EUROPEAN CITIZENS AND INTELLECTUAL PROPERTY:

PERCEPTION, AWARENESS, AND BEHAVIOUR - 2023

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This survey has been commission by the EUIPO to NTTDATA and Ipsos

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Foreword

This report presents the findings of the 2023 study on ‘European Citizens and Intellectual Property: Perception, Awareness and Behaviour. This fourth edition was conducted entirely online, and aims to gather knowledge on European consumers’ attitudes towards intellectual property (IP), the degree to which they respect these rights, and their general perception of IP . The report is based on 25,824 interviews with residents aged 15 and older in all EU Member States.

The report finds that a clear majority of Europeans understand the concept of IP, and there is a consensus on the importance of respecting IP to protect the rights and income of producers of goods and content, as well as the quality of their products.

The report also shows that most Europeans reject justifications for buying counterfeit goods. They believe that counterfeit goods support unethical behaviour, criminal organisations, and have a negative economic impact by ruining businesses and jobs.

Just over 1 in 10 Europeans admit to having bought counterfeit goods, with younger Europeans twice as likely as older ones to have done so. Additionally, around 4 in 10 have questioned whether a product they have bought is counterfeit. While the percentage of Europeans that report having intentionally bought counterfeit products remains low, at 13%, this is higher than in previous editions of the study.

The majority of Europeans believe it is unacceptable obtaining digital content from illegal sources, even if it is for personal use, if the price of legal content is too high, or if the content is not available via legal sources. Most Europeans are aware of legal online offers and prefer to use them rather than illegal sources if affordable. Better affordability of legal sources and a wider offer are the most mentioned reasons for people to stop using illegal sources.

Overall, the report provides valuable insights into the attitudes and behaviour of Europeans towards IP and counterfeit goods, which will be helpful for policymakers and stakeholders in shaping policies and strategies to protect and promote IP rights. The results suggest that continued efforts are needed to raise awareness about the importance of respecting IP rights, especially among younger consumers.

Executive summary

This report presents the findings of the 2023 study on ‘European Citizens and Intellectual Property: Perception, Awareness and Behaviour’ (2023 IP Perception study). The overarching aim of this study is to gather knowledge on European consumers’ attitudes towards intellectual property (IP), the degree to which they respect these rights, and the concept that they have of IP as a whole.

Unlike the previous three waves of the survey, which were conducted by telephone, the 2023 IP Perception survey was conducted entirely online. This change in methodology did not allow for the usual trend analysis. Instead, the report includes general comments on changes in trends between the 2020 and 2023 waves. Given this change in mode and population, the 2023 IP Perception study provides a new baseline for future waves of the survey.

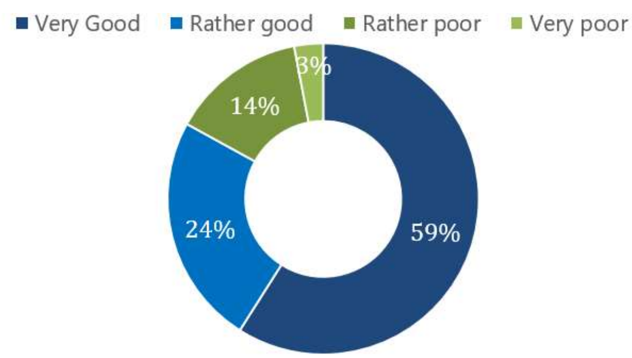
In total, 25 824 interviews were conducted between 30 January 2023 and 15 February 2023 with residents aged 15 and above, in all EU Member States.

Intellectual property – awareness and perceptions

A clear majority of Europeans say that they have a rather good or very good understanding of the concept of IP, and there is a clear consensus on the importance of respecting IP to protect the rights and income of producers of goods and content, as well as the quality of their products.

83 % of Europeans say that they have a rather good or very good understanding of the concept of intellectual property. This understanding is high, irrespective of whether or not they have engaged in buying counterfeit products or accessing online content from illegal sources. There are no important differences between these two groups.

Understanding of the meaning of the term “intellectual property” is …



Q1: Personally, would you say that you have a very good, rather good, rather poor or very poor understanding of the meaning of the term "intellectual property"? (Total base; n= 25 824)

Respondents across Europe also strongly agree on the importance of respecting IP. In line with the 2020 findings, there is a large consensus (93 %) that it is important for inventors, publishers, creators and performing artists to be able to protect their rights and be paid for their work. Likewise, most (91 %) find that respecting IP is important to keep others from inappropriately claiming to be the creator of a piece of art or the inventor of something, with a similar number (81 %) agreeing that it contributes to the quality of products and services.

Despite this widespread awareness of the importance of IP protection, not many Europeans think that consumers like themselves are the main beneficiaries of this protection (8 %). In contrast, more than half consider **performing artists such as musicians** (54 %), and **creators of artistic content** (52 %) to be the groups that benefit the most from this protection.

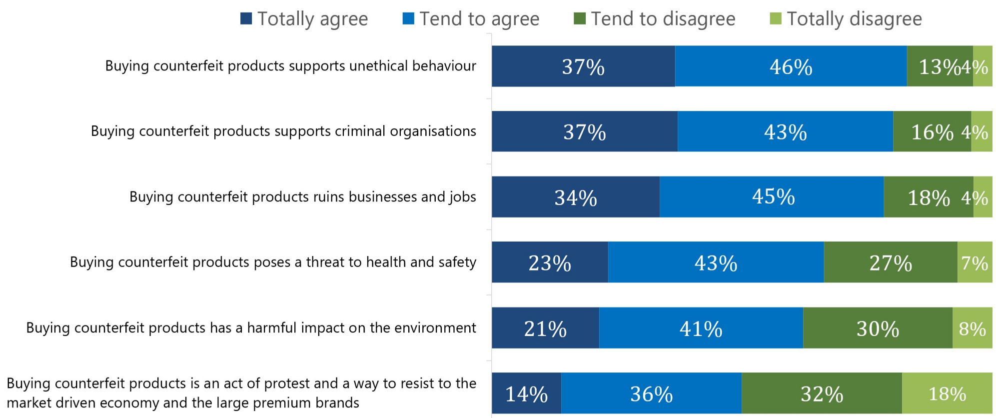
Counterfeit goods – behaviour and drivers of consumption

Europeans are generally well aware of the negative impacts of counterfeit goods and mostly reject justification for purchasing such goods. Younger people however tend to be more open to this, especially for financial reasons.

Europeans tend to be well aware of the various negative effects of buying counterfeit goods. Most commonly in this regard, they think that **it supports unethical behaviour (83 %) and criminal**

organisations (80 %). A majority also believe that it has a detrimental economic impact, by ruining business and jobs (79 %). In addition, while it is somewhat less common to consider the purchase of counterfeit goods as **a threat to health and safety and to the environment,** around two thirds also agree with this.

Understanding of the negative effects of buying counterfeit products



Q3b: To what extent do you agree or disagree with the following statements?: (Total base; n= 25 824)

Mirroring the awareness of the negative impacts of buying counterfeit goods, most Europeans continue to reject different arguments that could be used to justify this behaviour, as they did in past waves of the survey. They most strongly oppose that it would be acceptable to buy counterfeit products because everybody does it (81 %), because the original product is not or not yet available (76 %), and when it concerns luxury products (75 %). However, **around one in three tend to find it acceptable to purchase counterfeit products when the price for the original is too high.**

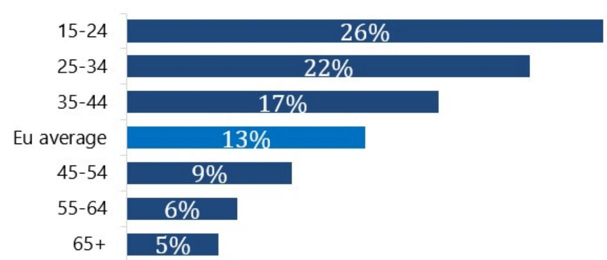
The degree of acceptance of these reasons varies with age. In general, **younger consumers are more likely to be open to justifications for purchasing counterfeit goods**, especially in relation to financial arguments. For instance, 50 % of those aged between 15 and 24 agree or tend to agree that it is acceptable to purchase counterfeit products when the price of the original product is too high and 41 % say it is acceptable to buy counterfeit luxury products.

Slightly more than 1 in 10 Europeans admit to having bought counterfeit goods, although younger Europeans do so twice as often as older ones. At the same time, around 4 in 10 have wondered whether a product they bought is counterfeit.

The percentage of Europeans that report having bought counterfeit products intentionally in the last 12 months remains low, at 13%. This is higher than in previous waves but the online character of the interview (and absence of an interviewer) may have led more respondents to admit to doing this than was the case in the past.

Younger consumers are considerably more likely to have intentionally purchased counterfeit products in the past 12 months. Around a quarter (26 %) of consumers aged between 15 and 24 said they have done so – twice the EU average.

Intentional buyers of counterfeit goods by age



Q4a: During the past 12 months, which of the following have you done? (Total base; n= 25824) – Percentage yes

Furthermore, **39 % of Europeans have wondered whether something they have bought is a genuine product or a counterfeit.** This percentage increases to 52 % among younger consumers aged between 15 and 24. At the same time, only 15 % of Europeans report buying counterfeits as a result of being misled, but again, this result is higher among the younger respondents (23 %).

Unsurprisingly, those who have intentionally purchased counterfeits are more likely than the average European to think that there are acceptable reasons for this behaviour. This is the case for all statements presented to respondents in the survey, suggesting that there is not one single reason that leads people to engage in counterfeit purchases. Most commonly they find it acceptable to buy counterfeit goods when the price of the original product is too high (71 %), and when it concerns a luxury product (63 %). The majority of counterfeit buyers also think that this behaviour is acceptable when the product is not (or is not yet) available (61 %), and when the quality of the product does not matter (61 %). More than half of them (54 %) agree that it is acceptable to buy counterfeit goods because everybody does it.

In addition to risks of harm for themselves, a lower price, better quality and larger offer of original products are important drivers for counterfeit buyers to cease buying counterfeits. Considerations of harm to others (such as the economy or producers) have a smaller impact but are more important to younger counterfeit buyers than to older ones.

A better affordability of original products remains the most often mentioned reason to stop buying counterfeit products, as was the case in previous waves of the survey (mentioned by 43 %). In addition to a lower price of original products, a larger offer and/or better quality is also commonly mentioned (25 %). In addition to these two reasons related to the offer of original products, the risks of bad experiences with counterfeits such as bad quality of the product (27 %), safety or health risks (25 %), or the risk of fines or punishment (21 %) are also relatively frequent drivers to stop consumers from buying such products.

On average it is least likely that people who buy counterfeit goods would stop doing so because of a (better) understanding of its detrimental effects on society, such as on jobs and the economy (19 %), on producers of the original products (19 %), or on the environment (16 %). Notably, young people (aged 15-24) are significantly more likely to take these effects into account (23 % for each of the above impacts).

Detrimental impacts on themselves, society and producers are the most important drivers for people who do not buy counterfeit goods to refrain from doing so, more so than the affordability, quality or availability of original products.

For people who do not buy counterfeit goods, the fact that it supports criminal organisations is the most important reason for not doing this (mentioned by 36 %). This is followed by health and safety risks (34 %) and harm caused to producers of original products (33 %).

Pirated online content – behaviour and drivers of consumption

Most Europeans are opposed to the use of illegal sources to access online content, but younger people tend to be more open to justifications of this behaviour than older ones.

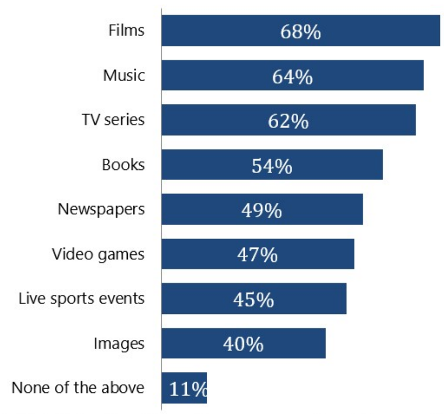
In general, most Europeans do not support obtaining digital content from illegal sources. The majority disagree with a variety of reasons that are sometimes used to justify this behaviour, such as that it is OK if only for personal use (65 % disagree or tend to disagree with this), if the price of the content is too high (72 %), or if the content is not available via a legal source (74 %).

Acceptance remains considerably higher among younger people. While only 19 % of Europeans aged 55-64, and 18 % of those aged 65 or over, agree that content can be accessed via illegal sources if the price of the content is too high, acceptance of this increases to 41 % and 46 % among those aged 25-34 and 15-24, respectively. Similarly, younger people are much more likely to agree that it is OK to access content illegally if the original product is not yet available (44 % among 15–24-year-olds agree), and if it is only for personal use (48 %).

A large majority of Europeans are aware of at least one type of legal online offer, with most of them preferring to use such offers instead of illegal sources, provided that they are affordable.

Awareness of legal online offers remains high among Europeans. Almost 9 in 10 are aware of at least one type of legal content offer available in their country, most commonly of films (68 % are aware of such offers), music (64 %), TV series (62 %), and books (54 %). Legal offers of video games, live sports events and images are less commonly known. Awareness of offers is slightly lower than these averages in the age group 15-24, with the exception of video games offers. Similarly, those aged 65 and over also tend to be less aware of different types of legal offers, with the exception of legal offers for newspapers.

Awareness of legal offers



Q6: Among the type of content listed below, for which one(s) are you aware of legal offers accessible in your country to access or download/stream them on the internet? (Total base; n= 25 824)

Most Europeans say that they prefer legal sources over illegal ones to access digital content if affordable options are available, and more than 4 in 10 have also used legal sources – significantly more than those that have used illegal sources.

In line with 2020 results, the survey shows that **Europeans tend to be very open to the use of legal offers. 80 % of Europeans say that they prefer to use legal sources to access online content instead of going for an illegal alternative, if an affordable legal option is available.** Furthermore, 69 % consider the quality and the diversity of the content offered via genuine sources better than what can be found through illegal solutions. More people disagree (46 %) than agree (36 %) that it is easier to find content via illegal sources than via legal ones. Enthusiasm about legal offers among younger people is somewhat lower although, in the 15-24 age group, 7 in 10 still prefer affordable legal options over illegal ones where affordable legal offers are available.

Reflecting this openness to legal offers, **43 % of Europeans have paid to access online content from a legal service in the past 12 months, while considerably fewer – 14 % – admit to having intentionally used illegal sources to access such content.** Notably, of those who say they have accessed content via illegal sources, 6 in 10 have **also** used paid legal sources in the past year, indicating that only a minority relies solely on illegal sources.

Use of legal online sources compared to illegal sources

For those who have not used illegal sources, the main reason for not doing so is because the content they are interested in is available via legal sources (44 %). A slightly smaller group (40 %) says that their refusal to use illegal sources is guided by an awareness of the harm this would cause to content creators. It is considerably less common for people to avoid illegal sources because of bad experiences by themselves or others (13 % and 19 %, respectively), because of the harm it would cause to jobs and the EU economy (23 %), or because they fear being caught or fined (24 %).

Reluctance to use illegal sources may also be founded in a fear of exposure to harmful practices such as scams or inappropriate content for minors. 82 % of Europeans agree that illegally obtaining online content entails a risk of such exposure. A clear majority shares this view regardless of whether they have accessed content via illegal sources or not, but agreement is higher among those who have not (85 %) compared to those who have (75 %).

Using illegal sources to access digital content is done only by a minority of Europeans but is considerably more frequent among younger age groups. Better affordability of legal sources and a larger offer are the most mentioned reasons for people to stop using illegal sources.

As noted above, a minority of 14 % of Europeans report that they have accessed or streamed online content from illegal sources. 12 % of Europeans have done this specifically to watch

sports, with 11 % saying that they have used illicit streaming devices such as set-top boxes or downloaded apps to illegally access content. The latter figure suggests an increased popularity of such tools compared to previous waves of the survey.

Accessing content from illegal sources is considerably more common than average among younger Europeans. In the 15-24 age group, 33 % report using illegal online sources intentionally, 27 % say they have streamed content from illegal sources to watch sports, and 25 % say that they have used illicit streaming devices to access content illegally – all more than double the EU average.

Those who have accessed online content via illegal sources are more likely to believe that there are reasons that justify this compared to those who have not done this. A variety of potential reasons receives majority support from this group, indicating that there is not one single driver for piracy. Most commonly, users of pirated content find it acceptable to do so when it is for their personal use (71 %), when the price of the protected content is too high (68 %), and when this content is not available on their streaming subscription (65 %).

The impact of price and availability of offers is mirrored in the fact that a **better affordability of content from legal sources and a larger offer of such are the most important reasons that users of illegal sources would stop using them** (for 43 % and 37 % of Europeans, respectively). A better understanding of the harm caused by using pirated content to the content producers or to jobs and the European economy (22 % and 21 %, respectively) are much less likely to keep people from using illegal sources.

