CHOICE Digital Consumers – paying for content behaviour & attitudes
November 2014

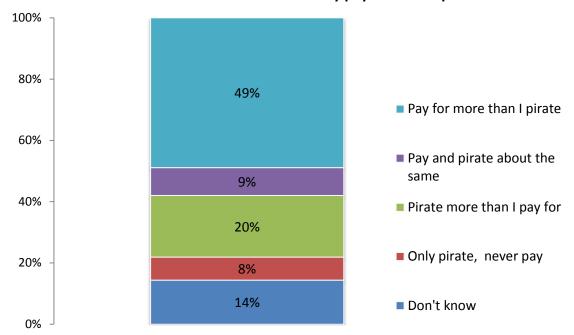## Australians are paying for content more often than pirating it

Frequency of purchasing and pirate activity

■ At least monthly ■ A few times a year ■ Never | Ever

Activity	At least monthly	A few times a year	Never	Ever
Go to the cinema	34%	53%	14%	87%
Buy / rent movies or TV shows	37%	31%	33%	68%
Watch pirated movie or TV show	25%	19%	57%	44%
Download / stream pirated movie or TV show	23%	11%	67%	34%
Download / stream pirated music	16%	13%	72%	29%

How often do you do the following?
Base: All people n=1046

Most people who pirate also pay for content

Pirates: Amount of content they pay for versus pirate

Legend:
- Pay for more than I pirate
- Pay and pirate about the same
- Pirate more than I pay for
- Only pirate, never pay
- Don't know

Bar segments (top to bottom):
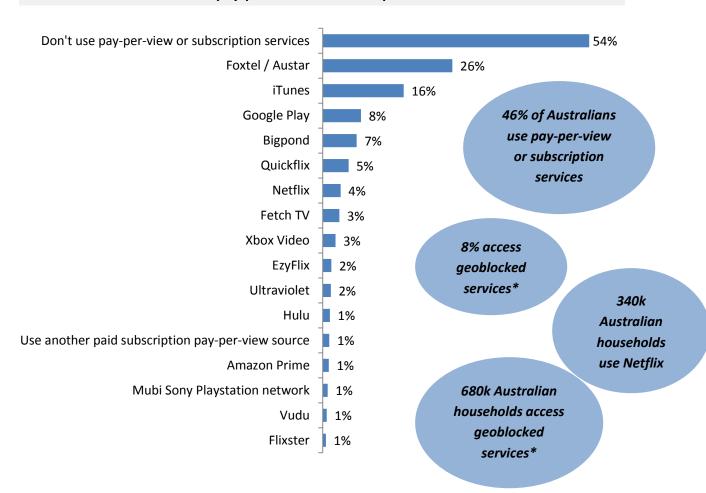- 49%
- 9%
- 20%
- 8%
- 14%

How much of the TV shows and movies that you watch would you say are pirated versus paid for?
Paid includes anything you rent or buy such as box sets, pay per view, subscriptions. Exclude what you watch on Free to Air TV.
Base: People who ever pirate or watch pirated movie/TV show/music n= 488

Almost half of Australians use a pay-per-view or subscription service

Use of pay-per-view and subscription services

Service	Percentage
Don't use pay-per-view or subscription services	54%
Foxtel / Austar	26%
iTunes	16%
Google Play	8%
Bigpond	7%
Quickflix	5%
Netflix	4%
Fetch TV	3%
Xbox Video	3%
EzyFlix	2%
Ultraviolet	2%
Hulu	1%
Use another paid subscription pay-per-view source	1%
Amazon Prime	1%
Mubi Sony Playstation network	1%
Vudu	1%
Flixster	1%

