

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

Sunday 23 January 2011

Hadopi

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et la protection des droits sur internet

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METHODOLOGY

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Objectives

In order to find out the level of familiarity of French web users with the law, and to better understand their habits in relation to the legal and illegal use of cultural assets and their reactions to it, a first measuring point was established in the form of a photograph at moment T (Study T0).

There is a dual objective to this study:

- **Make an initial assessment of the perceptions and practices of web users** concerning the legal and illegal use of cultural assets, assess their level of familiarity with the law and the consequences of legal and illegal internet use.
- **Assess their level of awareness and familiarity with Hadopi and its objectives.**

Methodological approach

To meet the objectives, an online quantitative study was conducted on **two independent representative samples of the French web-user population (i.e. currently 67% of the French population aged 15 and over according to the Profiling study performed by Ipsos Média in October 2010, and 70% of the French population aged 11 and over according to Médiamétrie July 2010).**

The quality of the access panel is essential. The respondents were recruited using a quota method, and the resulting sample is very representative in terms of the socio-demographic profiles of the web users.

In the first sample, analysis of the study results allows us to establish a declarative summary of the perceptions and practices of web users concerning the legal and illegal usage of cultural assets, and to assess their level of familiarity with the law and the consequences of legal and illegal internet use.

This summary also allows us to assess how aware and how familiar French web users are with Hadopi.

Methodological approach

In the second sample, not all of the questions about the legal and illegal use of cultural assets were asked to avoid potential effects of such questioning on the rest of the questionnaire.

The aim here is not to directly ask respondents to summarise their personal use, but to measure the perception they have of other French web users.

This second sample allowed us to check that the responses given about the use of paid content, free content, illegal use, barriers to legal use and the perception of Hadopi and its work are not influenced by responses given on illegal use by those questioned.

This allows an assesment to be made on the **practices and perceptions of web users in terms of legal and illegal access to cultural content on the Internet.**

Methodological approach

Hadopi has asked four expert service providers to help implement this first phase of the assessment.

Laurent FLORES, PhD in Management Sciences (marketing), Research Professor at *Université Paris II – Panthéon Assas* and founder of the market survey company [cmmetrix](http://cmmetrix.com). He is a recognised Internet survey specialist and supervised the methodology and the initial data processing.

Guillaume MAIN, a statistics consultant and blogger at statosphere.fr, ensured that there was no bias either in the semantics used in the questionnaire, the methodology used to draw the sample population questioned or in producing the conclusions.

TOLUNA, an on-line Access Panel specialist, conducted the interviews on its Access Panel.

SOCIO Logiciels, for 35 years this company has specialised in survey data processing, and was responsible for the quality of the data results and analysis.

Data collection method: online

The interviews were conducted on an online access panel, from 25 October to 4 November 2010, by TOLUNA, on a representative sample of French web users (according to the quotas of the Credoc study, June 2009), aged 15 and over.

2687 individuals were questioned; they were distributed over 2 samples:

- **Sample 1: 1624 web users** assessed their personal habits concerning the illegal use of cultural assets, then the habits of French web users in general (projective questions).
- **Sample 2 – control sample: 1063 web users** assessed the habits of French web users concerning the illegal use of cultural assets.

To ensure the representativeness of the target population, quotas were set for both samples according to the following criteria: gender, age, professional category of the main householder and place of residence. Sample 1 (1600) is almost twice the size usually used for a national representative sample (800 to 1000) so that reliable analyses can be made on the sample fractions.

So that the results can be compared, **both samples are matched** in terms of gender, age, professional category, place of residence, household size, frequency and history of internet use and type of home internet connection.

Statistical data analysis

SOCIO Logiciels was responsible for the quality of the results using various processes:

- **Effectiveness of data recovery**
- **Data cleaning**
- **Validation of the results**
- **Statistical processing and detailed analyses**

Industry rules were adhered to during the processing of this data, especially the confidentiality and anonymity of individual data (principle of individual interchangeability: the individual in question as a representative of individuals with the same socio-demographic and behavioural characteristics).

Statistical data analysis

1. Effectiveness of data recovery

Data was recovered at two levels:

- Matching of 2 samples to make them comparable on internet usage frequency questions.
- Recovery on the population of origin, on the following quotas: gender, age, professional category of the respondent and place of residence.

This usually results in a **minimum weight of 0.66 and a maximum weight of 1.43**. This avoids some individuals weighing a lot more than others, which can be a problem, especially in tables on small sub-populations.

2. Data cleaning

This was done using an outlier search ("atypical individuals" or "incoherent in their responses"), and "monotonous" individuals.

The 4 outliers identified were considered as "off-screen" in this survey.

3. Validation of the results

The overall results gave rise to a systematic verification on each question.

Statistical processing and analyses

Some of the cross tabulations (question depending on another question, or variable modalities) have been produced, for which the main results can be found below, with regard to their discriminating characteristic on one or other sub-population.

Type of internet users:

- **Users admitting to illegal use, i.e. 49%** = web users that have stated that they have illegally accessed cultural products on the internet at least once.
- **Users stating legal use, i.e. 51%** = web users that have stated that they have never illegally accessed cultural products on the internet.

Profiles:

- **Gender and Age** (15-24 / 25-39 / 40 and over)
- **Professions and Socio-professional categories:**
 - Professional category +** = Farmer, Artisan, Shopkeeper, Entrepreneur, Executive, Academic professionals, Middle managers.
 - Professional category -** = Employee, manual workers
 - Non-working population** = Retired, Student, Pupil, Other non-workers.
- **Place of residence** (Paris, Paris Metropolitan Region / Provinces).

NB: Crossings were validated using statistical tests (CHI2, Student).

Quality of gross samples

Q1 - You are	TOTAL	SAMPLE 1	SAMPLE 2
Q1 - SEX			
A man	49%	50%	48%
A woman	51%	50%	52%
Q2 - AGE			
age 15 - 17	13%	14%	12%
age 18 - 24	13%	13%	13%
age 25 - 39	29%	29%	30%
age 40 - 59	33%	33%	33%
age 60 and over	11%	11%	12%
Q3 - Profession			
Professional category+	31%	32%	30%
Professional category-	29%	28%	30%
Non-working population	40%	40%	40%
Q4 - Region			
Paris - Paris Metropolitan Region	20%	21%	18%
Provinces	80%	79%	82%
Q5a - How often do you use the internet?			
Many times a day	77%	77%	78%
1 - 2 times per day	20%	21%	19%
2 - 3 times per week	2%	2%	3%
Once a week	0%	0%	0%
2 - 3 times per month	0%	0%	0%
1 time per month	0%	0%	0%

Very high sample quality – no difference in terms of descriptors or internet usage frequency.

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Spontaneous awareness of authorities or laws which regulate the Internet

Hadopi was cited spontaneously by a third of users, far more frequently than other internet regulation authorities.

In your opinion, what are all the bodies or laws that regulate the Internet? UNPROMPTED	TOTAL	Illegal use	Legal use
TOTAL	100%	100%	100%
HADOPI	32%	34%	31%
CNIL	8%	7%	8%
CSA	2%	3%	2%
ARCEP	1%	1%	1%
ARJEL	1%	1%	1%
Other / Don't know	69%	68%	69%

100% refers to the overall respondents and not the sum of the responses

Assisted awareness of Hadopi

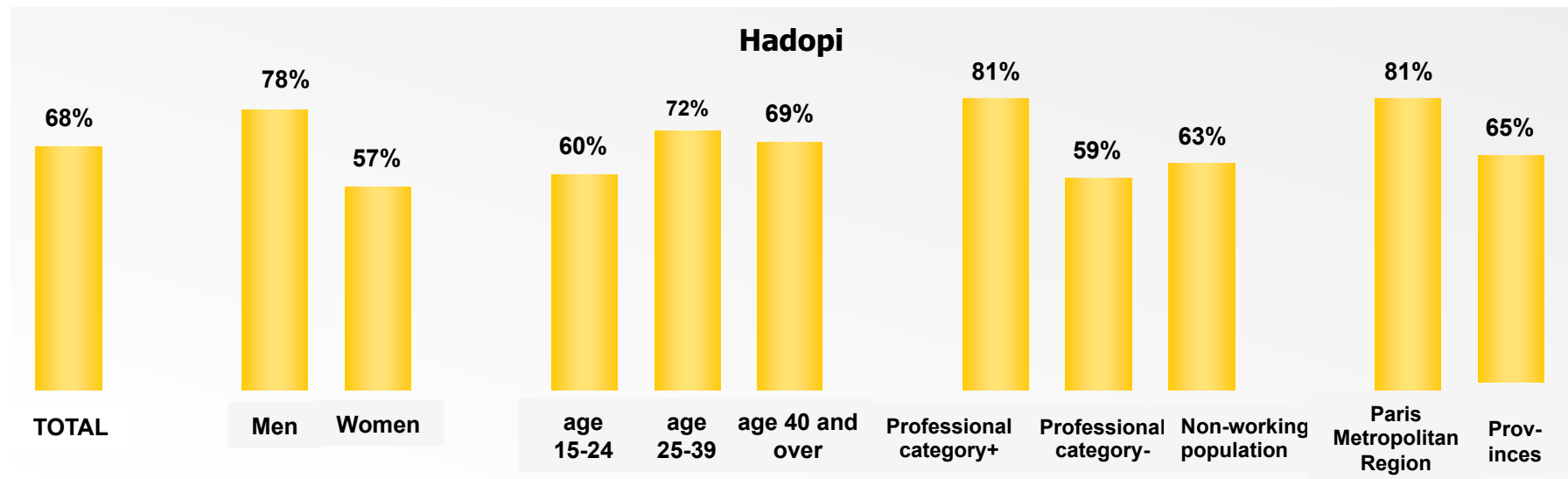
Hadopi enjoys very strong assisted awareness in the area of Internet regulation (68%) at the same level as other, older authorities.

Hadopi came in first position among web users admitting to illegal internet use (70%), and the opposite is true among self-declared legal users (2nd position).

Which of the following bodies that regulate the Internet do you know, even if only by name?	TOTAL	Illegal use	Legal use
<i>TOTAL</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
Hadopi - High authority for the circulation of works and rights protection on the Internet	68%	70%	65%
The CSA - High audiovisual council	67%	64%	71%
The CNIL - National computing and freedoms commission	64%	62%	67%
The ARCEP - Electronic and postal communications regulatory authority	12%	14%	10%
The ARJEL - Online games regulatory authority	10%	12%	8%
None of these	12%	12%	11%

Assisted awareness of Hadopi by profile

Strong assisted awareness of Hadopi among men (78%), those aged 25-39 (72%), Professional category + and Paris Metropolitan Region residents (respectively 81%).