Sharing protected content with others is done only by a small proportion of Europeans on average but is much more frequent among younger people.

11 % of Europeans have, in the last 12 months, uploaded copyrighted content in order to share it with others. This includes 42 % of those who have also accessed online content from illegal sources themselves. Like the use of illegal sources for downloading or streaming, **uploading is significantly more common among young people**. In the 15-24 and 25-34 age groups, 25 % and 21 % have done this in the last year, compared to less than 1 in 10 among Europeans aged over 44.

1. Introduction

This report presents the findings of the 2023 study on 'European Citizens and Intellectual Property: Perception, Awareness and Behaviour' (2023 IP Perception study). The overarching aim of this study is to gather knowledge on European consumers' attitudes towards intellectual property (IP), the degree to which they respect these rights, and the concept that they have of IP as a whole. More specifically, the study serves as a monitoring tool of public opinion with regards to:

1) general knowledge and perception of IP;
2) awareness of the value of IP and the damage caused by infringements;
3) counterfeit goods and pirated online content, and the reasons for buying or using these (or not);
4) the availability and quality of offers of legal online content at European Union (EU) and national level.

Compared to the previous three waves of the survey, the 2023 IP Perception study took a fresh approach by evolving from a telephone research programme to one that is conducted online; a more appropriate method in this digital age to estimate online behaviours that are vulnerable to socially acceptable answers when an interviewer is present. Given the change in mode and the populations surveyed, the 2023 IP Perception study is meant to be a standalone survey and a baseline for future online surveys. This change in methodology did not allow for the usual trend analysis, so instead the report provides general comments on changing trends.

The study was conducted among the general population aged 15 years and older in the 27 European Union (EU) Member States. The existing survey questionnaire was thoroughly reviewed and selected changes and additions were made to keep the IP Perception study up-to-date and capture new developments with regards to IP and IP infringement. The full survey questionnaire can be found in Annex 1.

The study also includes a literature review of similar surveys carried out since 2020, with the goal of identifying shifts in public knowledge / perception / opinion or shifts in the focus of the studies. The literature review informed the design of the questionnaire. A summary of the literature review's findings is presented in section 1.2.

1.1 Survey methodology

The survey was conducted in the 27 EU Member States, between 30 January 2023 and 15 February 2023. The target population included all residents aged 15 and above. In total, 25 824 interviews were completed. In 24 of the 27 countries surveyed, at least 1 000 interviews were conducted. In Cyprus, Luxembourg and Malta, a minimum of 500 respondents were interviewed. The sample size for each country is shown in Table 1.

The survey was executed using Computer-Assisted Web Interviewing (CAWI) in all countries. A non-probability/volunteer online access panel was used as a sampling frame and respondents were drawn based on the available profile data (age, gender and region) and pre-defined sub-sample sizes (i.e. quota). Data was weighted to match official population statistics on age, gender and region.

All statistical differences mentioned in the report are statistically significant unless otherwise mentioned. Statistical significance is calculated at the 95 % confidence level, meaning that the null hypothesis of no difference has been rejected at the 5 % probability level.

The percentages in this report are given without a decimal and due to rounding percentages may not add up to 100 % exactly. The bars in the charts take into account decimals, explaining small differences in the length of bars showing the same percentage.

Data collection for the survey is fully compliant with the GDPR. Personal data is asterisked out for any users of the system not directly connected to quality control. After 6 months of the project ending, all personally identifiable information data on the system will be removed. All data is stored in the EU on secure servers.

Table 1: Net sample size per country

Country	Sample size
Austria	1,013
Belgium	1,006
Bulgaria	1,003

Country	Sample size
Italy	1,020
Latvia	1,007
Lithuania	1,003

Croatia	1,008		Luxembourg	507
Cyprus	514		Malta	510
Czechia	1,007		Netherlands	1,013
Denmark	1,016		Poland	1,019
Estonia	1,014		Portugal	1,020
Finland	1,018		Romania	1,007
France	1,019		Slovakia	1,012
Germany	1,019		Slovenia	1,008
Greece	1,001		Spain	1,020
Hungary	1,012		Sweden	1,020
Ireland	1,008		TOTAL	25,824

The population subgroups that were considered by default for the analysis are reported in Table 2 and relate to the socio-demographic characteristics of gender, age, education level (low, middle, high), occupational status, and urbanisation level. In addition, three distinct groups of online content users were distinguished: 'heavy', 'limited' and 'none' users([1]).

Table 2: Sociodemographic breakdown of the sample

Variable	Proportion
Gender	
Male	48%
Female	52%
Age	
15 – 24 years	12%
25 – 34 years	14%
35 – 44 years	16%
45 – 54 years	17%

([1]) These categories were based on the question 'Content_use'. This question asked respondents whether they 1. streamed or downloaded music or audio books; 2. streamed or downloaded films or TV series; 3. streamed live sports events; 4. downloaded e-books or read e-books online; 5. read newspapers and magazines online; 6. downloaded photographs; 7. downloaded video games (this also includes app games to be played on tablets or smart phones). Respondents who had done four or more of these activities were qualified as 'heavy' users, those who had done between one and three activities as 'limited' users, and those who had not done any of these activities, as 'none' users.

Variable	Proportion
55 – 64 years	16%
65+	25%
Education Level	
Low	10%
Middle	45%
High	45%
Occupational status	
Student	6%
Working full time	46%
Working part time	10%
Unemployed	4%
Retired	25%
Looking for a job	3%
Housewife/houseman	5%
other	2%
Urbanisation level	
Rural area or village	25%
Small or middle-sized town	42%
Large town	33%
Online content use	
Heavy	37%
Limited	51%
None	11%

1.2 Literature review

A literature review was conducted, focussing on surveys on IP-related subjects published since 2020. The aim of the literature review was to capitalise on the existing body of evidence and to identify: 1) trends in public knowledge / perception / opinion on IP; and 2) shifts in the focus of the studies carried out. The literature review is useful to put the findings of the survey, presented in the following chapters, into a broader context.

The literature review was conducted by means of a structured 'rapid evidence assessment' of publicly available surveys. Searches were performed using Google Search and Google Scholar. In addition, the EUIPO asked its stakeholders for input on relevant surveys conducted in their countries during the Public Awareness Working Group Meeting that took place in November 2022. Large scale surveys targeting consumers and the general public were the focus of the review.

Each relevant survey was analysed according to the following criteria.

- Methodology:
  - online survey;
  - telephone survey;
  - other quantitative or qualitative methods (e.g. online communities, IP router analysis).
- Target respondents:
  - consumers/general population;
  - businesses.
- Geographical scope:
  - pan-European;
  - national (Australia, France, United Kingdom, United States, etc.);
  - worldwide (multi-country).
- Main focus of study:
  - understand attitudes and behaviours regarding counterfeiting and piracy;
  - knowledge and attitudes about intellectual property;
  - general online behaviour and digital content consumption.

In total, 24 new surveys and studies completed since 2020 were identified. As in the 2020 review, no pan-European surveys on IP-related topics were identified, meaning that the EUIPO's Youth Scoreboard and IP Perception surveys remain the only EU-wide surveys on IP available. All other surveys identified were worldwide and national-level surveys (a full listing is provided in Annex 2 of this report).

1.2.1 Consumption of counterfeit goods in the EU

The reviewed studies showed that the proportion of Europeans admitting to purchasing counterfeit goods has been low in recent years (5 % in 2020 according to one study) [2]. However, among different age groups, **younger Europeans aged 15 to 24 remained the most likely to admit purchasing counterfeits**. According to the 2022 Youth Scoreboard report [3], more than a third (37 %) of Europeans aged between 15 and 24 had bought at least one fake product online intentionally. This is in line with findings from a 2023 study by the United Kingdom's Intellectual Property Office [4], which found that 31 % of Britons aged 18 to 24 had bought counterfeits – this percentage went up to 31 % in the 18-24 age group.

In terms of effective messaging to prevent the purchase of counterfeits, the same UK report tested different messages qualitatively via online communities and found the most effective ones to be about: **a) health and safety risks; b) organised crime; and c) the societal impact of the production and purchase of counterfeits** (e.g. poor working conditions) [5]. Messages about the economic impact on the retail sector and the risks of fraud and scams were comparatively **less** effective in reducing levels of counterfeit purchasing.

1.2.2 Consumption of legal and pirated online content

Regarding online behaviour, a key finding of the studies reviewed is that the COVID-19 pandemic expediated the digitalisation of entertainment content and pushed consumers towards streaming services, over traditional TV or cinema [6]. Within this context, central factors that have determined

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(2) EUIPO (2020). European Citizens and Intellectual Property: perception, awareness, and behaviour – 2020 – available at: https://euipo.europa.eu/tunnel-web/secure/webdav/guest/document_library/observatory/documents/reports/Perception_study_2020/Perception_study_full_en.pdf.
(3) European Union Intellectual property office (2022). Intellectual Property and Youth Scoreboard. Doi:10.2814/249204.
(4) UK Intellectual Property Office (2023). IPO counterfeit goods research (wave 3), Part 2 – Trends – available at: IPO counterfeit goods research (wave 3) – Part 2 – Trends – GOV.UK (www.gov.uk).
(5) UK Intellectual Property Office (2023). Counterfeits goods research (wave 3), Part 5 – Communication testing – available at: https://www.gov.uk/government/publications/ipo-counterfeit-goods-research-wave-3/ipo-counterfeit-goods-research-wave-3-part-5-communications-testing.
(6) Ipsos (2020a). *Ipsos global Covid-19 tracker* – available at: https://www.ipsos.com/en/public-opinion-covid-19-outbreak; see also Ipsos (2020). *The streaming wars post-Covid* – available at: https://www.ipsos.com/en-us/knowledge/media-brand-communication/TV-Streaming-Wars-Post-Covid-The-Marketplace-New-Entrants-recording (2020). Ipsos MORI study: lockdown boosts TV viewing for 18-34s – available at: https://mediatel.co.uk/news/2020/06/05/ipsos-mori-study-lockdown-boosts-tv-viewing-for-18-34s/.

consumers' choice of legal online content have been access – any time, anywhere and on any device – and discoverability, alongside value for money and diversity of content(7). There is, however, a generational difference. Compared to older generations, millennials are less interested in ownership of content and more interested in access to content that meets their needs, as is reflected by the growing dominance of on-demand video content over physical videos or movies on the media market(8).

While some sources report an increase in piracy during the COVID-19 pandemic, there have been fluctuations in the use of online illegal sources in recent years. A recent study conducted on 14 countries across the globe(9) showed that a significant proportion of the population started using illegal sources during the COVID-19 pandemic, and that those working or learning from home were more likely to use these sources. At the same time, a 2021 EUIPO study found that, while spring 2020 saw a temporary increase in film piracy owing to widespread lockdowns around the world, digital piracy otherwise declined throughout the COVID-19 pandemic in Europe and certainly until 2020 (by 34 % between 2019 and 2020)(10). Similarly, a 2021 study on online IP infringement in the UK(11) showed that overall levels of infringement had decreased across all content categories compared to the previous 4 years (except for digital visual images). In terms of different types of online content, music digital piracy declined the most – by 81 % between 2017 and 2020. However, the most recent 2023 online copyright infringement tracker conducted in the UK(12) showed that, in most categories, infringement slightly increased compared to the previous 2021 wave. This was explained by a greater proportion of individuals using both legal and illegal sources to access online content.

Furthermore, some recent country-specific studies suggest that the underlying motivations for the consumption of pirated content have not been eradicated. For example, a recent analysis of the

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(7) Ipsos (2020b). *Context is king: winning in the new content wars* – available at: https://www.ipsos.com/en-us/knowledge/media-brand-communication/context-is-king-winning-in-the-new-content-wars.
(8) European Audiovisual Observatory (2021). *Trends in the VOD market in EU28* – available at: https://rm.coe.int/trends-in-the-vod-market-in-eu28-final-version/1680a1511a.
(9) Martinelli A et al. Piracy in Times of Covid (2022). JEL classification: O34, K42, L82.
(10) European Union Intellectual Property Office (2021a). Online copyright infringement in the European Union: music, films and TV (2017-2020), trends and drivers. p.9. Doi: 102814/505158.
(11) UK Intellectual Property Office (2021a*). Online copyright infringement tracker (10th wave)* – available at: https://www.gov.uk/government/publications/online-copyright-infringement-tracker-survey-10th-wave/online-copyright-infringement-tracker-survey-10th-wave-executive-summary.
(12) UK Intellectual Property Office (2023*). Online copyright infringement tracker (12th wave)* available at: https://www.gov.uk/government/publications/online-copyright-infringement-tracker-survey-12th-wave/executive-summary-online-copyright-infringement-tracker-survey-12th-wave.

consumption of illegal online content in France indicated that such behaviour increased slightly during 2021 (+1 % compared to 2020), particularly for music and sports live streaming (+5 % compared to 2020)([13]). A UK study found that, in 2021, **digital piracy remained driven by a lack of access to specific content via streaming subscriptions, availability on existing entertainment subscriptions, and unwillingness to pay additional costs for content beyond what was already paid for**([14]). A recent EUIPO study further corroborated this, demonstrating that piracy was most common in respect of films that had recently been released (and thus that were not yet available on streaming services) and films that had been successful in the country of production but did not enjoy a wide international distribution (i.e. no legal offer existed)([15]). In line with this, a 2023 UK report also showed that films and TV episodes had their highest ever level of infringement. Infringement level was also above average for live sports – 36 % reported using pirated sources for this([16]). Similarly, a study aimed at quantifying live TV piracy in Germany, showed that in 2022 illegal live TV streaming had doubled since 2018([17]).

At the same time, the literature suggests that **the drivers of digital piracy vary depending on the type of content in question.** For example, a recent US study showed that users of online pirated movies were most often driven by a lack of content on legal alternatives, whereas consumers of pirated TV shows often knew where to find content but were not willing to pay more than the budget they had previously allocated for it([18]). This is in line with findings from a recent Ipsos study, which found that consumers allocated a lower budget to the consumption of online content via streaming services than to traditional TV channels, despite the increasingly large and diverse online offer([19]).

(13) Hadopi (2021). *Baromètre de la consommation de biens culturels dématérialisés* – available at: https://www.hadopi.fr/sites/default/files/sites/default/files/ckeditor_files/2021_11_17_Etude_barometre_consommation_biens_culturels_dematerialises_2021.pdf.
(14) UK Intellectual Property Office (2021a*). Online copyright infringement tracker (10th wave)* – available at: https://www.gov.uk/government/publications/online-copyright-infringement-tracker-survey-10th-wave/online-copyright-infringement-tracker-survey-10th-wave-executive-summary.
(15) EUIPO (2020b). *Online copyright infringement in the European Union. Title-level study: film, music and TV* – available at: https://euipo.europa.eu/tunnel-web/secure/webdav/guest/document_library/observatory/documents/reports/2020_Online_Copyright_Infringement/2020_Online_Copyright_Infringement_in_the_EU_Title_Level_Study_FullR_en.pdf.
([16]) UK Intellectual Property Office (2023). IPO counterfeit goods research (wave 3) – available at: IPO counterfeit goods research (Wave 3) - GOV.UK (www.gov.uk).
([17]) Goldmedia (2023).Television Piracy Study 2022/2023 – available at: https://vau.net/wp-content/uploads/2023/01/VAUNET-study-on-TV-piracy-2022-2023-25.01.2023.pdf.
(18) Hub Research (2020). *Hub's 2020 privacy and piracy survey* – available at: https://hubresearchllc.com/reports/.
(19) Ipsos (2020b). *Context is king: winning in the new content wars* – available at: https://www.ipsos.com/en-us/knowledge/media-brand-communication/context-is-king-winning-in-the-new-content-wars.

In terms of socio-demographic factors associated with the consumption of online pirated content , the EUIPO 2021 study showed that, at a macro level, levels of inequality and income per capita were particularly significant variables: holding other factors constant, EU Member States with high income per capita and low income inequality levels tended to experience lower consumption of online pirated content[20]. Other factors correlating (negatively) with digital piracy in EU Member States were the number of legal platforms available and awareness of legal offers. Vice versa, higher acceptance of digital piracy and higher proportions of young people aged 15 to 24 in the population were positively correlated with levels of consumption of online pirated content ([21]). In line with these findings, the 2022 Youth Scoreboard found that the proportion of young people who have accessed content from illegal sources (either intentionally or unintentionally) has been around a third (33 %) since 2019. For most types of content from illegal sources, dedicated websites were the most popular channel for accessing the content[22].

