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INTELLECTUAL PROPERTY AND YOUTH

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Scoreboard 2016

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Intellectual Property and Youth

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Foreword

Intellectual Property and Youth

Previous studies by the Office through the Observatory have made clear the strong linkages between Intellectual Property Rights and the economy. They have also illustrated the negative consequences of infringements to jobs in legitimate industry and government revenue.

However, the 2013 study of what European citizens think about these important rights demonstrated that not everyone fully accepts the contribution of IPR and that young people in particular can be sceptical.

In response to these results the Office set out to try and better understand the attitudes of 15-24 year olds via the current IP Youth Scoreboard, which will be repeated on a regular basis to monitor evolution.

The Scoreboard covers young people in all 28 Member States and its main objective is to gather knowledge on how young people behave online in terms of Intellectual Property Rights.

In particular, it explores what are the main drivers and barriers to acquiring digital content and physical goods offered from both legal and illegal sources.

Finally, the study assesses what could be done to improve the situation.

To briefly summarise a few of the main findings, the report reveals that young European citizens feel there is a lack of information about IP that would help them understand the issues. They also say that the information that is available is not communicated effectively to their age group.

These factors combine to produce an atmosphere of indifference so that many young people who have been brought up in this digital age do not care whether they infringe IP or not.

Around one third of the study respondents also identify the lack of availability of the films or television series that their colleagues from the US or other places have access to as a factor driving them to illegal sources.

Finally, and possibly most importantly, two thirds of those polled identified price as a significant driver for using illegal sources.

This study provides a comprehensive and thorough review of the subject, carried out impartially and using a transparent methodology.

The current report, combined with the facts and evidence in other studies carried out by the Office through the Observatory, deserves to be carefully studied by IP rights owners, industry professionals, educators and policymakers.

The findings may not please everyone but they certainly indicate the scale of the problem ahead if future generations are to understand and respect IP rights.

Hopefully, they will create a greater understanding of the issue and inspire new approaches to providing young people with the tools they need to properly understand the role of innovation and play a full and constructive role in the knowledge society.

Out of this we hope to build the foundation for a network that can give a lead to our joint efforts to build an IP education and communication strategy that really works when deployed nationally by local actors.

It probably won't be easy, but it will certainly be exciting, and I would warmly thank everyone for helping us take the first steps on this journey.

António Campinos,
Executive Director, EUIPO

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1. Executive Summary

Intellectual Property and Youth

In 2013, the EUIPO, through the European Observatory on Infringements of Intellectual Property Rights, commissioned a study "European Citizens and Intellectual Property: Perception, Awareness and Behaviour". One of its key results indicated that the younger generation challenges IP significantly more than other age groups.
In order to have a better understanding of the reasons why this is happening, the EUIPO ordered this follow-up study among young people aged 15-24 in all 28 Member States (MS). The main objective of this study is to gather knowledge on how young people behave online in terms of intellectual property rights. In particular, it explores what are the main drivers and barriers to acquiring digital content and physical goods offered both legally and illegally. Finally, the study assesses what could be done to improve the situation.
The first phase of the study consisted of qualitative research in each of the 28 MS. This was done in the form of focus group sessions of 120 minutes in which 8 young Europeans per group participated. The second phase was the quantitative part of the study, which consisted of an online survey using CAWI[1] methodology based on GfK panels in the 28 MS. The questionnaire for the online survey was designed based on the results of the qualitative focus groups and was used to obtain quantifiable data in addition to the insights obtained during the qualitative research. The subgroups that are considered by default relate to the socio-demographic characteristics of gender, age group, education level (completed education and undertaking education), employment status, and income as a student.

1.1 Digital Content

MUSIC IS THE MOST FREQUENTLY ACCESSED DIGITAL CONTENT

Music, films and series, and games were accessed and used by the majority of respondents in the past 12 months while e-newspapers and magazines and e-books were accessed by slightly smaller proportions.

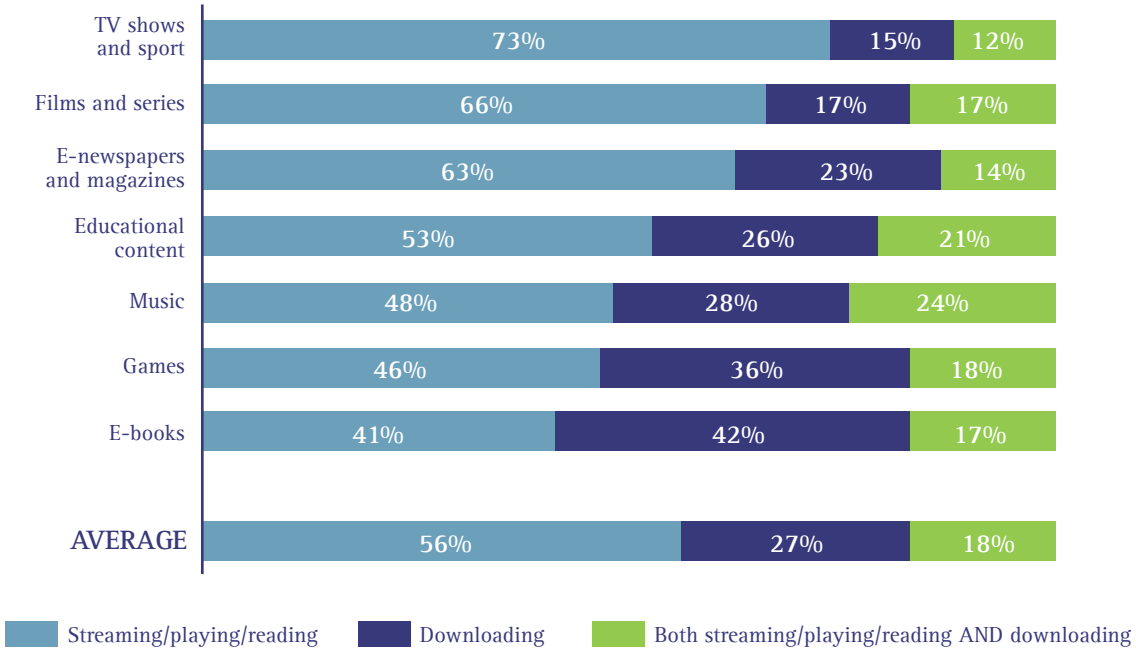
- 97% - MUSIC
- 95% - FILMS AND SERIES
- 91% - GAMES
- 83% - EDUCATIONAL CONTENT
- 80% - TV SHOWS AND SPORT
- 61% - E-NEWSPAPERS AND MAGAZINES
- 58% - E-BOOKS

1 Computer-assisted Web Interviewing

Looking at the usage frequency[2], music was accessed 204 days per year on average. The type of content that young people used the least was e-newspapers and magazines, 46 days per year.

STREAMING, IN GENERAL, IS MORE POPULAR THAN DOWNLOADING

The focus groups found that for young people it makes less sense to download the song, to store it on the hard drive of their cell phone, tablet, laptop or other device. The same is true for sports, which are one-time events to be experienced live. Thus, music, films, series and sport are mainly streamed and not downloaded, which is not the case for e-books. These preferences between streaming or downloading digital content were confirmed by the results from the online survey.

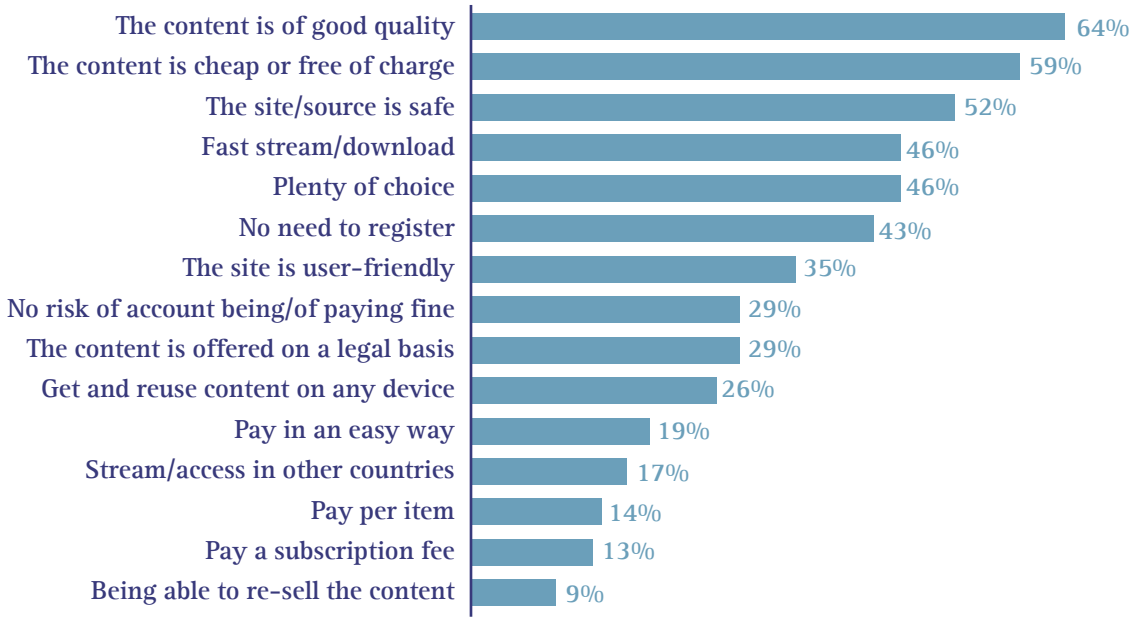


Teenagers (15-17 year olds) are more likely than average to stream various content types: TV shows and sport, e-newspapers and magazines, films and series, e-books and educational content; whereas adults (22-24 year olds) prefer to download TV shows and sport, films and series, e-books and educational content.

2 Usage frequency is calculated by recoding answers to a single unit of "days per year": the answer 'daily use' is multiplied by 365, the answer 'weekly use' is multiplied by 52, the answer 'monthly use' is multiplied by 12 and the answer 'rare use' is multiplied by 4.

QUALITY, PRICE AND SAFETY ARE THE MOST IMPORTANT ASPECTS YOUNG PEOPLE CONSIDER WHEN ACCESSING CONTENT ONLINE

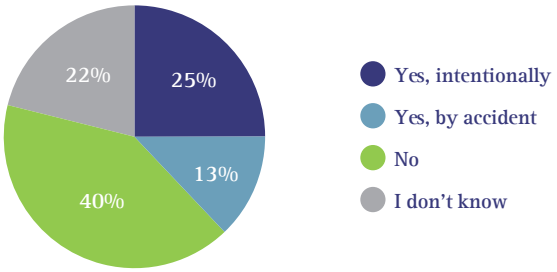
When asked what young Europeans consider important when they stream or download digital content, three aspects stand out: almost two thirds of the respondents say the online content being of good quality is one of the most important aspects. For a slightly smaller proportion of young people, digital content which is cheap or free of charge is very important. The safety of the site or source comes third. The results of the survey find that nearly one third (29%) of young people state that they consider the legality of the source as important when accessing digital content. Country variations are shown in the report.



25% OF YOUNG PEOPLE USED ILLEGAL SOURCES TO ACCESS DIGITAL CONTENT IN THE LAST 12 MONTHS

One in four young people use illegal sources to access digital content. Although there is clearly a proportion of young people who use illegal sources, the vast majority (81%) in the sample said they also use legal sources for accessing online content. This means that only a minority (5%) solely uses illegal sources to access online content. Students with an income show a higher rate of intentional usage of illegal sources: 70% vs 63% of students without an income. Higher intentional usage is observed amongst those who have already completed education.

Used illegal sources to access digital content[3]

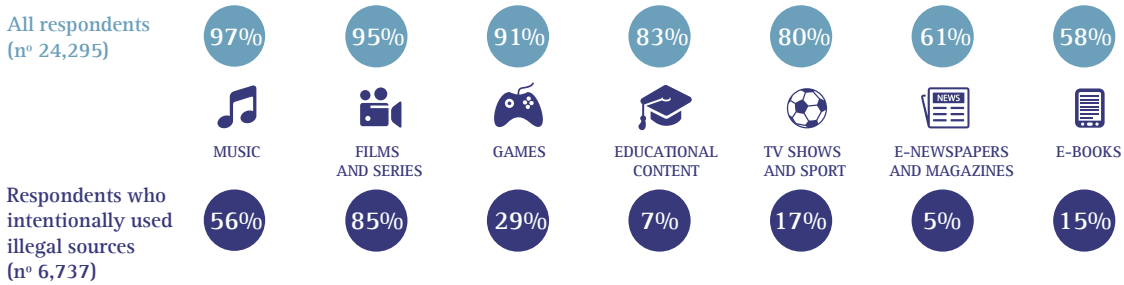


Those who accidentally accessed illegal sources (mostly the youngest group) gave the following reasons for refraining from infringements: fear of the risks posed by viruses or spyware (53%), little trust in illegal sources (45%) and not wishing to do anything illegal (43%). The majority of young people who do not know whether they used legal or illegal sources stated that it is due to the fact that they are unable to determine whether the source is legal or not rather than the fact they do not care about the legality of the source.

AMONGST THOSE WHO INTENTIONALLY USE ILLEGAL SOURCES, FILMS AND SERIES ARE THE DIGITAL CONTENT THAT IS MOST FREQUENTLY ACCESSED USING THESE SOURCES

Music is the most popular digital content that young people access, with almost all young people streaming or downloading this content (97%). However, only a little over half (56%) of young people who use illegal sources are doing so to access music content. Films/series is the second most accessed content (95%), but the first (85%) intentionally accessed through illegal sources.

Use of digital content in general and intentional use of digital content from illegal sources[4]



3 Source: Question IV2: During the past 12 months, have you used, played, downloaded or streamed content from illegal sources (websites)? (N=24,083) and IV3: Did you use the illegal source(s) (website(s)) for content intentionally? (N=9,907)

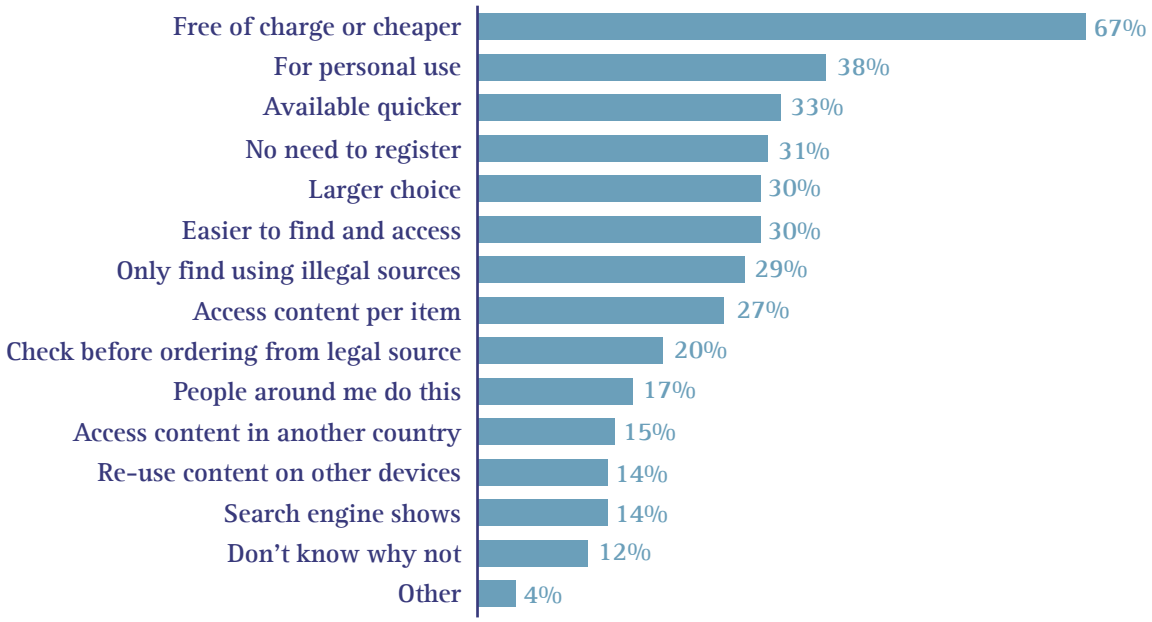
4 Source: Question II3.1: How often have you listened to, watched, read, used, played, downloaded or streamed the following content from the internet during the past 12 months? (N=24,295) and IV4: Which type of content did you use, play, download or stream intentionally from an illegal source (website)? Please indicate all that apply. (N=6,737)

PRICE, "PERSONAL USE ONLY" AND AVAILABILITY ARE THE TOP THREE DRIVERS FOR USING ILLEGAL SOURCES

Price matters the most for woman (73% vs 62% men), for students without an income (71% vs 67% students with an income), for unemployed respondents (67% vs 56% employed) and last but not least for students in higher education (73% vs 62% in secondary education). Price is the most important driver for using illegal sources for online content in all countries amongst those using illegal sources. The second most important reason for using illegal sources indicated by 38% of young people who do so is that they do not see anything wrong in doing it as it is for their personal use. This attitude is expressed less often by those who graduated from higher education (28% compared with 38% for medium and 34% for lower educated).

30% of those using illegal sources indicate that they cannot find the digital content they are searching for on legal sites, and approximately one third indicate the following aspects as being the drivers for using illegal sources: online content on illegal sources being available more quickly, there is no need to register, content on illegal sources is easier to find and access or is of a larger choice on illegal sources. All these reasons are mentioned more often by women than by men.

Drivers for intentionally using illegal sources[5]

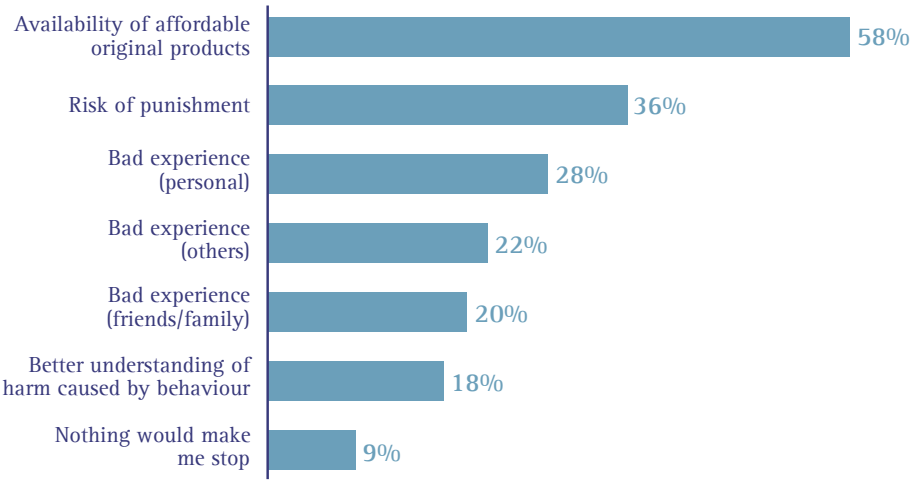


5 Source: Question IV5: You indicated that you have used illegal sources (websites) intentionally for online content during the past 12 months. What was the reason for this? Please indicate all that apply. (N=6,737)

THE AVAILABILITY OF AFFORDABLE CONTENT VIA LEGAL SOURCES, RISK OF PUNISHMENT AND NEGATIVE EXPERIENCE WOULD BE THE PRIMARY REASONS TO STOP USING ILLEGAL SOURCES

Amongst those in the focus groups who are aware that they are using illegal sources to access digital content, the potential loss of income that music or film stars could suffer caused by their behaviour does not seem to make an impression. The availability of affordable content via legal sources would be the primary reason to stop using illegal sources according to the survey. Young women (61% vs 56% men) and students in higher education (63% vs 49% in secondary education) are the socio-demographic groups who share this opinion the most. The risk of punishment is the second most indicated reason for young people to eventually stop using illegal sources. The potential risk of punishment has more impact on young women (40%) than young men (33%), on the youngest age group (42%) more than on the middle (36%) and the oldest age groups (32%) and on students (38%) more than on non-students (30%). The third reason to stop using illegal sources is having had a bad experience. Here, the biggest impact of a negative experience is when that experience is personal (rather than happening to others), especially for young women (31% vs 26% men).

Main reasons given to stop using illegal sources to access digital content[6]



6 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=6,737)

1.2 Online purchase of physical goods

CLOTHES AND ACCESSORIES ARE THE MOST COMMON PRODUCTS BOUGHT ONLINE

Clothes and accessories are by far the most popular product category to be bought online by young Europeans. The second most popular product is footwear. Both product categories are bought significantly more often by young females (73% for clothes and accessories and 50% for footwear) than by males (55% and 41%). These products are not only gender-driven, but the online purchase of clothes and accessories and footwear also increases with age, level of education and income. Tickets, the third most popular product bought online by young people, are also bought more often by young women (42%) than by men (31%). Similar to clothing and footwear, tickets are bought more often by older respondents, higher educated respondents and those with an income.

64% Clothes and accessories

46% Footwear

36% Tickets
Transport, events, etc

35% Small electronic devices
USB sticks, earphones, etc

31% Books and magazines

30% Hygiene, cosmetics, personal care and perfume

30% Music and films

26% Games
CDs, DVDs, Blu-ray discs, etc

25% Sportswear and equipment

23% Jewellery and watches

23% Large electronic devices
Computers, cameras, consoles

23% Telecom equipment
Phones and accessories

18% Foodstuff and beverages

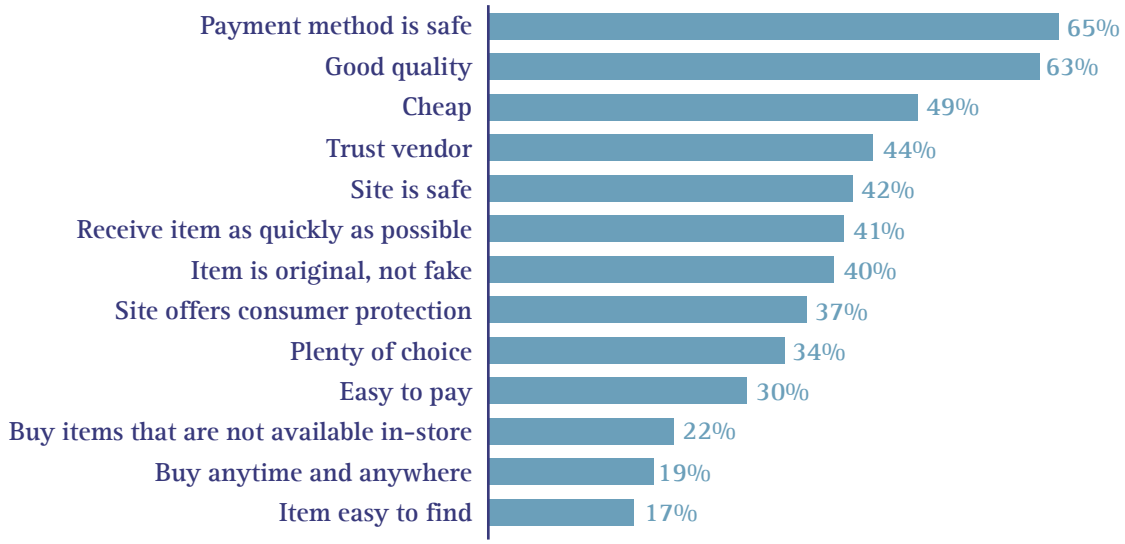
14% Toys

12% Medication

9% Household cleaning and laundry

SAFE PAYMENT METHOD, QUALITY AND PRICE ARE THE MOST IMPORTANT ASPECTS WHILE BUYING PRODUCTS ONLINE

A safe payment method is indicated by almost two thirds of young people as an important consideration when making an online purchase. In terms of socio-demographic categories, a larger proportion of young women (69%) and students without an income (68%) consider the safety of payment important in comparison to men (61%) and students with an income (64%). The youngest age group (15-17 year olds) is also more likely than average to find this aspect important. Quality is the second most indicated aspect, with no major differences between the different socio-demographic groups, although the youngest group mentions this aspect more than the older age groups (respectively 68% vs 62% vs 60%). Price is the third aspect, which is more important for young men (50% vs 48% women), the older age group (18% vs 14% for the youngest), employed (21% vs 16% for the unemployed) and lower educated (19% vs 14% higher educated) respondents.

