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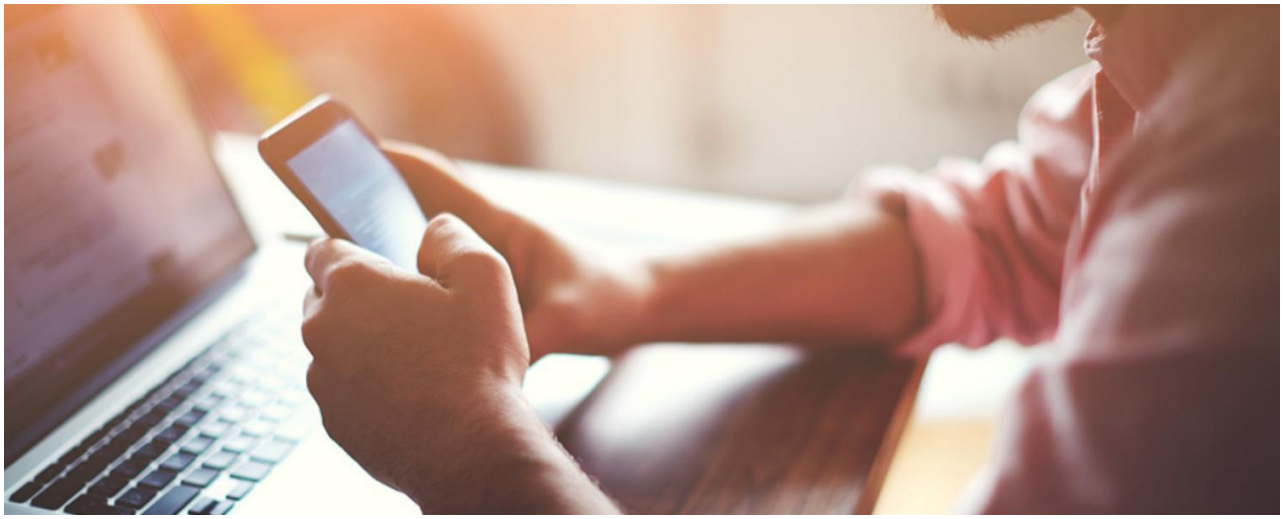
2019 Intellectual Property and Youth Scoreboard



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2019 Intellectual Property and Youth Scoreboard

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Foreword

2019 Intellectual Property and Youth Scoreboard

Building on the first IP Youth Scoreboard, published three years ago, this updated 2019 online survey covers young people (age 15-24) in the 28 EU Member States and highlights their attitudes and behaviours connected to digital content, physical goods and communication issues related to IP rights.

While the latest results show many findings that are similar to the picture in 2016, it includes some interesting indications of possible change.

The quality and legality of goods and services are taking on greater importance in this important demographic, and arguments related to the moral aspect of infringing IP rights, as well as safety concerns, have more weight.

For example, young people increasingly think counterfeit goods are 'not cool' and are concerned that the 'artists/creators and the team behind them may be harmed'.

While a third of young people have accessed illegal downloads, this is a decrease of 5 percentage points since 2016. Changes in the market, with greater access to, and use of, subscription-based services for music or films appear to be playing a role here.

On the other hand there has been a slight increase in the purchase of counterfeit goods among young people, sometimes by accident. A significant minority of young people doesn't see a difference between real and fake products and simply don't care if they are fake.

One of the keys to changing attitudes and behaviours is to first understand what drives young people when deciding where to source online digital content or physical goods, when they are faced with the alternatives of respecting or ignoring the associated IP rights.

In this context, the Intellectual Property and Youth Scoreboard will be a valuable resource for parents, educators, IP rights stakeholders and all those concerned with the future management of IP rights and the encouragement of the social and economic benefits that they underpin.

Christian Archambeau
Executive Director
EUIPO

1. Executive Summary

2019 Intellectual Property and Youth Scoreboard

1.1 SUMMARY OF KEY FINDINGS

This study follows the first edition of the Intellectual Property and Youth Scoreboard (2016). The specific aim of the research is to understand which drivers and barriers are the strongest when acquiring online digital content or purchasing physical goods that are offered legally and illegally. The 2019 study is based on repeating the same online survey of 2016 among young people (aged 15-24) in the 28 EU Member States (EU28), to highlight the similarities and differences between then and now. This executive summary, which accompanies the report, summarises the key findings and specific results in the three domains of digital content, physical goods, and communication.

The most noticeable aspect of the 2019 Intellectual Property and Youth Scoreboard is that many of the results are very similar to those found in 2016. However, there are also some interesting early indications of a possible change in the attitudes and behaviour of young Europeans, and this report highlights the notable similarities and changes since the first edition. It remains to be seen whether these small shifts are indicative or not of a real change in the behaviour and attitudes of young people. The demographic-based differences of young people in the EU28 and the significant differences between countries have also been taken into account.

Quality matters, cost is also a main factor but has declined in importance

Young people care about quality when it comes to shopping online for digital content or physical goods. Furthermore, they are concerned about making purchases in a safe online environment. While cost/price is ranked as an important consideration, this driver is not as strong as it was in 2016. Affordability arguments are ranked highest among the reasons to stop engaging in IP infringing behaviour, but fewer young people in 2019 agree that this is a primary reason to stop.

Legality appears to be resonating slightly more with young people

When it comes to young people and intellectual property infringement, there is a big difference between buying fake products and accessing digital content from illegal sources, as was the case in 2016. Only one in five had bought counterfeit goods whereas twice this figure had accessed digital content from illegal sources. An indicative finding of the 2019 Youth IP Scoreboard is that there has been **a slight decrease (4 percentage points) in the proportion of young people who have intentionally accessed digital content through illegal sources** and an increase in the proportion who have intentionally not used illegal sources (11 percentage points). This shift is **not reflected in young people's propensity to buy fake goods**, although this behaviour is far less common than accessing digital content through illegal sources.

Young people in 2019 consider the legality of online sources for digital content and physical goods. The percentage of young people who stress the importance of an item being original rather than fake has slightly risen, as has the percentage who say that online content offered legally is also important. There has been a slight decline in the percentage of young people saying that they bought fake goods because they did not care whether they were genuine or fake and, similarly, in the proportion of those who accessed digital content via illegal sources because they did not know otherwise, or because they did not see anything wrong with doing so.

Most young people across Europe say they perform at least one check to verify whether a source is legal or illegal (when purchasing physical goods or accessing digital content). Indeed, the figure has marginally

increased since 2016 (82 % in 2016 mentioned performing at least one check compared to 87 % in 2019), indicating that young people are checking the legality of their sources slightly more often. The most common check performed, by quite a margin, is searching the internet for reviews, comments or opinions (58 %). The next most common is checking the site owner (31 %), then asking friends (26 %), and asking parents or relatives (19 %). Just over half (55 %) of young people say they are capable of identifying illegal sources of digital content. While fewer — 39 % — feel able to identify illegal sources of *physical* goods, both figures represent a small improvement on the results for 2016, with 4 and 3 percentage points respectively.

Together, these small shifts indicate that there may be an increasing willingness among young people to make checks, which can be encouraged further.

The market has changed

The idea of subscription-based business models for digital content appears to have gained traction, with a 9 percentage point increase in those saying that paying a subscription to access all content is important. Furthermore, the patterns in what young people are accessing have shifted significantly since 2016, with a 17 percentage point decrease in the number of young people saying they used illegal sources to access music and a 7 percentage point decrease in the number saying they used illegal sources to access films. The reasons for using illegal sources are less likely to be about the lack of a need to register and access content by item. Together, these findings suggest that the trend towards subscription service legal offers, at least in some markets, may be influencing young people's online behaviour towards these legal offers and subsequently reducing the attraction of illegal offers.

Young people think twice if they sense a risk to their personal safety, but are increasingly convinced by moral arguments

Young people are sensitive to the risks to themselves if they choose to engage in behaviour that infringes the IP of others online. The risk of their credit card details being stolen or their computer/device being infected by viruses/malware are the biggest reasons for young people to think twice about purchasing digital content from illegal sources or counterfeit goods. Nevertheless, it is some of the more 'moral' arguments that have become more convincing for young people. Young people increasingly think counterfeit goods are 'not cool' and are concerned that the 'artists/creators and the team behind them may be harmed'.

1.2 DIGITAL CONTENT

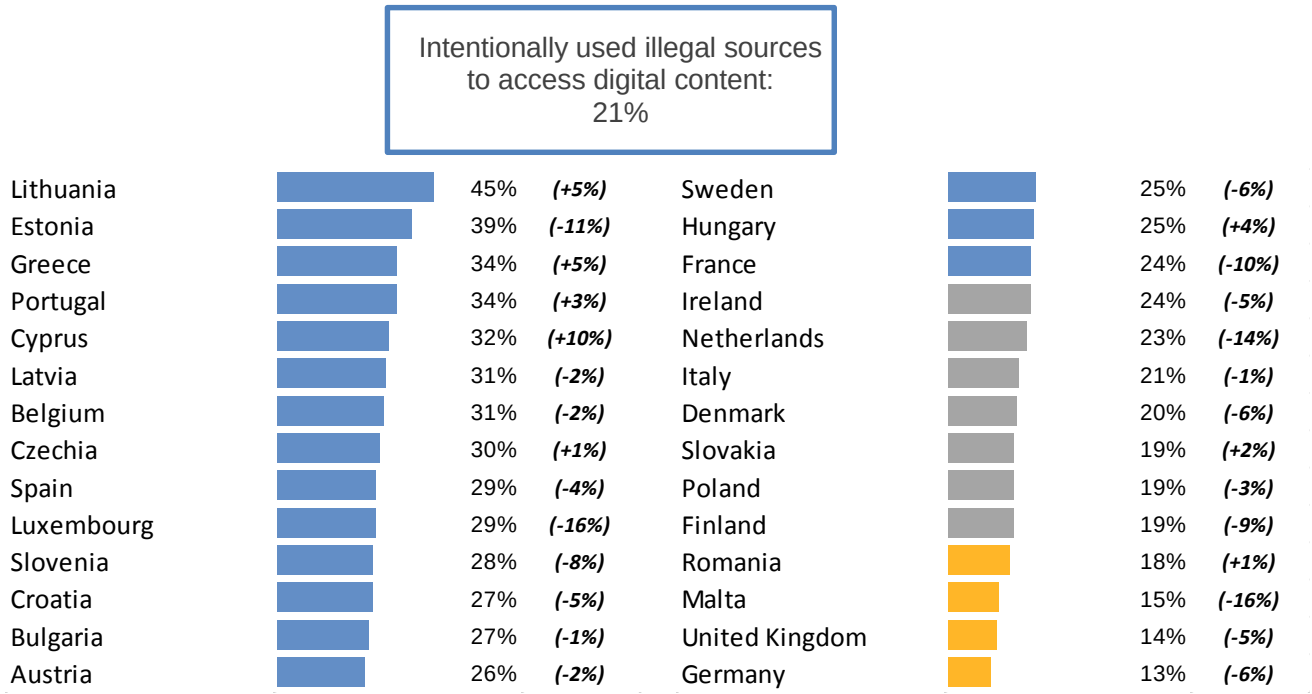
As was the case in 2016, music remains the most popular digital content accessed by young people. Indeed, almost all (97 %) stream or download music and more than nine in ten stream or download films/series (94 %) and games (92 %). Around eight in ten stream or download educational content (82 %) and TV shows or sport (79 %). The proportions accessing e-newspapers and magazines, and e-books remain somewhat lower, at 59 % and 56 % respectively.

The quality and safety of the online offer are more important than price to young people when making a choice of digital content. Both price and quality have decreased in importance since 2016, whereas the legality of sources has become more important — with the increase most noticeable in Finland. Furthermore, young people are more likely to say that being able to pay a subscription fee is an important factor.

A third of young people have accessed illegal sources, but this has decreased by 5 percentage points since 2016. Therefore, there has been an increase in the proportion who have *not* used illegal sources.

When it comes to accessing illegal sources for digital content, one-third of young people has accessed illegal sources, 21 % intentionally and 12 % *un*intentionally. This is lower than in 2016. Furthermore, there has been a corresponding increase in the proportion saying they have *not* accessed illegal sources, and a decrease in the proportion saying they are unsure. More generally, it is rare for young people to rely exclusively on illegal sources — 80 % of the sample use legal sources to access digital content. Overall, the degree to which young people are accessing illegal sources for digital content has not seen a dramatic shift, however there have been increases in some countries (e.g. in Cyprus) and decreases in others (e.g. the Netherlands, Luxembourg and Malta). With one exception, every country has seen a decrease in the percentage who are unsure as to whether sources are illegal or otherwise.

Figure 1.1: Proportion of young people who intentionally accessed digital content from illegal sources per country



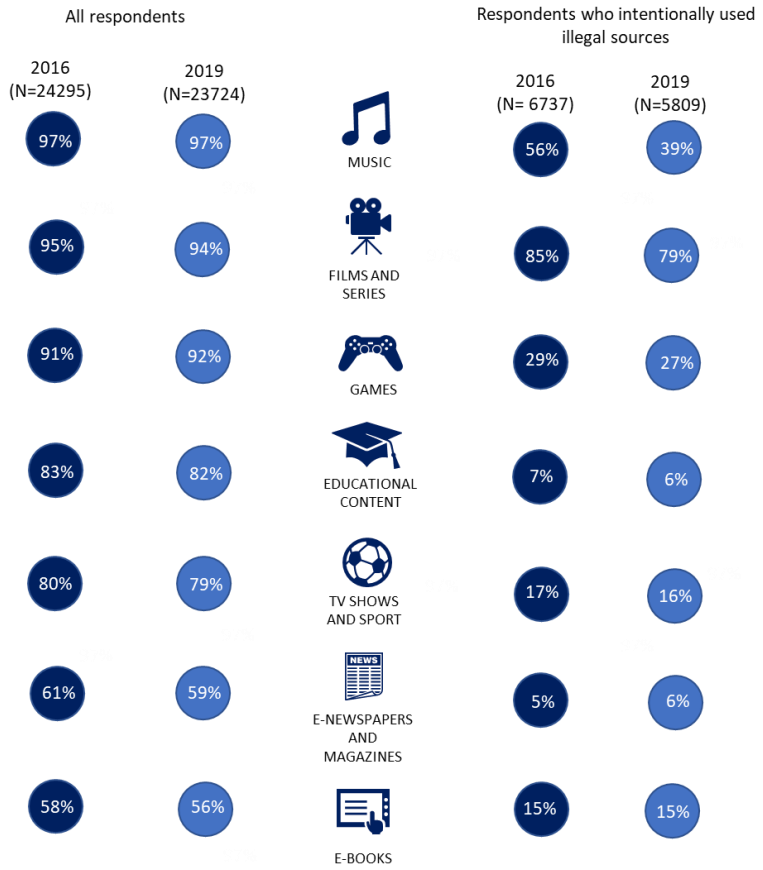
Young people who use illegal sources intentionally to access digital content do so primarily to access films and series. There has been a notable decrease in those using illegal sources to access music — whereas almost all young people download or stream music online, only 39 % of those intentionally using illegal sources do so to access music — a decline of 17 percentage points since 2016.

The main reason that young people use illegal sources intentionally is due to price, with over half (56 %) mentioning this, but other reasons include the lack of a legal offer (30 %) and the perception that a larger choice of content is available illegally (26 %). Price as a driver has decreased by almost 10 percentage points since 2016.

There are almost always reasons that would stop young people from using illegal sources to access digital content. Primarily these relate to having a more affordable offer (55 %), followed by a risk of punishment (35 %), and a bad personal experience (29 %).

The specific type of illegal content that young people access intentionally continues to show a limited correlation with more general digital consumption patterns. Thus, whereas a majority of all respondents digitally consume films/series, games, educational content, TV shows, sport, e-newspapers/magazines, and e-books, those accessing illegal sources intentionally are predominantly doing so to download or stream films and series.

Figure 1.2: Use of digital content in general and intentional use of content from illegal sources ([1])



Nonetheless, reflecting the aggregate decline in intentional use of illegal digital sources, the proportions of young people accessing illegal sources of music or films and series intentionally are appreciably lower than in 2016 — by 17 and 6 percentage points respectively.

([1]) Source: Question II3.1: How often have you listened to, watched, read, used, played, downloaded, streamed the following content from the internet during the past 12 months? (N=23724) and IV4: Which type of content did you use, play, download or stream intentionally from a legal source (website)? Please indicate all that apply (N=5809).

1.3 PHYSICAL GOODS

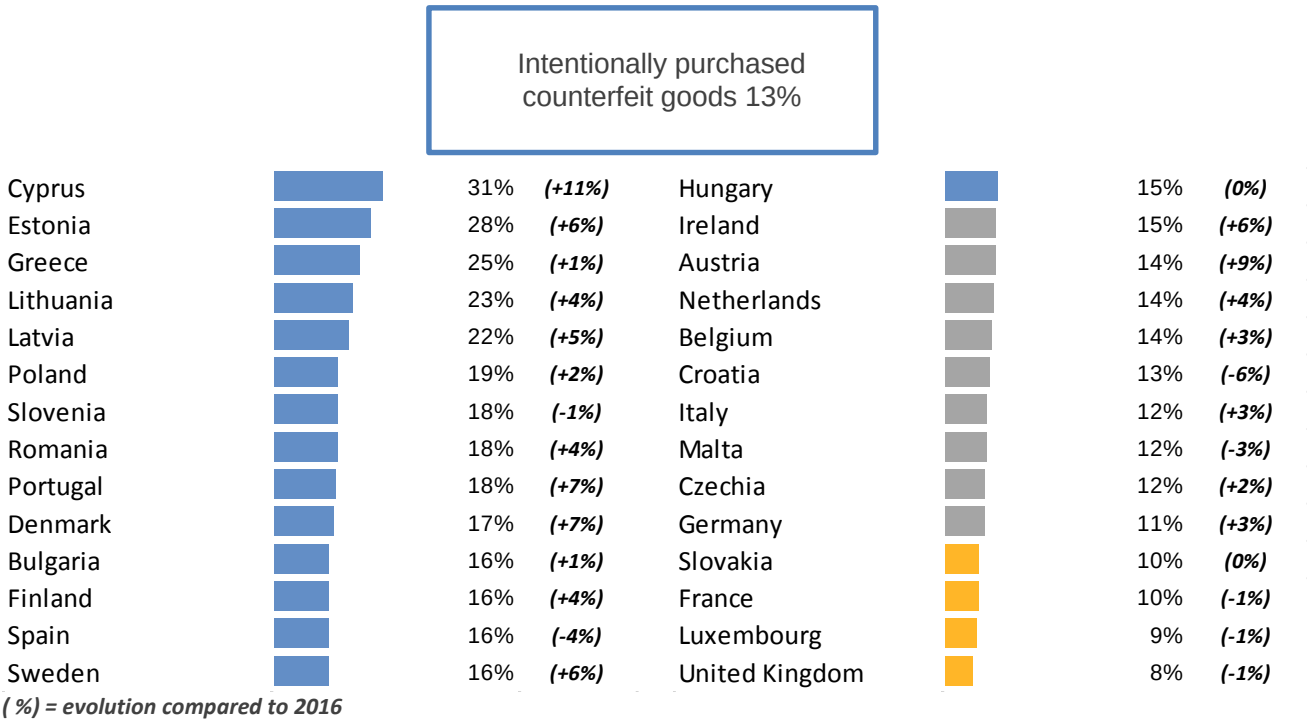
The overwhelming majority of young Europeans — 94 % — have bought products online in the last 12 months. This is almost identical to the finding for 2016. Clothes, accessories and footwear remain the most popular categories of goods that young people buy online. In terms of other categories, young people are less commonly purchasing music and films (physical product versions) online in comparison to 2016.

As is the case for digital content, the key factor that young people consider when purchasing products online is the quality of the product (62 %) and the safety of payment methods (61 %). However, another factor, the safety of the site, has increased in importance since 2016, by 7 percentage points.

There has been a slight (3 percentage points) increase in the purchase of counterfeit goods among young people, from 22 % to 25 % since 2016.

A quarter of young people have bought counterfeit physical goods online — 13 % intentionally and 12 % unintentionally. Overall, there has been a small (3 percentage points) increase in the purchase of counterfeit goods since 2016. This increase has been more noticeable in countries such as Austria and Cyprus than in others — indeed, Croatia has seen a decrease in the percentage buying counterfeit goods. Across Europe, one in ten respondents are unsure as to whether or not they have bought counterfeit physical goods; an almost identical proportion to that recorded in 2016.

Figure 1.3: Proportion of young people who intentionally purchased counterfeit goods per country



(%) = evolution compared to 2016

The most commonly purchased counterfeit goods continue to be clothes and accessories, and footwear. Other categories, including electronic devices, tickets, books and magazines are purchased comparatively infrequently. These results show no significant change to 2016.

Price again plays a key role in the intentional purchase of counterfeit goods. Furthermore, a significant minority of young people do not see the difference between real and fake products and do not care if they are fake. While this rank ordering of factors reflects that of 2016, there has been a decrease in the proportion citing price.

Fewer than one in ten of those who have bought counterfeit physical goods intentionally say that nothing would stop them from doing this again. Again, a more affordable offer of original products, a bad experience or the risk of punishment would stop young people from buying counterfeit products, as was the case in 2016.

1.4 COMMUNICATION

Messages about personal safety and risk still resonate strongly among young people, but at the same time there has been an increase in three moral values-based arguments against infringing intellectual property rights, especially that counterfeit goods are not cool and that artists/creators may be harmed.

Two main themes emerged in the 2016 Youth IP Scoreboard that might form the basis of any communications aimed at increasing young people's awareness of intellectual property rights and the negative impacts of counterfeiting and piracy. These themes were personal safety and risk; and moral values.

In 2016, the theme of 'personal safety and risk' was found to carry more weight than 'moral values', albeit both resonated with most of the respondents. In 2019 statements about safety and risk again carry the most weight but there has also been notable change in the findings since 2016; in particular, an increase in the proportion of young people saying they would be influenced by three of the moral values-based considerations:

- that counterfeit goods and piracy are just not cool (up from 48 % to 56 %);
- that artists, creators and the teams behind them may be harmed (up from 60 % to 66 %);
- that counterfeit products can be bad for the environment (up from 58 % to 61%)

In parallel with these changes, there has been a *decrease* in the proportion of young people saying they would be influenced by the consideration that money spent on counterfeit goods goes towards organised crime. Whereas almost three-quarters of young people selected this in 2016, the 2019 figure is 6 percentage points lower, at 66%.

2. Introduction

2019 Intellectual Property and Youth Scoreboard

2.1 BACKGROUND AND OBJECTIVES

This study follows the first edition of the Intellectual Property and Youth Scoreboard (2016). The main objective of the 2016 study was to gather knowledge about how young people (aged 15-24) behaved online and what is their attitude towards counterfeiting. The specific aim of the research was to understand which drivers and barriers were the strongest when acquiring online digital content or purchasing physical goods that are offered legally and illegally. Having done so, the objective was to assess what could be done to tackle intellectual property infringement and raise awareness about intellectual property among young people. To identify what might be most effective in raising awareness and tackling intellectual property infringement the study explored what could be done to improve the situation in terms of communication.

The 2016 Intellectual Property and Youth Scoreboard consisted of two sub-studies, using two different methodologies: a qualitative study based on focus groups and a quantitative study based on online surveys. The 2019 study is based on the latter, to highlight the similarities and differences in comparison to the 2016 results and deliver a second edition. The scope is the same as that of 2016. The survey covers the 28 European Member States (EU28) and targets young people aged between 15 and 24 years.

This report sets out the results of the quantitative research, presenting the views of young people within the EU through a representative online survey. The questionnaire is unchanged in design from the original, which was based on the results of the qualitative focus groups in 2016. By keeping the survey consistent, the subsequent analysis could consider the trends over time and obtain quantifiable data on the perceptions and behaviour of young people now and then. The 2019 Intellectual Property and Youth Scoreboard, therefore, highlights the similarities and differences in terms of both the perceptions and behaviour of young people and whether the patterns observed in 2016 hold or not when assessing what can be done to tackle intellectual property infringement.

