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EUROPEAN CITIZENS AND INTELLECTUAL PROPERTY: PERCEPTION, AWARENESS, AND BEHAVIOUR – 2020

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EUROPEAN CITIZENS AND INTELLECTUAL PROPERTY:
PERCEPTION, AWARENESS, AND BEHAVIOUR 2020

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COUNTRY CODES

BE	Belgium	LT	Lithuania
BG	Bulgaria	LU	Luxembourg
CZ	Czechia	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	Netherlands
EE	Estonia	AT	Austria
IE	Ireland	PL	Poland
EL	Greece	PT	Portugal
ES	Spain	RO	Romania
FR	France	SI	Slovenia
HR	Croatia	SK	Slovakia
IT	Italy	FI	Finland
CY	Cyprus	SE	Sweden
LV	Latvia		

FOREWORD

This updated major study of how IP rights are perceived by EU citizens is a unique roadmap for all the EU countries when it comes to counterfeiting and piracy attitudes and behaviours.

Now in its third edition, it shows a gradual but encouraging change in understanding and attitudes, following the previous surveys by the EUIPO in 2013 and 2017.

As in the previous editions, this EU-wide study confirms that the vast majority of citizens agree that it is important that those who invest time and money in innovation have their rights protected and are paid for their work.

This time, there is a particularly large increase in respect for artists and creators. In addition, people are gradually saying that they have a better understanding of IP rights, which is an important finding, given the evidence that those who understand these rights are less likely to deliberately infringe them.

There has been a slight drop from 7% to 5% for intentional purchase of counterfeits and from 10% to 8% for intentional piracy. Young people continue to be the biggest group that buy counterfeits and download illegally, showing there is more work to be done here, especially since this group comprise the heaviest users of the internet. At the same time the trend to perceive the purchase of counterfeits as harmful to people’s image continues to rise – up from 12% to 17% in the current study.

While the study does not enter into why counterfeits are now perceived more negatively, this trend is likely to be reinforced by the public backlash against fake medicines and personal protective equipment during the Covid-19 crisis.

As regards downloads, people are now more willing to pay for legal content particularly if it is made available at a reasonable price. Part of this change may be linked to the increase in availability of legal sources. People are paying more for legal content as the quality and diversity improves. They are also checking more frequently whether the sites they use are legal or not.

These changes, and the reasons behind them, deserve to be closely studied and this updated report will continue to be an important resource for researchers, IP professionals and policymakers alike.

The details will help stakeholders at the national level to combat IP crime and provide a benchmark shaping future public awareness strategies for the EUIPO and in the EU generally.

EXECUTIVE SUMMARY

This report presents the findings of the 2020 study on 'European Citizens and Intellectual Property: Perception, Awareness and Behaviour' (2020 IP Perception study). The overarching aim of this study is to gather knowledge on Europeans' 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 at national level.

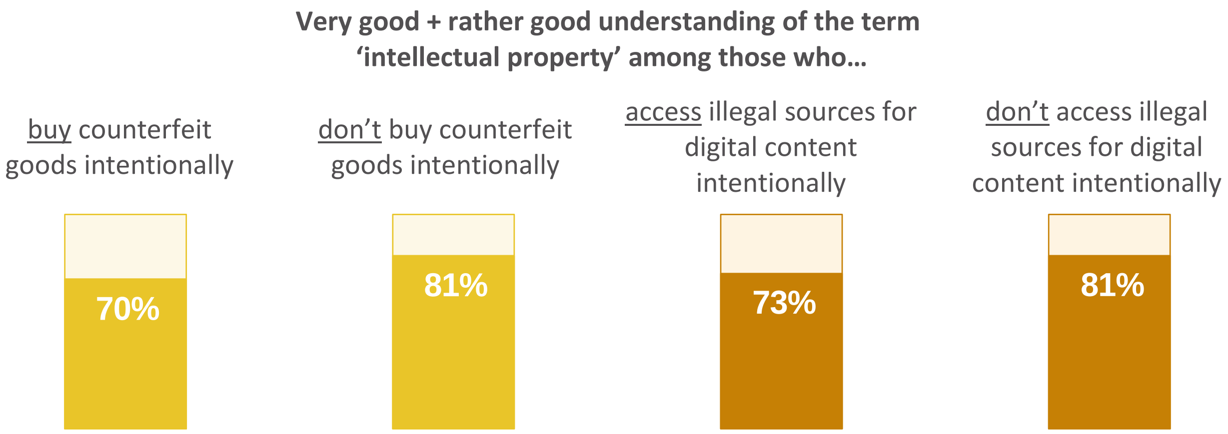
In total, 25 636 interviews were conducted with EU residents aged 15 and above. The questionnaire was largely similar to the previous study to allow for comparable results. Modifications were integrated into the questionnaire to further explore relationships between perception and behaviour.

Understanding of the concept of intellectual property is high. Those who do not infringe IP rights are more likely to have a very/rather good understanding of the concept than those who engage in behaviours that infringe IP.

Subjective understanding of the concept of 'intellectual property' remains high at 80 % (+ 2 percentage points (pp) in comparison with the 2017 study), though it varied substantially across countries. As in the previous two studies, the youngest respondents show the least subjective understanding of IP in comparison to the older age groups (71 %).

Awareness of IP is considerably below average among those who intentionally bought counterfeit goods (70 %) or accessed pirated online content (73 %), suggesting that that those with a low understanding of IP are more likely to infringe it.

Understanding the concept of intellectual property and infringing it



It is almost universal that those in Europe recognise the value of protecting IP, as was the case in 2017, though few see the benefit being for people like themselves. Whilst protecting IP may be seen as something mostly beneficial to famous performing artists and big companies, there has been a doubling of those who believe that protecting IP is most beneficial for the creators of artistic content.

The value of protecting IP is recognised across Europe. The consensus (98 %) is that it is important that inventors, creators and artists are able to protect their rights and be paid for their work, as was the case in the previous study (97 %). Similarly, the view of the role of IP in economic stability remains stable with 73 % agreeing that if there was no longer any IP protection, there would be economic chaos.

While perception of the value of protecting IP may be high, few Europeans (4 %) believe that IP mainly benefits people like themselves. Many still believe that IP mainly benefits the 'elite', such as famous artists and big companies – though the perception of big companies benefiting has dropped 9 percentage points since the last study.

Furthermore, the proportion of Europeans who think that IP is most beneficial to creators of artistic content has doubled, from 10 % in 2017 to 20 % in 2020, although it should be stressed that two more categories were added to this question item in 2020 ('authors/writers' and 'filmmakers'). Almost no one felt that nobody benefits from IP (2 %).

Who benefits the most from IP protection? [1]

Famous performing artists	**21 % (0)**
Creators of artistic content	**20 % (+10)**
Big companies	**15 % (-9)**
Consumers like yourself	**4 % (-1)**

The majority believe that counterfeits have a negative effect on the economy in terms of business and jobs.

Europeans tend to be aware of the negative effects of counterfeit goods on the economy and health and safety. The economic argument against buying counterfeits continues to hold the most weight – 83 % in 2020 agree that buying counterfeit goods ruins businesses and jobs.

There is a continued rejection of justifications that would make the purchase of counterfeit goods acceptable.

As was the case in 2017, most Europeans do not agree with the arguments justifying the purchase of counterfeit goods. Only a small minority of EU citizens see valid reasons for buying counterfeit goods. For example, just 15 % of Europeans 'totally' or 'tend to' agree that it is acceptable to buy counterfeit luxury products. This disapproval of purchasing counterfeit goods has increased somewhat since the last study.

However, disapproval of purchasing counterfeits is not the same among all demographics. Young people (under 24 years old) are more likely to agree with justifications for purchasing counterfeit goods. 30 % of these young people 'agree/tend to agree' that it is acceptable to buy counterfeit luxury products – double the average EU population. 37 % of this demographic believe it is acceptable to purchase counterfeits when the price of the original product is too high, compared to 24 % of all the people surveyed.

([1]) Source: Q2: In your opinion, who benefits the most from the protection of intellectual property? (Total base; n= 25 636). TREND QUESTION.

Few admit to intentionally purchasing counterfeit goods, in line with the 2013 findings. Those who have purchased counterfeits, are far more likely to agree with statements that justify it as acceptable.

The declared purchase of counterfeit goods is low. The proportion of Europeans who admit to having intentionally purchased counterfeit goods during the last 12 months has declined slightly, from 7 % in 2017, to 5 % in 2020, bringing it more in line with the figure observed in 2013 (4 %).

As was the case in the previous study, younger people are more likely to admit having purchased counterfeits intentionally – 10 % of those aged between 15 and 24 admitted this – double the European average. Buying counterfeits and accessing pirated online content are related, with 30 % of those who intentionally accessed pirated content online having purchased counterfeit goods.

Bought counterfeit products intentionally [2]

Those who admit to intentionally purchasing counterfeits are likely to indicate that this can be justified. Two thirds (64 %) of those who say they bought counterfeits intentionally, feel that it is acceptable to do so when the price of the original and authentic product is too high. Only slightly fewer (58 %) of those who bought counterfeits intentionally feel it is acceptable to do so when the original product is not (or not yet) available where they live.

Consistent with the last study, a sizeable minority have wondered whether something they have bought was a genuine product or a counterfeit. Purchase of counterfeits as a result of being misled also remains low.

A third of Europeans (33 %) have wondered during the last 12 months whether a product they bought was original or not, down from 37 % in 2017. About 1 out of 10 (9 %) were misled into buying counterfeits during the previous year, a figure that has remained more or less stable since 2017 (- 1pp). There is an observable over-representation of young people among those who bought counterfeits because they were misled – 12 % compared to the 9 % average.

([2]) Source: Q4a: During the past 12 months, which of the following have you done? - Bought counterfeit products intentionally (Total base; n= 25 636). TREND QUESTION.

Cost matters but has declined in importance as a reason to stop buying counterfeits. Reputational damage is a bigger deterrent compared to the previous study.

The availability of affordable genuine products remains the main reason that would make consumers of counterfeit goods stop this habit; about half (52 %) of those buying counterfeits say this would make them stop. Compared to 2017, the availability of affordable products is now, in absolute terms, less of an important driver for stopping people's purchase of counterfeit goods (- 10pp), although it is still the most important one. This is the case across socio-demographic groups. The risk of punishment is an important driver for young people to stop buying counterfeits, with 46 % of those aged between 15 and 24 who bought counterfeits reporting this.

Reputational damage is more compelling compared to 2017, as more respondents (17 %; + 5pp) who have intentionally purchased counterfeits, state that harm to their image would stop them purchasing counterfeits.

Affordability is also a reason behind the decision not to purchase counterfeits. However, those who do not intentionally buy counterfeit goods are more driven by their understanding of the harm caused to producers, jobs and the economy compared to those who have bought counterfeits.

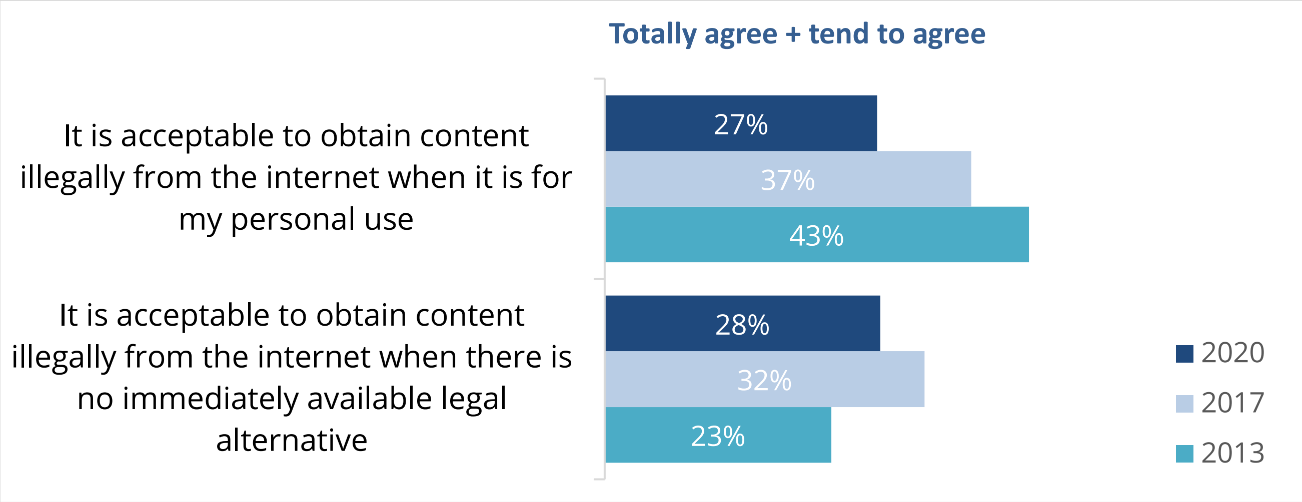
In the current survey, for the first time, those who replied that they did not buy counterfeit goods intentionally during the last 12 months were asked about their main reasons for not doing so. The availability of affordable original products is their main reason for not buying counterfeits. However, compared to those who did buy counterfeits intentionally, those who did not, are significantly more likely to have not done so because of their understanding of the harm caused to producers, jobs and the economy – respectively 48 % and 41 % of those not buying counterfeits mentioned these to be key reasons, compared to 24 % of those buying counterfeits. This suggests that awareness of the negative effects is related to the buying (or not) of counterfeit goods.

Having had a bad personal experience with buying counterfeits seems to have an impact on young people. Young people who did **not** buy counterfeit goods intentionally in the past 12 months, usually avoided counterfeits because they had had a bad personal experience buying them in the past – 31 % of those aged between 15 and 24 reported this, compared to 23 % of all respondents. At the same time, younger respondents are less likely to mention not buying counterfeits because of their understanding of the harm caused to producers, jobs and the economy (42 % and 34 % of those aged between 15 and 24 mention this as the key driver for not buying counterfeits).

Acceptance of using illegal sources to access digital content for personal use is falling dramatically, whilst the percentage that believe it is acceptable if there is no legal alternative remains steady.

Accessing pirated online content is less and less acceptable. Following a small decrease in 2017, this study sees an overall decline of 15 percentage points since 2013 in the proportion of people in the EU that believe it is acceptable to obtain online content illegally if it is for personal use. At the same time, 28 % state that obtaining online content via illegal sources is acceptable if there is no legal alternative available.

Attitude towards pirated online content ([3])



No matter the type of online content, awareness of legal offers is significantly higher in 2020 compared to 3 years ago.

More than two-thirds of those in Europe are aware of the availability of legal offers for three categories of online content: films, music and TV series. Younger demographics are the most aware of legal offers for music, films, TV series and video games.

The preference to choose legal sources continues to grow when those legal options are affordable. Furthermore, both the quality and diversity of content offered on legal services is increasingly viewed as being superior to that found on illegal sources.

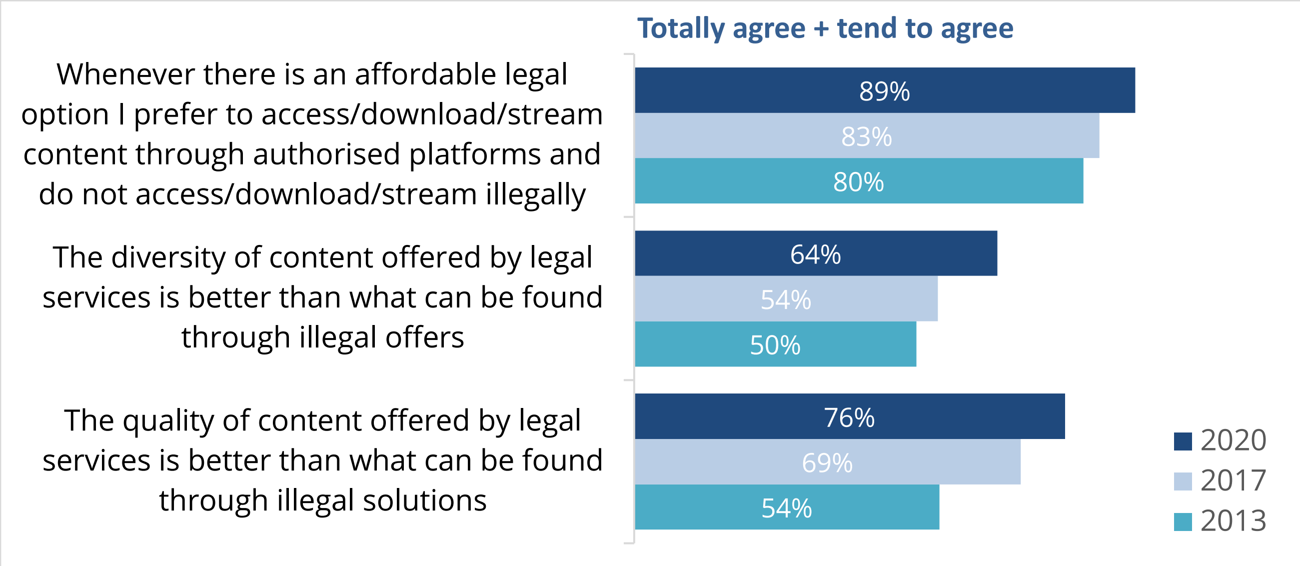
Europeans have a clear preference for legal online content, if reasonably priced. The clear majority (89 %) 'totally agree' or 'tend to agree' with the statement 'Whenever there is an affordable legal option, I prefer to access/download/stream content through authorised platforms and do not access/download/stream illegally'.

Opinions are also positive regarding the quality and diversity of content offered by legal services. Notably, more than three quarters (76 %) 'totally agree' or 'tend to agree' that the quality of content offered by legal services is better than what can be found through illegal sources. There is a significant rise in the proportion agreeing that the quality of legal services is better compared to illegal sources since the first study in 2013 for this survey.

The proportion who have a preference for legal online content, if affordable, has also increased over the years by 9 percentage points. Whilst still the most convincing motivation to choose legal options, since 2013, the increase in those agreeing with this statement has not been as dramatic as the increase in the percentage of those who agree that the quality (+ 22pp) and diversity (+ 14pp) of content offered by legal services is better than what can be found through illegal sources.

([3]) Source: Q3: Please tell me if you totally agree, tend to agree, agree, tend to disagree or totally disagree with the following statements: (Total base; n= 25 636). TREND QUESTION.

Opinions on legal offers, trend since 2013 (4)



Paying for online content from legal sources has become far more widespread.

The preference to use legal sources for digital content is illustrated by the significant growth in the proportion that have actually paid to access content from legal sources online. More than 4 out of 10 Europeans (42 %) have paid to access, download or stream copyright-protected content from a legal service on the internet, a very significant (+ 17pp) increase since 2017. Compared to 2013, this figure more than doubled (+ 24pp). These findings align with other recent studies which observed a similar rise in the consumption of online subscription services, a development that only appears to have been reinforced by the COVID-19 pandemic (5).

Paid for online content from a legal service (6)

(4) Source: Q7: For each of the following statements regarding legal offers providing access to content such as music and films on the internet, please indicate whether you totally agree, tend to agree, tend to disagree, totally disagree: (Total base; n= 25636). TREND QUESTION.
(5) See for example: https://www.digitaltveurope.com/2020/05/11/coronavirus-accelerates-global-svod-growth/
(6) Source: Q4b: During the past 12 months, which of the following have you done? - Paid to access, download or stream copyright-protected content from a legal service on the internet (for instance music, video, film or TV series) (Total base; n= 25 636). TREND QUESTION.

