Consumer Survey on Online Copyright Infringement 2022

Survey Findings Report

Commissioned by the Australian Attorney-General's Department

ORIMA

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This project was conducted in accordance with the international quality standard ISO 20252, the international information security standard ISO 27001, as well as the Australian Privacy Principles contained in the Privacy Act 1988 (Cth). ORIMA Research also adheres to the Privacy (Market and Social Research) Code 2021 administered by the Australian Data and Insights Association (ADIA).

ORIMA pays respect to Aboriginal and Torres Strait Islander Peoples past and present, their cultures and traditions and acknowledges their continuing connection to land, sea and community.

We would also like to acknowledge and thank all the participants who were involved in our research for their valuable contribution.

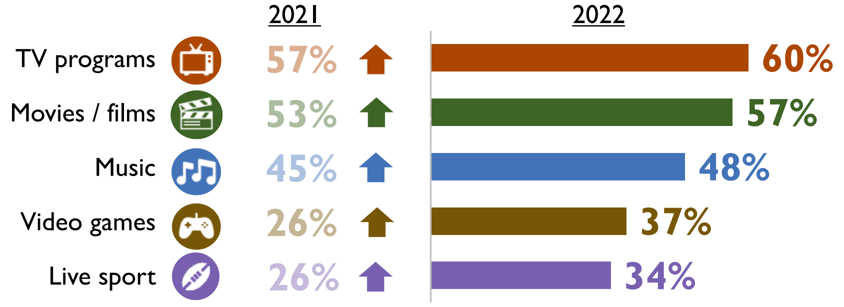
I. Executive summary

The **2022 Consumer Copyright Infringement Survey** was conducted online from 24 June to 14 July, and sought responses from Australian internet users (aged 12+) regarding their online content consumption over the past 3 months. A total of n=2,400 individuals participated in the research.

Overall consumption of content online

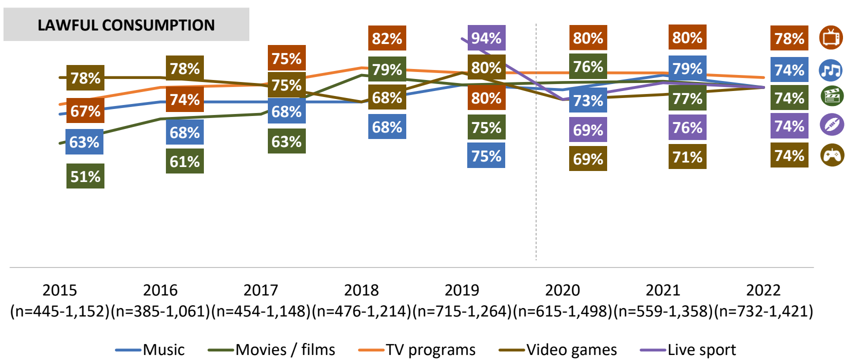
72% of respondents had **consumed** music, movies / films, TV programs, video games and/or live sport online in the past 3 months (i.e. downloaded / streamed / shared)

Overall consumption increased for all content areas since 2021



Lawful consumption of content online

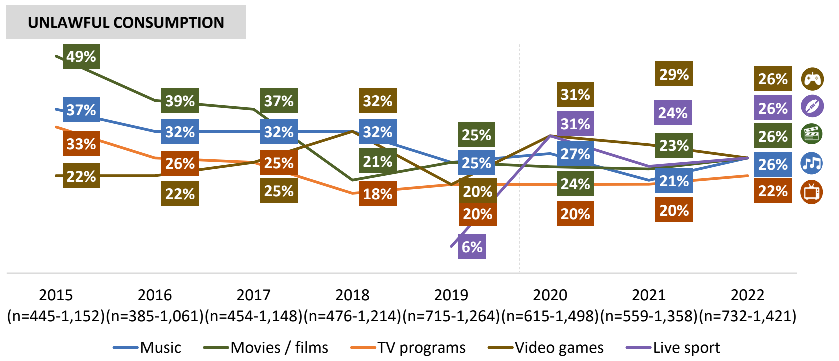
74%-78% of those who had downloaded or streamed / accessed each individual content type online in the past 3 months had only consumed content online in ways that were likely to be **lawful***



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

Unlawful consumption of content online

22%-26% of those who had downloaded or streamed / accessed each individual content type online in the past 3 months had consumed at least some content online in ways that were likely to be **unlawful***



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

Of those who had streamed / accessed or downloaded any content in the past three months across <u>any content type</u> (music, movies / films, TV programs, video games and/or live sport):

61% had only consumed content online in ways that were likely to be **lawful*** across all content categories they reported consuming

39% had consumed content online in at least one content category in ways that were likely to be **unlawful***.

* Caution should be used when comparing 2020-22 results to previous years due to methodology changes (indicated by vertical dotted line in charts). 2022 results should also be considered in the context of further methodological changes expected to increase the survey's sensitivity to emerging unlawful consumption methods and therefore increase the apparent rate of unlawful consumption—see page 5 for discussion.

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

42% of those who had **downloaded** content in the past 3 months did so at least some ways that were likely to be unlawful (in line with 43% in 2021); while

33% of those who **streamed / accessed** content in the past 3 months did so in at least some ways that were likely to be unlawful (substantially higher than 24% in 2021, partially due to the 2022 survey's increased sensitivity to emerging unlawful consumption methods).

Confidence

32% 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 higher than 29% of all respondents in 2021).

Concern

35% of respondents would be **very concerned** if they accessed at least one type of online content unlawfully (down from 38% in 2021). When asked why:

- **64%** reported that they **didn't think it was right** (versus 68% in 2021).
- **56%** were concerned that **files may have viruses / malware / spyware** (versus 58% in 2021).
- **47%** Wanted to **support creators / industry** (versus 45% in 2021).
- **44%** Were concerned about getting **caught / punished** (versus 41% in 2021).

Blocked websites

17% of respondents had **encountered** a blocked website in the past 3 months (up from 11% in 2021). Of these, upon encountering a blocked website:

- **60%** reported that they **simply gave up** (consistent with 59% in 2021).
- **16%** **bypassed** the blocked website (consistent with 13% in 2021).
- **14%** Sought alternative lawful access (consistent with 18% in 2021).
- **6%** Sought alternative free but unlawful access (consistent with 5% in 2021).

Of those who had **bypassed** the blocked website, the top three ways were to:

- **46%** use a VPN (versus 61% in 2021)
- **24%** use a proxy website (versus 21% in 2021)
- **18%** use a search engine to find an alternative site (versus 25% in 2021)

VPN

62% of respondents were **aware** of what a VPN service was (up from 59% in 2021).

25% of respondents had **used** a VPN service (broadly in line with 21% in 2021). Infringers were more likely to have used VPN services (**39%** vs 24% of non-infringers).

Custom DNS

23% of respondents were **aware** of what a custom DNS was (unchanged from 2021).

6% of respondents had **used** a custom DNS (broadly in line with 4% in 2021). Infringers were more likely to have used a custom DNS (**13%** vs 5% of non-infringers).

Password sharing

26% of all respondents **allowed someone outside of their household to use their login details** to access subscription services for at least one content type.

11% of all respondents **paid a small fee to access one or many subscription services through a shared / unknown account** for at least one content type.

II. Introduction and survey changes in 2022

Since 2015, the Australian Government[1] has commissioned annual surveys of Internet users' activities across several core content types: music, video games, movies and TV programs. Live sport was added from 2019.

In 2020, the survey methodology and questions were substantially updated to reflect contemporary methods of content delivery and consumption. The 2020 survey content and process were closely replicated in 2021.

In the current survey (2022), minimal changes were made to the questionnaire structure, to maximise trackability with the 2020 and 2021 results. However, there was an increasing number of methods and individual channels for consuming content that needed to be included in the survey to obtain a comprehensive picture of consumer behaviour. As such, substantial changes were made to the way respondents were asked to indicate which channels they use to consume different types of online content.

In previous surveys, respondents selected from a list of brands, channels, or platforms they had used, then separately broke down their proportional consumption across broad categories or methods of consumption. As content area brand lists are now too long to be practical in some areas, a three-step integrated approach was implemented in 2022. Respondents first selected the methods they had used, then were shown a series of shorter relevant brand lists for just those methods, and were then asked to allocate their proportional use against only those methods they indicated using.

While this change may impact on perfect comparability with previous years' data, the new method will result in more internally consistent data and should create more reliable and accurate estimates than in previous years. This approach is also more readily able to be updated in future years.

Key considerations for comparing results to earlier years are outlined on pages 5-6.

In 2022, prevalence of online copyright infringement was again 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: Reported subgroups

Overall	Music	Movies / Film	Television	Video games	Live Sport
(pg.8)	(pg.24)	(pg. 41)	(pg. 58)	(pg. 76)	(pg. 88)

Within each of the content areas in the survey, respondents were shown a list of applicable methods of consumption and relevant examples. Due to the length of some of these, the report does not always show the full description and example for each method. For full descriptions see the questionnaire.

[1] Now the Attorney-General's Department, formerly the Department of Infrastructure, Transport, Regional Development and Communications, and the Department of Communications and the Arts.

Research objectives

Since its inception in 2015, the key purpose of the research has been to understand the prevalence of online copyright infringement in Australia and how this has changed over time. The 2022 research was undertaken with the view to address secondary objectives, including:

- to understand the prevalence of online copyright infringement in Australia across five main content types (music, video games, movies, TV programmes and live sport), and to potentially obtain top level measurements provided for further content types[2]
- 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, if any, of new and emerging unlawful means of accessing content
- to measure the uptake of subscription streaming services and any impact on infringement rates
- to understand the impact of the Government's website blocking measures.

[2] For reasons of survey length these secondary content types were not included in 2020 and 2021. In 2022, e-books and podcasts were included in the overall consumption measures.

Reading and interpreting the 2022 results

To reflect contemporary circumstances, the survey was significantly modified in 2020. The update involved consultation within the department, and with key representatives across the Australian music, film, television (including live sport) and video game industries. This was closely mirrored in the 2021 survey to allow for confident comparisons with the 2020 results.

In 2022, while the data collection process and basic questionnaire flow and structure remained unchanged from 2020 and 2021 to maximise compatibility with previous survey data, some changes were made in the method of collecting and calculating emerging methods of potentially unlawful consumption. These changes increase the sensitivity of the survey to such emerging methods.

Due to increasing market fragmentation, brand lists for some content types became too large to be practically shown to respondents as a single list. This necessitated changes in how respondents report their consumption methods in 2022. Respondents were now asked to identify what methods they used to consume each type of media and were then shown only the brands that are relevant to that method. They then allocated the proportion of time that they spent across only the methods they had used. This new method is consistent across content types covered by the survey and will naturally result in more internally consistent data from respondents (as they are only shown options for later questions that they have already said they use).

This process is more intuitive and relevant for respondents and has also allowed for some refinements to the list of methods of consumption listed to keep up-to-date with lawful and unlawful methods that are being used. In particular, a new category of "paying a small fee to access subscription services through a shared / unknown account" was added across all content areas (rather than just video games, where it was previously included), and which was classified as *probably unlawful*. Overall, it was expected that increasing the sensitivity of the survey to emerging unlawful consumption methods would likely have the effect of increasing the apparent rate of unlawful consumption, a key indicator from the survey. While this methodological change appears to have had an impact on the 2022 survey's findings, no further detail on the specific behaviours that led respondents to indicate that they had paid a small fee to access one or more subscription services through a shared / unknown account can be obtained from the survey data.

Another small but meaningful change to the survey in 2022 was where respondents were asked to think about YouTube. Previously YouTube was classified as a form of social media. In 2022, YouTube was moved into a category of either a paid for subscription service or the free version of a streaming service that has a paid level available. This more accurately reflects how YouTube is now perceived and leaves the social media category to be focussed on what is more widely thought of in this category. This was expected to have the effect of reducing the apparent use of social media but focussing it more precisely.

While these changes do not affect the way the data is reported, they have necessarily resulted in some discontinuity with this data from previous years. It is considered that the increase in quality and validity of the data from the changes justifies the impact on data continuity.

Readers should be mindful of these changes when considering data about apparent changes in the proportion of lawful or unlawful consumption between 2022 and the previous two surveys, and to particular consumption methods. The report seeks to note these points where relevant.

In addition, readers should exercise caution in interpreting the 2020-22 results compared to the 2015–19 data series. Further detail is also provided in the Technical Appendix, but broadly:

- The way lawfulness of consumption was estimated was fundamentally changed from 2020 onwards, with methods of consuming content pre-classified as likely to be lawful or likely to be unlawful, rather than asking respondents to self-report their proportion of unlawful consumption.

- In 2020, the data collection moved to an entirely online methodology, rather than including a proportion of telephone interviews with non and low-volume internet users – reflecting the ubiquity of internet usage and focussing the survey on the key audience of online content consumers.
- Data collection has varied somewhat in terms of time of the year. Most surveys have asked respondents to reflect on the January-March period of the year, but 2020 and 2022 both asked respondents to mostly focus on April-June (as being the three months before the survey was conducted). It is possible that the exact timing of the data collection may impact some consumption patterns, especially related to live sport.
- The 2020-21-22 surveys have all been conducted in the context of COVID. It is not clear to what extent apparent changes in consumption patterns and behaviours may be temporary or permanent, but these effects need to be considered when looking at changes in results from year-to-year during this period.
- Since 2020 the survey has no longer asked respondents about ownership of physical copies of content.

Part 1: Overall Consumption

III. Observations

The annual consumer survey on online copyright infringement collects a substantial amount of data about consumer behaviours, knowledge, and attitudes. While a complex subject area for respondents to recall and accurately report on their exact behaviours, the survey provides a highly valuable overview of lawful and unlawful online consumption in Australia across key content types.

For the purposes of the survey, lawfulness is now estimated by asking respondents about their use of a wide range of relevant methods to consume online content across different content types. Each method is pre-classified as being likely to be lawful, or likely to be unlawful (recognising that the lawfulness of a method may vary by content type). At its most basic level, '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. A more nuanced 'graduated classification' is also undertaken to support the wider interpretation of the survey (see section XII).

Continuous improvements to the survey, and understanding trends

The nature of online content and online consumption is continuously changing, meaning that the survey also needs to be continuously updated. Care therefore needs to be taken in interpreting year-to-year variations in results – especially across years where substantive changes are made.

The biggest change was in 2020, when the fundamental method of assessing lawfulness changed from self-report to pre-classification of the likely lawfulness of various consumption methods used. In the 2022 survey, the methods of consumption included for all content types were again expanded and made more consistent, including adding additional methods that are classified as likely to be unlawful (especially related to paid credential sharing[3]). This was expected to increase the sensitivity of the survey to some forms of unlawful consumption. Readers should be aware of this change when interpreting the 2022 results, as the apparent increase in unlawful consumption likely includes at least a component of better detection of unlawful consumption, as well as year-on-year changes.

The 2015-2019 data was collected using a consistent methodology, and can be considered comparatively. The 2020-2021 results were from near identical surveys and methodologies, and can be confidently compared. The trends and changes seen in the 2022 data need to be interpreted more carefully, until more directly comparable data can again be added from a 2023 survey.

[3] Defined in the questionnaire as "Paying a small fee to access one or many subscription services through a shared / unknown account (e.g. shared login credentials)".

Consumption patterns

- While there are variations reported year-on-year, and some trends and changes apparent in consumption patterns, overall, there is considerable consistency in what has been reported by respondents over the past three years since the survey was substantially updated in 2020.
- A substantial proportion of the Australian community continue to report consuming at least some online content in the last three months. 72% reported consuming at least one of music, movies / films, tv programs, video games or live sport online in the three months prior to the survey (April-June 2022). This was similar to 71% in 2021 and 75% in 2020.
- 39% of respondents who had consumed online content in the 2022 survey had done so in at least one way likely to be unlawful ('infringers'), up from 30% in 2021 and 34% in 2020. 4% were classified as infringers only because they had used the newly included paid credential sharing consumption method.
- Streaming is the dominant method of consuming content across all major content types. Of the respondents who consume online content, almost all consume at least some by streaming – 70% of all respondents in 2022 (compared to 68% in 2021 and 71% in 2020). 33% reported downloading any content in the last three months, similar to the 32% reported in 2020, but higher than the 25% reported in 2021 (mostly reflecting a higher proportion of video game consumers reporting at least some downloading). In 2022, a higher proportion of streaming was classified as likely to be unlawful (see below).
- In 2022, respondents reported accessing online content in the same or slightly fewer ways – but reported accessing online content across a somewhat wider range of content types. Lawfulness of consumption for each content type did not vary greatly in 2022, but through the increased breadth of content areas respondents reported consuming, somewhat more of them did at least something that was classified as likely to be unlawful.
- Since 2020, the survey has included an expanded section on attitudes and motivators for consumers. These results have provided considerable information about the level of knowledge / uncertainty about lawful consumption amongst consumers, and their levels of concern. These results have shown clear patterns in the community, and variations between infringers and non-infringers. After three years of tracking these results, the patterns indicate that knowledge and attitudes are reasonably stable, suggesting any changes are likely to be incremental rather than seen in significant annual fluctuations or changes. Noteworthy patterns seen in 2022 include:
    - If anything, the confidence of respondents to identify what is lawful or unlawful content may be declining very slightly over the past three years.
    - Concern about accessing unlawful content is lower in 2022.
    - There remains considerable ambiguity about the likelihood for online consumption activities to be lawful; and younger respondents are the most likely to think that all types of consumption activities are likely to be lawful.

Factors associated with lawfulness of consumption

- Downloading remains more likely than streaming to be unlawful. However, in 2022 a higher proportion of reported streaming was classified as likely to be unlawful – and this was only partially due to the inclusion of new ways of consuming content that were classified as unlawful. 33% of streaming was considered unlawful in 2022, up from 24% in the past two surveys. 42% of downloading was considered unlawful (compared to 43% in 2021 and 49% in 2020).
- In previous years, it was noted that a move towards streaming was likely to be related to a decline in unlawful consumption – but this increase in unlawful streaming in part accounts for the overall increase in unlawful consumption reported in 2022. To some extent, this is due to the increased sensitivity of the survey to unlawful credential sharing, but is also related to other changes in methods of streaming – such as apparent reductions in the use of pay-per-view and official free scheduled broadcasts.
- Most people, infringers included, generally don't use only unlawful consumption methods. Within content types, no more than 12% of all respondents use only unlawful methods to access content (and just 3% of all respondents use only unlawful consumption methods across all content types they consume). Between 34%-47% of the time infringers spend accessing different types of content is classified as probably lawful (lowest for live sport and video games). Compared to non-infringers, infringers are more likely to be male, younger and have higher household incomes – but infringement occurs across all demographics.
- Infringers tend to access online content in more ways than non-infringers – with their status as infringers stemming from the fact that some of these are likely to be unlawful. Infringers are more familiar with many technical terms and technologies. While many respondents report valid and lawful reasons for their use, infringers are more likely than non-infringers to have used a virtual private network (VPN) (39% compared to 24%) or a custom domain name system (DNS) service (13% compared to 5%).

IV. Overall consumption

This chapter presents the findings in relation to overall consumption of content online in 2022. Detailed analysis for each of the five content types is presented in Part 2, and an exploration of attitudinal results and motivators for consumption behaviours in section XI. As noted earlier, comparison between 2020-22 results and 2015-19 results should be made with caution.

See page 5 for information about important modifications to the survey methodology. These changes may impact lawful and unlawful consumption results in this section. The changes were made to make the survey more sensitive overall to some emerging methods of unlawful consumption.

Overall consumption behaviours

72% 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), in line with 71% last year.

70% had **streamed** content from any of these categories online in the past 3 months, in line with levels reported in previous years (68% in 2021, and 71% in 2020).

33% had **downloaded** content from any of these categories online in the past 3 months, returning to 2020 levels (32%) after a considerable drop in 2021 (25%).

14% had **shared** content from any of these categories online in the past 3 months, also reflecting levels last reported in 2020 (14%), after dropping slightly to 11% last year.

Consumption behaviours by content type

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

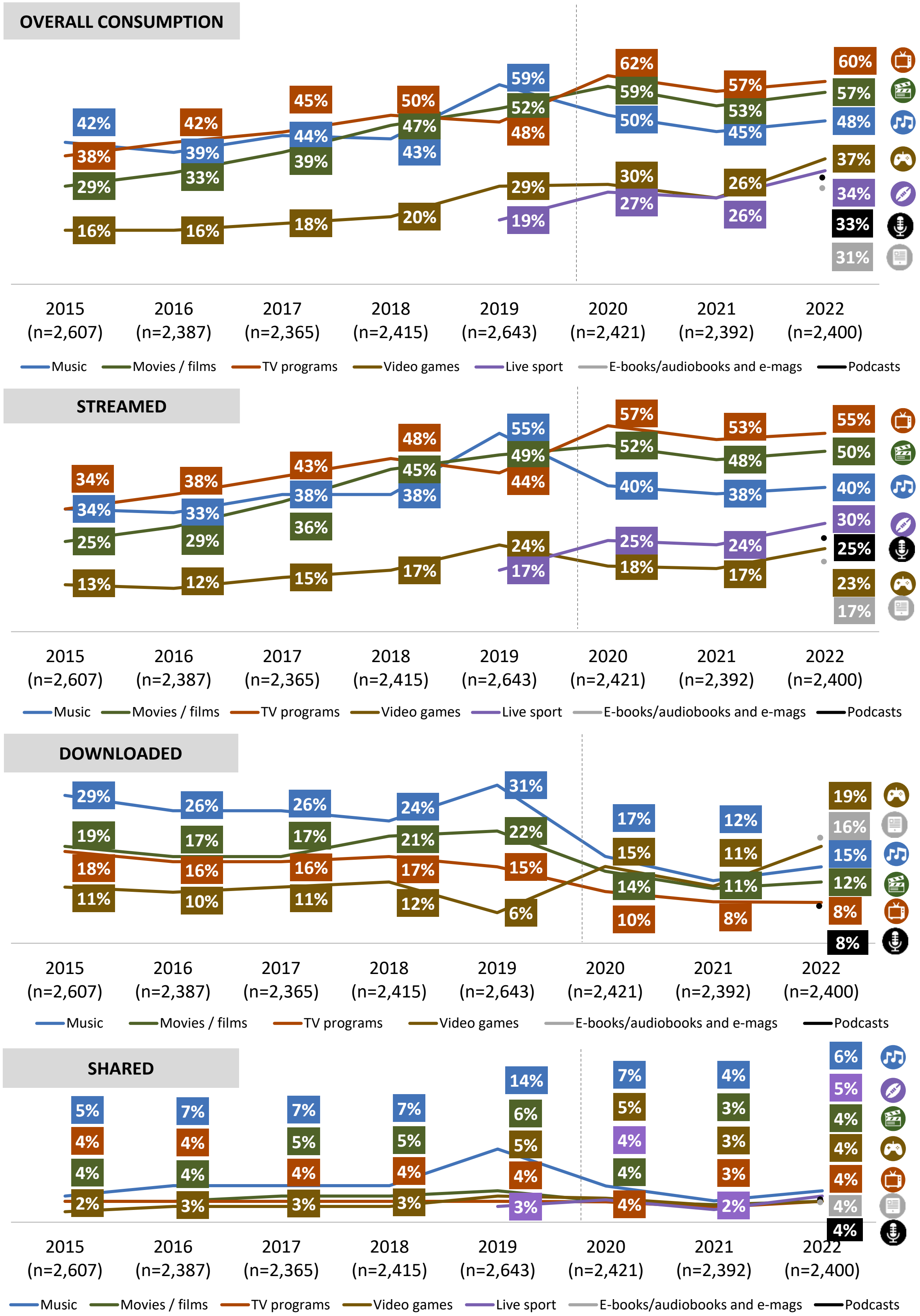
- As in 2020 and 2021, TV programs were most likely to have been consumed online in the past 3 months (60%), ahead of movies / films (57%) and music (48%). Each of these figures was 3-4% higher than in 2021, and 2% lower than in 2020.[4]
- The proportion reporting engaging with video games (37%) and live sport (34%) online in the past 3 months were both higher than in 2020 or 2021.
- Similar proportions reported engaging with podcasts (33%) and e-books (31%) online in the past 3 months, which were both measured for the first time in 2022.

When looking at specific consumption behaviours (streaming, downloading and sharing), in contrast to 2021 when all activity levels either declined or remained broadly similar across all content types, in 2022, most reported activity levels are slightly up in the last 12 months, most notably for video games (which are in 2022 for the first time the most downloaded type of content).

[4] The 2020 and 2022 surveys were conducted at a somewhat different time of the year, asking respondents to report the April-June period rather than the January-March period as in the 2021 and the 2015-19 surveys. It is possible that seasonality may have some impact on reported consumption patterns. For example, the 2020 and 2022 surveys are run away from the summer months when people are potentially slightly more likely to spend time outside and away from their screens; and engagement with live sport may be somewhat different at different times of the year. The variations in consumption observed over the years are small and within margin of error, but it is possible that the survey timing does have some impact on reported consumption.

Figure 1: Proportion of respondents who consumed each content type (either lawfully or unlawfully) 2015–2022

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 2020-22 results to results from previous years. Podcasts and e-books were added in 2022.

Frequency of consumption by content type

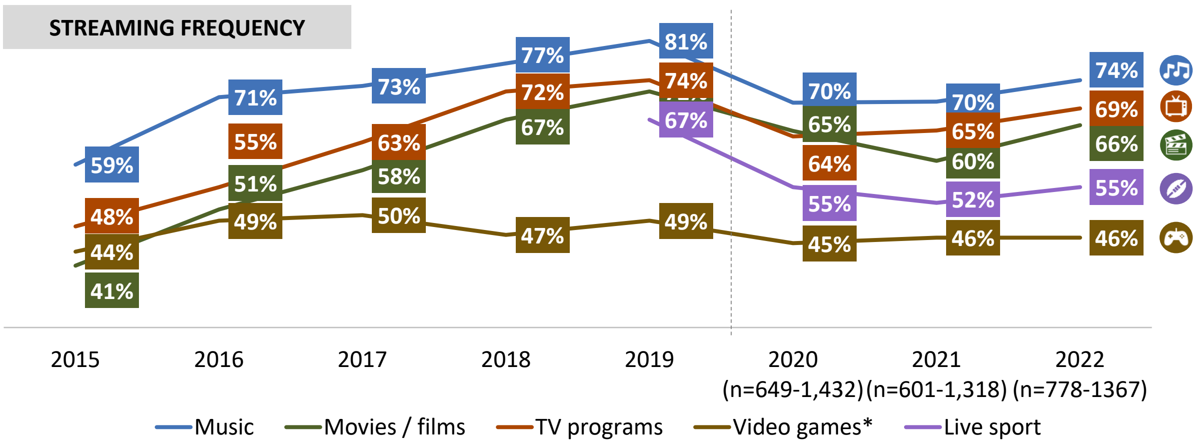
In general, frequency of online media consumption has been mostly stable over the past 3 years, with 36% of all respondents streaming / downloading / accessing at least one type of media content online weekly or more often (broadly in line with 34% last year, and 35% in 2020). This also represents 50% of respondents who accessed media content online in the past 3 months (in line with 49% last year, and 48% in 2020).

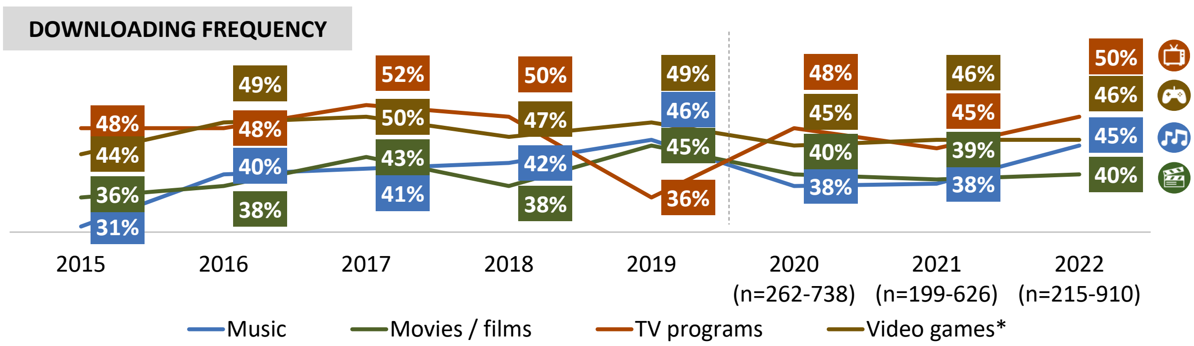
Figure 2 below shows the frequency with which those who reported streaming or downloading content types indicated that they did so.

- The relative levels of streaming different types of content have remained reasonably stable over 2020-22, with music streamed most frequently in the past 3 months (74% at least weekly, either lawfully or unlawfully), ahead of TV (69%) and movies / films (66%). Reported streaming frequency across all content types was either steady or up in 2021, and at a level greater or equal to 2020.
- TV programs were the content area downloaded most frequently in 2022 (50% at least weekly, either lawfully or unlawfully), closely followed by video games (46%). Reported downloading frequency for TV programs and for music were both up by 5-7% from 2021.

Figure 2: Frequency of consumption, by content type (% at least weekly, either lawfully or unlawfully) 2015–2022

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





* In 2020–22, 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 is not asked. Vertical dotted line indicates changes in survey methodology. Caution should be used when comparing 2020-22 results to results from previous years. Specific usage behaviours were not asked about in relation to podcasts and e-books.

Lawfulness of consumption

Unlawful behaviour is determined by asking respondents to indicate which sources they had used in the past 3 months to download or stream / access content online. The various sources of downloading / accessing content online were pre-classified as either 'probably lawful' or 'probably 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 their relevant classification, are presented in more detail in the remainder of this report.

> See page 5 for information about important modifications to the survey methodology. These changes may have impacted on the proportion of all respondents who reported at least some unlawful consumption by making the survey more sensitive overall to some emerging methods of unlawful consumption.
>
> See also Chapter XII (Additional Topics and Exploration) for more exploration of unlawful consumption.

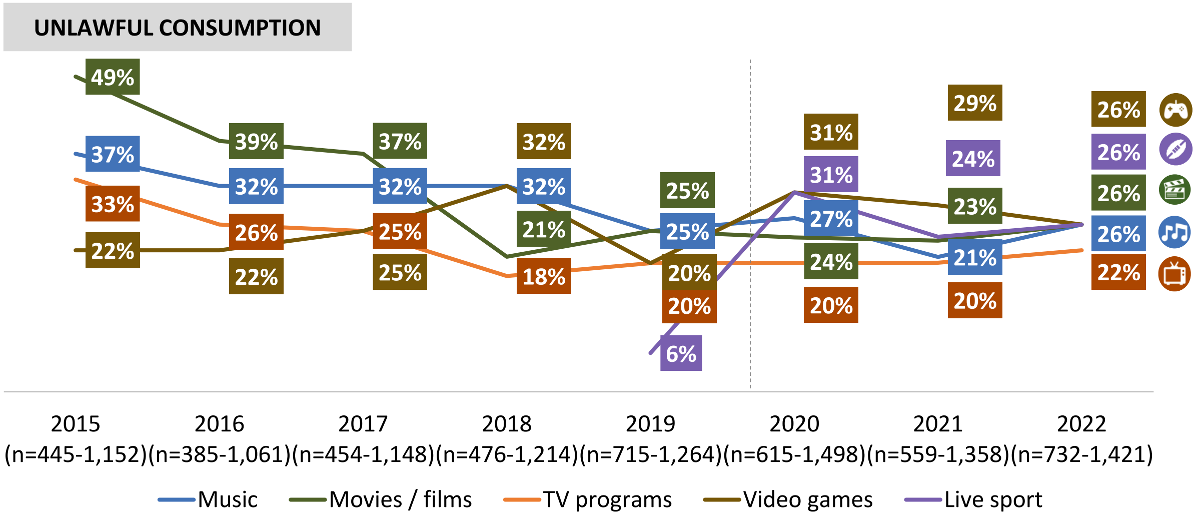
39% of those who downloaded or streamed / accessed content online in the past 3 months had consumed at least some content online in ways that were likely to be unlawful (across the five content types), up from a low of 30% last year, and 34% reported in 2020. 3% of respondents had consumed content only unlawfully, up from 1% in both 2021 and 2022.

> See also Chapter XII (Additional Topics and Exploration) for more exploration of unlawful consumption, and in particular the impact of some of the new consumption methods included in the 2022 survey – which had the expected effect of increasing the proportion of respondents who reported at least some unlawful consumption.

Unlawful consumption by content type has remained broadly consistent in each of the last three years, with between 20% and 31% of respondents who had consumed each content type online in the past three months reporting use of at least one likely unlawful source in each year. In 2022, these figures narrowed to between 22%-26% for each content type, compared to ranges of 20%-29% in 2021 and 20%-31% in 2020. While the proportions for individual content types have fluctuated somewhat, there was less variation between content types in 2022 compared to the two previous surveys. The fact that the total proportion who had consumed some content unlawfully increased while each individual content area did so only marginally (with the exception of video games where unlawful consumption declined) stems from respondents reporting any consumption across more content areas (see also later sections of this chapter, including page 19). The pattern suggests that as individuals consume content across more and different types, there is an increased chance of doing so in at least one way that is categorised as unlawful.

Figure 3: Lawfulness of consumption (at least one unlawful source used), by content type 2015–2022

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 made 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.

As was the case in previous years, respondents were more likely to source content unlawfully when downloading, and less so when streaming. However, this year's uplift in overall unlawful consumption was driven by a significant increase in unlawful streaming activity – up 9% to 33% (from 24% in the last two years). Meanwhile, rates of unlawful downloading remained stable year-on-year at 42%, maintaining lower levels following a decline from 49% in 2020.

33%

of those who **streamed / accessed** content online in the past 3 months did so in at least some **unlawful** ways (a significant increase from 24% reported in both 2021 and 2020). This increase is likely to be at least partly driven by the introduction of a new unlawful method of consumption to the survey in 2022– paying a small fee to access one or many subscription services through a shared / unknown account.[5] The addition of this method likely enabled some respondents to better describe how they consume media online than they have been able to in previous years (when these behaviours would have likely been captured under 'other' or lawful 'paid streaming services' and would not have counted towards unlawful access calculations).

42%

of those who had **downloaded** content online in the past 3 months did so in at least some **unlawful** ways (in line with 43% last year, maintaining lower levels following the decline from 49% reported in 2020 despite an increase in infringement overall).

[5] This was added as an option across all content areas (rather than just video games, where it was previously included).

Methods of consumption

75% of respondents who consumed at least one type of media online (music, movies, TV programs, live sports, video games) streamed this content via a paid subscription service (in line with 74% last year, and up from 72% in 2020).

As shown in Table 2 overleaf, across all content types, the most common ways of consuming content were accessing media online by streaming the content through a paid for subscription service (75%), or on-demand catch-up services (54%). Changes to the survey in 2022 have standardised the ways used to consume media online that respondents are asked about (and that are reported on) across all five core media types of music, movies, TV, live sport, and video games. While caution should be used when comparing 2022 results with those of prior years, the data suggests some broad trends in online media consumption methods over the past three years:

- Overall use of paid for subscriptions and on-demand catch up services has remained largely stable over time.
- Use of free versions or tiers of paid subscription services has increased. This could be due to an increase in the number of subscription services available and offering free versions or trials, but is also likely in part resultant from changes to the survey, where this option was included in the list of consumption options for consumers of movies and TV content for the first time in 2022.
    - Note that in the 2022 survey YouTube was moved from being an example of social media to being an explicit example of a free version or tier of a streaming service across all content types (in order to more consistently define the methods). The placement of YouTube accounts for some of the changes observed to these two methods in 2022, and changes over time will be more visible in future surveys.
- A number of lawful consumption methods appear to be declining in use, including pay-per-view and/or download services, Pay TV services that allow online viewing, and 'saving offline' via subscription services. Consumption via social media is also lower in 2022, but this is more likely to be due to questionnaire changes, where the example of YouTube has been moved from a social media service to a streaming service.
- A number of unlawful consumption methods also appear to be slowly waning, including all types of file sharing (Torrenting, sharing between individuals, use of cyberlockers), use of third-party content apps via set-top boxes, and accessing cracked or modified gaming content.
- New potentially unlawful consumption methods are emerging, and were included in the survey in 2022 to better capture consumption behaviours. The results suggest that they are being taken up by a notable proportion of respondents – in particular paying a small fee to access shared / unknown login credentials for subscription services (16%), and watching full-length content for free online via dedicated websites without payment (10%). These methods have been added to the survey across all relevant content types for the first time in 2022. With additional years of data, it will be possible to determine whether use of these methods has stabilised or is currently in a growth phase.

Table 2: Ways used to consume (download or stream) media online in the past 3 months

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

Method	2020 (n=1,848)	2021 (n=1,724)	2022 (n=,1,793)
LAWFUL			
Streaming via a paid for subscription service / A paid subscription to a content platform that can be accessed online	72%	74%	75%
Accessing content using your internet browser via live 'free-to-air' or catch-up services	50%	50%	54%
EXPANDED ACROSS ALL CONTENT TYPES IN 2022 /YouTube EXAMPLE ADDED A free version / tier of a music / video streaming service	27%**	26%**	41%
Downloading video games for free (video games only)	21%	20%	24%
A subscription to a Pay TV service that allows you to watch online	28%	27%	22%
YouTube REMOVED AS AN EXAMPLE IN 2022 Social media services	49%	47%	21%
'Saving offline' via a paid for subscription service	24%	21%	19%
Paying a single fee to download individual songs / albums / movies / programs / games through services	28%	25%	18%
'Pay-per-view' / paying a single fee to rent / access individual movies / programs / sports events through a service	13%	12%	8%
Free scheduled broadcasts by an official source on social media sites or other official website / app (live sport only)	16%	14%	5%
UNLAWFUL			
EXPANDED ACROSS ALL CONTENT TYPES IN 2022 Paying a small fee to access one or many subscription services through a shared / unknown account (e.g. shared login credentials)	4%*	3%*	16%
Through other apps / services that you do not have a paid subscription to that can be accessed through app marketplaces	Not asked	10%	12%
Receiving a link to download / stream music / movies / TV / sports / video games made available by someone else	17%	15%	11%
NEW Through websites that you do not have to pay to access, which allow you to stream full-length TV, movie, or live sport content for free	Not asked	Not asked	10%
Downloading music / video content from sites such as YouTube using an online converter or 'stream ripping' software, app or browser extension	14%	12%	9%
BitTorrent or another file-sharing or peer to peer service	12%	10%	8%
Receiving the file(s) directly from someone else	12%	11%	7%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box	10%	9%	7%
A file hosting website or cyberlocker	12%	10%	7%
Downloading modded versions of mobile games for free (video games only)	7%	6%	4%
A broadcast by an individual (i.e. not an official source) on social media sites like Facebook, Twitter, Twitch, Periscope, TikTok or Snapchat, or via sites such as YouTube or Daily Motion (live sport only)	7%	6%	2%
Downloading emulator versions of typically older games for free (video games only)	4%	3%	2%
Downloading a crack for a game to bypass Digital Rights Management (DRM) or other security protocols for lawfully downloaded games (video games only)	4%	2%	1%
OTHER			
Downloading or streaming for free from the internet, without really being sure where it comes from	31%	26%	19%
Other	5%	4%	6%

Q14/Q22/Q29/Q37/Q43 Which of the following ways have you used to download/stream/access [media content] in the past 3 months? (Multiple response). Note: Figures for 2020 and 2021 are calculated using Q18/Q25/Q33/Q39/Q46. Compared to this time last year, how often are you using this method to download/stream/access [media content]?
* asked ony of video games consumers prior to 2022.
** only asked of music consumers prior to 2022.

Range of consumption behaviours and lawfulness

Range / breadth of content types consumed

In 2022, compared to previous years, individual respondents reported accessing a greater range of content types online overall. The range of content types accessed in ways that were likely unlawful also increased, but by a smaller amount. This suggests that the overall increase in infringement rates can in part be attributed to the pattern of respondents accessing an increased diversity of content online than in previous years, more so than to increases in unlawful consumption of specific media types. In short, respondents are accessing **more media online in similar ways**, resulting in **more infringement overall**, rather than consuming media in ways that have a higher level of unlawfulness.

The relatively smaller increases in unlawful consumption of specific media types that were observed may, at least in part, be driven by the survey changes made in 2022 and specifically the addition of new and mostly unlawful ways of accessing content, explored in greater detail in the next section of the report and on page 5.

3.2 is the **average number of content types streamed / downloaded / shared** by those who consumed any content online in the past three months (music, movies, TV programs, live sports, video games). This is up from 2.9 last year, and 3.0 in 2020. The overall average increase has been driven by an increase in the proportion of respondents accessing the full range of content types explored as part of this survey, now with just over a quarter (27%) of all media consumers accessing 5 out of 5 content types online in the past three months (up from 17% in 2021, and 21% in 2020).

0.8 is the **average number of content types streamed / downloaded / shared <u>in ways that are likely unlawful</u>** by those who consumed any content online in the past three months, up from 0.6 last year, and 0.7 in 2020. This relatively modest increase was associated with a rise in the proportion of respondents indicating they had accessed 1-2 content types in at least some ways that are likely unlawful (27%, up from 20% in 2012, and 22% in 2020).

Infringers consume a greater number of content types than non-infringers (3.9 out of 5 types compared to 3.0 out of 5 types for non-infringers), and this pattern has been stable over time.