Assisted awareness of Hadopi by profile

Which of the following bodies that regulate the Internet do you know, even if only by name?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
<i>TOTAL</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Hadopi - High authority for the circulation of works and rights protection on the Internet	68%	78%	57%	60%	72%	69%	81%	59%	63%	81%	65%
The CSA - High audiovisual council	67%	69%	65%	54%	70%	74%	78%	64%	61%	72%	67%
The CNIL - National computing and freedoms commission	65%	67%	62%	47%	70%	72%	78%	59%	57%	76%	62%
The ARCEP - Electronic and postal communications regulatory authority	12%	19%	5%	11%	16%	11%	19%	8%	9%	21%	10%
The ARJEL - Online games regulatory authority	10%	15%	5%	11%	11%	9%	13%	7%	10%	14%	9%
None of these	12%	8%	16%	19%	9%	9%	5%	14%	16%	7%	13%

Assisted awareness of Hadopi by profile

Assisted awareness of Hadopi is greater among men (78% vs. 68% on average), those aged 25-39 (72%), Professional categories+ and Paris Metropolitan Region residents (respectively 81%).

Awareness of the CSA is greater among those aged 40 and over (74% vs. 67% on average) and those aged 25-39 (70%) as well as among Professional categories + (78%).

Awareness of the CNIL is greater among those aged 40 and over (72% vs. 65% on average) and those aged 25-39 (70%) Professional categories + (78%) Paris Metropolitan Region residents (76%).

Awareness of Hadopi

Most of those surveyed became aware of Hadopi by watching the television (61%). However, web users admitting to illegal use were also made aware of it by the press (46%), the Internet (37%) and their friends and family (14%).

How did you hear about Hadopi ?	TOTAL	Illegal use	Legal use
<i>TOTAL</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
On television	61%	62%	60%
In the press	41%	46%	36%
On the radio	33%	34%	32%
On the Internet	30%	37%	24%
By a friend or family member, or a colleague mentioned it to me	11%	14%	8%
By email	3%	5%	2%
Other	2%	1%	3%
Don't know	20%	18%	22%

Awareness of Hadopi by profile

How did you hear about Hadopi ?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
On the television	61%	68%	54%	54%	66%	63%	68%	57%	58%	66%	60%
In the press	41%	49%	32%	33%	46%	42%	55%	33%	34%	56%	38%
On the radio	33%	41%	25%	23%	39%	35%	46%	29%	24%	41%	31%
On the Internet	30%	39%	21%	31%	33%	28%	38%	25%	28%	36%	29%
By a friend or family member, or a colleague mentioned it to me	11%	12%	10%	17%	13%	6%	11%	11%	11%	14%	10%
By email	3%	4%	2%	4%	3%	3%	3%	4%	3%	3%	3%
Other	2%	2%	3%	3%	2%	2%	2%	2%	2%	1%	2%
Don't know	20%	12%	29%	27%	17%	18%	11%	27%	24%	12%	22%

Awareness of Hadopi by profile

Most internet users have heard of Hadopi as a result of the television, particularly men (68% vs 61% on average), those aged 25-39 (66%), Professional categories + (68%).

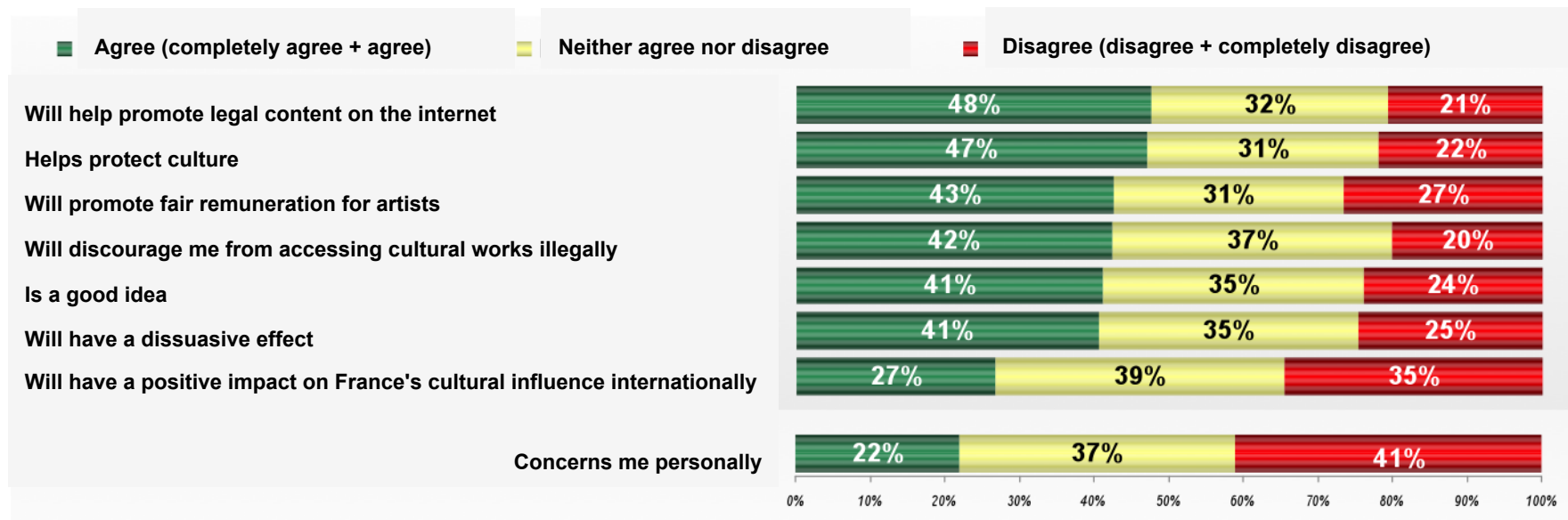
The press comes next, with similar profiles, men (49% vs 41% on average), those aged 25-39 (46%) and Professional categories + (55%) and (56%). The same goes for radio, men (41% vs 33% on average), those aged 25-39 (39%) and Professional categories + (46%).

Younger respondents were more likely to be made aware by their friends and family than other groups (17% vs 11% on average).

Perception of Hadopi

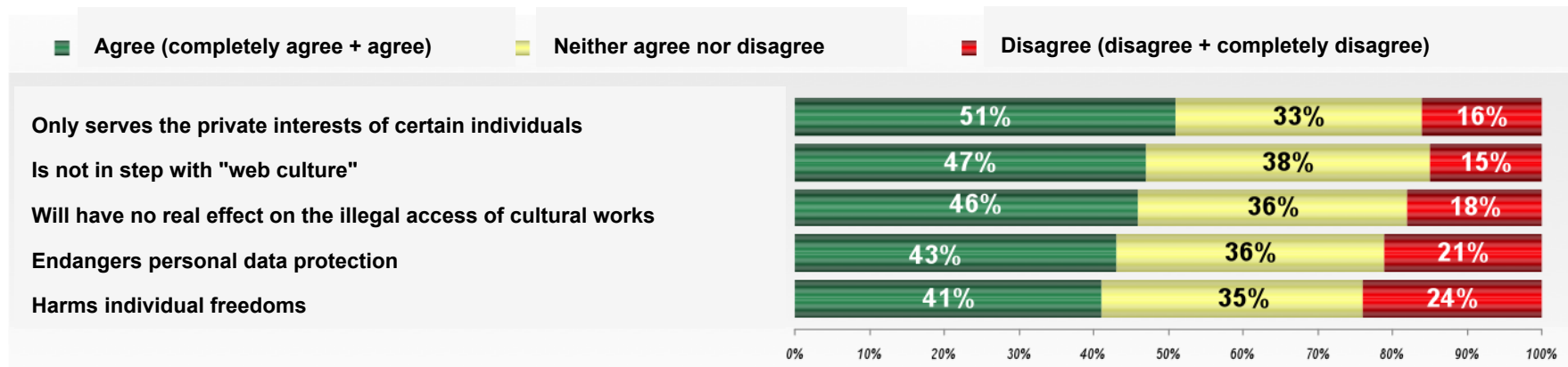
There is significant agreement among web users with positive statements on the work of Hadopi which essentially refer to its relevance and its impact on individual behaviour.

A good third of web users did not answer and a quarter believed themselves to be personally concerned by its work.



Perception of Hadopi

The same proportion of web users did not respond to negative statements about Hadopi which also find significant agreement and essentially concern its illegitimacy and its supposed impact on illegal use in general.



Perception of Hadopi

The diverging opinions among web users admitting to illegal use are more marked in response to the statements concerning "*private interests*" (57%), the "*web culture*" (55%), "*individual freedoms*" (51%) and "*personal data protection*" (51%). They feel more concerned (26%) than those that claim to use the internet legally.

Here is a list of statements which could apply to HADOPI (Completely agree + agree)	TOTAL	Illegal use	Legal use
TOTAL	100%	100%	100%
Will help promote legal content on the internet	48%	43%	52%
Helps protect culture	47%	40%	53%
Will discourage me from accessing cultural works illegally	42%	39%	46%
Will promote fair remuneration for artists	42%	36%	49%
Is a good idea	41%	33%	49%
Will have a dissuasive effect	41%	40%	41%
Will have a positive impact on France's cultural influence internationally	26%	23%	30%
Only serves the private interests of certain individuals	51%	57%	45%
Is not in step with "web culture"	47%	55%	40%
Will have no real effect on the illegal access of cultural works	46%	51%	42%
Endangers personal data protection	43%	51%	36%
Harms individual freedoms	41%	51%	32%
Concerns me personally	22%	26%	18%
None of these reasons	11%	10%	12%

Perception of Hadopi by profile

Here is a list of statements which could apply to Hadopi (Completely agree + agree)	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
<i>TOTAL</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Helps promote legal content on the internet	48%	41%	54%	47%	43%	51%	47%	49%	47%	49%	47%
Helps protect culture	47%	38%	55%	49%	37%	52%	42%	45%	52%	46%	47%
Promotes fair remuneration for artists	43%	35%	50%	44%	33%	48%	36%	42%	48%	43%	42%
Will discourage me from accessing cultural works illegally	42%	38%	47%	42%	39%	45%	39%	44%	44%	42%	43%
Is a good idea	41%	33%	49%	41%	33%	47%	36%	42%	45%	41%	41%
Will have a dissuasive effect	41%	39%	42%	42%	36%	43%	37%	42%	43%	42%	40%
Will have a positive impact on France's cultural influence internationally	27%	23%	30%	29%	20%	29%	21%	29%	30%	22%	27%
Only serves the private interests of certain individuals	51%	60%	42%	53%	54%	49%	54%	49%	50%	55%	50%
Is not in step with "web culture"	47%	55%	40%	48%	56%	42%	55%	42%	45%	54%	46%
Will have no real effect on the illegal access of cultural works	46%	49%	44%	52%	46%	42%	47%	43%	47%	50%	45%
Endangers personal data protection	43%	49%	38%	47%	48%	38%	43%	45%	42%	46%	43%
Harms individual freedoms	41%	48%	35%	46%	45%	36%	43%	42%	40%	42%	41%
Concerns me personally	22%	24%	20%	31%	19%	20%	23%	20%	24%	24%	22%
None of these reasons	11%	11%	11%	15%	11%	9%	9%	12%	13%	7%	12%

Perception of Hadopi by profile

Currently, opinion on Hadopi is divided. Those aged 15-24 feel more "*personally affected*" (31% vs 22% on average).

