EUIPO
EUROPEAN UNION
INTELLECTUAL PROPERTY OFFICE

www.euipo.europa.eu

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

March 2016

www.euipo.europa.eu

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

REPORT
FIELDWORK: From 21 to 28 October 2016
PUBLICATION: 23 March 2017
This survey has been commissioned to Deloitte by the European Union Intellectual Property Office.

Table of Contents

FOREWORD

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

This survey updates the first perception study published by the Observatory in 2013, and provides further evidence of how IP rights (IPR) are perceived by EU citizens at a time when encouraging innovation and creativity is increasingly the focus of economic policy.

This EU wide study, covering residents in all EU Member States aged 15 years and over and bringing together the results of more than 26 000 interviews, confirms generally the global picture assessed in 2013. Even during a period of economic crisis when household budgets have come under pressure, 97 % of those surveyed agree that it is important that inventors, creators and performing artists can protect their rights and be paid for their work.

Moreover 70 % of Europeans surveyed believe that nothing can justify the purchase of counterfeit goods and 78 % consider that buying counterfeits ruins business and jobs. This latter point is supported by other studies carried out through the Observatory on the economic impact of IP rights and the damage caused by infringements to jobs and income in legitimate businesses.

A clear preference emerges for using legal means to access online content when an affordable option is available (83 %). A growing proportion, some 27 %, say they have paid to access digital content, which is 7 percentage points higher than in the previous study and 41 % of young people, are also buying online content using lawful channels, which is 8 percentage points higher than before.

However, in line with the 2013 results, people do not always act in line with their stated position. The key 15-24 age group seems to have become less convinced that fake goods are damaging and is buying more counterfeit goods, mainly for price reasons.

Among respondents admitting to using illegal sources, price and availability from legal sources prevail as the main drivers for such behaviour as 31% of respondents believe that it is acceptable to obtain content illegally when there is no immediately available legal alternative. However, even though about 69 % of citizens agree that lawful services offer higher quality content only 54% consider they offer more diversity than illegal sources. The study showed that the level of illegal downloading or streaming of copyright material remains stable.

Furthermore, it is worth noting that citizens are more confused. Around 10% of respondents said they were misled when buying products, while 35 % were unsure if the product they had bought was genuine or counterfeit. With regard to downloading or streaming, 24 % of respondents wondered if a source was legal and for young people the proportion who were confused on this question rose to 41 %.

These findings demonstrate the need for initiatives carried out by the Observatory such as the European Online Content Portal, agorateka, the Ideas Powered website, including the publication of Frequently Asked Questions on copyright, and the Office's support for the setting up of Europol's IPR Crime Coordination Centre, which, among other activities, pays particular attention to the phenomenon of online IPR infringements.

Overall, this latest study shows that support for IP rights continues to be high among citizens even though there is still room for improvement in helping young people in particular to understand the economic logic of IP and the social impact of infringements. Despite the growing use of legal offers, there still seems to be a perception that the market is not providing services that meet the expectations of this age group in terms of price and affordability.

Against this background, the trilogy of studies covering the economic contribution of IP to the EU; the perception of EU citizens; and the economic cost of infringement will continue to have a vital role to play in the years ahead, by providing policymakers, businesses and citizens with impartial facts on which to base the debate on the way forward.

António Campinos
EUIPO Executive Director

EXECUTIVE SUMMARY

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

In 2013, the European Union Intellectual Property Office commissioned the study, *European Citizens and Intellectual Property: Perception, Awareness and Behaviour*, to explore Europeans' attitudes towards IP; the degree to which Europeans respect these rights, and the concept as a whole. This study, which was conducted in 2016, gives an updated analysis and makes a comparison with the results of the 2013 study, based on a new quantitative survey and a literature review. It covers the population of the respective nationalities of the EU Member States, and residents in each of the 28 Member States aged 15 or over. In total, 26 555 interviews were carried out.

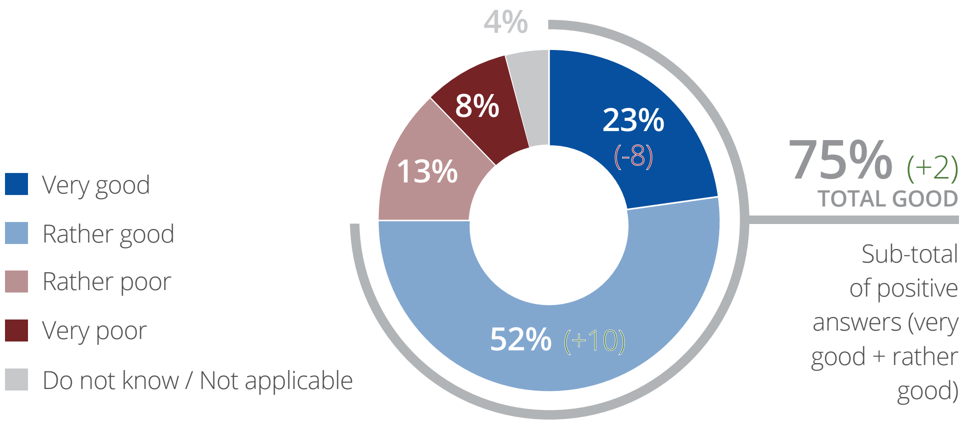
Eighty per cent of the questionnaire was similar to the 2013 study, in order to allow comparisons to be made with the 2013 results and thus to identify trends. New questions were integrated, in order to allow further exploration into perspectives that the 2013 survey had revealed and to follow their evolution.

EUROPEANS' AWARENESS OF, AND THEIR ATTITUDES TOWARDS IP

GENERAL SUBJECTIVE UNDERSTANDING OF IP INCREASES; HOWEVER, IT DECREASES AMONG THE YOUNGER GENERATION

Overall subjective understanding of IP increased compared with 2013; however, this overall increase hides some discrepancies. While the percentage of the Europeans surveyed who say they have a 'rather good' understanding of IP increased by 10 points, there appears to be a reduction in the level of understanding, as the proportion of respondents with a 'very good' understanding decreases.

Note: (+ xx) (–   x) (=) shows how the results have evolved since 2013

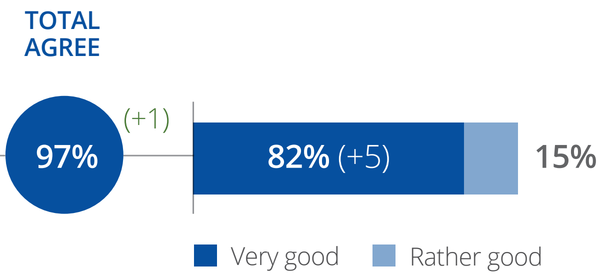


It is worth noting that the total 'good' understanding has increased since 2013 among participants aged 25 to 54 (+ 5 points) and remains steady among respondents who are 55 or over. However, among the youngest respondents, the picture is different. Just as in 2013, the youngest generation reports the lowest level of 'good' understanding in comparison with other age groups, and this level of understanding is decreasing: 64 % of the Europeans surveyed aged 15 to 24 report an overall good understanding of IP, compared with 68 % in 2013.

RECOGNITION OF THE ROLE OF IP IN PROTECTING THE RIGHTS OF INVENTORS, CREATORS, AND ARTISTS IS INCREASING

The importance of protecting IP is increasingly acknowledged, as almost all respondents believe it is important that inventors, creators and artists are able to protect their rights and be paid for their work. This belief reveals an attachment to the principles and recognition of the benefits of protecting IPR.

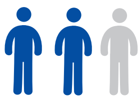
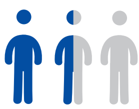
It is important that inventors, creators and performing artist **could protect their rights** and be paid for their work



LARGE MAJORITY OF EUROPEANS ACKNOWLEDGE IP AS A PILLAR FOR ECONOMIC STABILITY, ALBEIT WITH SOME LIMITATIONS

The percentage of the respondents who equate IP protection with maintaining economic stability remains stable, at 67 %. Additionally, two thirds of respondents recognise the role of IP-intensive companies in the creation of jobs, although agreement decreases slightly compared with 2013. However, half of the Europeans surveyed believe that strict protection of IP may curb innovation, and more than half feel that IP principles are not adapted to the internet[1].

1 - These two aspects were not surveyed in the 2013 report.

2/3 	**Agree** that if there was no longer any IP protection there **would be economic chaos** (=)	**Agree** that Compaies that **create a lot of IP** contribute sigificantly more than the others to the **creation of jobs or growth** (-1)
1/2 	*NEW* **Agree** that Strict protection of IP **may curb innovation**	*NEW* **Agree** that IP principles are **not adapted to the Internet**

Just as in 2013, the opinion associating the absence of IP rules with economic chaos is most prevalent among the youngest and oldest age groups: 73 % of respondents aged 15 to 24 and 70 % of those aged 55 or over share this belief. Interestingly, and consistently since 2013, the most-educated Europeans are less convinced by this impact (63 %), and the level of understanding of IP does not play any role in this belief.

The opinion of IP curbing innovation appears to be more widespread among the youngest Europeans surveyed: 6 out of 10 respondents aged 15 to 24 agree with this statement (59 %, versus the EU average of 50 %). It is also a frequent belief among buyers of counterfeit products and people downloading or streaming from illegal sources, 57 % of this sub-group agree with this statement.

IP REMAINS A LARGELY ABSTRACT CONCEPT FOR CITIZENS, WITH ALMOST HALF BELIEVING THAT 'ELITES' BENEFIT THE MOST FROM IP PROTECTION

IP remains a largely abstract concept for citizens, as there is a continuing trend of associating IP protection with the 'elite', such as large companies and famous artists. More than 4 out of 10 Europeans surveyed believe that these groups benefit the most from IP. At the same time, respondents think that consumers like themselves benefit to a much lesser extent. This pattern was the same in 2013.

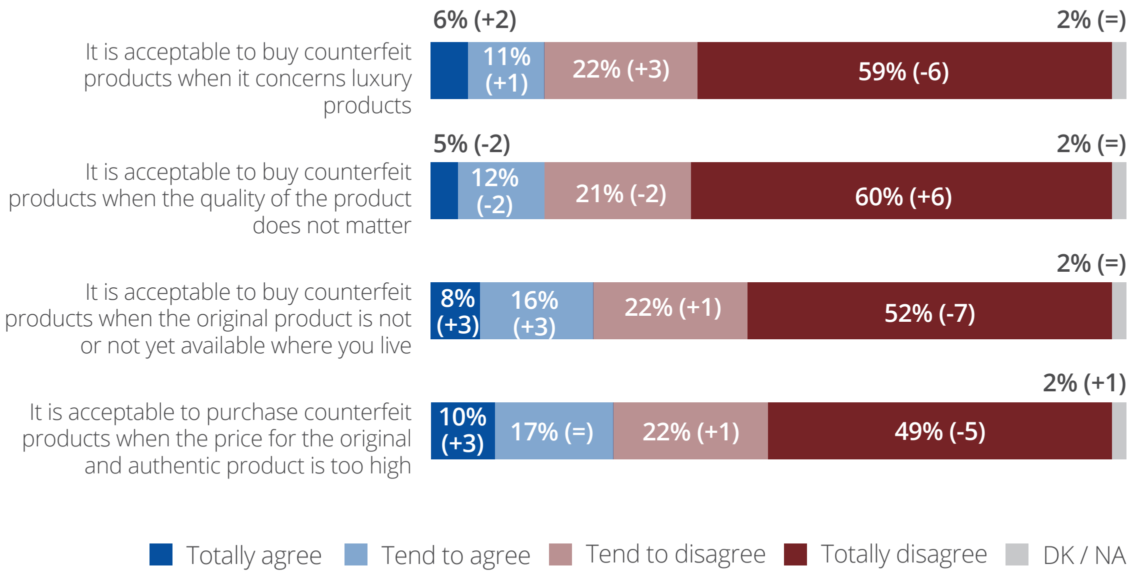
BIG COMPANIES: 24%	(-1)
FAMOUS PERFORMING ARTIST: 20%	(+3)
CONSUMER LIKE YOURSELF: 5%	(+1)
SMALL AND MEDIUM COMPANIES: 3%	(=)
BIG COMPANIES + FAMOUS ARTIST: 44%	

While overall the results are similar between the 2013 and 2016 surveys, a shift occurs when considering age groups. In 2013, the belief that large companies and famous artists were the main beneficiaries of IP was more concentrated among young Europeans. In 2016, however, this belief spans across age groups: 40 % aged 15 to 24 (– 7 points), 47 % aged 25 to 39 (unchanged from the 2013 study), 49 % aged 40 to 54 (+ 5 points), and 40 % of respondents aged 55 or over (+ 4 points).

COUNTERFEITING

CONTINUING STRONG CONDEMNATION OF THE PURCHASE OF COUNTERFEIT GOODS, BUT A SHIFT TOWARDS INCREASING ACCEPTANCE

The Europeans surveyed continue to regard IP as a fundamental value, which is closely linked to strong condemnation of purchasing counterfeit products. Seven out of ten Europeans surveyed believe that nothing can justify the purchase of counterfeit goods. This strong condemnation is further confirmed, as the proportion voicing the strongest attitude, 'totally disagree', is between 49% and 59 % for all the statements from the survey shown below.

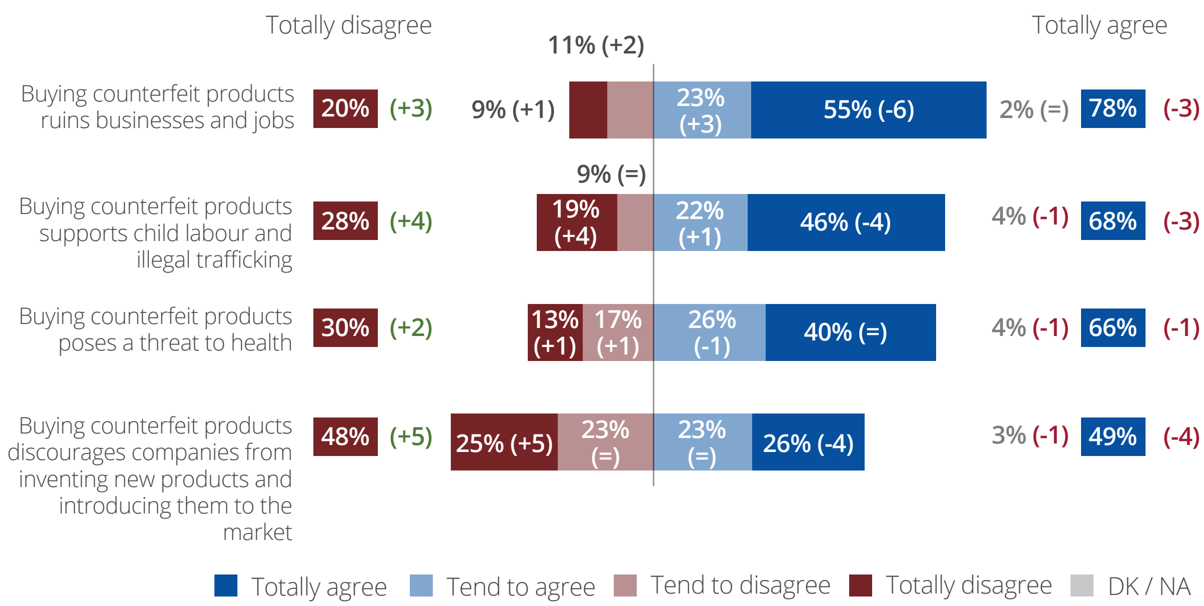


However, although condemnation of counterfeiting remains high acceptance of the practice is increasing, especially when the reasons for buying counterfeits are price and availability.

THE MAJORITY BELIEVE THAT COUNTERFEITS DAMAGE THE ECONOMY, WHILE THEH PERCEIVED IMPACT ON INNOVATION IS WEAKER

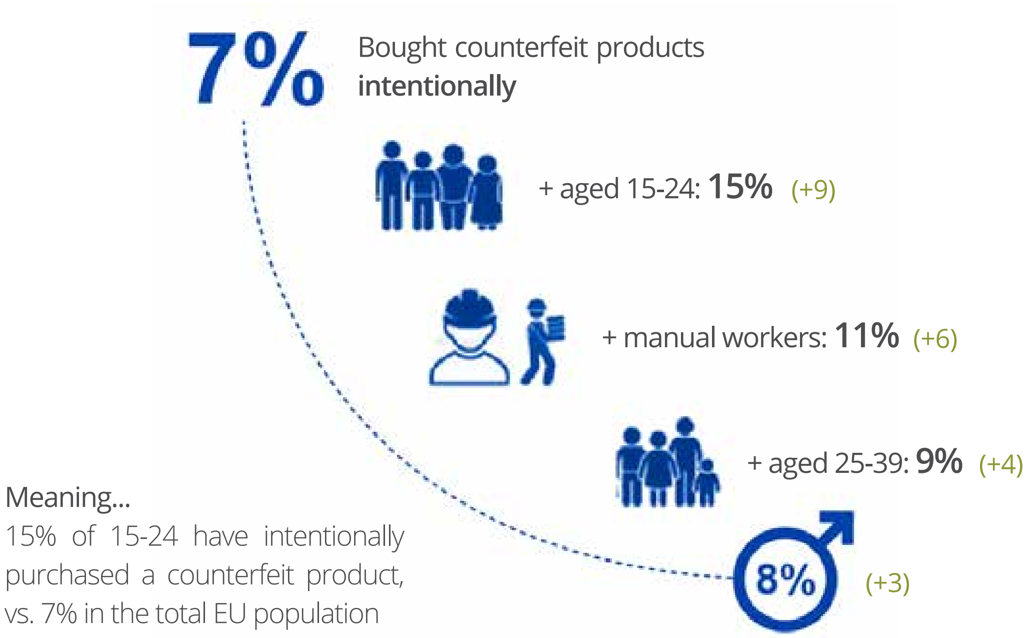
As in 2013, out of the four arguments tested, (negative impact on the economy, encouraging illegal trafficking, threat to public health and discouraging innovation), the economic factor continues to discourage purchasing of counterfeit products the most, as 78 % (– 3 points) of respondents believe that purchasing counterfeit products ruins businesses and jobs and only 20 % do not share this opinion. However, the proportion of those who do not acknowledge the damage of counterfeiting is increasing.

The negative impact of purchasing counterfeit products on innovation is the least-accepted argument overall when considering all four arguments tested and is even less evident to the Europeans surveyed in 2016 than it was in 2013. Almost half of the Europeans surveyed (48 %) do not believe that purchasing counterfeit products discourages innovation.



DECLARED PURCHASE OF COUNTERFEIT GOODS REMAINS LOW, BUT INCREASES, ESPECIALLY AMONG THE YOUNGER GENERATION

Overall, the percentage of the Europeans surveyed who declare intentionally purchasing counterfeit products remains low, but has increased 3 points since 2013 (7 % versus 4 % in 2013). Among those who admit having intentionally purchased counterfeit products, there is an observable over-representation of youth, as 15 % of the participants aged 15 to 24 admit having intentionally engaged in such behaviour (+ 9 points), compared to the European average of 7 % and only 4 % of respondents aged 55 or over.



PURCHASE OF COUNTERFEIT GOODS AS A RESULT OF BEING MISLED ALSO REMAINS LOW, BUT INCREASES, ESPECIALLY FOR MANUAL WORKERS AND THE SELF-EMPLOYED

Those who were misled into purchasing counterfeit goods also increased by 4 points (10 % v 6 % in 2013).

10% **bought counterfeit products as a results of being misled** (+4)

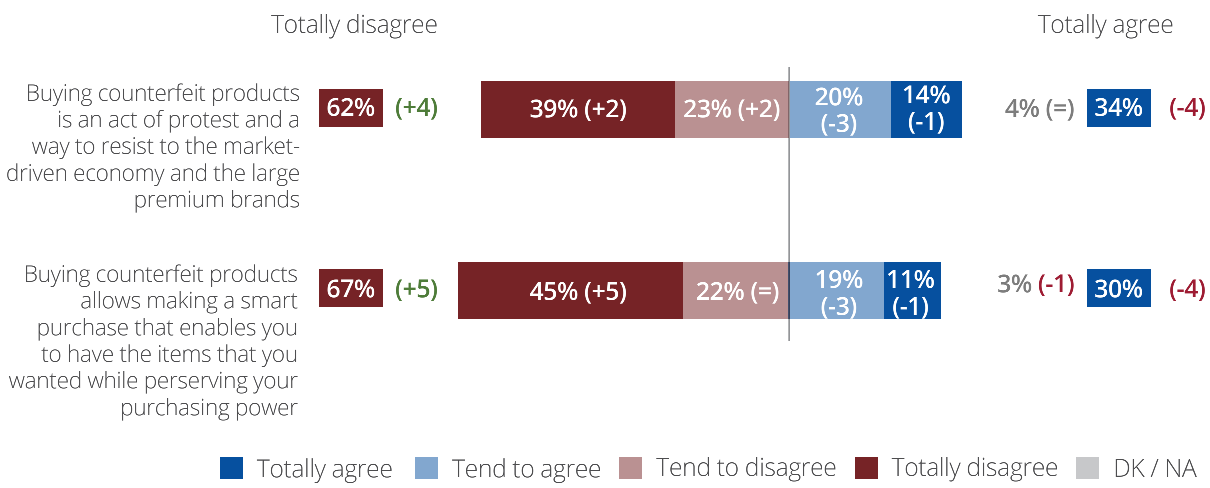
While in 2013, the youngest generation was the most likely to have purchased counterfeit products as a result of being misled, in this survey, respondents aged 25 to 39 who display this behaviour at a higher rate. In total, 12 % aged 25 to 39 say they have purchased counterfeit products due to being misled (+6 points), whereas 11 % of respondents aged 15 to 24 admit the same behaviour (+ 4 points).

While more Europeans surveyed are purchasing counterfeit goods, a notable proportion (35 %) have also wondered whether a product they purchased was genuine or counterfeit.

CITIZENS SURVEYED DECREASINGLY RATIONALISE PURCHASING COUNTERFEIT PRODUCTS AS ‘A SMART PURCHASE’ OR ‘AN ACT OF PROTEST’

While the level of acknowledgement of the negative impact of purchasing counterfeit products decreases and counterfeit purchasing behaviour increases, the rationalisation for purchasing counterfeit products to improve one’s purchasing power, or as an act of protest, also decreases.

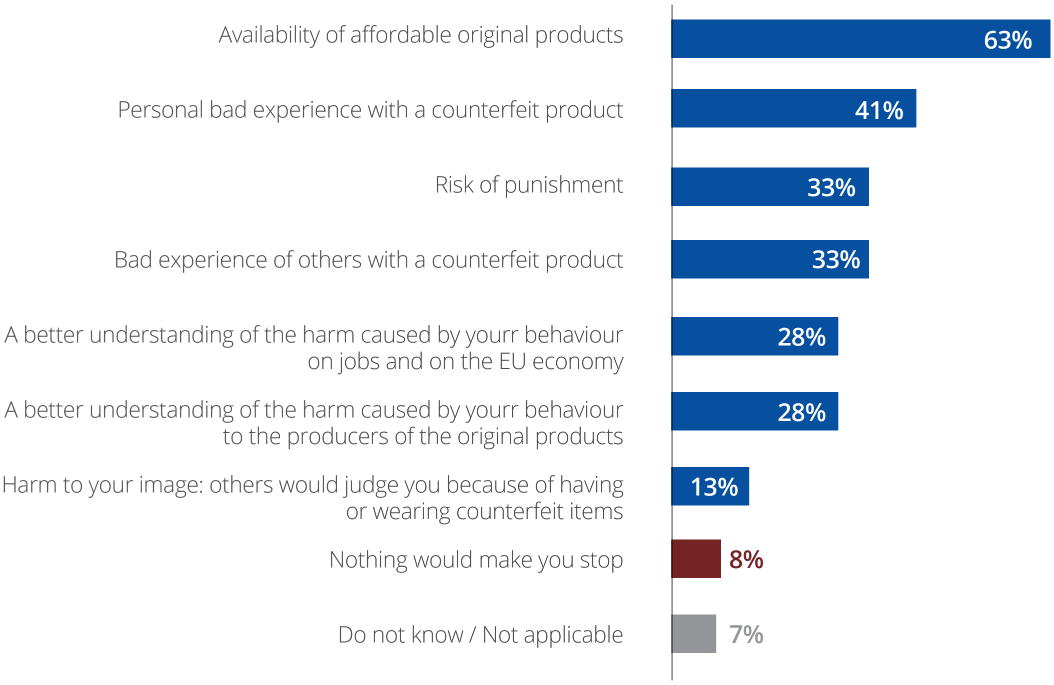
Of the Europeans surveyed, 34 % (□ 4 points) consider purchasing counterfeits as an act of protest, while 62 % do not share this opinion. Furthermore, Europeans also decreasingly view the act of purchasing counterfeits as one of resourcefulness is less prevalent, as the percentage of Europeans interviewed who consider buying counterfeits a smart purchase that can preserve one’s purchasing power decreases compared with 2013 (30 %, - 4 points).



As regards viewing counterfeit goods purchases both as a way of preserving purchasing power and as a way to protest against the market-driven economy, it is the youth and manual workers who are most likely to support these ideas, a continuing trend from the 2013 survey. However, while these groups are the most likely to justify counterfeit products purchasing based on resourcefulness and as an act of protest, it is noted that agreement with both ideas decreases among both groups compared with 2013.

INCREASED AVAILABILITY OF AFFORDABLE PRODUCTS WOULD MAKE BUYERS STOP PURCHASING COUNTERFEIT GOODS

Among respondents who admit having intentionally purchased counterfeit goods, the impact of this behaviour on the EU economy or the harm caused to the producers of the original content does not appear to make a significant impression. Just as the increase in acceptability of counterfeits appears to be driven by price, the same is observed regarding those who have intentionally purchased a counterfeit product within the last 12 months. The availability of affordable products is the main reason that would make counterfeit buyers discontinue this behaviour, ahead of a personal bad experience and the risk of punishment.

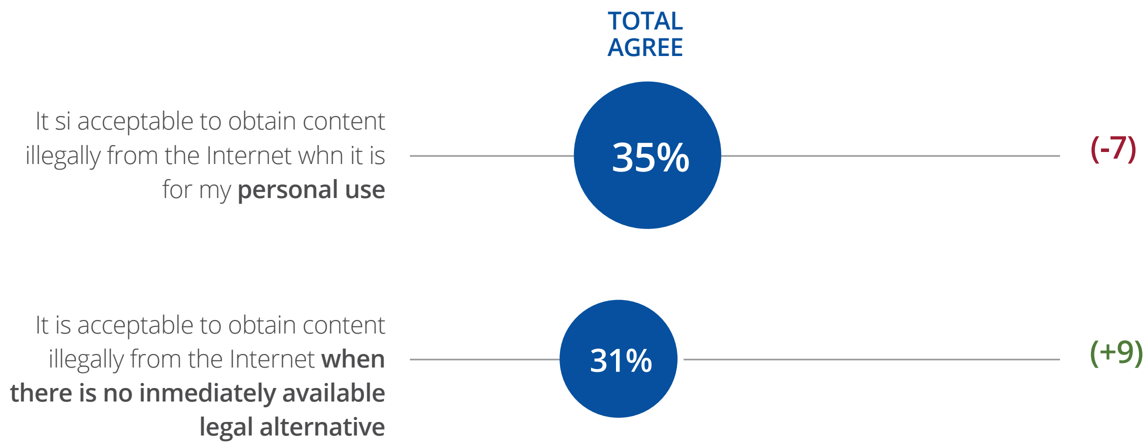


As regards the main reason that would make the Europeans surveyed stop purchasing counterfeit products, respondents aged 15 to 24 stand out, as 72 % of the younger generation attribute the behaviour to price, compared with 58 % of respondents aged 55 or over. Additionally, the most-educated respondents (65 %), men (65 %) and manual workers (67 %) are also the most likely to cite availability of affordable products as the primary reason that would make them stop purchasing counterfeit products.

DIGITAL CONTENT

GENERAL ACCEPTABILITY OF COPYRIGHT INFRINGEMENT DECREASES, ALTHOUGH ACCEPTABILITY OF DOWNLOADING/STREAMING FROM ILLEGAL SOURCES WHEN THERE IS NO LEGAL ALTERNATIVE INCREASES

While general acceptability of copyright-infringement behaviour decreases, with only 35 % of respondents believing it is acceptable to obtain online content illegally if it is for personal use (– 7 points), consumption needs appear to increasingly overrule legal concerns, as 31 % (+ 9 points) of the Europeans surveyed state that obtaining online content via illegal sources is acceptable if no legal alternative is available.



The level of acceptability of illegal downloading when there is no immediately available legal alternative decreases with age. However, compared with 2013, there is an observable reduction of the gap between the younger and older generations. In 2013, the gap between the youngest Europeans surveyed and the oldest was 31 points, whereas in 2016, this gap shrank to only 19 points. It appears that as older Europeans increasingly access digital content, their acceptability of using illegal sources also increases when there is no immediately available alternative.

INCREASING PREFERENCE FOR LEGAL SOURCES OVER ILLEGAL ONES

Even though an increasing proportion of the citizens surveyed state that infringing behaviour can be justified when no legal alternative is available, a large and increasing majority of the Europeans surveyed would choose the legal offer over illegal sources. There is a clear preference for using legal means to access online content when an affordable option is available, as 83 %

of the Europeans surveyed say they prefer to obtain digital content through legal/authorised services and not to use illegal means.

TOTAL AGREE

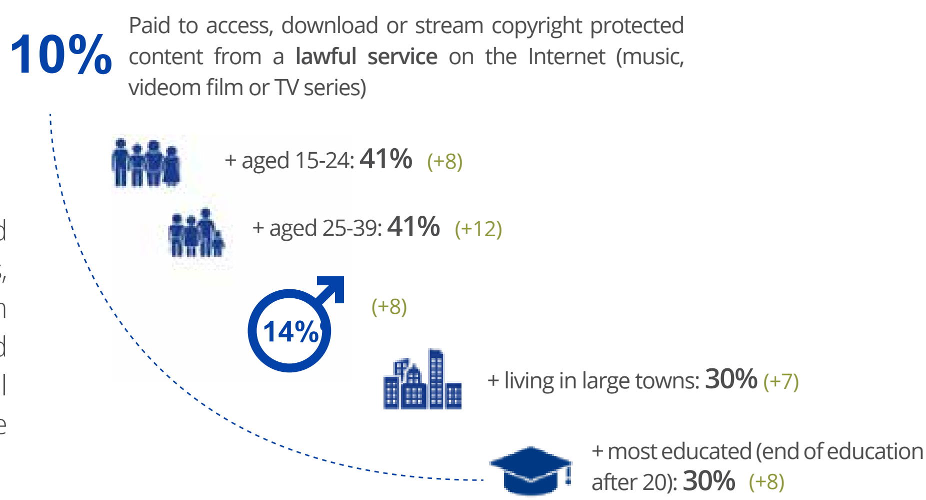
Whenever there is an affordable legal option **I prefer to access/download/stream content through authorised plattforms** and do not access/download/stream illegally — **83%** (+3)

Only 8 % declare they would not necessarily go for the legal option even if it were an available and affordable option. This proportion is much higher among copyright infringers, with 15 % of buyers of counterfeit products and 20 % of people downloading or streaming illegally expressing this opinion. It is also shared among the youngest Europeans surveyed. Among the 15 to 24-years olds, 13 % would still use the illegal option. However, this proportion has dropped by 4 points from 2013, whereas it has decreased by 2 points overall. This decline is consistent with the increase in the use of lawful services by the youngest Europeans.

INCREASE IN THE USE OF LEGAL SERVICES

Preference for obtaining content through legal means is shown by a growing number of the Europeans surveyed reporting using legal offers. In total, 27 % (+ 7 points) of the Europeans surveyed have paid to access digital content.

As regards respondents who say they have paid to access content online, youth, urban dwellers and men appear to drive this evolution. 41 % of those aged 15 to 24 (+ 8 points), 41 % of respondents aged 25 to 39 (+ 12 points), 30 % of respondents living in large towns (+ 7 points), and 32 % of men (+ 8 points) have paid to use a lawful service to access digital content.

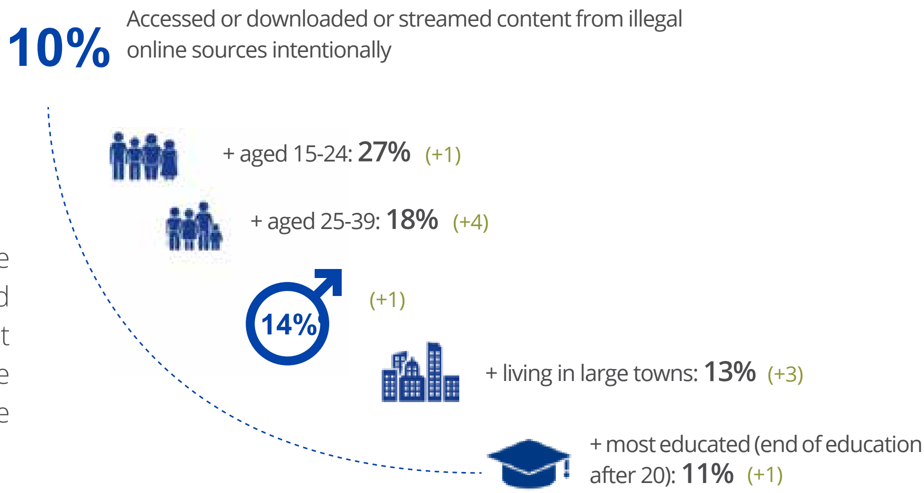


Meaning...
41% of 15-24 year old have paid to access, download or stream copyright protected content from a lawful service vs. 27% in the total EU population

Additionally, the most-educated respondents also have an impact on the evolution since 2013, as 32 % of these respondents (+ 8 points) have paid to access content via a lawful service online.

THE INCREASE IN THE PREFERENCE FOR AND USE OF LEGAL SOURCES HAS NOT YET LED TO A DECREASE IN THE USE OF ILLEGAL ONES

A minority of the Europeans surveyed, 10 % (+ 1 point), say they have intentionally used illegal sources online. While the younger generations are the most likely to have paid to access content, they are also the most likely to have intentionally accessed content using illegal sources, with the most significant increase among respondents aged 25 to 39: 27 % of participants aged 15 to 24 (+ 1 point) and 18 % of those aged 25 to 39 (+ 4 points).



Meaning...
27% of 15-24 have accessed or download or streamed content from illegal online sources vs. 10% in the total EU population.

NEED FOR CONSUMPTION APPEARS TO PREVAIL OVER LEGAL CONSIDERATIONS

Approximately one third (32 %) of the Europeans surveyed accessed copyright content online, legally or illegally, with 22 % using only lawful services, 5 % using only illegal sources and 5 % using a mix of paid lawful and illegal sources. This suggests that respondents are willing to switch between legal and illegal sources in order to gain access to content.

CONFUSION IS GROWING ABOUT WHAT CONSTITUTES A LEGAL OR ILLEGAL SOURCE

While use of lawful sources has increased, so has awareness of the legality of online content; however, there appears to be increased ambiguity regarding what constitutes a legal or illegal offer. A total of 24 % of the Europeans surveyed questioned whether a source was legal or not with, a 5 point increase compared with the 2013 study; and 4 % of the Europeans surveyed say they have investigated to check whether a source was legal or not, with a 2 point increase.

24% **Wondered** if a source where you could download music or video was legal or not (+5)

14% **Researched** to check if a source where you could download music or videos was legal or not (+2)

THE SUPERIOR QUALITY OF LEGAL OFFERS IS ACKNOWLEDGED BY A MAJORITY OF THE EUROPEANS SURVEYED, BUT IMPROVEMENT IN TERMS OF DIVERSITY SEEMS NECESSARY

Europeans appear to take a clearer stance regarding the quality of content offered by lawful services, as almost 7 out of 10 respondents believe that the content available through lawful services is superior to that of illegal sources. Room for improvement remains regarding the perception of the diversity of content offered by lawful services, as 54 % of the Europeans surveyed believe that lawful services offer more diverse content than what can be found through illegal solutions, although 27 % disagree.

	TOTAL AGREE	% accessed content illegally	% Did not access content illegally
NEW The **quality of content** offered by lawful services is **better** than what can be found throgh illegal solutions	69%	70%*	70%*
NEW The **diversity of content** offered by lawful services is **better** than what can be found through illegal offers	54%	45%	56%

* When calculating people who accessed illegally and people who din not, the total daes not equal the overall EU sample, as 3% of Europeans surveyed preferred not to answer this question. That is why there is an observed difference betwen the percentage of people agreeing with the statement and this split shown betwen declared infringers and non-infringers.

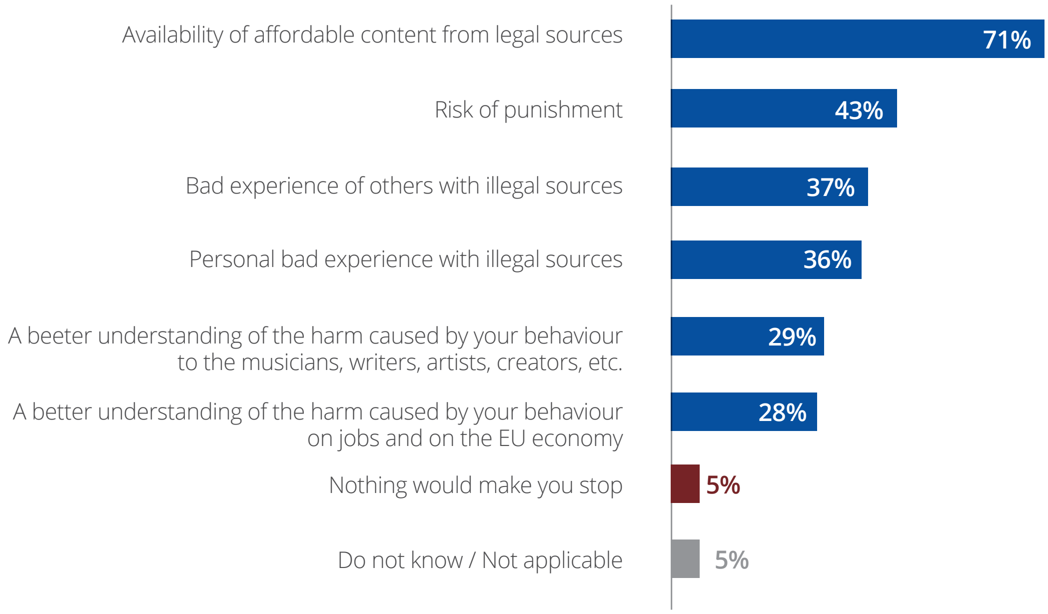
The belief that lawful services offer higher quality content than illegal sources is most prevalent among the younger generations, as three quarters of those aged 15 to 24 and 25 to 39 stated this opinion. The youngest generation also finds that lawful services have more diverse content than illegal options, as 6 out of 10 of the respondents aged 15 to 24 state this belief, whereas a little more than half of those aged 25 to 39 share this view.

The opinion that legal offers provide higher quality content is shared by both infringers (70 %) and non-infringers (70 %). In terms of diversity of content, infringers are the least likely to view legal offers as superior to illegal sources. A total of 45 % of the respondents who have accessed content illegally believe legal platforms have more diverse content, while 56 % of non-infringers share this belief[2].

AVAILABILITY OF AFFORDABLE CONTENT IS THE PRIMARY REASON THAT WOULD MAKE COPYRIGHT INFRINGERS STOP ACCESSING CONTENT VIA ILLEGAL SOURCES

Among respondents admitting to using illegal sources to access online copyright content, price and availability prevail as the apparent driver for such behaviour: 71 % of Europeans surveyed mention 'availability of affordable content from legal sources' as the main reason that would make them stop engaging in illegal behaviour. The availability of affordable content from legal offers as the top reason for stopping the behaviour is most strongly cited by respondents in the following categories: respondents aged 25 to 39 (74 %), employed (76 %), living in large urbanised cities (75 %), the most educated (72 %), which is in line with the profile of a typical online user.

2 - This is a new statement for Question 7 in the 2016 survey. Q7: For each of the following statements regarding lawful services offering content protected by copyright and related rights (e.g. music, films) on the internet please indicate whether you totally agree, tend to agree, tend to disagree or totally disagree.


Availability of affordable content from legal sources
71%
Risk of punishment
43%
Bad experience of others with illegal sources
37%
Personal bad experience with illegal sources
36%
A beeter understanding of the harm caused by your behaviour to the musicians, writers, artists, creators, etc.
29%
A better understanding of the harm caused by your behaviour on jobs and on the EU economy
28%
Nothing would make you stop
5%
Do not know / Not applicable
5%

1. LITERATURE REVIEW

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

1.1 OBJECTIVES OF THE LITERATURE REVIEW AND RESEARCH METHODOLOGY

In order to fulfil the goal of assessing and measuring the level of understanding and awareness of European Union citizens regarding Intellectual Property (IP) and its components, a comprehensive literature review of publicly available surveys was carried out. The aim was to capitalise on the existing intelligence available on the topic and to follow-up on the 2013 Literature Review in order to provide an overview of studies that have been conducted since the last report, as well as to identify any significant shifts in public knowledge/perception/opinion or any shifts in the focus of the studies.

Internet search engines (Google search, Google Scholar) were used to identify relevant studies. Studies dealing with consumers/business, as opposed to academic publications, were the focus of the research. As the literature review submitted in 2013 included studies between 2007 and 2013, only surveys published since 2013 were analysed in the 2016 Literature Review. The identified studies were conducted in the European Union as well as the USA, Australia, and Asia.

Each relevant survey was then analysed according to its:

Methodology
- Online
- Telephone
- Face-to-face interviews
- Behaviour monitoring through Cookies' tracking.

Target respondents
- Consumers
- Businesses
- Students.

Geographical scope
- Pan-European
- National (Australia, France, UK, USA, etc.)
- Worldwide.

Main focus of study
- Understand attitudes and behaviours regarding counterfeiting and piracy
- Knowledge and attitudes about intellectual property infringement

- State of IP awareness
- Knowledge/attitudes towards Intellectual Property in general
- General online behaviour.

1.2 MAIN FINDINGS

In terms of geographical scope, most of the surveys were carried out on a national basis, which is unchanged from the 2013 literature review. There are no existing Pan-European surveys on IP awareness, understanding and related practices, with the exception of the 2013 survey, European Citizens and Intellectual Property: Perception, Awareness and Behaviour, and the 2016 Intellectual Property and Youth Scoreboard, which were both conducted by the EUIPO. Of the studies carried out in European countries, there was an even split between the United Kingdom and France, with eight studies each. A few other national studies in European countries were carried out in Italy, Hungary, Germany and Poland.

Regarding methodology, and similar to the 2013 literature review findings, more than half of the surveys were carried out online, while only two surveys were conducted via telephone. A handful of surveys mixed online and face-to-face methodologies, in order to fit with the targets' specifications. In terms of target audience, the overwhelming majority of the surveys (27/28) were consumer-oriented, and another survey focused on students.

More than half of the surveys focused on understanding the attitudes and behaviour of consumers relating to piracy; while a handful of studies focused on the extent of online copyright infringement; a few explored attitudes toward legal offers online, which were not covered in 2013, and the remainder focused on more general attitudes and behaviours in cyberspace.

Regarding perceptions of the value of intellectual property, respondents tend to report the value of intellectual property and the importance of protecting it[3]. However, these thoughts still do not always translate into action[4], an observation that carries over from the 2013 literature review.

Overall, three notable conclusions are recurrent across the different surveys analysed.

Firstly, similar to the 2013 literature review, ambiguity persists as consumers continue to report confusion regarding what constitutes legal versus illegal content and/or sources. For example, once again in the United Kingdom, the studies find that confusion tends to surround copyright. Many internet users are confused about what actually constitutes an illegal download, with

3 - http://www.theamericanconsumer.org/wp-content/uploads/2013/07/Final-IP-Study-w-Cover.pdf

4 - https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/500211/IP_awareness_survey_2015.pdf

44 % of individuals reporting that they believe that it is legal to upload media that has been commercially produced onto file-sharing sites, although some of the participants admitted to being unsure about the legality of such uploads. Approximately 35 % of the participants firmly believed that copying TV shows or films as files from third parties — friends, relatives or other acquaintances — was legal[5]. A US study supports the claim of confusion surrounding copyright, as 73 % of respondents who admit to consuming content illegally agreed with this statement; 'I assume any music app that I can download from an official app store is licensed by artists and rights holders.' While 42 % disagreed, 58 % of the respondents said it was easy to determine whether a site that has free music is licensed by artists and rights holders[6]. An age component emerges, as a French study uncovers that young people (aged 15 to 24) are more likely to be knowledgeable about what is legal and what is not; however, young people are also more likely to consume content illegally[7].

In contrast to the 2013 literature review, a stronger focus is observed on legal offers in the online world. Particularly, awareness of legal offers online has increased, with 7 out of 10 French respondents reporting that they know of at least one legal offer online[8] and, in Australia, legal streaming services experienced a six point growth between 2014 and 2015 (from 26 % to 32 %)[9]. However, while knowledge of legal offers appears to have increased, there is no apparent correlation between this knowledge and a decrease in illegal content consumption, as a solid presence of individuals who consume content through a mix of illegal and legal means is noted[10]. Interestingly, licensed content services were used by a significantly higher proportion of infringers (who tend to be heavy content consumers) than non-infringers, specifically for YouTube, Spotify, Netflix and LoveFilm, with a significant increase in the use of Spotify by infringers. Over a quarter of all infringers said they do so because it means they can try before they buy, rising to 30 % among those who consumed both legal and illegal content. However, 46 % of infringers indicated that they had previously accessed for free some of the digital and physical content that they later went on to pay for[11]. Notably, it is revealed that infringers are more likely to pay for content than their non-infringing counterparts. In the USA, peer-to-peer file sharers are heavy legal media consumers; they buy as many legal DVDs, CDs, and subscription media services as their non-file-sharing, internet-using counterparts and they buy approximately 30 % more digital music. They also display marginally higher willingness to pay[12]. Another US study found that those who consumed a mix of legal and illegal content spent more money over a 3-month period than those who consumed 100 % of their content legally, but those who consumed 100 % of their content illegally spent the least money[13]. Regarding music consumption, individuals using unlicensed options for music acquisition spend USD 33 per capita on CDs and paid digital downloads. The US average is USD 19 per capita. Half of them bought a CD or download last year, which is a higher percentage than the population average. They are also more likely to stream, including using paid services such as Spotify Premium[14].