Range / breadth of ways used to consume content online

Over the past three years, the average number of methods individuals reported using to consume content online (see Table 2 for full list) has declined to 4.0 (down from 4.4 last year and 4.7 in 2020). The majority of methods used (77%) were deemed to be only lawful ways of consuming media (down from 82% last year, and 80% in 2020). 16% were classified as potentially unlawful ways of accessing media (up from 11% last year, and 12% in 2020), with the remaining ways classified as 'other'.

As noted elsewhere in this report, accessing subscription streaming services is becoming increasingly commonplace, while using pay-per-use type services is on the decline, together with many unofficial or social sharing methods. However, the increase in the proportion of ways used to consume that are potentially unlawful is at least partly due to the 2022 survey changes, which involved adding a range of extra methods for accessing media for respondents to choose from. Many of these additional methods were categorised as potentially unlawful. For more details, see next section of this report, and page 5.

4.0 is the average number of ways (both lawful and unlawful) respondents used to consume content online, down from 4.4 last year and 4.7 in 2020.

Compared to non-infringers, infringers tend to access a broader range of content types online (see previous section), as well as to use more than twice the number of methods on average to access this content. In general, infringers were also much more likely to download (68% of infringers downloaded content compared to 30% of non-infringers) and/or share content (34% compared to 9% of non-infringers). Streaming was near universally used by both infringers (94%) and non-infringers (98%). This pattern of results has remained largely stable over the past three years.

2.8 is the average number of methods non-infringers used to consume content online, which has remained mostly stable over the past three years (2.7 in 2021, 2.8 in 2020). 94% of these ways were lawful ways of consuming content (the rest were classified as 'other'), also largely stable over time (95% in 2021, 93% in 2020).

6.3 is the average number of methods infringers used to consume content online, down from 8.7 last year and 8.5 in 2020. 54% of methods used by infringers were classified as only lawful (in line with 57% in 2021 and 56% 2020), and 41% as potentially unlawful (up from 36% in 2021, and 35% in 2020). The remainder were classified as 'other'.

Isolating the impact of adding 'paying to access one or many subscription services through a shared / unknown account (for example, shared login credentials)'

As part of the changes made to the survey in 2022, an additional way of consuming content was added across all content areas – paying a small fee to access one or many subscription services through a shared / unknown account (for example, shared login credentials). This consumption category had been included in the survey for video game consumers since 2020, but shown to consumers of other types of media for the first time in 2022. For more details on the changes made in the 2022 survey, please see page 5.

Whenever changes to a survey instrument are made, it is possible that some of difference observed in results between survey periods will be the result of the methodological shift. In this instance, it is likely that providing respondents with additional unlawful response options to choose from may have contributed to an increase in the estimated rates of infringement. It may also be in part due to the increased ability of the survey to *detect* unlawful behaviours in 2022, rather than an increase in the *incidence* of unlawful behaviours per se.

While it is not possible to perfectly isolate the extent to which any changes in infringement rates are due to methodological changes, the data does suggest that at least some of the increase may be attributed to this change. **Analysis of the 2022 lawfulness results found 4% of those who consumed at least one type of media online in the past three months were classified as infringers <u>only</u> because they selected the newly included paid shared credential option (that is, they only reported lawful consumption methods other than this method)**. If this paid shared credential option had not been made available to respondents, they would have likely selected 'paid for subscription service' (lawful) or 'other' (not counted) to describe how they consume media online, and been subsequently classified as non-infringers. **At face value, if these consumers would otherwise have been classified as non-infringers, this one change may have resulted in an overall infringement rate of 35% (as opposed to the final 2022 result of 39%) – which, while still higher than the 2021 result of 30%, would have been in line with 34% reported in 2020.** This pattern is also evident in infringement rates across all media types, as shown in Table 3 below.

Table 3: Lawfulness of consumption methods – unique combinations of options selected in 2022

Base: Respondents who had downloaded or streamed / accessed given media content in the past 3 months

Lawfulness of media consumption options selected	Any media content (n=1,766)	Music (n=1,166)	Movies (n=1,374)	TV (n=1,421)	Live sport (n=732)	Video games (n=846)
Only lawful	61%	74%	74%	78%	74%	74%
Only lawful + paid shared credentials	4%	3%	3%	2%	2%	4%
Mix of lawful and unlawful	33%	16%	18%	14%	14%	14%
Only unlawful	3%	7%	6%	6%	10%	7%
Infringers – respondents who consumed media in at least one unlawful way **(excluding paid shared credentials)**	**35%**	**23%**	**24%**	**20%**	**24%**	**22%**
Infringers – respondents who consumed media in at least one unlawful way **(including paid shared credentials) – current definition**	**39%**	**26%**	**26%**	**22%**	**26%**	**26%**

Q15/Q16/Q23/Q24/Q30/Q32/Q38/Q44. How is the way that you download/stream/access [media content] typically split across the following? (Enter percentage of time for each option)

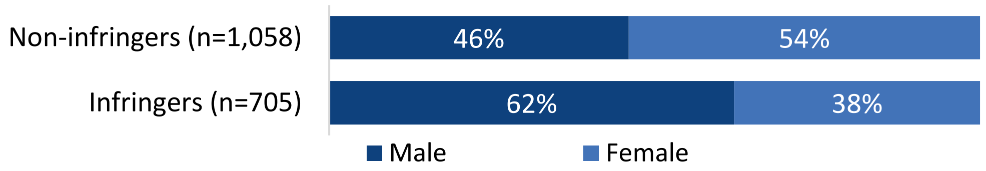
Profile of infringers

A demographic profile of infringers was created to understand the types of respondents who had accessed media in at least some unlawful ways (infringers) compared to those who had not (non-infringers – those who accessed media in only lawful ways).

As shown in Figure 4-7, infringers were more likely to be male (62%, compared to 46% of non-infringers), younger (55% aged 12-34, compared to 34%), have a higher household income (45% $80K+, compared to 40%), and be working full-time or studying (38% compared to 30%, and 18% compared to 10% respectively).

Figure 4: Gender of infringers versus non-infringers, 2022

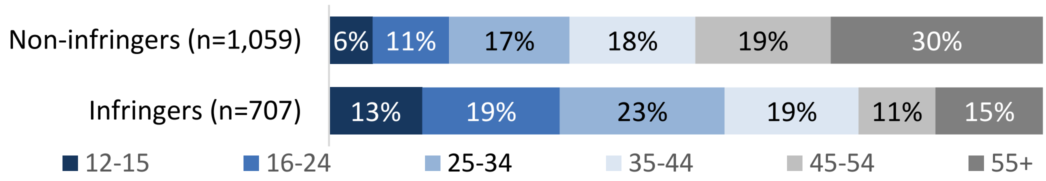
Base: Respondents who had consumed any content type online in the past 3 months



Q7. Are you..?

Figure 5: Age of infringers versus non-infringers, 2022

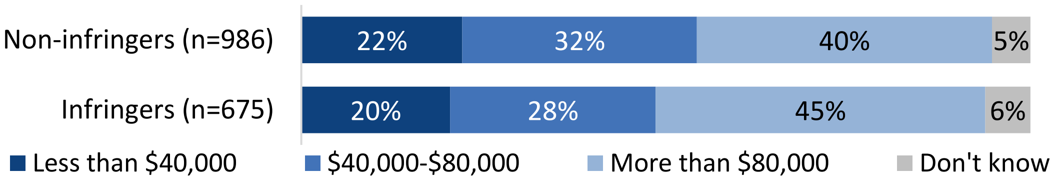
Base: Respondents who had consumed any content type online in the past 3 months



q1 / q6. How old are you?

Figure 6: Household income level of infringers versus non-infringers, 2022

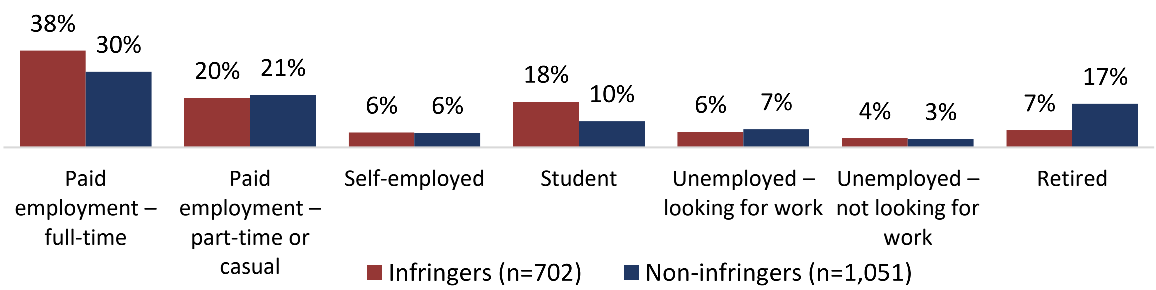
Base: Respondents who had consumed any content type online in the past 3 months



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

Figure 7: Employment status of infringers versus non-infringers, 2022

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



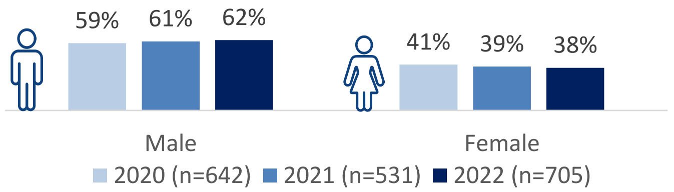
q10. What is your employment status?

Categories not shown: Stay at home parent or carer (2% in 2020, 2% in 2021, 3% in 2022), Prefer not to say (<1% in 2020, <1% in 2021, 2% in 2022), Other (2% in 2020, <1% in 2021, 1% in 2022). Part time and casual result is shown aggregated.

Figures 8-11 illustrate that the demographic profile of infringers over time, which has remained largely stable over the past three years. It is interesting to note that in 2022, the profile of infringers is very slightly more likely to be employed people on higher incomes, though this is only a marginal variation in the larger perspective of where unlawful consumption tends to occur.

Figure 8: Gender of infringers, 2020-2022

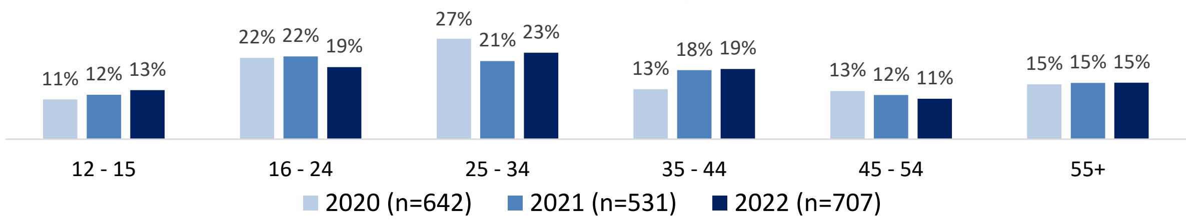
Base: Infringers



Q7. Are you..?

Figure 9: Age of infringers, 2020-2022

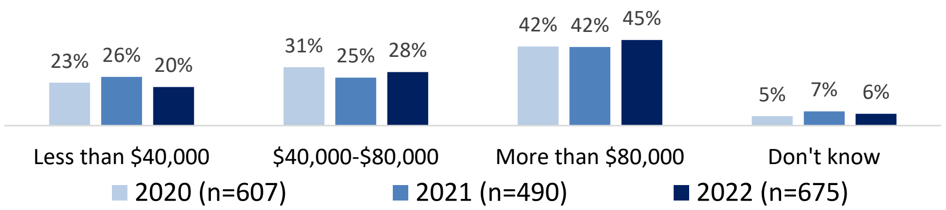
Base: Infringers



q1 / q6. How old are you?

Figure 10: Household income level of infringers, 2020-2022

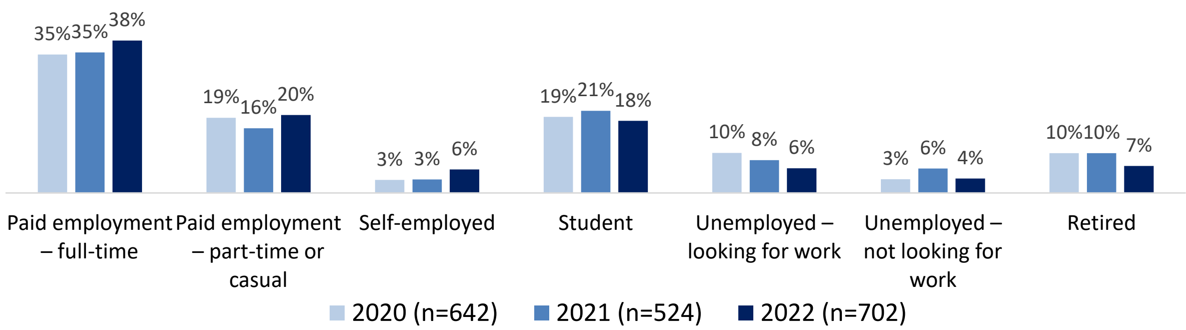
Base: Infringers



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

Figure 11: Employment status of infringers, 2020-2022

Base: Infringers



q10. What is your employment status?

Categories not shown: Stay at home parent or carer (2% in 2020, 2% in 2021, 3% in 2022), Prefer not to say (<1% in 2020, <1% in 2021, 2% in 2022), Other (2% in 2020, <1% in 2021, 1% in 2022). Part time and casual result is shown aggregated.

Part 2: Consumption of Specific Content Areas

V. Music

Music

Content consumption summary (2022)

48% (+3%) of all respondents **consumed** music content online in 2022

74% (-5%) of music consumers accessed all music content ONLY **lawfully**

26% (+5%) of music consumers accessed at least some music content **unlawfully**

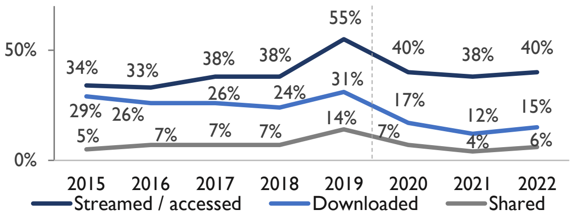
How is music content consumed through the internet?

In the past 3 months:

40% **streamed / accessed** music online

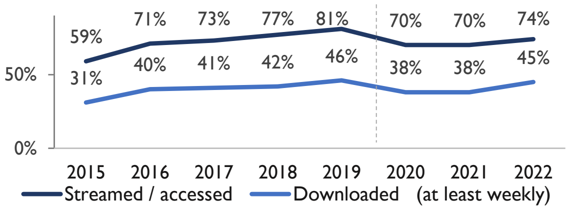
15% **downloaded** music online

6% **shared** music online



74% of those who **streamed / accessed** music online did so **at least weekly**

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



Where are people going to consume music content online?

In 2022, the top three ways to **stream** music content online were:

1. A paid for subscription service – 54%
2. A free version of a streaming / download service that has a paid premium tier – 52%
3. Listening to the radio online either live or through catchup services – 25%

In 2022, the top three ways to **download** music content online were:

1. Saving offline via a paid for subscription service – 52%
2. Downloading music from sites such as YouTube using an online converter or stream ripping software, app or browser extension* – 31%
3. Pay-per-view / paying a single fee to download individual songs or albums through services – 23%

In 2022, the top three sites or services to **consume** music content online were:

62% (N/A) Spotify (all versions combined)

51% (-9%) YouTube (all versions combined)

19% (+4%) Facebook

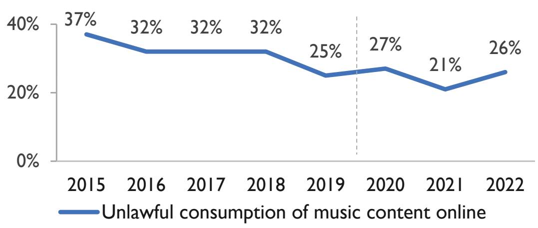
How much music content consumption online was at least partly unlawful?

12% of those who **streamed / accessed** music online did so unlawfully

4% of average time spent **streaming / accessing** music was unlawful

63% of those who **downloaded** music online did so unlawfully

40% of average time spent **downloading** music was unlawful



Characteristics of Infringers

Male (66%)

Aged 12 to 24 years (40%)

Household > $40,000 (83%)

Behaviours of Infringers

Download (76%) and share (25%) music online

Unlawfully consume movies / films (67%), TV programs (59%), sports (51%) and video games (46%) online

NOTE: Caution should be used when comparing 2020-22 results to previous years due to methodology changes (indicated by vertical dotted line in charts). Numbers in brackets present the change in the result compared to the previous year.
* Denotes methods of streaming or downloading music where at least some of this is potentially unlawful.

Chapter overview

This chapter presents the findings in relation to music consumption online. 48% 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 **only** lawfully (74%, non-infringers). The remaining quarter consumed at least some music in ways likely to be unlawful (infringers), however it is important to note that most infringers also streamed or downloaded music through some lawful sources as well. Infringement was more commonly reported when downloading music, most commonly through online converters or 'stream ripping' software, or by paying a small fee to access subscription services through a shared or unknown account which also enable users to download content for offline consumption.

See page 5 for information about important modifications to the survey methodology. These changes may impact on lawful and unlawful consumption results in this section. The changes were made to make the survey more sensitive overall to some emerging methods of unlawful consumption.

Consumption behaviours

48% of respondents had **engaged with music online in the past 3 months** (downloaded, streamed or shared)[6], rising again following a significant decrease last year (45%) to similar levels reported in 2020 (50%).

Overall, streaming remained the most common way that respondents had engaged with music (40%, in line with 38% in 2021 and 40% in 2020), whilst 15% had downloaded (slightly up from 12% last year, and roughly in line with 17% in 2020), and 6% had shared music online (also slightly up on 4% last year, and in line with the 2020 result of 7%).

40% of all respondents streamed music, or 83% of music consumers

15% of all respondents downloaded music, or 32% of music consumers

As shown in Table 4, the most commonly reported way that respondents had consumed music was streaming it via paid subscription services (46%), or via a free version or tier of a subscription service (44%). These two methods have been the dominant ways of accessing music over the past three years, and their use has slowly increased since 2020.

[6] Q12. In the past 3 months, which of the following have you streamed / accessed, downloaded, or shared / uploaded through the internet? (n=2,400).

Reports of accessing music via social media have declined markedly this year, (20%, down from 49% last year and 48% in 2020), however this is likely due to changes relating to how YouTube has been described in the survey.[7]

Paying a one-off fee to download an individual song or album has become less common over time, now down to 8%, from 15% in 2020. Other ways of downloading music content also appear to be decreasing, including using 'stream ripping' software, and file sharing using BitTorrent, using cyberlocker, or sharing files directly between individuals.

Table 4: Ways used to consume (download or stream) music online

Base: Respondents who had downloaded or streamed music content online in the past 3 months

Method	2020 (n=1,245)	2021 (n=1,098)	2022 (n=,1,214)
LAWFUL			
Streaming via a paid for subscription service*	41%	45%	46%
A free version / tier of a music streaming service*	41%	42%	44%
Listening to the radio online (via websites or apps) either live or through catchup services	26%	26%	21%
Social media services*	48%	49%	20%
'Saving offline' via a paid for subscription service	22%	17%	17%
Paying a single fee to download individual songs / albums through services	15%	12%	8%
UNLAWFUL			
NEW Paying a small fee to access one or many subscription services through a shared / unknown account (e.g. shared login credentials)	Not asked	Not asked	11%
Receiving a link to download / stream music made available by someone else	12%	9%	10%
Downloading music content from sites such as YouTube using an online converter or 'stream ripping' software, app or browser extension	15%	12%	10%
BitTorrent or another file-sharing or peer to peer service	9%	7%	3%
Receiving the file(s) directly from someone else	12%	9%	6%
A file hosting website or cyberlocker	14%	11%	5%
OTHER			
Downloading or streaming for free from the internet, without really being sure where it comes from	32%	21%	15%
Other	2%	1%	1%

Q14a/b Which of the following ways have you used to download/stream music in the past 3 months? (Multiple response).
Note: Figures for 2020 and 2021 are calculated using 'Q18. Compared to this time last year, how often are you using this method to download/stream music content?'. Caution is advised when comparing results between 2022 and prior years.
* Note: In 2022, the YouTube example was reallocated to streaming services to better reflect its function it the marketplace. Prior to 2022, YouTube was included as an example under the social media category.

Reflecting overall results, respondents that streamed music content were more likely to do so using only lawful ways. This was in contrast to those who download music, explored in greater detail further in this chapter.

[7] In the past, YouTube was provided as an example under the 'social media' option. This year, it was grouped with streaming services, better reflecting how it currently operates in the music marketplace.

In terms of the services used to access music online, Spotify and YouTube continued to dominate, with each accessed by over half of music consumers (62% Spotify / Spotify Premium combined, 51% YouTube / YouTube premium combined – see Figure 12). Social media sites also ranked highly among music consumers, with Facebook (19%), Instagram (13%) and Tik Tok (10%) all in the top ten services used to access music.

Figure 12: 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

Service	2020 (n=1,249)	2021 (n=1,112)	2022 (n=,1,139)
All Spotify versions combined	n/a	n/a	62%
All YouTube versions combined	61%	60%	51%
YouTube Music	59%	57%	42%
Spotify Premium	Not asked	Not asked	38%
Spotify	52%	55%	34%
Facebook	19%	15%	19%
Apple Music	21%	21%	16%
YouTube Music Premium	8%	8%	15%
Instagram	Not asked	Not asked	13%
Amazon Music	10%	9%	12%
SoundCloud	8%	7%	10%
Tik Tok	Not asked	Not asked	10%

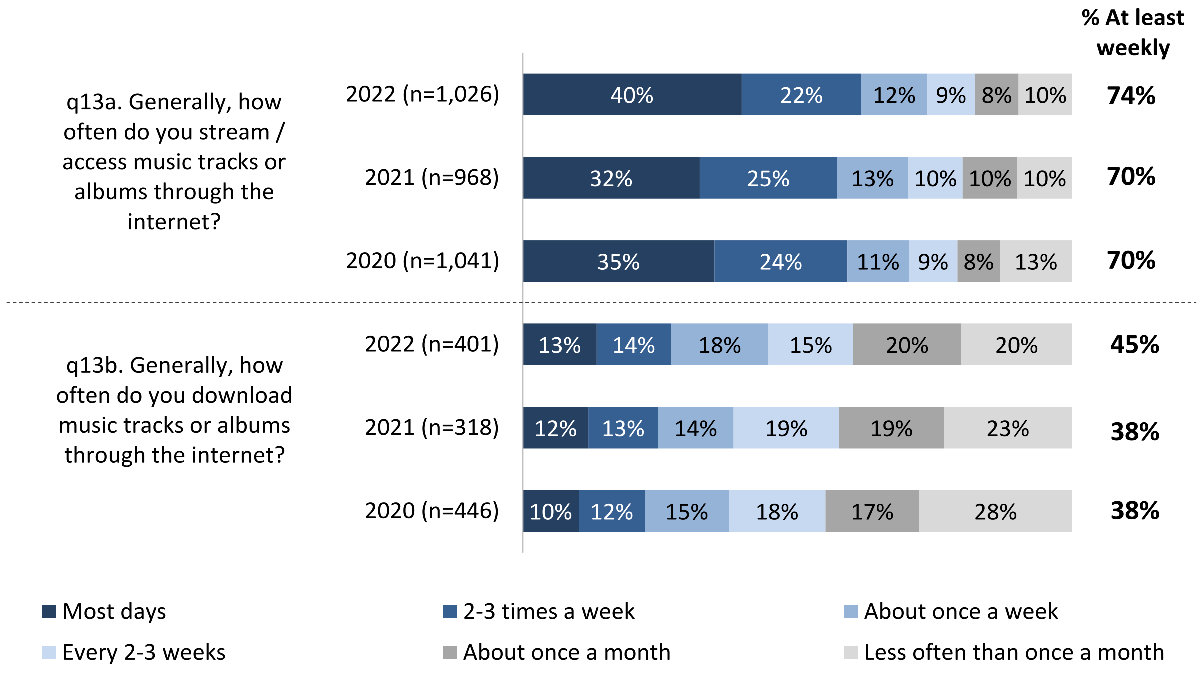
Q17A/B/D/E/F/G. Which of the following [access category] services have you used to access music online in the past 3 months? (Results aggregate several multiple response questions). Note: Prior to 2022, this question was asked as a single multiple response question. The question was broken up into several questions in 2022 when the service list became too long for respondents to easily and accurately respond to. Due to this change, comparisons of results between these periods should be made with caution.

Frequency of consumption

As shown in Figure 13, the majority of those who streamed or accessed music online at all did so at least weekly (74% of music streamers, 30% of all respondents). Music was downloaded relatively less frequently, with 45% of downloaders (7% of all respondents) indicating that they downloaded music tracks or albums at least weekly. Both these figures were consistent with previous years.

Figure 13: 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 5 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 previous surveys.

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 generally higher among **students**, and lowest amongst those who are **retired**.

Table 5: Consumption of music online, by age, gender, household income and employment status, 2022

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=	1,249	669	579	365	283	258	198	90	55	216	338	541	460	193	79	74	63	208	84	36	67
Consume music online	**48%**	**54%**	**44%**	**68%**	**64%**	**58%**	**49%**	**26%**	**21%**	**36%**	**49%**	**57%**	**58%**	**53%**	**56%**	**53%**	**49%**	**73%**	**56%**	**31%**	**18%**
Stream / access music	**40%**	**44%**	**36%**	**53%**	**54%**	**50%**	**43%**	**22%**	**18%**	**31%**	**40%**	**47%**	**48%**	**45%**	**49%**	**43%**	**42%**	**59%**	**48%**	**25%**	**15%**
Download music	**15%**	**19%**	**12%**	**29%**	**17%**	**16%**	**12%**	**10%**	**6%**	**11%**	**16%**	**18%**	**18%**	**20%**	**16%**	**21%**	**11%**	**26%**	**17%**	**10%**	**4%**
Streamed n=	1,026	542	483	277	239	222	169	74	45	181	269	450	379	162	66	58	54	163	73	29*	54
2-3 times a week or more often	62%	59%	65%	67%	70%	63%	54%	55%	41%	53%	59%	67%	64%	62%	70%	69%	51%	67%	66%	71%	33%
About once every 1-3 weeks	21%	23%	18%	18%	16%	20%	22%	26%	35%	25%	24%	17%	21%	22%	17%	12%	19%	15%	20%	16%	39%
About once a month or less often	18%	18%	17%	15%	14%	17%	24%	19%	24%	22%	16%	16%	15%	16%	13%	19%	30%	19%	13%	13%	28%
Downloaded n=	401	238	163	160	78	70	51	28*	14*	70	119	162	144	69	27*	24*	14*	80	27	12*	15*
2-3 times a week or more often	27%	29%	24%	38%	29%	31%	20%	3%	0%	32%	26%	27%	27%	24%	41%	2%	28%	43%	28%	43%	0%
About once every 1-3 weeks	33%	35%	30%	38%	32%	35%	25%	40%	15%	29%	37%	34%	37%	47%	26%	36%	22%	29%	23%	32%	5%
About once a month or less often	40%	36%	46%	24%	39%	34%	55%	57%	85%	39%	37%	38%	37%	29%	34%	62%	50%	28%	49%	25%	95%

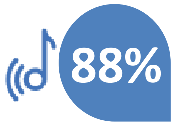
Note: Employment status is a multiple response question, with respondents able to select multiple relevant options. As a result, the number of respondents in these categories may sum to more than the overall number of respondents. Total number of respondents may vary across categories, depending on the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

- Caution: low sample sizes for some groups.

Sources of streaming music

As shown in Figure 14, paid subscription services were the most common means of streaming music content, reportedly being used by over half of those who access or stream music (54%). Around half of those who access or stream music (52%) also reported accessing music via the free tier of subscription services such as Spotify or YouTube, and around a further quarter said they listen to online radio (25%) and/or listen to music on social media (23%).

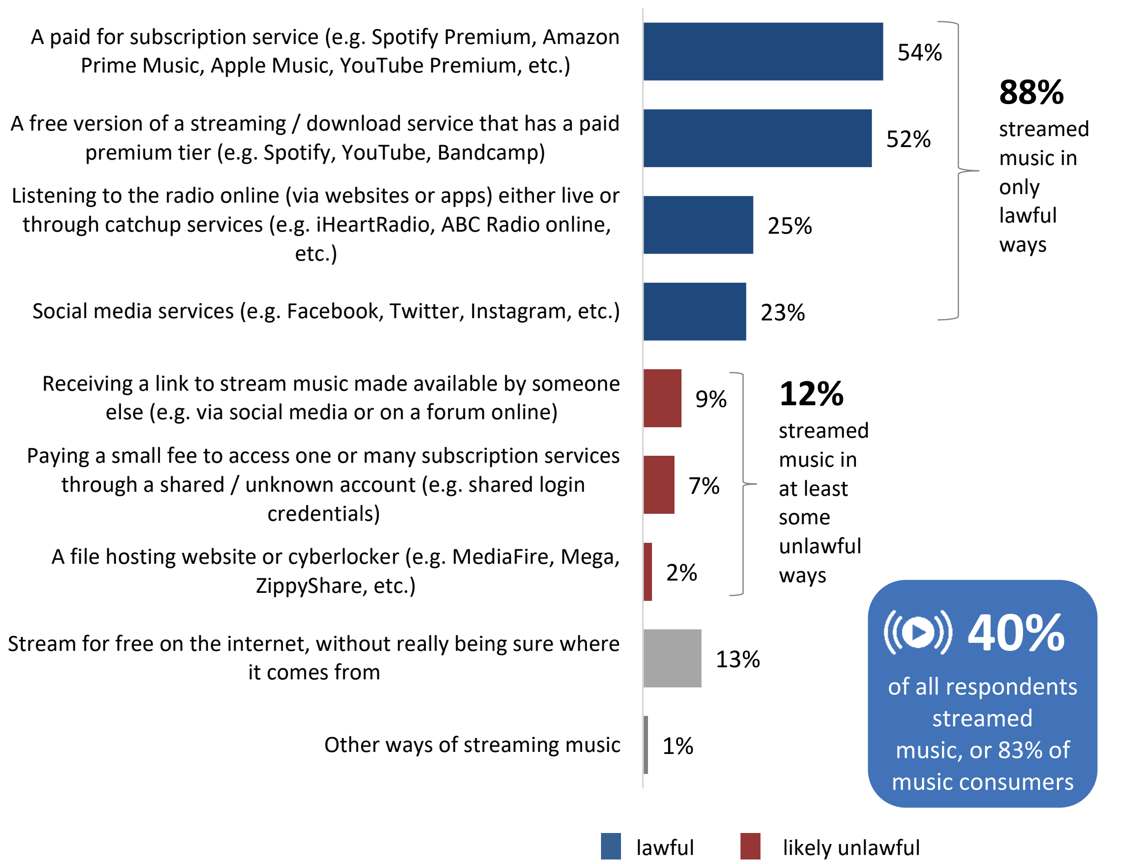
Respondents were classified into three consumer groups: using lawful sources only, using unlawful sources only, or using a mix of lawful and unlawful sources to stream music.[8]



of respondents who streamed music **only did so lawfully** (compared to 93% last year, and 90% in 2020). One-in-ten (10%) used a mix of lawful and unlawful sources to stream music online (broadly in line with 7% last year, and 10% in 2020), and only 2% of respondents used only unlawful sources (but up from 0% in previous years).

Figure 14: Typical ways of consuming music online – streaming (2022)

Base: Respondents who streamed / accessed music in the past 3 months (n=1,026)



q14b. Which of the following ways have you used to stream music in the past three months? (Multiple response)

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

As shown in Figure 15, **respondents who streamed music overwhelmingly did so lawfully**, having reportedly used:

- **lawful sources an average of 90% of the time** – down slightly from 94% last year and the year before, owing to a decrease in the time spent streaming music via social media (5%, down from 27% last year and 29% in 2020). This decline is most likely due to the reallocation of YouTube to streaming services to better reflect its function it the marketplace (in previous years, YouTube was included as an example under the social media category. In 2022, it is provided as an example in the streaming categories); and
- **unlawful sources an average of 4% of the time** – up from 1% in previous years, which is largely due to the addition of new categories in the 2022 survey that enabled respondents to indicate if they pay a small fee to access subscription services through a shared / unknown account (3%), or received links to stream music made available by someone (1%). In previous surveys these may have been captured within the neutral 'other' categories.

Figure 15: Average proportion of time spent streaming music, by source[9]

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

Source	2020 (n=1,041)	2021 (n=968)	2022 (n=1,026)
LAWFUL	**94%**	**94%**	**90%**
A paid for subscription service (e.g. Spotify Premium, Apple Music, YouTube Premium)*	32%	35%	44%
Free version of a streaming / download service that has a premium tier (e.g. Spotify, YouTube)*	26%	26%	33%
Listening to the radio online (via websites or apps) either live or through catchup services	7%	7%	8%
Social media services (e.g. Facebook, Twitter, Instagram, etc.)*	29%	27%	5%
UNLAWFUL	**1%**	**1%**	**4%**
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	3%
NEW Receiving a link to stream music made available by someone else (e.g. via forums)	Not asked	Not asked	1%
A file hosting website or cyberlocker (e.g. MediaFire, Mega, ZippyShare, etc.)	1%	1%	<1%
OTHER	**5%**	**4%**	**5%**
Stream for free on the internet, without really being sure where it comes from	4%	4%	5%
Other	1%	1%	1%

Q16. How is your music streaming time typically split across the following? (Enter percentage of time for each option)
* Note: In 2022, the YouTube example was reallocated to streaming services to better reflect its function it the marketplace. Prior to 2022, YouTube was included as an example under the social media category.

[9] Please note that results reflect the average proportion of time spent using each source identified by the respondent and do not factor in the actual amount of time each respondent spent streaming content.

As shown in Table 6, music streaming behaviours varied by certain demographic characteristics.

All age groups 25 and over spent an average of just 1%-3% of their time streaming music using unlawful sources, compared to 10% of those aged **12-24**. Use of paid streaming services declined with age, while use of free versions of streaming services increased – as did listening to online radio. Those aged 55-64 spent the most time streaming music for free off the internet without really knowing the actual source.

Males reported a slightly higher proportion of their time streaming music using unlawful sources (6% compared to 2% for females).

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

Those who were self-employed, students or retired generally reported less time spent using a paid for subscription service to stream music. **Students**, like the 12-24 age group above, reported a higher average proportion of time streaming music from unlawful sources (11%) – primarily by paying a small fee to access one or many subscription services through a shared / unknown account (10%).

Table 6: Average proportion of time spent streaming music, by age, gender, household income and employment status, 2022

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=	1,026	542	483	277	239	222	169	74	45	181	269	450	379	162	66	58	54	163	73	29*	54
Lawful	**90%**	**87%**	**94%**	**85%**	**95%**	**92%**	**95%**	**76%**	**93%**	**90%**	**89%**	**92%**	**92%**	**88%**	**93%**	**94%**	**97%**	**84%**	**91%**	**99%**	**86%**
A paid for subscription service	44%	44%	44%	44%	53%	46%	45%	21%	32%	41%	40%	49%	52%	41%	53%	37%	43%	38%	44%	49%	33%
A free tier of a music streaming service	33%	30%	37%	30%	31%	32%	35%	39%	46%	40%	34%	29%	27%	30%	32%	41%	43%	35%	37%	48%	40%
Listening to the radio online either live or through catchup services	8%	8%	8%	5%	5%	8%	10%	11%	11%	4%	9%	8%	9%	9%	5%	11%	2%	5%	7%	1%	8%
Social media services	5%	5%	6%	7%	5%	5%	4%	5%	3%	5%	5%	5%	5%	7%	3%	4%	8%	7%	3%	2%	5%
Unlawful	**4%**	**6%**	**2%**	**10%**	**3%**	**3%**	**1%**	**3%**	**3%**	**3%**	**3%**	**5%**	**4%**	**4%**	**2%**	**1%**	**1%**	**11%**	**3%**	**1%**	**4%**
Paying a small fee to access one or many subscription services through a shared / unknown account	3%	4%	1%	7%	2%	2%	1%	1%	0%	2%	1%	3%	2%	2%	2%	0%	0%	10%	2%	1%	1%
Receiving a link to stream music made available by someone else	1%	1%	1%	2%	0%	1%	1%	2%	3%	2%	1%	1%	1%	2%	1%	1%	0%	1%	2%	0%	3%
A file hosting website or cyberlocker	0%	1%	0%	0%	1%	1%	0%	0%	0%	0%	1%	1%	1%	0%	0%	0%	1%	0%	0%	0%	0%
Other	**5%**	**7%**	**4%**	**5%**	**2%**	**5%**	**4%**	**21%**	**5%**	**6%**	**7%**	**3%**	**4%**	**8%**	**5%**	**5%**	**2%**	**5%**	**6%**	**0%**	**10%**
Stream for free from the internet, without really being sure where it comes from	5%	6%	3%	4%	2%	4%	4%	16%	3%	6%	6%	3%	3%	8%	5%	4%	2%	4%	6%	0%	7%
Other	1%	1%	1%	0%	0%	0%	1%	5%	2%	1%	1%	0%	1%	0%	0%	2%	0%	1%	0%	0%	3%

Q16. How is your music streaming time 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 categories 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.

Sources of downloading music

Respondents were asked to nominate the sources they typically used to download music online as well as stream it. In contrast to music *streaming*, which was overwhelmingly done through lawful sources, the use of potentially unlawful sources was much more common among *downloaders* of music content.

37% used **only lawful** sources to download music online (in line with 38% last year, and 34% in 2020).

31% used a **mix of lawful and unlawful** sources to download music online (down from 42% last year, and 47% in 2020)[10].

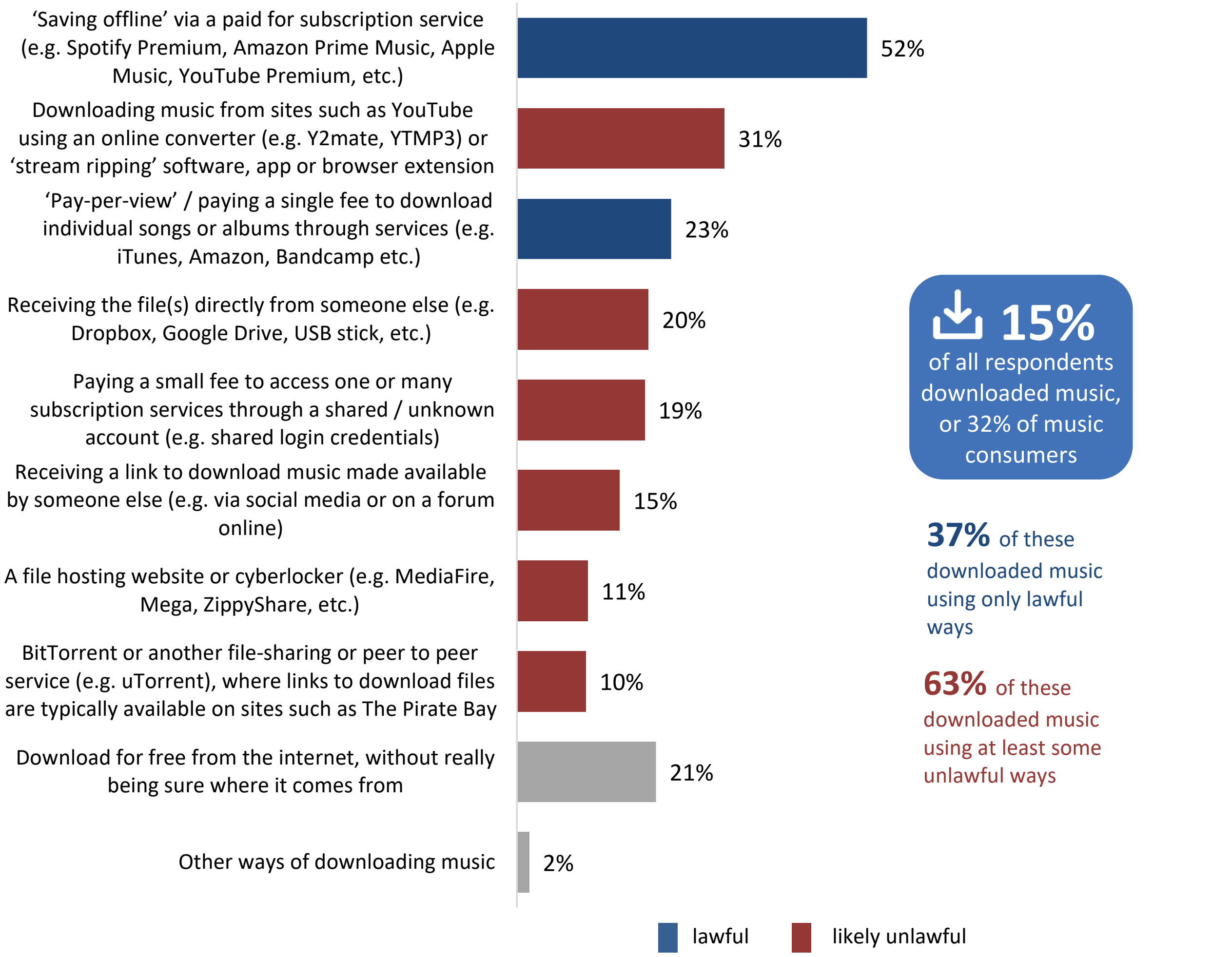
32% used **only unlawful** sources to download music online (up significantly from 19% last year, and 20% in 2020)[10.]

As shown in Figure 16 saving offline using paid subscription services was the most common and lawful way of downloading music (52%). However, around one-in-three (31%) also reported using methods that were likely to be unlawful such as ‘stream ripping’ software, receiving files directly from others (20%), and/or paying a fee to access shared login credentials (19%).

