

Hadopi, cultural assets and internet use: practices and perceptions of French internet users.

Summary and key figures.

Sunday 23 January 2011

Hadopi

Haute Autorité pour la diffusion des œuvres
et la protection des droits sur internet

I. Key figures

Illegal use

- 49% of internet users admit to illegal use. However, almost all users (95%) think that French internet users do this. There is a significant gap between actual illegal use and the assumptions of users.

Security

- The vast majority of internet users (7 out of 10) are aware of the need to protect their internet access.

Legal offering

- 59% of those who claim to use the internet legally think that paying for access makes it legal. This percentage falls to 46% among those that admit to illegal use. Almost a third of web users do not know whether paying for access makes it legal (all usage types included).
- 42% of internet users think that a seal of approval denotes lawfulness.

II. A study on strictness and reliability

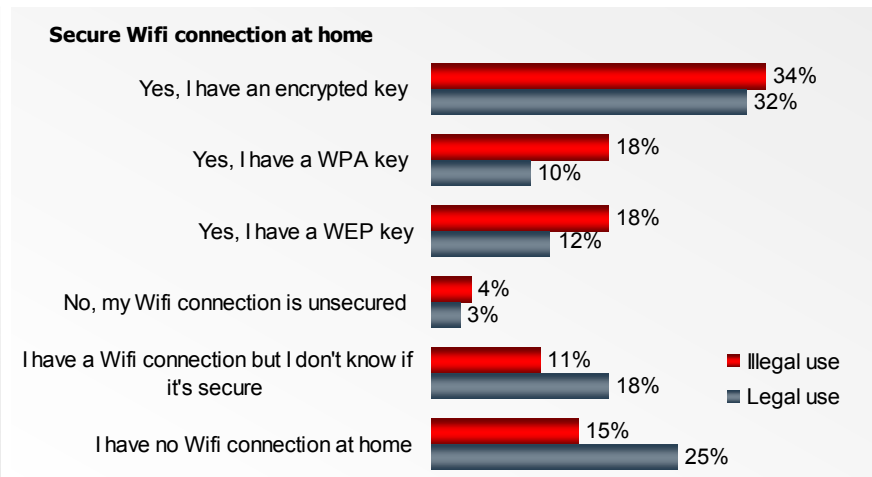
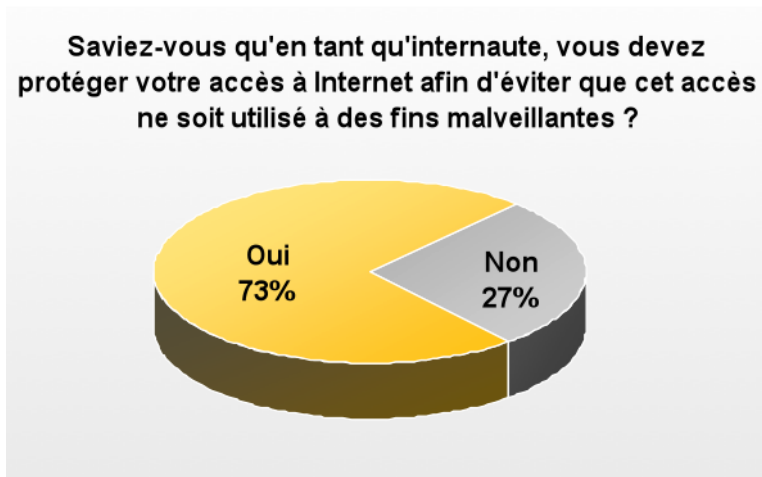
- Online study conducted between 25 October and 4 November 2010.
- Objective: to get an initial image of the practices and perceptions of French web users in terms of the declared accessing of cultural assets on the internet.
- 4 expert service providers to lead the study.
- 2687 web users were surveyed, divided into two samples, one of which was a control sample.
- The first sample (1624 web users) was almost twice as large as the usual sample used for representational purposes at the national level, so that the sample fractions could be properly analysed.
- Samples were of a very high quality (no major differences between them, quotas closely adhered to).

III. Illegal use: 49% declared, 95% projected

- 49% of web users admit to illegal use, but 95% of internet users think that French web users do this ("generalisation").
- 38% say that they have been accessing content illegally for over 3 years. 29% have been doing so for less than 6 months. This practice is not slowing down and is diversifying.
- Most people use the internet illegally at ages 15-39, and men are more heavily represented in households with 4 people. However, there is no difference between the Paris Metropolitan Region and the provinces.