There is a positive perception of the work of Hadopi, particularly among women, who believe that Hadopi "*is a good idea*" (49% vs 41% on average) or "*is useful for protecting culture*" (55% vs 47% on average), those aged 40 and over (respectively 47% and 52%), the non-working population (respectively 45% and 52%).

Inversely, the most sceptical are men, who think that Hadopi "*only serves the private interests of certain individuals*" (60% vs 51% on average) and the youngest respondents. Professional categories + think that the work of Hadopi "*is not in step with web culture*" (55% vs 47% on average), as do residents of the Paris Metropolitan Region (54%), men (55%) and those aged 25-39 (56%).

Impact of Hadopi on the downloading behaviour of web users

Does HADOPI make you likely to change your habits of online access to music, videos, videogames, books, TV series, photos or software?	TOTAL	Illegal use	Legal use
TOTAL	100%	100%	100%
Yes	25%	33%	18%
No	52%	50%	53%
No opinion	23%	17%	29%
Does HADOPI make you likely to access cultural works from sites that obey copyright more regularly?	TOTAL	Illegal use	Legal use
TOTAL	100%	100%	100%
Yes	36%	35%	36%
No	39%	45%	33%
No opinion	25%	19%	31%
Does HADOPI make French web users more likely to access cultural works from sites that obey copyright more regularly?	TOTAL	Illegal use	Legal use
TOTAL	100%	100%	100%
Yes	40%	35%	43%
No	38%	48%	29%
No opinion	23%	17%	28%

On these three points we can see that around a quarter of web users did not respond.

Although half of web users admitting to illegal use do not plan to change their behaviour, a third of them have a positive attitude overall and plan to change their online habits.

They say that they are willing to access cultural works on sites that obey copyright and think that the same applies for all French web users.

The future work of Hadopi will therefore be of utmost importance.

Impact of Hadopi on the downloading behaviour of web users by profile

Does HADOPI make you likely to change your habits of online access to music, videos, videogames, books, TV series, photos or software?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Professional category+	Professional category -	Non-working population	Paris Metropolitan Region	Province
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	25%	25%	25%	30%	24%	23%	24%	25%	26%	26%	25%
No	52%	57%	47%	49%	57%	50%	57%	51%	48%	54%	51%
No opinion	23%	19%	28%	21%	20%	27%	19%	25%	26%	21%	24%

Does Hadopi encourage you to access cultural works from sites that obey copyright more regularly?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	36%	32%	40%	37%	32%	38%	34%	36%	37%	32%	37%
No	39%	46%	32%	39%	47%	33%	44%	37%	36%	44%	38%
No opinion	25%	23%	28%	24%	21%	29%	22%	27%	27%	25%	26%

Does HADOPI make French web users more likely to access cultural works from sites that obey copyright more regularly?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Professional category+	Professional category -	Non-working population	Paris Metropolitan Region	Province
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	39%	37%	42%	38%	34%	44%	38%	40%	40%	39%	39%
No	38%	43%	33%	39%	47%	32%	43%	37%	35%	43%	37%
No opinion	23%	21%	25%	23%	19%	25%	20%	23%	25%	18%	24%

Impact of Hadopi on the downloading behaviour of web users by profile

Web users who did not give an opinion were mainly women (28% vs 23% on average) and those aged 40 and over (27%).

The positive intentions to change behaviour do not seem to apply to any one population more than another, although men tend to be less inclined to change their habits, as are those aged 25-39 and Professional category + (57% vs 52% respectively on average).

When asked about the behaviour of the French population in general (which does not include the respondent), web users, and particularly those aged 40 and over (44% vs 39% on average), have a slightly more positive attitude than when commenting on their own behaviour.

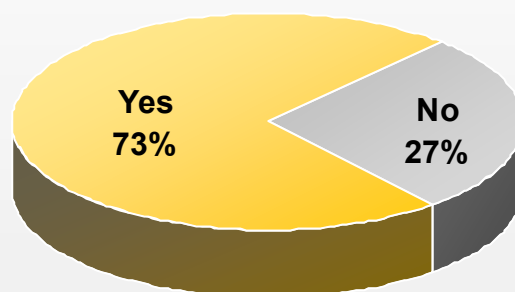
3

SECURITY

Awareness of the need to ensure access security

73% of web users know that they must protect their internet access.

Did you know that, as a web user, you must protect your internet access to avoid it being used for malicious purposes?

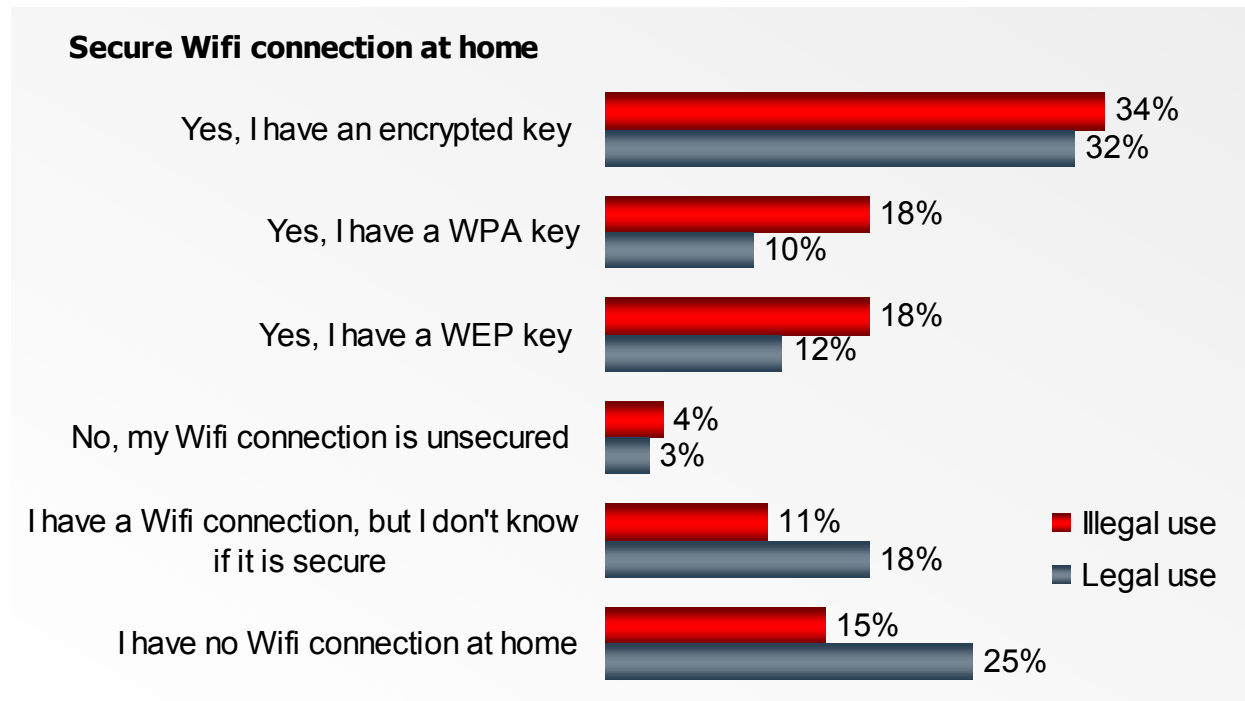


Awareness of the need to ensure access security

Did you know that, as a web user, you must protect your internet access to avoid it being used for malicious purposes?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
<i>TOTAL</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes	73%	75%	72%	75%	73%	72%	73%	71%	75%	73%	73%
No	27%	26%	28%	25%	27%	28%	27%	29%	25%	27%	27%

Awareness of the need to ensure access security

Web users admitting to illegal use are more aware of WiFi security matters (WPA key 18% vs. 10% on average, WEP key 18% vs. 12% on average).



Awareness of the need to ensure access security by profile

Do you currently have a secure Wifi connection at home?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Yes, I have an encrypted key which makes my connection secure	33%	29%	37%	41%	30%	30%	28%	34%	36%	33%	33%
Yes, I have a WPA key which makes my Wifi connection secure	14%	17%	11%	13%	19%	11%	19%	12%	12%	13%	14%
Yes, I have a WEP key which makes my Wifi connection secure	15%	19%	10%	17%	16%	12%	17%	14%	13%	20%	14%
No, my Wifi connection is unsecured	4%	4%	3%	4%	3%	4%	5%	3%	4%	5%	4%
I have a Wifi connection, but I don't know if it is secure	15%	12%	17%	11%	13%	18%	14%	16%	14%	13%	15%
I have no Wifi connection at home	20%	19%	22%	13%	18%	26%	17%	22%	22%	16%	21%

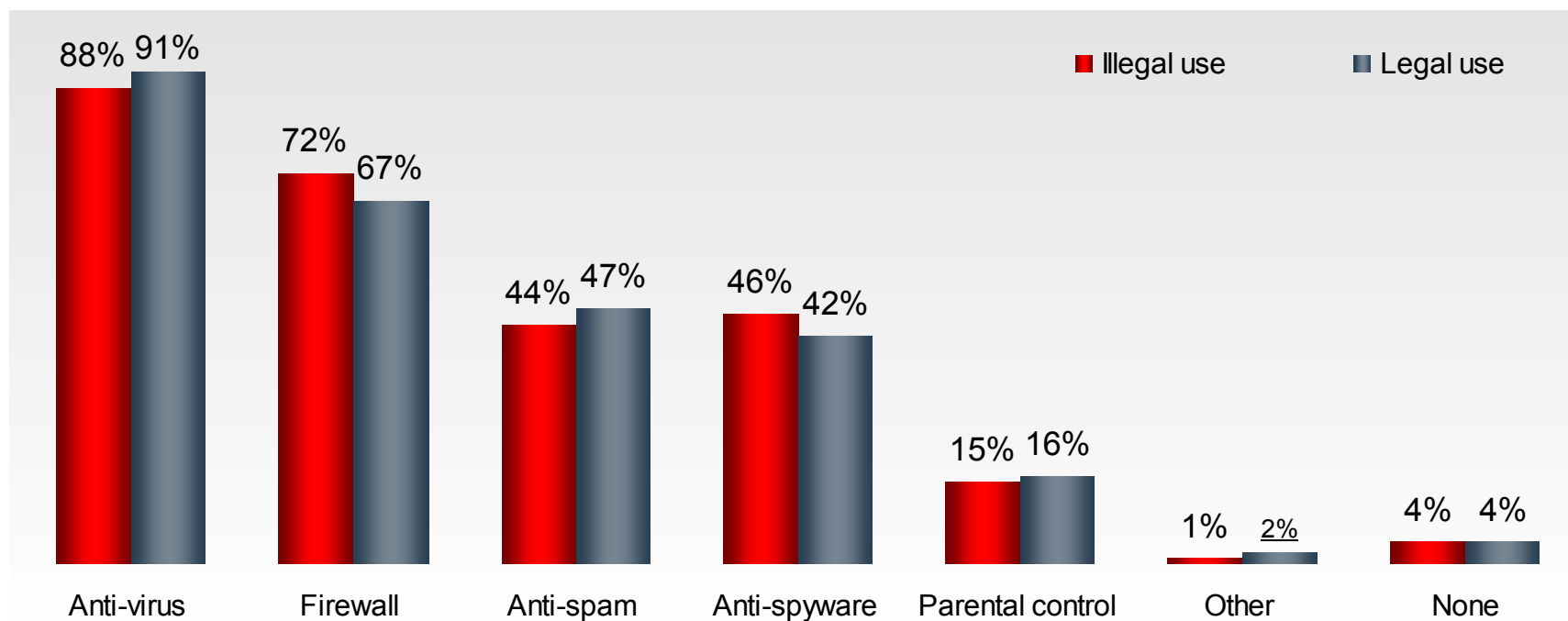
Awareness of the need to ensure access security by profile