[10] This may be, at least in part, due to the addition of a new access method in the 2022 survey – paying a small fee to access shared login credentials for subscription services – which is categorised as unlawful. In previous years, these behaviours may have been captured under ‘other’ and would not have contributed to lawfulness calculations. Respondents who use only ‘other’ sources have been excluded from this calculation.

Figure 16: Typical ways of consuming music online – downloading

Base: Respondents who downloaded music in the past 3 months (n=401)



q14a. Which of the following ways have you used to download music in the past three months? (Multiple response)

Respondents were also asked to indicate the proportion of their time that was spent using each source to download music.

As shown in Figure 17, **respondents reported using lawful sources to download music about half of the time**. Specifically, they reported using:

- **lawful sources an average of 48% of the time** – down slightly from 52% last year, owing to a decrease in the time spent using 'pay-per-use' individual download type services; and
- **unlawful sources an average of 40% of the time** – a significant increase from last year (34%), at least in part due to the inclusion of a new category this year that enabled respondents to indicate if they pay a small fee to access subscription services through a shared or unknown account (9%). In previous surveys, this behaviour may have been captured within the neutral 'other' category, though it is also possible that some respondents may have previously indicated they 'saved offline' using paid subscription services to describe this behaviour. For the remaining unlawful ways of downloading music, the proportion of time spent using these was largely in line with previous years, though a slow downward trend in their use can be seen since 2020.

Figure 17: Average proportion of time spent downloading music, by source[11]

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

Source	2020 (n=445)	2021 (n=317)	2022 (n=401)
Lawful sources	**51%**	**52%**	**48%**
Saving offline via a paid for subscription service (e.g. Spotify Premium)	35%	35%	39%
Pay-per-view / paying a single fee to download individual songs or albums through services	16%	16%	9%
Unlawful sources	**38%**	**34%**	**40%**
Using an online converter (e.g. Y2mate, YTMP3) or 'stream ripping' software	17%	14%	15%
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	9%
Receiving the file(s) directly from someone else (e.g. Dropbox, Google Drive, USB stick, etc.)	6%	5%	4%
Receiving a link to download music made available by someone else (e.g. via forums)	6%	4%	4%
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent)	5%	6%	4%
A file hosting website or cyberlocker (e.g. MediaFire, Mega, ZippyShare, etc.)	4%	4%	3%
Other sources	**12%**	**15%**	**12%**
Download for free from the internet, without really being sure where it comes from	9%	14%	10%
Other	3%	0%	2%

Q15. How is the way that you download music typically split across the following? (Enter percentage of time for each option). 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.[12]

As shown in Table 7, music downloading behaviours varied somewhat by age, gender and employment status.

The average reported proportion of time spent using **unlawful sources** to download music did not differ dramatically across age groups in 2022, being between 36% and 51% for all age groups other than the 45-54 age group (only 22% this year). In previous years this has tended to be higher in younger age groups, but less so in the 2022 survey.

Consistent with previous years, the average proportion of time spent using unlawful sources to download music was somewhat higher among **males** (43%, compared to 36% for females).

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

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

The average proportion of time spent using **unlawful sources** to download music again did not vary substantially by household income, ranging from 36% to 44%.

The average proportion of time spent using **unlawful sources** to download music by employment status did not reveal any significant patterns given the small sample sizes available for many categories.

Table 7: Average proportion of time spent downloading music, by age, gender, household income and employment status, 2022

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=	401	238	163	160	78	70	51	28*	14*	70	119	162	144	69	27*	24*	14*	80	27*	12*	15*
Lawful	**48%**	**45%**	**53%**	**47%**	**57%**	**52%**	**65%**	**24%**	**27%**	**48%**	**44%**	**52%**	**56%**	**50%**	**54%**	**39%**	**61%**	**40%**	**35%**	**61%**	**28%**
'Saving offline' via a paid for subscription service	39%	35%	44%	41%	50%	38%	43%	19%	20%	39%	34%	42%	45%	41%	54%	30%	54%	33%	25%	40%	5%
'Pay-per-view' / paying a single fee to download individual songs/albums	9%	10%	9%	6%	7%	14%	23%	5%	7%	8%	10%	10%	11%	9%	<1%	9%	7%	7%	10%	21%	23%
Unlawful	**40%**	**43%**	**36%**	**43%**	**39%**	**44%**	**22%**	**36%**	**51%**	**36%**	**44%**	**43%**	**38%**	**35%**	**34%**	**54%**	**35%**	**44%**	**52%**	**31%**	**26%**
Downloading music using an online converter or 'stream ripping' software, app or browser extension	15%	18%	11%	13%	10%	17%	9%	23%	32%	16%	13%	18%	13%	10%	14%	36%	5%	13%	20%	4%	9%
Paying a small fee to access one or many subscription services through a shared / unknown account	9%	10%	9%	14%	14%	8%	3%	3%	0%	9%	8%	10%	10%	8%	9%	5%	0%	15%	14%	13%	0%
Receiving the file(s) directly from someone else	4%	3%	6%	4%	4%	4%	4%	4%	9%	2%	7%	4%	5%	4%	1%	6%	2%	4%	2%	0%	9%
Receiving a link to download file(s) made available by someone else	4%	3%	5%	6%	3%	4%	4%	2%	<1%	5%	4%	3%	2%	5%	5%	4%	25%	5%	6%	1%	0%
BitTorrent / file-sharing or peer to peer service	4%	5%	2%	3%	2%	7%	<1%	5%	5%	2%	7%	3%	4%	4%	1%	1%	1%	3%	3%	11%	9%
A file hosting website or cyberlocker	3%	4%	3%	4%	5%	3%	1%	0%	5%	2%	4%	4%	3%	4%	4%	<1%	1%	4%	7%	1%	0%
Other	**12%**	**12%**	**11%**	**10%**	**4%**	**5%**	**13%**	**40%**	**22%**	**16%**	**12%**	**5%**	**6%**	**15%**	**11%**	**7%**	**4%**	**15%**	**13%**	**8%**	**46%**
Download for free from the internet, without really being sure where it comes from	10%	11%	9%	9%	4%	5%	8%	35%	16%	12%	12%	5%	5%	15%	11%	2%	4%	14%	13%	8%	29%
Other	2%	2%	2%	1%	0%	0%	4%	4%	5%	4%	0%	1%	1%	0%	0%	6%	0%	1%	0%	0%	17%

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 categories 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.

Profile of music infringers

Overall (across both downloading and streaming / accessing), 74% of those who consumed music online did so lawfully (non-infringers).

26% consumed music in at least some **unlawful** ways (infringers) – 19% through a combination of lawful and unlawful sources, and 7% via unlawful sources only.

Table 8 illustrates several demographic and behavioural differences between the two groups of music consumers (infringers and non-infringers). These differences have remained consistent over the past 3 years.

Table 8: Profile of music infringers versus non-infringers

74% Non-infringers (all activities lawful) Base: Respondents who consumed music online lawfully only (n=859)	26% Infringers (some or all activities unlawful) Base: Respondents who consumed music online unlawfully (n=307)
Compared to infringers, non-infringers were more likely to be:	Compared to non-infringers, infringers were more likely to be:
Female (50%) *(34%)^*	Male (66%) *(50%)^*
Aged 35 years and over (53%) *(41%)*	Aged 12 to 24 years (40%) *(22%)*
Household income* <$40,000 (23%) *(17%)*	Household income* >$40,000 (83%) *(77%)*
Retired (8%) *(4%)*	Student (23%) *(14%)*
And were more likely to report:	And were more likely to report:
Streaming / accessing music online (93%) *(66%)*	Downloading (76%) *(16%)* and sharing (25%) *(4%)* music online
	Unlawfully consuming movies / films (67%), TV programs (59%), sports (51%) and video games (46%) online

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

^Results in coloured italics and brackets indicate the infringer (red) or non-infringer (blue) result for comparison.

VI. Movies

Movies / Film

Content consumption summary (2022)

57% (+4%) of all respondents **consumed** movie / film content online in 2022

74% (-3%) of movie / film consumers accessed all movie / film content ONLY **lawfully**

26% (+3%) of movie / film consumers accessed at least some movie / film content **unlawfully**

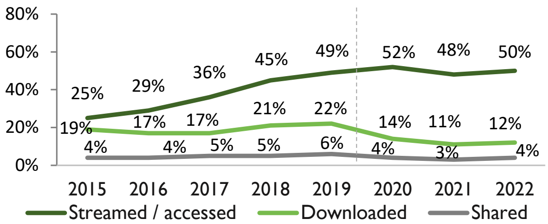
How is movie / film content consumed through the internet?

In the past 3 months:

50% **streamed / accessed** movies / films online

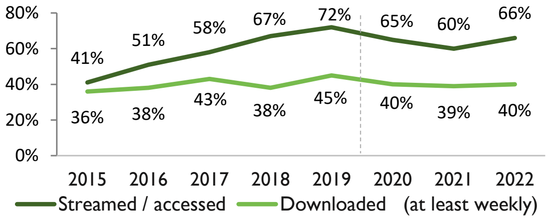
12% **downloaded** movies / films online

4% **shared** movies / films online



66% of those who **streamed / accessed** movies / films online did so **at least weekly**

40% of those who **downloaded** movies / films online did so **at least weekly**



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

In 2022, the top three ways to **stream** movie / film content online were:

1. A paid subscription to an online video streaming service – 84%
2. Watching movies / films online via TV Catch-up services – 28%
3. A free version of a streaming / download service that has a paid premium tier – 22%

In 2022, the top three ways to **download** movie / film content online were:

1. Saving offline via a paid for subscription service – 58%
2. Pay-per-view / paying a single fee to download individual movies or films through services – 26%
3. 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* – 23%

In 2022, the top three sites or services to **consume** movie / film content online were:

71% (-1%) Netflix

37% (+17%) Disney+

34% (+11%) Amazon Prime Video

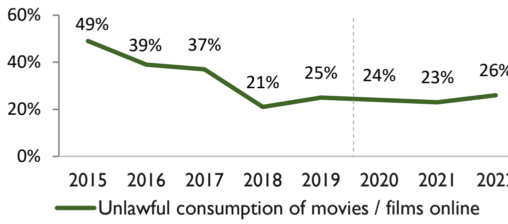
How much movie / film content consumption online was at least partly unlawful?

20% of those who **streamed / accessed** movies / films online did so unlawfully

8% of average time spent **streaming / accessing** movies / films was unlawful

58% of those who **downloaded** movies / films online did so unlawfully

37% of average time spent **downloading** movies / films was unlawful



Characteristics of Infringers

- Male (66%)
- Aged 12 to 24 years (37%)
- Students (20%)

Behaviours of Infringers

- Download (47%) and share (10%) movies / films online
- Use all sites / services to consume movies / films online (except Netflix and Stan)
- Unlawfully consume music (57%), TV programs (63%), sports (53%) and video games (48%) online

NOTE: Caution should be used when comparing 2020-22 results to previous years due to methodology changes (indicated by vertical dotted line in charts). Numbers in brackets present the change in the result compared to the previous year.
* Denotes methods of streaming or downloading movies / films where at least some of this is potentially unlawful.

Chapter overview

This chapter presents the findings in relation to movie or film consumption online. More than half of respondents had engaged with movies or films online in the past 3 months, most commonly through Netflix and other streaming services, and YouTube. Overall engagement with movies or films online was up somewhat compared to 2021. Streaming and downloading via a paid subscription service were the dominant methods used.

As in 2020 and 2021, around three-quarters of respondents consumed movies or films online lawfully (74%, non-infringers). The remaining quarter consumed at least some movies or films unlawfully (infringers), though most also used lawful services to download or stream movies. Respondents who downloaded movies or films were more likely to access this content unlawfully, primarily via BitTorrent or a similar file sharing or peer to peer service, or by paying a small fee to access subscription services through a shared or unknown account to downloaded content for offline viewing.

See page 5 for information about important modifications to the survey methodology. These changes may impact on lawful and unlawful consumption results in this section. The changes were made to make the survey more sensitive overall to some emerging methods of unlawful consumption.

Consumption behaviours

57% of respondents had **engaged with movies or films online in the past 3 months** (downloaded, streamed or shared) [13].

Incidence of movie consumption online increased somewhat since last year (53%), but did not quite reach the 2020 level of 59%. There was little change year-on-year in the manner in which people accessed movie content online – 50% streamed (48% in 2021, and 52% in 2020), 12% downloaded (11% in 2021, and 14% in 2020), and 4% shared movie content online (3% in 2021, and 4% in 2020).

50% of all respondent streamed movies, or 88% of movie consumers

12% of all respondents downloaded movies, or 21% of movie consumers

[13] Q12. In the past 3 months, which of the following have you streamed / accessed, downloaded, or shared / uploaded through the internet? (n=2,400).

As shown in Table 9, streaming via paid subscription services continued to be the most common way respondents accessed movie / film content online, with around three quarters of respondents indicating they used this method. All other methods of consumption had a much lower incidence, reported by fewer than a quarter of respondents who had streamed or downloaded movies in the past three months.

Overall, use of pay-per-view and pay-per-download services appeared to be on the decline, as was online viewing of Pay TV services, saving offline via subscription services, stream ripping, and file sharing in its many forms. Reports of accessing movies via social media markedly declined this year, though these were most likely due to changes to the survey[14].

Table 9: Ways used to consume (download or stream) movies online in the past 3 months

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

Method	2020 (n=1,458)	2021 (n=1,292)	2022 (n=,1,412)
LAWFUL			
Streaming via a paid for subscription service	73%	77%	75%
Accessing content using your internet browser via live 'free-to-air' or catch-up services	33%	36%	25%
NEW A free version / tier of a video streaming service	Not asked	Not asked	20%
A subscription to a Pay TV service that allows you to watch online	21%	21%	17%
'Saving offline' via a paid for subscription service	17%	15%	12%
'Pay-per-view' / paying a single fee to rent / access individual movies or films through services	13%	12%	8%
Social media services	30%	27%	7%
Paying a single fee to download individual movies through services	10%	9%	6%
UNLAWFUL			
NEW Paying a small fee to access one or many subscription services through a shared / unknown account (e.g. shared login credentials)	Not asked	Not asked	10%
Through other apps / services that you do not have a paid subscription to that can be accessed through app marketplaces	Not asked	8%	9%
NEW Through websites that you do not have to pay to access, which allow you to stream full-length movies for free	Not asked	Not asked	7%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box	6%	6%	5%
BitTorrent or another file-sharing or peer to peer service	10%	9%	5%
Receiving a link to download / stream movies made available by someone else	13%	11%	4%
A file hosting website or cyberlocker	10%	8%	3%
Downloading video content from sites such as YouTube using an online converter or 'stream ripping' software, app or browser extension	10%	8%	3%
Receiving the file(s) directly from someone else	8%	7%	2%
OTHER			
Downloading or streaming for free from the internet, without really being sure where it comes from	18%	17%	8%
Other	1%	1%	1%

Q22 Which of the following ways have you used to download / stream movies / films in the past 3 months? (Multiple response). Note: Figures for 2020 and 2021 are calculated using 'Q25. Compared to this time last year, how often are you using this method to download / stream movies online?'. Caution is advised when comparing results between 2022 and prior years.

[14] Specifically, YouTube was removed from the examples provided alongside the social media option this year, and was moved instead to the streaming services categories (free and paid) given how the platform now operates.

While Netflix remains comfortably the most common service used to stream or download movies or films, there has been considerable change in the next most commonly used services. Disney+ has increased from 13% in 2020 to 37% in 2022, while Amazon Prime video has increased from 17% to 34% during the same time, and Stan from 17% to 24%. In the same timeframe, reported usage of YouTube services has reduced somewhat, though it still remains in the top 5.

Figure 18: Top 10 services used to download, stream / access or share movies or films

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

Service	2020 (n=1,462)	2021 (n=1,297)	2022 (n=,1,351)
Netflix	70%	72%	71%
Disney+	13%	20%	37%
Amazon Prime Video	17%	23%	34%
All YouTube versions combined	37%	31%	30%
YouTube / YouTube kids	35%	29%	25%
Stan	17%	19%	24%
7plus	14%	13%	18%
9Now	12%	14%	16%
ABC iView	16%	15%	16%
SBS on Demand	17%	17%	16%
Foxtel Now	13%	10%	14%

Q24A/B/C/D/E/F/G. Which of the following [access category] services have you used to access movies / films online in the past 3 months? (Results aggregate several multiple response questions). Note: Prior to 2022, this question was asked as a single multiple response question. The question was broken up into several questions in 2022 when the service list became too long for respondents to easily and accurately respond to. Due to this change, comparisons of results between these periods should be made with caution.

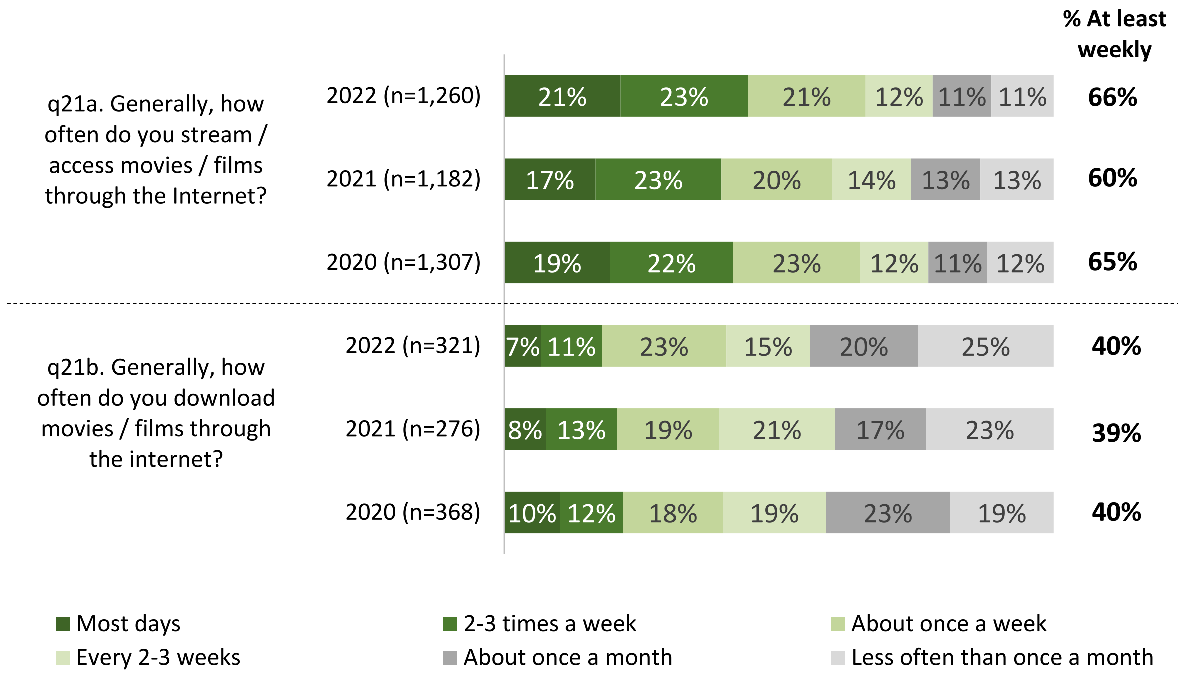
Frequency of consumption

As illustrated in Figure 19 overleaf, 66% of those who streamed / accessed movies or films online did so at least weekly (equivalent to 33% of all respondents). This was equivalent to 2020 levels (65%), and slightly up from 60% in 2021.

Movies or films were downloaded much less frequently, though still consistent with 2020 and 2021 figures, with 40% of downloaders reporting that they downloaded movies or films at least weekly (5% of all respondents).

Figure 19: Frequency of movie or film consumption

Base: Respondents who had downloaded or streamed / accessed movies or 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 10 overleaf, the amount and frequency of movie or film consumption varied somewhat by age, gender, household income and employment status.

As in 2021, respondents **aged between 12 and 24** reported the highest overall consumption of movies or films online, with this proportion declining with age. While this cohort again reported the highest downloading frequency, streaming was again most frequent among those aged 25-34.

Overall consumption of movies or films online was also still higher among **males**, who were more likely than females to indicate they both stream and download movies or films online.

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

By employment status, consumption of movies or films online was highest amongst **students**, who have similar patterns to the 12-24 year old cohort.

Table 10: Consumption of movies or films online, by age, gender, household income and employment status, 2022

Base: All respondents, and respondents who had downloaded or streamed / accessed movies or 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=	1,443	779	661	393	299	296	219	141	95	265	385	627	525	218	85	79	73	220	94	46	117
Consume movies / films online	**57%**	**62%**	**51%**	**73%**	**71%**	**68%**	**54%**	**41%**	**32%**	**45%**	**55%**	**67%**	**67%**	**60%**	**59%**	**56%**	**57%**	**77%**	**65%**	**40%**	**30%**
Stream / access movies / films	**50%**	**53%**	**47%**	**58%**	**64%**	**60%**	**50%**	**38%**	**28%**	**40%**	**48%**	**60%**	**60%**	**53%**	**53%**	**54%**	**52%**	**62%**	**54%**	**37%**	**27%**
Download movies / films	**12%**	**15%**	**9%**	**22%**	**14%**	**16%**	**7%**	**6%**	**5%**	**9%**	**12%**	**14%**	**14%**	**15%**	**12%**	**7%**	**8%**	**22%**	**18%**	**7%**	**4%**
Streamed n=	1,260	652	606	316	263	261	202	133	85	230	331	554	462	191	76	75	66	182	75	42	106
2-3 times a week or more often	44%	46%	44%	43%	44%	47%	46%	49%	35%	56%	45%	42%	46%	39%	49%	35%	40%	39%	63%	52%	46%
About once every 1-3 weeks	34%	36%	32%	40%	35%	32%	33%	28%	29%	24%	31%	39%	37%	39%	31%	28%	30%	43%	20%	18%	25%
About once a month or less often	22%	19%	24%	17%	21%	21%	22%	23%	36%	20%	24%	20%	17%	22%	21%	37%	29%	18%	18%	30%	29%
Downloaded n=	321	199	121	126	66	70	30	15*	14*	60	87	134	116	49	19*	11*	11*	69	29	9	168
2-3 times a week or more often	18%	20%	14%	23%	8%	14%	7%	41%	21%	17%	28%	13%	13%	29%	10%	9%	18%	24%	6%	*	21%
About once every 1-3 weeks	38%	45%	28%	43%	44%	32%	31%	22%	35%	31%	29%	46%	39%	39%	26%	28%	30%	41%	41%	*	30%
About once a month or less often	44%	35%	58%	34%	48%	53%	63%	37%	45%	52%	43%	42%	48%	32%	63%	63%	52%	35%	52%	*	49%

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 categories 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 or films

Overwhelmingly, using paid for subscription services was reported as the primary way of streaming movie content online by respondents (84%, see Figure 20). The next most commonly reported way of streaming movies was via catch-up TV services, cited by just over a quarter of movie streamers.

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 movie or film content.[15]

80% of respondents who streamed movies or films **only did so lawfully** (down slightly from 84% last year and 86% in 2020). A small proportion (17%, similar to 15% last year and 13% in 2020) used a mix of lawful and unlawful sources to stream movies or films online, while just 3% of respondents used only unlawful sources (up from 1% in both 2021 and 2020).

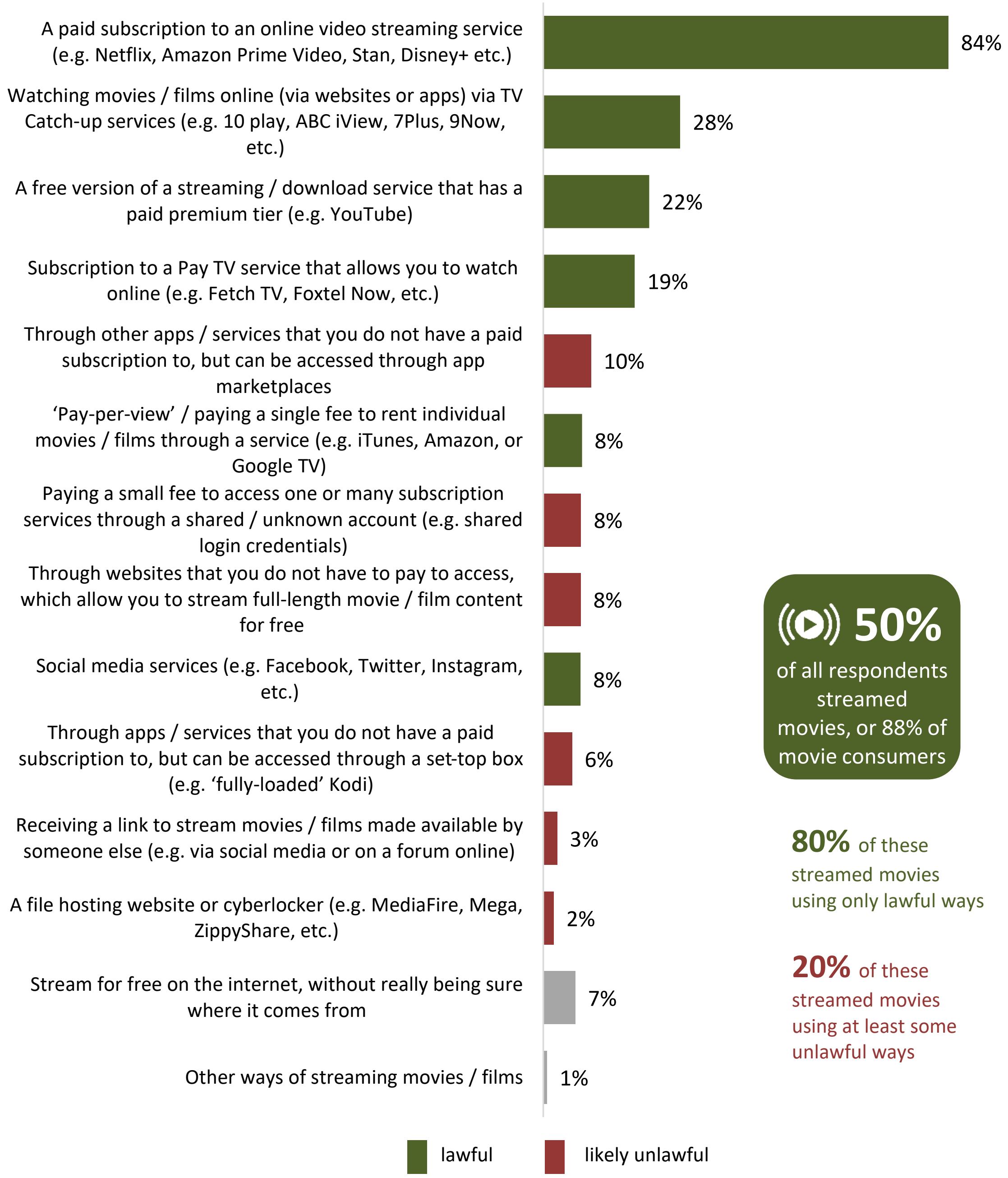
Respondents were also asked to estimate the amount of time they spent streaming movies using each of the sources they indicated using. As shown in Figure 21, those who streamed movies online spent the majority of their time doing so lawfully. Specifically, they reported using:

- **lawful sources an average of 89% of the time** – slightly lower than 92% in 2021 and 93% in 2020. This was strongly driven by paid online subscription services (67%, up from 59% in 2020).
- **unlawful sources an average of 8% of the time** – somewhat higher than in the past two years (4%), likely owing to the addition of three new categories in the 2022 survey.

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

Figure 20: Typical ways of consuming movies or films online – streaming

Base: Respondents who streamed / accessed movies in the past 3 months (n=1,260)



Q22b. Which of the following ways have you used to stream movies in the past three months? (Multiple response)

Figure 21: Average proportion of time spent streaming movies or films, by source[16]

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

Source	2020 (n=1,307)	2021 (n=1,183)	2022 (n=1,260)
Lawful sources	**93%**	**92%**	**89%**
A paid subscription to an online video streaming service (e.g. Netflix, Stan, etc.)*	59%	63%	67%
Watching movies / films online (via websites or apps) via TV Catch-up services	11%	10%	7%
Subscription to a Pay TV service that allows you to watch online (e.g. Fetch TV)	9%	8%	7%
NEW A free version of a streaming / download service that has a paid premium tier*	Not asked	Not asked	6%
Social media services (e.g. Facebook, Twitter, Instagram, etc.)*	11%	8%	1%
'Pay-per-view' / paying a single fee to rent individual movies through services	3%	2%	1%
Unlawful sources	**4%**	**4%**	**8%**
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	2%
Through other apps / services that you do not have a paid subscription to, but can be accessed through app marketplaces	Not asked	1%	2%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box (e.g. 'fully-loaded' Kodi)	1%	1%	2%
NEW Through websites that you do not have to pay to access, which allow you to stream full-length movie content for free	Not asked	Not asked	1%
Receiving a link to stream movies / films made available by someone else	2%	1%	0%
A file hosting website or cyberlocker (e.g. MediaFire, Mega, ZippyShare, etc.)	1%	1%	0%
Other sources	**3%**	**4%**	**3%**
Stream for free from the internet, without really being sure where it comes from	2%	4%	2%
Other	0%	0%	1%

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

* Note: In 2022, the YouTube example was reallocated to streaming services to better reflect its function it the marketplace. Prior to 2022, YouTube was included as an example under the social media category.

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

Movie or film streaming behaviours varied somewhat by age in 2021, but there were not substantial differences by other demographics (see Table 11). This was different in 2022, where similar variations were seen across several demographic groups.

The vast majority of respondents across all age groups streamed movies or films lawfully, but compared to older age groups, respondents aged **12 to 24** were slightly more likely to report using **unlawful** sources to stream movies or films (14% of their time), while usage of TV catch-up services again generally increased with age.

The average proportion of time spent using lawful and unlawful services to stream movies or films varied more substantially by gender in 2022, with males estimating 11% unlawful usage, compared to 5% for females.

Proportional usage of lawful and unlawful sources to stream movies or films online was fundamentally similar across all household income levels.

The average estimated proportion of time streaming movies or films unlawfully was highest for respondents who were self-employed (15%), employed full-time (11%) or students (11%).

Table 11: Average proportion of time spent streaming movies or films, by age, gender, household income and employment status, 2022

Base: Respondents who had streamed / accessed movies or 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=	1,260	652	606	316	263	261	202	133	85	230	331	554	462	191	76	75	66	182	75	42	106
Lawful	**89%**	**87%**	**92%**	**83%**	**91%**	**89%**	**94%**	**94%**	**89%**	**88%**	**93%**	**88%**	**87%**	**92%**	**90%**	**84%**	**97%**	**86%**	**95%**	**87%**	**93%**
Paid subscription to an online video streaming service	67%	65%	69%	61%	72%	69%	72%	65%	62%	64%	70%	66%	68%	68%	70%	58%	73%	62%	70%	67%	65%
Watching movies / films online via TV Catch-up services	7%	6%	9%	5%	6%	6%	9%	9%	11%	10%	7%	6%	6%	9%	7%	8%	8%	5%	11%	4%	11%
Subscription to a Pay TV service that allows you to watch online	7%	7%	6%	7%	5%	5%	6%	12%	8%	6%	7%	7%	6%	7%	4%	9%	7%	6%	4%	8%	10%
A free version of a service that has a paid premium tier	6%	7%	6%	7%	6%	7%	5%	7%	6%	6%	7%	5%	5%	6%	8%	8%	6%	10%	5%	8%	5%
Social media services	1%	1%	1%	2%	2%	2%	<1%	<1%	<1%	1%	1%	1%	1%	1%	1%	<1%	2%	2%	2%	1%	<1%
‘Pay-per-view’ / paying a single fee to rent individual movies / films through a service	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	<1%	1%	1%	1%	2%	<1%	1%
Unlawful	**8%**	**11%**	**5%**	**14%**	**9%**	**8%**	**4%**	**2%**	**8%**	**8%**	**6%**	**10%**	**11%**	**6%**	**5%**	**15%**	**2%**	**11%**	**5%**	**6%**	**3%**
Paying a small fee to access subscription services through a shared / unknown account	2%	3%	1%	5%	2%	2%	1%	<1%	0%	4%	2%	3%	4%	2%	2%	<1%	<1%	5%	2%	<1%	0%
Through other apps / services that you do not have a paid subscription to, but can be accessed through app marketplaces	2%	3%	1%	3%	1%	2%	1%	1%	7%	2%	1%	3%	2%	1%	1%	10%	1%	2%	2%	3%	2%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box	2%	3%	1%	3%	2%	2%	1%	<1%	<1%	1%	1%	2%	3%	1%	<1%	2%	0%	1%	0%	<1%	<1%
Through websites which allow you to stream full-length movie content for free	1%	1%	1%	2%	2%	1%	1%	<1%	<1%	2%	1%	1%	1%	1%	<1%	2%	<1%	2%	1%	3%	<1%
Receiving a link to stream movies / films made available by someone else	<1%	1%	<1%	1%	<1%	<1%	<1%	1%	<1%	<1%	<1%	<1%	<1%	1%	<1%	<1%	0%	1%	0%	<1%	<1%
A file hosting website or cyberlocker	<1%	<1%	<1%	<1%	<1%	<1%	0%	0%	0%	<1%	<1%	1%	<1%	<1%	1%	0%	0%	<1%	0%	0%	0%
Other	**3%**	**2%**	**3%**	**3%**	**1%**	**3%**	**2%**	**4%**	**3%**	**4%**	**2%**	**2%**	**2%**	**2%**	**5%**	**1%**	**1%**	**3%**	**<1%**	**7%**	**5%**
Stream for free from the internet, without really being sure where it comes from	2%	2%	2%	3%	1%	2%	1%	2%	1%	3%	1%	2%	2%	2%	4%	1%	1%	3%	<1%	5%	2%
Other	1%	<1%	1%	0%	0%	<1%	1%	1%	3%	1%	<1%	1%	<1%	1%	1%	<1%	0%	0%	0%	2%	3%

Q24. How is the way you stream movies / films 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 categories 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.

Sources of downloading movies or films

Respondents were also asked to nominate the sources they typically used to download movies or films online, which were then categorised as likely to be lawful, or potentially unlawful ways of consuming content.

42% used **only lawful** sources to download movies or films online (up from 30% last year, and 31% in 2020).

31% used a **mix of lawful and unlawful** sources to download movies or films online (down from 51% last year, and 48% in 2020). This decrease was driven by a slight decline in stream ripping, and file sharing behaviours (including via BitTorrent, cyberlockers, receiving files from others either directly or through links shared indirectly).

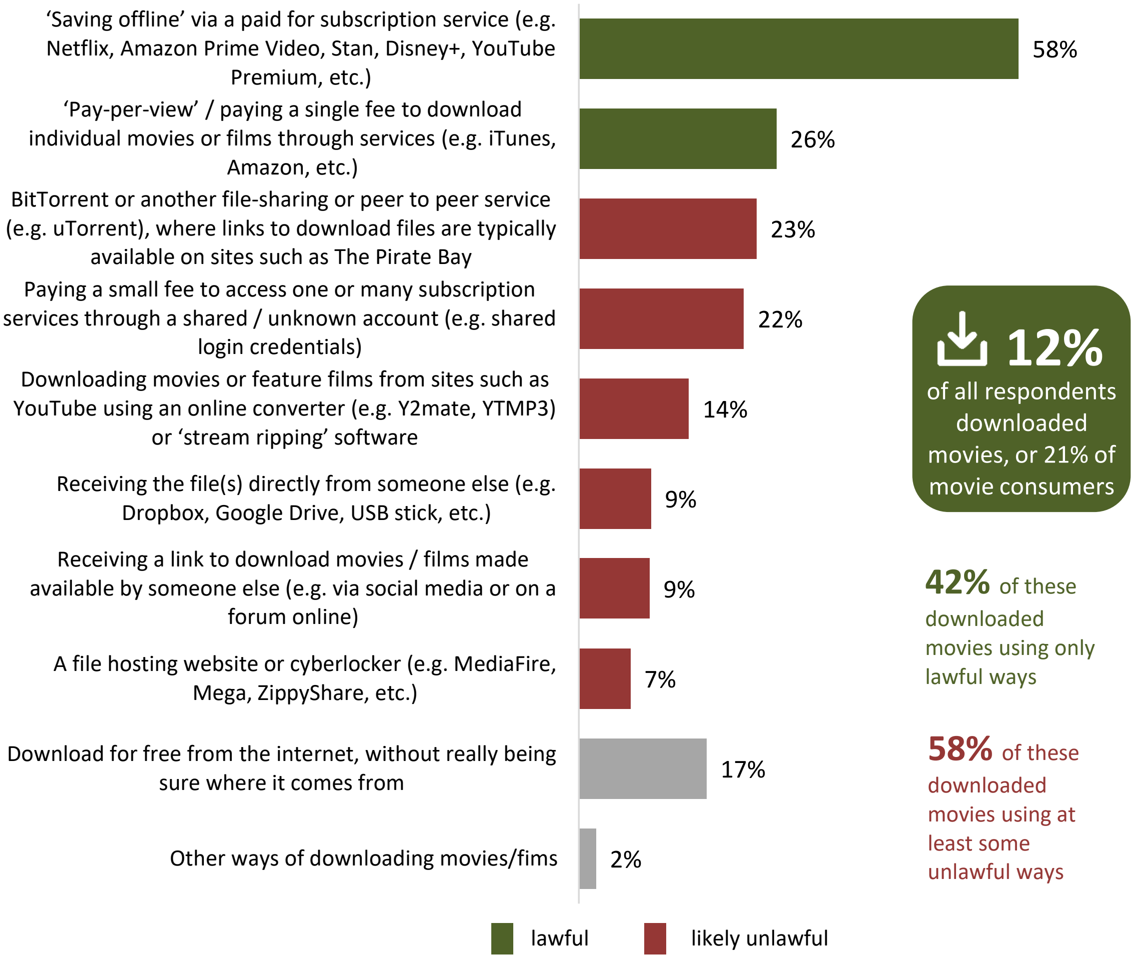
27% used **only unlawful** sources to download movies or films online (up from 18% last year, and 20% in 2020).

These changes may in some ways be explained by the improvements made to the survey this year, with the additional category of paying a small fee to access subscription services through a shared / unknown account being included in the unlawful category. This additional category may have made it easier for some users to accurately categorise their usage. Similar prevalence of this new category was noted among those who used a mix of lawful and unlawful methods to download movies, and those who only used unlawful methods.

As illustrated in Figure 22, of those who downloaded movies or films, 58% saved offline via a paid subscription service, by far the most common method. A variety of secondary methods were also used, with sources that are likely to be unlawful being more prevalent among those who download movies compared to those who stream this content.

Figure 22: Typical ways of consuming movies or films online – downloading

Base: Respondents who downloaded movies in the past 3 months (n=321)



Q22a. Which of the following ways have you used to download movies / films in the past three months? (Multiple response)

Respondents were then asked to indicate the proportion of the time they spent using each source when downloading movies or films. As illustrated in Figure 23, **usage was similar to that in 2020 and 2021**, with respondents reportedly using:

- **lawful sources an average of 52% of the time** – compared to 49% in 2021; and
- **unlawful sources an average of 37% of the time** – as in 2021. The most commonly used unlawful sources were BitTorrent or another file-sharing or peer to peer service (14%), or by paying a small fee to access subscription services through a shared / unknown account (12%). It is worth noting that the proportion of time spent downloading via unlawful sources remained unchanged predominantly due to the addition of this new paid login credentials category, the use of which offset cumulative incremental declines in the use of other file sharing methods.

Figure 23: Average proportion of time spent downloading movies or films, by source[17]

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

Source	2020 (n=366)	2021 (n=275)	2022 (n=321)
Lawful sources	**52%**	**49%**	**52%**
'Saving offline' via a paid for subscription service (e.g. Netflix, Amazon Prime Video etc.)	40%	40%	41%
'Pay-per-view' / paying a single fee to download individual movies through services	12%	9%	11%
Unlawful sources	**40%**	**37%**	**37%**
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent)	16%	15%	14%
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	12%
Using an online converter (e.g. Y2mate, YTMP3) or 'stream ripping' software	9%	8%	5%
A file hosting website or cyberlocker (e.g. MediaFire, Mega, ZippyShare, etc.)	5%	4%	3%
Receiving a link to download movies / films made available by someone else	5%	5%	3%
Receiving the file(s) directly from someone else (e.g. Dropbox, Google Drive, USB stick, etc.)	5%	6%	2%
Other sources	**8%**	**14%**	**10%**
Download for free from the internet, without really being sure where it comes from	7%	11%	8%
Other	1%	2%	2%

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

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

As shown in Table 12, movie or film downloading behaviours varied somewhat by age, household income and employment status.

The average proportion of time spent downloading movies or films **unlawfully** was highest among those **aged between 35 and 44** (on average 44% of the time), and lowest among those aged 55 and over. These patterns are as seen in 2021.

Males reported a much higher average proportion of time spent using **unlawful sources** to download movies or films in 2022 (44% compared to 28%), a difference that was not seen in 2021.

Those with a household income of **over $80,000** reported a higher average proportion of time downloading movies or film from **lawful** sources.

Sample sizes are very small by employment category, and no meaningful differences can be observed.