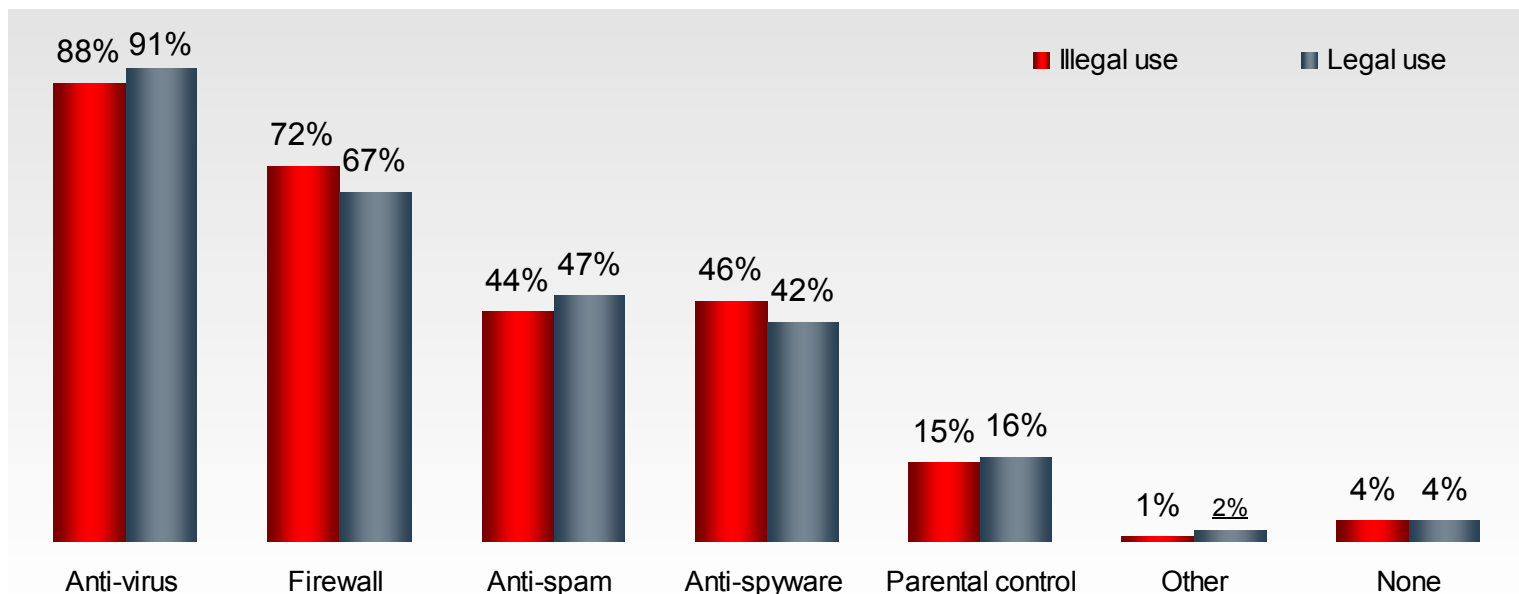
IV. 73% of users know that they must make their internet access secure and have the means to do so

- 54% of web users say that they access content legally and 70% of those admitting to illegal use say that they have a secure WiFi network (different methods declared).



V. 73% of users know that they must make their internet access secure and have the means to do so

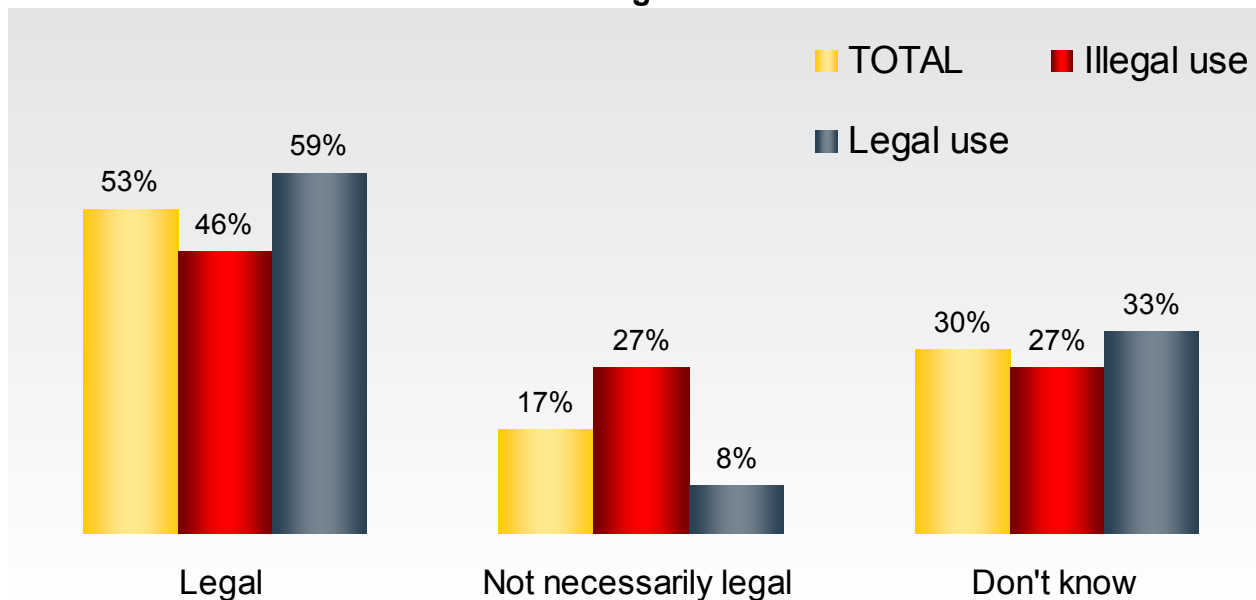
- 72% of web users who admit to illegal use have a firewall.