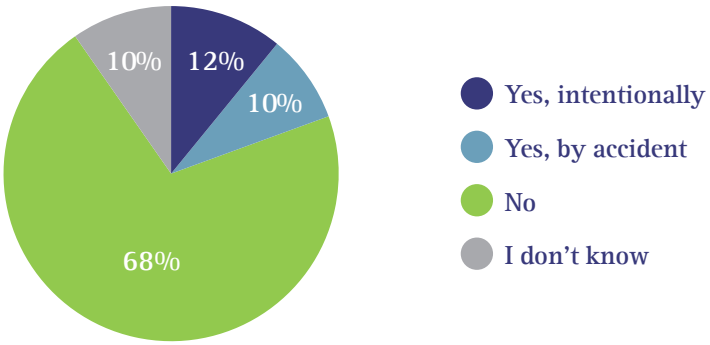


12% OF YOUNG PEOPLE INTENTIONALLY BOUGHT A COUNTERFEIT PRODUCT ONLINE IN THE LAST 12 MONTHS

Young people have a different mind-set when it comes to the online purchase of counterfeit products in comparison to their attitudes and behaviours when illegally accessing digital content. The qualitative and quantitative analysis highlights that young people do not really care whether sources are legal or illegal when streaming or

downloading content. In contrast, in the focus groups they indicated that they do not like counterfeit goods and are not interested in buying these products. This is supported by the results of the quantitative analysis, which find that a minority of only 12% intentionally buy counterfeit goods. Young females, 18-21 year olds, students in higher education and the unemployed are less likely to buy counterfeit goods intentionally.

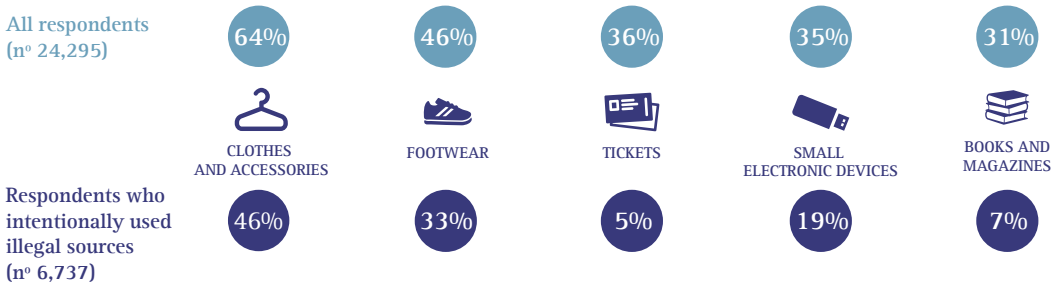
Purchase of counterfeit goods[7]



Counterfeit goods seem to have a rather bad image amongst young people. They are expected to be of lesser quality than genuine products. The offer of counterfeit products is associated with shady websites that young people do not trust. Young Europeans fear fraud and do not want to experience any harm from buying counterfeit products online. Young people are far more conscious of avoiding counterfeit goods given these reasons.

CLOTHES AND ACCESSORIES ARE THE MOST POPULAR CATEGORY OF COUNTERFEIT GOODS BOUGHT ONLINE

Clothes and accessories are the most popular category of goods purchased online in general and are the most likely goods to be purchased as counterfeits amongst those who do so. Counterfeits in other categories are bought less often.

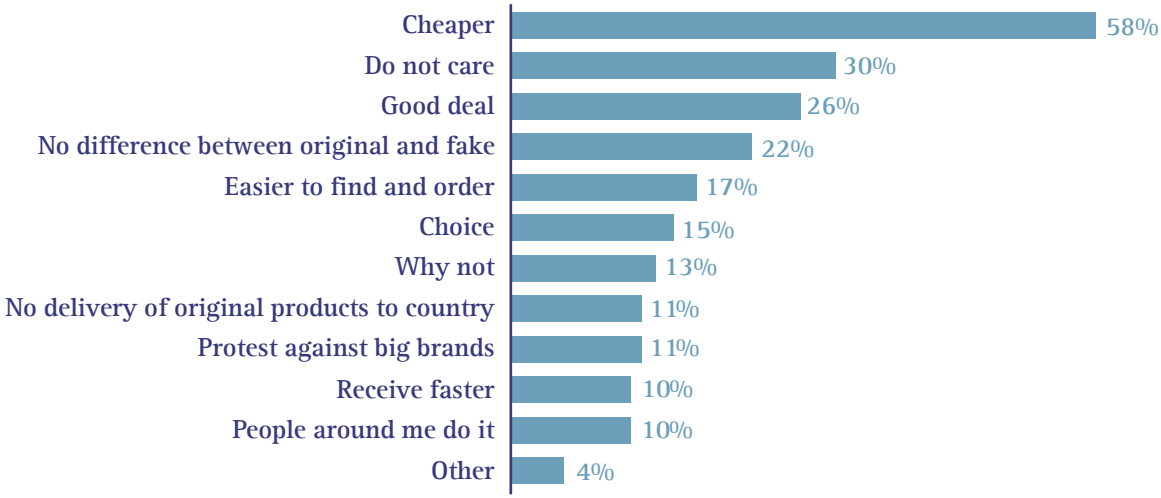


7 Source: Question III2: During the past 12 months, have you bought a fake product online? (N=21,981)

PRICE IS THE MAIN DRIVER FOR BUYING COUNTERFEIT GOODS ONLINE FOLLOWED BY INDIFFERENCE AND BELIEF THAT PURCHASING A FAKE IS A GOOD DEAL

For the minority of young people who do intentionally purchase counterfeit goods online, the main driver of this behaviour is price, and after this it is the indifference as to whether the goods are counterfeit or not. A quarter of those who intentionally purchase counterfeit goods online are motivated by getting a 'good deal'. More than one in ten young people bought a counterfeit good because the sites offering the originals were not available in their country.

Drivers of intentional purchase of counterfeit goods online[8]

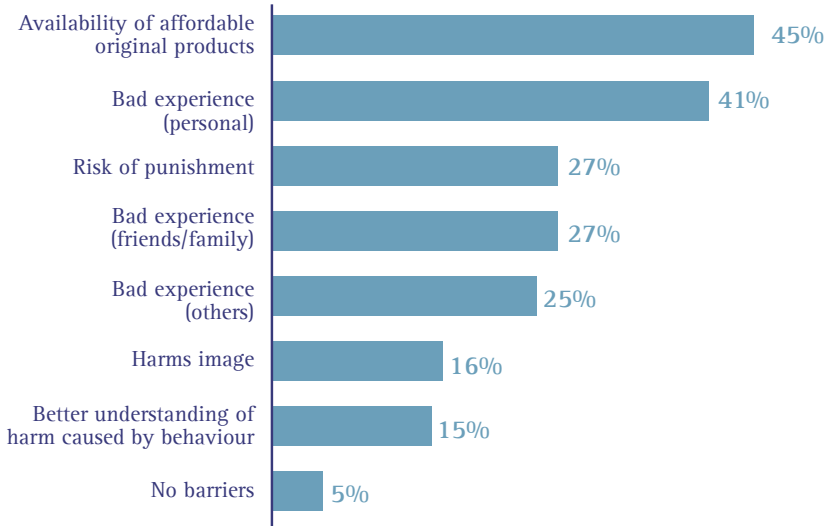


AVAILABILITY OF AFFORDABLE ORIGINALS, BAD EXPERIENCE AND RISK OF PUNISHMENT WOULD MAKE MOST YOUNG PEOPLE STOP BUYING COUNTERFEIT PRODUCTS

Almost half of young people buying counterfeit products would stop doing so if affordable original products were available. Again, price seems a clear motivator in the decision to buy a counterfeit good. In particular, young women (53% vs 38% men) who intentionally bought counterfeit goods would buy genuine goods if affordable. Having a bad experience, either personal, of one of their friends and relatives or of others, is another potential reason to stop. For young women (44%), a negative personal experience would have more impact than for men (38%). A third important factor indicated by the respondents

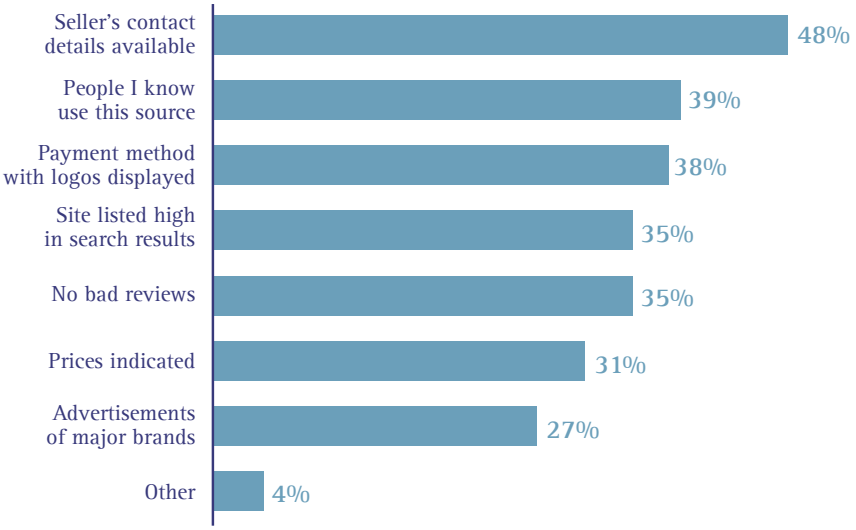
8 Source: Question III4: You indicated that you have intentionally bought a fake product online during the past 12 months. What was the reason for this? Please indicate all that apply. (N=2,836)

as a reason to stop buying counterfeit goods is the risk of punishment, although only 23% of the oldest age group (22-24 year olds) mention this answer.



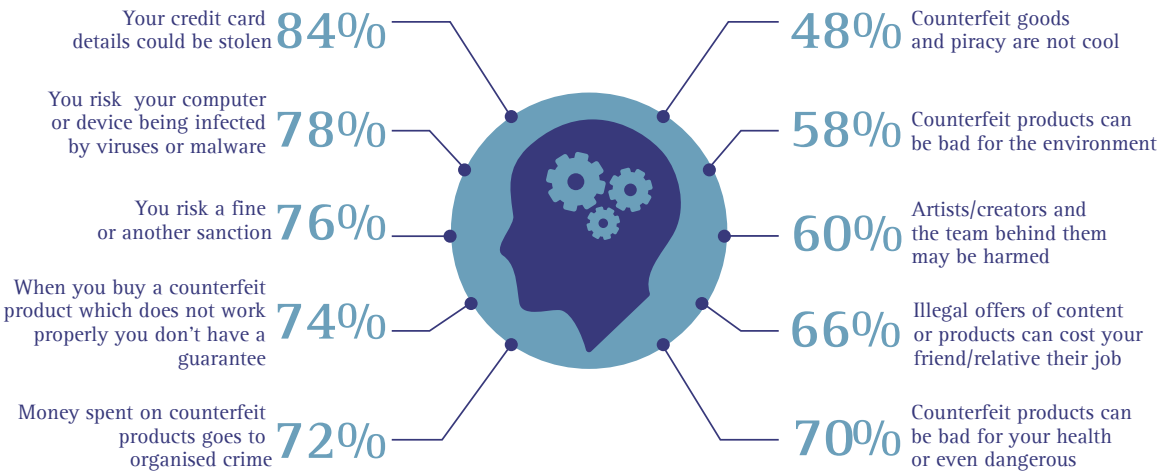
A THIRD OF YOUNG PEOPLE SAY THAT THEY ARE ABLE TO DISTINGUISH SITES SELLING COUNTERFEIT GOODS FROM THOSE THAT SELL GENUINE GOODS, AND HALF INDICATED THAT THEY ARE ABLE TO DISTINGUISH LEGAL FROM ILLEGAL SOURCES FOR ONLINE CONTENT

The most important indicator to consider a source legal, mentioned by almost half of all young people (48%), is whether contact details are available. Moreover, 39% of young people emphasise the fact that if people they know use the site, it is a clear reason to consider the source legal. A similar proportion argues that when payment providers and credit card logos are displayed on payment pages, the site is legal. The popularity of the website in search engine results also influences young people, with just over a third (35%) of young people believing that when the site is one of the first results to appear in a search it is legal. For 27% of young Europeans, the fact that advertisements of major brands are displayed is a sign that the source is legal.



1.3 Communication on counterfeiting and piracy

ARGUMENTS RELATED TO PERSONAL SAFETY RATHER THAN MORAL VALUES ARE BETTER SUITED TO CONVINCING YOUNG PEOPLE TO THINK TWICE BEFORE USING ILLEGAL SOURCES OR BUYING COUNTERFEIT GOODS



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2. Overall introduction

Intellectual Property and Youth

This research consists of two sub-studies, using two different kinds of methodology: a qualitative study based on focus groups and a quantitative study based on online surveys. The findings of the qualitative focus groups will be presented in the next section. Subsequently, the findings of the quantitative part will be discussed.

The study covers the 28 European Member States and targets young Europeans between 15 and 24 years old. The main objective of the study is to gather knowledge of how young people behave online and in particular to explore what are for them the main drivers and barriers for acquiring online content and physical goods offered legally and illegally and to assess what could be done to improve the situation in terms of communication or changes to the digital environment.

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3. PART A: Qualitative research – Focus groups

Intellectual Property and Youth

3.1 Introduction

With regard to online digital content, the qualitative part of the study aimed to create a journey map for searching, accessing, downloading, streaming and using content online (music, films/series, TV shows and sport, games, e-books, e-newspapers and magazines, educational content) in relation to legal and illegal sources. Journey mapping, here, means an oriented graph that describes the journey of a user by representing the successive steps in using the internet to arrive at the content he or she is looking for. For the journey mapping, participants were asked to think retrospectively about every website they typically browse and use in chronological order to find the content they want; before this exercise they were also showed some examples of existing journey maps.
A related main research objective comprised the understanding of their motivations with regard to searching, accessing and using legal/illegal sources of digital content.
With regard to the online purchase of physical goods, the study aimed to gauge young people's attitudes towards counterfeit products, understanding their drivers and barriers when purchasing genuine and counterfeit products and creating a journey map for how they search and order genuine and counterfeit products online.
In addition to these questions, the young people were also asked about their desired communication approach regarding counterfeiting and piracy.

Overview of the set-up:

RESEARCH SE-TUP

- A total of 28 focus groups: 1 focus group of 2 hours in each EU country
- Respondents
  - Mix of age: between 15 and 24 years old
  - Mix of life stage: students + workers
  - Mix of gender: ½ men, ½ women
  - Mix of education: low, medium and high
  - High use of internet and online content
  - All had purchased products online before
- Fieldwork: January 29th 2015 - February 13th 2015

TOPICS

- Journey map for online content and counterfeit goods
- Drivers and barriers for online content and counterfeit goods
- Evaluation of current communication on IP + identification of desired communication approach

3.2 Digital content

Over the past years a general trend has emerged showing that material possessions become less important compared to experiences[9]. People want to experience things (e.g. driving an exciting car) without the hassle that comes with the ownership (e.g. insurance, maintenance, etc.). The same is true for young people and digital content which plays an important part in their life nowadays: young people want to listen to songs, watch films or play games without necessarily owning the song, film or game.

3.2.1 Attitude towards online content offered legally/illegally

In many of the EU Member States, young people indicated during the group discussions that they **do not really care if the digital content** to stream or download **is offered legally or not**. They have the knowledge about the existence of legal and illegal content, but distinguishing between them is not a priority criterion when choosing a specific source. The main reason is that they do not feel any personal harm in streaming or downloading content from illegal sources.

"I download everything I can, the sky is the limit. I do not care about legal issues." (Belgium)

"No one sits by the computer and thinks: Oops, I won't download this because this is an illegal page." (Croatia)

"I care about authors, but not so much that I would pay." (Croatia)

"What matters is if the source has the content I need." (Slovakia)

"It does not matter what kind of sources you use, as long as you have access to what you search for." (Romania)

Streaming and downloading from illegal online sources is widely accepted by young people. It has become part of their daily life and is often not questioned as it is seen as normal behaviour. Illegal sources providing content have always been part of the internet for as long as they can remember.

9 GfK Global Consumer Trends Report – Roper, 2014

"This is how I grew up; when I was young I did not have a credit card or any money on me so I went on the internet and obviously opted for free stuff. I grew up in this way, so now..." (France)

"I've been doing it so long, it seems normal, it seems legal." (UK)

From the discussions with the 15-24 year olds it is clear that many of them are aware when they are accessing illegal sources providing digital content, and so in principle they know that they are part of an illegal process when using these sources. Only in Poland and Croatia do young people find the legislative framework on legal and illegal sources for digital online content unclear. Some of the participants in Croatia even believe that they do not have any restriction at all on offers of digital content and so they do not feel the need to care about the legality of a source.
Spontaneously, young people gave many reasons to **justify** the use of illegal sources for accessing digital content on the internet:

JUSTIFICATIONS FOR USE OF ILLEGAL ONLINE CONTENT

Financial reasons

- *"I am a student, I do not have the money to pay for legal content"*
- *"The economy is not doing well, so we do not have money for legal content"*
- *"Legal content is too expensive"*
- *"I don´t want to pay for a movie that could be bad"*
- *"Why pay if I can also get it for free? Internet is a free of charge world"*

Relativising impact of illegal content

- *"What is one illegal download? Who is going to miss that money?"*
- *"Others do pay for online content, so I do not have to do it"*
- *"All these artists make enough money, they don't need more"*

Relativising of illegal character

- *"If I only use the content myself, it is not illegal"*
- *"It is possible, so it is not really wrong"*
- *"I do not make money with it, so it is not illegal"*

Relativising of their own behaviour

- *"I only do it occasionally"*
- *"Everybody does it, it is normal"*

Although many of the young people in the focus groups have heard about the **concept of IP** and also what it means in relation to the use of online content, their knowledge is rather limited. They are aware that if they access content from an illegal source, artists miss out on income. But they do not know how the remuneration system works: they have for example no idea about the YouTube monetisation procedures or about the Spotify revenue mechanism. Also, some of the participants believe that buying content

from legal sources generates more profit for distributors and middlemen than for artists.

"I think that every time you watch a YouTube video or you listen to a song on Spotify, the artist gets some cents... but I'm not sure about how it works." (Italy)

"It would be interesting to learn what the consequences of illegal downloading or buying knockoffs are. I believe this results in bad things, but still do not fully understand it. I am not entirely sure how it affects producers, entrepreneurs, musicians, writers." (Latvia)

"Someone will always lose money ... but the authors won't lose millions if I download something once." (Luxembourg)

"They just know that a CD costs PLN 30, but an artist will get PLN 1 for it." (Poland)

"People say you're ripping off the artist but you're not ripping off the artist you're ripping off the (record) label." (Ireland)

The **consequences** of accessing content via illegal sources are very abstract as the risk of getting caught and being penalised are practically non-existent.

"We know we could do it without any negative consequences, so we do it. If things change [e.g. there are sanctions], we won't." (Bulgaria)

This does not mean, however, that using digital content from illegal sources is considered as mainstream behaviour in all countries. In countries such as Finland and Germany, the use of digital content from legal sources is "the way to go". In these countries, websites that offer digital content on a legal basis have been on the market longer. Besides their long-time integration, legal sources in these countries are not only numerous, they also provide a broad and recent offer.
In poorer countries or countries with a struggling economy, it became clear in the focus groups that the use of illegal sources for digital content is basically the only option young people consider. Possibly due to low income and a lack of legal options, users are driven towards online sources that provide digital content offered for free.

"If I had to buy all the series I want to see, I would have to be a millionaire." (Portugal)

"You do not see the stick, only the carrot." (Poland)

"It is something you just do not do, it is against the law." (Germany)

3.2.2 Identification of websites with content offered legally/illegally

When asked which websites provide content legally and which websites offer content illegally, the young people, to a certain extent, were able to answer, but only after having thought about it. In countries where illegally provided content is considered mainstream, the young people in the focus groups found it harder to distinguish websites offering content legally from websites offering content illegally.

All in all, quite a few of the young people indicated that they are still unsure about what content or activity is legal or not.

"We are even unable to say what is legal and what is not, because this information is not given. It has not been regulated well enough, so we have doubts. Even if you want to think about that, you can never be sure if the thing you download is legal or not." (Poland)

"You need to do a bit of fiddling to get onto the BBC IPlayer ... so not sure what the legality of that is." (Ireland)

Websites that only offer the possibility to **stream** are in general perceived as websites that offer digital content on a legal basis. Young people assume that as long as no content is downloaded, it is legal for the end user to watch, listen, play or read.

"If I am not keeping it, then technically I am just borrowing it." (UK)

Only some of the young people gave this more thought and evaluated sources such as YouTube for example. By looking at this kind of website, they realised that streaming websites can also provide content in an illegal way.

"There are grey areas, you can go onto YouTube to match something and YouTube isn't an illegal website but somebody may have uploaded something illegally. You can also download from YouTube, I am not sure if that is legal." (Ireland)

The boxes below present the aspects young people use to **distinguish** between websites providing digital content legally and websites offering digital content illegally:

WEBSITES WITH LEGAL CONTENT	WEBSITES WITH ILLEGAL CONTENT
• Payment required • Advertisements before streaming content • Streaming • Good content quality • Popular websites • Media campaigns to promote the websites • Rights are shown	• Messy, non-professional website design • Lots of advertisements, banners and pop-ups • Torrent software required • Limited download speed and interruptions • Up-to-date and broad content offer

Having to **pay** for digital content is a good indicator to distinguish legal from illegal sources. However, paying for downloading digital content is not exclusive to legal sources. Some websites providing digital content on an illegal base will charge the user in return for faster download speed.

"When you pay for something it is legal." (France)

As it is not always clearly stated, if the content offered by a website is rights-owned (most websites do not clearly mention if their content is legal or not), young people mainly distinguish legal from illegal sources on their **layout and advertisements**. A messy layout, less user-friendly se-tup and a lot of pop-ups indicate to them, it is an illegal source for digital content.

