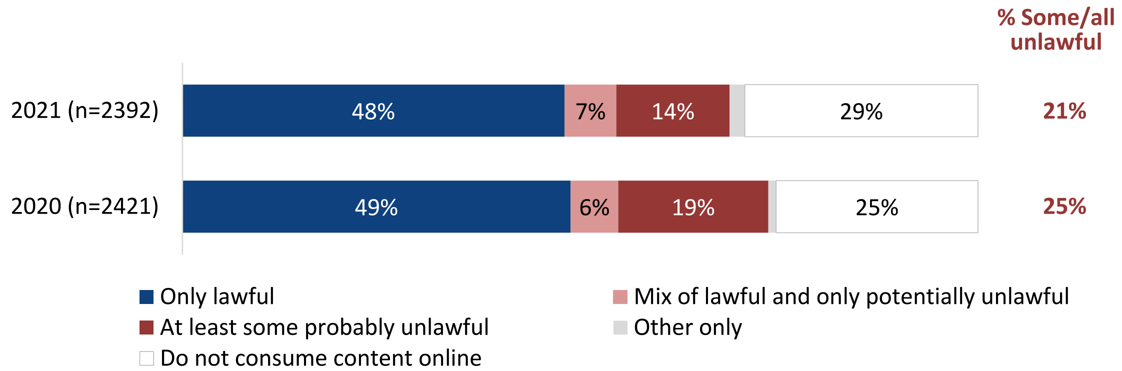
Overall

When considered in this way, in the 2021 data 48% of respondents consumed online content in only lawful ways, 7% used a combination of lawful plus at least one potentially unlawful way, and 14% used at least one probably unlawful way to consume content. 29% did not consume any on line content, and 2% used only ways that were not able to be classified.

As shown in Figure 4, 2021 saw a fall in online content consumption generally compared to the previous year. Positively, levels of lawful content consumption remained largely unchanged since last year, and it was unlawful content consumption that declined, with fewer respondents indicating that they had accessed online content in ways that were probably unlawful.

Figure 41: Graduated lawfulness of online content consumption, 2020-2021

Base: All respondents



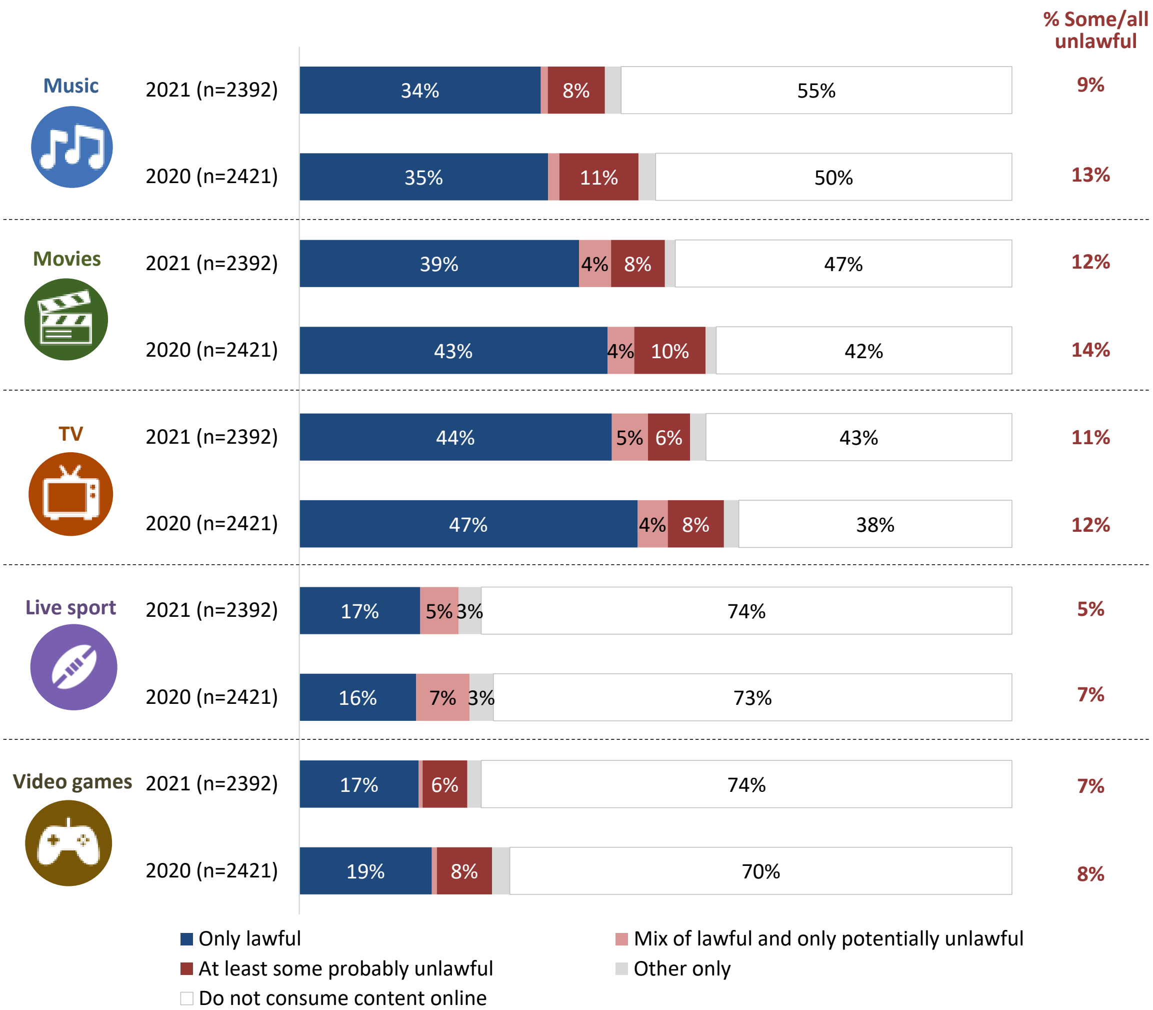
Q. How is the way that you download/stream/access music/movies/TV/sport/online games typically split across the following? (Enter percentage of time for each [methods/source/option])