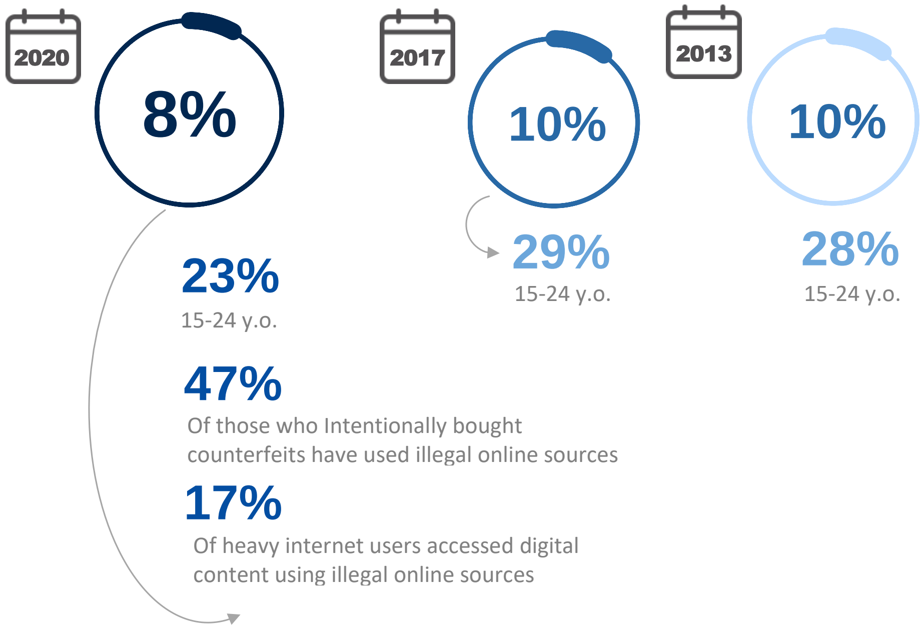
The main driver for those who report that they have not accessed digital content through illegal services is the availability of affordable content from legal sources.

Almost half (48 %) of those who have not used illegal sources for online content have not done so because of the availability of affordable content from legal sources. They are equally (48 %) driven by an understanding of the harm caused to musicians, writers, artists and creators from IP infringement.

The increase in use of legal sources for digital content has not translated into a significant reduction in the use of illegal ones, but there has been a small decline in the percentage of people in Europe who admit to using illegal online sources for digital content.

About 1 out of 10 Europeans surveyed (8 %) admitted to having used pirated online content intentionally during the past 12 months, only slightly below the figures reported in 2017 and 2013 (- 2pp). The proportion admitting use of illegal sources rises among young age groups and heavy internet users. Interestingly, those who accessed illegal online content intentionally, are also likely to have purchased online content. This suggests that people in Europe switch between both legal and illegal sources to access the content they need. As noted above, there is a clear overlap between people accessing illegal sources for digital content and people buying counterfeits.

Accessed, downloaded or streamed content from illegal online sources intentionally ([7])



Confusion about what a legal or illegal source is remains steady but the effort made to find out whether sources are legal or not is on the rise.

There was a rise between 2013 and 2017 in the confusion over what constitutes a legal or illegal source, but this trend has stopped. The current trend shows a steady proportion (23 %, compared to 24 % in 2017) who are ambiguous about what constitutes a legal or illegal offer.

([7]) Source: Q4b: During the past 12 months, which of the following have you done? – Accessed, downloaded or streamed content from illegal online sources intentionally (Total base; n= 25 636). TREND QUESTION.

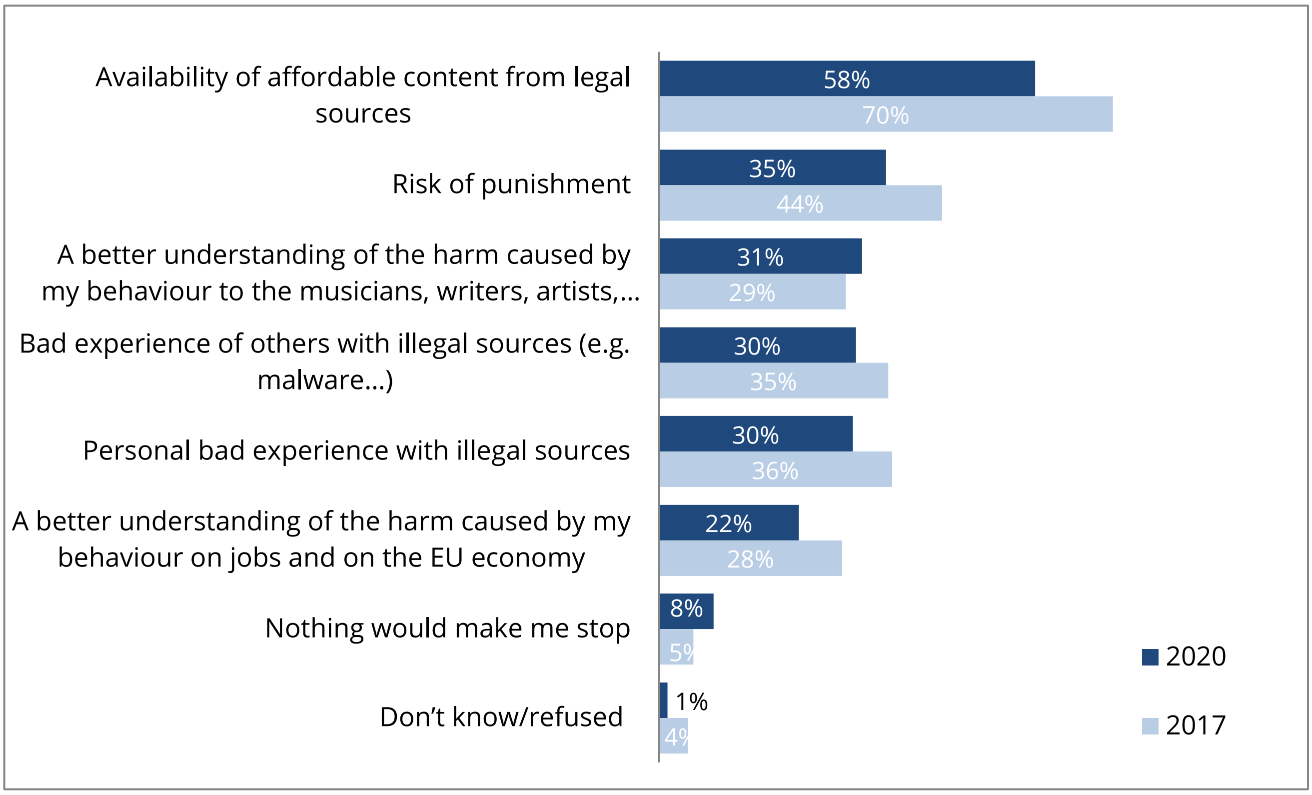
The evidence of this trend points towards an increase in the use of legal online sources and preferences for these legal sources. This is also supported by the rise in the proportion who research whether online content is from a legal source or not, from 14 % in 2017 to 20 % in 2020.

Compared to the use of pirated 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 less widespread, with only 7 % of those surveyed acknowledging they had done this over the last 12 months. An even smaller number (3 %) admitted having used illicit streaming devices, such as set-top boxes with pre-installed apps, to access pirated content. However, both these illegal activities cannot be considered insignificant, as young people are more likely to engage in these activities. Of those aged between 15 and 24, 15 % uploaded copyright-protected content and 7 % used illicit streaming devices.

The availability of affordable content remains the primary reason that would make those who access illegal sources stop, though it has declined substantially in importance. Arguments that it is for personal use have also declined substantially.

The availability of affordable content from legal sources is the most frequently mentioned reason to stop using pirated online content, followed by the risk of punishment and a better understanding of the harm caused to creators. Since 2017, the proportion citing that the availability of affordable content from legal sources would make them stop using pirated content has declined substantially (- 12pp).

What would make people stop using pirated online content? ([8])



([8]) Source: Q9a: You indicated that you used illegal sources (websites) intentionally for online content over the past 12 months. What are all the elements that would make you stop using illegal sources? (Total base; n= 2 434). TREND QUESTION.

1. INTRODUCTION

This report presents the findings of the 2020 study on 'European Citizens and Intellectual Property: Perception, Awareness and Behaviour' (2020 IP Perception study). The overarching aim of this study is to gather knowledge on Europeans' 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 at national level.

The study's main research tool is a survey among the general population of 15 years and above in the 27 EU Member States. A key aim of the 2020 IP Perception survey is to uncover trends, compared to the 2013 and 2017 studies within the same survey, highlighting the differences and similarities with previous years. With this in mind, the need to maintain comparability across the studies has guided the methodological approach and the survey's design. The existing survey questionnaire was thoroughly reviewed and selected changes and additions were made to the questionnaire to keep the IP Perception study up to date and capture new developments surrounding IP and IP infringement. The full survey questionnaire can be found in Annex 1.

The study also encompasses a literature review of similar surveys carried out since 2017, with the goal of identifying shifts in public knowledge/perception/opinion or shifts in the focus of the studies. The literature review helped inform the design of the questionnaire and is used to enrich and contextualise the survey findings. A summary of the literature review's findings is presented in Section 1.2**Error! Reference source not found.**.

1.1 SURVEY METHODOLOGY

The survey was conducted in the 27 EU Member States, between 1 June and 6 July 2020. The target population included all residents aged 15 and over (9). In total, 25 636 interviews were conducted across all 27 countries. At least 1 000 interviews were conducted in 24 of the 27 countries surveyed. In Cyprus, Luxembourg and Malta, a minimum of 500 respondents were interviewed. The unweighted sample size for each country is shown in Table 1.

No quotas were set, as is the rule for telephone surveys using a random sampling method (see below). Parental consent for participation was sought for those respondents between 15 and 18 years old. Those under 15 were screened out at the start of the interview.

The survey was carried out using a computer-assisted telephone interviewing (CATI) technique. In every country, a random sample (representative of the national population aged 15 or over) was drawn up. This meant that anyone belonging to the target universe had an opportunity to participate in the survey. A dual mobile/fixed telephone sampling frame was used.

To ensure a homogenous approach across countries, and to minimise potential errors, questionnaire programming and data cleaning and analysis were completely centralised. The sample was weighted in

(9) Respondents were residents in the country surveyed who had sufficient command of at least one of the respective national languages. In addition, only people 'living in private households' were selected, excluding prisoners, as well as residents of retirement homes, etc., who are difficult to contact in a telephone survey.

each country using a post-stratification weight method, including age, gender, phone ownership and a design weight. In addition, the EU-level results were weighted based on the countries' population size.

Note that the results for the 2013 and 2017 studies for the same survey were reweighted to exclude the results from the United Kingdom (UK), which was not covered by the current study.

All the 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 decimals and, as the percentages are rounded up, they may not add up to 100 % exactly. The bars in the charts take the decimals into account, which explains the small differences in the length of bars showing the same percentage.

Data collection for the survey is fully compliant with the General Data Protection Regulation (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 in 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	1 000
Belgium	1 002
Bulgaria	1 000
Croatia	1 000
Cyprus	587
Czechia	1 001
Denmark	1 001
Estonia	1 001
Finland	1 001
France	1 000
Germany	1 002
Greece	1 003
Hungary	1 002
Ireland	1 001

Country	Sample size
Italy	1 000
Latvia	1 009
Lithuania	1 006
Luxembourg	500
Malta	508
Netherlands	1 000
Poland	1 003
Portugal	1 000
Romania	1 007
Slovakia	1 000
Slovenia	1 001
Spain	1 001
Sweden	1 000
TOTAL	25 636

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 (completed education and undertaking education), occupational status, urbanisation level and household size. In addition, three distinct groups of online content users were distinguished: 'heavy', 'limited' and 'none' users ([10]).

([10]) These categories were based on the new 'Content use' question that was added to the current study. This question asked respondents whether they 1. Streamed or downloaded music or audio books; 2. Streamed or downloaded films or TV series; 3.

Table 2: Socio-demographic breakdown of the sample

Variable	Proportion
Gender	
Male	48 %
Female	52 %
Age	
15-24 years	11 %
25-39 years	24 %
40-54 years	26 %
55-64 years	17 %
65+	22 %
Age when left full-time education	
15 years	5 %
16-19 years	31 %
20+years	54 %
Still studying	10 %
No full-time education	*
Occupational status	
Self-employed	18 %
Employee	40 %
Manual worker	6 %
Without a professional activity	36 %
Urbanisation level	
Rural area or village	24 %
Small or middle-sized town	41 %
Large town	35 %
Household size	
1 person	22 %
2 persons	41 %
3 persons	20 %
4+ persons	16 %
Online content use	
Heavy	23 %
Limited	63 %
None	15 %

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 carried out four or more of these activities were qualified as 'heavy' users, those who had carried out one to three activities were qualified as 'limited' users, and those who had not carried out any of these activities were considered 'none' users.

1.2 LITERATURE REVIEW

As part of the study, a literature review was carried out, focusing on surveys on IP-related subjects released since 2017. The aim of the literature review was to capitalise on the existing body of evidence and to identify, on the one hand 1) trends in public knowledge/perception/opinion on IP and, on the other hand, 2) shifts in the focus of the studies carried out. The literature review was used both to inform the modifications made to the survey questionnaire and to contextualise its findings in the analysis stage.

The literature review was carried out 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. Large-scale surveys targeting consumers/businesses were the focus of the review. Studies (mainly) based on secondary data, or surveys with small sample sizes were excluded.

Each relevant survey was analysed according to its:

- Methodology:
  - online
  - telephone
  - other
- Target respondents:
  - consumers/general population
  - businesses
  - students
- Geographical scope:
  - Pan-European
  - national (Australia, France, UK, United States, etc.)
  - worldwide (multi-country)
- Main focus of the study:
  - understand attitudes and behaviours regarding counterfeiting and piracy
  - knowledge and attitudes about IP
  - general online behaviour and digital content consumption
  - other.

As the literature review part of the previous (2017) study included studies completed between 2013 and 2017, only studies released since 2017 were included in the current literature review. In total, 30 relevant studies were identified. A list of sources is provided in Annex 2.

Findings on coverage and methodology applied

As in 2017 and 2013, no Pan-European surveys on IP-related topics were identified. This means that the Youth Scoreboard and IP Perception survey, both conducted by the EUIPO, remain the only EU-wide surveys on IP available. Most studies identified (22 in total) are national-level surveys. At EU-level, this includes surveys in France (2), Germany, Hungary, Italy (2), Latvia (2), Spain (2) and Sweden. The remaining 8 surveys are 'worldwide' surveys, covering multiple countries across different continents. Compared to 2017, when 3 multi-country studies were identified, the number of multi-country or 'worldwide' studies is on the rise. In total, 22 of the 30 surveys identified by the review covered one or more EU Member States ([11]). Most of the studies (26) targeted consumers or the general population, which included surveys targeting specific population subgroups, such as young people or users of illegal content. Two surveys identified targeted businesses. A further two surveys targeted students.

The great majority of the studies identified (28) used online survey methodology. Four of these studies used a mixed-method approach, combining online interviewing with telephone (3) or face-to-face interviewing (1). In these cases, telephone or face-to-face interviewing was used in certain countries, to reach specific population subgroups who are less well-represented online (such as older people), or, for example, for a separate stakeholder survey. One study in Italy combined an online survey with social media analysis. A survey in Hong Kong used only telephone interviewing (CATI). A survey in South Korea was carried out using pen-and-paper personal interview (PAPI) survey methodology, for interviewing respondents at an event.

Almost all (29) of the surveys identified had a component aimed at understanding attitudes and behaviours towards counterfeiting and/or piracy. A large number of studies (22) covered general online behaviour and digital content consumption. A smaller number of studies (10) touched upon general knowledge and attitudes about IP.

Findings of the studies identified

With regard to the use of online content, a key finding of many of the studies reviewed is that the use of **legal** sources of online content is on the rise. This development was already observed in the 2017 literature review and has gained in importance since. The increase in the use of legal sources of online content is driven by rapid growth in the reach of subscription services for online video and music, such as Netflix and Spotify, which is observed in countries across the world, including in the EU. For example, a recent survey conducted by the Hungarian National Board Against Counterfeiting, reported that among young Hungarians aged 18 to 26, the reach of subscription services had doubled in just three years, from 19 % in 2017 to 34 % in 2020 ([12]). Similarly, a 2019 survey by the Swedish Patent and Registration Office showed that the daily use of online film and TV series among Swedes had increased from 25 % to 37 % in the last two years ([13]).

What could explain the rise in the use of legal online content? The most plausible answer is the increase in the availability of affordable online content. As in 2017, the surveys identified show that price and availability are the key drivers for consumers to opt for legal online content (or not). The report by the Swedish Patent and Registration Office found that the lack of legal alternatives was the most common explanation for using illegal material ([14]). A survey by the Australian government showed that 34 % of Australian 'infringers' would stop infringing if lawful services were cheaper, while 32 % would stop if everything they wanted was available

([11]) Note that this excludes studies carried out in the UK.
([12]) Available at: https://drive.google.com/file/d/1nkX8QrK4CTDJqBcXqRLs_zIhmVr-nkMs/view
([13]) Available at: https://www.prv.se/globalassets/in-swedish/upphovsratt/streama-lagligt/rapporten-prv-upphovsrattsundersokning-2019.pdf
([14]) Available at: https://www.prv.se/globalassets/in-swedish/upphovsratt/streama-lagligt/rapporten-prv-upphovsrattsundersokning-2019.pdf

lawfully [15]. The British Online Copyright Infringement Tracker listed the ‘cost’, ‘legal’ and ‘timely’ availability of content among the top four reasons for consumers to stop using pirated content [16]. A survey by the Canadian government found that one in two Canadian consumers (54 %) who had infringed in the last 3 months reported obtaining online content illegally instead of paying for it mainly due to it being free [17].

The increase in use of legal online content appears to go hand in hand with a decrease in the proportion of the population using pirated online content. A 2018 report on online piracy in France, found that the number of French ‘online pirates’ had declined by 8 % between 2016 and 2017 [18]. The same report found that the number of ‘convinced pirates’, those who only consume illegal content, had remained stable at around 2 % of the population. The survey by the Swedish Patent and Registration Office found that the proportion of Swedes using illegal digital services had declined sharply, from 21 % in 2017 to 14 % in 2020. Similarly, a Spanish survey found that the number of people who access online music illegally had declined from 34 % in 2017 to 29 % in 2018 [19]. This appears to be a global phenomenon, at least in the Western world. A report by the Australian government showed that the proportion of Australians using **only** pirated online content had declined from 10 % in 2018 to 1 % in 2019, while the proportion using a mix of legal and illegal online content had declined from 22 % to 15 % over the same period [20].

The above does not necessarily imply that the consumption of illegal online content has decreased in absolute terms. A report from the University of Amsterdam covering 14 countries across the globe observed an increase in the per capita volume of illegal content consumed, despite a decrease in the proportion of the population engaging in online piracy, including in most of the European countries covered [21]. This suggests that the issue of online piracy is increasingly confined to a relatively small group of ‘heavy offenders’, who consume a lot of illegal online content on an aggregate level.

Many studies reviewed found that these ‘heavy offenders’ are often young people, in line with what was found in previous surveys by the EUIPO, which showed that young people are over-represented among those who use pirated online content. A survey covering 21 countries worldwide by the International Federation of the Phonographic Industry, showed that 38 % of the 16 to 24-year-olds interviewed had used copyright infringement as a way to listen to or obtain music in the past month, compared to 27 % of the population as a whole [22]. A survey by the British government found that in the UK, those aged under 35 make up 66 % of all infringers [23]. Young people are also relatively likely to use novel and increasingly popular ways to obtain illegal online content, such as by means of illegal apps to watch Internet Protocol television (IPTV), including on set-top boxes, or so-called card sharing [24]. A Taiwanese survey found that 47 % of 18 to 24-year-olds and 61 % of 25 to 34-year-olds use apps to view copyright-infringing video content [25].

