



Nobody's unpredictable



Higher Education Unlicensed Software Experience – Student and Academics Survey









May 23, 2005

Michael Gross, Senior Research Manager



Executive Summary










GOOD NEWS

-  While a significant number of students are using P2P programs to download software, the percentage of students downloading more often has dropped since 2003.
-  Four times as many students as in 2003 report paying for music downloads at least most of the time (28% in 2005 vs. 7% in 2003).
-  The net change in frequency of P2P use (more often minus less often) has dropped 23 points since 2003; two years ago, more frequent use outpaced less frequent 38% to 22% -- currently more frequent use trails by 7 points, 29% vs. 36% using P2P less often.
-  One-third of students say it is not OK to swap or download files without paying for them, compared to only 23% in 2003.
-  Awareness of college/university downloading policies is becoming more widespread among students – nearly half (44%) report their campus has a policy, compared to 28% in 2003.
-  Among students who have heard news about unlicensed software or industry actions against downloaders, 70% report this news has made them less likely to download unlicensed or pirated software.



Executive Summary








WARNING SIGNS

-  Downloading music is a gateway to downloading software. Students who download pirated music are much more likely to download unlicensed software and feel it is OK to download or swap files.
-  Students are taking advantage of high-speed connections on campus –students who use their school’s network to access the internet are more likely to download games, movies, and commercial software using P2P programs.
 -  Students who download commercial software from college and university networks are significantly less likely to ever pay for the software they download.
 -  These students are also more likely to report they are downloading commercial software from P2P programs more often.
 -  Two-thirds (65%) of students report downloading music using P2P programs.
-  Students’ ethical positions on downloading are ambivalent – half (48%) say their likelihood of downloading commercial software using P2P depends on the circumstances.
-  Currently, 61% of the students who download commercial software rarely or never pay for it.
-  Half of students say their likelihood of downloading commercial software from a P2P program depends on the circumstances.
-  Half of students believe that even in the workplace, it is OK to download and swap files no matter what the value.



Executive Summary

FAILING TO COMMUNICATE

-  One-in-five students feel software piracy is OK.
-  Awareness of campus downloading policies is significantly higher among professors and administrators than students.
-  News about unlicensed software and industry actions have a greater effect on student behavior than communications from professors or knowledge of campus downloading policies.
 -  Fewer than half of students say their campus downloading policy is effective – the net effectiveness of these policies (total effective minus total ineffective) has dropped from +23 to +7 since 2003.
-  Very few professors and administrators feel it is acceptable to encourage swapping or downloading software, or installing software on multiple machines, but...
 -  No more than one quarter of students report that professors and administrators actively discourage these behaviors.
 -  While eight-in-ten professors and administrators feel it is unacceptable to encourage these behaviors, fewer than one-third report they actively discourage swapping, downloading or installing software on multiple machines.



Executive Summary

🌐 NEED FOR ADDITIONAL ON-CAMPUS EDUCATION TO PREVENT INCREASED SOFTWARE PIRACY

🌐 Professors and administrators are unanimous in feeling that it's not OK for students to continue to download or swap software files after the graduate from college.

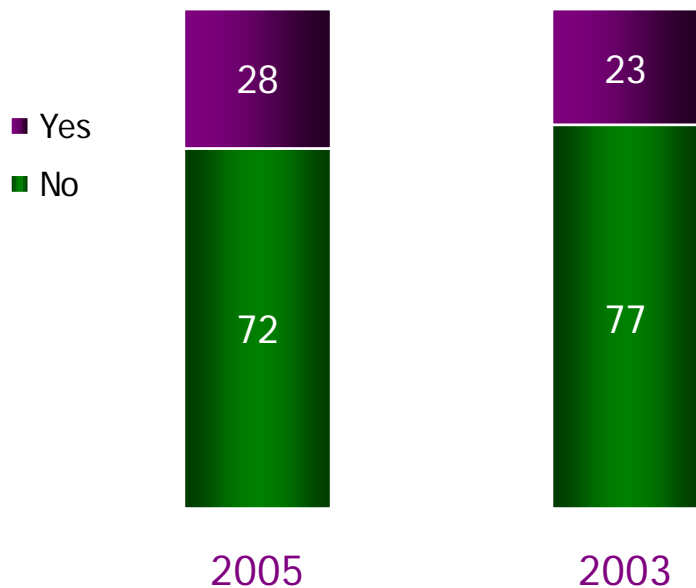
🌐 A strong majority of professors and administrators say that piracy is a real problem and that the commercial software industry should work with colleges and universities to ensure that students obtain their software legally.



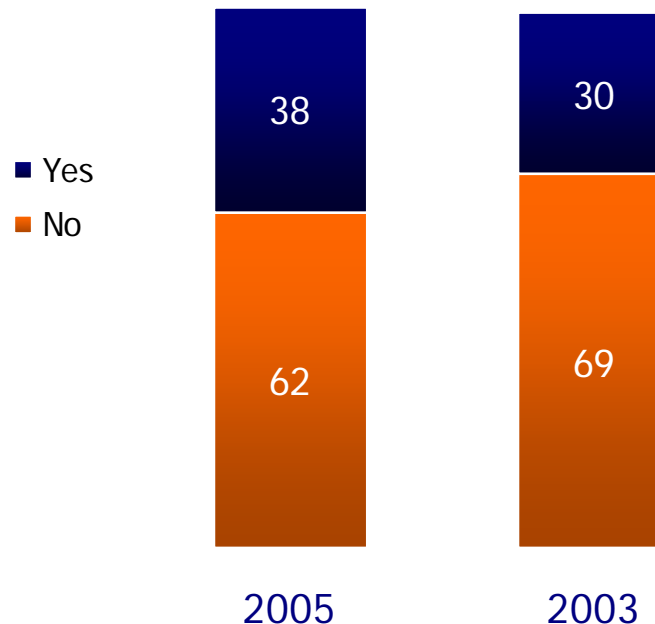
Software Downloading Behavior

Even though software downloads are still relatively uncommon, downloading commercial software has increased among both students and academics since 2003. Among academics, professors (50%) and those aware of P2P (52%) are more likely to report downloading commercial software. Among students, those studying a computer-related subject (41%), who have no problem with swapping files (50%), and who would always P2P software to save money (62%) are more likely to report downloading commercial software.

Students



Academics



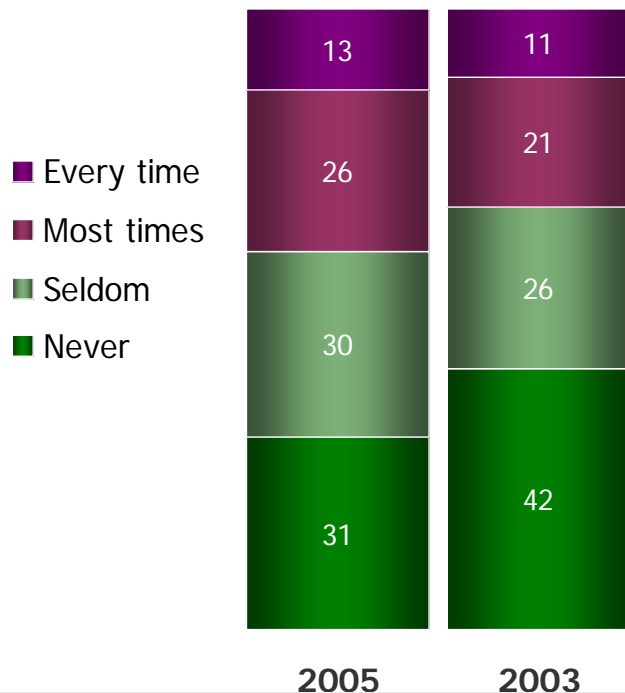
Q. Excluding any commercial software that was made available to you by the college or university based on an arrangement with the software publisher, have you ever downloaded commercial software programs from the Internet or a peer-to-peer file sharing program, whether you had to pay for them or not?



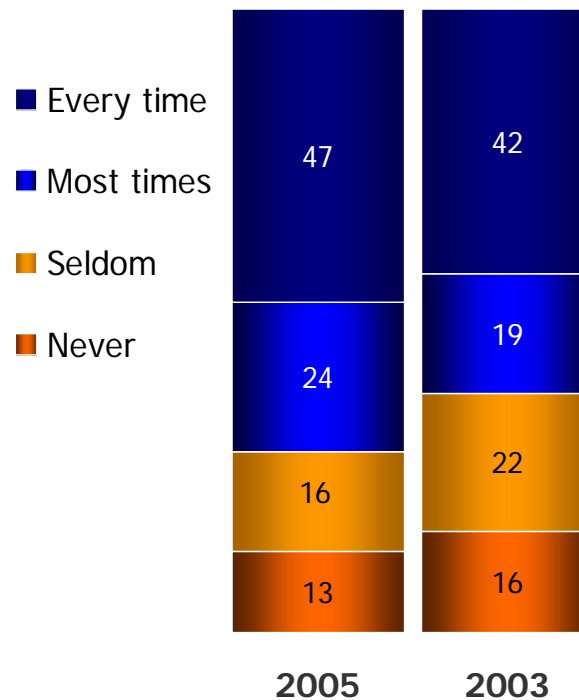
Software Downloading Behavior

While frequency of software downloading has increased, so has the frequency of paying for downloads. Among academics, a strong majority (71%) report paying at least most times, and nearly half (47%) report they pay every time. Frequency of payment among students continues to lag behind, with nearly nine-in-ten (87%) reporting they don't always pay for software downloads – but the number of students who report paying at least most times has increased by seven points (from 32% in 2003 to 39% in 2005). However, students who use their campus network to access the internet, are significantly more likely to report they never pay for software downloads.

Students



Academics



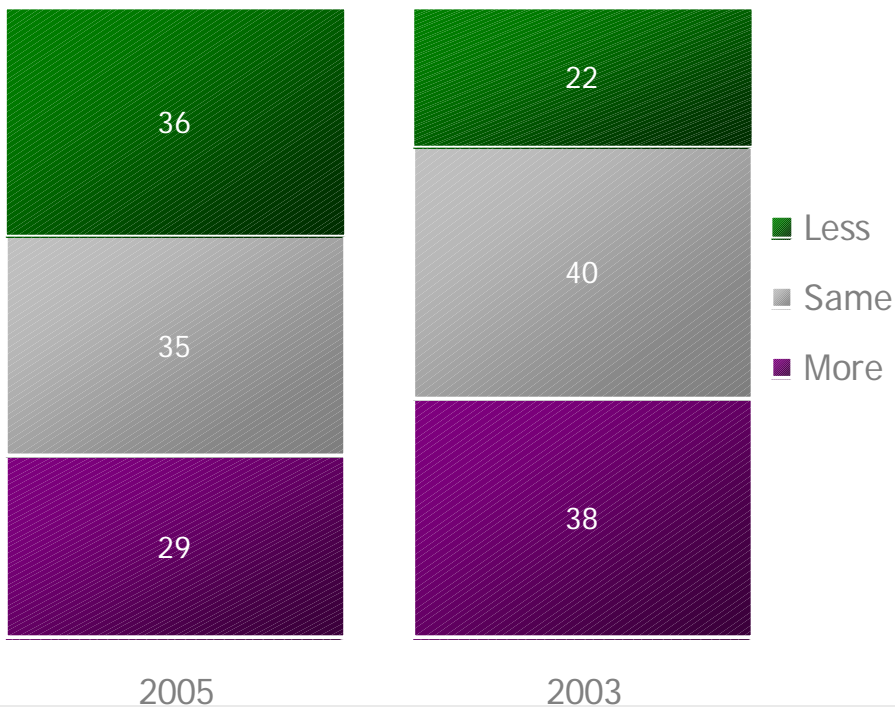
Q. How often do you pay for the commercial software programs that you download—every time, most times, seldom or never?