Media type

Across media types, consumption patterns largely reflect the pattern of results at the overall level. In 2021 fewer people consumed each type of media online compared to last year, and for music overall levels of lawful consumption remained largely consistent year on year, while unlawful consumption declined. For movies and TV there were small declines in the proportion reporting only lawful consumption as well as probably unlawful consumption.

Figure 42: Graduated lawfulness of online content consumption, by media type, 2020-2021

Base: All respondents



Q. How is the way that you download/stream/access music/movies/TV/sport/online games typically split across the following? (Enter percentage of time for each [methods/source/option])

Lawfulness and media consumption behaviours

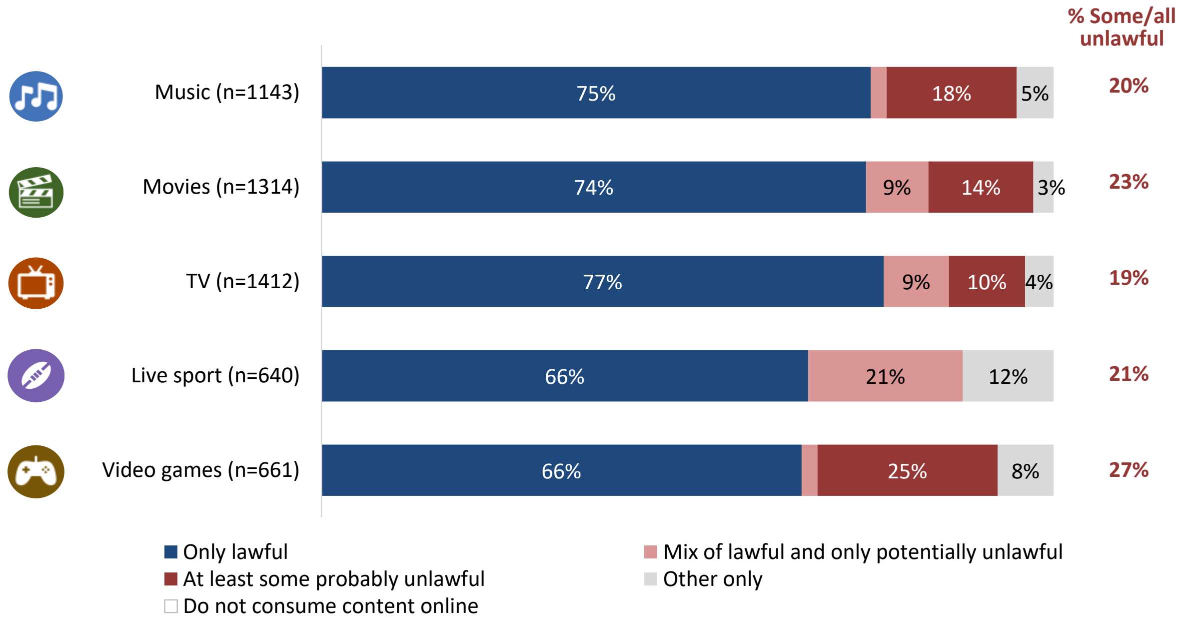
Certain types of online consumption behaviours were associated with lawfulness of consumption. Specifically, higher rates of unlawful consumption was observed among those accessing video games, and music. On the other hand, lawful consumption was associated with greater use of subscription services to access content.

Media type

Comparing consumers of different media types, those who accessed video games and live sport online were least likely to do so only lawfully, while those who accessed video games and music were most likely to do so in ways that were probably unlawful.

Figure 43: Graduated lawfulness of online content consumption, by media type, 2021

Base: Respondents who consumed content online in the past 3 months (across each specific media type)



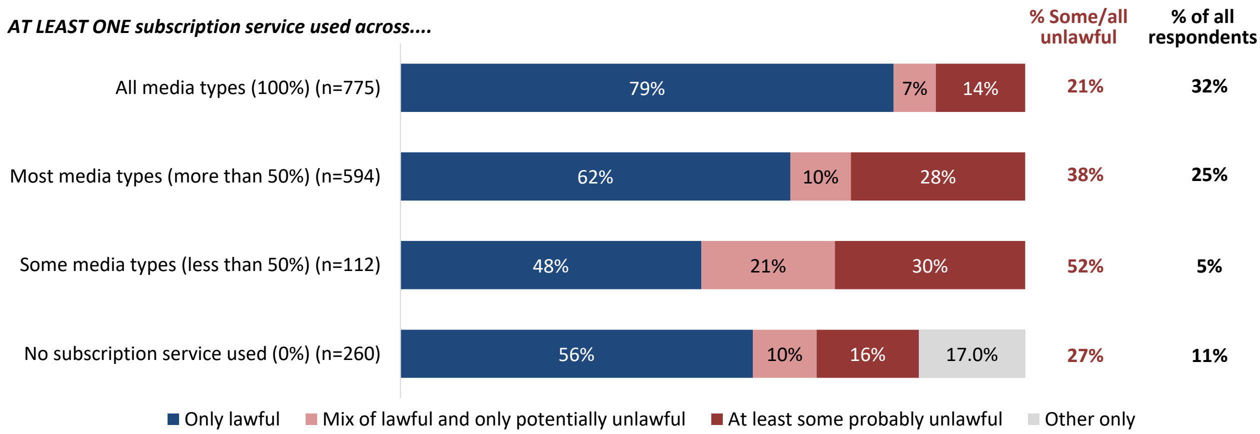
Q. How is the way that you download/stream/access music/movies/TV/sport/online games typically split across the following? (Enter percentage of time for each [methods/source/option])