2.2 SURVEY METHODOLOGY

23 507 young people (aged 15-24) representing the EU28 were interviewed between the 3 June 2019 and the 8 July 2019. The sample was distributed with a target sample size of 1 000 in Member States with more than 5 million inhabitants, 500 in Member States with less than 5 million inhabitants and 250 in Member States with less than 1 million inhabitants. The survey was conducted using computer assisted web interviewing (CAWI). In two countries, Ireland and Luxembourg, this technique was not fully carried out and therefore the remaining interviews were conducted by telephone interview.

In quota sampling, the researcher aims to represent the major characteristics of the population by sampling a proportional amount of each. Variables that were monitored during the fieldwork included gender, age, education, background and region. Quotas on gender and age, in line with population statistics, were utilised. To ensure a homogenous approach across countries and minimise potential errors, questionnaire programming, data cleaning and analysis were fully centralised. At a 95 % confidence level, the maximum margin of error is +/–3 % for sample sizes of 1 000 respondents. The unweighted sample size for each country is shown in Table 2.1 below. The country results in this report were weighted based on age and gender, as were the aggregated results at EU level, with the addition of population size.

Table 2.1: Sample size per country

Country	Sample size	Country	Sample size
Austria	1 032	Italy	1 048
Belgium	1 039	Latvia	511
Bulgaria	1 023	Lithuania	514
Croatia	510	Luxembourg	251
Cyprus	258	Malta	254
Czechia	1 019	Netherlands	1 070
Denmark	1 017	Poland	1 016
Estonia	506	Portugal	1 031
Finland	1 027	Romania	1 050
France	1 147	Slovakia	1 062
Germany	1 039	Slovenia	510
Greece	1 021	Spain	1 069
Hungary	1 019	Sweden	1 057
Ireland	512	UK	1 112

In what follows, the results are discussed and the differences between subgroups are described when these are statistically significant (at a significance level of ≤0.05), unless mentioned otherwise. The subgroups that are considered by default are reported in Table 2.2 below and relate to the socio-demographic characteristics of gender, age group, education level (completed education and undertaking education), employment status and income as a student. The age groups are sometimes referred to as teenagers (15-17), young adults (18-21) and adults (22-24) for the purpose of reporting.

The results from 2019 are also compared to those of 2016. As a benchmark, where results are significantly different and amount to 3 percentage points (or more), these differences are included in the reporting. This benchmark is utilised in order to highlight significant differences that account for a meaningful change in the overall percentage between the two waves of the survey. The percentages in this report are also given without a decimal and, due to rounding percentages, may not add up to 100 % exactly.

Table 2.2: Socio-demographic breakdown of the sample

Variable	Proportion
Gender	
Male	51 %
Female	49 %
Age	
15-17	29 %
18-21	40 %
22-24	32 %
Education level (undertaking)	
Low (up to lower secondary education)	19 %
Medium (up to higher secondary education/vocational training)	45 %
High (tertiary education)	35 %
Education level (completed)	
Low (up to lower secondary education)	17 %
Medium (up to higher secondary education/vocational training)	50 %
High (tertiary education)	33 %
Employment status	
Student	76 %
Employed	19 %
Unemployed	5 %
Income as student	
Income	52 %
No income	48 %

3. Digital Content

2019 Intellectual Property and Youth Scoreboard

Young people continue to access digital content in large numbers — indeed, almost all stream or download music and films/series. In general, streaming is preferred over downloading and streaming has become even more popular for music and films/series.

The main factors young people take into account when selecting sources of digital content is the quality of the content, the perceived safety of the source site and cost. At least half of young people mention those factors as being important. Nevertheless, while cost ranks in the top three it is not mentioned as often as it was back in 2016 as a main factor (down 8 percentage points). Other important factors are the amount of choice available and content appearing to be offered on a legal basis. The proportion citing the latter factor is slightly higher than in 2016 (up by 4 percentage points).

The proportions of young people accessing illegal sources for digital content is lower than in 2016 — 38 % of young people in 2016 had accessed illegal sources either intentionally or unintentionally compared to 33 % in 2019. Just over one in five young Europeans **intentionally** use illegal sources of digital content, and this figure has decreased since 2016, by 4 percentage points. Those most likely to use illegal sources continue to be males, students, and those with a higher-than-average level of education. Half of young people in Europe today (51 %) do not access illegal sources compared to 40 % in 2016, although this figure varies among countries, with 70 % in Germany having not used illegal sources, to only 28 % in Croatia. Very few young Europeans only use illegal sources — as was the case in 2016, 80 % of young people say they use legal sources.

Most commonly, young people are accessing films and series through illegal sources. However, this is less common than it was in 2016 (a shift of 7 percentage points) and the proportion of those using illegal sources to access music has significantly dropped since 2016 (a shift of 17 percentage points).

As to ‘why’ young people use illegal sources to access digital content, price remains the primary reason, although this was slightly less often mentioned than in 2016. Furthermore, arguments such as: there is a larger choice of illegal sources; or, it is only for personal use; or, it is quicker to access through illegal sources; or, it is easier to find and access, etc., are all less compelling in comparison to 2016. In that sense, of the young people who access content from illegal sources the top arguments remain the same but appear to not be as powerful now as they were in 2016 — with the exception of those citing ‘only being able to find desired content using illegal sources’ as their motivation to use illegal sources, which remained almost the same.

Among those who do not know whether they have used illegal sources, as in 2016 most (84 %) say that it is because they cannot distinguish the source as being legal or otherwise.

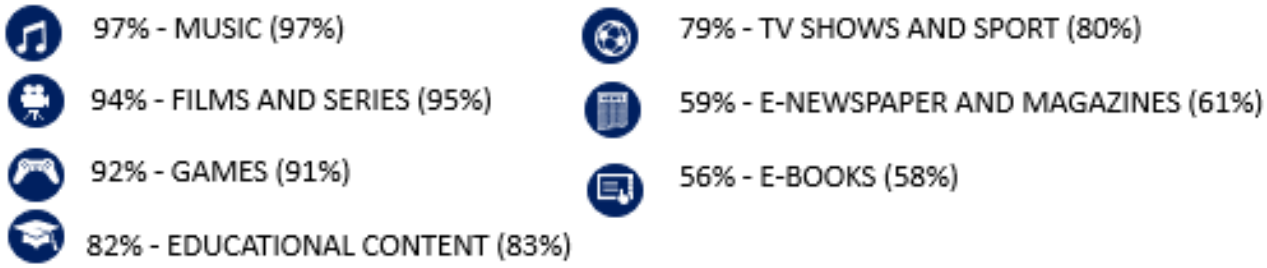
Overall, young Europeans report high levels of satisfaction with their experiences of accessing digital content. Still, a significant proportion has also experienced problems — most commonly spam; inability to access content in another country; viruses or malware; paying for a service or content that does not

work. Since 2016, there has been a decreased experience of spam, viruses or malware, while the experience of services or content not working has slightly increased.

3.1 USAGE OF DIGITAL CONTENT

Across Europe, young people continue to access digital content in large numbers. Indeed, almost all (97 %) stream or download music and more than 9 in 10 stream or download films/series (94 %) and games (92 %). Around 8 in 10 stream or download educational content (82 %) and TV shows or sport (79 %). The proportions accessing e-newspapers and magazines, and e-books remain somewhat lower, at 59 % and 56 % respectively (Figure 3.1 below).

Figure 3.1: Use of digital content (2016 figures in parentheses) ([2])

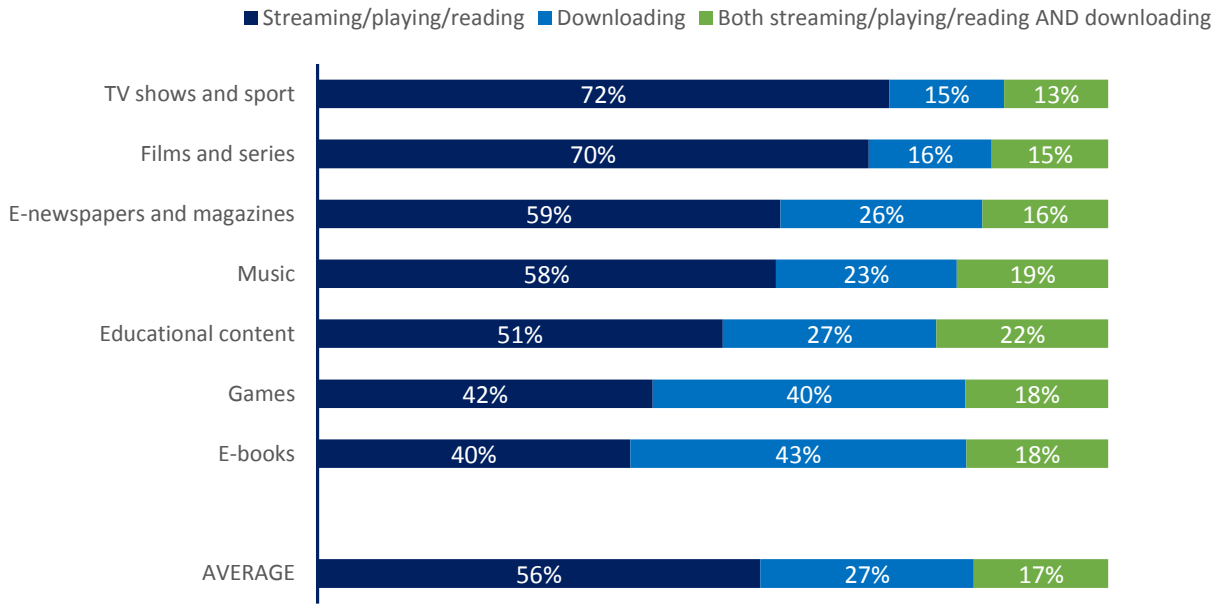


([1]) Source: Question II3.1: How often have you listened to, watched, read, used, played, downloaded, streamed the following content from the internet during the past 12 months? (Answers: daily, weekly, monthly, or rarely, but not never) (N=23724).

3.2 STREAMING VERSUS DOWNLOADING

As in 2016, young people generally express a preference for streaming rather than downloading digital content — although this varies to an extent depending on the specific type of content. Thus, whereas between half and three-quarters of young people prefer to stream rather than download TV shows and sport (72 %), films and series (70 %), e-magazines and newspapers (59 %), music (58 %) and educational content (51 %), the figures are lower for games (42 %) and e-books (40 %). Indeed, in these cases, downloading is almost as popular (or more popular) as streaming (see Figure 3.2 below). These results for the most part mirror those recorded in 2016, although there has been an increase in the proportion expressing a preference for streaming music (up by 9 percentage points) and films and series (up by 4 percentage points).

Figure 3.2: Relative popularity of streaming and downloading for different forms of digital content ([3])



([3]) Source: Question II3.a: What do you do most? Films/series (N=22483), Music (N=23022), Games (N=21914), E-books (N=13659), E-newspapers and magazines (N=14042), TV shows and sport (N=19044), Educational content (N=20141), Other (N=16659).

Preferences in relation to streaming and downloading continue to vary by age: teenagers (15-17 year olds) are more likely than young adults (18-21 year olds) to prefer streaming, who in turn are more likely to do so than adults (22-24 year olds). Older age groups express a preference for downloading digital content more often; the only exception is in the case of music which is more commonly downloaded by teenagers and young adults (see Table 3.1 below).

Table 3.1: Relative popularity of streaming and downloading for different forms of digital content, by age

Variable	Streaming/playing/ reading			Downloading/copying to your device			Both streaming and downloading		
	15-17 year olds	18-21 year olds	22-24 year olds	15-17 year olds	18-21 year olds	22-24 year olds	15-17 year olds	18-21 year olds	22-24 year olds
TV shows/sport	73 %	71 %	73 %	15 %	15 %	13 %	13 %	13 %	13 %
E-newspapers/ magazines	58 %	59 %	59 %	26 %	24 %	27 %	16 %	17 %	15 %
Films/series	71 %	69 %	69 %	14 %	16 %	16 %	15 %	15 %	15 %
E-books	42 %	39 %	38 %	41 %	42 %	45 %	17 %	19 %	18 %
Educational content	56 %	51 %	47 %	25 %	26 %	30 %	19 %	23 %	23 %
Music	59 %	55 %	61 %	23 %	24 %	21 %	18 %	21 %	18 %
Games	45 %	42 %	41 %	37 %	40 %	41 %	18 %	18 %	18 %

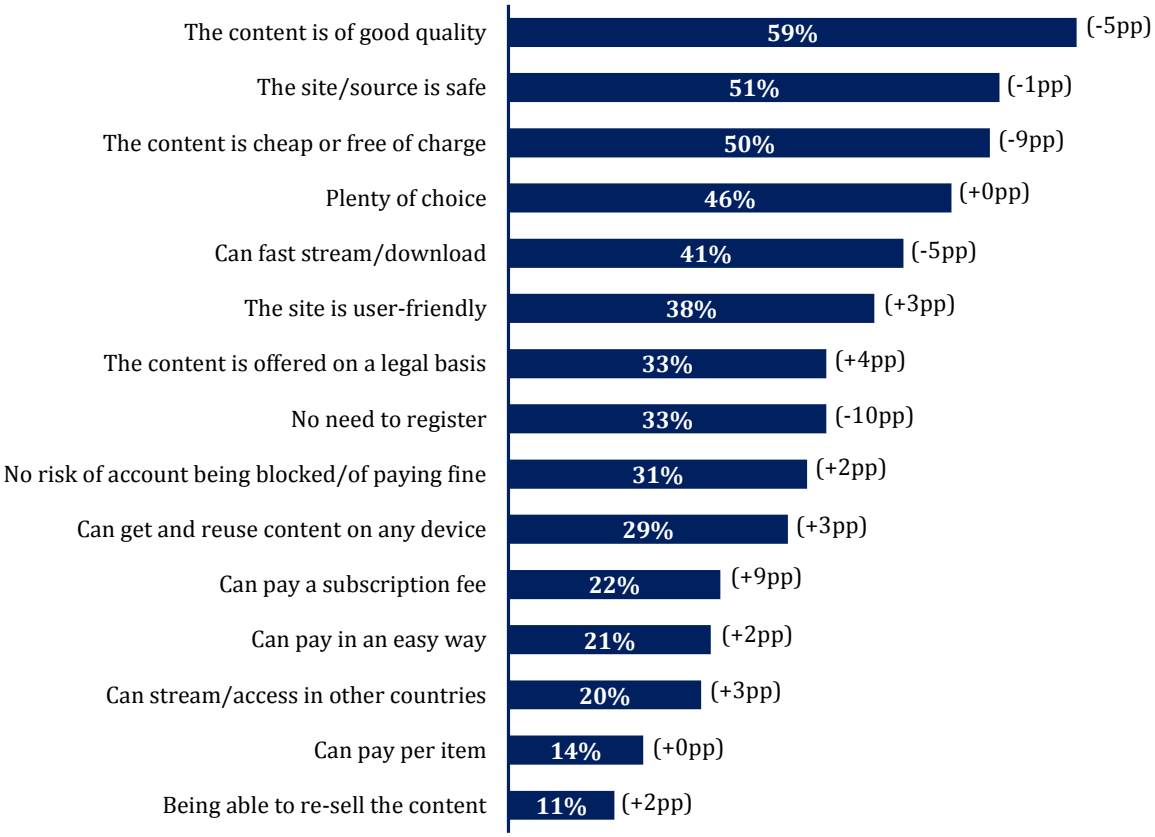
There are further differences by gender: females are a little more likely than males to favour downloading over streaming, with the differences most pronounced in relation to e-newspapers and magazines (64 % v 54 % respectively) and TV shows/sport (76 % v 69 %). No such gender-based differences were apparent in the 2016 survey.

3.3 DRIVERS OF ACCESSING DIGITAL CONTENT

Young people take a range of factors into account when selecting sources of digital content, but the main factors continue to be the quality of the content (59 %), the perceived safety of the source site (51 %) and cost (50 %). That said, the proportions mentioning quality and cost have decreased since 2016 by 5 and 9 percentage points respectively.

Other factors that continue to have an important bearing on content selection include the amount of choice available (46 %), the speed of the streaming/downloading process (41 %) and the user-friendliness of the site (38 %), followed by the content being offered on a legal basis (33 %) and the absence of a requirement to register (33 %). Compared to 2016, the proportion citing the apparent legality of the source is slightly higher (by 4 percentage points), while the proportion citing the absence of a registration requirement is lower, by 9 percentage points (see Figure 3.3 below).

Figure 3.3: Factors influencing choice of digital content ([4])



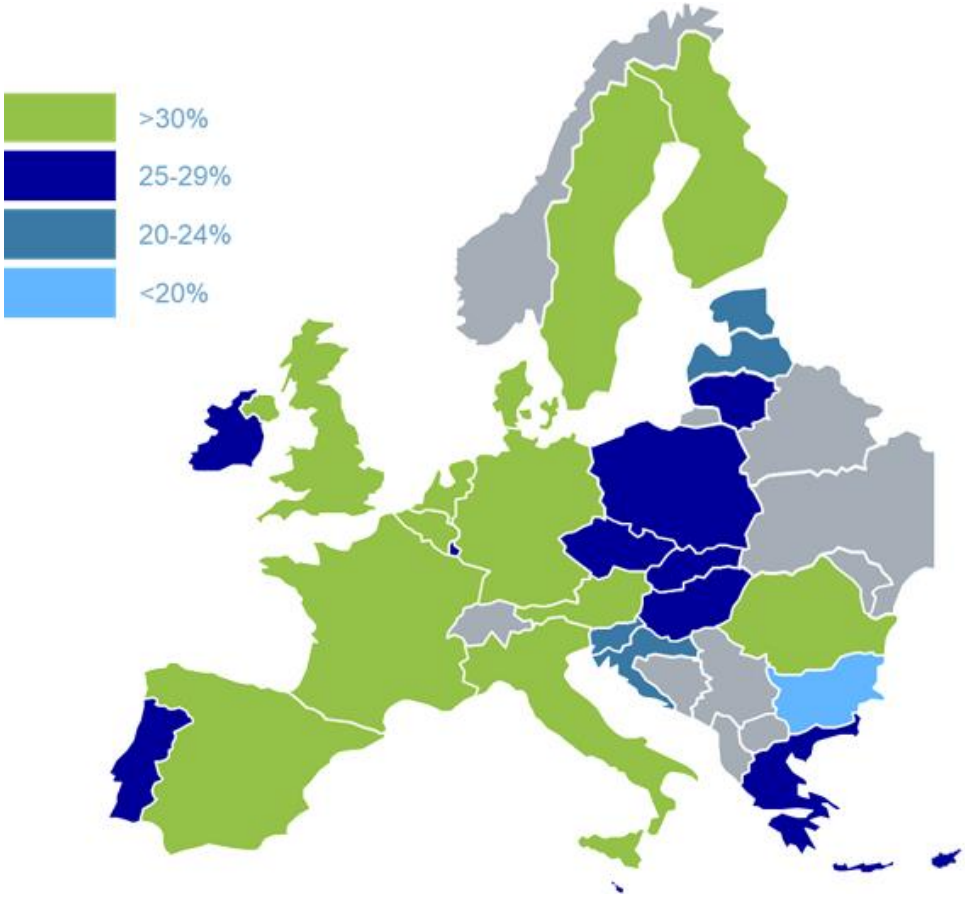
As in 2016, there are some gender-based differences in the factors young people take into account when selecting sources of digital content. Most notably, females are more likely than males to cite the safety of

([4]) Source: Question II4: If you want to use, play, download or stream content from the internet such as …, what is more important to you? Please select 5 things you find most important and rank them in your top 5 (N=23567).

the source (54 % v 47 % respectively) and the absence of a requirement to register (37 % v 30 %), whereas males are more likely to cite the ease of the payment method (24 % v 18 % of females), and the potential to resell the content (13 % v 9 %).

The question of young people's attitudes towards the legality of their sources of digital content is interesting to consider, especially as this has increased since 2016. Is the legality of the source something that young people deem to be important when deciding on which sources to use in all countries? The results of the survey find that one-third (33 %) of young people state they consider the legality of the source as important when accessing digital content. Nevertheless, this proportion varies significantly from just 13 % in Bulgaria to 42 % in Denmark. These results are similar to those of 2016 with the same countries with the highest and lowest proportions finding legality important, although some (minor) shifts can be noted. The most notable change is found in Finland, where the proportion of young people who find the legality of the source important increased by 12 percentage points (from 28 % in 2016 to 40 % in 2019).

Figure 3.4: Proportion of young people for whom the legality of digital content is an important aspect ([5])



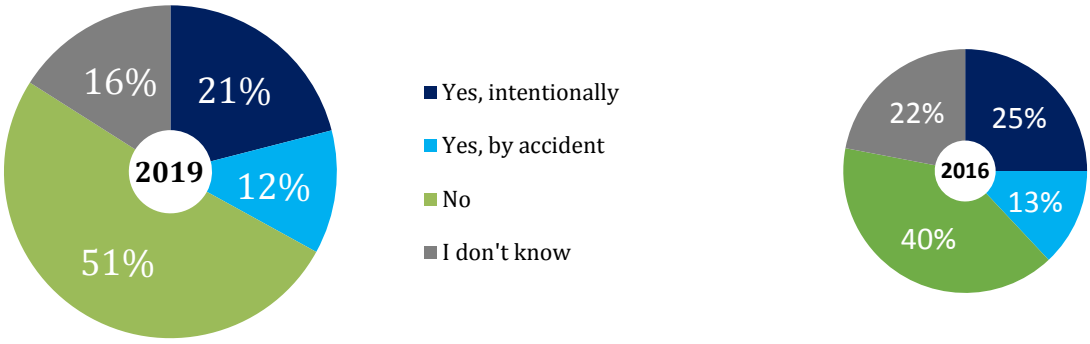
([5]) Source: Question II4: If you want to use, play, download or stream content from the internet such as … categories, what is more important to you? Please select 5 things you find most important and rank them in your top 5 (N=23567).

3.4 ACCESSING DIGITAL CONTENT — LEGALLY AND ILLEGALLY

As noted above, only one-third of young people say the legality of sources is an important consideration when choosing digital content. To explore this issue further, respondents were asked whether they had used, played, downloaded or streamed content from illegal sources in the last 12 months.

In total, one-third of young people have accessed illegal sources, with 21 % having done so intentionally, and 12 % *un*intentionally. As Figure 3.5 below shows, the number of young people who have accessed illegal sources is lower than in 2016, while there has been a corresponding increase in the proportion saying they have *not* used illegal sources, and a decrease in the proportion saying they are unsure. More generally, it remains rare that young people rely exclusively on illegal sources — 80 % of the sample said they use legal sources to access digital content.

Figure 3.5: Use of illegal sources to access digital content ([6])



([6]) Source: Question IV2: During the past 12 months, have you used, played, downloaded or streamed content from illegal sources (websites)? (N=23567 in 2019, N=24083 in 2016) and IV3: Did you use the illegal source(s) (website(s)) for content intentionally? (N=8958 in 2019, N=9907 in 2016).