5 - http://www.des2013.co.uk/pdf/Digital_Entertainment_Survey_2013.pdf

6 - http://www.musicwatchinc.com/blog/bad-company-you-cant-deny/

7 - https://www.hadopi.fr/sites/default/files/page/pdf/synthese-etude-digital-natives-janvier-2013.pdf

8 - https://www.hadopi.fr/actualites/actualites/premiere-vague-du-barometre-de-loffre-legale

9 - http://voxindie.org/wp-content/uploads/2015/10/2015-Research-Incidence-Frequency-V6.pdf

10 - https://www.hadopi.fr/actualites/actualites/3e-vague-du-barometre-usage-ifop-hadopi

11 - http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/online-copyright/w4/OCI_MAIN_REPORT_W4_FINAL.pdf

12 - http://piracy.americanassembly.org/copy-culture-report/

13 - https://www.communications.gov.au/sites/g/files/net301/f/DeptComms%20Online%20Copyright%20Infringement%20Report%20FINAL%20.pdf

14 - http://www.musicwatchinc.com/blog/bad-company-you-cant-deny/

Lastly, as disclosed in the 2013 literature review, price remains the main reason for accessing pirated content or purchasing counterfeit goods, and accessibility and convenience emerge as other drivers. A French study reports that an overwhelming majority of respondents (79 %) said that price is the number one deterrent for legal consumption[15], and a study in the United Kingdom revealed that half of the respondents cited consuming content illegally because it is free[16]. The same study found that more than 4 in 10 respondents cited 'convenience' as their reason for consuming content from illegal sources. However, the number one reason most consumers in Australia and Singapore chose to watch pirated video content was because the video content is not available legally in their region[17].

While the several studies included in the 2013 literature review focused on counterfeiting and counterfeit products, only one study on this topic emerges in the 2016 literature review, Counterfeit Goods in the UK, a notable shift in study focus.

15 - https://www.hadopi.fr/actualites/actualites/3e-vague-du-barometre-usage-ifop-hadopi

16 - https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/546223/OCI-tracker-6th-wave-March-May-2016.pdf

17 - http://irdeto.com/news-and-events/irdeto-consumer-research-reveals-consumer-attitudes-towards-pirated-content.html

2. QUANTITATIVE SURVEY

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

2.1 METHODOLOGY REMINDER

In 2013, the European Union Intellectual Property Office commissioned the study *European Citizens and Intellectual Property: Perception, Awareness and Behaviour*, to explore Europeans' attitudes towards IP and the degree to which Europeans respect these rights and the concept as a whole. This study, conducted in 2016, provides an updated analysis and offers comparison with the results of the 2013 study, based on a new quantitative survey and literature review.

The quantitative survey forms the second part of the study, following the literature review. It covers the population of the respective nationalities of the EU Member States and residents in each of the 28 Member States who are aged 15 years and over. Overall, 26 555 interviews were carried out: 1 000 per Member State in 25 Member States and 500 per Member State in 3 Member States (Cyprus, Luxembourg, Malta). All interviews were carried out using the CATI system. The basic sample design applied in all states is multi-stage random (probability). In each household, the respondent was drawn at random following the 'last birthday rule'.

Consequently, as in 2013, each country sample is representative of the country population of people aged 15 years and over in terms of gender and age. At the same time, the EU-28 sample is representative of the EU population in terms of gender, age and population distribution in terms of countries; each Member State has been weighted to its actual weight in the overall EU population. Note that the socio-demographic structures of both the overall EU population and of each of the countries within the scope have remained stable, guaranteeing the strict comparability of the results between 2013 and 2016.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentages. For example, with samples of approximately 1 000 interviews, the real percentages vary within the following confidence limits:

Statistical Margin due to the sampling process (at the 95% level of confidence)

various observed results are in columns

	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	

Please refer to Appendix C for more examples of sample sizes.

Eighty per cent of the questionnaire used in the 2016 study was similar to the 2013 study , in order to allow comparisons with the 2013 results and thus to identify trends.

New questions were integrated to allow further exploration into perspectives that the 2013 survey had revealed and to follow their evolution in the context of IP. Items were added to the questionnaire to study perceptions of the connection between protection of IP and innovation, and the adaptation of IP principles to the internet. In addition, two questions inspired by the IP Youth Scoreboard were added, focusing on the reasons that could make infringers — both people buying counterfeit products and people downloading/streaming illegally — discontinue thiss behaviour. On this set of new questions, no comparisons could be draw to 2013.

Finally, some items were reworded following analysis of the 2013 results, which suggested that they might have been confusing to respondents. The rewording allowed more relevant findings for these items. Although this prevented drawing a direct comparison between the actual percentages from 2013 and 2016, trends could be identified.

2.2 KEY FIGURES

- Altogether, 75 % of the Europeans surveyed report having either a 'very good' or 'rather good' understanding of the term 'intellectual property', compared with 73 % in 2013. This increase in 'good' understanding is mainly driven by a 'rather good' understanding (+ 10 points), since at the same time, there is a reduction in the strength of understanding, as respondents saying they have a 'very good' understanding decreases by 8 points.

- Overall, the Europeans interviewed are strongly attached to the principle of IP and recognise its benefits: 97 % of Europeans agree that 'it is important that inventors, creators and performing artists could protect their rights and be paid for their work,' with 82 % of respondents saying they 'totally agree' — a 5-point increase from 2013. Moreover, a majority of the EU citizens surveyed recognise the role of IP in improving and guaranteeing quality, + 6 points in respondents who 'totally agree'.

- Similar to the 2013 study, two thirds of the Europeans surveyed agree that 'if there were no longer any IP protection there would be economic chaos'.

- Almost half (44 %) of the Europeans surveyed believe that the main beneficiaries of IP are 'elites' (large companies, 24 %; and famous artists, 20 %) — a belief that spans across age groups and is most prominent among the most educated[18].

18 - As education systems differ from one country to another, the standardised variable used in EU-28 surveys to study sub-populations in terms of level of education is the age at the end of education: '15 –' means people were aged 15 or under when they left school, '20+ ' means they were aged 20 or over. Throughout the study we refer to 'the most educated' — meaning respondents who left school when they were aged 20 or over — and 'the least educated'— meaning respondents who were aged 15 or under when they left school.

- While declared purchasing counterfeit products remains very low, there is a significant increase in this behaviour in comparison with 2013, with 10 % of the Europeans surveyed having bought counterfeit products as a result of being misled (+ 4 points) and 7 % (+ 3 points) of Europeans having bought counterfeit products intentionally. This behaviour is mainly driven by the youngest Europeans, as 15 % admit to having intentionally purchased counterfeit products, which is a large increase compared with 2013 (+ 9 points).

- The impact of IP on innovation is not shared by the majority of the Europeans surveyed, as half of the respondents feel that 'strict protection of IP may curb innovation'. In addition, the negative impact of counterfeiting on innovation is not fully recognised, as 48 % of the Europeans surveyed disagree with the statement 'buying counterfeit products discourages companies from inventing new products and introducing them to the market' (+ 4 points).

- Purchasing counterfeit products is increasingly attributed to the price of products and availability. This is particularly true among young people. Altogether, 27 % of the Europeans surveyed and 41 % of respondents aged 15 to 24 agree that 'it is acceptable to purchase counterfeit products when the price for the original and authentic product is too high', while 24 % of the Europeans surveyed, and 39 % of those aged 15 to 24 think that 'it is acceptable to buy counterfeit products when the original is not or not yet available where you live'.

- While purchasing counterfeit products is increasingly attributed to price and availability, one third of the Europeans surveyed still view buying counterfeit goods as an act of protest and a way of being resourceful; however, this belief has weakened since 2013. The youngest generation and manual workers are the most likely to rationalise counterfeit purchases as an act of protest or as resourceful behaviour, a trend which remains unchanged from the 2013 survey. While these groups are the most likely to justify purchasing counterfeit products based on resourcefulness and as an act of protest, it is noted that agreement with both ideas decreases across both groups compared with 2013.

- Regarding digital content, half of the Europeans surveyed think that 'IP principles are not adapted to the internet'. The youngest generations are most likely to hold this belief; however, at least half of the Europeans surveyed across age groups agree with this statement, except for those aged 55 or over. Men; the most-educated Europeans; those who are self-employed, or are employees; and those who live in large towns are also the most likely to share this view, as more than half of the respondents in each group say they 'agree' that IP principles are not adapted to the internet.

- One third of the Europeans surveyed (60 % of respondents aged 15 to 24, and 50 % of those aged 25 to 39) accessed online copyright content, either legally (paid) or illegally in the last 12 months.

- Of the Europeans surveyed, 27 % report having paid to access, download or stream copyright content from a lawful service on the internet — a 7-point increase in comparison with 2013. Young Europeans were higher consumers of digital content from lawful sources, with 41 % of both those aged 15 to 24 and 25 to 39 having used a service they paid for.

- 10 % of the Europeans surveyed admit to having intentionally accessed, downloaded or streamed content from illegal online sources during the last 12 months (+ 1 point), and due to their significant content consumption, 27 % of those aged 15 to 24 admit having exhibited the same behaviour (+ 1 point).

- 24 % of the Europeans surveyed (41 % of those aged 15 to 24, – 1 point) have wondered whether a source was legal or not (+ 5 points), while 14 % of the Europeans surveyed (27 % of respondents aged 15 to 24, – 1 point) have investigated to check whether a source was legal or not (+ 2 points).

- It appears that the purpose of engaging in illegal behaviour to access online content is not only to simply infringe rules, but rather for consumption, as evidenced by the fact that more than half (52 %) of the Europeans surveyed who used illegal sources also reportedly used lawful services to access content.

- This desire to consume digital content is also evidenced by 31 % of the Europeans surveyed (43 % of respondents aged 15 to 24, + 1 point) agreeing that it is acceptable to obtain content illegally from the internet when there is no immediately available legal alternative (+ 9 points).

- The consumption need is further supported by the phenomenon that the Europeans surveyed do not necessarily prefer illegal sources, but simply prefer having access to desired content: 83 % of the Europeans surveyed state that, 'Whenever there is an affordable legal option, I prefer to access/download/stream content through authorised platforms and do not access/download/stream illegally' (a 3-point increase in comparison with 2013).

- The superior quality of legal offers is acknowledged by the majority (69 %) of the Europeans surveyed, and it is an opinion that is shared between infringers and non-infringers. However, an improvement in legal offers in terms of diversity seems essential, as just over half (54 %) of the Europeans surveyed feel that the diversity of content offered by lawful services is better than what is available through illegal sources, with infringers questioning the legal offer most (only 45 % of infringers think that legal offers have more diverse content than illegal sources).

2.3 DETAILED ANALYSIS

2.3.1 Knowledge of intellectual property and attachment to the concept

2.3.1.1 Intellectual property continues to be an abstract concept to a substantial proportion of European citizens

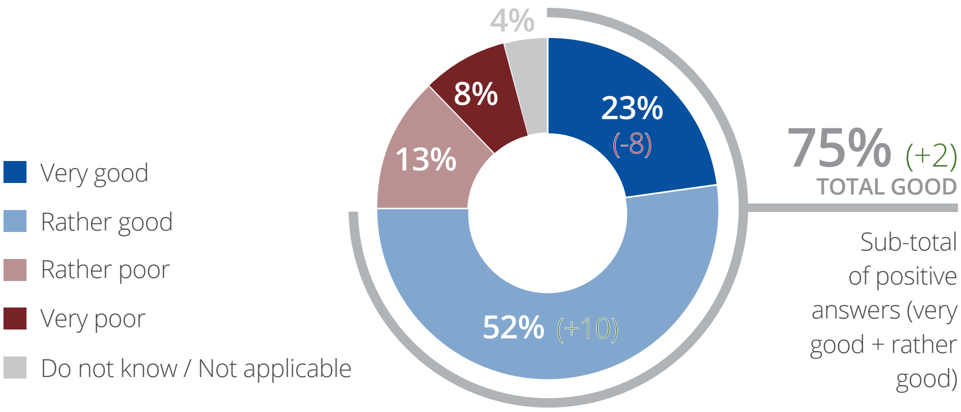
In 2016, the European citizens surveyed increasingly feel they understand the concept of intellectual property, as three quarters (75 % versus 73 % in 2013) of them state that they have a good understanding of the concept. However, while the percentage of Europeans who say they have a 'rather good' understanding of IP increases by 10 points, (52 % versus 42 % in 2013), there appears to be a reduction in the strength of understanding, as the percentage of people with a 'very good' understanding decreases by 8 points (23 % versus 31 % in 2013)[19].

19 - 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'?

Graph 1. Understanding of IP, EU-28 average

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'?

Note: (+ xx) (–   x) (=) shows how the results have evolved since 2013



While reported understanding of intellectual property increases across Europeans surveyed as a whole, younger Europeans reflect a decreasing understanding from 2013, with 64 % of respondents aged 15 to 24 (versus 68 % in 2013) saying they have either a 'very good' (14 % versus 27 % in 2013) or 'rather good' (50 % versus 41 % in 2013) understanding of IP. Similar to the 2013 study, the reported understanding of IP appears to be directly correlated with education levels in EU-28: When considering respondents who say that they have a 'very good' understanding of IP, it is the EU citizens with the highest level of education who continue to stand out, as 29 % of respondents who completed school after age 20 say they have a 'very good' understanding of IP (versus 39 % in 2013). Just as was reported in 2013, respondents living in large towns disclose the highest level of 'good' understanding, with 76 % of urban-dweller respondents (the same percentage as in 2013) having either a 'very good' or 'rather good' understanding. Additionally, men continue to reflect better understanding of IP (77 %, + 1 point) compared with women (71 %, unchanged from 2013), and self-employed respondents (80 %, – 1 point) still report 'good' understanding at a higher level than other occupations, although this good understanding decreases slightly due to a 10-point decrease in the 'very good' response. Overall, good understanding of IP among manual workers (66 %) and respondents who do not work (71 %) remains stable from 2013, while respondents classified as 'employees' show an overall increase that is in line with the EU average (79 %, + 2 points), which is driven by an 11-point increase in 'rather good' understanding.

Detailed results: Understanding of the term 'intellectual property', according to age and education level in EU-28 (including evolution since the 2013 study).

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'?

Note: Total Good = Very Good + Rather Good and Very Poor = Very Poor + Rather Poor

	EU-28 Average	Age				Education (End of)[20]			
		15-24	25-39	40-54	55+	15 –	16-19	20+	Still studying
Total 'Good'	75 % (+ 2)	64 % (– 4)	77 % (+ 3)	77 % (+ 2)	75 % (=)	61 % (+ 3)	71 % (+ 2)	82 % (=)	67 % (– 1)
Total 'Poor'	21 % (– 3)	31 % (=)	20 % (– 4)	19 % (– 4)	19 % (– 2)	28 % (– 6)	23 % (– 5)	15 % (– 2)	30 % (– 1)
DK/NA	4 % (+ 1)	5 % (+ 4)	3 % (+ 1)	4 % (+ 2)	6 % (+ 2)	11 % (+ 3)	6 % (+ 3)	3 % (+ 2)	3 % (+ 2)

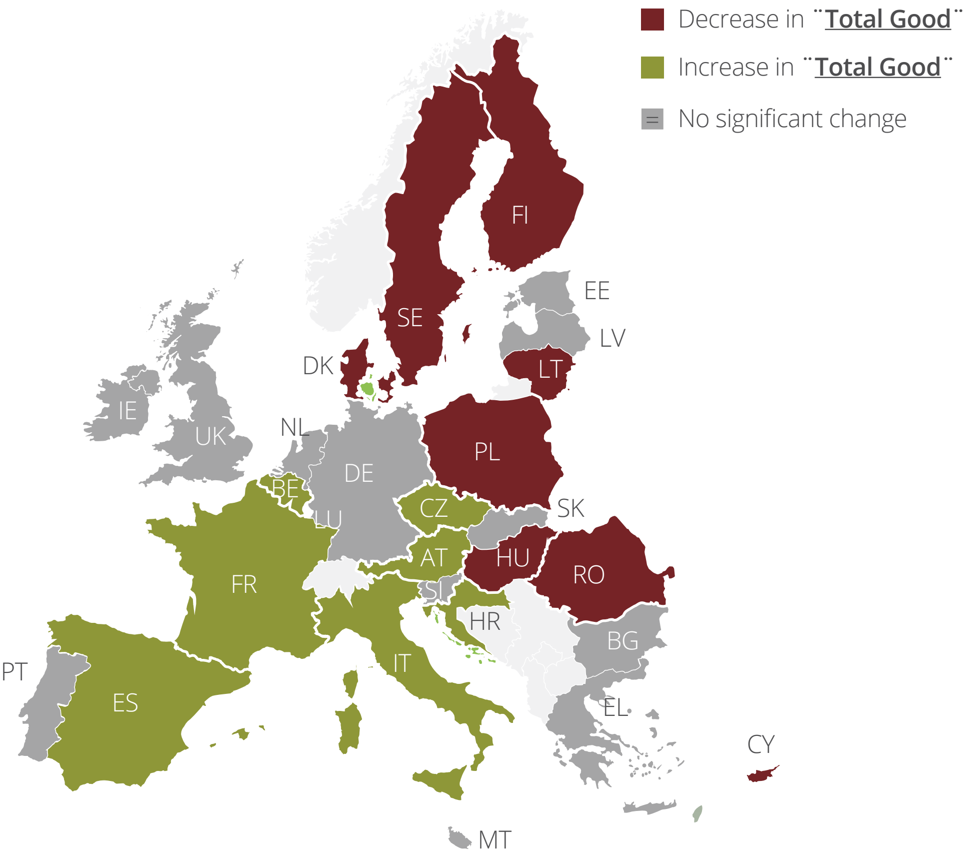
Geographical results must also be considered, as Nordic and eastern European countries show a decrease in the number of respondents who feel they have a 'good' ('very good' + 'rather good') understanding of IP. However, there is an overall weakening in terms of the level of understanding, as only one country (Malta) in EU-28 shows an increase in 'very good' understanding of IP.

20 - As education systems differ from one country to another, the standardised variable used in EU-28 surveys to study sub-populations in terms of level of education is the age at the end of education; '15 –' means people were aged 15 or under when they left school, '20 +' means they were aged 20 or over. Throughout the study we refer to 'the most educated' — meaning respondents who left school when they were aged 20 or over — and 'the least educated' — meaning respondents who were aged 15 or under when they left school.

Detailed results: Understanding of the term 'intellectual property' in EU-28 — evolution of 'Total Good' since 2013.

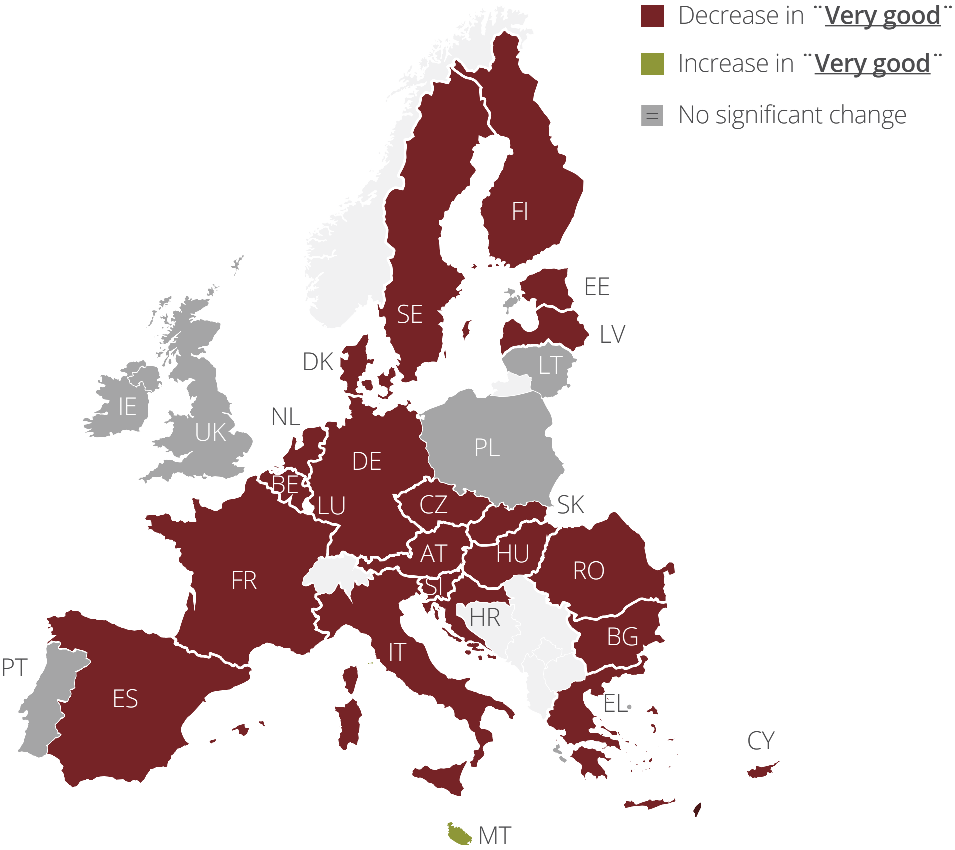
Q1 — Personally, would you say that you have a very good, rather good, rather poor or very poor understanding of the meaning of the term 'intellectual property'?

Note: 'Total Good' = 'Rather good' + 'Very good' response



Detailed results: Understanding of the term 'intellectual property' in EU-28 — evolution of 'Very Good' since 2013.

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'?



Additionally, while the overall average of the Europeans surveyed who express a 'very poor' understanding remains unchanged from 2013 (8 %), a noticeable shift occurs in Nordic countries (Finland, Sweden, Denmark) and Cyprus, as these countries report remarkably higher levels of the 'very poor' response, which has increased over time:

- in Finland, respondents who say they have a 'very poor' understanding of intellectual property reaches almost half (49 %), which is an 8-point increase compared with the 2013 study;
- nearly half (44 %) of the respondents in Sweden also believe they have a 'very poor' understanding, a 13-point increase from 2013;
- 34 % of the respondents in Denmark say they have a 'very poor' understanding of IP, 10-points higher than in 2013;
- 35 % of Cypriots have a 'very poor' understanding of IP, an 11-point increase compared with 2013; however, 14 % of Cypriots also respond 'Don't know' (+ 3 points).

Detailed results: Understanding of IP by country and EU-28.

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'?

Note: Total Good = Very Good + Rather Good and Very Poor = Very Poor + Rather Poor

	Very good	Rather good	Total 'Good'	Rather poor	Very poor	Total 'Poor'	DK/NA
PL	35 % (– 1)	45 % (– 4)	80 % (– 5)	13 % (+ 2)	5 % (+ 3)	18 % (+ 5)	2 % (=)
SK	35 % (– 8)	44 % (+ 8)	79 % (=)	11 % (– 3)	5 % (=)	16 % (– 3)	5 % (+ 3)
AT	33 % (– 11)	56 % (+ 15)	89 % (+ 4)	7 % (– 2)	2 % (– 3)	9 % (– 5)	2 % (+ 1)
CZ	33 % (– 6)	48 % (+ 10)	81 % (+ 4)	12 % (– 3)	4 % (– 2)	16 % (– 5)	3 % (+ 1)
DE	29 % (– 11)	57 % (+ 13)	86 % (+ 2)	7 % (– 4)	2 % (– 2)	9 % (– 6)	5 % (+ 4)
HR	29 % (– 5)	51 % (+ 12)	80 % (+ 7)	11 % (– 3)	5 % (– 5)	16 % (– 8)	4 % (+ 1)
RO	29 % (– 11)	44 % (– 6)	73 % (– 17)	15 % (+ 9)	10 % (+ 7)	25 % (+ 16)	2 % (+ 1)
BG	28 % (– 16)	55 % (+ 13)	83 % (– 3)	8 % (=)	7 % (+ 4)	15 % (+ 4)	2 % (– 1)
SI	27 % (– 6)	49 % (+ 6)	76 % (=)	16 % (+ 1)	7 % (– 1)	23 % (=)	1 % (=)
FR	26 % (– 11)	63 % (+ 15)	89 % (+ 4)	7 % (– 4)	2 % (– 1)	9 % (– 5)	2 % (+ 1)
LU	26 % (– 4)	59 % (+ 7)	85 % (+ 3)	10 % (– 1)	4 % (– 2)	14 % (– 3)	1 % (=)
EL	24 % (– 5)	42 % (+ 1)	66 % (– 4)	11 % (– 3)	13 % (+ 2)	24 % (– 1)	10 % (+ 5)
EU-28	23 % (– 8)	52 % (+ 10)	75 % (+ 2)	13 % (– 3)	8 % (=)	21 % (– 3)	4 % (+ 1)
HU	22 % (– 12)	53 % (+ 5)	75 % (– 7)	15 % (+ 4)	5 % (+ 2)	20 % (+ 6)	5 % (+ 1)
CY	22 % (– 8)	22 % (– 3)	44 % (– 11)	7 % (– 3)	35 % (+ 11)	42 % (+ 8)	14 % (+ 3)
BE	21 % (– 10)	57 % (+ 13)	78 % (+ 3)	13 % (– 5)	7 % (+ 1)	20 % (– 4)	2 % (+ 1)
IE	21 % (+ 1)	36 % (+ 2)	57 % (+ 3)	21 % (– 5)	16 % (– 3)	37 % (– 8)	6 % (+ 5)
UK	19 % (– 4)	32 % (+ 2)	51 % (– 2)	21 % (– 4)	20 % (+ 3)	41 % (– 1)	8 % (+ 3)
ES	17 % (– 11)	59 % (+ 22)	76 % (+ 11)	15 % (– 7)	3 % (– 7)	18 % (– 14)	6 % (+ 3)
MT	17 % (+ 8)	15 % (– 9)	32 % (– 1)	12 % (=)	31 % (– 23)	43 % (– 23)	25 % (+ 24)
IT	15 % (– 11)	65 % (+ 17)	80 % (+ 6)	14 % (– 1)	4 % (– 3)	18 % (– 4)	2 % (– 2)
LT	13 % (– 3)	52 % (– 3)	65 % (– 6)	17 % (– 2)	13 % (+ 7)	30 % (+ 5)	5 % (+ 1)
NL	13 % (– 6)	51 % (+ 5)	64 % (– 1)	20 % (– 4)	11 % (+ 2)	31 % (– 2)	5 % (+ 3)
EE	11 % (– 7)	51 % (+ 10)	62 % (+ 3)	21 % (– 3)	11 % (– 2)	32 % (– 5)	6 % (+ 2)
DK	11 % (– 1)	24 % (– 4)	35 % (– 5)	22 % (– 8)	34 % (+ 10)	56 % (+ 2)	9 % (+ 3)
LV	8 % (– 13)	53 % (+ 9)	61 % (– 4)	27 % (+ 2)	10 % (+ 3)	37 % (+ 5)	2 % (– 1)
PT	7 % (– 1)	70 % (+ 1)	77 % (=)	9 % (– 8)	3 % (+ 1)	12 % (– 7)	11 % (+ 7)
FI	5 % (– 6)	18 % (– 1)	23 % (– 7)	24 % (– 4)	49 % (+ 8)	73 % (+ 4)	4 % (+ 3)
SE	4 % (– 8)	20 % (=)	24 % (– 8)	23 % (– 4)	44 % (+ 13)	67 % (+ 9)	9 % (– 1)

As reported in 2013, intellectual property remains a largely abstract concept for the European citizens surveyed as they continue to recognise the main beneficiaries of IP as the ‘elites’. The Europeans surveyed once again indicate large companies first (24 % versus 25 % in 2013), and then identify famous artists (20 % versus 17 % in 2013), inventors (13 % versus 17 %), and politicians (11 % versus 6 %). While creators of artistic content were viewed by 12 % of the Europeans surveyed as benefiting the most from IP in 2013, in 2016 the number slides to 10 %, followed by less well-known performing artists (6 % versus 4 % in 2013), consumers (5 % versus 4 % in 2013), and small and medium companies (3 %, no change since 2013). The surveyed European citizens’ perceptions of IP still focus on the ‘elite’ or ‘powerful’ receiving the most benefits, while consumers like themselves are much less identified, and therefore, the protection of their rights is not seen[21].

21 - Q2: In your opinion, who benefits the most from the protection of intellectual property?

While similarities regarding the beneficiaries of IP between 2013 and 2016 abound, a shift occurs when considering age groups. In 2013, the belief that large companies and famous artists were the main beneficiaries of IP was more concentrated among young Europeans, whereas in 2016, this belief spans across the age groups: 40 % of respondents aged 15 to 24 (– 7 points), 47 % aged 25 to 39 (unchanged from 2013), 49 % of those aged 40 to 54 (+ 5 points), and 40 % of respondents aged 55 or over (+ 4 points).

This opinion continues to be shared by the most-educated Europeans surveyed and is increasing, as 48 % of these respondents name large companies and famous artists as the top beneficiaries, compared with 45 % in 2013. In addition, this group is still the least likely to consider consumers like themselves as a beneficiary of IP protection (4 % versus 3 % in 2013).

As regards large companies being the main beneficiaries, men continue to be more likely than women to express this opinion, with 28 % of men (– 1 point) and 20 % of women (– 2 points) giving this response, whereas, men and women once again respond at the same level as each other (20 %, + 3 points) regarding famous performing artists. In this study, women are slightly more likely to view consumers like themselves as the main beneficiary (5 %, + 1 point), while men’s views on this topic remain stable at 4 %.

Additionally, the percentage of respondents agreeing that consumers like themselves benefit the most from IP increases slightly (5 % versus 4 % in 2013), and it is the two older generations driving this increase, as the percentage of respondents aged both 40 to 54 (5 %) and 55 or over (6 %) who recognise the benefits to consumers increases by 2 points each.

Detailed results: Perception of who benefits the most from the protection of intellectual property according to age and education level.

Q2 — In your opinion, who benefits the most from the protection of intellectual property?

	EU-28	Age				Education (End of)[20]			
		15-24	25-39	40-54	55+	15 –	16-19	20+	Still studying
Consumers like yourself	5 % (+ 1)	5 % (– 1)	3 % (– 1)	5 % (+ 2)	6 % (+ 2)	5 % (=)	5 % (=)	4 % (+ 1)	5 % (=)
Large companies	24 % (– 1)	22 % (– 6)	28 % (– 2)	26 % (=)	21 % (=)	22 % (+ 1)	20 % (– 4)	26 % (– 1)	27 % (– 2)
Small and medium companies	3 % (=)	4 % (=)	2 % (– 1)	3 % (=)	4 % (+ 2)	4 % (+ 1)	4 % (+ 2)	3 % (+ 1)	5 % (=)
Famous performing artists (musicians, singers, actors)	20 % (+ 3)	18 % (– 1)	19 % (+ 2)	23 % (+ 5)	19 % (+ 4)	15 % (=)	19 % (+ 2)	22 % (+ 4)	17 % (=)
Less well-known performing artists (musicians, singers, actors)	6 % (+ 3)	9 % (+ 4)	7 % (+ 3)	5 % (=)	5 % (+ 2)	3 % (=)	6 % (+ 3)	6 % (+ 1)	8 % (+ 3)
Inventors	13 % (– 4)	16 % (+ 2)	14 % (=)	12 % (– 4)	13 % (– 7)	10 % (– 5)	13 % (– 3)	13 % (– 5)	16 % (– 1)
Creators of artistic content like photographers, sculptors, painters	10 % (– 2)	11 % (+ 3)	10 % (=)	10 % (– 1)	10 % (– 4)	5 % (– 5)	10 % (– 1)	12 % (– 1)	11 % (– 2)
Politicians	11 % (+ 5)	11 % (+ 4)	11 % (+ 4)	9 % (+ 4)	12 % (+ 6)	24 % (+ 13)	14 % (+ 6)	7 % (+ 4)	8 % (+ 2)
DK/NA	7 % (– 4)	4 % (– 4)	5 % (– 5)	6 % (– 5)	9 % (– 5)	11 % (– 5)	8 % (– 5)	6 % (– 4)	3 % (– 4)

2.3.1.2 Growing attachment to intellectual property as a value

In 2016, the Europeans surveyed increasingly regard intellectual property as a value and set of principles that protect artistic creation and innovation. A growing proportion of the Europeans surveyed (97 %, + 1 point) recognise the importance of IP in protecting the rights of inventors, creators, and artists, with 82 % responding with the strongest stance, 'totally agree' compared with 77 % in 2013.

This view is shared across age groups, gender, urbanisation and occupation, a similar trend compared with 2013 results. Considering education level, it is the least-educated respondents who are the least likely to agree (95 %), but an increase of 2 points is still observed. Additionally, the most-educated respondents, as well as those living in large towns, are slightly more likely to agree with the importance of protecting the rights of inventors, creators and artists, as 98 % of respondents in each group support this idea (+ 2 points each).

Additionally, European citizens surveyed continue to view IP as an essential regulatory principle, as, in a similar way to 2013, two-thirds (67 %) of the Europeans surveyed believe that a lack of IP protection would impact economic stability, a belief that is echoed across all 28 Member States.

As in 2013, the opinion associating the absence of IP rules with economic chaos is most prevalent among the youngest and the oldest age groups: 73 % of respondents aged 15 to 24, and 70 % of those aged 55 or over share this belief.

Interestingly, and consistently since 2013, the most-educated Europeans are less convinced by this impact (63 %), and the level of understanding of IP does not play any role in this belief. As this might appear contradictory, it reflects the complexity of IP perception.

In further detail:

- 89 % of the Europeans surveyed agree that 'protecting intellectual property is important so no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case' (versus 86 % in 2013);
- 88 % believe that 'protecting intellectual property is important because it contributes to improving and guaranteeing the quality of products and services' (versus 86 % in 2013);
- 67 % think that 'companies that create a lot of IP contribute significantly more than the others to the creation of jobs or growth' (versus 68 % in 2013).

In 2016, respondents show a higher tendency towards protecting intellectual property, driven by those who 'totally agree' with the above statements.

Additionally, while Europeans in 2016 recognise the role of intellectual property in innovation, respondents appear to express more uncertainty in this realm, as 50 % believe that 'strict protection of IP may curb innovation' and 48 % think that 'IP principles are not adapted to the internet' .

22 - Note: This is a new statement in Q5. Q5.1-Q5.7: Please indicate whether you totally agree, tend to agree, tend to disagree or totally disagree with each of the following statements.

The belief that IP curbs innovation appears to be more widespread among the youngest Europeans surveyed: 6 out of 10 respondents aged 15 to 24 agree with this statement (59 %, versus the EU average of 50 %). This belief decreases among the oldest respondents, as 47 % of the Europeans surveyed aged 55 or over share this opinion.

Education and level of understanding of IP also play a part in the way the Europeans surveyed perceive IP protection as curbing innovation, especially when considering the people who disagree with this idea. 49 % of the most-educated Europeans surveyed do not believe that strict protection of IP may curb innovation, compared with only 37 % among the least-educated respondents. The same phenomenon occurs with respect to the understanding of IP: 46 % of the Europeans surveyed who declare they have a good understanding of IP disagree that its strict protection may curb innovation, compared with only 38 % among those who report having a poor understanding of the term intellectual property.

There is also a clear stance among IP infringers in stating that IP may curb innovation. Among both counterfeit-product buyers and people downloading or streaming from illegal sources, 57 % agree with this statement, compared with the EU average of 50 %.

2.3.2 The perception of counterfeiting in Europe

2.3.2.1 Continuing strong condemnation of the purchase of counterfeit products, but a shift towards increasing acceptance

Similar to the 2013 study, the Europeans surveyed in 2016 continue to regard intellectual property as a fundamental value that is tied closely to strong condemnation of counterfeiting, as evidenced by the finding that 7 out of 10 Europeans surveyed say that nothing can rationalise the purchase of counterfeit products (not in terms of luxury products, quality, availability or price). A strong position against counterfeiting persists, as respondents voicing the strongest attitude, 'totally disagree', regarding the idea that counterfeiting is acceptable under certain conditions, are nearly half or over for all the circumstances[23].

23 - Q3.1-Q3.4: Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statements.

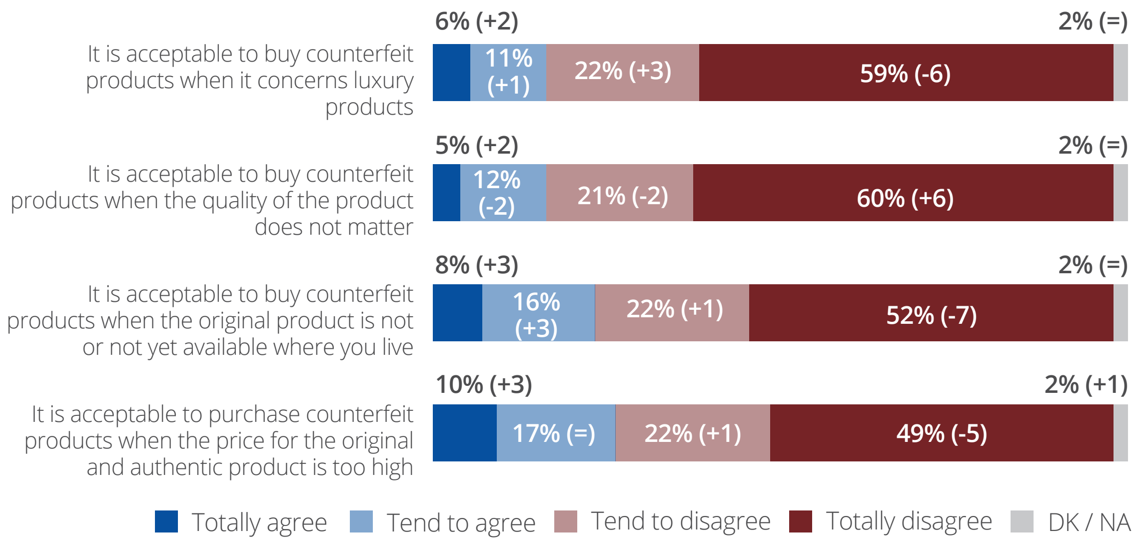
However, while condemnation of counterfeiting remains high, and while still only supported by a minority of the Europeans surveyed, acceptability is increasing, especially regarding price and availability. In detail:

- 81 % of the Europeans surveyed 'disagree' that 'it is acceptable to buy counterfeit products when it concerns luxury products' (versus 84 % in 2013).
- 77 % 'disagree' that 'it is acceptable to buy counterfeit products when the quality of the product does not matter' (versus 81 % in 2013).
- 74 % 'disagree' that 'it is acceptable to buy counterfeit products when the original is not or not yet available where you live' (versus 80 % in 2013).
- And 71 % 'disagree' that 'it is acceptable to purchase counterfeit products when the price for the original and authentic product is too high' (versus 75 % in 2013).

Price appears to be the most powerful driver of acceptance of purchasing counterfeits in 2016, as in 2013 over 50 % of respondents answered with the strongest attitude ('totally disagree') for all the statements listed below, and in 2016, those answering 'totally disagree' regarding price drop to below half[24].

Graph 2. Acceptance of buying counterfeit products. EU-28 average (including evolution since the 2013 study)

Q3 — Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statements:



24 - Q3.1: Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statements.

The 2013 study draws comparisons with the 2011 Special Eurobarometer, *Internal Market: Awareness, Perceptions and Impacts,* albeit with reservations due to a difference in methodology, stating that 'the tendency seems to indicate that within the last two years, Europeans have developed a stronger stance against counterfeiting[25].' Interestingly, this study illustrates the opposite trend.

25 - *European Citizens and Intellectual Property: Perception, Awareness, and Behaviour, 2013.*

The increase in acceptability based on price is consistent across the EU (except for Spain and Italy, which both experience a 3-point decrease in acceptability from 2013 and Latvia, which experiences a 6-point decrease in acceptability). While the 2013 study revealed a significant decrease in acceptability regarding price in Cyprus, Romania, Slovakia, Bulgaria, and the Czech Republic (in comparison with the 2011 Eurobarometer), in 2016, acceptability increases across these countries:

- Czech Republic (27 %, + 9 points)
- Slovakia (36 %, + 9 points)
- Cyprus (50 %, + 8 points)
- Bulgaria (42 %, + 6 points).

Additionally, acceptability of counterfeit products purchasing in terms of price also increases at a remarkably higher rate than the European average in:

- Poland (35 %, + 10 points)
- Finland (23 %, + 8 points).

While a strong stance against counterfeiting is once again observed in most EU Member States, with respondents believing that there are no conditions under which it is acceptable to purchase counterfeit products, three Member States stand out, as the acceptance rate in Cyprus, Lithuania and Malta is substantially above the European average for all four acceptability statements. Most notably, an acceptability rate considerably above the EU average in terms of price is observed in eastern European countries (Bulgaria and Slovenia), the Baltic States (Latvia, Lithuania and Estonia), Cyprus, Greece, and Malta, a continuing trend from the 2013 study.

In detail, the following percentages of respondents from each country consider it to be acceptable to buy counterfeit products when the price of the original product is too high, compared with the European average of 27 %:

- 50 % of Cypriots
- 47 % of Greeks
- 45 % of Lithuanians

- 42 % of Bulgarians
- 41 % of Estonians
- 41 % of Slovenians
- 40 % of Maltese
- 37 % of Latvians.

