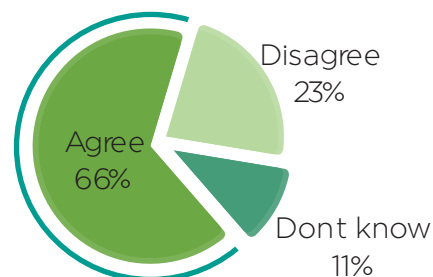


Research into the online behaviour and attitudes of Singaporeans in relation to movie, TV and music piracy 2014



Most Singaporeans know what they are doing is wrong.

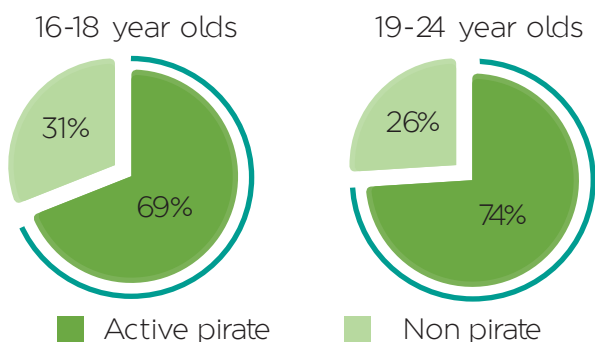
66% of active pirates agree that piracy is stealing/theft.



KEY FINDINGS

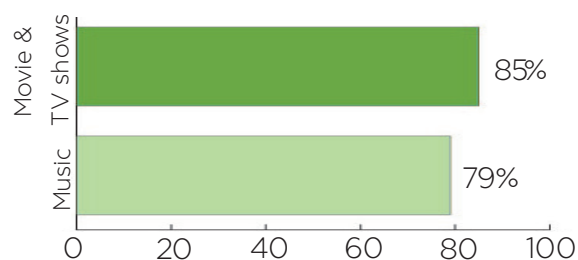
It's a youth issue.

7 out of 10 youth (16-24 year olds) are active pirates.

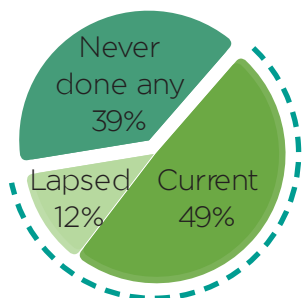


The primary reason Singaporeans pirate is because they can get it for free.

Active pirates' top reason for piracy: Because it's free.

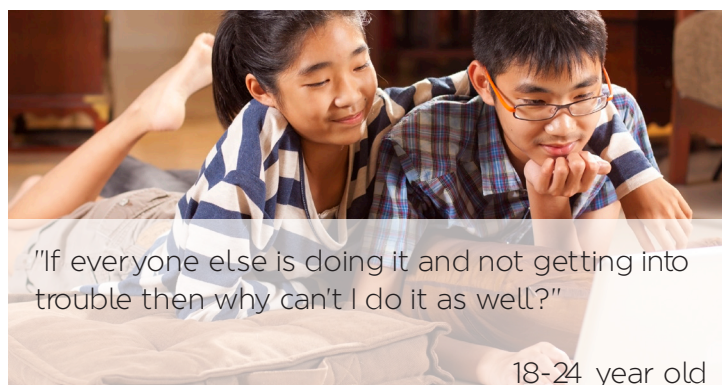


More than half (61%) of the Singaporean adult population (16-64 year olds) say they have participated in movie and TV or music piracy.



61% have participated in movie and TV or music piracy.

"Why don't you go directly to iTunes?"
"Because it's not free."
18-24 year old



17% of Singaporeans say that they download or stream pirated movies, TV shows or music at least once a week.

41% of persistent pirates say that they pirate movies, TV shows and music because there are no enforced laws to stop them.

Exposure to high risk advertising

Piracy websites that target Singaporeans rely on advertising revenues as their means of profit. When asked what type of advertising they recall seeing on piracy websites...

58% of 16-18 year olds recall seeing sex industry advertisements.

46% of 19-24 year olds recall seeing advertisements for gambling sites.