1.2.3 Existing and future trends in IP-infringing activities

The surveys and studies reviewed mainly suggest that the consumption of both counterfeit goods and pirated online content has been low in the EU as a whole. At the same time, however, **IP-infringing activities and conversations are increasingly taking place on social media platforms**, thus limiting law enforcement authorities' ability to take action. A recent EUIPO study showed how conversations about the purchase of counterfeits took place mainly on Instagram – reflecting its capacity as a 'virtual showroom' of goods – whereas Twitter and Reddit were more often used for conversations about digital pirated content[23]. The study further noted that social media platforms were increasingly being deliberately used by providers and consumers to avoid being tracked when engaging with IP-infringing content/services online – as evidenced by the growth of burner accounts,

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(20) European Union Intellectual Property Office (2021a). Online copyright infringement in the European Union: music, films and TV (2017-2020), trends and drivers. Doi: 102814/505158.
(21) Ibid (2021), p.11-12.
([22]) European Union Intellectual Property Office (2022). Intellectual Property and Youth Scoreboard. Doi:10.2814/249204.
(23) EUIPO (2021c). *Monitoring and analysing social media in relation to IP infringement* – available at: https://euipo.europa.eu/tunnel-web/secure/webdav/guest/document_library/observatory/documents/reports/2021_Monitoring_and_analysing_social_media_in_relation_to_IPR_Infringement_Report/2021_Monitoring_and_analysing_social_media_in_relation_to_IPR_Infringement_Report_FullR_en.pdf.

scam accounts, spambots, the use of closed groups and chat groups, as well as of private communications and instant messaging services (24).

Not only do **social media platforms** provide users with a vehicle through which to engage in IP-infringing activities without easily being tracked, but they **have also created an opportunity for influencers and other public figures to exert significant influence as 'trusted others' when it comes to illegal behaviour**. A 2021 UK IPO study found that 10 % of female respondents surveyed were prompted to purchase counterfeits by 'deviant' social media influencers, who assisted consumers in constructing a rationalisation that neutralised residual concerns about counterfeit- or piracy-related personal risks, broader societal harms and perceptions of deviance (25). In the face of these new trends and behaviours, the study noted that a combination of more affordable and easily accessible legal online content/genuine products, effective messaging on social media platforms and more collaboration between social media platforms, IP owners and law enforcement authorities, may further help in the fight against digital piracy and the purchase of counterfeits.

(24) EUIPO (2021d). Social media discussion paper: New and existing trends in using social media for IP infringement activities and good practices to address them – available at: https://euipo.europa.eu/tunnel-web/secure/webdav/guest/document_library/observatory/documents/reports/2021_Social_Media/2021_Social_Media_Discussion_Paper_FullR_en.pdf.
(25) UK IPO (2021c). Social media influencers and counterfeit goods – available at: https://www.gov.uk/government/publications/social-media-influencers-and-counterfeit-goods/social-media-influencers-and-counterfeit-goods-executive-summary.

2. Intellectual property – Awareness and opinions

Consumers' self-reported understanding of the term 'intellectual property' (IP) remains high at 83 %, although this varies widely across countries. Awareness of IP is above 80 %, both among people who have bought counterfeit products or accessed online content illegally, and among those who have not – indicating that IP awareness has no significant impact on the likelihood of engaging in behaviour that breaches IP.

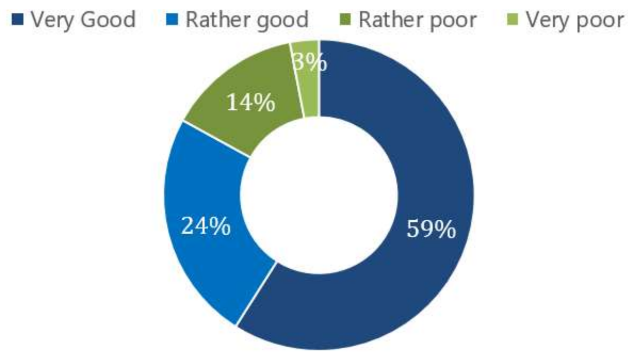
Overall, consumers recognise the value of protecting IP. More than 9 in 10 consumers (93 %) agree that it is important that inventors, creators and performing artists can protect their rights and be paid for their work, and 91 % believe respecting IP is important to avoid others claiming to be the creator of a piece of art or the inventor of something, when in reality that is not the case. Understanding of the importance of IP is high across countries, and socio-demographic groups. Notably, it is also high amongst those who have infringed IP by having bought counterfeit goods or having accessed digital content from illegal sources.

IP is typically seen to benefit mostly performing actors, creators of artistic content and inventors. Only a small minority of Europeans (8 %) believe that IP mostly benefits people like themselves.

2.1 General Understanding of the concept of IP

Although not directly comparable due to the change in methodology from telephone interview to an online survey, subjective understanding of the concept of IP continues to be high amongst Europeans. Around 8 in 10 (83%) say that they have a very good or rather good understanding of this concept.

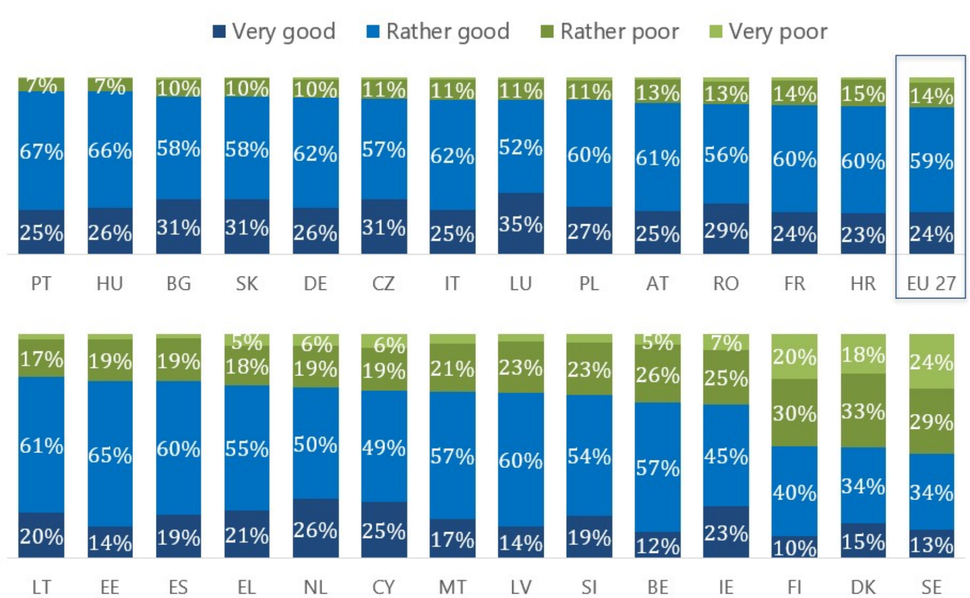
Figure 2.1.1. Understanding of the term Intellectual Property



Q1: Personally, would you say that you have a very good, rather good, rather poor or very poor understanding of the meaning of the term "intellectual property"? (Total base; n= 25 824)

However, understanding varies considerably between countries. The proportion of people who claim a very good or rather good understanding of IP ranges from 92 % in Portugal and Hungary to 47 % in Sweden. Besides Sweden, self-reported understanding of IP also falls below 50 % in Denmark (49 %) and Finland (50 %).

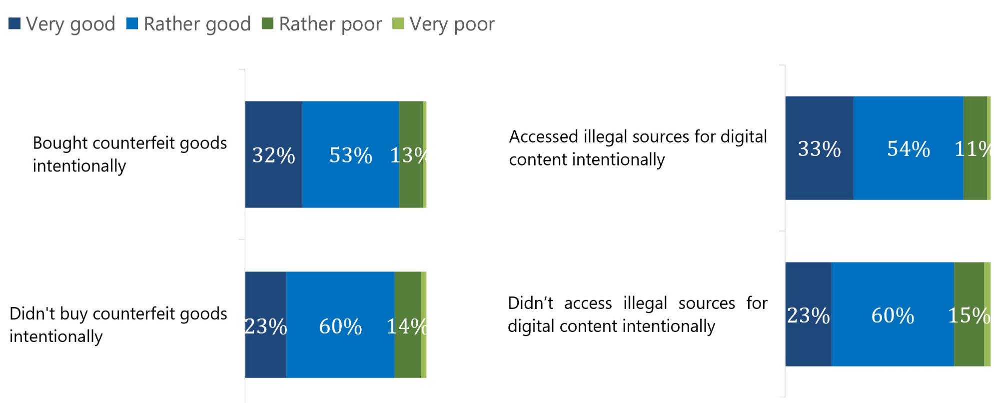
Figure 2.1.2. Understanding of the term Intellectual Property by EU countries



Q1: Personally, would you say that you have a very good, rather good, rather poor or very poor understanding of the meaning of the term "intellectual property"? (Total base; n= 25 824)

Subjective understanding of IP is above 80 %, both among people who have engaged in buying counterfeit products or accessing online content from illegal sources, and among those who have not done this. Differences among both groups are small, although the former are slightly more likely to claim an understanding of IP than the latter. Among those who report having bought counterfeit goods in the last 12 months, 85 % say they have a very good or rather good understanding of IP, compared to 83 % among those who have not. The difference is similar between those who have and have not accessed online content (87 % versus 83 %, respectively).

Figure 2.1.3. Understanding of IP by purchase of counterfeit and accessing digital content from illegal sources



Q1: Personally, would you say that you have a very good, rather good, rather poor or very poor understanding of the meaning of the term "intellectual property"? (Total base; n= 25 824)

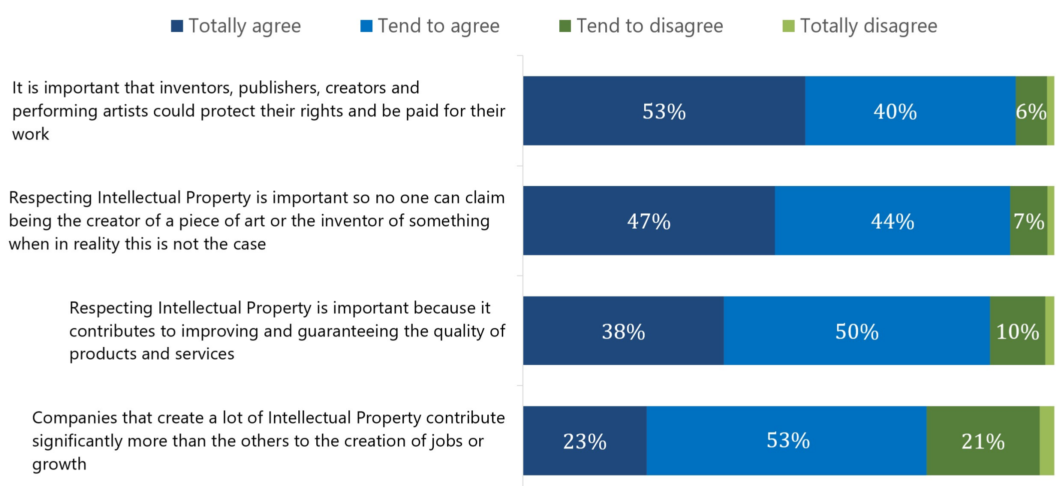
2.2 Understanding of the value of IP

A large majority of Europeans agrees on the value of respecting IP. The consensus is highest when it comes to the importance of IP to protect producers of IP-protected content, and to avoid others inappropriately claiming ownership over this content. In line with the 2020 findings, more than 9 in 10 (93 %) totally agree or tend to agree that it is important that inventors, publishers, creators and performing artists can protect their rights and be paid for their work (see figure 2.2.1). Likewise, 91 % think that respecting IP is important so that no one can claim to be the creator of a piece of art or the inventor of something when in reality they are not. 88 % also think that IP is important because it contributes to improving and guaranteeing the quality of products and services.

Although still drawing support from a majority of respondents, there is slightly less consensus about the contribution of IP to the economy. Around 3 in 4 (76 %) agree that companies that create a lot of IP contribute significantly more than others to the creation of jobs or growth.

The perception of the benefits of IP remains high across countries and socio-demographic groups. However, people who have infringed IP (by purchasing counterfeits or accessing digital content from illegal sources) are overall slightly less likely to agree with these statements compared to the average consumer. For example, less than 8 in 10 consumers who have intentionally bought counterfeit goods (79 %) or accessed digital content through illegal sources (77 %), totally agree or tend to agree that respecting intellectual property is important because it contributes to improving and guaranteeing the quality of products and services, compared to 88 % on average.

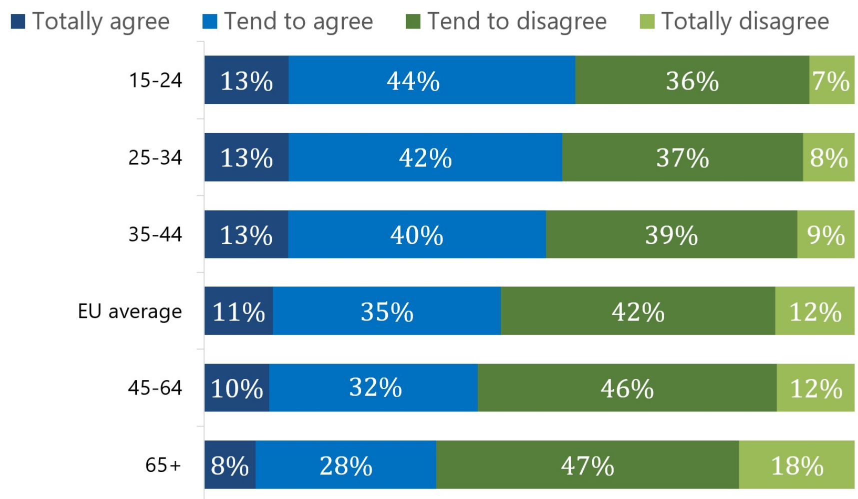
Figure 2.2.1. Understanding of the benefits of IP



Q5: To what extent do you agree or disagree with the following statements ? (Total base; n= 25 824)

European are divided on whether strict IP protection may curb innovation. As shown in figure 2.2.2, 46 % totally agree or tend to agree that strict protection of IP may curb innovation. However, opinions on this vary with age. Almost 6 in 10 (57 %) of the younger Europeans, aged between 15 and 24, believe that severe IP protection may affect innovation. People who have engaged in IP infringement are also more critical of this aspect: two thirds of consumers who have intentionally bought counterfeit products (66 %) or have accessed online content via illegal sources (67 %) agree that strict protection of IP curbs innovation, considerably above the 46 % EU average.

Figure 2.2.2. Perception- Strict protection of IP may curb innovation

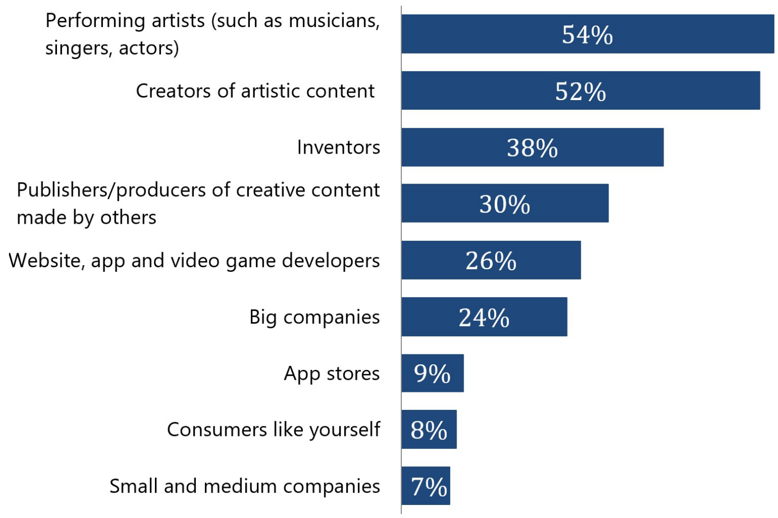


Q5: To what extent do you agree or disagree with the following statements ? (Total base; n= 25 824)

When asked who they think benefit most from IP protection, the most commonly named groups are performing artists such as musicians, singers and actors (54 %), and creators of artistic content such as writers and painters (52 %). Non-artistic groups are also frequently mentioned, albeit less commonly, such as inventors (38 %) and developers of websites, apps or video games (26 %). Only rarely do people see consumers like themselves as the main beneficiaries of IP protection (8 %).

Notably, people are much more likely to think that big companies benefit from IP protection than small and medium companies (SMEs): while 24 % say big companies are the main beneficiaries of IP protection, only 7 % think this is the case for SMEs.

Figure 2.2.3. Main beneficiaries of IP protection



Q2: In your opinion, who benefits the most from the protection of intellectual property? Please select maximum 3 (Total base; n= 25 824)

3. Counterfeit goods – Behaviour and drivers of consumption

There is a high awareness among Europeans about the negative effects of buying counterfeit goods. Most commonly, they think that it supports unethical behaviour (83 %) and criminal organisations (80 %). A majority also believes that it has a detrimental economic impact, by ruining business and jobs (79 %). In addition, while it is somewhat less common to consider the purchase of counterfeit goods as a threat to health and safety and to the environment, still around two thirds also agree with this (66 % and 62 %, respectively).