3.5 YOUNG PEOPLE WHO INTENTIONALLY USE ILLEGAL SOURCES

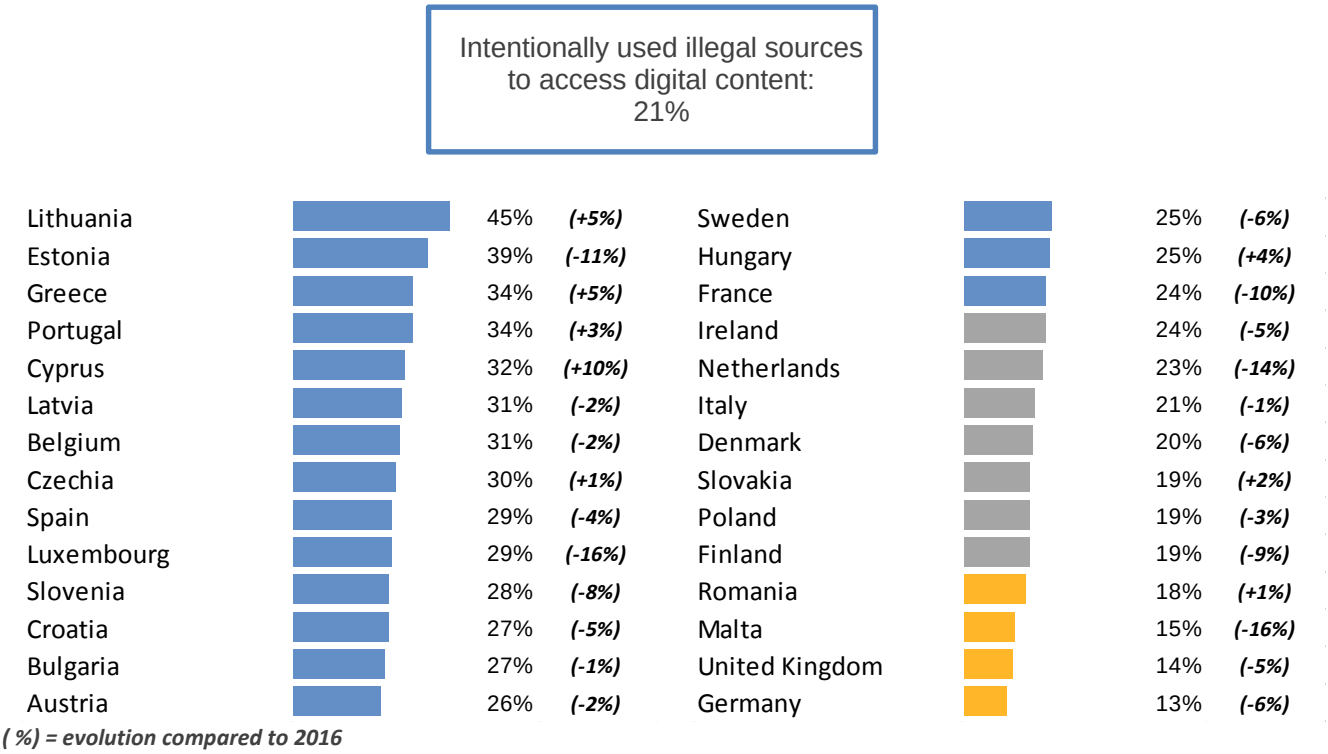
Young people who *intentionally* use illegal sources are more likely to be male than female, to be over the age of 17, to have a higher-than-average level of education and be students. There are no differences by employment status but, as in 2016, students with an income are more likely than those without to use illegal sources intentionally (see Table 3.2 below).

Table 3.2: Young people who intentionally use illegal sources

Variable	Proportion
Gender	
Male	23 %
Female	19 %
Age	
15-17	14 %
18-21	24 %
22-24	24 %
Education level (undertaking)	
Low (up to lower secondary education)	15 %
Medium (up to higher secondary education/vocational training)	19 %
High (tertiary education)	29 %
Education level (completed)	
Low (up to lower secondary education)	15 %
Medium (up to higher secondary education/vocational training)	19 %
High (tertiary education)	25 %
Employment status	
Student	22 %
Employed	21 %
Unemployed	19 %
Income as student	
Income	26 %
No income	16 %

There are also wide variations in these proportions by country (see Figure 3.6 below). Young people from the Baltic countries are most likely to say they intentionally use illegal sources. For example, 45 % in Lithuania and 39 % of Estonia intentionally use illegal sources. This is in comparison to Germany (13 %), the United Kingdom (14 %), Malta (15 %) and Romania (18 %) where less than one-fifth of young people intentionally use illegal sources. This pattern is broadly similar to that of 2016. Both Lithuania and Estonia had the highest percentages of those who used illegal sources to access digital content and remain at the top, while Luxembourg is no longer in the top 3 (29 % in 2019 v 45 % in 2016). Similarly, Germany, the UK and Romania remain among those with the smallest proportions of young people intentionally accessing digital content from illegal sources. In 2019 Malta joined this group, with 15 % intentionally using illegal sources to access digital content (whereas this was twice as much in 2016).

Figure 3.6: Proportion of young people who intentionally accessed digital content from illegal sources per country



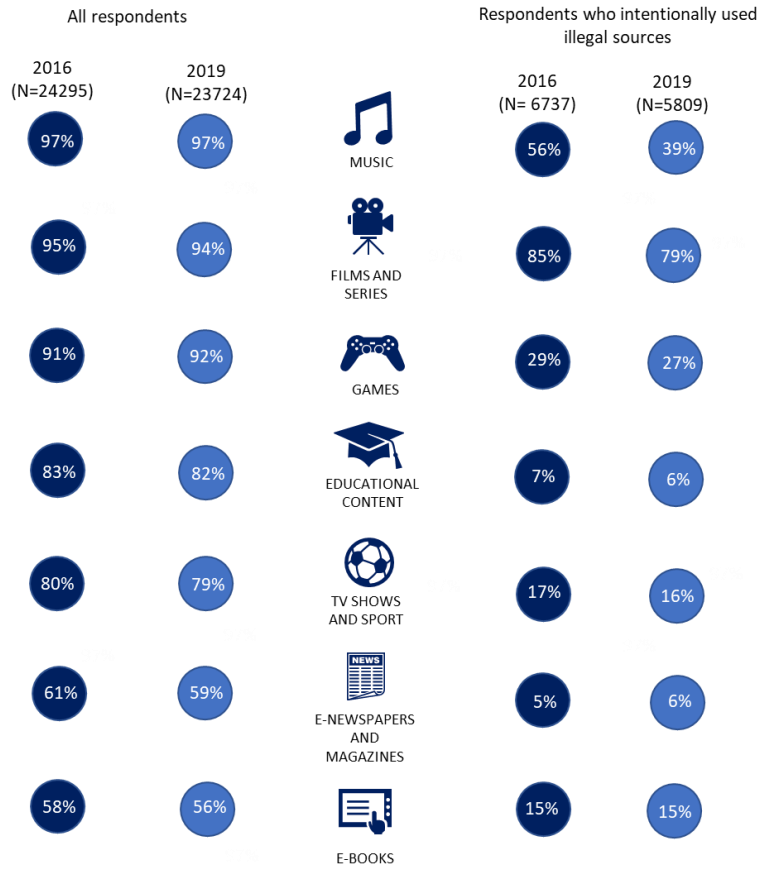
(%) = evolution compared to 2016

3.5.1 TYPE OF CONTENT ACCESSED FROM ILLEGAL SOURCES

As can be seen in Figure 3.7 below, the type of content young people intentionally access illegally continues to show limited correlation with digital consumption patterns more generally. **Thus, whereas a majority of all respondents (indicated on the left-hand side of the figure) digitally consume films/series, games, educational content, TV shows, sport, e-newspapers/magazines, and e-books, those intentionally accessing illegal sources (indicated on the right-hand side of the figure) are predominantly doing so to download or stream films and series**. Almost four in five (79 %) use illegal sources for this purpose, whereas half as many or fewer use illegal sources to access other types of content. The disparity is most pronounced in relation to music — whereas this is the most commonly consumed type of digital content overall (accessed by 97 % of young people), just 39 % of those intentionally accessing illegal sources do so to download or stream music.

Reflecting the overall decline in intentional use of illegal digital sources, as seen in Figure 3.5 above, the proportions of young people intentionally accessing illegal sources of music or films and series are appreciably lower today than in 2016 — by 17 and 6 percentage points respectively.

Figure 3.7: Use of digital content in general and intentional use of content from illegal sources ([7])



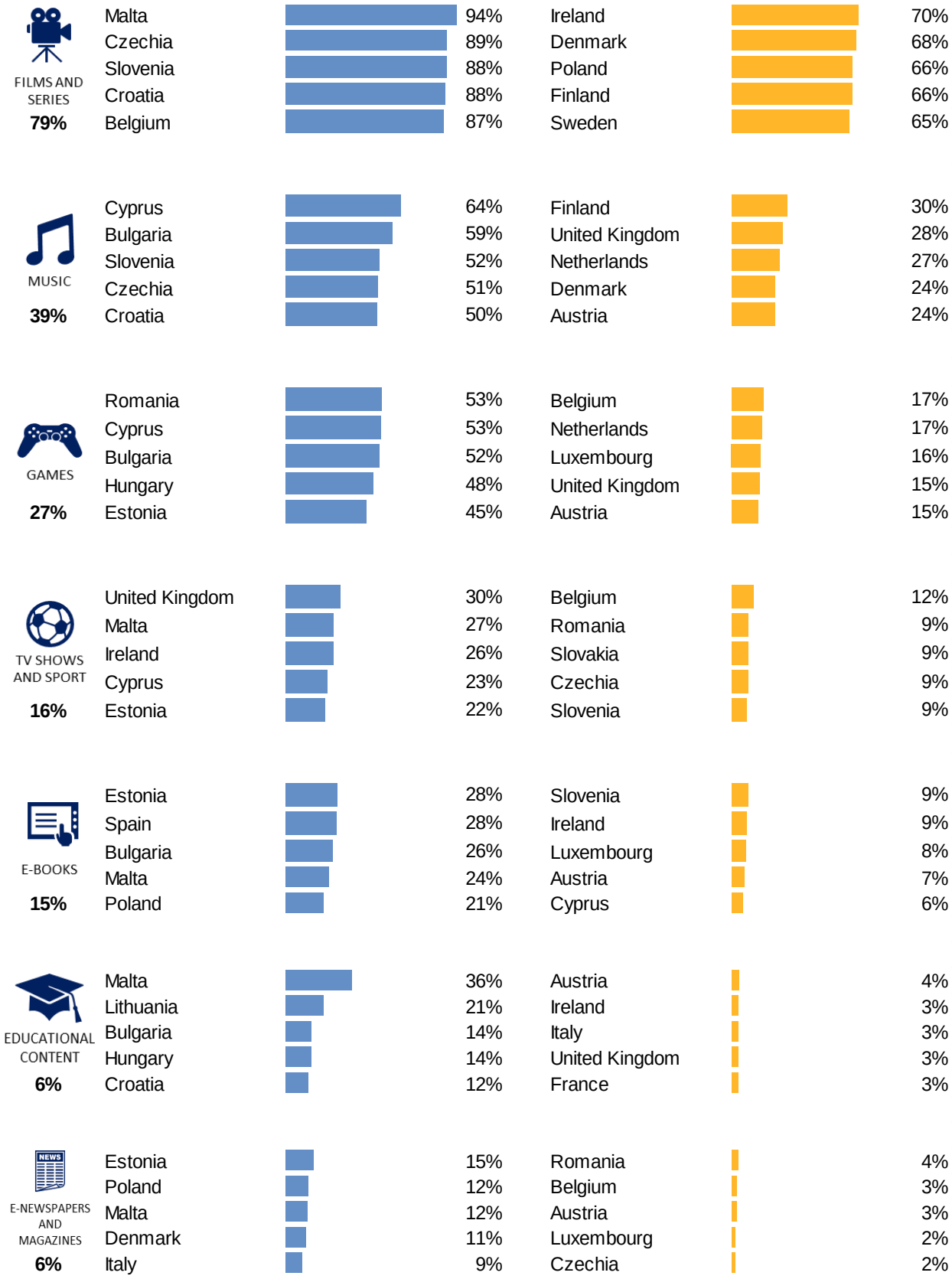
([7]) Source: Question II3.1: How often have you listened to, watched, read, used, played, downloaded, streamed the following content from the internet during the past 12 months? (N=23724) and IV4: Which type of content did you use, play, download or stream intentionally from a legal source (website)? Please indicate all that apply (N=5809).

The type of content used is very similar across countries. Music, films and series and games are used most often and e-books and e-newspapers and magazines least often. Interestingly, in Malta, educational content (96 %) is used more often than games (‘only’ 90 %).

As for the intentional use of content from illegal sources, there is little variation between countries. In all countries, films and series are accessed via illegal sources most often by young people, e-newspapers and magazines and educational content least often. These figures are also indicated in the following Figure 3.8.

- Of those who use illegal sources, at least 94 % access films and series in Malta, well above the European average of 79 %. In Sweden, Finland, Poland, Denmark and Ireland this proportion is significantly below the European average (65 %, 66 %, 66 %, 68 %, 70 % respectively).
- Of those who use illegal sources, more than half are accessing music in Cyprus, Bulgaria, Slovenia and Czechia, clearly above the European average of 39 %.
- Of those who use illegal sources, more than 50 % are accessing games in Romania, Cyprus and Bulgaria compared to the European average of 27 %.
- Of those who use illegal sources, more than one in four are accessing e-books in Estonia, Spain and Bulgaria, which is clearly more than the European average of 15 %.
- Of those who use illegal sources, 15 % of young people in Estonia are accessing e-newspapers and magazines, which is more than double the European average of 6 %.
- Of those who use illegal sources, 30 % are accessing TV shows and sport in the UK, almost double the European average of 16 %.
- Of those who use illegal sources, at least 15 % are accessing educational content in Bulgaria, Hungary, Lithuania, Malta and Romania, which is clearly above the European average of 6 %.

Figure 3.8: The intentional use of digital content from illegal sources by country and category of content

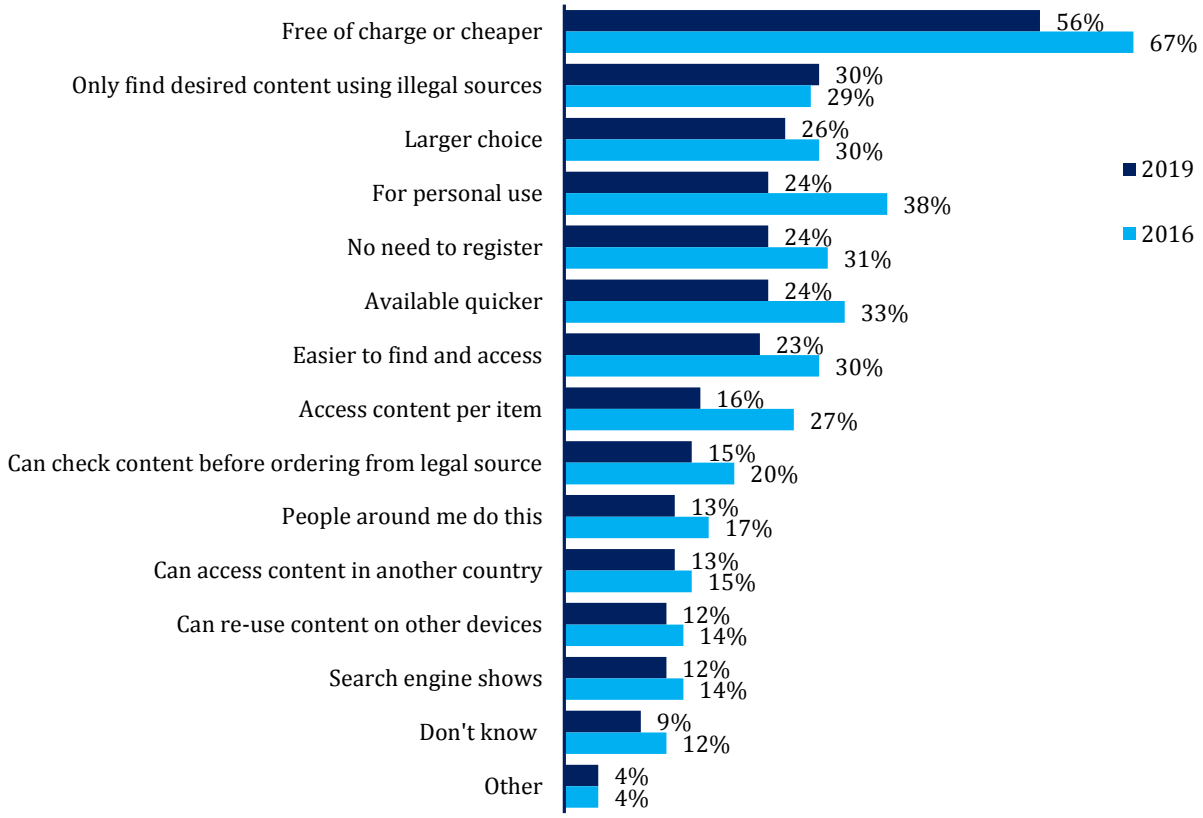


3.5.2 REASONS FOR USING ILLEGAL SOURCES

As the previous survey found, the reasons young people choose to access illegal sources of digital content are many and varied. However, the main reason by quite a margin continues to be price, with over half (56 %) mentioning this. The next most common are: that desired content was only available illegally (30 %); a larger choice of content was available (26 %); the content was for personal use only (24 %); there was no need to register with the source site (24 %); and the content was available quicker (24 %).

Overall, and as Figure 3.9 below shows, the overall ranking of reasons is broadly in line with that for 2016. At the same time, there has been a decrease in the absolute proportion of respondents mentioning each reason, which may in part reflect the broader decrease in intentional use of illegal sources. This is most noticeable in relation to the price driver where there has been an almost 10 percentage point difference since 2016. Therefore, the fact that illegal content is free or cheaper remains an important driver, but the proportion mentioning this as the main reason has declined.

Figure 3.9: Drivers to intentionally use illegal sources ([8])



([8]) Source: Question IV5: You indicated that you have used illegal sources (websites) intentionally for online content during the past 12 months. What was the main reason for this? Please indicate all that apply (N= 5809).

Analysis of the results by key subgroups reveals similar patterns of variation to those uncovered in 2016. In particular:

- **Cost** is more of a trigger for females than for males (58 % v 55 %), for students than for those who are employed (58 % v 48 %) and for students without income than for those with (64 % v 55 %). Price is the most important driver for young Europeans in all countries, with over 70 % indicating this as a reason for using illegal sources intentionally for online content in Cyprus, Czechia, Estonia, Slovenia, Portugal and Croatia, while in Finland, Germany, Sweden, Denmark and Ireland this reason is given by less than 50 %.

- **Ease of access** relates to such factors as the amount of choice available; the absence of a requirement to register with the source site; and content being available quickly. Again, females make greater mention of these considerations than males — for example, 28 % of females mention the amount of choice available compared to 23 % of males. Females are also more likely than males to say their desired content is only available illegally (34 % v 27 %). One-third or more of young people in Slovakia, Estonia, Czechia and Croatia argue that ease of access is an important trigger for them, while this is less important in the Netherlands, Finland, Denmark, Sweden, Austria and Spain (ranging from 13 % to 17 %).

- **The portability of illegal content** is more commonly mentioned by males than females — for example, 14 % of males mention being able to use content on other devices and an equal proportion mention being able to access content in other countries, compared to 12 % and 10 % of females respectively. Being able to use content on other devices is particularly important in Croatia and Hungary (24 % and 20 %, respectively), while Estonia, Denmark and Luxembourg value being able to access content in other countries (25 %, 24 %, 23 %, respectively).

- **Being able to check content before ordering it** was also more commonly mentioned by males than females (18 % v 11 %). This reason is mostly mentioned in Slovakia and Estonia (both 28 %), and least mentioned in Cyprus (0 %) and Portugal (only 9 %).

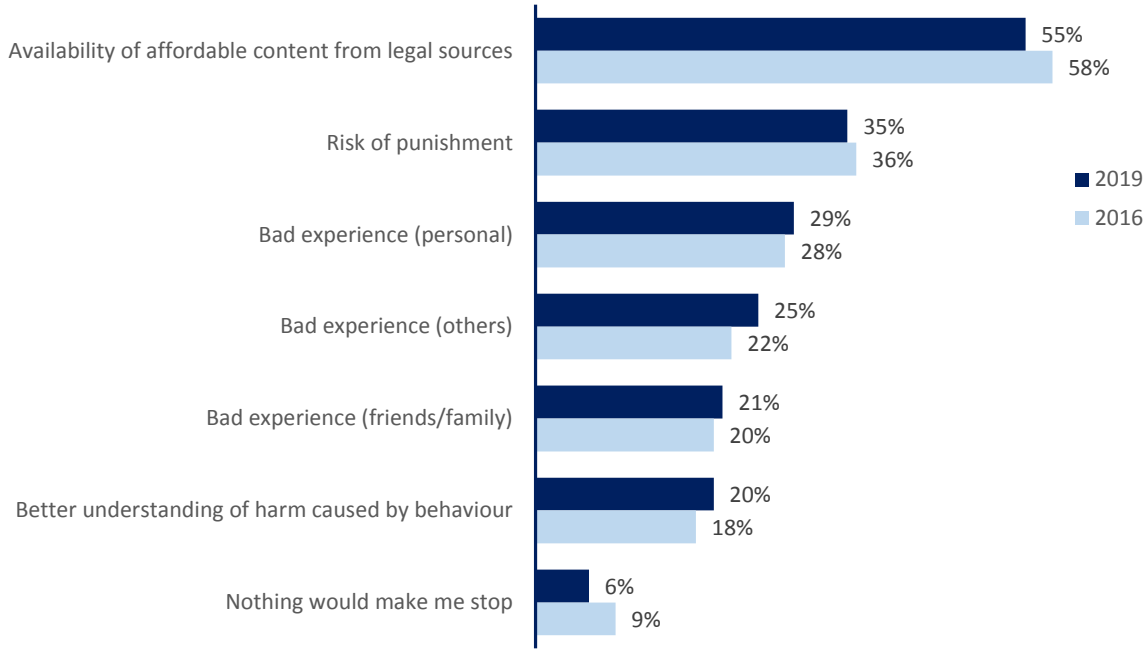
3.5.3 FACTORS THAT WOULD STOP YOUNG PEOPLE USING ILLEGAL SOURCES

Most young people say there are factors that would stop them using illegal sources of digital content. Indeed, just 6 % say *nothing* would stop them doing this; 3 percentage points fewer than in 2016.

The 6 % rises slightly among some subgroups of young people,— specifically to 7 % among males (compared to 5 % among females), to 12 % among those with the lowest level of education (compared to 9 % of those with the highest level), and to 16 % among the unemployed (compared to 6 % of students and 7 % of those in employment). The proportion of young people saying nothing would stop them from using illegal sources of digital content varies strongly across countries; from 21 %, 18 %, 17 % in Cyprus, Bulgaria and Latvia, respectively, to only 2 % in Germany. Interestingly, in Germany, this percentage decreased strongly, as it was more than five times higher in 2016 (11 %). Other strong decreases can be found in Malta (from 28 % in 2016 to 13 % in 2019) and also in the top country Cyprus (from 30 % to 21 %). In Lithuania and Latvia, however, more young people now state that nothing would make them stop using illegal sources of digital content (+6 % in both countries).

As in 2016, the main factor that young people say would stop them using illegal sources of content is if legal content was more affordable (55 %), followed by a risk of punishment (35 %) and a bad personal experience (29 %). These results are in line with those for 2016 (see Figure 3.10 below).

Figure 3.10: Factors that would make young people stop using illegal sources to access digital content ([9])



This rank ordering of considerations holds across the different subgroups of respondents. That said, marginally more females than males mention most of the considerations — for example, 37 % of females

([9]) Source: Question IV6: You indicated that you have 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 (N=5809).

mention the risk of punishment, compared to 33 % of males. The only exception is having a better understanding of the harm caused, which was more commonly mentioned by males (21 % v 18 % of females).

There was further variation by employment status: more students than young people in employment or unemployed say they would stop accessing illegal sources if legal content was more affordable (57 % compared to 44 % of the unemployed), if there was a risk of punishment (35 % compared to 26 % of the unemployed), and if they had a negative personal experience (31 % compared to 22 % of the unemployed). Students with no income are particularly likely to mention the affordability issue (60 % v 55 % of those with an income).