Use of subscription services

Higher use of subscription services was associated with greater lawfulness of content consumption. Subscription use across media types was common, with only 11% of respondents indicating that they did not use any subscription services at all.

Figure 44: Graduated lawfulness of online content consumption, by use of ANY subscription services across media types consumed, 2021

Base: Respondents who consumed content online in the past 3 months (across any media type)



Q. How is the way that you download/stream/access music/movies/TV/sport/online games typically split across the following? (Enter percentage of time for each [methods/source/option])

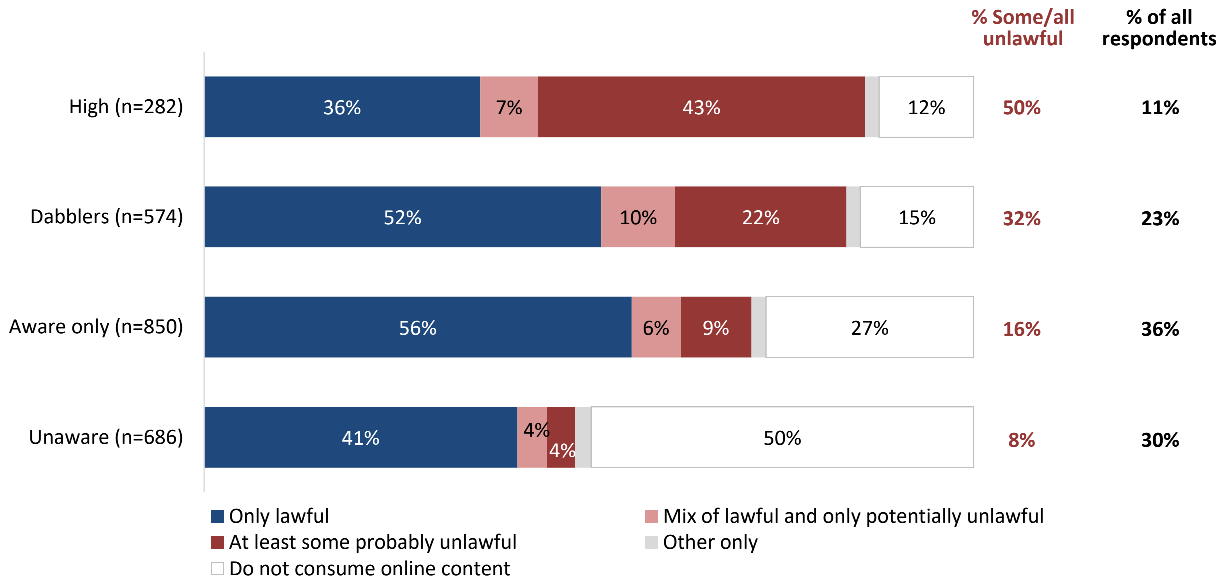
Lawfulness of consumption and technological savviness

Respondents' savviness was estimated based on their familiarity with a range of technical elements (e.g. VPN, website blocking, custom DNS etc. – for details see Familiarity with online terms section in the Motivators and Attitudes chapter of the main report). Respondents who had knowledge and experience of multiple technological elements were classed as possessing 'high savviness', those who had knowledge but only limited experience of multiple aspects were categorised as 'dabblers', those who had some knowledge but no personal experience of these elements were categorised as 'aware only', and those who with limited familiarity with the elements were classified as 'unaware'.

Given the complex and evolving nature of the online environment, it is perhaps unsurprising that technological savviness was found to be strongly associated with lawfulness of consumption. Higher levels of savviness were associated with higher levels of unlawful content consumption. In fact, those with the highest levels of savviness were more likely to access content in ways that are probably unlawful than not. However, these individuals form a relatively small group, representing a little over one-in-ten of all respondents.