13 % of Europeans admit to having bought counterfeit products intentionally in the last 12 months. This is higher than in previous waves but the online character of the interview (and absence of an interviewer) may have led more respondents to report doing this than was the case in the past. Younger consumers are considerably more likely to have intentionally purchased counterfeit products in the past 12 months. Around a quarter (26 %) of consumers aged between 15 and 24 said they have done so – twice the EU average.

Almost 4 in 10 Europeans (39 %) have wondered whether something they have bought is a genuine product or a counterfeit. This figure rises to 52 % in the 15-24 age group. 15 % report that they unintentionally bought counterfeits as a result of being misled. This is also more common among people aged 15 to 24 (23 %).

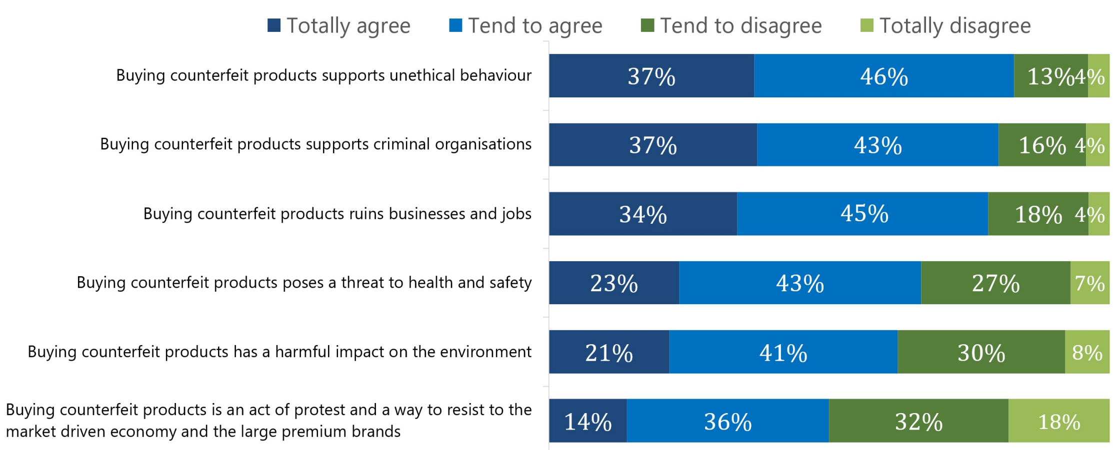
A better affordability of original products remains the most often mentioned reason to stop buying counterfeit products, as was the case in previous waves of the survey (mentioned by 43 %). In addition to a lower price of original products, a larger offer and/or better quality is also commonly mentioned (25 %). Besides these two reasons related to the offer of original products, the risks of bad experiences with counterfeits such as bad quality of the product (27 %), safety or health risks (25 %), or the risk of fines or punishment (21 %) are also relatively frequent drivers to stop buying such products.

3.1 Opinions on counterfeit goods

Overall, Europeans are strongly aware of the negative effects of buying counterfeit goods. As shown in Figure 3.1.1., around 8 in 10 (83 %) totally agree or tend to agree that buying counterfeit products supports unethical behaviour, criminal organisations (80 %), and that it ruins business and jobs (79 %). While there are fewer Europeans who see buying counterfeit goods as a threat to health and safety and to the environment, around two thirds also agree with this (66 % and 62 %, respectively).

In contrast, opinions are split on whether buying counterfeit goods can be considered as an act of protest and a way to resist the market-driven economy and large premium brands. Half of Europeans agree with this, while half disagree.

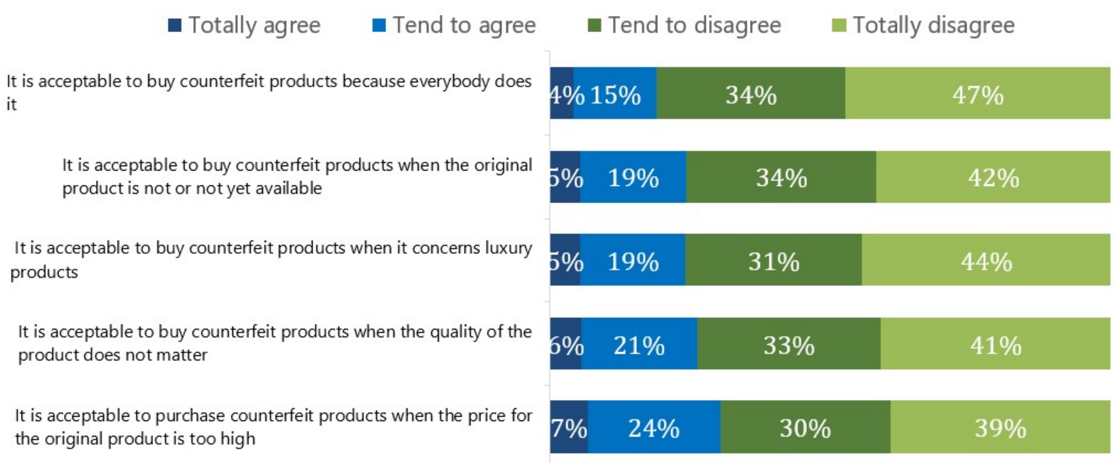
Figure 3.1.1. Understanding of the negative effects of buying counterfeit products



Q3b: To what extent do you agree or disagree with the following statements?: (Total base; n= 25 824)

Potential justifications for buying counterfeit products continue to be rejected by the majority of Europeans, as was the case in the past waves of the survey. They most strongly oppose the idea that it would be acceptable to buy counterfeit products because everybody does it (81 % disagrees or tends to disagree with this), because the original product is not or not yet available (76 %), and when it concerns luxury products (75 %). Still, around 3 in 10 (31 %) agree that it is acceptable to purchase counterfeit products when the price for the original is too high – making this the potential justification that attracts the highest level of agreement.

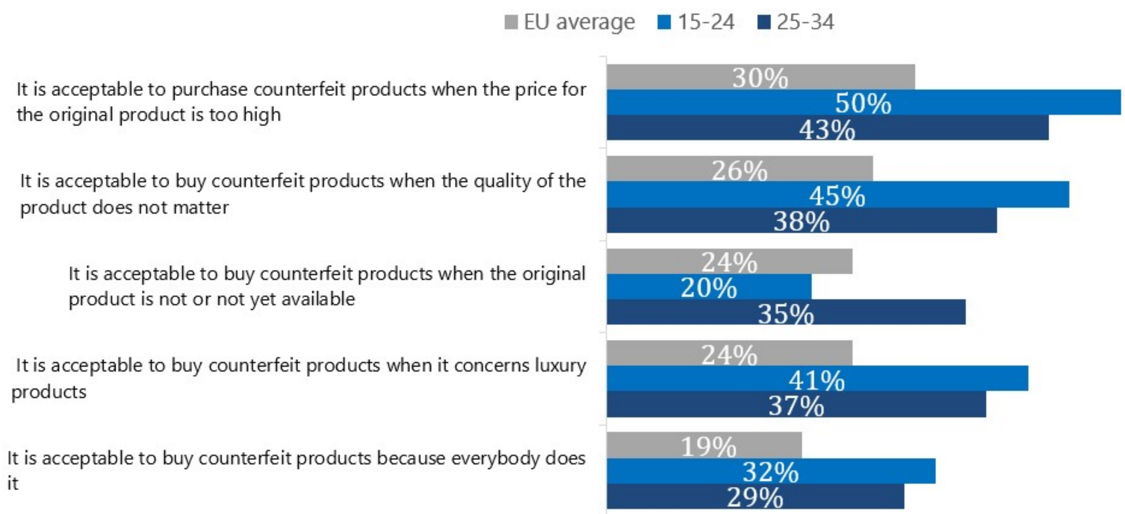
Figure 3.1.2. Attitudes towards counterfeit goods



Q3: To what extent do you agree or disagree with the following statements? (Total base; n= 25 824)

Acceptance of these reasons varies with age. Younger Europeans are more likely than the average respondent to agree with justifications for purchasing counterfeit goods, especially in relation to financial arguments. For instance, half (50 %) of those aged between 15 and 24 totally agree or tend to agree that it is acceptable to purchase counterfeit products when the price of the original product is too high and 4 in 10 (41 %) say that it is acceptable to buy counterfeit luxury products.

Figure 3.1.3. Attitudes towards counterfeit goods amongst young Europeans



Q3: To what extent do you agree or disagree with the following statements? (Total base; n= 25 824)

Similarly, Europeans with a lower level of education are more likely than the average European to agree with all the reasons presented that justify the purchase of counterfeits. The price of genuine products mainly impacts their attitudes – almost 4 in 10 (38 %) consider it acceptable to buy counterfeits when the value of original products is not affordable.

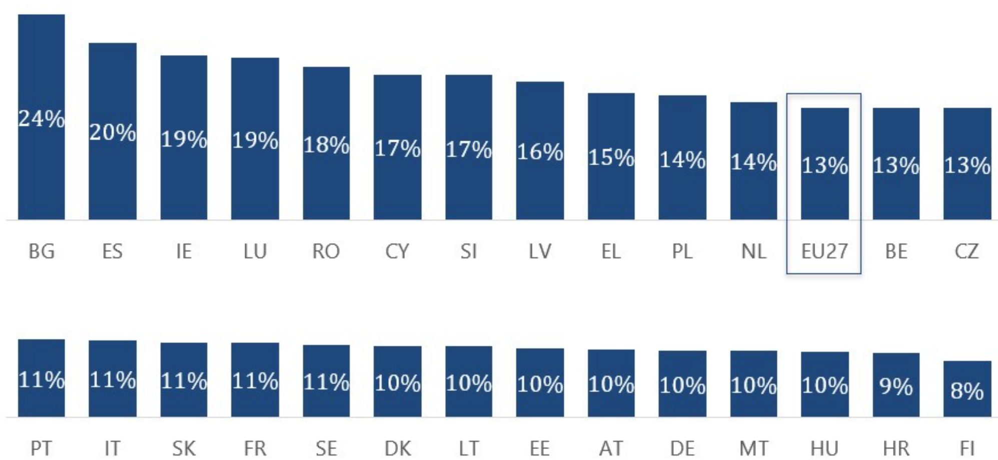
Additionally, those who have intentionally purchased counterfeits are more likely than the average European to think that this behaviour is justifiable. This is the case for all the statements presented to respondents in the survey, showing that there is not a single reason why consumers engage in this behaviour. Buyers of counterfeits most commonly consider that it is acceptable to do so when the price of the original product is too high (71 %). Slightly more than 6 in 10 also consider that this behaviour is acceptable when the original product concerns luxury products (63 %), when the product is not (or not yet) available (61 %), and when the quality of the product does not matter (61 %). More than half (54 %) also agree that it is valid to buy counterfeit goods because everybody does it.

3.2 Consumption of counterfeit goods

The percentage of Europeans that report having intentionally bought counterfeit products in the last 12 months is 13 %. This is higher than in previous waves (e.g. it was 5 % in 2020), but the online character of the interview (and absence of an interviewer) is likely to have impacted these results. In particular, the absence of an interviewer can have led more respondents to respond more freely and honestly, and admit to buying counterfeit goods, than was the case in the past.

However, the incidence of self-declared purchases of counterfeit goods varies widely between countries, ranging from 24 % in Bulgaria, to 8 % in Finland. Besides Bulgaria, intentional purchase of counterfeits is higher than the EU average by at least five percentage points in Spain (20 %), Ireland (19 %), Luxembourg (19 %), and Romania (18 %).

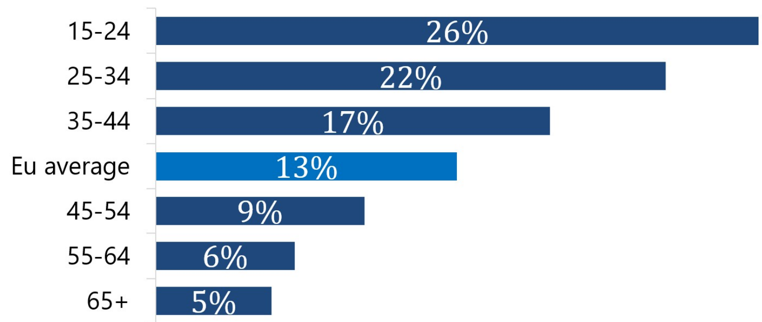
Figure 3.2.1. Intentional Buyers of counterfeit goods by country



Q4a: During the past 12 months, which of the following have you done? (Total base; n= 25 824) percentage yes

Younger people are more likely than older people to admit having bought counterfeit products intentionally. Around a quarter (26 %) of consumers aged between 15 and 24 said they have done so – twice the EU average.

Figure 3.2.2. Intentional Buyers of counterfeit goods by age



Q4a: During the past 12 months, which of the following have you done? (Total base; n= 25824) – Percentage yes

Table 3 below shows the profile of intentional buyers of counterfeits. Buyers of these goods tend to be young, mainly under 44. For Europeans in the age groups 15-24, 25-34 and 35-44 consumption of counterfeits is above the EU average (see Figure 3.2.2). In contrast, purchase of these goods drops below 10 % for Europeans aged over 45. The young age of counterfeit consumers also explains why they are frequently still studying (20 %).

Purchase of counterfeits and use of illegal online sources tend to be related. More than 4 in 10 (45 %) users of online pirated content, also report buying counterfeits.

The profile of counterfeit buyers remains unchanged compared to the 2020 findings.

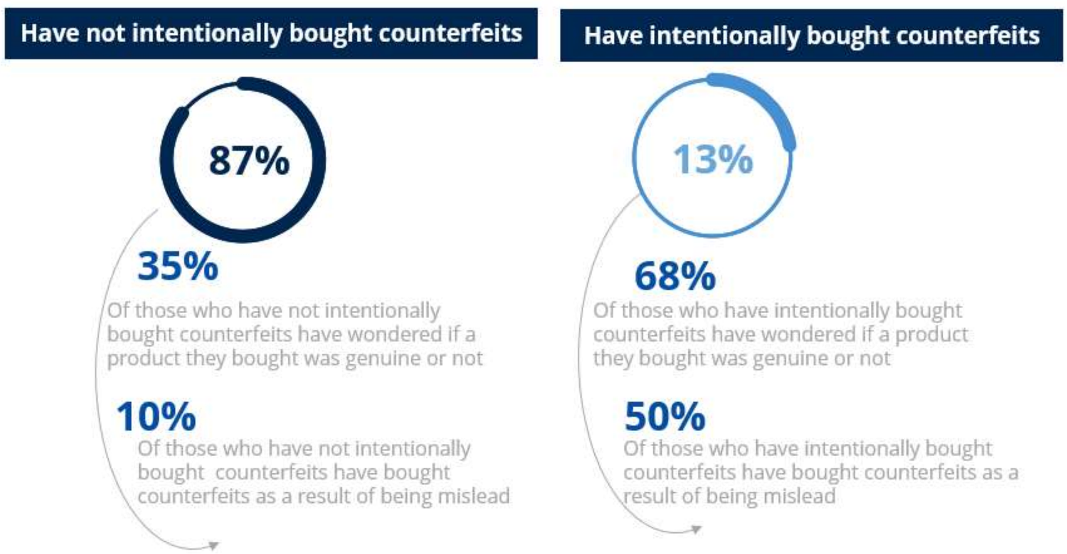
Table 3 Profile of those buying counterfeit goods intentionally

Variable	Bought counterfeit goods intentionally
Gender	
Male	14%
Female	12%
Age	
15 – 24 years	26%
25 – 34 years	22%
35 – 44 years	17%

Variable	Bought counterfeit goods intentionally
45 – 54 years	9%
55 – 64 years	6%
65+	5%
Level of Education	
Low	18%
Middle	12%
High	13%
Urbanisation	
Rural area or village	12%
Small or middle sized town	12%
Large town	14%
Occupation	
Student	20%
Working full time	15%
Working part time	14%
Unemployed	17%
Retired	5%
Looking for a job	20%
Housewife/house man	11%
Other	11%
Accessed online pirated content intentionally	
Yes	45%
No	8%

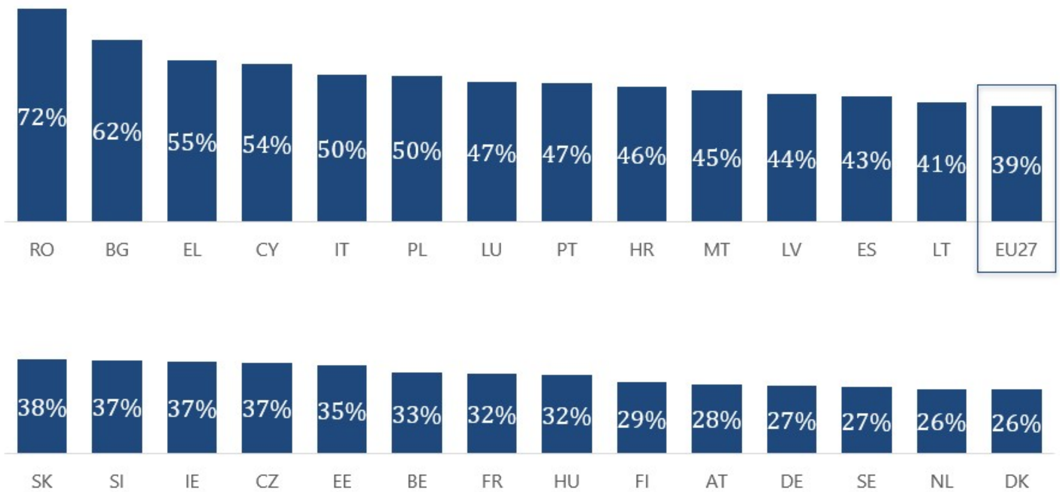
Buying counterfeits goods is not always an intentional behaviour. By contrast, a slightly larger group of Europeans (15 %) say they have unintentionally bought counterfeit in the last 12 months, as a result of being misled. Moreover, 39 % say they have found themselves in a situation where they have wondered whether the product they bought was counterfeit or not. This unintentional and potentially unconscious exposure to counterfeit occurs among those who say they have not intentionally bought counterfeit goods, but also among intentional counterfeit buyers. 10 % of those who say that they have not intentionally bought counterfeit say they have nonetheless unintentionally done so, as the result of being misled. Moreover, 35 % in this group have, in the last year, wondered whether a product they bought was genuine or counterfeit. Notably, this unintentional exposure is even more common among those who **did** intentionally buy counterfeit in the last year. 50 % of them say that they have also been misled to buy counterfeit goods unintentionally in that period, and 68 % report that they have wondered whether a product they have bought was genuine or not.