Table 12: Average proportion of time spent downloading movies or films, by age, gender, household income and employment status, 2022

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=	321	199	121	126	66	70	30	15*	14*	60	87	134	116	49	19*	11*	11*	69	29*	9*	16*
Lawful	**52%**	**46%**	**62%**	**52%**	**57%**	**47%**	**52%**	**49%**	**62%**	**46%**	**50%**	**53%**	**57%**	**55%**	**59%**	**26%**	**72%**	**51%**	**43%**	*	**52%**
'Saving offline' via a paid for subscription service	41%	36%	50%	42%	45%	34%	39%	45%	50%	38%	39%	42%	46%	41%	56%	13%	54%	38%	32%	*	44%
'Pay-per-view' / paying a single fee to download individual movies	11%	10%	13%	10%	12%	13%	12%	4%	12%	8%	11%	12%	11%	14%	3%	13%	18%	12%	11%	*	8%
Unlawful	**37%**	**44%**	**28%**	**41%**	**37%**	**44%**	**31%**	**20%**	**29%**	**42%**	**37%**	**42%**	**35%**	**34%**	**29%**	**64%**	**13%**	**42%**	**52%**	*	**34%**
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent)	14%	17%	7%	8%	13%	22%	9%	14%	22%	21%	14%	13%	13%	11%	3%	15%	1%	6%	26%	*	32%
Paying a small fee to access subscription services through a shared / unknown account	12%	13%	9%	18%	12%	9%	9%	0%	0%	10%	7%	16%	11%	10%	17%	21%	0%	22%	12%	*	0%
Using an online converter (e.g. Y2mate, YTMP3) or 'stream ripping' software, app or browser extension	5%	5%	6%	5%	5%	8%	9%	0%	0%	7%	7%	5%	5%	4%	4%	20%	7%	7%	3%	*	2%
A file hosting website or cyberlocker	3%	3%	2%	2%	3%	1%	3%	5%	6%	1%	3%	3%	4%	1%	2%	0%	0%	1%	7%	*	0%
Receiving a link to download movies / films made available by someone else	3%	3%	1%	5%	2%	1%	0%	1%	0%	1%	4%	2%	1%	7%	2%	5%	<1%	4%	1%	*	0%
Receiving the file(s) directly from someone else	2%	2%	2%	2%	1%	3%	<1%	0%	0%	2%	2%	2%	2%	1%	1%	3%	5%	2%	4%	*	0%
Other	**10%**	**10%**	**10%**	**8%**	**6%**	**9%**	**17%**	**32%**	**9%**	**12%**	**13%**	**5%**	**8%**	**11%**	**12%**	**11%**	**14%**	**8%**	**4%**	*	**14%**
Download for free from the internet, without really being sure where it comes from	8%	10%	7%	7%	6%	9%	10%	22%	9%	10%	12%	5%	6%	9%	12%	11%	14%	6%	4%	*	9%
Other	2%	<1%	4%	1%	0%	<1%	7%	10%	0%	2%	1%	<1%	2%	2%	0%	0%	0%	1%	<1%	*	4%

Q23. How is the way that you download movies / films 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 categories 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 (*).

Profile of movie or film infringers

Of those who consumed movies or films online (both downloaded and streamed / accessed), 74% did so lawfully (non-infringers) (in line with 77% last year, and 76% in 2020).

26% of respondents consumed movies / films in at least some **unlawful** ways (infringers) (similar to 23% in 2021, and 24% in 2020) – 20% through a mix of lawful and unlawful sources (consistent with 21% last year and 20% in 2020), and 6% via unlawful sources only (up from 3% in 2021, and 4% in 2020).

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

Table 13: Profile of movie or film infringers versus non-infringers

74% Non-infringers (all activities lawful) Base: Respondents who consumed movies / films online lawfully only (n=1,005)	26% Infringers (some or all activities unlawful) Base: Respondents who consumed movies / films online unlawfully (n=369)
Compared to infringers, non-infringers were more likely to be:	Compared to non-infringers, infringers were more likely to be:
Female (51%) *(34%)*^	Male (66%) *(49%)*^
Aged 35 years and over (59%) *(40%)*	Aged 12 to 24 years (37%) *(19%)*
No substantial differences by household income	No substantial differences by household income
Retired (12%) *(5%)*	Student (20%) *(12%)*
And were more likely to report:	And were more likely to report:
Streaming / accessing movies / films online (96%) *(77%)*	Downloading (47%) *(11%)* and sharing (10%) *(2%)* movies / films online
Using Netflix (77%) *(54%)*	Using all sites / services except Netflix and Stan
	Unlawfully consuming other content: music (57%), TV programs (63%), sports (53%) and video games (48%)

*Excludes don't know and prefer not to say

^Results in coloured italics and brackets indicate the infringer (red) or non-infringer (green) result for comparison.

VII. TV Programs

TV programs

Content consumption summary (2022)

60% (+3%) of all respondents **consumed** TV program content online in 2022

78% (-2%) of TV program consumers accessed all TV content ONLY **lawfully**

22% (+2%) of TV program consumers accessed at least some TV content **unlawfully**

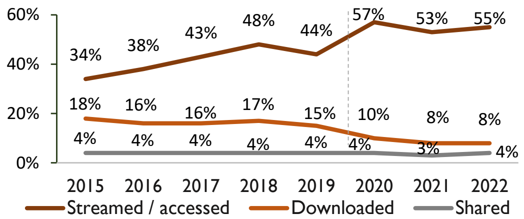
How is TV program content consumed through the internet?

In the past 3 months:

55% **streamed / accessed** TV programs online

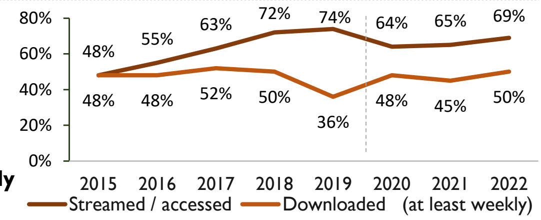
8% **downloaded** TV programs online

4% **shared** TV programs online



69% of those who **streamed / accessed** TV programs online did so **at least weekly**

50% of those who **downloaded** TV programs online did so **at least weekly**



Where are people going to consume TV program content online?

In 2022, the top three ways to **stream** TV content online were:

1. A paid subscription to an online video streaming service – 66%
2. Watching TV online either live or through catchup services – 39%
3. A free version of a streaming / download service that has a paid premium tier – 19%

In 2022, the top three ways to **download** TV content online were:

1. Saving offline via a paid for subscription service – 52%
2. BitTorrent or another file-sharing or peer to peer service where links to download files are typically available on site such as The Pirate Bay* – 24%
3. Pay-per-view / paying a single fee to download individual programs, episodes or series through services – 21%

In 2022, the top three sites or services to **consume** TV content online were:

58% (0%) Netflix

29% (0%) YouTube (all versions combined)

29% (+13%) Disney+

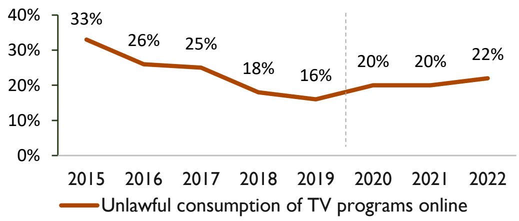
How much TV program content consumption online was at least partly unlawful?

17% of those who **streamed / accessed** TV online did so unlawfully

8% of average time spent **streaming / accessing** TV was unlawful

59% of those who **downloaded** TV online did so unlawfully

39% of average time spent **downloading** TV was unlawful



Characteristics of Infringers

- Male (63%)
- Aged 12 to 24 years (37%)
- Students (20%)

Behaviours of Infringers

- Download (34%) and share (11%) TV programs online
- Use many sites / services to consume TV programs online (except Netflix)
- Unlawfully consume music (61%), movies (75%), sports (58%) and video games (52%) online

NOTE: Caution should be used when comparing 2020-22 results to previous years due to methodology changes (indicated by vertical dotted line in charts). Numbers in brackets present the change in the result compared to the previous year.
* Denotes methods of streaming or downloading TV where at least some of this is potentially unlawful.

Chapter overview

This chapter presents the findings in relation to TV program consumption online. 60% of respondents had engaged with TV programs online in the past 3 months, most commonly through Netflix, but also through a broad combination of subscription and catch-up services. Engagement with TV programs online was still slightly lower than in 2020, but slightly higher than in the 2021 survey. Levels of streaming have been reasonably stable in the last three surveys and higher than seen before that period, but downloading remains at the lowest levels reported.

78% of respondents consumed TV programs lawfully (non-infringers), similar to the 80% seen in 2021. The remaining 22% consumed at least some TV programs through sources considered to be potentially unlawful (infringers). Few respondents consumed TV programs only in ways thought to be potentially unlawful. 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, or by paying a small fee to access subscription services through a shared / unknown account which also enable users to download content for offline viewing.

See page 5 for information about important modifications to the survey methodology. These changes may impact on lawful and unlawful consumption results in this section. The changes were made to make the survey more sensitive overall to some emerging methods of unlawful consumption.

Consumption behaviours

60%

of respondents had **engaged with TV programs online in the past 3 months** (downloaded, streamed or shared)[18], up slightly from last year (57%) and broadly in line with levels reported in 2020 (62%).

55% of respondents engaged with TV programs online through streaming (up from 53% in 2021, but still below the 57% reported in 2020). A smaller proportion of respondents engaged with TV programs online by downloading (8%, in line with 8% in 2021 and 10% in 2020) or by sharing (4%, similar to 3% in 2021, and 4% in 2020). The long-term trends for online engagement with TV programs suggest that streaming is reasonably steady at about the highest levels that have been seen, while downloading has been steadily declining and is at the lowest levels that have been seen.

55% of all respondents streamed TV programs, or 92% of TV consumers

8% of all respondents downloaded TV programs, or 13% of TV consumers

[18] Q12. In the past 3 months, which of the following have you streamed / accessed, downloaded, or shared / uploaded through the internet? (n=2,400).

As shown in Table 14, streaming via paid subscription services was again noted as the top way respondents stream TV content (62%), down slightly from previous years (68% in 2021, and 66% in 2020). Watching free-to-air content online or via catch-up services came in second, reported by 37% of those who stream TV content, down from 49% last year and 48% in 2020. In third place at 18% were free tiers / versions of paid subscriptions, a new category added in 2022.

Reports of accessing TV content via social media markedly declined this year, likely owing to changes to the survey relating to how YouTube has been described. In the past, YouTube has been provided as an example under the 'social media' option. This year, it has been included as an example under streaming services, better reflecting how it is currently experienced by users.

Table 14: Ways used to consume (download or stream) TV programs online in the past 3 months

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

Method	2020 (n=1,517)	2021 (n=1,384)	2022 (n=,1,466)
LAWFUL			
Streaming via a paid for subscription service*	66%	68%	62%
Accessing content using your internet browser via live 'free-to-air' or catch-up services	48%	49%	37%
NEW A free version / tier of a video streaming service*	Not asked	Not asked	18%
A subscription to a Pay TV service that allows you to watch online	22%	22%	16%
'Saving offline' via a paid for subscription service	11%	10%	7%
Social media services*	29%	26%	6%
'Pay-per-view' / paying a single fee to rent / access individual TV programs through services	10%	9%	4%
Paying a single fee to download individual TV programs through services	6%	5%	3%
UNLAWFUL			
Through other apps / services that you do not have a paid subscription to that can be accessed through app marketplaces	Not asked	8%	8%
NEW Paying a small fee to access one or many subscription services through a shared / unknown account (e.g. shared login credentials)	Not asked	Not asked	7%
NEW Through websites that you do not have to pay to access, which allow you to stream full-length TV programs for free	Not asked	Not asked	6%
BitTorrent or another file-sharing or peer to peer service	6%	6%	3%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box	7%	5%	3%
Receiving a link to download / stream TV programs made available by someone else	11%	9%	3%
A file hosting website or cyberlocker	8%	6%	2%
Downloading video content from sites such as YouTube using an online converter or 'stream ripping' software, app or browser extension	5%	4%	2%
Receiving the file(s) directly from someone else	5%	4%	1%
OTHER			
Downloading or streaming for free from the internet, without really being sure where it comes from	13%	13%	6%
Other	2%	1%	2%

Q29 Which of the following ways have you used to download/stream TV programs in the past 3 months? (Multiple response). Note: Figures for 2020 and 2021 are calculated using 'Q33. Compared to this time last year, how often are you using this method to download/stream TV programs?' Caution is advised when comparing results between 2022 and prior years. * Note: In 2022, the YouTube example was reallocated to streaming services to better reflect its function it the marketplace. Prior to 2022, YouTube was included as an example under the social media category.

As was the case for movie content, fewer respondents reported using lawful pay-per-view / download type services, watching Pay TV online, and saving offline via paid subscription services.

Fewer respondents also reported accessing TV content via file sharing of different types. Some of these shifts may be due to the survey changes in 2022, providing respondents with additional options that may better enable them to accurately express how they access TV content online.

Netflix remains the most common service to consume TV programs online (58%, see Figure 24), with this proportion steady over the past three surveys. The proportion using any YouTube service has remained at 29% in 2022. Use of catch-up TV services has increased a little across the last three years, but reported usage of other paid subscription services has increased more so. As a result, there are now a wide range of secondary sources which are now used by between 20%-30% of those respondents who consume TV programs online.

Figure 24: 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

Service	2020 (n=1,520)	2021 (n=1,387)	2022 (n=,1,395)
Netflix	57%	58%	58%
All YouTube versions combined	32%	29%	29%
Disney+	9%	16%	29%
Amazon Prime Video	13%	18%	28%
7plus	23%	22%	27%
9Now	18%	22%	25%
ABC iView	23%	23%	25%
YouTube / YouTube kids	30%	28%	25%
10 play	15%	15%	22%
SBS on Demand	22%	21%	21%
Stan	16%	17%	19%

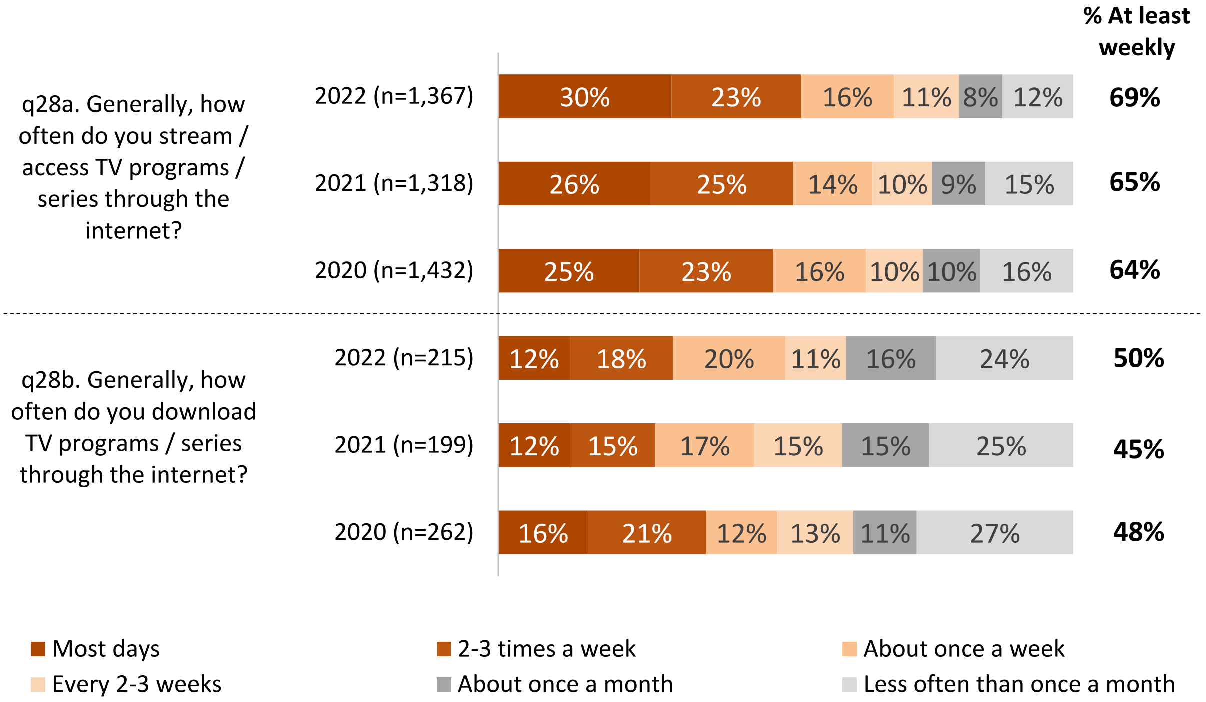
Q29A/B/C/D/E/F/G. Which of the following [access category] services have you used in to access TV programs online in the past 3 months? (Results aggregate several multiple response questions). Note: Prior to 2022, this question was asked as a single multiple response question. The question was broken up into several questions in 2022 when the service list became too long for respondents to easily and accurately respond to. Due to this change, comparisons of results between these periods should be made with caution.

Frequency of consumption

Amongst those who stream TV programs, there was a trend for slightly higher frequencies of doing so. 69% reported doing so at least weekly (up from 64% in 2020 – see Figure 25), amounting to 38% of all respondents. By comparison, among the smaller proportion of respondents who downloaded TV programs, there was no apparent change in the frequency with which they did this.

Figure 25: 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 15 below).

Those **aged between 12 and 44** reported the highest frequency of consuming TV programs online, and this generally declined with age – especially for those aged 55 and over. Downloading TV programs was particularly more common amongst younger respondents, while streaming was reasonably consistent from the 12-24 age group through to the 45-54 age group. While the youngest age groups were the most likely to consume TV programs online, they were not the most frequent consumers, with higher frequency consumption peaking in the 35-44 age group.

Unlike in 2021, **males** reported high consumption of TV programs online than females, overall and by both streaming or downloading.

Overall consumption of TV programs online was highest for those with a household income of **over $80,000**. These respondents were also most likely to report streaming TV programs online. This pattern is consistent with what was seen in 2021.

By employment status, **students** again reported the highest overall consumption of TV programs online, but in 2022 they were followed by those who were unemployed and looking for work. Like the 12-24 age group, while students were the most likely to consume TV programs online, they did so at a somewhat lower frequency compared to other employment categories.

Table 15: Consumption of TV programs online, by age, gender, household income and employment status, 2022

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=	1,502	789	711	377	291	291	245	167	131	278	411	642	519	230	93	82	76	207	101	56	158
Consume TV programs online	60%	64%	56%	70%	68%	66%	60%	48%	45%	48%	62%	69%	66%	63%	65%	59%	60%	73%	70%	48%	43%
Stream / access TV programs	55%	58%	52%	59%	63%	60%	59%	46%	42%	44%	57%	62%	59%	57%	64%	55%	57%	63%	66%	45%	41%
Download TV programs	8%	10%	6%	16%	9%	9%	4%	4%	5%	6%	8%	9%	9%	11%	6%	5%	4%	14%	8%	6%	5%
Streamed n=	1,367	697	668	316	267	264	238	161	121	255	372	581	467	207	91	75	72	177	94	53	148
2-3 times a week or more often	53%	52%	54%	46%	56%	61%	57%	47%	45%	57%	47%	59%	59%	54%	45%	63%	62%	42%	56%	71%	41%
About once every 1-3 weeks	28%	30%	24%	36%	28%	24%	24%	27%	24%	20%	32%	23%	25%	28%	40%	15%	17%	41%	26%	13%	25%
About once a month or less often	20%	18%	22%	18%	16%	15%	19%	26%	31%	22%	21%	17%	16%	19%	14%	22%	21%	17%	18%	16%	33%
Downloaded n=	215	133	82	88	39	39	19*	14*	16*	41	58	90	74	44	10*	9	5	43	12*	7	17*
2-3 times a week or more often	30%	32%	29%	28%	31%	36%	26%	29%	32%	25%	35%	33%	35%	24%	23%	*	*	27%	52%	*	30%
About once every 1-3 weeks	30%	34%	24%	38%	31%	16%	41%	15%	26%	32%	30%	30%	31%	39%	30%	*	*	33%	8%	*	24%
About once a month or less often	40%	35%	47%	34%	38%	48%	33%	56%	43%	43%	35%	36%	34%	36%	46%	*	*	40%	41%	*	46%

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 categories 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

Respondents were asked to indicate the ways in which they streamed TV content from a list of relevant options. Their selections were subsequently categorised as likely to be lawful or unlawful.

83%

of those who streamed TV content used **only lawful sources** to do so (similar to 86% last year, and 87% in 2020). 13% of respondents who streamed TV programs did so using a mix of lawful and unlawful sources (in line with 14% in 2021 and 13% in 2020), while 4% reported only streaming TV programs unlawfully (up from 1% in 2021 and 2020).

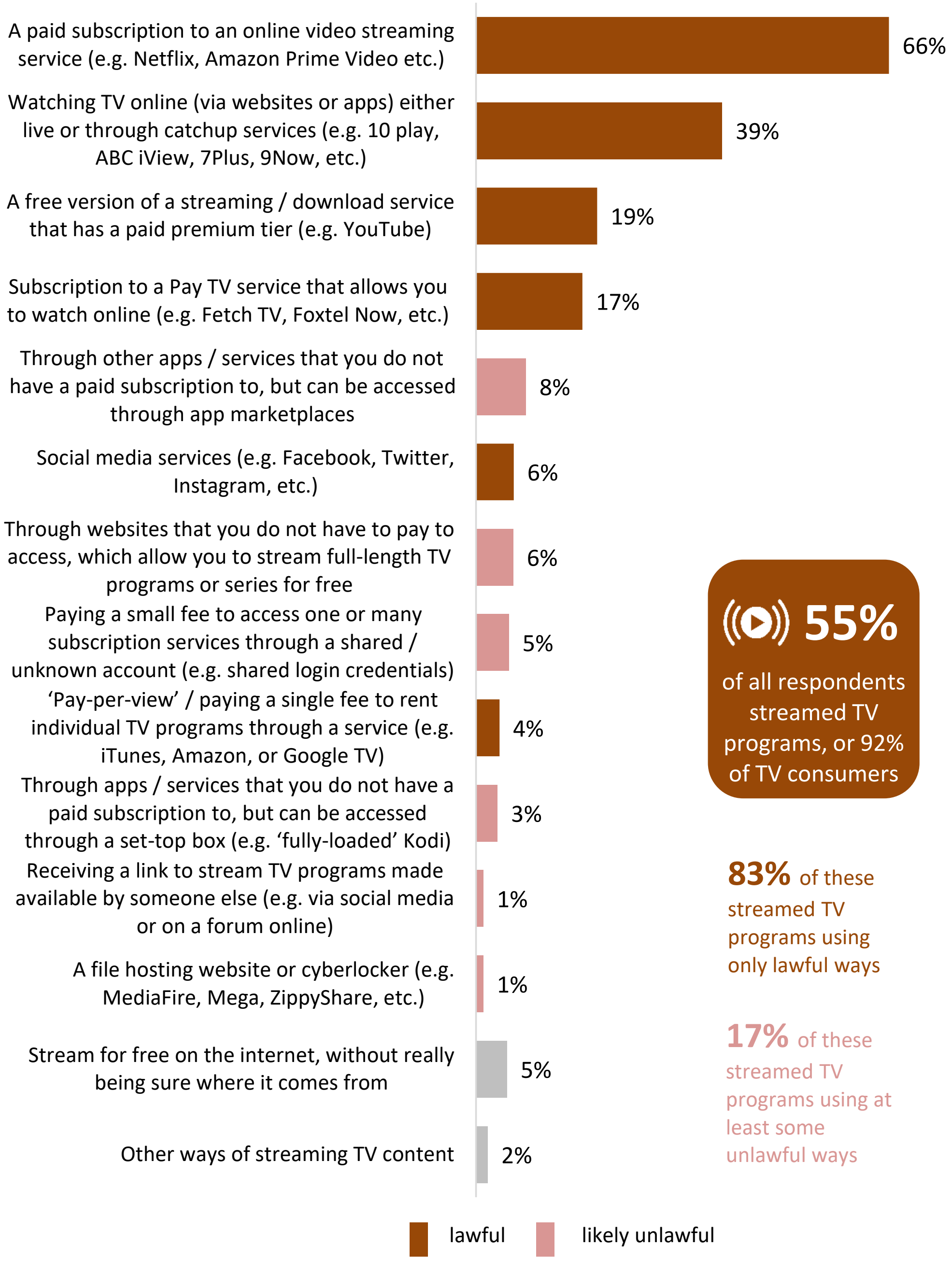
As shown in Figure 26, the most common way of streaming TV content was via paid subscription services, used by 66% of TV streamers. In addition, 19% also indicated using free versions of paid streaming services to access this content. Free-to-air catch up services were also relatively popular, used by 39% of TV streamers.

Respondents were also asked to estimate the average proportion of time they spent streaming TV content using each of the methods they indicated using. As shown in Figure 27, the vast majority of respondents streamed TV programs lawfully, having reportedly used:

- **lawful sources an average of 88% of the time** – slightly lower than the 91% seen in 2021 and 93% in 2020. Paid subscription services were again the main way respondents streamed TV programs (53%, slightly higher than 48% in 2020).
- **unlawful sources an average of 8% of the time** – slightly up from 5% in 2021 and 4% in 2020, at least in part likely to be due to the addition of two new options for respondents to choose from.

Figure 26: Typical ways of consuming TV programs online – streaming

Base: Respondents who streamed TV programs in the past 3 months (n=1,367)



Q29b. Which of the following ways have you used to <u>stream</u> TV programs in the past three months? (Multiple response)

Figure 27: Average proportion of time spent streaming TV programs, by source[19]

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

Source	2020 (n=1,432)	2021 (n=1,318)	2022 (n=1,367)
Lawful sources	**93%**	**91%**	**88%**
A paid subscription to an online video streaming service (e.g. Netflix)*	48%	50%	53%
Watching TV online either live or via TV Catch-up services (e.g. 10 play, ABC iView)	23%	22%	19%
Subscription to a Pay TV service that allows you to watch online (e.g. Fetch TV)	10%	9%	7%
NEW A free version of a streaming / download service that has a paid premium tier*	Not asked	Not asked	7%
Social media services*	11%	9%	1%
'Pay-per-view' / paying a single fee to rent individual TV programs / episodes	2%	1%	1%
Unlawful sources	**4%**	**5%**	**8%**
Apps / services accessible via app marketplaces without a paid subscription	Not asked	2%	2%
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	2%
NEW Through websites, which allow you to stream full-length TV programs or series for free	Not asked	Not asked	2%
Through apps / services that you do not have a paid subscription to, accessible via set-top box	2%	1%	1%
Receiving a link to stream TV programs made available by someone else	1%	1%	0%
A file hosting website or cyberlocker	1%	1%	0%
Other sources	**3%**	**4%**	**4%**
Stream for free from the internet, without really being sure where it comes from	2%	3%	2%
Other	1%	1%	2%

Q32. How is the way you stream TV programs typically split across the following? (Enter percentage of time for each option). * Note: In 2022, the YouTube example was reallocated to streaming services to better reflect its function in the marketplace. Prior to 2022, YouTube was included as an example under the social media category.

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

TV program streaming behaviours varied somewhat by age, household income and employment status (see Table 16).

Proportional usage of lawful services was high across all age groups, though reported usage of **unlawful sources** was again slightly higher for respondents **aged between 12 and 24** – in part reflecting a higher use of a method introduced in the 2022 survey of paying a small fee to access subscription services through a shared / unknown account.

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 (86% compared to 92% of those earning between $40,000 and $80,000), and more likely to use other sources than those on higher household incomes (6% compared to 2% of those with household earnings of between $40,000 and $80,000, and 3% of those with earnings of over $80,000).

By employment status, proportional usage of lawful and unlawful streaming of TV programs online was also **broadly similar**, but as is seen across many types of online consumption, those who are **students** show similar patterns to those who are aged 12-24 – and here they report higher levels of unlawful streaming.

Table 16: Average proportion of time spent streaming TV programs, by age, gender, household income and employment status, 2022

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=	1,367	697	668	316	267	264	238	161	121	255	372	581	467	207	91	75	72	177	94	53	148
Lawful	**88%**	**87%**	**91%**	**81%**	**89%**	**88%**	**94%**	**92%**	**90%**	**86%**	**92%**	**88%**	**89%**	**91%**	**91%**	**94%**	**96%**	**78%**	**94%**	**86%**	**86%**
A paid for subscription service	53%	50%	56%	53%	61%	58%	56%	46%	38%	48%	49%	58%	62%	54%	58%	47%	60%	49%	48%	51%	38%
TV catch-up services	19%	19%	20%	11%	15%	17%	20%	28%	33%	25%	22%	15%	12%	21%	24%	32%	18%	12%	32%	14%	27%
Subscription to Pay TV services that allows you to watch online	7%	9%	6%	7%	4%	6%	9%	9%	11%	5%	10%	8%	7%	7%	3%	10%	10%	6%	4%	9%	12%
A free version of a streaming / download service that has a paid premium tier	7%	7%	7%	8%	6%	5%	8%	7%	7%	6%	9%	6%	6%	6%	6%	6%	4%	10%	8%	7%	8%
Social media services	1%	1%	1%	2%	2%	1%	1%	1%	<1%	2%	1%	1%	2%	1%	1%	1%	3%	2%	1%	4%	1%
'Pay-per-view' / paying a single fee to rent individual TV programs / episodes	1%	1%	1%	1%	<1%	1%	<1%	<1%	1%	<1%	<1%	1%	1%	1%	<1%	<1%	0%	<1%	<1%	0%	1%
Unlawful	**8%**	**10%**	**6%**	**16%**	**6%**	**8%**	**4%**	**4%**	**5%**	**8%**	**6%**	**8%**	**8%**	**7%**	**8%**	**4%**	**2%**	**17%**	**4%**	**11%**	**6%**
Through other apps / services without paid subscription, that can be accessed through app marketplaces	2%	3%	2%	3%	1%	4%	1%	3%	3%	4%	1%	3%	3%	1%	2%	1%	1%	4%	1%	3%	4%
Paying a small fee to access subscription services through a shared / unknown account	2%	3%	1%	8%	2%	1%	1%	<1%	0%	1%	1%	3%	2%	3%	2%	1%	0%	9%	1%	2%	0%
Through websites that you do not have to pay to access, which allow you to stream full-length TV programs or series for free	2%	2%	2%	2%	1%	2%	1%	2%	2%	2%	2%	1%	1%	1%	1%	3%	1%	2%	1%	3%	2%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box (e.g. 'fully-loaded' Kodi)	1%	1%	1%	2%	1%	1%	1%	<1%	<1%	<1%	1%	1%	2%	1%	1%	<1%	0%	1%	1%	1%	<1%
Receiving a link to stream TV programs made available by someone else	<1%	<1%	<1%	1%	<1%	<1%	0%	<1%	0%	<1%	<1%	<1%	<1%	1%	1%	0%	0%	<1%	0%	0%	0%
A file hosting website or cyberlocker	<1%	<1%	<1%	<1%	<1%	<1%	<1%	0%	0%	0%	<1%	<1%	<1%	<1%	1%	<1%	0%	<1%	0%	1%	0%
Other	**4%**	**3%**	**3%**	**3%**	**5%**	**4%**	**1%**	**4%**	**5%**	**6%**	**2%**	**3%**	**3%**	**2%**	**1%**	**1%**	**2%**	**5%**	**2%**	**4%**	**8%**
Stream for free from the internet, without really being sure where it comes from	2%	3%	1%	2%	1%	3%	1%	2%	2%	4%	1%	2%	2%	<1%	1%	1%	2%	3%	1%	2%	4%
Other	2%	1%	2%	1%	4%	1%	<1%	2%	3%	2%	1%	1%	1%	1%	0%	0%	0%	2%	1%	2%	4%

Q32. How is the way you stream 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 categories 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.

Sources of downloading TV programs

Respondents were asked to nominate the sources they typically used to download TV programs online. As with streaming, these were also categorised in terms of likely lawfulness.

41% downloaded TV programs online using **only lawful** sources (up from 37% last year, and 35% in 2020).

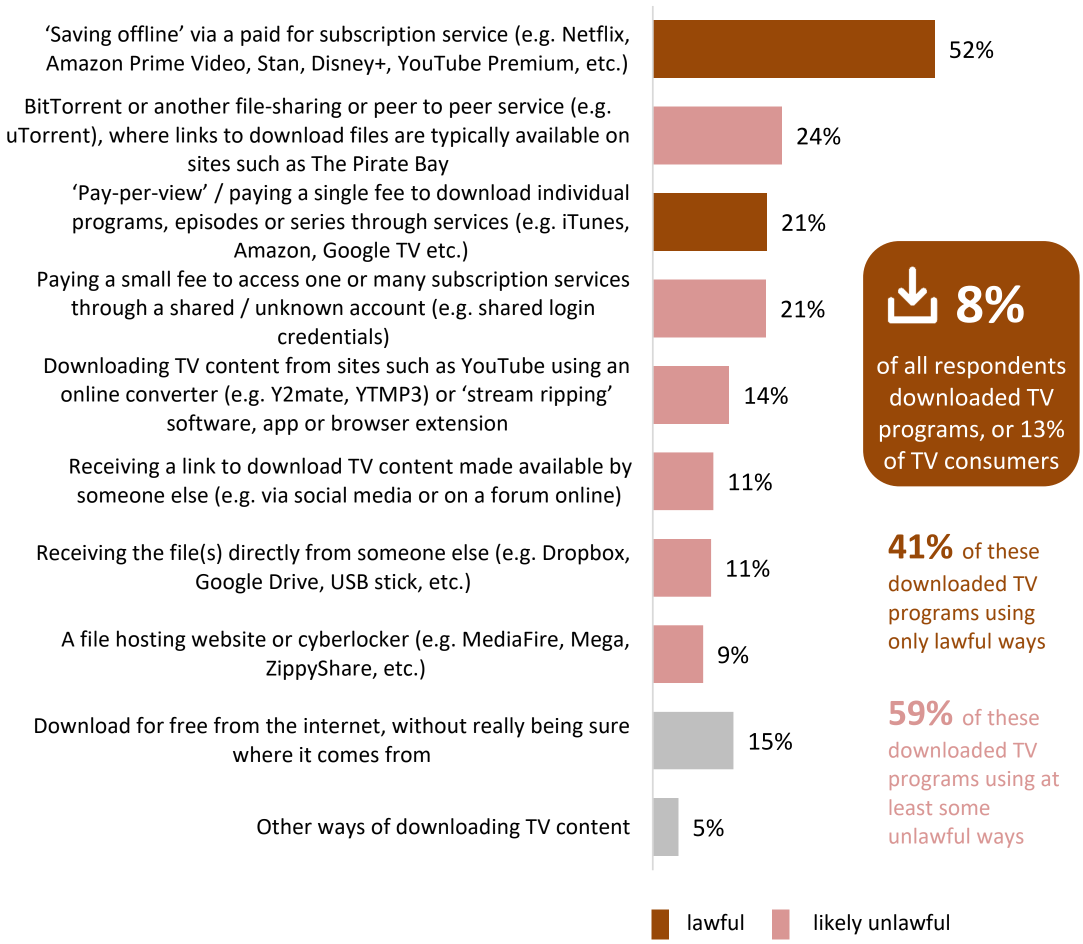
28% downloaded TV programs using a **mix of lawful and unlawful ways** (down from 41% in 2021 and 40% in 2020).

31% downloaded TV programs using **only unlawful sources** (up from 22% last year, and 25% in 2020). This increase was at least in part due to the survey changes made in 2022, with the additional category of paying a small fee to access subscription services through a shared / unknown account being included in the unlawful category.

As illustrated in Figure 28, 'saving offline' via paid subscription services was the most commonly reported way respondents said they downloaded TV programs (52%). A range of other, mostly unlawful ways were also reported, with BitTorrent and paying to access subscription services through a shared / unknown account key among them.

Figure 28: Typical ways of consuming TV programs online – downloading

Base: Respondents who downloaded TV programs in the past 3 months (n=215)



Q29a. Which of the following ways have you used to download TV programs in the past three months? (Multiple response)

Respondents were also asked to indicate the proportion of the time they spent using each source to download TV content. As shown in Figure 29, reported usage across sources was similar to 2020 and 2021, with respondents indicating that they used:

- **lawful sources an average of 48% of the time** – largely stable since 2020, most commonly 'saving offline' from a paid subscription service, which has remained stable at 40% for the past three years; and
- **unlawful sources an average of 39% of the time** – with levels similar over the past three years, most commonly via BitTorrent or another file-sharing or peer to peer service (14%); or the newly added category of paying a small fee to access subscription services through a shared / unknown account (11%). The proportion of time spent downloading via unlawful sources remained unchanged predominantly due to the addition of this new paid login credentials category, the use of which offset cumulative incremental declines in use of all other previously included methods.

Figure 29: Average proportion of time spent downloading TV programs, by sources[20]

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

Source	2020 (n=263)	2021 (n=199)	2022 (n=215)
Lawful sources	**50%**	**50%**	**48%**
'Saving offline' via a paid for subscription service (e.g. Netflix, Amazon Prime Video)	40%	40%	40%
'Pay-per-view' / paying a single fee to download individual TV programs or series	10%	10%	8%
Unlawful sources	**40%**	**37%**	**39%**
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent)	17%	17%	14%
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	11%
Using an online converter (e.g. Y2mate, YTMP3) or 'stream ripping' software	10%	7%	4%
Receiving a link to download TV programs made available by someone else	5%	5%	4%
A file hosting website or cyberlocker	4%	2%	3%
Receiving the file(s) directly from someone else (e.g. Dropbox, Google Drive, USB stick)	4%	4%	2%
Other sources	**10%**	**14%**	**13%**
Download for free from the internet, without really being sure where it comes from	8%	10%	8%
Other	2%	3%	5%

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

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

As illustrated in Table 17, TV program downloading behaviours varied somewhat by age, gender and household income.

Older respondents reported lower proportions of time downloading TV programs in unlawful ways – but a greater proportion of their time doing so in 'other' ways, including without really knowing what the source is.

On average, **males** estimated the proportion of their time spent using **unlawful sources** to download TV programs was much higher than for females.

Though results did not vary substantially by household income, those earning less than **$40,000** spent less time on average using unlawful sources to download TV programs compared to those earning more – but a greater proportion in the 'other' category where they were not really sure what the source was.

Given available sample sizes, there were no meaningful differences that could be observed across employment categories.

Table 17: Average proportion of time spent downloading TV programs, by age, gender, household income and employment status, 2022

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 work)	Unemployed (not looking for work)	Retired
n=	215	133	82	88	39	39	19*	14*	16*	41	58	90	74	44	10*	9*	5*	43	12*	7*	17*
Lawful	**48%**	**43%**	**57%**	**49%**	**57%**	**51%**	**43%**	**51%**	**29%**	**46%**	**44%**	**51%**	**48%**	**64%**	**74%**	*	*	**52%**	**44%**	*	**20%**
'Saving offline' on a paid for subscription service	40%	34%	48%	36%	52%	47%	24%	46%	29%	45%	33%	41%	37%	51%	57%	*	*	44%	44%	*	20%
Paying a single fee to download TV programs / episodes through a service	8%	8%	9%	13%	5%	5%	19%	6%	0%	<1%	11%	10%	10%	13%	17%	*	*	8%	0%	*	0%
Unlawful	**39%**	**46%**	**28%**	**44%**	**36%**	**45%**	**40%**	**33%**	**22%**	**34%**	**44%**	**44%**	**47%**	**33%**	**15%**	*	*	**39%**	**38%**	*	**25%**
BitTorrent or another file-sharing or peer to peer service	14%	19%	7%	8%	16%	27%	13%	29%	6%	21%	20%	9%	13%	10%	10%	*	*	8%	34%	*	16%
Paying a small fee to access subscription services through a shared / unknown account	11%	12%	10%	16%	12%	7%	6%	1%	13%	7%	8%	18%	16%	8%	5%	*	*	15%	0%	*	7%
Using an online converter (e.g. Y2mate, YTMP3) or 'stream ripping' software, app or browser extension	4%	5%	3%	4%	4%	5%	11%	4%	0%	4%	7%	3%	8%	1%	0%	*	*	6%	2%	*	2%
Receiving a link to download TV programs made available by someone else	4%	5%	2%	7%	2%	1%	2%	0%	3%	<1%	2%	6%	3%	8%	0%	*	*	5%	0%	*	0%
A file hosting website or cyberlocker	3%	3%	3%	5%	2%	1%	7%	0%	0%	<1%	4%	4%	4%	3%	0%	*	*	3%	0%	*	1%
Receiving the file(s) directly from someone else	2%	2%	2%	4%	<1%	4%	2%	0%	<1%	1%	2%	3%	2%	2%	0%	*	*	2%	1%	*	0%
Other	**13%**	**11%**	**16%**	**7%**	**7%**	**4%**	**17%**	**16%**	**49%**	**21%**	**13%**	**5%**	**6%**	**3%**	**10%**	*	*	**8%**	**18%**	*	**55%**
Download for free from the internet, without really being sure where it comes from	8%	6%	12%	6%	5%	1%	10%	16%	27%	13%	6%	3%	4%	3%	10%	*	*	6%	10%	*	28%
Other	5%	5%	4%	1%	2%	2%	8%	0%	23%	8%	6%	2%	2%	0%	0%	*	*	2%	8%	*	27%

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 categories 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 (*).

Profile of TV program infringers

Overall (across both downloading and streaming / accessing), 78% of TV consumption online was done though lawful sources (non-infringers), slightly down from 80% in 2021 and 2020.

22% of respondents consumed TV programs in at least some **unlawful ways** (infringers, in line with 20% in 2021 and 2020) – 16% through a mix of lawful and unlawful sources (18% in 2021 and 2020), and 6% via unlawful sources only (up from 2% in 2021 and 2020).

Table 18 illustrates several key demographic and behavioural differences between the two groups of consumers (infringers and non-infringers of TV programs).