Detailed results: *Q3.1 — It is acceptable to purchase counterfeit products when the price for the original and authentic product is too high.*

Note: Total Agree = Totally Agree + Tend to Agree and Total Disagree = Totally Disagree + Tend to Disagree

	Total 'Agree'		Total 'Disagree'		Don't Know	
CY	50 % (+ 8)	48 % (– 8)	2 % (=)	13 % (+ 2)	5 % (+ 3)	18 % (+ 5)
EL	47 % (+ 6)	52 % (– 6)	1 % (=)	11 % (– 3)	5 % (=)	16 % (– 3)
LT	45 % (+ 4)	53 % (– 4)	2 % (=)	7 % (– 2)	2 % (– 3)	9 % (– 5)
BG	42 % (+ 6)	57 % (– 5)	1 % (– 1)	12 % (– 3)	4 % (– 2)	16 % (– 5)
EE	41 % (+ 1)	55 % (=)	4 % (– 1)	7 % (– 4)	2 % (– 2)	9 % (– 6)
SI	41 % (+ 4)	57 % (– 5)	2 % (+ 1)	11 % (– 3)	5 % (– 5)	16 % (– 8)
MT	40 % (+ 5)	56 % (– 8)	4 % (+ 3)	15 % (+ 9)	10 % (+ 7)	25 % (+ 16)
BE	37 % (+ 3)	62 % (– 3)	1 % (=)	8 % (=)	7 % (+ 4)	15 % (+ 4)
LV	37 % (– 6)	61 % (+ 7)	2 % (– 1)	16 % (+ 1)	7 % (– 1)	23 % (=)
SK	36 % (+ 9)	59 % (– 12)	5 % (+ 3)	7 % (– 4)	2 % (– 1)	9 % (– 5)
PL	35 % (+ 10)	64 % (– 9)	1 % (– 1)	10 % (– 1)	4 % (– 2)	14 % (– 3)
NL	34 % (+ 7)	65 % (– 7)	1 % (=)	11 % (– 3)	13 % (+ 2)	24 % (– 1)
PT	34 % (+ 3)	63 % (– 3)	3 % (=)	13 % (– 3)	8 % (=)	21 % (– 3)
HR	32 % (+ 5)	65 % (– 6)	3 % (+ 1)	15 % (+ 4)	5 % (+ 2)	20 % (+ 6)
ES	31 % (– 3)	68 % (+ 3)	1 % (=)	7 % (– 3)	35 % (+ 11)	42 % (+ 8)
LU	31 % (+ 5)	69 % (– 4)	0 % (– 1)	13 % (– 5)	7 % (+ 1)	20 % (– 4)
HU	31 % (+ 4)	67 % (– 5)	2 % (+ 1)	21 % (– 5)	16 % (– 3)	37 % (– 8)
IE	28 % (+ 5)	70 % (– 7)	2 % (+ 1)	21 % (– 4)	20 % (+ 3)	41 % (– 1)
EU-28	27 % (+ 3)	71 % (– 4)	2 % (+ 1)	15 % (– 7)	3 % (– 7)	18 % (– 14)
CZ	27 % (+ 9)	71 % (– 9)	2 % (=)	12 % (=)	31 % (– 23)	43 % (– 23)
AT	27 % (+ 3)	72 % (– 2)	1 % (– 1)	14 % (– 1)	4 % (– 3)	18 % (– 4)
SE	27 % (+ 6)	72 % (– 6)	1 % (=)	17 % (– 2)	13 % (+ 7)	30 % (+ 5)
RO	26 % (+ 3)	72 % (– 3)	2 % (=)	20 % (– 4)	11 % (+ 2)	31 % (– 2)
UK	25 % (+ 6)	72 % (– 6)	3 % (=)	21 % (– 3)	11 % (– 2)	32 % (– 5)
DK	24 % (+ 7)	73 % (– 9)	3 % (+ 2)	22 % (– 8)	34 % (+ 10)	56 % (+ 2)
FR	24 % (+ 2)	76 % (=)	0 % (– 2)	27 % (+ 2)	10 % (+ 3)	37 % (+ 5)
FI	23 % (+ 8)	76 % (– 7)	1 % (– 1)	9 % (– 8)	3 % (+ 1)	12 % (– 7)
DE	22 % (+ 6)	76 % (– 7)	2 % (+ 1)	24 % (– 4)	49 % (+ 8)	73 % (+ 4)
IT	19 % (– 3)	80 % (+ 3)	1 % (=)	23 % (– 4)	44 % (+ 13)	67 % (+ 9)

Detailed results: *Q3.2 — It is acceptable to buy counterfeit products when the original product is not or not yet available where you live.*

Note: Total Agree = Totally Agree + Tend to Agree and Total Disagree = Totally Disagree + Tend to Disagree

	Total 'Agree'		Total 'Disagree'		Don't Know	
LT	48 % (+ 9)	49 % (– 9)	3 % (=)	13 % (+ 2)	5 % (+ 3)	18 % (+ 5)
SI	42 % (+ 1)	55 % (– 3)	3 % (+ 2)	11 % (– 3)	5 % (=)	16 % (– 3)
MT	39 % (+ 7)	57 % (– 9)	4 % (+ 2)	7 % (– 2)	2 % (– 3)	9 % (– 5)
EL	37 % (+ 2)	62 % (– 2)	1 % (=)	12 % (– 3)	4 % (– 2)	16 % (– 5)
PT	37 % (+ 9)	60 % (– 9)	3 % (=)	7 % (– 4)	2 % (– 2)	9 % (– 6)
BG	36 % (+ 3)	62 % (– 2)	2 % (– 1)	11 % (– 3)	5 % (– 5)	16 % (– 8)
EE	35 % (+ 2)	59 % (=)	6 % (– 2)	15 % (+ 9)	10 % (+ 7)	25 % (+ 16)
CY	35 % (+ 1)	62 % (– 3)	3 % (+ 2)	8 % (=)	7 % (+ 4)	15 % (+ 4)
SK	34 % (+ 12)	60 % (– 14)	6 % (+ 2)	16 % (+ 1)	7 % (– 1)	23 % (=)
BE	32 % (+ 5)	67 % (– 4)	1 % (– 1)	7 % (– 4)	2 % (– 1)	9 % (– 5)
SE	32 % (+ 8)	66 % (– 9)	2 % (+ 1)	10 % (– 1)	4 % (– 2)	14 % (– 3)
LV	30 % (– 1)	68 % (+ 2)	2 % (– 1)	11 % (– 3)	13 % (+ 2)	24 % (– 1)
AT	29 % (+ 5)	71 % (– 3)	0 % (– 2)	13 % (– 3)	8 % (=)	21 % (– 3)
PL	28 % (+ 9)	70 % (– 9)	2 % (=)	15 % (+ 4)	5 % (+ 2)	20 % (+ 6)
DK	27 % (+ 11)	70 % (– 12)	3 % (– 1)	7 % (– 3)	35 % (+ 11)	42 % (+ 8)
HR	27 % (+ 1)	71 % (=)	2 % (– 1)	13 % (– 5)	7 % (+ 1)	20 % (– 4)
CZ	25 % (+ 9)	72 % (– 8)	3 % (– 1)	21 % (– 5)	16 % (– 3)	37 % (– 8)
LU	25 % (+ 4)	74 % (– 3)	1 % (– 1)	21 % (– 4)	20 % (+ 3)	41 % (– 1)
NL	25 % (+ 3)	73 % (– 3)	2 % (=)	15 % (– 7)	3 % (– 7)	18 % (– 14)
RO	25 % (+ 2)	73 % (– 2)	2 % (=)	12 % (=)	31 % (– 23)	43 % (– 23)
EU-28	24 % (+ 6)	74 % (– 6)	2 % (=)	14 % (– 1)	4 % (– 3)	18 % (– 4)
IE	23 % (+ 6)	74 % (– 8)	3 % (+ 2)	17 % (– 2)	13 % (+ 7)	30 % (+ 5)
ES	23 % (+ 2)	76 % (=)	1 % (– 2)	20 % (– 4)	11 % (+ 2)	31 % (– 2)
HU	22 % (+ 1)	76 % (– 1)	2 % (=)	21 % (– 3)	11 % (– 2)	32 % (– 5)
FI	22 % (+ 10)	77 % (– 8)	1 % (– 2)	22 % (– 8)	34 % (+ 10)	56 % (+ 2)
DE	21 % (+ 5)	77 % (– 5)	2 % (=)	27 % (+ 2)	10 % (+ 3)	37 % (+ 5)
IT	20 % (+ 8)	79 % (– 8)	1 % (=)	9 % (– 8)	3 % (+ 1)	12 % (– 7)
FR	19 % (+ 3)	80 % (– 2)	1 % (– 1)	24 % (– 4)	49 % (+ 8)	73 % (+ 4)
UK	19 % (+ 5)	77 % (– 7)	4 % (+ 2)	23 % (– 4)	44 % (+ 13)	67 % (+ 9)

Detailed results: *Q3.3 — It is acceptable to buy counterfeit products when the quality of the product does not matter.*

Note: Total Agree = Totally Agree + Tend to Agree and Total Disagree = Totally Disagree + Tend to Disagree

	Total 'Agree'		Total 'Disagree'		Don't Know	
CY	37 % (– 1)	62 % (– 2)	1 % (– 1)	13 % (+ 2)	5 % (+ 3)	18 % (+ 5)
SI	35 % (+ 4)	62 % (– 6)	3 % (+ 2)	11 % (– 3)	5 % (=)	16 % (– 3)
LV	34 % (=)	65 % (+ 1)	1 % (– 1)	7 % (– 2)	2 % (– 3)	9 % (– 5)
MT	34 % (+ 4)	62 % (– 6)	4 % (+ 2)	12 % (– 3)	4 % (– 2)	16 % (– 5)
EE	33 % (+ 6)	63 % (– 2)	4 % (– 4)	7 % (– 4)	2 % (– 2)	9 % (– 6)
BE	32 % (=)	67 % (=)	1 % (=)	11 % (– 3)	5 % (– 5)	16 % (– 8)
LT	32 % (+ 9)	65 % (– 10)	3 % (+ 1)	15 % (+ 9)	10 % (+ 7)	25 % (+ 16)
SK	32 % (+ 11)	65 % (– 11)	3 % (=)	8 % (=)	7 % (+ 4)	15 % (+ 4)
EL	31 % (– 1)	67 % (=)	2 % (+ 1)	16 % (+ 1)	7 % (– 1)	23 % (=)
BG	28 % (+ 4)	70 % (– 3)	2 % (– 1)	7 % (– 4)	2 % (– 1)	9 % (– 5)
PL	27 % (+ 9)	70 % (– 9)	3 % (=)	10 % (– 1)	4 % (– 2)	14 % (– 3)
SE	26 % (+ 5)	71 % (– 5)	3 % (=)	11 % (– 3)	13 % (+ 2)	24 % (– 1)
HR	25 % (+ 3)	74 % (– 2)	1 % (– 1)	13 % (– 3)	8 % (=)	21 % (– 3)
DK	24 % (+ 8)	72 % (– 8)	4 % (=)	15 % (+ 4)	5 % (+ 2)	20 % (+ 6)
LU	24 % (+ 2)	75 % (– 2)	1 % (=)	7 % (– 3)	35 % (+ 11)	42 % (+ 8)
HU	24 % (+ 4)	74 % (– 4)	2 % (=)	13 % (– 5)	7 % (+ 1)	20 % (– 4)
NL	24 % (=)	75 % (=)	1 % (=)	21 % (– 5)	16 % (– 3)	37 % (– 8)
PT	24 % (+ 3)	73 % (– 4)	3 % (– 1)	21 % (– 4)	20 % (+ 3)	41 % (– 1)
FR	23 % (+ 5)	76 % (– 3)	1 % (– 2)	15 % (– 7)	3 % (– 7)	18 % (– 14)
AT	23 % (+ 2)	76 % (– 1)	1 % (– 1)	12 % (=)	31 % (– 23)	43 % (– 23)
EU-28	21 % (+ 4)	77 % (– 4)	2 % (=)	14 % (– 1)	4 % (– 3)	18 % (– 4)
ES	21 % (+ 2)	79 % (=)	0 % (– 2)	17 % (– 2)	13 % (+ 7)	30 % (+ 5)
CZ	19 % (+ 6)	79 % (– 6)	2 % (=)	20 % (– 4)	11 % (+ 2)	31 % (– 2)
DE	19 % (+ 7)	79 % (– 7)	2 % (=)	21 % (– 3)	11 % (– 2)	32 % (– 5)
IE	18 % (+ 2)	79 % (– 4)	3 % (+ 2)	22 % (– 8)	34 % (+ 10)	56 % (+ 2)
FI	18 % (+ 4)	81 % (– 2)	1 % (– 2)	27 % (+ 2)	10 % (+ 3)	37 % (+ 5)
UK	18 % (+ 5)	78 % (– 7)	4 % (+ 2)	9 % (– 8)	3 % (+ 1)	12 % (– 7)
RO	17 % (=)	81 % (=)	2 % (=)	24 % (– 4)	49 % (+ 8)	73 % (+ 4)
IT	11 % (– 6)	88 % (– 7)	1 % (– 1)	23 % (– 4)	44 % (+ 13)	67 % (+ 9)

Detailed results: *Q3.4 — It is acceptable to buy counterfeit products when it concerns luxury products.*

Note: Total Agree = Totally Agree + Tend to Agree and Total Disagree = Totally Disagree + Tend to Disagree

	Total 'Agree'		Total 'Disagree'		Don't Know	
LT	33 % (+ 15)	64 % (– 15)	3 % (=)	13 % (+ 2)	5 % (+ 3)	18 % (+ 5)
BG	29 % (+ 10)	69 % (– 9)	2 % (– 1)	11 % (– 3)	5 % (=)	16 % (– 3)
MT	29 % (+ 3)	67 % (– 4)	4 % (+ 1)	7 % (– 2)	2 % (– 3)	9 % (– 5)
CY	27 % (+ 4)	70 % (– 4)	3 % (=)	12 % (– 3)	4 % (– 2)	16 % (– 5)
BE	25 % (+ 2)	74 % (– 2)	1 % (=)	7 % (– 4)	2 % (– 2)	9 % (– 6)
EL	25 % (+ 2)	74 % (– 1)	1 % (– 1)	11 % (– 3)	5 % (– 5)	16 % (– 8)
SI	24 % (+ 3)	74 % (– 4)	2 % (+ 1)	15 % (+ 9)	10 % (+ 7)	25 % (+ 16)
LU	22 % (+ 6)	78 % (– 5)	0 % (– 1)	8 % (=)	7 % (+ 4)	15 % (+ 4)
SK	22 % (+ 4)	73 % (– 6)	5 % (+ 2)	16 % (+ 1)	7 % (– 1)	23 % (=)
SE	22 % (+ 4)	76 % (– 4)	2 % (=)	7 % (– 4)	2 % (– 1)	9 % (– 5)
ES	20 % (+ 3)	79 % (– 3)	1 % (=)	10 % (– 1)	4 % (– 2)	14 % (– 3)
IE	19 % (+ 6)	78 % (– 8)	3 % (+ 2)	11 % (– 3)	13 % (+ 2)	24 % (– 1)
LV	19 % (=)	78 % (=)	3 % (=)	13 % (– 3)	8 % (=)	21 % (– 3)
EE	18 % (+ 4)	74 % (– 3)	8 % (– 1)	15 % (+ 4)	5 % (+ 2)	20 % (+ 6)
NL	18 % (+ 4)	81 % (– 4)	1 % (=)	7 % (– 3)	35 % (+ 11)	42 % (+ 8)
PL	18 % (+ 5)	79 % (– 5)	3 % (=)	13 % (– 5)	7 % (+ 1)	20 % (– 4)
PT	18 % (+ 2)	78 % (– 3)	4 % (+ 1)	21 % (– 5)	16 % (– 3)	37 % (– 8)
EU-28	17 % (+ 3)	81 % (– 3)	2 % (=)	21 % (– 4)	20 % (+ 3)	41 % (– 1)
DK	17 % (+ 5)	80 % (– 6)	3 % (+ 1)	15 % (– 7)	3 % (– 7)	18 % (– 14)
HR	17 % (+ 4)	81 % (– 3)	2 % (– 1)	12 % (=)	31 % (– 23)	43 % (– 23)
UK	17 % (+ 4)	79 % (– 6)	4 % (+ 2)	14 % (– 1)	4 % (– 3)	18 % (– 4)
HU	16 % (+ 4)	81 % (– 4)	3 % (=)	17 % (– 2)	13 % (+ 7)	30 % (+ 5)
AT	16 % (=)	83 % (=)	1 % (=)	20 % (– 4)	11 % (+ 2)	31 % (– 2)
RO	16 % (+ 1)	82 % (– 1)	2 % (=)	21 % (– 3)	11 % (– 2)	32 % (– 5)
DE	15 % (+ 3)	83 % (– 4)	2 % (+ 1)	22 % (– 8)	34 % (+ 10)	56 % (+ 2)
FI	15 % (+ 4)	84 % (– 2)	1 % (– 2)	27 % (+ 2)	10 % (+ 3)	37 % (+ 5)
FR	14 % (– 1)	85 % (+ 2)	1 % (– 1)	9 % (– 8)	3 % (+ 1)	12 % (– 7)
CZ	13 % (+ 4)	85 % (– 4)	2 % (=)	24 % (– 4)	49 % (+ 8)	73 % (+ 4)
IT	11 % (=)	88 % (+ 1)	1 % (– 1)	23 % (– 4)	44 % (+ 13)	67 % (+ 9)

Age is once again the most significant variable in determining opinions on counterfeiting. Similar to 2013, acceptance of purchasing counterfeit products decreases consistently with age, although, in 2016, acceptability increases across age groups. The highest acceptability rate is in terms of price, as 41 % (+ 7 points) of respondents aged 15 to 24 believe it is acceptable to purchase counterfeit products if the original product is too expensive, compared with the EU average of 27 % and 23 % (+ 5 points) of respondents aged 55 or over.

As regards the acceptability of purchasing counterfeit goods due to price, manual workers continue to be the most likely to express an accepting attitude (29 %, + 2 points) compared with other occupations; however, it is the respondents who are not currently employed that show the largest evolution from 2013 (28 %, + 4 points). Similarly, men are still more likely than women to accept counterfeit purchasing based on price, but women's acceptance is increasing at a higher rate than men's over time: 28 % of men (+ 2 points) and 27 % of women (+ 5 points) believe it is justifiable to purchase counterfeit goods when the price for the original and authentic product is too high. A shift in perception regarding urbanisation is also noted in this study, as in 2013, respondents in rural areas were the least likely to justify counterfeit purchases based on price. However, this study shows a 4-point increase in agreement (27 %), making these respondents the most likely to justify buying counterfeit goods, along with those in small/medium-sized towns (27 %, + 2 points).

Detailed results: Acceptability of counterfeit purchasing according to age.

Q3.1 — It is acceptable to purchase counterfeit products when the price for the original and authentic product is too high.

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't Know
EU-28	10 % (+ 3)	17 % (=)	22 % (+ 1)	49 % (– 5)	2 % (+ 1)
15-24 years	14 % (+ 5)	27 % (+ 2)	29 % (=)	29 % (– 7)	1 % (=)
25-39 years	9 % (+ 1)	20 % (=)	26 % (+ 3)	44 % (– 4)	1 % (=)
40-54 years	9 % (+ 3)	16 % (=)	21 % (+ 1)	53 % (– 3)	1 % (– 1)
55 + years	9 % (+ 4)	14 % (+ 1)	18 % (+ 2)	56 % (– 8)	3 % (+ 1)

Detailed results: Acceptability of counterfeit purchasing according to age.

Q3.2 — It is acceptable to buy counterfeit products when the original product is not or not yet available where you live.

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't Know
EU-28	8 % (+ 3)	16 % (+ 3)	22 % (+ 1)	52 % (– 7)	2 % (=)
15-24 years	14 % (+ 5)	25 % (+ 3)	28 % (+ 2)	32 % (– 10)	1 % (=)
25-39 years	7 % (+ 1)	17 % (+ 2)	25 % (+ 2)	49 % (– 6)	2 % (+ 1)
40-54 years	7 % (+ 3)	13 % (+ 2)	21 % (=)	57 % (– 6)	2 % (+ 1)
55 + years	8 % (+ 4)	13 % (+ 2)	19 % (+ 2)	58 % (– 7)	2 % (– 1)

Detailed results: Acceptability of counterfeit purchasing according to age.

Q3.3 — It is acceptable to buy counterfeit products when the quality of the product does not matter.

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't Know
EU-28	7 % (+ 2)	14 % (+ 2)	23 % (+ 2)	54 % (– 6)	2 % (=)
15-24 years	10 % (+ 3)	25 % (+ 3)	31 % (=)	33 % (– 6)	1 % (=)
25-39 years	8 % (+ 2)	16 % (+ 2)	27 % (+ 5)	48 % (– 8)	1 % (– 1)
40-54 years	7 % (+ 3)	11 % (=)	21 % (+ 1)	59 % (– 4)	2 % (=)
55 + years	7 % (+ 2)	9 % (+ 1)	19 % (+ 4)	62 % (– 7)	3 % (=)

Detailed results: Acceptability of counterfeit purchasing according to age.

Q3.4 — It is acceptable to buy counterfeit products when it concerns luxury products.

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't Know
EU-28	6 % (+ 2)	11 % (+ 1)	22 % (+ 3)	59 % (– 6)	2 % (=)
15-24 years	7 % (+ 1)	21 % (+ 4)	31 % (+ 4)	39 % (– 10)	2 % (+ 1)
25-39 years	5 % (=)	12 % (+ 1)	26 % (+ 3)	56 % (– 4)	1 % (=)
40-54 years	5 % (+ 2)	10 % (+ 1)	21 % (+ 2)	62 % (– 5)	2 % (=)
55 + years	6 % (+ 3)	8 % (+ 1)	18 % (+ 4)	66 % (– 7)	2 % (– 1)

2.3.2.2 An overall acknowledged, but weakening, perception of counterfeiting's negative impact on the economy

Once again, as in 2013, the image test of counterfeiting enables exploration into the most compelling arguments in the opinions of European citizens. Out of the four arguments tested (negative impact on the economy; encouraging illegal trafficking; threat to public health; discouraging innovation), the economic factor continues to discourage counterfeit purchasing the most, as 78 % of Europeans believe that purchasing counterfeit products ruins businesses and jobs. However, the proportion of those who do not acknowledge the damage of counterfeiting is increasing. In 2013, 81 % of the Europeans surveyed considered that 'buying counterfeit products ruins businesses and jobs', compared with 78 % in 2016[26]. Similar to the 2013 study, at least two thirds of citizens interviewed in all the EU countries, except Romania, share this opinion. The European citizens surveyed 'disagree' with a 3-point increase from 2013, with Romania (+ 7 points) and Cyprus (+ 8 points) reporting the highest evolution in the number of respondents who do not acknowledge the negative impact of counterfeiting on businesses and jobs.

26 - Q3.7: Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statements.

The criminalisation of counterfeiting is once again the second strongest argument, as 68 % of the Europeans surveyed agree that 'buying counterfeit products supports child labour and illegal trafficking' (versus 71 % in 2013)[27]. While the majority of respondents share this opinion in most EU Member States, people interviewed in four Member States express more disagreement and do not feel there is a link between counterfeiting and child labour and illegal trafficking, leading to a 4-point increase in disagreement with this statement overall for EU-28:

27 - Q3.8: Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statements.

- 50 % of Romanians (+ 8 points since 2013)
- 44 % of Poles (+ 6 points)
- 43 % of Spaniards (+ 11 points)
- 42 % of Maltese (+ 13 points).

66 % of Europeans agree that counterfeiting 'poses a threat to health', a slight decrease from 2013 (67 %). Once again, this argument is persuasive across the majority of EU Member States, except for:

- Denmark (48 %, + 8 points)
- Netherlands (47 %, + 1 point).

The negative impact of purchasing counterfeit products on innovation is the least-accepted argument overall and is even less evident to Europeans in 2016 than it was in 2013. Only 49 % of Europeans believe that purchasing counterfeit products discourages innovation, a 4-point decrease compared with 2013[28]. Recognition of the negative impact that counterfeiting has on innovation decreases across most EU Member States, as only the following countries show an increase in agreement:

28 - Q3.10: Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statements.

- Estonia (63 %, + 5 points)
- Finland (63 %, + 4 points)
- United Kingdom (52 %, + 2 points)
- Netherlands (46 %, + 4 points)
- Denmark (46 %, + 3 points)
- Austria (46 %, + 3 points)
- Germany (45 %, + 1 point).

While the percentage of respondents who agree with the statement in Germany, the Netherlands, and Austria increases, the majority still do not recognise the negative impact that purchasing counterfeit products has on innovation.

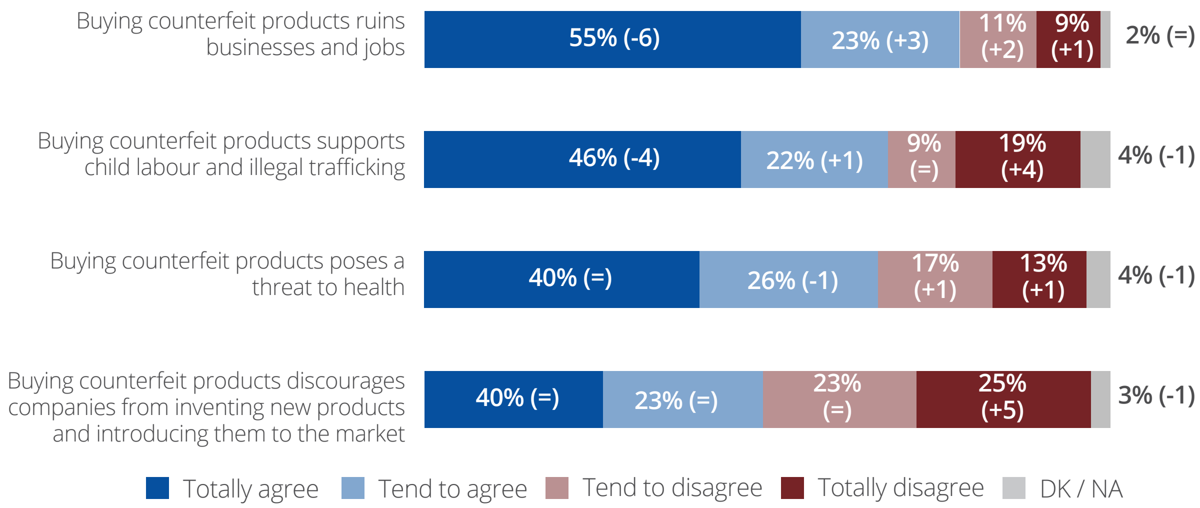
The most significant increase in respondents who 'disagree' that counterfeiting can discourage innovation occurs in:

- Cyprus (51 %, + 15 points)
- Romania (44 %, + 13 points)
- Bulgaria (40 %, + 10 points)
- Spain (44 %, + 10 points)
- Poland (54 %, + 10 points)
- Slovakia (49 %, + 10 points).

Once again, the younger generations are the least convinced by this argument, but the opinion is more evenly spread across age groups in 2016. While the younger generations' level of disagreement increases by only 1 point (49 % versus 48 % in 2013), the two older generations' disagreement increases significantly: 48 % of 40 to 54-year olds (+ 6 points) and 45 % of respondents over the age of 55 (+ 9 points) do not see counterfeiting as something that discourages innovation and the invention of new products.

Additionally, respondents living in urban settings (49 %, + 6 points) and those employed as manual workers (51 %, + 12 points) are the least likely to recognise the negative impact buying counterfeit products has on innovation, as they disclose higher levels of disagreement with the idea than their counterparts.

Graph 3. Perceptions of counterfeit products purchasing. EU-28 average (including evolution since the 2013 study)

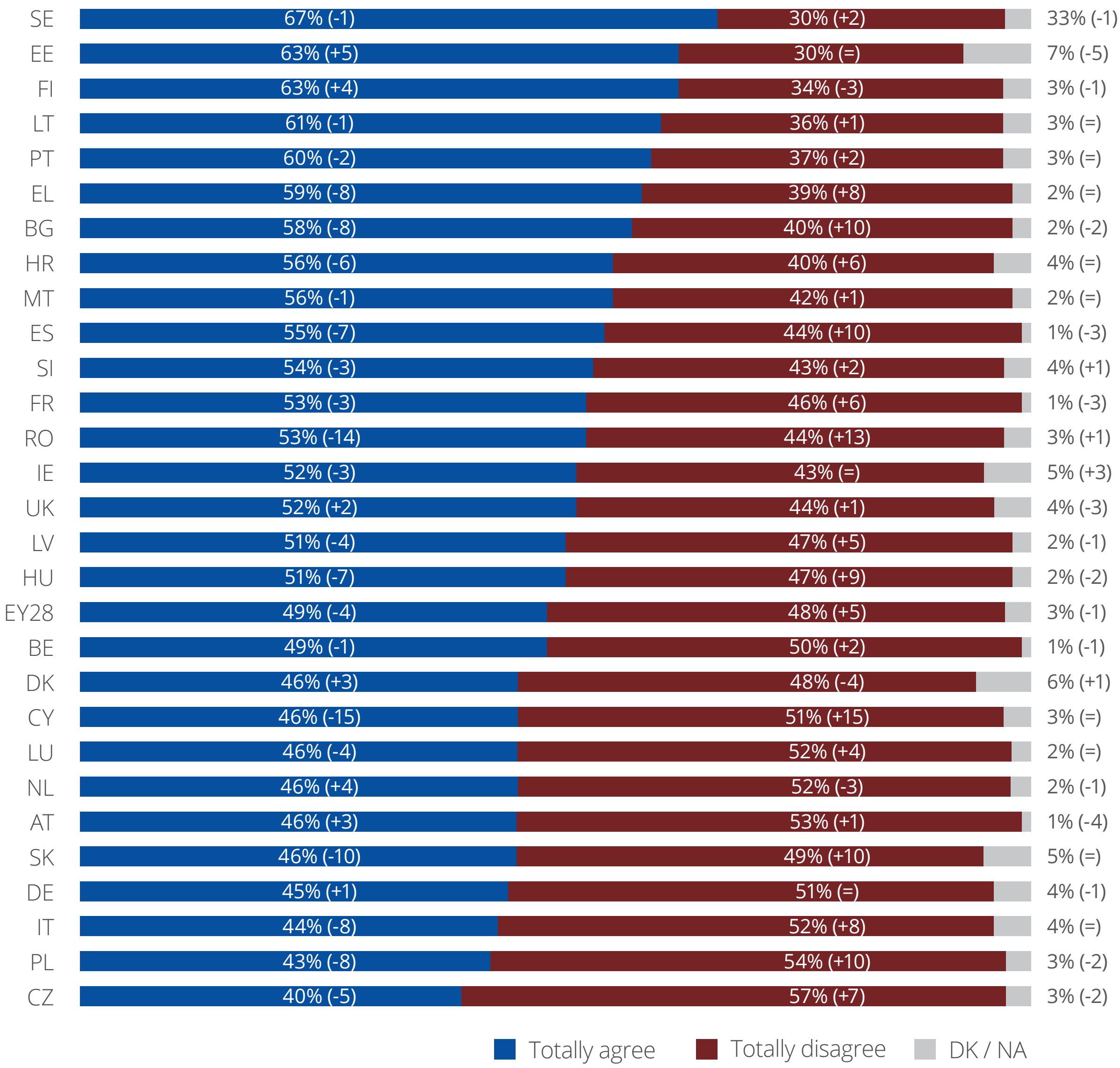


As the statement regarding innovation is the most challenged among the Europeans surveyed, a breakdown by Member State is included in Graph 4.

Graph 4. Counterfeiting can discourage innovation. EU-28 average (including evolution since the 2013 study)

Q3.10 — Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statement: Buying counterfeit products discourages companies from inventing new products and introducing them to the market.

Note: Total Agree = Totally Agree + Tend to Agree and Total Disagree = Totally Disagree + Tend to Disagree



While the level of acknowledgement of the negative impact counterfeiting has on the economy, human trafficking, public health, and innovation decreases, so does the rationalisation for purchasing counterfeit products to improve one's purchasing power, or as an act of protest and a way to resist the market-driven economy and large premium brands.

34 % of Europeans (a 4-point decrease compared with 2013) consider purchasing counterfeits to be 'an act of protest and a way to resist the market-driven economy and the large premium brands', while 62 % do not share this opinion[29]. A significantly higher proportion of respondents in only four EU Member States view purchasing counterfeits as an act of protest:

29 - Q3.12: Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statements.

- Cyprus (55 %, – 7 points)
- Slovenia (54 %, – 4 points)
- Malta (52 %, – 2 points)
- Lithuania (51 %, – 4 points).

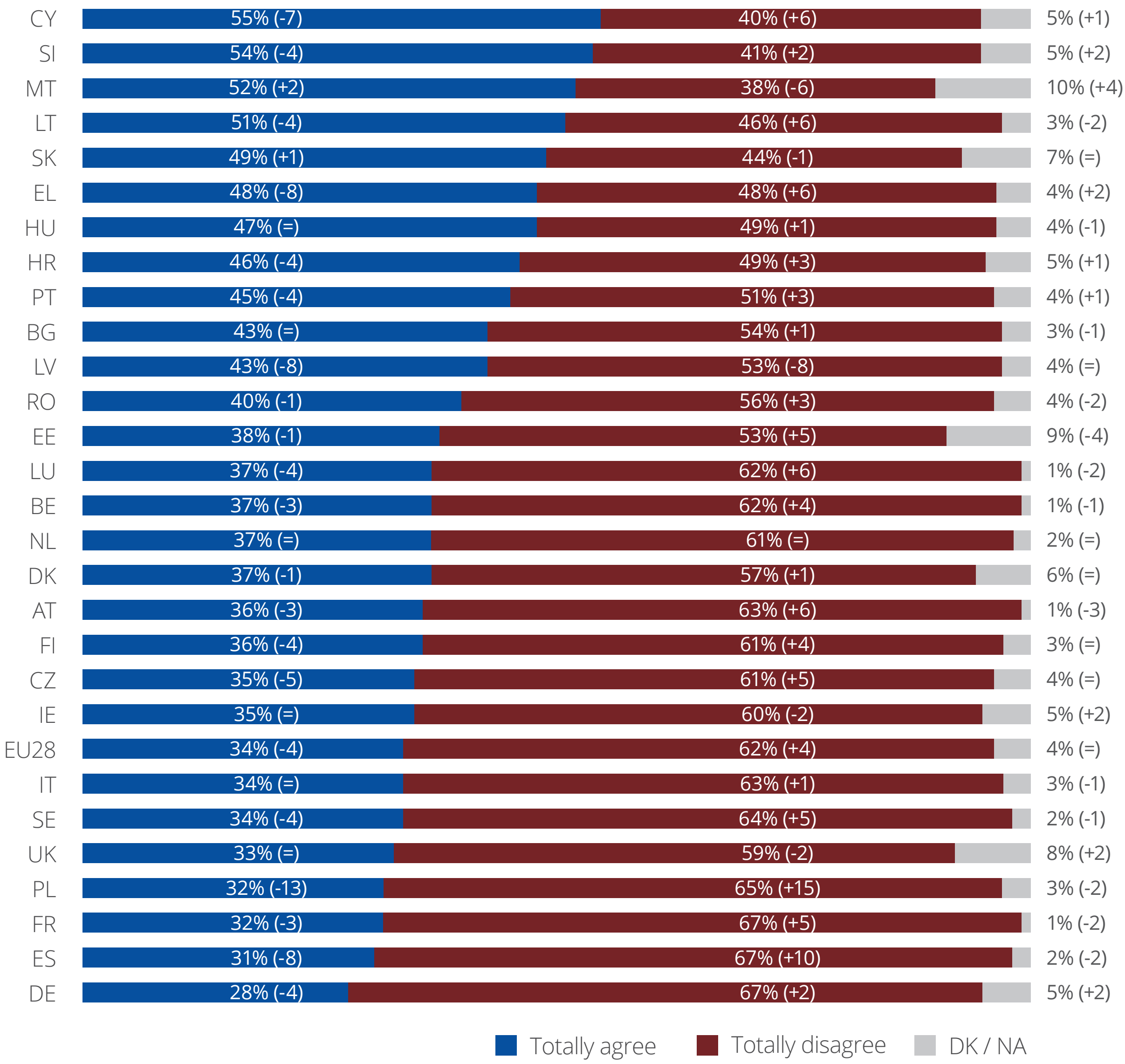
As in 2013, age continues to be an important variable with respect to counterfeiting, with the younger age groups viewing the act of counterfeiting as an act of protest at a higher rate than people over the age of 55, but decreasingly so. Socio-economic standing appears to have an impact on opinion, as manual workers and those who are unemployed are more likely to agree that counterfeiting is an act of protest compared with their self-employed counterparts.

Regarding the belief that purchasing counterfeit products is an act of protest, 45 % of respondents aged 15 to 24 (– 3 points) and 39 % of manual workers (– 5 points) agree with the idea. Men and women share this view point equally, as 34 % of men (– 5 points) and 34 % of women (– 3 points) view the behaviour as a way to protest. Similar to 2013, respondents living in large towns are slightly less likely to share this belief with their counterparts in rural areas and small/medium-sized towns. 33 % of the Europeans surveyed in large towns (– 3 points) say purchasing counterfeits is an act of protest, compared with 35 % of respondents in both rural areas (– 3 points) and small/medium-sized towns (– 4 points).

Graph 5. Counterfeiting as an act of protest. EU-28 average (including evolution since the 2013 study)

Q3.12 — *Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statement: 'Buying counterfeit products is an act of protest and a way to resist to the market-driven economy and the large premium brands.'*

Note: Total Agree = Totally Agree + Tend to Agree and Total Disagree = Totally Disagree + Tend to Disagree



Similar to the declining trend in viewing counterfeit purchases as an act of protest, Europeans surveyed also decreasingly view the act of purchasing counterfeits as one of resourcefulness (30 %, – 4 points)[30]. This shift in opinion occurs across the EU Member States, except for Ireland (+ 2 points), Malta (+ 2 points) and Portugal (+ 1 point), which is an interesting trend to consider, as respondents in these three countries show an increasing acceptance of counterfeiting across situations. This suggests that respondents' motives for purchasing counterfeit products are not an act of protest nor a statement about their purchasing power, they merely want products that are readily available at an affordable price. The countries that seem most receptive to the argument that counterfeiting is a way to protect purchasing power are:

30 - Q3.11: Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statements.

- Lithuania (50 %, – 5 points)
- Malta (48 %, + 2 points)
- Netherlands (43 %, – 4 points)
- Cyprus (43 %, – 5 points)
- Portugal (43 %, + 1 point).

Similar to the 2013 study, differences in age appear to explain differences in perception, the oldest generation being least likely to view purchasing counterfeits as an act of resourcefulness. Nearly three quarters (73 %) of respondents aged 55 or over disagree and only 50 % aged 15 to 24 share this view, the youngest generation once again showing more willingness to justify purchasing counterfeits[31].

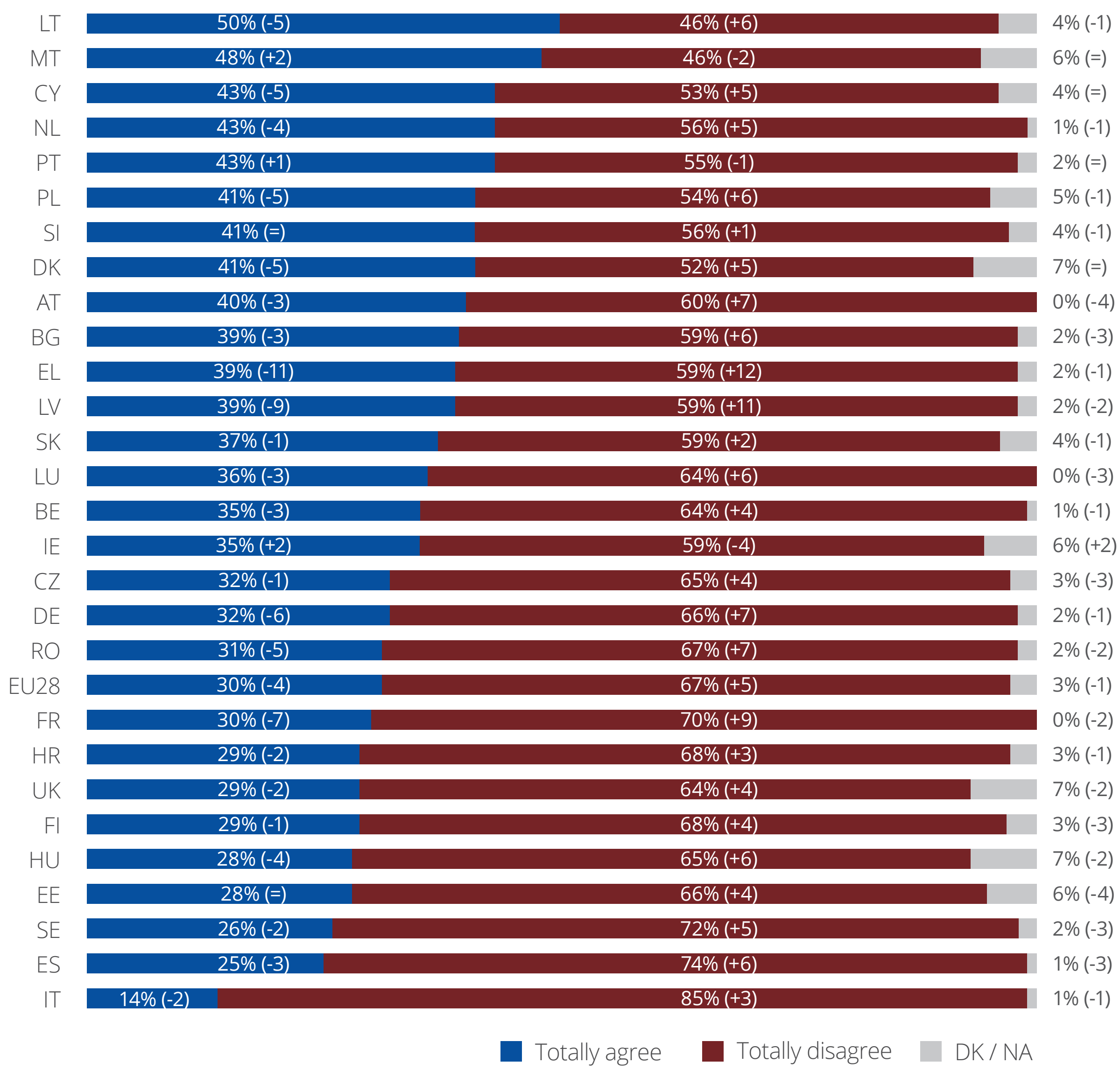
31 - Q4a.1-4a.3: During the past 12 months, which of the following have you done?

Results show that the youngest generation, manual workers, men, and respondents in rural locations are the most receptive to the idea that purchasing counterfeits is an act of resourcefulness. 48 % of respondents aged 15 to 24 (– 4 points) and 36 % of manual workers (– 2 points) consider buying counterfeit goods a smart purchase that can preserve purchasing power. In terms of gender, 32 % of men (– 3 points) and 29 % of women (– 4 points) share this opinion. Respondents in rural locations are slightly more likely to agree with this idea, with 32 % of the Europeans interviewed in rural locations (– 4 points) viewing purchasing of counterfeit goods as a smart purchase, compared with 29 % in small/medium-sized towns (– 5 points), and 30 % of the respondents in large towns (– 4 points).

Graph 6. Counterfeiting as a smart purchase. EU-28 average (including evolution since the 2013 study)

Q3.11 — *Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statement: 'Buying counterfeit products allows making a smart purchase that enables you to have the items that you wanted while preserving your purchasing power.'*

Note: Total Agree = Totally Agree + Tend to Agree and Total Disagree = Totally Disagree + Tend to Disagree



In summary, condemnation of counterfeiting remains high, but has decreased since the 2013 study. At a macro level, the economic and social impact of counterfeit products purchasing is recognised, but decreasingly so in comparison with the 2013 study, and the negative impact on innovation is not as recognised. This is most evident among the younger generations, who recognise the negative effects at a much lower level than the European average, as three out of ten young people declare acceptance of purchasing counterfeits, particularly as regards price, where this number increases to 4 out of 10.

2.3.2.3 Declared purchase of counterfeits remains low, but increases in comparison with 2013

While very few of the Europeans interviewed disclose having intentionally purchased counterfeit products, the number increases from 2013, as 7 % of the respondents admit this behaviour, compared with only 4 % in the 2013 study. 10 % of the Europeans surveyed say they have purchased counterfeits as a result of being misled (versus 6 % in 2013). Additionally, a notable proportion (35 %) of Europeans have wondered whether a product they purchased was genuine or counterfeit, showing that many citizens have faced the issue of counterfeiting and suggesting that Europeans are collectively aware of/concerned by the unethical nature of counterfeiting[32].

32 - Q4a.1-4a.3: During the past 12 months, which of the following have you done?

Among those who admit to intentionally purchasing counterfeit products, there is an observable over-representation of young people and working-class respondents, as 15 % of those aged 15 to 24 admit having intentionally purchased counterfeit products, compared with the European average of 7 %, and only 4 % of respondents aged 55 or over. This is a significant 9-point increase compared with the 2013 study, where only 6 % of those aged 15 to 24 did so. Additionally, 11 % of manual workers report intentionally purchasing counterfeit goods, compared with 5 % of manual workers in 2013. Interestingly, 8 % of men and 6 % of women also admit they have intentionally purchased counterfeit products, a 3-point increase for both target groups compared with the 2013 study.

The declared rate of intentional counterfeit purchasing is highest in Cyprus, Lithuania, Slovenia, Bulgaria, Romania and Malta, where rates have at least doubled since 2013.

In detail:

- Cyprus: 18 % compared with 9 % in 2013
- Lithuania: 18 % compared with 9 % in 2013
- Slovenia: 17 % compared with 5 % in 2013
- Bulgaria: 16 % compared with 8 % in 2013
- Romania: 13 % compared with 7 % in 2013
- Malta: 13 % compared with 4 % in 2013.

Similar to the 2013 study, respondents in Romania and Bulgaria disclose that they have purchased counterfeit products as a result of being misled at a remarkably higher rate than the European average. In 2016, 39 % (versus 23 % in 2013) of Romanians and 31 % (versus 19 % in 2013) of Bulgarians report this behaviour, compared with the 10 % European average.
While in 2013, the youngest generation was the most likely to have purchased counterfeit products as a result of being misled, in this survey, the respondents aged 25 to 39 disclose this behaviour at a higher rate. 12 % of the respondents aged 25 to 39 say they have purchased counterfeit products due to being misled (+ 6 points), whereas 11 % of those aged 15 to 24 admit the same behaviour (+ 4 points). Similar to 2013, manual workers respond at a higher level regarding purchasing counterfeit products as a result of being misled (14 %, + 5 points) compared with other occupations. Additionally, in this survey, an important increase is noticed among respondents who are self-employed, as 12 % of self-employed respondents say they bought counterfeits as a result of being misled — a 7-point increase from 2013. The urbanisation of respondents does not appear to have an impact on unintentional purchasing of counterfeit goods; as evidenced by similar response rates and evolution from 2013 across respondents in rural locations (11 %, + 5 points), small and medium-sized towns (10 %, + 5 points), and large towns (10 %, + 4 points). Men and women continue to do so at similar levels, with 11 % of men (+ 5 points) and 9 % of women (+ 4 points) interviewed saying they purchased counterfeits after being misled.

Just as the increase in the acceptability of counterfeits appears to be driven by price, the same is observed regarding those who have intentionally purchased a counterfeit product within the last 12 months, as the availability of affordable products is the main reason that would make counterfeit buyers stop this behaviour, ahead of a personal bad experience and the risk of punishment. 63 % of intentional counterfeit purchasers say the 'availability of affordable original products' would make them stop this behaviour, followed by 'personal bad experience with a counterfeit product' (41 %), and the 'risk of punishment' (33 %).

As regards the main reason that would make the Europeans surveyed stop purchasing counterfeit products, respondents aged 15 to 24 stand out, as 72 % of the younger generation attribute the behaviour to price, compared with 58 % of respondents aged 55 or over. Additionally, the most-educated respondents (65 %), men (65 %) and manual workers (67 %) are also the most likely to cite availability of affordable products as the primary reason that would make them stop purchasing counterfeit products. Urbanisation does not appear to be an important variable in this context.

Considering the second most important reason for stopping this behaviour, a personal bad experience with a counterfeit product, age once again emerges as an important variable. 51 % of those aged 15 to 24 give this reason, compared with 34 % of respondents aged 55 or over. Furthermore, respondents with the least education (45 %) and those who live in small/medium-sized towns (45 %) are also more likely than their counterparts to name a personal bad experience as a reason to stop purchasing counterfeit goods.

2.3.3 Europeans, youth and the digital world

2.3.3.1 Preference for legal offers and increasing use of paid services, but also, increasing acceptability and use of illegal sources

While the general acceptability of copyright infringement behaviour decreases (35 % of the Europeans surveyed 'agree' that 'it is acceptable to obtain content illegally from the internet when it is for my personal use', compared with 42 % in 2013), consumption needs appear to prevail over legal concerns, as 31 % (+ 9 points) of respondents believe that 'it is acceptable to obtain content illegally from the internet when there is no immediately available legal alternative[33].'

33 - Q3.5-Q3.6: Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statements.

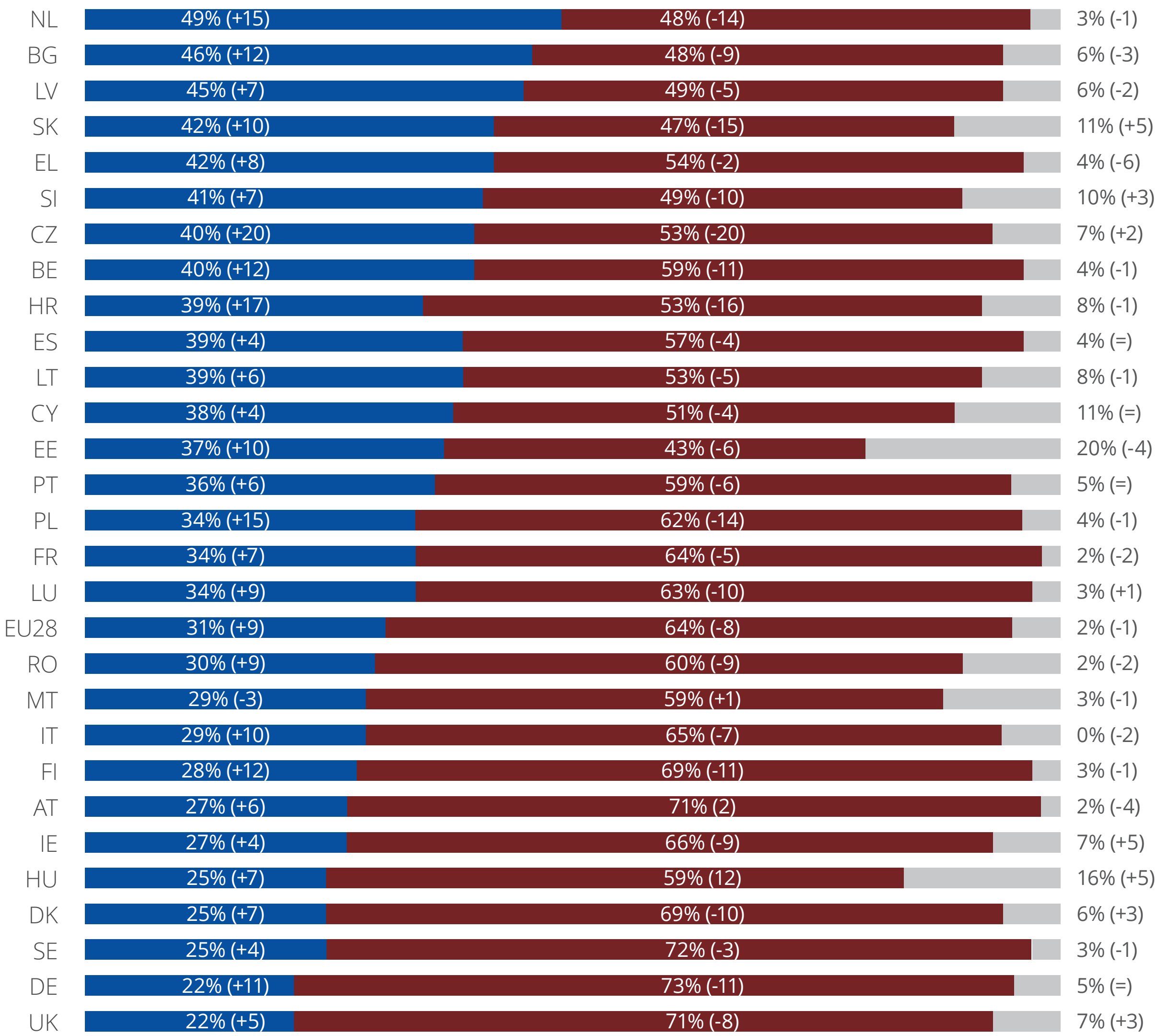
Acceptability in terms of availability is highest in the following countries:

- Netherlands (49 %, + 15 points)
- Bulgaria (46 %, + 12 points)
- Latvia (45 %, + 7 points)
- Greece (42 %, + 8 points)
- Czech Republic (40 %, + 20 points).