Young people with the lowest level of education, meanwhile, were the group most likely to say they would stop using illegal sources if they had a better understanding of the harm caused (28 % v 20 % of those with a medium or higher level of education).

More affordable legal content is the main factor in all countries, except for Luxembourg where risk of punishment is the main factor that would make young people stop using illegal sources (57 %). In 2016 this was also the main factor for most countries, except Slovenia, Belgium and Luxembourg where risk of punishment would most likely make them stop using illegal sources.

3.6 YOUNG PEOPLE WHO DO NOT INTENTIONALLY ACCESS DIGITAL CONTENT FROM ILLEGAL SOURCES

Young people who do not intentionally access digital content from illegal sources comprise two groupings: those who have accessed illegal content *by accident* (12 % of all those surveyed) and those who have *not accessed it at all* (51 %). As can be seen in Table 3.3 below, the former group are more likely to be male than female, while the latter are more likely to be female.

Those who have not accessed illegal content at all also tend to be those with a lower level of education in comparison to those with higher levels of education, and to be unemployed rather than students or those in employment.

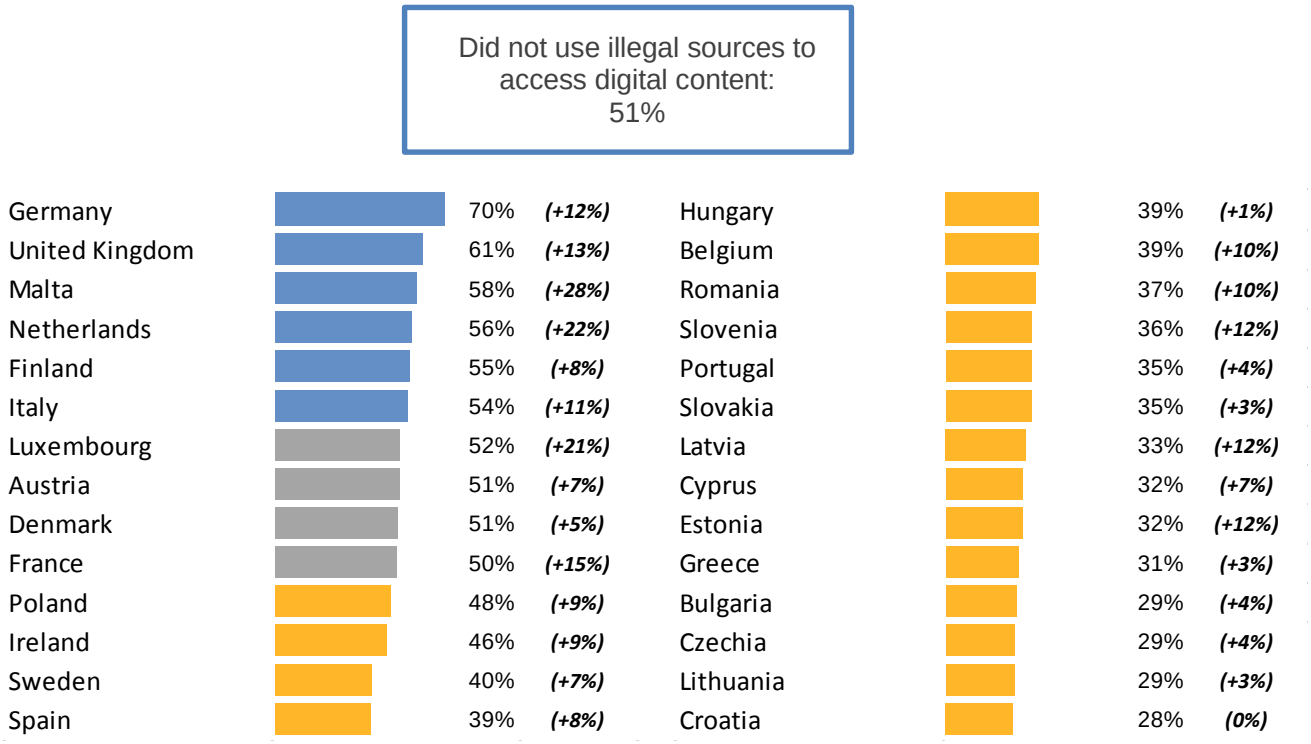
Table 3.3: Profile of young people who do not intentionally use illegal sources

Variable	Proportion of those who did not use illegal sources	Proportion of those who accidentally used illegal sources
Gender		
Male	50 %	13 %
Female	52 %	10 %
Age		
15-17	58 %	10 %
18-21	48 %	13 %
22-24	49 %	12 %
Education level (completed)		
Low (up to lower secondary education)	61 %	12 %
Medium (up to higher secondary education/ vocational training)	54 %	13 %
High (tertiary education)	51 %	11 %
Education level (undertaking)		
Low (up to lower secondary education)	57 %	11 %
Medium (up to higher secondary education/ vocational training)	52 %	12 %
High (tertiary education)	44 %	12 %
Employment status		
Student	50 %	12 %
Employed	55 %	12 %
Unemployed	50 %	12 %
Income as student		
Income	46 %	13 %
No income	55 %	11 %

There is some variation between countries. The large majority of young people from Germany (70 %), the United Kingdom (61 %) and Malta (58 %) claim they do not use illegal sources, whereas in Croatia this is only 28 %. (see Figure 3.11 below). The share of young people who unintentionally accessed illegal content ranges from only 5 % in Malta to 18 % in Slovakia.

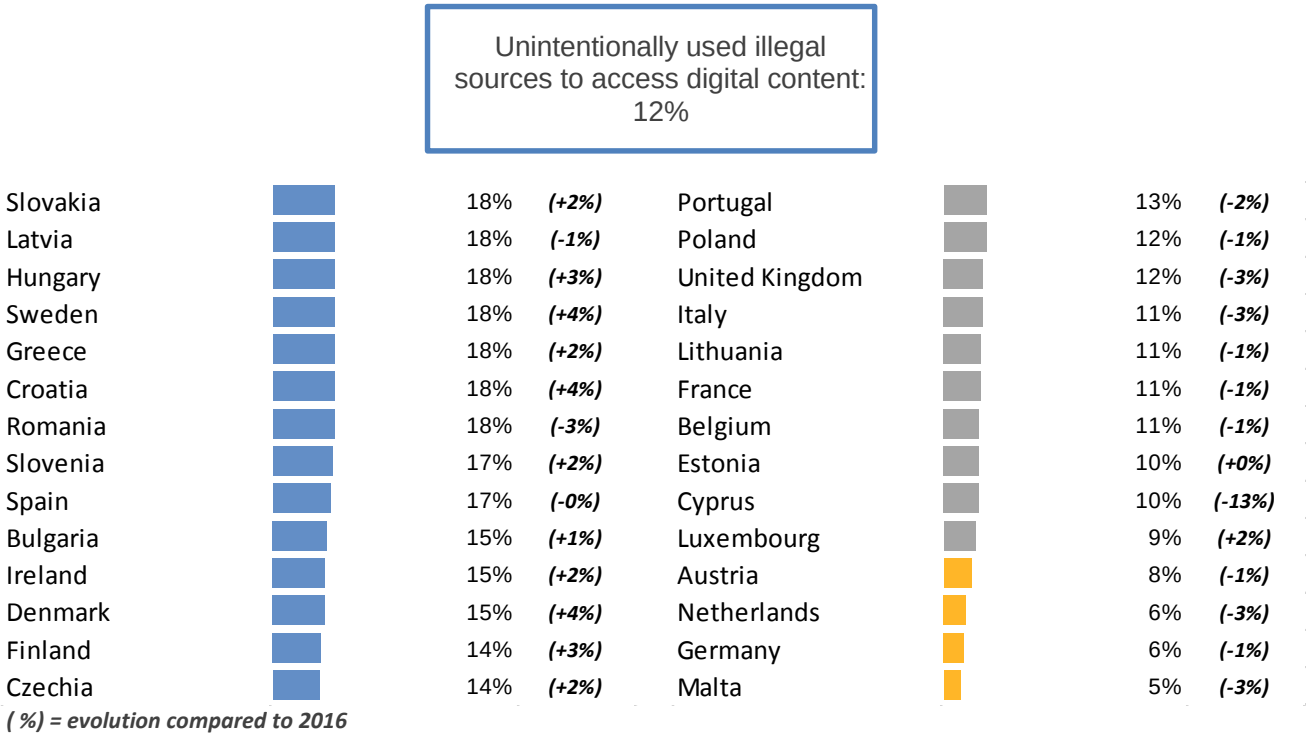
Compared to 2016, we see similar patterns. Germany, the United Kingdom and Finland remain at the top of the ranking, now joined by Malta and the Netherlands where the proportion of young people who did not use illegal sources to access digital content increased strongly in 2019 compared to 2016. A significant increase of this proportion can also be noted for Luxembourg. At the bottom of the ranking some shifts took place. Estonia, Latvia and Slovenia make way for Croatia, Lithuania, Czechia and Bulgaria, where less than 30 % did not use illegal sources to access digital content.

Figure 3.11: Proportion of young people who did not access digital content from illegal sources per country



(%) = evolution compared to 2016

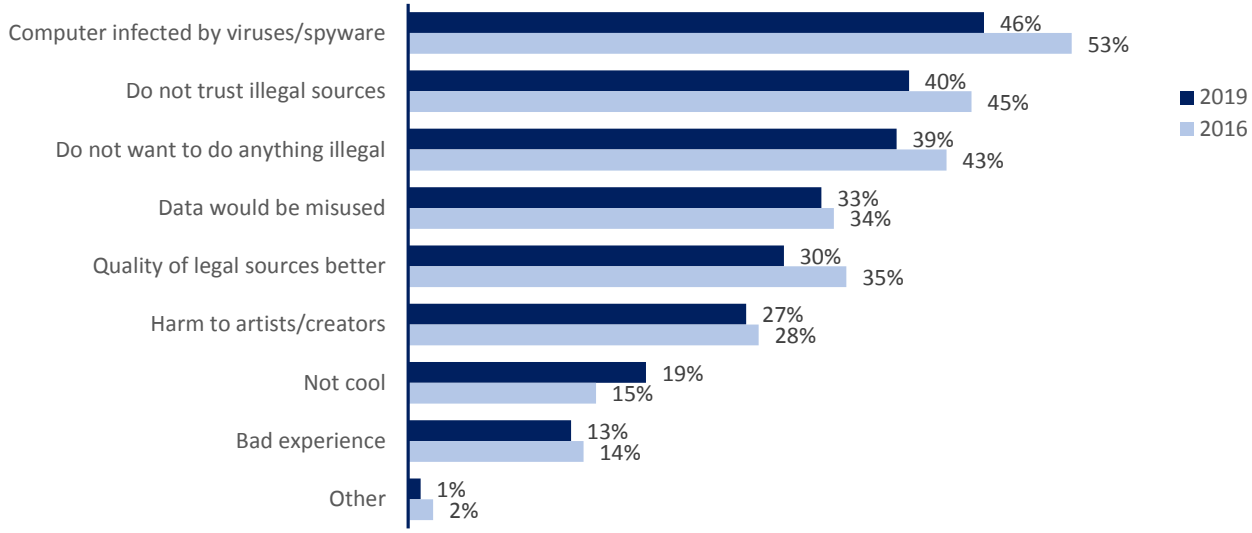
Figure 3.12: Proportion of young people who unintentionally accessed digital content from illegal sources per country



In order to shed light on why young people do not intentionally use illegal sources, respondents who unintentionally used illegal sources (i.e. they did so by accident) were asked why they do not use illegal sources intentionally. The main reason given for not intentionally using illegal sources, mentioned by almost half (46 %) of those asked, is fear of the risks posed by viruses or spyware, followed by a lack of trust in illegal sources (40 %) and a general aversion to doing anything illegal (39 %). Other common reasons are concern about data misuse (33 %) and a belief that the quality of legal sources is better (30 %).

As Figure 3.13 below shows, the proportions that mention each reason, with the exception of concern about data misuse, is lower than in 2016. Mention of concern about data misuse has remained stable.

Figure 3.13: Reasons for not using illegal sources to access digital content ([10])



Again, there were some clear gender-based differences in the results. As in 2016, females are more likely than males to mention concern about viruses and spyware (53 % v 41 %), potential data misuse (36 % v 31 %), and to express distrust in illegal sources (42 % v 38 %).

([10]) Source: Question IV7: You indicated that you have not used illegal sources (websites) intentionally for online content during the past 12 months. What was the reason for this? Please indicate all that apply (N=3149).

3.7 YOUNG PEOPLE WHO DO NOT KNOW IF THE SOURCES THEY USE ARE LEGAL OR ILLEGAL

As was shown in Figure 3.5 above, 16 % of young people across Europe continue to say that they do not know whether they have used illegal sources to access digital content (albeit this figure is lower than in 2016, when it was 22 %). Young people who are unaware as to whether they are using illegal or legal sources are a little more often female than male, aged between 15 to 17 years of age rather than older, and students or unemployed rather than employed (see Table 3.4 below).

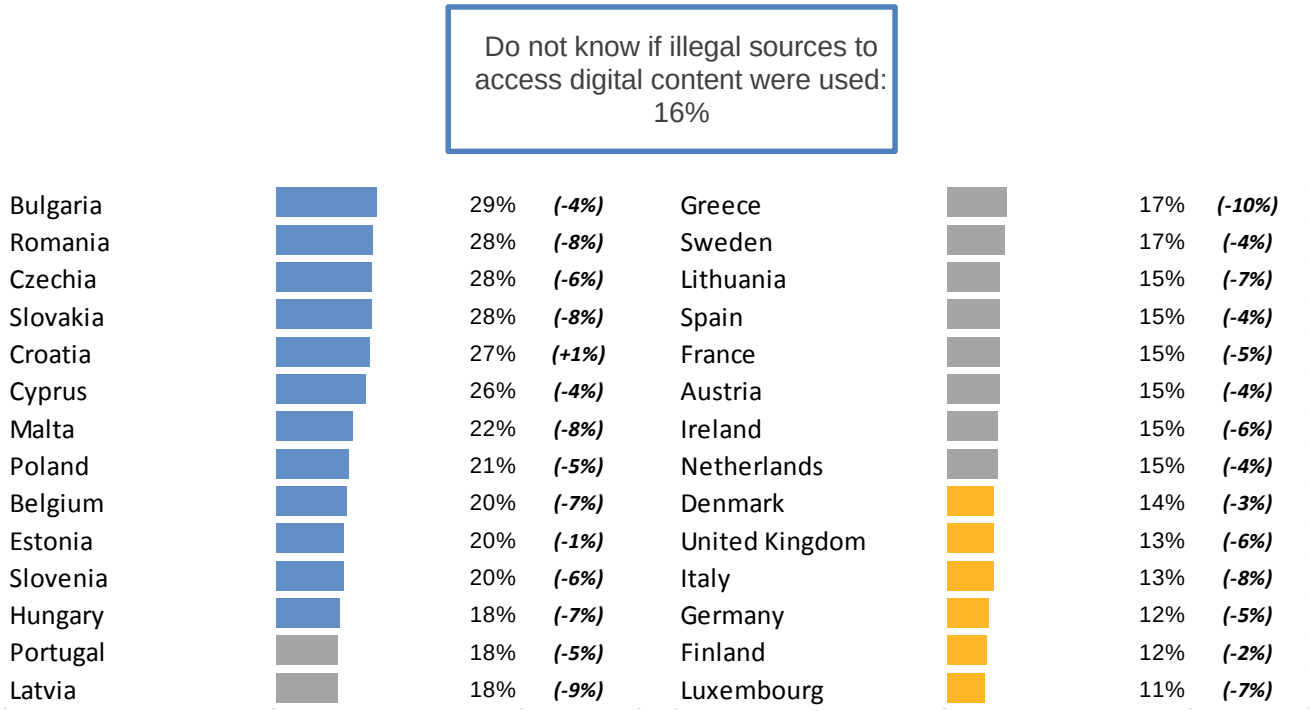
Table 3.4: Young people who do not know whether the sources they use are legal or illegal

Variable	Proportion
Gender	
Male	14 %
Female	18 %
Age	
15-17	18 %
18-21	15 %
22-24	15 %
Education level (undertaking)	
Low (up to lower secondary education)	16 %
Medium (up to higher secondary education/ vocational training)	17 %
High (tertiary education)	15 %
Education level (completed)	
Low (up to lower secondary education)	13 %
Medium (up to higher secondary education/ vocational training)	14 %
High (tertiary education)	13 %
Employment status	
Student	16 %
Employed	12 %
Unemployed	19 %
Income as student	
Income	15 %
No income	18 %

At country level, the proportion of respondents who do not know whether they access digital content illegally is illustrated in Figure 3.14 below. The share of young people who are unaware of the legality of their sources ranges from 11 % in Luxembourg to 29 % in Bulgaria.

In 2016 this range was slightly wider, ranging from 14 % in Finland to 36 % in Romania. The top and bottom five countries have remained roughly the same. Besides Romania, Slovakia, Czechia and Bulgaria, Croatia is now in the top five instead of Malta. The lowest proportions are found in Italy joined by Finland, Denmark, Germany, Luxembourg and the United Kingdom.

Figure 3.14: Proportion of young people who do not know whether they accessed digital content from illegal sources per country



(%) = evolution compared to 2016

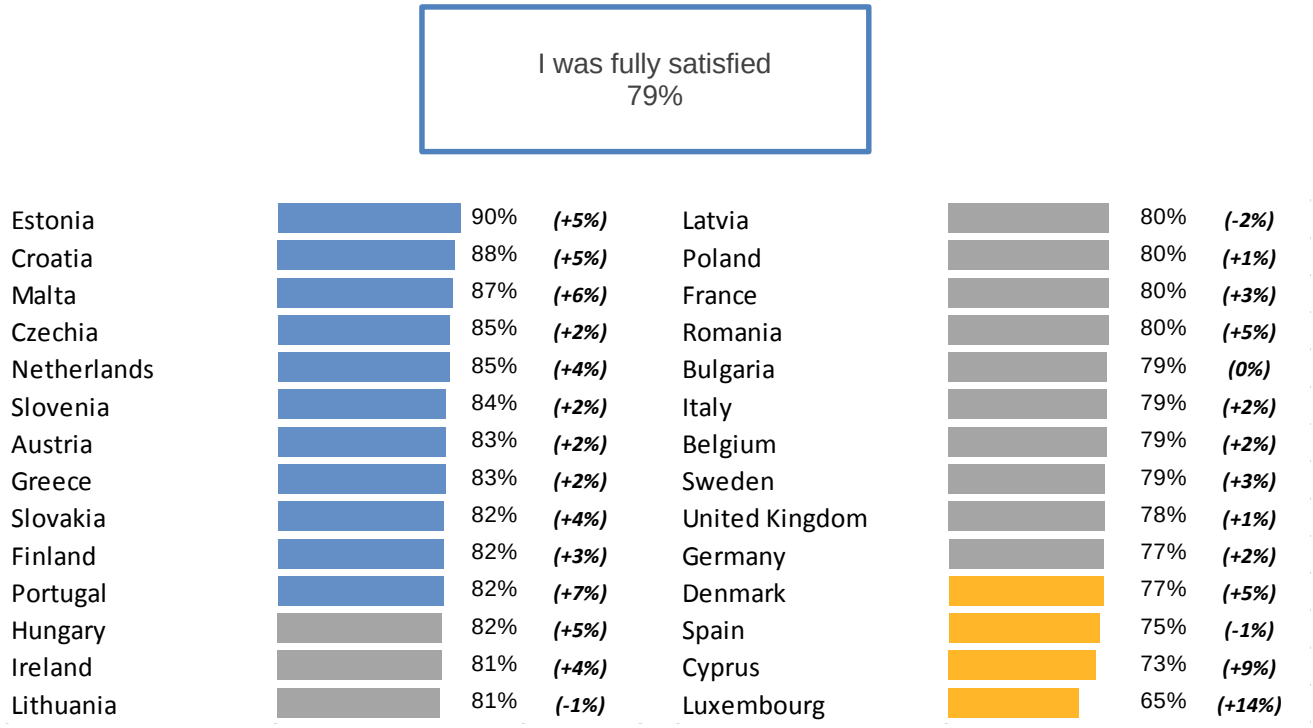
Across Europe, and as in 2016, the majority (84 % in 2019 and 85 % in 2016) of young people who do not know whether they have used illegal sources to access content, feel unable to consistently distinguish between legal and illegal sources.

3.8 EXPERIENCES WHEN ACCESSING DIGITAL CONTENT

As in 2016, most (79 % in 2019 and 77 % in 2016) young people across Europe say that, on at least one occasion, they were fully satisfied with their experiences of accessing digital content.

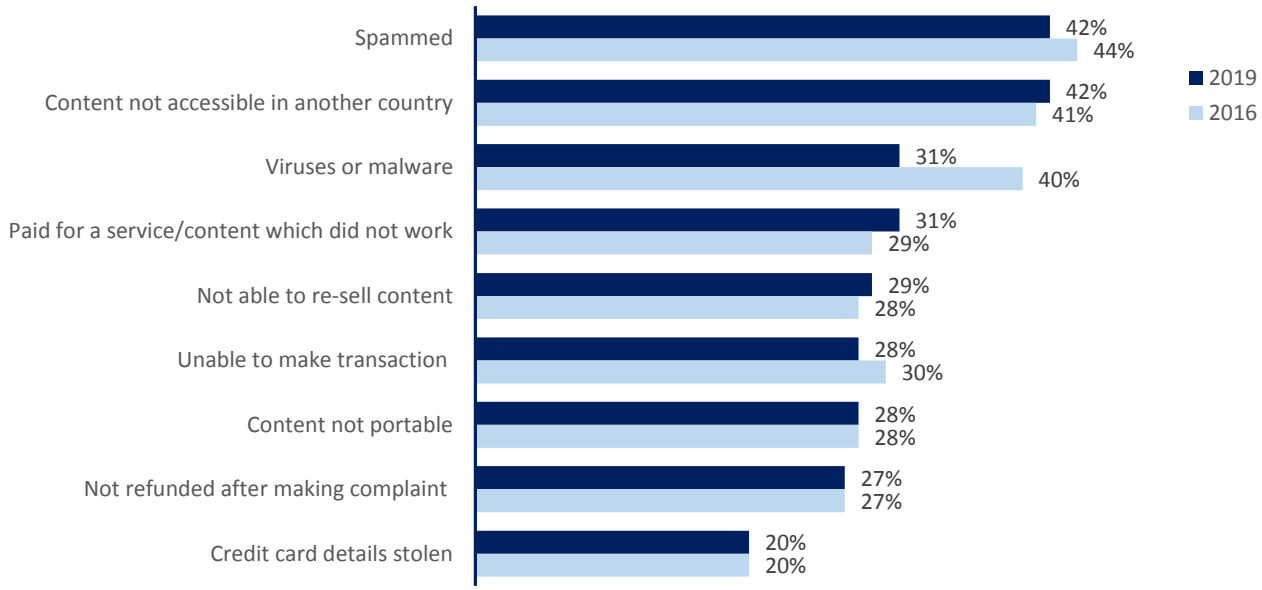
As in 2016, those fully satisfied by their experience form a large majority in Estonia, for example, while almost two in three are fully satisfied in Luxembourg. Compared to 2016, there has been an increase in the proportion of young people that are fully satisfied with their experience of accessing digital content in almost every country, and especially in Luxembourg (although this country still ranks last).

Figure 3.15: Proportion of young people who were fully satisfied at least once when accessing digital content per country



Despite these generally positive results, significant proportions of young Europeans continue to experience problems while accessing online content. The most common problems are spam (42 %); inability to access content in another country (42 %); viruses or malware (31 %); and paying for a service or content that doesn't work (31 %) (see Figure 3.16 below). Since 2016, there has been a decrease in experience of spam and viruses or malware. At the same time, experience of paying for a service or content that does not work has increased slightly.

Figure 3.16: Negative experiences when accessing digital content ([11])



It is instructive to consider the foregoing results broken down by content source — specifically, whether the source was legal, illegal, or the respondents were unsure.