Are ‘heavy users’ of pirated online content willing to pay for legal online content? As was already noted in the literature review of the 2017 IP Perception survey by the EUIPO, the answer appears to be ‘Yes’. In its Global Online Piracy Study, the University of Amsterdam concluded that pirates are more likely to be legal

(15) Available at: https://www.communications.gov.au/file/48977/download?token=KvyH7EO2
(16) Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/729184/oci-tracker.pdf
(17) Available at: https://www.ic.gc.ca/eic/site/112.nsf/vwapj/07648-eng.pdf/$file/07648-eng.pdf
(18) Available at: http://www.editionmultimedia.fr/wp-content/uploads/2018/07/Etude-EY-sur-le-piratage-en-France-contenus-audiovisuels-28-06-18.pdf
(19) Available at: http://lacoalicion.es/wp-content/uploads/executive-piracy-observatory-2018_ok-5-april.pdf
(20) Available at: https://www.communications.gov.au/file/48977/download?token=KvyH7EO2
(21) Available at: https://www.ivir.nl/publicaties/download/Global-Online-Piracy-Study.pdf
(22) Available at: https://www.ifpi.org/downloads/Music-Listening-2019.pdf
(23) Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/729184/oci-tracker.pdf
(24) Card sharing is a method which allows multiple clients or digital television receivers to access a subscription television network with only one valid subscription card.
(25) Available at: https://avia.org/newly-released-survey-finds-one-third-of-taiwanese-online-consumers-have-accessed-streaming-piracy-websites-or-torrent-sites-28-use-illicit-streaming-devices-isds-to-view-pirated-tv-channels-and-vi/

users of online content than non-pirates, with the median legal consumption of pirates typically being twice that of non-pirates [26]. The survey in the same report also found that the demographic profile of pirates and legal users is very similar. A survey by Creative Content Australia showed that so-called stackers, or people with more than one subscription for online content, are more likely to pirate material [27].

Regarding counterfeits, few obvious trends can be observed in the existing body of surveys, except that buying counterfeit goods remains commonplace. In a survey by the Spanish government, one out of three respondents (32 %) stated that they had never bought a product knowing that it was counterfeit [28]. As is the case for pirated online content, youngsters are relatively more likely to buy counterfeits. In a survey by the International Trademark Association (INTA) covering 10 countries across the globe (including Italy in the EU), a massive 79 % of 'Generation Z' consumers (18 to 23-year-olds) confessed to having purchased counterfeit products in the past year [29].

Clearly not all purchases of counterfeits are intentional, and confusion about the authenticity of products remains an important issue, as was reported in earlier EUIPO studies. The 2018 MarkMonitor Online Barometer found that about a third (30 %) of consumers in Germany, France, Italy, the United States and the UK, have accidentally purchased fake products over the last 5 years [30]. In its worldwide survey on illicit trade, Oxford Economics reported that 'possibly illicit' purchases, where consumers lack confidence in the legitimacy of the products, comprise 27 % of the total purchases across Europe, whereas the estimated figure for known illicit purchases is 11 % [31]. In a survey on the counterfeiting of athletic footwear in the US, 35 % of all counterfeit purchases were made without knowing the item was fake [32].

The surveys reviewed tend to point to counterfeit goods' lower price as the main driver for buying these illegal goods. In the abovementioned survey by the Spanish government, three quarters (76 %) of those who bought counterfeits said they did so because it was cheaper. While in the INTA survey, 57 % of 'Generation Z' consumers said they could only afford the fake version of some brands. In a Korean survey, more than half of all respondents (56 %) indicated that counterfeits' low price was the most important factor for their purchase [33]. Meanwhile, awareness about the risks related to buying counterfeit goods tends to be high. In the MarkMonitor Online Shopping Barometer 2018, for example, the consumers surveyed said that they were worried about the risks related to buying counterfeits, including hackers stealing their personal details (65 % reported this); identity theft (59 % reported this); and scammers stealing money (56 % reported this). In the global survey of the INTA, 81 % of respondents agreed that fake products are unsafe.

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[26] Available at: https://www.ivir.nl/publicaties/download/Global-Online-Piracy-Study.pdf
[27] Available at: https://www.creativecontentaustralia.org.au/_literature_217915/2019_Australian_Piracy_Behaviours
[28] Internal survey, not available online.
[29] Available at: https://www.inta.org/Communications/Documents/INTA%20Gen%20Z%20Insights_Global.pdf
[30] Available at: https://www.markmonitor.com/download/report/MarkMonitor_Online_Shopping_Barometer-q4-2018.pdf?cid=pr&mod=article_inline
[31] Available at: http://blog.oxfordeconomics.com/combatting-illicit-trade
[32] https://meet.redpoints.com/lp-245-market-research-survey-footwear/
[33] https://ecck.eu/wp-content/uploads/2017/06/2017-Busan-Consumers-Perception-of-Counterfeit-Products_ENG.pdf

2. INTELLECTUAL PROPERTY – AWARENESS AND OPINIONS

EU citizens' subjective understanding of IP remains high at 80 % (+ 2 percentage points (pp) compared to 2017), though this varies substantially across the different countries. Awareness of IP is considerably below average among those who bought counterfeit goods (70 %) or intentionally accessed pirated online content (73 %), suggesting that that those with little understanding of IP are more likely to infringe it.

Europeans tend to understand the benefits of IP. Almost all (98 %) agree that it is important that inventors, creators and performing artists are able to protect their rights and be paid for their work. Only slightly fewer (90 %) agree that IP contributes to improving and guaranteeing the quality of products and services.

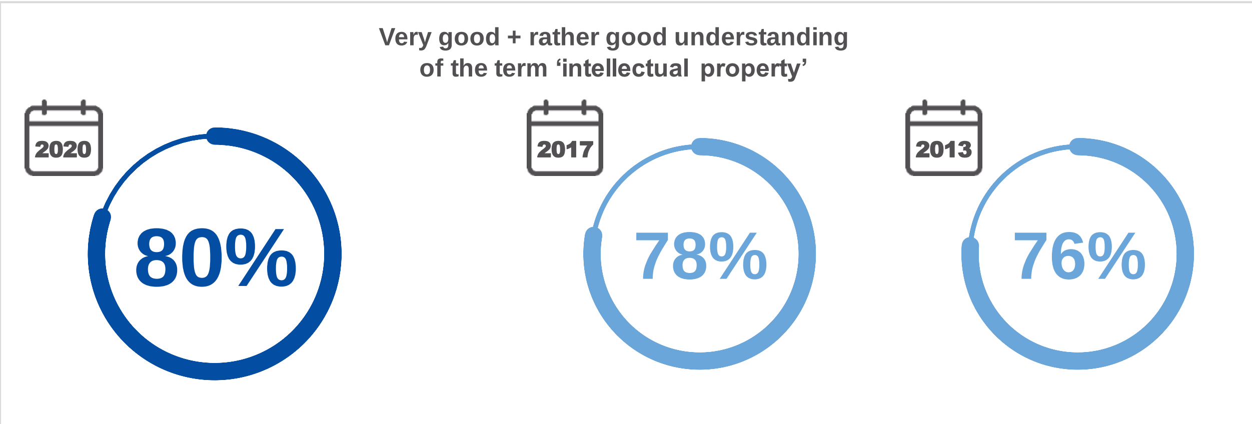
While understanding may be high, few Europeans (4 %) believe that IP mainly benefits people like themselves. In fact many still believe that IP mainly benefits the 'elite', such as famous artists and big companies. However, the proportion of Europeans who think that IP is most beneficial to creators of artistic content has doubled, from 10 % in 2017 to 20 % in 2020, although it should be stressed that two more categories were added to this question item in 2020 ('authors/writers' and 'filmmakers').

2.1 GENERAL UNDERSTANDING OF THE CONCEPT OF IP

EU citizens' subjective understanding of the concept of IP is high. As can be seen in

, 8 out of 10 Europeans surveyed (80 %) say they have a 'very good' or 'rather good' knowledge of the meaning of the term 'intellection property'. Overall subjective understanding of IP is similar to that observed in 2017 (+ 2pp) and 2013 (+ 4pp).

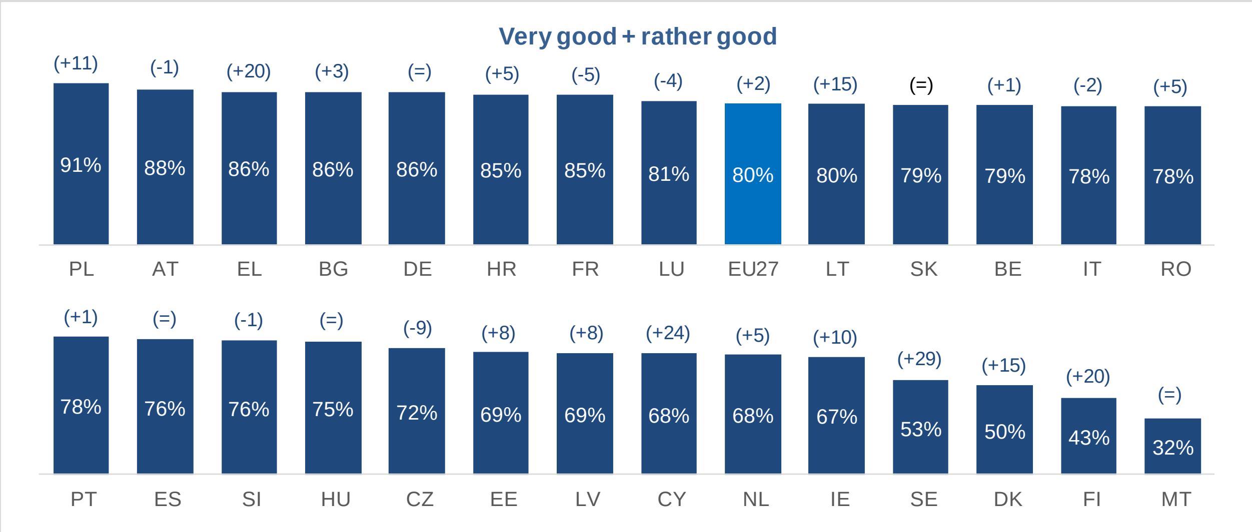
Figure 1: Understanding of the concept of IP, compared to 2017 (34)



(34) Source: 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= 25 636). TREND QUESTION.

Europeans' subjective 'very good' or 'rather good' understanding of the term 'intellectual property' varies substantially across countries, ranging from 91 % in Poland to 32 % in Malta, see Figure 2. Other countries with a high subjective understanding of IP include Austria (88 %) and Greece, Bulgaria and Germany (all with 86 %). Apart from in Malta, the self-declared understanding of IP is also relatively low in Finland (41 %), Denmark (50 %) and Sweden (53 %), although in all of these countries (except Malta) the subjective understanding of IP has improved substantially since 2017.

Figure 2: Understanding of the term 'intellectual property' per country (35)



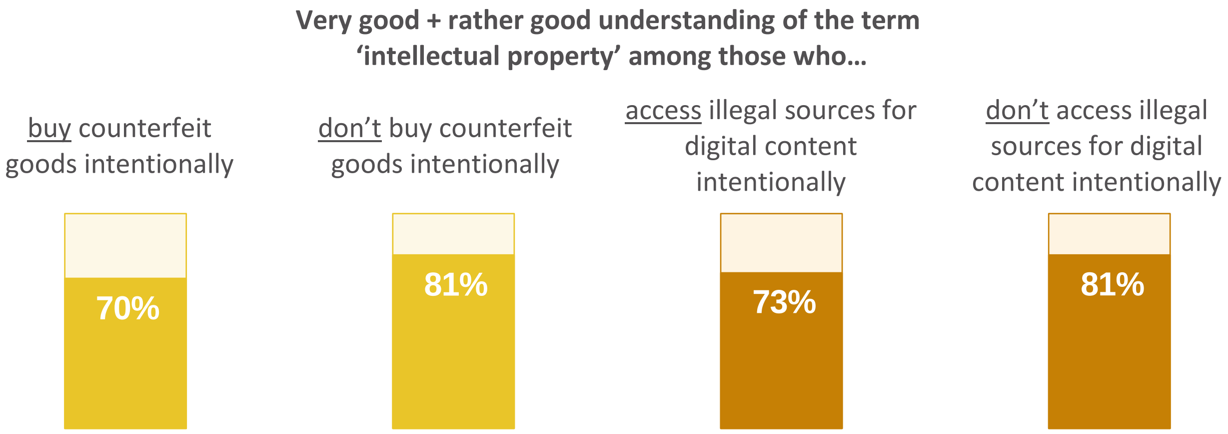
* Difference with 2017 in brackets, in percentage points.

Generally, socio-demographic differences in the subjective understanding of IP are not very marked. However, a relatively low 'very good' or 'rather good' understanding of the term 'intellectual property' is observed for those who finished their education before they turned 16 years old (68 %), for those under 24 years old (71 %), and for those without a professional activity (74 %).

Importantly, the data shows that the subjective understanding of the term IP is substantially below average (70 % and 73 %, respectively) for those who admit they bought counterfeit goods or accessed pirated online content intentionally over the last 12 months, see figure below (36). This suggests that those with little understanding of IP are more likely to infringe it.

(35) Source: 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= 25 636). TREND QUESTION.
(36) See Sections 3 and 4 for more information on those who bought counterfeits or accessed pirated online content.

Figure 3: Understanding of IP and infringing IP



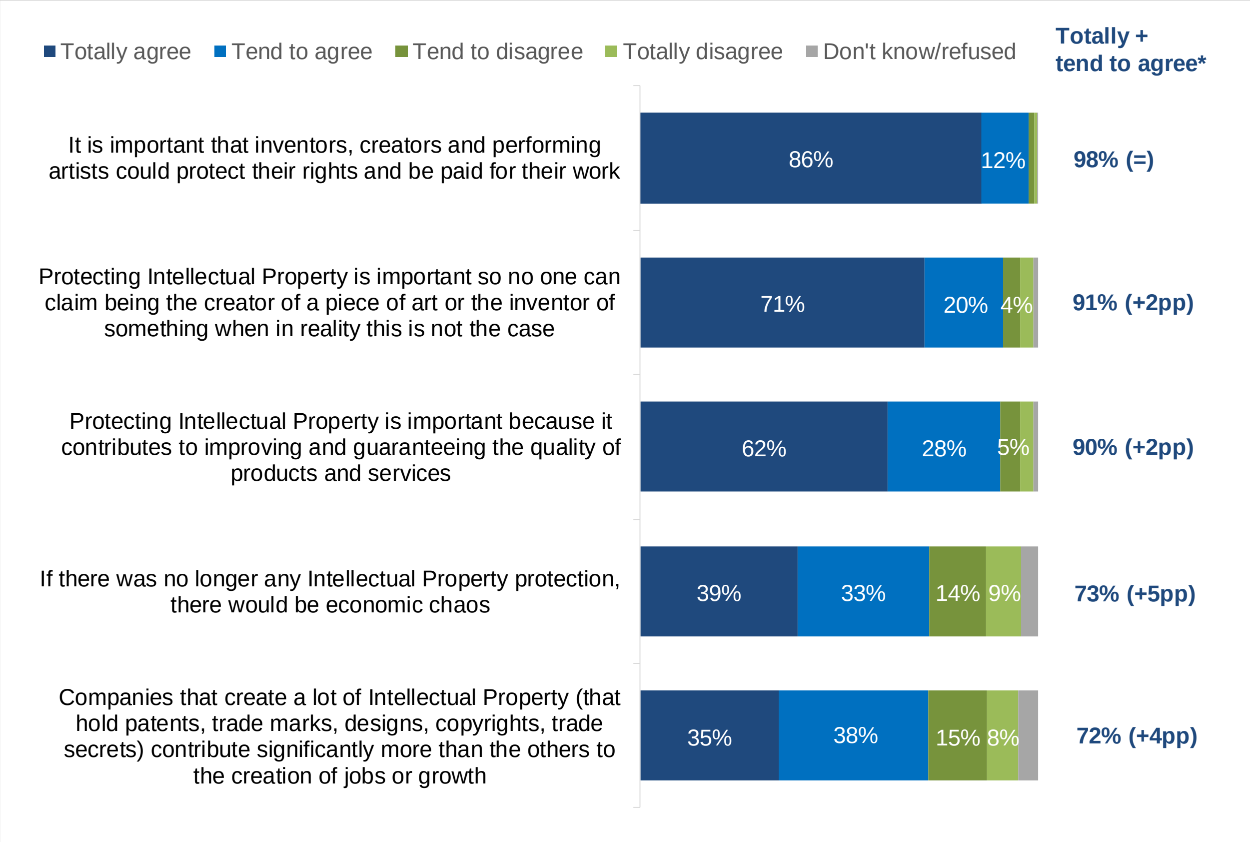
2.2 UNDERSTANDING OF THE BENEFITS OF IP

Europeans tend to understand the benefits of IP. Virtually all (98 %) 'totally agree' or 'tend to agree' that it is important that inventors, creators and performing artists are able to protect their rights and be paid for their work, see Figure 4. Moreover, the majority agree that protecting IP is important because it:

- ensures that 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 (91 % totally or tend to agree);
- contributes to improving and guaranteeing the quality of products and services (90 % totally or tend to agree).

There is slightly less consensus among Europeans regarding the contribution of IP to the economy. Even so, 72 % 'totally' or 'tend to' agree that companies that hold patents, trade marks, designs, copyrights or trade secrets contribute significantly more than other companies to the creation of jobs or growth. And close to three quarters (73 %) agree that if there was no longer any IP protection, there would be 'economic chaos'. These figures are slightly better in terms of the understanding of IP than those observed in 2017.

Figure 4: Understanding of the benefits of IP (37)



* Difference with 2017 in brackets, in percentage points.

The high perception of the benefits of IP is visible across socio-demographic groups and countries. Notably, those who infringe IP have a good understanding of it is benefits, even though their perception of the benefits of IP is somewhat lower than for the population as a whole. For example, 95 % of those who admit to have accessed pirated online content during the last 12 months (see Chapters 3 and 4), 'totally agree' or 'tend to agree' that it is important that inventors, creators and performing artists are able to protect their rights and be paid for their work.

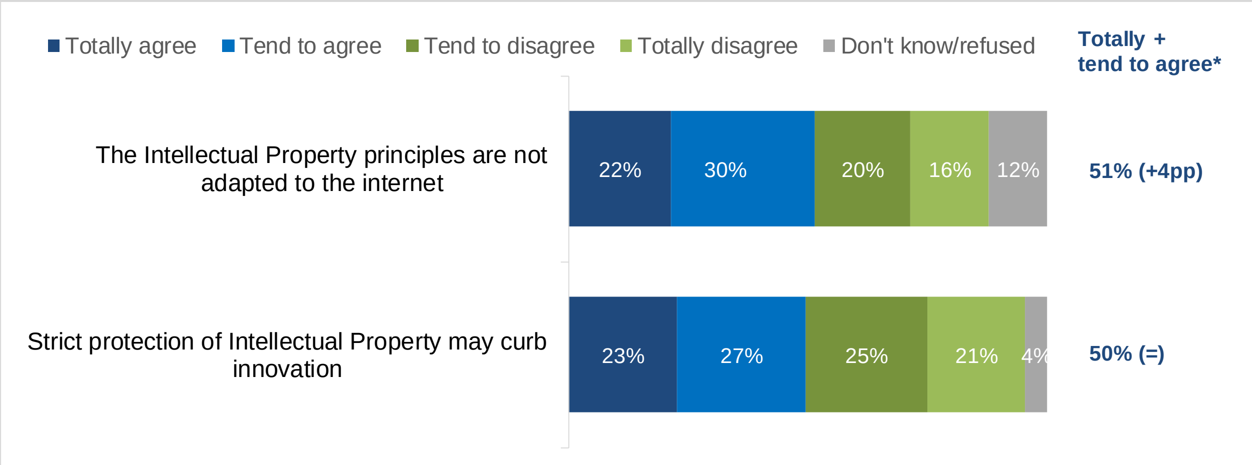
When asked about their opinion on statements that point to hypothetical drawbacks or limitations of IP, a slightly greater proportion of the EU population agrees with these statements rather than disagreeing. As can be seen in Figure 5, half of Europeans (50 %) 'totally agree' or 'tend to agree' that strict protection of IP may curb innovation, while a similar proportion (46 %) 'totally' or 'tend to' disagree. A small majority of Europeans (51 %) 'totally agree' or 'tend to agree' that the IP principles are not adapted to the internet (meaning that the IP principles are not suited or relevant to internet use). These figures have not changed or have hardly changed since 2017.