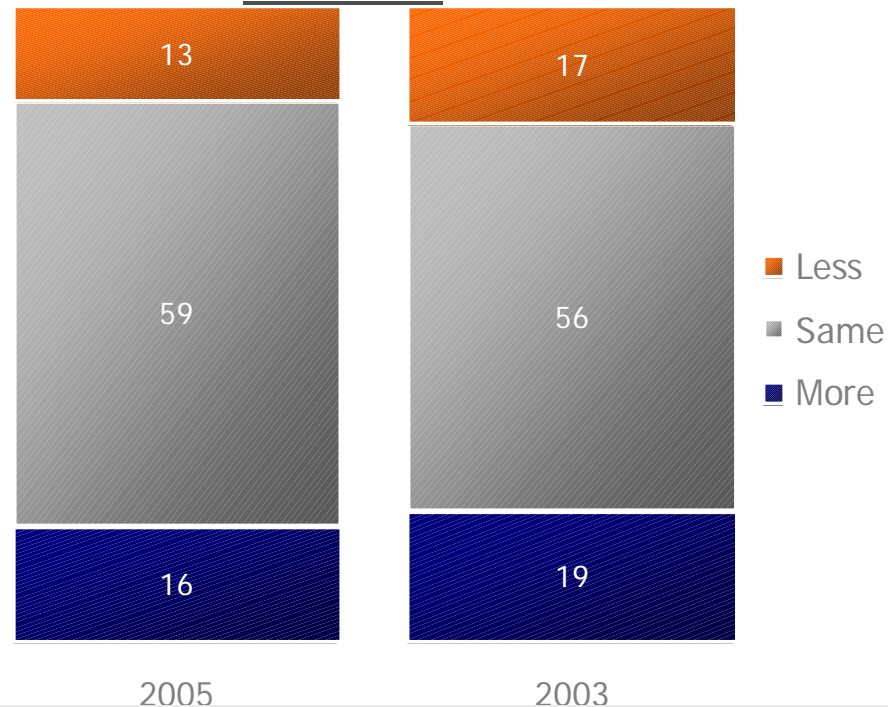
Frequency of P2P Use

Use of P2P file sharing programs to download commercial software is holding steady among academics; among students, P2P use is showing decreases. Fewer students are reporting increases in P2P use and more students are using P2P for commercial software less often. The net change (total more often – total less often) has shifted 23 points since 2003 (from +16 in 2003 to –7 in 2005). College freshmen (42%) are the most likely to report increases in downloading commercial software from P2P programs. Students who use the college/university network (36%) are also more likely to report increased downloading.

Students



Academics

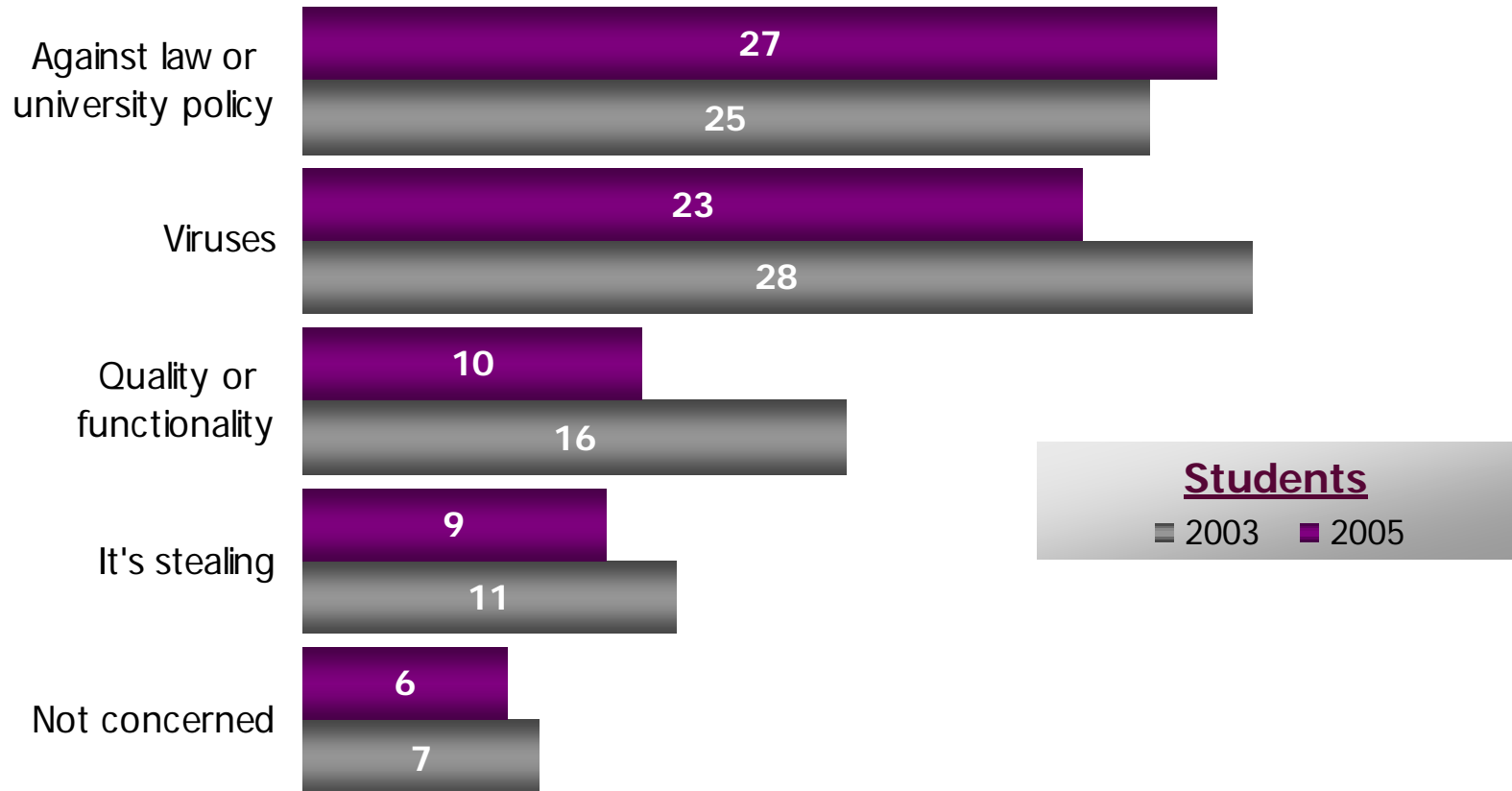


Q. Compared to a few years ago would you say you download commercial software from peer-to-peer file sharing programs more often, less often or with the same frequency?



Concerns with Unlicensed Software

Students have shifted somewhat – concern with the law and university policy is now their top concern, although viruses continue to be a significant concern for students.

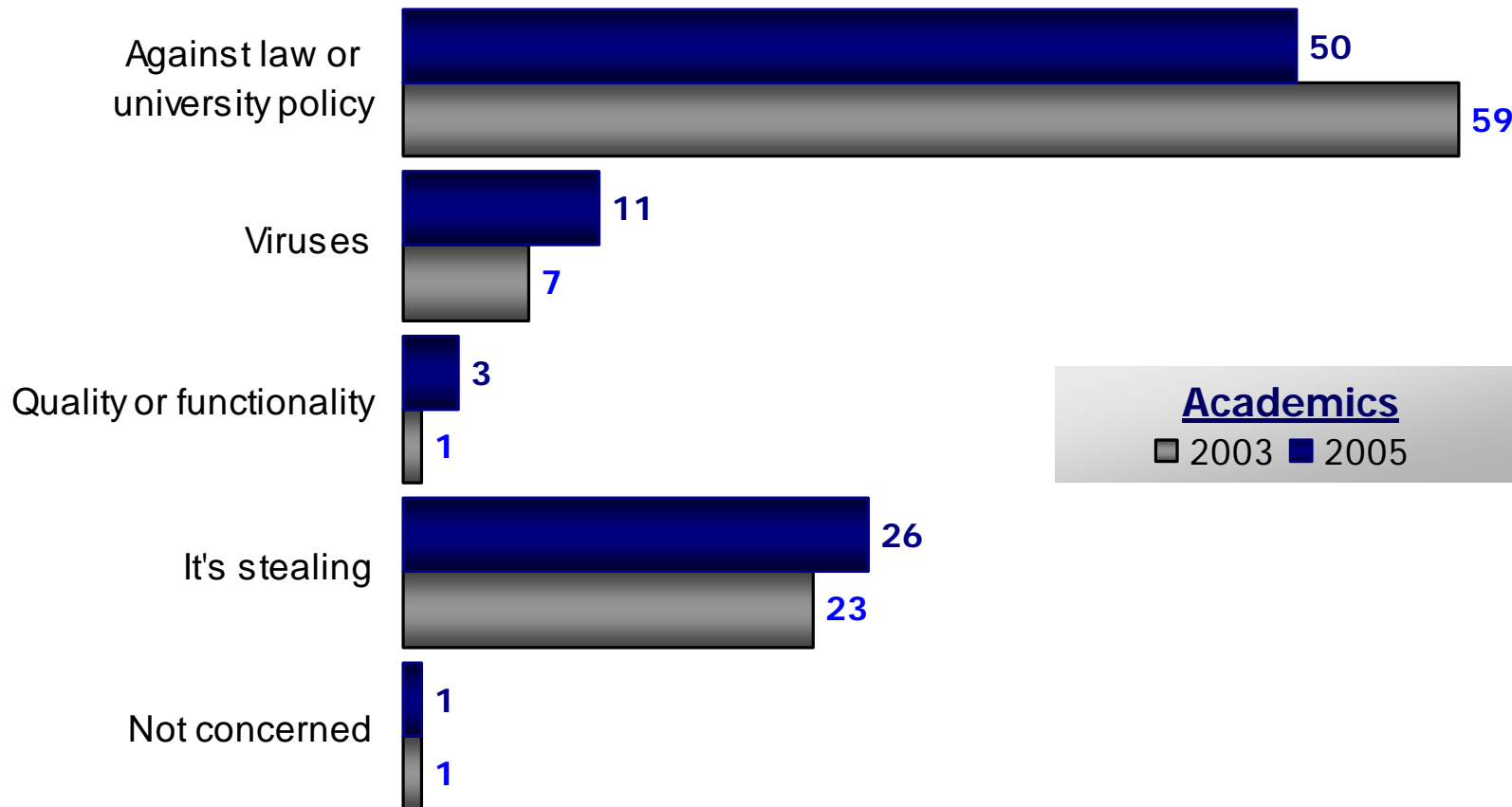


Q. Which one of the following would be your largest concern, if any, about using unlicensed or illegal software?



Concerns with Unlicensed Software

Professors and administrators continue to be concerned primarily with violations of the law and university policy. Students have shifted somewhat – concern with the law and university policy is now their top concern, although viruses continue to be a significant concern for students.



Q. Which one of the following would be your largest concern, if any, about using unlicensed or illegal software?

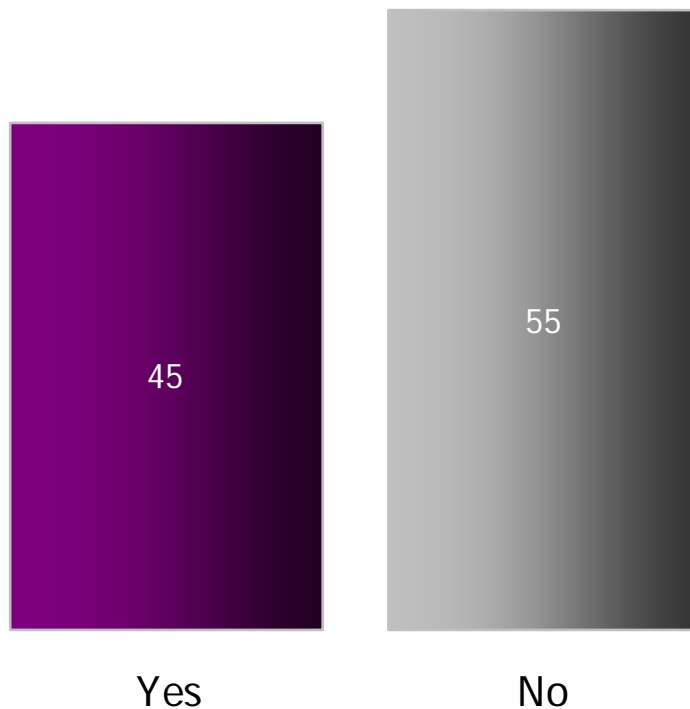


Internet Usage

While home or dormitory continues to be the top location where students access the internet, more students are reporting they go online most often while at school. For professors and administrators, fewer are going online at home – accessing the internet at work has increased 14 points since 2003. A majority of students report that their internet access is not provided by their college or university.