Figure 3.2.3. Behaviour of non-intentional buyers compared to intentional buyers of counterfeits



Figures regarding Europeans wondering whether a product they bought is genuine or counterfeit and buying counterfeit products as a result of being misled, vary widely between countries. In the first situation, while around a quarter of consumers in Denmark (26 %) and the Netherlands (26 %) have been uncertain if a product they bought is genuine or not, this increases to 72 % in Romania. In addition, while around a third of consumers in Bulgaria (31 %) have bought counterfeits as a consequence of being misled, this has only been the case for 9 % of consumers in Hungary.

Figure 3.2.4. Wondered if a product bought was genuine or not by country



Q4a: During the past 12 months, which of the following have you done? (Total base; n= 25 824)

Younger people, in addition to being more likely to say that they have intentionally bought counterfeit goods, also more often report that they have unintentionally done this as a result of being misled. This goes for 23 % of those aged 15-24, and 24 % among the group aged 25 to 34. Younger Europeans are also more likely than average to have wondered in the last year whether a product they bought was genuine or counterfeit (52 % and 48 % among 15-24-year olds and 25-34-year olds, respectively).

3.3 Reasons for buying or not buying counterfeit goods

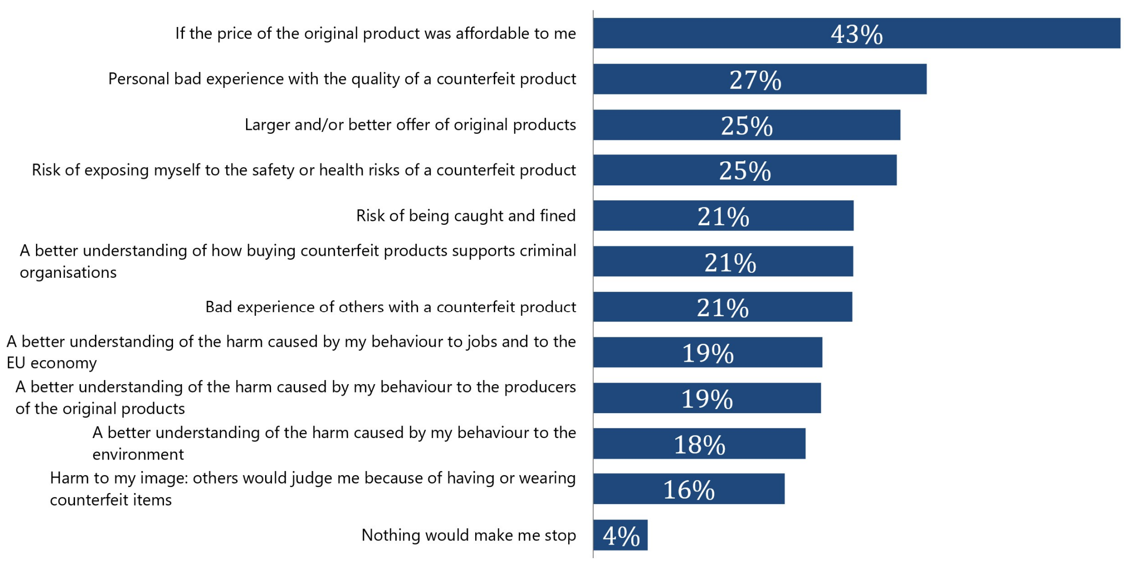
Reasons not to buy counterfeit goods vary between those who have bought them intentionally and those who have not. While for the first group more affordable prices would make them stop buying these products, the second group is mainly driven by their understanding of the negative effects of counterfeit purchases.

As in 2020, for Europeans who report having bought counterfeit products intentionally in the last year, a lower price of genuine products remains the main reason that would make them stop purchasing counterfeits: slightly more than 4 in 10 (43 %) consider that if the price of the original product were affordable to them, they would stop this behaviour. This is the most commonly named reason in all

EU Member States. 25 % also say that a larger and/or better offer of original products would be a reason for them to stop buying counterfeits.

Besides these two reasons related to the offer of original products, **the risk of being exposed to bad experiences with counterfeits** such as a bad quality of the product (27 %), safety or health risks (25 %), or the risk of being caught and fined (21 %) are also relatively frequent drivers to stop buying such products. Finally, **a (better) understanding of the detrimental effects to society**, such as to jobs and the economy (19 %), to producers of the original products (19 %), or to the environment (16 %), are mentioned least often as potential reasons to stop buying counterfeits.

Figure 3.3.1. What are all element that would make you stop buying counterfeit goods?



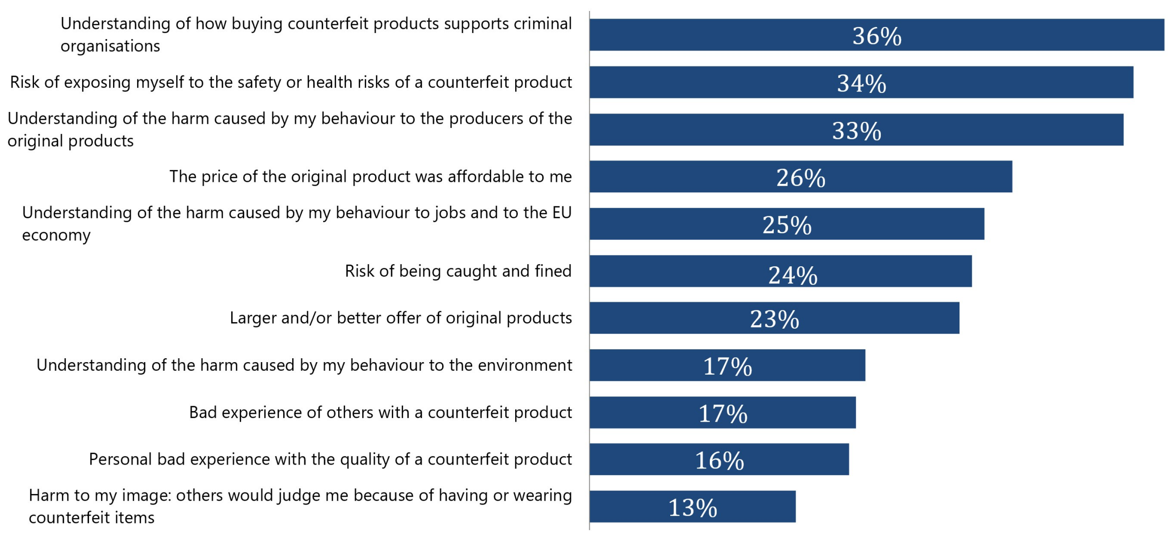
Q8a: You indicated that you have intentionally bought counterfeit products during the past 12 months. What are all the elements that would make you stop buying counterfeit products? (Total base; n= 3 410)

Reasons to stop buying counterfeits vary with age in several respects. Firstly, **younger Europeans who have bought counterfeits are less likely than older Europeans to think a more affordable price of original products would make them stop doing that** – 40 % among 15-24 year olds and 37% in the 25-34 age group – compared to 43 % on average, and 58 % among people over 65. However, it remains the most important driver to stop buying counterfeits (even among the younger age groups). In contrast, **younger Europeans are significantly more likely than average to say**

that a (better) understanding of the detrimental impact of counterfeits on society and the environment would make them stop buying them. This goes for 23 % of 15-to-24 year olds when it comes to harm caused to jobs and the EU economy or to the producers of the original products (versus 19 % on average for both), and 22 % when it comes to harm caused to the environment (versus 18 % on average).

Among people who have not bought counterfeit products intentionally, detrimental impacts on themselves, society, and producers are the most important drivers not to buy counterfeits, more so than the affordability, quality or availability of original products. They most often mention the fact that it supports criminal organisations (36 %), in addition to health and safety risks (34 %) and harm caused to producers of original products (33 %).

Figure 3.3.2. You indicated you have not intentionally bought counterfeit goods. What was the reason for this?



Q8b: You indicated that you have NOT intentionally bought counterfeit products during the past 12 months. What was the reason for this?
(Total base; n= 22 414)

Here too, results differ with age. Those aged 15 to 24 are significantly less likely than average to be guided by the above three reasons (25 %, 27 %, 26 %, respectively). In contrast, people in this age group are more sensitive than average to potential harm to their image. 19 % say that the risk of such harm keeps them from buying counterfeit, compared to 13 % on average.

4. Online pirated content – Behaviour and drivers of consumption

A majority of Europeans oppose the use of online pirated content, and only a minority support for potential justifications for this behaviour. However, around a third (34 %) do consider it acceptable to use pirated content when it is for personal use. Acceptance of reasons that justify this behaviour is also considerably higher among younger respondents than older ones.

A minority of Europeans (14 %) admit to having intentionally used illegal sources to access online content. In the 15-24 age group, however, intentional use of illegal sources is more than twice as common – 33 % in this age group say they have done this.

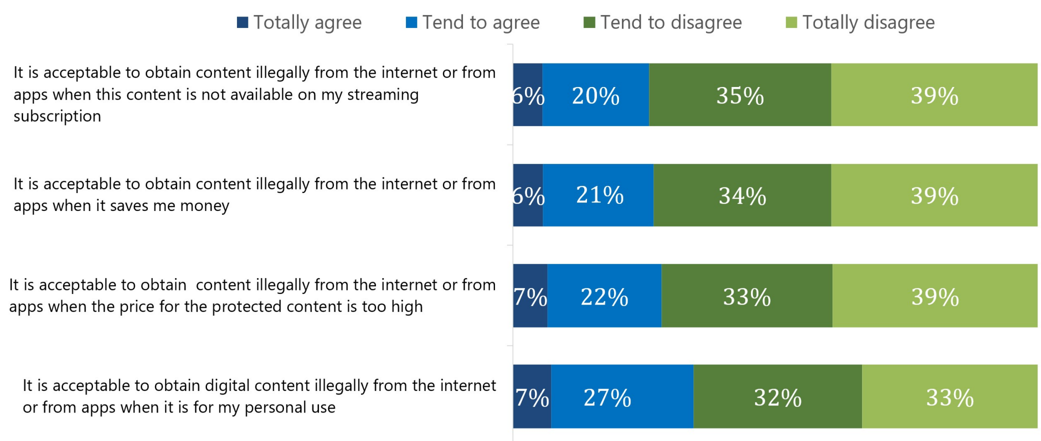
At the same time, most Europeans (61 %) who report having accessed content via illegal sources have also used paid legal sources in the past year, indicating that only a minority relies solely on illegal sources to access digital content.

A better affordability of content from legal sources is the most common reason that would make users of online content from illegal sources stop doing this, with 43 % of them mentioning it. Among those who have not used illegal sources, the main reason not to do so is that the content they are interested in is available via legal sources (44 %).

4.1 Attitudes towards pirated online content

In general, most Europeans believe that it is unacceptable to access content from illegal online sources. More than 7 in 10 Europeans disagree that it would be acceptable to use illegal sources if the content they are looking for is not available on their streaming subscription (74 %), if it saves them money (73 %) or if the price of the protected content is too high (72 %). However, still around a third (34 %) agree that it is acceptable to obtain digital content illegally if it is for personal use.

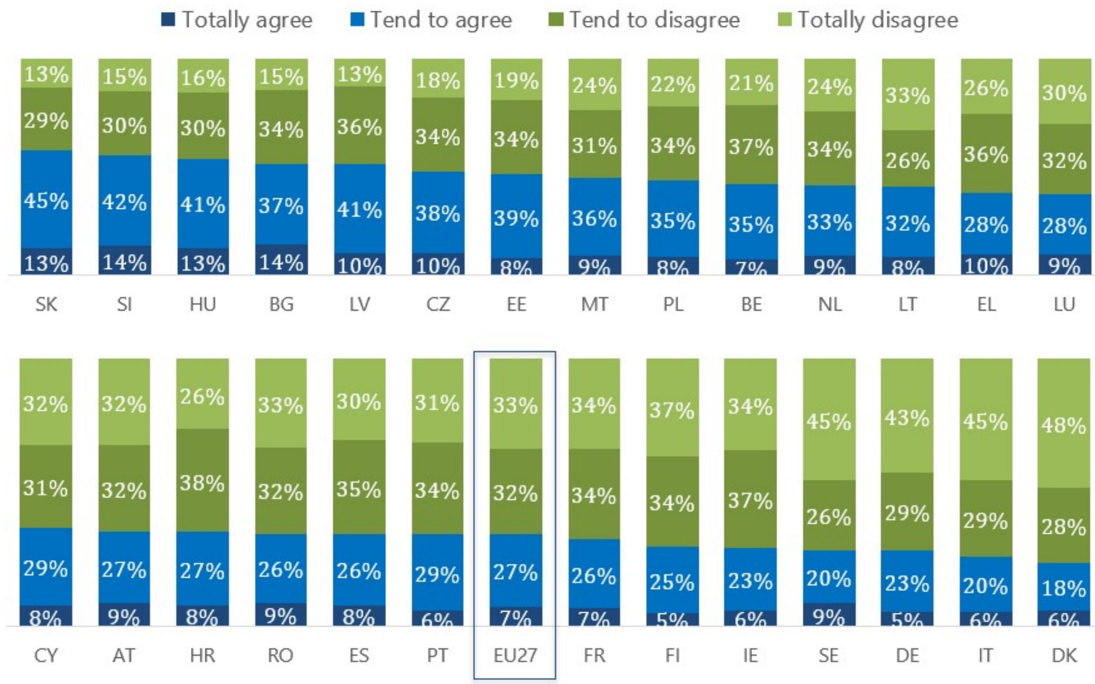
Figure 4.1.1 Acceptability of illegally obtaining online content



Q3: To what extent do you agree or disagree with the following statements?: (Total base; n= 25 824)

The degree to which people accept such potential justifications varies between countries. For instance, the proportion of people who totally agree or tend to agree that it is acceptable to obtain content illegally from the internet when it is for personal use, ranges from a low of 24 % in Denmark to a high of 58 % in Slovakia. In addition to Slovakia, this statement receives (slight) majority support in Slovenia (56 %), Hungary (54 %), Bulgaria (51 %), and Latvia (51 %).