([11]) Source: Question V1.1-V1.10: Has the following ever happened to you when you have used, played, downloaded or streamed content online? (N=23567).

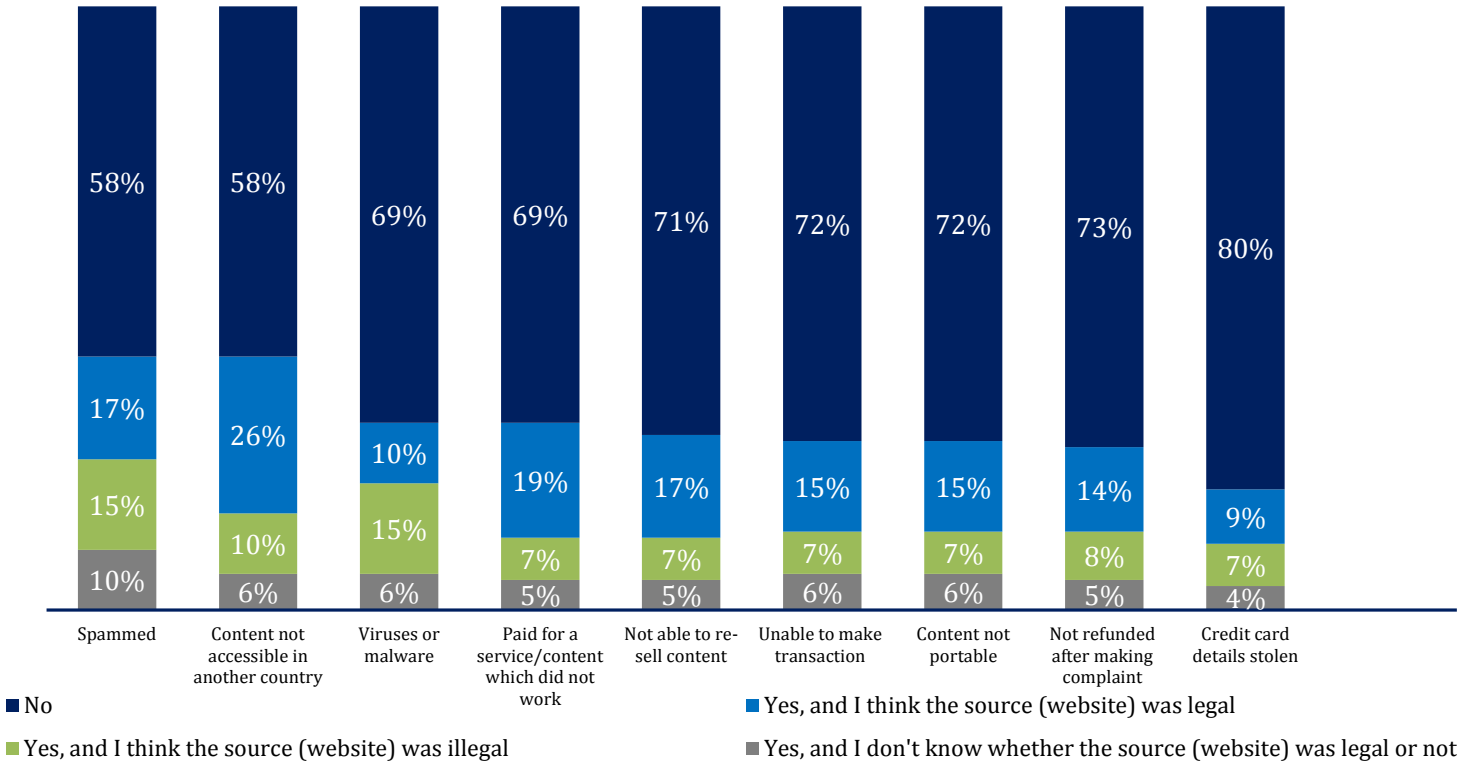
Figure 3.17 below shows that, of those young Europeans who say they have been fully satisfied with the experience of accessing digital content, the majority (71 %) used *legal* sources, while only 16 % used illegal sources. These results are consistent with those for 2016.

Figure 3.17: Satisfaction with experience of accessing digital content — legal or illegal sources ([12])

([12]) Source: Question V1.1-V1.10: Has the following ever happened to you when you have used, played, downloaded or streamed content online? (N=23567).

In terms of experience of problems, this is generally more common among young people who use legal rather than illegal sources, reflecting that young people are more likely to use legal sources. That said, and as in 2016, experience of viruses or malware is more common among those using *illegal* sources than legal sources. Furthermore, experience of spam is almost equally common across the two types of sources (Figure 3.18).

Figure 3.18: Negative experiences when accessing digital content and the legality of sources used ([13])



([13]) Source: Question V1.1-V1.10: Has the following ever happened to you when you have used, played, downloaded or streamed content online? (N=23567).

4. Physical Goods

2019 Intellectual Property and Youth Scoreboard

The overwhelming majority of young Europeans have bought products online in the last 12 months. Although this figure is the same as that recorded in 2016, the proportions buying different categories of product show an almost across-the-board increase.

Product quality and the safety of payment methods remain the key considerations underpinning young Europeans' online purchasing behaviour, followed by the perceived safety of sites, the trustworthiness of vendors, products being original not fake and price. The proportion mentioning site safety has increased since 2016.

A quarter of young people have bought counterfeit physical goods online — 13 % intentionally and 12 % unintentionally — which represents a small overall increase since 2016 of 3 percentage points. Cost remains the main factor motivating such behaviour, although there has been a decrease in the proportion citing cost since 2016.

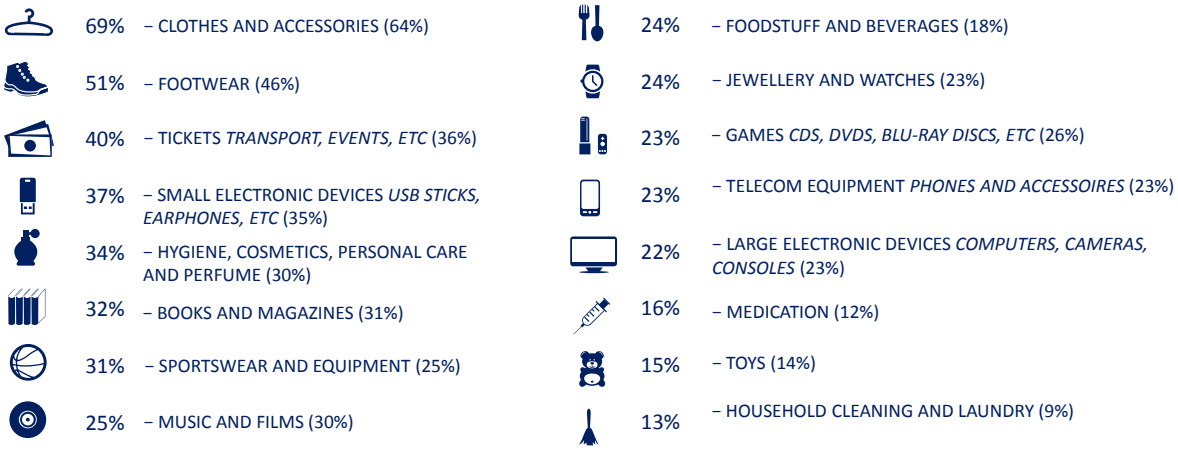
At the same time, most of those who have intentionally purchased counterfeit goods identify factors that would stop them doing so — in particular, more affordable original products, a bad personal or proxy experience and a risk of punishment.

The majority of young people who have bought physical goods from legal sources report satisfaction with the experience. The figure is over four times lower among those who have bought from illegal sources. Negative experiences disproportionately associated with purchasing from illegal sources are the receipt of fake goods, and inconveniencies such as not being able to return goods or complain to the seller. The proportions having experienced such problems are up on 2016.

4.1 PATTERNS IN ONLINE PURCHASING OF PHYSICAL GOODS

The overwhelming majority of young Europeans — 94 % — have bought products online in the last 12 months. Although this figure is almost the same as that recorded in 2016 (when it was 93 %), the proportions who have bought different *categories* of products show an increase almost across the board, as illustrated in Figure 4.1 below. The increase is most marked for sportswear and equipment; other clothes and accessories; footwear; and foodstuffs and beverages. The only product categories for which purchasing has *not* increased are jewellery and watches; telecoms equipment; and music and films. Indeed, in the case of music and films, the 2019 figure is lower than in 2016.

Figure 4.1: Purchase of physical goods online (2016 figures in parentheses) ([14])



([14]) Source: Question II1: Which of the following products have you bought online during the past 12 months? (N=23724).

Table 4.1 below shows how purchasing patterns for the most popular categories of products vary among different subgroups of respondents. As in 2016, clothes, accessories, footwear and tickets are more commonly bought by females than males, while small electronic devices are more commonly bought by males. The results for both genders reflect the upward trend evident in the aggregate results.

For each of the four categories of products in the table, purchasing increases with age and education, and is more common among young people in employment and students (particularly those with an income), than the unemployed.

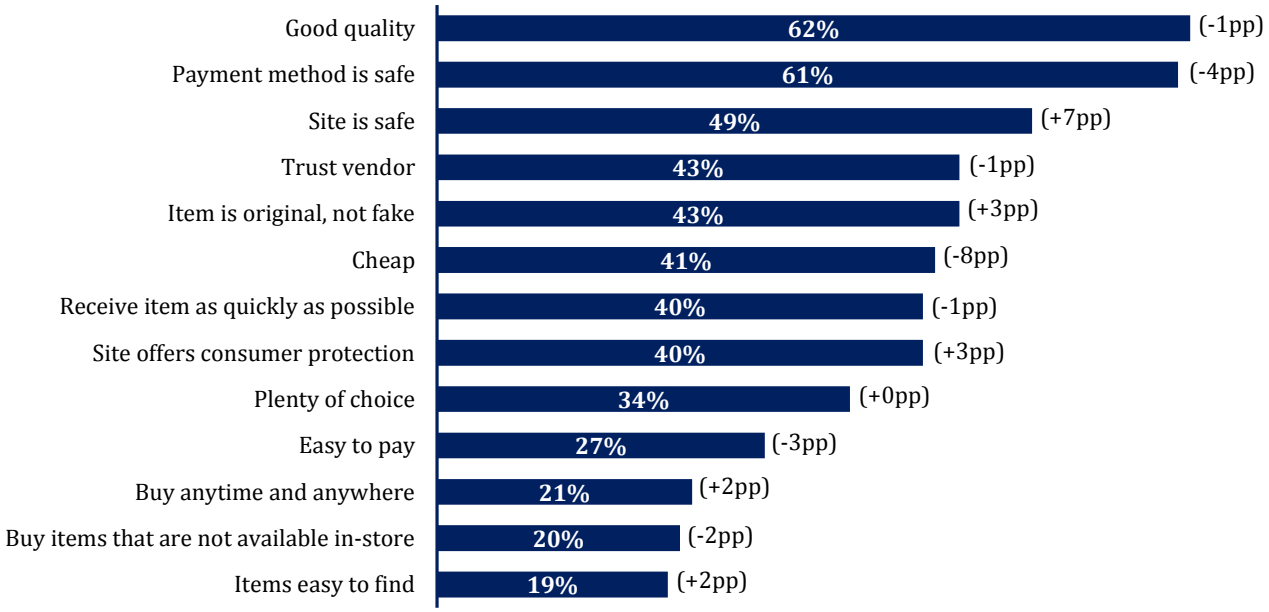
Table 4.1: Purchase of physical goods online by key subgroups

Variable	Clothes & accessories	Footwear	Tickets	Small electronic devices
Gender				
Male	60 %	47 %	34 %	42 %
Female	78 %	55 %	46 %	32 %
Age				
15-17	61 %	46 %	31 %	30 %
18-21	71 %	51 %	41 %	38 %
22-24	73 %	55 %	47 %	42 %
Education level (undertaking)				
Low (up to lower secondary education)	60 %	45 %	25 %	29 %
Medium (up to higher secondary education, vocational training)	67 %	48 %	37 %	35 %
High (tertiary education)	74 %	55 %	54 %	45 %
Education level (completed)				
Low (up to lower secondary education)	62 %	47 %	23 %	26 %
Medium (up to higher secondary education, vocational training)	72 %	56 %	39 %	39 %
High (tertiary education)	74 %	55 %	45 %	39 %
Employment status				
Student	68 %	50 %%	41 %%	37 %
Employed	73 %	57 %	42 %	38 %
Unemployed	63 %	44 %	27 %	32 %
Income as student				
Income	74 %	56 %	46 %	42 %
No income	62 %	44 %	35 %	33 %

4.2 DRIVERS FOR PURCHASING PHYSICAL GOODS ONLINE

The key considerations that continue to influence young Europeans' online purchase of physical goods are product quality (62 %) and the safety of payment methods (61 %), followed by the safety of sites (49 %), the trustworthiness of vendors (43 %), products being original not fake (43 %) and price (41 %). The proportion mentioning site safety — as well as the extent to which sites offer consumer protection — have increased since 2016. The proportion mentioning price and the safety of payment methods have decreased (see Figure 4.2 below).

Figure 4.2: Important considerations when purchasing physical goods online ([15])



As in 2016, females are more likely than males to cite security-related considerations, including the general safety of sites (51 % v 46 % respectively), the safety of payment methods (64 % v 58 %) and the extent to which sites offers consumer protection (43 % versus 37 %). Males are more likely to mention the ease with which items can be found (21 % versus 16 %) and the importance of products being original rather than fake (48 % versus 39 %).

Differences by age are also apparent, with the youngest group (15-17 year olds) more likely than average to place importance on:

- choice (37 % of 15-17 year olds v 32 % of 18-21 year olds and 34 % of 22-24 year olds respectively);
- receiving products quickly (44 % aged 15-17 v 38 % aged 18-21 and 38 % aged 22-24);
- products being original rather than fake (48 % aged 15-17 v 42 % aged 18-21 and 41 % aged 22-24).

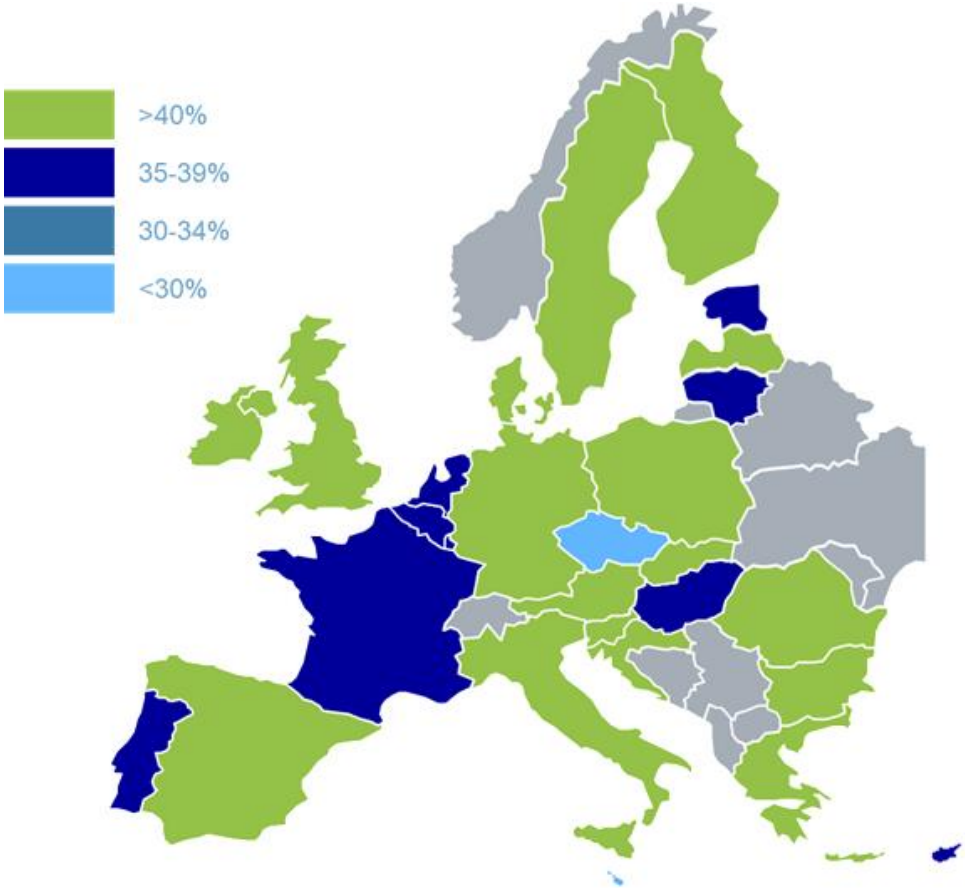
([15]) Source: Question II2: If you want to buy items such as [insert answer categories indicated in II1] online, what is more important to you? Please select 5 things you find most important and rank them in your top 5 (N=21993).

Good quality and safe payment method are the most important factors when buying physical goods online in all countries. Young people in Czechia and Slovakia also attach high importance to choice (58 % and 49 %, respectively), while this is lower in Spain and Greece (both 25 %).

The fact that the site is safe has gained importance in all countries, except in Cyprus and Malta, where choice has become more important. That the item is cheap has become less important in all countries, and especially in Malta (-18 %), Czechia (-16 %) and Slovakia (-16 %).

What is interesting to consider is that 44 % of young Europeans think it is important that the item they purchase is original, not fake. This has become more important in Finland and Cyprus (+15 % and +12 %, respectively), and less important in Malta (-13 %), compared to 2016. The differences across the countries of the EU are illustrated in the Figure 4.3 below.

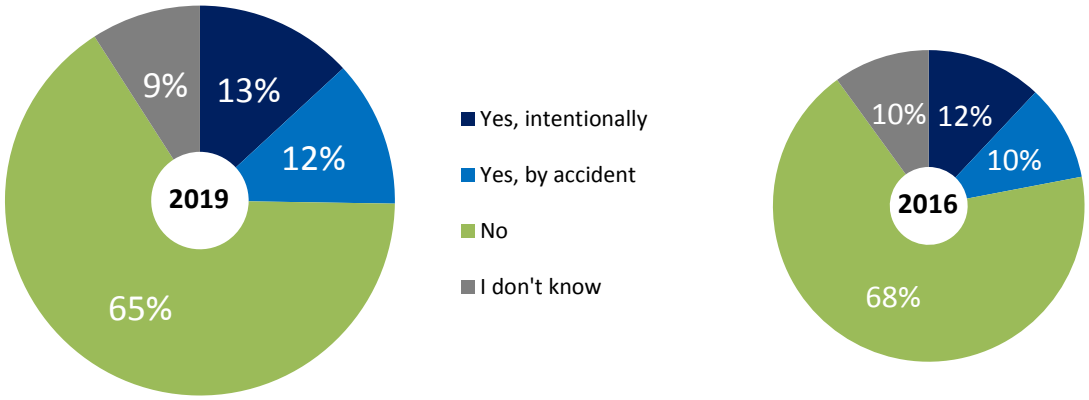
Figure 4.3: Proportion of young people who think that the item they purchase being original, not fake, is important



4.3 PURCHASING COUNTERFEIT PHYSICAL GOODS

A quarter of young people have bought counterfeit physical goods online — 13 % intentionally and 12 % by accident. Thus, overall, there has been a small (3 percentage point) increase in the purchase of counterfeit goods since 2016 (see Figure 4.4 below). One in ten respondents are unsure whether or not they have bought counterfeit physical goods; an almost identical proportion to that recorded in 2016.

Figure 4.4: Purchase of physical counterfeit goods ([16])



([16]) Source: Question III2: During the past 12 months, have you bought a fake product online? (N=21993).

4.4 YOUNG PEOPLE WHO INTENTIONALLY PURCHASE COUNTERFEIT GOODS ONLINE

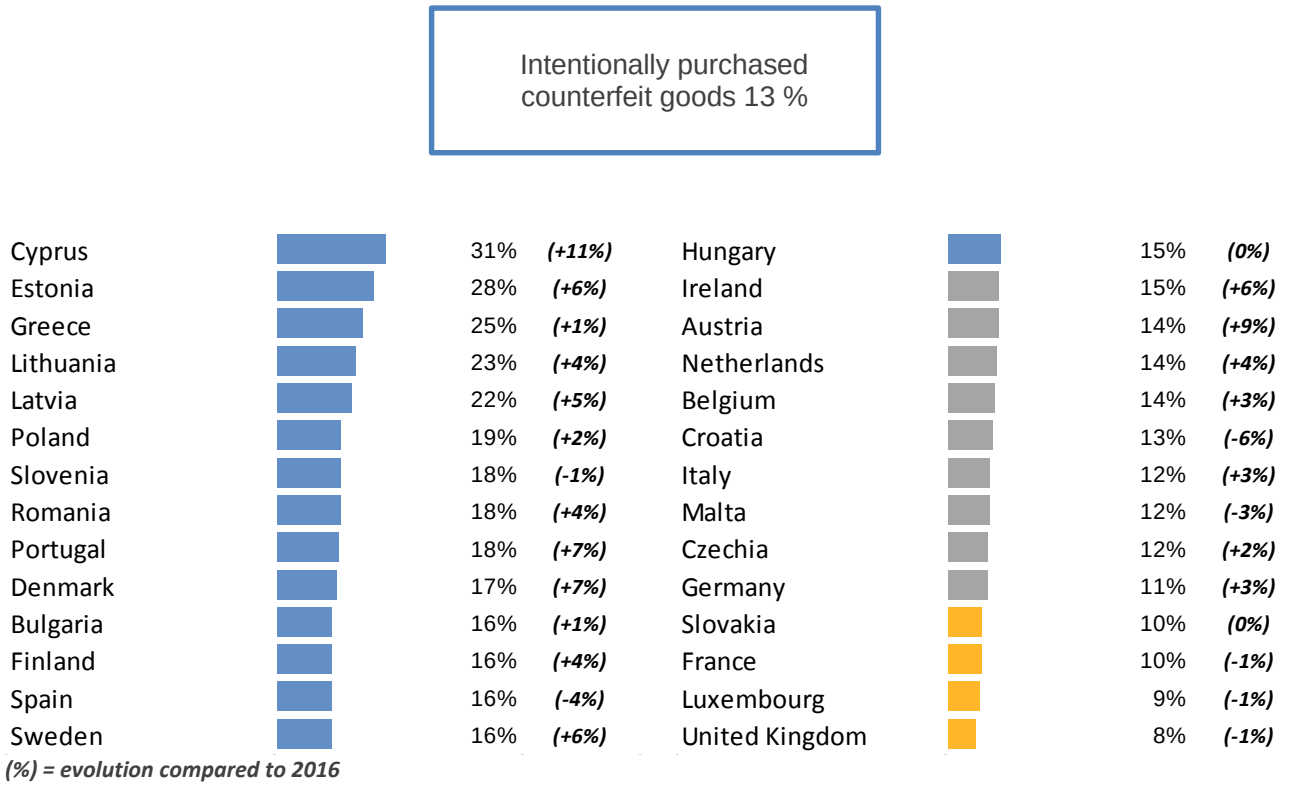
The intentional purchase of counterfeit physical goods is highest among the 18-21 year olds (15 % of category v 10 % of 15-17 year olds and 12 % of 22-24 year olds), young people with some form of income (for example 16 % of students with an income compared to 9 % of those without) and those with a medium level of education (16 % v 11 % of those with the highest level of education). No variation is apparent by gender or employment status, as was the case in 2016.