Figure 45: Graduated lawfulness of consumption, by technological savviness, 2021

Base: All respondents



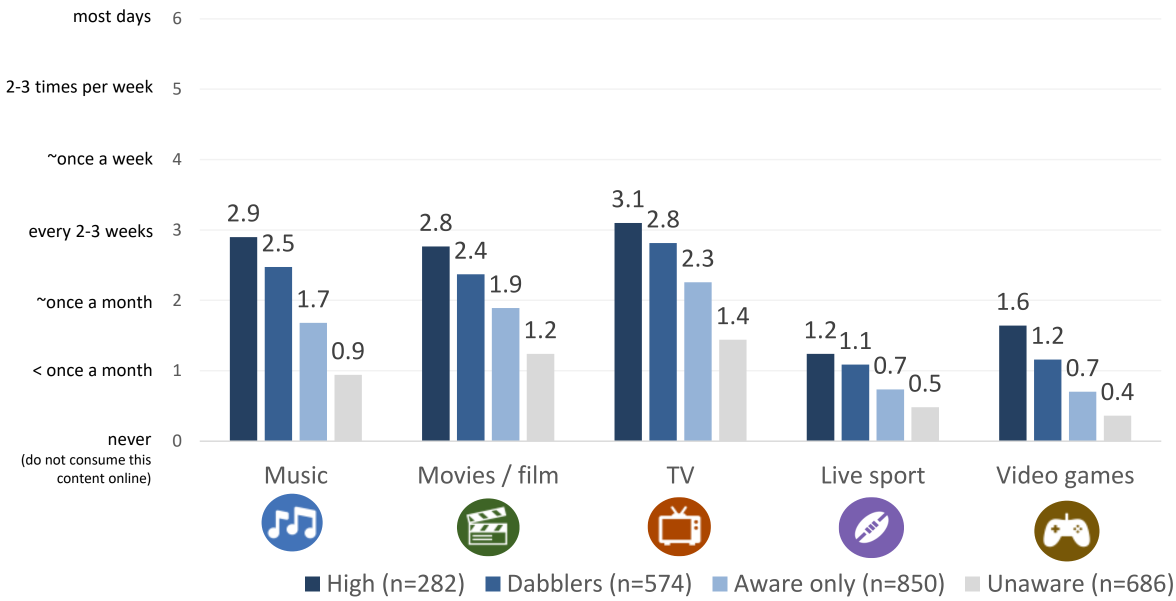
Q. How is the way that you download/stream/access music/movies/TV/sport/online games typically split across the following? (Enter percentage of time for each [methods/source/option])

Compared to those less familiar with the navigating the online content environment, highly savvy individuals were also more likely to:

- be frequent consumers of online content across all media types (see Figure 46);
- feel confident that they can correctly identify lawful and unlawful ways of accessing content (see Figure 47);
- feel less concerned about accessing content in unlawful ways (also shown in Figure 47); and
- knowingly continue to access content unlawfully, indicating that they access at least some content unlawfully, and have taken limited or no conscious action to stop or reduce unlawful consumption in the past 5 years (see Figure 48).

Figure 46: Average frequency of media consumption online, by media type and technological savviness, 2021

Base: All respondents



Q. Generally, how often do you stream/download/access [media type] through the internet?

Figure 47: Confidence and Concern Indices, by technological savviness, 2021

Base: All respondents, n=2392

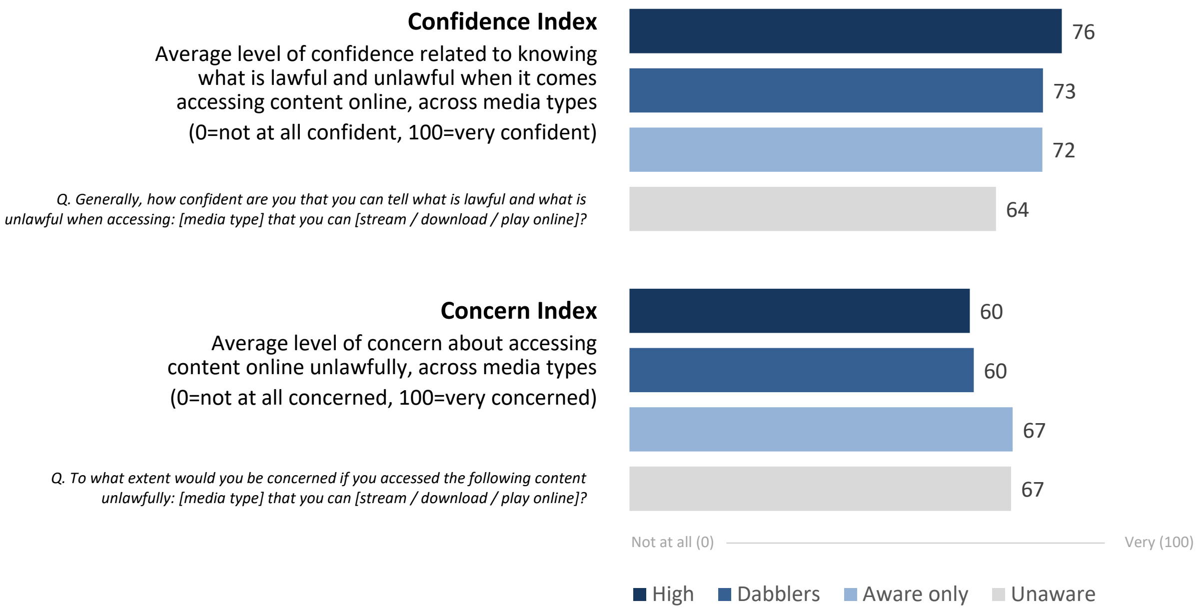
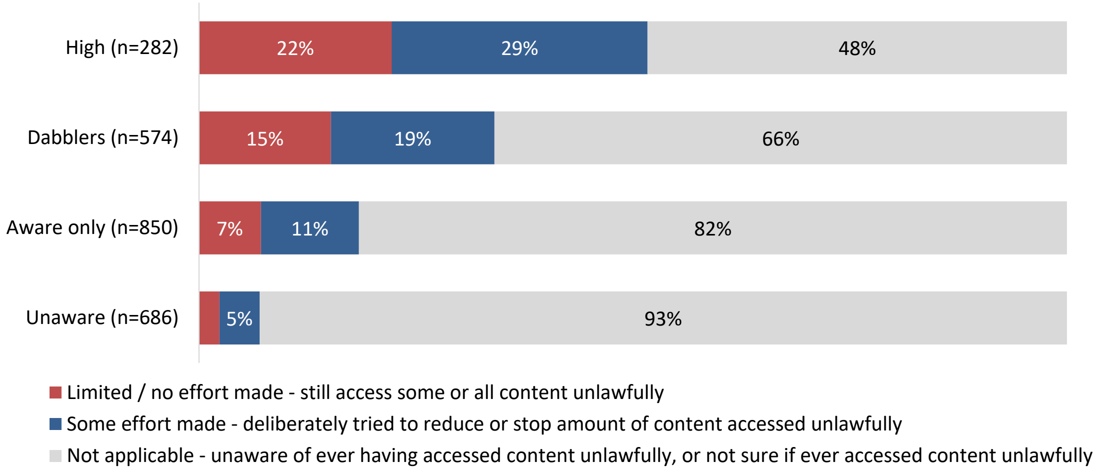