Graph 7. Acceptability of illegal sources based on availability. EU-28 average (including evolution since the 2013 study)

Q3.5 — *Please tell me if you totally agree, tend to agree, tend to disagree or totally disagree with the following statement: It is acceptable to obtain content illegally from the internet when there is no immediately available legal alternative.*

Note: Total Agree = Totally Agree + Tend to Agree and Total Disagree = Totally Disagree + Tend to Disagree



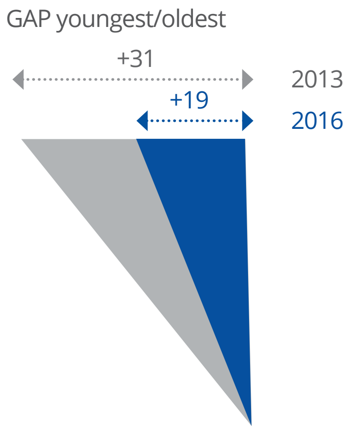
Similar to 2013, the level of acceptability of illegal downloading when there is no immediately available legal alternative decreases with age. However, in this study there is an observable tightening of the gap between the younger and older generations.

- 43 % of respondents aged 15 to 24 agree, compared with 42 % in 2013 — an insignificant change
- 38 % of respondents aged 25 to 39- agree, compared with 29 % in 2013 — a 9-point increase
- 29 % of respondents aged 40 to 54 agree, compared with 18 % in 2013 — an 11-point increase
- And the most significant increase: 24 % of respondents aged 55 or over agree, compared with only 11 % in 2013 — a 13-point increase.

Detailed results: Acceptability of obtaining online content illegally based on availability.

Q3.5 — *It is acceptable to obtain content illegally from the internet when there is no immediately available legal alternative.*

	2013	2016	EVOLUTIONS
55+ yrs	11 %	24 %	+13
40-54 yrs	18 %	29 %	+11
25-39 yrs	29 %	38 %	+9
15-24 yrs	42 %	16 %	+1



+31 pts is the gap observed betwen the youngest Europeans and the oldest ones in 2013, whereas this gap is 19 pts in 2016

Even if an increasing proportion of citizens state that infringing behaviour can be justified when no legal alternative is available, a large and increasing majority of the Europeans surveyed would choose the legal offer over illegal sources. There is a clear preference for using legal means to access content online when an affordable option is available: 83 % of the Europeans surveyed say they prefer to 'access/download/stream content through authorised platforms' and do not use illegal means[34].

34 - Q7.3: For each of the following statements regarding lawful services offering content protected by copyright and related rights (music, films etc.) on the internet, please indicate whether you totally agree, tend to agree, tend to disagree or totally disagree.

Only 8 % of the Europeans surveyed declare they would not necessarily go for the legal option even if it were available and an affordable option. This proportion is unsurprisingly much higher among copyright infringers, with 15 % of counterfeit-product buyers and 20 % of people downloading or streaming illegally sharing this opinion and it is also shared among the youngest Europeans surveyed. 13 % of respondents aged 15 to 24 would still use the illegal option. However, this proportion has dropped by 4 points compared with 2013, while decreasing by 2 points overall. This decline is consistent with the increase in the use of lawful services by the youngest Europeans.

This preference for legal offers is also supported by the growing number of Europeans using legal offers, as 27 % of the Europeans surveyed (+ 7 points) state that they have paid to access/download/stream content online, while 10 % (versus 9 % in 2013) disclose intentionally using illegal sources online. Nordic and western European countries report the highest level of legal behaviour related to accessing online content, as the following countries have the highest percentage of citizens paying for online content:

- Denmark (47 %, + 8 points)
- Netherlands (44 %, + 16 points)
- Luxembourg (44 %, + 15 points)
- Sweden (44 %, + 9 points)
- United Kingdom (42 %, + 10 points)
- Finland (38 %, + 10 points).

Detailed results: Europeans' use of illegal and legal sources on the internet.

Q4b — *During the past 12 months, have you done any of the following?*

	Accessed or downloaded or streamed content from illegal online sources intentionally	Paid to access, download or stream copy-right protected content from a lawful service on the internet (for instance music, video, film or TV series)
SI	20 % (+ 3)	18 % (+ 4)
BE	16 % (+ 1)	25 % (+ 5)
ES	16 % (– 1)	24 % (+ 6)
FR	15 % (+ 1)	26 % (+ 9)
NL	15 % (+ 1)	44 % (+ 16)
CY	14 % (+ 3)	20 % (+ 8)
LV	14 % (– 6)	18 % (– 2)
LT	14 % (– 2)	26 % (+ 14)
IE	13 % (– 3)	34 % (=)
LU	13 % (+ 3)	44 % (+ 15)
SE	13 % (– 1)	44 % (+ 9)
EL	12 % (=)	12 % (+ 3)
HR	12 % (=)	14 % (+ 8)
EE	11 % (– 5)	20 % (+ 9)
EU-28	10 % (+ 1)	27 % (+ 7)
CZ	10 % (– 1)	22 % (+ 3)
DK	10 % (=)	47 % (+ 8)
MT	9 % (– 2)	13 % (=)
AT	9 % (+ 1)	31 % (+ 15)
BG	8 % (– 6)	18 % (+ 6)
SK	8 % (– 3)	20 % (+ 7)
UK	8 % (+ 3)	42 % (+ 10)
DE	7 % (+ 3)	29 % (+ 11)
IT	7 % (+ 2)	16 % (+ 6)
PL	7 % (– 3)	27 % (=)
PT	7 % (– 6)	14 % (+ 3)
FI	7 % (– 3)	38 % (+ 10)
HU	6 % (+ 1)	17 % (+ 7)
RO	5 % (– 3)	17 % (+ 7)

As regards both legal and illegal sources, an over-representation of youth, and to a lesser extent, urbanised and educated people, is observed. While respondents aged 15 to 24 (41 %, + 8 points) and those aged 25 to 39 (41 %, + 12 points) are the most likely to have already paid to use a lawful service, they are also the most likely to have intentionally accessed content using illegal sources: 27 % of respondents aged 15 to 24 (+ 1 point) and 18 % of those aged 25 to 39 (+ 4 points).

Detailed results: Online behaviour according to age, level of education and urbanisation.

Q4 — During the past 12 months, have you done any of the following?

		Accessed or downloaded or streamed content from illegal online sources intentionally	Paid to access, download or stream copyright protected content from a lawful service on the internet (for instance music, video, film or TV series)
Age	15-24	27 % (+ 1)	41 % (+ 8)
	25-39	18 % (+ 4)	41 % (+ 12)
	40-54	7 % (+ 1)	30 % (+ 10)
	55 +	2 % (+ 1)	12 % (+ 5)
Education level	15 –	2 % (– 1)	10 % (+ 5)
	16-19	7 % (+ 1)	22 % (+ 6)
	20 +	11 % (+ 1)	32 % (+ 8)
	Still studying	29 % (+ 2)	41 % (+ 9)
Urbanisation	Rural village	8 % (– 1)	25 % (+ 7)
	Small/ medium-sized town	9 % (=)	26 % (+ 8)
	Large town	13 % (+ 3)	30 % (+ 7)

While there is a significant increase in the percentage of the Europeans surveyed who say they have paid to access digital content, the use of illegal sources continues and increases, albeit at a lower level and rate than the use of legal offers. As the number of legal offers has increased over time, and the amount of consumption has also risen, some of the Europeans surveyed appear to display behaviour suggesting that they will use any available means to access their desired content. This finding is supported by the large increase in the use of legal services not necessarily discouraging the use of illegal sources, in addition to the fact that 3 out of 10 respondents find it acceptable to use illegal sources if there is no legal alternative immediately available.

This is further illustrated by the fact that approximately one third (32 %) of the Europeans surveyed accessed online copyright content, legally or illegally, with 22 % using only lawful services, 5 % using only illegal sources and 5 % using a mix of paid lawful and illegal sources, suggesting the respondents are willing to switch between legal and illegal sources in order to gain access to content.

Detailed results: Europeans use of lawful and illegal sources on the internet.

Q4b — *During the past 12 months, have you done any of the following?*

As the use of lawful services increases, so has awareness of the legality of online content; however, there appears to be increased ambiguity regarding what constitutes a legal or illegal offer. 24 % of the Europeans surveyed have questioned whether a source was legal or not, a 5-point increase compared with the 2013 study . However, the increase in questioning behaviour has not yet translated into action, as 14 % of the Europeans surveyed say they have 'researched to check if a source' was legal or not, a 2-point increase compared with the 2013 study .

While respondents among the youngest generation still question the legality of a source at a higher rate than other age groups, the rate of wondering is slightly decreasing among those aged 15 to 24, while significantly increasing among all other age groups. 41 % of respondents aged 15 to 24 (– 1 point) report having wondered whether a source was legal or not, whereas 31 % of those aged 25 to 39 (+ 6 points) and 15 % of respondents aged 55 or over (+ 6 points) have also questioned the lawfulness of an online source. Respondents aged 40 to 54 show the greatest evolution, as 23 % of people in this age group say they have wondered whether a source was legal or not — a 7-point increase compared with 2013. As men state a higher level of digital content consumption (both legally and illegally), they naturally continue to be more likely to question whether a site is legal or not, as 26 % of men interviewed disclose this behaviour (+ 4 points) and 22 % of women (+ 5 points) say the same.

Just as the youngest generation is the most likely to have questioned the legality of an online source, respondents aged 15 to 24 are also the most likely to have researched to check whether a site was legal or not. 27 % of those aged 15 to 24 (+ 1 point) say they have researched the legality of a source, compared with only 8 % of respondents aged 55 or over (+ 2 points). However, the respondents aged 25 to 39 show the most significant evolution, as 20 % of this age group say they have researched a website — a four-point increase from 2013. Furthermore, manual workers are now the most likely to have researched to determine whether a website was legal or not (17 %, + 5 points), whereas in 2013, the respondents classified as 'employee' researched the most (16 %, + 2 points).

Detailed results: Online behaviour according to country.

Q4b — *During the past 12 months, have you done any of the following?*

	Over the last 12 months which of the following situations have you experienced personally? — I wondered if a site where I could download music or videos was legal or not	Over the last 12 months which of the following situations have you experienced personally? —- I researched to check if a site where I could download music or videos was legal or not
PL	33 % (+ 6)	24 % (+ 4)
BG	31 % (+ 11)	16 % (+ 4)
RO	31 % (+ 10)	19 % (+ 5)
LU	30 % (+ 9)	12 % (– 6)
FI	29 % (+ 10)	17 % (+ 6)
LT	28 % (+ 15)	21 % (+ 12)
FR	28 % (+ 11)	12 % (+ 3)
CY	27 % (+ 7)	16 % (+ 3)
SK	27 % (+ 10)	20 % (+ 7)
EL	26 % (+ 3)	13 % (+ 1)
IE	25 % (– 1)	15 % (– 3)
IT	25 % (+ 6)	14 % (+ 5)
LV	24 % (– 4)	13 % (– 5)
CZ	24 % (– 3)	10 % (– 4)
EU-28	24 % (+ 5)	14 % (+ 2)
ES	24 % (+ 4)	17 % (+ 5)
UK	24 % (+ 3)	15 % (– 2)
HR	24 % (+ 13)	14 % (+ 6)
BE	23 % (+ 5)	11 % (– 1)
SI	22 % (+ 9)	10 % (+ 2)
DK	21 % (+ 7)	15 % (+ 5)
NL	21 % (+ 5)	11 % (+ 2)
AT	21 % (+ 4)	11 % (– 1)
HU	18 % (+ 6)	19 % (+ 12)
DE	17 % (=)	11 % (– 1)
EE	17 % (+ 8)	11 % (+ 3)
PT	16 % (– 3)	13 % (– 2)
SE	16 % (+ 3)	11 % (+ 1)
MT	14 % (+ 3)	10 % (=)

Detailed results: Online behaviour according to age.

Q4b — During the past 12 months, have you done any of the following?

	AGE			
	15-24	25-39	40-54	55 +
Wondered if a source where you could download music or videos was legal or not	41 % (– 1)	31 % (+ 6)	23 % (+ 7)	15 % (+ 6)
Researched to check if a source where you could download music or videos was legal or not	27 % (+ 1)	20 % (+ 4)	13 % (+ 2)	8 % (+ 2)

Of the respondents who admit to using illegal sources to access online copyright content, price prevails as the apparent driver for the behaviour. 71 % of Europeans list the 'availability of affordable content from legal sources' as the main reason that would make them stop this behaviour, followed by the 'risk of punishment' (43 %). While very few copyright infringers are insensitive to any arguments for stopping the behaviour (only 5 % say 'nothing would make me stop'), macro-level arguments, such as harm to creation (29 %) and harm to the economy (28 %), lag far behind the fear of being punished and the price of the legal offer . The availability of affordable content from legal offers as the top reason for stopping the behaviour is most strongly cited by respondents in the following categories: aged 25 to 39 (74 %), employed (76 %), in large urbanised cities (75 %), who are highly educated (72 %), which is in line with the profile of a typical online user.

Detailed results: Top reasons that would make respondents stop using illegal sources by country.

Q9 — *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?*

	Availability of affordable content from legal sources	Risk of punishment
LU	89 %	36 %
CZ	88 %	55 %
FI	80 %	35 %
AT	79 %	56 %
ES	77 %	52 %
UK	76 %	41 %
BE	73 %	57 %
PT	73 %	47 %
SE	73 %	33 %
PL	72 %	30 %
EU-28	71 %	43 %
FR	71 %	45 %
IE	70 %	43 %
NL	69 %	59 %
DK	67 %	47 %
DE	67 %	49 %
EE	67 %	27 %
IT	67 %	24 %
LV	66 %	42 %
EL	64 %	36 %
LT	63 %	26 %
HU	58 %	26 %
SK	57 %	20 %
BG	55 %	32 %
HR	51 %	37 %
CY	51 %	29 %
SI	50 %	24 %
RO	48 %	49 %
MT	40 %	16 %

2.3.3.2 High level of awareness of legal offers, particularly among younger generations

Similar to the 2013 study, awareness of legal offers depends largely on the type of content: remaining high for music, although with a 4-point decrease (61 %) and films (57 %, + 1 point) and increasing for TV series (53 %, + 2 points), books (52 %, + 2 points), and live sports events (47 %, + 3 points). A little more than half (54 %, – 1 point) are aware of legal sources for newspapers, and less than half know about legal sources for photographs (41 %, – 5 points) and videogames (41 %, – 5 points) .

The level of awareness of legal offers for each type of content continues to vary from country to country, but legal offers overall are more well known in the Netherlands and Nordic countries (Finland and Denmark). Conversely, legal offers are least known in Cyprus, Croatia, Greece, Portugal, and eastern Europe (Estonia and Bulgaria).

Detailed results: Awareness of legal offers for different content types.

Q6 — *Among the type of content listed below, for which one(s) are you aware of lawful services accessible to your country to access, download or stream them on the internet?*

	Music	Films	TV series	Live sports events	Books	Newspapers	Pho-to-graphs	Video-games	None	DK/NA
NL	85 % (+ 6)	79 % (+ 12)	79 % (+ 18)	69 % (+ 14)	77 % (+ 14)	80 % (+ 6)	63 % (– 2)	58 % (+ 4)	1 % (– 2)	6 % (– 3)
DK	73 % (– 8)	67 % (– 2)	68 % (+ 2)	58 % (+ 4)	68 % (+ 2)	75 % (– 2)	49 % (– 7)	52 % (– 6)	1 % (– 1)	12 % (+ 6)
UK	73 % (– 13)	67 % (– 13)	69 % (– 9)	53 % (– 9)	65 % (– 15)	62 % (– 13)	45 % (– 22)	44 % (– 23)	14 % (+ 13)	5 % (=)
FI	71 % (– 4)	64 % (– 1)	71 % (– 1)	65 % (=)	57 % (+ 5)	72 % (– 4)	56 % (– 5)	53 % (– 6)	1 % (– 2)	11 % (+ 2)
IE	70 % (– 19)	66 % (– 16)	68 % (– 8)	57 % (– 9)	58 % (– 19)	62 % (– 15)	43 % (– 25)	40 % (– 27)	8 % (+ 7)	7 % (+ 2)
LV	70 % (– 1)	67 % (+ 6)	63 % (+ 11)	64 % (+ 7)	59 % (+ 9)	62 % (+ 7)	54 % (+ 2)	51 % (– 1)	1 % (=)	15 % (+ 2)
BE	69 % (– 6)	66 % (+ 3)	62 % (+ 10)	54 % (+ 4)	59 % (+ 10)	65 % (+ 3)	51 % (– 5)	53 % (– 4)	6 % (=)	9 % (– 1)
SE	69 % (– 6)	65 % (– 3)	67 % (– 1)	50 % (– 11)	57 % (– 3)	57 % (– 12)	30 % (– 25)	33 % (– 17)	8 % (+ 5)	14 % (+ 2)
FR	67 % (=)	62 % (+ 2)	52 % (+ 7)	41 % (+ 8)	49 % (+ 6)	50 % (+ 2)	32 % (=)	42 % (=)	7 % (– 3)	9 % (– 6)
LT	67 % (+ 7)	68 % (+ 10)	62 % (+ 20)	61 % (+ 16)	64 % (+ 19)	64 % (+ 16)	55 % (+ 15)	57 % (+ 14)	1 % (=)	11 % (– 8)

	Music	Films	TV series	Live sports events	Books	Newspapers	Pho-to-graphs	Video-games	None	DK/NA
ES	66 % (– 5)	64 % (+ 3)	59 % (– 4)	57 % (+ 4)	63 % (=)	57 % (– 16)	40 % (– 18)	46 % (– 3)	6 % (+ 2)	12 % (+ 4)
CZ	65 % (+ 4)	59 % (+ 2)	59 % (+ 5)	52 % (+ 4)	55 % (+ 12)	58 % (+ 7)	51 % (+ 4)	49 % (+ 1)	1 % (– 1)	22 % (=)
PL	63 % (+ 16)	59 % (+ 20)	54 % (+ 11)	57 % (+ 12)	53 % (+ 18)	52 % (+ 13)	44 % (+ 9)	44 % (+ 15)	3 % (– 2)	11 % (– 9)
EU-28	61 % (– 4)	57 % (+ 1)	53 % (+ 2)	47 % (+ 3)	52 % (+ 2)	54 % (– 1)	41 % (– 5)	41 % (– 5)	5 % (+ 1)	15 % (– 2)
LU	59 % (– 10)	49 % (– 5)	50 % (+ 5)	40 % (– 3)	53 % (+ 1)	62 % (=)	37 % (– 9)	37 % (– 6)	9 % (+ 2)	9 % (– 1)
AT	58 % (– 5)	50 % (+ 3)	48 % (=)	34 % (– 12)	54 % (+ 3)	57 % (– 5)	36 % (– 14)	27 % (– 18)	18 % (+ 14)	4 % (– 13)
HU	58 % (=)	55 % (+ 4)	52 % (+ 7)	51 % (+ 11)	52 % (+ 9)	56 % (+ 11)	49 % (+ 6)	48 % (+ 6)	3 % (– 3)	26 % (+ 5)
DE	57 % (– 3)	51 % (+ 3)	57 % (+ 7)	50 % (+ 11)	51 % (+ 4)	61 % (+ 6)	49 % (+ 2)	42 % (– 2)	3 % (=)	17 % (– 6)
PT	56 % (– 12)	47 % (– 9)	46 % (– 1)	39 % (– 3)	49 % (– 5)	56 % (– 5)	41 % (– 15)	42 % (– 6)	6 % (+ 1)	23 % (+ 9)
SI	54 % (=)	50 % (+ 4)	47 % (+ 12)	50 % (+ 5)	48 % (+ 8)	52 % (+ 5)	45 % (+ 8)	43 % (+ 4)	2 % (– 6)	23 % (+ 6)
EE	50 % (– 10)	46 % (– 5)	47 % (=)	42 % (+ 1)	47 % (+ 1)	49 % (– 3)	36 % (– 6)	34 % (– 6)	1 % (– 1)	31 % (+ 1)
IT	49 % (– 6)	45 % (+ 4)	34 % (+ 3)	33 % (+ 4)	39 % (+ 2)	40 % (+ 1)	31 % (– 1)	32 % (– 2)	2 % (– 3)	27 % (– 2)
MT	48 % (– 5)	49 % (+ 6)	45 % (+ 11)	43 % (+ 2)	44 % (– 2)	50 % (– 5)	40 % (– 2)	39 % (+ 4)	5 % (– 3)	23 % (+ 5)
RO	46 % (– 7)	43 % (– 2)	33 % (+ 3)	37 % (+ 5)	36 % (+ 4)	36 % (+ 4)	28 % (– 1)	32 % (– 2)	2 % (– 2)	25 % (– 1)
SK	43 % (– 30)	41 % (– 25)	31 % (– 25)	31 % (– 24)	33 % (– 16)	35 % (– 23)	26 % (– 28)	27 % (– 24)	3 % (– 1)	24 % (+ 14)
BG	43 % (– 15)	44 % (– 9)	37 % (=)	42 % (+ 6)	40 % (+ 5)	35 % (+ 2)	25 % (– 7)	33 % (– 6)	3 % (+ 1)	26 % (+ 6)
EL	43 % (– 14)	38 % (– 11)	34 % (– 11)	28 % (– 11)	35 % (– 9)	36 % (– 17)	25 % (– 20)	29 % (– 16)	7 % (+ 1)	25 % (+ 5)
HR	40 % (– 5)	36 % (=)	28 % (– 2)	30 % (– 5)	28 % (– 4)	31 % (– 10)	24 % (– 6)	28 % (– 6)	4 % (– 2)	33 % (+ 6)
CY	36 % (– 22)	36 % (– 15)	36 % (– 14)	37 % (– 11)	26 % (– 18)	46 % (– 15)	23 % (– 22)	26 % (– 22)	6 % (+ 4)	34 % (+ 13)

Just as was reported in the 2013 study, awareness of legal offers is higher among younger people (respondents aged 15 to 24 and those aged 25 to 39) across content types. Awareness is at least 10 points above the EU average across all content types, except for books and newspapers.

Detailed results: Awareness of lawful services according to age.

Q6 — *Among the type of content listed below, for which one(s) are you aware of lawful services accessible to your country to access, download or stream them on the internet?*

	EU-28	Aged15 to 24	Aged 25 to 39
Music	61 % (– 4)	76 % (– 7)	76 % (– 1)
Films	57 % (+ 1)	69 % (+ 2)	70 % (– 3)
TV series	53 % (+ 2)	67 % (+ 2)	68 % (+ 5)
Live sports events	47 % (+ 3)	57 % (+ 2)	58 % (+ 6)
Books	52 % (+ 2)	61 % (+ 1)	63 % (+ 2)
Newspapers	54 % (– 1)	60 % (– 3)	64 % (– 1)
Photographs	41 % (– 5)	53 % (– 9)	50 % (– 5)
Videogames	41 % (– 5)	56 % (+ 1)	50 % (– 5)
None	5 % (+ 1)	3 % (+ 1)	3 % (=)
DK/NA	15 % (– 2)	3 % (+ 1)	6 % (– 1)

2.3.3.3 A clearer stance on quality and diversity of content offered by lawful services

Questions regarding the quality and diversity of content were included in the 2013 study; however, comparisons of results between the 2013 and 2016 results must be made with caution, as the wording of the questions have changed. Strict comparison is not possible, nor recommended.

With that in mind, there appears to be a clearer stance regarding the quality of content offered by lawful services. 69 % of the Europeans surveyed believe that 'the quality of content offered by lawful services is better than what can be found through illegal solutions ', whereas in 2013, 55 % of the Europeans surveyed agreed that the quality of the content offered by lawful sources was 'at least as good as' the content found using illegal solutions.

This is even truer among the younger generations: three-quarters of respondents aged 15 to 24 (76 %) and those aged 25 to 39 (73 %) feel that the quality of content available through legal sources is superior to content found through illegal solutions. Additionally, respondents with more education are more likely to share this opinion compared with the least-educated respondents. 69 % of the Europeans surveyed with the highest level of education say that legal services offer higher quality content, compared with 66 % of respondents who finished their education before age 15. Furthermore, men (70 %), urbanised respondents (70 %), and those classified as 'employees' (71 %) are also more likely to share this view compared with their counterparts.

Room for improvement remains regarding the perception of the diversity of content offered by lawful services, as 54 % of Europeans believe that lawful services offer more diverse content than what can be found through illegal solutions, and 27 % disagree[40]. In 2013, 50 % of the Europeans surveyed felt that 'the diversity of content offered by lawful services is at least as good as what can be found through illegal offers', and 30 % of the Europeans surveyed disagreed with this statement.

40 - Note: New response for Q7. Q7.2: For each of the following statements regarding lawful services offering content protected by copyright and related rights (music, films, etc.) on the internet please indicate whether you totally agree, tend to agree, tend to disagree or totally disagree.

Six out of ten of respondents aged 15 to 24 believe that lawful services offer more diverse content than illegal sources and 37 % feel the opposite is true. A little more than half (51 %) of those aged 25 to 39 say lawful services provide more diverse content, while 39 % disagree. Interestingly, the least-educated respondents (60 %), those living in less urban areas (rural and small/medium-sized towns), and those either employed as manual workers (57 %) or those who are not currently employed (57 %) are the most likely to share the opinion that lawful services offer more diverse content than illegal sources.

Detailed results: Q7— For each of the following statements regarding lawful services offering content protected by copyright and related rights (such as music, films etc.) on the internet please indicate whether you totally agree, tend to agree, tend to disagree or totally disagree.

Q7.1 — *The quality of content offered by lawful services is better than what can be found through illegal solutions*

Age group	Total 'Agree'	Total 'Disagree'	DK/NA
15-24	76 %	21 %	3 %
25-39	73 %	19 %	8 %
40-54	68 %	15 %	17 %
55 +	64 %	14 %	22 %

Detailed results: Q7— For each of the following statements regarding lawful services offering content protected by copyright and related rights (such as music, films etc.) on the internet please indicate whether you totally agree, tend to agree, tend to disagree or totally disagree.

Q7.2 — The diversity of content offered by lawful services is better than what can be found through illegal offers.

Age group	Total 'Agree'	Total 'Disagree'	DK/NA
15-24	60 %	37 %	3 %
25-39	51 %	39 %	10 %
40-54	54 %	25 %	21 %
55 +	55 %	19 %	26 %

In conclusion, regarding online content, an increase in the number of legal offers available since 2013 translates into use, but has not resulted in a decrease in illegal behaviour, as consumption needs appear to prevail, with respondents being willing to shift towards illegal sources if legal offers do not meet their needs. A clearer stance is taken regarding the quality and diversity of online content offered by legal sources, but these points are challenged, particularly by younger people.

The superior quality of legal offers is acknowledged by the majority (69 %) of the Europeans surveyed and it is an opinion that is shared between infringers and non-infringers. However, an improvement in legal offers in terms of diversity seems essential, as just over half (54 %) of the Europeans interviewed feel that the diversity of content offered by lawful services is better than what is available through illegal sources, with infringers questioning the legal offer most (only 45 % of infringers think that legal offers have more diverse content than illegal solutions).

2.3.4 Focus on youth

2.3.4.1 Comparison with the 2016 Intellectual Property and Youth Scoreboard

In response to the results regarding European youth uncovered in the 2013 European Citizens and Intellectual Property: Perception, Awareness, and Behaviour study, the EUIPO conducted an additional study, the 2016 Intellectual Property and Youth Scoreboard to gain a better understanding of youth behaviours and perceptions. When making comparisons between this current study and the 2016 Intellectual Property and Youth Scoreboard, it is imperative to consider the difference in methodologies.

This study was conducted via telephone, while the IP Youth Scoreboard was conducted via an online survey. When considering two surveys with two different data-collection methods, strict comparison of the results is not recommended. Readers have to be reminded that both methodologies were the best choices according to the respective targets of the surveys: with a target group aged 15 to 24, the online methodology was the best way for the IP Youth Scoreboard to reach a population that has become hard to investigate using the telephone, especially with the increasing rarity of landlines. For the European Citizens and IP survey, the necessity to have a representative sample of all citizens regardless of age or location has led to the use of telephone interviews, which remains the only option to reach Europeans who have no access to internet.

Apart from the data-collection methods, the questionnaire design also differs between the two studies considered. In the IP Youth Scoreboard, respondents were first asked about the types of content they downloaded or streamed, and then if they had accessed them through illegal websites. In the European Citizens and IP survey, respondents were directly asked using a list if they had engaged in digital content consumption behaviour, such as downloading illegally, paying for lawful services or having wondered if an online source of IP protected content was legal or not. In addition, the items of the question regarding the top reasons that would make respondents stop infringement behaviour were reworked compared with the IP Youth Scoreboard.

For these reasons, comparisons between the two surveys have to be taken very cautiously.

With this in mind, similarities in youth perception and behaviour are identified between this report on European Citizens and Intellectual Property: Perception, Awareness, and Behaviour conducted in 2016, and the 2016 IP Youth Scoreboard, most notably related to illegal behaviour, the reasons young people engage in illegal behaviour and the top reasons that would make them stop the behaviour. However, while similarities exist, the youth response rate tends to differ between studies.

Regarding the intentional use of illegal sources to access online copyright content, the IP Youth Scoreboard and this study reveal very similar results: 25 % of respondents aged 15 to 24 questioned in the IP Youth Scoreboard admit intentionally using illegal sources to access digital content in the last 12 months — 27 % admitted the same in this study.

Additionally, when the young people who admitted to intentionally accessing online content using illegal sources in each study were asked what their primary reasons would be for stopping this behaviour, both studies reveal that affordability and the risk of punishment are the top two motivators; however, respondents aged 15 to 24 in this study report these two reasons at significantly higher levels.

- 58 % of young people interviewed in the IP Youth Scoreboard say that the availability of affordable content via legal sources would be the primary reason for stopping using illegal sources — 70 % of respondents aged 15 to 24 in this study listed the same as their top reason.

- 36 % of those aged 15 to 24 in the IP Youth Scoreboard listed the risk of punishment as the second reason — 48 % of young people in this study listed risk of punishment second.

As regards purchasing counterfeit goods, there are once again observable similarities: 12 % of respondents aged 15 to 24 interviewed in the IP Youth Scoreboard admit they have intentionally bought a counterfeit product online in the last 12 months — 15 % of young people admitted intentionally purchasing a counterfeit product (in general, not only online purchases) in this study.

The IP Youth Scoreboard reveals that young people list price as the main driver for purchasing counterfeit goods online, with 58 % of young people listing this as the main driver for their behaviour. A possible connection can be considered with this study, as acceptability of counterfeiting based on price is relatively high: 41 % of respondents aged 15 to 24 believe it is acceptable to purchase counterfeit products when the price of the original/authentic product is too high.

Price prevails as the primary reason prompting those aged 15 to 24 in both studies to stop buying counterfeit goods, ahead of a bad personal experience and the risk of punishment. However, like the intentional use of illegal sources to consume content online, youth in this study report these reasons at significantly higher levels than in the IP Youth Scoreboard. Additionally, the gap between the top two responses to stop engaging in counterfeiting behaviours is smaller in the IP Youth Scoreboard.

In the IP Youth Scoreboard, 45 % of respondents aged 15 to 24 say the primary reason they would stop purchasing counterfeits is the availability of affordable original products, followed by a personal bad experience (41 %) and the risk of punishment (27 %). In this study, 72 % of young people list the availability of affordable original products first, and then personal bad experience (51 %), followed by the risk of punishment (44 %).

2.3.4.2 Comparison with the European average

The 2013 study uncovered a particularity of Generation Y (respondents aged 15 to 24) concerning the challenges of intellectual property and its violations. This study has identified a similar trend, as young people continue to hold a principled opinion on counterfeiting and illegal digital content consumption, as well as uncertainties regarding negative macro-economic consequences that are similar to other age groups, but decreasingly so when compared with the 2013 study. This study also identifies a difference between the younger and older generations, as young people continue to be able to find advantages to counterfeiting and illegal digital content consumption, as long as the behaviour yields personal benefits. Like the European average, those aged 15 to 24 decreasingly identify counterfeiting as a way to protest or preserve one's purchasing power, and instead identify other factors, such as price and availability of desired goods, for engaging in illegal behaviour.

In comparison with the 2013 study, this study reveals a clear increase in acceptance of and engagement in purchasing counterfeit products; however, online digital behaviour remains largely similar, with little change between the 2013 and 2016 study.
In detail:

- 41 % of respondents aged 15 to 24 believe it is acceptable to purchase counterfeit products when the price for the original and authentic product is too high — 14 points above the European average, and a 7-point increase compared with 2013.

- 39 % of those aged 15 to 24 believe it is acceptable to buy counterfeit products when the original product is not or not yet available where you live — 15 points above the European average, and an 8-point increase compared with 2013.

- 48 % feel that consuming counterfeit products is a smart purchase that enables you to have the items that you want while preserving your purchasing power — 18 points above the European average, but a 4-point decrease compared with 2013.

- 45 % consider that consuming counterfeit products is an act of protest and a way to resist the market-driven economy and the large premium brands — 11 points above the European average, but a 3-point decrease compared with 2013.

- 43 % feel that it is acceptable to obtain content illegally from the internet when there is no immediately available legal alternative — 12 points higher, with no significant change compared with 2013 (42 %).

- 27 % of respondents aged 15 to 24 admit to having accessed or downloaded or streamed content from illegal online sources intentionally in the last 12 months — 17 points above the European average, with no significant change compared with 2013 (26 %).

- 37 % feel that illegal sources offer more diverse content than lawful services — 10 points above the European average (Note: No comparison can be made with the 2013 study, due to a change in question wording).

In conclusion, the younger generation continues to challenge and question IP, increasingly so in terms of buying counterfeit goods and accessing content from illegal sources.

2.3.5 Conclusion and future perspectives

In 2016, the Europeans interviewed increasingly regard intellectual property as a value and a set of principles that protect artistic creation and innovation. They view IP as an essential regulatory principle, believing that a lack of IP protection would impact economic stability.

However, and consistently with the literature review findings, as well as the 2013 results, intellectual property still appears to be a confusing and ambiguous topic for the Europeans surveyed. Even if the understanding of intellectual property increases across Europeans as a whole, strong IP understanding erodes in 2016. Moreover, younger Europeans disclose decreasing understanding and have more critical views on IP. Additionally, the Europeans interviewed continue to view the 'elites' as the main beneficiaries of IP, and citizens like themselves are recognised as beneficiaries to a much lesser extent.

The disconnection between support for IP principles overall and actual infringement behaviours related to IP has grown stronger between 2013 and 2016, with two trends that can be observed. On the one hand there has been an increase in the purchase of counterfeit products, especially among the younger generation, which goes hand in hand with a growing acceptability of this behaviour due to price and lack of availability, as well as a decrease in its perceived harm. Further analysis could notably be carried out on the detailed perceptions of IP in relation to innovation, as half of the Europeans surveyed declared that IP may curb innovation and a growing proportion believe that counterfeiting does not negatively impact innovation.

However, regarding online content, the growth of legal offers since 2013 translates into its use, as a significant increase is noted in the Europeans surveyed that report having paid to access, download or stream copyright content from lawful services. This growth, nevertheless, has not yet resulted in a decrease in illegal behaviour. Results confirm that Europeans do prefer legal sources, but a lack of access to desired content drives them to using illegal sources. The results also show an increase in uncertainty, as Europeans continue to reveal confusion regarding what constitutes a legal or an illegal source. This area has potential for further analysis.

As regards digital content, the ambiguity of IP is even more prevalent, thus not only infringement behaviour is at stake, but also the perception of IP as an ecosystem. Half of the Europeans surveyed, with an over-representation of the youngest, believe that IP is not adapted to the internet. This seems to be a sensitive topic that should be investigated more deeply in further surveys.

Moreover, the European citizens surveyed take a more positive stance regarding the quality of content provided by legal offers, but continue to challenge the diversity of its contents. Additional assessment linking availability and diversity with a reduction of piracy would be relevant in relation to legal offers.

3. APPENDIX A: ADDITIONAL TABLES

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

Table 1: Percentage of respondents saying 'yes' to statements regarding counterfeiting and digital content consumption.

	During the past 12 months have you done any of the following? - Bought counterfeit products intentionally	During the past 12 months have you done any of the following? - Accessed or downloaded or streamed content from illegal online sources intentionally	During the past 12 months have you done any of the following? - Paid to access, download or stream copyright protected content from a lawful service on the internet (for instance music, video, film or TV series)	Over the last 12 months which of the following situations have you experienced personally? - I wondered if a site where I could download music or videos was legal or not	Over the last 12 months which of the following situations have you experienced personally? - I researched to check if a site where I could download music or videos was legal or not
CY	18 % (+ 9)	14 % (+ 3)	20 % (+ 8)	27 % (+ 6)	16 % (+ 3)
LT	17 % (+ 8)	14 % (– 2)	26 % (+ 14)	28 % (+ 15)	21 % (+ 12)
SI	17 % (+ 12)	20 % (+ 3)	18 % (+ 4)	22 % (+ 9)	10 % (+ 2)
BG	16 % (+ 8)	8 % (– 6)	18 % (+ 6)	31 % (+ 11)	16 % (+ 4)
MT	13 % (+ 9)	9 % (– 2)	13 % (=)	14 % (+ 2)	10 % (=)
RO	13 % (+ 6)	5 % (– 3)	17 % (+ 7)	31 % (+ 10)	19 % (+ 5)
EL	12 % (+ 4)	12 % (=)	12 % (+ 3)	26 % (+ 3)	13 % (+ 1)
ES	11 % (+ 3)	16 % (– 1)	24 % (+ 6)	24 % (+ 4)	17 % (+ 5)
PT	10 % (+ 5)	7 % (– 6)	14 % (+ 3)	16 % (– 3)	13 % (– 2)
SK	10 % (+ 8)	8 % (– 3)	20 % (+ 7)	27 % (+ 10)	20 % (+ 7)
DK	9 % (+ 6)	10 % (=)	47 % (+ 8)	21 % (+ 7)	15 % (+ 5)
HR	9 % (+ 4)	12 % (=)	14 % (+ 8)	24 % (+ 13)	14 % (+ 6)
LU	9 % (+ 4)	13 % (+ 3)	44 % (+ 15)	30 % (+ 9)	12 % (– 6)
PL	9 % (+ 6)	7 % (– 3)	27 % (=)	33 % (+ 6)	24 % (+ 4)
BE	8 % (+ 1)	16 % (+ 1)	25 % (+ 5)	23 % (+ 5)	11 % (– 1)
EE	8 % (+ 3)	11 % (– 5)	20 % (+ 9)	17 % (+ 8)	11 % (+ 3)
LV	8 % (– 1)	14 % (– 6)	18 % (– 2)	24 % (– 4)	13 % (– 5)
EU-28	7 % (+ 3)	10 % (+ 1)	27 % (+ 7)	24 % (+ 5)	14 % (+ 2)
IT	7 % (+ 4)	7 % (+ 2)	16 % (+ 6)	25 % (+ 6)	14 % (+ 5)
FR	6 % (+ 2)	15 % (+ 1)	26 % (+ 9)	28 % (+ 11)	12 % (+ 3)
HU	6 % (+ 4)	6 % (+ 1)	17 % (+ 7)	18 % (+ 6)	19 % (+ 12)

	During the past 12 months have you done any of the following? - Bought counterfeit products intentionally	During the past 12 months have you done any of the following? - Accessed or downloaded or streamed content from illegal online sources intentionally	During the past 12 months have you done any of the following? - Paid to access, download or stream copyright protected content from a lawful service on the internet (for instance music, video, film or TV series)	Over the last 12 months which of the following situations have you experienced personally? - I wondered if a site where I could download music or videos was legal or not	Over the last 12 months which of the following situations have you experienced personally? - I researched to check if a site where I could download music or videos was legal or not
IE	6 % (+ 2)	13 % (– 3)	34 % (=)	25 % (– 1)	15 % (– 3)
SE	6 % (+ 2)	13 % (– 1)	44 % (+ 9)	16 % (+ 3)	11 % (+ 1)
CZ	5 % (+ 1)	10 % (– 1)	22 % (+ 3)	24 % (– 3)	10 % (– 4)
NL	5 % (+ 3)	15 % (+ 1)	44 % (+ 16)	21 % (+ 5)	11 % (+ 2)
UK	5 % (+ 2)	8 % (+ 3)	42 % (+ 10)	24 % (+ 3)	15 % (– 2)
AT	4 % (+ 1)	9 % (+ 1)	31 % (+ 15)	21 % (+ 4)	11 % (– 1)
DE	4 % (+ 2)	7 % (+ 3)	29 % (+ 11)	17 % (=)	11 % (– 1)
FI	4 % (+ 2)	7 % (– 3)	38 % (10)	29 % (+ 10)	17 % (+ 6)

Table 2: Share of citizens (EU-28 average) agreeing that counterfeit purchases are an act of protest and are a way to preserve purchasing power.

	% Agree that 'buying counterfeit products in an act of protest and a way to resist to the market-driven economy and the large premium brands'	% Agree that 'buying counterfeit products allows making a smart purchase that enables you to have the items that you wanted while preserving your purchasing power'
CY	55 % (– 7)	43 % (– 5)
SI	54 % (– 4)	41 % (=)
MT	52 % (+ 2)	48 % (+ 2)
LT	51 % (– 4)	50 % (– 5)
SK	49 % (+ 1)	37 % (– 1)
EL	48 % (– 8)	39 % (– 11)
HU	47 % (=)	28 % (– 4)
HR	46 % (– 4)	29 % (– 2)
PT	45 % (– 4)	43 % (+ 1)
BG	43 % (=)	39 % (– 3)
LV	43 % (– 8)	39 % (– 9)

	% Agree that 'buying counterfeit products in an act of protest and a way to resist to the market-driven economy and the large premium brands'	% Agree that 'buying counterfeit products allows making a smart purchase that enables you to have the items that you wanted while preserving your purchasing power'
RO	40 % (– 1)	31 % (– 5)
EE	38 % (– 1)	28 % (=)
BE	37 % (– 3)	35 % (– 3)
DK	37 % (– 1)	41 % (– 5)
LU	37 % (– 4)	36 % (– 3)
NL	37 % (=)	43 % (– 4)
AT	36 % (– 3)	40 % (– 3)
FI	36 % (– 4)	29 % (– 1)
CZ	35 % (– 5)	32 % (– 1)
IE	35 % (=)	35 % (+ 2)
EU-28	34 % (– 4)	30 % (– 4)
IT	34 % (=)	14 % (– 2)
SE	34 % (– 4)	26 % (– 2)
UK	33 % (=)	29 % (– 2)
FR	32 % (– 3)	30 % (– 7)
PL	32 % (– 13)	41 % (– 5)
ES	31 % (– 8)	25 % (– 3)
DE	28 % (– 4)	32 % (– 6)

Table 3: Share of citizens (EU-28 average) who believe legal offers are superior in terms of quality and diversity of content

	The quality of content offered by lawful services is better than what can be found through illegal solutions.	The diversity of content offered by lawful services is better than what can be found through illegal offers.	Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms and do not access/download/stream illegally.
EL	80 %	72 %	81 % (=)
MT	80 %	77 %	80 % (+ 5)
ES	78 %	67 %	87 % (+ 1)
IE	78 %	65 %	84 % (– 3)
IT	78 %	70 %	83 % (+ 6)

	The quality of content offered by lawful services is better than what can be found through illegal solutions.	The diversity of content offered by lawful services is better than what can be found through illegal offers.	Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms and do not access/download/stream illegally.
LV	78 %	49 %	82 % (+ 2)
FI	77 %	56 %	92 % (+ 4)
LT	76 %	53 %	70 % (– 3)
PT	75 %	67 %	79 % (– 2)
RO	75 %	68 %	77 % (– 1)
BG	74 %	63 %	76 % (– 5)
UK	73 %	59 %	82 % (+ 1)
AT	71 %	54 %	86 % (+ 6)
BE	71 %	58 %	82 % (+ 5)
PL	70 %	46 %	87 % (+ 1)
EU-28	69 %	54 %	83 % (+ 3)
HU	67 %	58 %	72 % (– 15)
LU	67 %	57 %	89 % (+ 10)
CY	66 %	60 %	74 % (+ 2)
EE	64 %	49 %	76 % (+ 5)
FR	64 %	57 %	85 % (+ 9)
HR	62 %	51 %	77 % (+ 7)
SE	62 %	42 %	86 % (+ 2)
SK	61 %	47 %	71 % (=)
CZ	60 %	42 %	68 % (+ 3)
DE	59 %	32 %	82 % (+ 3)
NL	59 %	46 %	85 % (+ 4)
SI	55 %	40 %	68 % (– 2)
DK	51 %	39 %	87 % (+ 3)

4. APPENDIX B: QUANTITATIVE QUESTIONNAIRE

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

Q1 — *Personally, would you say that you have a very good, rather good, rather poor or very poor understanding of the meaning of the following term.*

(One answer per raw – random rotation)

	Very good	Rather good	Rather poor	Very poor	DK/NA
Intellectual property					

Q2 — *Intellectual property is a set of principles and rules that enable investors, performers, artists and authors to protect the rights they have over their creation and receive reward.*

In your opinion, **who benefits the most** from the protection of intellectual property?
(Only one answer — random rotation)

Consumers like yourself

Large companies

Small and medium companies

Famous performing artists (musicians, singers, actors)

Less well-known famous performing artists (musicians, singers, actors)

Inventors

Creators of artistic content like photographers, sculptors, painters

Politicians

None (DO NOT READ OUT)

DK/NA

Q3: *Please tell me if you totally agree, tend to agree, agree, tend to disagree or totally disagree with the following statements:*

(One answer per row – random rotation)

	Very good	Rather good	Rather poor	Very poor	DK/NA
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.					