Table 4.2: Young people who intentionally purchase counterfeit goods

Variable	Proportion who intentionally bought counterfeit goods
Gender	
Male	14 %
Female	12 %
Age	
15-17	10 %
18-21	15 %
22-24	12 %
Education level (undertaking)	
Low (up to lower secondary education)	13 %
Medium (up to higher secondary education/ vocational training)	13 %
High (tertiary education)	13 %
Education level (completed)	
Low (up to lower secondary education)	15 %
Medium (up to higher secondary education/ vocational training)	16 %
High (tertiary education)	11 %
Employment status	
Student	13 %
Employed	14 %
Unemployed	13 %
Income as student	
Income	16 %
No income	9 %

While the EU average indicates that a small minority of young people purchase counterfeit goods, this is not a universal phenomenon across the EU. There are national differences, with more than one-fifth of young people intentionally purchasing counterfeit goods in Cyprus, Estonia, Greece, Lithuania and Latvia (see Figure 4.5 below). In Austria, the proportion of young people intentionally purchasing counterfeit goods almost tripled compared to 2016 (from 5 % in 2016 to 14 % in 2019).

Figure 4.5: Proportion of young people who intentionally purchased counterfeit goods per country

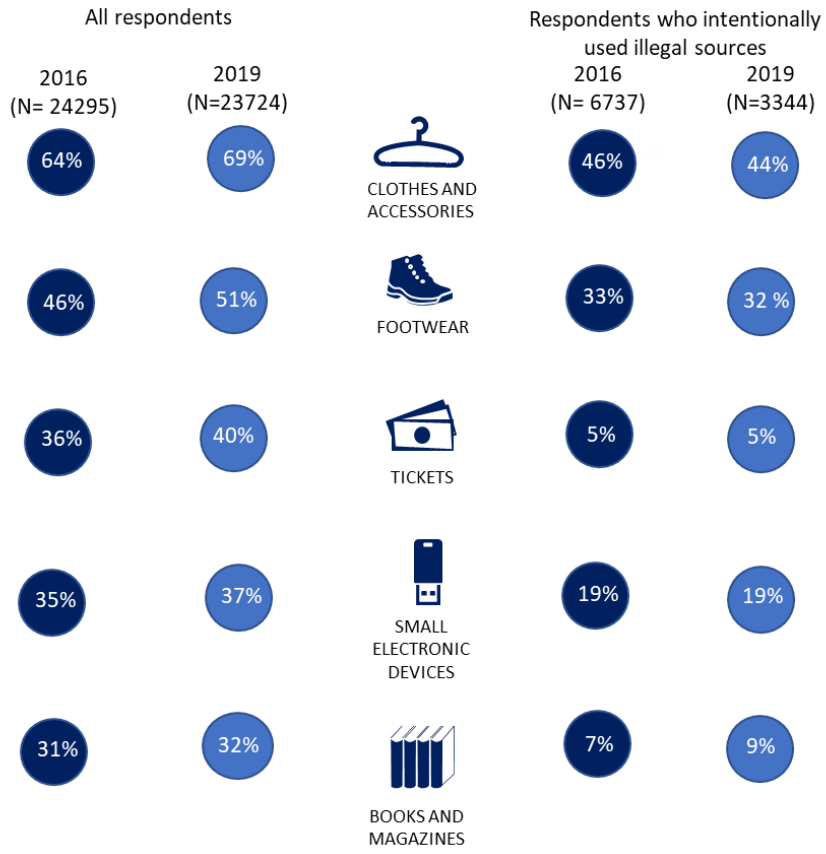


(%) = evolution compared to 2016

4.4.1 TYPES OF COUNTERFEIT PRODUCTS BOUGHT ONLINE

Figure 4.6 below shows the top five categories of goods purchased online by young people in general, alongside the proportions intentionally buying these goods in counterfeit form. The most commonly purchased counterfeit goods continue to be clothes and accessories, and footwear. Other categories, including electronic devices, tickets, books and magazines are purchased comparatively infrequently. These results show no significant change on 2016.

Figure 4.6: Purchase of physical goods in general and intentional purchase of counterfeit goods ([17])



4.4.2 REASONS TO BUY COUNTERFEIT GOODS

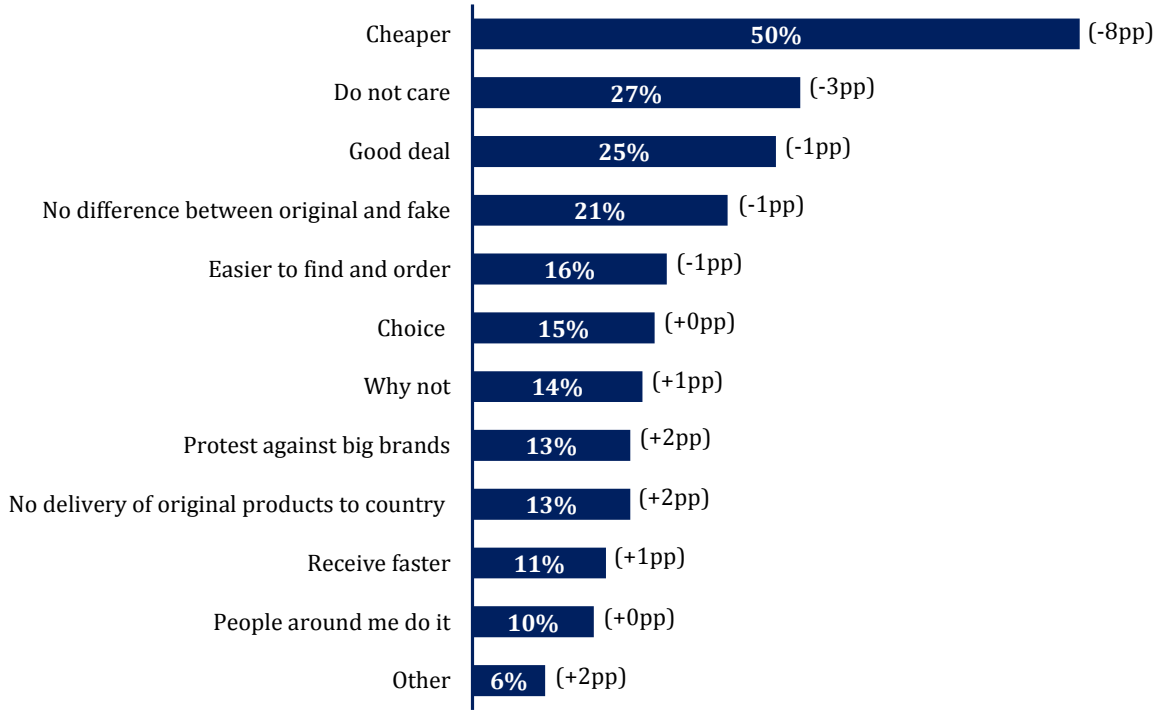
As with the purchase of illegal digital content, cost remains the main factor motivating the intentional purchase of counterfeit physical goods. Other factors cited by at least one in five of those concerned are simply not caring if products are fake and a belief that there is no difference between real and fake products. While this rank ordering of factors reflects that from 2016, there has been a decrease in the proportion citing cost.

([17]) Source: Question II1: Which of the following products have you bought online during the past 12 months? (N=23724) and III3: Which type of fake product(s) did you buy online? Please indicate all that apply (N=3344).

Cost is more commonly cited by females than males (54 % v 47 %), as was the case in 2016, and by those with a high level of education than a medium or low level (55 % v 45 % medium and 38 % low). There are no differences by employment status but students with an income mention cost more often than those without (55 % v 49 %).

Indifference to buying counterfeit goods is similarly more common among females than males (31 % v 24 %), which, again, mirrors the 2016 findings, while the perception that counterfeit goods represent a good deal is more common among those with a high rather than a medium or low level of education (28 % v 20 % and 18 %, respectively).

Figure 4.7: Drivers of intentional purchase of counterfeit products ([18])

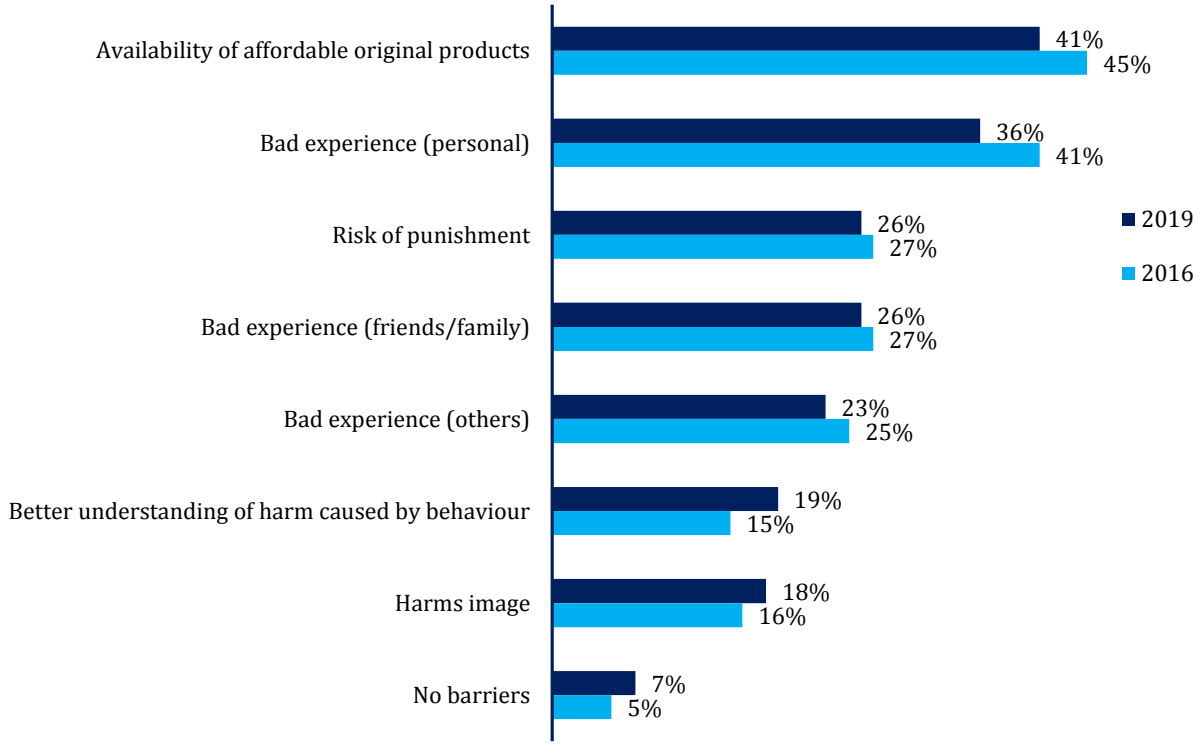


([18]) Source: Question III4: You indicated that you have intentionally bought a fake product online during the past 12 months. What was the reason for this? Please indicate all that apply (N=3344).

4.4.3 REASONS TO STOP BUYING COUNTERFEIT GOODS

Fewer than one in ten of those who have intentionally bought counterfeit physical goods say nothing would stop them from doing this again. For the majority, more affordable original products, a bad personal or proxy experience and a risk of punishment would have an impact. These findings show little change on 2016, notwithstanding a small decrease in the proportion citing a negative personal experience and a small increase in the proportion citing more affordable original products (see Figure 4.8 below).

Figure 4.8: Factors that would make young people stop purchasing counterfeit goods ([19])



As in 2016, and reflecting findings described elsewhere in this report, more females than males cite a risk of punishment (31 % v 21 %) and a negative personal experience (41 % v 32 %) as factors that would stop them purchasing counterfeit physical goods.

Meanwhile, more students than those working or unemployed cite the availability of more affordable original products (43 % v 36 % and 33 %, respectively), with the figure rising further among students without an income (46 % v 42 % of those with an income).

4.5 YOUNG PEOPLE WHO DO NOT INTENTIONALLY BUY COUNTERFEIT GOODS

Young people who do not intentionally buy counterfeit goods include those who have not bought such goods *at all* in the last 12 months and those who have done so *by accident*. Almost two-thirds of young

([19]) Source: Question III5: You indicated that you have intentionally bought a fake product online during the past 12 months. What would make you stop buying a fake product? Please indicate all that apply (N=3344).

people fall into the former category. As in 2016, this group are more often female than male, and students rather than in employment. Furthermore, within the student category, the percentage of those who do not purchase counterfeit goods is higher among those without an income than those with an income. Age emerges as another significant factor, unlike in 2016, with 15-18 year olds showing greater propensity to not buy counterfeit goods than those aged 18 or over (see Table 4.3 below).

Young people who have bought counterfeit goods *by accident,*—12 % of the sample overall — show the opposite profile in comparison to those that have not bought such goods at all: They are a little more likely to be male than female (14 % v 11 %), in employment rather than students (15 % v 12 %) and 18 or over (13 % of those aged 22-24 and 18-21, versus 10 % of those aged 15-17).

The proportion of those who unintentionally purchased counterfeit goods ranges from 4 % in Malta to 22 % in Bulgaria. This proportion increased in most countries compared to 2016, especially in Finland and Ireland, where it more than doubled.

Table 4.3: Young people who do not intentionally buy counterfeit goods

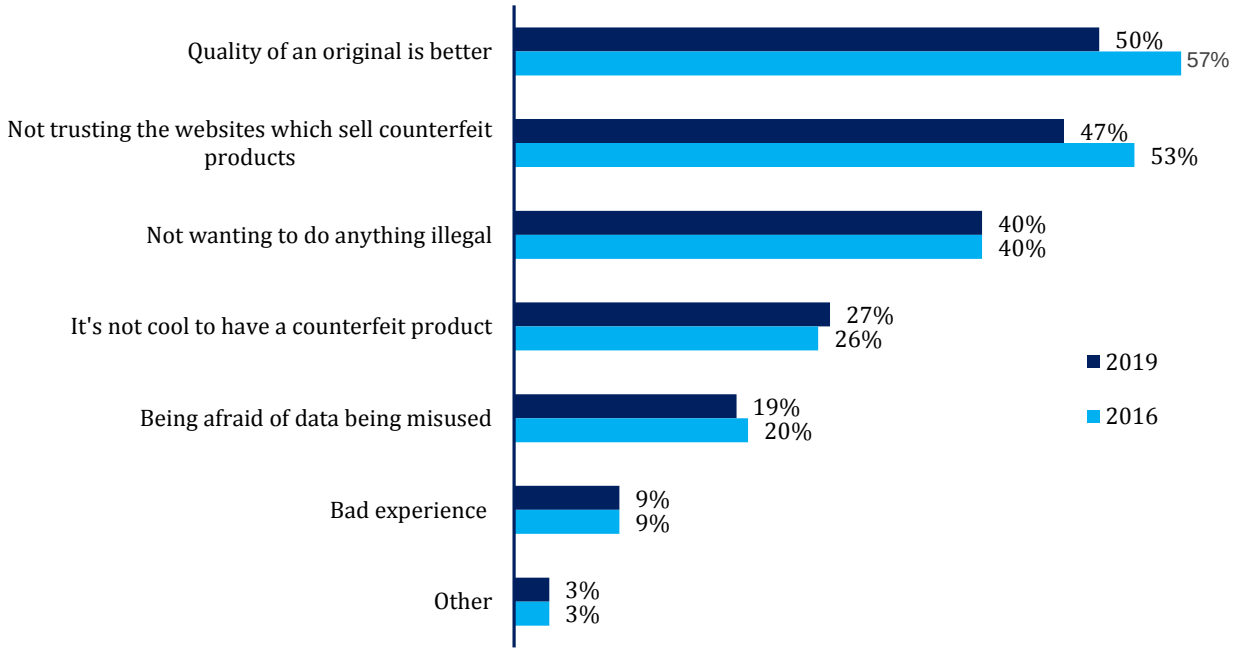
Variable	Proportion of those who have not bought counterfeit goods	Proportion of those who accidentally bought counterfeit goods
Gender		
Male	63 %	14 %
Female	67 %	11 %
Age		
15-17	69 %	10 %
18-21	62 %	13 %
22-24	66 %	13 %
Education level (undertaking)		
Low (up to lower secondary education)	64 %	13 %
Medium (up to higher secondary education, vocational training)	65 %	12 %
High (tertiary education)	69 %	11 %
Education level (completed)		
Low (up to lower secondary education)	54 %	19 %
Medium (up to higher secondary education, vocational training)	61 %	14 %
High (tertiary education)	66 %	16 %
Employment status		
Student	66 %	12 %
Employed	63 %	15 %
Unemployed	58 %	14 %
Income as student		
Income	60 %	15 %

No income	73 %	8 %

The main reasons some young people refrain from intentionally purchasing counterfeit goods are that they think the quality of original products is better, they distrust websites that sell counterfeit goods and they do not want to do anything illegal. As Figure 4.9 below shows, the proportions mentioning product quality and distrust of websites have both decreased since 2016.

Reflecting the results for illegal *digital content*, more females than males distrust websites that sell counterfeit products (50 % v 44 %) and express an aversion to doing anything illegal (42 % v 38 %). Distrust of websites is also more common among those with a medium or high level of education than those with a low level (45 % and 48 % v 35 %, respectively), while an aversion to doing anything illegal is a little more common among 15-17 year olds than those aged 18 or over (44 % v 38 % of 18-21 year olds and 39 % of 22-24 year olds).

Figure 4.9: Reasons for refraining from purchasing counterfeit goods ([20]



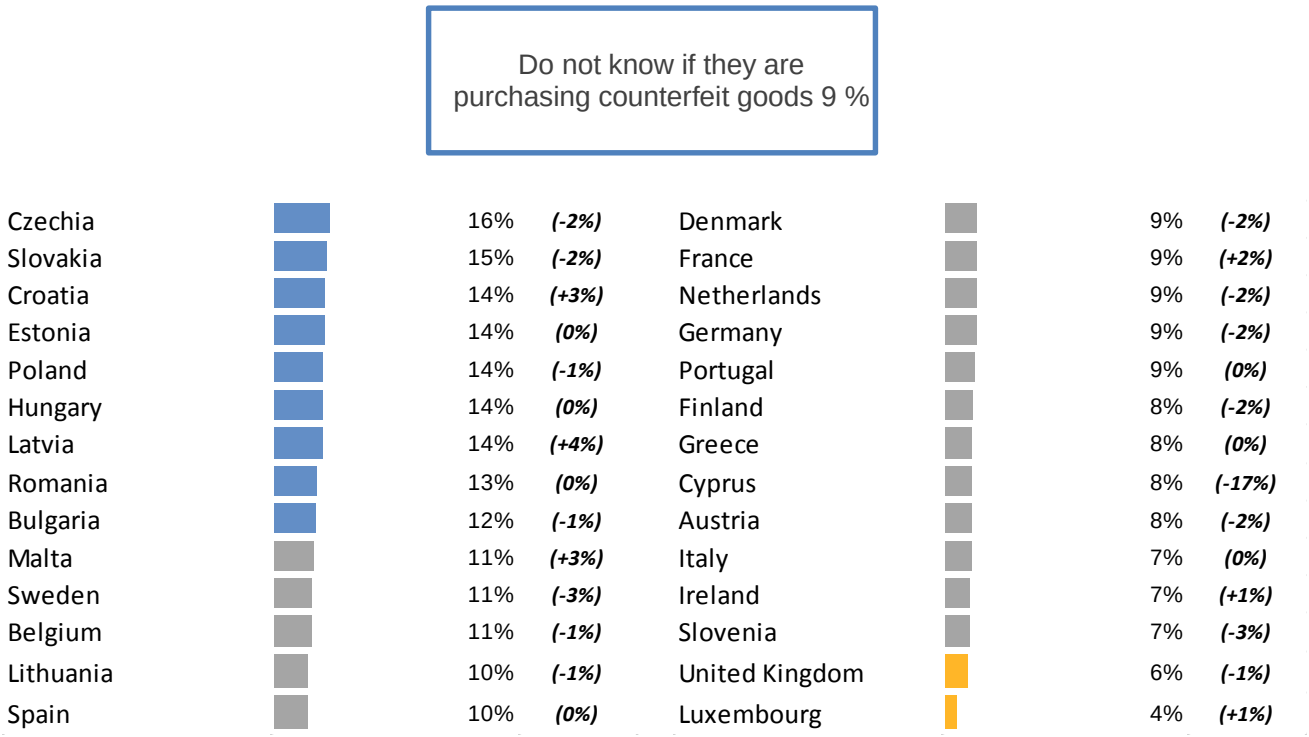
([20]) Source: Question III6: You indicated that you have not intentionally bought a fake product online during the past 12 months. What was the reason for this? Please indicate all that apply (N=16387).

4.6 YOUNG PEOPLE WHO DO NOT KNOW IF THEY ARE PURCHASING COUNTERFEIT GOOD

Almost one in ten young Europeans (as was the case in 2016) are unsure as to whether or not they have bought counterfeit goods, as illustrated in Figure 4.4 above. As in 2016, this group is a little more likely to be female than male (11 % v 8 %), and to have a low or medium level of education than a high level (12 % and 10 % v 7 %).

At country level, the proportions of respondents who do not know whether they purchased counterfeit goods ranges from 4 % in Luxembourg, to 6 % in the United Kingdom and 16 % in Czechia.

Figure 4.10: Proportion of young people who do not know if they are purchasing counterfeit goods by country



Almost two-thirds (63 %) of young people who do not know whether they have bought counterfeit goods say this is because they cannot tell the difference between real and fake products. Almost one-third (31 %) say it is because they simply do not care whether a product is real or fake. The latter figure has decreased a little since 2016, by 4 percentage points.

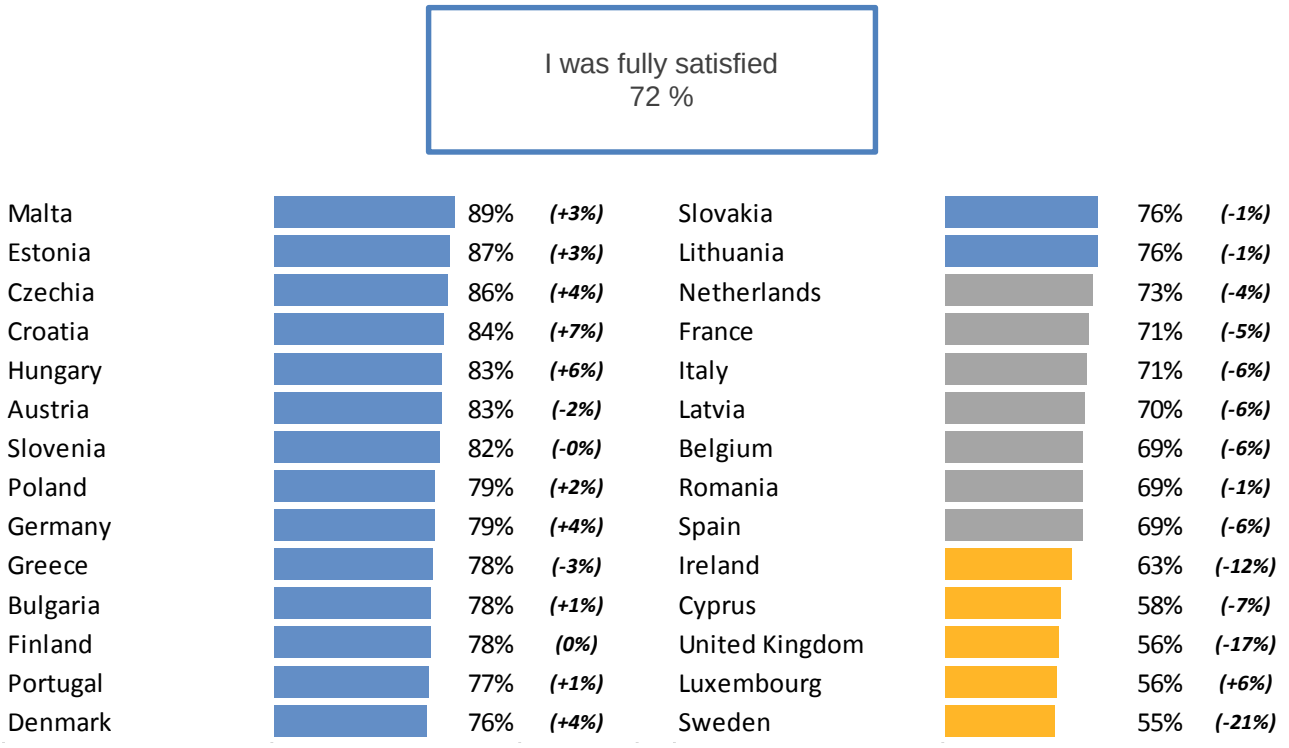
When asked why they do not know whether they have bought a fake product online, the youngest group of respondents is more likely than the average to say they have difficulty distinguishing between real and fake products (68 % of 15-17 year olds, compared to 60 % of 18-21 year olds and 62 % of 22-24 year olds). Among those who say they do not know whether they bought a fake product or not because they do not care is more common among older age cohorts (34% of 18-21 year olds and 32% of 22-24 year olds, compared to 25% of 15-17 year olds).

