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

EXECUTIVE SUMMARY

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

Executive summary: June 2023

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EXECUTIVE SUMMARY

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

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

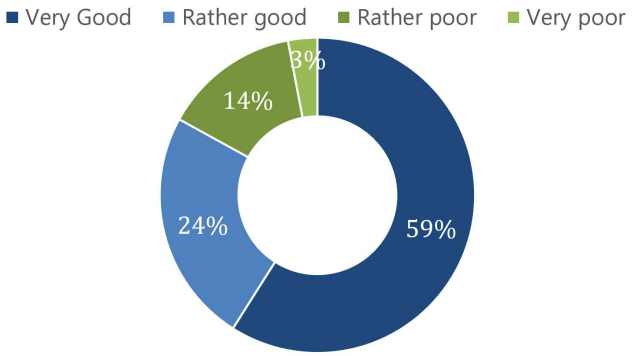
In total, 25 824 interviews were conducted between 30 January 2023 and 15 February 2023 with residents aged 15 and above, in all EU Member States.

1. INTELLECTUAL PROPERTY – AWARENESS AND PERCEPTIONS

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

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

Understanding of the meaning of the term "intellectual property" is …



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

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

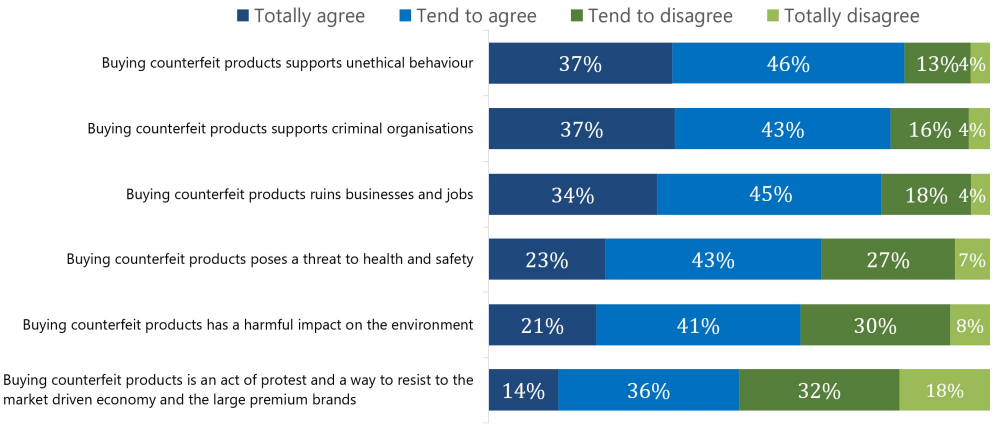
Despite this widespread awareness of the importance of IP protection, not many Europeans think that consumers like themselves are the main beneficiaries of this protection (8 %). In contrast, more than half consider performing artists such as musicians (54 %), and creators of artistic content (52 %)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

2. COUNTERFEIT GOODS – BEHAVIOUR AND DRIVERS OF CONSUMPTION

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

Europeans tend to be well aware of the various negative effects of buying counterfeit goods. Most commonly in this regard, they think that **it supports unethical behaviour (83 %) and criminal organisations (80 %)**. A majority also believe that it has a detrimental economic impact, by ruining business and jobs (79 %). In addition, while it is somewhat less common to consider the purchase of counterfeit goods as **a threat to health and safety and to the environment**, around two thirds also agree with this.

Understanding of the negative effects of buying counterfeit products



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

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

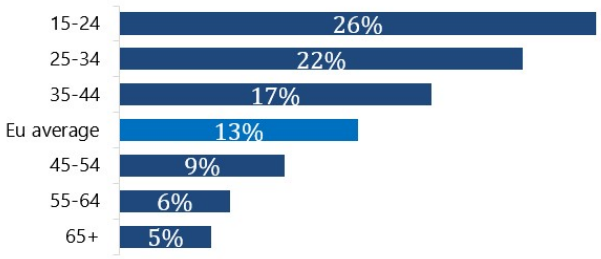
The degree of acceptance of these reasons varies with age. In general, **younger consumers are more likely to be open to justifications for purchasing counterfeit goods**, especially in relation to financial arguments. For instance, 50 % of those aged between 15 and 24 agree or tend to agree that it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

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

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

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

Intentional buyers of counterfeit goods by age



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

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

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

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

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

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

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

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

3. PIRATED ONLINE CONTENT – BEHAVIOUR AND DRIVERS OF CONSUMPTION

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

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

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

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

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

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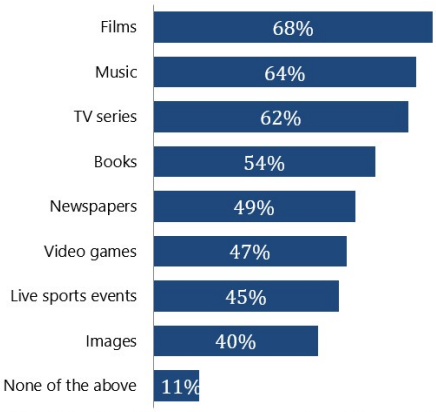
Awareness of legal offers



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

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

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

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

Use of legal online sources compared to illegal sources

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

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

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

As noted above, a minority of 14 % of Europeans report that they have accessed or streamed online content from illegal sources. 12 % of Europeans have done this specifically to watch sports, with 11 % saying that they have used illicit streaming devices such as set-top boxes or downloaded apps to illegally access content. The latter figure suggests an increased popularity of such tools compared to previous waves of the survey.

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

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

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

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

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

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