	<u>Students</u>	<u>Academics</u>
<u>Home or dorm</u>		
2005	78	14
2003	83	26
<u>School</u>		
2005	18	NA
2003	10	NA
<u>Work</u>		
2005	3	86
2003	6	72
<u>Public access location</u>		
2005	1	-
2003	1	2

Students



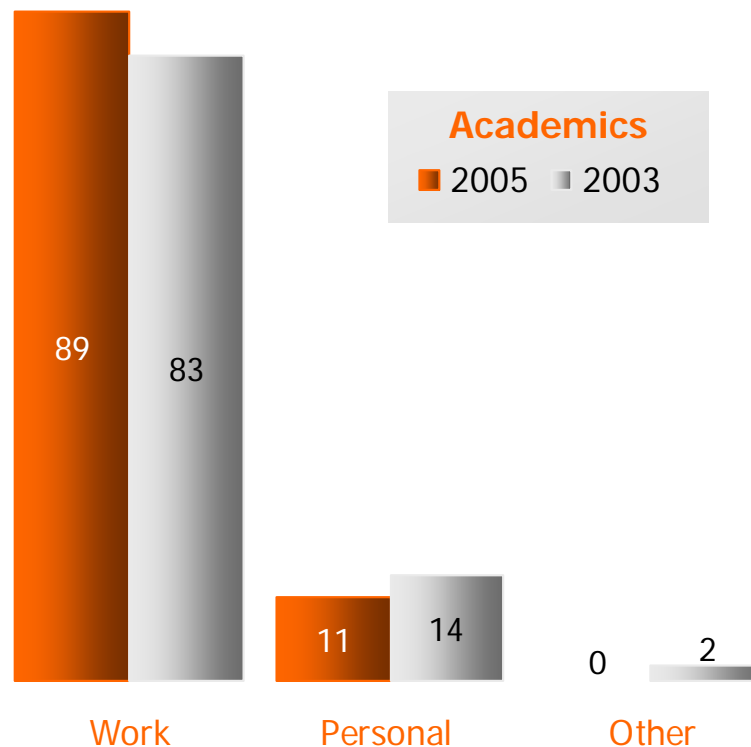
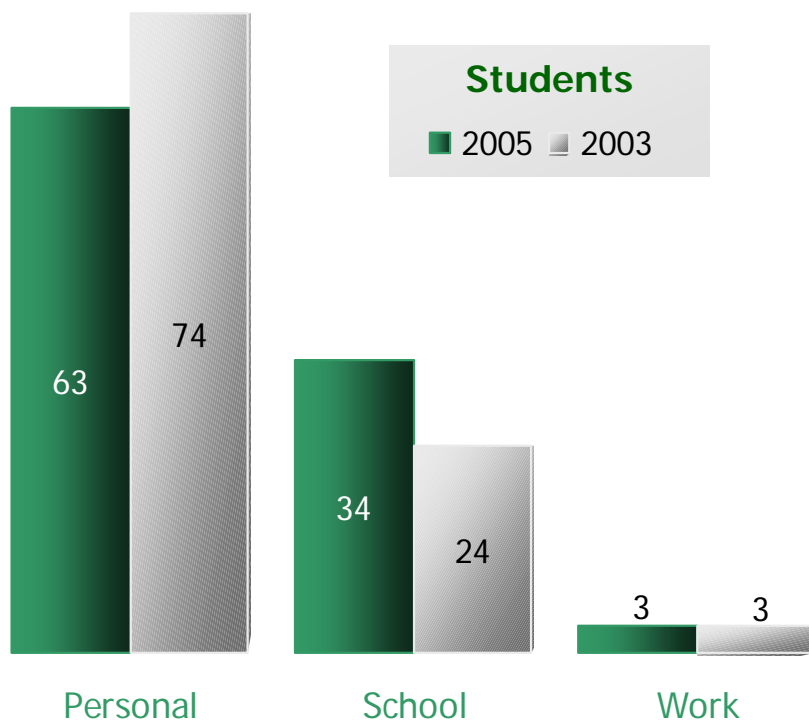
Q. At what location do you access the Internet most often?

Q. Is the internet access at this location provided by your college or university?



Purpose of Internet Use

The internet continues to be utilized mostly for personal uses among students and for work among faculty and administrators – but more than one-third of students now use the internet for school (up from one-quarter in 2003). Students who are not aware of P2P file sharing programs (45%) are more likely to say they use the internet for school. Nearly three-quarters (72%) of students who have no problem with file swapping use the internet for personal purposes.

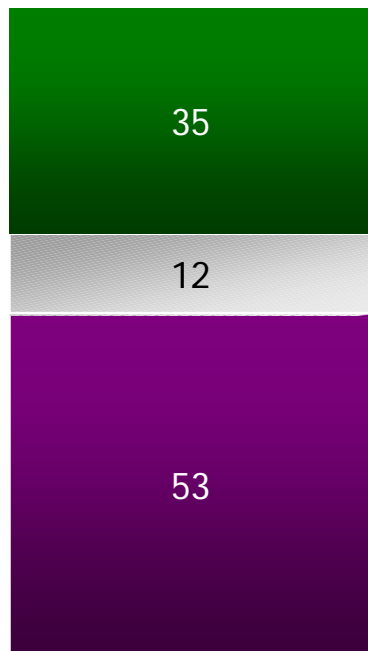


Q. For what purpose do you use the Internet most often?



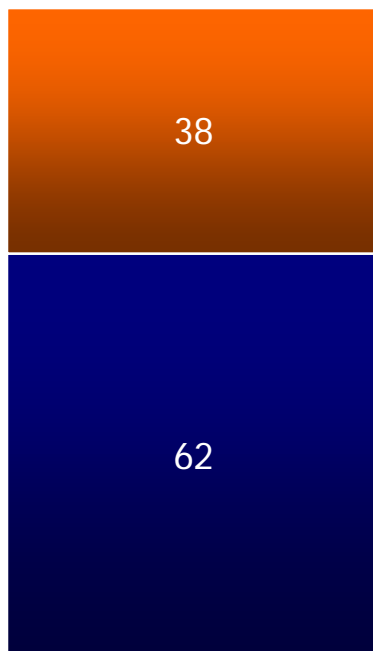
News Awareness

Academics are much more aware of news about unlicensed software – especially regarding news about music and motion picture industry actions against people who have downloaded files.



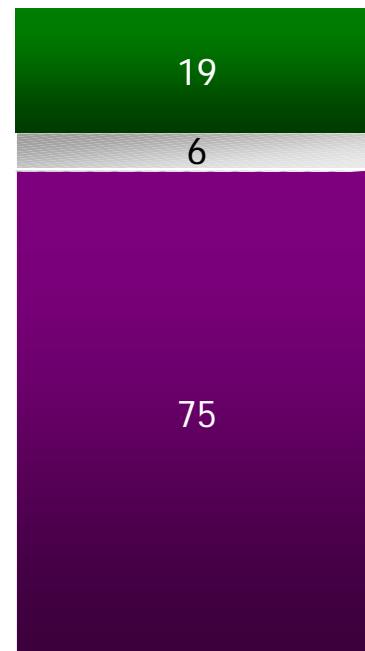
Students

■ Yes ■ Not sure ■ No



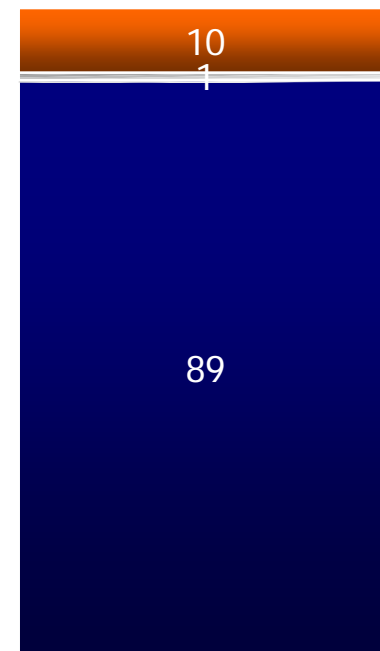
Academics

■ Yes ■ No



Students

■ Yes ■ Not sure ■ No



Academics

■ Yes ■ Not sure ■ No

Q. In the past year, have you heard any news about the use of unlicensed or pirated software?

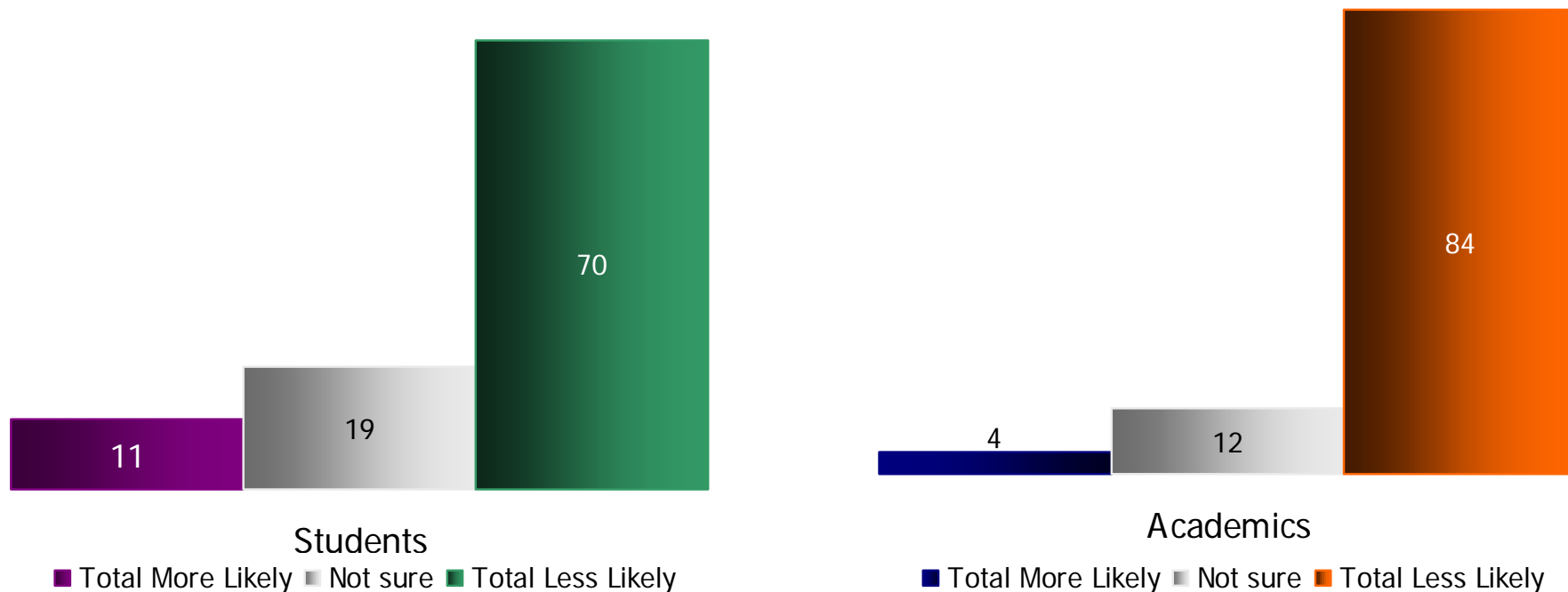
Q. In the past year, have you heard any news about music or motion picture industry actions against people who have downloaded or shared movie or music files?