The 15-24 age group has the most respondents claiming to have an encrypted key to secure their Wifi connection (41% vs 33% on average). WPA keys are more widespread among Professional category +, those aged 25-34 (19% vs 14% respectively on average), and men (17%).

Those aged 40 and over are more likely to state that they do not have a secure Wifi network at home (26% vs 20% on average), or that they do not know (18% vs 15% on average).

Possession of security devices

Anti-virus software is the most frequently installed means of network protection in the home (around 9 out of 10 web users), followed by firewalls. Anti-spam and anti-spyware programs are also present, but to a lesser extent. There is no difference by type of web user.



Possession of security devices by profile

Which of these security measures have you installed on your home computer?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
<i>TOTAL</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
A firewall	69%	75%	63%	68%	72%	68%	70%	70%	68%	70%	69%
Parental control	16%	15%	16%	16%	17%	14%	12%	19%	15%	13%	16%
Anti-virus	90%	89%	90%	87%	90%	91%	90%	90%	89%	88%	90%
Anti-spyware	44%	53%	35%	45%	43%	45%	47%	41%	44%	47%	44%
Anti-spam	46%	48%	43%	42%	42%	50%	43%	47%	47%	43%	46%
Other	2%	2%	1%	2%	1%	1%	1%	2%	1%	0%	2%
None	4%	4%	4%	5%	4%	4%	4%	4%	4%	6%	4%

| Possession of security devices by profile

93% of web users have anti-virus software, irrespective of population.

Firewalls are more widely used by men (75% vs 69% on average), as is anti-spyware (53% vs 44% on average).

Anti-spam software is more widely used by those aged 40 and over (50% vs 46% on average).

Parental control tends to be more widely used among Professional category- (19% vs 16% on average).

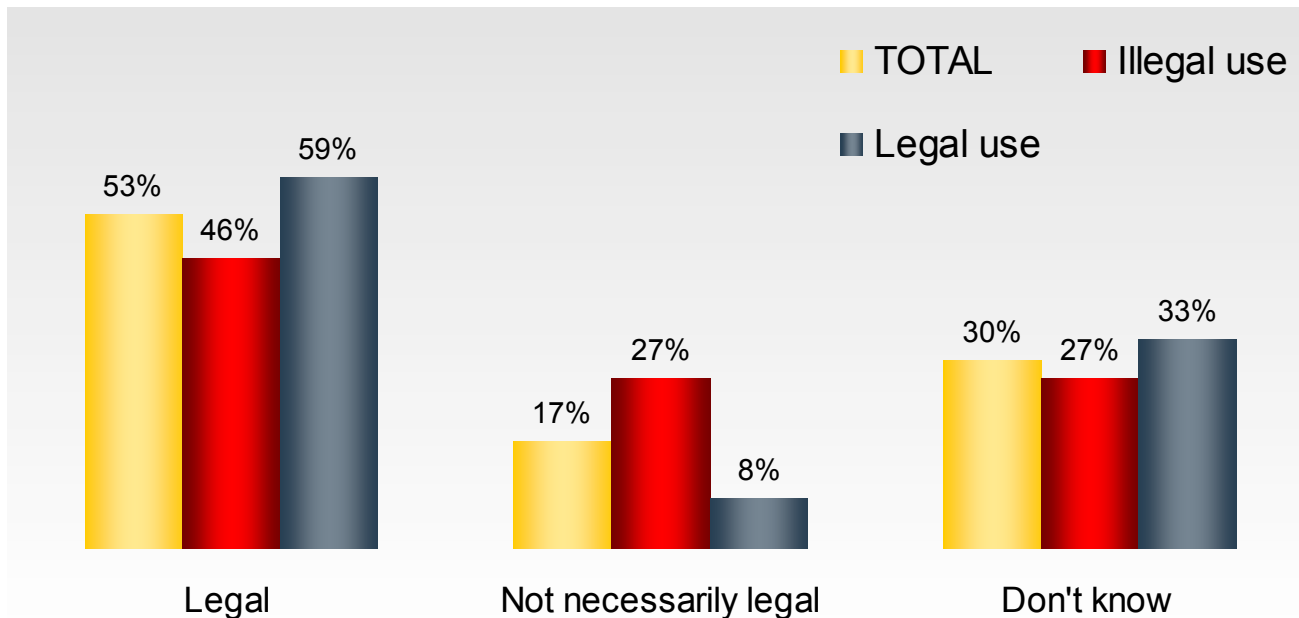
4

ONLINE USE OF CULTURAL ASSETS

Lack of understanding, lack of distinction between legal and illegal offerings, confusion between legal and paid-for

Paying for content guarantees legality according to web users claiming legal use (59% vs. 53% on average), as opposed to web users who admit to illegal use (46%). Users who admit illegal use are more likely to know that paying for content does not make it legal to access (27% vs. 17% on average). Almost a third of internet users "do not know".

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



Lack of understanding, lack of distinction between legal and illegal offerings, confusion between legal and paid-for by profile

When you access cultural content online, if you have paid for this content, do you think that accessing it is:	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Legal	53%	52%	53%	45%	56%	55%	59%	53%	47%	54%	52%
Not necessarily legal	17%	20%	15%	26%	18%	11%	18%	14%	20%	20%	17%
Don't know	30%	28%	32%	29%	26%	33%	24%	34%	33%	26%	31%

Lack of understanding, lack of distinction between legal and illegal offerings, confusion between legal and paid-for by profile

It is those from Professional category+ that make the strongest connection between content being legal and paying for it (59% vs 53% on average), whereas those aged 15-24 seem to be the most well-informed of the nuances ("*not necessarily legal*" 26% vs 17% on average).

Lack of understanding, lack of distinction between legal and illegal offerings, confusion between legal and paid-for

The best guarantees of legality are a charter, familiarity with the name and certification (49% and 42% respectively). The proportion of "don't knows" is slightly higher among web users claiming legal use.

Which of the following indicates to you that a site offering cultural products or services is legal?	TOTAL	Illegal use	Legal use
<i>TOTAL</i>	100%	100%	100%
When the site has a charter and conditions of use	49%	46%	53%
When the brand / name of the site is well-known	49%	48%	50%
When the site is certified or sponsored by a trustworthy body	42%	42%	42%
When the owner is clearly identified	38%	37%	39%
When you have to pay to use it	35%	35%	35%
When it is possible to contact the site owner by telephone or email	22%	21%	23%
When the site looks professional	17%	17%	17%
When there is a large catalogue of cultural products offered online	9%	9%	9%
Other	2%	2%	1%
Don't know	16%	13%	19%

Lack of understanding, lack of distinction between legal and illegal offerings, confusion between legal and paid-for by profile

Which of the following indicates to you that a site offering cultural products or services is legal?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
When the site has a charter and conditions of use	50%	46%	53%	54%	45%	50%	50%	49%	50%	55%	48%
When the brand / name of the site is well-known	49%	50%	48%	50%	49%	49%	53%	49%	46%	58%	47%
When the site is certified or sponsored by a trustworthy body	42%	41%	42%	51%	42%	37%	43%	39%	43%	46%	41%
When the owner is clearly identified	38%	41%	35%	40%	35%	39%	43%	31%	39%	42%	37%
When you have to pay to use it	35%	32%	38%	41%	38%	30%	36%	35%	34%	35%	35%
When it is possible to contact the site owner by telephone or email	22%	22%	22%	27%	20%	21%	21%	20%	24%	24%	22%
When the site looks professional	17%	18%	16%	19%	17%	15%	19%	16%	16%	17%	17%
When there is a large catalogue of cultural products offered online	9%	10%	8%	10%	7%	9%	10%	10%	7%	9%	9%
Other	2%	1%	2%	2%	1%	2%	1%	2%	2%	1%	2%
Don't know	16%	16%	17%	10%	16%	20%	12%	19%	17%	14%	17%

Lack of understanding, lack of distinction between legal and illegal offerings, confusion between legal and paid-for by profile

The presence of a charter is more highly valued by Paris Metropolitan Region residents (55% vs 50% on average), those aged 15-24 (54%) and women (53%).

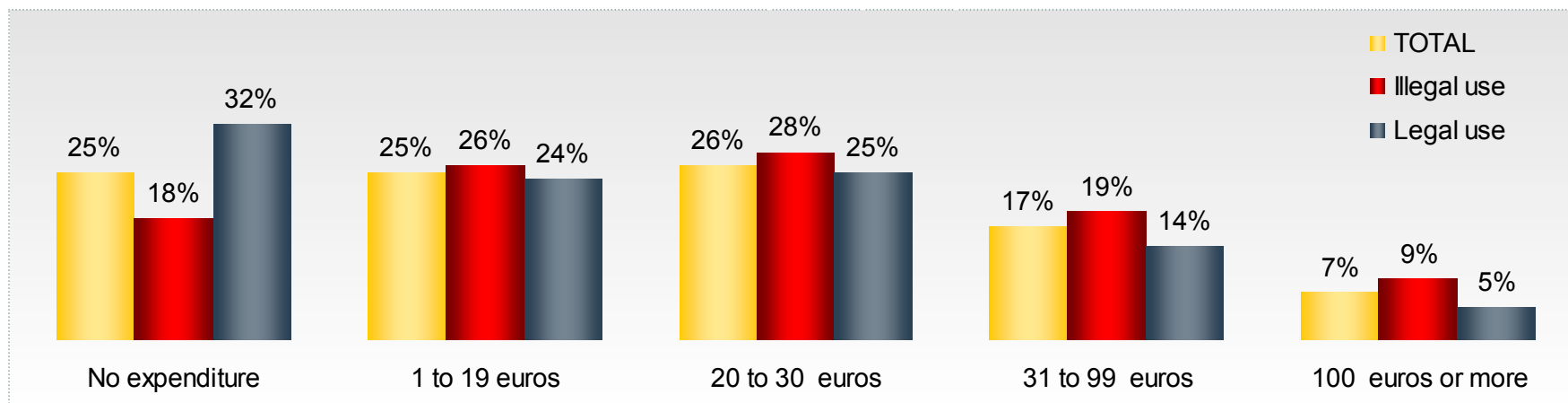
Familiarity with the name is mentioned most frequently by Paris Metropolitan Region residents (58% vs 49% on average) and Professional category+ (53%).