"When they are official sources, all that advertisement seldom appears." (Portugal)

"If I search for something and a couple of windows pop-up with advertising, then I assume that the site isn't totally legal." (Austria)

"If you visit a website and other ten windows are shown up, I don't think that the webpage is legal." (Bulgaria)

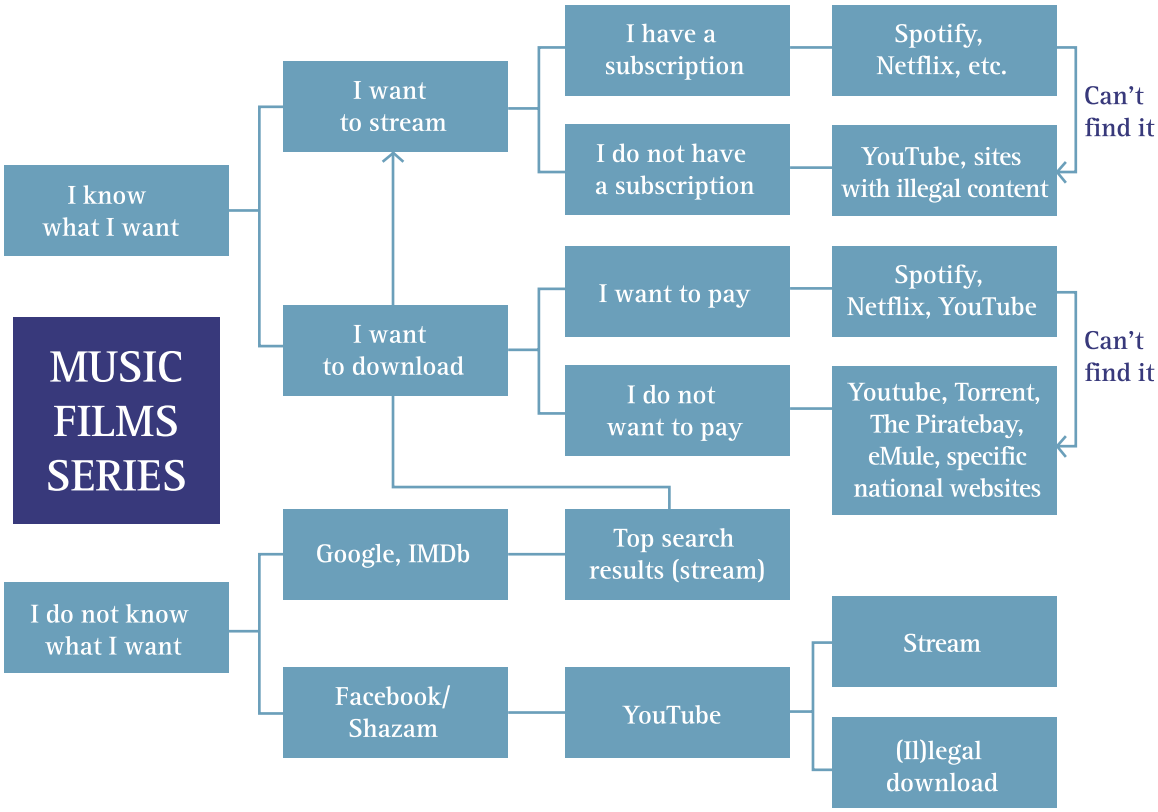
Another criterion young people said for using a website is the "**popularity of the website** on Google". If a website is in the top search results, young people assume that it is a website offering digital content on a legal basis. The same method is used to evaluate the safety of a website offering digital content. If a website does not show up in the

top of the search results, they do not trust the website and they will access the content they want from other websites.

3.2.3 Journey map

Overall, the search process for online content starts with knowing or not knowing what you are looking for. If you know, you go directly to a specific website. If not, Google or social media are used to find new digital content. Then, the journey map of young people differs depending on the category of digital content they are looking for.

A. Journey map for music, films and series



The search process for music, films or series is highly comparable. The search is **often deliberate**; young people already know what content they want. They also rely on a shortlist of specific sites they consult for online content.

If young people do not specifically know what they are searching for, they either consult

Facebook or Shazam, or they use a search engine. For the latter, Google was the only **search engine** mentioned by the participants in the focus groups. When looking for a certain song, they insert for example a part of the lyrics and will use Google to find a source (URL) where they can access the song (either by streaming or downloading). The same method is used when searching for a specific film without knowing or remembering its title. By using keywords or the names of actors, for instance, Google will lead them to a source offering the film.

Young people said that they also used Google for a deliberate search process. In this case, participants reported they type in the title of the song or the film they want and add "download for free" or a similar description.

Another option is that they enter the title of the song or the film they want to hear or see and add "YouTube" or the name of another website. They use Google in their search process as Google is considered reliable in providing the right websites matching their search.

YouTube is both used in a legal and an illegal way. Some young people only use it to stream; others also use add-blockers or download songs from YouTube via a convertor. While the converters themselves may not be illegal, the converting by the user and the storage of the converted file on the user's device puts the individual in a liable situation.

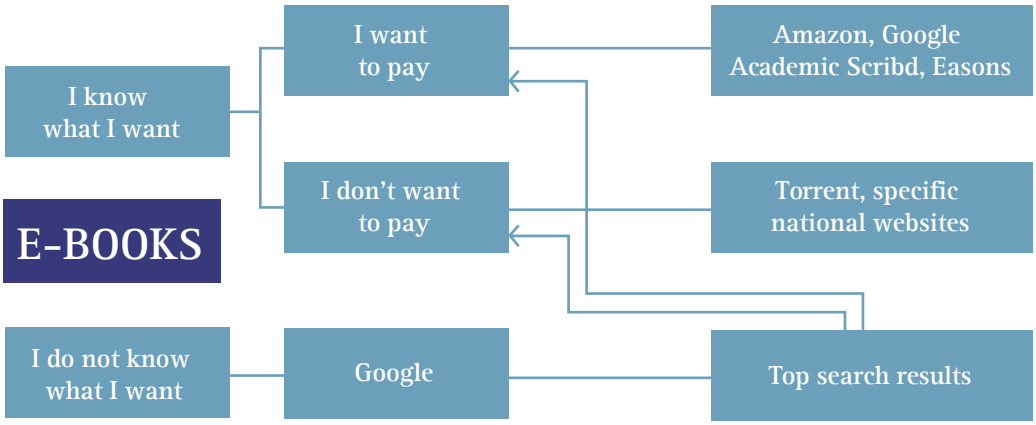
Facebook also has a significant role in the search process of young people, who like to share music and films online with their friends and appreciate the references, feedback and suggestions of their friends. **Sharing** digital content in the peer group is very important for young people.

From the focus group sessions, it became clear that also in countries where the use of legal sources for digital content is more likely to be mainstream behaviour, websites providing content on an illegal basis are still used. However, these websites are only used as an alternative in case the other legal sources do not offer the desired content.

"If I'm trying to find something obscure and it's not on Netflix then I'll look for it on an illegal site." (UK)

B. Journey map for e-books

The discussion groups in the EU28 showed that e-readers are **not commonly used** among young people. Only a few of the participants reported to have e-readers.
In contrast to music, films or series, the 15-24 year olds mentioned more legal than illegal sources to stream or download books. Therefore, they are more likely to end up with e-books that are accessed or obtained legally.



"You can get an eCopy of any book illegally but by Googling it." (Ireland)

"I download books only the legal way. Swapping to a Kindle seems weird and it seems to take longer and I do not know how to download them on an illegal site so I just pay for them." (UK)

Feedback from peers and reviews on websites are very important when buying e-books. As it is not possible to stream or download an e-book before buying it, young people are inclined to look for reviews and evaluations of others to avoid being disappointed in the purchase of a specific book.

C. Journey map for games

When it comes down to games, **'legal'** seems to be the only option young people go for. The participants in the sessions indicated that in most cases they do not even consider illegal options for games and thus they know none or only a limited number of channels that offer game content illegally.
One reason for this is that online games are often multi-player games. When you do not obtain them legally, you cannot interact with other players.

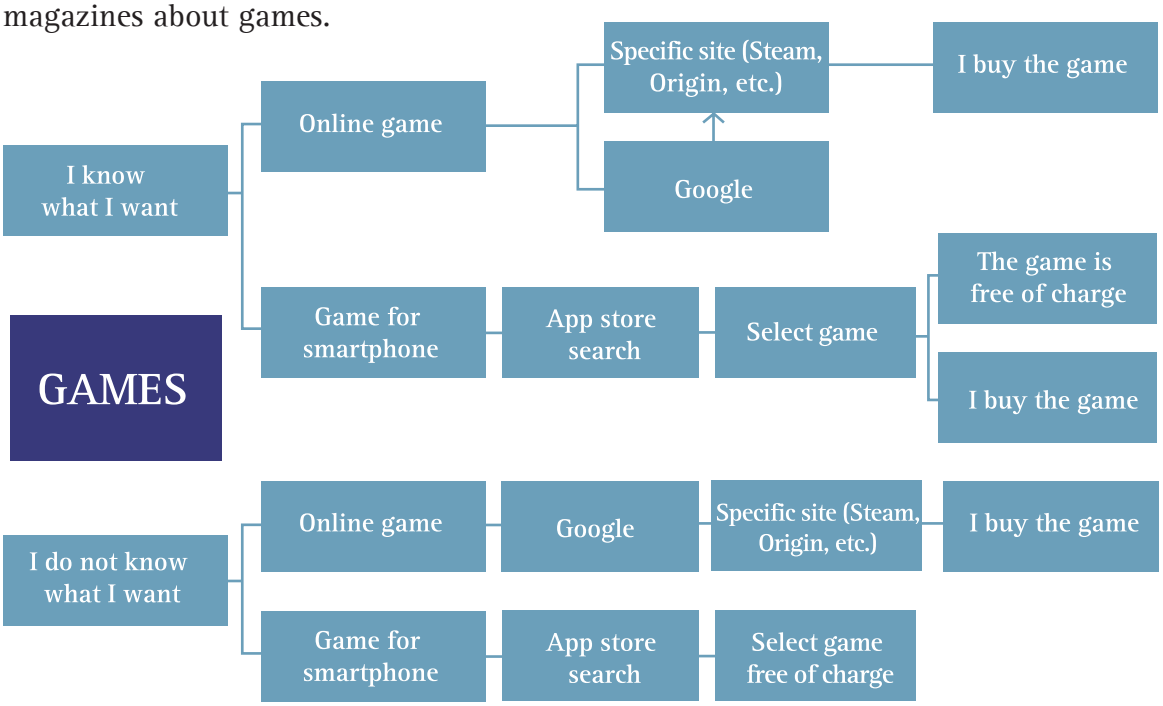
"I play massively multiplayer online games, only accessible through legal means, so illegality seems less relevant. You can create a private server on world of Warcraft which is illegal, but nobody does that because it is no fun." (Ireland)

Another reason for the prevalence of legally obtained games seems to be the large offer of smartphone games that are available for free via legal purchase channels (e.g. Samsung play stores). These games, such as Candy Crush for example, are popular they said because they are simple and easy to play, are used to pass time and are available for free.

Young people also explain their purchase of games as a long-term investment. Music and films, on the one hand, are "throw away" content, content that is constantly replaced by new content because one gets tired of them quite quickly. Games, on the other hand, are used over a much longer period of time. Therefore it makes more sense for gamers to spend money and buy the games legally.

But in addition to this, participants also indicated that it is not 'mainstream' to make use of illegal offers of games. As their peers do not do this, the participants are more likely not to do this either.

To avoid the risk of spending money on a game they do not like, participants attach high value to **feedback** from peers and information and reviews on blogs or in online magazines about games.

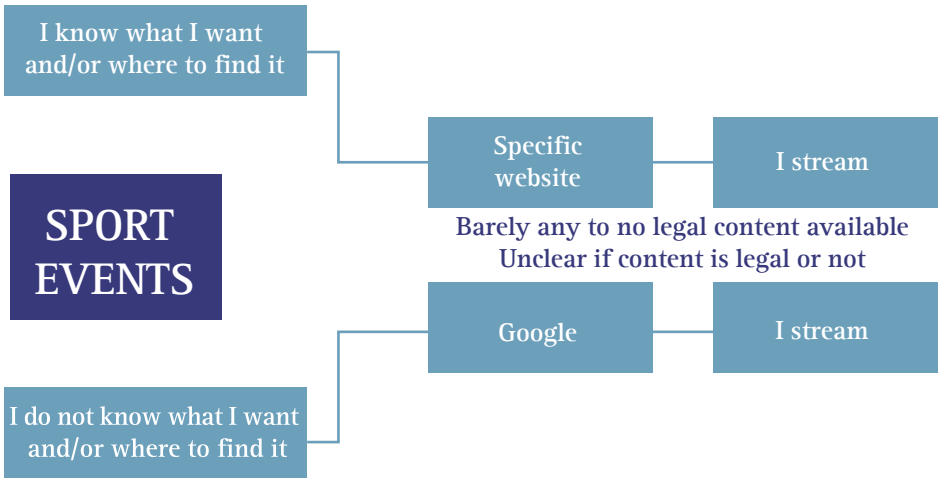


D. Journey map for sport events

In relation to sport events, young Europeans reported that these are **only streamed**, never downloaded, as the content is only viewed once.

"If you are watching a football match, you just want to stream it. It has no use after that." (UK)

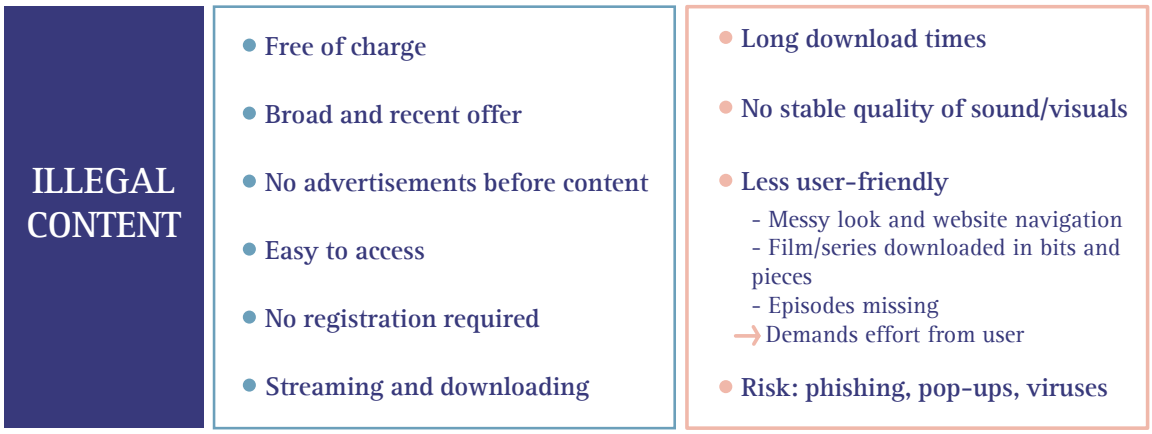
When looking for specific sport events, young people said they most often do not know where to find them on the internet. Therefore most of them use a **search engine** to facilitate their search for sport events. By doing this, they end up at sites they are not familiar with and so they are not sure if the content they are accessing is provided legally or not. But as they do not know any alternatives, they keep using their current channels. To avoid shady websites containing potentially malicious software, they reported they only select sources from the top suggestions of the search engine. These top results are considered to be "safe" as it indicates, according to them, that many people have used them before.



3.2.4 Drivers and barriers for online content offered legally/illegally

Although many young people said during the discussions that they do not care that much about whether the digital content is offered legally or not, they are able to point out clear strengths and weaknesses of websites that offer content legally and those that do not.

Strengths and weaknesses of websites that offer content illegally



"I can see whatever I want online, if it is not very good, the loss is not great."
(Portugal)

Young people in the EU indicated that websites offering digital content illegally are considered to be **free of charge** and **advertisement-free** (meaning no advertisements before being able to access the content). Both appear to be the main reasons why young people choose these sources. But as well as that, the offer provided by these websites is also a main driver: illegal sources have a broader and more up-to-date **offer**, so argued the participants involved in this study.

They also mentioned that the main reason to stay away from websites that offer content illegally would be the **risk** involved using these sources. The risk does not relate to being caught or being fined but to viruses and phishing files causing harm to their devices. This seems to suggest that young Europeans fear potential personal damage (viruses etc.) more than legislation. But in most countries even this **risk does not outweigh the advantage** of getting advertisement-free content without having to pay for it - while, for example, Spotify and YouTube offer legal content for free but push advertisements.

If these downsides of illegal sources did not drive young people to use legal alternatives, it would probably be the lack of **user-friendliness** of the websites on which illegal offers can be found. Young Europeans said that they experience long download times frequently or that they are not able to download the film as one file (only in smaller pieces). Other problems they indicated: not being able to find the right subtitles, episodes of series that are missing. In the discussions it became clear that these elements annoy young people the most when using illegal sources.

In relation to these downsides, the young people in the focus groups expressed their need for **ease of use**. All-in-one solutions seem to be preferred: these are solutions where they can find both music, films and series (and to a lesser extent also e-books), where they can easily share content with friends, where they get suggestions for new content and which allow them to access content both at home and on the go. However, these needs are opposed to their desire to get digital content for free.

This brings us to sources that offer digital content legally. The participants in the study reported that legal sources offer more ease of use: they are reliable, have fast download speed and sharing options. Downsides of the legal sources are, according to the participants, the costs and the limited offer they have. Their offer is also not up-to-date enough. Also, in a minority of the countries, no or too few legal alternatives are available (e.g. in Croatia, Bulgaria, Estonia). This is especially the case for films and series; for music, legal alternatives are most often available.

Strengths and weaknesses of websites that offer content legally

LEGAL CONTENT	• Good sound and image quality • Easy to use and navigate • Reliable • Fast download speed • Guaranteed content • Can be free of charge (when accepting advertisements) • Sharing options	• Costs (or advertisements) • Sign-up required (privacy issues) • Offer: lack of variety and recent content • Availability

In several countries **privacy issues** are mentioned by the participants. Websites that provide digital content legally tend to require registration, signing up or membership (e.g. Netflix) and not all young people have trust in what will be done with personal data. Especially in countries where illegal alternatives are favoured, this trust is low. This seems partially a justification for their choice of illegal channels but it also fits in a general reluctance to provide personal information online, as became clear during the discussions. Several participants noticed that information on their online behaviour and consumption of digital content via legal sources was sold as personalised advertisements, and this eventually occurred on their Facebook or other social network accounts.
Other websites offer content on a legal basis and for free, but in return the consumers have to watch/listen to advertisements before they can access the content. The

participants in the focus groups clearly indicated they weren't keen on these **advertisements**, and **ad blockers** are commonly used: higher usage in countries that favour illegal sources and higher usage among the younger participants.

3.2.5 Further motivation to access online content offered legally

"I go for Netflix. Too many times I've had a movie crap out on me midway." (Ireland)

"I used Torrent until Netflix and Google Play came along... It's better service and it's cheap enough to be able to pay for it. I care about convenience, quality and availability." (Finland)

"I do not want to give up on quality." (Netherlands)

"My laptop always gets viruses and the whole things goes do slow after I've watched something on an illegal site, so I just pay for things now." (UK)

Young people perceive the lack of **availability** as a bigger issue than the price they may have to pay for legal offers. Only in countries with a broad and varied legal offer embedded in the download/streaming landscape legal options are really considered, and their usage is high.
In countries with a high usage of legal sources, legally offered content is considered **"standard"**. Participants in these countries said that all their friends and relatives use legal sources, and so do they. In the other countries, legal sources are not considered by participants since their friends or family members don't use them either.

Table 1 Countries where either legal or illegal sources are considered to be 'standard' – qualitative research

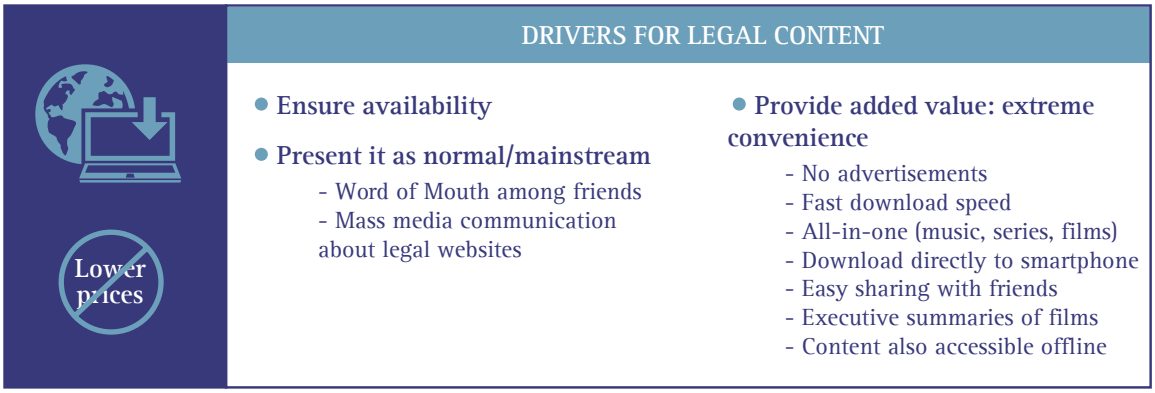
Country	Legal or illegal sources considered to be 'standard'	Country	Legal or illegal sources considered to be 'standard'
Austria	Legal	Italy	Legal and illegal
Belgium	Illegal	Latvia	Illegal
Bulgaria	Illegal	Lithuania	Illegal
Croatia	Illegal	Luxembourg	Illegal
Cyprus	Illegal	Malta	Illegal
Czech Republic	Illegal	Netherlands	Illegal
Denmark	Legal	Poland	Illegal
Estonia	Illegal	Portugal	Illegal
Finland	Legal	Romania	Illegal
France	Illegal	Slovakia	Illegal
Germany	Legal	Slovenia	Illegal
Greece	Illegal	Spain	Illegal
Hungary	Illegal	Sweden	Legal
Ireland	Illegal	United Kingdom	Illegal

Young people tend to consider sources for digital content for different reasons: they know about these channels via their friends, these channels are amongst the top results in a search engine and/or they hear about these channels via mass communication.
To promote legal offers, it therefore appears important that these sources become part of the communication amongst friends or within peer groups, and that these sources show up in the top search results and that they are highly visible in mass media.

Of course a reasonable **price** for the use of digital content is very important. Prices for legally available content are not always considered to be too high by young people, but if they have to combine several subscriptions to have a vast and up-to-date offer, the cost for legally available content becomes high, they say. To avoid high cost and multiple memberships, young people turn to digital content that is offered illegally.
However, this does not simply imply that lowering the price for legally obtainable content will make more young people choose legal sources, not while they have a free alternative via illegal sources.

"Even if it cost only 2€, I am not sure we would go for it if there is also a free alternative. Even a really drastic price reduction would not have any impact if the same quality is available for free. For the time being, and for as long as the system continues to function well, there is no reason for me to stop." (France)

To stimulate the use of legally provided content, the focus group outcomes suggest that it may be more effective to emphasise the ease of use on websites offering content on a legal basis, rather than focussing solely on price. It became very clear during the discussion sessions that the convenience offered by legal sources compared to the clumsy and chaotic illegal sources can convince heavy users to choose the legal alternative.



3.3 Online purchase of physical goods

3.3.1 Attitude towards online purchase of physical goods

Young Europeans said in the EU focus groups that they **only occasionally** purchase physical goods online. The **products** they purchase the most online are:

• The number one category of products purchased online is fashion, comprising clothing, footwear and accessories such as handbags, watches, and jewellery.

• Second, is books (hard copies).

• Third, is sportswear and sports equipment, comprising football shirts and boots as well as equipment such as boxing gloves and surfboards.

• A fourth, is small electronic devices and accessories. Small electronic devices are mobile phones, tablets, laptops, audio and video equipment and headphones. Accessories are smartphone covers, rechargers, USB sticks, earphones, etc.

• A final category of products that young people report to purchase online is the category of tickets. Such tickets concern public transportation (bus, metro, and tram), air travel tickets and tickets for events such as theatre and concerts.

Other product categories mentioned by young people, yet less frequently, are: games, DVDs and CDs; pet products and accessories; cosmetics, make-up and perfume; car, bike and motorcycle equipment and accessories; subscriptions to magazines; food and wine; musical instruments.
Based on the group sessions the **main drivers** for young people to purchase products online can be identified as:

MORE CONVENIENT	CHEAPER	WIDER CHOICE
• Saving time and effort: no transportation, no queues • Anytime, anywhere	• Products can be found cheaper online than in-store	• Larger assortment of products online than in-store

• The first main reason for shopping online instead of offline is **convenience**. Shoppers save time and effort through online shopping, avoiding transportation time and costs and queuing. Furthermore, online shopping is not restricted to a particular place and time: participants can fit it into their schedule as they like.

• To be able to find products for a **cheaper price** is a second main reason for young people to resort to online shopping. Young people associate online shopping with better prices for the same products that can be found in-store; the internet (e.g.

Google Shopping) also allows quick price comparison of different online stores and picking the one offering the best deal.

- Finally, young people resort to online shopping when they feel that online shops offer a **larger choice of products** than brick and mortar stores or when a brand they like is not sold in-store in their country.