Likelihood of Behavior Change Based on News

Strong majorities of students and academics who have heard news about unlicensed software or industry actions against downloaders say students are less likely to download unlicensed software, although a moderate disconnect exists between students and academics over the extent of the effect.

To a large extent, however, the student subgroups most affected by this news are those students who are not likely to download in the first place – those who say they would never P2P music or movies (79% less likely), those who say they would never P2P software (77% less likely), and those who feel swapping files is not OK (83% less likely).

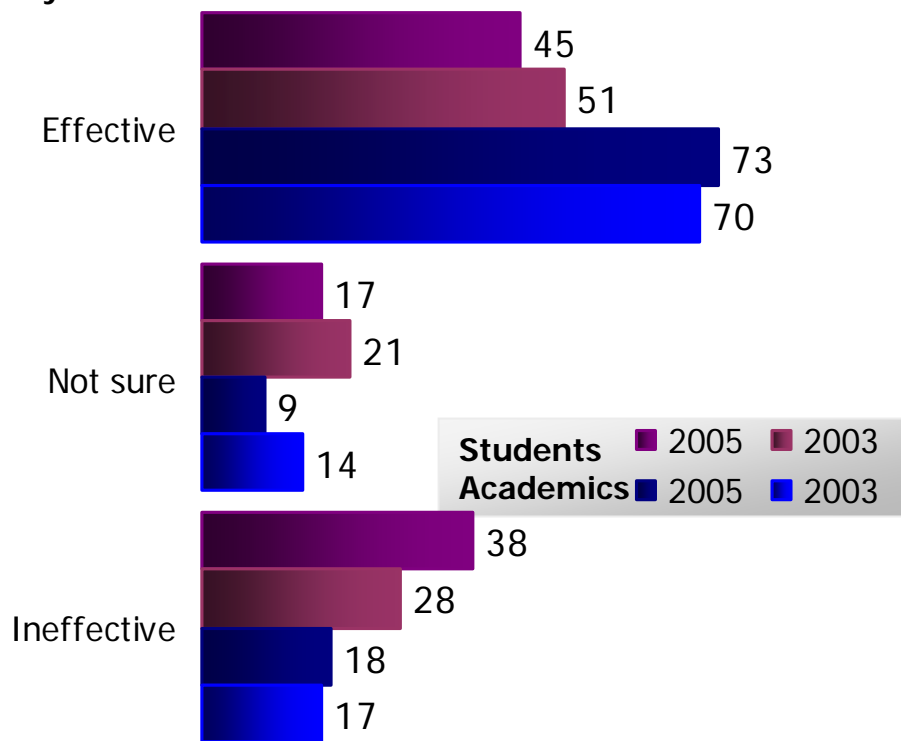
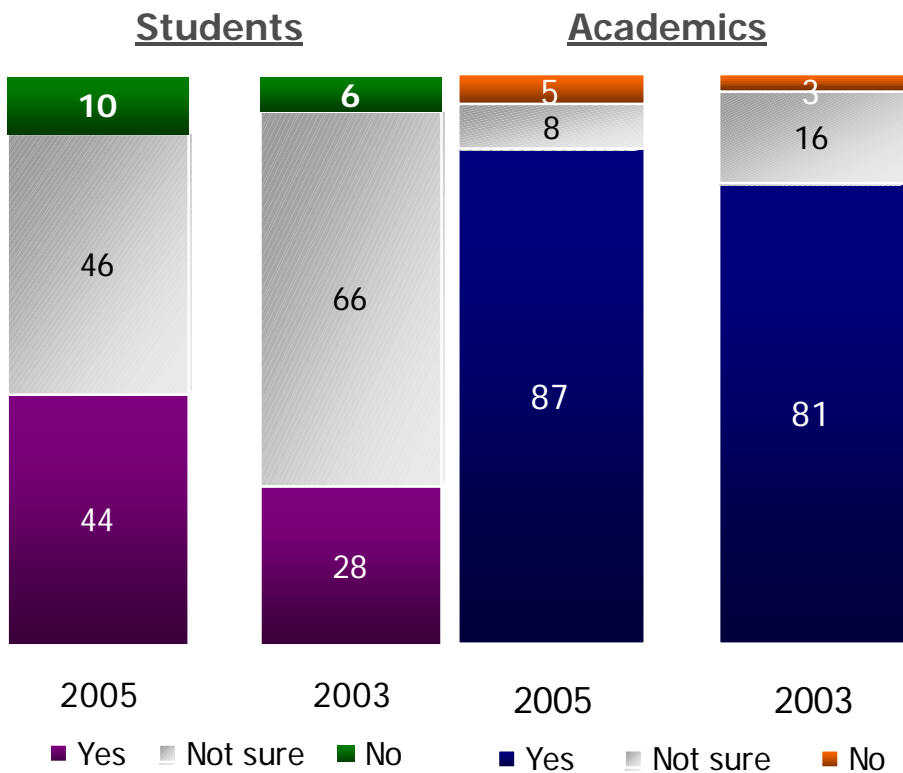


Q. Please indicate whether what you've heard in the past year, such as the recording industry's lawsuits, has made (you/students) more or less likely to download unlicensed or pirated software?



University Policies – A Disconnect

Students are becoming more aware of campus policies regarding downloading, although still less than half say their college or university has such a policy. Perceptions of these policies effectiveness has dropped since 2003 – the net effectiveness (total effective minus total ineffective) has dropped from +23 to +7. Students who mostly use the internet for personal purposes (43%) to report their campus policies are ineffective. Professors and administrators are much more aware of these policies and are much more likely to deem them effective.



Q. Does your college or university have a policy regarding the use of downloading and copying copyrighted works? How effective is this policy?

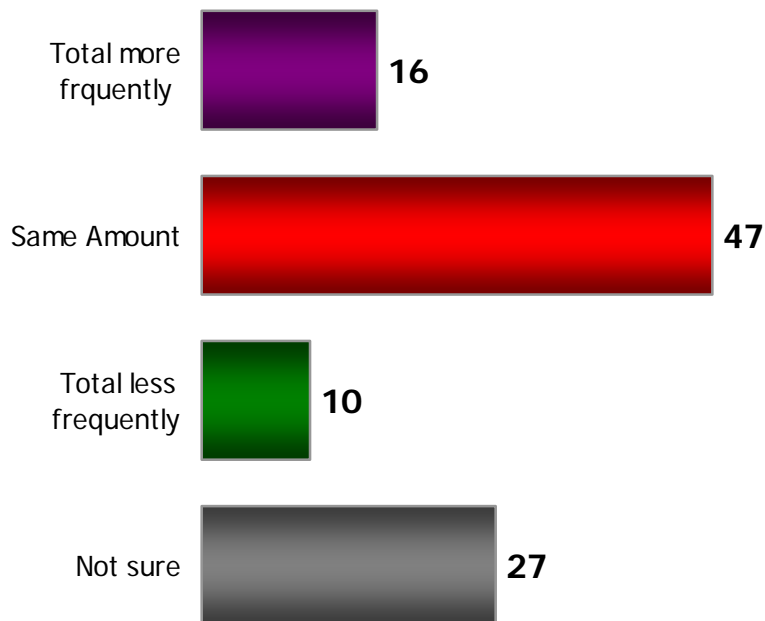


Amount of Time Talking About Downloading Policies

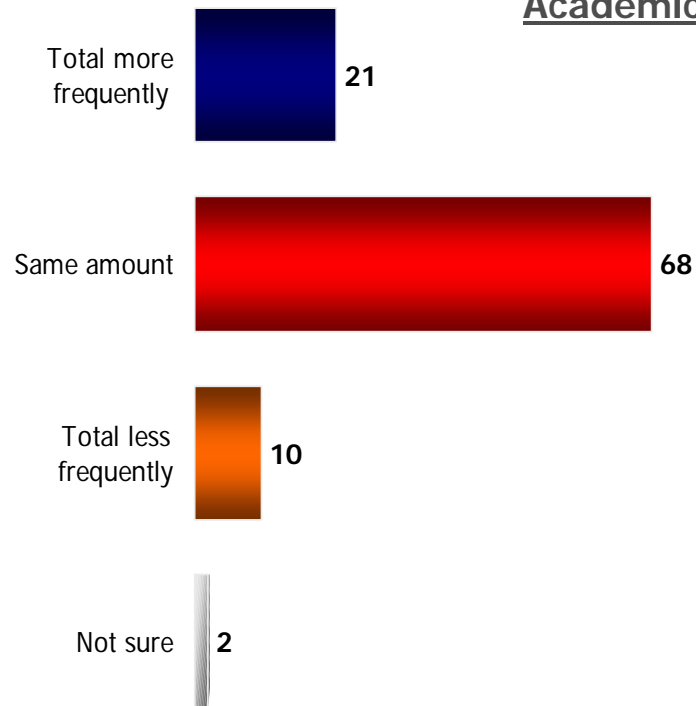
In general, few professors and administrators say they are speaking more frequently to students about the use of unlicensed software – students tend to agree.

Students who say their campus has a policy on downloading unlicensed software (25%) are more likely to say that professors and administrators are talking about this issue more frequently. Students that use P2P for software downloads (17%) and that would always P2P software to save money (19%) are more likely to report that professors and administrators are speaking about this issue less frequently.

Students



Academics



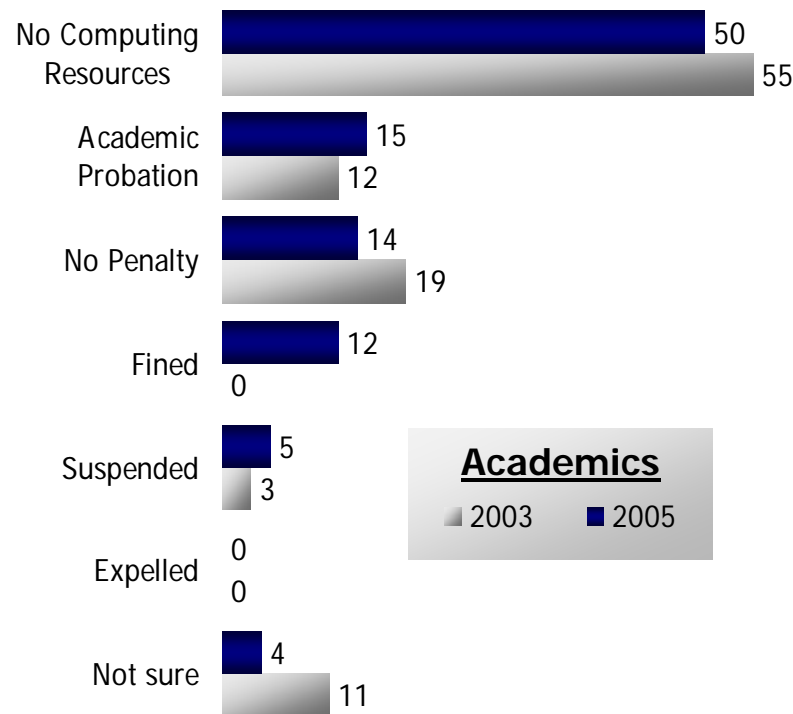
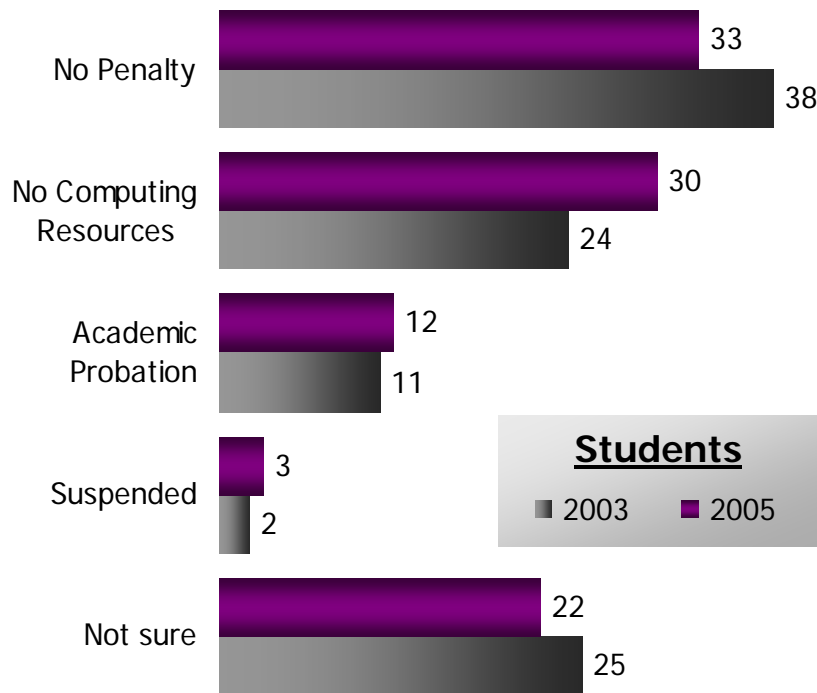
Q. Compared to one year ago, how much more do (professors and administrators/you) talk about policies related to downloading and the use of unlicensed commercial software?