	Very good	Rather good	Rather poor	Very poor	DK/NA
8. Buying counterfeit products supports child labour and illegal trafficking.					
9. Buying counterfeit products poses a threat to health					
10. Buying counterfeit products discourages companies from inventing new products and introducing them to the market.					
11. Buying counterfeit products allows making a smart purchase that enables you to have the items that you wanted while preserving your purchasing power.					
12. Buying counterfeit products is an act of protest and a way to resist to the market-driven economy and the large premium brands.					

Q4a — *During the past 12 months, which of the following have you done?*

(One answer per row – rotate statements)

Bought counterfeit products intentionally

Bought counterfeit products as a result of being misled

Wondered if a product you bought was genuine or counterfeit

Q4b — *During the past 12 months, which of the following have you done?*

(One answer per row – rotate statements)

____

Accessed/downloaded or streamed content from illegal online sources intentionally

____

Paid to access, download or stream copyright protected content from a lawful service on the internet (for instance music, video, film or TV series)

____

Uploaded copyright protected content on the internet (music, video, film or TV series) in order to share it with other internet users

____

Wondered if a source where you could download music or videos was legal or not

____

Researched to check if a source where you could download music or videos was legal or not

Q5 — *Please indicate whether you totally agree, tend to agree, tend to disagree or totally disagree with each of the following statements:*

(One answer per row – rotate statements)

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK/NA
1. Protecting IP 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 IP is important because it contributes to improving and guaranteeing the quality of products and services.					
3. If there was no longer any IP 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.					

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK/NA
5. Companies that create a lot of IP (that hold patents, trade marks, designs, copyrights, trade secrets) contribute significantly more than the others to the creation of jobs/growth.					
6. Strict protection of Intellectual Property may curb innovation.					
7. The IP principles are not adapted to the internet.					

Q6 — *Among the type of content listed below, for which one(s) are you aware of lawful services accessible in your country to access or download/stream them on the internet?*

(Multiple answers – Rotate rotation)

Music

Films

TV series

Live sports events

Books

Newspapers

Photographs

Video games

___

None

___

DK/NA

Q7 — *For each of the statements regarding lawful services offering content protected by copyright and related rights (such as music, films etc.) on the internet please indicate whether you strongly agree, somewhat agree, somewhat disagree, strongly disagree:*

(One answer per raw – random rotation)

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK/NA
1. The quality of content offered by lawful services is better than what can be found through illegal solutions.					
2. The diversity of content offered by lawful 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.					

Q8 — *You indicated that you have intentionally bought counterfeit product during the past 12 months.*

What would make you stop buying counterfeit products?

Please indicate all that apply.

(Multiple answers except item 7– Random rotation expect item 7)

___

Risk of punishment

____

Personal bad experience with a counterfeit product

____

Bad experience of others with a counterfeit product

____

Harm to my image: others would judge me because of having/wearing counterfeit items

____

Availability of affordable original products

____

A better understanding of the harm caused by my behaviour on jobs/on the EU economy

____

A better understanding of the harm caused by my behaviour to the producers of the original products

____

Nothing would make me stop

Q9: *You indicated that you used illegal sources (websites) intentionally for online content during the past 12 months.*

What would make you stop using illegal sources? Please indicate all that apply

(Multiple answers except item 7– Random rotation expect item 7)

Risk of punishment

____

Personal bad experience with illegal sources

____

Bad experience of others with illegal sources (e.g. malware)

____

Availability of affordable content from legal sources

____

A better understanding of the harm caused by my behaviour to the musicians/writers/artists/creators, etc.

____

A better understanding of the harm caused by my behaviour on jobs/on the EU economy

____

Nothing would make me stop

5. APPENDIX C: METHODOLOGICAL NOTE

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

Between 21 and 28 October 2016, Edelman Intelligence carried out the survey, EU Citizens and Intellectual Property, Perceptions and Behaviour. It covers the population of the respective nationalities of the European Union Member States, residents in each of the 28 Member States aged 15 or over. The survey covers the national population of citizens (in these countries) as well as the population of citizens of all the Member States that are residents in these countries and have a sufficient command of the national languages to answer the questionnaire. All interviews were carried out using the TNS e-Call centre (centralised CATI system). In every country respondents were called both on landlines and mobile telephones. The basic sample design applied in all Member States is multi-stage random (probability). From each household, the respondent was drawn at random following the 'last birthday rule'.

A comparison between the sample and the universe was carried out. The Universe description was derived from the national statistics office. The weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. Gender and age, region and working status were introduced in the iteration procedure.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentages. With samples of about 1 000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process
(at the 95% level of confidence)

various sample sizes are in rows *various observed results are in columns*

	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	
N=50	6,0	9,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	**1,4**	**1,9**	**2,2**	**2,5**	**2,7**	**2,8**	**3,0**	**3,0**	**3,1**	**3,1**	**N=1000**
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,5	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	

List of Abbreviations and Technological Note

ABBR	COUNTRIES	INSTITUTES	NO INTERVIEWS	FIELDWORK DATES		POPULATION 15 +
BE	Belgium	TNS Dimarso	1 002	24/10/2016	28/10/2016	9 693 779
BG	Bulgaria	TNS BBSS	1 002	24/10/2016	28/10/2016	6 537 535
CZ	Czech Republic	TNS Aisa s	1 000	24/10/2016	28/10/2016	9 238 431
DK	Denmark	TNS Gallup DK	1 003	24/10/2016	28/10/2016	4 838 729
DE	Germany	TNS Infratest	1 000	24/10/2016	28/10/2016	70 160 634
EE	Estonia	TNS Emor	1 000	24/10/2016	28/10/2016	1 160 064
EL	Greece	TNS ICAP	1 000	24/10/2016	28/10/2016	9 937 810
ES	Spain	TNS Spain	1 003	24/10/2016	28/10/2016	39 445 245
FR	France	TNS Sofres	1 000	24/10/2016	28/10/2016	54 097 255
HR	Croatia	HENDAL	1 006	24/10/2016	28/10/2016	3 796 476
IE	Ireland	Behaviour & Attitudes	1 000	24/10/2016	28/10/2016	3 592 162
IT	Italy	TNS Italia	1 000	24/10/2016	28/10/2016	52 334 536
CY	Republic of Cyprus	CYMAR	501	24/10/2016	28/10/2016	741 308
LV	Latvia	TNS Latvia	1 001	24/10/2016	28/10/2016	1 707 082
LT	Lithuania	TNS LT	1 000	24/10/2016	28/10/2016	2 513 384
LU	Luxembourg	TNS ILRes	500	24/10/2016	28/10/2016	457 127
HU	Hungary	TNS Hoffmann	1 007	24/10/2016	28/10/2016	8 781 161
MT	Malta	MISCO	509	24/10/2016	28/10/2016	364 171
NL	Netherlands	TNS NIPO	1 010	24/10/2016	28/10/2016	13 979 215
AT	Austria	Ipr Umfrageforschung	1 003	24/10/2016	28/10/2016	7 554 711
PL	Poland	TNS Polska	1 001	24/10/2016	28/10/2016	33 444 171
PT	Portugal	TNS Portugal	1 000	24/10/2016	28/10/2016	8 480 126
RO	Romania	TNS CSOP	1 000	24/10/2016	28/10/2016	16 852 701
SI	Slovenia	Mediana	1 005	24/10/2016	28/10/2016	1 760 032
SK	Slovakia	TNS Slovakia	1 000	24/10/2016	28/10/2016	4 586 024
FI	Finland	TNS Gallup Oy	1 002	24/10/2016	28/10/2016	4 747 810
SE	Sweden	TNS SIFO	1 000	24/10/2016	28/10/2016	7 998 763
UK	United Kingdom	TNS UK	1 000	24/10/2016	28/10/2016	51 174 531
TOTAL EU-28			**26 555**	**24/10/2016**	**28/10/2016**	**429 974 973**

6. APPENDIX D: LITERATURE REVIEW STUDIES

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

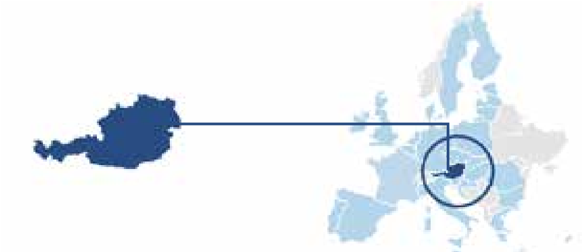
Name of the study	Country
1. Intellectual Property: Facts and Consumer Opinions on Counterfeit and Pirated Goods	USA
2. Student Attitudes Toward Intellectual Property	UK
3. Copy Culture in the US and Germany	USA and Germany
4. Consumer Research Reveals Consumer Attitudes towards Pirated Content	USA, UK, Australia, Indonesia, India and Singapore
5. Counterfeit Goods in the UK	UK
6. Online Copyright Infringement Tracker Wave 4	UK
7. Online Copyright Infringement Tracker Wave 5	UK
8. Online Copyright Infringement Tracker Wave 6	UK
9. Online Copyright Infringement Research	Australia
10. Digital Entertainment Survey	UK
11. Bad Company, You Can't Deny	USA
12. Online Piracy Behaviour and Attitudes in Singapore	Singapore
13. Australian Piracy Behaviours	Australia
14. Business Insider Streaming Sites Survey	
15. Pirate or Subscribe? An exploratory study on Italian consumers' music habits	Italy
16. The Effect of Piracy Website Blocking on Consumer Behaviour	UK
17. Third wave of the survey "Hadopi, cultural goods and Internet uses: practices and perceptions of French Internet users"	France
18. Fourth wave of the survey "Hadopi, cultural goods and Internet uses: practices and perceptions of French Internet users"	France
19. Fifth wave of the survey "Hadopi, cultural goods and Internet uses: practices and perceptions of French Internet users"	France
20. Dematerialized cultural goods consumption practices and perceptions of French digital natives	France
21. Barometer of French perceptions around dematerialized cultural goods legal offer	France
22. Second wave of the Barometer of French perceptions around dematerialized cultural goods legal offer	France

Name of the study	Country
23. Third wave of the Barometer of French perceptions around dematerialized cultural goods legal offer	France
24. Perception of court ruling on closing of web-sites by cultural content consumers from illegal online sources	France
25. File-sharing and Copyright Development in Hungary	Hungary
26. File-sharing Online Copyright Enforcement, Consumer Behaviour, and Market Structure	Germany
27. Music Consumer Insights	International
28. Copyright Law in Transition	Poland
29. Report on the functioning of the digital music market in Poland	Poland
1. Analysis of the impact of the phenomenon of piracy of video content on the economy in Poland	Poland
2. Experience of Hungarian trade companies with counterfeiting	Hungary
1. Survey on e-book reading habits	Hungary
2. Assessment of attitudes towards counterfeit products (2015 & 2016 waves)	Hungary
3. Evolution of citizens' attitudes towards coun-terfeit products (three waves: 2009-2013, 2009-2014, 2009-2015)	Hungary
4. Evolution of citizens' attitudes towards coun-terfeit products and IP law protected content stemming from illegal sources (between 2009-2016)	Hungary
5. Survey on habits and attitudes of Hungarian high school students towards IP law protect-ed digital content (2015)	Hungary

7. APPENDIX E: COUNTRY SCORECARDS

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

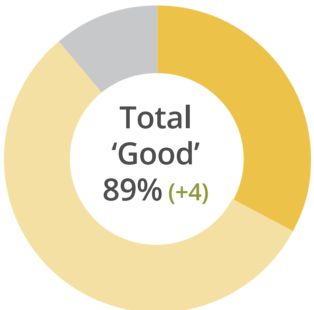
AUSTRIA



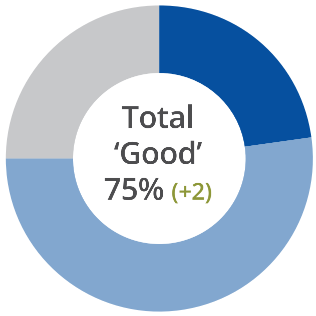
GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING

'Very good' 33% (-11)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Austria		EU	
Big companies	26%	(-3)	24%	(-1)
Famous performing artists	22%	(+5)	20%	(+3)
Inventors	11%	(-4)	13%	(-4)
Consumers like myself	4%	(+1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Austria		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	98%	(+2)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	93%	(+5)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	87%	(+5)	88%	(+2)

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Austria ■ EU ■

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Austria		EU	
If there was no longer any IP there would be economic chaos	64%	(+2)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	70%	(-1)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	47%		50%	
NEW 2016 IP principles are not adapted to the Internet	45%		48%	

ILLEGAL BEHAVIOURS

	Austria		EU	
Bought counterfeit products intentionally	4%	(+1)	7%	(+3)

Buying counterfeit products*

	Austria		EU	
ruins businesses and jobs	79%	(=)	78%	(-3)
supports child labour and illegal trafficking	74%	(-2)	68%	(-3)
poses a threat to health	63%	(=)	66%	(-1)
discourages companies from inventing new products	46%	(+3)	49%	(-4)

It is acceptable when*

	Austria		EU	
the price for the original product is too high	27%	(+3)	27%	(+3)
the original is not or not yet available where you live	29%	(+5)	24%	(+6)
the quality of the product does not matter	23%	(+2)	21%	(+4)

Austria EU

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Austria	EU
Availability of affordable original products	63%	63%
Personal bad experience with a counterfeit product	59%	41%
Risk of punishment	47%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	47%	28%

RESPONSIBLE BEHAVIOURS

	Austria	EU
Bought counterfeit products as a result of being misled	6% (+3)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	25%	35%

ILLEGAL BEHAVIOURS

	Austria	EU
Downloaded/streamed from illegal sources	9% (+1)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	86% (+7)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	71%	69%
NEW 2016 Diversity of legal offer is better than illegal	54%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	34% (-9)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	27% (+6)	31% (+9)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Austria EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES

Reason	Austria	EU
Availability of affordable content from legal sources	79%	71%
Risk of punishment	56%	43%
Bad experience of others with illegal sources	60%	37%
Personal bad experience with illegal sources	59%	36%

RESPONSIBLE BEHAVIOURS

Behaviour	Austria	EU
Paid to access content from legal sources	31% (+15)	27% (+7)
Wondered if a source where one could download music or video was legal or not	21% (+4)	24% (+5)
Researched to check if a source where one could download music or videos was legal or not	11% (-1)	14% (+2)

Austria EU

*Numbers reflect "Total 'Agree'"

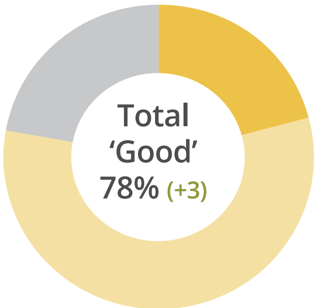
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

GENERAL PERCEPTIONS OF IP

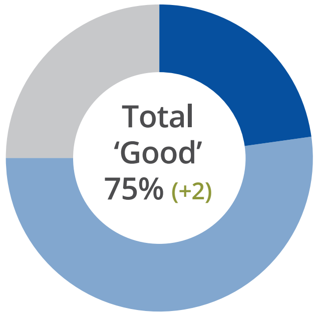
BELGIUM

IP UNDERSTANDING

'Very good' 21% (-10)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Belgium		EU	
Big companies	32%	(+1)	24%	(-1)
Famous performing artists	18%	(+5)	20%	(+3)
Inventors	11%	(-7)	13%	(-4)
Consumers like myself	3%	(=)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Belgium		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	98%	(+2)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	88%	(+5)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	88%	(=)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Belgium EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Belgium		EU	
If there was no longer any IP there would be economic chaos	69%	(+4)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	66%	(-6)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	55%		50%	
NEW 2016 IP principles are not adapted to the Internet	59%		48%	

ILLEGAL BEHAVIOURS

	Belgium		EU	
Bought counterfeit products intentionally	8%	(+1)	7%	(+3)

Buying counterfeit products*

	Belgium		EU	
ruins businesses and jobs	71%	(+4)	78%	(-3)
supports child labour and illegal trafficking	69%	(-1)	68%	(-3)
poses a threat to health	63%	(+2)	66%	(-1)
discourages companies from inventing new products	49%	(-1)	49%	(-4)

It is acceptable when*

	Belgium		EU	
the price for the original product is too high	37%	(+3)	27%	(+3)
the original is not or not yet available where you live	32%	(+5)	24%	(+6)
the quality of the product does not matter	32%	(=)	21%	(+4)

Belgium EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Belgium	EU
Availability of affordable original products	62%	63%
Personal bad experience with a counterfeit product	48%	41%
Risk of punishment	41%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	32%	28%

RESPONSIBLE BEHAVIOURS

	Belgium	EU
Bought counterfeit products as a result of being misled	6% (=)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	27%	35%

ILLEGAL BEHAVIOURS

	Belgium	EU
Downloaded/streamed from illegal sources	16% (+1)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	82% (+5)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	71%	69%
NEW 2016 Diversity of legal offer is better than illegal	58%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	44% (-5)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	40% (+12)	31% (+9)

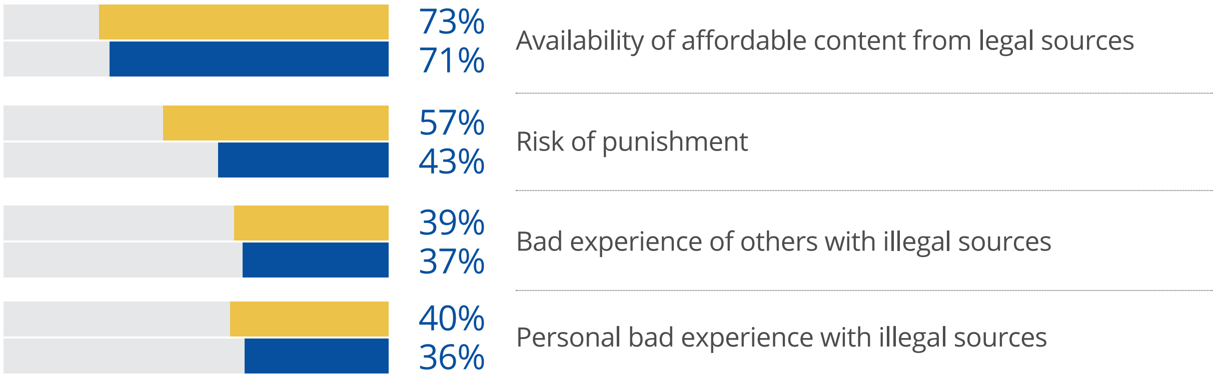
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

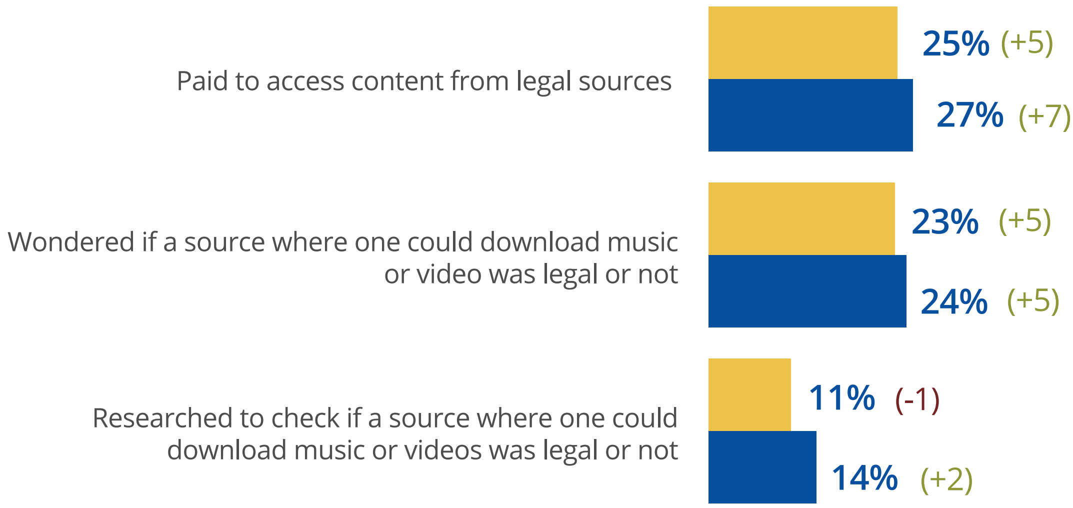
Belgium EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS

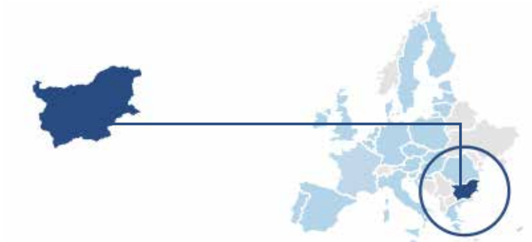


Belgium EU

*Numbers reflect "Total 'Agree'"

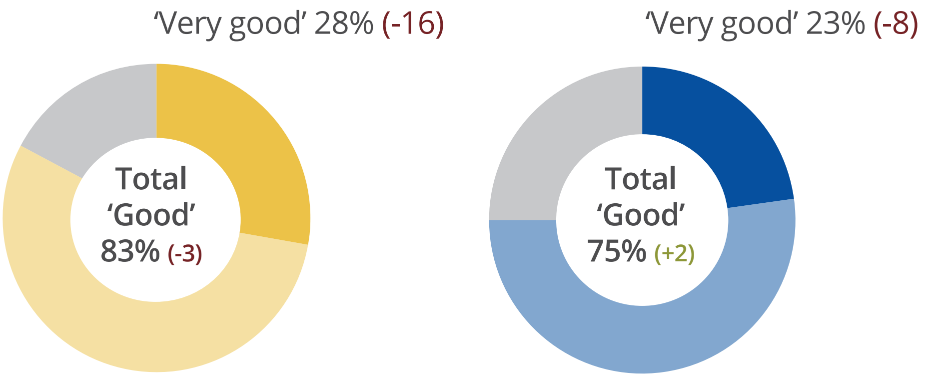
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BULGARIA



GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING



THOSE BENEFITING MOST FROM IP (TOP 4)

	Bulgaria		EU	
Big companies	8%	(-7)	24%	(-1)
Famous performing artists	10%	(+5)	20%	(+3)
Inventors	34%	(-1)	13%	(-4)
Consumers like myself	10%	(-1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Bulgaria		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	98%	(+1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	88%	(+2)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	91%	(-1)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Bulgaria EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

		Bulgaria		EU	
	If there was no longer any IP there would be economic chaos	70%	(-5)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	71%	(-7)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	52%		50%	
NEW 2016	IP principles are not adapted to the Internet	45%		48%	

ILLEGAL BEHAVIOURS

	Bulgaria	EU
Bought counterfeit products intentionally	16% (+8)	7% (+3)

		Bulgaria		EU	
Buying counterfeit products*	ruins businesses and jobs	71%	(=)	78%	(-3)
	supports child labour and illegal trafficking	61%	(+9)	68%	(-3)
	poses a threat to health	82%	(+5)	66%	(-1)
	discourages companies from inventing new products	58%	(-8)	49%	(-4)
It is acceptable when*	the price for the original product is too high	42%	(+6)	27%	(+3)
	the original is not or not yet available where you live	36%	(+3)	24%	(+6)
	the quality of the product does not matter	28%	(+4)	21%	(+4)

Bulgaria EU

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP REASONS TO STOP BUYING FAKES

Reason	Bulgaria	EU
Availability of affordable original products	65%	63%
Personal bad experience with a counterfeit product	35%	41%
Risk of punishment	22%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	24%	28%

RESPONSIBLE BEHAVIOURS

	Bulgaria	EU
Bought counterfeit products as a result of being misled	31% (+12)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	64%	35%

ILLEGAL BEHAVIOURS

	Bulgaria	EU
Downloaded/streamed from illegal sources	8% (-6)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	76% (-6)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	74%	69%
NEW 2016 Diversity of legal offer is better than illegal	63%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	42% (-15)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	46% (+12)	31% (+9)

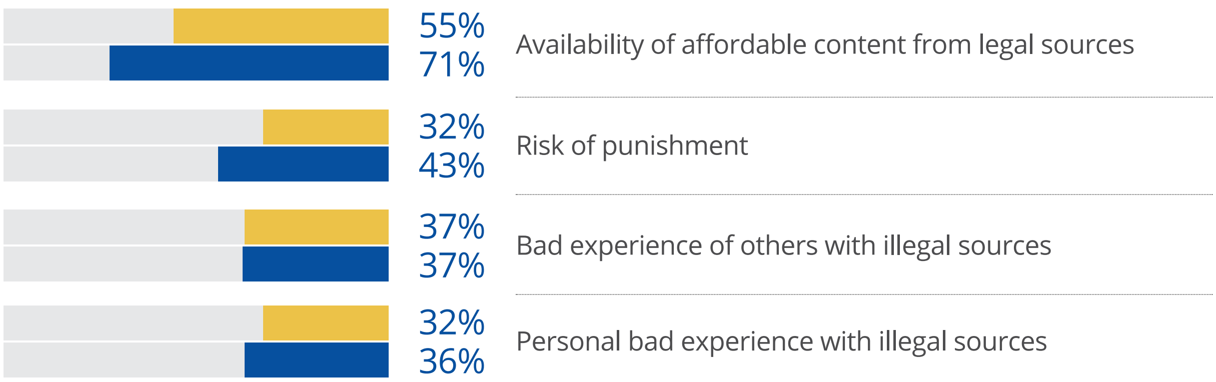
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

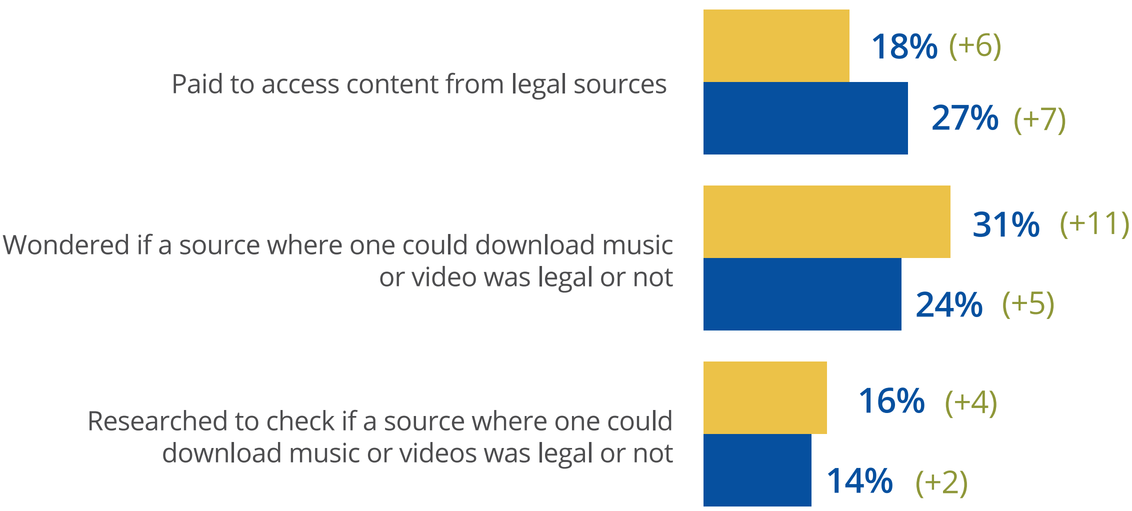
Bulgaria EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS

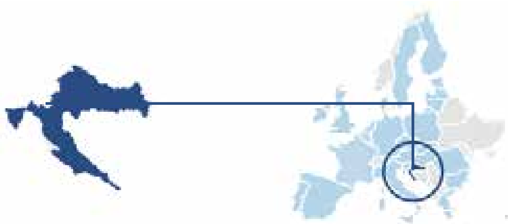


Bulgaria EU

*Numbers reflect "Total 'Agree'"

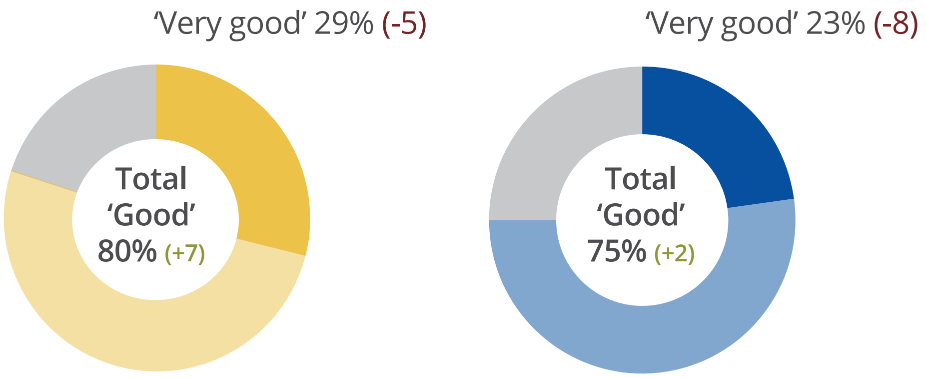
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

CROATIA



GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING



THOSE BENEFITING MOST FROM IP (TOP 4)

	Croatia		EU	
Big companies	22%	(-1)	24%	(-1)
Famous performing artists	15%	(+3)	20%	(+3)
Inventors	16%	(-10)	13%	(-4)
Consumers like myself	5%	(+2)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Croatia		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(+1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	88%	(=)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	88%	(+1)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Croatia EU

EUIPO
EUROPEAN UNION
INTELLECTUAL PROPERTY OFFICE

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Croatia		EU	
If there was no longer any IP there would be economic chaos	73%	(-5)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	60%	(-10)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	47%		50%	
NEW 2016 IP principles are not adapted to the Internet	52%		48%	

ILLEGAL BEHAVIOURS

	Croatia		EU	
Bought counterfeit products intentionally	9%	(+8)	7%	(+3)

Buying counterfeit products*

	Croatia		EU	
ruins businesses and jobs	82%	(+10)	78%	(-3)
supports child labour and illegal trafficking	70%	(-1)	68%	(-3)
poses a threat to health	74%	(+10)	66%	(-1)
discourages companies from inventing new products	56%	(-6)	49%	(-4)

It is acceptable when*

	Croatia		EU	
the price for the original product is too high	32%	(+5)	27%	(+3)
the original is not or not yet available where you live	27%	(+1)	24%	(+6)
the quality of the product does not matter	25%	(+3)	21%	(+4)

Croatia EU

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Croatia	EU
Availability of affordable original products	62%	63%
Personal bad experience with a counterfeit product	17%	41%
Risk of punishment	17%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	4%	28%

RESPONSIBLE BEHAVIOURS

	Croatia	EU
Bought counterfeit products as a result of being misled	14% (+4)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	44%	35%

ILLEGAL BEHAVIOURS

	Croatia	EU
Downloaded/streamed from illegal sources	12% (-6)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	77% (+6)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	62%	69%
NEW 2016 Diversity of legal offer is better than illegal	51%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	41% (-10)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	39% (+17)	31% (+9)

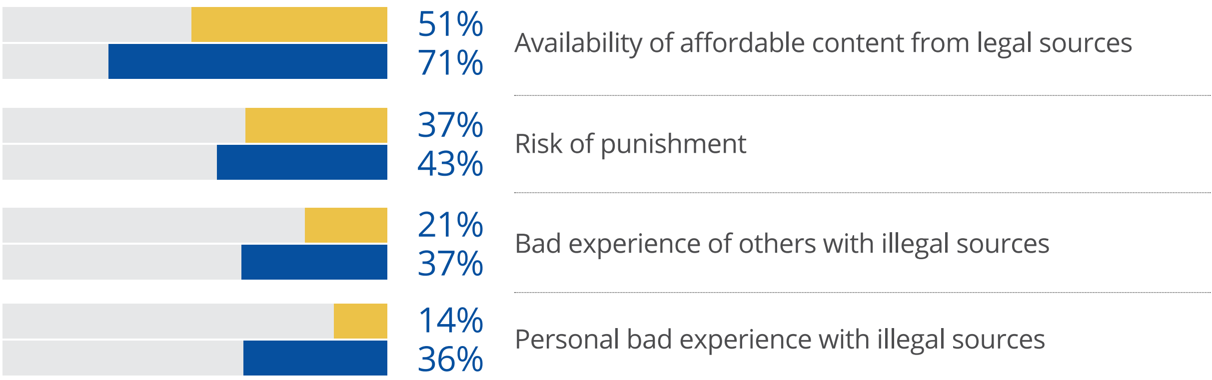
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

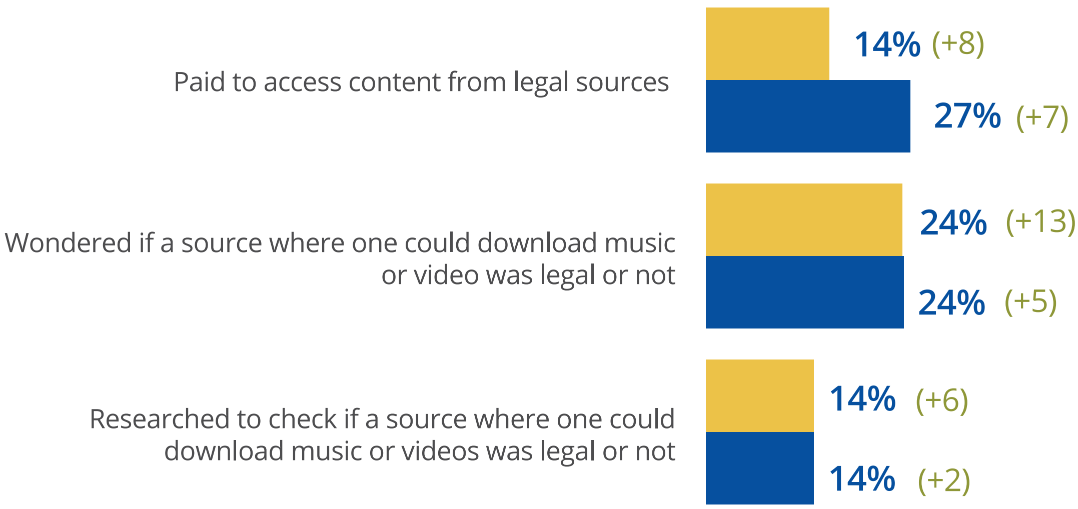
Croatia EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



Croatia EU

*Numbers reflect "Total 'Agree'"

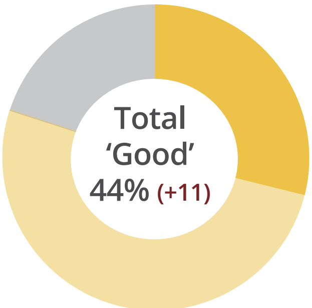
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

GENERAL PERCEPTIONS OF IP

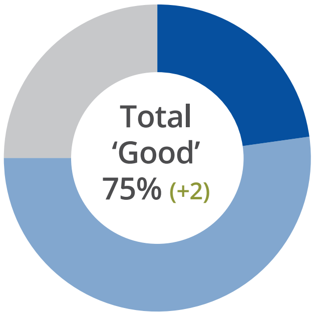
CYPRUS

IP UNDERSTANDING

'Very good' 22 % (-8)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Cyprus		EU	
Big companies	30%	(-2)	24%	(-1)
Famous performing artists	15%	(+4)	20%	(+3)
Inventors	20%	(+1)	13%	(-4)
Consumers like myself	3%	(-4)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Cyprus		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(+1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	89%	(+1)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	87%	(+1)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Cyprus EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Cyprus		EU	
If there was no longer any IP there would be economic chaos	74%	(-6)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	64%	(-6)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	54%		50%	
NEW 2016 IP principles are not adapted to the Internet	50%		48%	

ILLEGAL BEHAVIOURS

	Cyprus		EU	
Bought counterfeit products intentionally	18%	(+9)	7%	(+3)

Buying counterfeit products*

	Cyprus		EU	
ruins businesses and jobs	75%	(-8)	78%	(-3)
supports child labour and illegal trafficking	62%	(-5)	68%	(-3)
poses a threat to health	72%	(-2)	66%	(-1)
discourages companies from inventing new products	46%	(-15)	49%	(-4)

It is acceptable when*

	Cyprus		EU	
the price for the original product is too high	50%	(+8)	27%	(+3)
the original is not or not yet available where you live	35%	(+1)	24%	(+6)
the quality of the product does not matter	37%	(-1)	21%	(+4)

Cyprus EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Cyprus	EU
Availability of affordable original products	48%	63%
Personal bad experience with a counterfeit product	30%	41%
Risk of punishment	21%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	14%	28%

RESPONSIBLE BEHAVIOURS

	Cyprus	EU
Bought counterfeit products as a result of being misled	17% (+4)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	58%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Cyprus	EU
Downloaded/streamed from illegal sources	14% (-6)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	74% (+2)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	66%	69%
NEW 2016 Diversity of legal offer is better than illegal	60%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	36% (-18)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	38% (+4)	31% (+9)

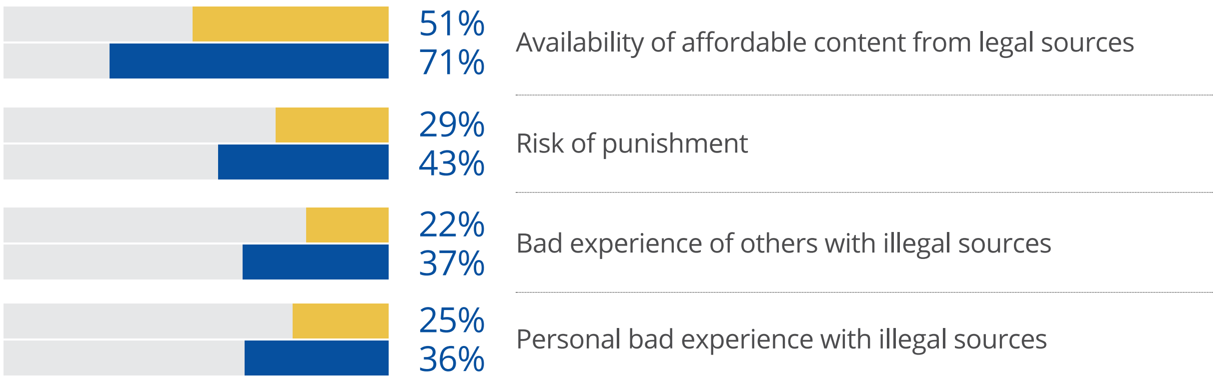
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

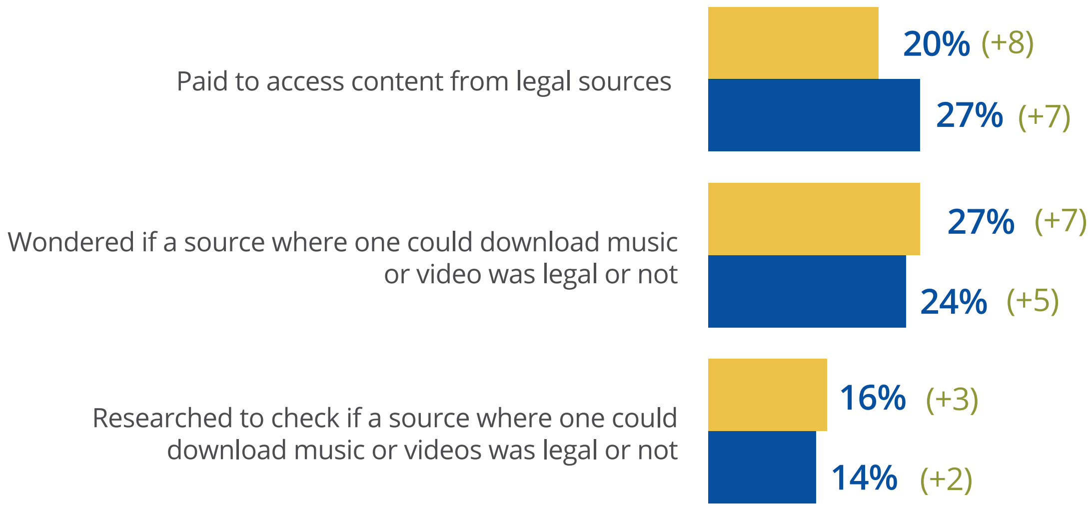
Cyprus EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



Cyprus EU

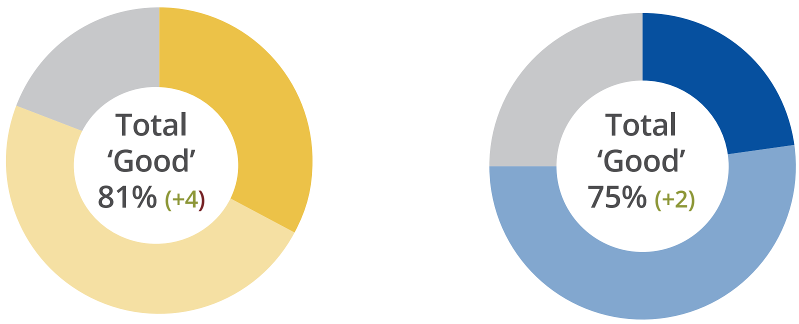
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

CZECH REPUBLIC

IP UNDERSTANDING

'Very good' 33 % (-6) | 'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Czech Republic		EU	
Big companies	27%	(+1)	24%	(-1)
Famous performing artists	29%	(+8)	20%	(+3)
Inventors	10%	(-3)	13%	(-4)
Consumers like myself	4%	(=)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Czech Republic		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	96%	(=)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	90%	(+6)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	84%	(=)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Czech Republic | EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

		Czech Republic		EU	
	If there was no longer any IP there would be economic chaos	67%	(=)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	56%	(-7)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	51%		50%	
NEW 2016	IP principles are not adapted to the Internet	49%		48%	

ILLEGAL BEHAVIOURS

	Czech Republic		EU	
Bought counterfeit products intentionally	5%	(+2)	7%	(+3)

		Czech Republic		EU	
Buying counterfeit products*	ruins businesses and jobs	73%	(=)	78%	(-3)
	supports child labour and illegal trafficking	56%	(-5)	68%	(-3)
	poses a threat to health	60%	(-3)	66%	(-1)
	discourages companies from inventing new products	40%	(-5)	49%	(-4)
It is acceptable when*	the price for the original product is too high	27%	(+9)	27%	(+3)
	the original is not or not yet available where you live	25%	(+9)	24%	(+6)
	the quality of the product does not matter	19%	(+6)	21%	(+4)

Czech Republic EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

Czech Republic	EU	Reason
87%	63%	Availability of affordable original products
66%	41%	Personal bad experience with a counterfeit product
49%	33%	Risk of punishment
27%	28%	A better understanding of the harm caused by my behaviour on jobs and on the EU economy

RESPONSIBLE BEHAVIOURS

	Czech Republic	EU
Bought counterfeit products as a result of being misled	10% (+2)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	34%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Czech Republic	EU
Downloaded/streamed from illegal sources	10% (-1)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	68% (+3)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	60%	69%
NEW 2016 Diversity of legal offer is better than illegal	42%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	54% (+19)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	40% (+4)	31% (+9)

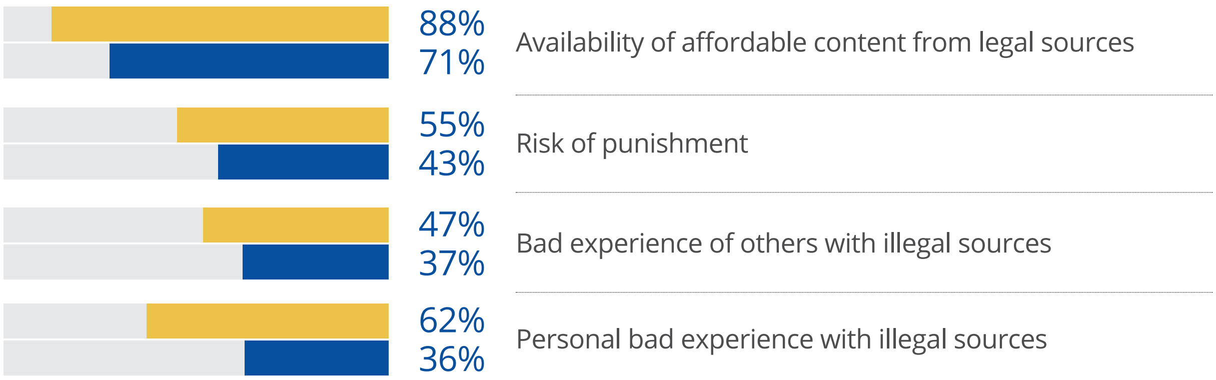
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