Nevertheless, young people in the focus groups displayed a very **careful attitude** regarding the online purchase of physical goods. When considering an online purchase, they are very careful regarding the type of website where they place the order. They have a **basic degree of distrust** regarding online purchases; their **main concerns** or the **main barriers** vis-à-vis online shopping are uncertainty regarding the quality of the goods, uncertainty regarding the security of online payments, and uncertainty regarding correct and timely delivery. They are aware the risk of having their accounts abused and potentially losing large amounts of money.

What young people seem to lack at this point is **reassurance regarding the safety of online shopping.** Since they cannot touch the product they want to purchase, they have difficulty assessing the quality of the product. Again young people are aware of the risks associated with the delivery of the goods when buying online and believe there is always a risk of the product not being delivered or of incorrect and untimely deliveries.

"When buying something I prefer to go to the shop to try it, see it, to see how it looks on me." (Cyprus)

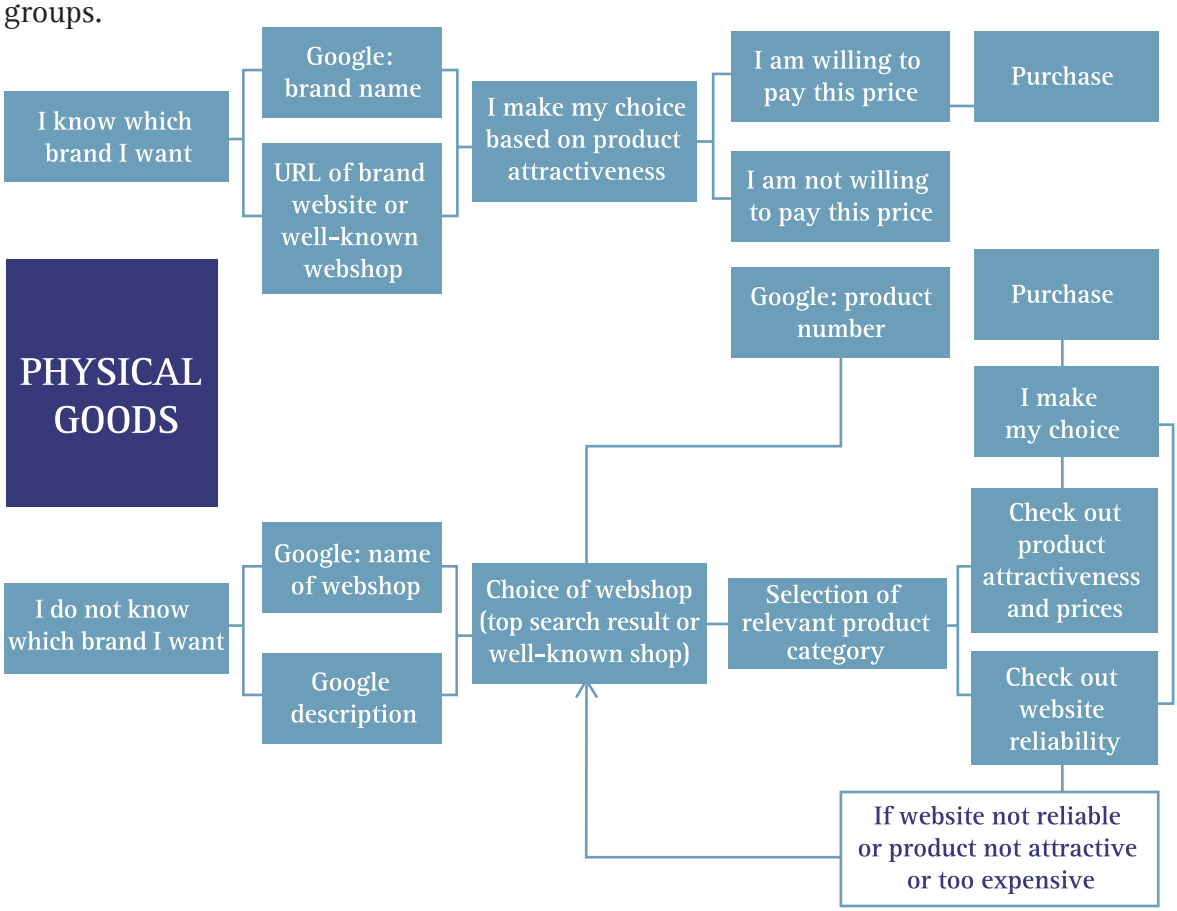
"It's dodgier than just watching something in a shop. You're spending money on something which could be potentially awful." (UK)

"A friend of mine said she would never buy shoes or purses online, even for instance from Berschka or Stradivarius, because she noticed that products offered at regular stores are of far higher quality than those sold online." (Poland)

Each time they buy a product online young people feel that they risk safety problems (e.g. hacking of bank accounts) or may become the victim of fraud (e.g. not receiving the product, not receiving the correct product). The shopping journey outlined below shows how young people go about the shopping journey to avoid the potential problems.

3.3.2 Journey map for online purchases of physical goods

As mentioned above, young people in Europe appear to act very carefully when purchasing goods online. The purchase journey below shows that **the way in which young people start a purchase journey slightly differs depending on how well they know what they are looking for**; but in most cases their **journey results in purchasing goods in a webshop that they know and are familiar with**. Should they encounter a website they do not know, they report to consciously look for signs that it is reliable. The scheme below pictures the purchase journeys as they were outlined in the focus groups.



Those **young people who know exactly which brand they would like to purchase often start their purchase journey on the official brand website**. They are drawn to

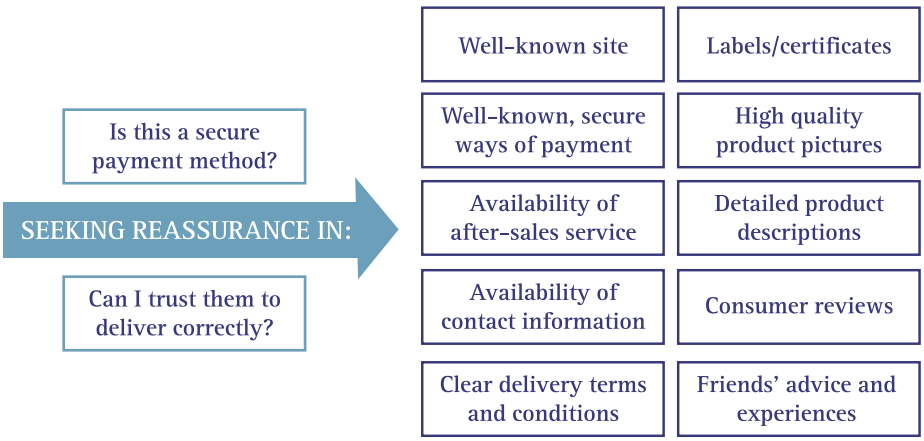
these websites in two ways: they either enter the brand name in Google to find the official site or directly type the official brand website's URL in the browser address bar. Examples of brands that were frequently mentioned in the focus groups are Zara, Chanel, Michael Kors (for handbags), Swatch, Festina and Casio (for watches).

On the official brand website, they browse the catalogue for the different products on offer and choose a product based on the product's attractiveness. The price is only considered after having chosen a product on its likeability. In the next phase, the focus of the search is the price. In rare cases, the price of the chosen product offered by the brand website is believed to be good and young people proceed to check-out and purchase. In most cases, the price is considered too high as young people said they believe that they will be able to find the product for a better price at an alternative online store. To look for a better deal for the same product, they, for example, write down the product's reference number and enter this exact number in Google. Among the search results, they pick the sites of well-known webshops (e.g. Zalando, Amazon, Sports Direct or more local webshops such as asos.com for the UK and Ireland, e-clothes.gr for Greece, hodinky.sk for Slovakia and madosguru.lt for Lithuania) and compare the price for the product on each of those websites. From this point the price determines the webshop they will use to purchase the chosen product. As price is an important determinant in the choice, it may also be the initiator for suspicion. Products offered on alternative webshops at a very cheap price, significantly lower than the price on well-known sites and not consistent with the brand's reputation, are considered as suspicious. In those cases, young people said, they look for a balance between price and reliability/credibility.

Young people who do not have a specific brand in mind start their purchase journey on Google. For young people, Google is clearly the prime option among all search engines; no other search engines were mentioned in the focus groups. Some young people do use specific applications like Google Shopping to organise their search. Again, young people proceed their purchase journey in two ways. Some will enter a description of the product that they want to find in the Google search bar. They use very general terms such as 'watch' or enter more specific descriptions, e.g. 'golden watch' or 'leather bag'. Among the Google search results, they are most likely to pick the website of a well-known web shop like Amazon, Zalando and eBay or local variants of webshops. A minority browse webshops they are not familiar with or do not even know. Some young people use the advertisements shown on their screen as a result from the Google search to continue their journey, opposed to other young people who indicate that they consciously avoid sponsored search results.

Those who enter the name of a well-known webshop in Google often choose shops such as Zalando, Amazon, eBay or a local webshop. A minority browse the online catalogue of stores that also have a physical high-street retail presence (e.g. Zara, Mango, Media Markt).

From here on, the purchase journey of young people looks very similar. When they are in the webshop, they browse the catalogue for the relevant product category and start their comparison of products based on product pictures on the one hand and prices on the other hand. After a first brief look at the variety of available products and the corresponding prices, those who pick a webshop they are not familiar with start a reliability check for the webshop. As mentioned earlier, young people have three major concerns for which they check: 1) the quality of the products on offer, 2) the security of payment method, and 3) the security of correct delivery. Also when evaluating a webshop on reliability, young people rely on signs to decide whether a webshop is reliable or not.



If they do not trust a particular website after having checked the above website characteristics, they go back to the Google search results to continue the search. If uncertain about the reliability of the webshop, they may look at different webshops before making a final decision. When they have found a product that they think is of good quality and is on offer at a good (but credible) price, they proceed to purchase.

Overall, young people were observed **to easily find their way** throughout the different steps in the purchase journey, although there is a difference between those who have previous experience with online purchases and those who have little or no experience. The experienced group is more likely to start the purchase journey on a particular webshop or website while the less experienced group is more likely to start their

purchase journey by typing keywords or a product description in Google. But neither has difficulty navigating the Google search results, finding a webshop or navigating brand and webshop catalogues. **However**, they do feel somewhat **unsure when it comes to deciding whether a webshop can be trusted** (when guarantees are provided regarding product quality, payment security and delivery). Therefore, they then decide to purchase through a well-known webshop.
Very few young people considered buying counterfeit products during the shopping exercise in the focus group sessions. Most were very **cautiously avoided the purchase of counterfeit products**. They reported accordingly that they do not know where to find counterfeit products. When asked how they would search for fake products they did not really have a procedure in their toolbox to start looking for these products. During the focus groups some participants suggested to add the term 'fake' to the product name in the search engine when looking for counterfeit products.

The **differences between the purchase journey of buying a product for oneself or for others** (such as during the shopping exercise) are as follows:

- In some countries, there is a tendency for young people to purchase a counterfeit product for oneself rather than for someone else as a present needs to have some standing. On the contrary, in other countries young people would say just the opposite. They would rather buy a counterfeit product for someone else than for themselves, especially if the 'someone else' is a middle-aged person, like their parents. In this case, they are not too concerned about whether they purchase an original product or a counterfeit as their mother or father would most likely not notice if it was a counterfeit product, so they said. However, it is important to remember that in most countries, young people would not consider purchasing a counterfeit product whether it is for themselves or for someone else.

- When purchasing an item for themselves young people usually have a more clear idea in mind of what they are looking for (e.g. they have a specific brand in mind). Hence, the start of their purchase journey is often more directed.

- When purchasing an item for themselves, young people are likely to check more websites and to compare more items before proceeding to a purchase. In other words, the purchase process is somewhat simplified when buying for another person than when buying for oneself.

3.3.3 Attitudes towards online purchase of counterfeit goods

Young people seem to have a very clear attitude towards the purchase of counterfeit goods. In most countries, they **consciously avoided purchasing counterfeit products, both online and offline**. Reasons are twofold.
Firstly, young people **expect the quality of counterfeit products to be inferior** to the quality of genuine products. Following on from this perception, they do not want to take the risk of purchasing a product that might not work or might break down very fast. They indicated that they are looking for good-quality products in order to protect themselves from the harm of spending money on an item that has a very short lifespan, or from purchasing a product that might be hazardous for health or safety. It has thus become clear that young people make a **difference between physical goods and online content**. Whether or not the digital content is downloaded in a legal or illegal manner, the content is most likely exactly the same. Yet, when it comes to physical goods, the quality difference between genuine goods and counterfeit goods may be substantial. At the same time no real personal risks are perceived when downloading or accessing digital content from an illegal source. As for physical goods, young people do perceive an actual (financial) risk or harm when purchasing these products.

"Why buy fake products? You know you will get something bad, you won't get good quality." (Sweden)

Secondly, young people explained that they are concerned about their image. They **want their belongings to fit their socio-economic status**. They would feel ashamed if friends found out that the watch they wear or the electronic equipment they use is counterfeit. Their personal image is the second main reason not to purchase counterfeit products.

"I think it's really rare that you'll buy something fake and you can't tell the difference.' (UK)

"Suddenly there is no 't' in the Lacoste name, or the crocodile looks into a different direction, does not have teeth, and then I start suspecting something." (Poland)

REASONS FOR REJECTION OF COUNTERFEIT PRODUCTS

- **Quality concerns**
  - Counterfeit products = inferior quality
    - *Risk in terms of lifespan of the product, safety (e.g. health hazards)*
    - *It makes no sense to spend money on something one knows is of inferior quality*
  - Only worth it if low risk involved
- **Personal image concerns**
  - Wearing or using counterfeit products (esp. clothing and electronics) leads to inferior image of self

The only exception to the above are purchases involving a small amount of money. In such cases, some young people indicated to be willing to risk ending up with a fake product with a (potentially) short lifespan.
In general, young people do not think that purchasing counterfeit products equals a smart purchase, nor do they associate the purchase of counterfeit goods with any form of protest against major brands or the market economy. **The main driver for the minority of young people in Europe who sometimes consciously purchase counterfeit products is the desire to save money.** If they do, they mainly purchase counterfeit mundane/everyday **clothes and (sports) accessories** and **non-durable, low-value items** that are easily replaceable (e.g. smartphone cases, earphones). In this case, the perceived personal risk is small, especially when products are shipped free of charge. Some young people mentioned that they would be tempted to purchase counterfeit goods when there is a significant price difference between the original and the counterfeit product and the counterfeit appears satisfactory in terms of quality and resemblance to the original. Young people are a lot less likely to consider a counterfeit product for expensive products such as electronic devices.

Those who had an experience with counterfeit goods bought online were **well aware that they were not buying genuine products** at the time they ordered them.

"I only paid half the price. It just did not have the symbol on it." (Cyprus)

"It's not that I went out to buy fakes. It just so happened that the fakes were the cheapest." (Ireland)

"I do not know if it was a fake website but it was so much cheaper than other sites. It had a really amateurish layout too, but I bought the necklace and received it and it was fine." (UK)

There seems to be **a slight difference between the online and offline purchase of counterfeit goods.** Some of the young people who rejected the online purchase of counterfeit goods would consider purchasing or have already purchased a counterfeit product on holiday if they accidentally came across it at a local market. If they are able to touch and assess the product on the spot, they might be tempted to buy it. But there does not seem to be a widespread habit of purchasing counterfeit products, both online and offline.

3.3.4 Awareness of channels for online purchase of counterfeit products

There is a **low awareness** among young people **about webshops that sell counterfeit products.** Because of their attitude towards counterfeit goods, many young people said they have never used or looked for one of these shops, and most of them could not spontaneously name one.

Since young people are very careful about where they carry out online purchases, **very few of them have had an experience with receiving a counterfeit product when they thought they had purchased an original one**. Some young people have had various negative experiences with buying products online. The negative experiences include the purchase of mobile phones or clothes that were never received or receiving sub-standard products. In rare cases young people were even involved in a lawsuit against a seller.

"I have ordered stuff online before and it looks nice, then you get it and the material isn't what was described, the stitching isn't great." (UK)

"My mum bought something online and it wasn't the real website and it never arrived but they still took her money so because of that I just avoid anything that looks fake. I do not like losing my money." (UK)

"Once I bought an Adidas jumper that seemed original, everything was just right, the tag was original. And then about 2 years after the purchase the police came to me and I was called to testify. I was a bit nervous on my way to the police station, and they told me that I was the aggrieved party and that there was a lawsuit against the seller, because several hundred people were also taken in." (Poland)

Young people **would experience feelings of disappointment and regret the waste of money** if they found out that a product thought to be original turned out to be

an imitation. If this happened, they said they would take action by contacting the webshop or by returning the item in order to receive a reimbursement. This also explains why the availability of contact details on the website is very important for young people. Websites or webshops without concrete contact details appear suspicious and are not worth the risk. Most of the young people who had a negative experience of this kind filed a complaint and were eventually refunded by the respective webshop. Yet, in other cases, the webshop had been shut down by the time they were able to take action.

3.3.5 Identification of websites selling counterfeit products

Young people indicated during the focus groups that they want to consciously decide whether to buy a counterfeit product or not, and they find it very important to be able to distinguish websites that sell counterfeit products from websites that sell originals. Nevertheless, they find it **very hard to distinguish websites that sell counterfeit products from websites that sell original products.** They have the impression that the difference is sometimes very subtle. Clues which they currently use to distinguish these websites are as follows:

WEBSITES SELLING ORIGINAL PRODUCTS

- Manufacturer's site
- Established online shops
- Lock icon in URL
- Logos/icons (e.g. consumer protection organisation's logo, PayPal logo)
- References to physical store
- Company data (e.g. owner information, Trade Register identification)

Young people screen websites they do not yet know very thoroughly before considering a purchase

WEBSITES SELLING COUNTERFEIT PRODUCTS

- Very low prices ("too good to be true")
- Little product information
- Lots of advertisements, banners and pop-ups on the website
- Messy, non-professional website design
- Vague delivery terms
- No costumer reviews
- No helpdesk/after-sales service
- Unclear return and refund policies
- No contact information
- No company information
- Translation errors
- Goods originating from China, Hong Kong, etc.

Initial clues of whether a website sells original products are found in the **overall look** of a website: an unprofessional design, the use of odd or clashing colour palettes, the

presence of advertisements and translation errors are red flags. However, the look of the site is not considered sufficient enough to decide whether a site sells genuine or counterfeit products. To be sure, the sites have to be more thoroughly investigated. In this phase, the key characteristics in distinguishing webshops selling counterfeit products are the **prices, payment methods, return and refund policies**, the absence or presence of **contact information/an after-sales service**, and the clarity of **delivery terms and conditions**. Furthermore, computer protection programs may warn users when they are accessing a non-trusted website, and young people search online forums for customer reviews on webshops they are not familiar with.

"If it is too cheap to be true, it is too cheap to be true." (Sweden)

"I usually do trust sites with PayPal because if you do not receive the product, you can get a refund." (UK)

"If you find a site offering a product much cheaper than expected, it might be a scam, so you might go to a forum to check it out." (UK)

However, young people **ask for more guidance in the process of identifying websites selling counterfeit goods**, as the section on communication further on in this report shows.

Young people's opinions on the subject of websites selling counterfeit products seem to be dual. On the one hand, young people showed during the discussion sessions a rather indifferent attitude towards other people's purchase of counterfeit products, saying that they do not judge people who purchase counterfeit goods. On the other hand, they said they have **a problem with websites that do not clearly indicate that they are selling counterfeit** products: such webshops try to cheat people by deceiving buyers into purchasing a counterfeit product instead of an original one, putting them at risk in the process.

"As long as you know what you are purchasing, I have no opinion." (Sweden)

"They're just doing the same thing as the big brands, but worse." (Ireland)

3.3.6 Identification of counterfeit products in webshops

Despite exploring websites for clues, young people reported that they do not feel

confident about their ability to identify non-original products. They might be able to unmask shady websites or shops, but they find it **extremely difficult** to distinguish original products from counterfeit products in an online shop. They can only rely on product pictures and prices, which are not compelling enough to tell whether a product is genuine or counterfeit. Therefore, they indicated, they **mainly rely on the same clues they use to assess whether a website is trustworthy or not**. They generally feel that if a website passes the criteria set out above (e.g. it offers secure payment methods, it has a clear return and refund policy, it is clear on delivery terms and conditions, it publishes contact information and offers an after-sales service), the products offered are originals.

The participants in the focus groups also mentioned an **exception to this rule** of thumb: webshops like **eBay**, which are websites where individuals sell products. Although eBay itself is considered a reliable site, they indicated that they do not assume that all products sold on eBay are original, as they do on other webshops such as ASOS, Amazon or Zalando.

> *"I would only use eBay for stuff I'm willing to accept a fake of." (Ireland)*

> *"I'll spend whatever I want on ASOS because I know it's trusted." (UK)*

3.4 Communication regarding piracy and counterfeiting

3.4.1 Familiarity with and attitude towards the IP notion

In general, young people in the focus groups were **not able to define the term IP**, with many of them indicating that they are not familiar at all with the term. The **key components** young people mentioned **to define IP** are:

PROPERTY, BUT NOT PHYSICAL PROPERTY	PROPERTY CANNOT BE REPRODUCED WITHOUT THE AUTHOR'S CONSENT
Associations mainly with: - Music and films - Academic work (plagiarism)	If reproduced without the author's consent, the author is not recompensed for their work

Firstly, they indicated that **the property in question is not like physical property**. The types of property they spontaneously associated the term with are films and music on the one hand (e.g. using Torrent, recording in the cinema, buying bootleg DVDs) and academic work on the other hand. It is no coincidence these are topics that really matter to young people. Secondly, they mentioned that the property **cannot be reproduced without the author giving permission** to do so and that those wishing to copy it should pay a fee to the author.

"It means that a piece of art like a song or a movie belongs to the artist who created it and that they have to pay to use it." (Greece)

"The content of a website is intellectual property and you are not allowed to take over elements of the content on a website without mentioning the source." (Romania)

"A thought or idea that you do not want someone else to take credit for." (UK)

Although not many young people in the focus groups were able to define IP, those who did define it correctly demonstrated that it is possible to communicate the concept of IP to young people. However, many said that they have never seen any communication on the subject.

Furthermore, the focus group sessions showed that young people's **attitude towards IP depends very much on the type of property** under consideration. So for example, they tend not to think of the unauthorised reproduction of music and films as a problem, pointing out that the producers of music and films are wealthy stars or studios that are not particularly harmed by the loss of income resulting from unauthorised reproduction of their work. They seem to disapprove much more the unauthorised reproduction of academic work. With many of the participants in the study being students themselves, they reported feeling personally involved and could imagine better what the consequences of plagiarism, as they call it, would be if it concerned their own IP.

3.4.2 Awareness of current communication on IP

All in all, young people in the focus groups indicated **not** to **actively search for information** on IP and **feel badly informed** on the subject. There is also a lack of awareness of communication on the subject. Many of the participants could not recall having encountered any communication on IP. This was especially the case in, for example, Germany, the Netherlands, Greece, Lithuania, Croatia, Bulgaria and Hungary. The participants that did remember communication on the subject of IP recalled **six types of communication channels**:

• **Television** is a first channel of information for young people. The participants referred, first, to consumer awareness programmes giving very straightforward and factual information on labelling or websites that should not be trusted. They also mentioned government campaigns on piracy they had seen on television.

• **The internet, with social media in particular,** is another important source of information, where consumers share their experience with online purchases, especially negative experiences. In the focus groups, news on the closing of illegal websites – spread on different social media – was recalled.

• The participants also referred to **school** as a source of information. Some remembered a police officer visiting their school to provide information on the subject during class. Some remembered a university class on the subject.