4.7 EXPERIENCES WHEN PURCHASING PHYSICAL GOODS ONLINE

As for online digital content, most young people — 72 % — report being completely satisfied with their experiences of purchasing goods online. That said, the figure has decreased somewhat since 2016, from 77 %.

Those who were satisfied with at least one online purchase of physical goods form a large majority of more than 80 % in Malta, Estonia, Czechia, Croatia, Hungary and Austria and Slovenia. However, satisfaction was significantly lower in Sweden, Luxembourg and the United Kingdom (55 %, 56 % and 56 %, respectively). Compared to 2016, we see some shifts in the ranking, more specifically at the bottom of the ranking (e.g. in Sweden and the United Kingdom roughly three in four were fully satisfied in 2016, whereas in 2019 this is only 55 % and 56 %, respectively).

Figure 4.11: Proportion of young people who are fully satisfied when purchasing goods online per country



Despite generally high levels of satisfaction, most young people report having experienced problems when purchasing goods online. The most common such problem, mentioned by more than half (55 %), is goods arriving much later than indicated or being of lower-than-expected quality (54 %).

Other commonly experienced problems, mentioned by around one-third, are goods not arriving at all (35 %), or being different to what was ordered (30 %), and not having the option to return goods (30 %).

Around a quarter of young people report having experienced other problems; such as, goods being stopped at customs (26 %), goods breaking and not being repairable under warranty (26 %) and not being able to make a complaint to sellers (26 %). A similar proportion (21 %) report that goods they have purchased were fake.

Young people's self-reported experiences of purchasing physical goods online also varies significantly depending on whether the sources of the goods were legal or illegal: Whereas almost three-quarters (72 %) of those who have bought from legal sources report satisfaction, the figure is more than four times lower (16 %) among those who have bought from illegal sources. Still, and as Figure 4.12 below shows, there has been some shift in these figures since 2016, towards lower satisfaction with legal sources and higher satisfaction with illegal ones.

Figure 4.12: Satisfaction with purchasing physical goods online — legal or illegal sources ([21])

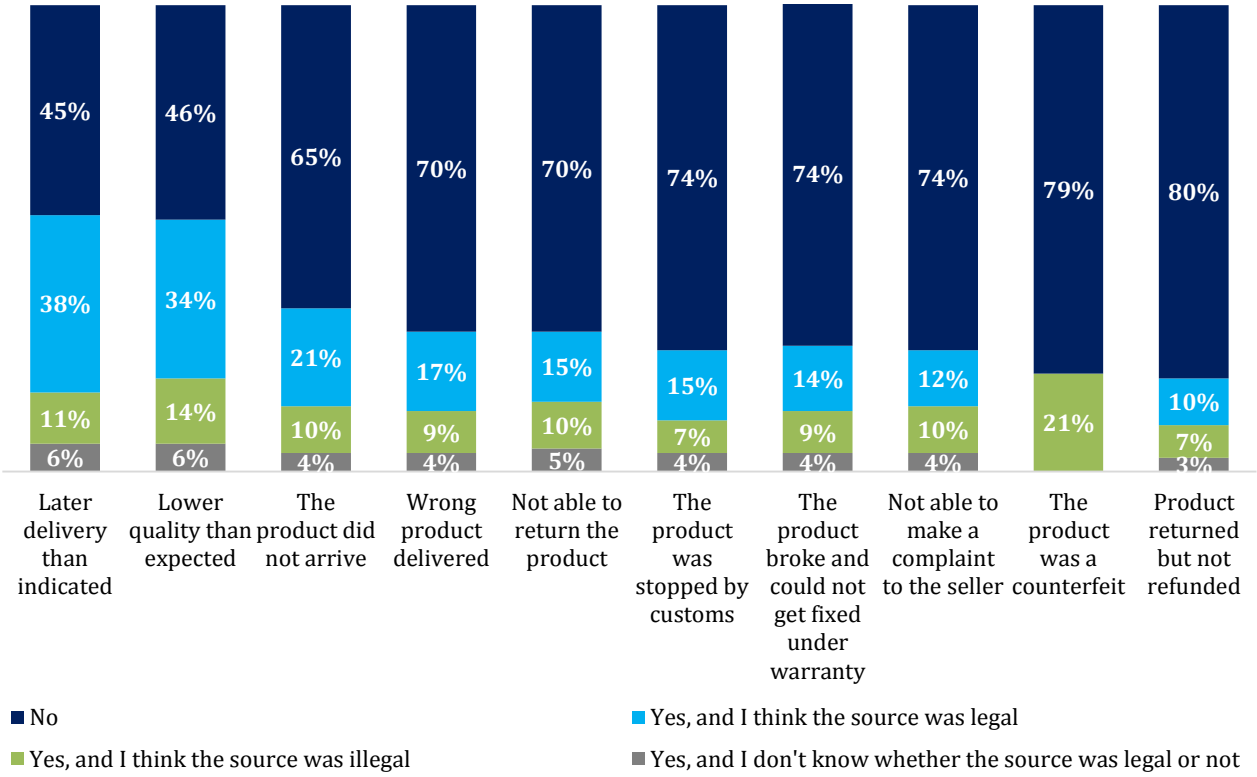
Figure 4.13 below shows, young people's experiences of problems when buying physical goods online are broken down by whether the source was legal or illegal. Reflecting that most goods are purchased from legal sources, the bulk of problems reported are also associated with these sources. The exception is in the case of goods being fake, which is associated with **illegal sources only**.

Other problems that are disproportionately associated with illegal sources are inconveniencies, such as not being able to return the goods, the goods breaking and not being repairable under warranty, not being able to complain to sellers and goods being returned but not refunded.

While this ranking of problems reflects the ranking uncovered in 2016, the absolute proportions reporting having experienced such problems when purchasing from **illegal sources** have generally increased. In particular, the proportions who have received goods of lower-than-expected quality is up by 6 percentage points, and the proportions who have experienced late or non-delivery of goods are each up by 5 percentage points.

([21]) Source: Question V2.1-2.11: Did the following already happen to you when you bought a product online such as [insert answer categories indicated in II1]? (N=21993).

Figure 4.13: Negative experiences when purchasing physical goods online — legal or illegal sources ([22])



([22]) Source: Question V2.1-2.11: Did the following already happen to you when you bought a product online such as [insert answer categories indicated in II1]? (N=21993).

5. Distinguishing Between Legal and Illegal Sources to Access Digital Content or Purchase Physical Goods

Most young people across Europe check the legality of potential sources of digital content — indeed, the proportion doing this has increased compared to 2016. The most commonly performed check by some way is searching the internet for reviews, comments or opinions.

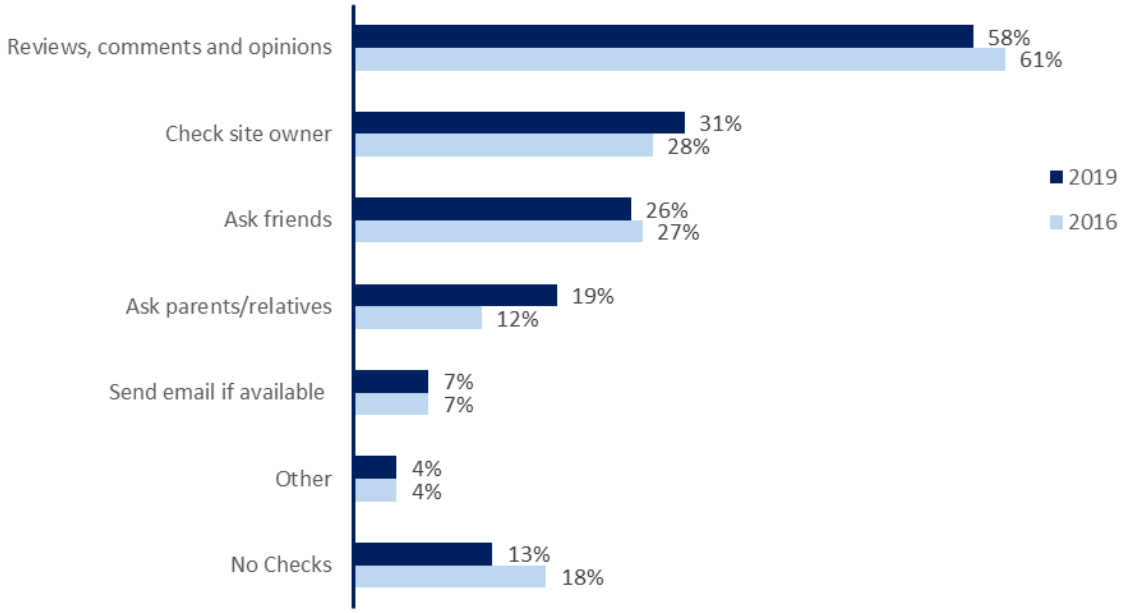
Just over half of young people generally feel able to identify illegal sources offering digital content and this figure too has increased since 2016. Fewer — around one-third — feel able to identify illegal sources of physical goods, which was the same proportion in 2016.

5.1 MEANS OF CHECKING THE LEGALITY OF SOURCES

There are various ways young people can check the legality of sources from which they are considering purchasing digital content or physical goods. Most young people across Europe say they perform at least one such check. The numbers of young people performing at least one check has increased since 2016 (82 % in 2016 compared to 87 % in 2019), indicating that young people are checking the legality of their sources more commonly. The most common check performed by quite a margin is searching the internet for reviews, comments or opinions (58 %). The next most common are checking the site owner (31 %), asking friends (26 %), or asking parents or relatives (19 %).

Thirteen per cent of young people perform no checks at all. However, this figure has decreased since 2016, by 5 percentage points, while the proportions checking the site owners, or asking parents or relatives have increased.

Figure 5.1: Ways of checking the legality of sources ([23])



As in the previous survey, there are some notable gender- and age-based differences in the results: males are more likely than females to indicate they check site owners (34 % v 27 %, respectively), while females are more likely to look for reviews, comments and opinions (57 % v 60 %), or ask their parents or relatives (20 % v 17 %).

In terms of age-based differences, 15-17 year olds are more likely than those aged 18 or over to rely on the advice of friends (30 % v 25 % of 18-21 year olds and 23 % of 22-24 year olds) or parents or relatives (36 % v 13 % of 18-21 year olds and 10 % of 22-24 year olds).

Meanwhile, the propensity to perform *no* checks on the legality of sources is higher than average among those with the lowest level of education (16 % v 13 % on average) and, among the unemployed (19 % v 13 % on average).

There is considerable variation between countries for the proportion of young people who do not check the legality of their sources. Over one in five young people in Cyprus (26 %), Belgium (22 %), Slovakia (20 %) and Croatia (20 %) do no checking, while in Luxembourg (6 %), Greece (7 %), Romania (8 %), Italy (8 %) and Finland (8 %) this proportion is a less than one in ten.

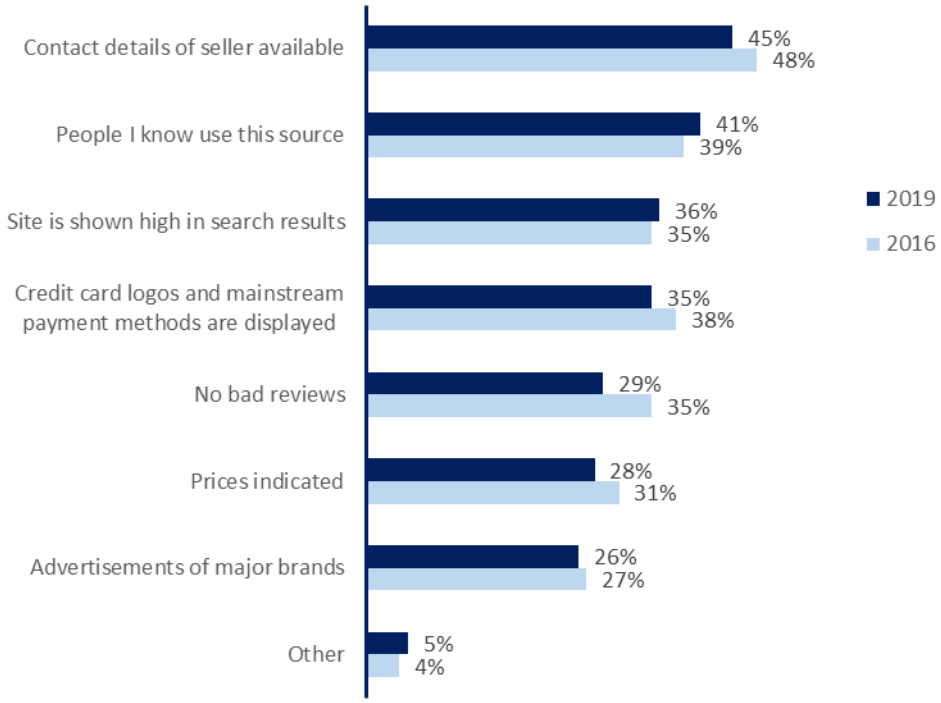
([23]) Source: Question IV9: How do you check if a source (website) that offers products or digital content online is legal or illegal? (N=23650).

5.2 FACTORS INFLUENCING THE PERCEIVED LEGALITY OF SOURCES

Young people draw on a range of indicators when forming judgements about the legality of sources of digital content and physical goods. As Figure 5.2 below shows, the lead factor, mentioned by just under half (45 %), is whether contact details for the seller are available. This is followed by knowing others who use the source (41 %); whether the site ranks highly in search results (36 %); whether credit card logos and mainstream payment details are displayed (35 %); and an absence of negative reviews (29%).

This ranking of indicators differs slightly to that uncovered in 2016, reflecting a decrease in the proportion of young people citing the availability of sellers' contact details (of 3 percentage points); the display of credit card logos and mainstream payment methods (3 percentage points); and an absence of negative reviews (6 percentage points).

Figure 5.2: Factors influencing the perceived legality of sources ([24])



Females are more likely than males to use the availability of sellers' contact details (47 % v 44 %), and knowing people who use the source (44 % v 39 %).

The youngest age group similarly place higher-than-average emphasis on knowing others who use particular sources (47 % v 40 % of 18-21 year olds and 38 % of those aged 22-24). At the same time, they are less likely than those aged 18 or over to reference 'harder' indicators, including the availability of sellers' contact details (41 % v 46 % of 18-21 year olds and 48 % of those aged 22-24) and the presence of credit card logos or mainstream payment methods (31 % v 36 % and 37 % respectively).

([24]) Source: Question IV10: What makes you think that a source (website) that offers products or digital content online is legal? (N=23650).

Between countries, the indicators used to decide whether a website that offers products or digital content online and legally is likely to vary. The availability of contact details and knowing people who use the source are the most commonly mentioned factors everywhere, except for Cyprus. In Cyprus the main indicator (by far) that a source is legal, is that no bad reviews of the site can be found (57 %). The proportion believing a source is legal when it is displayed high in search results is highest in Estonia (56 %). Displaying the payment method with logos induces trust that the source is legal for most young people in Finland (52 %) and Estonia (51 %). This is less often the case in Cyprus (18 %). The proportion of young people who assume the presence of prices on the site points to the legality of the source ranges from only 10 % in Cyprus to 48 % in Finland. The proportion of young people assuming a source is legal when there are advertisements of major brands on the site ranges from 15 % in Cyprus to 45 % in Luxembourg.

5.3 CONFIDENCE IN IDENTIFYING ILLEGAL SOURCES

Just over half (55 %) of young people say they generally feel able to identify illegal sources of digital content. Fewer — 39 % — feel able to identify illegal sources of *physical* goods. Still, both figures represent a small improvement on the results for 2016, of 4 and 3 percentage points respectively (see Figure 5.3 below).

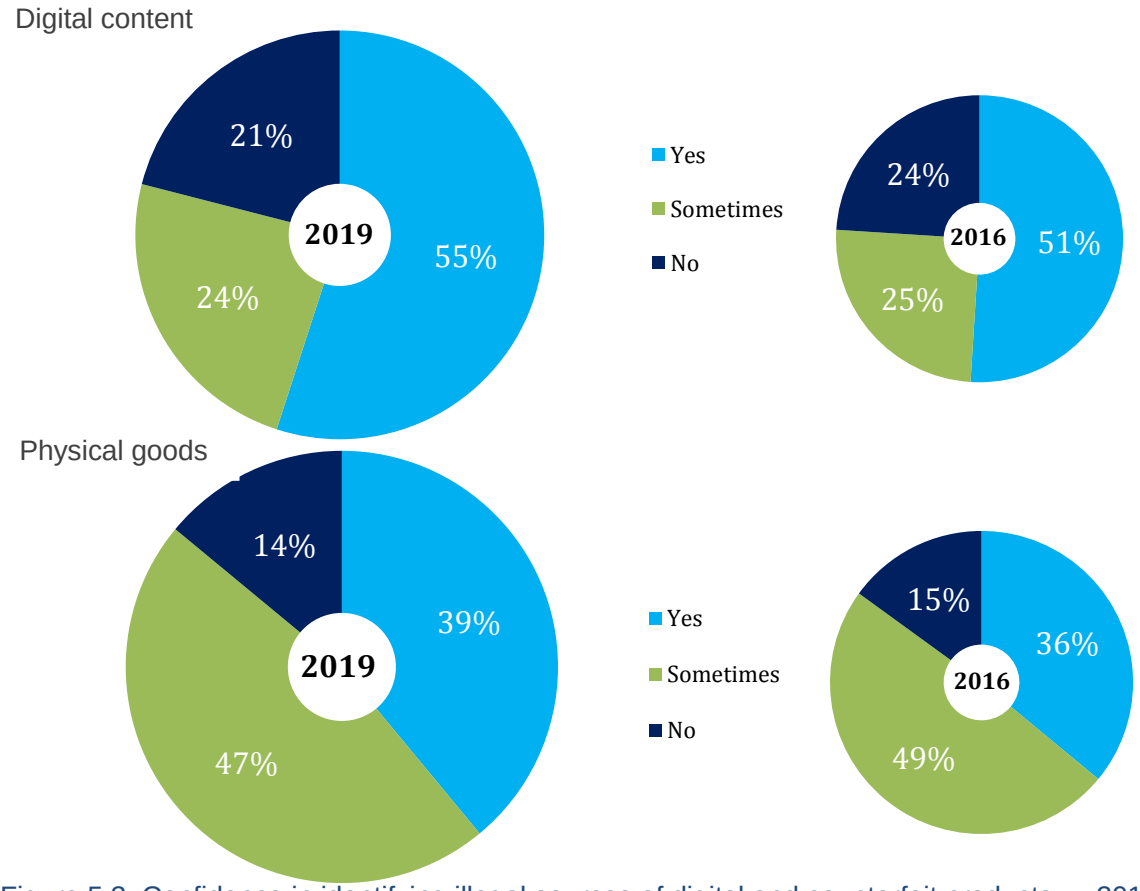


Figure 5.3: Confidence in identifying illegal sources of digital and counterfeit products — 2016 & 2019 ([25])

As was the case in 2016, a significantly higher proportion of males than females express confidence in their ability to identify illegal sources of both digital content and physical goods; and a higher proportion of those aged 18 and over than younger do so. There is further variation by education, with the most educated expressing greater confidence than the least educated in their ability to identify illegal sources.

At country level, the perceived ability of young people to judge the legality of a source is highest in Finland (54 %), Sweden and Luxembourg (both 48 %), and lowest in Czechia (25 %). Compared to 2016, the top and bottom countries remained roughly the same. Overall, young people more often claim they are able to judge the legality of a source. This positive evolution is most outspoken in Denmark (+13 %), Estonia (+10 %) and Greece (+9 %).

Table 5.1: Confidence in identifying illegal sources of digital content and physical goods

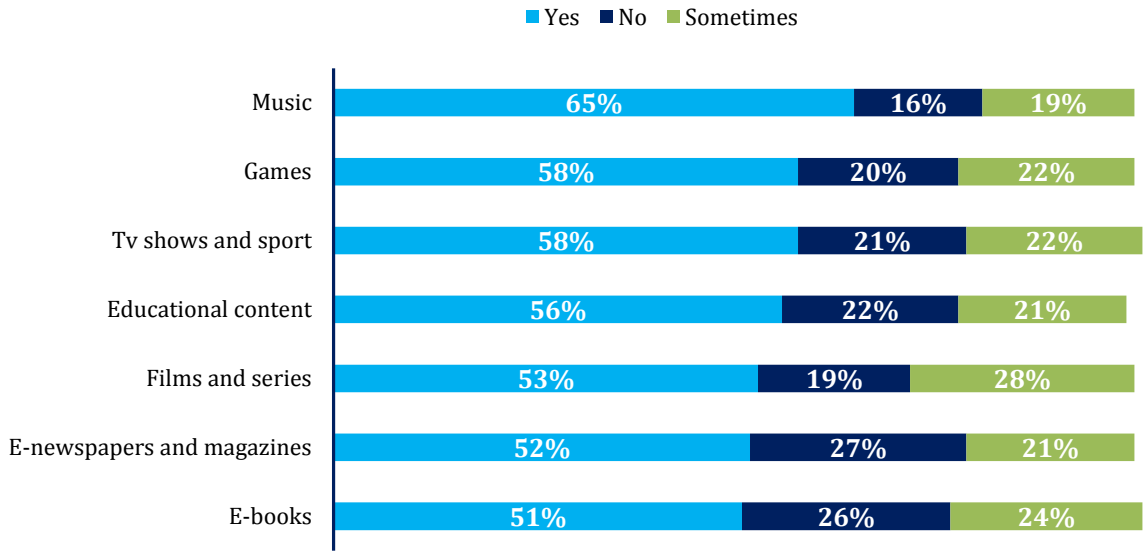
([25]) Source Digital content: Question IV1.1–1.8: When you look for content online do you know whether the source (website) you use for using, playing, downloading or streaming provides you the content legally or illegally? (N=18871).
Source Physical goods: Question III1: Can you tell the difference between a website that sells only genuine (=real) products and a website that sells fake products or a mix of genuine and fake products? (N=23724).

Variable	Digital content		Physical goods	
	Yes	No	Yes	No
Gender				
Male	57 %	22 %	46 %	13 %
Female	53 %	21 %	31 %	15 %
Age				
15-17	51 %	21 %	30 %	16 %
18-21	57 %	22 %	42 %	14 %
21-22	56 %	21 %	42 %	13 %
Education level (completed)				
Low (up to lower secondary education)	52 %	24 %	40 %	24 %
Medium (up to higher secondary/vocational training)	54 %	21 %	39 %	16 %
High (tertiary education)	60 %	18 %	45 %	14 %

Notwithstanding these results, young people's views on their ability to determine the legality of sources of *digital* content continues to vary depending on the specific type of content under consideration. They generally feel more able to determine the legality of music (65 %), games (58 %), TV shows and sports (58 %), and educational content (56 %), than of films and series (53 %), e-newspapers and magazines (52 %) and e-books (51 %).

As Figure 5.4 below shows, the proportions saying they feel confident in determining the legality of digital sources of music, TV shows and sport each show an increase in comparison to 2016. In 2016, the percentage who felt confident that they knew whether the source was legal or not was also highest for music and games. The percentage that knew the legality of the source of their digital content has risen from 59 % for music to 65 %, from 56 % for games to 58 % and from 53 % to 58 % for TV shows and sport.