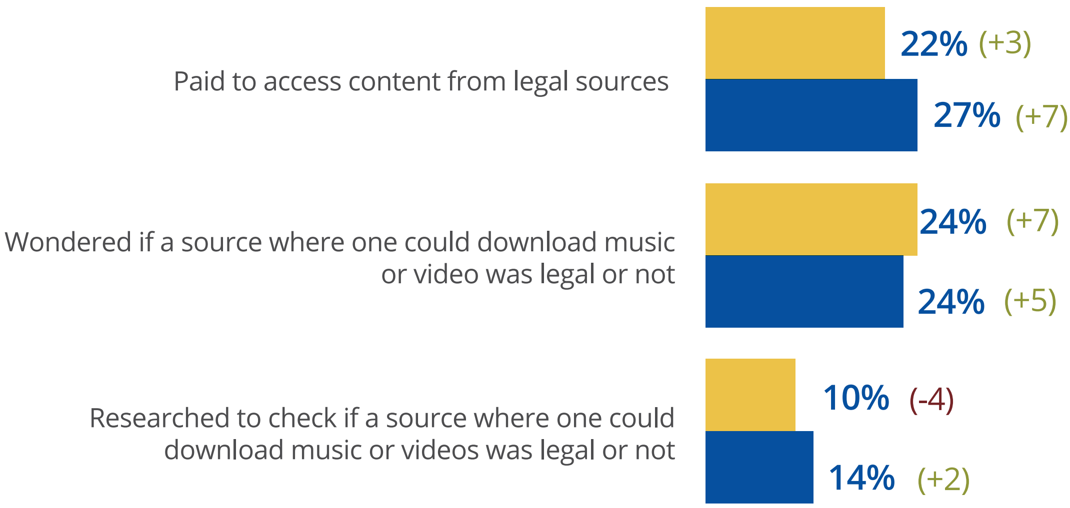
Czech Republic EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



Czech Republic EU

*Numbers reflect "Total 'Agree'"

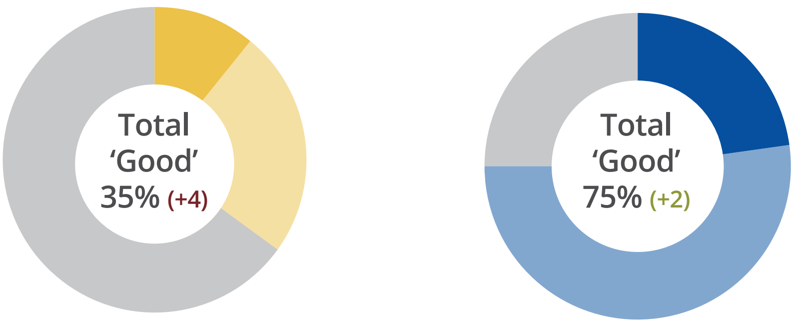
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

DENMARK

GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING

'Very good' 11 % (-1) | 'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Denmark	EU
Big companies	15% (-4)	24% (-1)
Famous performing artists	24% (+3)	20% (+3)
Inventors	11% (-4)	13% (-4)
Consumers like myself	4% (=)	5% (+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Denmark	EU
inventors, creators and performing artists can protect their rights and be paid for their work	97% (=)	97% (+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	85% (+6)	89% (+3)
it contributes to improving and guaranteeing the quality of products and services	82% (=)	88% (+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Denmark EU

IP AND INNOVATION*

		Denmark		EU	
	If there was no longer any IP there would be economic chaos	53%	(=)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	53%	(-8)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	50%		50%	
NEW 2016	IP principles are not adapted to the Internet	51%		48%	

ILLEGAL BEHAVIOURS

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

Bought counterfeit products intentionally

Denmark	9% (+6)
EU	7% (+3)

Buying counterfeit products*

	Denmark		EU	
ruins businesses and jobs	77%	(-8)	78%	(-3)
supports child labour and illegal trafficking	60%	(+4)	68%	(-3)
poses a threat to health	48%	(+8)	66%	(-1)
discourages companies from inventing new products	40%	(+3)	49%	(-4)

It is acceptable when*

	Denmark		EU	
the price for the original product is too high	24%	(+7)	27%	(+3)
the original is not or not yet available where you live	27%	(+11)	24%	(+6)
the quality of the product does not matter	24%	(+8)	21%	(+4)

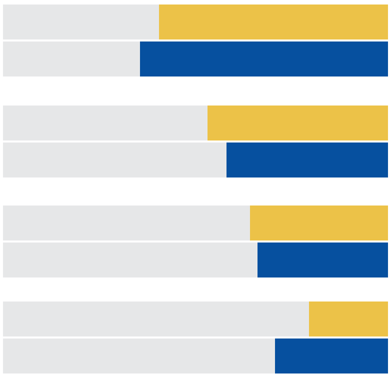
Denmark EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

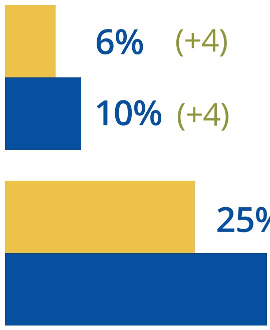
NEW 2016

TOP REASONS TO STOP BUYING FAKES



Denmark	EU	
59%	63%	Availability of affordable original products
46%	41%	Personal bad experience with a counterfeit product
36%	33%	Risk of punishment
20%	28%	A better understanding of the harm caused by my behaviour on jobs and on the EU economy

RESPONSIBLE BEHAVIOURS



	Denmark	EU
Bought counterfeit products as a result of being misled	6% (+4)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	25%	35%

ILLEGAL BEHAVIOURS

	Denmark	EU
Downloaded/streamed from illegal sources	10% (=)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	87% (+3)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	51%	69%
NEW 2016 Diversity of legal offer is better than illegal	39%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	22% (-16)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	25% (+7)	31% (+9)

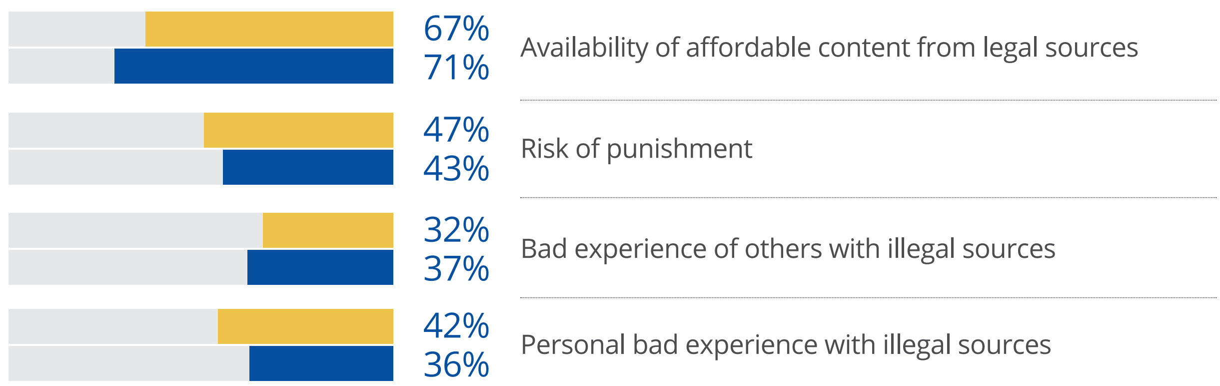
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

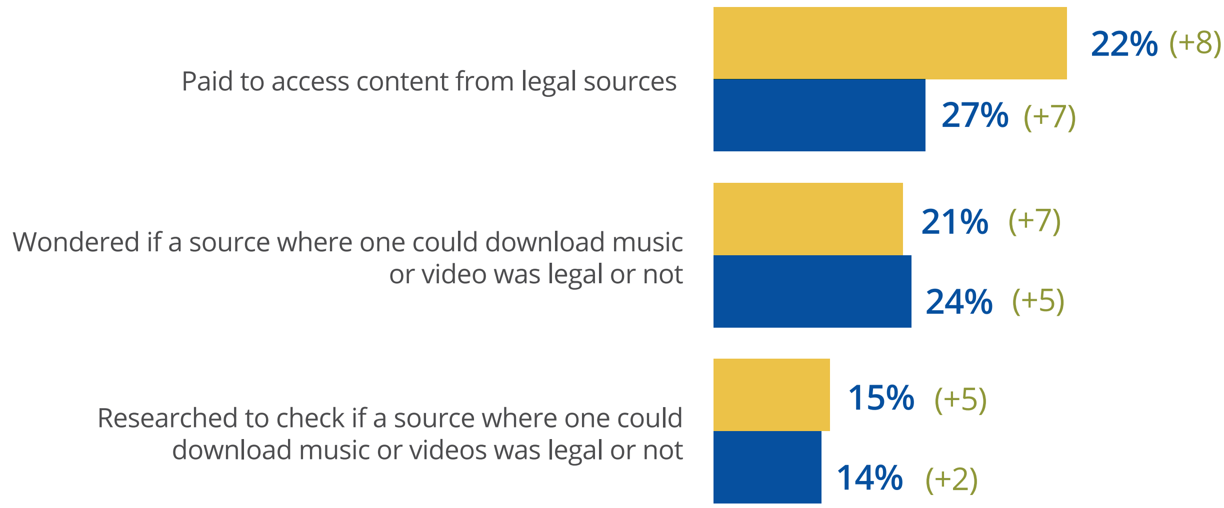
Denmark EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



Denmark EU

*Numbers reflect "Total 'Agree'"

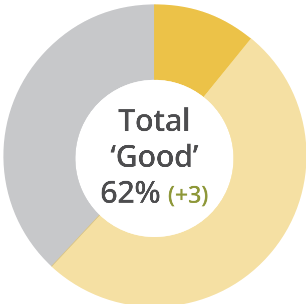
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

ESTONIA

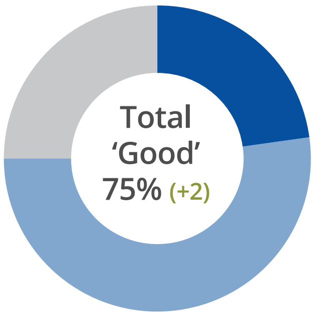
GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING

'Very good' 11 % (-7)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Estonia		EU	
Big companies	21%	(=)	24%	(-1)
Famous performing artists	25%	(+12)	20%	(+3)
Inventors	13%	(-3)	13%	(-4)
Consumers like myself	2%	(=)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Estonia		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	98%	(+2	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	82%	(+4)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	88%	(+5)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Estonia EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

		Estonia		EU	
	If there was no longer any IP there would be economic chaos	65%	(+3)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	68%	(+3)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	50%		50%	
NEW 2016	IP principles are not adapted to the Internet	37%		48%	

ILLEGAL BEHAVIOURS

	Estonia		EU	
Bought counterfeit products intentionally	8%	(+3)	7%	(+3)

Buying counterfeit products*

	Estonia		EU	
ruins businesses and jobs	70%	(-3)	78%	(-3)
supports child labour and illegal trafficking	70%	(=)	68%	(-3)
poses a threat to health	76%	(+6)	66%	(-1)
discourages companies from inventing new products	63%	(+5)	49%	(-4)

It is acceptable when*

	Estonia		EU	
the price for the original product is too high	41%	(+1)	27%	(+3)
the original is not or not yet available where you live	35%	(+2)	24%	(+6)
the quality of the product does not matter	33%	(+6)	21%	(+4)

Estonia EU

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

TOP REASONS TO STOP BUYING FAKES

NEW 2016

	Estonia	EU
Availability of affordable original products	74%	63%
Personal bad experience with a counterfeit product	33%	41%
Risk of punishment	30%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	10%	28%

RESPONSIBLE BEHAVIOURS

	Estonia	EU
Bought counterfeit products as a result of being misled	10% (+2)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	29%	35%

ILLEGAL BEHAVIOURS

	Estonia	EU
Downloaded/streamed from illegal sources	11% (-5)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	76% (+5)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	64%	69%
NEW 2016 Diversity of legal offer is better than illegal	49%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	52% (+9)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	37% (+10)	31% (+9)

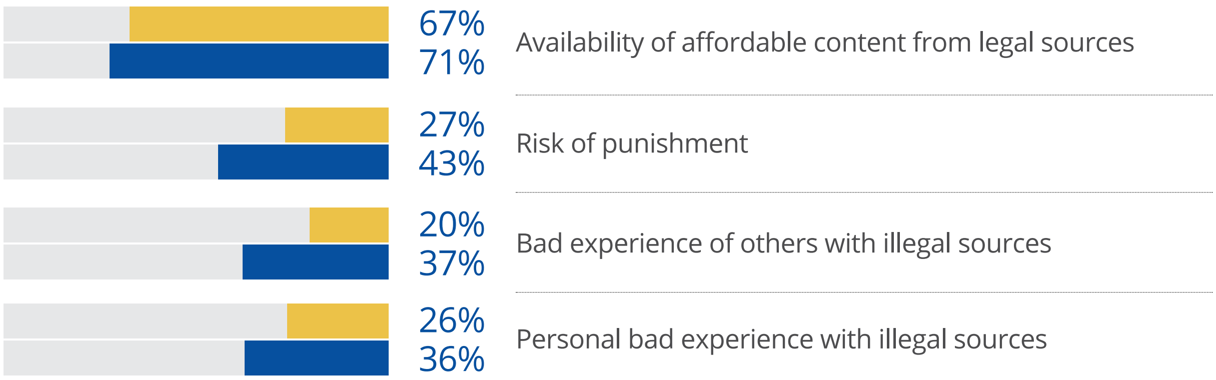
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

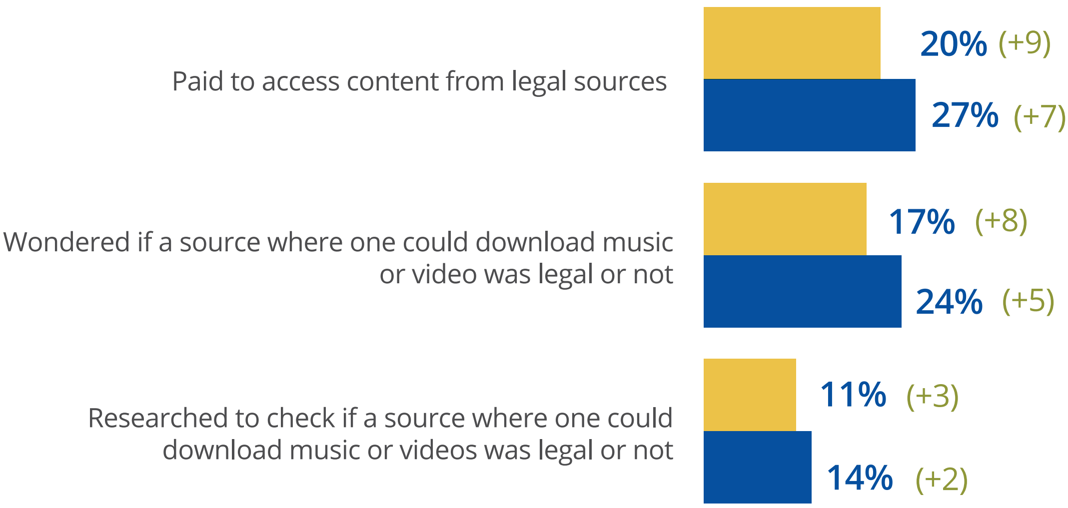
Estonia EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



Estonia EU

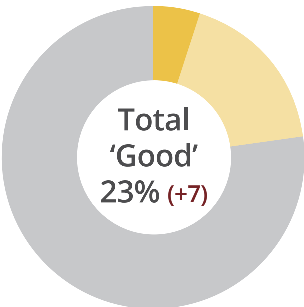
*Numbers reflect "Total 'Agree'"

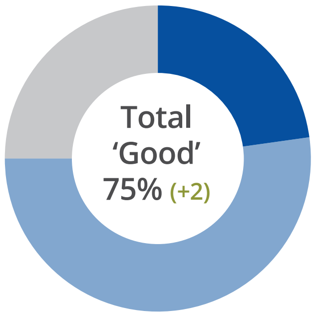
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

FINLAND

GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING





THOSE BENEFITING MOST FROM IP (TOP 4)

	Finland		EU	
Big companies	12%	(-6)	24%	(-1)
Famous performing artists	28%	(+11)	20%	(+3)
Inventors	8%	(-3)	13%	(-4)
Consumers like myself	1%	(-3)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Finland		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	98%	(=)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	91%	(+8)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	92%	(+5)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Finland EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

		Finland		EU	
	If there was no longer any IP there would be economic chaos	58%	(+9)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	68%	(+1)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	47%		50%	
NEW 2016	IP principles are not adapted to the Internet	57%		48%	

ILLEGAL BEHAVIOURS

	Finland		EU	
Bought counterfeit products intentionally	4%	(+3)	7%	(+3)

		Finland		EU	
Buying counterfeit products*	ruins businesses and jobs	81%	(-2)	78%	(-3)
	supports child labour and illegal trafficking	84%	(+2)	68%	(-3)
	poses a threat to health	68%	(+7)	66%	(-1)
	discourages companies from inventing new products	63%	(+4)	49%	(-4)
It is acceptable when*	the price for the original product is too high	23%	(+8)	27%	(+3)
	the original is not or not yet available where you live	22%	(+10)	24%	(+6)
	the quality of the product does not matter	18%	(+4)	21%	(+4)

Finland EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

Reason	Finland	EU
Availability of affordable original products	56%	63%
Personal bad experience with a counterfeit product	32%	41%
Risk of punishment	17%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	16%	28%

RESPONSIBLE BEHAVIOURS

	Finland	EU
Bought counterfeit products as a result of being misled	4 % (+2)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	33%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Finland	EU
Downloaded/streamed from illegal sources	7% (-5)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	92% (+4)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	77%	69%
NEW 2016 Diversity of legal offer is better than illegal	56%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	40% (-1)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	28% (+12)	31% (+9)

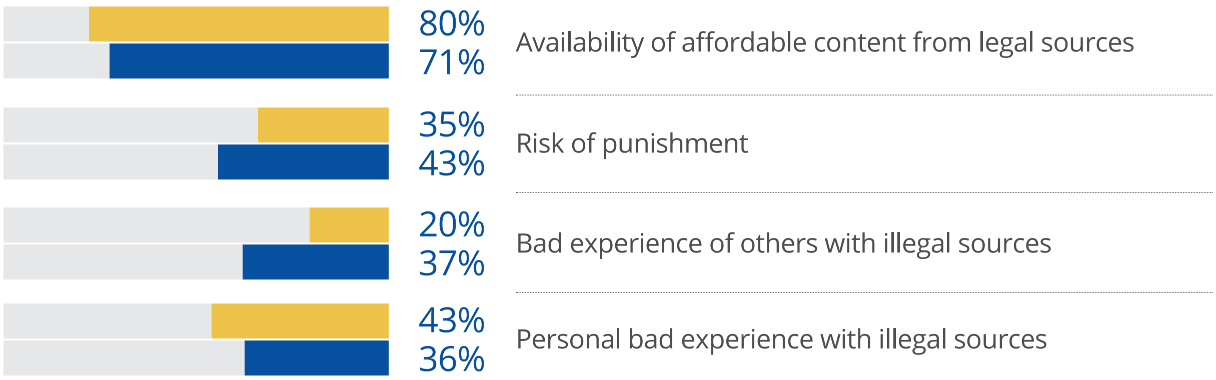
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

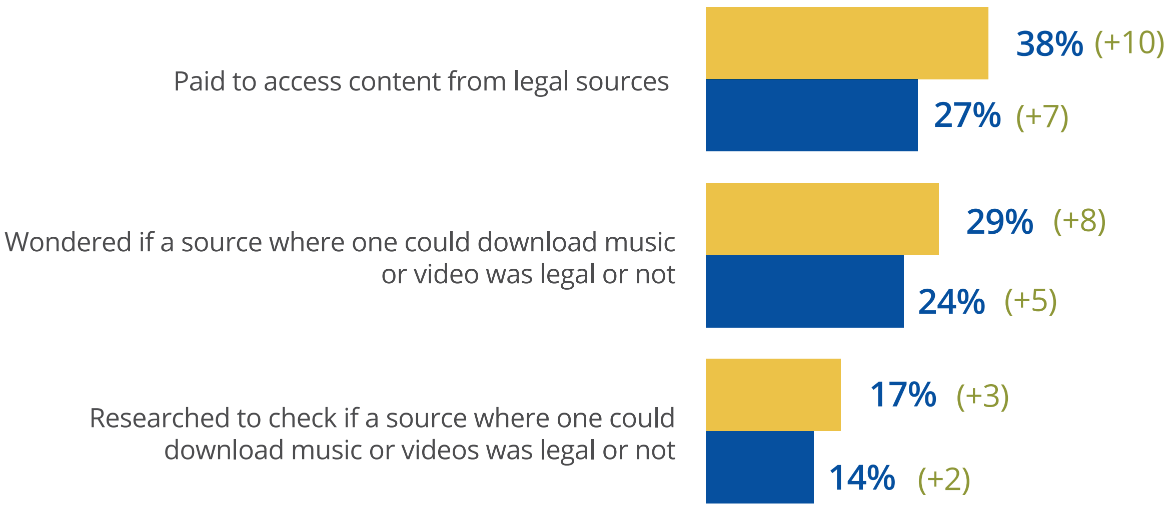
Finland EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



Finland EU

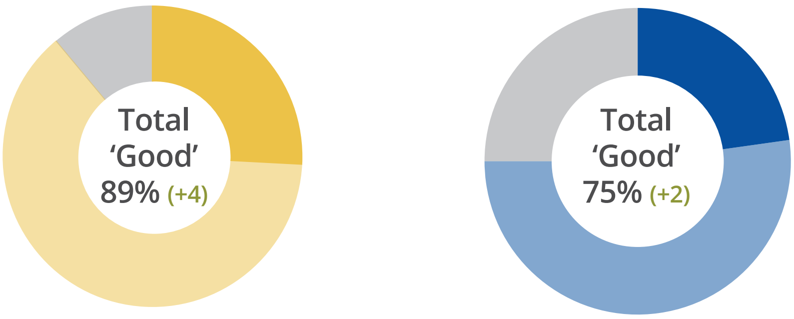
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

FRANCE

GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING



THOSE BENEFITING MOST FROM IP (TOP 4)

	France		EU	
Big companies	23%	(+3)	24%	(-1)
Famous performing artists	20%	(+11)	20%	(+3)
Inventors	16%	(=)	13%	(-4)
Consumers like myself	5%	(+1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	France		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(+2)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	91%	(+2)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	88%	(+2)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

France EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

		France		EU	
	If there was no longer any IP there would be economic chaos	63%	(=)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	65%	(=)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	51%		50%	
NEW 2016	IP principles are not adapted to the Internet	54%		48%	

ILLEGAL BEHAVIOURS

	France		EU	
Bought counterfeit products intentionally	6%	(+3)	7%	(+3)

		France		EU	
Buying counterfeit products*	ruins businesses and jobs	82%	(+1)	78%	(-3)
	supports child labour and illegal trafficking	78%	(-3)	68%	(-3)
	poses a threat to health	77%	(+3)	66%	(-1)
	discourages companies from inventing new products	53%	(-3)	49%	(-4)
It is acceptable when*	the price for the original product is too high	24%	(+2)	27%	(+3)
	the original is not or not yet available where you live	19%	(+3)	24%	(+6)
	the quality of the product does not matter	23%	(+5)	21%	(+4)

France EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP REASONS TO STOP BUYING FAKES

France	EU	
70%	63%	Availability of affordable original products
42%	41%	Personal bad experience with a counterfeit product
43%	33%	Risk of punishment
38%	28%	A better understanding of the harm caused by my behaviour on jobs and on the EU economy

RESPONSIBLE BEHAVIOURS

	France	EU
Bought counterfeit products as a result of being misled	4 % (+2)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	33%	35%

ILLEGAL BEHAVIOURS

	France	EU
Downloaded/streamed from illegal sources	15% (+1)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	85% (+9)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	64%	69%
NEW 2016 Diversity of legal offer is better than illegal	57%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	38% (-5)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	34% (+7)	31% (+9)

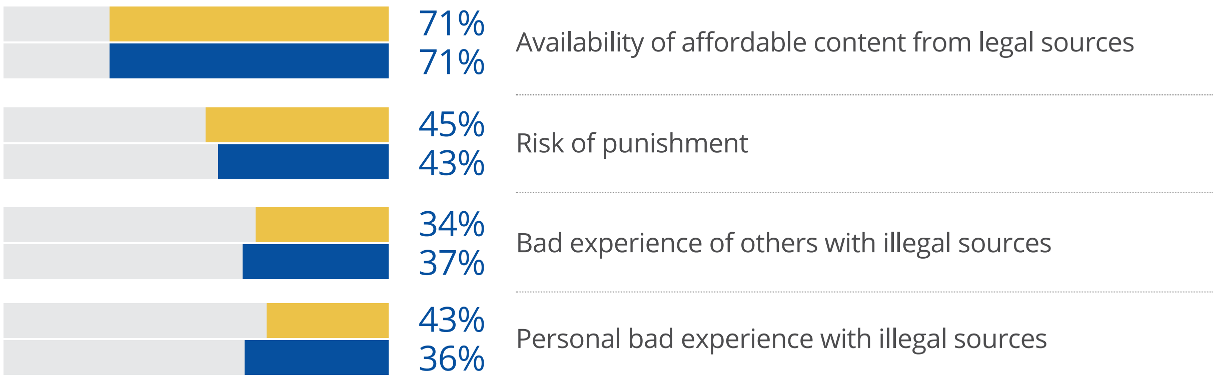
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

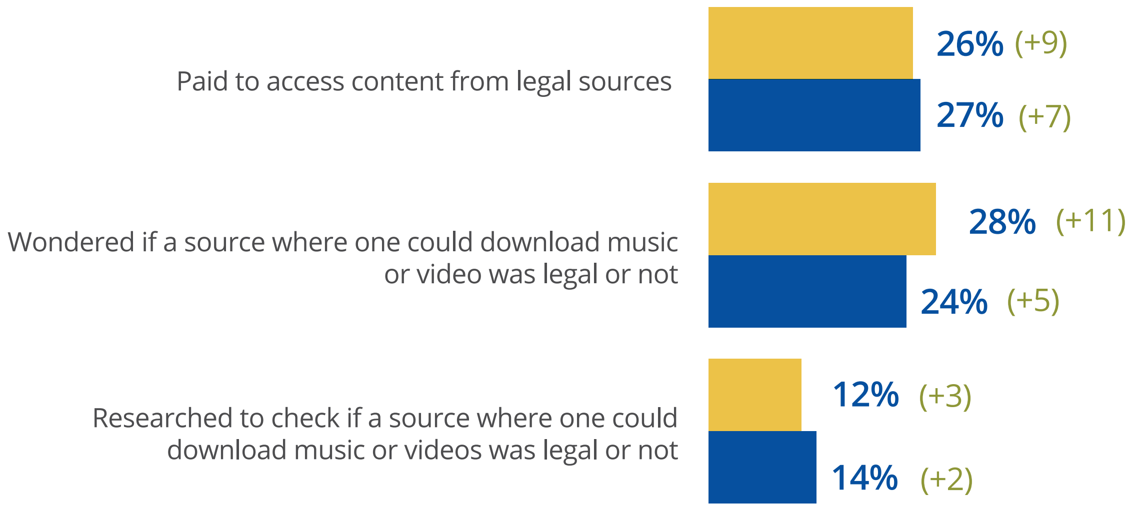
France EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



France EU

*Numbers reflect "Total 'Agree'"

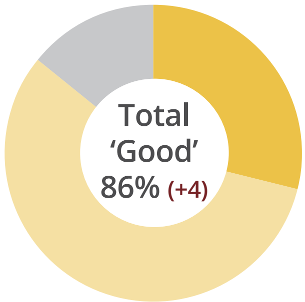
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

GERMANY

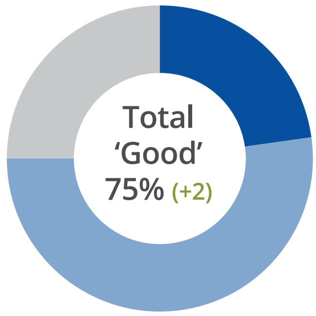
GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING

'Very good' 29 % (-5)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Germany		EU	
Big companies	29%	(-1)	24%	(-1)
Famous performing artists	17%	(=)	20%	(+3)
Inventors	11%	(-4)	13%	(-4)
Consumers like myself	7%	(+1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Germany		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	98%	(+1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	89%	(=)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	85%	(+2)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Germany EU

EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Germany		EU	
If there was no longer any IP there would be economic chaos	67%	(=)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	65%	(-7)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	45%		50%	
NEW 2016 IP principles are not adapted to the Internet	36%		48%	

ILLEGAL BEHAVIOURS

	Germany		EU	
Bought counterfeit products intentionally	4%	(+2)	7%	(+3)
Buying counterfeit products*				
ruins businesses and jobs	80%	(-8)	78%	(-3)
supports child labour and illegal trafficking	72%	(-6)	68%	(-3)
poses a threat to health	58%	(-8)	66%	(-1)
discourages companies from inventing new products	45%	(+1)	49%	(-4)
It is acceptable when*				
the price for the original product is too high	22%	(+6)	27%	(+3)
the original is not or not yet available where you live	21%	(+5)	24%	(+6)
the quality of the product does not matter	19%	(+7)	21%	(+4)

Germany EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

TOP REASONS TO STOP BUYING FAKES

NEW 2016

	Germany	EU
Availability of affordable original products	55%	63%
Personal bad experience with a counterfeit product	55%	41%
Risk of punishment	32%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	31%	28%

RESPONSIBLE BEHAVIOURS

	Germany	EU
Bought counterfeit products as a result of being misled	5 % (+2)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	23%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Germany	EU
Downloaded/streamed from illegal sources	7% (+3)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	82% (+4)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	59%	69%
NEW 2016 Diversity of legal offer is better than illegal	32%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	28% (-9)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	22% (+11)	31% (+9)

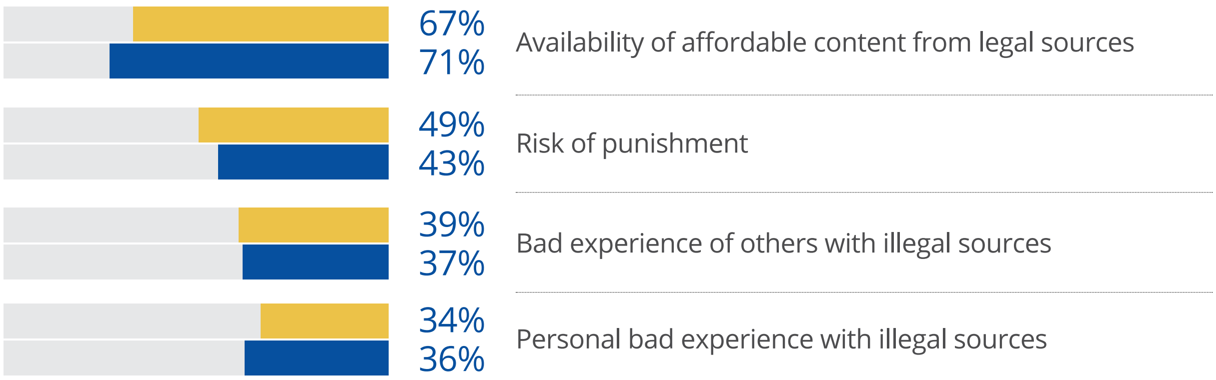
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

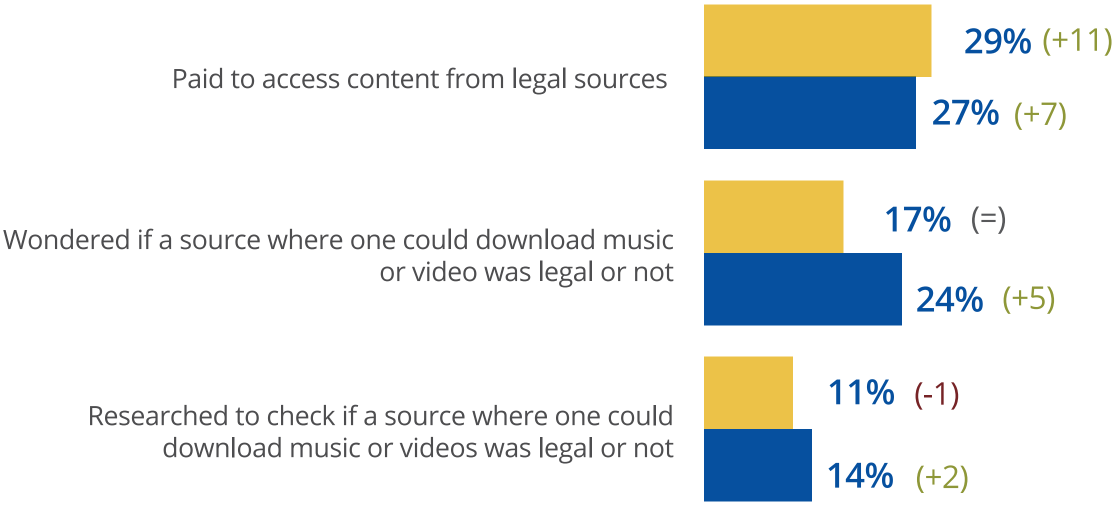
Germany EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



Germany EU

*Numbers reflect "Total 'Agree'"

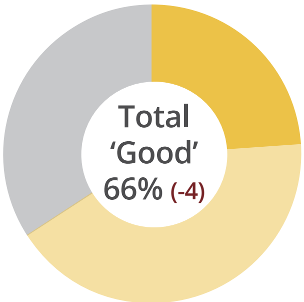
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

GENERAL PERCEPTIONS OF IP

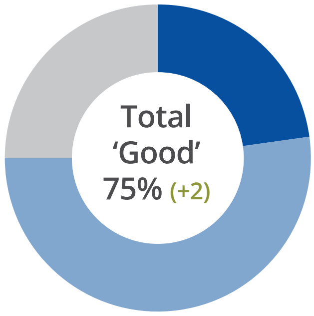
GREECE

IP UNDERSTANDING

'Very good' 24 % (-5)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Greece		EU	
Big companies	28%	(-8)	24%	(-1)
Famous performing artists	17%	(+2)	20%	(+3)
Inventors	13%	(-3)	13%	(-4)
Consumers like myself	6%	(+1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Greece		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	95%	(-1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	89%	(+1)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	89%	(+2)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Greece EU

EUIPO EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

		Greece		EU	
	If there was no longer any IP there would be economic chaos	76%	(-4)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	70%	(-1)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	58%		50%	
NEW 2016	IP principles are not adapted to the Internet	57%		48%	

ILLEGAL BEHAVIOURS

	Greece		EU	
Bought counterfeit products intentionally	12%	(=)	7%	(+3)

		Greece		EU	
Buying counterfeit products*	ruins businesses and jobs	83%	(-5)	78%	(-3)
	supports child labour and illegal trafficking	65%	(-10)	68%	(-3)
	poses a threat to health	73%	(-8)	66%	(-1)
	discourages companies from inventing new products	59%	(-8)	49%	(-4)
It is acceptable when*	the price for the original product is too high	47%	(+6)	27%	(+3)
	the original is not or not yet available where you live	37%	(+2)	24%	(+6)
	the quality of the product does not matter	31%	(-1)	21%	(+4)

Greece EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Greece	EU
Availability of affordable original products	66%	63%
Personal bad experience with a counterfeit product	53%	41%
Risk of punishment	27%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	36%	28%

RESPONSIBLE BEHAVIOURS

	Greece	EU
Bought counterfeit products as a result of being misled	13 % (+2)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	53%	35%

ILLEGAL BEHAVIOURS

	Greece	EU
Downloaded/streamed from illegal sources	12% (+3)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	81% (=)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	80%	69%
NEW 2016 Diversity of legal offer is better than illegal	72%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	34% (-17)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	42% (+8)	31% (+9)

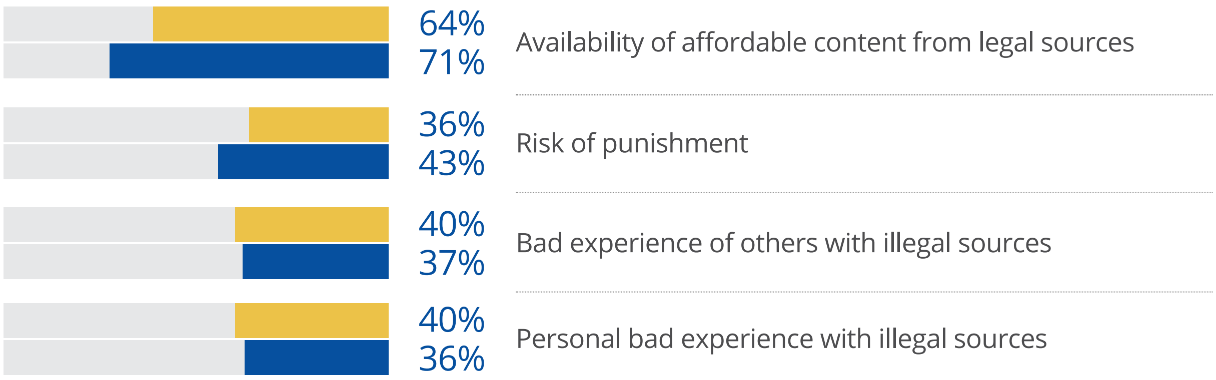
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

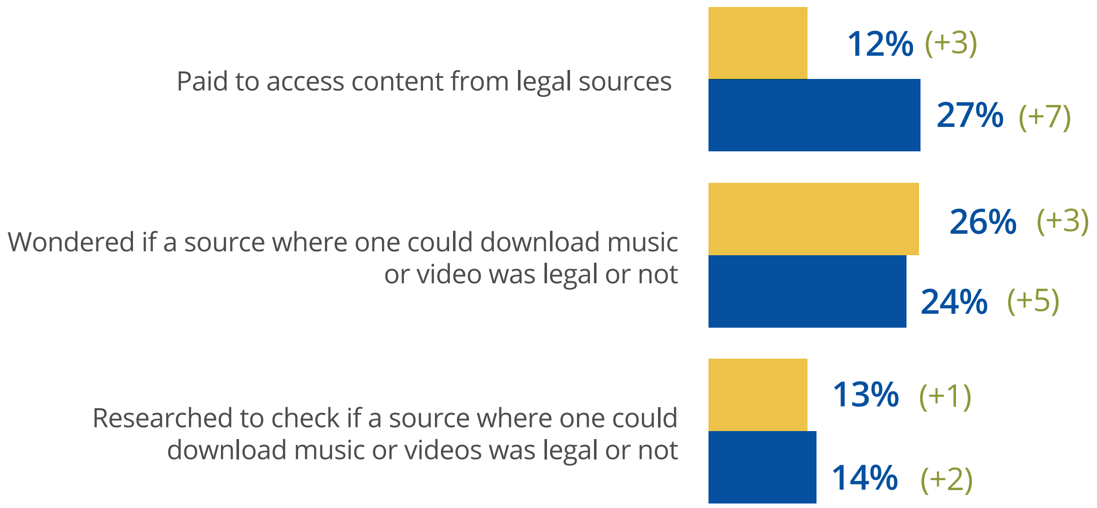
Greece EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS

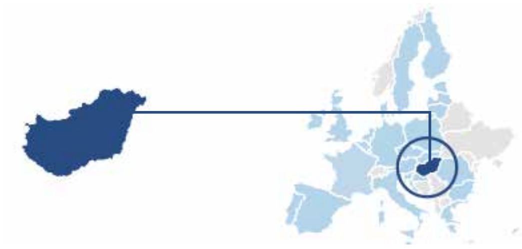


Greece EU

*Numbers reflect "Total 'Agree'"

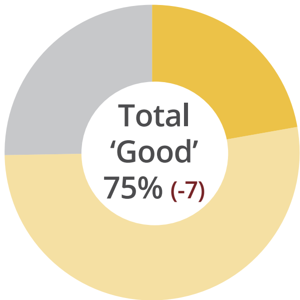
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

HUNGARY

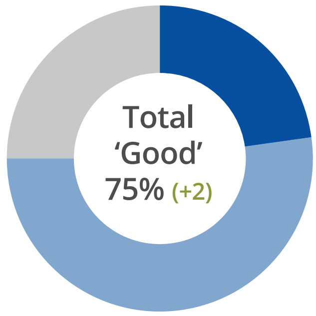


IP UNDERSTANDING

'Very good' 22 % (-12)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Hungary		EU	
Big companies	11%	(-6)	24%	(-1)
Famous performing artists	18%	(+5)	20%	(+3)
Inventors	28%	(-4)	13%	(-4)
Consumers like myself	6%	(+1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Hungary		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	96%	(-2)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	90%	(+3)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	92%	(+1)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Hungary EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Statement	Hungary		EU	
	If there was no longer any IP there would be economic chaos	79%	(-3)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	77%	(-1)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	49%		50%	
NEW 2016	IP principles are not adapted to the Internet	35%		48%	

ILLEGAL BEHAVIOURS

	Hungary		EU	
Bought counterfeit products intentionally	6%	(+4)	7%	(+3)

	Statement	Hungary		EU	
Buying counterfeit products*	ruins businesses and jobs	81%	(-4)	78%	(-3)
	supports child labour and illegal trafficking	61%	(-5)	68%	(-3)
	poses a threat to health	77%	(+1)	66%	(-1)
	discourages companies from inventing new products	51%	(-7)	49%	(-4)
It is acceptable when*	the price for the original product is too high	31%	(+4)	27%	(+3)
	the original is not or not yet available where you live	22%	(+1)	24%	(+6)
	the quality of the product does not matter	24%	(+4)	21%	(+4)

Hungary EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Hungary	EU
Availability of affordable original products	43%	63%
Personal bad experience with a counterfeit product	49%	41%
Risk of punishment	28%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	14%	28%

RESPONSIBLE BEHAVIOURS

	Hungary	EU
Bought counterfeit products as a result of being misled	17 % (+4)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	42%	35%

ILLEGAL BEHAVIOURS

	Hungary	EU
Downloaded/streamed from illegal sources	6% (+1)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	72% (-11)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	67%	69%
NEW 2016 Diversity of legal offer is better than illegal	58%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	36% (+6)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	25% (+7)	31% (+9)

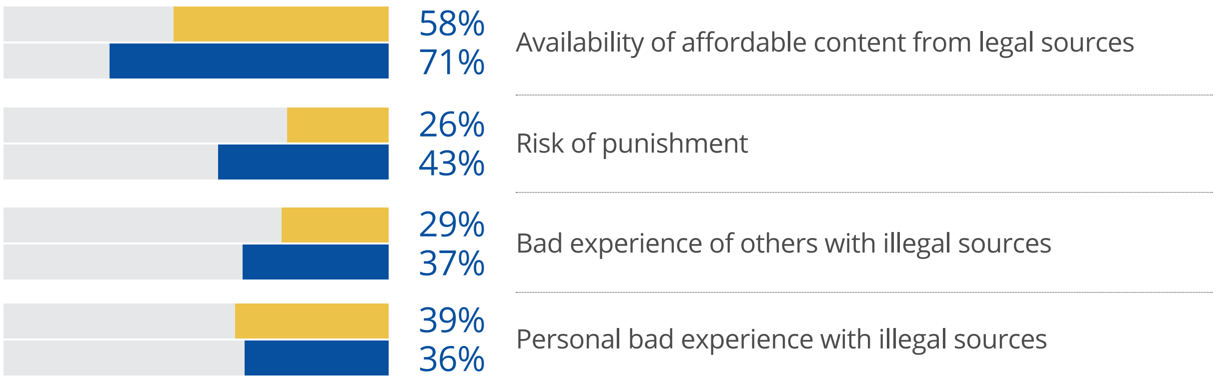
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

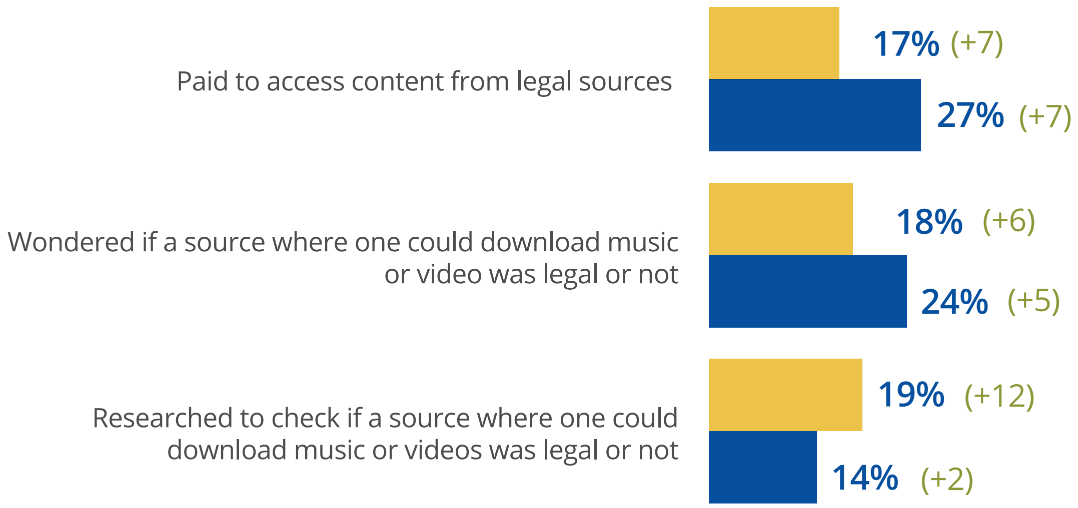
Hungary EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



Hungary EU

*Numbers reflect "Total 'Agree'"

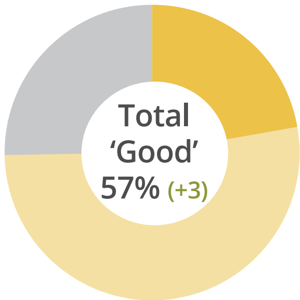
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

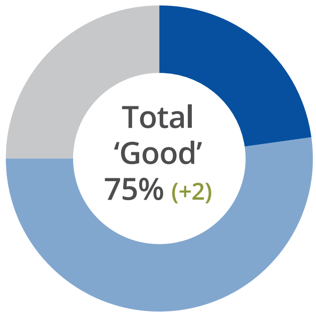
IRELAND

GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING

Ireland	EU
'Very good' 21 % (+1)	'Very good' 23% (-8)





THOSE BENEFITING MOST FROM IP (TOP 4)

	Ireland		EU	
Big companies	31%	(-2)	24%	(-1)
Famous performing artists	14%	(+2)	20%	(+3)
Inventors	14%	(-5)	13%	(-4)
Consumers like myself	5%	(+1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Ireland		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(=)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	89%	(+2)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	89%	(-3)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Ireland | EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

		Ireland		EU	
	If there was no longer any IP there would be economic chaos	68%	(+1)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	65%	(-10)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	54%		50%	
NEW 2016	IP principles are not adapted to the Internet	54%		48%	