Appropriate Penalties

While a slightly greater number of students do not feel they should be punished for using unlicensed software, nearly as many feel that computing resources should be withheld from students that use pirated commercial software.

Professors and administrators generally agree that revoking university computing resources privileges is an appropriate penalty, and have marginally increased with regard to putting students on academic probation for using copies of unlicensed or pirated software.



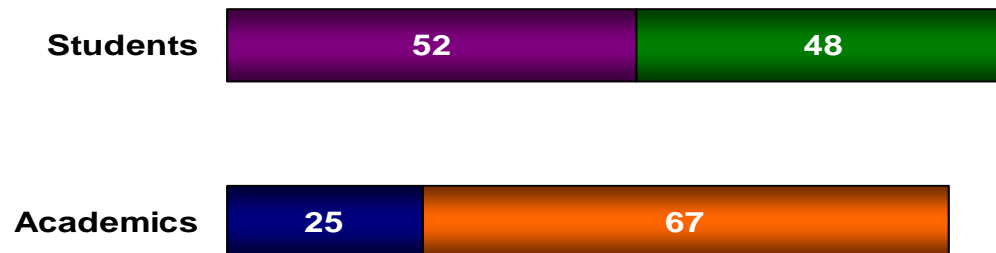
Q. Which of the following penalties is most appropriate for a college or university to impose on students that use copies of unlicensed or pirated software?



Perceptions of Unlicensed Software Use After College

Students are significantly more predisposed to continuing download behavior as they move into the workplace. Half of students feel it's OK to download and swap files in the workplace, twice as many as academics who feel this way. One quarter of students feel it's OK to continue downloading behavior after graduating – academics are unanimously opposed to this behavior outside the college environment. Students that use the university network (29%) and those that mostly connect for personal purposes (29%) are more likely to feel it's OK to continue swapping files after they graduate.

College students aren't the only ones who think it's OK to download and swap software. Even in the workplace, it's OK to download and swap files no matter the value.



It's OK for (me/people) to continue to download or swap software files no matter the value after (I/they) graduate from college.

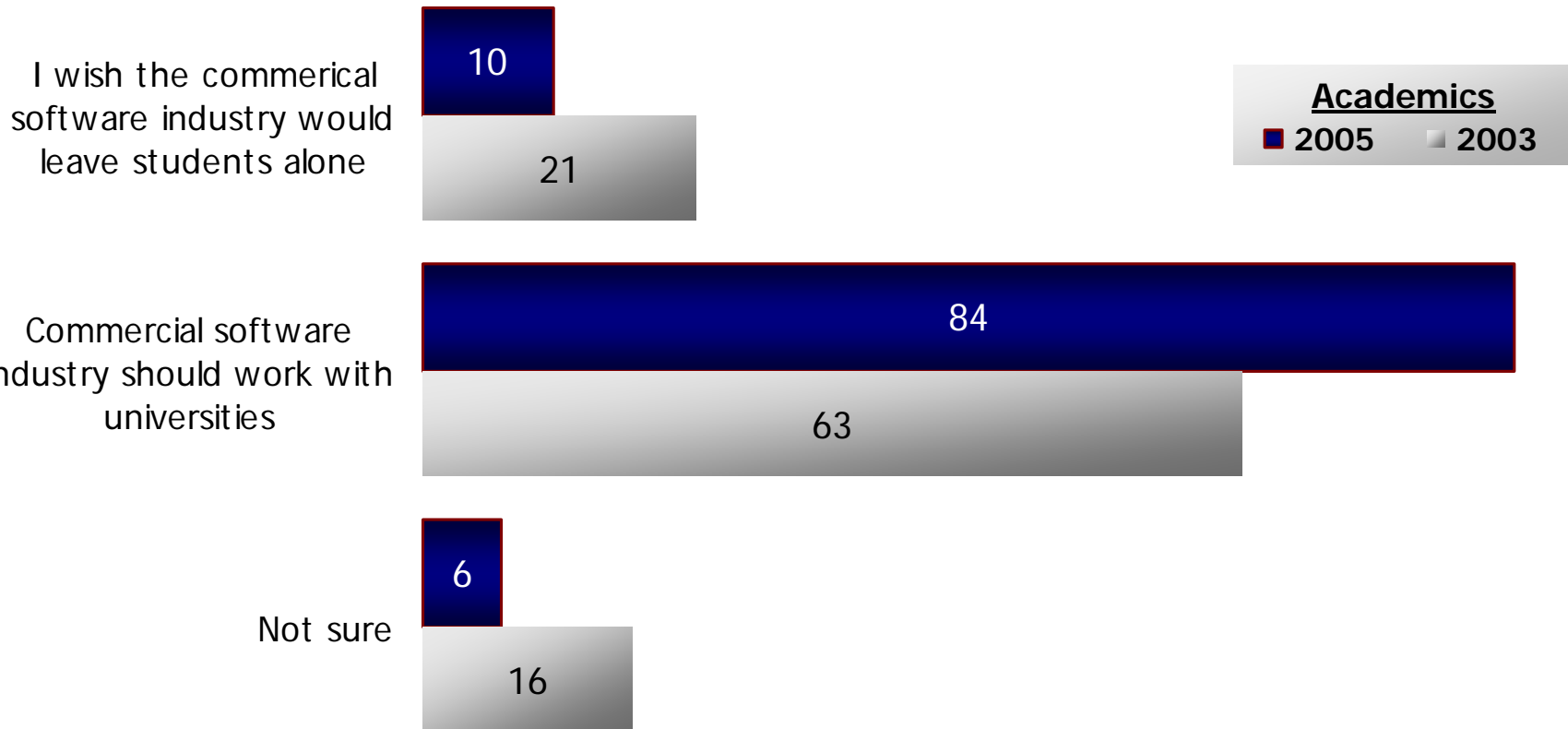


Q. For each of the following statements, indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.



Educator Attitudes Toward Enforcement

Professors and administrators strongly support anti-piracy action by the commercial software industry and these feelings have intensified since 2003 – more than eight-in-ten (84%) now feel the software industry should work with universities to ensure students obtain software legally.



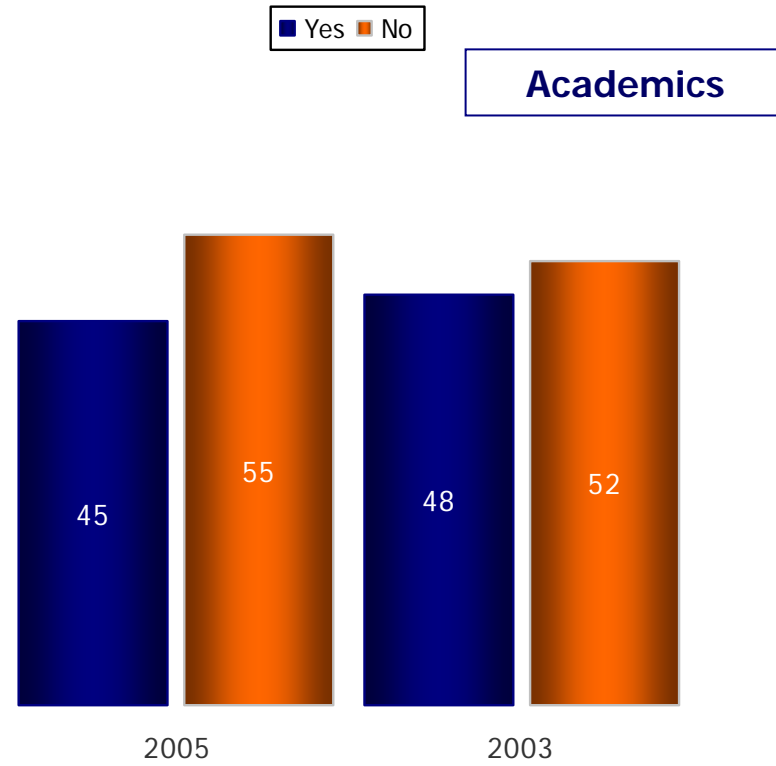
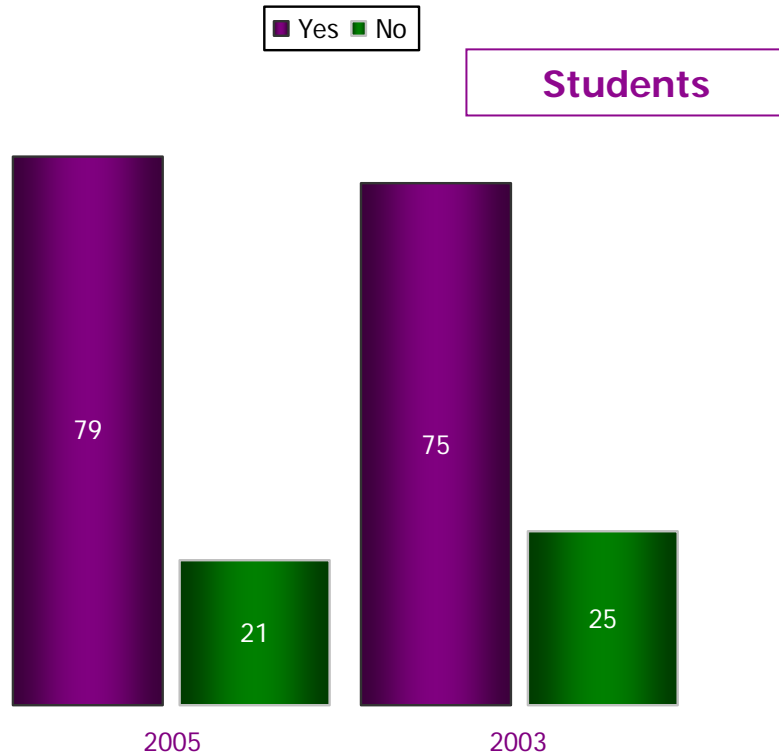
Q. Which one of the following best describes your position about downloading or swapping files without paying for them?



P2P Awareness

P2P awareness among students remains strong and steady – among academics, fewer than half are familiar with P2P.

Academics who have not heard any news about the use of unlicensed or pirated software are much less aware of P2P file sharing programs (29% heard of P2P).