Table 18: Profile of TV program infringers versus non-infringers

78% Non-infringers (all activities lawful) Base: Respondents who consumed TV programs online lawfully only (n=1,100)	22% Infringers (some or all activities unlawful) Base: Respondents who consumed TV programs online unlawfully (n=321)
Compared to infringers, non-infringers were more likely to be:	Compared to non-infringers, infringers were more likely to be:
Female (51%) *(37%)*^	Male (63%) *(49%)*^
Aged 35 years and over (62%) *(46%)*	Aged 12 to 24 years (37%) *(19%)*
No substantial differences by household income	No substantial differences by household income
Retired (14%) *(9%)*	Student (20%) *(11%)*
And were more likely to report:	And were more likely to report:
Streaming / accessing TV programs online (98%) *(83%)*	Downloading (34%) *(7%)* and sharing (11%) *(3%)* TV programs online
Using Netflix (62%) *(43%)*	Using many sites / services to consume TV programs online
	Unlawfully consuming music (61%), movies (75%), sports (58%) and video games (52%) online

^Results in coloured italics and brackets indicate the infringer (pink) or non-infringer (orange) result for comparison.

VIII. Video games

Video games

Content consumption summary (2022)

37% (+11%) of all respondents **consumed** video games online in 2022

74% (+3%) of video game consumers accessed all content ONLY **lawfully**

26% (-3%) of video game consumers accessed at least some content **unlawfully**

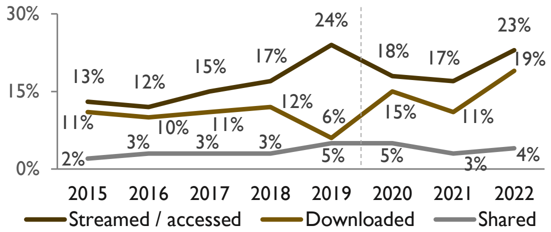
How is video game content consumed through the internet?

In the past 3 months:

23% **streamed / accessed** video games online

19% **downloaded** video games online

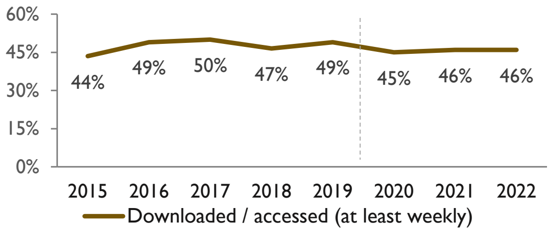
4% **shared** video games online



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

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

72% did so **at least monthly**



Where are people going to consume video game content online?

In 2022, the top three ways to **download / access** video game content online were:

1. A video game subscription or streaming service – 32%
2. Accessing video games using your internet browser – 22%
3. Paying a single fee to download individual video games – 22%

In 2022, the top three sites or services to **download / access** video game content online were:

40% (+18%) Google Play

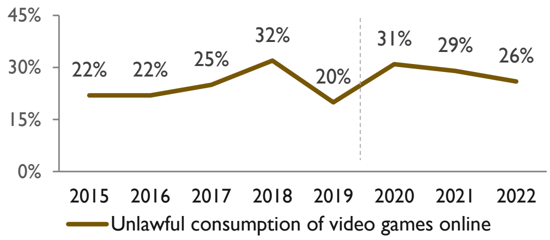
29% (+10%) Apple Store

24% (+13%) PlayStation Store

How much video game content consumption online was at least partly unlawful?

26% of those who **downloaded / accessed** video games online did so unlawfully

13% of average time spent **downloading / accessing** video games was unlawful



Characteristics of Infringers

- Male (68%)
- Aged 12 to 24 years (45%)
- Students (30%)

Behaviours of Infringers

- Use most sites / services to consume video games online
- Unlawfully consume music (58%), TV programs (62%), sports (58%) and movies (64%) online

NOTE: Caution should be used when comparing 2020-22 results to previous years due to methodology changes (indicated by vertical dotted line in charts). Numbers in brackets present the change in the result compared to the previous year.
* Denotes methods of streaming or downloading video games where at least some of this is potentially unlawful.

Chapter overview

This chapter presents the findings in relation to video game consumption online. 37% of respondents had engaged with video games online in the past 3 months (substantially higher than 26% in 2021). Streaming or accessing of video games online (23%) was only slightly more common than downloading (19%), and both of these were higher than the 17% and 11% respectively in 2021.

Of the respondents who indicated that they consumed video games online, 74% did so through exclusively lawful sources (non-infringers), compared to 71% in 2021. The remaining 26% consumed at least some video games via unlawful sources (infringers), usually in addition to some lawful sources. Only a small proportion (7%) of video game consumers used only unlawful ways to access this content.

See page 5 for information about important modifications to the survey methodology. These changes may impact on lawful and unlawful consumption results in this section. The changes were made to make the survey more sensitive overall to some emerging methods of unlawful consumption.

Consumption behaviours

37% of respondents had **engaged with video games online in the past 3 months** (downloaded, streamed or shared)[21], up from 26% last year, and 30% in 2020.

Of those who had engaged with video games online, respondents were most likely to do so through streaming / accessing (23%, up from 17% in 2021 and 18% in 2020). 19% of respondents also downloaded video games online, up from 11% last year, and 15% in 2020, whilst a small proportion reported sharing video games online (4%, comparable to 3% in 2021).

23% of all respondents streamed video games, or 62% of video game consumers

19% of all respondents downloaded video games, or 50% of video game consumers

As shown in Table 19, downloading video games for free from platforms such as Google Play, the Apple App Store and similar was the most commonly cited way of accessing video games online (49%). Incidence of this method has declined compared to the last two years (57% in 2021 and 2020), likely due to the addition of a new option in 2022 – accessing video games using your internet browser (playing directly via websites), potentially enabling respondents to more accurately describe their behaviours. This source was cited by 22% of video game consumers in 2022.

[21] Q12. In the past 3 months, which of the following have you streamed / accessed, downloaded, or shared / uploaded through the internet? (n=2,400).

Use of video game subscription services continued to increase in 2022, now used by 32% of video game consumers.

Use of all other access methods declined since last year, most notably pay-per-download services (22%, down from 54% over the past two years), and social media (10%, down from 27% last year). Incidence of file sharing of different types all declined as well, but by a smaller amount.

Table 19: Ways used to consume (download or stream) video games online in the past 3 months

Base: Respondents who had accessed video games online in the past 3 months

Method	2020 (n=737)	2021 (n=618)	2022 (n=910)
LAWFUL			
Downloading video games for free (e.g. through Apple App Store or Google Play)	57%	57%	49%
A video game subscription or streaming service	22%	27%	32%
NEW Accessing video games using your internet browser (playing directly via websites)	Not asked	Not asked	22%
Paying a single fee to download individual games through services	54%	54%	22%
Social media services	28%	27%	10%
UNLAWFUL			
Paying a small fee to access one or many subscription services through a shared / unknown account (e.g. shared login credentials)	10%	10%	11%
Downloading modded versions of mobile games for free	18%	17%	9%
Receiving a link to access video games made available by someone else	14%	12%	5%
Receiving the file(s) directly from someone else	14%	13%	5%
BitTorrent or another file-sharing or peer to peer service	13%	12%	4%
Downloading emulator versions of typically older games for free	12%	10%	4%
A file hosting website or cyberlocker	13%	11%	3%
Downloading a crack for a game to bypass Digital Rights Management (DRM) or other security protocols for lawfully downloaded games	9%	6%	3%
OTHER			
Downloading or streaming for free from the internet, without really being sure where it comes from	12%	12%	7%
Other	2%	0%	4%

Q43. Which of the following ways have you used to download/stream/access [media content] in the past 3 months? (Multiple response).

Note: Figures for 2020 and 2021 are calculated using 'Q46. Compared to this time last year, how often are you using this method to access video games?'. Caution is advised when comparing results between 2022 and prior years.

In terms of services used, Google Play (40%) was again the most common specific source for engaging with video games online, followed by the Apple App Store (29%), and the PlayStation Store (24%). All three of these were 10-15% higher than in 2021 (see Figure 30).

Figure 30: 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

Service	2020 (n=738)	2021 (n=626)	2022 (n=799)
Google Play	27%	22%	40%
Apple (App) Store	24%	19%	29%
PlayStation Store (previously PlayStation Network)	19%	11%	24%
Microsoft Store (Xbox) (previously Xbox Live)	16%	12%	15%
Facebook Games	20%	17%	13%
PlayStation Plus	Not asked	11%	12%
Microsoft Store (PC)	Not asked	8%	12%
Steam	15%	14%	10%
Xbox Game Pass	Not asked	9%	9%
Nintendo eShop	12%	6%	9%

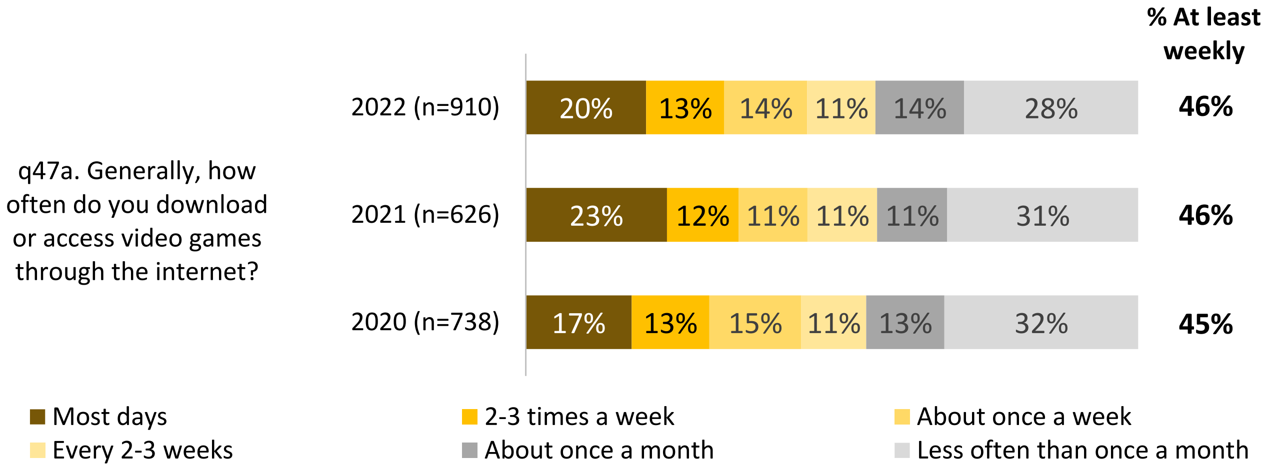
Q45A/B/E/F/G. Which of the following [access category] services have you used in to access video games online in the past 3 months? (Results aggregate several multiple response questions). Note: Prior to 2022, this question was asked as a single multiple response question. The question was broken up into several questions in 2022 when the service list became too long for respondents to easily and accurately respond to. Due to this change, comparisons of results between these periods should be made with caution.

Frequency of consumption

The proportion of respondents who download or access video games online at all and who do so at least weekly is unchanged (46% – see Figure 31).

Figure 31: 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 20 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** are the most likely to consume video games online, and consumption decreases significantly among those aged 45 and older**.** For those who do consume video games online though, frequency of consumption does not vary with age.

Overall consumption of video games and frequency of consumption is considerably higher among **males**.

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

Students again reported the highest consumption levels of video games online.

Table 20: Consumption of video games online, by age, gender, household income and employment status, 2022

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=	2,400	1,198	1,198	540	407	441	406	326	280	536	655	909	772	344	141	130	124	291	151	108	336
Consume video games online	**37%**	**43%**	**31%**	**67%**	**55%**	**42%**	**25%**	**20%**	**8%**	**29%**	**34%**	**44%**	**46%**	**37%**	**43%**	**29%**	**30%**	**72%**	**41%**	**30%**	**9%**
Accessed n=	952	545	405	360	225	189	94	58	26*	169	240	419	353	137	61	47	39	205	62	27*	36
2-3 times a week or more often	32%	34%	29%	31%	31%	30%	44%	27%	41%	29%	33%	35%	33%	28%	31%	23%	21%	32%	32%	31%	51%
About once every 1-3 weeks	25%	28%	21%	35%	21%	27%	10%	11%	5%	23%	25%	25%	24%	24%	21%	24%	19%	37%	22%	17%	3%
About once a month or less often	43%	38%	50%	33%	48%	43%	47%	62%	53%	47%	42%	41%	43%	48%	49%	53%	60%	30%	46%	52%	46%

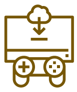
Q42. Generally, how often do you download or access video games through the internet?

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 categories 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.

Sources of downloading or accessing video games

Respondents were asked to nominate the sources they typically used to download or access video games 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 or access video games.[22]



74%

downloaded or accessed video games online through **lawful** sources only (in line with 71% last year, and 69% in 2020). Around two-in-five (19%) of respondents used a mix of lawful and unlawful sources, and 7% used only unlawful sources.

As shown in Figure 32, the most common ways of engaging with video games online were by downloading games for free from platforms such as Google Play or the Apple App Store (49%), via a subscription or streaming service (32%), by playing games directly via websites (22%), or paying a single fee to download a specific game (22%).

Respondents were also asked to indicate the proportion of their time was spent using each source nominated. Figure 33 shows that respondents reported **similar proportional use of lawful and unlawful sources as in previous years**, with respondents reportedly using:

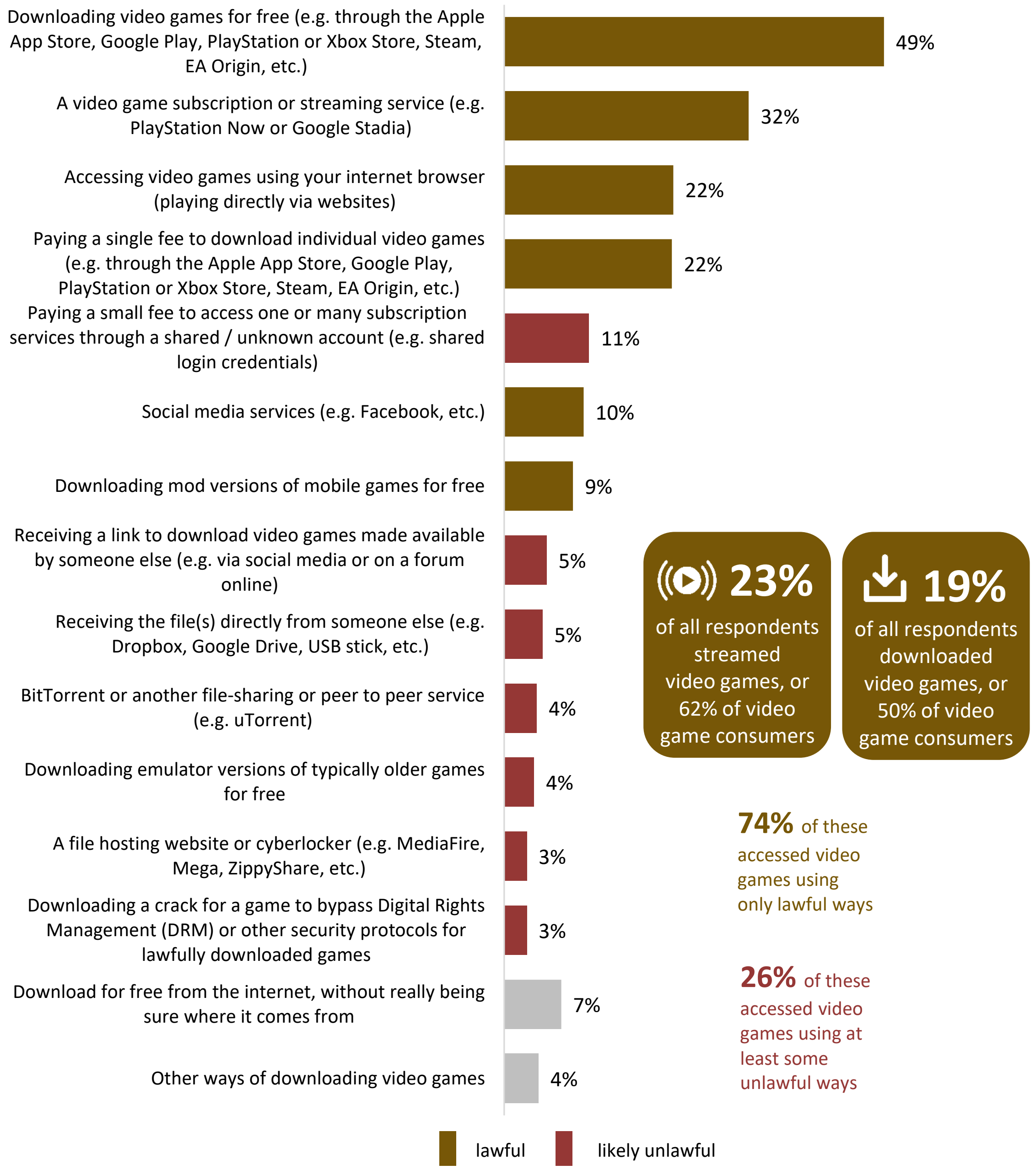
- **lawful sources an average of 78% of the time –** broadly similar to 2020 and 2021 – commonly downloading video games for free from Google Play or similar outlet (32%, no change from 2021), using a video game subscription or streaming service (21%, up from 10%), or paying a single fee to download (10%, down from 30%); and
- **unlawful sources on average 13% of the time** – in line with 2021.

The results shown in Figure 33 suggest that the ways that respondents are engaging with video games online may be changing from year-to-year, with use of subscription services increasing and single fee downloads decreasing.

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

Figure 32: Typical ways of consuming video games online – accessed

Base: Respondents who accessed video games in the past 3 months (n=910)



Q43a. Which of the following ways have you used to download / access video games in the past three months? (Multiple response)

Figure 33: Average proportion of time spent downloading / accessing video games, by source[23]

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

Source	2020 (n=738)	2021 (n=626)	2022 (n=910)
Lawful sources	**79%**	**83%**	**78%**
Downloading video games for free (e.g. through the Apple App Store, Google Play etc.).	32%	33%	32%
A video game subscription or streaming service (e.g. PlayStation Now or Google Stadia)	6%	10%	21%
NEW Accessing video games using your internet browser (playing directly via websites)	Not asked	Not asked	11%
Paying a single fee to download individual video games (e.g. through Google Play, etc.)	32%	30%	10%
Social media services	10%	10%	5%
Unlawful sources	**16%**	**13%**	**13%**
Paying a small fee to access subscription services through a shared / unknown account	1%	1%	5%
Downloading mod versions of mobile games for free	4%	3%	3%
Receiving a link to download video games made available by someone else	2%	2%	1%
Receiving the file(s) directly from someone else (e.g. Dropbox, Google Drive, USB stick)	2%	2%	1%
Downloading emulator versions of typically older games for free	2%	2%	1%
A file hosting web site or cyberlocker (e.g. MediaFire, Mega, ZippyShare, etc.)	2%	1%	1%
Downloading a crack for a game to bypass Digital Rights Management (DRM)	1%	1%	1%
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent)	2%	2%	1%
Other sources	**5%**	**4%**	**8%**
Download for free from the internet, without really being sure where it comes from	3%	3%	4%
Other	2%	0%	4%

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

[23] 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.

As illustrated in Table 21, while absolute levels of video game consumption vary by demographics, amongst those who engage with video games, behaviours only vary somewhat by age, gender, household income and employment status.

The majority of all age groups consume video games online lawfully for the majority of the time. **Younger respondents** report a higher proportion of time spent using unlawful consumption methods, while **older respondents** are more likely to be in the 'other' source category, including not really knowing what the source really is.

Males reported a higher proportion of time spent using unlawful sources, while females were more likely to report time spent in 'other' ways of consuming video games.

By household income, there were **only minor differences** – with households that have an income below $40,000 being slightly less likely to report time spent on unlawful consumption, but slightly more classified as 'other'.

By **employment status, students** and the **full-time employed** were most likely to use unlawful sources to download / access video games online.

Table 21: Average proportion of time spent downloading / accessing video games, by age, gender, household income and employment status, 2022 (continues overleaf)

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=	910	517	391	344	214	182	91	57	22*	164	231	397	329	133	60	45	39	200	61	27*	31
Lawful	**78%**	**78%**	**80%**	**76%**	**78%**	**84%**	**83%**	**68%**	**80%**	**78%**	**80%**	**79%**	**79%**	**80%**	**84%**	**78%**	**88%**	**73%**	**87%**	**63%**	**77%**
Downloading video games for free (e.g. through the Apple App Store, Google Play, PlayStation or Xbox Store)	32%	31%	35%	26%	30%	38%	38%	43%	33%	30%	38%	31%	29%	36%	45%	32%	38%	26%	37%	34%	40%
A video game subscription or streaming service	21%	22%	19%	24%	23%	19%	25%	3%	4%	21%	17%	23%	26%	16%	20%	15%	15%	20%	26%	8%	6%
Accessing video games using your internet browser (playing directly via websites)	11%	10%	12%	12%	6%	10%	5%	14%	35%	12%	9%	11%	9%	11%	10%	16%	5%	13%	6%	13%	24%
Paying a single fee to download individual video games (e.g. through the Apple App Store, Google Play, Steam)	10%	12%	8%	9%	14%	13%	6%	2%	4%	9%	11%	11%	11%	11%	7%	9%	14%	10%	11%	9%	0%
Social media services	5%	3%	7%	4%	4%	4%	8%	6%	4%	5%	5%	4%	3%	6%	2%	7%	16%	4%	7%	<1%	8%
Unlawful	**13%**	**17%**	**8%**	**18%**	**15%**	**10%**	**8%**	**8%**	**6%**	**11%**	**12%**	**14%**	**14%**	**9%**	**11%**	**11%**	**5%**	**20%**	**7%**	**9%**	**6%**
Paying a small fee to access subscription services through a shared / unknown account	5%	8%	2%	10%	5%	2%	3%	<1%	0%	4%	5%	5%	4%	3%	4%	6%	2%	11%	3%	4%	2%
Downloading mod versions of mobile games for free	3%	2%	4%	3%	5%	2%	2%	4%	1%	1%	3%	3%	3%	3%	7%	<1%	1%	3%	1%	<1%	0%
Receiving a link to download video games made available by someone else	1%	1%	<1%	1%	2%	<1%	<1%	0%	5%	1%	1%	1%	<1%	1%	<1%	0%	0%	2%	1%	<1%	4%
Receiving the file(s) directly from someone else	1%	2%	1%	2%	1%	1%	<1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	2%	<1%	1%	0%
Downloading emulator versions of typically older games for free	1%	1%	<1%	1%	1%	2%	1%	<1%	0%	1%	1%	1%	1%	<1%	0%	2%	1%	<1%	2%	<1%	0%
A file hosting web site or cyberlocker	1%	1%	<1%	1%	<1%	1%	<1%	3%	0%	<1%	<1%	1%	2%	<1%	0%	0%	0%	1%	0%	<1%	0%

	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=	910	517	391	344	214	182	91	57	22*	164	231	397	329	133	60	45	39	200	61	27*	31
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%	2%	<1%	0%	1%	<1%	1%	1%	<1%	0%	<1%	0%	<1%	0%	3%	0%
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent)	1%	1%	<1%	1%	1%	1%	<1%	0%	0%	1%	1%	<1%	1%	<1%	0%	<1%	0%	1%	<1%	<1%	0%
Other	**8%**	**6%**	**12%**	**6%**	**7%**	**6%**	**10%**	**24%**	**14%**	**12%**	**8%**	**7%**	**7%**	**11%**	**4%**	**11%**	**7%**	**6%**	**6%**	**28%**	**17%**
Download for free from the internet, without really being sure where it comes from	4%	4%	5%	4%	3%	3%	5%	8%	10%	4%	3%	4%	4%	5%	3%	5%	4%	4%	2%	<1%	10%
Other	4%	2%	7%	2%	4%	4%	5%	16%	4%	8%	4%	3%	3%	6%	2%	7%	3%	3%	4%	27%	6%

Q44. How is the way that you download / access video games 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 categories 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.

Profile of video game infringers

74% of respondents consumed video games online through only lawful sources (non-infringers), up from 71% last year and 69% in 2020.

26%

of respondents consumed video games in at least some **unlawful** ways (infringers, down from 29% last year, and 31% in 2020). 19% did so through a mix of lawful and unlawful sources (down from 24% in 2021 and 25% in 2020), and 7% via unlawful sources only (up from 5% in 2021, but in line with 7% in 2020).

As shown in Table 22, there were several key demographic and behavioural differences between the two groups of consumers (infringers and non-infringers of video games).

Table 22: Profile of video game infringers versus non-infringers

74% Non-infringers (all activities lawful) Base: Respondents who consumed video games online lawfully only (n=637)	26% Infringers (some or all activities unlawful) Base: Respondents who consumed video games online unlawfully (n=209)
Compared to infringers, non-infringers were more likely to be:	Compared to non-infringers, infringers were more likely to be:
Female (46%) *(29%)^*	Male (68%) *(54%)^*
Aged 35 years and over (44%) *(25%)*	Aged 12 to 24 years (45%) *(33%)*
No substantial differences by household income	No substantial differences by household income
Retired (4%) *(1%)*	Student (30%) *(19%)*
And were more likely to report:	And were more likely to report:
Accessing music (71%) *(57%)*, movies / films (79%) *(70%)*, and TV programs (81%) *(72%)* by streaming this content	Using most sites / services to consume video games online
	Unlawfully consuming music (58%), movies (64%), TV programs (62%), and sports (58%).

*Excludes don't know and prefer not to say

^Results in coloured italics and brackets indicate the infringer (red) or non-infringer (brown) result for comparison.

IX. Live sport

Live sports

Content consumption summary (2022)

34% (+8%) of all respondents **consumed** live sports online in 2022

74% (-2%) of live sports consumers accessed all content ONLY **lawfully**

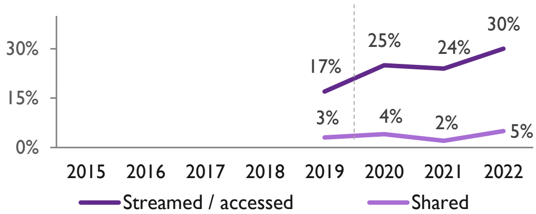
26% (+2%) of live sports consumers accessed at least some content **unlawfully**

How is live sport content consumed through the internet?

In the past 3 months:

30% **streamed / accessed** live sport content online

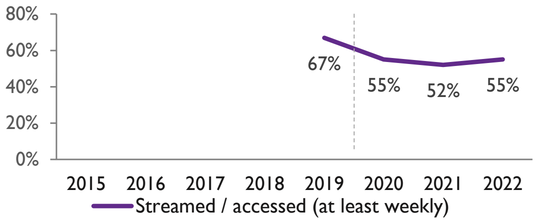
5% **shared** live sport content online



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

55% streamed / accessed live sport **at least weekly**

76% did so **at least monthly**



Where are people going to consume live sport content online?

In 2022, the top three ways to **stream / access** live sport content online were:

1. A paid subscription to a sports platform that can be accessed online – 42%
2. Watching live sport on free-to-air TV online – 38%
3. Subscription to a Pay TV service that allows you to watch online – 18%

In 2022, the top three sites or services to **stream / access** live sport content online were:

31% (+6%) Kayo Sports

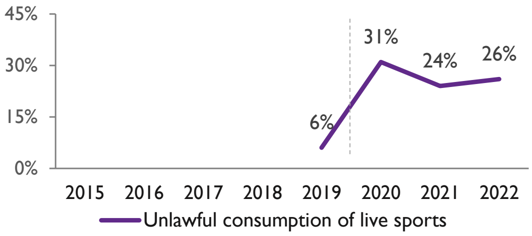
26% (+12%) 7plus

25% (+12%) 9Now

How much live sport content consumption online was at least partly unlawful?

26% of those who **streamed / accessed** live sports online did so unlawfully

16% of average time spent **streaming / accessing** live sports was unlawful



Characteristics of Infringers

- Male (72%)
- Aged 12 to 44 years (83%)
- Students (25%)
- Household income <$40,000 (26%)

Behaviours of Infringers

- Using many sites / services to consume live sport online (excluding Kayo Sports)
- Unlawfully consuming music (55%), movies (65%), TV programs (60%), and video games (51%) online

NOTE: Caution should be used when comparing 2020-22 results to previous years due to methodology changes (indicated by vertical dotted line in charts). Numbers in brackets present the change in the result compared to the previous year.
* Denotes methods of streaming or accessing live sport where at least some of this is potentially unlawful.

ORIMA

Chapter overview

This chapter presents the findings in relation to live sport consumption online. A higher proportion of respondents had engaged with live sport online in the past 3 months in 2022, 34%, up from 26% in 2021 and 27% in 2020. The most common ways to engage with live sport online were a paid subscription that can be accessed online (with Kayo Sports the most common), or watching free to air TV that was available online (with 7plus and 9Now the most common).

Around three quarters of respondents who consume live sport online did so through only lawful sources (74%, non-infringers). The remainder consumed at least some live sport unlawfully (infringers), typically in addition to a range of lawful ways. Only a minority (10%) accessed live sport using only unlawful methods.

When interpreting the live sport section of this report, as well as the refinements in methodology, readers are encouraged to consider 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 is up to the respondent to interpret the term 'live' when considering any live sport content that they may have consumed.

See page 5 for information about important modifications to the survey methodology. These changes may impact on lawful and unlawful consumption results in this section. The changes were made to make the survey more sensitive overall to some emerging methods of unlawful consumption.

Consumption behaviours

34% of respondents had **engaged with live sport online in the past 3 months** (streamed or shared),[24] up from 26% in 2021 and 27% in 2020.

30% of respondents who engaged with live sports online by streaming (up from 24% in 2021 and 25% in 2020), and few did so via sharing (5%, compared to 2% in 2021 and 4% in 2020).

30%
of all respondents streamed / accessed live sport

As shown in Table 23, the most common ways of accessing live sport online were reported to be using a paid subscription to a sports platform (42%) and watching free-to-air TV online (38%). This latter option was first included in the survey in 2022. Given its high incidence rate, it is likely that adding this option may have affected how respondents answer this question, now having greater ability to accurately describe their behaviours. It is possible that this is, at least in part, the reason behind the marked declines in reported use of Pay TV services and official broadcasts on social media or other official websites / apps recorded this year (Pay TV accessed online 18%, down from

[24] Q12. In the past 3 months, which of the following have you streamed / accessed, downloaded, or shared / uploaded through the internet? (n=2,400).

34% in 2021, and official scheduled broadcasts on social media or other websites / apps; 12%, down from 41% last year).

The most commonly cited unlawful way of accessing live sports content was paying a small fee to access subscription platforms through shared or unknown accounts (9%), followed by websites that allow streaming of full-length content for free (7%), and via free apps or services accessible through the app marketplace (7%). All three of these methods were newly introduced into the survey in 2022, and have likely affected how respondents answer this question. It is likely that this is the reason behind the recorded declines in the use of the remaining unlawful methods since last year.

Table 23: Ways used to consume (stream / access) live sport online in the past 3 months

Base: Respondents who had accessed live sport content online in the past 3 months

Method	2020 (n=641)	2021 (n=593)	2022 (n=778)
LAWFUL			
A paid subscription to a sports platform that can be accessed online	43%	49%	42%
NEW Watching live sport on free-to-air TV online (via websites or apps)	Not asked	Not asked	38%
A subscription to a Pay TV service that allows you to watch online	44%	34%	18%
Free scheduled broadcasts by an official source on social media sites or other official website / app	47%	41%	12%
NEW 'Pay-per-view' / paying a single fee to rent / access individual sports events through a service	Not asked	Not asked	4%
UNLAWFUL			
NEW Paying a small fee to access one or many subscription services through a shared / unknown account (e.g. shared login credentials)	Not asked	Not asked	9%
NEW Through websites that you do not have to pay to access, which allow you to stream full-length live sport content for free	Not asked	Not asked	7%
NEW Through other apps / services that you do not have a paid subscription to that can be accessed through app marketplaces	Not asked	Not asked	7%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box	17%	13%	6%
A broadcast by an individual (i.e. not an official source) on social media sites like Facebook, Twitter, Twitch, Periscope, TikTok or Snapchat, or via sites such as YouTube or Daily Motion	22%	17%	6%
Receiving a link to access live sports content made available by someone else	19%	14%	2%
OTHER			
Downloading or streaming for free from the internet, without really being sure where it comes from	20%	18%	6%
Other	3%	5%	3%

Q37. Which of the following ways have you used to stream/access live sport online in the past 3 months? (Multiple response). Note: Figures for 2020 and 2021 are calculated using 'Q39. Compared to this time last year, how often are you using this method to stream/access live sport online? Caution is advised when comparing results between 2022 and prior years.

Figure 34 shows that respondents most commonly used Kayo Sports in 2022 (31%, up from 25% in 2021 and 17% in 2020), with 7plus (26%) and 9Now (25%) next most common – and both nearly double the levels reported for them in 2021. 10 play was also reported by more than twice as many respondents as in 2021 (16%, up from 5% in 2021). Foxtel Now has decreased in reported use to consume live sport online, from 32% in 2020 to 18% in 2022.

Figure 34: Top 10 services used to stream / access live sport

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

Service	2020 (n=649)	2021 (n=598)	2022 (n=712)
Kayo Sports	17%	25%	31%
7plus	Not asked	14%	26%
9Now	Not asked	13%	25%
Foxtel Now	32%	24%	18%
10 play	Not asked	5%	16%
Facebook	21%	8%	13%
ABC iView	Not asked	Not asked	11%
ESPN+ / ESPN app / WatchESPN	7%	4%	10%
Amazon Prime Video	Not asked	Not asked	9%
SBS on Demand	Not asked	Not asked	9%

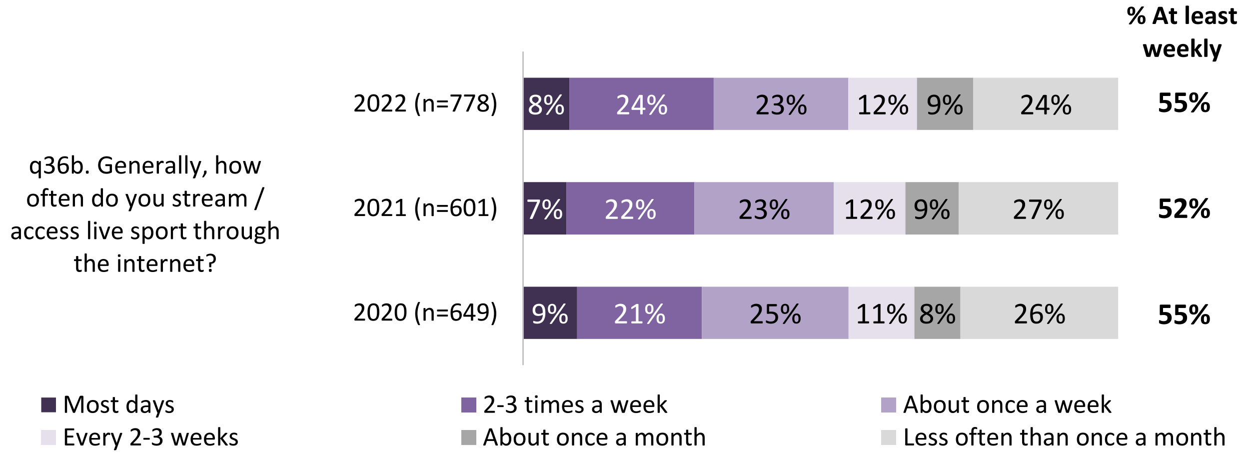
Q37A/B/C/G. Which of the following [access category] services have you used in to access live sports online in the past 3 months? (Results aggregate several multiple response questions). Note: Prior to 2022, this question was asked as a single multiple response question. The question was broken up into several questions in 2022 when the service list became too long for respondents to easily and accurately respond to. Due to this change, comparisons of results between these periods should be made with caution.

Frequency of consumption

As shown in Figure 35, amongst those who engage with live sport, the frequency of streaming / accessing live sport online was similar to 2021 and 2020, with 55% reporting doing so at least weekly (compared to 52% in 2021 and to 55% in 2020).

Figure 35: 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 24 below shows the overall amount and frequency of live sport consumption by age, gender, household income and employment status.

Younger respondents consume live sport online more commonly than older respondents do, but those relatively fewer older respondents who consume live sport online at all do so the most frequently.

Online live sport consumption was higher among **males**, who also consumed it more frequently.

Those with a household income of **over $80,000** had the highest reported consumption of live sport online, though frequency of consumption peaked in the middle income category.

Students and those working **full-time** were the most likely to have consumed any live sport online in the past 3 months, though the full-time workers were more likely to have consumed live sport online at a higher frequency than the students.

Table 24: Consumption of live sport online, by age, gender, household income and employment status, 2022

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=	2,400	1,198	1,198	540	407	441	406	326	280	536	655	909	772	344	141	130	124	291	151	108	336
Consume live sport online	**34%**	**44%**	**23%**	**49%**	**41%**	**40%**	**29%**	**22%**	**18%**	**24%**	**33%**	**42%**	**43%**	**37%**	**39%**	**33%**	**21%**	**48%**	**37%**	**13%**	**15%**
Accessed n=	778	508	269	221	164	163	103	74	53	122	197	380	311	125	46	49	23*	114	50	12*	52
2-3 times a week or more often	32%	38%	21%	25%	30%	33%	33%	44%	40%	29%	38%	32%	32%	29%	41%	27%	18%	24%	41%	64%	45%
About once every 1-3 weeks	34%	36%	31%	46%	34%	31%	30%	21%	27%	37%	29%	37%	36%	31%	30%	26%	16%	50%	30%	28%	23%
About once a month or less often	34%	27%	48%	29%	36%	36%	37%	35%	33%	34%	33%	31%	32%	40%	29%	47%	66%	26%	29%	8%	32%

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

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 categories 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.

ORIMA RESEARCH

Sources of streaming / accessing live sport

Respondents were asked to nominate the sources they typically used to stream / access live sports content 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 stream live sports.[25]

74% streamed / accessed live sport online through **lawful sources only** (broadly in line with 76% last year, and up from 69 % in 2020). 16% used a mix of lawful and unlawful sources (down from 19% last year, and 25% in 2020), and 10% streamed / accessed only unlawfully (up from 5% in 2021, and 7% in 2020).

As shown in Figure 36, respondents typically access live sport through paid subscriptions to sports platforms such as Kayo or Stan Sports (42%), followed by watching free-to-air broadcasts online (38%).

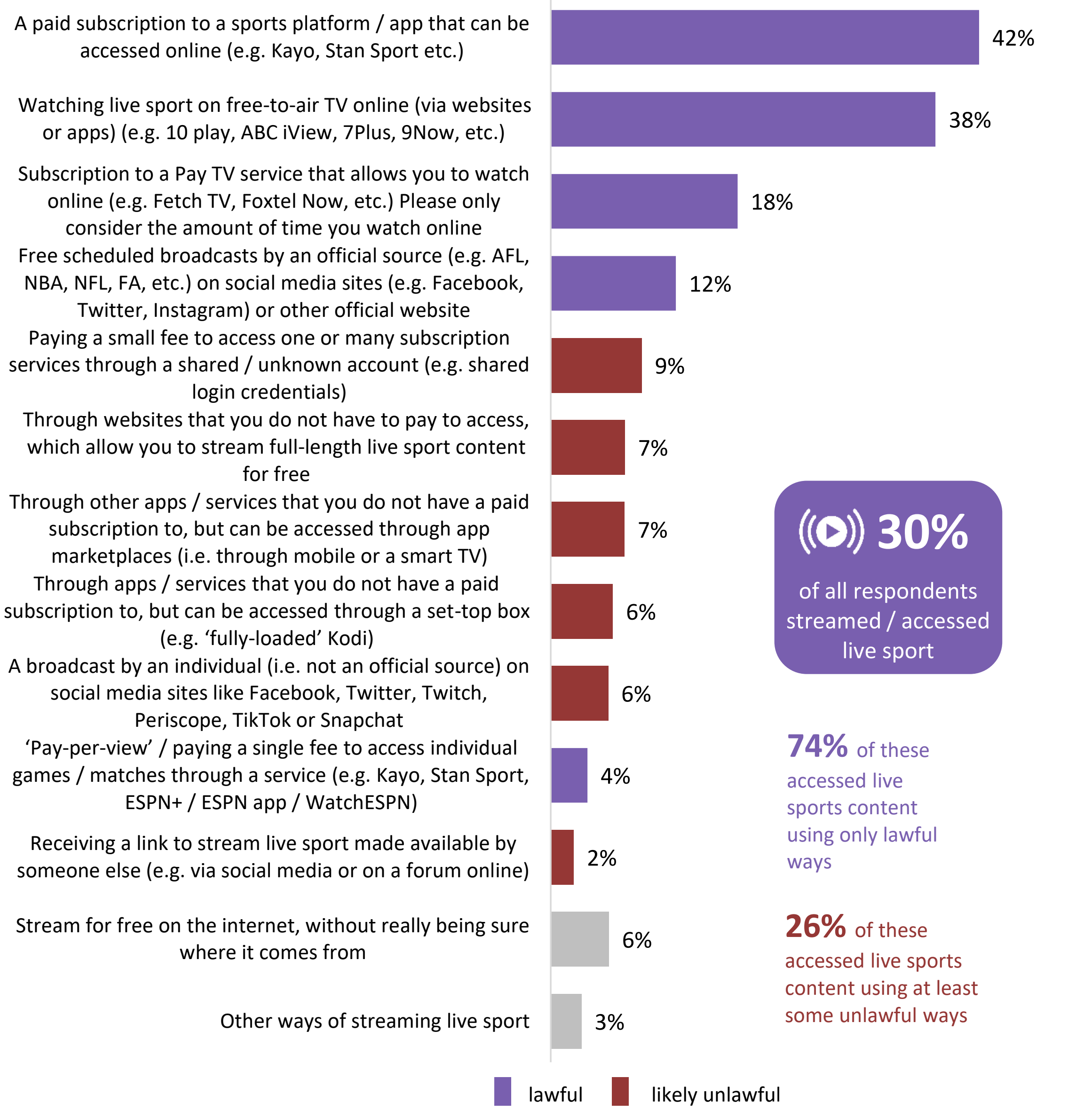
Respondents were also asked to indicate the proportion of their time spent using each source nominated to access live sports. The range of specific sources that respondents could have used to engage with live sport online was widened in the 2022 survey, resulting in a more detailed view of the different ways this is done. As illustrated in Figure 37, respondents used:

- **lawful sources on average 78% of the time** – the same as 2021, and similar to 77% in 2020. Paid subscriptions remained the most common (and most common lawful) source. Two of the lawful sources listed were added into the survey in 2022 for the first time. Given its high incidence rate of watching free-to-air TV online, it is likely that adding this option may have affected how respondents answer this question. This could be why reported use of Pay TV services and official broadcasts via social media or other official websites / apps decreased this year.
- **unlawful sources an average of 16% of the time –** higher than 10% in 2021 and 14% in 2020. Three of the unlawful sources listed were added into the survey in 2022 for the first time, and were the top most used unlawful sources in 2022.