ILLEGAL BEHAVIOURS

	Ireland	EU
Bought counterfeit products intentionally	6% (+2)	7% (+3)

		Ireland		EU	
Buying counterfeit products*	ruins businesses and jobs	82%	(-5)	78%	(-3)
	supports child labour and illegal trafficking	71%	(-5)	68%	(-3)
	poses a threat to health	65%	(+1)	66%	(-1)
	discourages companies from inventing new products	52%	(-3)	49%	(-4)
It is acceptable when*	the price for the original product is too high	28%	(+5)	27%	(+3)
	the original is not or not yet available where you live	23%	(+6)	24%	(+6)
	the quality of the product does not matter	18%	(+2)	21%	(+4)

Ireland EU

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

Ireland	EU	
55%	63%	Availability of affordable original products
53%	41%	Personal bad experience with a counterfeit product
48%	33%	Risk of punishment
30%	28%	A better understanding of the harm caused by my behaviour on jobs and on the EU economy

RESPONSIBLE BEHAVIOURS

	Ireland	EU
Bought counterfeit products as a result of being misled	7 % (+2)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	22%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Ireland	EU
Downloaded/streamed from illegal sources	13% (-3)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	84% (-3)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	78%	69%
NEW 2016 Diversity of legal offer is better than illegal	65%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	23% (-20)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	27% (+4)	31% (+9)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Ireland EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES

Reason	Ireland	EU
Availability of affordable content from legal sources	70%	71%
Risk of punishment	43%	43%
Bad experience of others with illegal sources	50%	37%
Personal bad experience with illegal sources	53%	36%

RESPONSIBLE BEHAVIOURS

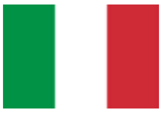
Behaviour	Ireland	EU
Paid to access content from legal sources	34% (=)	27% (+7)
Wondered if a source where one could download music or video was legal or not	25% (-1)	24% (+5)
Researched to check if a source where one could download music or videos was legal or not	15% (-3)	14% (+2)

Ireland EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

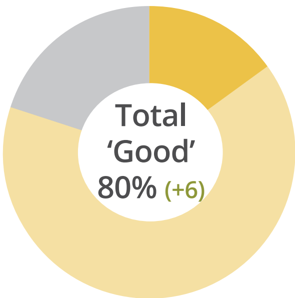
ITALY



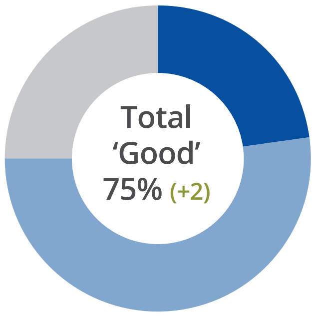
GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING

'Very good' 15 % (-11)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Italy		EU	
Big companies	19%	(-3)	24%	(-1)
Famous performing artists	24%	(+9)	20%	(+3)
Inventors	12%	(-8)	13%	(-4)
Consumers like myself	4%	(=)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Italy		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(-1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	90%	(+1)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	93%	(+3)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Italy EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

		Italy		EU	
	If there was no longer any IP there would be economic chaos	74%	(-2)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	81%	(+2)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	45%		50%	
NEW 2016	IP principles are not adapted to the Internet	38%		48%	

ILLEGAL BEHAVIOURS

Bought counterfeit products intentionally: Italy 7% (+4); EU 7% (+3)

		Italy		EU	
Buying counterfeit products*	ruins businesses and jobs	91%	(-1)	78%	(-3)
	supports child labour and illegal trafficking	80%	(-8)	68%	(-3)
	poses a threat to health	78%	(-4)	66%	(-1)
	discourages companies from inventing new products	44%	(-8)	49%	(-4)
It is acceptable when*	the price for the original product is too high	19%	(-3)	27%	(+3)
	the original is not or not yet available where you live	20%	(+8)	24%	(+6)
	the quality of the product does not matter	11%	(-6)	21%	(+4)

Italy EU

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

Italy	EU	Reason
48%	63%	Availability of affordable original products
26%	41%	Personal bad experience with a counterfeit product
21%	33%	Risk of punishment
9%	28%	A better understanding of the harm caused by my behaviour on jobs and on the EU economy

RESPONSIBLE BEHAVIOURS

	Italy	EU
Bought counterfeit products as a result of being misled	10 % (+6)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	46%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Italy	EU
Downloaded/streamed from illegal sources	7% (+2)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	83% (+6)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	78%	69%
NEW 2016 Diversity of legal offer is better than illegal	70%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	28% (-8)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	29% (+10)	31% (+9)

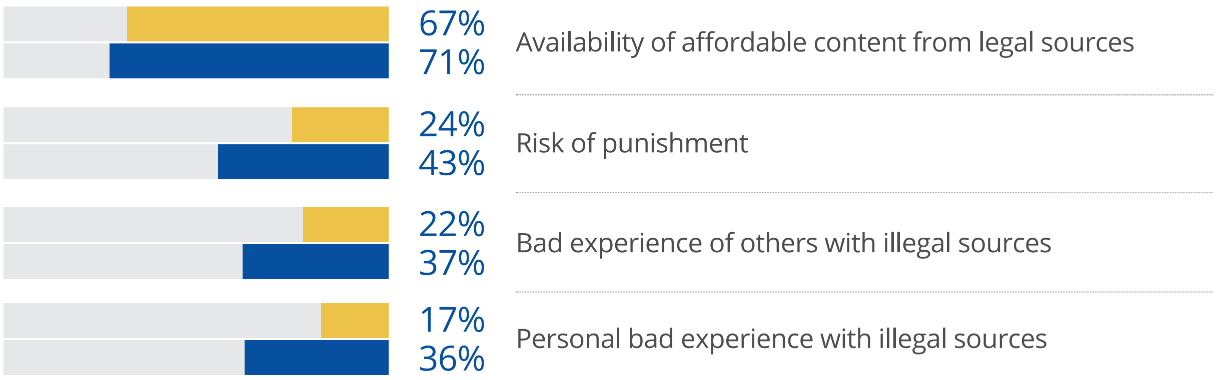
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

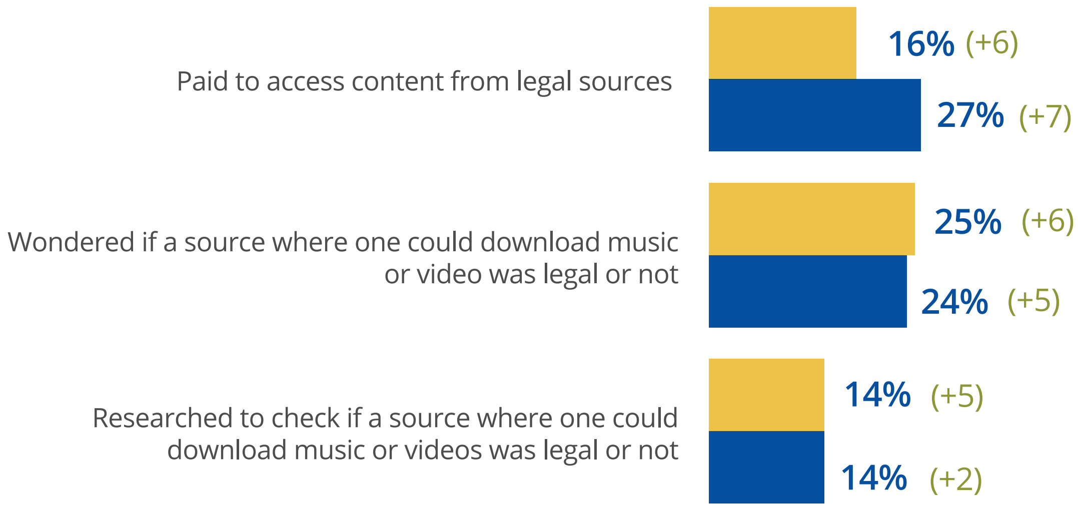
Italy EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



Italy EU

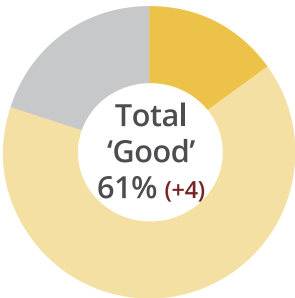
*Numbers reflect "Total 'Agree'"

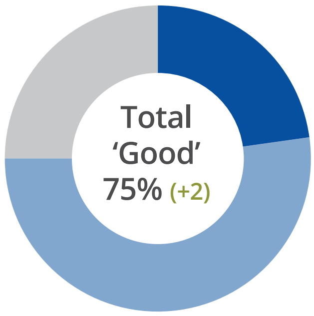
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

LATVIA

GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING





THOSE BENEFITING MOST FROM IP (TOP 4)

	Latvia		EU	
Big companies	15%	(-3)	24%	(-1)
Famous performing artists	27%	(+9)	20%	(+3)
Inventors	16%	(-6)	13%	(-4)
Consumers like myself	4%	(+1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Latvia		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	99%	(+4)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	88%	(+3)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	92%	(+9)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Latvia EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Latvia		EU	
If there was no longer any IP there would be economic chaos	66%	(+5)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	77%	(=)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	58%		50%	
NEW 2016 IP principles are not adapted to the Internet	54%		48%	

ILLEGAL BEHAVIOURS

	Latvia		EU	
Bought counterfeit products intentionally	8%	(-1)	7%	(+3)

Buying counterfeit products*

	Latvia		EU	
ruins businesses and jobs	76%	(+3)	78%	(-3)
supports child labour and illegal trafficking	54%	(-4)	68%	(-3)
poses a threat to health	75%	(+9)	66%	(-1)
discourages companies from inventing new products	51%	(-4)	49%	(-4)

It is acceptable when*

	Latvia		EU	
the price for the original product is too high	37%	(-6)	27%	(+3)
the original is not or not yet available where you live	30%	(-1)	24%	(+6)
the quality of the product does not matter	34%	(=)	21%	(+4)

Latvia EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Latvia	EU
Availability of affordable original products	66%	63%
Personal bad experience with a counterfeit product	33%	41%
Risk of punishment	22%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	13%	28%

RESPONSIBLE BEHAVIOURS

	Latvia	EU
Bought counterfeit products as a result of being misled	15 % (+6)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	44%	35%

ILLEGAL BEHAVIOURS

	Latvia	EU
Downloaded/streamed from illegal sources	14% (-6)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	82% (+2)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	78%	69%
NEW 2016 Diversity of legal offer is better than illegal	49%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	51% (-13)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	45% (+7)	31% (+9)

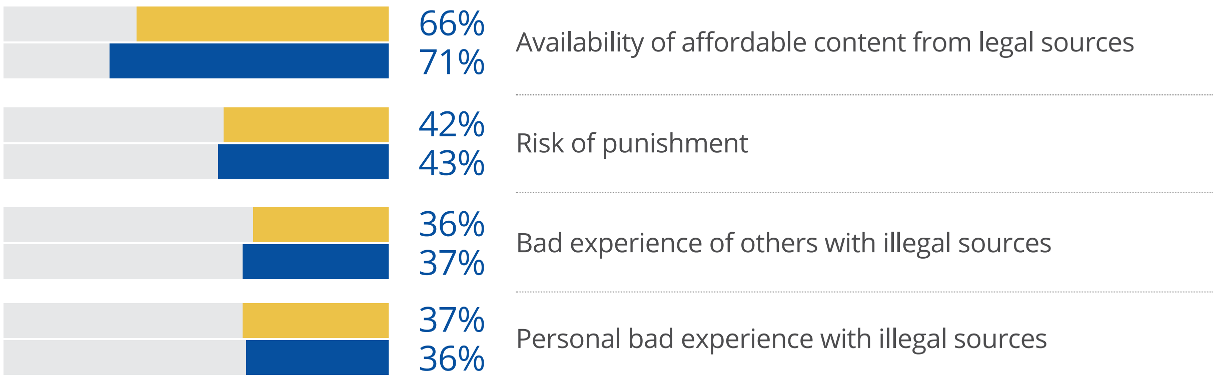
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

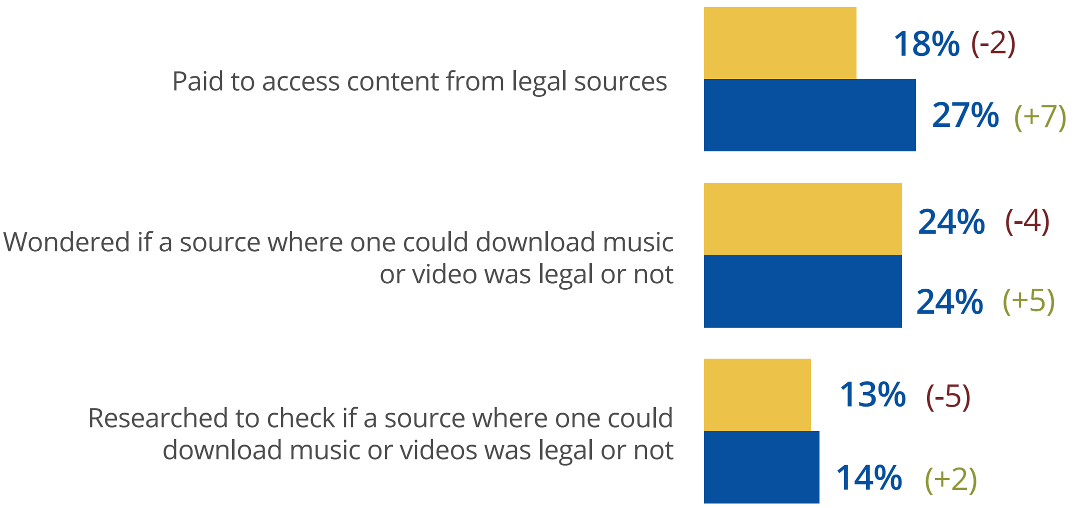
Latvia EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



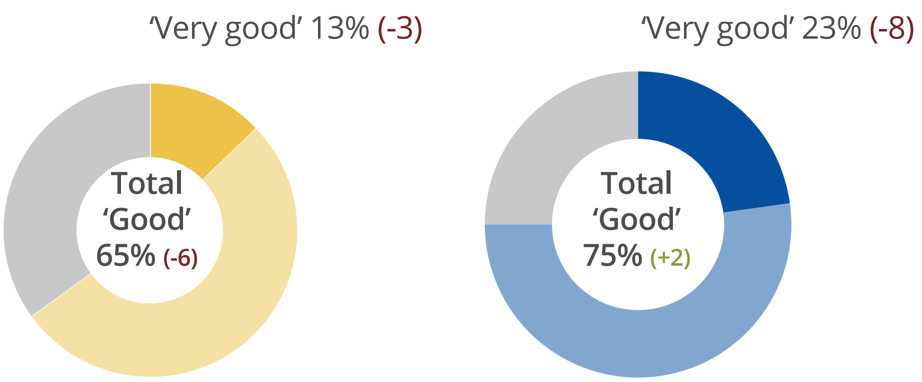
Latvia EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

LITHUANIA

IP UNDERSTANDING



THOSE BENEFITING MOST FROM IP (TOP 4)

	Lithuania		EU	
Big companies	5%	(-21)	24%	(-1)
Famous performing artists	16%	(+5)	20%	(+3)
Inventors	24%	(-14)	13%	(-4)
Consumers like myself	5%	(=)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Lithuania		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(=)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	83%	(+2)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	92%	(+4)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

LITHUANIA EU

EUIPO
EUROPEAN UNION
INTELLECTUAL PROPERTY OFFICE

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Luxembourg		EU	
If there was no longer any IP there would be economic chaos	55%	(-6)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	77%	(-1)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	58%		50%	
NEW 2016 IP principles are not adapted to the Internet	47%		48%	

ILLEGAL BEHAVIOURS

	Luxembourg		EU	
Bought counterfeit products intentionally	17%	(+8)	7%	(+3)

Buying counterfeit products*

	Luxembourg		EU	
ruins businesses and jobs	79%	(-1)	78%	(-3)
supports child labour and illegal trafficking	61%	(-1)	68%	(-3)
poses a threat to health	73%	(+4)	66%	(-1)
discourages companies from inventing new products	61%	(-1)	49%	(-4)

It is acceptable when*

	Luxembourg		EU	
the price for the original product is too high	45%	(+4)	27%	(+3)
the original is not or not yet available where you live	48%	(+9)	24%	(+6)
the quality of the product does not matter	32%	(+9)	21%	(+4)

LUXEMBOURG EU

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Lithuania	EU
Availability of affordable original products	53%	63%
Personal bad experience with a counterfeit product	22%	41%
Risk of punishment	16%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	15%	28%

RESPONSIBLE BEHAVIOURS

	Lithuania	EU
Bought counterfeit products as a result of being misled	19% (+7)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	45%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Lithuania	EU
Downloaded/streamed from illegal sources	14% (-2)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	70% (-3)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	76%	69%
NEW 2016 Diversity of legal offer is better than illegal	53%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	40% (-6)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	39% (+6)	31% (+9)

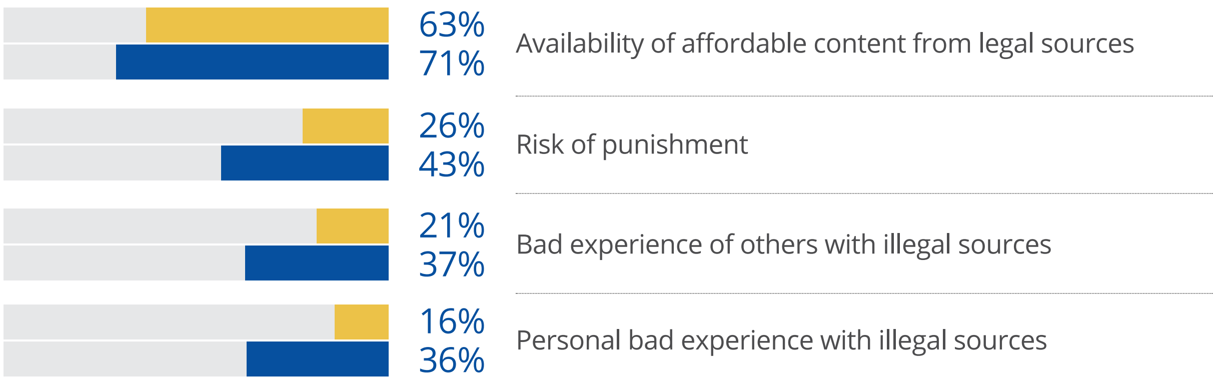
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

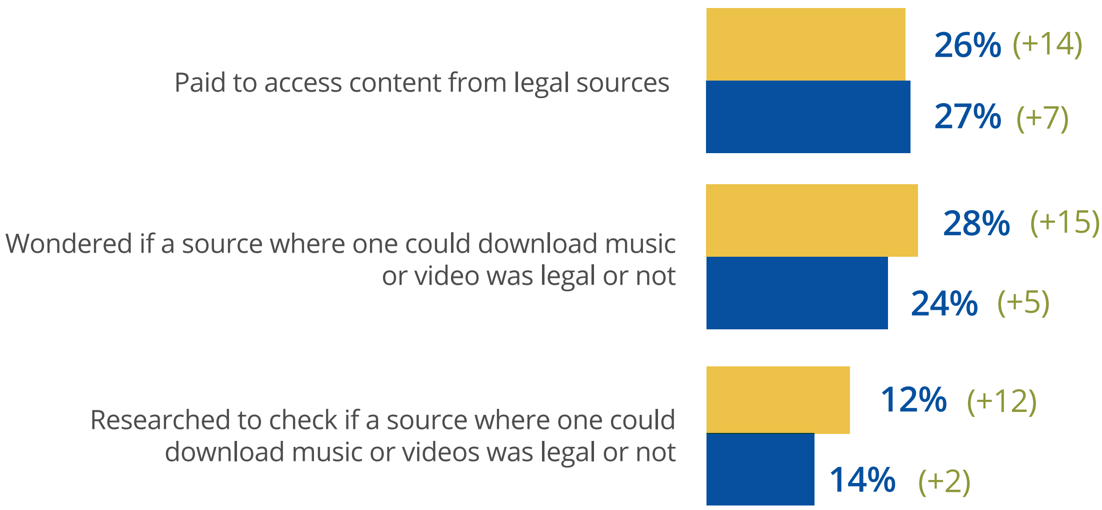
LITHUANIA EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



LUXEMBOURG EU

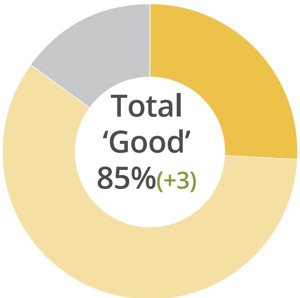
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

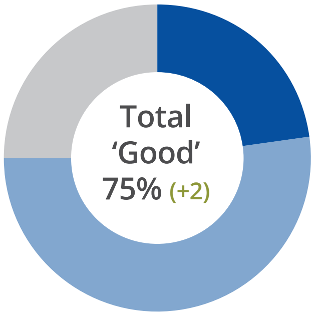
LUXEMBOURG

IP UNDERSTANDING

'Very good' 26% (-4)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	LUXEMBOURG		EU	
Big companies	39%	(+12)	24%	(-1)
Famous performing artists	18%	(-1)	20%	(+3)
Inventors	11%	(-4)	13%	(-4)
Consumers like myself	5%	(-3)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	LUXEMBOURG		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(-1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	88%	(+4)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	90%	(+1)	88%	(+2)

*Numbers reflect "Total 'Agr

LUXEMBOURG EU

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

IP AND INNOVATION*

	Luxembourg		EU	
If there was no longer any IP there would be economic chaos	66%	(-5)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	68%	(-1)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	49%		50%	
NEW 2016 IP principles are not adapted to the Internet	58%		48%	

ILLEGAL BEHAVIOURS

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

	Luxembourg	EU
Bought counterfeit products intentionally	9% (+4)	7% (+3)

		Luxembourg		EU	
Buying counterfeit products*	ruins businesses and jobs	69%	(-6)	78%	(-3)
	supports child labour and illegal trafficking	69%	(-2)	68%	(-3)
	poses a threat to health	62%	(-5)	66%	(-1)
	discourages companies from inventing new products	46%	(-4)	49%	(-4)
It is acceptable when*	the price for the original product is too high	31%	(+5)	27%	(+3)
	the original is not or not yet available where you live	25%	(+4)	24%	(+6)
	the quality of the product does not matter	24%	(+2)	21%	(+4)

LUXEMBOURG EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	LUXEMBOURG	EU
Availability of affordable original products	62%	63%
Personal bad experience with a counterfeit product	32%	41%
Risk of punishment	22%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	20%	28%

RESPONSIBLE BEHAVIOURS

	LUXEMBOURG	EU
Bought counterfeit products as a result of being misled	5% (+2)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	28%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	LUXEMBOURG	EU
Downloaded/streamed from illegal sources	13% (+3)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	89% (+10)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	67%	69%
NEW 2016 Diversity of legal offer is better than illegal	57%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	38% (-3)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	34% (+9)	31% (+9)

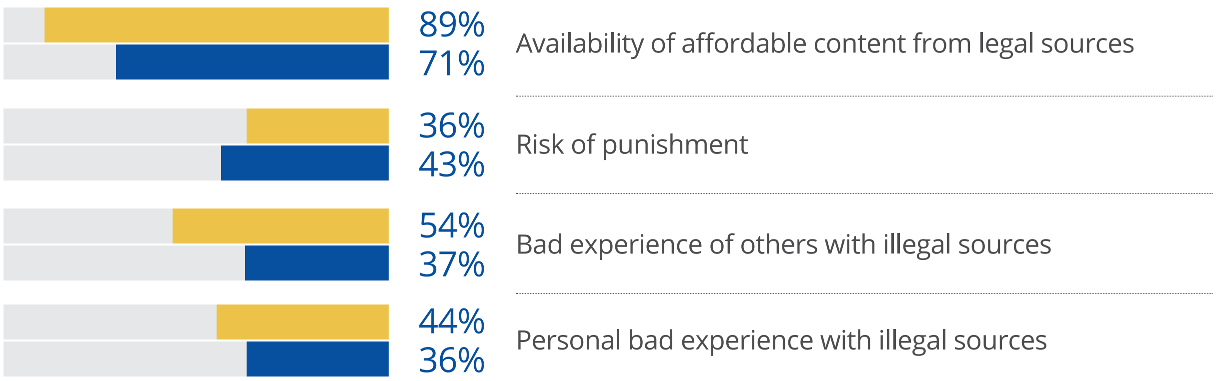
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

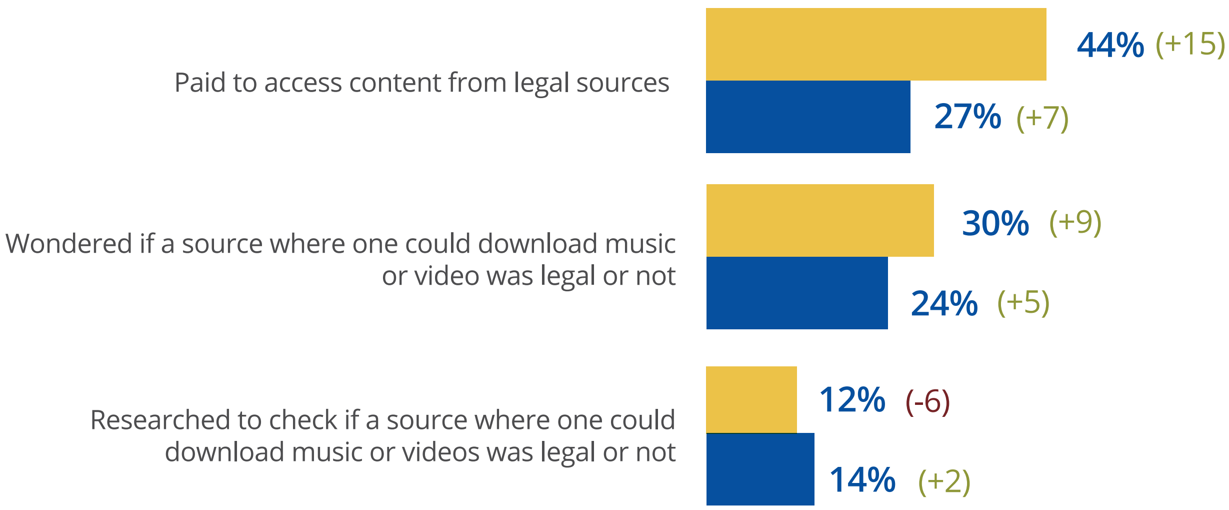
LUXEMBOURG EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS

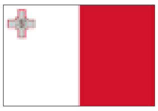


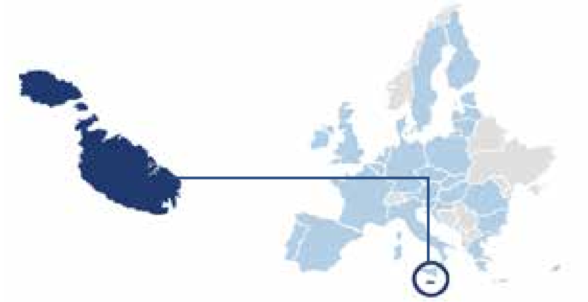
LUXEMBOURG EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

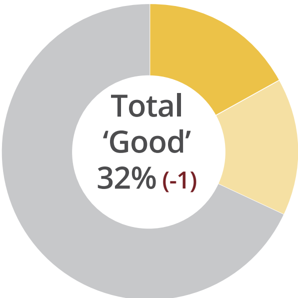
MALTA



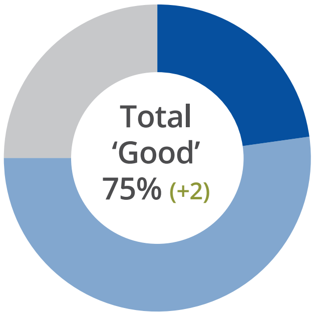


IP UNDERSTANDING

'Very good' 17% (+8)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	MALTA		EU	
Big companies	23%	(-3)	24%	(-1)
Famous performing artists	14%	(+3)	20%	(+3)
Inventors	14%	(-3)	13%	(-4)
Consumers like myself	8%	(-8)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	MALTA		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	94%	(+1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	86%	(+6)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	89%	(+4)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

MALTA EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Malta		EU	
If there was no longer any IP there would be economic chaos	76%	(-2)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	76%	(+4)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	55%		50%	
NEW 2016 IP principles are not adapted to the Internet	36%		48%	

ILLEGAL BEHAVIOURS

	Malta		EU	
Bought counterfeit products intentionally	13%	(+9)	7%	(+3)

Buying counterfeit products*

	Malta		EU	
ruins businesses and jobs	81%	(+1)	78%	(-3)
supports child labour and illegal trafficking	50%	(-14)	68%	(-3)
poses a threat to health	68%	(-1)	66%	(-1)
discourages companies from inventing new products	56%	(-1)	49%	(-4)

It is acceptable when*

	Malta		EU	
the price for the original product is too high	40%	(+5)	27%	(+3)
the original is not or not yet available where you live	39%	(+7)	24%	(+6)
the quality of the product does not matter	34%	(+4)	21%	(+4)

MALTA EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	MALTA	EU
Availability of affordable original products	30%	63%
Personal bad experience with a counterfeit product	23%	41%
Risk of punishment	15%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	6%	28%

RESPONSIBLE BEHAVIOURS

	MALTA	EU
Bought counterfeit products as a result of being misled	11% (+4)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	36%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	MALTA	EU
Downloaded/streamed from illegal sources	9% (-2)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	80% (+5)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	80%	69%
NEW 2016 Diversity of legal offer is better than illegal	77%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	34% (-23)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	29% (+3)	31% (+9)

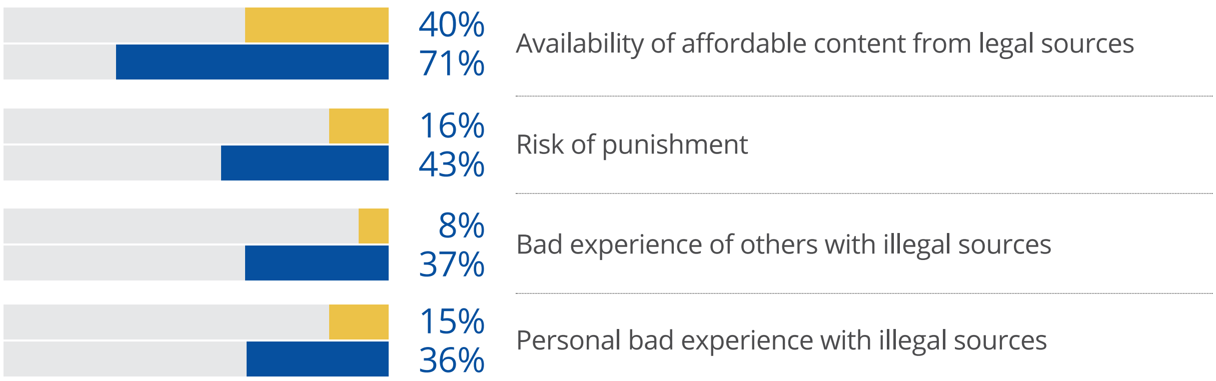
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

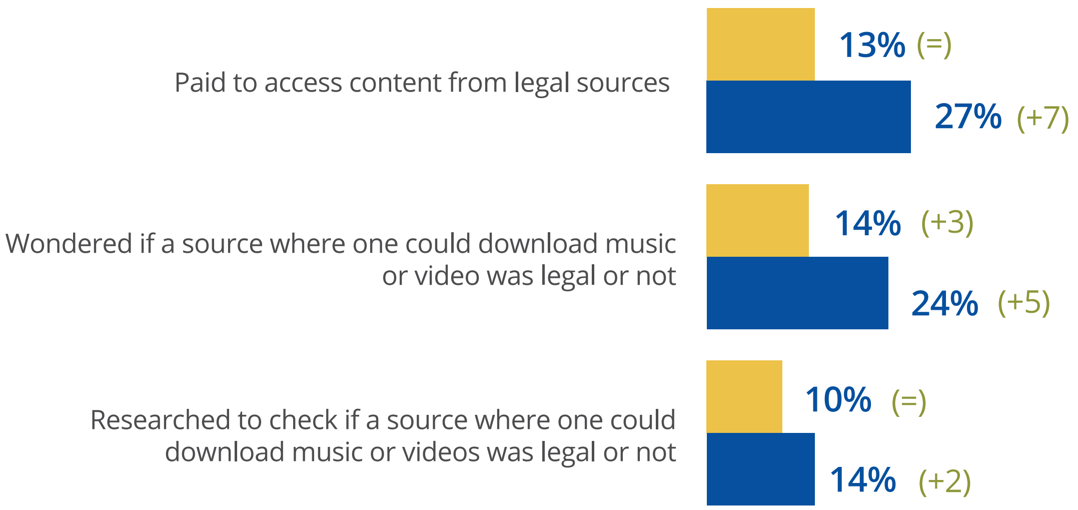
MALTA EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



MALTA EU

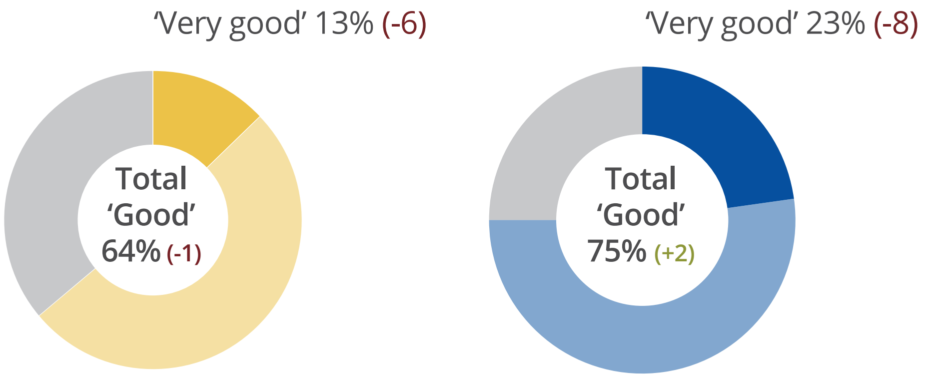
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NETHERLANDS

GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING



THOSE BENEFITING MOST FROM IP (TOP 4)

	Netherlands		EU	
Big companies	39%	(-2)	24%	(-1)
Famous performing artists	16%	(+7)	20%	(+3)
Inventors	7%	(-9)	13%	(-4)
Consumers like myself	4%	(+2)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Netherlands		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(-1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	90%	(=)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	81%	(+1)	88%	(+2)

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Netherlands EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Netherlands		EU	
If there was no longer any IP there would be economic chaos	61%	(+5)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	48%	(-4)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	56%		50%	
NEW 2016 IP principles are not adapted to the Internet	56%		48%	

ILLEGAL BEHAVIOURS

	Netherlands		EU	
Bought counterfeit products intentionally	5%	(+3)	7%	(+3)

Buying counterfeit products*

	Netherlands		EU	
ruins businesses and jobs	76%	(=)	78%	(-3)
supports child labour and illegal trafficking	68%	(-1)	68%	(-3)
poses a threat to health	47	(+1)	66%	(-1)
discourages companies from inventing new products	46%	(+4)	49%	(-4)

It is acceptable when*

	Netherlands		EU	
the price for the original product is too high	34%	(+7)	27%	(+3)
the original is not or not yet available where you live	25%	(+3)	24%	(+6)
the quality of the product does not matter	24%	(=)	21%	(+4)

Netherlands EU *Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

Reason	NetherlandS	EU
Availability of affordable original products	73%	63%
Personal bad experience with a counterfeit product	51%	41%
Risk of punishment	44%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	26%	28%

RESPONSIBLE BEHAVIOURS

	NetherlandS	EU
Bought counterfeit products as a result of being misled	4% (=)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	20%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	NetherlandS	EU
Downloaded/streamed from illegal sources	15% (+1)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	85% (+4)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	59%	69%
NEW 2016 Diversity of legal offer is better than illegal	46%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	46% (-6)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	49% (+15)	31% (+9)

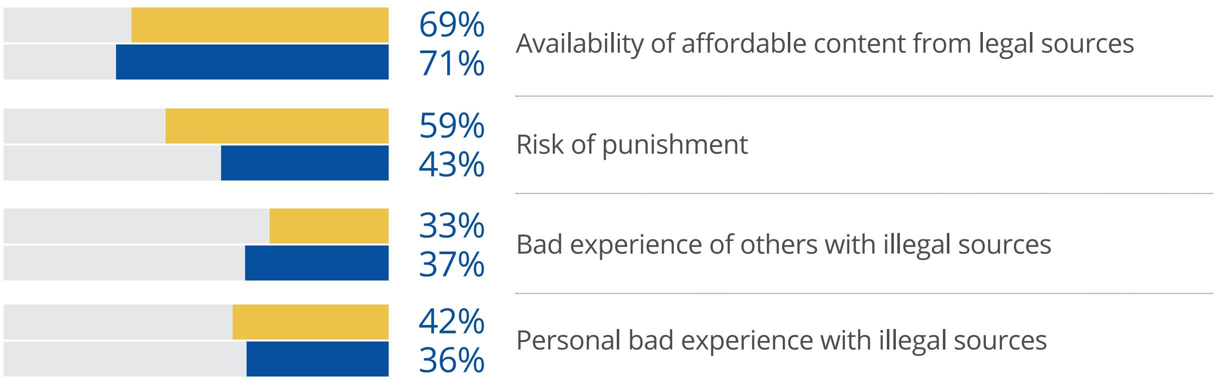
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

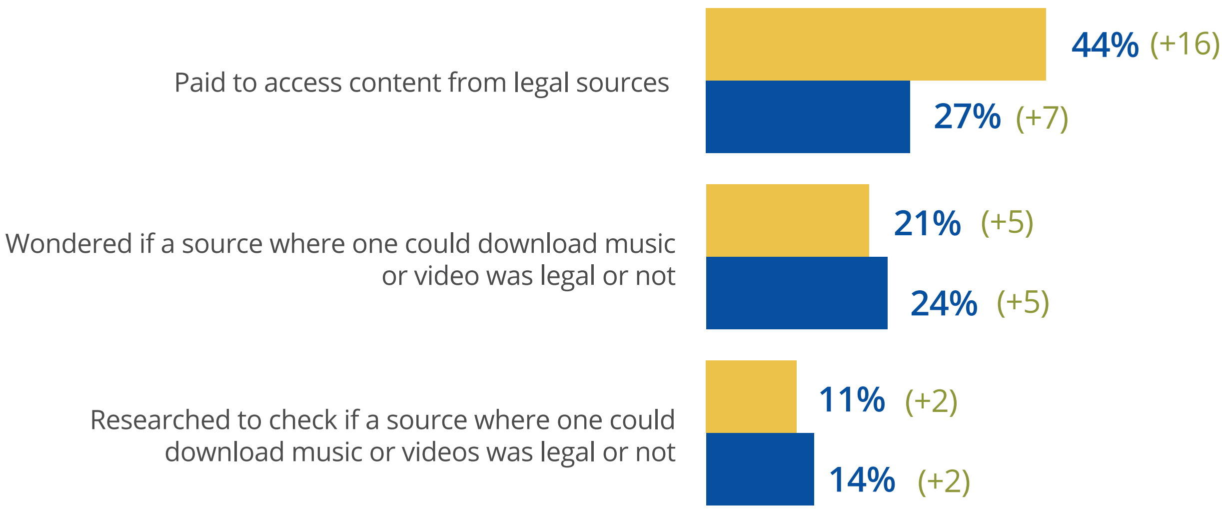
NetherlandS EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



NetherlandS EU

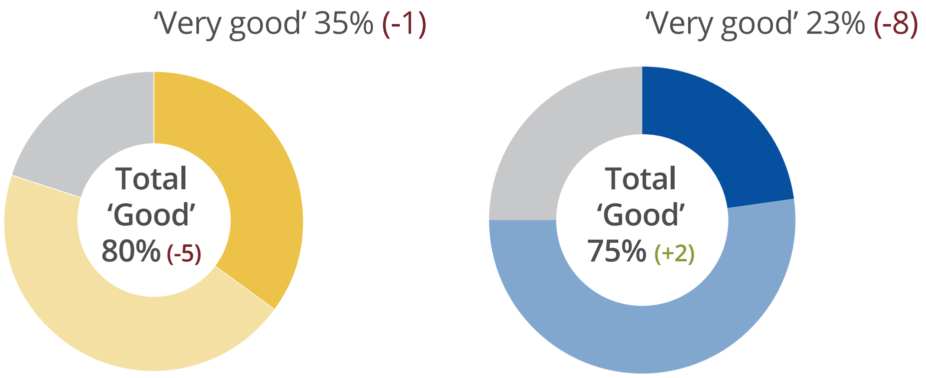
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

POLAND

GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING



THOSE BENEFITING MOST FROM IP (TOP 4)

	Poland		EU	
Big companies	14%	(-3)	24%	(-1)
Famous performing artists	31%	(+1)	20%	(+3)
Inventors	15%	(-3)	13%	(-4)
Consumers like myself	3%	(-1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Poland		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(+1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	90%	(+2)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	90%	(+2)	88%	(+2)

*Numbers reflect "Total 'Agree'"
Poland EU
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

IP AND INNOVATION*

	Poland		EU	
If there was no longer any IP there would be economic chaos	69%	(-1)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	71%	(=)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	53%		50%	
NEW 2016 IP principles are not adapted to the Internet	52%		48%	

ILLEGAL BEHAVIOURS

Bought counterfeit products intentionally		
Poland	9%	(+6)
EU	7%	(+3)

		Poland		EU	
Buying counterfeit products*	ruins businesses and jobs	67%	(-5)	78%	(-3)
	supports child labour and illegal trafficking	51%	(-7)	68%	(-3)
	poses a threat to health	59%	(-6)	66%	(-1)
	discourages companies from inventing new products	43%	(-8)	49%	(-4)
It is acceptable when*	the price for the original product is too high	35%	(+10)	27%	(+3)
	the original is not or not yet available where you live	28%	(+9)	24%	(+6)
	the quality of the product does not matter	27%	(+9)	21%	(+4)

Poland EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Poland	EU
Availability of affordable original products	75%	63%
Personal bad experience with a counterfeit product	30%	41%
Risk of punishment	27%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	20%	28%

RESPONSIBLE BEHAVIOURS

	Poland	EU
Bought counterfeit products as a result of being misled	16% (+5)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	48%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Poland	EU
Downloaded/streamed from illegal sources	7% (-3)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	87% (+1)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	70%	69%
NEW 2016 Diversity of legal offer is better than illegal	46%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	61% (+21)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	34% (+15)	31% (+9)

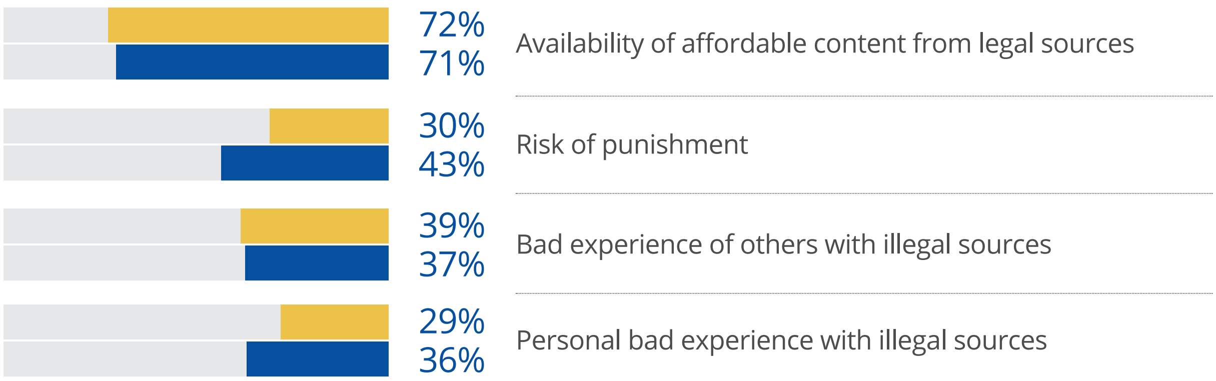
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

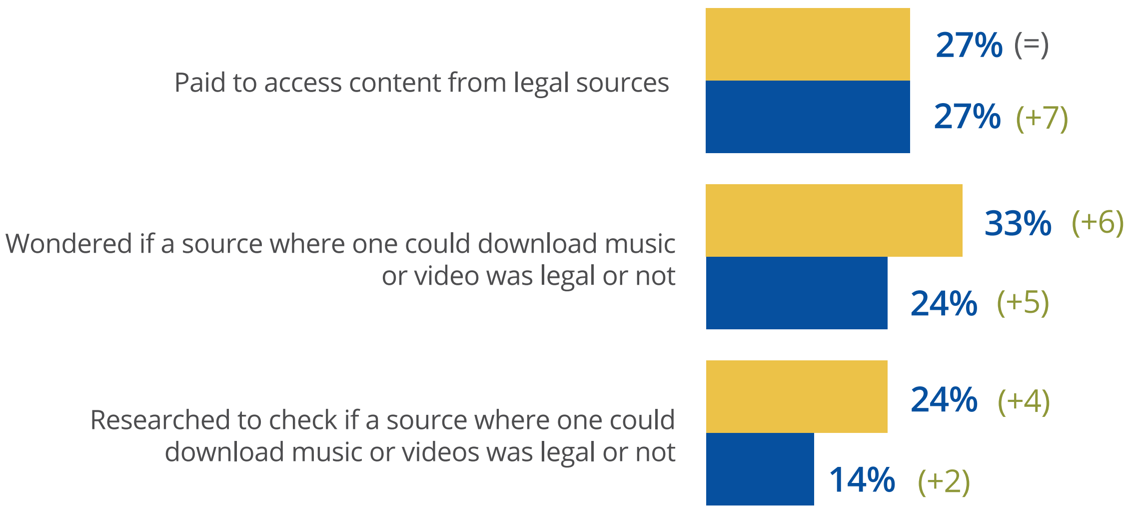
Poland EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



