

Irdeto Market Survey 2014

QuickRead Report, May 2014

1 METHODOLOGY

An online omnibus survey of 1,600 representative adults in Australia, Singapore, India and Indonesia ages 18+

2 SURVEY QUESTIONS

Q1. Where do you watch video content (e.g. TV, movies, sports)? (Choose all that apply)

<i>Response</i>	<i>Australia</i>	<i>Singapore</i>	<i>India</i>	<i>Indonesia</i>
<i>At home</i>	330 (94%)	231 (92%)	452 (90%)	421 (84%)
<i>At work</i>	53 (15%)	45 (18%)	147 (29%)	64 (13%)
<i>At school</i>	19 (5%)	24 (10%)	24 (5%)	25 (5%)
<i>In my free time outside of work or home (eg. cafes, at the gym)</i>	83 (24%)	100 (40%)	214 (43%)	191 (38%)
<i>During my commute (eg. on the bus, train, flights etc.)</i>	77 (22%)	102 (41%)	163 (33%)	68 (14%)
<i>I do not watch video content</i>	0	0	0	0

Q2. On which screens do you watch the most video content (TV, movies, sports)? (Choose one)

<i>Response</i>	<i>Australia</i>	<i>Singapore</i>	<i>India</i>	<i>Indonesia</i>
<i>Laptops/desktop computer</i>	110 (31%)	90 (36%)	179 (36%)	121 (24%)
<i>Smartphones</i>	41 (12%)	53 (21%)	100 (20%)	147 (29%)
<i>Tablet</i>	20 (6%)	35 (14%)	24 (5%)	16 (3%)
<i>TV</i>	179 (51%)	72 (29%)	197 (39%)	216 (43%)

Q3. Which platform do you use the most to access video content (TV, movies, sports)? (Choose one)

<i>Response</i>	<i>Australia</i>	<i>Singapore</i>	<i>India</i>	<i>Indonesia</i>
<i>Free-to-air TV</i>	126 (36%)	26 (10%)	14 (3%)	60 (12%)
<i>Smart or connected TV</i>	19 (5%)	18 (7%)	37 (7%)	31 (6%)
<i>Cable TV</i>	49 (14%)	69 (28%)	162 (32%)	79 (16%)
<i>Satellite TV</i>	21 (6%)	4 (2%)	126 (25%)	44 (9%)
<i>Free online video sites (Youku, Tudou etc.) / Free downloads</i>	96 (27%)	121 (48%)	128 (26%)	243 (49%)
<i>Paid online video sites</i>	8 (2%)	1 (0%)	14 (3%)	12 (2%)

<i>I still rent/buy DVDs from the store</i>	26 (7%)	3 (1%)	9 (2%)	25 (5%)
<i>Other Platforms</i>	5 (1%)	8 (3%)	10 (2%)	6 (1%)

Q4. Which of the following devices do you own or plan to buy within the next year? (Choose all that apply)

<i>Response</i>	<i>Australia</i>	<i>Singapore</i>	<i>India</i>	<i>Indonesia</i>
<i>Satellite set-top box</i>	53 (15%)	31 (12%)	159 (32%)	37 (7%)
<i>Games console (e.g. Xbox, Playstation)</i>	126 (36%)	51 (20%)	104 (21%)	82 (16%)
<i>Dongles that plug into TV (e.g. Google Chromecast)</i>	25 (7%)	22 (9%)	106 (21%)	39 (8%)
<i>Tablet (e.g. iPad, Samsung Galaxy Tab)</i>	161 (46%)	123 (49%)	225 (45%)	228 (46%)
<i>Smartphone (e.g. iPhone, Samsung phone)</i>	233 (67%)	148 (59%)	293 (59%)	326 (65%)
<i>Smart TV</i>	111 (32%)	101 (40%)	201 (40%)	134 (27%)
<i>Other</i>	52 (15%)	22 (9%)	29 (6%)	14 (3%)

Q5. How do you use connected devices (e.g. tablet, smartphone, laptop, etc.) while watching TV, movie or sports content? (Choose one)

<i>Response</i>	<i>Australia</i>	<i>Singapore</i>	<i>India</i>	<i>Indonesia</i>
<i>I use them to do other things like play games or chat with friends</i>	122 (35%)	82 (33%)	80 (16%)	94 (19%)
<i>I use them to get more information on the programme or download apps related to it</i>	41 (12%)	58 (23%)	130 (26%)	236 (47%)
<i>I use them to interact with or discuss the programme on social media, while I'm watching it</i>	27 (8%)	34 (14%)	133 (27%)	91 (18%)
<i>I use them to watch other content at the same time</i>	60 (17%)	25 (10%)	50 (10%)	31 (6%)
<i>I don't use connected devices while watching TV, movie or sports content</i>	100 (29%)	51 (20%)	107 (21%)	48 (10%)

Q6. How likely are you to watch pirated video content (e.g. TV show, movie or sports)? (Choose one)

<i>Response</i>	<i>Australia</i>	<i>Singapore</i>	<i>India</i>	<i>Indonesia</i>
<i>Extremely Likely</i>	50 (14%)	15 (6%)	77 (15%)	81 (16%)
<i>Likely</i>	75 (21%)	68 (27%)	100 (20%)	246 (49%)
<i>Neutral</i>	85 (24%)	88 (35%)	125 (25%)	127 (25%)
<i>Unlikely</i>	63 (18%)	56 (22%)	133 (27%)	32 (6%)
<i>Extremely Unlikely</i>	77 (22%)	23 (9%)	65 (13%)	14 (3%)

Q7. What is the most compelling reason for you to watch pirated video content? (Choose one)

<i>Response</i>	<i>Australia</i>	<i>Singapore</i>	<i>India</i>	<i>Indonesia</i>
<i>I don't want to wait for the video content to be officially released</i>	45 (13%)	33 (13%)	49 (10%)	65 (13%)
<i>If the video content is not available in my location</i>	92 (26%)	77 (31%)	119 (24%)	117 (23%)
<i>If the video content is too expensive</i>	67 (19%)	75 (30%)	143 (29%)	180 (36%)
<i>If I can't watch the video on my preferred device (e.g. smartphone, tablet)</i>	27 (8%)	22 (9%)	46 (9%)	93 (19%)
<i>I would never watch pirated video content</i>	119 (34%)	43 (17%)	143 (29%)	45 (9%)

Q8. What is the main factor that would prevent you watching pirated video content? (Choose one)

<i>Response</i>	<i>Australia</i>	<i>Singapore</i>	<i>India</i>	<i>Indonesia</i>
<i>I believe in protecting intellectual property (IP)</i>	93 (27%)	35 (14%)	117 (23%)	80 (16%)
<i>Poor quality of pirated videos</i>	60 (17%)	81 (32%)	117 (23%)	170 (34%)
<i>Potential to view uncensored or illicit content</i>	4 (1%)	3 (1%)	32 (6%)	39 (8%)
<i>Government supervision on illegal pirated video transmission</i>	27 (8%)	26 (10%)	59 (12%)	44 (9%)
<i>Security issues e.g virus or spams embedded in pirated videos</i>	67 (19%)	62 (25%)	122 (24%)	118 (24%)
<i>Fear of legal repercussions</i>	73 (21%)	27 (11%)	43 (9%)	11 (2%)
<i>Nothing would stop me; I don't mind watching pirated video content</i>	26 (7%)	16 (6%)	10 (2%)	38 (8%)