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

Figure 36: Typical ways of consuming live sport

Base: Respondents who accessed live sport online in the past 3 months (n=778)



Q37b. Which of the following ways have you used to stream / access live sport in the past three months? (Multiple response)

Figure 37: Average proportion of time spent streaming / accessing live sport, by source[26]

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

Source	2020 (n=649)	2021 (n=601)	2022 (n=778)
Lawful sources	**77%**	**78%**	**78%**
A paid subscription to a sports platform / app that can be accessed online	24%	34%	35%
NEW Watching live sport on free-to-air TV online (via websites or apps)	Not asked	Not asked	24%
Subscription to a Pay TV service that allows you to watch online (e.g. Fetch TV etc.)	25%	20%	12%
Free scheduled broadcasts by an official source on social media sites or other official site / app	28%	24%	5%
NEW 'Pay-per-view' / paying a single fee to access individual games / matches through a service	Not asked	Not asked	1%
Unlawful sources	**14%**	**10%**	**16%**
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	5%
NEW Through websites which allow you to stream full-length live sport content for free	Not asked	Not asked	3%
NEW Other apps / services accessed through app marketplaces without paid subscriptions	Not asked	Not asked	3%
Apps / services accessed through a set-top box without a paid subscription	4%	3%	3%
A broadcast by an individual (i.e. not an official source) on social media sites or other sites	6%	5%	2%
Receiving a link to stream live sport made available by someone else	4%	3%	1%
Other sources	**9%**	**11%**	**6%**
Stream for free from the internet, without really being sure where it comes from	6%	7%	3%
Other	3%	4%	3%

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

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

Table 25 illustrates how live sport consumption behaviours varied by demographic characteristics.

Younger respondents reported a greater proportion of time spent accessing live sport through unlawful sources, especially paying a small fee to access subscription services through a shared / unknown account.

Results did not vary substantially by gender, but **males** tended to report a slightly higher proportion of time using unlawful sources – which was distributed across many of the sources classified as unlawful.

As with gender, **lower income households** reported a higher average proportion of time spent using unlawful sources, with this spread across each of the sources in that category.

Students and those who were **unemployed** reported the highest proportional usage of unlawful sources.

Table 25: Average proportion of time spent streaming live sport, by age, gender, household income and employment status, 2022 (continues overleaf)

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=	778	508	269	221	164	163	103	74	53	122	197	380	311	125	46	49	23*	114	50	12*	52
Lawful	**78%**	**77%**	**80%**	**71%**	**76%**	**73%**	**82%**	**88%**	**93%**	**68%**	**83%**	**80%**	**77%**	**84%**	**88%**	**78%**	**77%**	**65%**	**69%**	**65%**	**90%**
A paid subscription to a sports platform / app that can be accessed online	35%	37%	31%	30%	34%	32%	40%	35%	50%	33%	40%	34%	40%	31%	51%	34%	18%	25%	28%	24%	42%
Watching live sport on free-to-air TV online	24%	22%	29%	22%	26%	22%	24%	30%	28%	23%	25%	24%	21%	29%	21%	24%	39%	22%	26%	11%	29%
Subscription to a Pay TV service that allows you to watch online (e.g. Fetch TV etc.)	12%	12%	13%	12%	9%	12%	14%	19%	12%	9%	10%	15%	11%	17%	10%	12%	14%	11%	11%	25%	14%
Free scheduled broadcasts by an official source (e.g. AFL, NBA, NFL, FA, etc.) on social media sites or other official website / app	5%	4%	7%	5%	6%	6%	5%	3%	3%	4%	6%	5%	5%	5%	3%	8%	3%	6%	5%	4%	5%
'Pay-per-view' / paying a single fee to access individual games / matches	1%	1%	<1%	1%	1%	1%	<1%	<1%	0%	<1%	1%	1%	1%	1%	2%	0%	3%	1%	<1%	0%	0%
Unlawful	**16%**	**18%**	**13%**	**24%**	**18%**	**19%**	**10%**	**8%**	**3%**	**24%**	**12%**	**14%**	**17%**	**11%**	**9%**	**11%**	**10%**	**30%**	**24%**	**28%**	**4%**
Paying a small fee to access subscription services through a shared / unknown account	5%	6%	3%	12%	3%	4%	1%	<1%	0%	6%	3%	4%	3%	2%	1%	1%	2%	18%	3%	7%	0%
Through websites that you do not have to pay to access, which allow you to stream full-length live sport content for free	3%	4%	2%	2%	4%	3%	4%	1%	3%	5%	3%	3%	3%	3%	2%	5%	5%	3%	7%	0%	4%
Through other apps / services that you do not have a paid subscription to, but can be accessed through app marketplaces	3%	2%	3%	2%	4%	3%	3%	2%	0%	5%	1%	3%	3%	2%	3%	5%	<1%	2%	6%	1%	0%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box	3%	3%	2%	4%	4%	2%	1%	2%	0%	3%	2%	2%	4%	2%	0%	<1%	<1%	4%	3%	0%	0%
A broadcast by an individual (i.e. not an official source) on social media or sites	2%	2%	2%	2%	2%	5%	<1%	2%	<1%	3%	2%	2%	2%	2%	2%	<1%	1%	2%	3%	16%	1%
Receiving a link to stream live sport made available by someone else (e.g. via social media or on a forum online)	1%	1%	1%	<1%	1%	1%	1%	2%	0%	1%	1%	1%	1%	<1%	0%	0%	2%	1%	2%	4%	0%

	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=	778	508	269	221	164	163	103	74	53	122	197	380	311	125	46	49	23*	114	50	12*	52
Other	**6%**	**6%**	**7%**	**6%**	**7%**	**8%**	**7%**	**5%**	**4%**	**8%**	**5%**	**6%**	**6%**	**6%**	**3%**	**10%**	**13%**	**5%**	**7%**	**8%**	**6%**
Stream for free on the internet, without really being sure where it comes from	3%	3%	3%	3%	4%	6%	5%	<1%	0%	3%	4%	4%	4%	2%	0%	4%	9%	2%	7%	8%	0%
Other	3%	2%	4%	2%	3%	2%	3%	4%	4%	5%	1%	3%	2%	4%	3%	6%	4%	3%	0%	0%	6%

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 categories 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

Profile of live sport infringers

74% of those who consumed live sport online did so lawfully (non-infringers), down slightly from 76% last year, and up from 69% in 2020.

26% of respondents consumed live sport from at least some **unlawful** sources (infringers), up slightly from 24% last year, but down from 31% in 2020. Of these respondents, 16% accessed live sport through a mix of lawful and unlawful sources (down from 19% in 2021 and 25% in 2020), and 10% via only unlawful sources (up from 5% last year, and 7% in 2020).

Table 26 illustrates key demographic and behavioural differences between the two groups of consumers (infringers and non-infringers of live sport).

Table 26: Profile of live sport infringers versus non-infringers

74%	Non-infringers (all activities lawful) Base: Respondents who consumed live sport online lawfully only (n=535)	26%	Infringers (some or all activities unlawful) Base: Respondents who consumed live sport online unlawfully (n=197)
	Compared to infringers, non-infringers were more likely to be:		Compared to non-infringers, infringers were more likely to be:
	Aged 45 years and over (39%) *(17%)^*		Aged 12 to 44 years (83%) *(61%)^*
	Female (36%) *(27%)*		Male (72%) *(64%)*
	Household income of more than $40,000 (84%) *(74%)*		Household income of less than $40,000 (26%) *(16%)*
	Retired (11%) *(2%)*		Student (25%) *(11%)*
	And were more likely to report:		And were more likely to report:
	Streaming movies (80%) *(68%)* and TV programs (88%) *(76%)*		Using many sites / services to consume live sport online
	Using Kayo Sports to consume live sport online (35%) *(18%)*		Unlawfully consuming music (55%), movies (65%), TV programs (60%), and video games (51%) online

^Results in coloured italics and brackets indicate the infringer (red) or non-infringer (purple) result for comparison.

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 (VPNs) and custom Domain Name System (DNS) services, as well as encountering and overcoming blocked websites, and also password sharing (which is a new topic included in the 2022 survey).

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.

62% of respondents were **aware** of what a VPN service was, up from 59% last year, and 50% in 2020[27]; and

25% indicated that they had **used** a VPN service (broadly in line with 21% last year and 23% in 2020).

As shown in Figure 38, amongst those who have used a VPN the reasons for doing so have not substantively changed over the last three surveys. Of those who had used a VPN service, the most common reason was to secure their communications and internet browsing details (49%), ahead of protecting the privacy of their communications and internet browsing (47%). 32% used a VPN for work purposes (for example, to work remotely – slightly lower than the 36% in 2021 and 37% in 2020). Around a quarter report having used a VPN (at some point in time) to access content that they couldn't otherwise access from Australia (26%, unchanged from 27% in 2021 and 2020), and 19% in order to access content for free (somewhat lower than the 22% reported in 2021 and the 26% in 2020).[28]

Respondents who had sourced any online content through unlawful means (infringers) were considerably more likely than non-infringers to have used a VPN service – 39% compared to 24% for non-infringers. This pattern has been observed consistently over the past three years.

[27] In 2020 this was asked as a standalone question (Q54. Have you ever used a VPN service? (n=2,421)) whereas in 2022 and 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=2,400 and n=2,392 in 2021)).

[28] While classification of respondents as infringers or non-infringers was based on their reported consumption behaviours in the past three months, survey questions about VPN use (like custom DNS use) were not time-limited, but rather related to whether the respondent had ever used such a service, and if so, why. This is one reason why respondents classified as non-infringers may have reported having used VPN services at some point in time to access content in potentially unlawful ways.

Figure 38: Reasons for VPN usage

Base: Respondents who had used a VPN service

Service	2020 (n=578)	2021 (n=513)	2022 (n=593)
To secure my communications and internet browsing details	48%	49%	49%
For the privacy of my communications and internet browsing details	Not asked	41%	47%
For work purposes (e.g. to work remotely)	37%	36%	32%
To access content from other countries that is geoblocked in Australia	27%	27%	26%
To access free content	26%	22%	19%
To access content for a reasonable price	9%	8%	7%
Other	6%	3%	3%

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

Custom Domain Name System (DNS) services

While most people use their internet service provider's default DNS server to translate domain name requests into IP addresses, some choose to use custom DNS services. While custom DNS services may be used for a range of reasons not directly related to accessing content, including the speed, reliability, security and customisability of the user's internet experience, one potential reason is to enable access to region-restricted content by allowing the user's computer to find addresses of domains that may otherwise be blocked.

23% of respondents were **aware** of what a custom DNS service was (unchanged from 2021 when it was first included). Of those who had accessed media content online in the past 3 months, 27% were aware of what a custom DNS was (also 27% last year); and

6% indicated that they had **used** a custom DNS service (broadly in line with 4% last year). Among respondents who had accessed media online content in the past 3 months, 8% had used a custom DNS (broadly in line with 5% last year).

Only a relatively small sample of respondents had used a custom DNS service, and care should be taken in extrapolating from the patterns of their responses. Of those who did, the most common reasons cited for using one were to improve the speed and/or reliability of communications and the internet experience (45%) or for the privacy and/or security of communications and internet usage details (43%). 40% did so because they like to be able to choose their own settings. However, 22% reported doing so to access content that is geoblocked in Australia, 12% to access content for a reasonable price, and 9% to be able to access free content.

Figure 39: Reasons for custom DNS usage

Base: Respondents who had used a custom DNS service

Service	2020 (n=0)	2021 (n=0)	2022 (n=145)
To improve the speed and/or reliability of my communications and internet experience	Not asked	Not asked	45%
For the privacy and/or security of my communications and internet usage details	Not asked	Not asked	43%
Because I like to be able to choose my own settings	Not asked	Not asked	40%
To access content from other countries that is geoblocked in Australia	Not asked	Not asked	22%
To apply parental controls to my or my family's communications and internet usage	Not asked	Not asked	19%
To access content for a reasonable price	Not asked	Not asked	12%
I was prompted to do so by a company or service that I use	Not asked	Not asked	11%
To access free content	Not asked	Not asked	9%
Other	Not asked	Not asked	4%

Q53a. Why have you used a custom DNS service? (Multiple response)

Additional analysis found that collectively, a little under two fifths (38%) of those who had used a custom DNS service indicated they had done so for at least one reason related to accessing content, including accessing content for free, accessing content at a reasonable price, and accessing content unavailable in Australia. Small sample sizes did not allow for further investigation into differences by demographics between those who used custom DNS for content-access reasons compared to those who used custom DNS for other reasons.

As with VPN use, infringers were more likely to have used a custom DNS service compared to non-infringers (13% compared to 5%), and two thirds of those who had used a custom DNS were classified as infringers overall. Among the small group who had used a custom DNS service, infringers and non-infringers both indicated having used a custom DNS service (at some point in time) to access content potentially unlawfully at similar rates[29]. This included seeking to access content at a reasonable price (11% of infringers compared to 15% of non-infringers) and to access content unavailable in Australia (25% of infringers compared to 21% of non-infringers). Infringers who used custom DNS service were more likely to say they used the service to apply parental controls (26% of infringers compared to 5%), that they were prompted to do so by a company or service they use (17% compared to 2%), and to access *free* media content (15% compared to 1%). Meanwhile, non-infringers were more likely to indicate they used custom DNS for privacy and security of communications (51% of non-infringers compared to 38% of infringers).

Broadly, the profile of those who had used custom DNS aligned closely with infringers in general. Compared to those who accessed content online in the three months but did not use a custom DNS service, custom DNS users were more likely to be younger (aged 12-34, 53% of custom DNS users compared to 41% of those who did not use custom DNS), male (71% compared to 50%), employed

[29] While classification of respondents as infringers or non-infringers was based on their reported consumption behaviours in the past three months, survey questions about custom DNS use (like VPN use) were not time-limited, but rather related to whether the respondent had ever used such a service, and if so, why. This is one reason why respondents classified as non-infringers may have reported having used custom DNS services at some point in time to access content in potentially unlawful ways.

full-time (69% compared to 57%), to access a greater range of content online (i.e. more likely to access every / all content categories compared to those who didn't use custom DNS) and to access that content in at least some ways that are unlawful (i.e. they are more likely to be infringers – 62% compared to 37%). Specifically, those who used custom DNS were more likely to say they had accessed content online using most of the unlawful methods listed in the survey, including by:

- Paying a small fee to access one or more subscription services through a shared or unknown account (31% compared to 15%);
- Stream ripping (23% compared to 8%);
- Using BitTorrent or similar peer-to-peer services (18% compared to 7%);
- Using cyberlockers or other file hosting websites (18% compared to 6%); and
- Websites that enable viewing of full-length content for free (17% compared to 10%).

Only minorities of respondents had used a VPN (25%) or a custom DNS service (6%). Fewer still (5%) had used both. Compared to the overall proportion of infringers in the survey (39%), somewhat higher proportions of those who used a VPN (51%) or a custom DNS service (62%) were infringers. However, those who used both were no more likely to be classified as an infringer (58%).

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:

17% of respondents had **encountered a blocked website** in the past 3 months (up from 11% in 2021 and 12% in 2020); 67% had not encountered such a site (down from 74% last year and 76% in 2020), and 16% were unsure (in line with 15% last year, and 12% in 2020).[30]

Compared to those who hadn't encountered a blocked site, respondents who did were more likely to be younger (aged 12-34, 52% compared to 34%), male (57% compared to 48%), and be employed full time (64% compared to 53%) or unemployed (13% compared to 9%). They were also more likely to consume any / all content types online, and to do so in unlawful ways (i.e. they were more likely to be infringers – 58% compared to 35%). Specifically, when it came to accessing content online, respondents who encountered blocked sites were more likely to say they pay a small fee to access one or more subscription services via shared or unknown credentials (30% compared to 13%), access content using stream ripping software (20% compared to 7%), through websites that enable them to access full-length content for free (20% compared to 8%), and via BitTorrent or similar peer-to-peer sharing services (15% compared to 6%), as well as most other unlawful ways of accessing content. Further, they were also more likely to have used VPN services (44% compared to 20%) and custom DNS (15% compared to 5%).

Figure 40 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 (60%, in line with 59% in both

[30] Q54. In the past 3 months, have you encountered a blocked website? (n=2,400 in 2022, n=2,392 in 2021, and n=2,421 in 2020).

2020 and 2021) and 14% indicated that they had sought alternative lawful access, 16% indicated that they had bypassed the blocked website (similar to 13% in 2021 and 12% in 2020). 8% acknowledged that they sought alternative but explicitly unlawful access (similar to previous years).

Figure 40: Actions taken when encountering a blocked website

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

Service	2020 (n=285)	2021 (n=274)	2022 (n=410)
I simply gave up	59%	59%	60%
I bypassed the blocked website	12%	13%	16%
I sought alternative lawful access	21%	18%	14%
I sought alternative free but unlawful access	6%	5%	6%
I sought alternative paid for but unlawful access	2%	1%	2%
Other	2%	4%	1%

Q57. Which of the following best describes what you did when you encountered a blocked website?

Among those few who had bypassed the blocked website (16% of those who encountered a blocked site, 3% of all respondents):

46% did so using a VPN, 24% used a proxy website, 18% used a search engine to find an alternative site, and 15% used Google Translate (something not reported in 2021).[31]

Those who had not encountered a blocked website in the past 3 months (67%) were also 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%, consistent over time), and 22% reported that they would seek alternative lawful access (also largely consistent over time).[32]

When asked what they might go about bypassing a blocked site if they had wanted to do so, the majority indicated that they would use a search engine to find an alternative site (54%), use a VPN (37%) or using proxy websites (21%). These responses have all been consistently reported over the past three years.[33]

Reflecting results from previous years, respondents who had accessed any online content in unlawful ways (infringers) were:

- more likely than non-infringers to have encountered a blocked website in the past 3 months (28% versus 13%; in line with 22% versus 8% in 2021, and 21% versus 8% in 2020);

[31] Q56. Please indicate how you went about bypassing the blocked website. (Multiple response; n=52). Due to low sample sizes, no significant differences were found year on year.
[32] Q57. What would you do if you encountered a website which had been blocked? (Multiple response; n=1,990).
[33] Q58. Please indicate how you would go about bypassing the blocked website. (Multiple response; n=148).

- less likely to have simply given up upon encountering a blocked website (50% versus 72%, similar to 41% versus 77% in 2021; and 47% versus 71% in 2020); and
- more likely to have in fact bypassed the blocked site they encountered (20% versus 10%, compared to 19% versus 5% in 2021, and 12% versus 10% in 2020).

Among those who **had not** encountered a blocked site in the past 3 months, in the event that they were to do so and wished to bypass the block, infringers were more likely to indicate that they would use a range of means to do so compared to non-infringers. This included:

- Using VPN (58% compared to 30%, with similar results in previous years);
- Using proxy websites (39% compared to 15%, with similar results last year);
- Using Google Translate (36% compared to 16%, this choice increased in incidence among both infringers and non-infringers over the past three years – 16% compared to 7% in 2021, 9% compared to 8% in 2020);
- Changing the network proxy in browsers (31% compared to 0%, increasing in incidence among infringers from 16% in 2021 and 13% in 2020); and
- Using IP rather than URL (22% compared to 5%, largely similar over time).

Password sharing for subscription services

With the proliferation of subscription services, the sharing of passwords or login credentials has become a growing area of concern for some content producers in recent years. The 2022 survey included some questions about these behaviours for the first time to shed some light on the prevalence of potentially unlawful password / credential sharing behaviours.

NOTE: When interpreting the results presented in this section, it is important to note that credentials-sharing is a rapidly evolving area. At this time there appears to be significant variability across the sector in terms of what is considered lawful or unlawful, depending on the terms and conditions stipulated by individual service providers or subscription services (which may be subject to change). As such, it is not possible to accurately determine the lawfulness of the behaviours described below. However, these results do provide some insight into the current landscape and consumer behaviours.

56% of all respondents **used a paid subscription service to access at least one media content type online** in the past 3 months (77% of respondents who accessed any media content online in the past 3 months).[34]

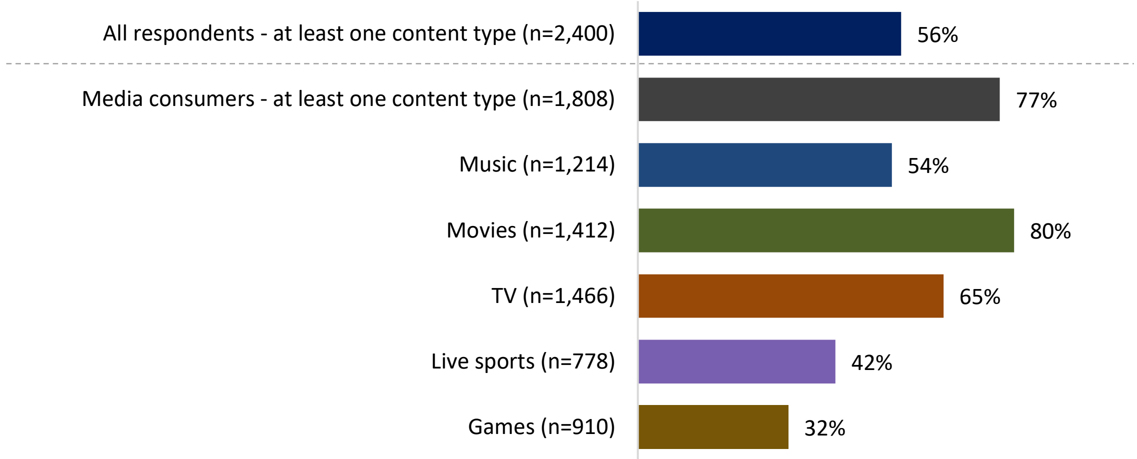
74% of all respondents **who used a paid subscription service** to access at least one media type online in the past 3 months **personally paid for at least one of the subscription services they used**.[35]

33% of all respondents **who personally pay for a subscription service they use allowed someone outside of their household to use their login details to access** subscription services relevant to at least one content type.[36] This result is higher than the proportion of respondents who reported that someone outside of their household pays for their subscription service (see Table 42), though it is not clear why this is the case.

[34] Q72. Q14/22/29/37/43. Which of the following ways have you used to download / stream / access [content type] online in the past 3 months – a paid [content] subscription service? (n=2,400 in 2022).
[35] Q17ai/Q24ai/Q31ai/Q38ai/Q45ai. Which of these best describe the paid subscription service(s) you use to access [content type]? (n=1,808 in 2022).
[36] Q72. In the last 3 months, have you allowed someone outside of your household to access your account with a paid subscription service for: Music / TV or movies / Live sports / Video Games / none of these? (n=2,400 in 2022).

Figure 41: Proportion of respondents who used subscription services to access content online in the past 3 months (2022)

Base: Respondents who accessed paid subscription services for a given content type (base size varies by content type)



Q14/22/29/37/43. Which of the following ways have you used to download / stream / access [content type] online in the past 3 months – a paid [content] subscription service?

Table 42: Access to paid subscription services in 2022

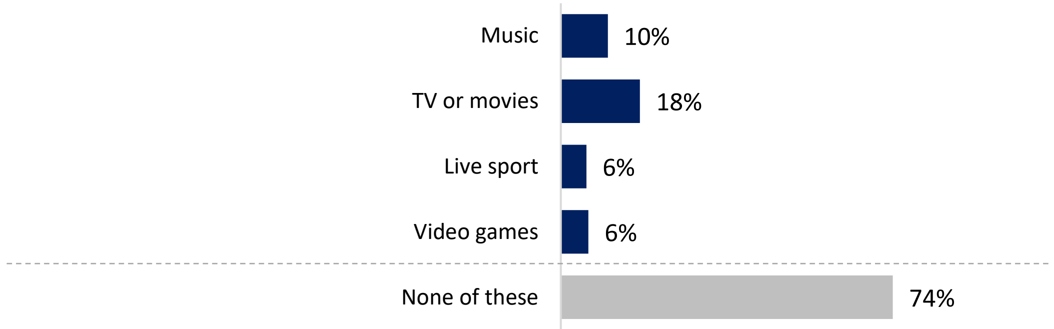
Base: Cohorts below comprise respondents who used a subscription service to access a given content type (base size varies by content type)

	All respondents (n=2,400)	Accessed paid subscription in the past 3 months:					
		At least one media type subscription service (n=1,402)	**Music** subscription services (n=661)	**Movie / Film** subscription services (n=1,114)	**TV content** subscription services (n=993)	**Live sport** subscription services (n=316)	**Video game** subscription services (n=276)
Personally pay for service	**38%**	74%	72%	68%	69%	72%	70%
Someone else in the household pays			25%	25%	26%	24%	28%
Someone outside the household pays			3%	6%	5%	4%	2%
Not sure who pays			0%	0%	1%	0%	1%

Q17ai/Q24ai/Q31ai/Q38ai/Q45ai. Which of these best describes the paid subscription service(s) you use to access [content type]?

Figure 43: Proportion of respondents who shared their login credentials for content subscriptions with others outside their household in 2022

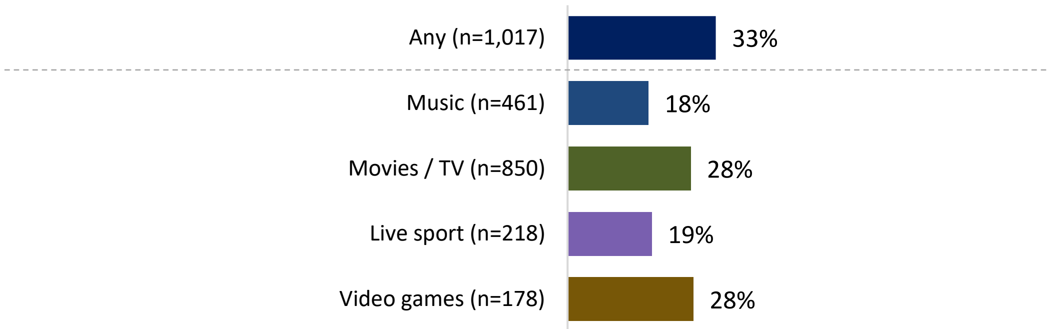
Base: All respondents (n=2,400)



Q72. In the last 3 months, have you allowed someone outside of your household to access your account with a paid subscription service for: Music / TV or movies / Live sports / Video Games / None of these? (Multiple response)

Figure 44: Proportion of respondents who shared their personally paid for subscription service with others outside their household in 2022

Base size: Cohorts below comprise respondents who personally paid for subscription services they accessed for a given content type (base size varies by content type)



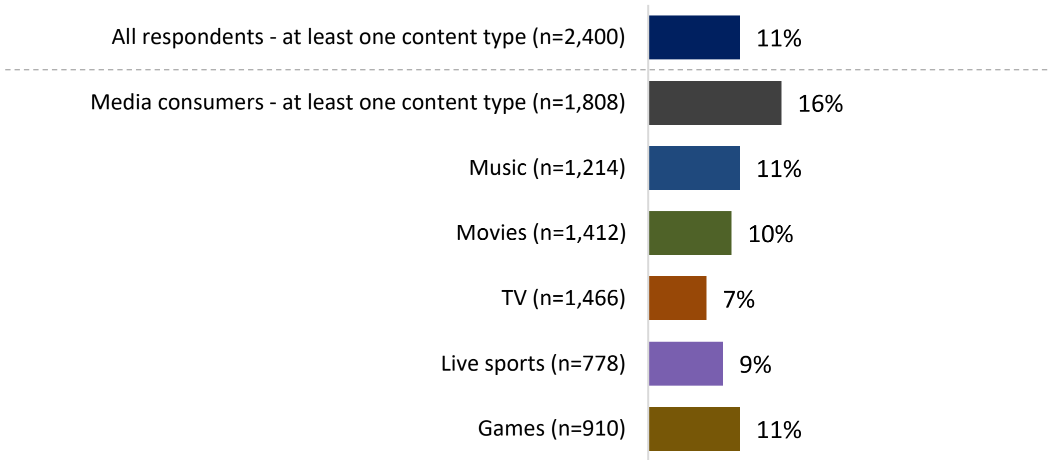
Q72. In the last 3 months, have you allowed someone outside of your household to access your account with a paid subscription service for: Music / TV or movies / Live sports / Video Games / None of these? (Multiple response)

11% of all respondents **paid a small fee to access one or many subscription services through a shared / unknown account** (for example, shared login credentials).[37] This also represents 16% of all those respondents who streamed / accessed or downloaded media online in the past 3 months.

[37] Q14/22/29/37/43. Which of the following ways have you used to download / stream / access [content type] online in the past 3 months – paying a small fee to access one or many subscription services through a shared / unknown account (e.g. shared login credentials)? (n=2,400 in 2022)

Figure 45: Proportion of respondents who paid a small fee to access one or more subscription services through a shared / unknown account (for example, shared login credentials) in 2022

Base: All respondents who accessed a given content type



Q14/22/29/37/43. Which of the following ways have you used to download / stream / access [content type] online in the past 3 months – paying a small fee to access one or many subcription services through a shared / unknown account (e.g. shared login credentials)?

The inclusion of this *probably unlawful*-classified access method for all content types[38] has had a notable impact on the 2022 survey's findings on the apparent rate of unlawful consumption, as discussed on page 5 and elsewhere. However, it is not possible to extract any further detail from the survey data on the specific behaviours that led respondents to indicate that they had paid a small fee to access one or more subscription services through a shared / unknown account (for example, who respondents were paying and how).

24% of all respondents had engaged in **some kind of account sharing activity**, including either allowing someone outside of their household to access their paid subscription service account, using shared login credentials to access at least one type of online content, or both.

Profiles of account sharers and users of shared accounts are presented in the following tables. While the demographic profiles of these groups were broadly similar, only a third of respondents who had engaged in some kind of account sharing were both account sharers and shared account users (33%).

[38] Rather than just video games, as in 2020 and 2021.

Table 46: Profile of account sharers versus non-sharers

74% Non-sharers (did not share access to a paid subscription service account)	26% Account sharers (shared access to at least one paid subscription service account)
Base: Respondents who had not shared account access (n=1,772)	Base: Respondents who had shared account access (n=628)
Compared to account sharers, non-sharers were more likely to be:	Compared to non-sharers, account sharers were more likely to be:
Aged 45 years and over (58%) *(18%)^*	Aged 12 to 44 years (82%) *(42%)^*
Female (54%) *(42%)*	Male (56%) *(46%)*
Household income of less than $40,000 (30%) *(19%)*	Household income of more than $80,000 (44%) *(35%)*
Retired (25%) *(4%)*	Working full-time (42%) *(25%)* or part-time / casual (26%) *(18%)*

^Results in coloured italics and brackets indicate the account sharer (grey) or non-sharer (blue) result for comparison.

Table 47: Profile of shared account users compared to non-users

84% Non-user (did not use shared login credentials to access online content)	16% Shared account user (used shared login credentials to access online content)
Base: Respondents who had not used a share account (n=1,498)	Base: Respondents who had used a share account (n=295)
Compared to shared account users, non-users were more likely to be:	Compared to non-users, shared account users were more likely to be:
Aged 45 years and over (46%) *(10%)^*	Aged 12 to 34 years (75%) *(35%)^*
Female (50%) *(34%)*	Male (65%) *(49%)*
Household income of $40,000-$80,000 (32%) *(22%)*	Household income of more than $80,000 (52%) *(40%)*
Retired (16%) *(2%)*	Working full-time (43%) *(31%),* part-time (18%) *(13%)* or student (25%) *(11%)*

^Results in coloured italics and brackets indicate the shared account user (grey) or non-user (blue) result for comparison.

Part 3: Factors Affecting Lawful Consumption

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.

Change in methods

Respondents who indicated they were **using at least one method to consume online content much more** or **much less** were asked to describe why. Comments relating to each content area were aggregated and analysed at an overall level. The reasons provided were broadly consistent with those reported last year.

Those who indicated they were using a particular method **more** (n=1,092) primarily indicated that this was because:

- it was convenient, easy, reliable, accessible or faster in general (19%);
- they currently had more time for the content, more time at home, or were going out less, for example, due to COVID-19 (15%); and
- they were generally engaging with the content more / were more interested in the content (8%).

Among respondents who were using a particular method **less** (n=429 total), the most common reasons were:

- not having enough time to use it / being too busy to use it; for example, no longer working from home (17%);
- lower interest in the content; for example, not really watching, playing or listening to the content, or being more interested in other things (17%); and
- other methods being easier, better or faster (10%).

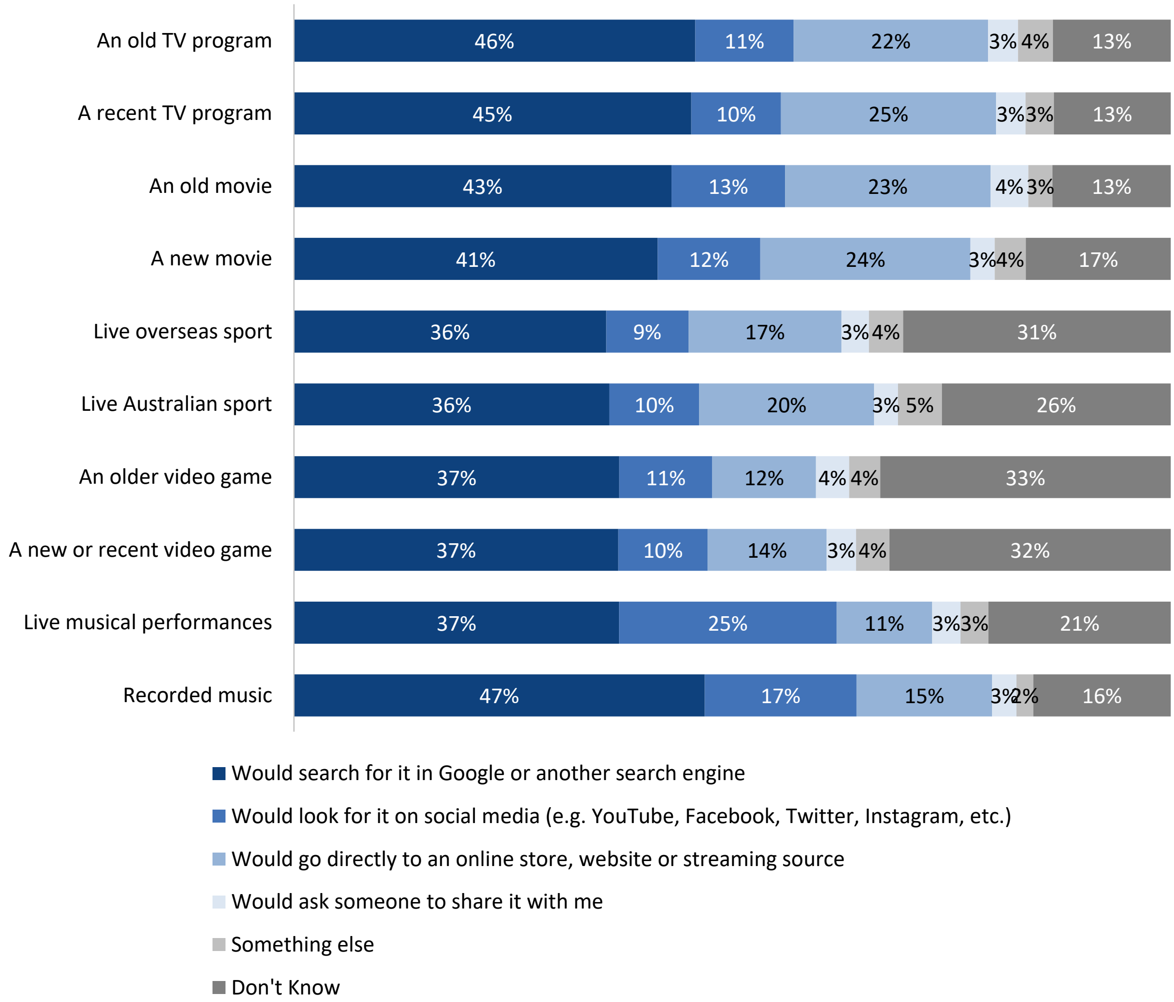
Access to new content

When asked how they might **first go about trying to find new content**, the most common method reported by respondents was via a Google search (or search via another search engine – see Figure 48). This was the case regardless of content type, and was consistent with the findings from 2020, and 2021 (36%-47% said they would use this method across content types, versus 36%-52% in the previous two years).

As was the case in previous two surveys, a notable proportion (13%-33%) also indicated that they 'don't know' how they would find new content, particularly in relation to video games and sports – likely reflecting the lower general consumption and familiarity with these content areas.

Figure 48: Ways to go about finding new content not previously accessed (TV / movie / film content)

Base: All respondents (n=2,400)



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?

Access to unlawful content

Much of the content that Australians can access online is lawful. Despite this, individuals may come across unlawful content online even without actively seeking it.

Confidence

Overall, most respondents were confident that they would be able to identify whether online content was lawful or unlawful. Figure 49 illustrates that this level of confidence has remained relatively stable since 2020, across the various content types.

Overall, 32%-45% were very confident in their ability to identify the lawfulness of each content type (compared to 34%-47% in 2020 and 31%-42% in 2021). Furthermore, 48% of respondents said they were very confident in knowing if at least one of the presented options was lawful or unlawful online (compared to 44% in 2021 and 48% in 2020).

Figure 49: Confidence in identifying what content is lawful or unlawful online

(% Very Confident + % Quite Confident)

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

Content type	2020 (n=380-1,490)	2021 (302-1,399)	2022 (n=385-1,460)	Very confident	Quite confident
Live sport	89%	86%	87%	45%	42%
Movies / films or TV programs you can stream or view live	86%	84%	86%	38%	48%
Music you can stream or view live	85%	85%	83%	38%	45%
Video games you can play online	86%	84%	83%	40%	43%
Video games you can download and save	86%	84%	82%	42%	40%
Music you can download and save	84%	80%	82%	37%	45%
Movies / films or TV programs you can download and save	81%	81%	78%	32%	46%

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

Overall, while respondents remain reasonably confident they could identify lawful and unlawful content, there was a decline in the proportion of respondents who would be concerned if they accessed online content unlawfully, versus 2020 and 2021.

Figure 50 shows that 57%-63% of respondents reported they would be concerned if they were to access online content unlawfully across the various content types (‘very’ or ‘quite’ concerned, versus 64%-71% in 2020 and 64%-68% in 2021). Furthermore, only 35% of respondents said they would be very concerned if they accessed at least one of the content types unlawfully (down from 38% in 2021 and 40% in 2020).

Respondents were particularly less likely to be concerned if they if they unlawfully accessed live sport or video games you can download and save, compared to 2021 (see Figure 50).

Figure 50: Concern if accessed unlawful content online

Base: Respondents who had consumed each content type online in the past 3 months (% Very concerned + % Quite concerned)

Content type	2020 (n=391-1,487)	2021 (273-1,370)	2022 (n=376-1,425)	Very concerned	Quite concerned
Movies / films or TV programs you can stream or view live	69%	68%	63%	28%	35%
Music you can download and save	71%	66%	63%	29%	34%
Movies / films or TV programs you can download and save	64%	67%	62%	28%	34%
Video games you can play online	69%	67%	61%	27%	34%
Music you can stream or view live	67%	64%	59%	25%	34%
Live sport	68%	67%	58%	26%	32%
Video games you can download and save	66%	66%	57%	28%	29%

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

Respondents who indicated 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 as follows:

64% I don't think that it's right (versus 67% in 2020 and 68% in 2021)[39]

56% Files may have viruses / malware / spyware (versus 62% in 2020 and 58% in 2021)

47% I want to support creators / industry (versus 50% in 2020 and 45% in 2021)

44% I might be caught / punished (versus 43% in 2020 and 41% in 2021)

[39] Q63. Why would you be concerned about accessing such content unlawfully? (n=572).