Figure 48: Conscious effort made in the past 5 years to reduce unlawful consumption, by technological savviness, 2021

Base: All respondents



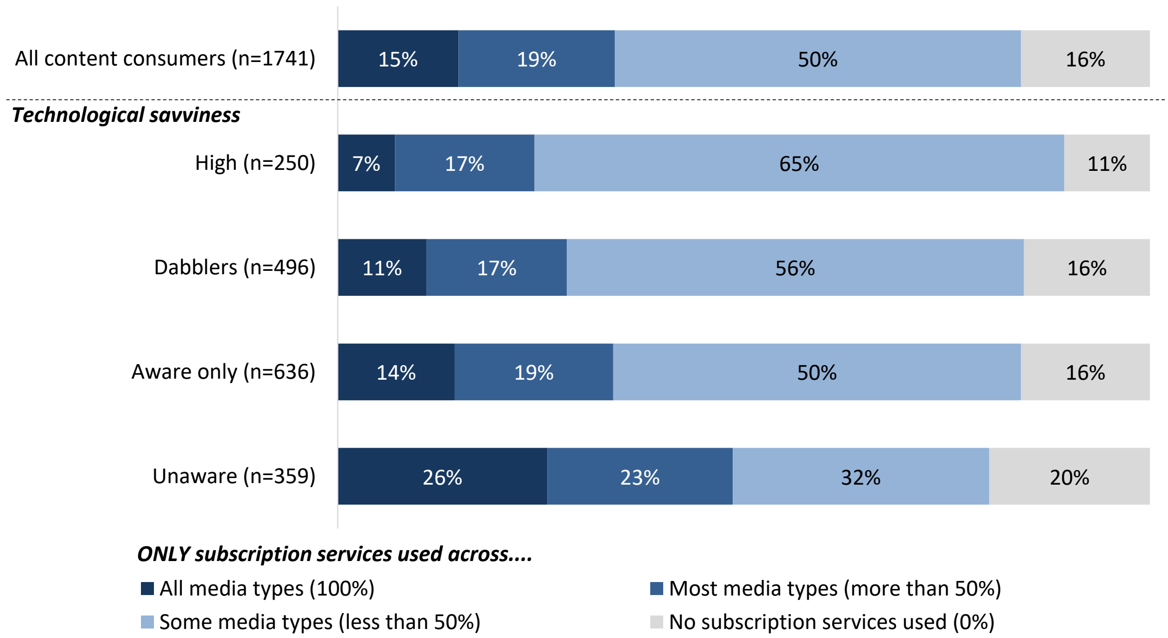
Q. In the past 5 years, have you made a conscious decision to reduce or stop accessing the following content types online in ways that you thought might be unlawful: [media type]?

In contrast, less savvy media consumers were more likely to:

- not consume media content online at all (see Figure 45);
- when they do access content online, do so less frequently (see Figure 46); and
- rely more heavily on subscription services to access that content (see Figure 49).

Figure 49: Use of ONLY subscription services across media types consumed, by technological savviness, 2021

Base: Respondents who consumed content online in the past 3 months (across any media type)



Q. Which sites or services have you used in the past three months to download, stream / access, or share [media type] through the internet?

Lawfulness of consumption and receiving assistance from others

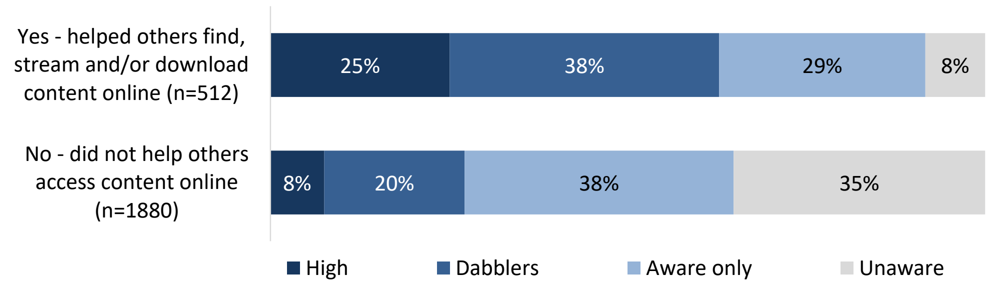
The research found some evidence to suggest that there is potential for unlawful consumption behaviours to be amplified by individuals who are highly savvy about technology. While these individuals represent only a small proportion of people (11%), it is possible that they may propagate unlawful consumption by helping others to access content in potentially unlawful ways, consumers who may not have done so without assistance.

People who helped others to find, stream and/or download content online were more likely to:

- be highly savvy about technology (see Figure 50);
- consume more content online in general (see Figure 51); and
- access content in ways that are probably unlawful (also shown in Figure 51).