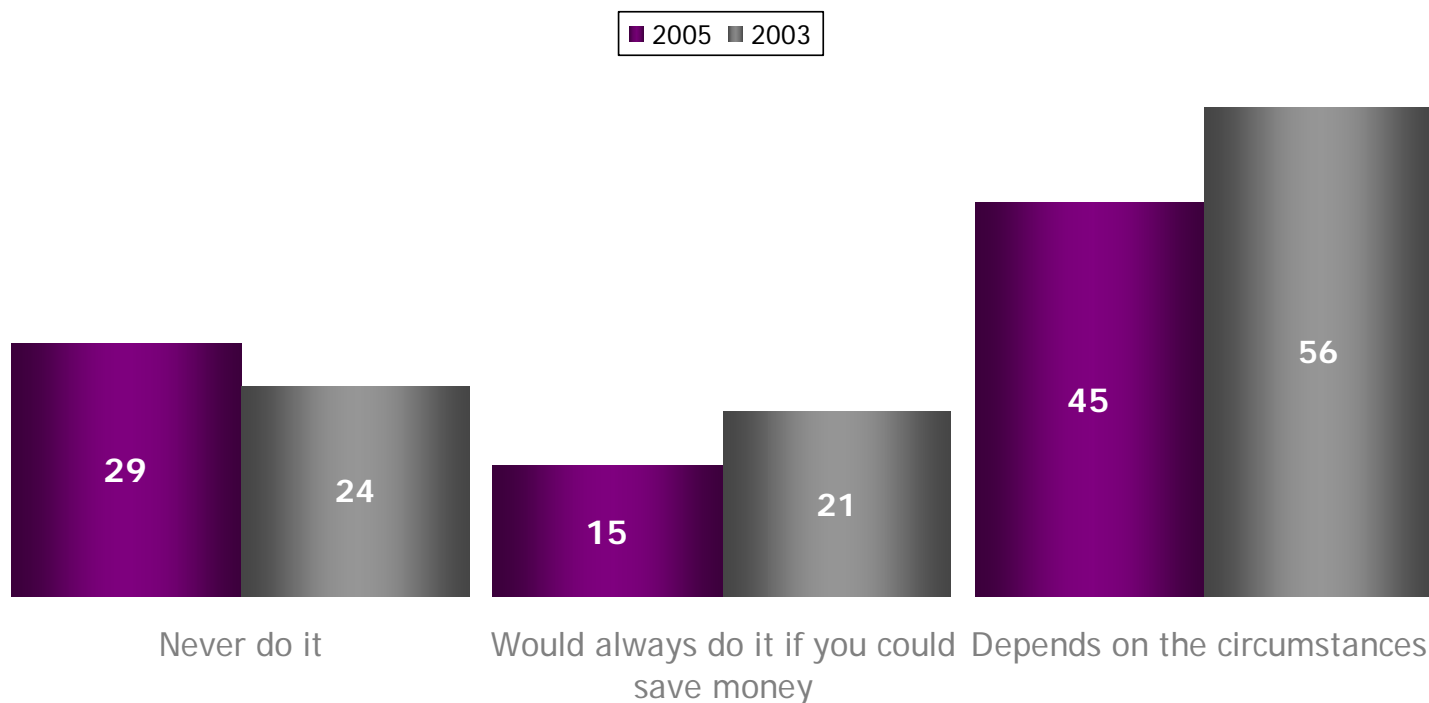


Q. Have you ever heard of peer-to-peer (P2P) file sharing programs, such as Kazaa or Morpheus, which allow users to swap files or to search for and download free files?



Student Ethical Attitudes Toward Music/Movie Piracy

Students are showing signs of change with regard to the likelihood of downloading music or movies – the number of students who would never download to save money (29%) have increased significantly since 2003. Those who regularly P2P software (38%), have no problem with swapping files (39%) and whose campus does not have a downloading policy (25%) are more likely to always download music or movies to save money.



Q. Generally speaking, how likely are you to download music or a movie from a peer-to-peer file sharing program in order to save money even if you know you might be getting an unlicensed or pirated version?



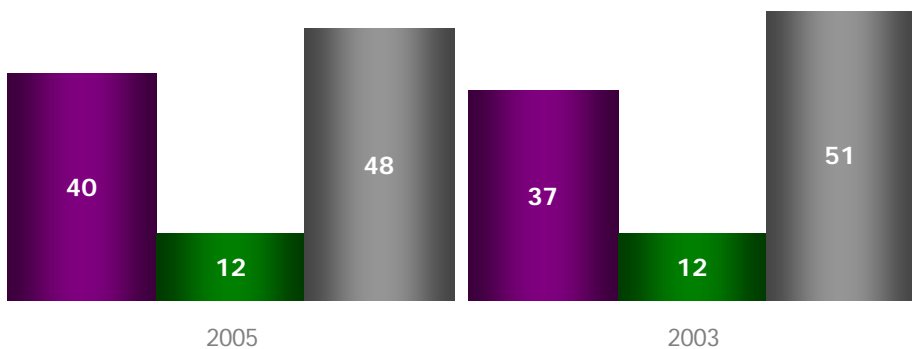
Ethical Attitudes Toward Software Piracy

Academics continue to be solidly opposed to downloading commercial software to save money, although younger faculty (under age 35 – 42% depends) and those who feel the software industry is making unlicensed software an issue to make more money (40% depends) are more ambivalent.

Only a small percentage of students say they would always P2P software to save money, but are split between never downloading and depending on circumstance (40% never, 48% depends). Students who do not study a computer-related subject (42%) are more likely to say they would never P2P software to save money, as are those who feel swapping files is not OK (67% never).

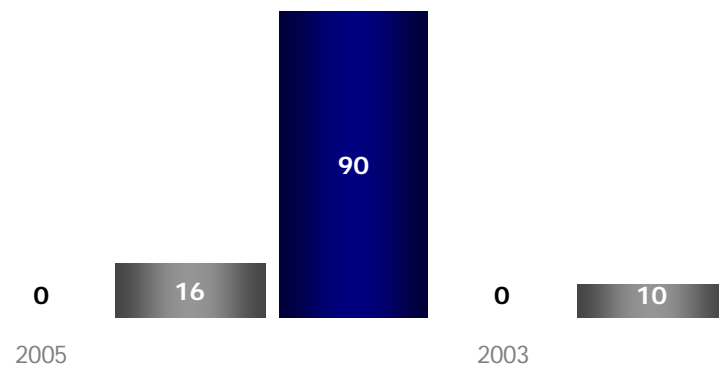
Students

■ Never ■ Always ■ Depends



Academics

■ Never ■ Always ■ Depends



Q . Generally speaking, how likely are you to download a commercial software program from a peer-to-peer file sharing program in order to save money even if you know you might be getting an unlicensed or pirated version of the software program?

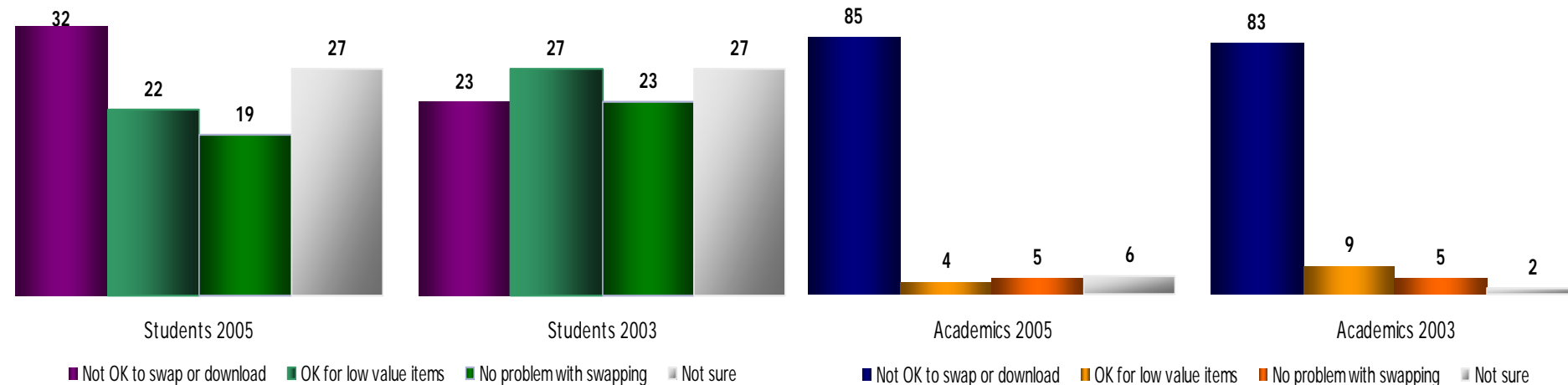


Position on Swapping Files

Academics continue to strongly oppose downloading – more than eight-in-ten (85%) report it is not OK to swap or download files without paying.

Students are more varied in their opinions – one quarter are unsure of their position, but the percentage of students who have no problem with swapping and who think it is OK for low value items have decreased since 2003.

Additionally, one-third (32%) of students report it is not OK to swap or download without paying (up from one quarter in 2003). Those most opposed to file swapping include students who report they would never download music or movies (72%), and those who would never P2P commercial software (54%).



Q. Which one of the following best describes your position about downloading or swapping files without paying for them?



Acceptability of Encouraging Behaviors

Academics

	<u>Not Acceptable</u> 1-3	<u>4-7</u>	<u>Acceptable</u> 8-10	<u>Not Sure</u>
Photocopy and distribute required class reading, such as books and articles				
5/05	63	22	10	5
6/03	63	21	14	4
Purchase one commercial software package that will be installed on multiple students' computer				
5/05	83	9	6	2
6/03	81	10	4	5
Download free versions of commercial software using a peer-to-peer file sharing program				
5/05	78	10	8	4
6/03	74	13	7	6

Very few academics feel it is acceptable to encourage questionable student behaviors. Solid majorities oppose encouraging photocopying required class reading, installing software on multiple computers or downloading free versions of commercial software.

Q. For each of the following, on a scale from one to ten, where a "1" means it is not at all acceptable and a "10" means that it is completely acceptable, how acceptable is it for professors to encourage students to:



Discouragement of Behavior

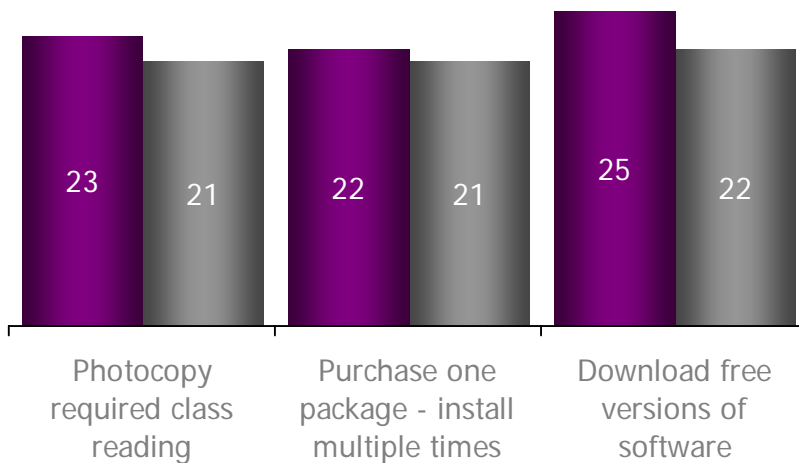
There continues to be a disconnect between students and academics on how often professors discourage behaviors. However, the gap is narrowing – regarding downloading free versions of commercial software using P2P, the 10-point gap in 2003 has narrowed to a 4-point gap. Students who are opposed to swapping files are much more likely to say that professors discourage downloading free commercial software (32%) and installing software on multiple computers (31%).