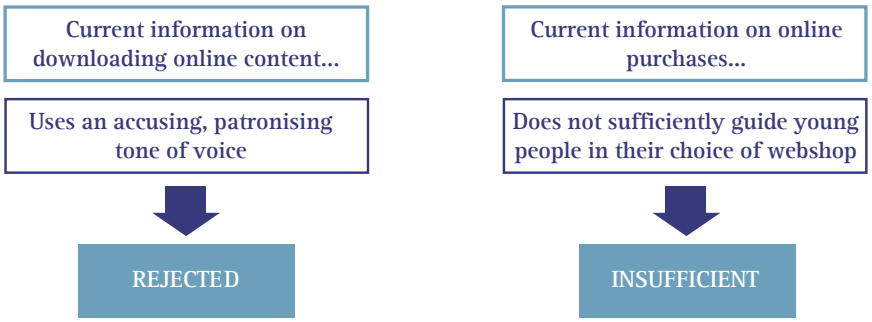
• Next, they recalled anti-piracy messages displayed by **online music services** (YouTube and Spotify in particular) and on **DVDs** (the message stating "You wouldn't steal a car..." is very well known).

• A few respondents referred to national **anti-piracy unions** (e.g. the Protective Union of Authors in the Czech Republic).

"Once I tried to download a song and an announcement appeared on the screen, in which details were stated about the copyright of the song, explaining that it is forbidden to copy and publish it." (Cyprus)

As the list above shows, young people mainly recall information regarding the illegal downloading of online content. Information regarding the purchase of counterfeit goods is much less present in their mind.

The **relevance and usefulness of the information** provided through the above channels is **considered low**. Reasons that were given are the actual content of the information, which is not sufficiently relevant and close enough to young people's lives, and the tone of voice of the information.



During the discussion sessions it was explained that information regarding **the illegal download of online content** uses a **tone of voice** that **arouses resistance**. Firstly, they do not feel being affected by the message that artists lose a lot of money due to illegal downloads because the way the artists act tells them that those artists do not really need the money. They are bored with this message and are turned off by the preachy tone of the message.

Secondly, they reject the comparison of illegal downloading behaviour with theft, which is what happens in the well-known message shown on DVDs ("You wouldn't steal a car..."). The young people said they do not consider the comparison as fair; they do not feel like they are stealing when they are downloading online content from illegal sources. To them, stealing a car or a purse is very different from illegally downloading a film or making a copy of a DVD. The patronising tone of voice in the

message and the fact that it portrays people downloading online content from illegal sources as offenders once again turns them off.

"It's not fair when superrich people complain about penniless children downloading their music." (Finland)

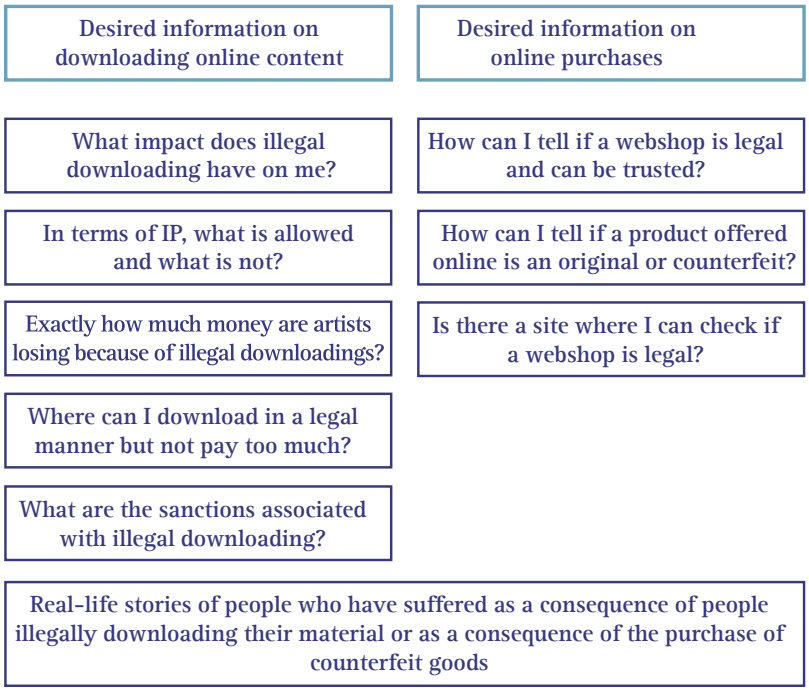
"I'm not a thief!" (Italy)

As said, young people have the impression that there is **little information** available regarding **the purchase of counterfeit goods**. Some recalled information given in a consumer awareness programme on television, which was highly appreciated because of its factual nature, helping people to identify illegal websites or webshops that are known to sell counterfeit goods.

3.4.3 Desired communication regarding IP

A. Preferred message

From the focus groups it became clear that young Europeans' **attitudes towards downloading online content illegally differ from their attitudes towards the online purchase of counterfeit goods**. Whereas illegally downloading online content is widespread and considered acceptable, only a minority consciously engage in the online purchase of counterfeit goods. This observation suggests that communication on the topics needs to focus on different aspects. While communication on illegally downloading online content may need to focus on raising young people's awareness concerning the consequences of their behaviour, communication on the online purchase of counterfeit goods should instead put emphasis on assisting them in their online purchase journeys.



Communication regarding **downloading online content illegally** seems to be the biggest challenge because of the need to raise awareness amongst young people. Young Europeans tend to consider downloading and streaming of online content on an illegal basis as acceptable behaviour and to be desensitised to the dangers and consequences. As a result, communication should focus on raising young people's awareness of the self-evident nature of their behaviour to bring them to question their behaviour.

Young people seem to be open to this type of information, on the condition that such information avoids the accusing tone of voice that characterises current anti-piracy messages. **Neutral information that enables them to form their own opinion** on the matter is welcomed; moralising messages that tell them that illegal downloading is wrong raise resistance, so the focus groups indicated.

"Being told not to do it adds a sense of rebellion to it." (Ireland)

"We just do not know if we are breaking the law by downloading one song, or when we watch a movie or a series without sharing the content." (Poland)

"I went to see a movie with this famous actor, and before the movie his face was displayed and he said 'Thank you for watching this movie in cinema, and not from illegal sources", and that was it. So nobody is criticising you, you just feel that it is good that you watch the film in a movie theatre". (Poland)

"Not in an annoying way like interrupting me doing something online." (Ireland)

The types of information that young people may require are as follows:

- What is IP? What is allowed and what is not allowed? (country-specific)
- What is the impact of a breach of IP rights?
  - What is the impact on the author?
  - What could be the impact on me? (all types of risk, incl. risk of legal sanctions)
- What can I do to respect IP rights, taking into account my limited budget/willingness to pay? Where can I download online content in a legal manner but still not pay too much?

The young people in the study also expressed their preference for **concrete and factual information**. They do not plainly reject messages telling them that authors miss out on royalties because of illegal downloads, but prefer that such information to be very detailed. They want to get a good idea of how big exactly the impact of illegal downloading is. Currently, they do not know the creative process, who is involved in that process and what the monetary impact on these people is exactly.

Finally, the notion of **safety** seems to be crucial in the communication. Informing young people that accessing legally available content means accessing content in a safe manner with no, or strongly reduced, risks of viruses or malware could open them up to acquiring content in a legal manner.

Information needs regarding **the online purchase of counterfeit goods** appear more straightforward. Communication does not need to focus on young people's motivations to buy counterfeit products as the majority already avoid the purchase of counterfeit goods. The young people involved in the study said that they are especially looking for **information that can help them make more informed choices** during the online purchase process; they are in search of certainty and guarantees that they are purchasing an original product. They said they prefer straightforward and factual information that tells them which websites are known to sell counterfeit goods, which webshops are to be avoided and which ones to be trusted, which payment methods are to be avoided and which ones are safe. This information can assist young people in making the right choice among the many webshops available. It helps them to avoid the many potential pitfalls associated with online shopping.

B. Preferred channels/ambassadors

The channels that young people in the study indicated as most appropriate for informing them on IP are:

A **first type of ambassadors** the participants mentioned as suitable for IP-related communication would be **local, emerging artists** (e.g. upcoming local bands and designers). Celebrities such as established musicians/artists are not considered credible for promoting these messages. Their wealth and status reduce their value of aggrieved party. Young people said that they can imagine that their behaviour would have much more of an impact on emerging artists who are struggling to make a living out of their work; they also indicated that they would be inclined to reflect on the topic and their own online habits if they were informed by upcoming artists themselves about the impact of illegal downloading or the purchase of counterfeit products.

"It would be difficult to find someone who didn't come across like they were doing it just for their own benefit." (Ireland)

"With celebrities you know they're getting paid to promote something." (UK)

In a similar way, a **second type of ambassadors** could be **fellow citizens who have suffered from the impact of counterfeiting or illegal downloads**: real consumers, people that young people can relate to because they are much closer to them in terms of lifestyle and status than celebrities or artists. Highlighting the real-life experiences of people who lost their job as a consequence of counterfeiting and illegal downloads or of parents of children who got hurt by a counterfeit toy can make young people realise how those who offer content illegally or who sell counterfeit goods endanger consumers' lives.

"I think that makes it a lot more real." (Ireland)

Schools can be a **third channel** to inform young people about IP-related matters. The participants in the focus groups indicated that they would prefer an **open, interactive**

class discussion on the subject introduced by an expert, or local artists or fellow citizens with a negative experience. Their opinions may be challenged by the opinions of others and it creates awareness and a more conscious attitude. This is also why the respondents were very enthusiastic about the focus groups conducted in the context of this study. The open, non-judgemental discussion made them aware of their behaviour and made them think about the consequences of this behaviour.

Finally, **television and social media** can play a role by **informing young people about the closure of illegal webshops**. Young people in the sessions remembered past messages on the closure of websites or webshops very well; such messages triggered them to pause and consider their own use of such sites.

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4. PART B: Quantitative research – Online Survey

Intellectual Property and Youth

4.1 Introduction

In the previous part of this report, the results of the qualitative research were discussed. In this part, the views of the young generation within the EU are analysed using a representative online survey of young people across the EU28. The questionnaire for the online survey was designed based on the results of the qualitative focus groups and it is used to obtain quantifiable data in addition to the insights obtained during the qualitative research. This approach enables the study to look at the statistical differences between subgroups of young people, and weigh up the significance of their different ideas, perceptions and behaviours.

The consumer panels of GfK took part in the research, with 24,295 young Europeans aged 15 to 24, representing all 28 EU member states, surveyed between 5 May and 6 June 2015. In the three smallest countries (population less than 1 million) the target sample size was 250 respondents, and for the six mid-sized countries (population between 1 and 5 million) the sample was 750, while there were 1,000 respondents from each of the 19 larger countries (population over 5 million). The unweighted sample size for each country is shown in Table 2. The country results presented 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 Sample size per country

Country	Sample size	Country	Sample size
Austria	1,000	Italy	1,000
Belgium	1,001	Latvia	750
Bulgaria	997	Lithuania	755
Croatia	753	Luxembourg	253
Cyprus	250	Malta	250
Czech Republic	1,001	Netherlands	1,001
Denmark	1,000	Poland	1,001
Estonia	748	Portugal	1,001
Finland	1,005	Romania	1,000
France	1,000	Slovakia	1,003
Germany	1,003	Slovenia	761
Greece	1,002	Spain	1,003
Hungary	1,003	Sweden	1,002
Ireland	751	United Kingdom	1,001

In what follows, the results are discussed and differences between subgroups are described if they are statistically significant (at a significance level of ≤0.05), unless mentioned otherwise. The significance level indicates a 5% risk of concluding that a difference between subgroups exists when there is no actual difference. All tables and the questionnaire are further included in Annex 2 and 3. The subgroups that are considered by default are reported in Table 3, 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.

Table 3 Subgroups

Variable	Proportion
Gender	
Male	50%
Female	50%
Age groups	
Teenagers (15-17 year olds)	26%
Young adults (18-21 year olds)	41%
Adults (22-24 year olds)	33%
Education level (undertaking)	
Low (up to lower secondary education)	18%
Medium (up to higher secondary education / vocational training)	49%
High (tertiary education)	33%
Education level (completed)	
Low (up to lower secondary education)	22%
Medium (up to higher secondary education / vocational training)	51%
High (tertiary education)	27%
Employment status	
Student	73%
Employed	14%
Unemployed	6%
Other	7%
Income as student	
Income	50%
No income	50%

The results[10] are presented as follows:

- First, the attitudes and behaviours of young Europeans towards digital content are discussed.
- This is followed by their attitudes and behaviours towards actual physical goods purchased online.
- Subsequently, their ability to distinguish between legal and illegal sources[11] selling genuine and counterfeit goods as well as their ability to identify legal and illegal sources to access digital content is looked at.
- Finally, the report reviews what can be learnt from this study in terms of potentially successful communication messages for young people on the topic of IP infringements.

4.2 Digital content

4.2.1 Usage patterns of digital content

MUSIC IS THE CONTENT MOST FREQUENTLY ACCESSED BY YOUNG PEOPLE IN EUROPE. DIGITAL CONTENT IS MORE OFTEN STREAMED THAN DOWNLOADED. THIS PREFERENCE FOR STREAMING IS DOMINANT ACROSS SOCIO-DEMOGRAPHIC CHARACTERISTICS WITH THE EXCEPTION OF AGE. OLDER AGE GROUPS ARE MORE LIKELY TO DOWNLOAD THEIR CONTENT THAN YOUNGER AGE COHORTS.

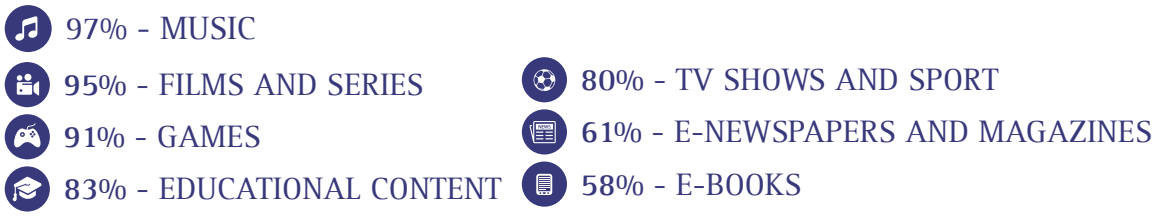
Young people in the EU are very active in accessing digital content and whilst there are certain types of content that young people access more regularly than others, the majority of young people access all of the various types of digital content. In the figure below, the proportion of young people who have used digital content within the past year is presented, categorised by type of content.

Overall, nearly all young people listen to music (97%), watch films and series (95%), or play games (91%) online by either streaming or downloading such content. Whilst not as popular, educational content, TV shows and sports are also accessed online by the vast majority of young people. E-newspapers and magazines or e-books are the least likely types of digital content to be used by young people; nevertheless these types of content are still accessed by the majority of young people.

10 The percentages in this report are given without a decimal and due to rounding percentages may not add up to 100% exactly.

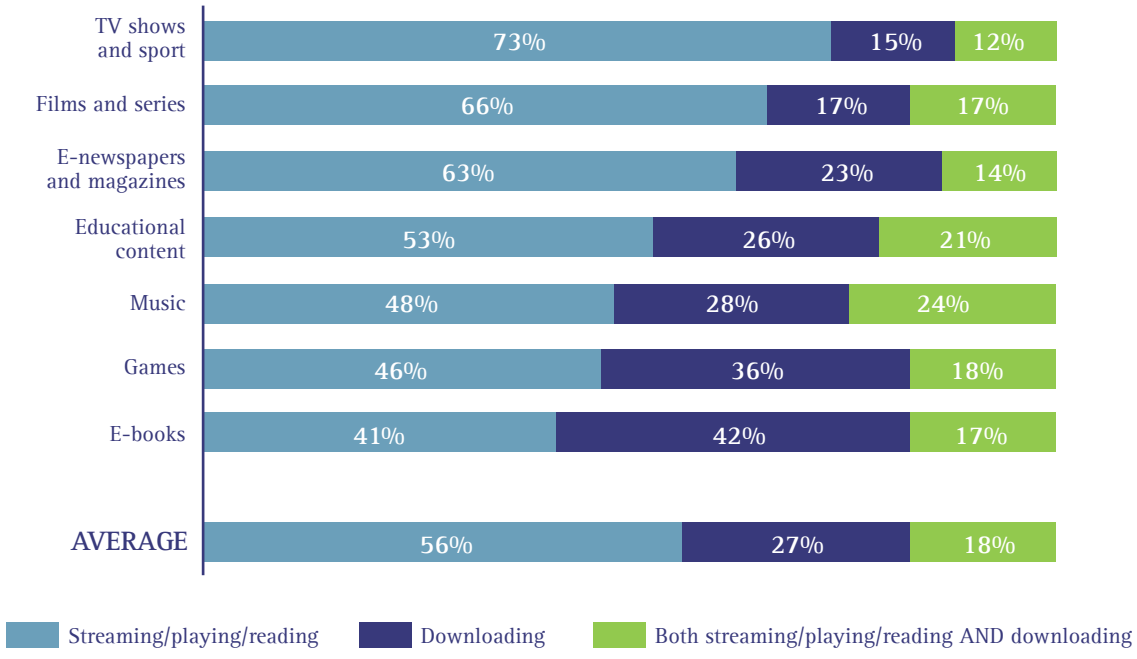
11 Websites like eBay or other 'public' online markets are not addressed in this research. However, these sources can potentially be a forum for sellers of counterfeit goods.

Figure 1. Use of digital content[12]



Music is the digital content most regularly accessed online, with young people accessing it at least every other day (204 days per year). On the other hand, e-newspapers and magazines are accessed only around once a week or less (46 days per year).[13]
Digital content can be streamed without the need to save it on a device such as a smartphone, tablet or laptop, or it can be downloaded. In general, young Europeans have preference to stream rather than download (see Figure 2). However, there are some interesting differences in the preference between streaming and downloading, which is dependent upon the type of digital content they are accessing.

Figure 2 Streaming and/or downloading digital content[14]



12 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=24,295)
13 Usage frequency is calculated by recoding answers to a single unit of "days per year": the answer 'daily use' is multiplied by 365, the answer 'weekly' is multiplied by 52, the answer 'monthly' is multiplied by 12 and the answer 'rarely' is multiplied by 4.
14 Source: Question II3a: What do you do most? Films/series (N=23,134), Music (N=23,558), Games (N=21,740), E-books (N=13,971), E-newspapers and magazines (N=15,008), TV shows and sport (N=19,024), Educational content (N=20,703), Other (N=11,974)

When the characteristics of young people are compared, as illustrated in Table 4, different age groups seem to have different preferences in terms of choosing to either stream or download.

- Teenagers (15-17 year olds) are more likely to stream digital content than young adolescents (18-21 year olds), who in turn are more likely to stream than adults (22-24 year olds).
- Older age groups more often download digital content, the exception being music, which is more often downloaded by teenagers and more often streamed by adults.

Other differences in usage patterns between subgroups, such as gender, education or employment status, are not statistically significant. This means, for instance, that there are no substantial differences to report about the use of digital content between males and females, or students and non-students.

Table 4: Streaming and downloading digital content (age groups)

	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 and sport	76%	74%	71%	12%	15%	16%	13%	12%	12%
E-newspapers and magazines	66%	62%	61%	20%	24%	25%	14%	14%	14%
Films/series	69%	66%	63%	14%	16%	19%	17%	18%	18%
E-books	45%	41%	39%	38%	42%	44%	17%	17%	18%
Educational content	59%	51%	49%	23%	27%	28%	19%	22%	23%
Music	44%	48%	52%	30%	27%	26%	26%	25%	22%
Games	48%	46%	46%	35%	36%	37%	18%	18%	17%

4.2.2 Drivers of accessing digital content

QUALITY, PRICE AND SAFETY ARE THE MOST IMPORTANT ASPECTS WHEN ACCESSING DIGITAL CONTENT, WHILE ONLY 27% OF YOUNG PEOPLE VALUE THE LEGALITY OF THE SOURCE AS IMPORTANT.

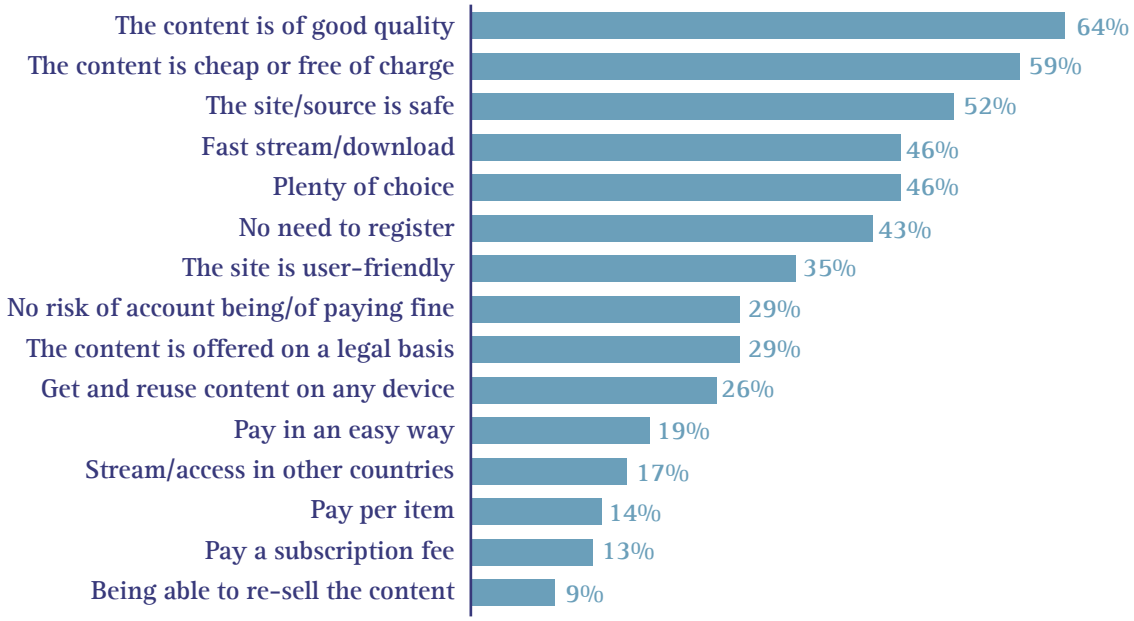
Young people have a clear preference to streaming rather than downloading their digital content, but what drives young people to use certain sources over others? In order to determine what young people consider to be important when deciding which

sources to use, the survey directly asked young people what aspects were more important to them.

Amongst the fifteen various aspects that were examined three specific aspects stand out. These three factors can be understood as being the main drivers which young people take into consideration when making choices about which sources to use when accessing digital content.

- **Quality** is mentioned by two thirds of young people (64%) as an important aspect to take into consideration.
- 59% argue that **price** (the availability of cheap or free digital content) is important to them.
- Around half (52%) say the **safety** of the website or the source of the digital content is important when accessing digital content.

Figure 3 Important aspects when using digital content[15]



Other aspects are valued as being important amongst less than half of young people. These are the streaming/download speed (46%), having plenty of choice of content (46%), and being able to access content without having to register (43%).