Figure 50: Level of technological savviness, by helping others access content online, 2021

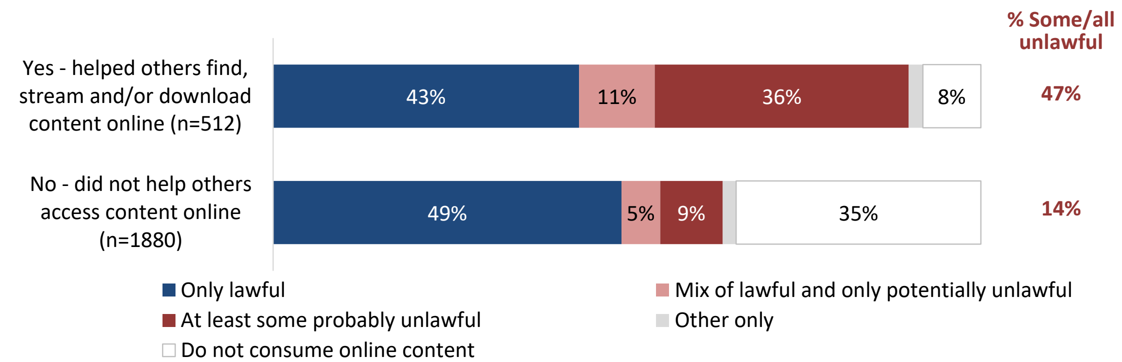
Base: All Respondents



q51. In the past 3 months, have you helped anyone else in the following ways? [search for / find content][download / stream content]

Figure 51: Graduated lawfulness of consumption, by helping others access content online, 2021

Base: All Respondents



Q. How is the way that you download/stream/access music/movies/TV/sport/online games typically split across the following? (Enter percentage of time for each [methods/source/option])

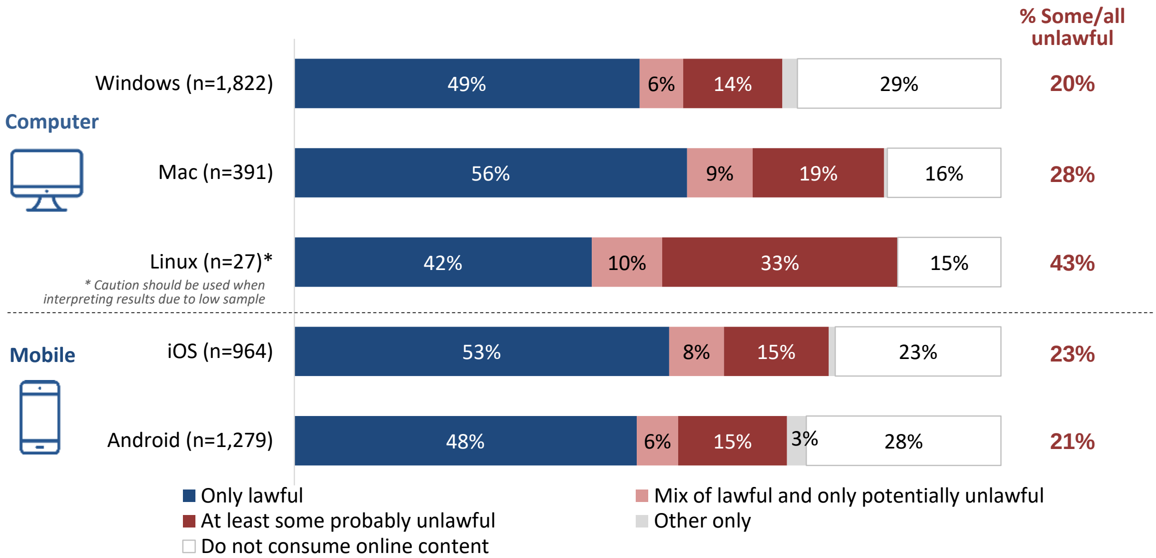
Lawfulness of consumption and technological ecosystems

Lawful consumption behaviours were similar across technological ecosystems / operating systems – both mobile and desktop. Based on the results of this research, there is limited evidence to suggest that a relationship exists between use of certain operating systems and unlawful consumption of media content online.

While Linux users were somewhat more likely to access content unlawfully compared to Windows and Mac users, this is unlikely to be associated with the choice of operating system. Instead, this is more likely to be related to levels of technological savviness, which were higher among Linux users. Further, results for Linux users should be interpreted with caution, as they are based on a relatively small number of responses (n=27).

Figure 52: Graduated lawfulness of online content consumption, by operating system, 2021