Figure 5.4: Confidence in determining the legality of different sources of digital content ([26])



([26]) Source: Question IV1.1 — 1.8: When you look for content online do you know whether the source (website) you use for using, playing, downloading or streaming provides you the content legally or illegally? (N=18871).

6. Communication

Intellectual Property and Youth Scoreboard 2019

While the percentage of young people using an illegal source for online content has decreased, there has been a slight rise in the number who have bought counterfeit goods in the past year — albeit this is a small percentage of young people overall.

The 2016 Youth Scoreboard identified two main themes that might form the basis of any communications aimed at increasing young people's awareness of IPR and the negative impacts of counterfeiting and piracy. These themes were personal safety and risk; and moral values.

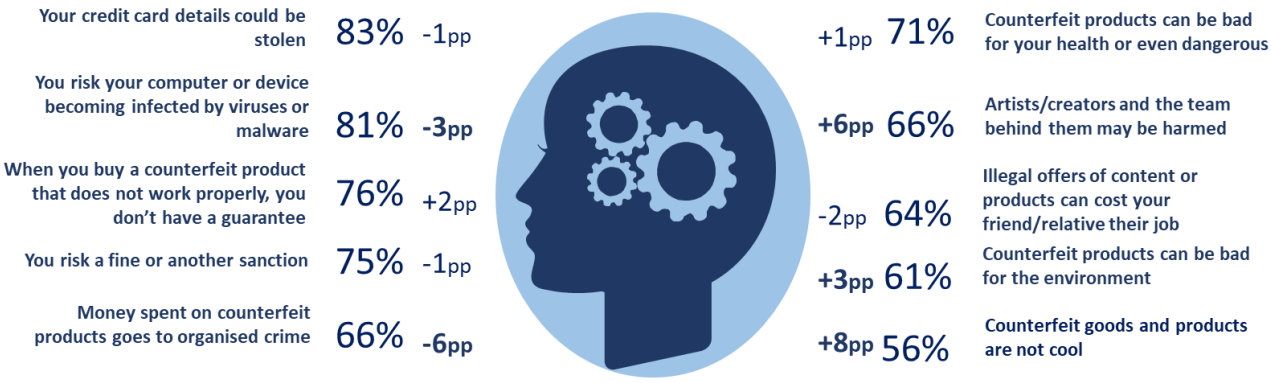
In 2016, the theme of 'personal safety and risk' was found to carry more weight than 'moral values', albeit both resonated with most respondents. The picture for 2019 is broadly the same: the factors that young people say would most make them think twice before purchasing content or goods from illegal sources all relate to personal safety and risks; such as: the potential for their credit card details to be stolen (83 % say this would definitely or probably make them think twice); the risk of computer viruses or malware (81 %); the absence of a guarantee for counterfeit products (76 %); and risk of a fine or other sanction (75 %).

At the same time, there have been some notable changes in the findings since 2016; in particular, an increase in the proportion of young people saying they would be influenced by three of the moral values-based considerations:

- that counterfeit goods and piracy are just not cool (up from 48 % to 56 %);
- that artists, creators and the teams behind them may be harmed (up from 60 % to 66 %);
- that counterfeit products can be bad for the environment (up from 58 % to 61 %).

In parallel with these changes, there has been a *decrease* in the proportion of young people saying they would be influenced by the consideration that money spent on counterfeit goods goes towards organised crime. Whereas almost three-quarters of young people selected this in 2016, the 2019 figure is 6 percentage points lower, at 66 %.

Figure 6.1: Considerations that would make young people think twice about purchasing digital content from illegal sources or counterfeit goods (difference since 2016 indicated by percentage point difference) ([27])



As in 2016, females were more likely than males to say they would be influenced by each of the considerations, with the difference most marked in relation to the potential environmental impact of counterfeit products (67 % of females selected this compared to 56 % of males); potential health impacts (75 % v 67 %) and the risk of a fine or other type of sanction (79 % v 71 %).

Students were more likely than young people who are working or unemployed to say they would be influenced by almost all of the considerations — most notably:

- the risk of having their credit card details stolen (85 % of students selected this compared to 75 % of the unemployed and 77 % of those in employment);
- the environmental impact of counterfeit products (63 % v 53 % and 56 %, respectively);
- the link between counterfeit goods and organised crime (68 % v 59 % and 63 %, respectively);
- the risk of facing a fine or other sanction (76 % v 64 % and 61 %, respectively).

In terms of other variations, the youngest group of respondents (those aged 15-17) were more likely than those aged 18 and over to say they would be influenced by considerations of personal safety and risk. For example, 79 % of this group say they would be influenced by the risk of a fine or other sanction, compared to 75 % of 18-21 year olds and 74 % of 22-24 year olds.

The youngest group were also the most likely to say they would be influenced by the argument that counterfeit goods and products are not cool (64 % v 53 % of 18-21 year olds, and 54 % of 22-24 year olds).

While this describes the overall trends, there are a number of variations between the countries and over time. To capture this variation, the Figure 6.2 below highlights a 'traffic light' coding of the countries:

- The dark blue indicates when the percentage agreeing that a given factor would make them think twice is statistically higher in this country compared to the EU average;
- The grey indicates when the percentage agreeing that a given factor would make them think twice is not statistically different compared to the EU average;

([27]) Source: Question IV11.1 — 11.10: What would make you think twice before using, playing, downloading or streaming content from an illegal source (website) or before buying a fake product online? (N=23 724) Yes and probably yes combined.

- The yellow indicates when the percentage agreeing that a given factor would make them think twice is statistically lower in this country compared to the EU average.

This traffic light allows us to see exactly which statements carry more or less weight in each of the EU countries as well as the broader patterns of the factors that are more or less likely to make young people think twice about using illegal sources to access digital content or purchase physical goods.

As previously stated, the findings illustrate that on average in the EU, the most influential factors that would make young people think twice about using illegal sources were related to credit card details being stolen, the risk of viruses/malware and the lack of a guarantee for fake goods. As indicated in Figure 6.2 below, the colour coding indicates where these statements carry more or less weight. For example, while the risk of credit card details being stolen as a factor to make young people think twice is 83 % on average in 2019, it ranges from 73 % in Sweden to over 90 % in Croatia and Luxembourg.

Earlier in this section, the results were also described in terms of shifts since 2016. One of the more notable shifts is in the percentage agreeing that ‘piracy is not cool’, from 48 % of all young people in 2016 to 56 % of young people in 2019. It is certainly true that in 2019 these figures appear to reflect that piracy is not cool in many European countries, however this is more pronounced in some countries rather than others. Piracy not being seen as cool as a factor that makes young people think twice about using illegal sources is especially pronounced in 2019 in Bulgaria, Czechia, France, Ireland, Luxembourg, Malta and Poland. Nevertheless, there is a lengthy list of countries that score below the EU average on this factor, indicating that there are quite a number of countries where ‘piracy is not cool’ does not resonate as much compared to the average in 2019.

The figures also see a shift in fewer young people agreeing that ‘money spent on fake products goes to organised crime’ is a factor that would make them think twice. Looking at the country differences, there are three countries with higher proportions of young people in Finland, Italy and Luxembourg agreeing with this factor compared to the EU average in 2019.

This goes to demonstrate that it is not a clear picture in terms of which messages resonate most with young people. To a large extent it depends upon the profile of the young person and the country in which they are living.

Figure 6.2: Communication messages across European countries that would make young people think twice about their behaviours

% (Probably) yes	Your credit card details could be stolen		You risk your computer or device becoming infected by viruses, or malware		When you buy a fake product which does not work properly you don´t have a guarantee		You can risk a fine or another sanction		Money spent on fake products goes to organised crime		Fake products can be bad for your health or even dangerous		Artists/creators and the team behind them can be hurt		Illegal offers of content or products can cost the job of your friend/relative		Fake products can be bad for the environment		Fakes and piracy are not cool	
	2016	2019	*2016*	2019	*2016*	2019	*2016*	2019	*2016*	2019	*2016*	2019	*2016*	2019	*2016*	2019	*2016*	2019	*2016*	2019
EU average	***84%***	**83%**	***78%***	**81%**	***74%***	**76%**	***75%***	**75%**	***72%***	**66%**	***70%***	**71%**	***60%***	**66%**	***66%***	**64%**	***58%***	**61%**	***48%***	**56%**
Austria	*86%*	84%	*77%*	76%	*72%*	73%	*77%*	73%	*70%*	67%	*76%*	75%	*59%*	60%	*71%*	69%	*60%*	63%	*40%*	50%
Belgium	*82%*	77%	*76%*	77%	*70%*	70%	*73%*	67%	*66%*	58%	*64%*	65%	*54%*	61%	*63%*	60%	*54%*	57%	*42%*	50%
Bulgaria	*87%*	88%	*82%*	87%	*80%*	84%	*68%*	67%	*71%*	65%	*78%*	77%	*70%*	69%	*63%*	63%	*65%*	62%	*60%*	64%
Cyprus	*85%*	76%	*89%*	77%	*84%*	62%	*80%*	67%	*61%*	49%	*71%*	67%	*30%*	38%	*62%*	46%	*50%*	54%	*26%*	28%
Czechia	*85%*	89%	*77%*	82%	*72%*	74%	*71%*	72%	*69%*	67%	*70%*	68%	*53%*	65%	*64%*	65%	*50%*	53%	*51%*	60%
Denmark	*79%*	77%	*75%*	76%	*67%*	67%	*72%*	74%	*58%*	63%	*54%*	65%	*51%*	54%	*50%*	53%	*46%*	58%	*48%*	57%
Estonia	*82%*	80%	*68%*	78%	*66%*	69%	*65%*	68%	*65%*	59%	*71%*	71%	*51%*	57%	*62%*	59%	*55%*	58%	*30%*	41%
Finland	*87%*	82%	*81%*	82%	*74%*	73%	*73%*	72%	*68%*	71%	*70%*	73%	*65%*	72%	*61%*	65%	*55%*	65%	*42%*	57%
France	*84%*	86%	*81%*	84%	*74%*	82%	*76%*	82%	*72%*	65%	*69%*	70%	*60%*	74%	*63%*	61%	*59%*	63%	*58%*	68%
Germany	*81%*	74%	*75%*	74%	*71%*	73%	*79%*	72%	*72%*	63%	*70%*	66%	*62%*	62%	*70%*	65%	*58%*	59%	*52%*	57%
Greece	*81%*	80%	*77%*	82%	*73%*	71%	*70%*	68%	*61%*	59%	*72%*	68%	*52%*	64%	*61%*	64%	*56%*	54%	*33%*	49%
Hungary	*83%*	80%	*77%*	81%	*70%*	70%	*75%*	70%	*71%*	64%	*65%*	64%	*62%*	67%	*67%*	63%	*56%*	53%	*48%*	48%
Ireland	*91%*	85%	*84%*	85%	*81%*	80%	*79%*	71%	*71%*	69%	*71%*	70%	*61%*	63%	*68%*	65%	*55%*	63%	*52%*	64%
Italy	*87%*	86%	*80%*	81%	*75%*	75%	*77%*	78%	*79%*	74%	*73%*	73%	*63%*	69%	*65%*	62%	*65%*	61%	*38%*	49%
Latvia	*87%*	81%	*77%*	79%	*76%*	72%	*72%*	65%	*70%*	70%	*58%*	62%	*59%*	63%	*62%*	62%	*44%*	47%	*49%*	51%
Lithuania	*86%*	76%	*82%*	74%	*76%*	63%	*80%*	68%	*72%*	64%	*74%*	65%	*56%*	51%	*74%*	62%	*61%*	54%	*50%*	48%
Luxembourg	*92%*	94%	*83%*	88%	*71%*	85%	*80%*	85%	*80%*	80%	*77%*	85%	*59%*	70%	*81%*	76%	*60%*	72%	*37%*	65%
Malta	*92%*	87%	*84%*	83%	*76%*	82%	*72%*	78%	*66%*	61%	*76%*	79%	*52%*	64%	*55%*	62%	*58%*	73%	*42%*	63%
Netherlands	*81%*	83%	*76%*	80%	*67%*	71%	*73%*	77%	*64%*	67%	*65%*	71%	*54%*	56%	*69%*	72%	*52%*	57%	*37%*	46%
Poland	*84%*	80%	*78%*	80%	*76%*	76%	*73%*	72%	*70%*	63%	*70%*	71%	*60%*	65%	*62%*	63%	*59%*	63%	*52%*	63%
Portugal	*88%*	87%	*78%*	77%	*78%*	69%	*79%*	74%	*71%*	68%	*66%*	68%	*68%*	70%	*66%*	62%	*57%*	58%	*47%*	48%
Romania	*87%*	89%	*81%*	86%	*82%*	83%	*76%*	73%	*75%*	63%	*72%*	77%	*67%*	64%	*62%*	58%	*62%*	65%	*55%*	57%
Slovakia	*80%*	84%	*73%*	81%	*72%*	77%	*70%*	76%	*66%*	67%	*69%*	79%	*56%*	65%	*63%*	64%	*59%*	67%	*37%*	41%
Slovenia	*90%*	85%	*82%*	83%	*71%*	67%	*79%*	72%	*77%*	60%	*80%*	70%	*59%*	61%	*74%*	57%	*64%*	57%	*41%*	46%
Spain	*84%*	83%	*78%*	79%	*72%*	75%	*74%*	73%	*75%*	68%	*67%*	69%	*58%*	73%	*68%*	73%	*56%*	60%	*41%*	52%
Sweden	*84%*	73%	*75%*	71%	*66%*	61%	*70%*	66%	*65%*	65%	*63%*	63%	*55%*	58%	*61%*	58%	*56%*	57%	*37%*	46%
United Kingdom	*87%*	86%	*81%*	86%	*75%*	79%	*77%*	78%	*73%*	69%	*72%*	77%	*63%*	67%	*72%*	66%	*59%*	66%	*52%*	59%
Croatia	*88%*	91%	*76%*	83%	*70%*	75%	*77%*	80%	*66%*	62%	*74%*	76%	*48%*	62%	*67%*	70%	*53%*	63%	*35%*	51%

7. Conclusion

2019 Intellectual Property and Youth Scoreboard

7.1 OVERALL CONCLUSIONS

Quality is the main factor that drives both the online purchasing of physical goods and accessing digital content. Beyond quality, young people are concerned with a safe shopping environment online and rank the site being safe as an important factor (with the addition of safe payment methods ranking highly for those purchasing physical goods).

The 2016 Youth Scoreboard revealed a significant disparity in young people's orientation towards the purchase of counterfeit physical goods on the one hand and illegal digital content on the other. Whereas only around one in five had bought counterfeit goods (and only half as many had done so *intentionally*) the comparable figure for illegal digital content was almost twice as high.

This broad picture is replicated in 2019: the purchase of counterfeit physical goods remains less common overall than the numbers accessing online content from illegal sources — such as films and series, music and games. In terms of what young people are buying or accessing, most commonly young people purchase counterfeit clothing and footwear, reflecting that these are also the most popular categories of products that are bought in general. However, while almost all young people access films and series as well as music, when it comes to accessing digital content from illegal sources it is most likely to be films and series that are accessed. Less than 40 % of those who access content from illegal sources access music through these sources in comparison to 79 % accessing films/series.

The key factor driving young people's intentional use of illegal sources for digital content continues to be cost, although other important factors also include the choice of content available from illegal sources, the lack of a requirement to register with these sources, and the perceived speed and ease with which content can be accessed. Additionally, almost a quarter of young people who intentionally access content through illegal sources say they do so because it is for personal consumption. This perhaps suggests a need for further messaging aimed at directly countering any misperceptions around the acceptability of personal versus public use of content from illegal sources.

Cost similarly remains the main factor driving the purchase of counterfeit physical goods. Equally though, there is clear sense in which young Europeans who engage in this behaviour do not perceive compelling reasons for not purchasing such goods — it is common for them to say so explicitly or to offer similar views; for example, that they 'don't care' about buying such goods or that they do not see a clear difference between original or fake products. Again, this underscores the continuing need for education-based messaging. Indeed, when young people who have intentionally purchased illegal content or counterfeit goods are presented with considerations that might dissuade them from doing so again in the future, the overwhelming majority say they would be influenced by at least one of these — with the availability of more affordable original products standing out as particularly important in this respect.

Looking at those who consciously ensure that they do not access digital content through illegal sources or buy counterfeit goods, it is interesting to see that the reasons given are very similar. The top reason for young people to avoid illegal sources is the risk of viruses and the fact that the quality of originals is better. The other two main drivers for avoiding such behaviour are that young people do not trust these websites and do not want to be doing anything illegal.

Of course, it is important to bear in mind that not all purchasing of counterfeit goods or illegal content is intentional and it remains the case that a significant minority of young people fall into this behaviour by accident. The study suggests that this may continue to reflect the difficulties that some young people

experience in distinguishing between legal and illegal sources; another issue that should remain a focus in future messaging.

7.2 COMPARISON OF THE RESULTS TO THE INTELLECTUAL PROPERTY AND YOUTH SCOREBOARD 2016

Despite the significant level of consistency between the 2016 and 2019 results, outlined in the foregoing, there are also some indications of possible changes in attitudes and behaviours over this period, which could suggest that ongoing work aimed at increasing young people's awareness of IPR and the negative impact of counterfeiting and piracy as well as market shifts may be having an impact. These changes are described in this section of the report, although it remains to be seen in future waves whether these shifts are indicative of a real change in the behaviours and attitudes of young people or are simply small, short-term deviations.

Firstly, quality remains the most important factor driving young people's choice of digital content ([28]) and products purchased online, and there is evidence that they are more willing to pay for quality. Cost does not appear to be as strong a driver as it was in 2016. This is not to say that cost considerations do not remain important; nevertheless, price (i.e. a product or digital content being cheap or free) being important when purchasing goods or digital content online has decreased by 8 and 9 percentage points, respectively. Young people also seem to be more willing than previously to pay for digital content online, as there has been a 9 percentage point rise in those who say that being able to pay a subscription fee to have access to all content is important. Furthermore, when looking at why young people who have intentionally bought fake goods or have used illegal sources to access digital content have done so, fewer young people mentioned price in comparison to 2016. They also are less likely to agree that they use illegal sources to access digital content because they can access the content per item (27 % in 2016 compared to 16 % in 2019) or because they do not need to register (down 10 percentage points since 2016), also indicating that subscription services and the current legal offerings may have addressed a gap previously in the market. The availability of affordable original products is the top reason to stop buying counterfeit goods among those who engage in this behaviour, but it also does not carry as much weight in comparison to 2016 (41 % in 2019 compared to 44 % in 2016). The same pattern holds for content from legal sources, with a shift from 58 % mentioning this as something that would make them stop accessing content from illegal sources compared to 55 % in 2019. However, as noted at the beginning of this section, these shifts are rather small and it remains to be seen as to whether they are truly indicative of a change in attitudes.

Secondly, young people in 2019 appear to **increasingly consider the legality of online sources for content and the origins of physical goods** when making decisions about their online purchasing behaviour in comparison to 2016. Among all young people who purchase goods online, the percentage who say that the item being original and not fake is important to them has risen by 3 percentage points since 2016. The same pattern holds for digital content, where there has been a 4 percentage point increase in the number of young people who say that the site/source offering content on a legal basis is an important consideration.

An indicative finding is that there has been **a decrease in the proportion of young people who have intentionally accessed digital content through illegal sources (by 4 percentage points) and an increase in the percentage who have intentionally not used illegal sources (by 11 percentage points).** Furthermore, this is more pronounced for some specific types of content. Among those who

([28]) However, less so by 5 percentage points in 2019 compared to 2016.

intentionally use illegal sources to access digital content, there has been a 17 percentage point decline among those who say they did this to access music and a 7 percentage point decrease to access films through illegal sources. This may be related to the finding that young people are more positive about being able to use subscription services and the changes in the way that digital content is offered now in 2019 in comparison to 2016.

This shift away from using illegal sources to access digital content is **not reflected** in young people's propensity to buy fake goods: similar proportions have done this intentionally (and by accident) since 2016 and in fact there has even been a slight increase in the purchase of these goods — although it should be remembered that buying fake goods remains far less common than accessing digital content illegally.

Young people seem to be more willing to know whether their behaviour is legal or not and to take this into consideration when making decisions about purchases and accessing digital content. Even among those who have bought fake products intentionally, there has been a slight decline in the percentage stating that the reason they did so was because they did not care whether the product was genuine or fake (from 30 % in 2016 to 27 % in 2019). Similarly, there has been a 3 percentage point decrease in the number of young people who say they access digital content from illegal sources (intentionally) because they do not know why they should not do so — and, importantly, more young people seem to be aware that accessing content for personal use does not make it legal (i.e. the percentage who gave this as a reason for using illegal sources dropped 13 percentage points between the waves). The importance of knowing whether a source or product is legal is also reflected in the increase in the proportion that carry out at least one check to see whether the source is legal or otherwise. Therefore, there is a willingness among young people that can be capitalised on when designing strategies to inform them about the legality of sources in their decision making.

Thirdly, **young people are more amenable to values-based (as opposed to just security-based) arguments against purchasing illegal online content and counterfeit physical goods**. Among those who have bought a fake product, there has been a 4 percentage point increase in the number that say a better understanding of the harm caused by their behaviour would make them stop, whereas having a bad personal experience has decreased by 5 percentage points, highlighting this shift. That the proportion of young people experiencing problems with counterfeit goods has increased since 2016 may only serve to buttress these positive shifts in attitudes and behaviours going forward.

When it comes to digital content from illegal sources, it also appears that there may be more openness to move away from this behaviour. Those who access digital content through illegal sources are less likely to say that nothing would make them stop (down 3 percentage points). There is also a stronger sentiment in this year's Youth Scoreboard that using illegal sources to access digital content is not cool. While other reasons might outweigh this one (as described earlier), there has been an increase from 15 % to 19 % among those that do not use illegal sources because it is not cool to access content from these sources. This pattern is not observed among those who do not buy fake products, although this could reflect that buying fake products was never cool whereas accessing content illegally is becoming more 'uncool' than previously. Among all young people, the percentage saying that 'fakes and piracy not being cool' would make them think twice about engaging in such behaviour has risen from 48 % to 56 % between the two waves, again highlighting the message that is increasingly resonating with this demographic.

Fourthly, **young people are slightly more aware of whether sources are offering content or products legally or illegally in 2019 compared to 2016**. The percentage of young people who agree that they can tell the difference between websites that offer real versus fake products has risen from 36 % to 39 %. Similarly, the proportion of young people able to determine whether the sources are illegal or legal is higher now than in 2016 for all content categories with the exception of films, where the figure is stable. There was also a decline (6 percentage points) in the proportion of young people who say they do not know whether the sources they use for digital content are legal or illegal. Nevertheless, as mentioned earlier, there remains a proportion of young people who continue to struggle to identify legal from illegal sources for both physical goods and digital content.

While the foregoing highlights the main findings of the 2019 Youth Scoreboard in general and the findings in comparison to 2016, it is important to bear in mind that the findings do not apply across the board. Significant country differences in attitudes and behaviours remain, including the extent to which the legality of sources is considered important, the number of young people who are using illegal sources or purchasing counterfeit goods, etc. Furthermore, the direction of change is not uniform across all countries and there have been increases in certain attitudes and behaviours in some countries that go against the trend of fewer young people engaging in this type of behaviour. Work is needed to develop a full understanding of the factors underlying these trends and to identify tailored strategies accordingly.

There are also demographic-based differences among young people — particularly in terms of gender and age —which similarly suggest a need for differentiated communication and messaging strategies for maximum impact.

In sum, the 2019 results suggest that the need for continued action in this area remains a priority. Strategies have to combine both market efforts and communication efforts and should be tailored. On a general level, these efforts should include ensuring that good quality and an affordable offer is available for young people in the market, as well as attempting to inform young people better of the risks of engaging in such behaviour as well as rationalising the moral arguments. While young people may be able to distinguish legal from illegal sources better, information signposts for youngsters remain relevant.

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