There are some gender differences in terms of what aspects drive young people to use certain sources over others when accessing digital content. Teenage girls and young women are more likely to look upon price (61%) and safety (56%) as being more

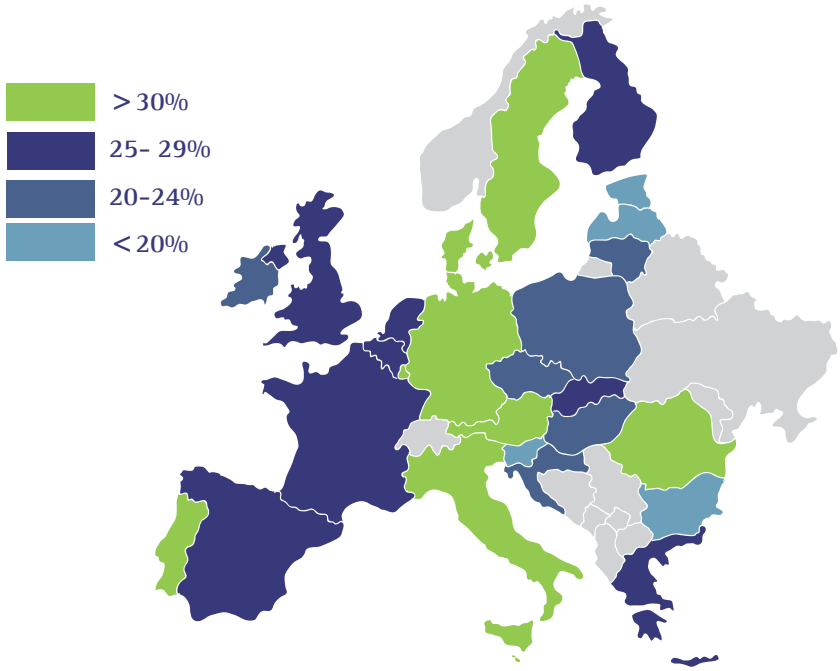
15 Source: Question II4: If you want to use, play, download or stream content from the internet such as ...categories, what is more important to you? Please select 5 things you find most important and rank them in your top 5. (N=24,083)

important than their male counterparts (56% and 47% respectively). Nonetheless, they are also more likely than young males to believe that being able to get digital content without having to register is important (48% against 38%). For males plenty of choice is more often cited as an important aspect than it is their female counterparts (47% against 44%).

The question of young people's attitudes towards the legality of their sources of digital content is interesting to consider. Is the legality of the source something that young people deem to be important when deciding on which sources to use? The results of the survey find that nearly one third (29%) of young people state they consider the legality of the source as important when accessing digital content.

Nevertheless this proportion varies significantly from just 10% in Bulgaria to 41% in Germany.

Figure 4 Proportion of young people for whom the legality of digital content is an important aspect[16]



16 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=24.083)

4.2.3 Accessing digital content – legally or illegally

ONE IN FOUR YOUNG EUROPEANS MAKE INTENTIONAL USE OF ILLEGAL SOURCES. ONE IN FIVE DO NOT KNOW IF THE SOURCES ARE LEGAL OR ILLEGAL.

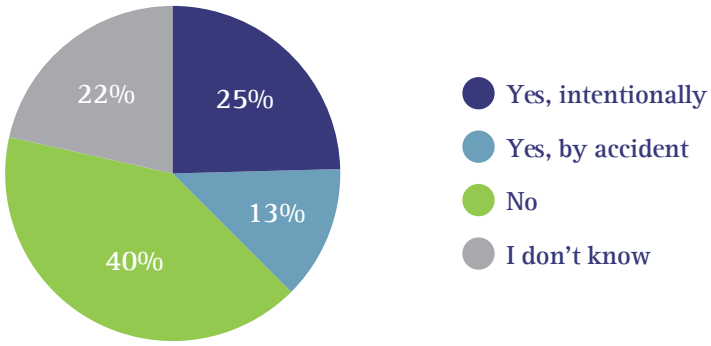
Young people across Europe are prolific users of digital content and have a number of aspects which they deem to be important when deciding which sources to utilise to access that content. The analysis has already found that less than a third of young people believe the legality of the source is important when accessing digital content. Of interest for this study are the intentions and behaviours of young people when accessing digital content. This means not only looking at whether young people think legality is important but also whether illegal sources are intentionally and to what degree? On the basis of asking young people whether they intentionally used illegal sources for digital content in the last 12 months, young people can be identified as those who:

- intentionally use illegal sources to access digital content;
- do not intentionally use illegal sources to access digital content;
- do not know if the sources they use are legal or illegal.

In terms of making a conscious decision, there are those who intentionally decide to use illegal sources to access digital content and those who do not. These two groups are looked at in detail in the remainder of this report, focussing on the drivers behind the choice to either use illegal sources or not. In addition the report looks at what would be the main reasons for them to stop using such sources or, in the case they choose not to use illegal sources, why they would refrain from using them.
Some young people access digital content through illegal sources accidentally. This analysis identifies young people who do not use illegal sources and those who unintentionally used illegal sources as both belonging to the group of those who 'do not intentionally use illegal sources'.

A quarter of young people intentionally used illegal sources to access digital content. However, around half (53%) of young people did not intentionally use illegal sources (i.e. 40% declared not having used illegal sources in the last 12 months and 13% declared having done so by accident). Interestingly, just over one fifth (22%) of young people are unsure if they have utilised illegal sources or not. The breakdown is illustrated in Figure 5.

Figure 5 Used illegal sources to access digital content[17]



Although there is clear intentional usage of illegal sources amongst a quarter of young people, it is rarely the case that young people solely use illegal sources. It is important to mention that the vast majority (81%) in the sample said they also used legal sources for accessing online content. This means that only a minority percentage solely uses illegal sources to access online content.

4.2.4 Young Europeans intentionally accessing digital content from illegal sources

A quarter of young people are intentionally accessing digital content from illegal sources. Looking at who is most likely to use illegal sources, the profile of those intentionally utilising illegal sources is presented in the following table. Those who deliberately use illegal sources when accessing digital content are more likely to be male, higher educated, and students rather than non-students, more often with an income.

17 Source: Question IV2: During the past 12 months, have you used, played, downloaded or streamed content from illegal sources (websites)? (N=24,083) and IV3: Did you use the illegal source(s) (website(s)) for content intentionally? (N=9,907)

Table 5 Proportion of young people who intentionally accessed digital content from illegal sources – profile[18]

Variable	Proportion
Gender	
Male	28%
Female	23%
Education level (undertaking)	
Low (up to lower secondary education)	23%
Medium (up to higher secondary education / vocational training)	26%
High (tertiary education)	32%
Education level (completed)	
Low (up to lower secondary education)	15%
Medium (up to higher secondary education / vocational training)	23%
High (tertiary education)	30%
Employment status	
Student	27%
Employed	23%
Unemployed	21%
Income as student	
Income	29%
No income	23%

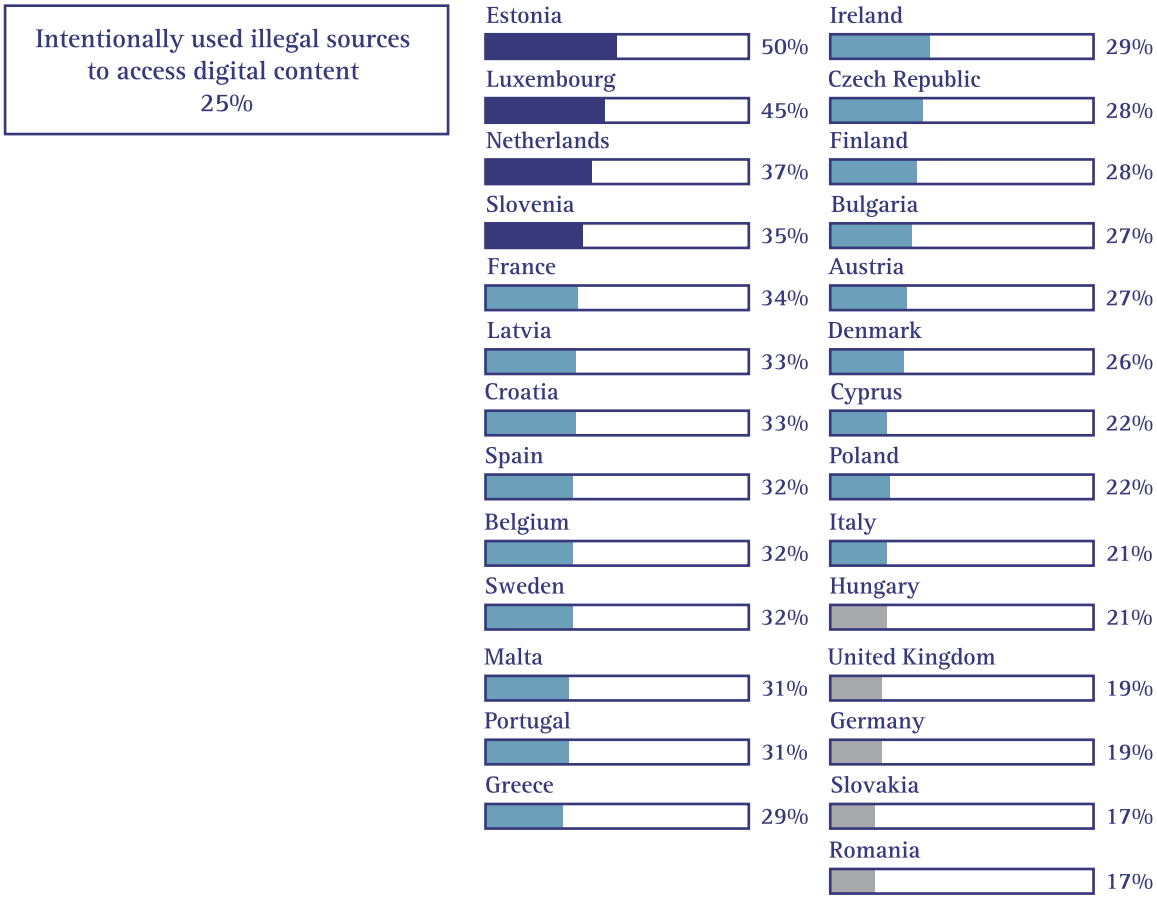
There are also wide variations in these proportions by country (see Figure 6).

• Young people from the Baltic countries are most likely to say they intentionally use illegal sources. For example, 50% in Estonia and 40% Lithuania intentionally use illegal sources.

• This is in comparison to Romania (17%), Slovakia (17%), Germany (19%) and the UK (19%) where one fifth or less of young people intentionally use illegal sources.

18 Source: Question IV2: During the past 12 months, have you used, played, downloaded or streamed content from illegal sources (websites)? (N=24,083) and IV3: Did you use the illegal source(s) (website(s)) for content intentionally? (N=9,907)

Figure 6 Proportion of young people who intentionally accessed digital content from illegal sources per country[19]



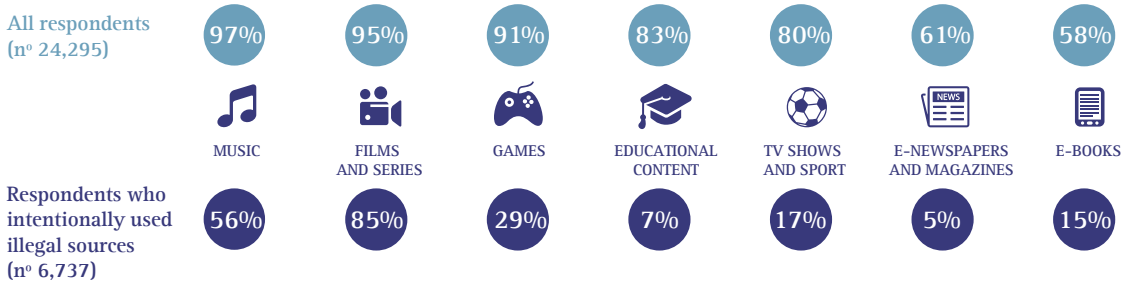
Type of content mostly accessed from illegal sources

Section 4.2.1 presented the overall usage patterns of the types of digital content that young people are accessing in general. However, looking at the types of digital content that young people who intentionally use illegal sources are accessing, a different usage pattern emerges. The large majority of those who intentionally use illegal sources stream or download films and series. Music is the most popular digital content that young people access, with almost all young people streaming or downloading this content. However, only a little over half of young people who use illegal sources are doing so to access music content. Films/series is the second most accessed content, but is, however, the most used through illegal sources. Beside films/series and music, young people who are intentionally using illegal sources are not likely to be doing so

19 Source: Question IV2: During the past 12 months, have you used, played, downloaded or streamed content from illegal sources (websites)? (N=24,083) and IV3: Did you use the illegal source(s) (website(s)) for content intentionally? (N=9,907)

for other types of digital content.
These findings are illustrated in the following figure, which shows the degree to which each digital content type is used by all young people at the top of the figure. The percentages underneath each icon indicate the degree to which these types of digital content are mentioned by those who accessed digital content via illegal sources.

Figure 7 Use of digital content in general and intentional use of digital content from illegal sources[20]

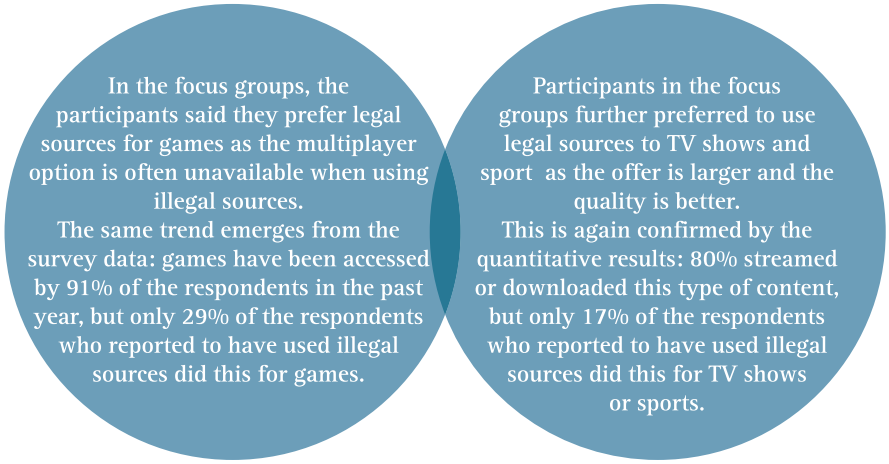


There is limited national variation in the type of digital content most often intentionally accessed via illegal sources. Nevertheless, there are some findings which stand out:

- Of those who use illegal sources, at least 94% access **films and series** in Malta and Croatia, above the European average of 85%.
- Of those who use illegal sources, at least 70% are accessing **music** in Bulgaria, Slovakia and Croatia, clearly above the European average of 56%.
- Of those who use illegal sources, more than 50% are accessing **games** in Hungary, Latvia and Slovakia, compared to the European average of 29%.
- Of those who use illegal sources, more than 29% are accessing **e-books** in Bulgaria, Malta and Spain, around double the European average of 15%.
- Of those who use illegal sources, 10% are accessing **e-newspapers** and magazines, which is more than double the European average of 5%.
- Of those who use illegal sources, more than 30% are accessing **TV shows and sport** in Finland, Ireland and the UK,, which is clearly above the European average of 17%.
- 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 7%.

20 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=24,295) and IV4. Which type of content did you use, play, download or stream intentionally from an illegal source (website)? Please indicate all that apply. (N=6,737)

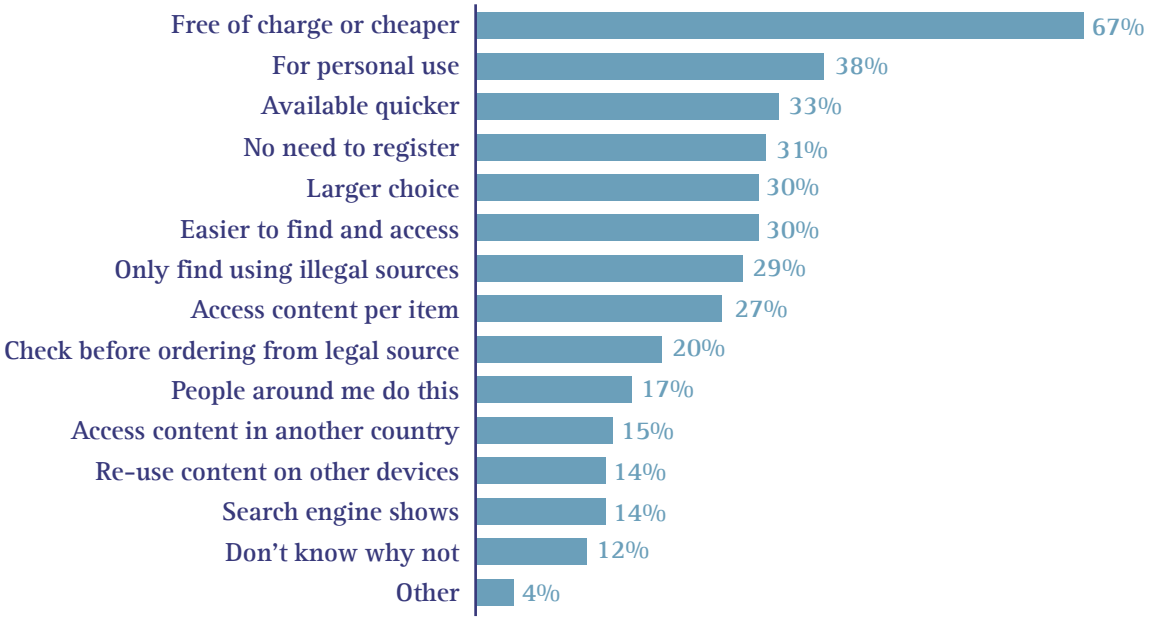
Quantitative results compared to qualitative findings



Reasons to use illegal sources

Young people clearly choose certain types of digital content from illegal rather than legal sources. In order to understand the motivations of young people when making the decision to use illegal sources a number of triggers were assessed (see Figure 8).

Figure 8 Drivers to intentionally use illegal sources[21]



21 Source: Question IV5: You indicated that you have 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=6,737)

The main reason put forward by those who intentionally choose illegal sources is price – more than two thirds of young people state that this is the motivating factor behind their decision to choose illegal sources. However, they also have a variety of other reasons they also consider in addition to price. All the drivers are outlined below:

Price

69% of young people deliberately choose illegal sources because they are free of charge or cheaper. Cost is more often a trigger for female young people rather than male, for students without an income compared to those with an income, for unemployed young people compared to those who are employed, and for young people in higher education. Price is the most important driver in all countries for most young Europeans.

Personal use

40% of young people say they intentionally use illegal sources because they see nothing wrong as long as it is for personal use, an attitude more often expressed by those with a higher level of education. Some national differences emerge: at least half of young people in Croatia, Malta, Slovakia and Slovenia share this attitude, while less than a quarter in Denmark and Sweden agree.

Accessibility

Easier access relates to triggers such as the rapid availability of digital content, no need to register before accessing the digital content, content is easy to find and access, there is a greater choice. Around a third of young people access illegal sources intentionally, because of accessibility triggers, though the proportion is higher among females. 50% or more of young people in Estonia, Latvia and Malta argue that ease of access is an important trigger for them, while in Cyprus and Malta more than half of the young people say that the fact that there is no need to register is an important element in their decision to access content illegally.

Choice

A third (33%) of those surveyed intentionally use illegal sources, in part because they are motivated by the wider choice. This is especially true of female young people in the study, as well as students with an income rather than those without. This trigger is more often mentioned in Sweden and Denmark where it is important for almost half of the respondents polled. In addition, 30 percent of young people also mention that they cannot find the digital content they are searching for on legal sites. As before, it is female young people who mention this barrier more often than their male counterparts.

At the country level, respondents in Estonia, Latvia and the UK are somewhat more likely to mention this factor.

Check content

Finally, 20% of young people (more often male) mention that they use illegal content to perform checks before ordering the content legally. At the country level, this trigger is mentioned by as many as a third of young Europeans in Estonia, Malta and Poland.

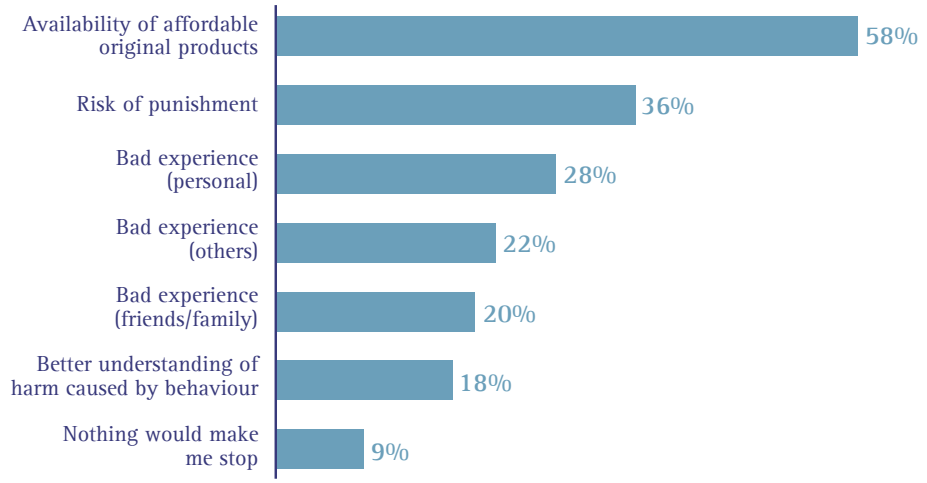
Quantitative results compared to qualitative findings

Reasons to stop using illegal sources

One side of the coin is understanding why young people choose illegal sources. The other is what are the reasons for them to stop using these sources? Understanding the reasons that would deter them is informative when considering both what types of actions can be taken to reduce this behaviour and what messages should be included in communication with young people.

Only 1 in 10 young people who access illegal digital content intentionally say that nothing would make them stop. There are no differences between subgroups in relation to this attitude. Across countries, the proportion of young people with this attitude varies from 4% in Poland to almost 30% in Cyprus and Malta.

Figure 9 Main reasons given to stop using illegal sources to access digital content[22]



The main reasons that would motivate young people to stop using illegal sources to access digital content are outlined as follows:

Availability of an affordable offer

The primary reason given amongst those who intentionally use illegal sources to access digital content is the availability of affordable original products (see Figure 9), echoing the main driver given for why young people choose these sources in the first place. Almost two thirds (58%) of young people would stop using illegal sources if affordable content from legal sources was available.

Price is more often cited as a barrier by female young people, and by young people in higher education. For the younger generation in some countries, this view is even more prevalent, with at least 7 in 10 in Hungary, Poland, Ireland and Denmark mentioning that availability of affordable genuine products would stop them intentionally using illegal digital content.

Risk of punishment

The fear of punishment does not appear to be as big of a concern amongst young people in comparison to price. Slightly more than a third (36%) said they would stop using illegal sources to access digital content because of the risk of punishment. This view is more often expressed by female and by teenagers rather than young adults and adults, and by students. Young people in some countries mention this barrier more often than others, with almost half of those in Slovenia, Croatia, Germany, Denmark

22 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=6,737)

and Luxembourg expressing the view that fear of punishment would make them stop using illegal content.

Negative experiences

Bad experiences can also lead to young people moving away from intentionally accessing illegal digital content in some cases. These bad experiences do not necessarily need to have happened to the young people themselves. The experiences of friends and family could equally influence attitudes towards using illegal sources. Personal bad experiences are more often indicated as a barrier by young females, and by students with an income compared to those without. In some countries, this barrier is even more strongly felt, with almost half of Austrian young people mentioning it, while in Germany and Slovenia the proportion is around 2 in 5.

Understanding

Finally, a better understanding of the harm caused by deliberately accessing illegal digital content would make almost 1 in 5 young people stop this behaviour. This barrier is more often mentioned by respondents in lower rather than higher education.