Young Europeans especially perceive the hypothetical drawbacks or limitations of IP. Noticeably, more than 6 out of 10 respondents aged 15 to 24 (61 %) 'totally agree' or 'tend to agree' that the IP principles

(37) Source: Q5: Please indicate whether you totally agree, tend to agree, tend to disagree or totally disagree with each of the following statements:(Total base; n=25 636). TREND QUESTION.

are not adapted to the internet [38]. A slightly smaller proportion (57 %) of the same age group, 'totally agree' or 'tend to agree' that strict protection of IP may curb innovation.

Figure 5: Opinions on the hypothetical limitations of IP [39]



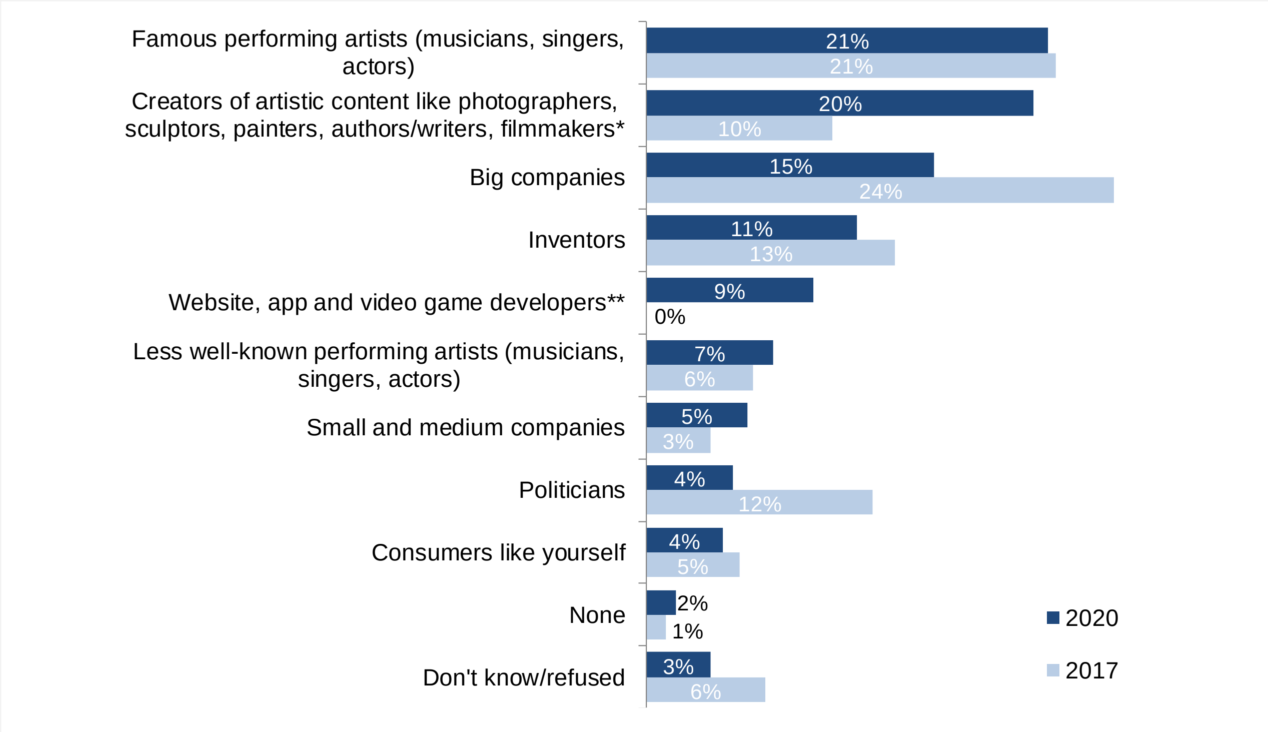
* Difference with 2017 in brackets, in percentage points.

The survey also looked at what beliefs are held by those in Europe about who mainly benefits from the protection of IP. The share of Europeans who think that IP is most beneficial to creators of artistic content is 20 %, double the proportion (+ 10pp) who reported this in 2017. It should be noted, however, that the categories 'authors/writers' and 'filmmakers' were added to this question item in 2020, which might explain some of the change compared to the last study. It is also interesting to note that almost 1 out of 10 (9 %) respondents feel that website, app and video game developers benefit most from IP, an answer item that was added for the first time in the current 2020 survey questionnaire.

As was the case in 2017, few Europeans surveyed feel that IP protection benefits consumers like themselves the most – only 4 % agreed with this in 2020, compared to 5 % in 2017. And many still believe that IP mainly benefits the 'elite', such as famous artists (21 %) and big companies (15 %), even though the share of those answering that large companies benefit the most declined substantially compared to 2017 (- 9pp). In 2020, fewer think IP mainly benefits politicians (4 % in 2020 versus 12 % in 2017). A very small proportion of Europeans (2 %) feel that IP does not benefit anyone at all.

[38] This may be related to a higher awareness about this subject among younger people. Whereas 5 % of those aged between 15 and 24 don't know if the IP principles are not adapted to the internet, this figure is 19 % for those aged 55 and above.
[39] Source: Q5: Please indicate whether you totally agree, tend to agree, tend to disagree or totally disagree with each of the following statements:(Total base; n=25 636). TREND QUESTION.

Figure 6: Who benefits the most from the protection of intellectual property? ([40])



*Question item rephrased in the 2020 questionnaire ('authors/writers' and 'filmmakers' were added).
**Question item new in the 2020 questionnaire.

([40]) Source: Q2: In your opinion, who benefits the most from the protection of intellectual property? (Total base; n= 25 636). TREND QUESTION.

3. COUNTERFEIT GOODS – OPINIONS AND CONSUMPTION

Europeans tend to be aware of the negative effects of counterfeit goods on the economy and health and safety. For example, 83 % agree that buying counterfeit goods ruins businesses and jobs. Moreover, only a small minority of EU citizens see valid reasons for buying counterfeit goods. For example, only 15 % of Europeans agree that it is acceptable to buy luxury counterfeit products.

The proportion of Europeans who admit to having intentionally purchased counterfeit goods during the last 12 months has declined, from 7 % in 2017 to 5 % in 2020, bringing it back in line with the figure observed in 2013 (4 %). Younger people are more likely to admit having purchased counterfeits intentionally – 10 % of those aged between 15 and 24 admitted this. In some countries, whilst still a small minority, significantly more respondents than the average admitted buying counterfeits, including in Portugal (13 %) and Slovenia (12 %).

A third of Europeans (33 %) have wondered during the last 12 months whether a product they bought was original or not, down from 37 % in 2017. About 1 in 10 (9 %) was misled into buying counterfeit goods during the past year, a figure that has remained more or less stable since 2017 (- 1pp).

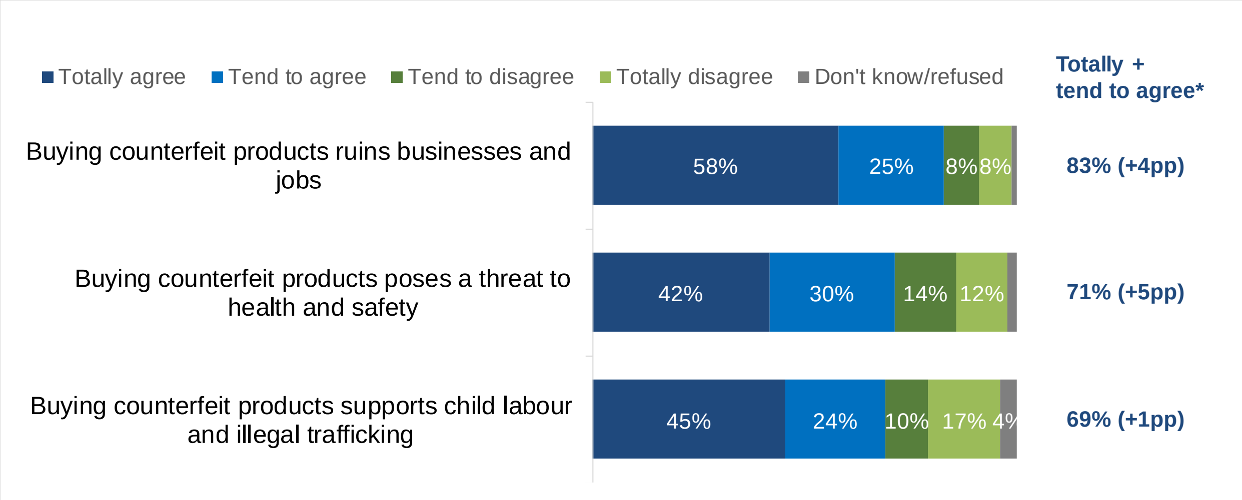
The availability of affordable genuine products remains the main reason that would make consumers of counterfeit goods stop this behaviour; 52 % of those buying counterfeits say this would make them stop. Reputational damage is more compelling now than in 2017, with more respondents (17 %; + 5pp) saying that they would not buy counterfeits because this may harm their image.

3.1 OPINIONS ON COUNTERFEIT GOODS

Those living in Europe are generally aware of the negative effects that buying counterfeit goods have on the economy, as well as on health and safety. Notably, more than 8 out of 10 (83 %) ‘totally agree’ or ‘tend to agree’ that buying counterfeit goods ruins businesses and jobs, see Figure 7. 7 out of 10 (71 % ([41])) ‘totally agree’ or ‘tend to agree’ that buying counterfeit products poses a threat to health and safety. A similar proportion (69 %) agree that buying counterfeit products supports child labour and illegal trafficking. These opinions did not change considerably since 2017 and are shared across socio-demographic groups.

([41]) 71 % and not 72 %, due to rounding.

Figure 7: Opinions on buying counterfeit goods ([42])

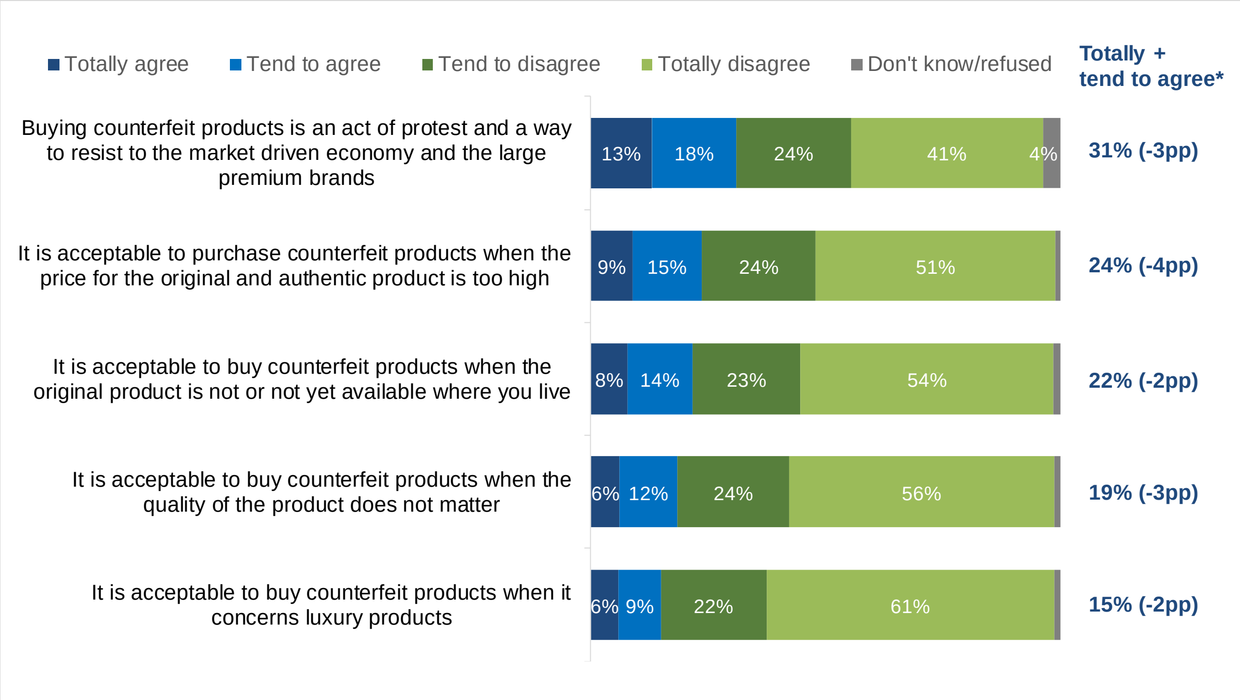


* Difference with 2017 in brackets, in percentage points.

Only a minority of EU citizens feel that there are valid reasons or justifications for buying counterfeit goods. For example, only 15 % of Europeans agree (totally or tend to) that it is acceptable to buy counterfeit goods when it concerns luxury products (see figure below). Slightly more (19 % to 24 %) ‘totally’ or ‘tend to’ agree that it is acceptable to buy counterfeit products when the quality of the product does not matter, when the original product is not (or not yet) available where you live, or when the price for the original, authentic product is too high. The most acceptable reason for the purchase of counterfeit goods appears to be as ‘an act of protest and a way to resist the market-driven economy and the large premium brands’, with slightly less than one third (31 %) agreeing with this statement. These figures tend to have improved slightly since 2017 (meaning that acceptance is down).

([42]) Source: Q3: Please tell me if you totally agree, tend to agree, agree, tend to disagree or totally disagree with the following statements: (Total base; n= 25 636). PARTIAL TREND QUESTION.

Figure 8: Opinions on justifications for buying counterfeit goods (43)



* Difference with 2017 in brackets, in percentage points.

Predominantly young people (under 24 years old) feel that there are valid reasons for buying counterfeit goods. For example, 37 % of this age group 'totally agree' or 'tend to agree' that it is acceptable to purchase counterfeit products when the price for the original, authentic product is too high, compared to 24 % of all those surveyed who agreed with this statement. When it comes to buying luxury counterfeit products, the difference is most pronounced: 30 % of those aged between 15 and 24 'totally agree' or 'tend to agree' that this is acceptable, which is double the proportion (15 %) of the population as a whole.

Respondents who admit they bought counterfeits (see section below), are likely to indicate that this can be justified. Two thirds (64 %) of those who bought counterfeit goods intentionally, feel that it is acceptable to do so when the price of the original, authentic product is too high. Only slightly fewer (58 %) of those who bought counterfeit goods intentionally feel it is acceptable when the original product is not available (or not yet available) where they live.

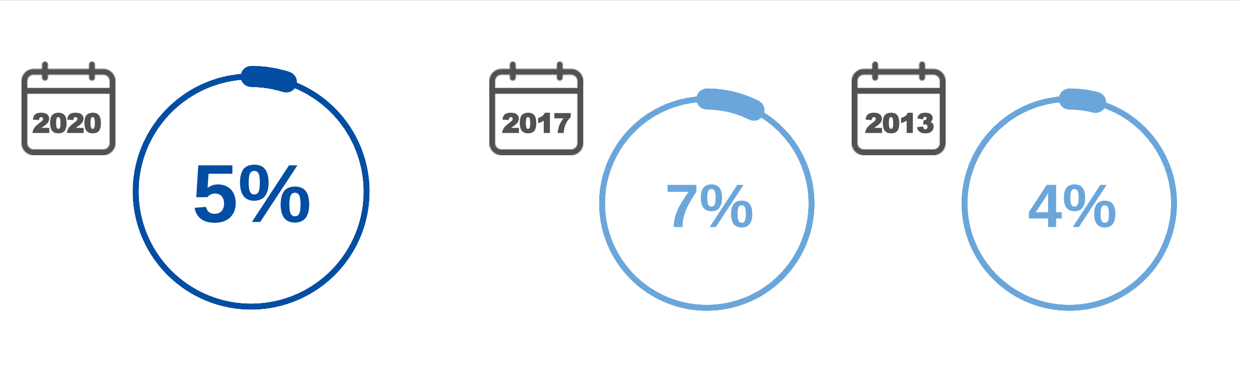
For more details on the profile of those who buy counterfeits, see the following section.

(43) Source: Q3: Please tell me if you totally agree, tend to agree, agree, tend to disagree or totally disagree with the following statements: (Total base; n= 25 636). PARTIAL TREND QUESTION.

3.2 CONSUMPTION OF COUNTERFEIT GOODS

The proportion of Europeans who confessed to having recently purchased counterfeit goods is low, although in absolute terms, it is still a very significant phenomenon, considering the size of the EU's population. In the current study within the survey, 5 % admitted to having purchased counterfeits intentionally in the last 12 months (see Figure 9). The prevalence of admitted intentional purchasing of counterfeits has not changed much since 2013, though 2017 did show a somewhat higher figure (7 %).

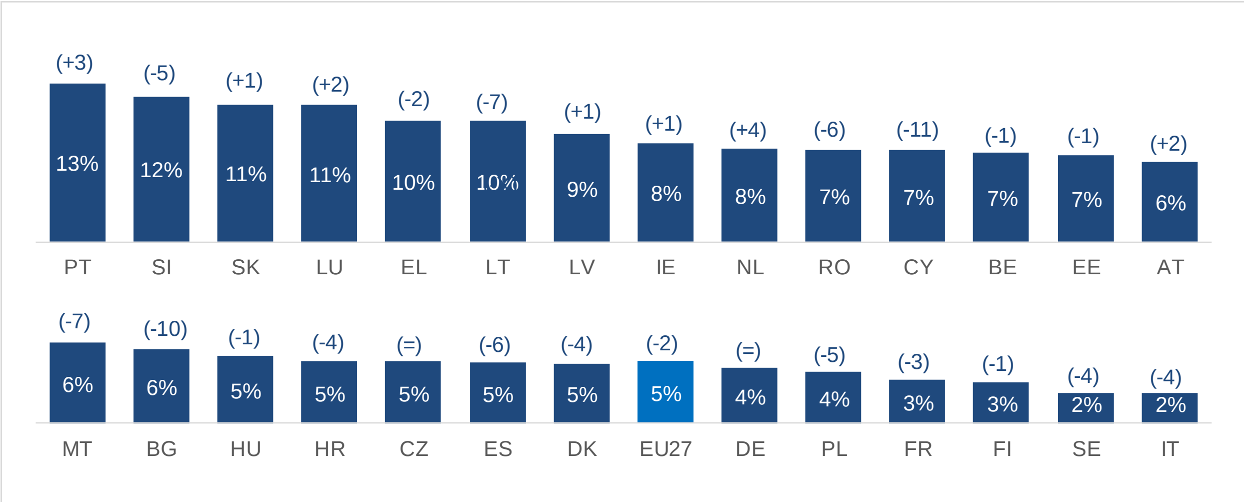
Figure 9: Bought counterfeit products intentionally (44)



The proportion of Europeans who declared that they had intentionally bought counterfeit goods during the last 12 months varies substantially across countries, ranging from 13 % and 12 % in Portugal and Slovenia, to 2 % in Sweden and Italy. The self-declared consumption of counterfeit goods is also high in Slovakia and Luxembourg (both 11 %), as well as in Greece and Lithuania (both 10 %). Of course, this does not necessarily reflect a higher or lower prevalence of buying counterfeit goods in these countries. It could simply reflect more of a readiness to admit this kind of behaviour.

(44) Source: Q4a: During the past 12 months, which of the following have you done? - Bought counterfeit products intentionally (Total base; n= 25 636). TREND QUESTION.

Figure 10: Bought counterfeit products intentionally per country ([45])



* Difference with 2017 in brackets, in percentage points.

Which Europeans confessed to having bought counterfeit goods intentionally? As can be observed in the table below, people who bought counterfeit goods intentionally over the last 12 months are usually young. Their age explains why those who bought counterfeits intentionally are also frequently still studying and living in larger households, presumably with their parents. People who bought counterfeit goods intentionally are often heavy online content users, which might relate to the fact that counterfeit goods are frequently sold on online marketplaces ([46]). People who access, download or stream content from illegal online sources intentionally also often buy counterfeit goods. This suggests that the two main issues covered by this study – the buying of counterfeits and accessing of pirated online content – are related and are partly caused by the same people.