Figure 4.1.2 Attitudes towards online pirated content - It is acceptable to obtain online content illegally when it is for my personal use

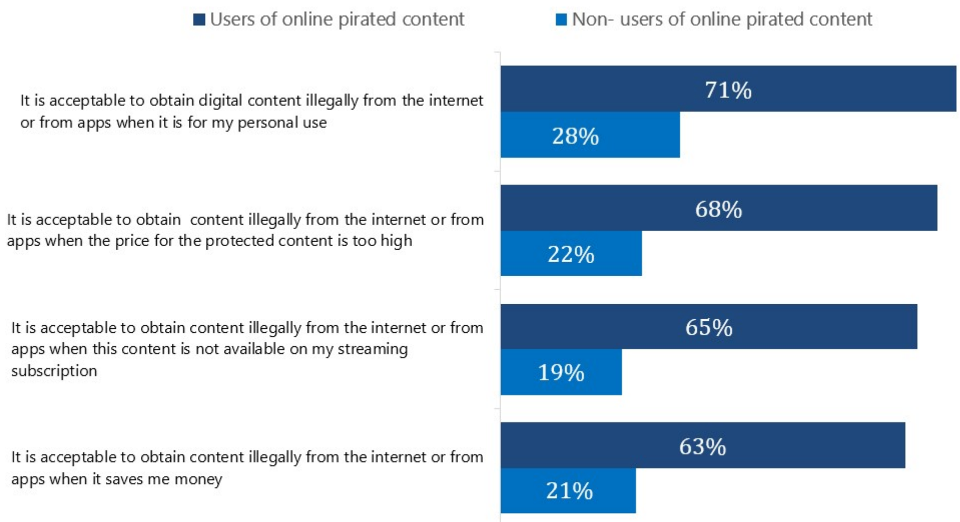


Q3: To what extent do you agree or disagree with the following statements?: (Total base; n= 25 824)

In line with the findings from previous waves of the survey, acceptance of reasons that justify illegal online behaviour remains considerably higher among younger Europeans compared to older ones. While 19 % of Europeans aged 55-64 and 18 % of those aged 65 and over agree that content can be accessed via illegal sources if the price of the content is too high, this rises to 41 % and 46 % among those aged 25-34 and 15-24, respectively. Similarly, the youngest respondents (aged 15-24) are much more likely to agree that it is valid to access content illegally if it is only for personal use (48 %) compared to those aged 55-64 (27%) or aged 65 and over (28 %).

People who have intentionally accessed online content via illegal sources in the last 12 months are much more likely to believe there are reasons that justify this behaviour compared to those who have not done this. This is true for all the statements presented to respondents in this regard (see Figure 4.1.3), indicating that there is not one single driver for the use of illegal sources. Most commonly, those who have used pirated content find it acceptable to do this when it is for their personal use (71 %), when the price of the protected content is too high (68 %), and when this content is not available on their streaming subscription (65 %).

Figure 4.1.3 Acceptability of illegally obtaining online content between users and non- users of online pirated content



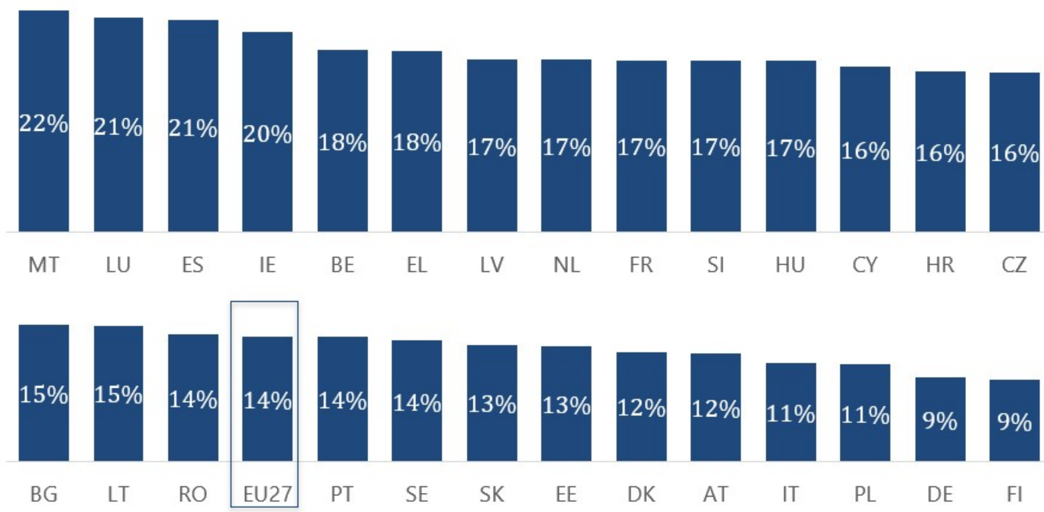
Q3: To what extent do you agree or disagree with the following statements?: (Total base; n= 25 824) – Percentage Agree/ Tend to agree

4.2 Consumption of pirated online content

As in previous waves of the survey, **only a minority of Europeans (14 %) admit to having accessed content via illegal sources intentionally in the past 12 months**. This percentage is slightly higher than in 2020, but – as with the apparent increase of counterfeit goods purchased – this may be an effect of the online nature of the survey, where the absence of an interviewer may have led to more respondents admitting to doing this than in the previous wave (when the interview was administered via telephone by interviewers).

The proportion of people admitting to using online pirated content in the past 12 months vary per country, ranging from 9 % in Finland and Germany to 22 % in Malta.

Figure 4.2.1 Intentional illicit access to online sources by country



Q4b: During the past 12 months, which of the following have you done? (Total base; n= 25 824) – Percentage yes

Table 4 below summarises the profile of intentional users of illegal online sources. This behaviour is most common among the youngest group of Europeans (aged between 15 and 24). In this group, 33 % report that they have intentionally accessed online content via illegal sources – more than twice the EU average. This figure is also above the EU average in the age groups 25-34 and 35-44 (25 % and 19 %, respectively).

Notably, ‘heavy online content users’ are also relatively more likely than the average European to use online pirated content, with 21 % of this group reporting to have obtained content from illegal online sources intentionally. Users of pirated content are also often intentional buyers of counterfeits: 50 % of those who have bought counterfeit goods intentionally in the past 12 months have also used illegal sources to access online content in that period, compared to only 9 % of those who have not intentionally bought counterfeit goods. This suggests a strong relationship between counterfeit purchases and the use of illegal sources to access online content.

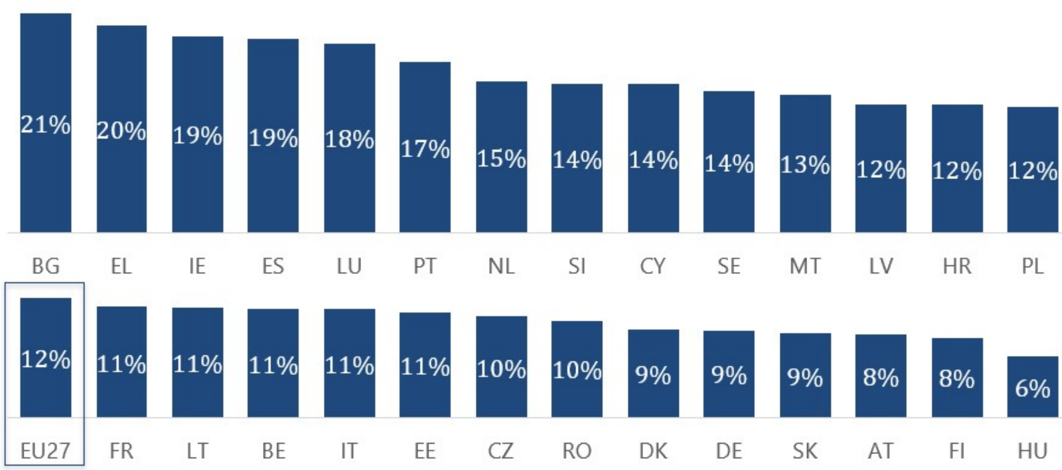
Table 4. Profile of intentional users online pirated content

Variable	Accessed online pirated content intentionally
Gender	
Male	17%
Female	12%
Age	
15 – 24 years	33%
25 – 34 years	25%
35 – 44 years	19%
45 – 54 years	10%
55 – 64 years	6%
65+	4%
Level of education	
Low	18%
Middle	12%
High	16%
Urbanisation	
Rural area or village	13%
Small or middle sized town	13%
Large town	16%
Occupation	
Student	31%
Working full time	17%
Working part time	13%
Unemployed	18%
Retired	4%
Looking for a job	19%
Housewife/house man	9%
Other	13%
Online content use	
Heavy	21%

Variable	Accessed online pirated content intentionally
Limited	11%
None	4%
Bought counterfeit products intentionally	
Yes	50%
No	9%

12 % of Europeans have used illegal sources specifically to watch sports in the last year. Again, results vary per country: it is least common in Hungary (6 %), Finland (8 %) and Austria (8 %) and most frequent in Bulgaria (21 %) and Greece (20 %).

Figure 4.2.2 Intentional illicit access to online sources to watch sports by country

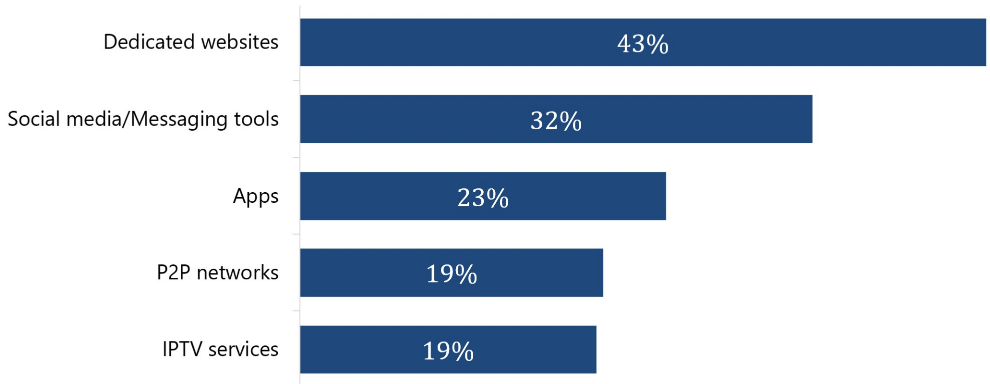


Q4b: During the past 12 months, which of the following have you done? (Total base; n= 25 824) - Percentage yes

In line with the general trend, accessing content from illegal sources to watch sports is considerably more common among younger Europeans compared to older ones. In the 15-24 age group, 27 % say that they have done this in the past 12 months, compared to less than 10 % among people aged 45 or over.

People who access online content illegally most often do this via dedicated websites – 43 % of them mention this as a channel they use. Social media or messaging tools (32 %) and apps (23 %) are also frequently mentioned. P2P networks and IPTV services (both 19 %) are used the least often. There are no marked differences between age groups or Member States when it comes to preferred channels.

Figure 4.2.3 Channels accessed to obtain content from illegal sources

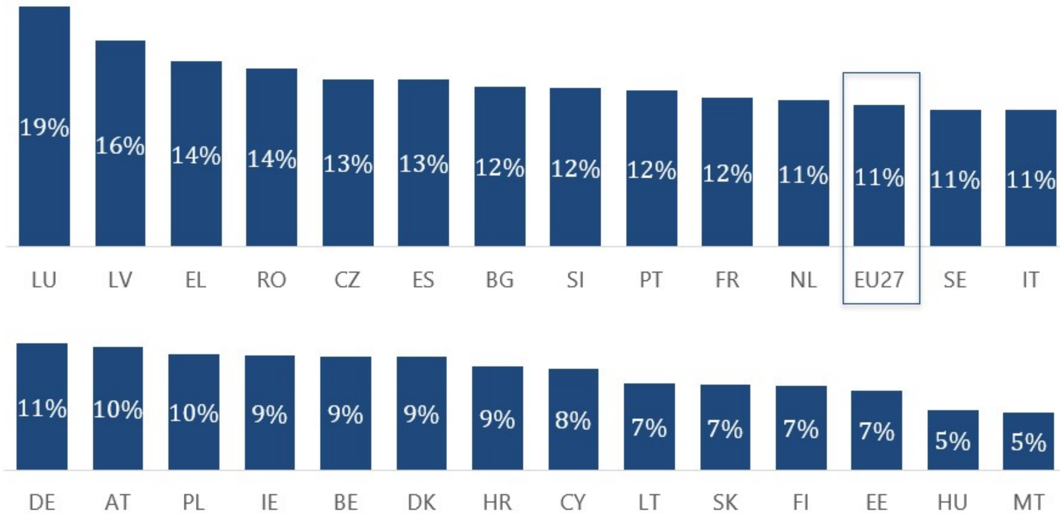


Q4c: Through which of the following channels have you intentionally accessed content provided by illegal sources? (Total base; n= 5 870)

Compared to the use of illegal sources to access online content, the uploading of copyright protected content on the internet (such as music, video, film or TV series) in order to share it with other internet users is slightly less common. 11 % of Europeans report that they have done so in the last 12 months. There is a very strong correlation between accessing content illegally and making protected content illegally accessible by uploading it: 42 % of those who have also accessed online content from illegal sources have also uploaded protected content, while only 6 % of those who have not accessed content illegally have uploaded protected content.

Looking at the country level, again considerable differences emerge, with the frequency of uploading ranging from 5 % in Malta to 19 % in Luxembourg.

Figure 4.2.4 Uploading copyright protected content on the internet to share it with other users by country



Q4b: During the past 12 months, which of the following have you done? (Total base; n= 25824) – Percentage yes

Similar to the use of illegal sources for downloading or streaming, uploading of protected content is significantly more common among young people. In the 15-24 and 25-34 age groups, 25 % and 21 % have done this in the last year, compared to less than 1 in 10 among Europeans older than 44.

Finally, it should be kept in mind that the use of illegal sources to access online content takes place in a broader, more nuanced context of digital content use. Two points are worth mentioning in this regard.

Firstly, it is rare for Europeans who access online content to **only** use illegal sources to do so. Among the people who have accessed online content in the past 12 months, the large majority have used only paid legal sources for this (see Section 5 for more details on this group) – this goes for 71 % of them. Around 2 in 10 (18 %) have used both illegal and legal sources, and only around 1 in 10 online content users (11 %) have used **only** illegal sources to access that content.

Figure 4.2.5 Use of legal online sources compared to illegal sources

Secondly, it is worth noting that Europeans are regularly uncertain about the legality of the online sources they use. Indeed, of the Europeans who have accessed online content in the last year, 41% have wondered whether a source they could use for this was legal or not. Those who say they have intentionally used illegal sources to access content are more likely to have wondered about the legality of the source, compared to those who have only used paid legal sources – 53 % v 36 %. The higher figure for users of illegal sources may not be very surprising, as they, by definition, engage more often with illegal sources and thus may also more often encounter sources of which the exact nature is unclear to them. The fact that more than 1 in 3 Europeans who say they have only used paid legal sources to access content have wondered about the legality of the sources they encountered, does however show that also for this group it may not always be easy to distinguish legal from illegal sources (and thus be fully sure that the source they use is indeed legal).

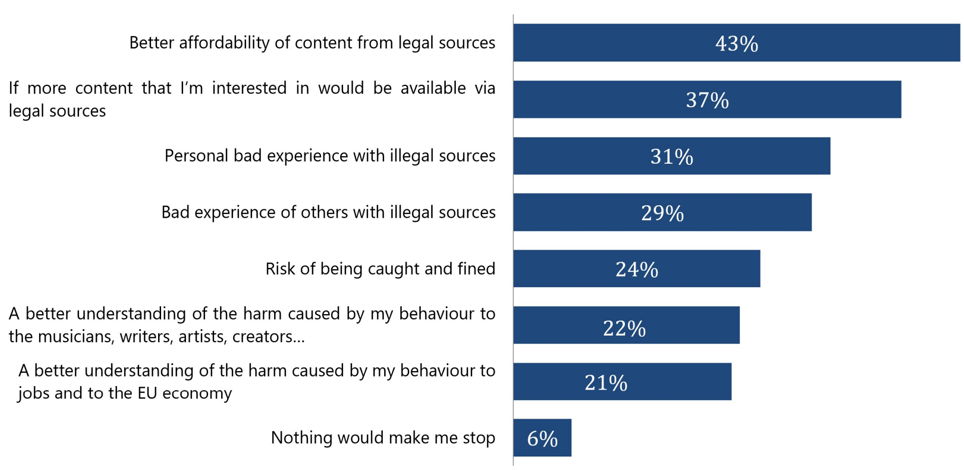
However, most people who have wondered whether a source they could use to access content was legal or not, do say that they have also researched the legality of sources – 67 % say they have done so in the last 12 months.

Figure 4.2.6. Who has wondered about legality of sources to access online content

4.3 Reasons to not use illegal online sources

Both the price and the quality of the content available via legal sources play a role in motivating users of illegal sources to stop using the latter. The most often reported reasons that would make them stop using illegal sources would be better affordability of content from legal sources (43%), and a larger availability via legal sources of content that interested them (37%).