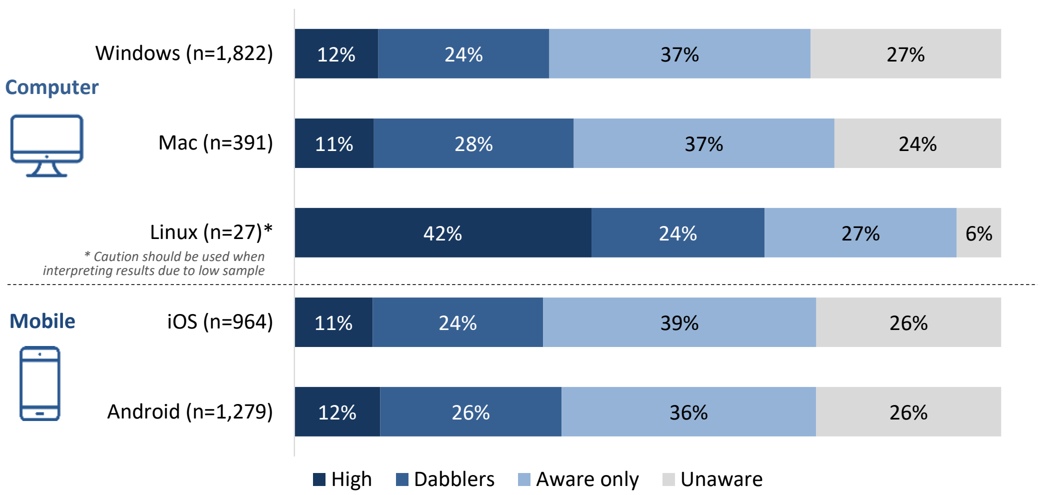
Base: Respondents who consumed content online in the past 3 months (across any media type)



Q. How is the way that you download/stream/access music/movies/TV/sport/online games typically split across the following? (Enter percentage of time for each [methods/source/option])

Figure 53: Level of technological savviness, by operating system, 2021

Base: Respondents who consumed content online in the past 3 months (across any media type)



Q52. How familiar are you with the following? [online technology, and ways to access content online]

XIII.Technical appendix

2021 Project development and changes.

Given that there were substantial changes to the survey in 2020, it was decided that there would be limited changes to the approach in 2021. While some revisions to the instrument were made, the 2021 survey instrument and methodology (including sample design) are largely consistent with 2020. While this allows for direct comparisons between the 2020 and 2021 results it is worth noting again the considerations when drawing comparisons to the pre-2020 results (as outlined below).

In 2020 a comprehensive questionnaire review process was undertaken by ORIMA Research and the Department project team to update the survey and ensure that it continued to be fit for purpose. Content for the 2020 survey was informed by both the 2019 survey, and of a UK equivalent as a comparative benchmark for contemporary use.[37] This process was undertaken with the view to maintain comparability in some cases to previous years, and in other cases to the UK survey. Throughout, the project team took the opportunity to significantly revise certain sections of the questionnaire for the sixth survey.

The 2020 questionnaire revision process also included consultation with nominated Departmental and sector representatives to inform the design and development of the questionnaire, and included:

- An initial workshop with internal staff; and
- A series of consultative stakeholder interviews with representatives from relevant industries.

Comparisons to pre-2020 results

Throughout this report most results have focused directly on comparisons between the 2020 and 2021 data – 2020 acting as a 'new' benchmarking for ongoing timeseries analysis. In this case the 2020 results were used as a new benchmark for ongoing comparisons.

Where comparisons are made to pre-2020 results, either within the text or the charts, the reader is advised to interpret these with consideration to the changes described above, and the environment at the time of survey fieldwork. These considerations are detailed below. To emphasise the 'break' in time series, many charts show a dotted line separating the 2020 and 2021 results from those that have come from previous surveys.

Data collection method and timing

Consistent with last year's data collection method, the data for the 2021 survey were collected through a purely online survey. Sampling was designed to mirror the national population to capture a representative sample.

In 2021 the survey ran from April 13-26, and asked respondents to consider their online activity over the previous three months (mid January – mid April approximately). The 2020 survey was conducted in June (measuring activity from approximately mid-March through to mid-June). This may impact the levels and types of activities undertaken online (i.e. due to weather, live sport seasons, etc.).

[37] Intellectual Property Office Online Copyright Infringement Tracker Survey.

COVID-19 Pandemic

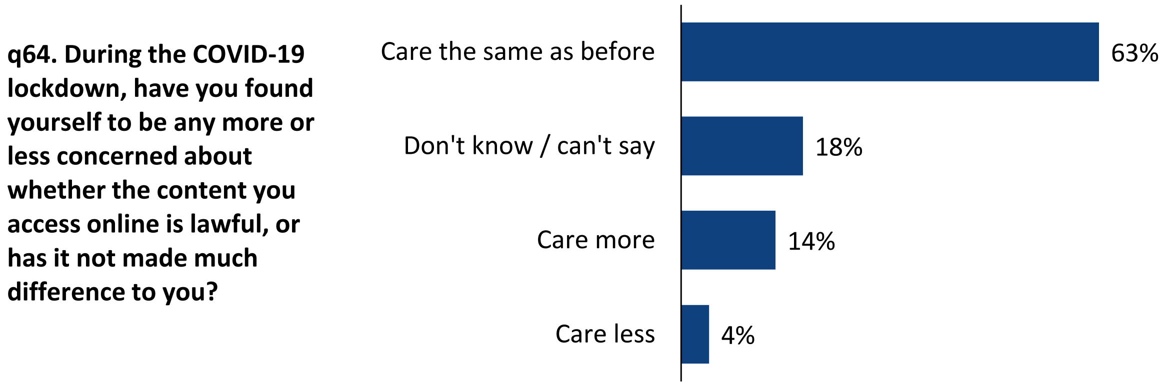
The 2020 survey was conducted during the COVID-19 pandemic, which resulted in much of Australia experiencing a period of 'lockdown' and/or social restrictions. For some, this may have included a period of self-isolation and/or changes in employment or household income; and for others this meant conducting most of their normal activities, including work, from home, whilst only going out occasionally for essential reasons. The timing of the pandemic meant that respondents in 2020 may have been in lockdown for at least some of the survey fieldwork period, but also potentially for some or all of the 3 months for which respondents were asked to reflect on their online activity.