Table 3: Profile of those buying counterfeit goods intentionally

Variable	Bought counterfeit goods intentionally
Gender	
Male	6 %
Female	4 %
Age	
15-24 years	10 %
25-39 years	7 %
40-54 years	4 %
55+	3 %
Age when left full-time education	
15 years	4 %

([45]) Source: Q4a: During the past 12 months, which of the following have you done? (Total base; n= 25 636). TREND QUESTION.
([46]) 'Online marketplaces have increasingly become key distribution channels for counterfeit goods, with criminals attempting to copy the notable success of legal online business model'. See: https://euipo.europa.eu/tunnel-web/secure/webdav/guest/document_library/observatory/documents/reports/Executive%20Summary%20Situation%20Report%20EUIPO-Europol_en.pdf

Variable	Bought counterfeit goods intentionally
16-19 years	6 %
20+ years	4 %
Still studying	9 %
No full-time education*	12 %
Occupational status	
Self-employed	5 %
Employee	4 %
Manual worker	7 %
Without a professional activity	5 %
Urbanisation level	
Rural area or village	5 %
Small or middle-sized town	4 %
Large town	5 %
Household size	
1 person	4 %
2 persons	4 %
3 persons	6 %
4+ persons	8 %
Online content use	
Heavy	8 %
Limited	4 %
None	3 %
Accessed pirated online content intentionally	
Yes	30 %
No	3 %

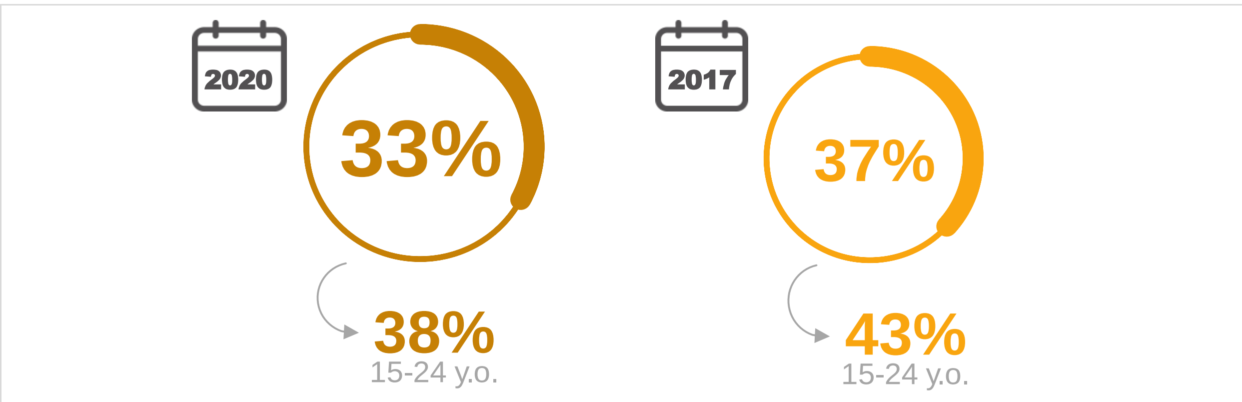
**Small base (n=178)*

Buying counterfeits is not always an intentional act. On the contrary, as noted in various other studies (see Section 1.2), many people are tricked into buying counterfeits, and even more are unsure whether a product they bought is in fact legitimate or not [47]. This pattern in also visible in the current study. About 1 out of 10 Europeans surveyed (9 %) bought counterfeit products over the last 12 months as a result of being misled. This figure has remained more or less stable since 2017 (- 1pp), after increasing between 2013 and 2017. Again, this figure is higher for the youngest age group, with 12 % of those aged between 15 and 24 saying they had bought counterfeit products as a result of being misled. For those still studying, the comparable figure is slightly higher, at 14 %.

Figure 11: Bought counterfeit products as a result of being misled [48]

A much larger proportion of Europeans (33 %) had wondered if a product they had bought during the last 12 months was genuine or counterfeit. This proportion is 4 percentage points lower than in 2017. In line with the other figures on buying counterfeits, the proportion who wondered if a product they had bought was genuine or counterfeit is higher (38 %) for those aged between 15 and 24.

Figure 12: Wondered if a product they had bought was genuine or counterfeit [49]



[47] For example, in its worldwide survey on illicit trade, Oxford Economics reported that 'possibly illicit' purchases, where consumers lack full confidence in the legitimacy of products, comprise 27 % of total purchases across Europe, whereas the estimated figure for known illicit purchases is 11 %. Available at: http://blog.oxfordeconomics.com/combatting-illicit-trade

[48] Source: Q4a: During the past 12 months, which of the following have you done? - Bought counterfeit products as a result of being misled (Total base; n= 25 636). TREND QUESTION.

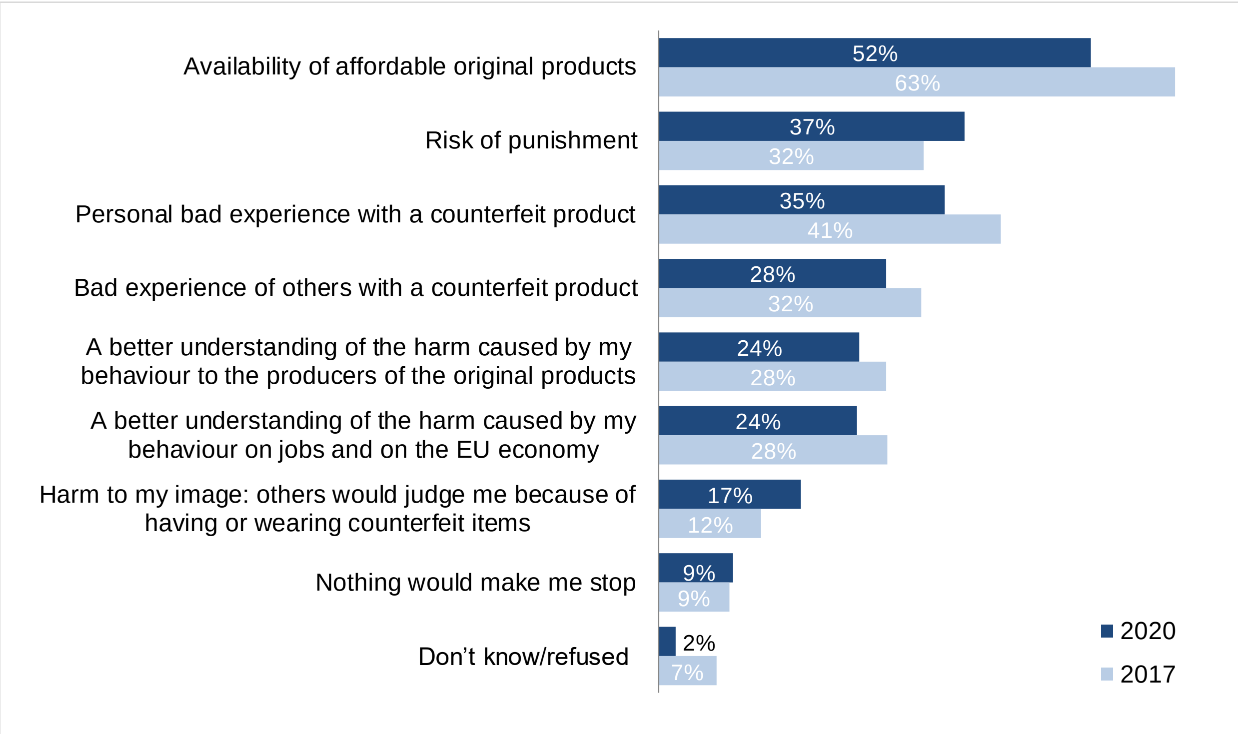
[49] Source: Q4a: During the past 12 months, which of the following have you done? - Wondered if a product you bought was genuine or counterfeit (Total base; n= 25 636). TREND QUESTION.

3.3 REASONS FOR BUYING OR NOT BUYING COUNTERFEIT GOODS

The availability of affordable products is the main reason that would persuade buyers of counterfeit goods to discontinue this behaviour, as opposed to the risk of punishment or because of a bad personal experience (50). Compared to 2017, in absolute terms, the availability of affordable products is now a less important driver for dissuading people from purchasing counterfeit goods (- 10pp), although it is still the most important one. This is the case across all the socio-demographic groups. The risk of punishment is an important driver for young people to stop buying counterfeits, with 46 % of those aged between 15 and 24 and who bought counterfeits reporting this.

The potential harm to one's image that buying counterfeits can cause is an increasingly important reason to stop buying counterfeits. In 2020, 17 % of respondents reported this as a driver to discontinue buying counterfeits, compared to 12 % in 2017 (+ 5pp). 'Harm to image' is an especially important driver for younger people, with 22 % of those aged between 15 and 24 reporting this as the main reason to stop buying counterfeits.

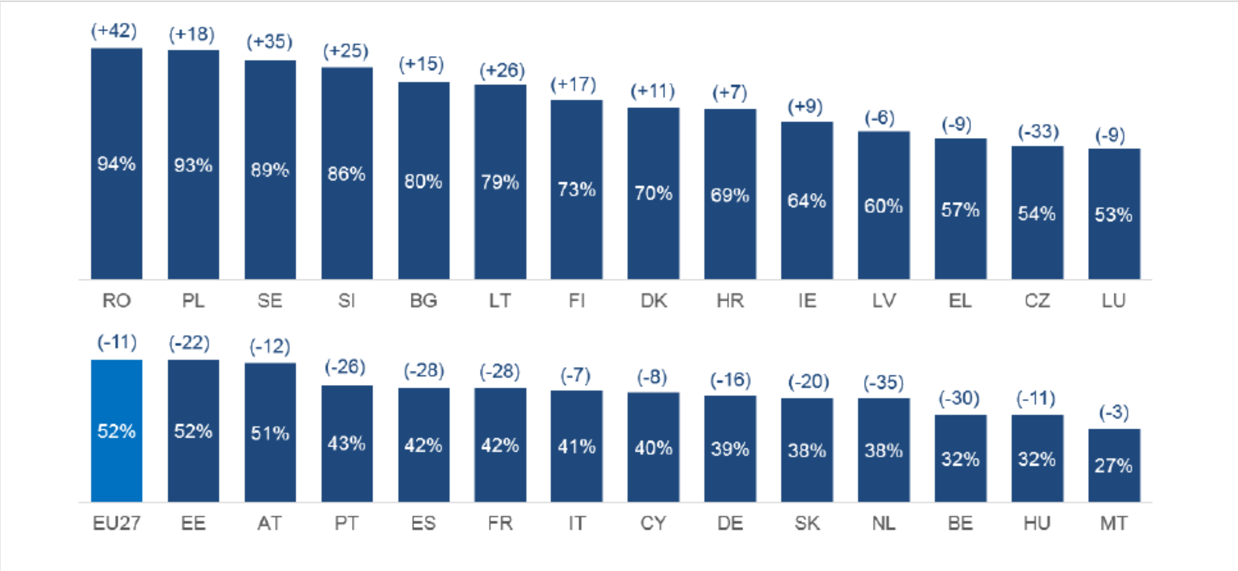
Figure 13: What would make people stop buying counterfeit goods? (51)



The availability of affordable original products is the main reason to stop buying counterfeits among those who have bought them intentionally in almost all of the countries covered by the survey. Nonetheless, differences between countries are substantial. While 94 % of Romanians surveyed and 93 % of Poles surveyed reported that the availability of affordable original products is a key reason for them to stop buying counterfeits, this figure was 27 % in Malta, and 32 % in Belgium and Hungary.

(50) This is in line with the findings in many existing surveys, which point to the (lower) price of counterfeit goods being the key driver for buying these illegal goods, see Section 1.2.
(51) Source: 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= 1 746). TREND QUESTION.

Figure 14: Availability of affordable original products as a reason to stop buying counterfeits per country ([52])



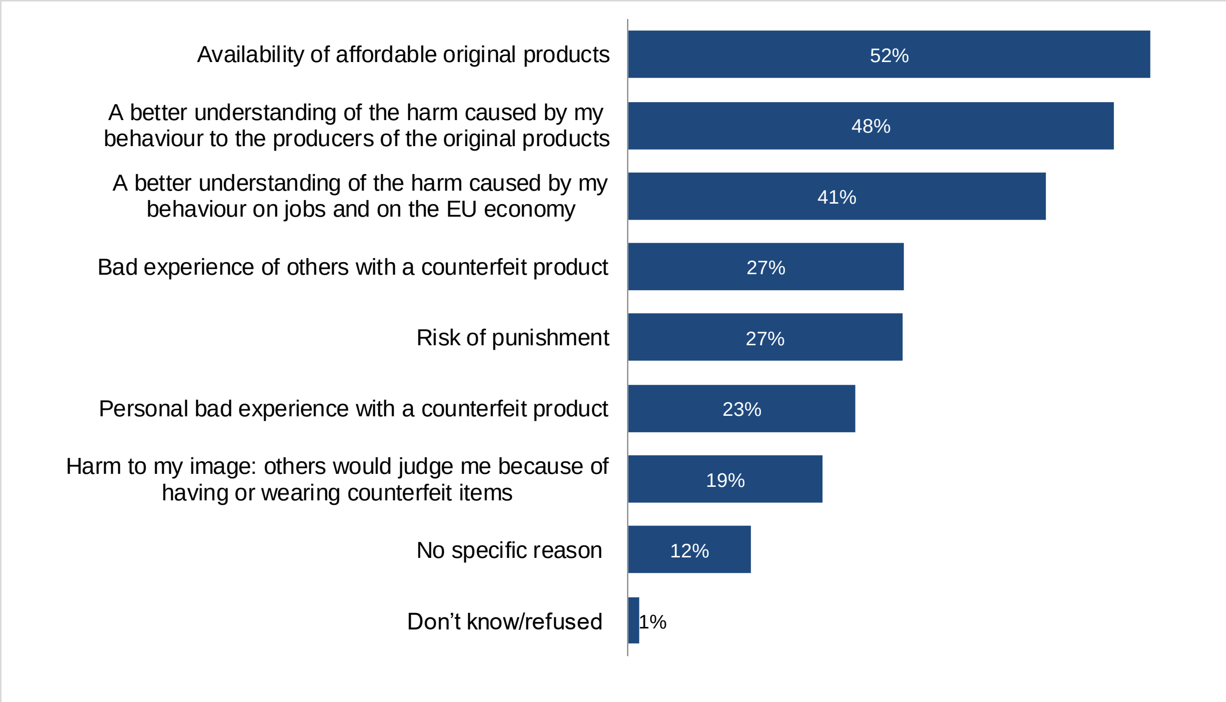
* Difference with 2017 in brackets, in percentage points.

In the current survey, for the first time, those who replied that they did **not** buy counterfeit goods intentionally during the last 12 months were asked about their main reasons for not doing so. As can be noted in the chart below (Figure 15), the availability of affordable original products is also the main reason for not buying counterfeits for this group of respondents. However, compared to those who **did** buy counterfeits intentionally, those who did **not** are significantly more likely to have not done so because of their understanding of the harm caused to producers and jobs and the economy – respectively 48 % and 41 % of those not buying counterfeits mentioned these to be key reasons, compared to 24 % of those buying counterfeits (see above). This suggests that awareness of the negative effects is related to the purchase of counterfeit goods.

It is interesting to note that young people who did **not** buy counterfeit goods intentionally in the past 12 months, often mention having had a bad personal experience with buying counterfeit goods as a reason for no longer doing so – 31 % of those aged between 15 and 24 reported this, compared to 23 % of all respondents. At the same time, younger respondents are less likely (than the average) to mention not buying counterfeits because of their understanding of the harm caused to producers and jobs and the economy (42 % and 34 % of those aged between 15 and 24 mention these as key drivers for not buying counterfeits).

([52]) Source: 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? – Availability of affordable original products (Total base; n= 1 746). TREND QUESTION.

Figure 15: Reasons for not buying counterfeit goods (53)



(53) Source: Q8b: 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. (Total base; n= 23 589). NEW QUESTION.

4. PIRATED ONLINE CONTENT – OPINIONS AND CONSUMPTION

While Europeans are generally opposed to the use of pirated online content, slightly more than a quarter agree that it is acceptable to obtain pirated online content when there is no immediately available legal alternative or when it is for personal use. Even so, the share of those who agree that it is acceptable to obtain pirated online content for personal use has decreased significantly (- 15pp since 2013).

More than 4 out of 10 Europeans (42 %) have paid to access, download or stream copyright-protected content from a legal service on the internet over the last 12 months, a very significant (+ 17pp) increase since 2017. Compared to 2013, this proportion has more than doubled (+ 24pp).

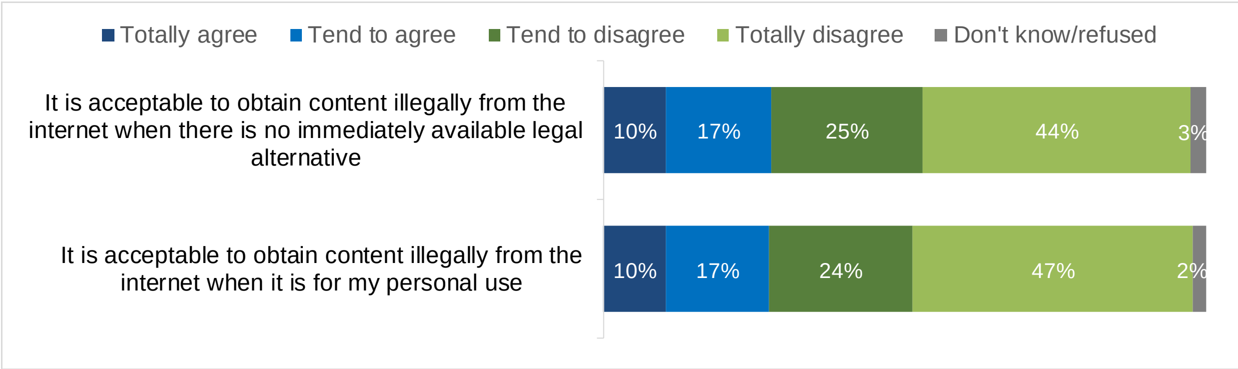
About 1 out of 10 Europeans surveyed (8 %) admitted to having intentionally accessed online content through illegal sources over the last 12 months, somewhat below the figure reported in 2017 (- 2pp). Among the younger age groups, the proportion using pirated online content is higher than average. Interestingly, those who intentionally accessed online content from illegal sources, are also likely to have purchased online content.

The availability of affordable content from legal sources is the most frequently mentioned reason to stop using pirated online content, followed by the risk of punishment and a better understanding of the harm caused to creators. Since 2017, the proportion citing that the availability of affordable content from legal sources would make them stop using pirated content has declined substantially (- 12pp).

Europeans on average find it unacceptable to obtain content illegally from the internet, but the proportion that condones this kind of behaviour is nonetheless substantial. Slightly more than a quarter (28 % and 27 %, respectively) ‘totally agree’ or ‘tend to agree’ that it is acceptable to obtain content illegally from the internet when there is no immediately available legal alternative, or that it is acceptable to obtain content illegally from the internet when it is for personal use.

Younger Europeans are more permissive in relation to pirated online content. More than 4 out of 10 (43 %) of those aged between 15 and 24 ‘totally agree’ or ‘tend to agree’ that it is acceptable to obtain content illegally from the internet when there is no immediately available legal alternative. A similar proportion (41 %) of those from the same age group also ‘totally agree’ or ‘tend to agree’ that it is acceptable to obtain content illegally from the internet when it is for personal use.