■ 2003 ■ 2005

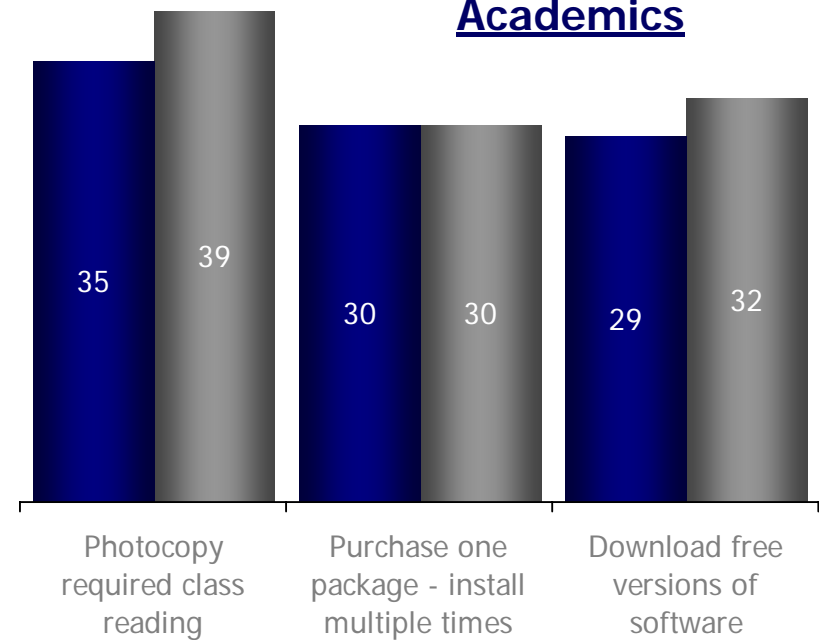
* Charts display % very or fairly often

■ 2003 ■ 2005

Students



Academics

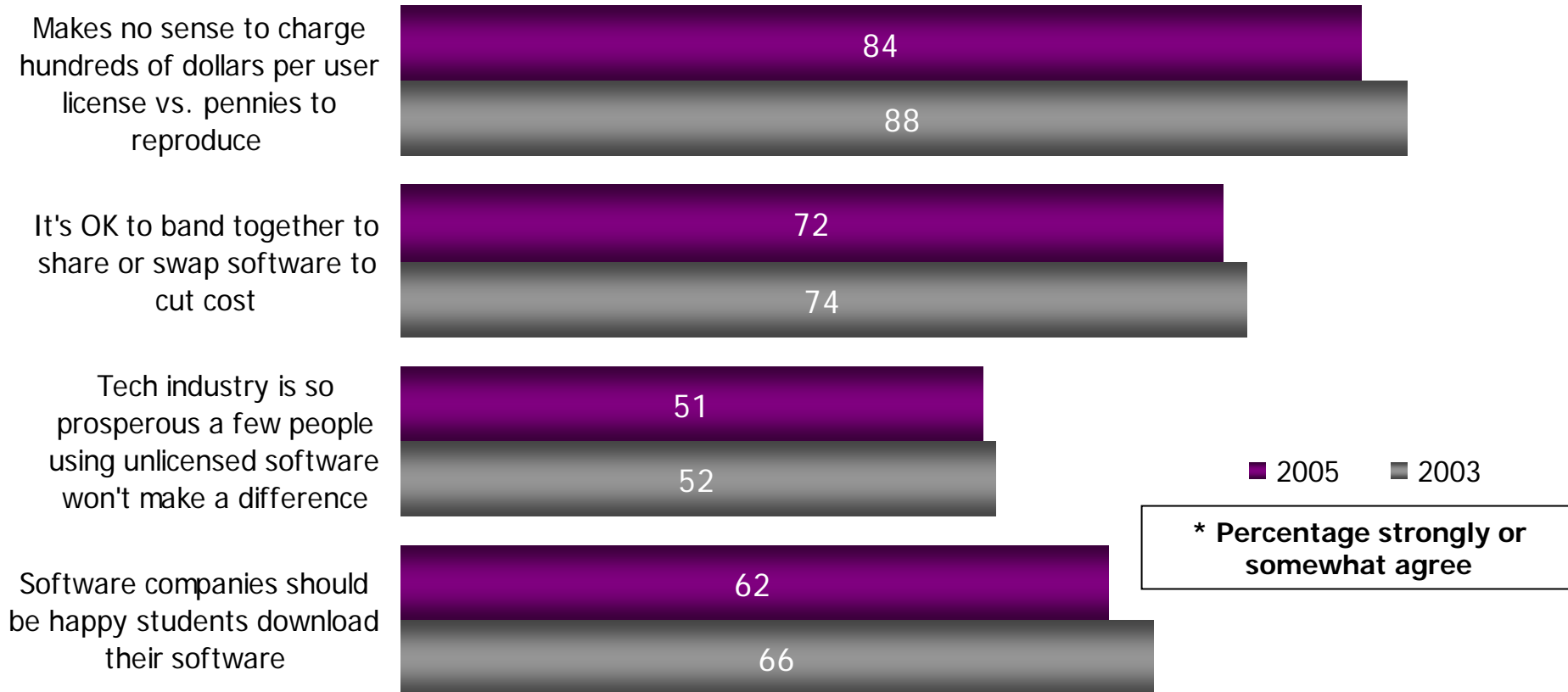


Q. Please indicate how often professors discourage students to...[READ LIST] – very often, fairly often, only occasionally, or never?



Justifying Behaviors - Students

Students strongly agree with many justifications for pirating software. While educators are less likely than students to agree with these justifications, they are more liberal when cost issues are brought to the forefront.

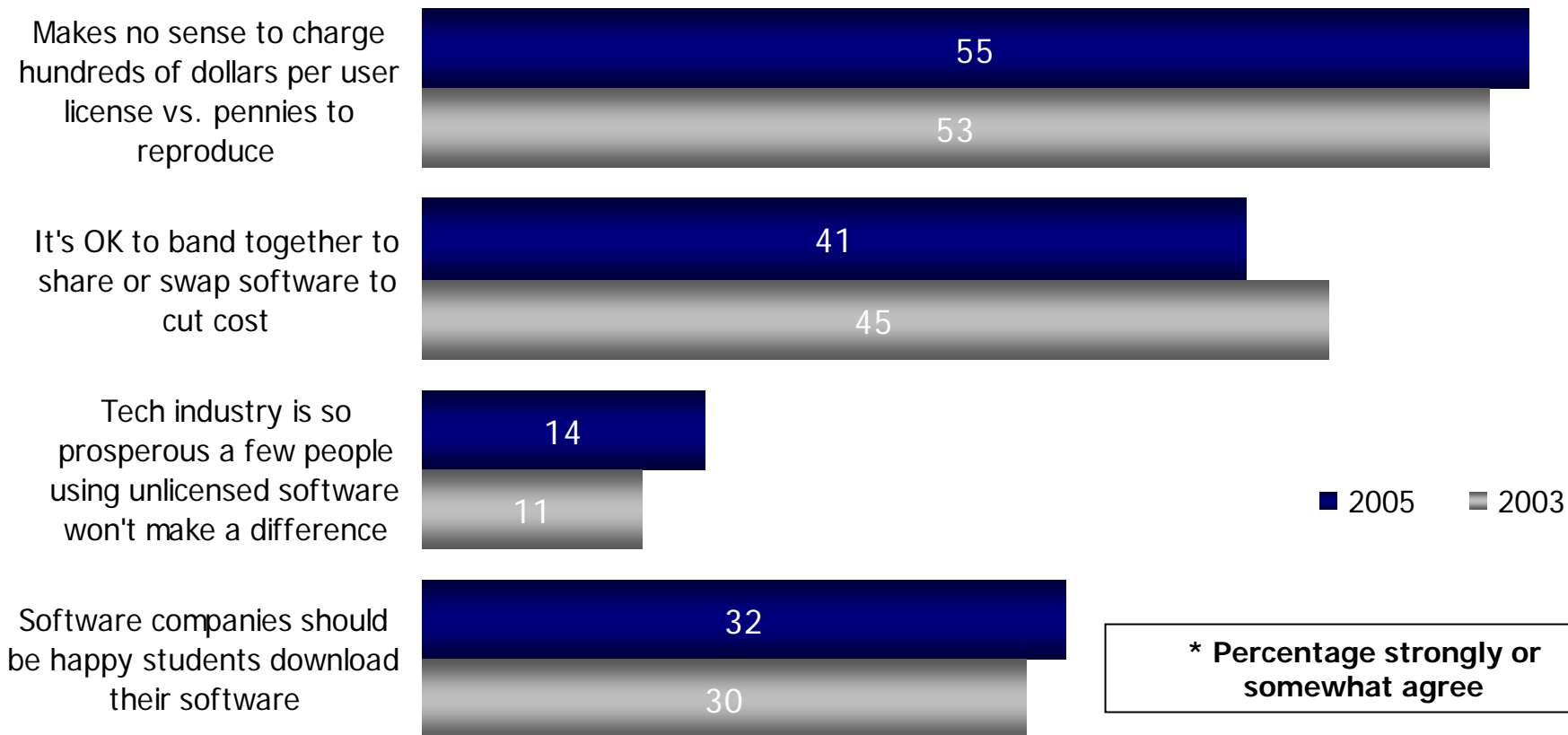


Q. For each of the following statements, indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.



Justifying Behaviors – Professors and Administrators

Students strongly agree with many justifications for pirating software. While educators are less likely than students to agree with these justifications, they are more liberal when cost issues are brought to the forefront.



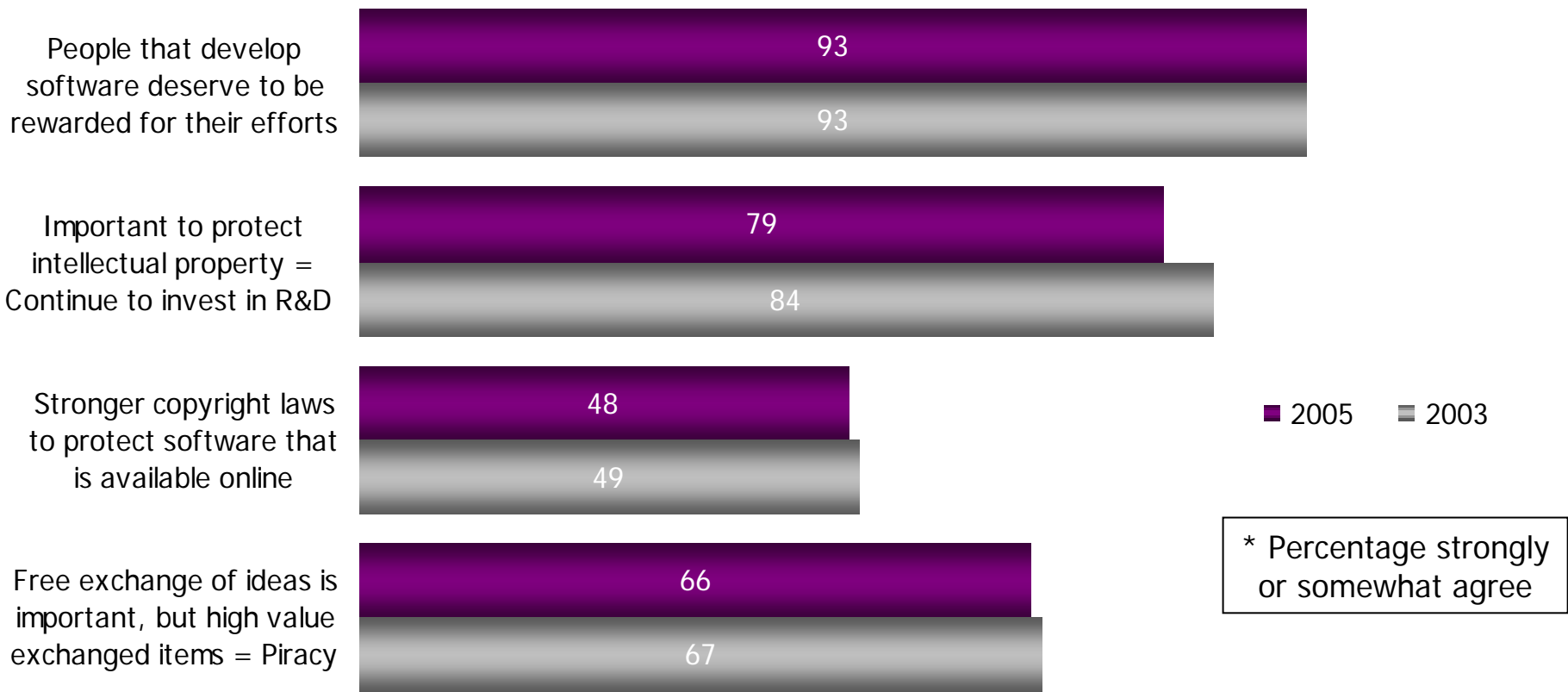
Q. For each of the following statements, indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.