46% of Australians use pay-per-view or subscription services

8% access geoblocked services*

340k Australian households use Netflix

680k Australian households access geoblocked services*

Which of the following sources do you pay to subscribe to, or use on a pay-per-view basis, to access or watch movies or TV shows?
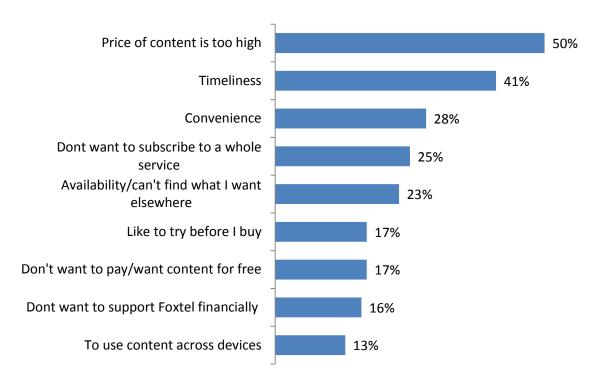Base: All people n=1046
% add to more than 100%, as people could select more than one service
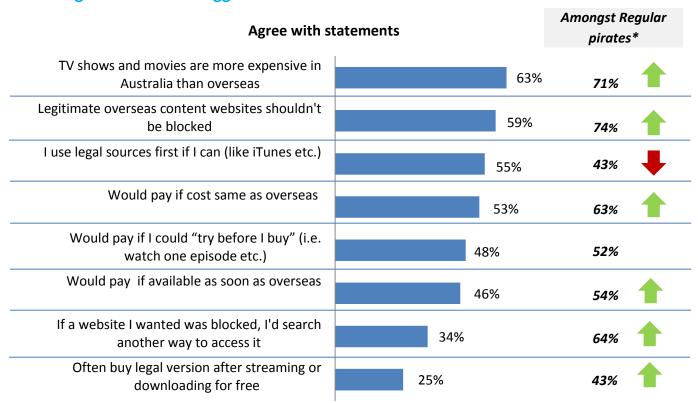*Geoblocked services: Hulu, Netflix, Vudu or iTunes or GooglePlay overseas store

The main reason people say they pirate is related to price and timeliness of content

Reasons for pirating content

Reason	Percentage
Price of content is too high	50%
Timeliness	41%
Convenience	28%
Dont want to subscribe to a whole service	25%
Availability/can't find what I want elsewhere	23%
Like to try before I buy	17%
Don't want to pay/want content for free	17%
Dont want to support Foxtel financially	16%
To use content across devices	13%

Which of the following are reasons you download, access or watch pirated movies or TV shows?
Base: People who ever pirate or watch pirated movie/TV show/music n= 488
% add to more than 100%, as people could select more than one reason

Pirating attitudes and triggers

Agree with statements		Amongst Regular pirates*
TV shows and movies are more expensive in Australia than overseas	63%	71% ⬆
Legitimate overseas content websites shouldn't be blocked	59%	74% ⬆
I use legal sources first if I can (like iTunes etc.)	55%	43% ⬇
Would pay if cost same as overseas	53%	63% ⬆
Would pay if I could "try before I buy" (i.e. watch one episode etc.)	48%	52%
Would pay if available as soon as overseas	46%	54% ⬆
If a website I wanted was blocked, I'd search another way to access it	34%	64% ⬆
Often buy legal version after streaming or downloading for free	25%	43% ⬆

How much do you agree or disagree with the following statements?
% who strongly/slightly agree
Base: All people n=1046
*Regular pirates: Download TV shows or movies at least monthly n=243
Red/green arrows indicates significant differences versus all people at 95% confidence interval

Who are the pirates?

- Regular pirates are more likely to be male: 59% of people who pirate at least monthly are men and 41% are women.
- Regular pirates are also more likely to be younger: 14% of men aged 18-24 pirate at least monthly compared to 5% of men aged 50-65. 10% of women aged 18-24 pirate at least monthly compared to just 3% of women aged 40 plus.
- People who pirate at least monthly are more likely to pay for content through an iTunes or Apple TV subscription. 29% of people who pirate also pay for content through iTunes compared to 16% of the general population and 12% of people who never pirate.
- Pirates are also more likely to have a Quickflix account. 11% of people who pirate at least monthly have a Quickflix account compared to 5% of the general population and 3% of people who never pirate.
- 55% of people who regularly pirate own their own home.
- Regular pirates are significantly more likely to go to the movies or cinema. 36% of the general population go to the movies at least monthly, 56% of people who regularly pirate go to the movies at least monthly.

Who never pirates?

- 53% of people who never pirate are women, 47% are men.
- They are most likely to be aged between 35-65yrs.
- Only 12% of people who never pirate have an iTunes or Apple TV subscription compared to 16% of the population.
- People who never pirate are more likely to have no subscription services at all. 46% of people who never pirate have no subscriptions compared to 41% of the general population.
- People who never pirate are less likely to go to the cinema than the general population. 26% of people who never pirate go to the cinema at least monthly compared to 33% of the general population and 56% of people who regularly pirate content.

Notes about the research:

Research was conducted with 1,046 participants.
Respondents were Australians aged 18-65.
Final data was weighted to ensure it is representative of the Australian population ABS Census 2011.
Fieldwork was conducted between 31st October and 7th November, 2014.
The survey was designed by CHOICE. Fieldwork was administered by iView.
Due to the sensitive nature of the survey (asking about illegal activity) participants were assured confidentiality to encourage honest responses.
Australian household estimates have been calculated using ABS 2011 households data
https://aifs.gov.au/institute/info/charts/households/index.html
We have assumed each respondent represents one household only, and together our sample represents all Australian households