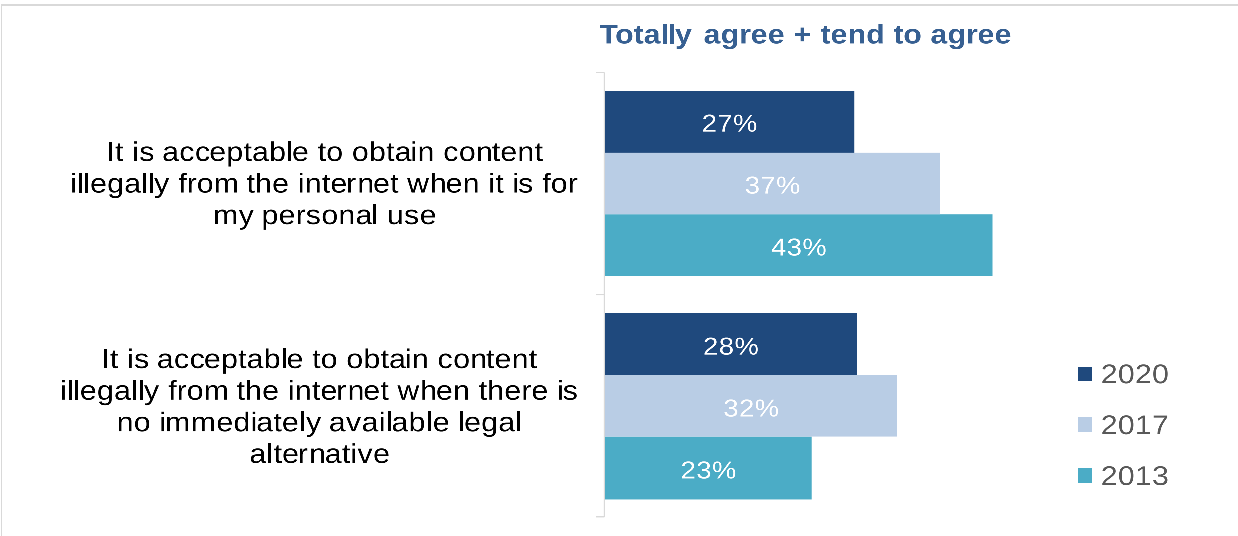
Figure 16: Attitude towards pirated online content (54)



It is important to note that the share of those who ‘totally’ or ‘tend to’ agree that it is acceptable to obtain pirated online content for personal use has decreased substantially over the years, from 43 % in 2013 to 27 % in 2020 (- 15pp) (see Figure 17). This change is particularly striking for young people aged between 15 and 24, for whom the proportion who agree (‘totally’ or who ‘tend to agree’) that it is acceptable to obtain pirated online content for personal use declined from 59 % in 2013 to 41 % in 2020 (- 19pp).

The proportion who agree that it is acceptable to obtain content illegally from the internet when there is no immediately available legal alternative has also declined, from 32 % in 2017 to 28 % in 2020 (- 4pp). However, this figure remains higher than in 2013, when 23 % agreed that it is acceptable to obtain content illegally from the internet when there is no immediately available legal alternative.

Figure 17: Attitude towards pirated online content – evolution (55)



At country level, there are substantial differences in attitudes towards pirated online content. The proportion who ‘totally agree’ or ‘tend to agree’ that it is acceptable to obtain content illegally from the internet when

(54) Source: Q3: Please tell me if you totally agree, tend to agree, agree, tend to disagree or totally disagree with the following statements: (Total base; n= 25 636). TREND QUESTION.
(55) Source: Q3: Please tell me if you totally agree, tend to agree, agree, tend to disagree or totally disagree with the following statements: It is acceptable to obtain content illegally from the internet when it is for my personal use (Total base; n= 25 636). TREND QUESTION.

it is for personal use, varies between 46 % in Latvia and Slovenia and 13 % in Denmark (see Table 4). The share who agree (‘totally’ or who ‘tend to agree’) that it is acceptable to obtain content from the internet illegally when there is no immediately available legal alternative, ranges from 50 % in Bulgaria to 20 % in Finland.

Table 4: Attitudes towards pirated online content per country

It is acceptable to obtain content illegally from the internet when there is no immediately available legal alternative	
	Totally + tend to agree*
BG	50 % (+4)
LV	48 % (+3)
NL	44 % (-5)
HR	40 % (+1)
LT	38 % (-1)
ES	36 % (-3)
CY	36 % (-2)
RO	35 % (+5)
SI	35 % (-5)
EL	34 % (-8)
LU	32 % (-2)
EE	32 % (-5)
PT	31 % (-4)
CZ	31 % (-9)
HU	31 % (+6)
BE	30 % (-10)
MT	30 % (+1)
PL	30 % (-4)
SK	30 % (-13)
IE	29 % (+2)
EU27	28 % (-4)
SE	28 % (+3)
AT	27 % (=)
DK	23 % (-2)
FR	22 % (-12)
DE	21 % (-1)
IT	21 % (-8)
FI	20 % (-8)

It is acceptable to obtain content illegally from the internet when it is for my personal use	
	Totally + tend to agree*
LV	46 % (-4)
SI	46 % (-9)
EE	42 % (-10)
CZ	41 % (-13)
BE	40 % (-4)
PL	40 % (-21)
HR	40 % (-1)
BG	38 % (-4)
LT	38 % (-3)
LU	36 % (-3)
SK	36 % (-16)
FR	31 % (-8)
PT	31 % (=)
HU	31 % (-5)
AT	30 % (-4)
RO	30 % (+4)
MT	29 % (-5)
SE	28 % (-1)
EU27	27 % (-10)
FI	27 % (-13)
IT	26 % (-2)
CY	26 % (-11)
IE	25 % (+2)
ES	24 % (-18)
NL	23 % (-23)
EL	22 % (-12)
DE	17 % (-10)
DK	13 % (-9%)

* Difference with 2017 in brackets, in percentage points.

4.1 CONSUMPTION OF PIRATED ONLINE CONTENT

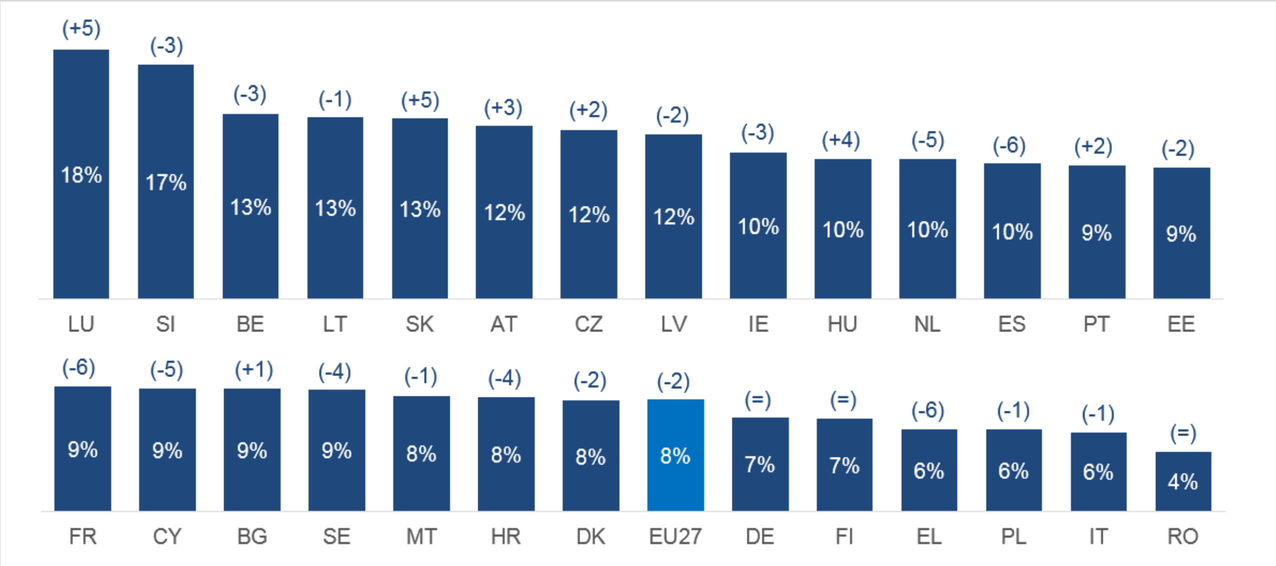
Recent studies from across the world have noted a decrease in the proportion of the population using pirated online content (see Section 1.2) (56). This development is also visible in the current survey, though differences with previous years are small. In 2020, 8 % of Europeans surveyed confess to having accessed, downloaded or streamed content from illegal online sources intentionally over the last 12 months, somewhat lower than in 2017 and 2013 (- 2pp).

Figure 18: Accessed, downloaded or streamed content from illegal online sources intentionally (57)

The proportion of Europeans who confess to having accessed, downloaded or streamed content from illegal online sources intentionally over the last 12 months ranges from 18 % in Luxembourg and 17 % in Slovenia, to 6 % in Greece, Poland and Italy, and only 4 % in Romania. Compared to 2017, the proportion admitting to having accessed content from illegal online sources intentionally clearly increased in Luxembourg and Slovakia (+ 5pp in both countries), though a notable decrease is observed in Spain, France and Greece (- 6pp in all three countries).

(56) Note that this does not necessarily imply that the overall consumption of pirated online content is on the decline, as a smaller group of 'heavy offenders' might use more content from illegal online sources in absolute terms. Some existing studies suggest this is the case, see Section 1.2.
(57) Source: Q4b: During the past 12 months, which of the following have you done? – Accessed, downloaded or streamed content from illegal online sources intentionally (Total base; n= 25 636). TREND QUESTION.

Figure 19: Accessed content from illegal online sources intentionally per country ([58])



* Difference with 2017 in brackets, in percentage points.

Who uses pirated online content? Among the Europeans surveyed, the intentional use of pirated online content is much higher than average (23 %) for those aged between 15 and 24, though the figure for this age group is notably lower than that observed in 2017, when 29 % of 15 to 24 year-olds admitted this behaviour. In line with this finding, the use of pirated online content is also higher among other socio-demographic groups with a relatively lower average age, including students and people living in larger households (the latter often being children). ‘Heavy online content users’ (see Section 1.1) are also more likely to have used pirated online content, with 17 % of this age group reporting to have obtained content from illegal online sources intentionally. As noted in Chapter 3, people who intentionally access online content from illegal sources also often buy counterfeit goods and vice versa, suggesting that this kind of behaviour overlaps to a substantial degree.

Table 5: Profile of those accessing illegal online content intentionally

Variable	Accessed pirated online content intentionally
Gender	
Male	10 %
Female	6 %
Age	
15-24 years	23 %
25-39 years	12 %
40-54 years	5 %
55+years	3 %
Age when left full-time education	
15 years	3 %

([58]) Source: Q4b: During the past 12 months, which of the following have you done? – Accessed, downloaded or streamed content from illegal online sources intentionally (Total base; n= 25 636). TREND QUESTION.

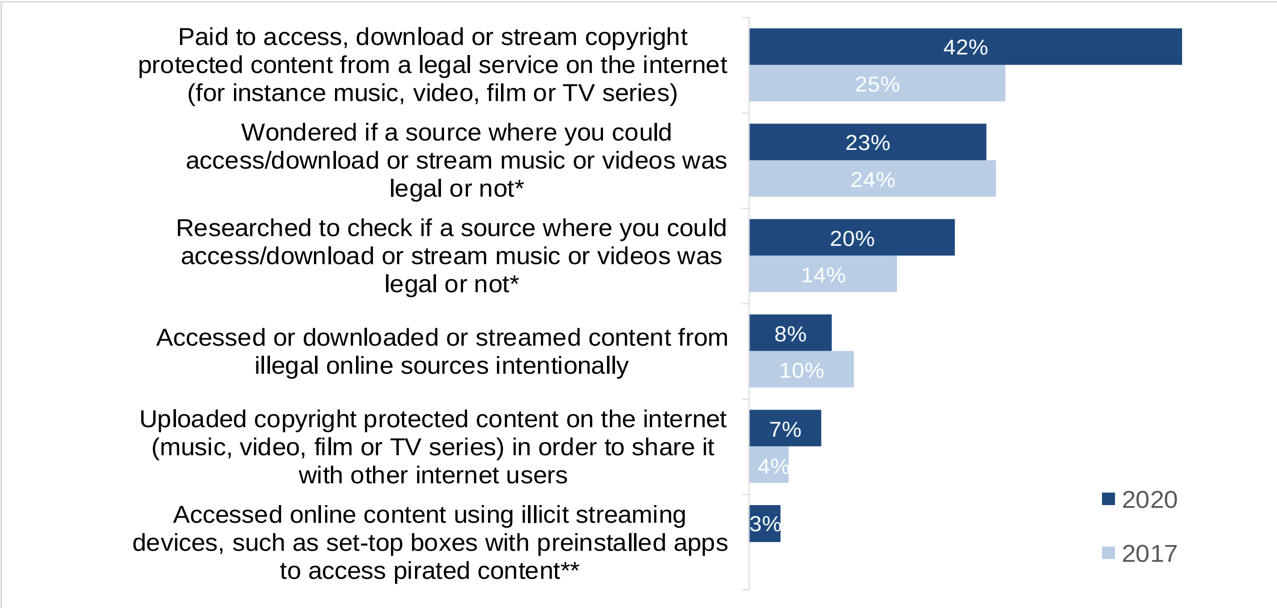
Variable	Accessed pirated online content intentionally
16-19 years	6 %
20+years	6 %
Still studying	23 %
No full-time education	12 %
Occupational status	
Self-employed	8 %
Employee	7 %
Manual worker	9 %
Without a professional activity	9 %
Urbanisation level	
Rural area or village	6 %
Small or middle-sized town	7 %
Large town	10 %
Household size	
1 person	6 %
2 persons	6 %
3 persons	10 %
4+ persons	13 %
Online content use	
Heavy	17 %
Limited	6 %
None	2 %
Bought counterfeit products intentionally	
Yes	47 %
No	6 %

Compared to the use of pirated 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 less widespread, with only 7 % of Europeans surveyed acknowledging they had done this in the last 12 months. An even smaller number (3 %) admitted having used illicit streaming devices, such as set-top boxes with pre-installed apps, to access pirated content. However, both these illegal activities cannot be considered insignificant, as they have made substantial inroads among young people. Of those aged between 15 and 24, 15 % had uploaded copyright-protected content and 7 % had used illicit streaming devices.

A substantial and steady share of Europeans question whether online sources are legal or not. In 2020, 23 % wondered if a source where you can access/download or stream music or videos was legal, almost identical to the 24 % in 2017 ([59]). The proportion who research whether online content is from a legal source or not is increasing. In 2020, close to one fifth (20 %) researched to check if a source where you could access/download or stream music or videos was legal or not, compared to 14 % in 2017 (+ 6pp).

([59]) This question item was rephrased in 2020, adding ‘access’ and ‘stream’.

Figure 20: Consumption of pirated online content (60)



* Question item rephrased in 2020, adding 'access' and 'stream'.
** Question item new in 2020

As noted in the literature review (Section 1.2), many studies have reported a strong rise in the proportion of the population paying for legal sources of online content, a rise which is driven by an increase in the use of online subscription services, like Netflix or Spotify. The COVID-19 pandemic appears to have further reinforced the growth in consumption of online subscription services (61).

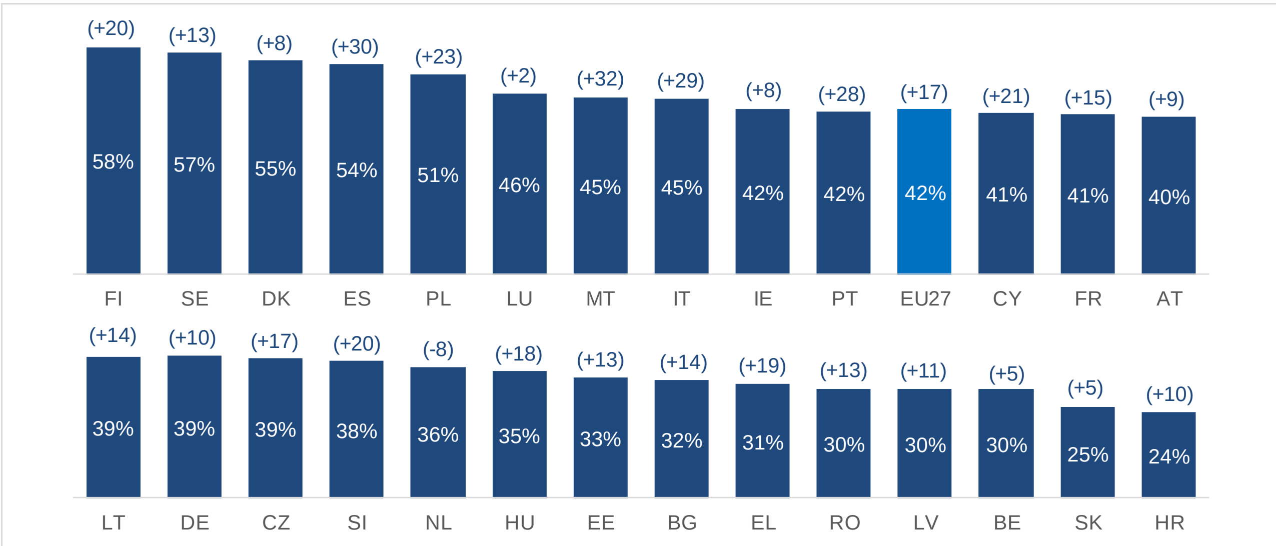
This development is also clearly visible in the current study. More than 4 out of 10 Europeans surveyed (42 %) indicated having paid to access, download or stream copyright-protected content from a legal service on the internet within the last year. This is a 69 % (+ 17pp) increase compared to 2017, when a quarter (25 %) reported having paid for online content (see Figure 21). Compared to 2013, this figure has more than doubled (+ 24pp). The proportion who have paid for online content is above average among respondents aged between 15 and 39; 57 % of this latter group having paid for online content.

(60) Source: Q4b: During the past 12 months, which of the following have you done? (Total base; n= 25 636). TREND QUESTION.
(61) See for example: https://www.digitaltveurope.com/2020/05/11/coronavirus-accelerates-global-svod-growth/

Figure 21: Paid for online content from a legal service (62)

The proportion of people paying for online content from a legal service varies significantly across countries (see Figure 22 below). In Finland, Sweden, Denmark, Spain and Poland, more than half of the people pay for online content from a legal service, while at the other end of the scale, in Bulgaria, Greece, Romania, Latvia, Belgium, Slovakia and Croatia, less than a third do so.

Figure 22: Paid for online content from a legal service per country (63)



* Difference with 2017 in brackets, in percentage points.

Previous studies have shown that people who use pirated content are frequently willing to pay for legal content (see Section 1.2) (64). This is confirmed by the current survey, which shows that those who

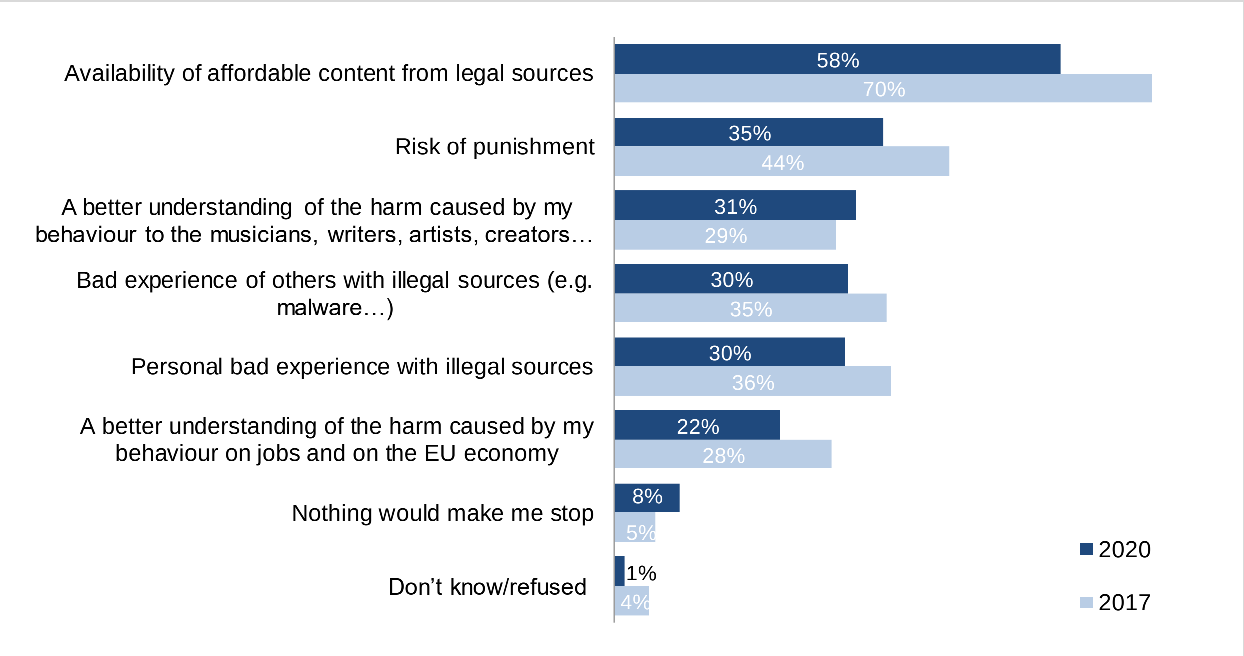
(62) Source: Q4b: During the past 12 months, which of the following have you done? - Paid to access, download or stream copyright-protected content from a legal service on the internet (for instance music, video, film or TV series (Total base; n= 25 636). TREND QUESTION.
(63) Source: Q4b: During the past 12 months, which of the following have you done? - Paid to access, download or stream copyright-protected content from a legal service on the internet (for instance music, video, film or TV series (Total base; n= 25 636). TREND QUESTION.
(64) See for instance the 'Global Online Piracy Study' by the University of Amsterdam, which concluded that pirates are more likely to be legal users of online content than non-pirates, with the median legal consumption of pirates typically being twice that of non-pirates. Available at: https://www.ivir.nl/publicaties/download/Global-Online-Piracy-Study.pdf

intentionally accessed online content from illegal sources, are relatively likely to have also purchased online content from legal sources, with 59 % of this group reporting that they paid to access, download or stream copyright-protected content from a legal service on the internet.