Home is the preferred location for piracy activities

62% of persistent pirates download or stream movies and TV shows at home weekly, while 9% do the same at work.

51% of persistent pirates download or stream music at home weekly, while 16% do the same at work.

WHAT CAN BE DONE?

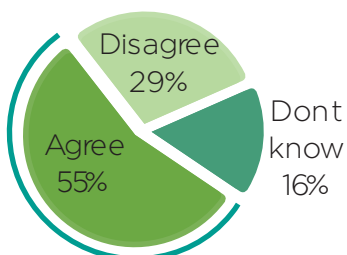
Individuals play the biggest role in preventing online piracy

32% find the biggest responsibility (when asked to choose only one) with themselves in preventing online piracy followed by Internet Service Providers (16%) and the Government (13%).

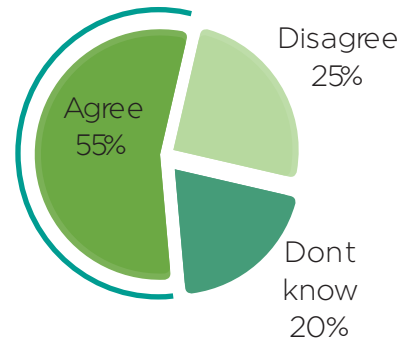
"They are trying to find the big fish. The people who massively upload files."

18-24 year old

55% of Singaporeans believe the Internet requires more regulation to prevent individuals from downloading or streaming pirated content.



55% of Singaporeans say Singapore's courts should be allowed to decide to block overseas websites that profit from pirated content.



"If TPB was blocked, what would your life be like?"

"Miserable!"

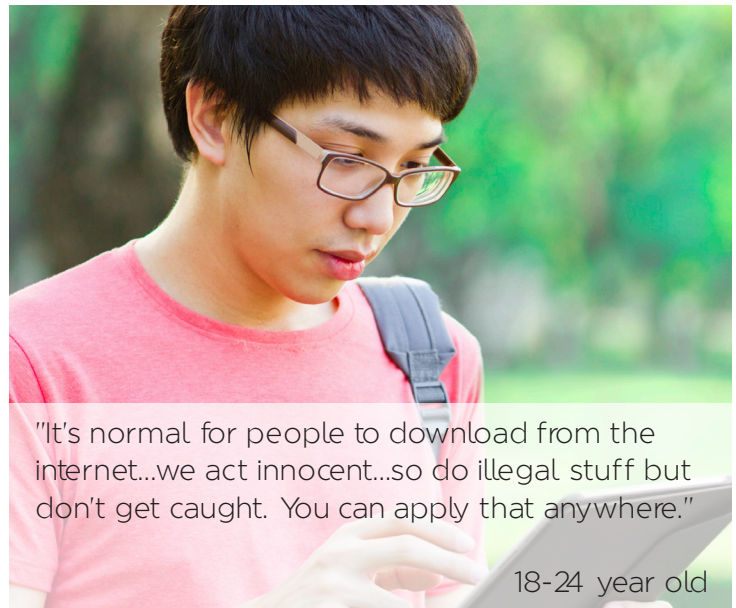
"Where would you go instead?"

"CD shops!"

18-24 year old

"[If my site is blocked] I think I'd just pay... somewhere cheap."

24-35 year old



"It's normal for people to download from the internet...we act innocent...so do illegal stuff but don't get caught. You can apply that anywhere."

18-24 year old

This Research was developed by Sycamore Research and Marketing and Insight Asia Research Group with support from Golden Village, Shaw Theatres and Cathay Cineplexes, creative organizations and associations in Singapore.

Methodology

Qualitative Discussion Groups
(Nov 19-20, 2013)

- * 18-24 year olds pirates including self proclaimed lapsed pirates
- * 25-34 year old pirates including some parents

Online Quantitative Research
(Dec 2-10, 2013)

- * 800 respondents aged 19-64
- * 100 respondents aged 16-18
- * Up-weighted to represent total population

Segment definition

Active pirates	Pirates that currently download or stream illegal content from the internet
Persistent pirates	Pirates that currently download or stream illegal content from the Internet at a frequency of weekly/more often