4.2.5 Young people who do not intentionally access digital content from illegal sources[23]

JUST OVER HALF OF YOUNG PEOPLE (53%) DO NOT INTENTIONALLY USE ILLEGAL SOURCES TO ACCESS DIGITAL CONTENT. OLDER YOUNG PEOPLE (I.E. THOSE AGED 22-24) ARE MOST LIKELY TO SAY THEY DO NOT USE ILLEGAL SOURCES, WITH THE YOUNGEST COHORT MOST LIKELY TO HAVE DONE SO UNINTENTIONALLY. YOUNG PEOPLE WHO DO NOT INTENTIONALLY USE ILLEGAL SOURCES (BUT HAVE DONE SO ACCIDENTALLY) ARE CONCERNED ABOUT THEIR COMPUTERS BECOMING INFECTED BY VIRUSES OR MALWARE AND DO NOT TRUST SUCH SOURCES. THESE ARE THE TOP REASONS GIVEN BY YOUNG PEOPLE TO AVOID ILLEGAL SOURCES.

As previously mentioned, there are two types of young people that make up the group of young people that do not intentionally use illegal sources to access digital content –

23 This includes both those who said they do not use illegal sources and those who said they did so by accident (i.e. they did so unintentionally and therefore can be considered together with those who said they did not).

those who simply do not use these sources and those who do not intentionally access illegal sources but have done so accidentally. Just over half of young people do not intentionally use illegal sources (40% do not use illegal sources and a further 13% do not do so intentionally but did so by accident).

Looking at the profile of those who do not intentionally use illegal sources, some important characteristics come into play. For example, adults are more likely to say they do not use illegal sources. Similarly, amongst those who do not intentionally use illegal sources but have done so by accident, it is least likely to be the adults who have done so (i.e. it is the youngest group who are most likely to have accidentally used illegal sources to access digital content). It is also most likely that lower educated young people are amongst those who say they do not access digital content from illegal sources, or did so accidentally.

There does not appear to be a gender or income component in the general profile of those who do not intentionally use illegal sources. However, those without an income are more likely to say they accidentally accessed illegal content.

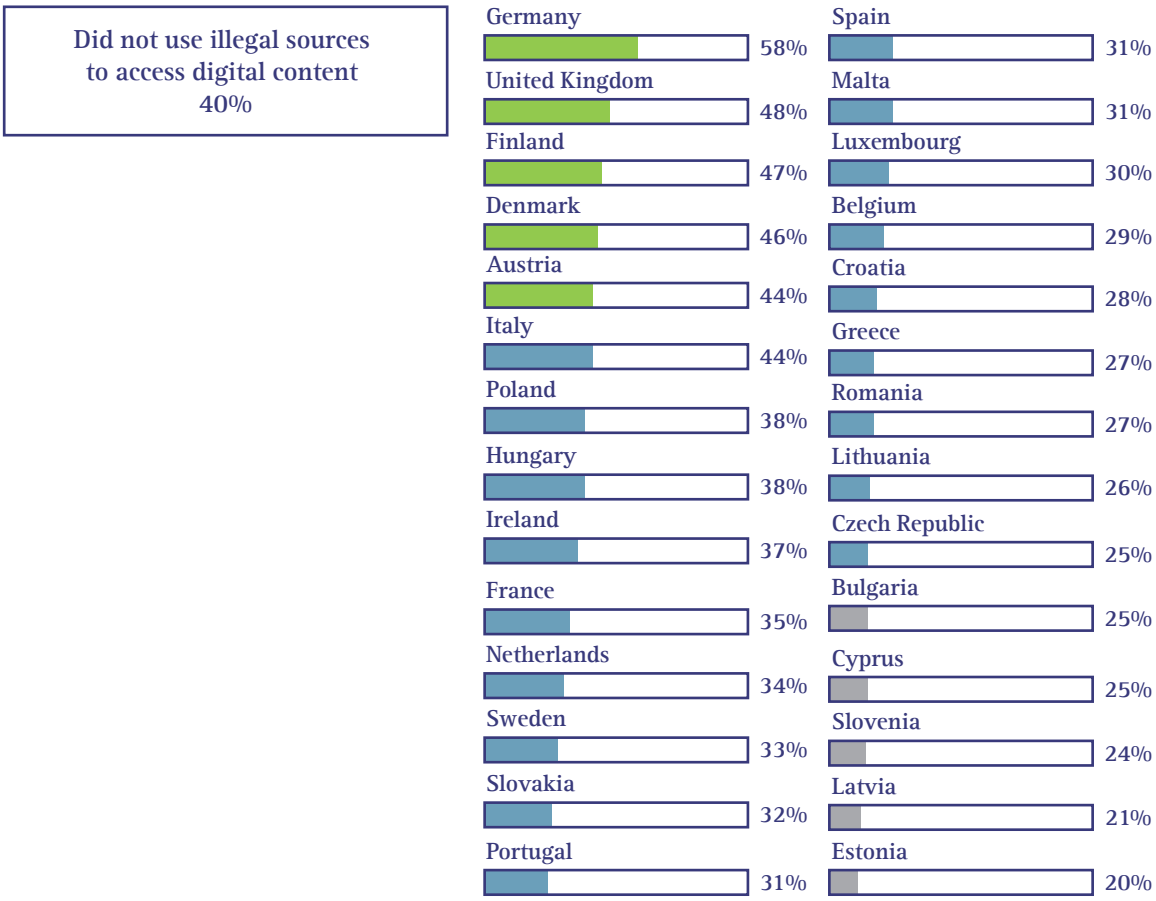
Table 6 Proportion of young people who did not intentionally access digital content from illegal sources – profile[24]

Variable	Proportion of those who did not use illegal sources	Proportion of those who accidentally used illegal sources
Age groups		
Teenagers (15-17 year olds)	38%	15%
Young adults (18-21 year olds)	39%	13%
Adults (22-24 year olds)	42%	6%
Education level (completed)		
Low (up to lower secondary education)	50%	14%
Medium (up to higher secondary education / vocational training)	42%	13%
High (tertiary education)	41%	12%
Employment status		
Student	38%	13%
Employed	45%	13%
Unemployed	42%	14%

24 Source: Question IV2: During the past 12 months, have you used, played, downloaded or streamed content from illegal sources (websites)? (N=24,083)

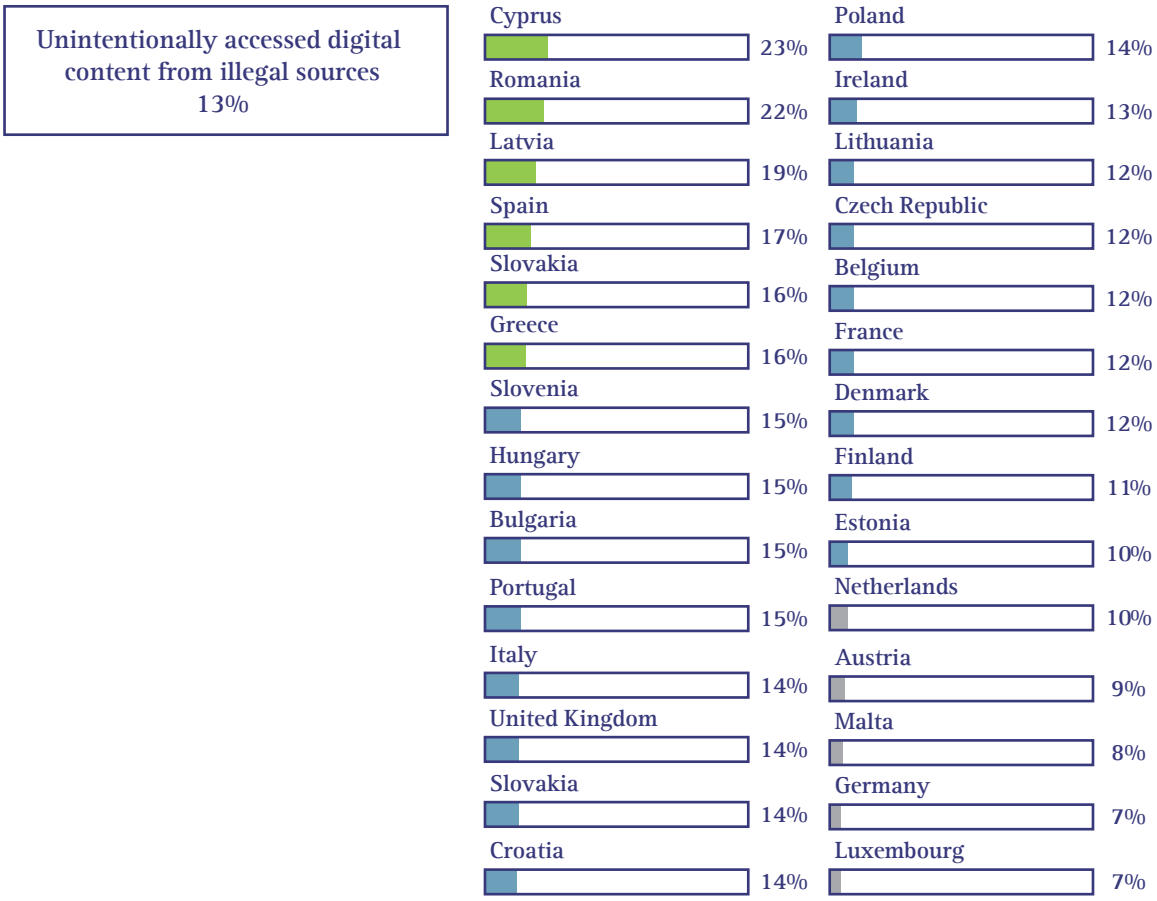
There is, however, some variation between countries. The proportion of those who did not use illegal sources ranges from a minority of 20% of Estonian to 58% of German young people (see Figure 10). The share of young people who unintentionally accessed illegal content by accident ranges from only 7% in Luxembourg to 23% in Cyprus (see Figure 11).

Figure 10 Proportion of young people who did not access digital content from illegal sources per country[25]



25 Source: Question IV2: During the past 12 months, have you used, played, downloaded or streamed content from illegal sources (websites)? (N=24,083) and IV3: Did you use the illegal source(s) (website(s)) for content intentionally? (N=9,907)

Figure 11 Proportion of young people who unintentionally accessed digital content from illegal sources per country[26]



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. This gives an indication of the thought process involved when they are making decisions about which sources to use and make efforts to avoid illegal sources. The top reasons indicated as to why they did not intentionally use illegal sources are related to:

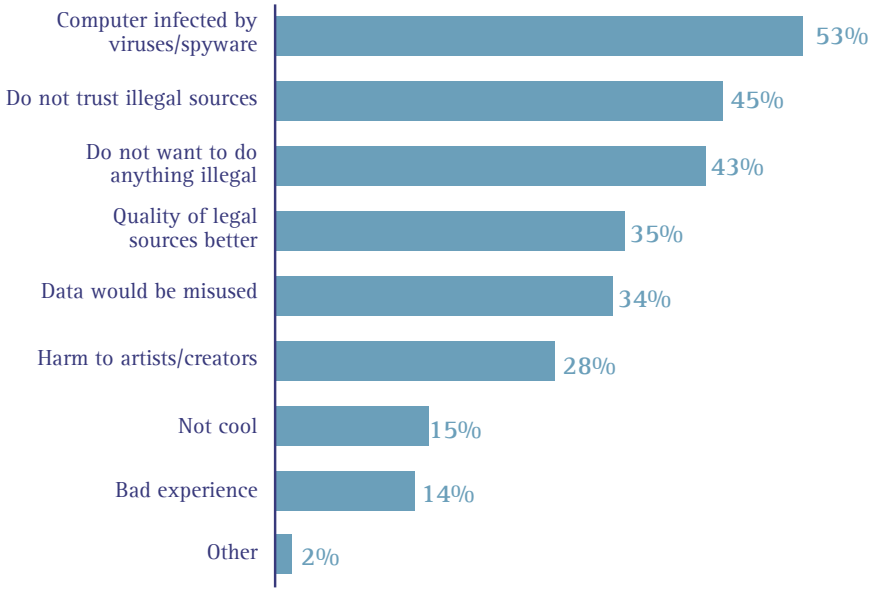
- the fear of the risks posed by viruses or spyware (53%): Young people were concerned about the negative consequences using illegal sources could have for their computer, with half of those young people who accidentally access illegal sources citing this as being the reason they did not want to use illegal sources.
- lack of trust in illegal sources (45%); and

26 Source: Question IV2: During the past 12 months, have you used, played, downloaded or streamed content from illegal sources (websites)? (N=24,083) and IV3: Did you use the illegal source(s) (website(s)) for content intentionally? (N=9,907)

- the fact that they do not wish to be doing anything illegal (43%).

Other reasons given to avoid illegal sources are provided in the figure below. Given that only a small percentage of young people (13%) accidentally accessed digital content through illegal sources it is not possible to confidently report differences dependent upon socio-demographics or geographical locations in terms of why they do not intentionally use illegal sources.

Figure 12 Reasons not to use illegal sources to access digital content[27]



4.2.6 Young people who do not know if the sources they use are legal or illegal

Almost a quarter of young people do not know if they used legal or illegal sources to access digital content. Importantly, it is rarely the case that this is due to the indifference of young people. The vast majority (85%) of those who do not know if the sources they use are illegal or legal cannot determine the legality of the source.

We have seen in Figure 5 that around 1 in 5 (22%) of young people across Europe say they did not know whether they used illegal sources when they accessed digital content. There is significant variation depending on gender, age, educational level and income. Female young people more often than male, and students without an income more often than those with, are not aware whether they are using illegal or legal sources.

27 Source: Question IV7: You indicated that you have not use illegal sources (websites) intentionally for online content during the past 12 months. What was the reason for this? Please indicate all that apply. (N=3,170)

Table 7. Proportion of young people who do not know if they used illegal sources to access digital content – profile[28]

Variable	Proportion
Gender	
Male	18%
Female	26%
Education level (undertaking)	
Low (up to lower secondary education)	23%
Medium (up to higher secondary education / vocational training)	22%
High (tertiary education)	22%
Education level (completed)	
Low (up to lower secondary education)	20%
Medium (up to higher secondary education / vocational training)	22%
High (tertiary education)	17%
Employment status	
Student	22%
Employed	19%
Unemployed	23%
Income as student	
Income	20%
No income	24%

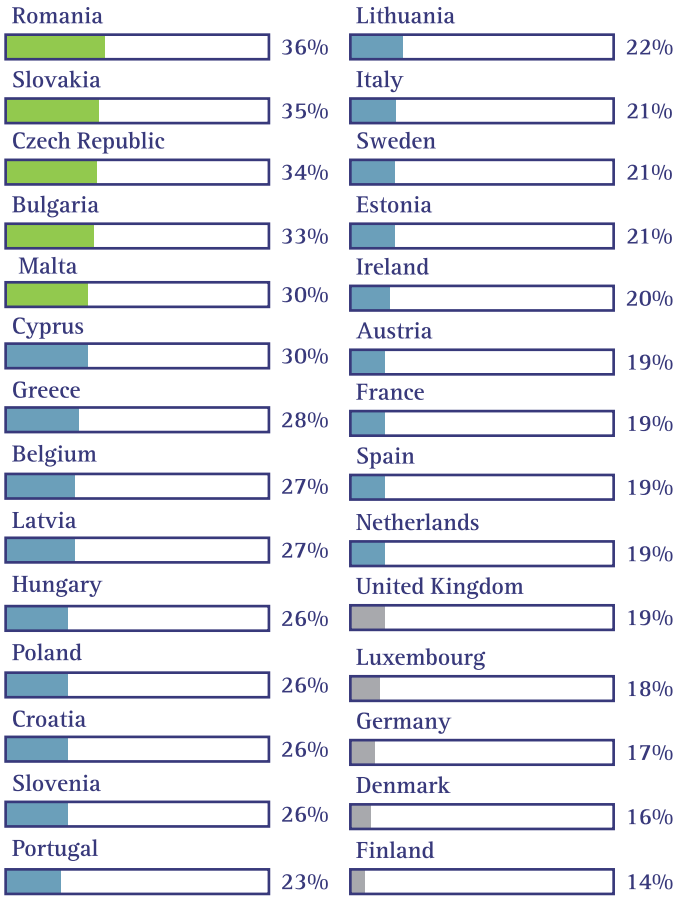
At a country level, the proportions of respondents who do not know whether they access digital content illegally is illustrated in the following figure. The share of young people who are unaware of the legality of their sources ranges from 14% in Finland to 36% in Romania.

In terms of the intentions of those who do not know if they used illegal or legal sources to access online content, it is important to distinguish between those who do not know as they simply do not care or whether it is due to the fact that these young people are unable to distinguish whether the sources are legal or illegal. The findings indicate that the majority of young people who do not know the legality of the sources they used are unable to determine whether the source is legal or not. It is only a small minority of young people who feel indifferent to whether their sources are legal or not, leading to them being unaware of the legality of the sources they use.

28 Source: Question IV2: During the past 12 months, have you used, played, downloaded or streamed content from illegal sources (websites)? (N= 24,083)

Figure 13 Proportion of young people who do not know whether they accessed digital content from illegal sources per country[29]

Do not know whether they used illegal sources to access digital content 22%



4.2.7 Experiences when accessing digital content

MOST YOUNG EUROPEANS ARE FULLY SATISFIED WHEN ACCESSING ONLINE CONTENT, ALTHOUGH 44% OF YOUNG PEOPLE HAVE BEEN SPAMMED AS A RESULT OF ACCESSING DIGITAL CONTENT – THIS INCLUDES BOTH LEGAL AND ILLEGAL SOURCES.

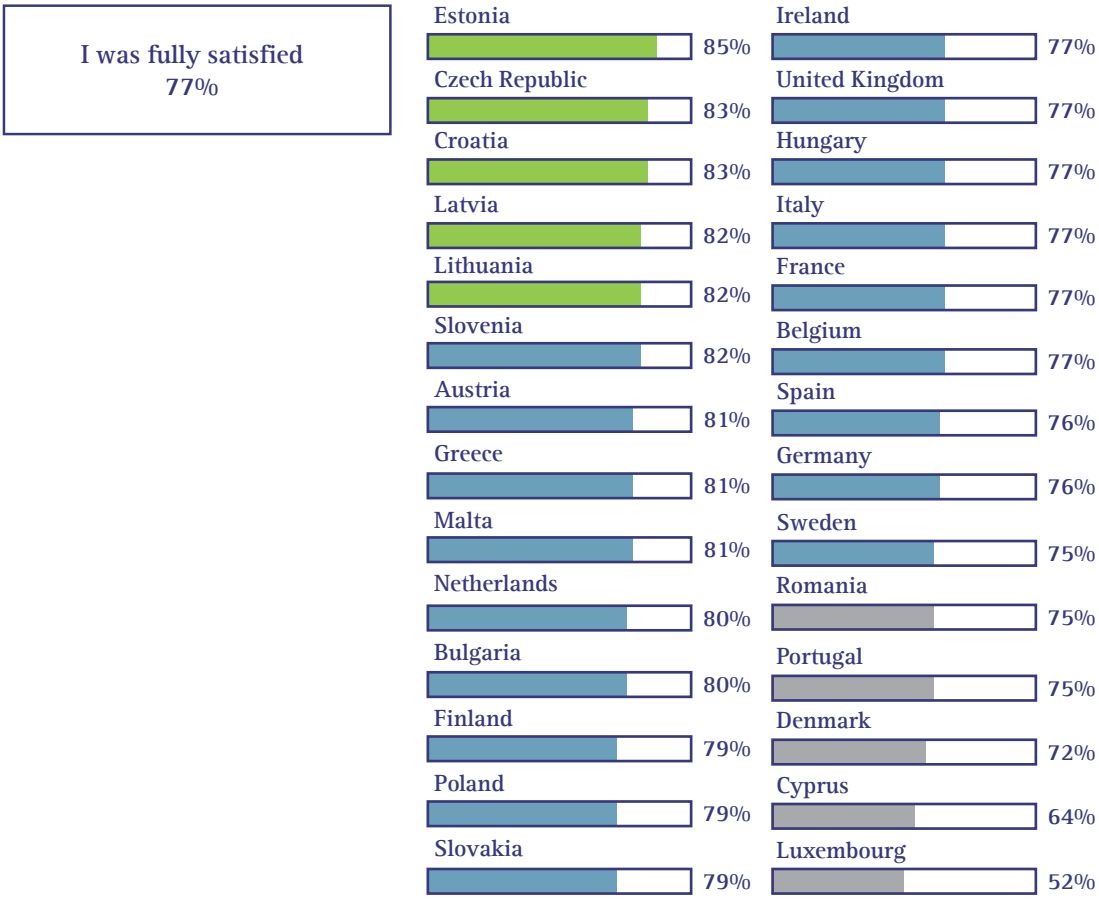
Young people were not only asked about whether they access digital content and whether they use illegal or legal sources to do so. Their experiences of accessing digital content were also captured.

As previously stated, the majority (77%) of young people were, on at least one occasion, fully satisfied when accessing digital content. More often these were females,

29 Source: Question IV2: During the past 12 months, have you used, played, downloaded or streamed content from illegal sources (websites)? (N=24,083)

or unemployed and lower educated respondents who were fully satisfied rather than males, students, and higher educated young people.
Those fully satisfied by their experience form a large majority in Estonia, for example, while only half are fully satisfied in Luxembourg.

Figure 14 Proportion of young people who were fully satisfied at least once when accessing digital content per country[30]



Whilst the vast majority of young people are fully satisfied with their experiences, there are also non-negligible portions who state they experienced a range of negative issues, as illustrated in the following figure.

Nine different issues when accessing digital content were assessed.

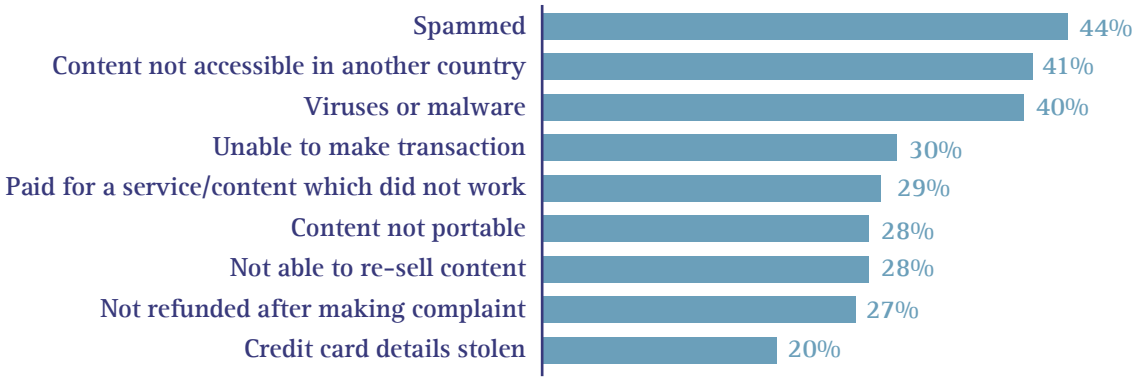
- Overall, 44% said that they were spammed as a result of accessing digital content.
- 41% had problems due to the fact that the digital content was not accessible in their country.

30 Source: Question V1.5: Have the following ever happened to you when you have used, played, downloaded or streamed content online such as: [insert answer categories indicated < 5 in II3]? I was fully satisfied. (N=24,083)

• 40% said that their activities had led to viruses or malware on their computer. A fear of viruses or malware was also mentioned by more than half of those who unintentionally used an illegal source as the reason not to use illegal sources.

• Around 3 in 10 reported that the digital content did not work, was not portable to another device, could not be re-sold, or that costs were not refunded after making a complaint. Although it was the least likely experience, even so 20% of young people reported that their credit card details had been stolen.