4.2 REASONS FOR USING, OR NOT USING, PIRATED ONLINE CONTENT

What would stop users of pirated online content? As can be observed in the figure below (Figure 23), the availability of affordable content from legal sources is the most common reason given to stop using pirated online content, with 58 % of those who have used content from illegal sources mentioning this [65]. This is followed by the risk of punishment and a better understanding of the harm caused to musicians, writers, artists, etc. – 35 % and 31 % respectively mention these as reasons to stop using pirated online content. As can be seen in the chart, compared to 2017, in 2020 the proportion citing that the availability of affordable content from legal sources would make them stop using pirated content is substantially lower (-12pp). This might be explained by the offer of affordable legal content being better nowadays (see also Chapter 5), making this a less obvious excuse for using illegal sources for online content.

Figure 23: What would make people stop using pirated online content [66]



For those who reported that they did **not** use pirated online content, the main driver behind their decision is the availability of affordable content from legal sources, with about half (48 %) of them mentioning this as a reason why they do not use pirated content. However, compared to those who **did** use pirated online content, those who did not are more likely to refer to the negative effects of online piracy. Notably, about half (48 %) of those not using pirated online content said it is because they understand that this behaviour harms musicians, writers, artists and creators. 4 out of 10 (40 %) of those not using pirated online content linked this to their understanding of the harm caused by their behaviour to jobs and the EU economy. This

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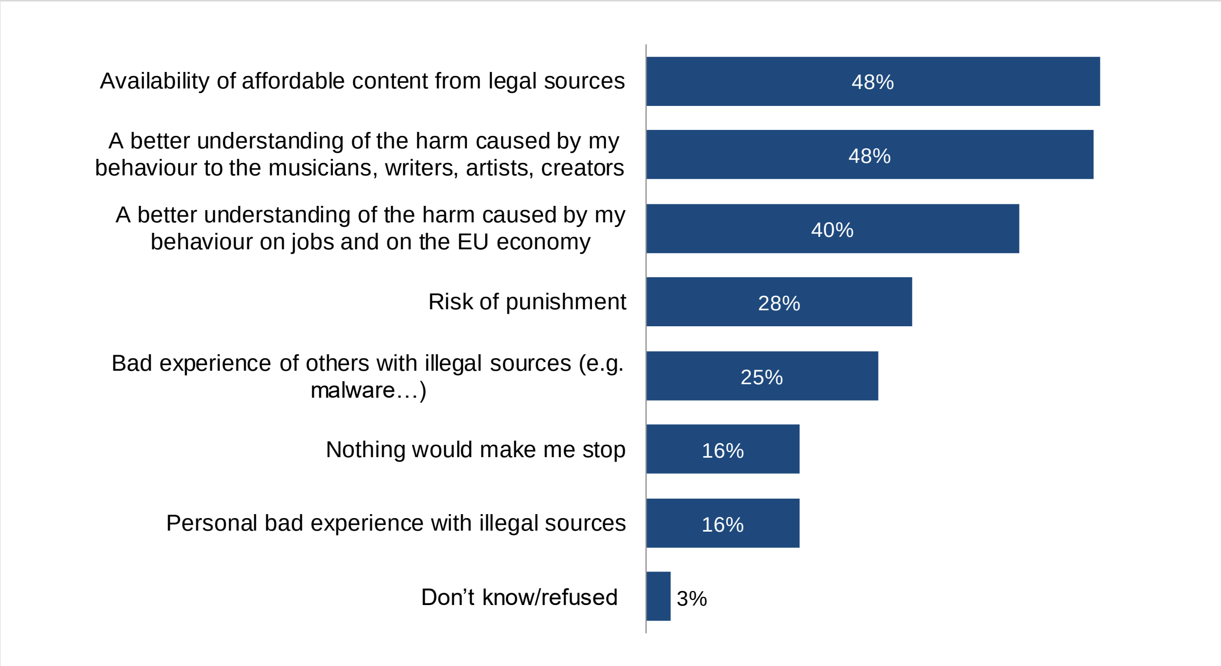
(65) This is in line with the findings in many other studies which show that the availability of affordable content from legal sources is the key driver for using pirated online content or not, see Section 1.2.
(66) Source: Q9a: You indicated that you had intentionally used illegal sources (websites) for online content during the past 12 months. What are all the elements that would make you stop using illegal sources? (Total base; n= 2 434). TREND QUESTION.

suggests that there is a relation between awareness of, and the use of, pirated online content, similar to the relation that is observed between awareness of, and the purchase of, counterfeit goods (see Section 3.3).

Figure 24: Reasons for **not** using pirated online content (67)



(67) Source: Q9b: You indicated that you have NOT used illegal sources (websites) intentionally for online content over the past 12 months. What was the reason for this? (Total base; n= 22680). NEW QUESTION.

5. LEGAL SOURCES OF ONLINE CONTENT – AWARENESS AND OPINIONS

Europeans' awareness of the availability of legal offers to access online content (68) in their country continues to rise. At least two-thirds are aware of the availability of legal offers to access films, music and TV series in their country. No matter the type of online content, awareness of legal offers is significantly higher now in 2020 than 3 years ago, reflecting a continuing growth in legal offers to access digital content on the market.

Europeans appear to have a clear preference for legal online content, if reasonably priced. The clear majority (89 %) 'totally agree' or 'tend to agree' with the statement 'Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms and do not access/download/stream illegally'.

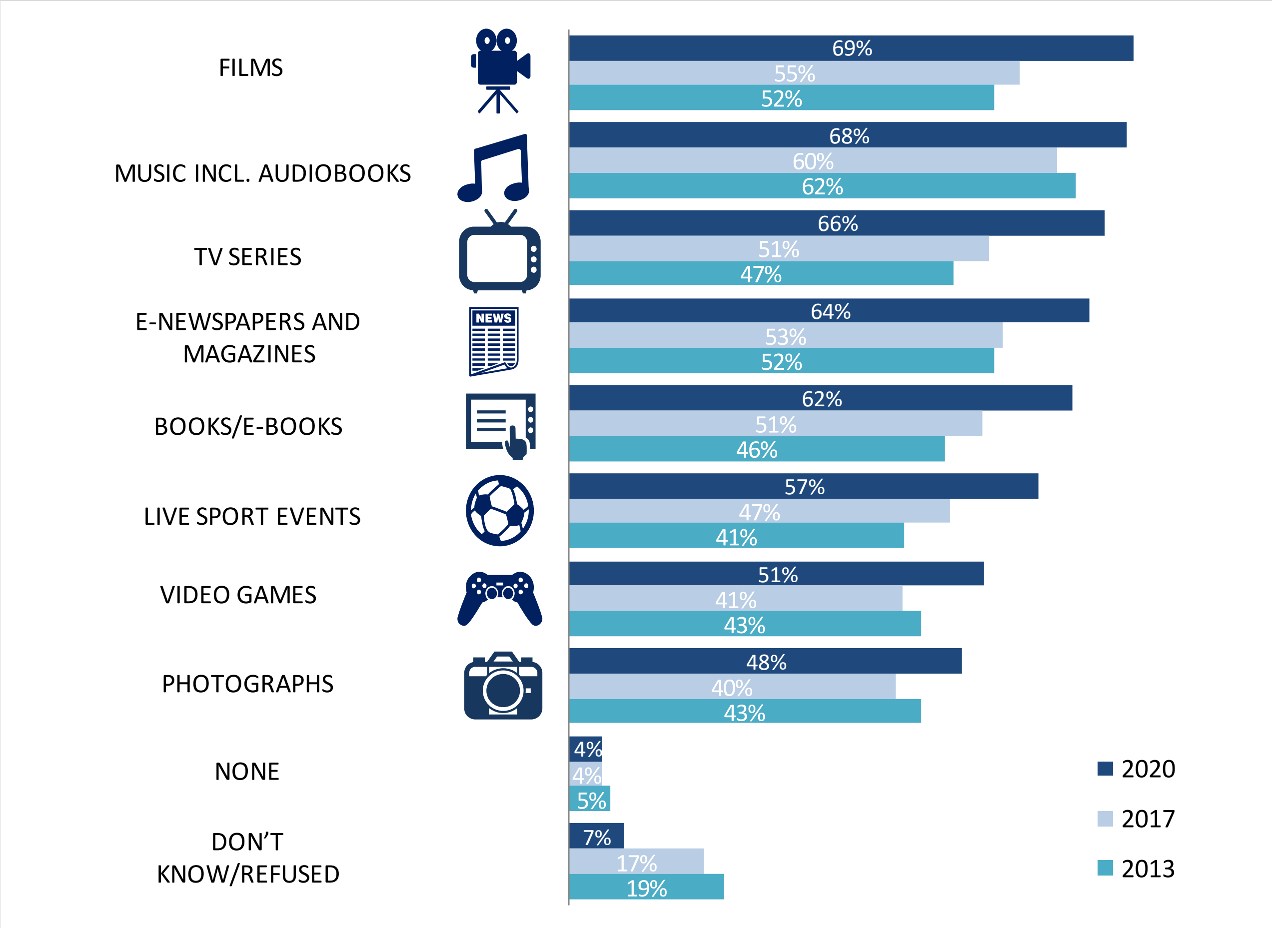
There is a significant rise in the proportion agreeing that the quality (+ 22pp) and diversity (+ 14pp) of the content offered is better through legal services compared to illegal sources since the first study in this survey in 2013. This is also the case in relation to the preference for using legal sources, if affordable, but is not as pronounced (+ 9pp).

5.1 AWARENESS OF LEGAL OFFERS

Continuing the trend observed in the previous study, Europeans' awareness of legal offers to access online content (69) in their country is relatively high. At least two-thirds are aware of the availability of legal offers to access films, music and TV series in their country. No matter the type of online content, awareness of legal offers is significantly higher now in 2020 than 3 years ago, reflecting a continuing growth in legal offers to access digital content on the market.

(68) Source: 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?
(69) Source: 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?

Figure 25: Awareness of legal offers (70)



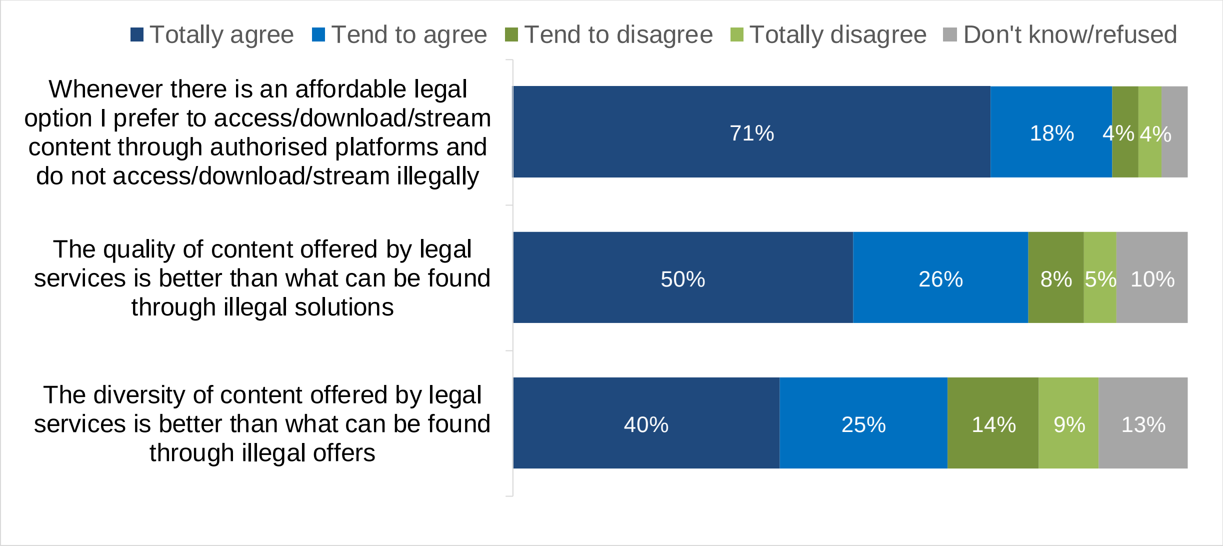
These figures on the awareness of the availability of legal offers are related to people's personal characteristics, with the younger age groups being more aware of legal offers for music, films, TV series and video games, whilst those who are older (55+years) are least likely to be aware of these types of legal offers. Awareness is also lower among those who have only reached a low level of education, those who don't live in a large town, those who do not work, and those who are either not online or are not heavy internet users.

5.2 OPINIONS ON LEGAL OFFERS

The survey not only covers how aware the general public is about the availability of legal offers in their country, it also gauges their opinions about what might drive preferences for these legal offers.

(70) Source: 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= 25636)

Figure 26: Opinions on legal offers (71)



Europeans appear to have a clear preference for legal online content, if reasonably priced. The clear majority (89 %) 'totally agree' or 'tend to agree' with the statement 'Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms and do not access/download/stream illegally'. The preference for affordable legal online content was visible across socio-demographic groups. However, those who left education before they were 15 were less likely to agree with this statement (78 % agreed) compared to 91 % of those with the highest level of education (aged 20+).

Opinions are also positive regarding the **quality** and **diversity** of content offered by legal services. Notably, more than three quarters (76 %) 'totally agree' or 'tend to agree' that the quality of content offered by legal services is better than what can be found through illegal solutions. Contrary to what was observed in the two earlier studies in the survey, the belief that the quality of content offered by lawful services is better than what can be found through illegal sources is also no longer a statement associated more with the younger demographics (72). Breaking this down by age group shows the similarities across the different age groups; 75 % agreed among those aged 15-24, 78 % among those aged 25-39, 80 % among those aged 40-54 and 73 % among those aged 55+. Though the older age group were also more likely to say that they 'didn't know' or to refuse to answer the question about the quality of legal offers.

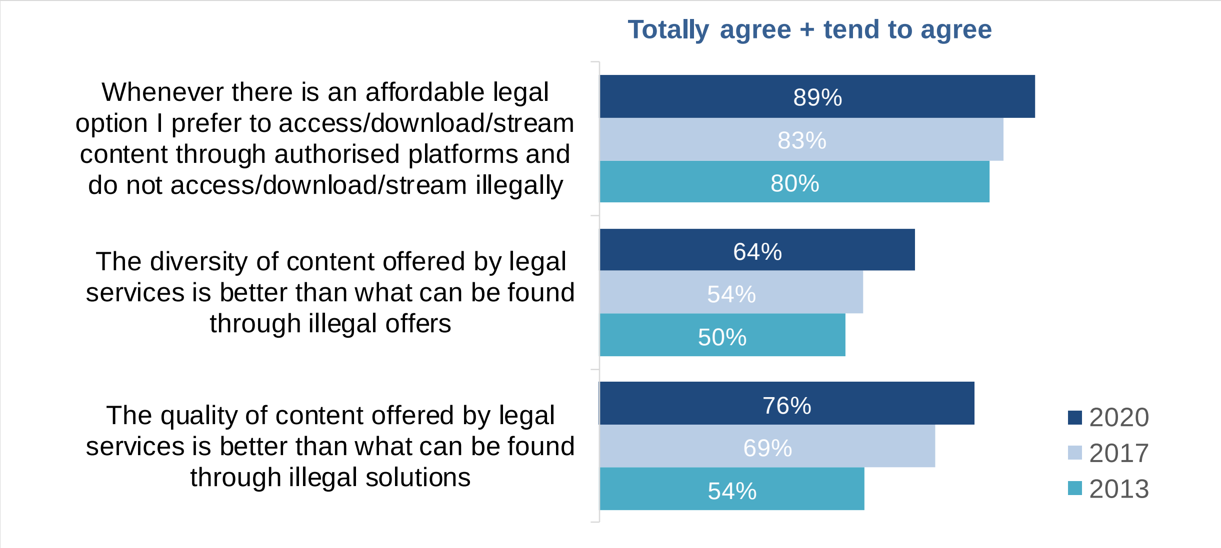
Those with a higher level of education are more likely to be of the opinion that the quality of content offered by legal services is better than those from illegal sources – 77 % of Europeans with the highest level of education say legal services offer high quality content compared to 69 % of those who finished their education before age 15.

The greater **diversity** of the content offered by legal services compared to what can be found through illegal offers is less compelling in comparison, though a majority of 64 % still agreed with this statement. This is fairly stable across the different socio-demographic profiles.

(71) Source: Q7: For each of the following statements regarding legal offers providing access to content such as music and films on the internet, please indicate whether you totally agree, tend to agree, tend to disagree, totally disagree: (Total base; n= 25636). TREND QUESTION.
(72) In 2017, 75 % of those aged 15-24 totally agreed or tended to agree that the quality of content offered by legal services is better than what can be found through illegal sources, whereas just 64 % of those aged 55 and older totally agreed or tended to agree with this statement.

Noticeably, there is a significant rise in the proportion agreeing that the quality is better through legal services compared to illegal sources since the first study in this survey in 2013. The proportion who showed a preference for legal online content, if affordable, has also increased over the years by 9 %. However, it is not as dramatic as the rise since 2013 in the percentage of those that agree that the quality (+ 22pp) and diversity (+ 14pp) of content offered by legal services is better than what can be found through illegal sources.

Figure 27: Opinions on legal offers, trend since 2013 ([73])



The analysis also investigated the online behaviour of the general public in Europe and their opinions related to the affordability, quality and diversity of the legal options over the illegal options to access digital content. Looking at those who have paid for legal online content compared to those who have not, it is clear that those who have paid are more likely to agree that the quality is better on legal services (81 % compared to 73 %) and to prefer legal options when affordable (94 % compared to 86 %). However, those who have paid for legal online content are no more convinced that the diversity of the content offered by these legal services is better compared to those who have not paid for legal online content (65 % compared to 64 %).

On the flip side, those who have intentionally accessed online content illegally are less likely to agree with the positive statements about legal offers – 67 % agree that the quality of content through legal services is better (compared to the average of 76 %), 47 % agree that the diversity of content is better through legal services (compared to 64 % on average). Whilst those who have intentionally accessed online content illegally are less likely to say that they prefer content from legal sources, if affordable, compared to those who have accessed online content legally, the gap between the two groups is smaller at 82 % compared to 89 % on average.

([73]) Source: Q7: For each of the following statements regarding legal offers providing access to content such as music and films on the internet, please indicate whether you totally agree, tend to agree, tend to disagree, totally disagree: (Total base; n= 25636). TREND QUESTION.