Certification is considered more important by those aged 15-24 (51% vs 42% on average) for whom it occupies 2nd position (vs 3rd on average).

Monthly expenditure on cultural assets

This expenditure includes the purchase of physical cultural assets on the Internet. Web users admitting illegal use spend slightly more than average (+1 to +2 points depending on age group), they are less likely on average to respond "no expenditure". On the contrary, web users claiming legal use spend slightly less (-3 to -1 points depending on age group) and are more likely on average to respond "no expenditure".

Generally, how much do you spend on average per month on accessing cultural products or services on the internet?



Monthly expenditure by profile

Average monthly expenditure is 27 euros for the internet user population as a whole, and 36 euros for the 75% of web users that spend one euro or more.

Generally, how much do you spend on average per month on accessing cultural products or services on the internet?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
<i>TOTAL</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No expenditure	25%	24%	26%	27%	18%	29%	17%	26%	32%	23%	26%
1 - 19 euros	25%	24%	26%	29%	29%	20%	25%	25%	25%	24%	25%
20 - 30 euros	26%	25%	27%	24%	25%	28%	27%	26%	25%	22%	27%
31 - 99 euros	17%	18%	16%	14%	21%	16%	20%	18%	13%	20%	16%
100 euros or more	7%	9%	5%	6%	7%	8%	11%	6%	5%	10%	7%
Average monthly spend	27 €	29 €	24 €	23 €	28 €	28 €	33 €	27 €	21 €	33 €	25 €

Monthly expenditure by declared use

Generally, how much do you spend on average per month on accessing cultural products or services on the internet?	TOTAL	Illegal use	Legal use
No expenditure	25%	18%	32%
1 - 19 euros	25%	26%	24%
20 - 30 euros	26%	28%	25%
31 - 99 euros	17%	19%	14%
100 or more euros	7%	9%	5%

Monthly expenditure by profile

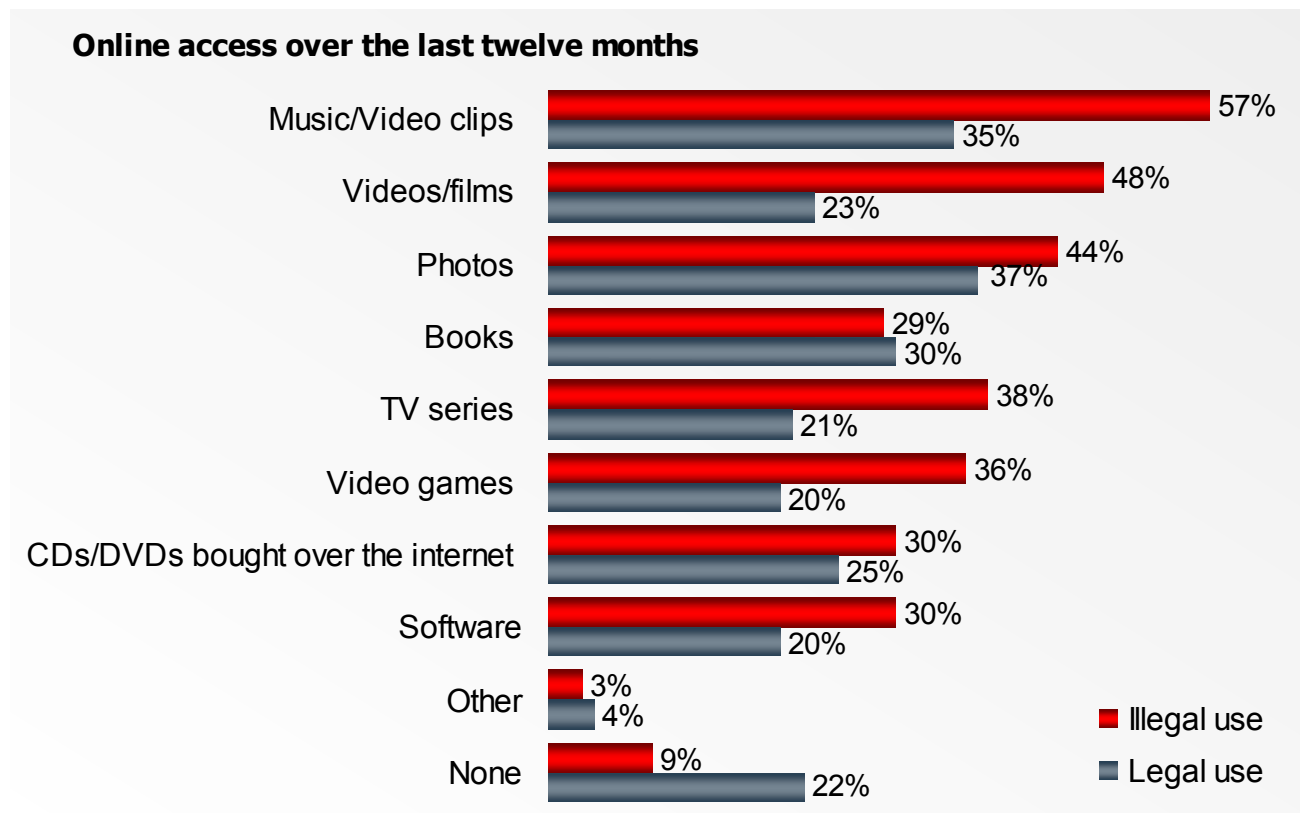
The consumers that spend the most on cultural assets are Professional category+ ("*100 euros or more*" 11% vs. 7% on average) and Paris Metropolitan Region residents (10%).

A third of the non-working population has zero expenditure (32% vs. 25% on average), as do those aged 40 and over (29%).

Those aged 15-24 and those aged 25-39 spend less than the others ("*1 to 19 euros*" 29% vs. 25% respectively).

Type of cultural assets accessed on-line over the last twelve months

Among illegal web users, music is the most frequently-downloaded cultural product (57%), followed by films (48%).



Type of cultural assets accessed on-line over the last twelve months by profile

Which of the following cultural products or services have you already accessed on the internet over the last 12 months?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Music / Videoclips	46%	47%	45%	66%	48%	32%	44%	41%	51%	48%	45%
Photos	40%	36%	44%	48%	43%	34%	39%	40%	41%	42%	40%
Videos / films	35%	37%	33%	56%	38%	20%	34%	30%	40%	41%	34%
Books	30%	27%	32%	23%	36%	29%	37%	29%	24%	32%	29%
TV series	29%	25%	34%	46%	35%	15%	29%	29%	31%	32%	29%
Video games	28%	33%	23%	43%	30%	18%	24%	26%	33%	29%	28%
CDs / DVDs purchased on the internet	28%	29%	26%	25%	32%	26%	34%	28%	21%	32%	26%
Software	25%	32%	17%	28%	23%	24%	28%	21%	25%	31%	24%
Other	4%	4%	4%	1%	3%	7%	5%	3%	3%	4%	4%
None	16%	15%	16%	8%	12%	23%	14%	18%	15%	15%	16%

| Type of cultural assets accessed on-line over the last twelve months by profile

Those aged 15-24 access various cultural assets and access much more content than other groups. Also, the oldest web users are more likely not to access any cultural assets (40 and over: 23% vs 16% on average).

Music is most commonly accessed by: those aged 15-24 (66% vs 46% on average), the non-working population (51%).

Photos: by those aged 15-24 (48% vs 40% on average), women (44%).

Videos/films by: those aged 15-24 (56% vs 35% on average), Paris Metropolitan Region residents (41%), the non-working population (40%).

Books by: Professional category+ (37% vs 30% on average), those aged 25-39 (36%).

TV series by: those aged 15-24 (46% vs 29% on average), those aged 25-39 (35%), women (34%).

Video games: those aged 15-24 (43% vs 28% on average), the non-working population, men (33%)

CDs/DVDs bought on the Internet: by Professional category+ (34% vs 28% on average), Paris Metropolitan Region residents and those aged 25-39 (32%)

Software: by men (32% vs 25% on average), Paris Metropolitan Region residents (31%).

Methods of accessing paid-for cultural content

The main methods used to access paid-for cultural content are paying platforms (47%), streaming sites or platforms (28%) and direct download sites (23%). There is an over-representation of web users declaring illegal use on all three content sources.

Methods of accessing paid-for cultural content	TOTAL	Illegal use	Legal use
<i>TOTAL</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
Paying platforms (iTunes, Amazon MP3, VirginMega, FNAC...)	47%	52%	42%
Streaming sites or platforms (Spotify Premium, Deezer Premium, Allostreaming...)	28%	46%	12%
Direct download sites (MegaUpload Premium, RapidShare Premium...)	23%	36%	11%
Newsgroups (Usenext, Giganews...)	7%	12%	3%
None	33%	19%	47%

Methods of accessing paid-for cultural content by profile

How do you access paid-for cultural content?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Paying platforms (iTunes, Amazon MP3, VirginMega, FNAC...)	47%	47%	47%	48%	51%	44%	52%	45%	44%	52%	46%
Streaming sites or platforms (Spotify Premium, Deezer Premium, Allstreaming...)	28%	31%	25%	46%	30%	16%	30%	27%	28%	29%	28%
Direct download sites (MegaUpload Premium, RapidShare Premium...)	23%	23%	23%	35%	26%	14%	24%	21%	25%	26%	23%
Newsgroups (Usenext, Giganews...)	7%	9%	6%	14%	7%	4%	7%	5%	10%	9%	7%
None	33%	31%	36%	21%	28%	45%	29%	36%	35%	29%	34%

Methods of accessing paid-for cultural content

Paying platforms are more commonly used by Professional category+ and Paris Metropolitan Region residents (52% respectively vs 47% on average).

Those aged 15-24 are more likely to use streaming sites (46% vs 28% on average), direct download sites (35% vs 23% on average) and newsgroups (14% vs 7% on average).