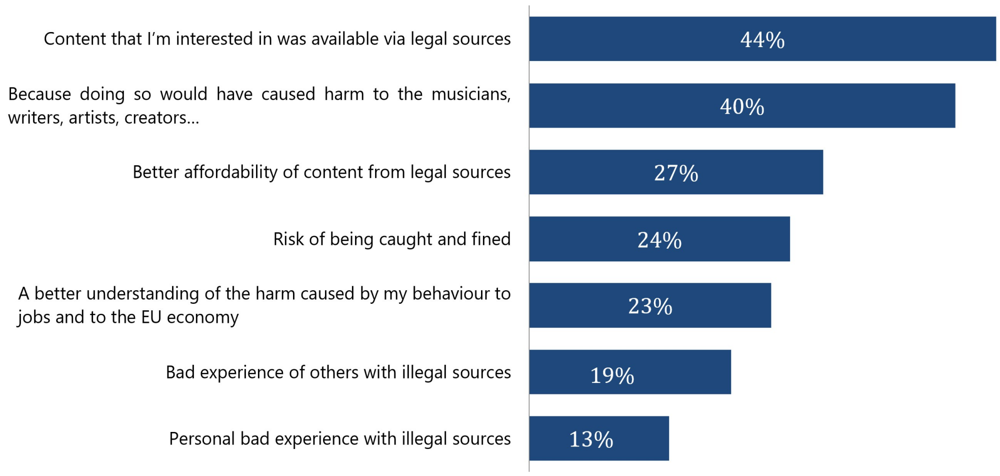
Figure 4.3.1. Reasons to stop using online pirated content among intentional users of illegal sources



Q9a: You indicated that you used illegal sources (websites) intentionally for online content during the past 12 months. What are all the elements that would make you stop using illegal sources? (Total base; n= 3 935)

Conversely, for those who have **not** intentionally used illegal sources in the past 12 months, the main reason for not doing so is because the content they are interested in is available via legal sources (44 %). A slightly smaller group (40 %) says that their refusal to use illegal sources is guided by an awareness of the harm this would cause to content creators. It is considerably less common for people to avoid illegal sources because of bad experiences for themselves or others (13 % and 19 %, respectively), because of the harm it would cause to jobs and the EU economy (23 %), or because they fear being caught or fined (24 %).

Figure 4.3.2. Reasons not to use online pirated content among non-users of illegal sources



Q9b: You indicated that you did NOT use illegal sources (websites) intentionally for online content during the past 12 months. What was the reason for this?
(Total base; n= 21 889)

Reluctance to use illegal sources may also be founded in a fear of exposure to harmful practices such as scams or inappropriate content for minors. More than 8 in 10 Europeans (82 %) agree that obtaining online content illegally entails a risk of such exposure. A clear majority shares this view regardless of whether they have accessed content via illegal sources or not, but agreement is higher among those who have not (85 %) compared to those who have (75 %).

5. Legal sources of online content – Awareness and opinions

Europeans' awareness of legal online offers remains high. Almost 9 in 10 are aware of at least one type of legal offer available in their country, most commonly of films, music, TV series, and books.

Europeans tend to have a clear preference for legally offered online content over content from illegal sources, if the former is reasonably priced. 80 % of consumers totally agree or tend to agree that they prefer to access content through authorised platforms rather than illegally, if it is affordable. Younger Europeans openness to the use of legal offers is slightly below average, but in the 15-24 age group, still 7 in 10 (70 %) prefer legal options over illegal ones if affordable legal offers are available.

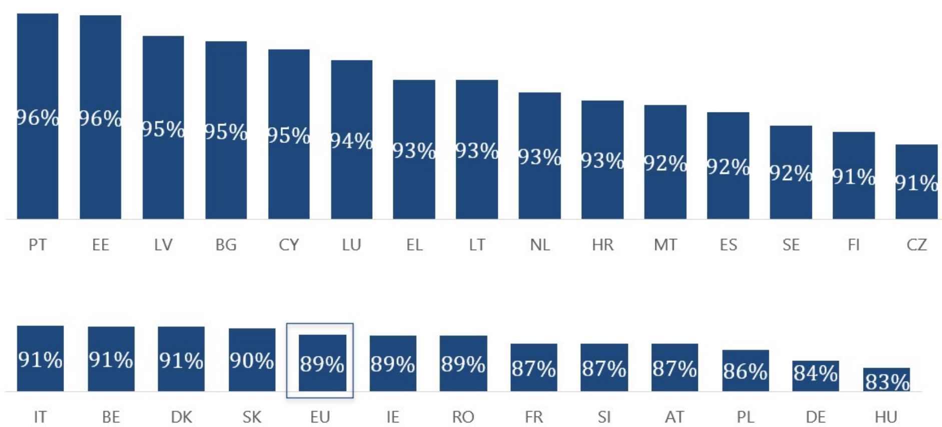
Most Europeans also continue to consider the quality and the diversity of the content offered via genuine sources to be better than that which can be found through illegal solutions. However, 60 % of those who have intentionally accessed online content via pirated sources in the last year do find that it is easier to find and access digital content that they want to see via illegal channels than through legal services.

More than 4 in 10 Europeans (43 %) have paid to access, download or stream copyright protected content from a legal service on the internet over the last 12 months, considerably more than the 14 % of Europeans who admit to having intentionally used illegal sources to access such content.

5.1 Awareness about legal offers

As in the 2020 wave of the survey, awareness of legal online offers remains high among Europeans. At the EU level, almost 9 in 10 (89 %) report knowing of at least one type of legal online offer. These findings are very high for all EU countries, but there are some variations, ranging from 96 % in Portugal and Estonia to 84 % in Germany and 83 % in Hungary.

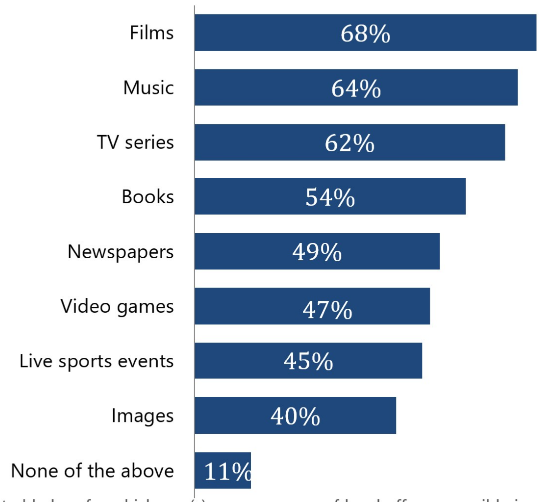
Figure 5.1.1 Awareness of at least one type legal online offer per country



Q6: Among the type of content listed below, for which one(s) are you aware of legal offers accessible in your country to access or download/stream them on the internet? (Total base; n= 25 824) – Awareness of at least one legal offer

The types of content most Europeans know of legal offers for in their country are films (68% of Europeans know a legal offer for this), music (64 %), and TV series (62 %). Slightly more than half (54 %) also know about legal sources for books. Legal offers available for video games, live sports events, and images are less known.

Figure 5.1.2 Awareness of legal offers



Q6: Among the type of content listed below, for which one(s) are you aware of legal offers accessible in your country to access or download/stream them on the internet? (Total base; n= 25 824)

Younger Europeans are most likely to know at least one type of legal offer for the surveyed content types. In the 15-43 age group, this goes for 93 %. In contrast, in the 55-65 and 65+ age groups, this falls to 86 % and 83 %, respectively. Europeans aged 65 or older, however, are most often familiar with legal offers of newspapers (54 %, compared to the average of 49 %), whereas those aged between 15 and 24 are least familiar with such offers (39 %).

Awareness of legal offers also varies depending on Europeans' online behaviour. When compared to the average, Europeans who admit to intentionally accessing content from illegal sources are less likely to be aware of legal offers for almost all the types of content included in the survey. The main exception are legal offers of video games, of which intentional users of illegal sources are more often aware than average (53 % versus 46 %).

5.2 Opinions about legal offers

In line with the 2020 results, 8 in 10 consumers (80 %) totally agree or tend to agree that they prefer to choose legal sources when these options are affordable. Similarly, for users of online pirated sources, reasonably priced legitimate options are preferred over unlawful ones (73 % mention this).

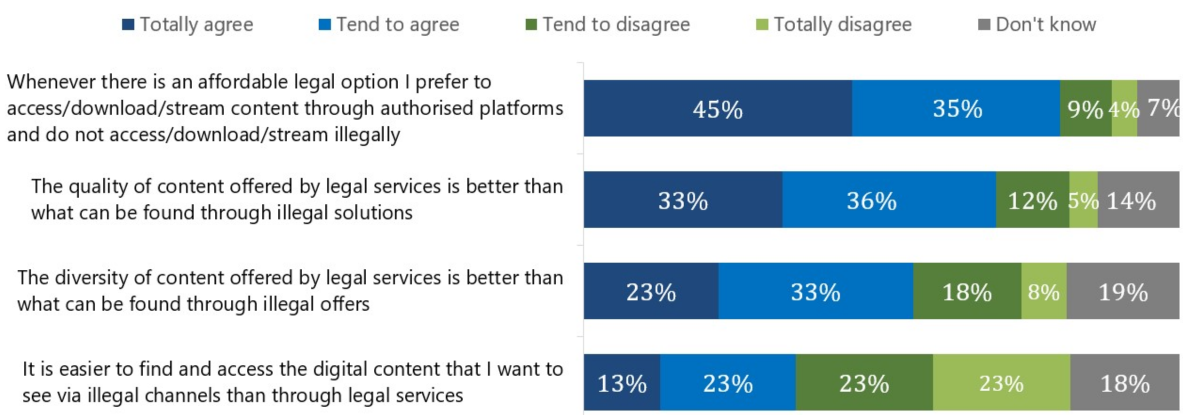
Enthusiasm about legal offers is somewhat lower among younger people, but in the 15-24 age group, still 7 in 10 (70 %) prefer affordable legal options over illegal ones, if the former are available.

Respondents are also positive about the quality and the diversity of content offered by legal sources. Almost 7 in 10 European (69 %) consider the quality of the content offered via genuine sources to be better than that which can be found through illegal solutions.

Opinions are somewhat more mixed when it comes to the diversity of offers in legal versus illegal sources, however, with just over half (55 %) saying that the diversity offered via legal services is superior to the one offered via unauthorised ones.

Around two in three Europeans (36 %) agree that it is easier to find content via illegal sources than via legal ones. This figure rises to 45 % among Europeans aged between 15 and 24, and to 60 % among Europeans who have intentionally accessed online content via illegal sources in the past 12 months.

Figure 5.2.1 Attitudes towards legal offers

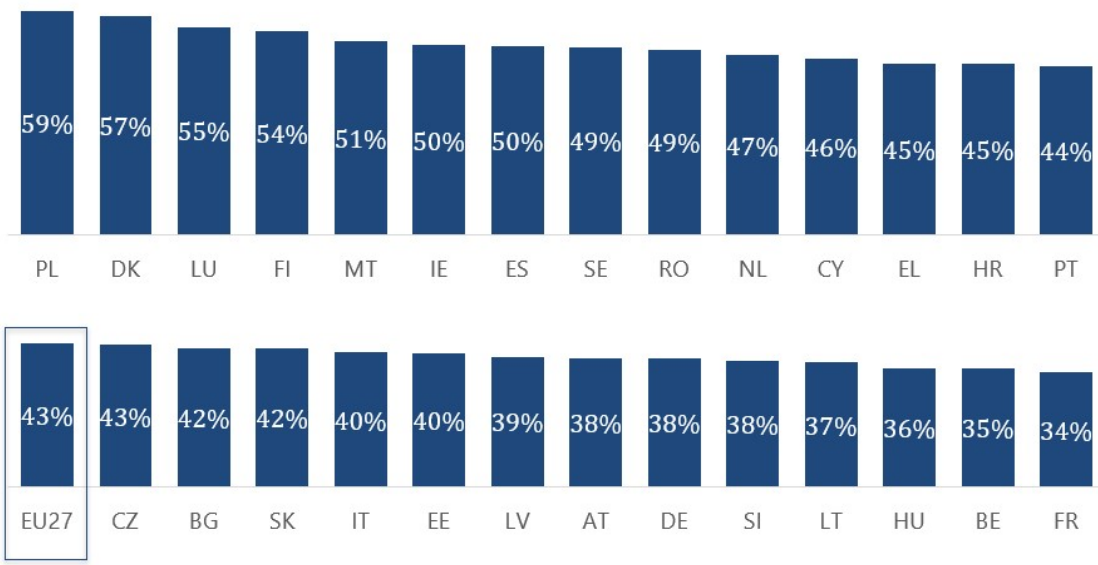


Q7: To what extent do you agree or disagree with the following statements ? (Total base; n= 25 824)

Reflecting the generally positive attitude towards legal offers, paying for online content from legal sources is a common practice among Europeans. The findings show that more than 4 in 10 (43 %) have paid to access legal services on the internet or from Pay TV operators. Results vary by country, ranging from 59 % in Poland to 34 % in France. As shown in Figure 5.2.2, there are six other EU

Member States besides Poland in which at least half of the population has paid for legal access to online content in the past year: Denmark, Luxembourg, Finland, Malta, Ireland and Spain.

Figure 5.2.2 Paid to access, download or stream content from a legal service by country



Paying to access content legally is more common among younger Europeans than older ones. It is most common in the 25-34 age group, but considerably less so among Europeans aged between 55 and 64 (38 %) and those aged 64 or over (29 %).

Education level also seems to be associated with people’s use of paid sources. Europeans with a high level of education are more likely than Europeans with a middle or low level of education to have paid to access online content in the last 12 months (47 %, 41 % and 35 %, respectively).

6. Conclusion

6.1 Intellectual property – Awareness and perceptions

A clear majority of Europeans report a good understanding of the concept of IP, and there is a clear consensus on the importance of respecting IP to protect the rights and income of producers of goods and content, as well as the quality of their products.

More than 8 in 10 European (83 %) say that they have a rather good or very good understanding of the term of intellectual property. This figure is above 80 % regardless of people's behaviour (i.e. whether or not they have engaged in buying counterfeit products or accessing online content from illegal sources), and there are no important differences between these two groups.

The vast majority of Europeans strongly agree on the value of respecting IP. More than 9 in 10 (93 %) agree that it is important that inventors, publishers, creators and performing artists can protect their rights and be paid for their work. Likewise, most (91 %) find that respecting IP is important to keep others from inappropriately claiming to be the creator of a piece of art or the inventor of something when this is not the case.

While awareness of the importance of IP protection is high, fewer Europeans think that consumers like themselves are the main beneficiaries of this protection (8 %). Conversely, more than half consider performing artists such as musicians (54 %), and creators of artistic content (52 %) to be the groups that benefit the most from this protection. Notably, people are much more likely to think that big companies benefit from IP protection than small and medium companies (SMEs): while 24 % say big companies are the main beneficiaries of IP protection, only 7 % think this is the case for SMEs.

6.2 Counterfeit goods – Behaviours and drivers of consumption

Overall, Europeans are aware of the negative impacts of counterfeit goods and mostly reject justification for purchasing such goods. Younger people, however, tend to be more open to this practice, especially for financial reasons.

Most commonly, Europeans think that buying counterfeits supports unethical behaviour (83 %) and criminal organisations (80 %). A majority also believes that it has a detrimental economic impact, by ruining business and jobs (79 %). While it is somewhat less common to consider the purchase of counterfeit goods as a threat to health and safety and to the environment, still around two thirds also agree with this (66 % and 62 %, respectively).

The percentage of Europeans who admit to intentionally buying counterfeit goods remains low at 13 %. However, this result is twice the EU average for the youngest group of respondents, aged between 15 and 25, as 26 % of them report having bought counterfeits in the past 12 months. These figures are higher than in previous waves of the survey, but this can be explained by the change in mode of the survey from telephone to online. In the absence of an interviewer, the social desirability bias is overcome, and respondents are prone to answer more honestly.

It should be held in mind that the above only tells us something about the **admitted** and **intentional** buying of counterfeits. The findings suggest that the actual proportion of people who buy counterfeits is higher than reported above, as people are misled into buying counterfeits or are unsure about whether the products they have bought are genuine or not. In the current survey, 39 % of Europeans have wondered whether something they have bought is a genuine product or a counterfeit, and more than 1 in 10 (15 %) report buying counterfeits as a result of being misled.

A lower price, better quality and larger offer of original products are important drivers for counterfeit buyers to cease buying these products. Considerations of harm to others (such as the economy or producers) have a smaller impact but are more important to younger counterfeit buyers than to older ones. Although not directly comparable due to the change in methodology from telephone interview to an online survey, a better affordability of original products remains the most often mentioned reason to stop buying counterfeits, with around 4 in 10 European (43 %) reporting this. To a lesser extent, a larger or better offer of original products would make buyers of counterfeits stop doing so, with a quarter (25 %) reporting this.

6.3 Online pirated content – Opinions and consumption

Overall, Europeans are opposed to the use of online pirated content, and are aware of its risks, but slightly more than a third (34 %) agree that it is acceptable to obtain content illegally from the internet or from apps when it is for their personal use.