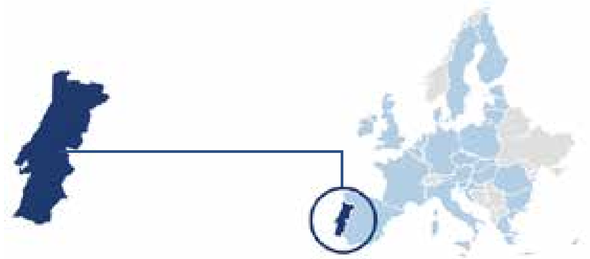
RESPONSIBLE BEHAVIOURS



Poland EU *Numbers reflect "Total 'Agree'"

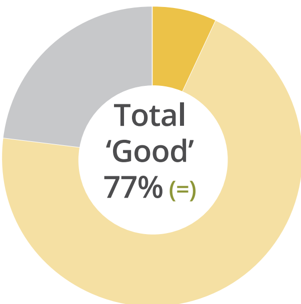
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

PORTUGAL

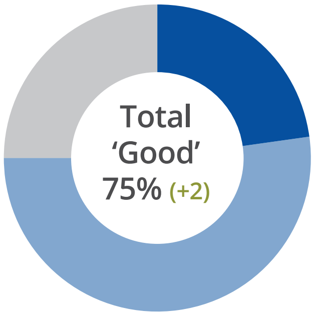


IP UNDERSTANDING

'Very good' 7% (-1)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Portugal		EU	
Big companies	21%	(-2)	24%	(-1)
Famous performing artists	15%	(+2)	20%	(+3)
Inventors	11%	(-2)	13%	(-4)
Consumers like myself	7%	(=)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Portugal		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(=)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	85%	(+4)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	91%	(=)	88%	(+2)

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Portugal EU

IP AND INNOVATION*

	Portugal		EU	
If there was no longer any IP there would be economic chaos	71%	(-4)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	72%	(-5)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	59%		50%	
NEW 2016 IP principles are not adapted to the Internet	53%		48%	

ILLEGAL BEHAVIOURS

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

	Portugal		EU	
Bought counterfeit products intentionally	10%	(+5)	7%	(+3)

Buying counterfeit products*

	Portugal		EU	
ruins businesses and jobs	77%	(+4)	78%	(-3)
supports child labour and illegal trafficking	66%	(=)	68%	(-3)
poses a threat to health	50%	(-6)	66%	(-1)
discourages companies from inventing new products	60%	(-2)	49%	(-4)

It is acceptable when*

	Portugal		EU	
the price for the original product is too high	34%	(+3)	27%	(+3)
the original is not or not yet available where you live	37%	(+9)	24%	(+6)
the quality of the product does not matter	24%	(+3)	21%	(+4)

Portugal EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

69%	63%	Availability of affordable original products
47%	41%	Personal bad experience with a counterfeit product
42%	33%	Risk of punishment
46%	28%	A better understanding of the harm caused by my behaviour on jobs and on the EU economy

RESPONSIBLE BEHAVIOURS

Bought counterfeit products as a result of being misled	8% (+3)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	31%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

Downloaded/streamed from illegal sources	7% (-6)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	79% (-2)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	75%	69%
NEW 2016 Diversity of legal offer is better than illegal	67%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	31% (-13)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	36% (+6)	31% (+9)

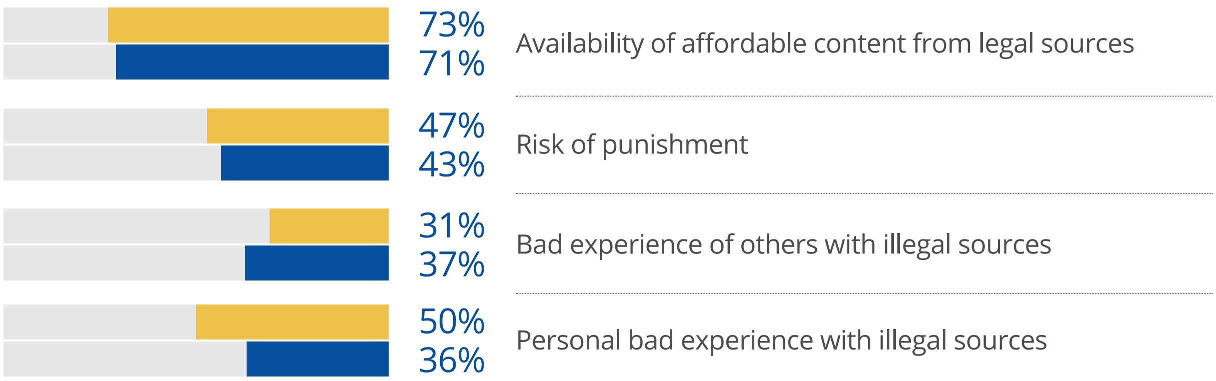
*Numbers reflect "Total 'Agree'"

Portugal

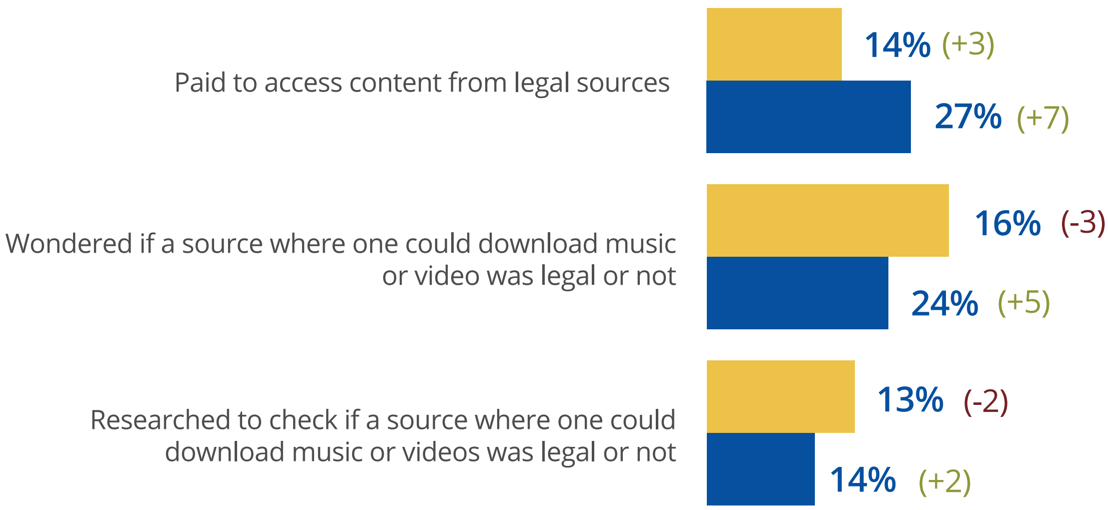
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



Portugal

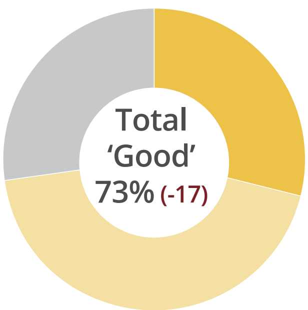
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

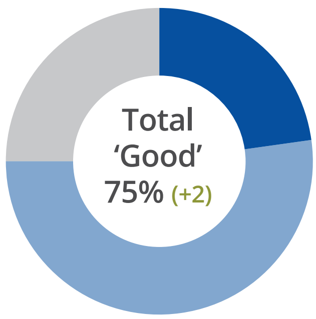
ROMANIA

IP UNDERSTANDING

'Very good' 29% (-11)



'Very good' 23% (-8)



THOSE BENEFITING MOST FROM IP (TOP 4)

	Romania		EU	
Big companies	16%	(+2)	24%	(-1)
Famous performing artists	24%	(+2)	20%	(+3)
Inventors	15%	(-9)	13%	(-4)
Consumers like myself	5%	(-1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Romania		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(-1)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	83%	(-4)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	91%	(-1)	88%	(+2)

*Numbers reflect "Total 'Agree'"

Romania EU

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Romania		EU	
If there was no longer any IP there would be economic chaos	83%	(-1)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	81%	(-3)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	54%		50%	
NEW 2016 IP principles are not adapted to the Internet	52%		48%	

ILLEGAL BEHAVIOURS

	Romania		EU	
Bought counterfeit products intentionally	13%	(+6)	7%	(+3)
Buying counterfeit products*				
ruins businesses and jobs	64%	(-7)	78%	(-3)
supports child labour and illegal trafficking	48%	(-7)	68%	(-3)
poses a threat to health	73%	(-4)	66%	(-1)
discourages companies from inventing new products	53%	(-14)	49%	(-4)
It is acceptable when*				
the price for the original product is too high	26%	(+3)	27%	(+3)
the original is not or not yet available where you live	25%	(+2)	24%	(+6)
the quality of the product does not matter	17%	(=)	21%	(+4)

Romania EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

Reason	Romania	EU
Availability of affordable original products	52%	63%
Personal bad experience with a counterfeit product	31%	41%
Risk of punishment	23%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	21%	28%

RESPONSIBLE BEHAVIOURS

	Romania	EU
Bought counterfeit products as a result of being misled	39% (+16)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	75%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Romania	EU
Downloaded/streamed from illegal sources	5% (-3)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	77% (-1)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	75%	69%
NEW 2016 Diversity of legal offer is better than illegal	68%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	25% (-11)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	30% (+9)	31% (+9)

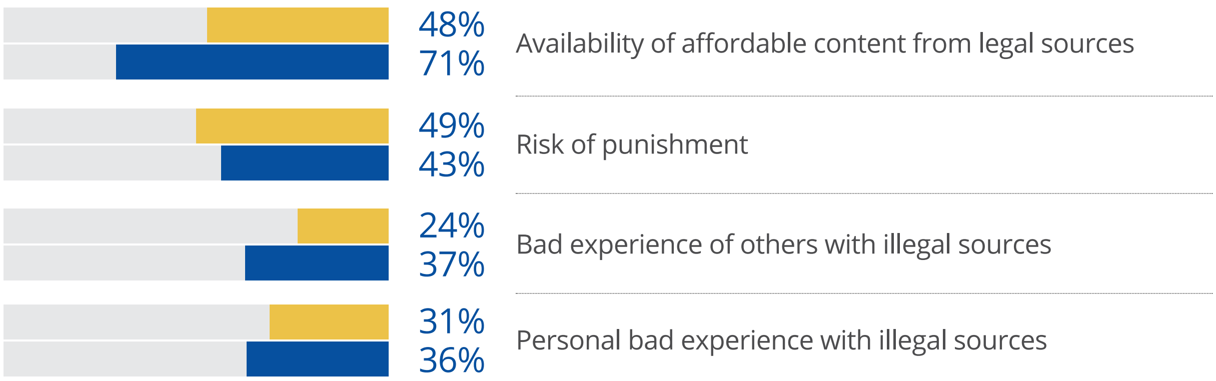
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

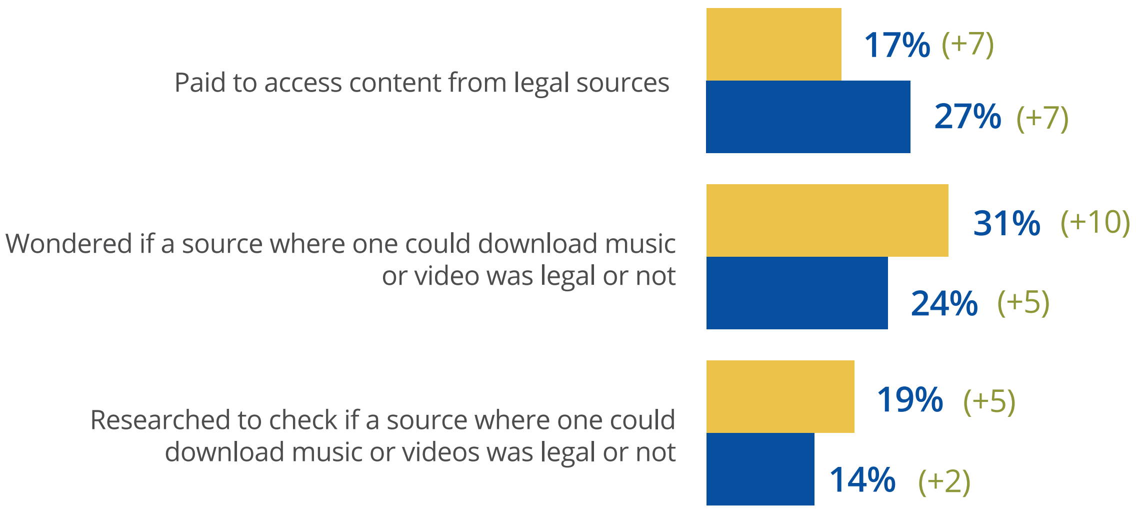
Romania EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



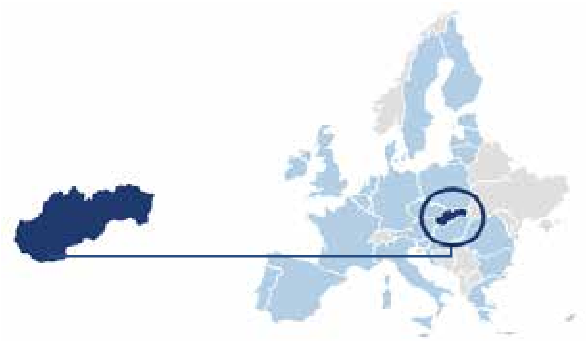
RESPONSIBLE BEHAVIOURS



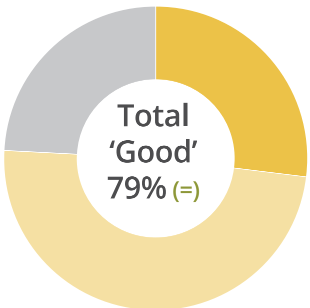
Romania EU *Numbers reflect "Total 'Agree'"

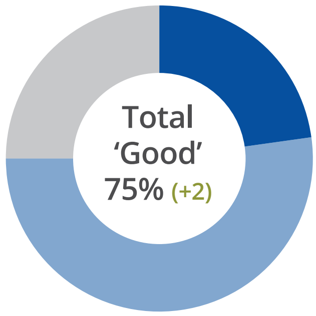
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

SLOVAKIA



IP UNDERSTANDING





THOSE BENEFITING MOST FROM IP (TOP 4)

	Slovakia		EU	
Big companies	16%	(=)	24%	(-1)
Famous performing artists	22%	(+4)	20%	(+3)
Inventors	13%	(-4)	13%	(-4)
Consumers like myself	7%	(+1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Slovakia		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	93%	(+2)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	81%	(=)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	85%	(+2)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Slovakia EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Statement	Slovakia		EU	
	If there was no longer any IP there would be economic chaos	56%	(-2)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	60%	(-7)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	53%		50%	
NEW 2016	IP principles are not adapted to the Internet	47%		48%	

ILLEGAL BEHAVIOURS

	Slovakia		EU	
Bought counterfeit products intentionally	10%	(+8)	7%	(+3)

Buying counterfeit products*

Statement	Slovakia		EU	
ruins businesses and jobs	68%	(-3)	78%	(-3)
supports child labour and illegal trafficking	60%	(-3)	68%	(-3)
poses a threat to health	71%	(-1)	66%	(-1)
discourages companies from inventing new products	46%	(-10)	49%	(-4)

It is acceptable when*

Statement	Slovakia		EU	
the price for the original product is too high	36%	(+9)	27%	(+3)
the original is not or not yet available where you live	34%	(+12)	24%	(+6)
the quality of the product does not matter	32%	(+11)	21%	(+4)

Slovakia EU *Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Slovakia	EU
Availability of affordable original products	58%	63%
Personal bad experience with a counterfeit product	25%	41%
Risk of punishment	10%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	12%	28%

RESPONSIBLE BEHAVIOURS

	Slovakia	EU
Bought counterfeit products as a result of being misled	22% (+13)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	49%	35%

ILLEGAL BEHAVIOURS

	Slovakia	EU
Downloaded/streamed from illegal sources	8% (-3)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	71% (=)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	61%	69%
NEW 2016 Diversity of legal offer is better than illegal	47%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	52% (-6)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	42% (+10)	31% (+9)

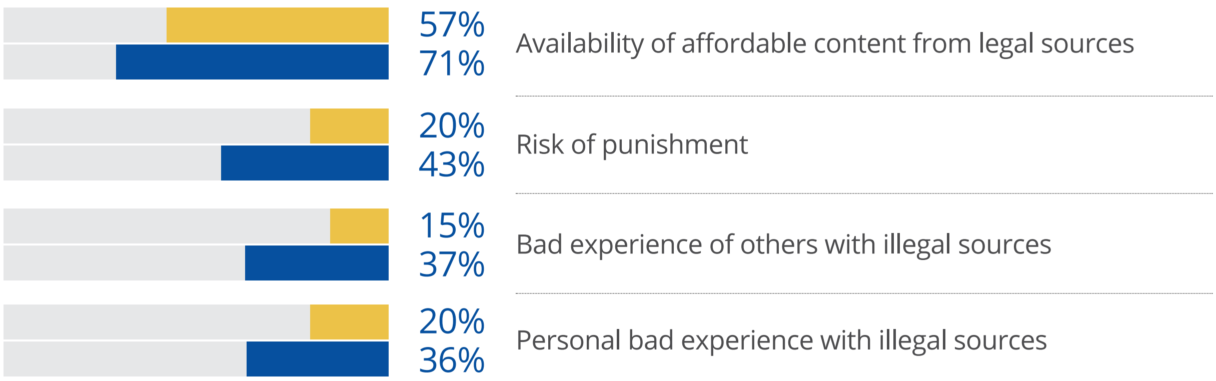
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

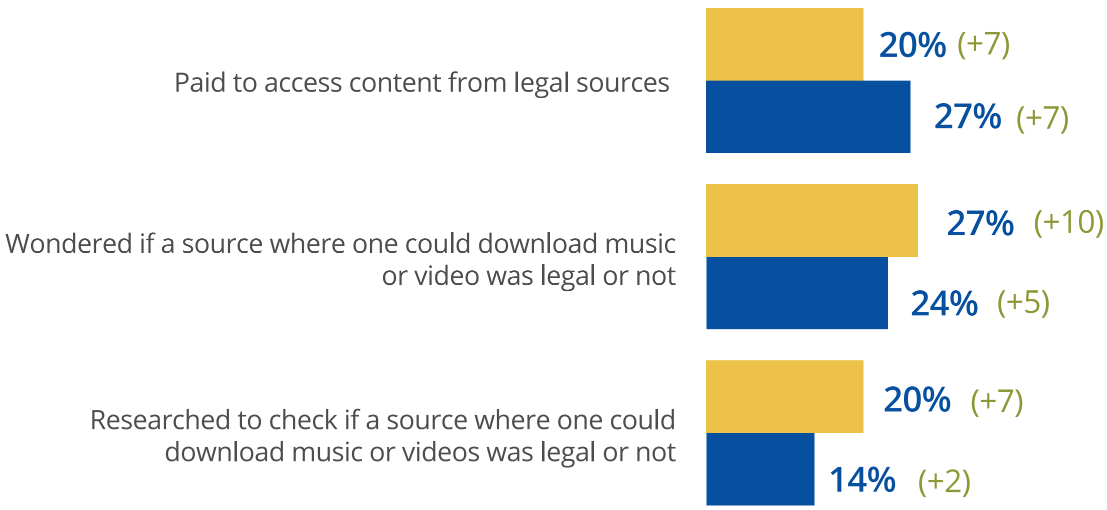
Slovakia EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



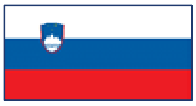
RESPONSIBLE BEHAVIOURS



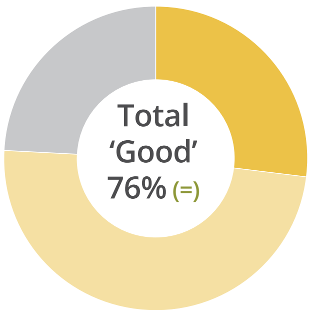
Slovakia EU *Numbers reflect "Total 'Agree'"

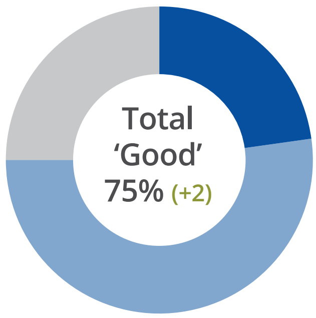
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

SLOVENIA



IP UNDERSTANDING





THOSE BENEFITING MOST FROM IP (TOP 4)

	slovenia		EU	
Big companies	28%	(+3)	24%	(-1)
Famous performing artists	14%	(+5)	20%	(+3)
Inventors	12%	(-12)	13%	(-4)
Consumers like myself	3%	(-2)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	slovenia		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	97%	(=)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	88%	(+2)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	88%	(-2)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

slovenia EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

		Slovenia		EU	
	If there was no longer any IP there would be economic chaos	66%	(-4)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	68%	(-7)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	55%		50%	
NEW 2016	IP principles are not adapted to the Internet	52%		48%	

ILLEGAL BEHAVIOURS

	Slovenia		EU	
Bought counterfeit products intentionally	17%	(+12)	7%	(+3)

Buying counterfeit products*

	Slovenia		EU	
ruins businesses and jobs	77%	(-4)	78%	(-3)
supports child labour and illegal trafficking	70%	(-3)	68%	(-3)
poses a threat to health	77%	(+3)	66%	(-1)
discourages companies from inventing new products	54%	(-3)	49%	(-4)

It is acceptable when*

	Slovenia		EU	
the price for the original product is too high	41%	(+4)	27%	(+3)
the original is not or not yet available where you live	42%	(+1)	24%	(+6)
the quality of the product does not matter	35%	(+4)	21%	(+4)

slovenia EU *Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

NEW 2016

TOP REASONS TO STOP BUYING FAKES

Reason	Slovenia	EU
Availability of affordable original products	61%	63%
Personal bad experience with a counterfeit product	19%	41%
Risk of punishment	14%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	6%	28%

RESPONSIBLE BEHAVIOURS

	Slovenia	EU
Bought counterfeit products as a result of being misled	13% (+6)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	42%	35%

ILLEGAL BEHAVIOURS

	Slovenia	EU
Downloaded/streamed from illegal sources	20% (+3)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	68% (-2)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	55%	69%
NEW 2016 Diversity of legal offer is better than illegal	40%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	55% (=)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	41% (+7)	31% (+9)

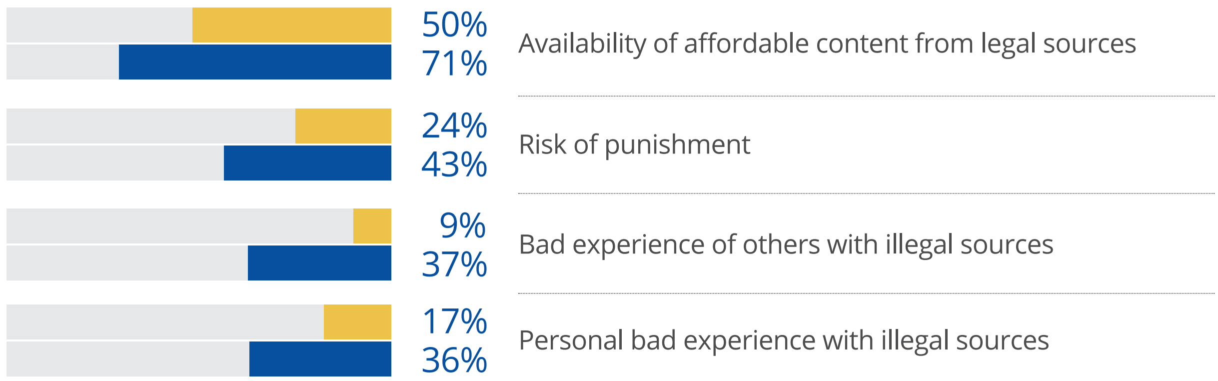
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

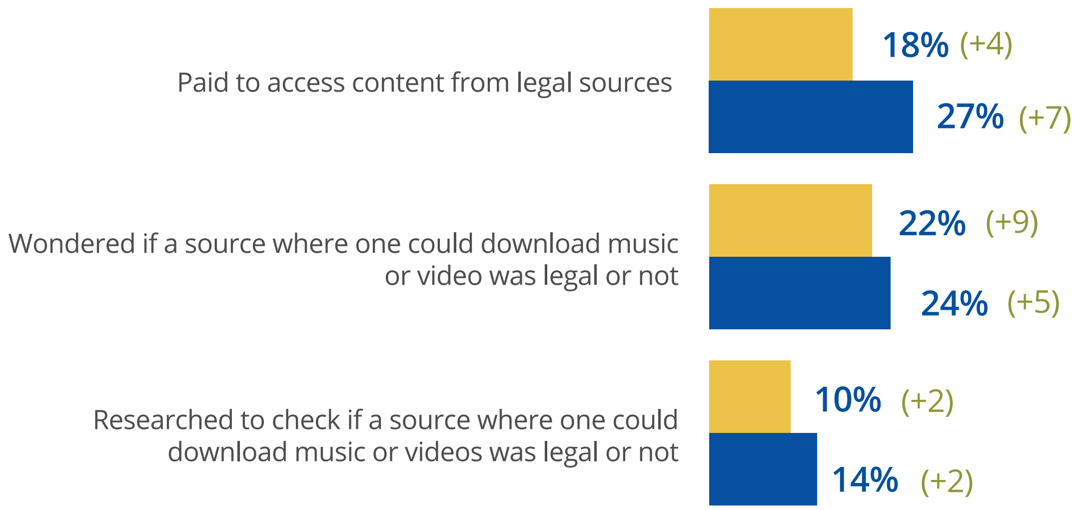
Slovenia EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



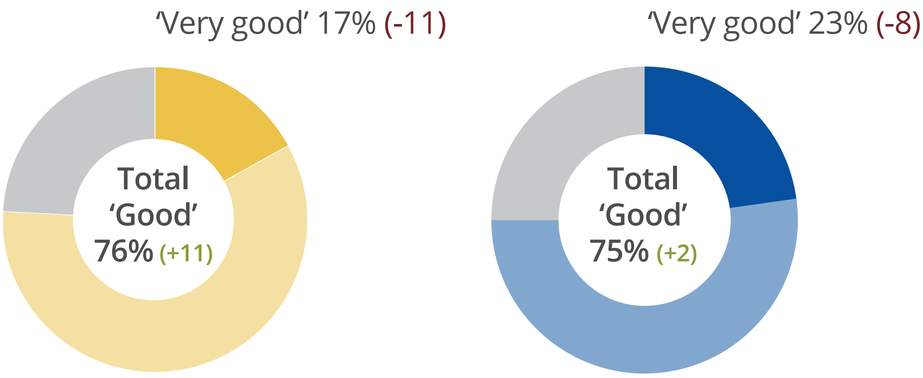
RESPONSIBLE BEHAVIOURS



Slovenia EU *Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

SPAIN

IP UNDERSTANDING



THOSE BENEFITING MOST FROM IP (TOP 4)

	Spain		EU	
Big companies	37%	(-4)	24%	(-1)
Famous performing artists	18%	(+2)	20%	(+3)
Inventors	6%	(-3)	13%	(-4)
Consumers like myself	4%	(+1)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Spain		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	96%	(+2)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	87%	(+5)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	89%	(+8)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Spain EU

IP AND INNOVATION*

		Spain		EU	
	If there was no longer any IP there would be economic chaos	61%	(+4)	67%	(=)
	Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	62%	(+4)	67%	(-1)
NEW 2016	Strict protection of Intellectual Property may curb innovation	55%		50%	
NEW 2016	IP principles are not adapted to the Internet	58%		48%	

ILLEGAL BEHAVIOURS

	Spain		EU	
Bought counterfeit products intentionally	11%	(+3)	7%	(+3)

		Spain		EU	
Buying counterfeit products*	ruins businesses and jobs	75%	(-5)	78%	(-3)
	supports child labour and illegal trafficking	55%	(-7)	68%	(-3)
	poses a threat to health	58%	(-3)	66%	(-1)
	discourages companies from inventing new products	55%	(-7)	49%	(-4)
It is acceptable when*	the price for the original product is too high	31%	(-3)	27%	(+3)
	the original is not or not yet available where you live	23%	(+2)	24%	(+6)
	the quality of the product does not matter	21%	(+2)	21%	(+4)

Spain EU *Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	Spain	EU
Availability of affordable original products	70%	63%
Personal bad experience with a counterfeit product	55%	41%
Risk of punishment	41%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	46%	28%

RESPONSIBLE BEHAVIOURS

	Spain	EU
Bought counterfeit products as a result of being misled	9% (+5)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	34%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Spain	EU
Downloaded/streamed from illegal sources	16% (-1)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	87% (+1)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	78%	69%
NEW 2016 Diversity of legal offer is better than illegal	67%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	42% (-16)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	39% (+4)	31% (+9)

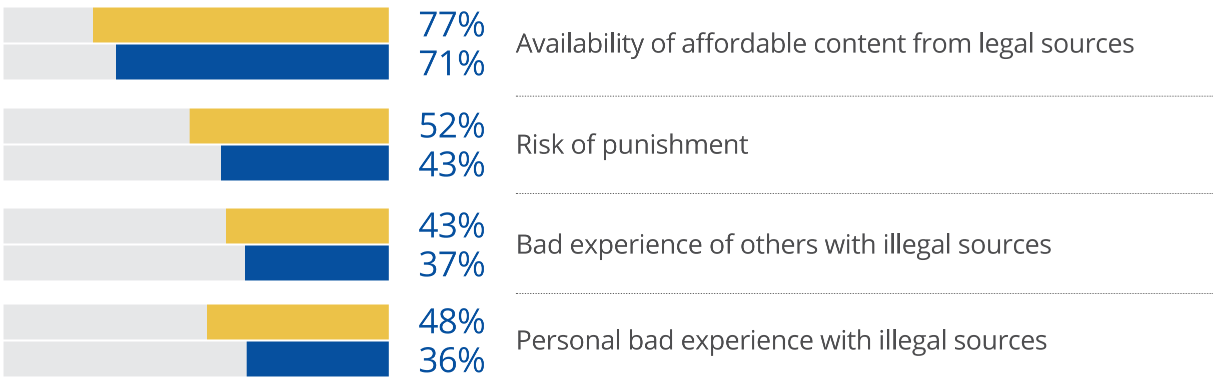
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

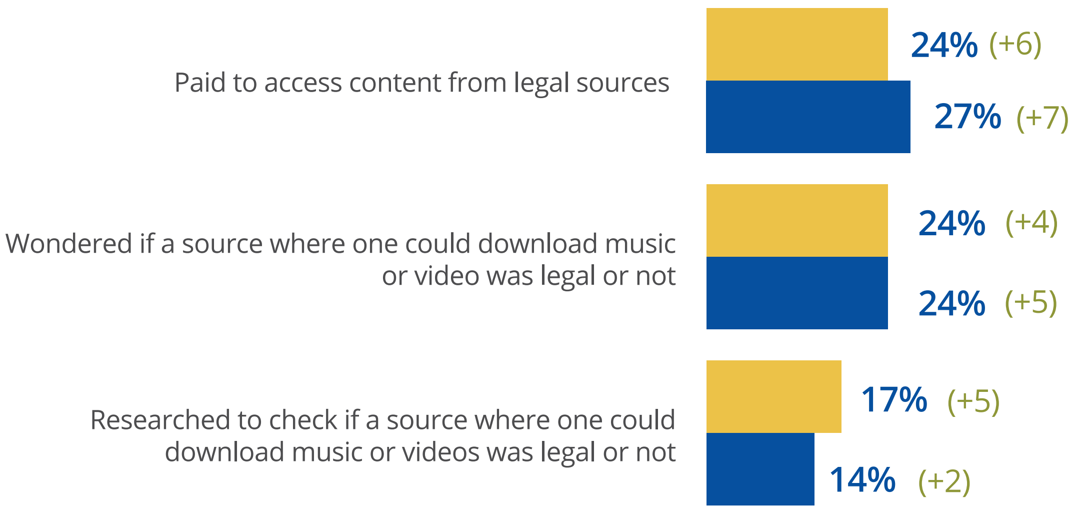
Spain EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



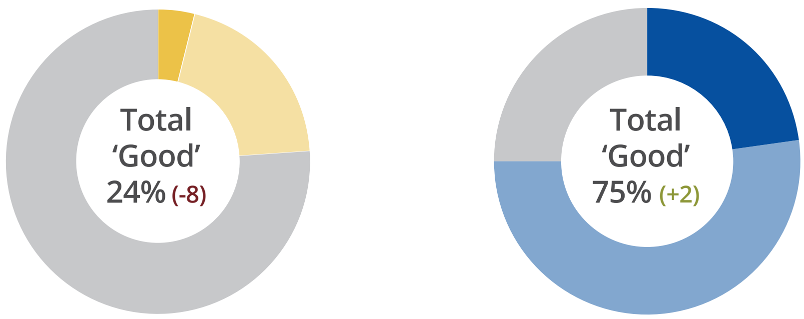
Spain EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

SWEDEN

IP UNDERSTANDING



THOSE BENEFITING MOST FROM IP (TOP 4)

	Sweden		EU	
Big companies	20%	(-5)	24%	(-1)
Famous performing artists	14%	(+4)	20%	(+3)
Inventors	12%	(+2)	13%	(-4)
Consumers like myself	2%	(-2)	5%	(+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	Sweden		EU	
inventors, creators and performing artists can protect their rights and be paid for their work	99%	(+3)	97%	(+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	93%	(+9)	89%	(+3)
it contributes to improving and guaranteeing the quality of products and services	88%	(+3)	88%	(+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Sweden | EU

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

IP AND INNOVATION*

	Sweden		EU	
If there was no longer any IP there would be economic chaos	55%	(+2)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	64%	(-1)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	53%		50%	
NEW 2016 IP principles are not adapted to the Internet	56%		48%	

ILLEGAL BEHAVIOURS

	Sweden	EU
Bought counterfeit products intentionally	6% (+2)	7% (+3)

Buying counterfeit products*

	Sweden		EU	
ruins businesses and jobs	77%	(+3)	78%	(-3)
supports child labour and illegal trafficking	74%	(+9)	68%	(-3)
poses a threat to health	58%	(+5)	66%	(-1)
discourages companies from inventing new products	67%	(-1)	49%	(-4)

It is acceptable when*

	Sweden		EU	
the price for the original product is too high	27%	(+6)	27%	(+3)
the original is not or not yet available where you live	32%	(+8)	24%	(+6)
the quality of the product does not matter	26%	(+5)	21%	(+4)

Sweden   EU

*Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

Sweden	EU	
54%	63%	Availability of affordable original products
35%	41%	Personal bad experience with a counterfeit product
45%	33%	Risk of punishment
18%	28%	A better understanding of the harm caused by my behaviour on jobs and on the EU economy

RESPONSIBLE BEHAVIOURS

	Sweden	EU
Bought counterfeit products as a result of being misled	4% (+2)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	17%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	Sweden	EU
Downloaded/streamed from illegal sources	13% (-1)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	86% (+2)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	62%	69%
NEW 2016 Diversity of legal offer is better than illegal	42%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	29% (-11)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	25% (+4)	31% (+9)

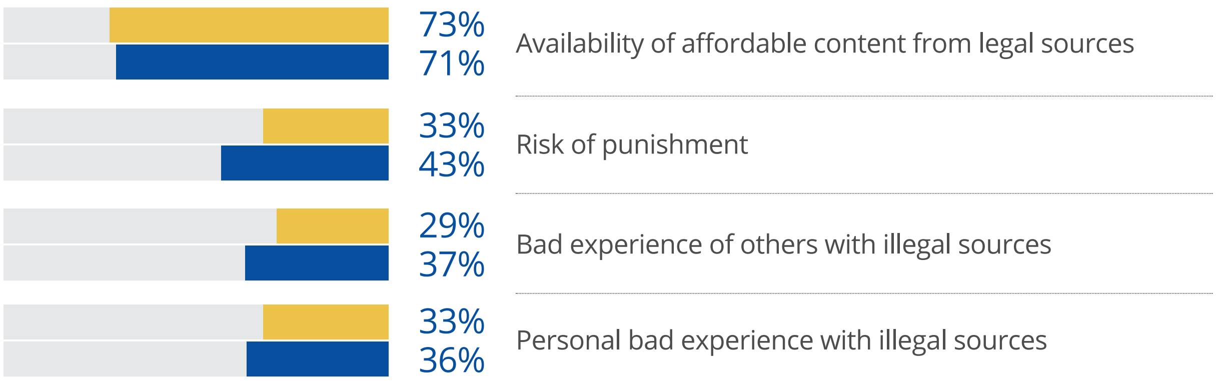
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

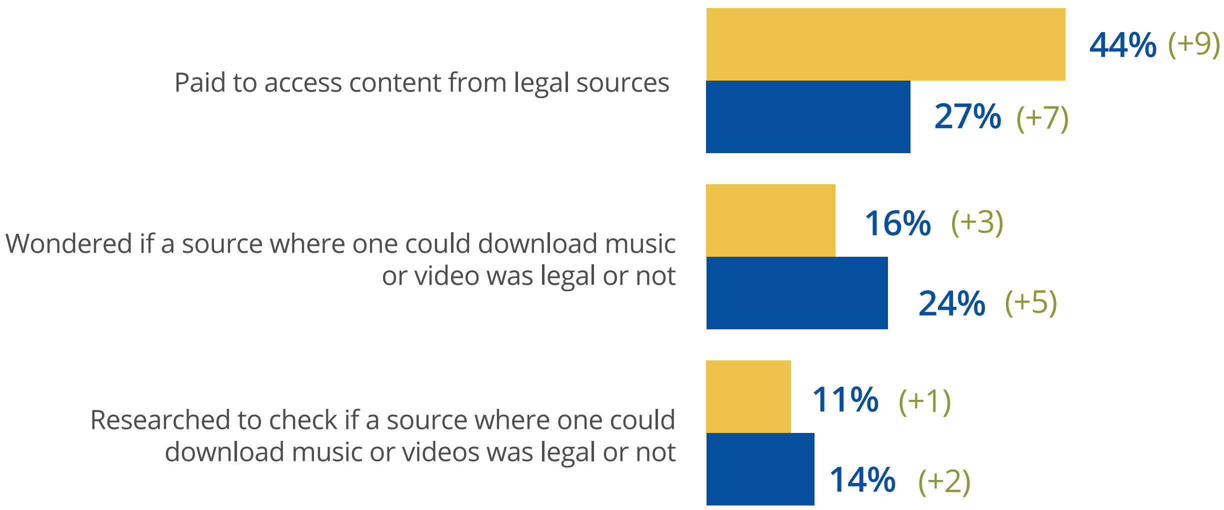
Sweden EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS

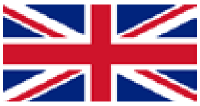


Sweden EU

*Numbers reflect "Total 'Agree'"

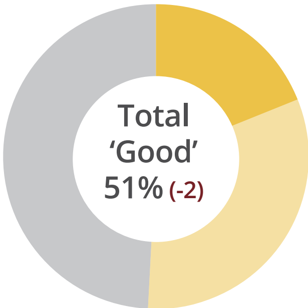
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

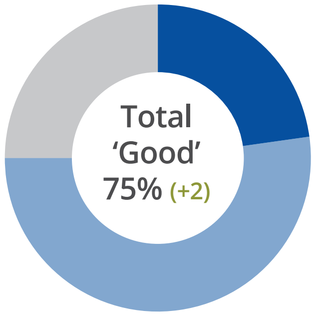
UK



GENERAL PERCEPTIONS OF IP

IP UNDERSTANDING





THOSE BENEFITING MOST FROM IP (TOP 4)

	UK	EU
Big companies	22% (-2)	24% (-1)
Famous performing artists	13% (-1)	20% (+3)
Inventors	17% (+1)	13% (-4)
Consumers like myself	4% (-2)	5% (+1)

IMPORTANCE OF IP PROTECTION*

Protecting IP is important because...

	UK	EU
inventors, creators and performing artists can protect their rights and be paid for their work	97% (+2)	97% (+1)
no one can claim that they are the creator of a piece of art or the inventor of something when in reality this is not the case	87% (+6)	89% (+3)
it contributes to improving and guaranteeing the quality of products and services	87% (+3)	88% (+2)

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

UK EU

IP AND INNOVATION*

	UK		EU	
If there was no longer any IP there would be economic chaos	65%	(+1)	67%	(=)
Companies that create a lot of IP contribute significantly more to the creation of jobs or growth	57%	(-3)	67%	(-1)
NEW 2016 Strict protection of Intellectual Property may curb innovation	50%		50%	
NEW 2016 IP principles are not adapted to the Internet	49%		48%	

ILLEGAL BEHAVIOURS

	UK		EU	
Bought counterfeit products intentionally	5%	(+2)	7%	(+3)

Buying counterfeit products*

	UK		EU	
ruins businesses and jobs	79%	(=)	78%	(-3)
supports child labour and illegal trafficking	66%	(=)	68%	(-3)
poses a threat to health	67%	(+9)	66%	(-1)
discourages companies from inventing new products	52%	(+2)	49%	(-4)

It is acceptable when*

	UK		EU	
the price for the original product is too high	25%	(+6)	27%	(+3)
the original is not or not yet available where you live	19%	(+5)	24%	(+6)
the quality of the product does not matter	18%	(+5)	21%	(+4)

UK EU *Numbers reflect "Total 'Agree'"
(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

BUYING COUNTERFEIT PRODUCTS: BEHAVIOURS & PERCEPTIONS

NEW 2016

TOP REASONS TO STOP BUYING FAKES

	UK	EU
Availability of affordable original products	68%	63%
Personal bad experience with a counterfeit product	38%	41%
Risk of punishment	41%	33%
A better understanding of the harm caused by my behaviour on jobs and on the EU economy	29%	28%

RESPONSIBLE BEHAVIOURS

	UK	EU
Bought counterfeit products as a result of being misled	11% (+7)	10% (+4)
NEW 2016 Wondered whether a product bought was genuine or counterfeit	26%	35%

COPYRIGHT-PROTECTED ONLINE CONTENT: BEHAVIOURS & PERCEPTIONS

ILLEGAL BEHAVIOURS

	UK	EU
Downloaded/streamed from illegal sources	8% (+3)	10% (+1)
Whenever there is an affordable legal option I prefer to access/download/stream content through authorised platforms	82% (+1)	83% (+3)
NEW 2016 Quality of legal offer is better than illegal	73%	69%
NEW 2016 Diversity of legal offer is better than illegal	59%	54%
It is acceptable to obtain content illegally from the Internet when it is for my personal use	20% (-17)	35% (-7)
It is acceptable to obtain content illegally from the Internet when there is no immediately available legal alternative	22% (+5)	31% (+9)

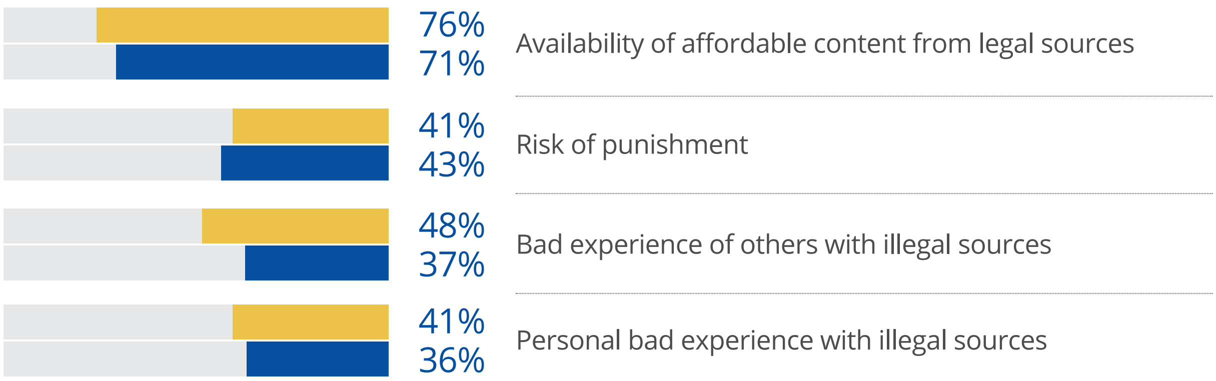
*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

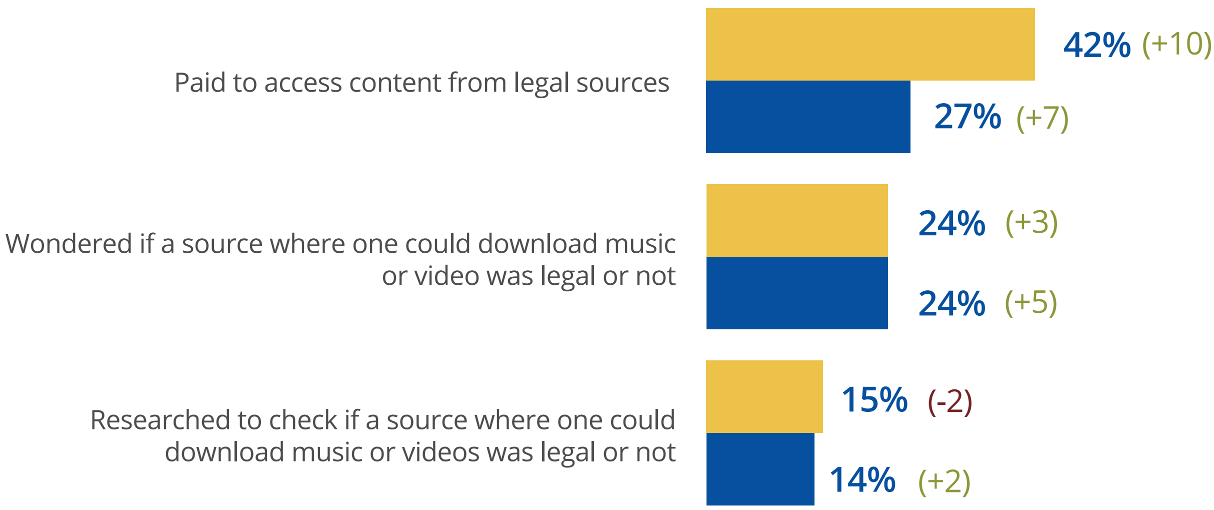
UK EU

NEW 2016

TOP 4 REASONS TO STOP USING ILLEGAL SOURCES



RESPONSIBLE BEHAVIOURS



UK EU

*Numbers reflect "Total 'Agree'"

(+xx), (-xx), (= xx) evolutions comparing to 2013 survey

Avenida de Europa, 4,
E-03008 - Alicante
Spain

www.euipo.europa.eu

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