This is likely to have had a substantial impact on online activity levels, and consumption of content, and hence potentially on infringement levels. The pandemic also resulted in the postponement or cancellation of many activities / events which may have had a flow on effect with the five key content types that are captured in the 2020 survey, including but not limited to the cancellation / postponement of live sport (including the 2020 AFL and NRL seasons), closure of cinemas and or postponement of new movie releases, postponement of new album releases, cancellation of live music or theatre, and more.

COVID-19 lockdown restrictions were largely absent during the conduct of the 2021 survey. To understand the potential impacts of the pandemic on individuals, the 2021 survey asked "compared to during the first few months of COVID-19 in 2020, would you say that you are more or less concerned now about whether the content you access online is lawful, or did it not make much difference to you?". Figure 40 suggests that the majority of respondents (63%) maintained the same level of concern about accessing content lawfully as before the COVID-19 pandemic. A total of 18% of respondents reported a change in their levels of concern for accessing content lawfully, with the majority (14%) reporting being more concerned than before the COVID-19 pandemic.

Figure 54: Lawfulness of online content access, 2021

Base: all respondents (n=2,392)



Other limitations

Self-report measures were used in this survey as a practical way of measuring online behaviours. It should be noted that self-report measurements do have limitations. When reporting on their own behaviours, respondents may be prone to social desirability effects and hence respond in a socially acceptable way. Privacy assurances and confidentiality of responses to this survey may have assisted in combatting this bias. It should also be noted that results in relation to the average proportion of time spent downloading / accessing by content type reflect the respondent's estimation of the average proportion of time that they spent using each source rather than number of hours. At the questionnaire design phase, it was recommended that asking respondents to estimate the number of hours they had spent downloading / streaming content in the past 3 months would be difficult for respondents to recall accurately or reliably.

Fieldwork

The survey was administered using an online self-completion methodology. The survey was programmed, hosted and sample sourced by iLink Research. The online survey underwent comprehensive internal testing by the ORIMA project team, as well as User Acceptance Testing by the Department project team, prior to the survey launch. As part of the questionnaire finalisation process, a pilot was conducted between April 13-14, to both assess the suitability of survey design and content and test the online system and survey length. A total of n=72 participants completed the pilot survey. Overall, the pilot was assessed as being successful as there were no substantial difficulties raised or improvement suggestions provided in relation to any aspect or question of the survey, and no critical survey issues were uncovered.

The main survey fieldwork was conducted between April 15-26, with the target audience being all internet users aged 12+ in Australia. Overall, a total of n=2,392 individuals participated, and the average survey length was 17 minutes. Of these:

- n=283 were aged 12 – 17 years of age; and
- n=2,109 were aged 18 and older.

Respondents under 18 years of age were recruited via their parents, who were asked to provide informed consent prior to passing the survey onto their child to participate.

Sample design and response rates

Consistent with 2020, the target audience for the 2021 survey was individuals aged 12+ in Australia who use the internet. Interlocking quotas were set by location (state), gender and age, and these were monitored throughout the fieldwork period to ensure a representative sample was collected. Table 20 outlines the target response numbers compared to final achieved figures.

Table 20: Target and achieved sample, 2021

Age	Target	Achieved
12-15 years	174	175
16-24 years	366	356
25-34 years	408	400
35-44 years	444	438
45–54 years	408	407
55-64 years	324	327
65 and older	276	289

The survey data was also weighted at the data processing stage to balance obtained samples against known population characteristics. This was done to ensure the results were maximally representative of the broader population.

Data was weighted to national proportions for location (state), gender and age based on the latest ABS statistics using a non-interlocking Random Iterative Method (RIM) weighting approach. This approach enables adjustments to be made for a number of different characteristics in the data set simultaneously, in a way that ultimately keeps the target characteristics proportionate as a whole, and most closely reflecting the broader population. It involves using statistical software to compute multiple, iterative combinations of weighting adjustments for each characteristic of interest in turn, to determine the adjustments that collectively result in a data set that most closely reflects target population benchmarks for all characteristics of interest.

Presentation of results

Results presented in the figures and tables throughout this report are all weighted results unless otherwise stated, whilst sample sizes are all unweighted.

Percentages in this report are based on the total number of valid responses made to the particular question being reported on. In most cases, results reflect those participants who expressed a view and for whom the questions were applicable. ‘Don’t know / can’t say’ and ‘prefer not to answer’ responses are included only where they aid in the interpretation of results. Results presented as percentages throughout the report may not add up to 100% (particularly where displayed in chart form) due to rounding, or where participants were able to select more than one response. In some cases where key results do not add up to 100% due to rounding, these have been manually revised (by rounding up or down to the nearest whole number in order to add to 100% to assist the reader).

Statistical precision

Table 21 provides indicative confidence intervals (at the 95% level of statistical confidence) for different response sizes within the surveys, allowing for the impact of weighting as outlined above.

Table 21: Indicative confidence intervals – 95% confidence level

Response size (n)	Statistical precision (percentage points)
2,400	+/- 2pp
1,800	+/- 2pp
1,500	+/- 3pp
1,000	+/- 3pp
500	+/- 4pp
250	+/- 6pp

Higher degrees of sampling error apply to questions answered by fewer respondents and to results for sub-groups of respondents. This is important because it impacts on the statistical significance of observed differences. In general terms, the smaller the sample size, the larger the difference needs to be in order to be statistically significant (i.e. to enable us to conclude that the observation is likely to be a real difference and not just due to natural variation in the sample).