Behaviour change

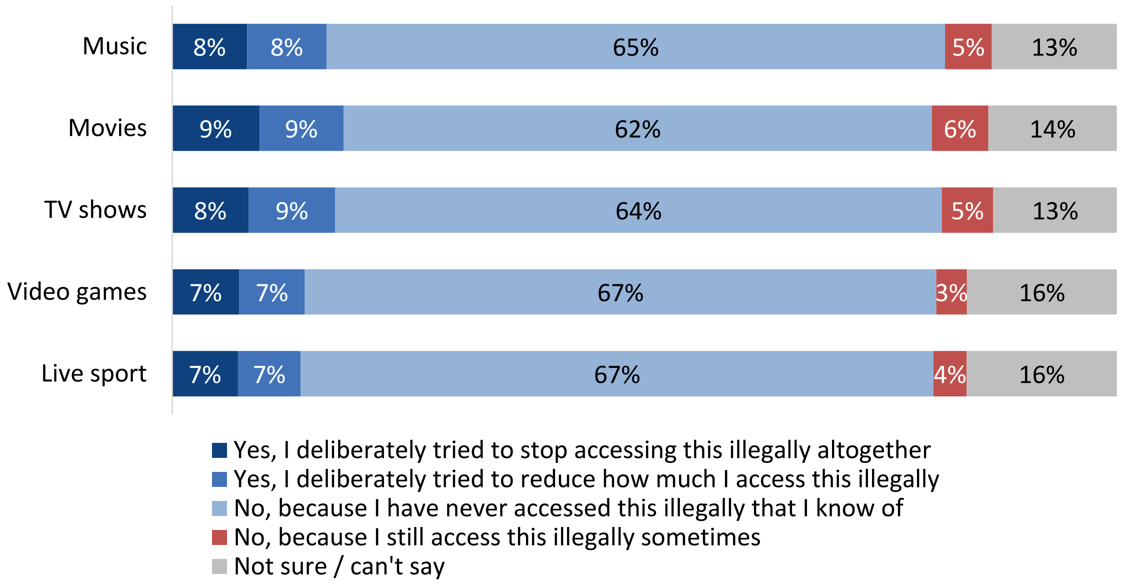
In order to explore changes in behaviour over time, respondents were asked about whether they had made a conscious decision in the past 5 years to reduce or stop accessing various content types online in ways that they thought might be unlawful.

As was the case in previous years, the results were similar across content types. Figure 51 illustrates that 62%-67% of respondents indicated that they had **not** made such a decision as they had never accessed content unlawfully that they know of.

As was also reported in 2020 and 2021, a minority did claim to have deliberately tried to reduce or stop accessing each content type unlawfully (14%-18%, up from 9%- 13% in 2021 and 11%-16% in 2020). The proportion of respondents who acknowledged that they know they access content unlawfully but have not made a conscious decision to change sometimes remained low (3%-5%, versus 3%-6% in the past two years).

Figure 51: Behaviour change in relation to accessing content that might be unlawful

Base: All respondents (n=2,400)



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?

Respondents who deliberately tried to reduce or stop accessing content unlawfully were asked to explain what prompted this decision. The most frequently cited reasons were consistent with last year, and included:

- being concerned about the legality or getting caught (24%);
- feeling guilty, or that it was unethical or morally wrong (17%);
- the content they wanted was available legally (for example, free or for a reasonable price), or they were able or happy to pay for legal content (12%);
- wanting to pay to support artists / the industry (9%); and
- feeling concerned about online security, viruses, or scams (9%).

Perceptions of lawfulness

Perceptions of lawfulness were assessed by asking respondents to rate how likely they felt it was that a range of activities were lawful in Australia.

After a reduction in perceptions of lawfulness across some activities in 2021 (versus the previous year- see Figure overleaf), current perceptions were more similar to those reported in 2020. The following activities were most likely to be perceived to be lawful (as was the case in 2020 and 2021): paying for content through an online store; using a set-top box that lets you access Australian TV and the internet; and paying a small fee to watch a live stream on social media put up by the original artist.

Respondents were particularly unsure about whether the following was unlawful: the use of a video games emulator, using a set-top box that lets you access overseas TV channels, and selling an account in a video game to someone else (consistent with 2020 and 2021 results).

As in previous years, the 2022 results show that respondents do not have a clear or common understanding of the likely lawfulness of many activities, despite their confidence that they can differentiate lawful and unlawful content.

Figure 52: Perceptions of lawfulness of different activities

Base: All respondents

Activity	2020 (n=2,421)	2021 (2,392)	2022 (n=2,400)	Very likely	Quite likely
Paying for content through an online store	72%	59%	69%	46%	23%
Using a set-top box that lets you access Australian TV and the internet	66%	58%	65%	41%	24%
Paying a small fee to watch a live stream on social media put up by the original artist	63%	53%	63%	38%	25%
Accessing content from a website that is free to use and that has a wide range of content types and styles available	62%	51%	59%	31%	28%
Letting someone watch or listen to something you paid for on your own device	58%	51%	57%	30%	27%
Using a set-top box that comes pre-loaded with content like TV programs, movies / films, music or games	52%	45%	50%	29%	22%
Using a set-top box that lets you access overseas TV channels	48%	37%	48%	26%	22%
Using free apps / services that can be accessed through app marketplaces (i.e. through mobile or a smart TV) to stream or download content without paying for it	-	39%	42%	20%	22%
Paying a small fee to watch a live stream on social media put up by someone other than the original artist	32%	26%	35%	15%	19%
Paying a small fee to access one or many subscription services through a shared / unknown account (e.g. shared login credentials)	-	-	31%	15%	16%
Password sharing allowing multiple individuals to access the same paid subscription account	29%	25%	30%	13%	18%
Using a video games emulator that lets you play lots of different games	26%	27%	30%	12%	18%
Uploading content you have paid for where other people can view or download it	26%	26%	28%	12%	16%
Sharing a copy of something online that you paid for with someone you know	28%	26%	29%	11%	18%
Selling an account in a video game to someone else	20%	17%	22%	9%	13%

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

ORIMA

Consistent with previous years, perceptions of the lawfulness of activities varied by certain demographic characteristics.

In general, more of those **aged between 12 and 24,** and **25 and 34** tend to think 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 sharing a copy of something that you paid for with someone you know, using a video game emulator or selling an account in a video game to someone else. 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 **those unemployed and students** were generally less likely than others to know (i.e. provide the right answer) whether or not most activities were likely to be lawful.

Familiarity with online terms

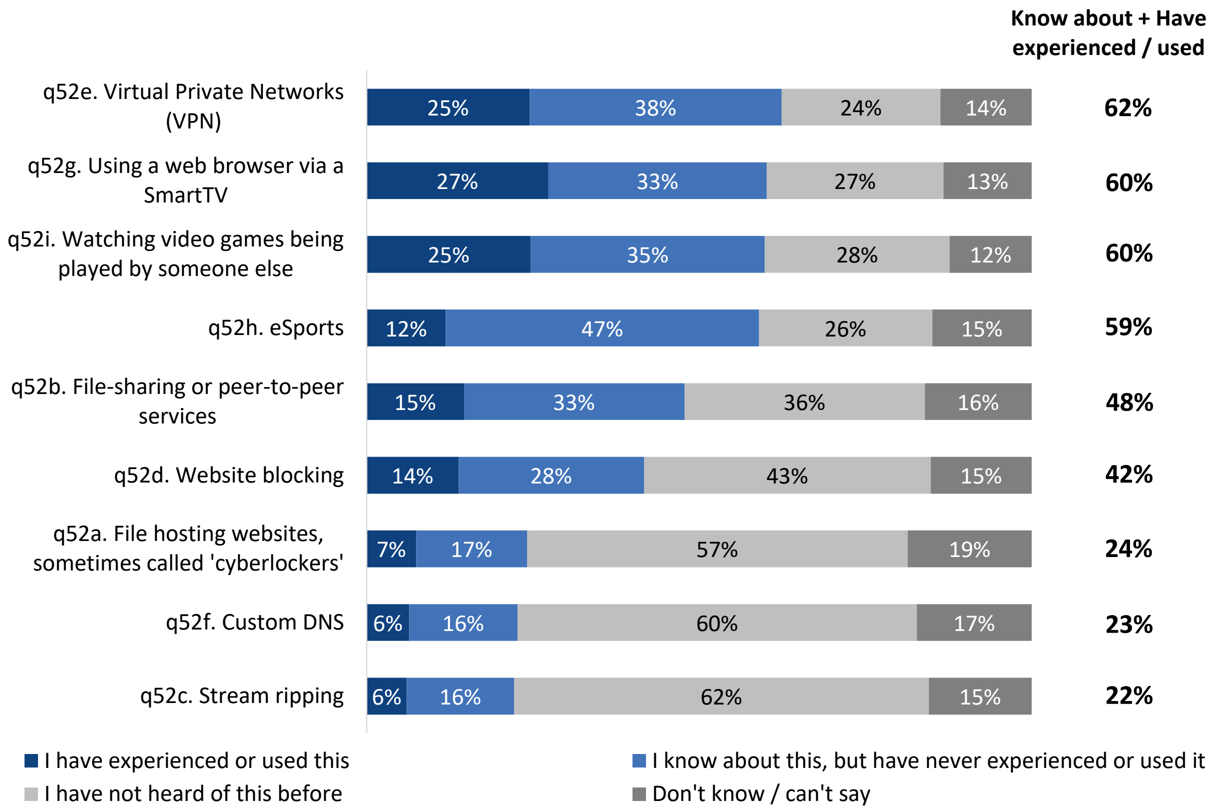
Familiarity with online terms was highly consistent with previous years.

As was the case in 2021, respondents were most familiar with Virtual Private Networks (VPNs), using a web browser via a smart TV, and watching video games being played by someone else (60%-62% had heard of these and 25%-27% had experienced or used these). A similar proportion of respondents had heard of eSports (59%), though fewer had personal experience with it (12% - see Figure 53).

In contrast, respondents were least familiar with file hosting websites (24% had heard of this), Custom DNS (23%) and stream ripping (22%). Only a minority of respondents had used or experienced these (6%-7%).

Figure 53: Familiarity with online terms, 2022

Base: All respondents (n=2,400)



Q52. How familiar are you with the following?

Familiarity with online terms varied by certain demographic characteristics (consistent with previous years).

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 have indicated that they know about all terms.

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 they thought might be unlawful when considering several factors (see Figure 54).

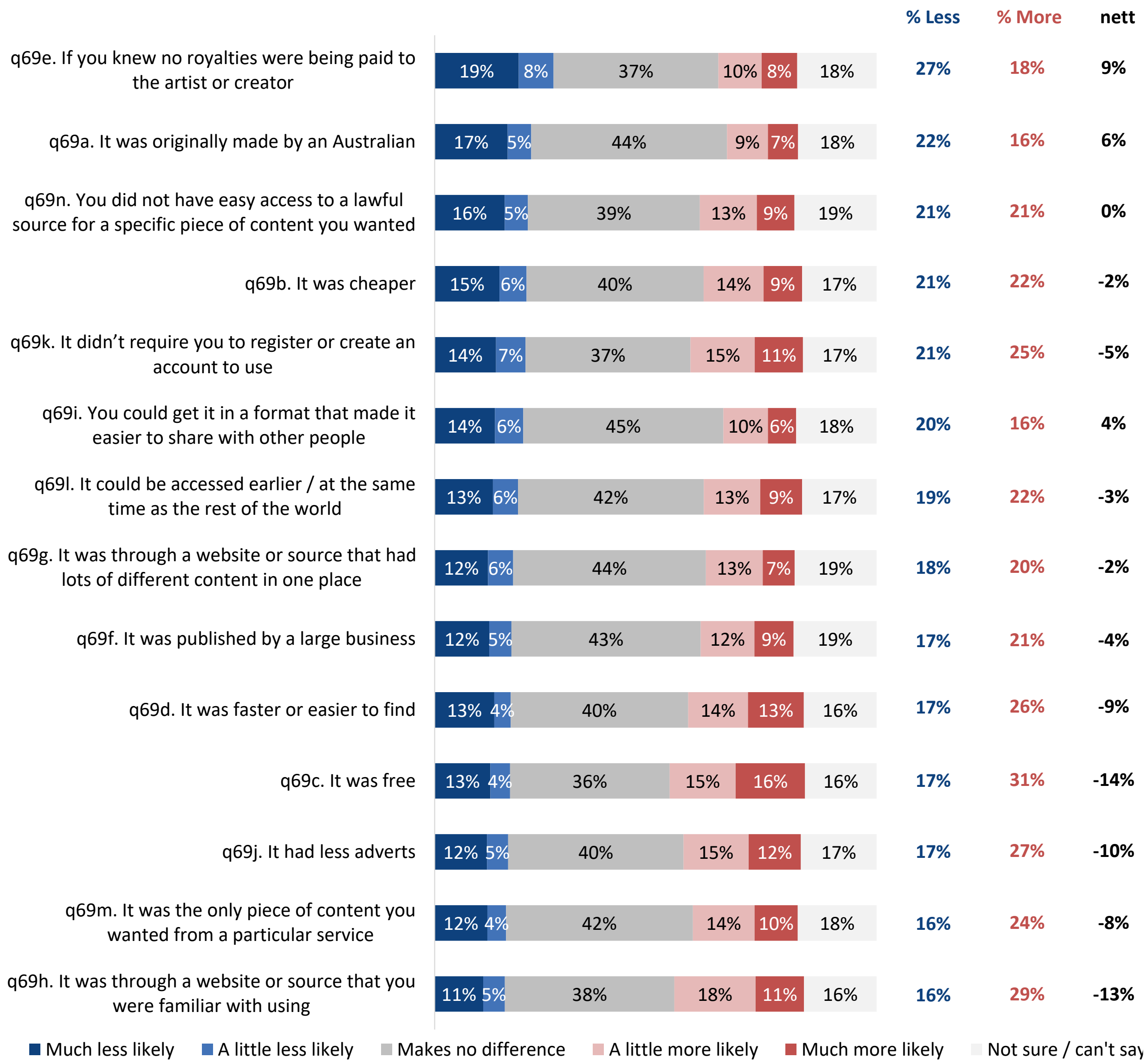
Consistent with previous years, many respondents (36%-45%) indicated that each factor would make no difference to their likelihood of accessing content online in unlawful ways; and notable proportions were also unsure (16%-19%).

The main factor respondents indicted would make them less likely to access content online unlawfully was if they knew no royalties were being paid to the artist or creator (27% in total said ‘less likely’); whilst they would be *more* likely to access content online unlawfully if it was free (31% ‘more’ or ‘a little more’ likely), or if it was through a website or source that they were familiar with using (29%).

There were no particularly noteworthy differences compared to the previous year’s results.

Figure 54: Likelihood of accessing content unlawfully under different circumstances

Base: All Respondents (n=2,400)



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

Again, consistent with previous years, likelihood of accessing online content unlawfully varied somewhat by certain demographic characteristics. As this question is hypothetical in nature, these patterns of responses are more suggestive of willingness to access content unlawfully than they are predictive of specific intentional behaviour changes. Unsurprisingly though, they align closely with characteristics of infringers seen throughout the survey.

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.

XII. Additional Topics and Exploration

The primary objective of the research is 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 additional factors and patterns that may be associated with lawful or unlawful consumption.

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

See page 5 for information about important modifications to the survey methodology. These changes may impact on lawful and unlawful consumption results in this section. The changes were made to make the survey more sensitive overall to some emerging methods of unlawful consumption.

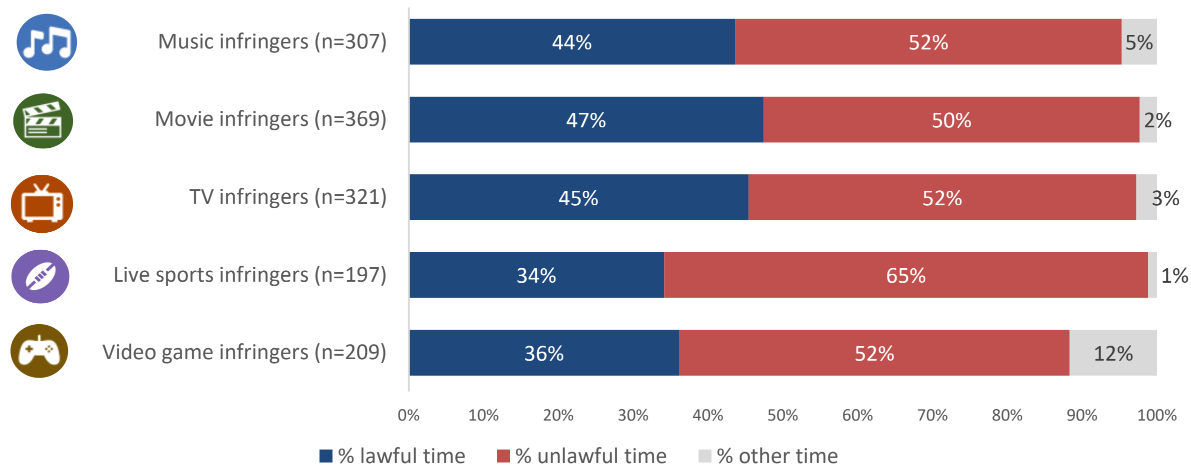
Lawfulness of time use among infringers

For the purpose of this report, infringers were classified as respondents who indicated they had accessed a given content type in at least one way that was considered probably unlawful. Across all content types, it has consistently been found that there is only a very small proportion of respondents who consume media in *exclusively* unlawful ways (<12% across media types).

As shown in Figure 55, even infringers were found to access music, movie, and TV content lawfully between 44-47% of the time, and around 34-36% of the time for live sports and video game content. These proportions all declined somewhat since last year, again likely at least in part due to the survey changes made in 2022 and the addition of extra unlawful categories that better enabled respondents to describe how they use their time when accessing media online. In 2021, infringers reported accessing music, movie, and TV content lawfully between 51-54% of the time, and live sport and video game content 42% of the time. For further details and discussion, please see page 5 and content specific analysis in the section relevant to each content area.

Figure 55: Lawfulness of time spent by infringers accessing media online, by media type, 2022

Base: Infringers of each content type



Q15/Q16/Q23/Q24/Q30/Q32/Q38/Q44. How is the way you download/stream/access [content type] typically split across the following? (Enter percentage of time for each option)

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

Up to this point in the report, lawful consumption of online content has been viewed as a simple 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 only did so in ways other than those listed were excluded from the categorisation). 72% of respondents consumed at least one of the five main content types online, and of these, 39% did so in at least one way that was likely to be unlawful (28% of all respondents) – while the other 61% of online consumers were classified as non-infringers (43%) of all respondents.

Given the increasing complexity of the online content landscape, an additional 'graduated lawfulness' categorisation was created in 2021 to provide a more nuanced view of consumption behaviours. This allows for clearer differentiation between those who consume content in ways that are only lawful those who use methods that are <u>potentially</u> unlawful, those who use methods that are <u>probably</u> unlawful most of the time, and those who do not consume content online at all (as well as the small proportion who only do so in ways other than those considered by this research). This is done by classifying unlawful methods of consumption as 'potentially unlawful' (for example, receiving the file(s) directly from someone else) or 'probably unlawful' (for example, a file hosting website or cyberlocker). This graduated categorisation of consumption lawfulness was retrospectively applied to 2020 data, and was again used in 2022 to show changes year on year.[40]

Overall

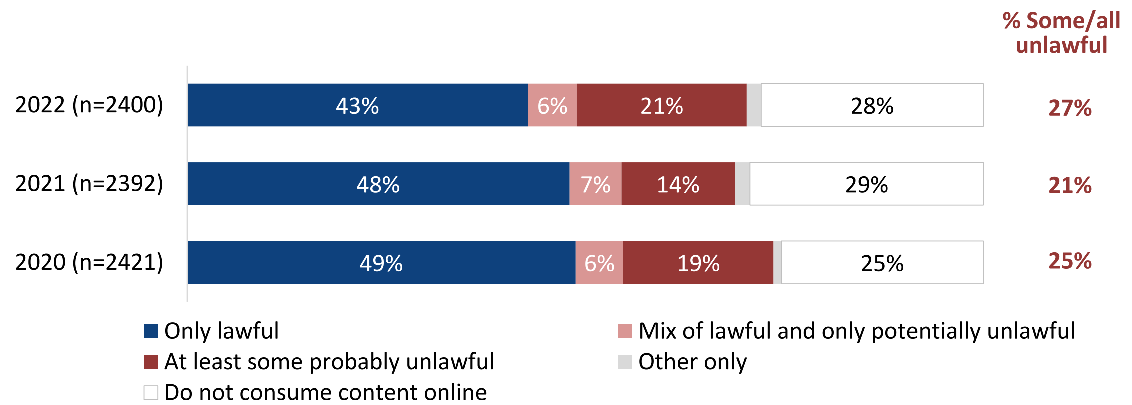
When considered in this more nuanced way (including those few whose only online consumption was classified as 'other'), the 43% of all 2022 respondents that consumed online content in only lawful ways can still be seen, but there is more detail in how the rest of the respondents can be broken down. 6% used a combination of lawful plus at least one *potentially* unlawful way to consume content, and 21% used at least one *probably* unlawful way. 28% did not consume any online content, and 2% used only ways that were not able to be classified.

While the broad breakdown is in line with 2020 and 2021, and likely in part due to the inclusion of additional consumption methods intended to detect unlawful consumption, there is a higher proportion classified as using at least one probably unlawful consumption method in 2022. Slightly fewer (43%) respondents are classified in 2022 as only lawful consumers of online content, compared to 48%-49% in 2020-21.

[40] The 2022 results are based on the five core content areas, in order to maintain comparability with previous years.

Figure 56: Graduated lawfulness of online content consumption, 2020-2022

Base: All respondents



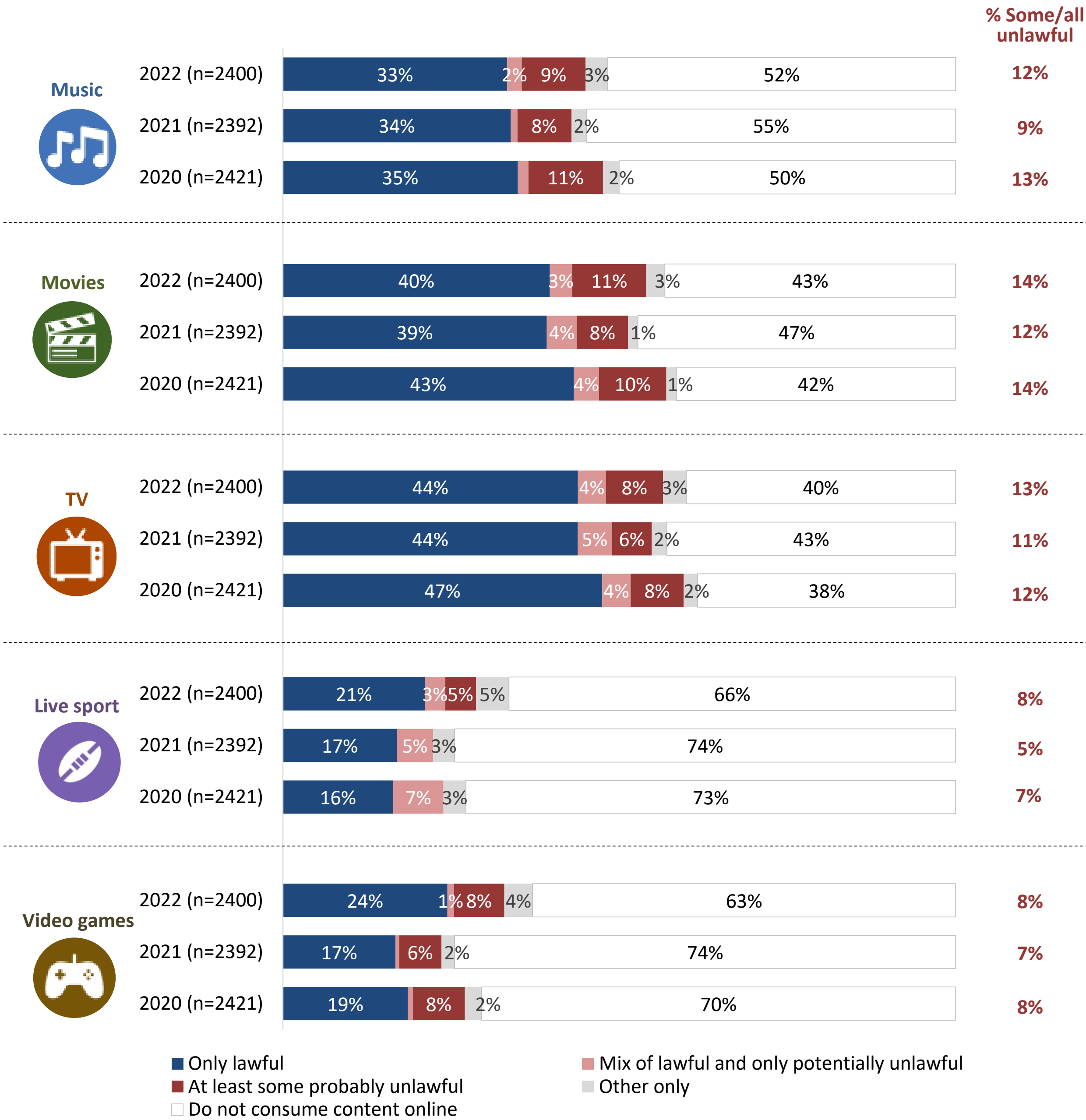
Q15/Q16/Q23/Q24/Q30/Q32/Q38/Q44. How is the way you download/stream/access [content type] typically split across the following? (Enter percentage of time for each option)

Media type

Breaking down graduated lawfulness for each media content type shows that the patterns *within* each type have not changed as substantially as the overall aggregate-content breakdown across years. This breakdown reinforces the earlier observation that the higher rate of infringement in the community observed in 2022 stems from a wider range of content areas being consumed, more so than an increase in unlawful consumption within any or all of the content types.

Figure 57: Graduated lawfulness of online content consumption, by media type, 2020-2022

Base: All respondents



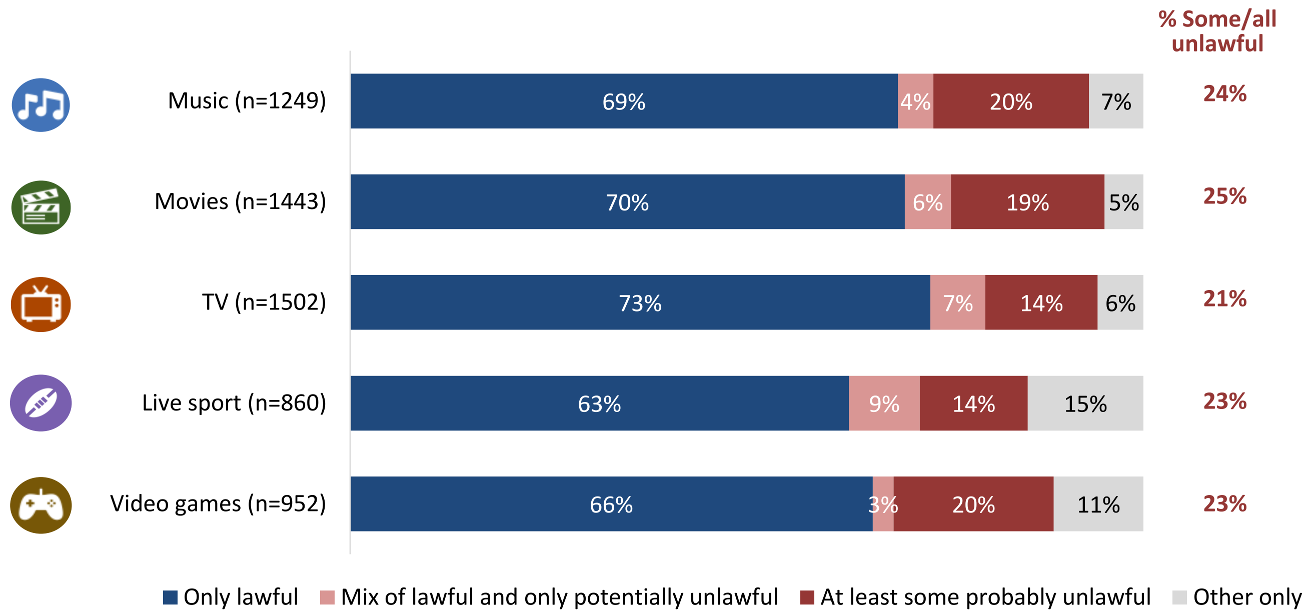
Q15/Q16/Q23/Q24/Q30/Q32/Q38/Q44. How is the way you download/stream/access [content type] typically split across the following? (Enter percentage of time for each option)

Lawfulness and media consumption behaviours

As was the case with the dichotomous classification of unlawful consumption, using the more nuanced graduated lawfulness classification found a similar level of unlawful consumption across each content type. For each of the five primary content area types, between 21%-25% of respondents who consumed that content type at all reported at least some consumption that was potentially or probably unlawful.

Figure 58: Graduated lawfulness of online content consumption, by media type, 2022

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



Q15/Q16/Q23/Q24/Q30/Q32/Q38/Q44. How is the way you download/stream/access [content type] typically split across the following? (Enter percentage of time for each option)

Technical appendix

2022 Project development and changes.

The Consumer Survey on Online Copyright Infringement has been conducted annually since 2015. A major update to the survey content and reporting was conducted in 2020. This update changed the fundamental method of calculating the key lawfulness indicators from the survey, and meant that readers needed to use caution in directly comparing the post-2020 results with the 2015-19 results. The 2022 survey is the third using the new survey methodology. Where is it possible to track results back to the 2015-19 data, throughout this report a dotted line is used in the charts to indicate the change of methodology.

In 2022 a necessary but substantive revision was made within the new survey methodology. Due to the increasing range of brands and consumption methods seen across content types, the comprehensive lists that needed to be shown to respondents had become too long to be practical in some places. As this is expected to only continue to grow in future years, the decision was made in the 2022 survey finalisation stage to update the way of obtaining information about consumption methods, channels and volumes. This change included adding in a small number of new methods of consumption, or extending existing ones across all content types. This change does not affect the reporting of the results, but does affect how the data is collected, and how key unlawfulness indicators are calculated.

One of the expected consequences of adding in these additional methods of primarily unlawful consumption was that the survey would likely have greater sensitivity to detect unlawful consumption – thus potentially contributing to an increase in the proportion of respondents reporting unlawful consumption. It was deliberately decided that there was greater value in this increased sensitivity to unlawful consumption than there was in retaining continuity of the data if that data was considered to be less accurate than it could be. These expected patterns of responses were seen in the 2022 survey results.

The revised approach to measuring consumption methods has been designed to be more adaptable to ongoing changes and expansions in options for consumers in future years. This modified approach adopted in 2022 will be continued in future years. For details on the changes made to the survey, please refer to chapter II.

Comparisons to pre-2020 results

Throughout this report most results have focused directly on comparisons between the 2020-2022 data, with 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 later results from those that have come from previous surveys.

Data collection method and timing

Since 2020 the data has been collected through a purely online survey. Sampling was designed to mirror the national population to capture a representative sample. In 2022 the survey ran from 24/6/22 – 14/7/22 and asked respondents to consider their online activity over the previous three months (approximately April to June). The 2020 survey was conducted at a similar timing, but all other surveys (including 2021) were conducted around April, and asked respondents to reflect on the January to March timeframe. This may impact the levels and types of activities undertaken online (i.e. due to weather, live sport seasons, etc.).

COVID-19 Pandemic

The 2020, 2021 and 2022 surveys have all been conducted during periods that were affected by the COVID-19 pandemic. It is hypothesised that some of the changes in overall and lawful consumption across these surveys may have been in part impacted by temporary changes associated with COVID-19, such as lockdowns and reductions in live sport. Readers should consider these impacts when interpreting the survey results.

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 or 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 2020 questionnaire redesign phase, it was recommended that asking respondents to estimate the number of hours they had spent downloading or 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 on 24/6/22 to both assess the suitability of survey design and content and test the online system and survey length. A total of n=220 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 the evening of 24/6/22 and 14/7/22, with the target audience being all internet users aged 12+ in Australia. Overall, a total of n=2,400 individuals participated. Of these:

- n=350 were aged 12 – 17 years of age; and
- n=2,050 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

Consistent with the 2020 and 2021 waves of research, the target audience for the 2022 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 27 outlines the target response numbers compared to final achieved figures.

Table 27: Target and achieved sample, 2022

Age	Target	Achieved
12-15 years	174	176
16-24 years	366	364
25-34 years	408	407
35-44 years	444	441
45–54 years	408	406
55-64 years	324	326
65 and older	276	280

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). References throughout the report to '%' increases or decreases are percentage points.

Statistical precision

Table 28 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 28: Indicative confidence intervals – 95% confidence level

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

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).

Appendix – Additional results

Average proportion of time spent on methods by infringer status

By definition, non-infringers used only the relatively few consumption methods that were classified as lawful, while infringers used a wider range of both lawful and unlawful methods. The following tables break down the proportions of time that the two groups spent across relevant consumption methods for streaming and / or downloading each content type.

Because it was spread across more methods, the total proportion of time infringers used with any given method was smaller, for both lawful and unlawful methods. For each content type, infringers tended to report that most of their time was spent using one or two more common methods, but a small proportion of their total time tended to be spread across many different methods.

For music, movies / films and TV, infringers estimated that 11%-22% of their streaming time and 56%-58% of their downloading time was using unlawful methods. For these content types, infringers spent much higher proportions of time on unlawful methods when downloading compared to when streaming, whilst the majority of their streaming time was still spent on lawful consumption methods. The patterns were somewhat different for video games (downloading or accessing) and live sport (streaming) – where 26% and 33% of time respectively were spent on unlawful methods (and 67% and 63% respectively on lawful methods).

Several unlawful methods were most commonly used by infringers across different content areas:

- Paying a small fee to access subscription services through a shared / unknown account:
  - Most common when streaming for all content types;
  - Most common when downloading or accessing video games;
  - Second most common when downloading music, movies / films and TV programs;
- BitTorrent or another file-sharing or peer-to-peer service:
  - Most common when downloading movies / films and TV programs;
- Through apps / services that you do not have a paid subscription to, but can be accessed through app marketplaces:
  - Second most common when streaming movies / films or TV programs; and
- Using an online converter or ‘stream ripping’ software:
  - Most common when downloading music.

Table 29: Average proportion of time spent streaming music, by infringer status

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

Source	2020		2021		2022	
	Non-infringer (n=657)	Infringer (n=384)	Non-infringer (n=644)	Infringer (n=321)	Non-infringer (n=592)	Infringer (n=431)
Lawful sources	**97%**	**92%**	**97%**	**94%**	**96%**	**84%**
A paid for subscription service (e.g. Spotify Premium, Apple Music, YouTube Premium)*	36%	25%	38%	29%	51%	35%
Free version of a streaming / download service that has a premium tier (e.g. Spotify, YouTube)*	26%	25%	27%	22%	34%	32%
Listening to the radio online (via websites or apps) either live or through catchup services	6%	9%	6%	11%	7%	9%
Social media services (e.g. Facebook, Twitter, Instagram, etc.)*	28%	29%	26%	28%	4%	7%
Unlawful sources	**0%**	**4%**	**0%**	**4%**	**0%**	**11%**
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	Not asked	Not asked	0%	7%
NEW Receiving a link to stream music made available by someone else (e.g. via forums)	Not asked	Not asked	Not asked	Not asked	0%	3%
A file hosting website or cyberlocker (e.g. MediaFire, Mega, ZippyShare, etc.)	0%	4%	0%	4%	0%	1%
Other sources	**3%**	**8%**	**3%**	**6%**	**4%**	**6%**
Stream for free from the internet, without really being sure where it comes from	3%	7%	2%	6%	3%	6%
Other	1%	1%	1%	<1%	1%	1%

Q16. How is your music streaming time typically split across the following? (Enter percentage of time for each option)
* Note: In 2022, the YouTube example was reallocated to streaming services to better reflect its function it the marketplace. Prior to 2022, YouTube was included as an example under the social media category.

Table 30: Average proportion of time spent downloading music, by infringer status

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

Source	2020		2021		2022	
	Non-infringer (n=135)	**Infringer** (n=307)	**Non-infringer** (n=96)	**Infringer** (n=213)	**Non-infringer** (n=119)	**Infringer** (n=278)
Lawful sources	**87%**	**34%**	**91%**	**36%**	**78%**	**36%**
Saving offline via a paid for subscription service (e.g. Spotify Premium)	56%	25%	59%	26%	64%	29%
Pay-per-view / paying a single fee to download individual songs or albums through services	31%	9%	32%	10%	15%	7%
Unlawful sources	**0%**	**55%**	**0%**	**51%**	**0%**	**58%**
Using an online converter (e.g. Y2mate, YTMP3) or 'stream ripping' software	0%	25%	0%	21%	0%	21%
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	Not asked	Not asked	0%	14%
Receiving the file(s) directly from someone else (e.g. Dropbox, Google Drive, USB stick, etc.)	0%	8%	0%	8%	0%	6%
Receiving a link to download music made available by someone else (e.g. via forums)	0%	9%	0%	7%	0%	6%
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent)	0%	8%	0%	9%	0%	5%
A file hosting website or cyberlocker (e.g. MediaFire, Mega, ZippyShare, etc.)	0%	6%	0%	6%	0%	5%
Other sources	**13%**	**10%**	**9%**	**13%**	**22%**	**6%**
Download for free from the internet, without really being sure where it comes from	8%	9%	9%	13%	19%	5%
Other	5%	1%	0%	<1%	3%	<1%

Q15. How is the way that you download music typically split across the following? (Enter percentage of time for each option). 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.[41]

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

Table 31: Average proportion of time spent streaming movies or films, by infringer status

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

Source	2020		2021		2022	
	Non-infringer (n=871)	**Infringer** (n=430)	**Non-infringer** (n798)	**Infringer** (n=379)	**Non-infringer** (n=773)	**Infringer** (n=481)
Lawful sources	**99%**	**82%**	**98%**	**80%**	**98%**	**76%**
A paid subscription to an online video streaming service (e.g. Netflix, Stan, etc.)*	68%	41%	72%	43%	78%	50%
Watching movies / films online (via websites or apps) via TV Catch-up services	11%	11%	11%	10%	8%	7%
Subscription to a Pay TV service that allows you to watch online (e.g. Fetch TV)	9%	10%	7%	9%	6%	7%
NEW A free version of a streaming / download service that has a paid premium tier*	Not asked	Not asked	Not asked	Not asked	5%	9%
Social media services (e.g. Facebook, Twitter, Instagram, etc.)*	9%	15%	6%	13%	1%	2%
'Pay-per-view' / paying a single fee to rent individual movies through services	2%	4%	1%	5%	1%	2%
Unlawful sources	**0%**	**12%**	**0%**	**15%**	**0%**	**22%**
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	Not asked	Not asked	0%	6%
Through other apps / services that you do not have a paid subscription to, but can be accessed through app marketplaces	Not asked	Not asked	0%	5%	0%	6%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box (e.g. 'fully-loaded' Kodi)	0%	4%	0%	4%	0%	4%
NEW Through websites that you do not have to pay to access, which allow you to stream full-length movie content for free	Not asked	Not asked	Not asked	Not asked	0%	3%
Receiving a link to stream movies / films made available by someone else	0%	5%	0%	3%	0%	1%
A file hosting website or cyberlocker (e.g. MediaFire, Mega, ZippyShare, etc.)	0%	3%	0%	3%	0%	1%
Other sources	**1%**	**6%**	**2%**	**6%**	**2%**	**2%**
Stream for free from the internet, without really being sure where it comes from	1%	5%	2%	6%	1%	2%
Other	<1%	1%	<1%	0%	1%	<1%

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

* Note: In 2022, the YouTube example was reallocated to streaming services to better reflect its function it the marketplace. Prior to 2022, YouTube was included as an example under the social media category.

