

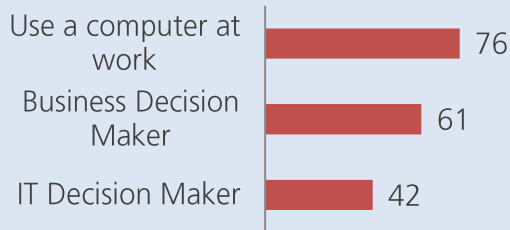
2010 BSA Global Software Piracy Study

South Africa Support for Intellectual Property Rights

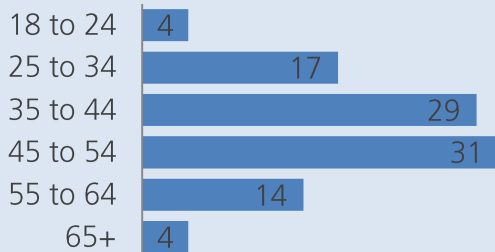
Survey Details

- All respondents installed software in the last year
- 76% use a computer at work
- Gender break 60/40 male/female
- Survey conducted online Jan 20- Feb 23, 2011

Work use



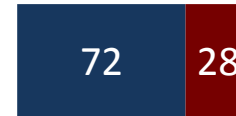
Age of Respondents



Support for IPR

- South African respondents show strong support for innovators as well as discrete elements of intellectual property rights. South African responses are on par with the global average.
 - 72% say innovators should be rewarded vs. the global average of 71%.
 - On the discrete elements 78% say IP rewards creativity, 61% say IP is good for local employment, and 60% say that IP benefits the local economy. Each of these attitudes are within a few points of the global average

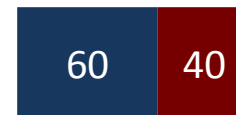
Inventors should be rewarded vs. Benefits should flow to society



Intellectual property rights creates jobs vs. IPR too expensive



Intellectual property rights benefits local econ vs. IPR helps Multi-Nationals



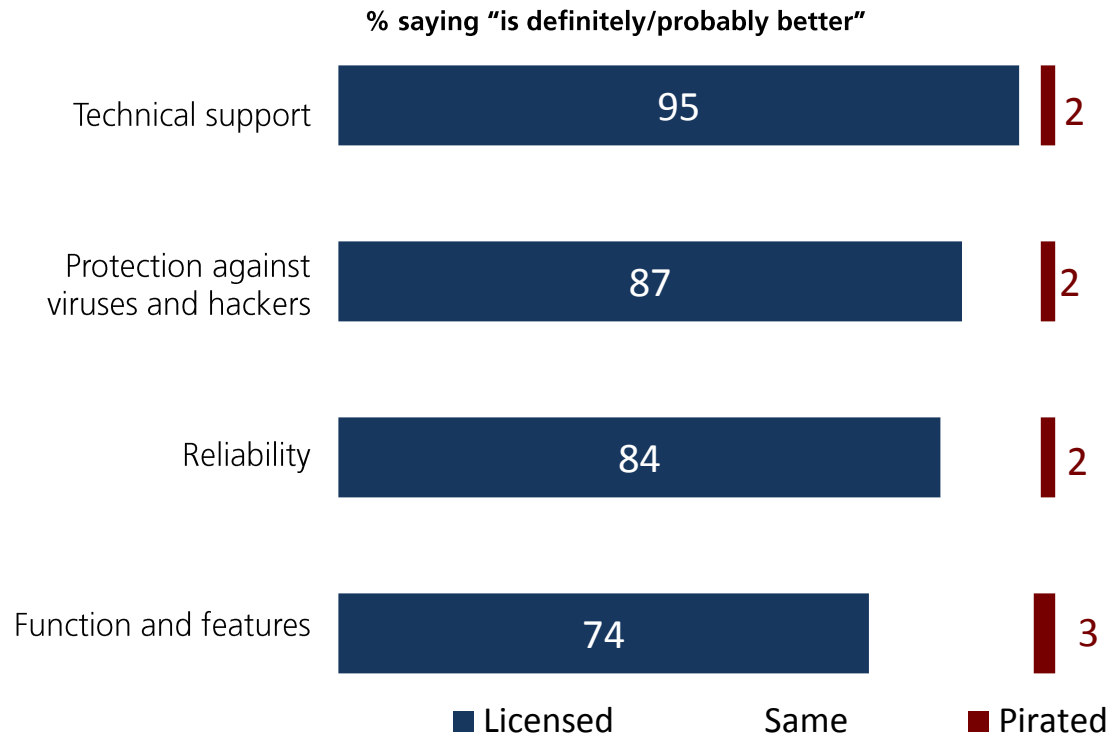
■ Pro-IP DK/NS ■ Anti-IP

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South Africa Preference for Licensed Software

Licensed vs. Pirated Software

- South African respondents feel strongly that licensed software is superior to unlicensed software and are again on par with the global average.
 - A strong majority of South Africans say that licensed software is superior when it comes to technical support (95%), protection against malware (87%), reliability (84%), and functionality (74%).



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South Africa Awareness of Software Acquisition Channels

Channel Legality

- South African consumers are very aware of legal vs. illegal methods to acquire software.
 - Few South Africans say that multiple installations at home (34%) multiple installations at work (23%), installing “loaned” software (11%), street markets (10%) or peer-to-peer networks (21%) are legal ways to acquire software.
 - However, most do think that auction websites (66%) provide legal software.