Free sources of cultural content

The main sources of free cultural content preferred by web users declaring illegal use are streaming sites (64%), Peer-to-Peer sites (42%) and direct download sites (37%). Specialised search engines, which provide access to P2P or direct download links, come in 2nd place.

How do you access content on the internet without paying?	TOTAL	Illegal use	Legal use
<i>TOTAL</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
Streaming sites or platforms (Youtube, Dailymotion, Vimeo, Spotify, Deezer, Webradios...)	54%	64%	43%
Specialised search engines	28%	29%	27%
Direct download sites (MegaUpload, RapidShare...)	25%	37%	13%
Blogs, forums, newsletters, personal sites	20%	23%	16%
Instant messaging software (Windows Live Messenger, ICQ...), live dialogue software (IRC..)	19%	20%	17%
Total Peer-to-Peer	25%	42%	8%
<i>Via Peer-to-Peer shareware (eMule, Limewire, Gnutella, eDonkey...)</i>	16%	26%	5%
<i>Via Peer-to-Peer torrent links (BitTorrent, uTorrent, Vuze...)</i>	9%	16%	3%
None	24%	13%	34%

Free sources of cultural content by profile

How do you access content on the internet without paying?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Streaming sites or platforms (Youtube, Dailymotion, Vimeo, Spotify, Deezer, Webradios...)	54%	53%	54%	76%	57%	37%	49%	51%	59%	57%	53%
Specialised search engines	28%	29%	28%	25%	27%	32%	32%	28%	26%	29%	28%
Direct download sites (MegaUpload, RapidShare...)	25%	27%	23%	44%	27%	11%	22%	22%	29%	25%	25%
Blogs, forums, newsletters, personal sites	20%	18%	21%	29%	17%	15%	19%	18%	21%	24%	19%
Instant messaging software (Windows Live Messenger, ICQ...), live dialogue software (IRC..)	19%	16%	21%	24%	16%	17%	14%	19%	22%	18%	19%
Via Peer-to-Peer shareware (eMule, Limewire, Gnutella, eDonkey...)	16%	15%	16%	22%	18%	10%	15%	15%	16%	16%	16%
Via Peer-to-Peer torrent links (Bitorrent, uTorrent, Vuze...)	9%	10%	9%	14%	12%	5%	11%	7%	10%	9%	10%
None	24%	24%	24%	11%	20%	34%	25%	26%	22%	25%	24%

Free sources of cultural content by profile

Those aged 40 and over are most likely to not access cultural assets for free (34% vs 24% on average). However, they are more likely to use specialised search engines (which provide P2P or direct download links), as are Professional category + (respectively 32% vs 28% on average).

Peer-to-Peer sites are most commonly used by those aged 15-24 (36% vs 25% on average) and to a lesser degree, those aged 25-39 (30%). They are used much less by those aged 40 and over (15%).

Streaming sites are most often used by those aged 15-24 (76% vs 54% on average), the non-working population (59%) and those aged 25-39 (57%).

Direct download sites are most often used by those aged 15-24 (44% vs 25% on average) and the non-working population (29%) .

Instant messaging services are most often used by those aged 15-24 (24% vs 19% on average), the non-working population (22%) and women (21%).

Finally, those aged 15-24 make more use of blogs/forums (29% vs 20% on average).

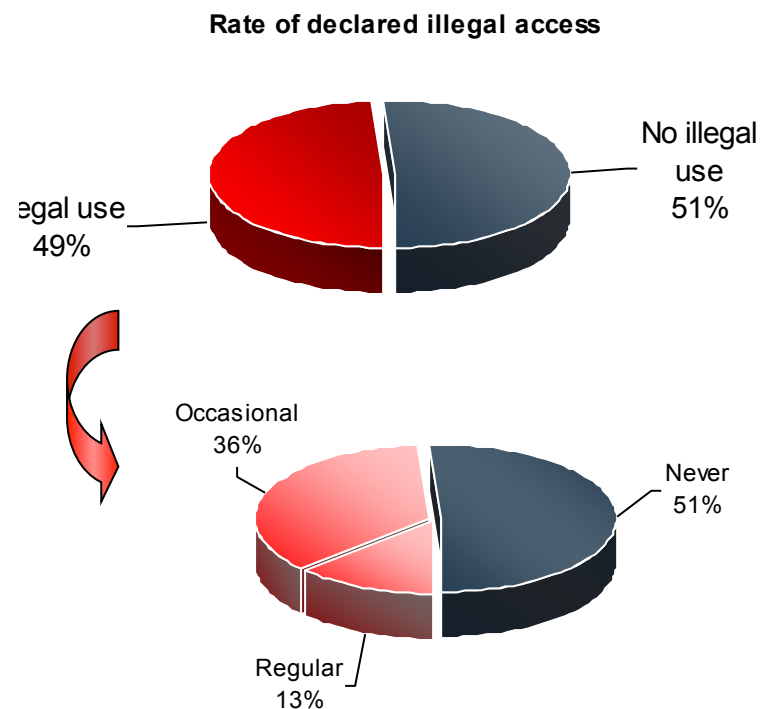
5

ILLEGAL ONLINE USE OF CULTURAL ASSETS

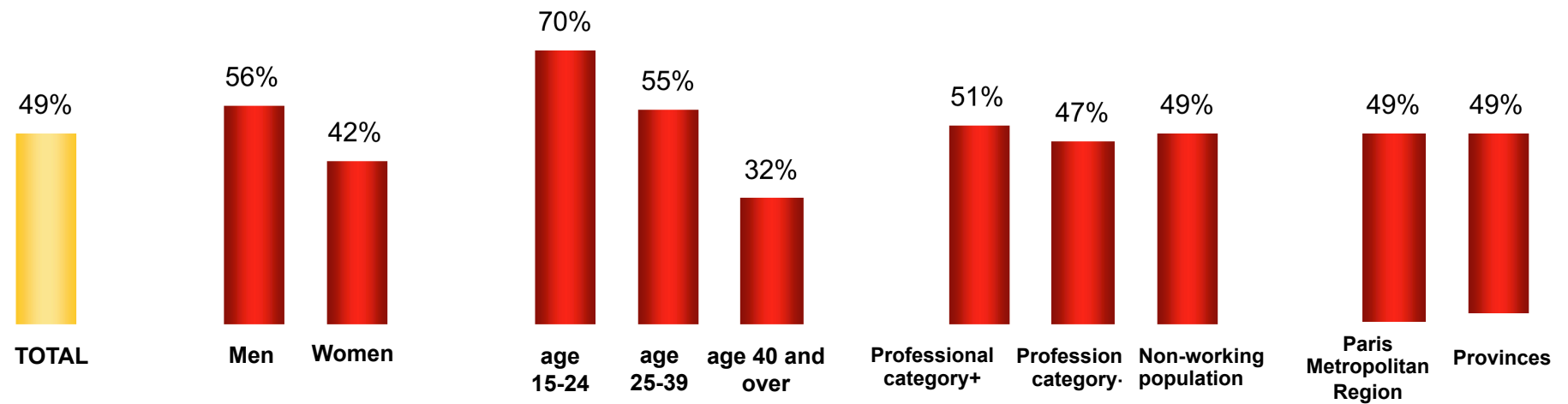
Declared illegal access to cultural assets

Almost half of respondents declared illegally accessing cultural assets (49%), of which 13% do so regularly and 36% do so only occasionally or exceptionally.

	TOTAL
Generally, when you access music, videos, videogames, books, TV series, photos or software on the internet, would you say that you do so illegally?	
TOTAL	100%
ILLEGAL USE (at least once)	49%
Regular illegal use	13%
Of which always	4%
Of which often	9%
Occasional or exceptional illegal use	36%
Of which sometimes	15%
Of which rarely	21%
NO ILLEGAL USE (never)	51%



Declared illegal access to cultural assets by profile



Declared illegal access to cultural assets by profile

Generally, when you access music, videos, videogames, books, TV series, photos or software on the internet, would you say that you do so illegally?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
ILLEGAL USE (at least once)	49%	56%	42%	70%	55%	32%	51%	47%	49%	49%	49%
Regular illegal use	13%	17%	10%	21%	14%	7%	13%	12%	14%	13%	13%
- of which always	4%	5%	3%	6%	4%	3%	4%	4%	5%	5%	4%
- of which often	9%	11%	6%	15%	10%	4%	9%	8%	9%	8%	9%
Occasional or exceptional illegal use	36%	39%	33%	49%	41%	25%	38%	36%	35%	37%	36%
- of which sometimes	15%	19%	11%	25%	17%	7%	14%	16%	15%	16%	15%
- of which rarely	21%	20%	22%	24%	24%	17%	24%	19%	20%	21%	21%
NO ILLEGAL USE (= never)	51%	45%	58%	30%	45%	68%	49%	53%	51%	51%	51%

Declared illegal access to cultural assets by profile

49% of web users admit to illegal use, 13% regularly and 36% occasionally. These are mostly men aged 15 to 39.

Inversely, the group most likely to declare not having accessed content illegally are those aged 40 and over (68% vs 51% on average) and women (58%).

There is no significant difference between professional status or geographical locations.

Declared history of illegally accessing cultural content

A quarter of web users who declared illegal use think that they have been accessing cultural products for over 5 years, 29% said they started to do so *"in the last 6 months"*.

