

Advisory Committee on Enforcement

Sixteenth Session

Geneva, January 31 to February 2, 2024

CONSUMPTION BEHAVIOR OF PIRATED COPYRIGHT WORKS – EXECUTIVE SUMMARY*

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ABSTRACT

The purpose of this research is to achieve a comprehensive understanding of consumers with regard to copyright piracy in Indonesia and Thailand. It identifies the product categories that are most pirated in both countries. Further, it explores the consumption behavior of consumers of pirated works and the most frequent access method and usage frequency in relation to each product category. It also reveals the motivational drivers for using pirated works and the perceived quality of pirated works in comparison with original copies. This research unveils consumer attitudes towards pirated works in general and reports attitude differences among consumers and non-consumers of pirated works. In addition, this research uncovers the reasons why non-consumers of pirated works deliberately choose not to access them and identifies the influential factors that discourage consumers from knowingly acquiring pirated works. Important implications, informed by the findings of this research, are also reported.

* This study was undertaken with the aid of funds provided by the Ministry of Culture, Sports and Tourism of the Republic of Korea (MCST). The full study is available (in English) at: https://www.wipo.int/meetings/en/details.jsp?meeting_id=76048.

** The views expressed in this document are those of the authors and not necessarily those of the Secretariat or of the Member States of WIPO.

I. INTRODUCTION

1. Piracy has been a global issue for many years and remains prevalent both online and in the offline marketplace. The scale of piracy can vary significantly through different countries as well as across product categories.
2. To eliminate piracy, it is important to develop a comprehensive understanding of the ongoing worldwide issue that is also country- and product-specific. Building on a study carried out in 2021 by the World Intellectual Property Organization (WIPO), which assessed consumer attitudes towards piracy and behavior in the Philippines, this current research investigates consumers in regard to piracy in Indonesia and Thailand, both of which have been considered to be markets of concern for piracy.

II. SIMILARITIES AMONG THE KEY FINDINGS OF THAILAND AND INDONESIA

3. Use of pirated works remains prevalent among consumers in both countries. The popularity of pirated works varies depending on product categories. Among the four tested product categories, movies are the most pirated.
4. For consumers who knowingly use pirated works, the most often used access method varies depending on product categories, namely music (unofficial user-created sites on YouTube), movies (unofficial websites), TV channels (unofficial streaming websites) and computer software (apps or services on a device). Consumers find most pirated works via search engines such as Google.
5. More than 10 percent of consumers use pirated works more than once a month.
6. Perceived poor value for money of subscription is the most prominent reason for consumption of pirated copies for music and movies/TV programs/TV channels; for computer software it is affordability.
7. More than 50 percent of consumers who use pirated copies believe pirated computer software is either the same or better quality than the genuine copy.
8. The majority of consumers who do not use pirated copies have confidence in differentiating unofficial sites from official sites.

III. DIFFERENCES IN THE KEY FINDINGS OF THAILAND AND INDONESIA

9. In Thailand, male consumers are more likely than females to knowingly use pirated works. In Indonesia, female consumers are more prone to use pirated copies than male consumers across all product categories except for computer software.
10. There are some age differences regarding piracy prone consumers between the two countries. Specifically, in Thailand, consumers aged below 30 are more inclined to use pirated works. In contrast, Indonesian consumers aged between 30 and 39 are more likely to use pirated copies than consumers of other age groups, including those aged below 30.
11. Compared with Indonesian consumers, more Thai consumers who use pirated works believe that pirated music/movies/TV programs and TV channels are worse quality than original copies.

12. The scale of deceptive piracy is higher in Thailand than in Indonesia because, compared with a 33 percent chance for Indonesian consumers, there is an approximate 50 percent chance that Thai consumers who do not use pirated works would encounter them unintentionally.

13. The most prominent reasons for avoiding pirated music, movies/TV programs and TV channels are different between Thai and Indonesian consumers. It is having a subscription to the original service/copy for the former and quality concerns for the latter.

14. Regarding computer software, the most prominent reason for avoiding pirated copies is feeling bad/guilty for Thai consumers and quality concerns for Indonesian consumers.

15. There are some significant attitudinal differences (e.g., perceived benefits, judgements, harm and perceptions) toward piracy between Indonesian consumers and non-consumers of pirated works. As regards Thai consumers, there are not many attitudinal differences between consumers and non-consumers of pirated works.

16. The most influential factor that would discourage Indonesian consumers from knowingly acquiring pirated works is cheaper price of original copies. For Thai consumers it is greater convenience of original copies.

IV. CONCLUSION

17. Despite all the effort from stakeholders, copyright piracy remains prevalent in both Thailand and Indonesia and some consumers still do not fully appreciate the differences between piracy and counterfeiting. Additional to the similarities in the key findings, this research reveals some substantial differences between the two countries in regard to copyright piracy from the perspective of consumers. Variations across product categories are also identified. To this end, policies and anti-piracy strategies aimed at eliminating consumer piracy should take into account product category and consumer characteristics, as well as national level differences.

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