Table 32: Average proportion of time spent downloading movies or films, by infringer status

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

Source	2020		2021		2022	
	Non-infringer (n=85)	**Infringer** (n=278)	**Non-infringer** (n=61)	**Infringer** (n=210)	**Non-infringer** (n=91)	**Infringer** (n=222)
Lawful sources	**97%**	**39%**	**82%**	**40%**	**86%**	**39%**
'Saving offline' via a paid for subscription service (e.g. Netflix, Amazon Prime Video etc.)	76%	30%	74%	31%	75%	28%
'Pay-per-view' / paying a single fee to download individual movies through services	21%	9%	8%	9%	11%	11%
Unlawful sources	**0%**	**53%**	**0%**	**50%**	**0%**	**56%**
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent)	0%	21%	0%	20%	0%	20%
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	Not asked	Not asked	0%	17%
Using an online converter (e.g. Y2mate, YTMP3) or 'stream ripping' software	0%	12%	0%	10%	0%	8%
A file hosting website or cyberlocker (e.g. MediaFire, Mega, ZippyShare, etc.)	0%	6%	0%	5%	0%	4%
Receiving a link to download movies / films made available by someone else	0%	7%	0%	7%	0%	4%
Receiving the file(s) directly from someone else (e.g. Dropbox, Google Drive, USB stick, etc.)	0%	7%	0%	8%	0%	3%
Other sources	**3%**	**8%**	**18%**	**10%**	**14%**	**5%**
Download for free from the internet, without really being sure where it comes from	3%	8%	13%	10%	11%	5%
Other	0%	<1%	5%	1%	3%	<1%

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

Table 33: Average proportion of time spent streaming TV programs, by infringer status

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

Source	2020		2021		2022	
	Non-infringer (n=941)	**Infringer** (n=487)	**Non-infringer** (n=909)	**Infringer** (n=401)	**Non-infringer** (n=834)	**Infringer** (n=525)
Lawful sources	**99%**	**83%**	**98%**	**78%**	**98%**	**74%**
A paid subscription to an online video streaming service (e.g. Netflix)*	54%	37%	56%	39%	61%	40%
Watching TV online either live or via TV Catch-up services (e.g. 10 play, ABC iView)	26%	18%	25%	15%	23%	14%
Subscription to a Pay TV service that allows you to watch online (e.g. Fetch TV)	10%	9%	9%	10%	8%	6%
NEW A free version of a streaming / download service that has a paid premium tier*	Not asked	Not asked	Not asked	Not asked	5%	9%
Social media services*	8%	15%	8%	11%	1%	2%
'Pay-per-view' / paying a single fee to rent individual TV programs / episodes	1%	4%	1%	3%	<1%	1%
Unlawful sources	**0%**	**12%**	**0%**	**16%**	**0%**	**21%**
Apps / services accessible via app marketplaces without a paid subscription	Not asked	Not asked	0%	6%	0%	6%
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	Not asked	Not asked	0%	6%
NEW Through websites, which allow you to stream full-length TV programs or series for free	Not asked	Not asked	Not asked	Not asked	0%	4%
Through apps / services that you do not have a paid subscription to, accessible via set-top box	0%	5%	0%	4%	0%	3%
Receiving a link to stream TV programs made available by someone else	0%	4%	0%	4%	0%	1%
A file hosting website or cyberlocker	0%	3%	0%	2%	0%	1%
Other sources	**1%**	**5%**	**2%**	**6%**	**2%**	**5%**
Stream for free from the internet, without really being sure where it comes from	1%	4%	2%	5%	1%	3%
Other	<1%	1%	<1%	1%	1%	2%

Q32. How is the way you stream TV programs typically split across the following? (Enter percentage of time for each option). * Note: In 2022, the YouTube example was reallocated to streaming services to better reflect its function in the marketplace. Prior to 2022, YouTube was included as an example under the social media category.

Table 34: Average proportion of time spent downloading TV programs, by infringer status

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

Source	2020		2021		2022	
	Non-infringer (n=52)	**Infringer** (n=210)	**Non-infringer** (n=52)	**Infringer** (n=143)	**Non-infringer** (n=57)	**Infringer** (n=150)
Lawful sources	**89%**	**40%**	**87%**	**38%**	**81%**	**38%**
'Saving offline' via a paid for subscription service (e.g. Netflix, Amazon Prime Video)	77%	30%	72%	29%	75%	28%
'Pay-per-view' / paying a single fee to download individual TV programs or series	11%	10%	15%	8%	7%	10%
Unlawful sources	**0%**	**51%**	**0%**	**52%**	**0%**	**57%**
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent)	0%	21%	0%	25%	0%	21%
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	Not asked	Not asked	0%	17%
Using an online converter (e.g. Y2mate, YTMP3) or 'stream ripping' software	0%	13%	0%	10%	0%	6%
Receiving a link to download TV programs made available by someone else	0%	6%	0%	8%	0%	5%
A file hosting website or cyberlocker	0%	5%	0%	3%	0%	4%
Receiving the file(s) directly from someone else (e.g. Dropbox, Google Drive, USB stick)	0%	5%	0%	6%	0%	3%
Other sources	**11%**	**9%**	**13%**	**10%**	**19%**	**5%**
Download for free from the internet, without really being sure where it comes from	8%	8%	10%	8%	7%	4%
Other	3%	2%	3%	3%	11%	1%

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

Table 35: Average proportion of time spent downloading / accessing video games, by infringer status

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

Source	2020		2021		2022	
	Non-infringer (n=342)	Infringer (n=394)	Non-infringer (n=312)	Infringer (n=310)	Non-infringer (n=423)	Infringer (n=483)
Lawful sources	**94%**	**67%**	**97%**	**69%**	**92%**	**67%**
Downloading video games for free (e.g. through the Apple App Store, Google Play etc.).	39%	25%	40%	25%	42%	24%
A video game subscription or streaming service (e.g. PlayStation Now or Google Stadia)	5%	6%	11%	8%	23%	19%
NEW Accessing video games using your internet browser (playing directly via websites)	Not asked	Not asked	Not asked	Not asked	13%	9%
Paying a single fee to download individual video games (e.g. through Google Play etc..)	39%	25%	34%	26%	10%	11%
Social media services	10%	11%	12%	9%	5%	4%
Unlawful sources	**0%**	**30%**	**0%**	**28%**	**0%**	**26%**
Paying a small fee to access subscription services through a shared / unknown account	0%	2%	0%	2%	0%	10%
Downloading mod versions of mobile games for free	0%	8%	0%	7%	0%	6%
Receiving a link to download video games made available by someone else	0%	3%	0%	4%	0%	2%
Receiving the file(s) directly from someone else (e.g. Dropbox, Google Drive, USB stick)	0%	3%	0%	3%	0%	2%
Downloading emulator versions of typically older games for free	0%	4%	0%	4%	0%	2%
A file hosting web site or cyberlocker (e.g. MediaFire, Mega, ZippyShare, etc.)	0%	3%	0%	3%	0%	1%
Downloading a crack for a game to bypass Digital Rights Management (DRM)	0%	2%	0%	1%	0%	1%
BitTorrent or another file-sharing or peer to peer service (e.g. uTorrent)	0%	4%	0%	4%	0%	1%
Other sources	**6%**	**3%**	**3%**	**4%**	**8%**	**7%**
Download for free from the internet, without really being sure where it comes from	2%	3%	2%	3%	4%	4%
Other	4%	1%	<1%	<1%	4%	3%

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

Table 36: Average proportion of time spent streaming / accessing live sport, by infringer status

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

Source	2020		2021		2022	
	Non-infringer (n=316)	Infringer (n=331)	Non-infringer (n=335)	Infringer (n=261)	Non-infringer (n=380)	Infringer (n=395)
Lawful sources	**90%**	**65%**	**90%**	**64%**	**93%**	**63%**
A paid subscription to a sports platform / app that can be accessed online	31%	18%	42%	25%	44%	26%
NEW Watching live sport on free-to-air TV online (via websites or apps)	Not asked	Not asked	Not asked	Not asked	29%	20%
Subscription to a Pay TV service that allows you to watch online (e.g. Fetch TV etc.)	29%	21%	23%	17%	14%	11%
Free scheduled broadcasts by an official source on social media sites or other official site / app	30%	25%	26%	22%	5%	5%
NEW 'Pay-per-view' / paying a single fee to access individual games / matches through a service	Not asked	Not asked	Not asked	Not asked	<1%	1%
Unlawful sources	**0%**	**28%**	**0%**	**25%**	**0%**	**33%**
NEW Paying a small fee to access subscription services through a shared / unknown account	Not asked	Not asked	Not asked	Not asked	0%	10%
NEW Through websites which allow you to stream full-length live sport content for free	Not asked	Not asked	Not asked	Not asked	0%	6%
NEW Other apps / services accessed through app marketplaces without paid subscriptions	Not asked	Not asked	Not asked	Not asked	0%	5%
Apps / services accessed through a set-top box without a paid subscription	0%	9%	0%	8%	0%	5%
A broadcast by an individual (i.e. not an official source) on social media sites or other sites	0%	12%	0%	11%	0%	5%
Receiving a link to stream live sport made available by someone else	0%	8%	0%	6%	0%	2%
Other sources	**10%**	**7%**	**10%**	**11%**	**7%**	**5%**
Stream for free from the internet, without really being sure where it comes from	5%	6%	5%	9%	3%	3%
Other	4%	1%	5%	2%	4%	2%

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

Changes in use of content area sources

In order to explore any conscious changes in behaviour over time, respondents were asked whether they were using the various sources they reported using in 2022 more, less, or about the same as this time one year ago.

In this format of question, respondents often tend to respond that they feel they have done things more often, and that pattern is observed in this survey. Note that in this survey though, this question only applies to sources that people reported using in 2022, and so it cannot pick up respondents who may have stopped using a particular source entirely. As such, the reported changes naturally under-estimate the proportion who have reduced their usage of each source, and these results should be interpreted as indicative of perceived changes in self-behaviour.

Across each of the content areas there is considerable variation at the level of individual sources, but there are a number of common observations that can be made.

- Many people perceive that they are making changes to their consumption habits from year to year.
- In general, people are more likely to report what feels like an increase in consumption than they are to report a decline in consumption each year (but noting the point above that reduced use of sources will naturally be under-reported, due to those who stop using a source entirely not be asked about changes).
- If anything, there is more volatility in the perceived use of sources that are classified as likely to be unlawful.
- The general patterns of change survey respondents report in each of the last three years has been broadly similar for the individual sources.
- Several nuances are apparent in the 2022 survey responses:
    - There appears to have been a greater than usual sense of respondents who use pay-per-view / one-off purchases using them less, with this seen across several content areas.
    - Compared to other sources, relatively fewer of those who use BitTorrent reported using this source more often in the last 12 months.

Table 37: Change in usage of sources to download / stream music

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

Method used to download/stream/access music online	2020 % Using (n=1,245)	2020 % More	2020 % Less	2021 % Using (n=1,098)	2021 % More	2021 % Less	2022* % Using (n=1,214)	2022* % More	2022* % Less
LAWFUL									
'Saving offline' via a paid for subscription service	22%	44%	14%	17%	44%	15%	17%	43%	14%
Streaming via a paid for subscription service	41%	45%	10%	45%	35%	9%	46%	35%	12%
A free version / tier of a music streaming service	41%	42%	10%	42%	39%	10%	44%	31%	14%
Listening to the radio online (via websites or apps) either live or through catchup services	26%	45%	14%	26%	37%	10%	21%	28%	14%
'Pay-per-view' / paying a single fee to download individual songs or albums through services	15%	45%	19%	12%	32%	19%	8%	28%	23%
Social media services	48%	38%	12%	49%	33%	12%	20%	38%	16%
UNLAWFUL									
Paying a small fee to access one or many games through a shared / unknown account (e.g. shared login credentials)	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	11%	42%	25%
A file hosting website or cyberlocker	14%	50%	20%	11%	45%	22%	5%	47%	19%
BitTorrent or another file-sharing or peer to peer service	9%	41%	18%	7%	40%	21%	3%	38%	20%
Downloading music from sites such as YouTube using an online converter or 'stream ripping' software, app or browser extension	15%	46%	14%	12%	43%	10%	10%	30%	32%
Receiving the file(s) directly from someone else	12%	45%	18%	9%	46%	17%	6%	46%	19%
Receiving a link to download music made available by someone else	12%	48%	15%	9%	39%	16%	10%	35%	24%
OTHER									
Download or stream for free from the internet, without really being sure where it comes from	32%	35%	22%	21%	40%	20%	15%	29%	24%

Q18. Overall, compared to this time last year, how often are you using these method(s) to access music?

Notes: '% More' refers to the sum of 'much more', 'a bit more', and 'I wasn't using this method last year', whilst '% less' refers to the sum of 'much less' and 'a bit less'.
'% Using' refers to the proportion of **all respondents who downloaded/streamed/shared music in the past 3 months** who indicated using each method to access music.

* In 2022, changes to the questionnaire were made that affected how respondents were asked about the methods they use to access media content online. Some of these changes may have affected how some individuals respond to this question, and so readers are advised to use caution when comparing results between 2022 and prior years.

Table 38: Change in usage of sources to download / stream movies / films (continues overleaf)

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

Method used to download/stream/access movies online	2020			2021			2022*		
	% Using (n=1,458)	% More	% Less	% Using (n=1,292)	% More	% Less	% Using (n=1,412)	% More	% Less
LAWFUL									
'Saving offline' via a paid for subscription service	17%	45%	12%	15%	38%	13%	12%	37%	13%
Streaming via a paid subscription to an online video streaming service	73%	48%	6%	77%	36%	8%	75%	39%	9%
A subscription to a Pay TV service that allows you to watch online	21%	49%	10%	21%	42%	7%	17%	31%	11%
A free version / tier of a video streaming service	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	20%	33%	15%
Watching movies / films online through catchup TV services	33%	46%	8%	36%	38%	11%	25%	34%	14%
'Pay-per-view' / paying a single fee to download individual movies / films through services	10%	49%	13%	9%	49%	13%	6%	30%	18%
'Pay-per-view' / paying a single fee to rent individual movies / films through a service	12%	48%	14%	12%	33%	18%	7%	39%	16%
Social media services	30%	39%	12%	27%	35%	12%	7%	23%	13%
UNLAWFUL									
A file hosting website or cyberlocker	10%	43%	20%	8%	48%	14%	3%	51%	17%
Through websites that you do not have to pay to access, which allow you to stream full-length movies or films for free	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	7%	39%	21%
BitTorrent or another file-sharing or peer to peer service	10%	30%	18%	9%	35%	18%	5%	26%	29%
Downloading video content from sites such as YouTube using an online converter or 'stream ripping' software, app or browser extension	10%	49%	12%	8%	48%	15%	3%	41%	12%
Receiving the file(s) directly from someone else	8%	47%	18%	7%	49%	19%	2%	45%	18%
Receiving a link to download or stream movies / films made available by someone else	13%	47%	14%	11%	42%	17%	4%	33%	20%
Paying a small fee to access one or many games through a shared / unknown account (e.g. shared login credentials)	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	10%	33%	26%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box	6%	51%	18%	6%	46%	9%	5%	52%	7%

Through other apps / services that you do not have a paid subscription to that can be accessed through app marketplaces	Not asked	Not asked	Not asked	8%	39%	13%	9%	33%	16%
OTHER									
Download / stream for free from the internet, without really being sure where it comes from	18%	33%	22%	17%	39%	14%	8%	38%	16%

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

Notes: '% More' refers to the sum of 'much more', 'a bit more', and 'I wasn't using this method last year', whilst '% less' refers to the sum of 'much less' and 'a bit less'.
'% Using' refers to the proportion of **all respondents who downloaded/streamed/shared movies or films in the past 3 months** who indicated using each method to access movies / films.

* In 2022, changes to the questionnaire were made that affected how respondents were asked about the methods they use to access media content online. Some of these changes may have affected how some individuals respond to this question, and so readers are advised to use caution when comparing results between 2022 and prior years.

Table 39: Change in usage of sources to download / stream TV programs (continues overleaf)

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

	2020			2021			2022*		
Method used to download/stream/access TV online	**% Using** (n=1,517)	**% More**	**% Less**	**% Using** (n=1,384)	**% More**	**% Less**	**% Using** (n=1,466)	**% More**	**% Less**
LAWFUL									
Saving offline' on a paid for subscription service	11%	51%	12%	10%	35%	11%	7%	34%	13%
Streaming via a paid for subscription service	66%	45%	8%	68%	34%	6%	62%	37%	7%
A subscription to a Pay TV service that allows you to watch online	22%	46%	10%	22%	32%	10%	16%	40%	8%
A free version / tier of a video streaming service	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	18%	33%	8%
Watching TV online either live or through catchup services	48%	45%	10%	49%	37%	9%	37%	39%	9%
'Pay-per-view' / paying a single fee to download individual programs, episodes or series through services	6%	52%	17%	5%	41%	17%	3%	43%	14%
'Pay-per-view' / paying a single fee to rent individual programs, episodes or series through a service	10%	44%	14%	9%	35%	22%	4%	40%	21%
Social media services	29%	42%	12%	26%	36%	9%	6%	39%	15%
UNLAWFUL									
Paying a small fee to access one or many games through a shared / unknown account (e.g. shared login credentials)	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	7%	58%	15%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box	7%	51%	14%	5%	40%	16%	3%	43%	12%
Through other apps / services that you do not have a paid subscription to that can be accessed through app marketplaces	Not asked	Not asked	Not asked	8%	39%	19%	8%	48%	9%
A file hosting website or cyberlocker	8%	45%	14%	6%	37%	14%	2%	40%	15%
Through websites that you do not have to pay to access, which allow you to stream full-length TV programs or series for free	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	6%	41%	14%
BitTorrent or another file-sharing or peer to peer service	6%	35%	23%	6%	29%	22%	3%	26%	15%
Downloading TV programs / episodes from sites such as YouTube using an online converter or 'stream ripping' software, app or browser extension	5%	60%	10%	4%	44%	17%	2%	58%	12%

Method used to download/stream/access TV online	2020 % Using (n=1,517)	2020 % More	2020 % Less	2021 % Using (n=1,384)	2021 % More	2021 % Less	2022* % Using (n=1,466)	2022* % More	2022* % Less
Receiving the file(s) directly from someone else	5%	45%	21%	4%	46%	21%	1%	36%	22%
Receiving a link to download / stream TV programs made available by someone else	11%	42%	19%	9%	43%	14%	3%	49%	9%
OTHER									
q33.23. Download or stream for free from the internet, without really being sure where it comes from	13%	43%	22%	13%	32%	13%	6%	35%	19%

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

Notes: '% More' refers to the sum of 'much more', 'a bit more', and 'I wasn't using this method last year', whilst '% less' refers to the sum of 'much less' and 'a bit less'.

'% Using' refers to the proportion of **all respondents who downloaded/streamed/shared TV content in the past 3 months** who indicated using each method to access TV programs.

* In 2022, changes to the questionnaire were made that affected how respondents were asked about the methods they use to access media content online. Some of these changes may have affected how some individuals respond to this question, and so readers are advised to use caution when comparing results between 2022 and prior years

Table 40: Change in usage of sources to download / access video games

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

Method used to download/stream/access video games online	2020			2021			2022*		
	% Using (n=737)	% More	% Less	% Using (n=618)	% More	% Less	% Using (n=910)	% More	% Less
LAWFUL									
A video game subscription or streaming service	22%	46%	11%	27%	36%	13%	32%	38%	16%
Accessing video games using your internet browser (playing directly via websites)	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	22%	36%	17%
Downloading video games for free	57%	33%	12%	57%	28%	14%	49%	29%	17%
Paying a single fee to download individual video game through services	54%	32%	17%	54%	25%	17%	22%	31%	16%
Social media services	28%	42%	12%	27%	34%	10%	10%	41%	9%
UNLAWFUL									
Paying a small fee to access one or many games through a shared / unknown account (e.g. shared login credentials)	10%	63%	16%	10%	27%	25%	11%	33%	10%
A file hosting web site or cyberlocker	13%	50%	18%	11%	48%	14%	3%	34%	35%
BitTorrent or another file-sharing or peer to peer service	13%	49%	16%	12%	43%	20%	4%	28%	10%
Receiving the file(s) directly from someone else	14%	53%	15%	13%	42%	16%	5%	60%	14%
Receiving a link to download video games made available by someone else	14%	55%	14%	12%	39%	12%	5%	26%	44%
Downloading modded versions of mobile games for free	18%	44%	16%	17%	34%	14%	9%	27%	15%
Downloading a crack for a game to bypass Digital Rights Management (DRM) or other security protocols for lawfully downloaded games	9%	52%	21%	6%	41%	20%	3%	31%	21%
Downloading emulator versions of typically older games for free	12%	42%	21%	10%	29%	23%	4%	39%	25%
OTHER									
Download or stream for free from the internet, without really being sure where it comes from	12%	49%	16%	12%	42%	19%	7%	30%	28%

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

Notes: '% More' refers to the sum of 'much more', 'a bit more', and 'I wasn't using this method last year', whilst '% less' refers to the sum of 'much less' and 'a bit less'.
'% Using' refers to the proportion of **all respondents who downloaded/streamed/shared video games in the past 3 months** who indicated using each method to access video games.

* In 2022, changes to the questionnaire were made that affected how respondents were asked about the methods they use to access media content online. Some of these changes may have affected how some individuals respond to this question, and so readers are advised to use caution when comparing results between 2022 and prior years.

Table 41: Change in usage of sources to stream / access live sport

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

Method used to download/stream/access live sport online	2020 % Using (n=641)	2020 % More	2020 % Less	2021 % Using (n=593)	2021 % More	2021 % Less	2022* % Using (n=778)	2022* % More	2022* % Less
LAWFUL									
A paid subscription to a sports platform that can be accessed online	43%	40%	15%	49%	38%	7%	42%	43%	9%
A subscription to a Pay TV service that allows you to watch online	44%	37%	15%	34%	31%	7%	18%	31%	14%
Watching live sport on free-to-air TV online (via websites or apps)	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	38%	22%	15%
'Pay-per-view' / paying a single fee to access individual games / matches through a service	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	4%	51%	19%
Free scheduled broadcasts by an official source on social media sites or other official website / app	47%	38%	18%	41%	33%	13%	12%	26%	20%
UNLAWFUL									
Paying a small fee to access one or many games through a shared / unknown account (e.g. shared login credentials)	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	9%	36%	33%
Through apps / services that you do not have a paid subscription to, but can be accessed through a set-top box	17%	56%	11%	13%	48%	18%	6%	37%	12%
Through other apps / services that you do not have a paid subscription to that can be accessed through app marketplaces	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	7%	35%	15%
Through websites that you do not have to pay to access, which allow you to stream full-length live sport content for free	Not asked	Not asked	Not asked	Not asked	Not asked	Not asked	7%	35%	11%
Receiving a link to download / stream live sport content made available by someone else	19%	53%	15%	14%	50%	14%	2%	51%	5%
A broadcast by an individual (i.e. not an official source) on social media sites like Facebook, Twitter, Twitch, Periscope, TikTok or Snapchat, or via sites such as YouTube or Daily Motion	22%	49%	18%	17%	36%	17%	6%	34%	17%
OTHER									
Stream for free from the internet, without really being sure where it comes from	20%	50%	16%	18%	43%	9%	6%	29%	12%

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

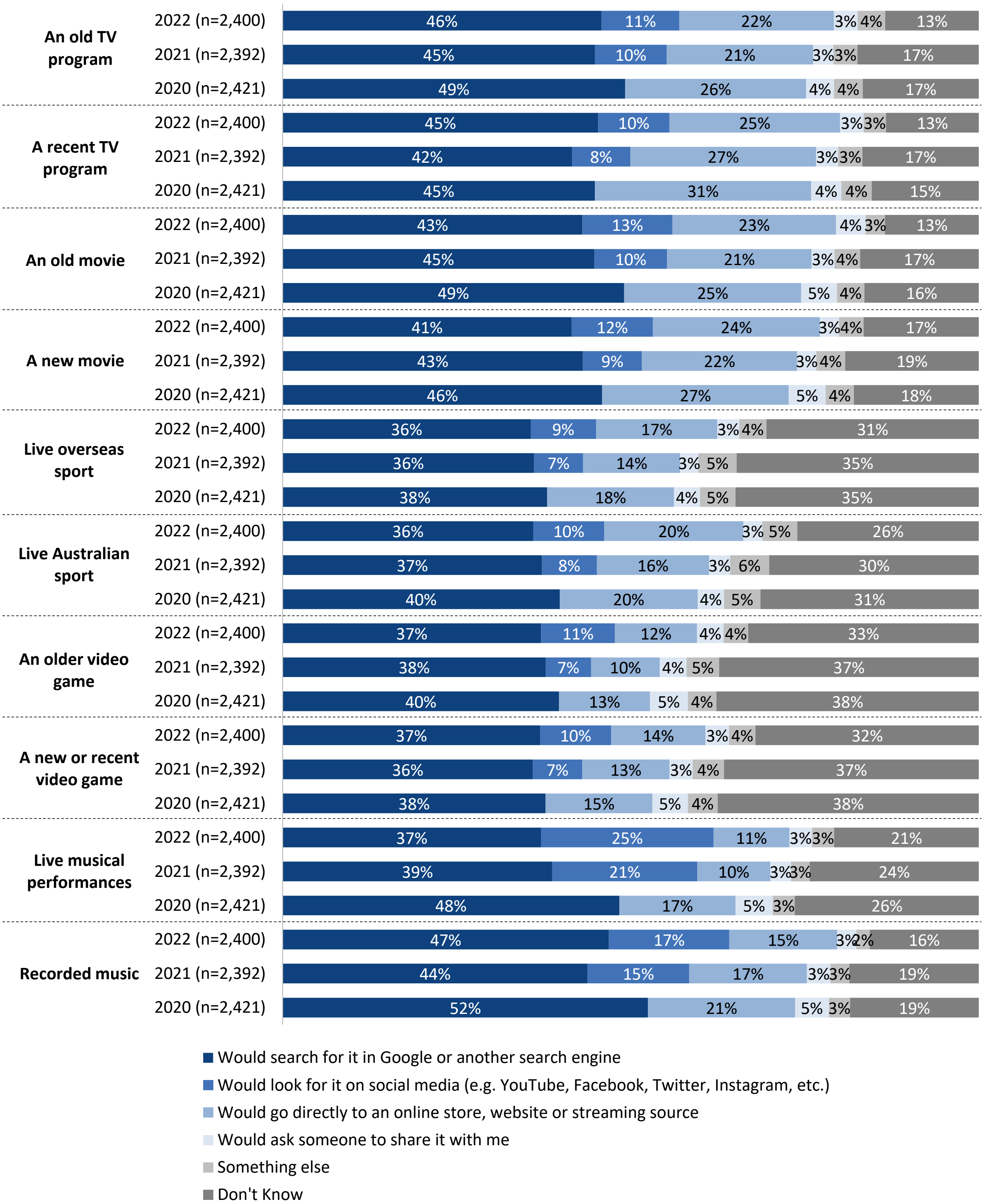
Notes: '% More' refers to the sum of 'much more', 'a bit more', and 'I wasn't using this method last year', whilst '% less' refers to the sum of 'much less' and 'a bit less'.
'% Using' refers to the proportion of **all respondents who downloaded/streamed/shared live sport** in the past 3 months who indicated using each method to access live sport.

* In 2022, changes to the questionnaire were made that affected how respondents were asked about the methods they use to access media content online. Some of these changes may have affected how some individuals respond to this question, and so readers are advised to use caution when comparing results between 2022 and prior years.

Motivators and Attitudes – detailed tracking charts

Figure 59: Ways to go about finding new content not previously accessed, 2020-2022

Base: All respondents

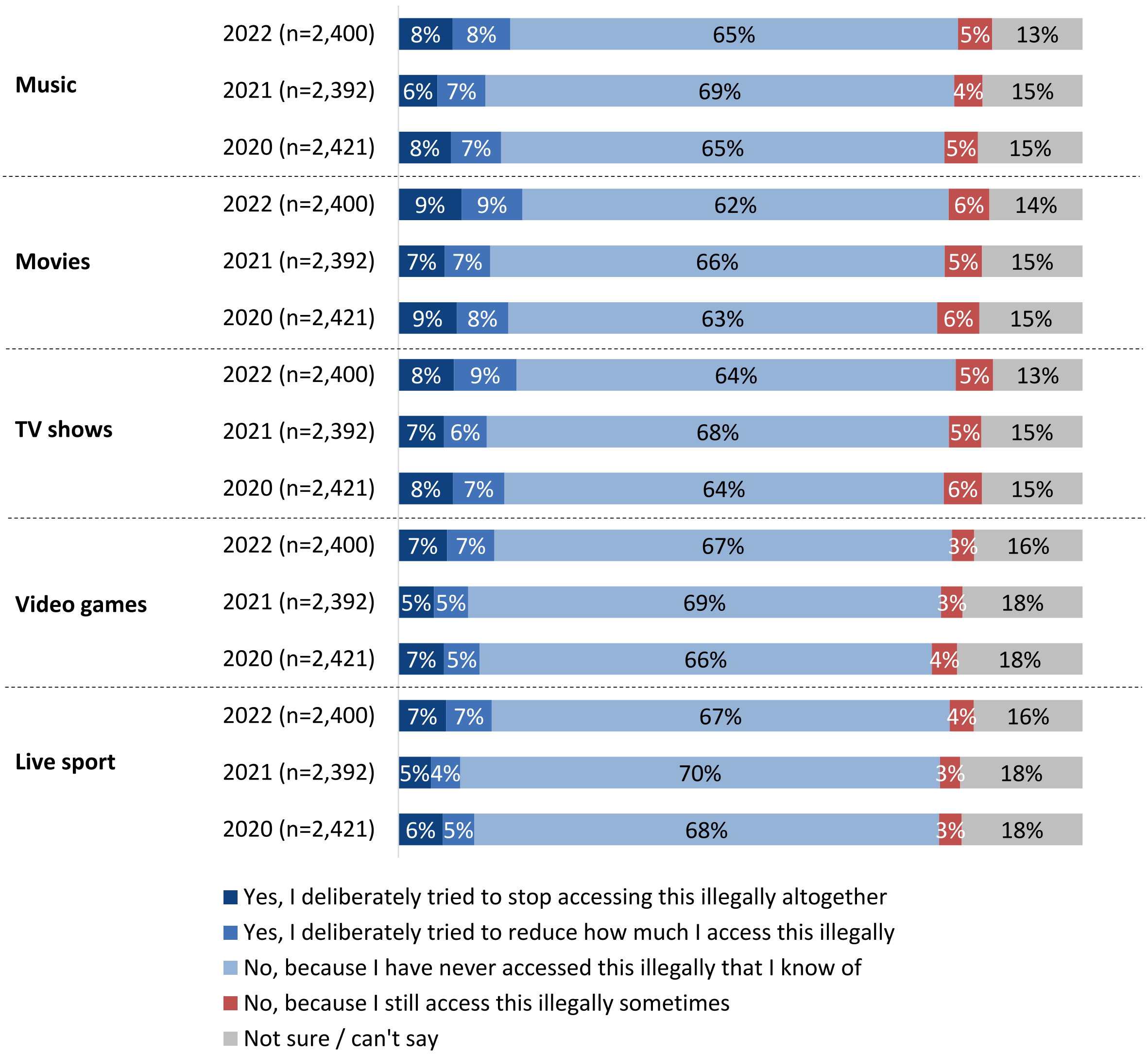


Q59. Imagine you were looking to find some specific new content that you had heard about. For each of these content types, how would you first go about trying to find it?

Note: 'Would go look for it on social media' was not presented as an option to respondents in 2020. This option was added in 2021.

Figure 60: Behaviour change in relation to accessing content that might be unlawful, 2020-2022

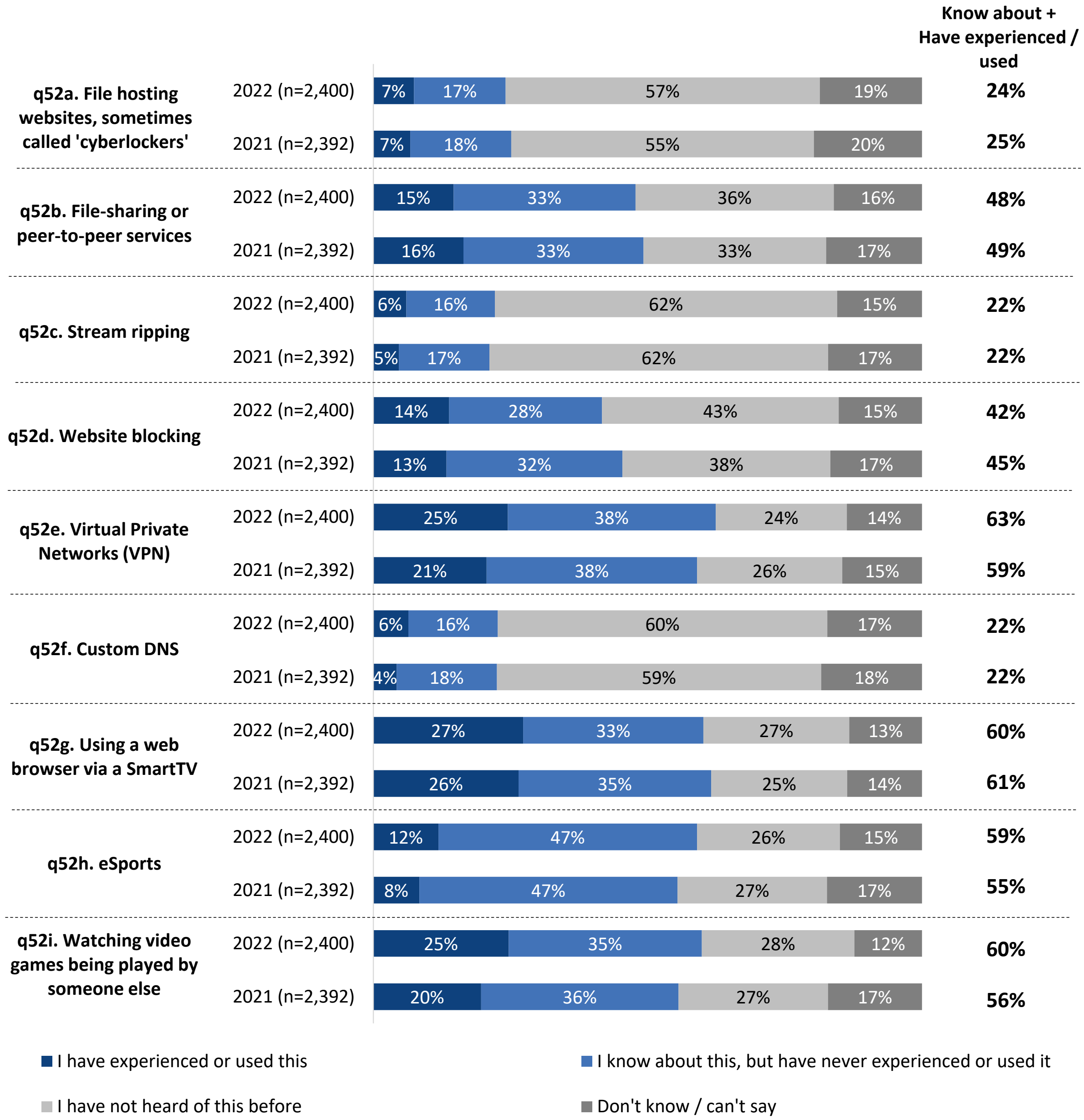
Base: All respondents



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?

Figure 61: Familiarity with online terms, 2021-2022

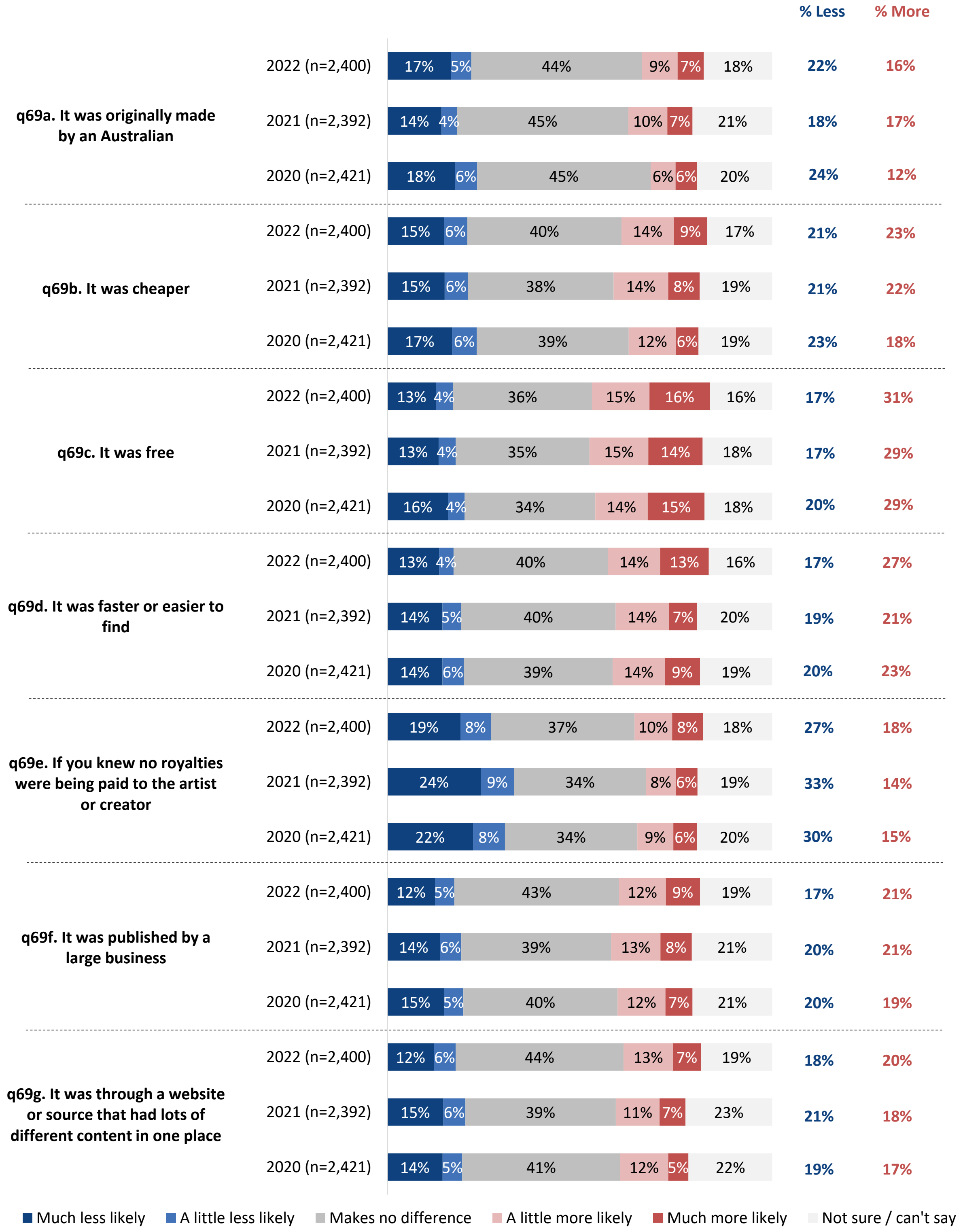
Base: All respondents

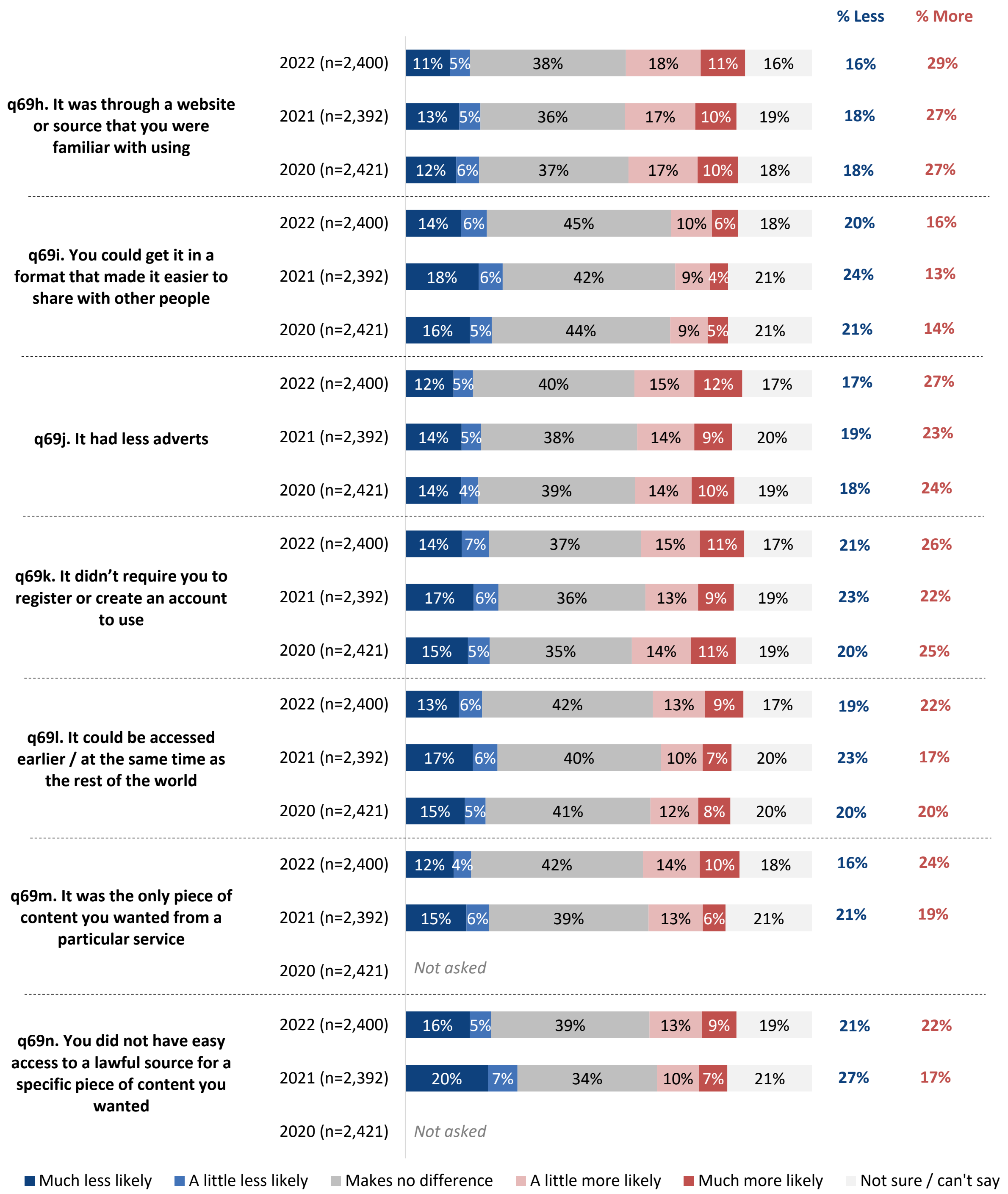


Q52. How familiar are you with the following?

Figure 62: Likelihood of accessing content unlawfully under different circumstances, 2020-2022

Base: All respondents





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