Only a minority of Europeans (14 %) admit to having intentionally used illegal sources to access online content, and only 12 % have done this specifically to watch sports. However, as in previous waves of the survey, among the younger age groups, the proportion using online pirated content is significantly higher than average. Of those aged 15 to 24 years old, 33 % report using illegal online sources intentionally, and 27 % say that they have streamed content from illegal sources to watch sports (more than double the EU average).

Acceptance of the reasons that could justify this behaviour also remain higher amongst younger Europeans than older ones. While only 19 % of Europeans aged 55-64, and 18 % of those aged 65 or over, agree that content can be accessed via illegal sources if the price of the content is too high, acceptance of this increases to 41 % and 46 % among those aged 25-34 and 15-24, respectively.

Compared to the use of online pirated content, sharing protected content with others is slightly less widespread. Only 11 % of Europeans report uploading copyrighted content in order to share it with others. This includes 42 % of those who have also accessed online content from illegal sources themselves. As before, this behaviour tends to be more common among youngsters. A quarter (25 %) of respondents aged between 15 and 24 have uploaded content to share it with other online users.

Both the price and the quality of the content available via legal sources play a role in motivating users of illegal sources to stop doing so. Amongst consumers that report having accessed online content from illegal sources intentionally, the main reasons that would make them stop using these sources would be better affordability of content from legal ones (43 %), and if more content that interested them was available via legal sources (37 %).

Conversely, respondents that report not having used illegal sources intentionally in the past months, mention that the main reason for not doing so is because the content they are interested in was available via legal sources (44 %). In addition, 40 % report not engaging in this behaviour because of the harm this would have caused to the content creators.

6.4 Legal sources of online content - Awareness, opinions and consumption

Awareness of legal online offers remains high among Europeans. Almost 9 in 10 are aware of at least one type of legal content offer available in their country, most commonly of films (68 % are aware of such offers), music (64 %), TV series (62 %), and books (54 %). Legal offers of video games, live sports events and images are less commonly known.

In line with the 2020 results, the survey shows that Europeans tend to be very open to the use of legal offers. 80 % of Europeans say that they prefer to use legal sources to access online content instead of going for an illegal alternative, if an affordable legal option is available. Additionally, almost 7 in 10 (69%) consider the quality and the diversity of the content offered via genuine sources to be better than that which can be found through illegal solutions.

Consistent with these findings, more than 4 in 10 European (43 %) have paid to access online content from a legal service in the past 12 months, while considerably fewer (14 %) admit to having intentionally used illegal sources to access such content. Notably, of those who say they have accessed content via illegal sources, 6 in 10 have also used paid legal sources in the past year, indicating that only a minority relies solely on illegal sources.

Annex 1: Questionnaire

V. MAIN QUESTIONNAIRE

Base: All respondents

Content_use [SCRIPTER: MULTIPLE ANSWER, RANDOMISE OPTIONS 1-7 + 10]

During the past 3 months, which of the following have you done?

Streaming: playing digital content (e.g., a film or music) directly from the internet without saving it on your device (e.g., your computer or smartphone).

Downloading: saving digital content from the internet on your device.

1. Streamed or downloaded music or audio books
2. Streamed or downloaded films or TV series
3. Streamed live sports events
4. Downloaded e-books or read e-books online
5. Read newspapers and magazines online
6. Downloaded images
7. Streamed or downloaded video games (This also includes app games to be played on tablet or smartphone)

10. Downloaded apps giving access to sports events, TV and video

8. None of the above

9. Don't know

Base: All respondents

Q1 [SINGLE ANSWER]

Personally, would you say that you have a very good, rather good, rather poor or very poor understanding of the meaning of the term 'intellectual property'?

1. Very good
2. Rather good
3. Rather poor
4. Very poor

Base: All respondents

Q2 [MULTICODE, MAX 3, RANDOMISE OPTION 1-11]

Intellectual property is a set of principles and rules that enable inventors, performers, artists and authors to protect the rights they have over their creation and receive reward.

In your opinion, who benefits the most from the protection of intellectual property? Please select maximum 3.

1. Consumers like yourself
2. Big companies
3. Small and medium companies
4. Performing artists (such as musicians, singers, actors)
6. Inventors
7. Creators of artistic content (such as photographers, sculptors, painters, authors, writers, filmmakers)
8. Publishers/producers of creative content made by others
9. Website, app and video game developers
11. App stores

Base: All respondents

Q3. [SINGLE PROGRESSIVE GRID]

For the next set of questions please consider the following definitions:

Counterfeit products are fakes or unauthorised replicas of the original product, usually illegally marked with logos and brands belonging to the company that sells the original.

Illegal downloading or streaming means accessing copyrighted content (for example music, films or sports events) that is made available to download or stream (for instance via a website, an app or a download tool) without the authorisation of the owner of the copyright.

To what extent do you agree or disagree with the following statements ?

Rows [RANDOMISE]

1. It is acceptable to purchase counterfeit products when the price for the original product is too high
2. It is acceptable to buy counterfeit products when the original product is not or not yet available
3. It is acceptable to buy counterfeit products when the quality of the product does not matter
4. It is acceptable to buy counterfeit products when it concerns luxury products
5. It is acceptable to obtain content illegally from the internet or from apps when it saves me money
6. It is acceptable to obtain digital content illegally from the internet or from apps when it is for my personal use
13. It is acceptable to obtain content illegally from the internet or from apps when the price for the protected content is too high
16. It is acceptable to buy counterfeit products because everybody does it
17.It is acceptable to obtain content illegally from the internet or from apps when this content is not available on my streaming subscription

Columns
1. Totally agree
2. Tend to agree
3. Tend to disagree
4. Totally disagree

Base: All respondents
Q3b. [SINGLE PROGRESSIVE GRID]
To what extent do you agree or disagree with the following statements ?

Rows [RANDOMISE]
1. Buying counterfeit products ruins businesses and jobs
2. Buying counterfeit products supports criminal organisations
3. Buying counterfeit products supports unethical behaviour
4. Buying counterfeit products poses a threat to health and safety
5. Buying counterfeit products is an act of protest and a way to resist to the market driven economy (and its impacts on society) and the large premium brands
6. Obtaining illegally protected content online such as music, video, film or TV series exposes you to harmful practices such as scams, computer viruses, loss of your credentials, ransomware, or inappropriate content for minors
7. Buying counterfeit products has a harmful impact on the environment

Columns

1. Totally agree
2. Tend to agree
3. Tend to disagree
4. Totally disagree

Base: All respondents

Q4a [SINGLE PROGRESSIVE GRID]

During the past 12 months, which of the following have you done?

Rows [RANDOMISE]

1. Bought counterfeit products intentionally (meaning that you knew the product you bought was fake)
2. Bought counterfeit products as a result of being misled
3. Wondered if a product you bought was genuine or counterfeit

Columns

1. Yes
2. No

Base: All respondents

Q4b [SINGLE PROGRESSIVE GRID]

During the past 12 months, which of the following have you done?

Rows [RANDOMISE]

1. Accessed or downloaded or streamed content from illegal online sources intentionally
2. Paid to access, download or stream copyright protected content from a legal service on the internet or from Pay TV operators (for instance music, video, film or TV series, e-books or audio books)
3. Uploaded copyright protected content on the internet (music, video, film or TV series) in order to share it with other internet users
4. Wondered if a source where you could access/download or stream music or videos was legal or not
5. Researched to check if a source where you could access/download or stream music or videos was legal or not

6. Accessed online content using illicit streaming devices, such as set-top boxes with preinstalled apps or downloaded apps to access pirated content
7. Accessed or streamed content from illegal online sources intentionally to watch sports

Columns
1. Yes
2. No

Base: IF Q4b=1 for items 1,6,7
Q4c [MULTICODE]
Through which of the following channels have you intentionally accessed content provided by illegal sources?
Please indicate all that apply.

1. IPTV services
2. Social media/Messaging tools
3. Dedicated websites
4. P2P networks
5. Apps
9. Don't know [SCRIPTER: SINGLE ANSWER]

Base: All respondents
Q5 [SINGLE PROGRESSIVE GRID]
To what extent do you agree or disagree with the following statements ?

Rows [RANDOMISE]
1. Respecting Intellectual Property is important so no one can claim being the creator of a piece of art or the inventor of something when in reality this is not the case
2. Respecting Intellectual Property is important because it contributes to improving and guaranteeing the quality of products and services
4. It is important that inventors, publishers, creators and performing artists could protect their rights and be paid for their work

5. Companies that create a lot of Intellectual Property (that hold patents, trade marks, designs, copyrights, trade secrets) contribute significantly more than the others to the creation of jobs or growth
6. Strict protection of Intellectual Property may curb innovation

Columns
1. Totally agree
2. Tend to agree
3. Tend to disagree
4. Totally disagree

Base: All respondents
Q6 [MULTIPLE ANSWER, RANDOMISE OPTIONS 1-8]
Among the type of content listed below, for which one(s) are you aware of legal offers accessible in your country to access or download/stream them on the internet?
Please select all that apply.

1. Music (This also includes audio books and podcasts)
2. Films
3. TV series
4. Live sports events
5. Books (This also includes E-books and audiobooks)
6. Newspapers (This also includes E-newspapers and magazines)
7. Images
8. Video games (This also includes app games to be played on tablet or smartphone)
9. None of the above

Base: All respondents
Q7 [SINGLE PROGRESSIVE GRID]
To what extent do you agree or disagree with the following statements ?

Rows [RANDOMISE]
1. The quality of content offered by legal services is better than what can be found through illegal solutions

2. The diversity of content offered by legal services is better than what can be found through illegal offers
3. Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms and do not access/download/stream illegally
4. It is easier to find and access the digital content that I want to see via illegal channels than through legal services

Columns
1. Totally agree
2. Tend to agree
3. Tend to disagree
4. Totally disagree
9. Don't know

Base: IF Q4a_1=1
Q8a [MULTIPLE ANSWER, RANDOMISE OPTIONS 1-7 + 10-14]
You indicated that you have intentionally bought counterfeit products during the past 12 months. What are all the elements that would make you stop buying counterfeit products? *Please select all that apply.*

1. Risk of being caught and fined
2. Personal bad experience with the quality of a counterfeit product
3. Bad experience of others with a counterfeit product
4. Harm to my image: others would judge me because of having or wearing counterfeit items
6. A better understanding of the harm caused by my behaviour to jobs and to the EU economy
7. A better understanding of the harm caused by my behaviour to the producers of the original products
10. Larger and/or better offer of original products
11. If the price of the original product was affordable to me
12. Risk of exposing myself to the safety or health risks of a counterfeit product
13. A better understanding of the harm caused by my behaviour to the environment
14. A better understanding of how buying counterfeit products supports criminal organisations
8. Nothing would make me stop **[SINGLE ANSWER]**

Base: IF Q4a_1=2

Q8b [MULTIPLE ANSWER, RANDOMISE OPTIONS 1-7 + 10-14]

You indicated that you have NOT intentionally bought counterfeit products during the past 12 months. What was the reason for this? Please indicate all that apply.

1. Risk of being caught and fined
2. Personal bad experience with the quality of a counterfeit product
3. Bad experience of others with a counterfeit product
4. Harm to my image: others would judge me because of having or wearing counterfeit items
6. Understanding of the harm caused by my behaviour to jobs and to the EU economy
7. Understanding of the harm caused by my behaviour to the producers of the original products
10. Larger and/or better offer of original products
11. Risk of exposing myself to the safety or health risks of a counterfeit product
12. The price of the original product was affordable to me
13. Understanding of the harm caused by my behaviour to the environment
14. Understanding of how buying counterfeit products supports criminal organisations

Base: IF Q4b_1=1

Q9a [MULTIPLE ANSWER, RANDOMISE OPTIONS 1-6 + 8]

You indicated that you used illegal sources (websites) intentionally for online content during the past 12 months.

What are all the elements that would make you stop using illegal sources? Please indicate all that apply.

1.Risk of being caught and fined
2.Personal bad experience with illegal sources (e.g. malware, loss of my credentials, cyber risk, ransomware, credit card fraud, hacking)
3.Bad experience of others with illegal sources (e.g. malware, loss of my credentials, cyber risk, ransomware, credit card fraud, hacking)
4. Better affordability of content from legal sources
5. A better understanding of the harm caused by my behaviour to the musicians, writers, artists, creators…
6. A better understanding of the harm caused by my behaviour to jobs and to the EU economy
8. If more content that I'm interested in would be available via legal sources

7. Nothing would make me stop **[SINGLE ANSWER]**

Base: IF Q4b_1=2

Q9b [MULTIPLE ANSWER, RANDOMISE OPTIONS 1-6 + 8]

You indicated that you did NOT use illegal sources (websites) intentionally for online content during the past 12 months.

What was the reason for this? Please indicate all that apply.

1. Risk of being caught and fined
2. Personal bad experience with illegal sources (e.g. malware, ransomware, loss of credentials, credit card fraud, hacking)
3. Bad experience of others with illegal sources (e.g. malware, ransomware, loss of credentials, credit card fraud, hacking)
4. Better affordability of content from legal sources
5. Because doing so would have caused harm to the musicians, writers, artists, creators...
6. A better understanding of the harm caused by my behaviour to jobs and to the EU economy
8. Content that I’m interested in was available via legal sources

VI. FINAL SOCIO-DEMOGRAPHIC QUESTIONS

Base: all respondents

D10 [SINGLE ANSWER]

What is the highest level of school you have completed, or the highest degree you have received?

998. Don't know

999. Prefer not to answer

Base: all respondents

D11.

What is your current occupation?

1. Student
2. Working full time
3. Working part time
4. Unemployed
5. Retired
6. Looking for a job
7. Housewife/houseman
98. Other

Base: all respondents

D8 [SINGLE ANSWER]

Would you say that you live in….?

1. Rural area or village
2. Small or middle-sized town
3. Large town

Base: all respondents

D9 [Q, MIN 1, MAX 15]

How many people aged 15 and older usually live in your household? Please include yourself.

SCRIPTER: Calculate hidden variable recodeD9_1:

- 1
- 2
- 3
- 4+

Annex 2: Literature review studies

Name of the study (year of release)	Author/Organisation	Study coverage
Online copyright infringement tracker (10th Wave - March 2021)	UK Intellectual Property Office (IPO)	National (UK)
Hub's privacy and piracy survey (2020)	Hub Research	National (US)
Piracy during the pandemic survey (2020)	Digital Citizens Alliance Survey	National (US)
Online copyright infringement in the European Union. Music, films and TV (2017-2020), trends and drivers (2021)	EUIPO	EU
Baromètre de la consommation de biens culturels dématérialisés (Barometer of the	Hadopi	National (France)

consumption of cultural immaterial goods)		
Counterfeits goods research – wave 2 (2021)	UK Intellectual Property Office (IPO)	National (UK)
Social media influencers and counterfeit goods (2021)	UK IPO	National (UK)
Online copyright infringement tracker (10th wave)	UK IPO	National (UK)
European Citizens and Intellectual Property: perception, awareness and behaviour (2020)	EUIPO	EU
'Can scholarly pirate libraries bridge the knowledge access gap? An empirical study on the structural conditions of book piracy in global and European academia' (Bodó B, Antal D, Puha Z (2020))	Bodó B, Antal D, Puha Z (2020)	Worldwide and European models (IP geolocation data analysis)
Online copyright infringement in the European Union. Title-level study: film, music and TV (2020)	EUIPO	EU
Social media discussion paper: New and existing trends in using social media for IP infringement activities and good	EUIPO	EU - Literature review

practices to address them (2021)		
Monitoring and analysing social media in relation to IP infringement (2021)	EUIPO	EU – Social media analytics and data mining in 6 EU countries
Vendor accounts on third party trading platforms (2021)	EUIPO	EU – desk-based research, comparative legal analysis and qualitative interviews
Misuse of e-commerce for trade in counterfeits (2021)	OECD and EUIPO	OECD countries – statistical data on counterfeiting and piracy
Global trade in fakes (2021)	OECD and EUIPO	OECD countries
Risks and damages posed by IPR infringement in Europe – Awareness campaign (2021)	EUIPO	EU – literature review
Intellectual Property Youth Scoreboard	EUIPO	EU – literature review
Online copyright infringements tracker survey (12th wave)	UK IPO	National (UK)
Survey on Public Awareness of Intellectual property Right Protection 2022	IPD	National (Hong Kong)
What proportion of consumers are pirating content	YouGov	Worldwide (18 countries)
Piracy in times of Covid	Martinelli, A. et al	Worldwide (14 countries)
Television piracy study 2022/2023	Vaunet	National (Germany)

IPO counterfeit goods research	UK IPO	National UK

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EUROPEAN CITIZENS AND INTELLECTUAL PROPERTY: PERCEPTION, AWARENESS, AND BEHAVIOUR

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