Attitudes Toward Intellectual Property Protection - Students

Despite their behavior, a majority of students endorse the intellectual property values of rewarding software developers and protecting intellectual property rights in order to encourage research and development.

Students who say they would always download software using P2P to save money are less likely to agree with intellectual property protection statements.

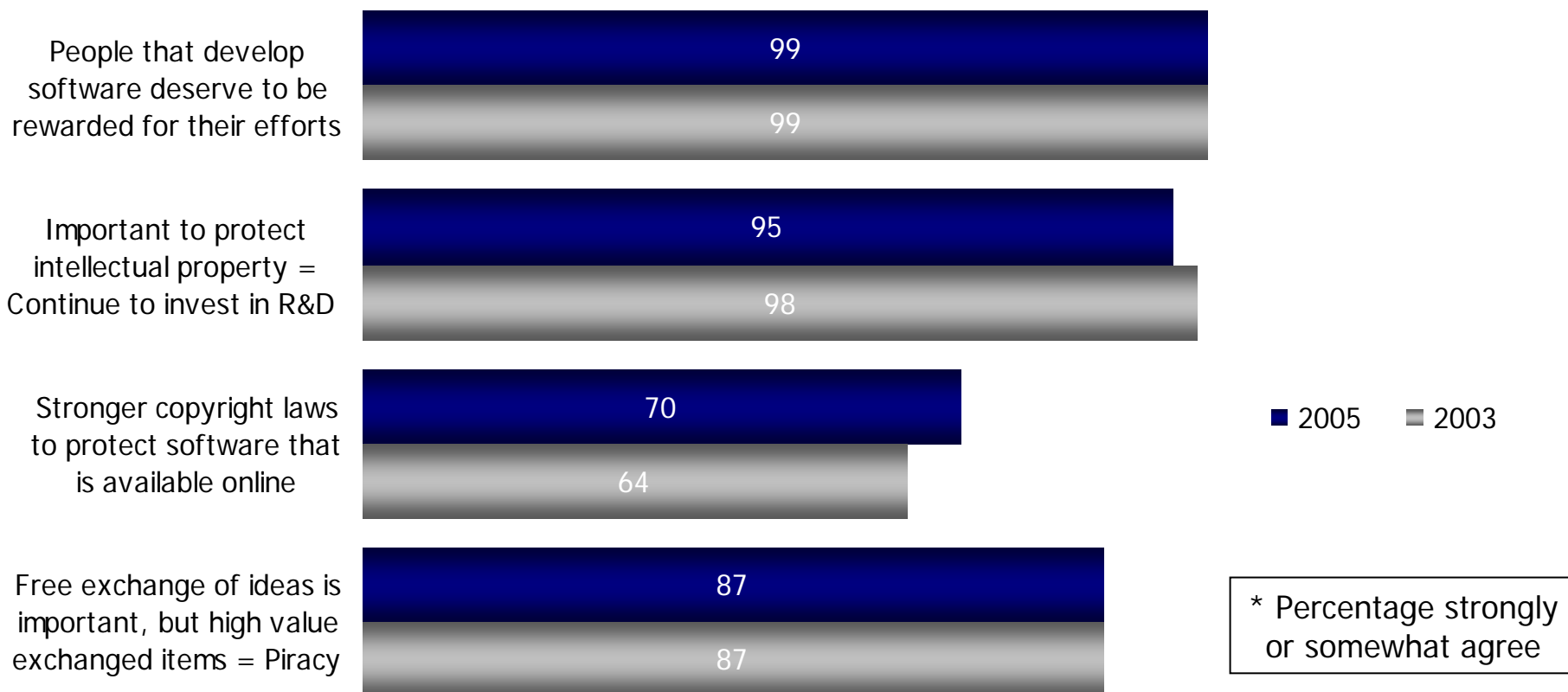


Q. For each of the following statements, indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.



Attitudes Toward Intellectual Property Protection – Professors and Administrators

Professors and administrators strongly support intellectual property protections.

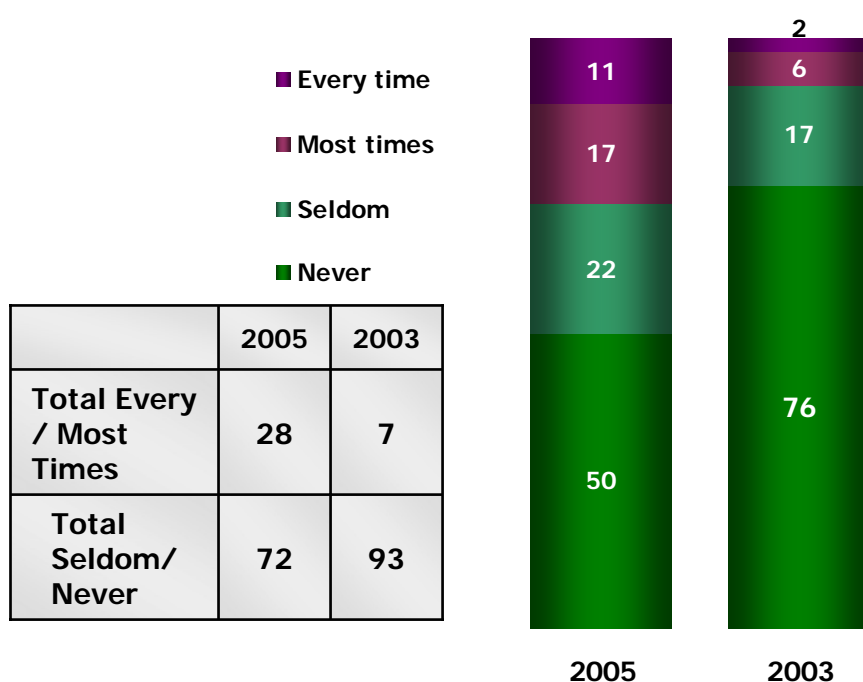


Q. For each of the following statements, indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.



Music Downloading Behavior Among Students

A majority of students continue to engage in music piracy, with seven-in-ten students reporting they have downloaded music either from the internet or from a P2P file sharing program. However, students now pay for their music more frequently than in 2003. While nearly nine-in-ten say they haven't always paid for it, more than one-quarter of students (28%) report they now pay for their music at least most times, four times as many as in 2003. Only half of students report they never pay for their music downloads, down 26 points since 2003.



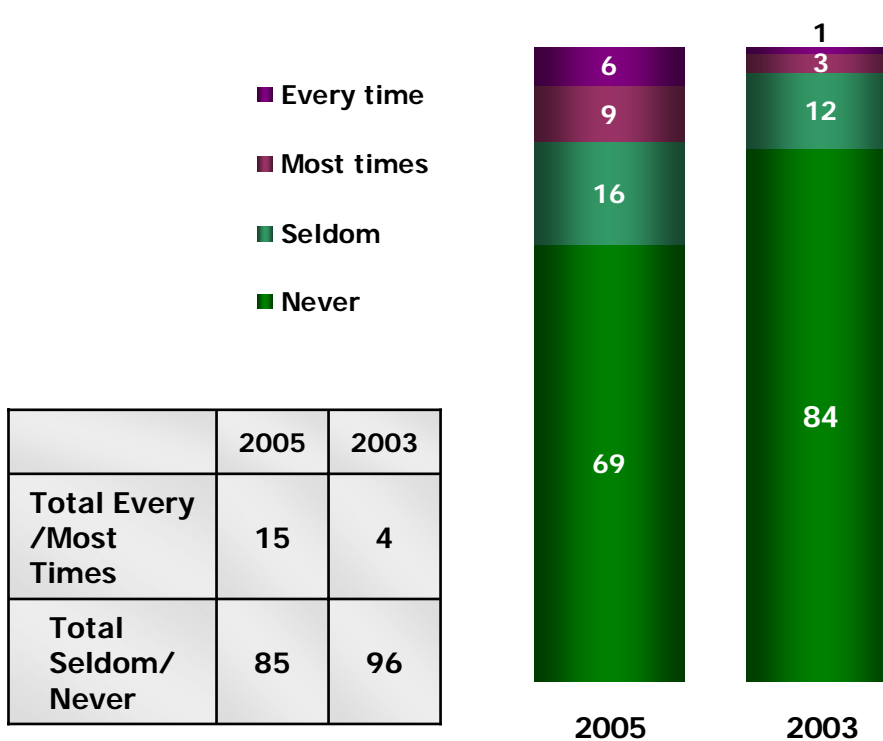
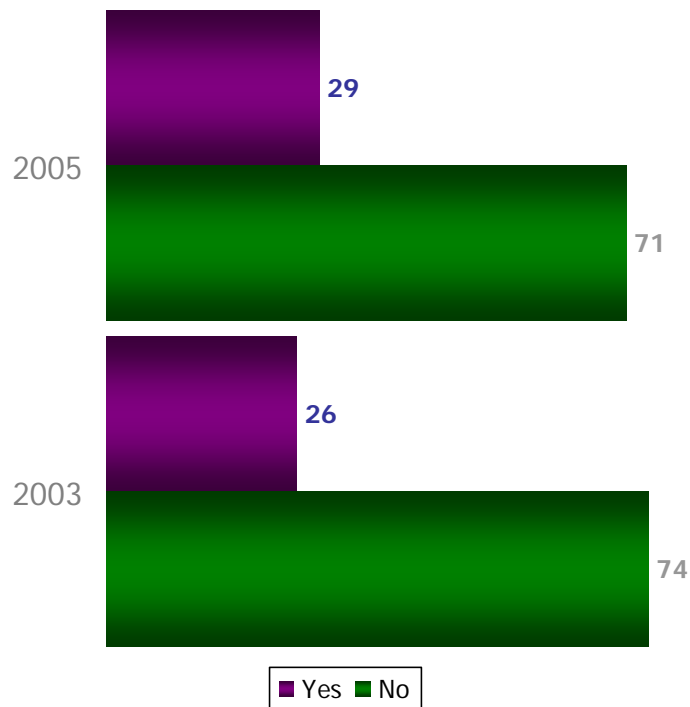
Q. Have you ever downloaded music from the Internet or a peer-to-peer file sharing program, whether you had to pay for it or not?

Q. How often do you pay for the music that you download? *Asked only of those who say that they have downloaded music from the internet or a P2P file sharing program.*



Movie Downloading Behavior Among Students

Movie downloading continues to be significantly less prevalent than music downloading. Among movie downloaders, the majority still report they never pay (69%), but signs of improvement are present – the percentage of students who pay for movie downloads at least most times has increased by 11 points since 2003. Students who study a computer-related subject (39%) and who have no problem with swapping files (55%) are more likely to report downloading movies.



Q. Have you ever downloaded movies from the Internet or a peer-to-peer file sharing program, whether you had to pay for it or not?

Q. How often do you pay for the movies that you download? *Asked only of those who say that they have downloaded music from the internet or a P2P file sharing program.*