CONCLUSION

Intellectual property – Awareness and opinions

Are EU citizens aware of IP and its advantages to society and themselves? At first sight, the answer is affirmative. EU citizens' subjective or 'self-declared' understanding of IP remains high at 80 % (+ 2pp compared to 2017). And many Europeans acknowledge IP's potential benefits to society. Almost all (98 %) 'totally agree' or 'tend to agree' that it is important that inventors, creators and performing artists are able to protect their rights and be paid for their work. Only a slightly smaller proportion (90 %) agree that IP contributes to improving and guaranteeing the quality of products and services.

An important finding is that subjective awareness of IP is considerably below average among those who bought counterfeit goods (70 %) or intentionally accessed pirated online content (73 %). This suggests that that those with little understanding of IP are more likely to infringe it, showing the potential benefits of promoting awareness of IP among the public. There is still room for improvement here, as IP remains an ambiguous topic for many Europeans, similar to what was reported in the IP Perception survey's previous studies. Few Europeans (4 %, - 1pp compared to 2017) list consumers like themselves among those who benefit most from IP. Many more (21 %) still believe that IP mainly benefits the 'elite', such as famous performing artists – the same proportion as in 2017.

Nonetheless, positive trends can be observed. The share of Europeans who think that IP is most beneficial to the creators of artistic content has doubled, from 10 % in 2017 to 20 % in 2020, although it should be stressed that two more categories were added to this question item in 2020 ('authors/writers' and 'filmmakers'). Moreover, the share of those answering that large firms benefit the most from IP declined substantially compared to 2017, from 24 % to 15 %.

Counterfeit goods – Opinions and consumption

Europeans are generally aware of the negative effects of counterfeit goods on the economy and health and safety. More than 8 out of 10 (83 %) agree that buying counterfeit goods ruins businesses and jobs. 7 out of 10 (71 %) agree that buying counterfeit products poses a threat to health and safety. Furthermore, only a small minority of EU citizens see valid reasons for buying counterfeit goods. Only 15 % of Europeans agree that it is acceptable to buy luxury counterfeit products. Only slightly more (19 % to 24 %) agree that it is acceptable to buy counterfeit products when the quality of the product does not matter, when the original product is not (or not yet) available where you live, or when the price of the original, authentic product is too high. These figures have generally improved compared to 2017.

Does this translate into a decrease in the proportion of people who are buying counterfeit goods? This is difficult to say, as no clear trend can be observed. Over the last 3 years the proportion of Europeans who admit to having intentionally purchased counterfeit goods during the previous 12 months has declined slightly, from 7 % in 2017 to 5 % in 2020. Compared to 2013, however, it has hardly changed (4 %). Younger people are more likely to admit having purchased counterfeits intentionally (10 % of those aged 15 to 24 admitted this), although their over-representation is much less pronounced than in the case for pirated online content (see below).

It should be borne in mind that the above only tells us about the **admitted** and **intentional** buying of counterfeits. The available evidence, both from the current survey and other studies, suggests that the actual proportion of people who buy counterfeits is substantially higher than reported above, as people are tricked into buying counterfeits, or are unsure whether products they have bought are genuine or not. In the current survey, a third of Europeans (33 %) wondered during the last 12 months whether a product they had bought was original or not, down from 37 % in 2017. About 1 out of 10 (9 %) was misled into buying counterfeits during the previous year, a figure that has remained more or less stable since 2017 (- 1pp).

In people's decision to buy counterfeit goods or not, the availability of affordable genuine products plays a crucial role. About half (52 %) of those buying counterfeits say the availability of affordable genuine products would make them stop buying counterfeits. Interestingly, reputational damage is also becoming a more compelling reason to stop buying counterfeits, with more respondents (17 %; + 5pp) saying they would not buy counterfeits because this may harm their image. This suggests that buying or possessing counterfeits is increasingly frowned upon by society.

Pirated online content – Opinions and consumption

While Europeans generally condemn the use of pirated online content, slightly more than a quarter still agree that it is acceptable to obtain pirated online content when there is no immediately available legal alternative or when it is for personal use. The upside is that the acceptance of using pirated online content for personal use is clearly dropping (- 15pp since 2013).

It is also encouraging that Europeans are increasingly paying for legal sources of online content. More than 4 out of 10 Europeans surveyed (42 %) had paid to access, download or stream copyright-protected content from a legal service on the internet over the last 12 months, a very significant (+ 17pp) increase since 2017. Compared to 2013, this proportion has more than doubled (+ 24pp). It is likely that this is related to the quick growth in the availability and use of online subscription services for digital content, such as Netflix and Spotify, which has been reported in many existing studies and has only been reinforced by the COVID-19 pandemic.

Does the increasing readiness to pay for legal sources of online content translate into a lower number of 'online pirates' in the EU, as may be expected, based on the results from other surveys (see Section 1.2)? The results of the survey suggest that this is indeed the case, although to a limited extent. About 1 out of 10 Europeans surveyed (8 %) admitted to having intentionally accessed online content through illegal sources during the last 12 months, somewhat below the figures reported in 2017 and 2013 (- 2pp). However, it cannot be concluded from this that there is less online piracy on an aggregate level, as a lower number of 'heavy offenders' may consume more online content obtained via illegal sources.

As has been shown before in many other surveys, including by the EUIPO, the proportion of younger people using pirated online content is significantly higher than average. Of those aged between 15 and 24, 23 % admitted the intentional use of pirated online content. Young people are also more likely to use novel technologies to obtain online content illegally, such as by means of illicit streaming devices. Of those aged 15 to 24, 7 % had used these devices in the previous 12 months, compared to 3 % of the population as a whole. While this is still a small proportion of the population, it should serve as a warning for the future, considering the much higher use of illicit streaming devices and other novel technologies to obtain online content illegally also found in other, non-European surveys.

Interestingly, those who intentionally accessed online content from illegal sources, are relatively likely to have also purchased online content from legal sources, with 59 % of this group reporting that they paid to access, download or stream copyright-protected content from a legal service on the internet. This suggests that people who use pirated content are willing to pay for legal content (at least if it is reasonably priced), a finding that is supported by other studies.

The availability of affordable content from legal sources is the most common reason given to stop using pirated online content, with 58 % of those who have used content from illegal sources mentioning this as a reason to stop. This is followed by the risk of punishment and a better understanding of the harm caused to musicians, writers, artists, etc. –35 % and 31 % respectively mention these as reasons to stop using illegal sources of online content. Since 2017, the proportion citing that the availability of affordable content from legal sources would make them stop using pirated content has declined substantially (- 12pp). It is likely that this is related to the increased legal offers (see below), making 'availability' a less obvious 'excuse' for accessing pirated online content.

Legal sources of online content – Awareness and opinions

Europeans’ awareness of the availability of legal offers to access online content in their country continues to rise, reflecting the widely reported growth in the market for subscription services for online content. Currently, at least two-thirds are aware of the availability of legal offers to access films, music and TV series in their country. No matter the type of online content, awareness of legal offers is significantly higher now in 2020 compared to 3 years ago.

The increasing awareness about the availability of legal offers coincides with an increasing appreciation for what is on offer. There is a significant rise in the proportion of those who agreed that the quality (+ 22pp) and diversity (+ 14pp) of content offered is better through legal services compared to illegal sources since the first study in this survey in 2013.

Does the increased awareness and appreciation of legal offers drive the observed increase in the number of Europeans who pay for online content? This does not appear unlikely, based on the fact that the great majority of Europeans (89 %) ‘totally agree’ or ‘tend to agree’ with the statement ‘Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms and do not access/download/stream illegally’.

ANNEX 1: QUESTIONNAIRE

During the past 3 months, which of the following have you done? [SINGLE ANSWER]

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 tablet or smart phone)
8. None
9. Don't know/refused

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" [SINGLE ANSWER]

1. Very good
2. Rather good
3. Rather poor
4. Very poor
9. Don't know/refused

Q2 [SINGLE RESPONSE, RANDOMISE OPTION 1-9]
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, <u>who benefits the most</u> from the protection of intellectual property?

1. Consumers like yourself
2. Big companies
3. Small and medium companies
4. Famous performing artists (musicians, singers, actors)
5. Less well-known performing artists (musicians, singers, actors)
6. Inventors
7. Creators of artistic content like photographers, sculptors, painters, authors/writers, filmmakers
8. Politicians
9. Website, app and video game developers
10. None
999. Don't know/refused

Q3 [SINGLE PROGRESSIVE GRID]
Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statements:

Rows [RANDOMISE]
1. It is acceptable to purchase counterfeit products when the price for the original and authentic product is too high
2. It is acceptable to buy counterfeit products when the original product is not or not yet available where you live
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 when there is no immediately available legal alternative
6. It is acceptable to obtain content illegally from the internet when it is for my personal use
7. Buying counterfeit products ruins businesses and jobs
8. Buying counterfeit products supports child labour and illegal trafficking
9. Buying counterfeit products poses a threat to health and safety
10. Buying counterfeit products is an act of protest and a way to resist to the market driven economy and the large premium brands
11. It is acceptable to obtain content illegally from the internet when the price for the original and authentic content is too high
12. Obtaining illegal online content such as music, video, film or TV series exposes you to harmful practices such as scams, computer viruses or inappropriate content for minors

Columns

1. Totally agree
2. Tend to agree
3. Tend to disagree
4. Totally disagree
9. Don’t know/refused

Q4a [SINGLE PROGRESSIVE GRID]
During the past 12 months, which of the following have you done?

Rows [RANDOMISE]

1. Bought counterfeit products intentionally
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
9. Don’t know/refused

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 (for instance music, video, film or TV series)
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 pre-installed apps to access pirated content

Columns

1. Yes
2. No
9. Don’t know/refused

Q5 [SINGLE PROGRESSIVE GRID]

Please indicate whether you totally agree, tend to agree, tend to disagree or totally disagree with each of the following statements:

Rows [RANDOMISE]

1. Protecting 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. Protecting Intellectual Property is important because it contributes to improving and guaranteeing the quality of products and services
3. If there was no longer any Intellectual Property protection, there would be economic chaos
4. It is important that inventors, 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
7. The Intellectual Property principles are not adapted to the internet

Columns

1. Totally agree
2. Tend to agree
3. Tend to disagree
4. Totally disagree
9. Don’t know/refused

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?

1. Music (This also includes audio books)
2. Films
3. TV series
4. Live sports events
5. Books (This also includes E-books)
6. Newspapers (This also includes E-newspapers and magazines)
7. Photographs
8. Video games (This also includes App games to be played on tablet or smart phone)
9. None
999. Don’t know/refused

Q7 [SINGLE PROGRESSIVE GRID]
For each of the following statements regarding legal offers providing access to content such as music and films on the internet, please indicate whether you totally agree, tend to agree, tend to disagree, totally disagree:

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

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

Base: IF Q4a_1=1
Q8a [MULTIPLE ANSWER, RANDOMISE OPTIONS 1-7]
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?

1. Risk of punishment
2. Personal bad experience with 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
5. Availability of affordable original products
6. A better understanding of the harm caused by my behaviour on jobs and on the EU economy
7. A better understanding of the harm caused by my behaviour to the producers of the original products
8. Nothing would make me stop
9. Don't know/refused

Base: IF Q4a_1=2
Q8b [MULTIPLE ANSWER, RANDOMISE OPTIONS 1-7]
You indicated that you have <u>NOT</u> intentionally bought counterfeit products during the past 12 months.

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

1. Risk of punishment
2. Personal bad experience with 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
5. Availability of affordable original products
6. A better understanding of the harm caused by my behaviour on jobs and on the EU economy
7. A better understanding of the harm caused by my behaviour to the producers of the original products
8. No specific reason [SINGLE ANSWER]
9. Don't know/refused

Base: IF Q4b_1=1

Q9a **[MULTIPLE ANSWER, RANDOMISE OPTIONS 1-6]**
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 punishment
2. Personal bad experience with illegal sources
3. Bad experience of others with illegal sources (e.g. malware…)
4. Availability of affordable 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 on jobs and on the EU economy
7. Nothing would make me stop **[SINGLE ANSWER]**
9. Don't know/refused **[SINGLE ANSWER]**

Base: IF Q4b_1=2

Q9b **[MULTIPLE ANSWER, RANDOMISE OPTIONS 1-6]**
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 punishment
2. Personal bad experience with illegal sources
3. Bad experience of others with illegal sources (e.g. malware…)
4. Availability of affordable 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 on jobs/on the EU economy
7. No specific reason **[SINGLE ANSWER]**
9. Don't know/refused **[SINGLE ANSWER]**

VI. SOCIO-DEMOGRAPHIC QUESTIONS

D5 **[SINGLE ANSWER]**
How old were you when you stopped full-time education?

1. 15-
2. 16-19
3. 20+
4. Still Studying
5. No full-time education
9. Don't know/refused

D6 **[SINGLE ANSWER]**
As far as your current occupation is concerned, would you say you are self-employed, an employee, a manual worker or would you say that you are without a professional activity? Does it mean that you are a…

Self employed
1. Farmer, forester, fisherman
2. Owner of shop, craftsman
3. Professional (lawyer, medical practitioner, accountant, arch
4. Manager of a company
5. Other (Self-employed)

Employee
6. Professional (employed doctor, lawyer, accountant, architect
7. General management, director or top management
8. Middle management
9. Civil servant
10. Office clerk
11. Other employee (salesman, nurse, ...)
12. Other (Employee)

Manual worker
13. Supervisor\ foreman (team manager, ...)
14. Manual worker
15. Unskilled manual worker
16. Other (Manual worker)

Without a professional activity
17. Looking after the home
18. Student (full time)
19. Retired
20. Seeking a job
21. Other (Without a professional activity)

99. Don’t know/refused

D7 **[SINGLE ANSWER]**
In which region do you currently live?
99. Don’t know/refused

D8 **[SINGLE ANSWER]**
Would you say that you live in….?
Interviewer instruction: *Read all answers except DK – one answer only*

1. Rural area or village
2. Small or middle-sized town
3. Large town
99. Don’t know/refused **Interviewer instruction:** *Do not read out*

D9 **[Q, MIN 1, MAX 15]**
How many people aged 15 and older usually live in your household? Please include yourself.

ANNEX 2: LITERATURE REVIEW STUDIES

Name of study/survey (year of release)	Author	Coverage
Global Online Piracy Study (2018)	Institute for Information Law, University of Amsterdam	Worldwide (France, Germany, Netherlands, Poland, Spain, Sweden, UK, Brazil, Canada, Hong Kong, Indonesia, Japan and Thailand)
Global Consumer Piracy Survey (2017)	Irdeto	Worldwide (Argentina, Australia, Austria, Brazil, China, Colombia, Denmark, Egypt, GCC (GCC region cluster comprised of Saudi Arabia, UAE, Kuwait, Qatar, Bahrain and Oman), Germany, India, Indonesia, Italy, Mexico, Poland, Portugal, Romania, Russia, Spain, Sweden, Switzerland, Turkey, Ukraine, UK and US.
Social media: Insights into consumer shopping behaviour (2019)	Vitreous Worldwide	Worldwide (cross section of countries, including the UK., US, Germany, France and Italy)
Music Listening 2019 (2019)	International Federation of the Phonographic Industry (IFPI)	Worldwide (Argentina, Australia, Brazil, Canada, France, Germany, Italy, Japan, Mexico, Netherlands, New Zealand, Poland, Russia, South Africa, South Korea, Spain, Sweden, the UK and the US), plus China and India (not included in “global” figures).
Gen Z Insights: Brands and Counterfeit Products (2019)	International Trademark Association (INTA)	Worldwide (Argentina, China, India, Indonesia, Italy, Japan, Mexico, Nigeria, Russia, United States)
MarkMonitor Online Shopping Barometer q4 2018 (2018)	MarkMonitor	Worldwide (UK, US, Germany, France and Italy)
Combatting illicit trade consumer motivations and Stakeholder perspectives (2018)	Oxford Economics	Worldwide (Austria, Azerbaijan, Belarus, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Kazakhstan, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, Ukraine)

Name of study/survey (year of release)	Author	Coverage
Global Software Survey (2018)	BSA | The Software Alliance	Worldwide (32 countries, not specified)
Study of Online Consumption of Copyrighted Content: Attitudes Toward and Prevalence of Copyright Infringement in Canada (2018)	Science and Economic Development Canada	National (Canada)
Counterfeit products are endemic – and it is damaging brand value (2019)	Incopro	National (UK)
Online Copyright Infringement Tracker Latest wave of research (March 2018)	UK Intellectual Property Office (IPO)	National (UK)
Counterfeit athletic footwear online (2018)	Red Points	National (US)
Busan Consumers' Perception of Counterfeit Products (2017)	The European Chamber of Commerce in Korea (ECCK)	National (South Korea)
University IP Policy: perception and practice how students and staff understand intellectual property policy at their HEI (2017)	Intellectual Property Awareness Network (IPAN)	National (UK)
Survey on Public Awareness of Intellectual Property Right Protection 2018 (2019)	Intellectual Property Department (The Government of the Hong Kong Special Administrative Region)	National (Hong Kong)
Jogvédett online tartalmak, hamisított termékek - kutatás a 18-26 éves fiatal felnőttek körében (2020)	National Board Against Counterfeiting (NBAC)	National (Hungary)
Indagine sulla contraffazione in Italia (Survey on counterfeiting in Italy) (2018)	Consumer Protection Association (Associazione per la tutela dei consumatori)	National (Italy)
La Pirateria nel mondo del libro [Piracy in the book world] (2020)	Italian Publishers Association (AIE)	National (Italy)
Entrepreneurs' perception, awareness and views of IPR protection (2019)	Latvian Patent Office	National (Latvia)

Name of study/survey (year of release)	Author	Coverage
Survey by the Ministry of Industry, Commerce and Tourism and the OEPM	Ministry of Industry, Commerce and Tourism and the OEPM	National (Spain)
Australian Piracy Behaviour and Attitudes (2019)	Creative Content Australia	National (Australia)
Le piratage en France [Piracy in France] (2018)	Ernst & Young	National (France)
Study of the online content viewing behaviour of Taiwanese consumers (2020)	Asia Video Industry Association's (AVIA) Coalition Against Piracy (CAP)	National (Taiwan)
Piracy observatory and digital content consumption habits 2018 (2019)	La Coalicion	National (Spain)
Consumer survey on online copyright infringement 2019 (2019)	Australian Government, Department of Communications and the Arts	National (Australia)
Inside the Mind of a Book Pirate (2018)	Digimarc Corporation	National (US)
Consommation de biens culturels dématérialisés en situation de confinement - Vague 2 [Consumption of online cultural content in a situation of confinement - Wave 2] (2020)	Hadopi	National (France)
[PRV upphovsrättsundersökning 2019 [PRV Copyright Survey 2019] (2020)	PRV	National (Sweden)
Entrepreneurs' perception, awareness and views of IPR protection (2019)	Latvian Patent Office	National (Latvia)
Consumer Barometer (2020)	KPMG & IFH Köln	National (Germany)

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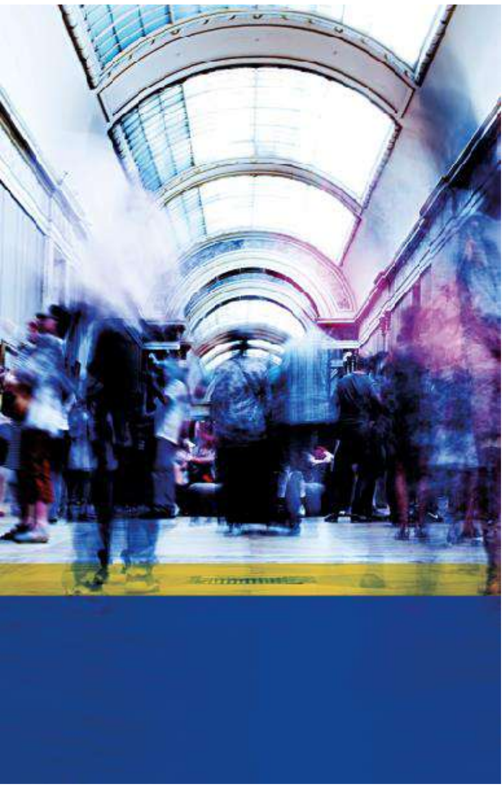

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