Vous avez répondu qu'il vous arrive de consommer de façon illégale de la musique, des vidéos, des jeux vidéo, des livres, des séries TV, des photos ou des logiciels, depuis combien de temps est ce le cas ?	Usages illicites
<i>TOTAL</i>	100%
Depuis moins de 6 mois	29%
De 6 à 12 mois	10%
De 1 à 2 ans	13%
De 2 à 3 ans	10%
De 3 à 4 ans	6%
De 4 à 5 ans	7%
Depuis plus de 5 ans	25%

Declared history of illegally accessing cultural content by profile

You stated that you illegally access music, videos, videogames, books, TV series, photos or software. How long have you been doing this?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Less than 6 months	29%	26%	33%	36%	22%	29%	19%	32%	36%	28%	30%
6 to 12 months	10%	8%	13%	10%	8%	12%	10%	10%	9%	9%	10%
1 to 2 years	13%	14%	11%	14%	11%	14%	8%	15%	15%	12%	13%
2 to 3 years	10%	9%	12%	10%	10%	10%	11%	10%	9%	6%	11%
3 to 4 years	6%	8%	4%	7%	6%	7%	9%	5%	5%	9%	6%
4 to 5 years	7%	7%	7%	7%	7%	6%	5%	10%	6%	5%	7%
For over 5 years	25%	29%	20%	17%	36%	23%	37%	19%	18%	32%	23%

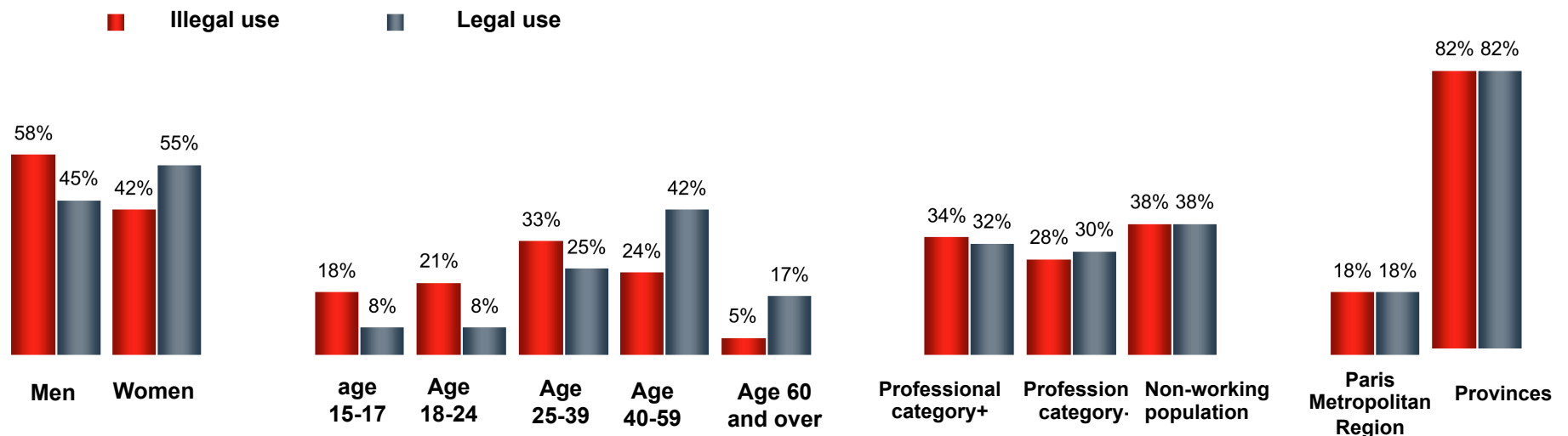
Declared history of illegally accessing cultural content by profile

Web users most likely to admit to illegally accessing cultural assets for less than 6 months are those aged 15-24 and the non-working population (36% vs 29% on average) and women (33%), while those most likely to admit to illegally accessing cultural assets for over 5 years are those in Professional category+ (37% vs 25% on average), those aged 25-39 (36%), Paris Metropolitan Region residents (32%) and men (29%).

Profiles (gender, age, profession and socio-professional category, location)

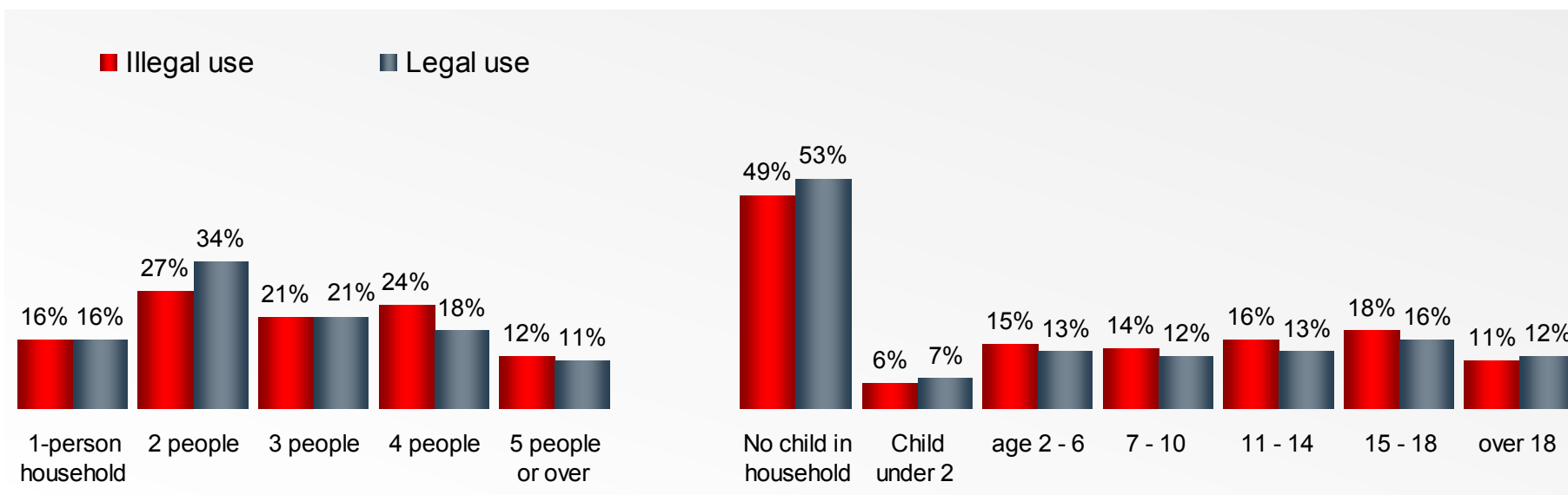
Several profiles are over-represented among web users declaring illegal use: men and those aged 15 to 39. Inversely, web users declaring legal use are mostly women, and they are in the higher age brackets.

There is no difference in terms of socio-professional category or geographical location.



Profiles (household type, age of children)

Web users declaring illegal use are more widely represented in 4-person households, although the age of the children in the household has no influence.



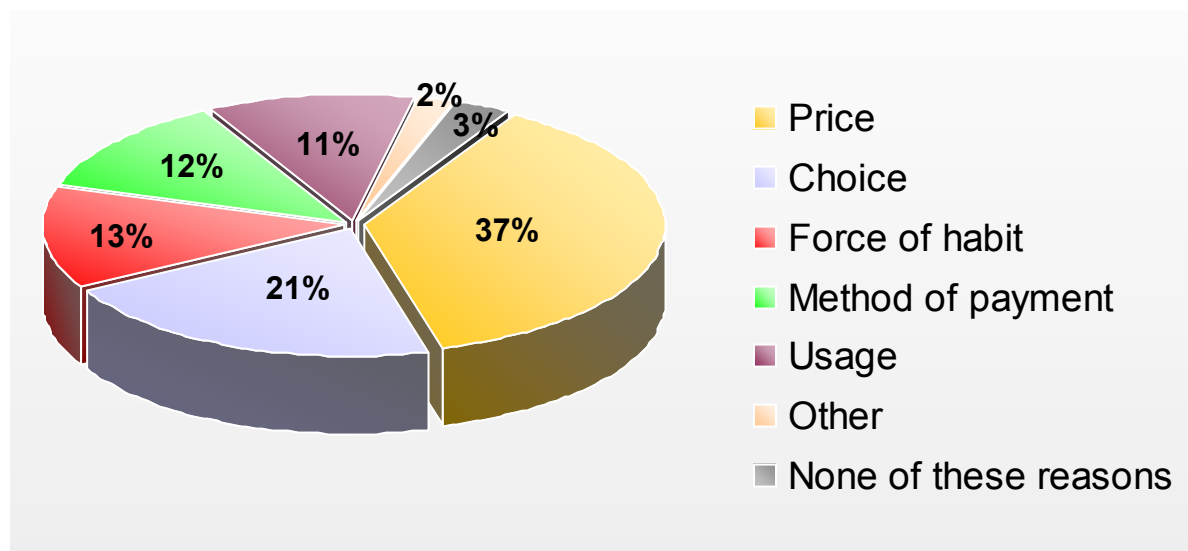
Difference between declared illegal access and perceptions of what the French do

49% of web users said that they accessed cultural assets illegally; however, almost all web users (95%) think that all French web users illegally access cultural assets.

	Generally, when you access music, videos, videogames, books, TV series, photos or software on the internet, would you say that you do so illegally?	Generally, when French web users access music, videos, videogames, books, TV series, photos or software on the internet, would you say that they do so illegally?	Illegal use	Legal use
TOTAL	100%	100%	100%	100%
Always	4%	2%	3%	2%
Often	9%	43%	54%	33%
Sometimes	15%	41%	33%	50%
Rarely	21%	8%	8%	9%
Never	51%	5%	3%	7%

Barriers to legal access

Price is the main barrier to legal access (37%), followed by diversity of the offering (21%) then, at almost the same percentage, the habit of illegal use (13%), payment issues (concerns about disclosing information, lack of online payment system) and usage issues (DRM technologies, ergonomics of the services on offer). (*Detail of barriers to legal access on the following page*).



Barriers to legal access

The main reason stated by web users declaring illegal use (at least one in two) concerns the unit cost of the legal offering (57%) and subscription cost (50%).

For what reason do you not access music, videos, videogames, books, TV series, photos or software legally?	Illegal use		
Unit price is too high	57%	Price	37%
Subscription price is too high	50%		
Offering on sites is too limited	21%	Choice	21%
Not easy to find the work I'm looking for (too new, translations unavailable)	21%		
I cannot discover new releases quickly this way	19%		
Why should I pay for something when I can get it for free?	22%	Habit	13%
By force of habit, I've always accessed content for free	17%		
I'm afraid of disclosing my bank details	26%	Payment method	12%
I have no bank card or other methods of payment (Paypal, gift certificates)	9%		
DRM technologies prevent you from saving or accessing the content on other devices	21%	Usage	11%
The sites are not easy to use	10%		
I don't know of any paid-for, legal sites	7%		2%
None of these reasons	9%		3%

Reasons grouped and percentage re-calculated as 100% of reasons.

All the reasons mentioned are added together = 290% (almost 3 reasons given per individual) and the total is re-percentage over the total of reasons given to estimate the weight of each barrier (cf graph on previous page).

Barriers to legal access by profile

For what reason do you not access music, videos, videogames, books, TV series, photos or software legally?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
<i>TOTAL</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unit price is too high	57%	60%	53%	61%	59%	49%	55%	55%	59%	57%	57%
Subscription price is too high	50%	52%	47%	53%	51%	45%	47%	53%	51%	56%	49%
Offering on sites is too limited	21%	22%	20%	23%	22%	18%	23%	19%	21%	27%	20%
Not easy to find the work I'm looking for	21%	20%	21%	23%	23%	15%	24%	16%	21%	30%	19%
I can't discover new releases quickly this way	19%	22%	15%	20%	23%	15%	21%	16%	20%	28%	18%
Why should I pay for something when I can get it for free?	22%	25%	19%	30%	21%	14%	17%	25%	25%	18%	23%
By force of habit, I've always accessed content for free	17%	20%	13%	22%	18%	9%	17%	14%	19%	21%	16%
I'm afraid of disclosing my bank details	26%	22%	31%	33%	19%	23%	16%	29%	32%	18%	27%
I have no bank card or other methods of payment (Paypal, gift certificates)	10%	9%	10%	18%	4%	4%	2%	5%	19%	6%	10%
DRM technologies prevent you from saving or accessing the content on other devices	21%	26%	14%	18%	27%	18%	27%	17%	19%	29%	19%
The sites are not easy to use	10%	10%	9%	12%	7%	10%	9%	9%	11%	12%	9%
I don't know of any paid-for, legal sites	7%	5%	9%	7%	7%	6%	5%	9%	6%	6%	7%
None of these reasons	9%	8%	10%	6%	5%	17%	10%	11%	7%	9%	9%

Barriers to legal access by profile

Price as a major barrier to legal access is mentioned across the board by all populations.