VI. Web users find it hard to distinguish between legal and illegal use

- 59% of internet users who claim to access content legally think that paying for access makes it legal. This figure falls to 46% among those who admit to illegal use. Almost a third of web users do not know (all usage types included).

When you access cultural content online, if you have paid for this content, do you think that accessing the content is



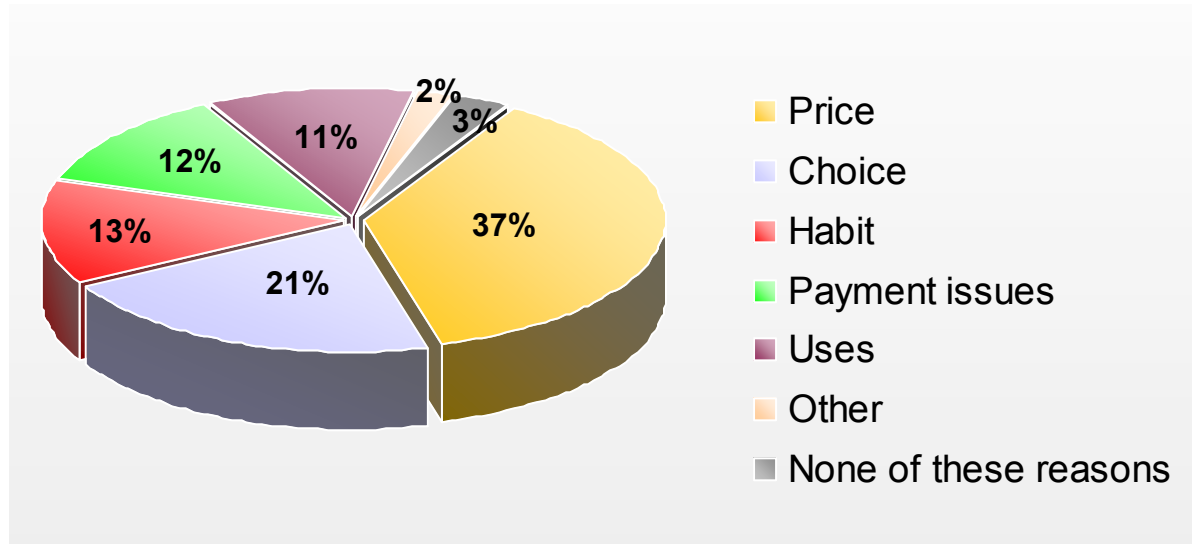
VII. Web users find it hard to distinguish between legal and illegal use

- 42% of web users think that a seal of approval guarantees legality.

Parmi les éléments listés ci-dessous, lesquels vous permettent d'identifier le caractère légal des sites proposant des produits ou services culturels ?	TOTAL	Usages illicites	Usages licites
<i>TOTAL</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
Lorsque le site propose une charte et des conditions d'utilisation	49%	46%	53%
Lorsque la marque / le nom du site est connu	49%	48%	50%
Lorsque le site est labellisé ou parrainé par un organisme de confiance	42%	42%	42%
Lorsque le propriétaire est clairement identifié	38%	37%	39%
Lorsque c'est payant	35%	35%	35%
Lorsque qu'il est possible de contacter le propriétaire du site par téléphone ou par courrier électronique	22%	21%	23%
Lorsque le site est professionnel d'apparence	17%	17%	17%
Lorsque le catalogue de produits culturels proposés est large	9%	9%	9%
Autres	2%	2%	1%
Je ne sais pas	16%	13%	19%

VIII. 75% of web users spend on average 36 euros per month on cultural assets

- This expenditure includes the purchase of physical cultural assets on the internet (online sales).
- Web users that admit to illegal use spend more on average. The main reasons for not accessing the content legally are price (37%), and choice (21%).



IX. Access trends for paying and non-paying web users

- The main ways of accessing paid-for cultural content are paid platforms (47%), streaming sites or platforms (28%) and direct download sites (23%). Illegal users are over-represented within these three areas.
- Specialised search engines, which provide access to P2P links or direct download links, come in second place (on average) among the free content sources, after streaming.
- The main methods of securing free access preferred by illegal web users are streaming sites (64%), Peer-to-Peer sites (42%) and direct download sites (37%).

X. Although web users support the work of Hadopi, they have doubts about its legitimacy. Mostly, they are waiting to see

- About 45% agree with positive statements about the work of Hadopi which relate essentially to its relevance and its impact on individual behaviour. A third did not give an opinion.
- A third did also not give an opinion on negative statements about Hadopi which are widely supported and essentially relate to its legitimacy and its supposed effect on illegal use in general.
- A quarter also did not give an opinion on the impact of Hadopi on their behaviour and half think that this will not have an impact on their behaviour. A third of web users that admit to illegal use said they would be willing to use cultural works from sites that observe copyright more regularly .

<http://www.hadopi.fr/>

For more information, please contact
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Full study available for download at [http://www.hadopi.fr/
download/hadopiT0.pdf](http://www.hadopi.fr/download/hadopiT0.pdf)

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