Lack of choice was cited mostly by Paris Metropolitan Region residents *"not easy to find the content"* (30% vs 21% on average), *"doesn't help you find out about new content"* (28% vs 19% on average).

Force of habit is mentioned particularly by those aged 15-24, but is insignificant among those aged 40 and over: *"why pay for something when I can get it for free?"* (those aged 15-24 30% vs 22% on average / those aged 40 and over 14%) – *"through force of habit I've always accessed content for free"* (those aged 15-24 22% vs 17% on average / those aged 40 and over 9%).

Methods of payment, *"I'm concerned about revealing my bank details"*, are a particular problem for those aged 15-24 (33% vs 26% on average), the non-working population (32%) and women (31%), as is *"I don't have a bank card"* the non-working population (19% vs 10% on average) and those aged 15-24 (18%).

Usages and particularly DRM technologies are mentioned more frequently by Paris Metropolitan Region residents (29% vs 20% on average), Professional category+ and those aged 25-39 (respectively 27%) as well as by men (26%).

Web users' equipment

Web users declaring illegal use are better-equipped, particularly in terms of products such as laptops (68%), external hard drives (53%), games consoles (52%), smartphones (33%) and netbooks (15%).

Which of the equipment below do you own?	TOTAL	Illegal use	Legal use
<i>TOTAL</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
Digital camera	84%	83%	85%
Mobile phone	83%	83%	83%
Webcam	70%	74%	65%
Computer	70%	70%	71%
Laptop	64%	68%	61%
External hard drive	47%	53%	41%
MP3 player (iPod, Archos)	45%	51%	39%
Games console (PS3, Xbox360, Wii)	45%	52%	38%
Portable games console (DS, PSP)	34%	39%	30%
Smartphone (iPhone, Blackberry, HTC)	27%	33%	22%
Portable DVD player	21%	23%	20%
Internet TV	20%	22%	18%
Video player (iPod, Archos)	15%	20%	11%
Netbook or touch tablet (iPad)	12%	15%	10%
PDA (electronic diary)	5%	6%	5%
Electronic book (eBook, Kindle)	1%	1%	1%
None of these products	1%	0%	1%

Web users' equipment by profile

Which of the equipment below do you own?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Digital camera	84%	81%	87%	76%	88%	87%	88%	85%	80%	85%	84%
Mobile phone	83%	78%	88%	81%	81%	85%	80%	87%	82%	82%	83%
Computer	70%	74%	67%	59%	67%	79%	70%	72%	69%	66%	71%
Webcam	70%	71%	68%	72%	69%	69%	71%	69%	68%	72%	69%
Laptop	64%	64%	64%	68%	71%	58%	74%	59%	59%	72%	62%
External hard drive	47%	53%	41%	44%	56%	43%	57%	43%	41%	56%	45%
Games console	45%	46%	43%	57%	53%	32%	45%	50%	41%	47%	44%
MP3 player	45%	44%	46%	57%	47%	36%	46%	44%	44%	49%	44%
Portable games console	34%	32%	38%	42%	41%	25%	33%	39%	32%	33%	35%
Smartphone	27%	35%	19%	27%	34%	23%	40%	23%	20%	40%	25%
Portable DVD player	21%	22%	21%	22%	22%	20%	23%	21%	20%	24%	20%
Internet TV	20%	18%	22%	19%	18%	22%	19%	23%	19%	21%	20%
Video player	15%	18%	13%	24%	12%	13%	17%	13%	17%	19%	15%
Notebook or touch tablet	12%	14%	11%	15%	13%	11%	15%	11%	11%	16%	12%
PDA	5%	7%	3%	4%	4%	6%	9%	3%	4%	12%	4%
Electronic book	1%	2%	1%	2%	1%	1%	2%	1%	1%	3%	1%
None of these products	1%	1%	0%	2%	0%	0%	0%	1%	1%	1%	1%

Web users' equipment by profile

More laptops among Professional category+ (74% vs 64% on average), Paris Metropolitan Region residents (72%) and those aged 25-39 (71%).

More external hard drives among Professional category+ (57% vs 47% on average), Paris Metropolitan Region residents, those aged 25-34 (56%) and men (53%)

More games consoles among those aged 15-24 (57% vs 45% on average), those aged 25-39 (53%) and Professional category- (50%).

More portable games consoles among those aged 15-24 (42% vs 34% on average), those aged 25-39 (41%), Professional category- (39%) and women (38%).

More smartphones among Professional category+, Paris Metropolitan Region residents (40% vs 27% on average), men (35%) and those aged 25-39 (34%).

Frequency of Internet use

77% of web users say that they use the Internet "*many times a day*". This response is more frequent (82%) among those who admit to using the internet illegally.

How often do you use the internet?	TOTAL	Illegal use	Legal use
<i>TOTAL</i>	100%	100%	100%
Many times a day	77%	82%	72%
1 or 2 times a day	21%	16%	24%
2 or 3 times per week	2%	2%	3%

Frequency of Internet use by profile

How often do you use the internet?	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Many times a day	77%	80%	74%	79%	80%	74%	80%	73%	78%	83%	76%
1 or 2 times a day	20%	18%	23%	17%	18%	24%	19%	24%	19%	15%	21%
2 or 3 times per week	2%	2%	3%	3%	2%	2%	2%	3%	3%	2%	3%

What users do on the Internet

Web users admitting to illegal use spend more time on the Internet than the overall sample, accessing cultural assets (65% vs. 55% on average), instant messaging services (63%), social networking sites (60%) and to a lesser extent playing online video games (22%) and participating in forums (19%).

Internet activities engaged in at least once a week	TOTAL	Illegal use	Legal use
<i>TOTAL</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
Send and receive emails with friends and family or colleagues	86%	83%	88%
Look at the news	71%	69%	72%
Look at your bank accounts	58%	60%	56%
Send and receive instant messages (like MSN, Skype) with friends and family	55%	63%	47%
Listen to music, watch videos, read books online	55%	65%	45%
Check your profile page on a social networking site (Linkedin, Facebook, Viadeo, Twitter)	54%	60%	47%
Plan purchases (by looking for practical information)	29%	31%	27%
Buy or reserve products or services online	19%	21%	17%
Play video games online (World of Warcraft, Second Life)	18%	22%	14%
Participate in forums (by leaving comments)	16%	19%	13%
Participate in blogs (by leaving comments)	12%	12%	11%
Create online editorial content (e.g. write an article on a blog)	9%	9%	9%
Upload music / videos, a blog (YouTube, Dailymotion)	8%	9%	6%
Gambling (Poker, sport)	7%	9%	5%
Buy software, videogames online	3%	4%	2%

What users do on the Internet by profile

Internet activities engaged in at least once a week	TOTAL	Men	Women	age 15 - 24	age 25 - 39	age 40 and over	Prof. category+	Prof. category-	Non-working population	Paris Metropolitan Region	Provinces
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Send and receive emails with friends and family or colleagues	86%	84%	87%	71%	91%	91%	94%	86%	78%	90%	85%
Look at the news	71%	75%	66%	48%	77%	80%	81%	69%	63%	79%	69%
Look at your bank accounts	58%	59%	57%	38%	66%	66%	68%	65%	45%	59%	58%
Send and receive instant messages (like MSN, Skype) with friends and family	55%	49%	62%	74%	55%	44%	47%	57%	61%	50%	56%
Listen to music, watch videos, read books online	55%	56%	54%	76%	59%	38%	53%	52%	59%	55%	55%
Check your profile page on a social networking site (Linkedin, Facebook, Viadeo, Twitter)	54%	49%	59%	70%	57%	42%	48%	56%	57%	50%	55%
Plan purchases (by looking for practical information)	29%	30%	28%	19%	33%	32%	35%	29%	23%	33%	28%
Buy or reserve products or services online	19%	18%	20%	11%	24%	21%	28%	16%	13%	26%	17%
Play video games online (World of Warcraft, Second Life)	18%	21%	14%	30%	15%	12%	13%	13%	25%	16%	18%
Participate in forums (by leaving comments)	16%	18%	14%	20%	17%	13%	17%	13%	17%	18%	16%
Participate in blogs (by leaving comments)	12%	12%	12%	18%	10%	9%	10%	10%	15%	12%	12%
Create online editorial content (e.g. write an article on a blog)	9%	9%	9%	12%	6%	9%	12%	7%	8%	10%	9%
Upload music / videos, a blog (YouTube, Dailymotion)	8%	8%	8%	14%	6%	5%	7%	5%	11%	8%	8%
Gambling (Poker, sport)	7%	10%	4%	8%	9%	6%	8%	7%	6%	7%	7%
Buy software, videogames online	3%	5%	1%	4%	3%	3%	3%	3%	3%	4%	3%
None	1%	0%	1%	0%	1%	0%	1%	0%	1%	1%	0%

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CONCLUSIONS

Some conclusions

Hadopi is well-known. Around 45% of web users agree with positive statements on its work (relevance and impact on individual behaviour). Negative statements (illegitimacy and supposed effect on illegal access in general) also attracted widespread support. It is important to note that a third of web users, all questions included, did not give an opinion and are certainly waiting to see what happens.

As far as security is concerned, three quarters of the population know that they must make their Internet access secure; this awareness is greater among those admitting to illegal use.

In terms of the cultural offerings on the Internet, there is some confusion between what is legal and what is illegal, particularly as some illegal services have to be paid for. Certification is the 3rd most important factor determining whether an offering is considered to be legal.

75% of web users spend on average 36 euros per month on cultural assets (including online purchases). Web users declaring illegal use spend more on average. The main barriers to legal use cited are price and choice.

| Some conclusions

Half of web users admit to illegal use (at least once), while 95% of those questioned think that French web users behave illegally. There is, therefore, a significant gap between what is declared and what is projected. Illegal use is concentrated mainly among those aged 15-39 and men, and there is no difference between residents of the Paris Metropolitan Region and the Provinces. The practice is not slowing down and is becoming more diverse.

In terms of equipment, those declaring illegal use are better-equipped in general and particularly as regards external hard drives, smartphones and audio /video players.

In terms of impact, almost half of web users declaring illegal use say that Hadopi will not change their behaviour, while a third would be willing to change and a fifth (17%) gave no response. Hadopi can now start to work in an context of openness.

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

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Hadopi

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