Figure 15 Negative experiences when accessing digital content[31]

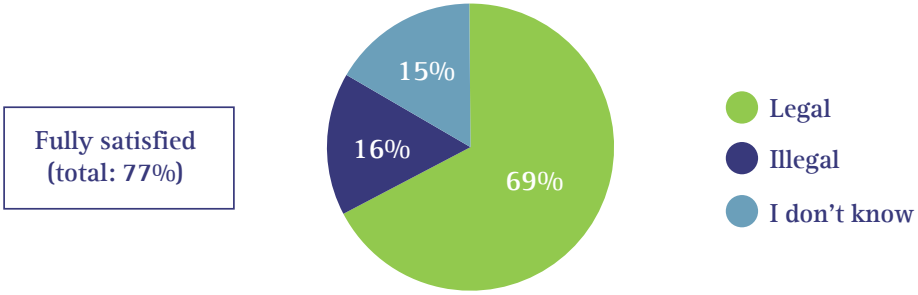


The above refers to experiences of accessing digital content in general. In the following section, these experiences are broken down by content source, whether legal or illegal, or where respondents said they did not know if the source was legal or illegal. Both positive and negative experiences are more often reported as something that happened when they were accessing legal sources. It is not the case that legal sources have more reported problems than illegal sources. Rather, when an experience occurs it is most likely to be on a legal source given that the majority of digital content is accessed legally. That is, it is not surprising that when young people experience a problem it is on a legal source since legal sources are the ones they use the most.

As mentioned, 77% of young people are fully satisfied with their experience of accessing digital content. Breaking this down into whether they used legal or illegal sources, the majority (53% of those who are fully satisfied) used legal sources, with only around 1 in 10 of those who were fully satisfied having used illegal sources.

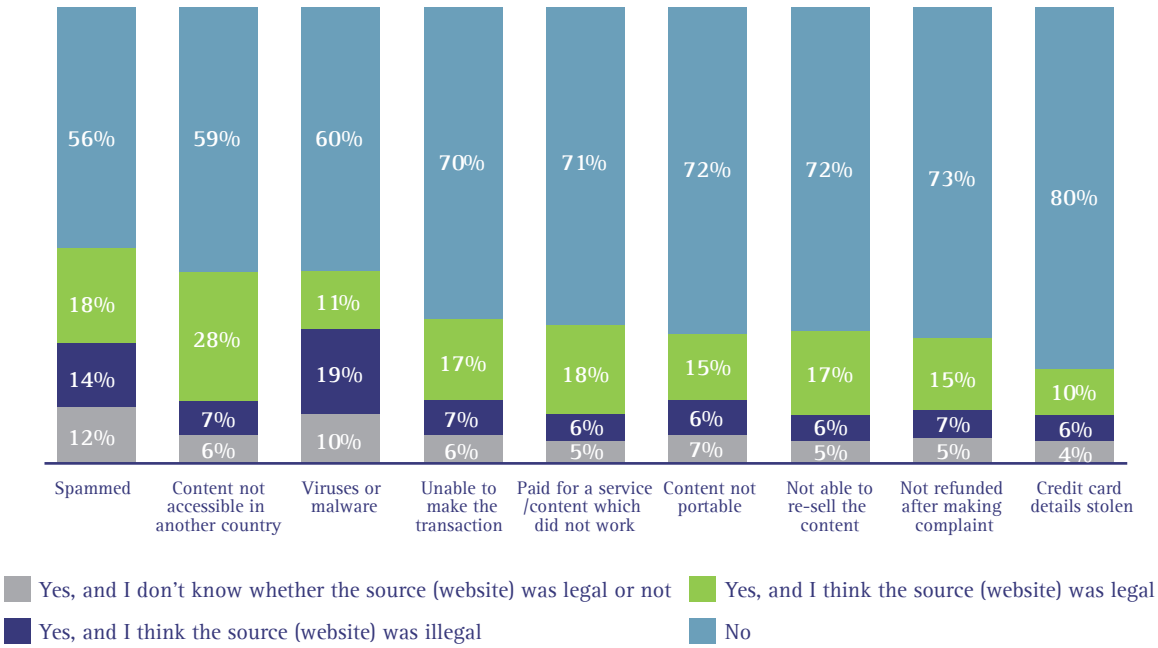
31 Source: Question V1.1 – V1.10: Has the following ever happened to you when you have used, played, downloaded or streamed content online such as: [insert answer categories indicated < 5 in II3]? (N=24,083)

Figure 16 Satisfaction with their experience – legal or illegal sources[32]



Given that legal sources are the preferred option amongst young people, negative experiences are also most likely to be associated with legal sources. Nevertheless, there is one type of experience which is clearly more often an issue when accessing digital content in an illegal manner: infection by viruses and malware. **Almost 1 in 5 of all young people experienced viruses or malware as a result of using illegal sources.**

Figure 17 Negative experiences when accessing digital content and the legality of sources used[33]



32 Source: Question V1.1 – V1.10: Has the following ever happened to you when you have used, played, downloaded or streamed content online such as: [insert answer categories indicated < 5 in II3]? (N=24,083)
33 Source: Question V1.1 – V1.10: Has the following ever happened to you when you have used, played, downloaded or streamed content online such as: [insert answer categories indicated < 5 in II3]? (N=24,083)

4.3 Physical goods

4.3.1 Purchase patterns of physical goods online

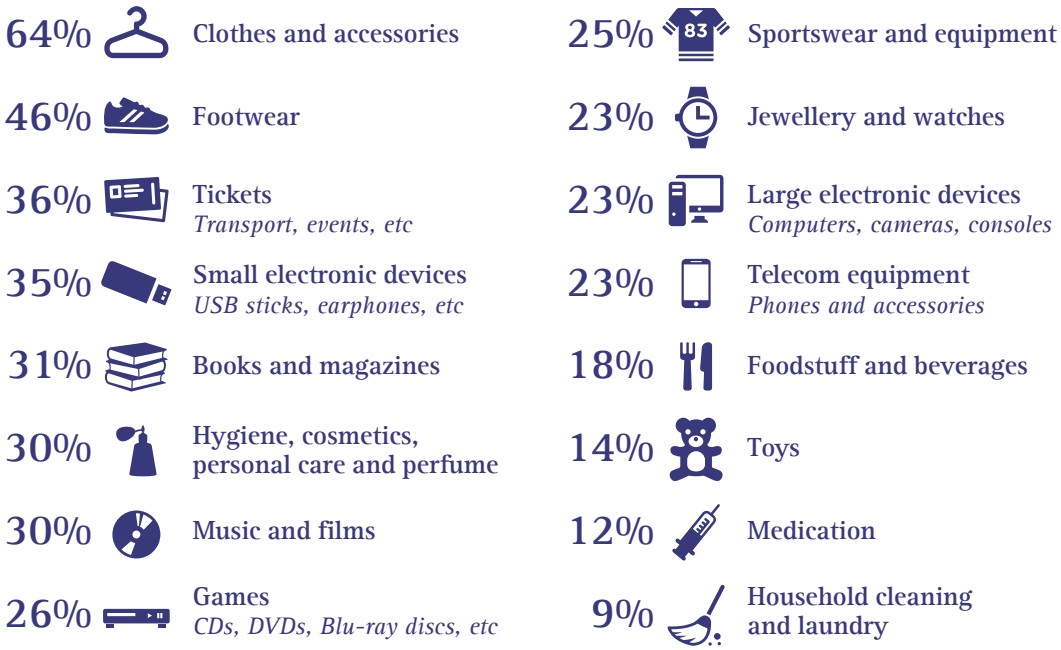
YOUNG EUROPEANS PRIMARILY BUY CLOTHES AND ACCESSORIES ONLINE. THEY VALUE A SAFE PAYMENT METHOD AS THE MOST IMPORTANT ASPECT THEY CONSIDER WHEN PURCHASING PHYSICAL GOODS ONLINE.

Young people in the EU purchase all kinds of physical goods online. Overall, 93% say they have purchased a product online in the last 12 months. In Figure 18, the proportion of young people who purchased physical goods online within the last year is presented, categorised by type of good.

- 64% bought clothes or accessories online, the most popular category,
- Almost half had bought footwear online during the previous twelve months.

Other categories of goods were tickets (including transport and concert tickets, etc.) and small electronic devices (such as USB memory sticks or earphones), purchased by a third (35%) of young people.

Figure 18 Purchase of physical goods online[34]



34 Source: Question II1: Which of the following products have you bought online during the past 12 months? (N=24,295)

Clothes and accessories, footwear and tickets are more often purchased online by females, adults, higher educated young people and those with an income compared with respectively males, teenagers, lower educated young people and those with no income.
Similar patterns apply to the online purchase of small electronic devices in relation to age, education, and income. However, the gender divide is different, since it is male rather than female who purchase these types of physical goods online.

Table 8 Proportion of young people who purchase physical goods online - profile[35]

Variable	Clothes and accessories	Footwear	Tickets	Small electronic devices
Gender				
Male	55%	41%	31%	41%
Female	73%	50%	42%	30%
Age groups				
Teenagers (15-17 year olds)	60%	39%	28%	30%
Young adults (18-21 year olds)	65%	47%	37%	36%
Adults (22-24 year olds)	66%	49%	42%	38%
Education level (undertaking)				
Low (up to lower secondary education)	60%	41%	26%	33%
Medium (up to higher secondary education / vocational training)	64%	44%	33%	33%
High (tertiary education)	67%	48%	50%	40%
Education level (completed)				
Low (up to lower secondary education)	61%	48%	22%	32%
Medium (up to higher secondary education / vocational training)	65%	47%	33%	36%
High (tertiary education)	71%	58%	50%	43%
Employment status				
Student	64%	47%	37%	35%
Employed	60%	43%	25%	41%
Unemployed	69%	55%	41%	30%
Income as student				
Income	69%	50%	41%	39%
No income	59%	39%	32%	31%

4.3.2 Drivers for purchasing physical goods online

TRUST AND SAFETY, QUALITY AND PRICE ARE THE MOST IMPORTANT ASPECT YOUNG EUROPEANS CONSIDER WHEN PURCHASING PHYSICAL GOODS ONLINE.

35 Source: Question V1.1 – V1.10: Did the following already happen to you when you used, played, downloaded or streamed content online such as: [insert answer categories indicated < 5 in II3]? (N=24,083)

Only 7% of young people in Europe have not purchased physical goods online in the last 12 months. Therefore, it is an almost universal phenomenon amongst the 15-24 year-old age group. In order to shed light on the things that are important to young people when making purchases of physical goods online, thirteen different aspects were examined as possible drivers of purchasing physical goods online.

Trust and safety

- A safe payment method is indicated by almost two thirds of young people (65%), which makes it the most commonly chosen aspect.
- Being able to trust the vendor is chosen by 44% of young Europeans.
- The site being safe, meaning there is no or only a low risk of malware and viruses, is chosen by two out of five (42%) young people overall.

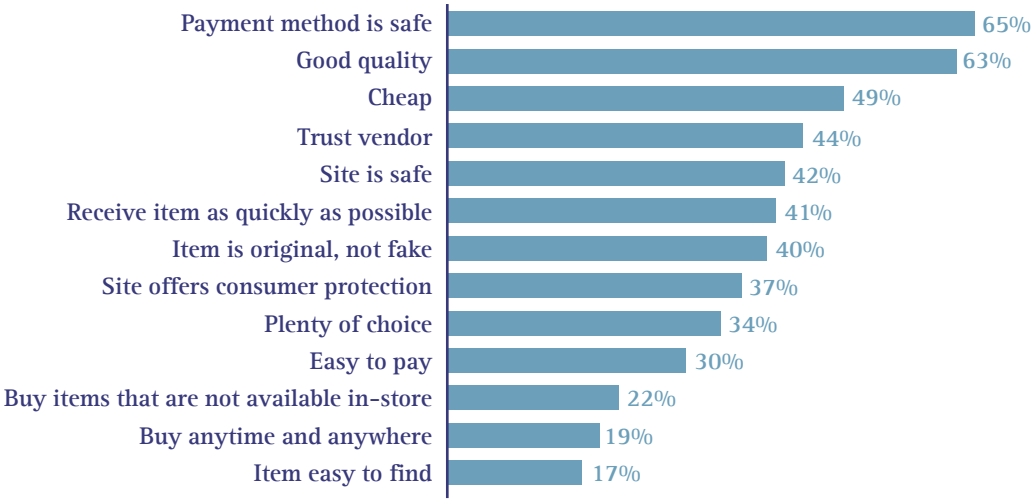
Quality

- The quality of the products is a close second in terms of what young people take into consideration when purchasing goods online. 63% of the respondents consider the quality of the good as important, with no major differences between the different socio-demographic groups, although the youngest group mentions this aspect more than the older age groups (respectively 68% vs 62% vs 60%).

Price

- The third aspect that is deemed important amongst young people, as indicated by just less than half (49%), is the price of the product.

Figure 19 Important aspects when purchasing physical goods online[36]



36 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=21,981)

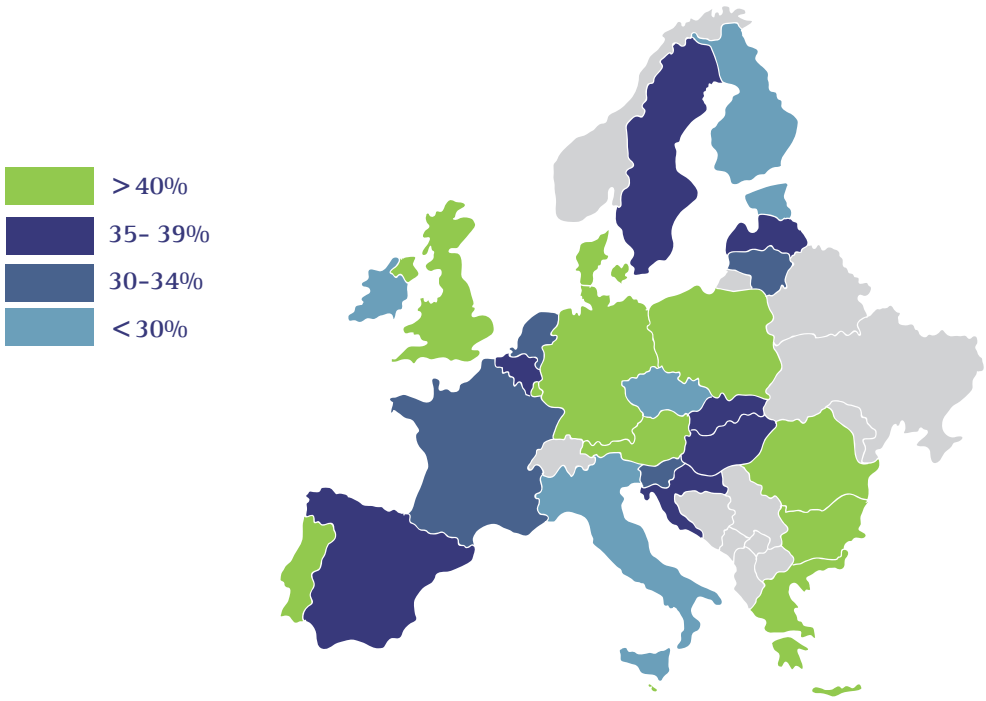
Other aspects were indicated less often, but also seem to matter to young Europeans:

- Getting the item as quickly as possible is in sixth place, indicated by 41% of respondents.
- A third of young people (34%) want plenty of choice when they shop for goods online.

There are wide variations in relation to gender and age. Females more often (than males) say that the safety of the payment method (69%) and consumer protection that the website offers (40%) are two important aspects to take into consideration when purchasing physical goods online. Teenagers more often (than young adults and adults) value a safe payment method (67%), the site being safe (45%), a good returns policy (39%) and the product being of good quality (68%) as four important aspects to consider. Among others there are variations relating to income. For instance, students with an income more often (than students without an income) say a safe payment method (68%) is important.

What is interesting to consider is that 40% of young Europeans think it is important that the item they purchase is original, not fake. The differences across the countries of the EU are illustrated in the Figure 20 below.

Figure 20 Proportion of young people who think that the item they purchase being original, not fake, is important[37]



37 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=21,981)

Quantitative results compared to qualitative findings

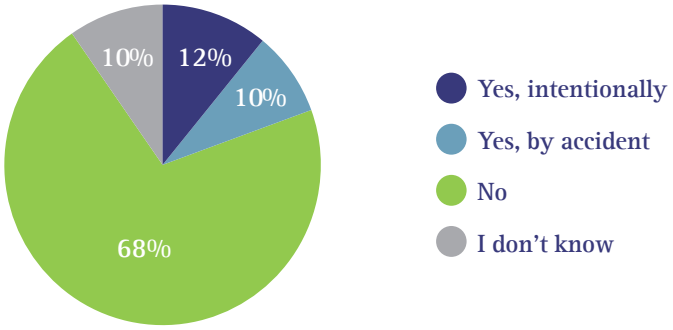
4.3.3 Purchasing counterfeit goods

THE LARGE MAJORITY OF YOUNG EUROPEANS DID NOT BUY A COUNTERFEIT PRODUCT IN THE PREVIOUS YEAR. 10% BOUGHT BY ACCIDENT AND ANOTHER 10% DID NOT KNOW WHETHER THEY HAD BOUGHT A COUNTERFEIT GOOD. 12% BOUGHT COUNTERFEIT GOODS INTENTIONALLY.

The above describes the aspects that are important to young people which they, in turn, take into consideration when purchasing goods online. This sets the context whereby almost all young people purchase goods and that price and safety are two important aspects for young people when making decisions about these purchases.

The legal status of the physical goods is an important aspect, with 40% of young people saying the fact that goods are original and genuine is something that is important to them. This study further examined whether young people purchase counterfeit goods and if so, whether they do so intentionally (see Figure 21).

Figure 21 Purchase of counterfeit goods[38]



38 Source: Question III2: During the past 12 months, have you bought a fake product online? (N=21,981)

As was the case for accessing digital content, the behaviours of young people were grouped into three primary groups:

- those who intentionally purchase counterfeit goods
- those who do not intentionally purchase counterfeit goods, and
- those who do not know whether the goods they purchase are counterfeit or not.

12% deliberately purchase counterfeit goods, while 68% do not and a further 10% do not intentionally purchase counterfeit goods but did so by accident; the remaining 10% "Don't know". Once again, the analysis considers those who do not purchase counterfeit goods and those who do not intentionally purchase counterfeit goods (but did so by accident) together as their intentions are understood to be the same. The remainder of this section discusses the intentions and experiences of these different groups as well as shedding light on what types of reasons would change young people's minds and stop them from making such purchases.

4.3.4 Young people who intentionally purchase counterfeit goods online

MORE THAN ONE IN TEN (12%) RESPONDENTS INTENTIONALLY BOUGHT COUNTERFEIT GOODS ONLINE IN THE PAST YEAR. CLOTHES AND ACCESSORIES ARE THE MOST POPULAR COUNTERFEIT PRODUCTS BOUGHT ONLINE. THE MAIN DRIVERS ARE PRICE, INDIFFERENCE AND BELIEF THAT THE COUNTERFEIT PRODUCT IS A GOOD DEAL. AVAILABILITY OF AFFORDABLE ORIGINALS, BAD EXPERIENCE AND RISK OF PUNISHMENT WOULD MAKE MOST OF THE RESPONDENTS STOP BUYING COUNTERFEIT GOODS ONLINE.

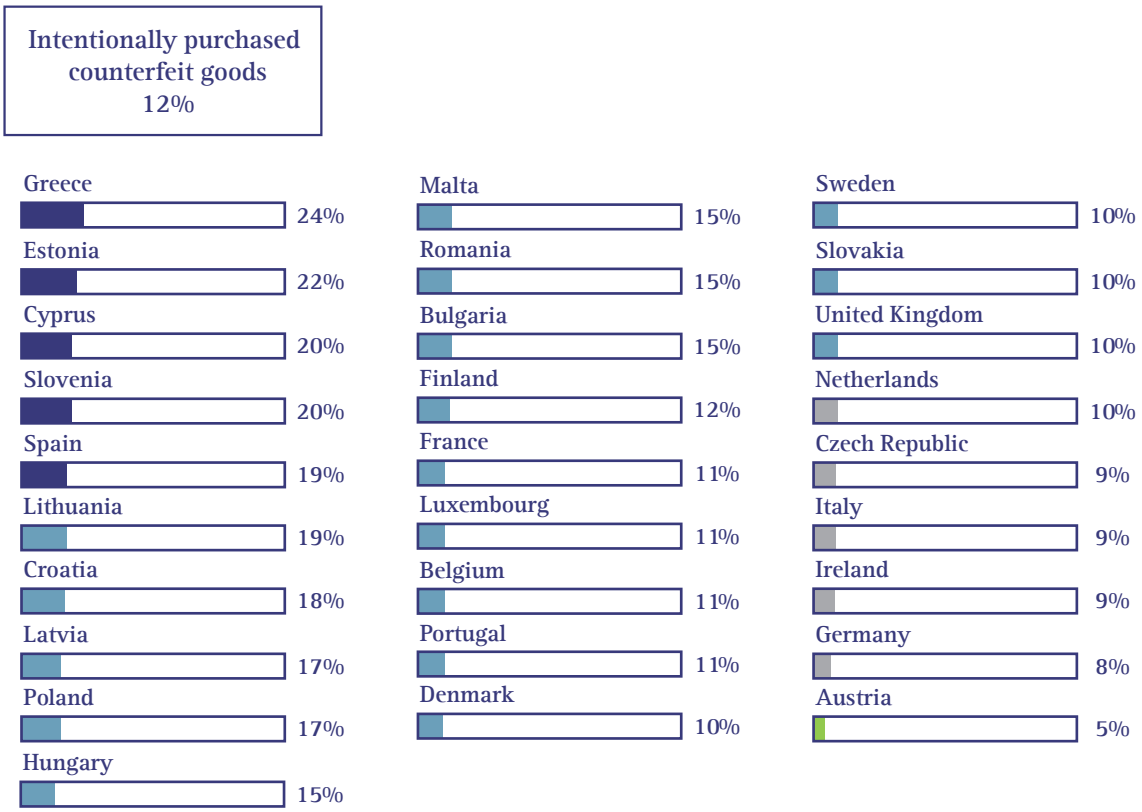
12% of young people intentionally bought counterfeit items online in the last 12 months. There are some socio-demographic characteristics that are associated with this behaviour. The profile of those who intentionally purchase counterfeit goods is outlined in the following table. Young males rather than females, lower educated young people compared to higher educated young people, and students rather than non-students are all more likely to deliberately purchase counterfeit goods. Age groups do not statistically differ from each other.

Table 9 Proportion of young people who intentionally purchased counterfeit goods – profile[39]

Variable	Proportion
Gender	
Male	13%
Female	10%
Education level (undertaking)	
Low (up to lower secondary education)	13%
Medium (up to higher secondary education / vocational training)	13%
High (tertiary education)	11%

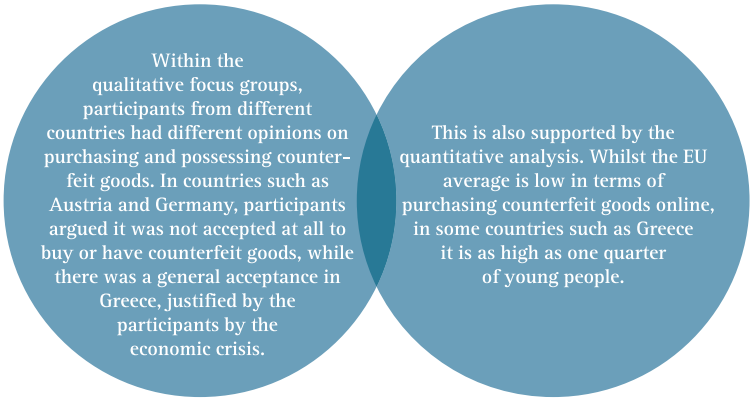
Whilst the EU average indicates that a small minority of young people purchase counterfeit goods, this is not a universal phenomenon across the EU. There are national differences, with the proportion of young people intentionally purchasing counterfeit goods ranging from 5% in Austria to 24% in Greece (see Figure 22).

Figure 22 Proportion of young people who intentionally purchased counterfeit goods per country[40]



39 Source: Question III2: During the past 12 months, have you bought a fake product online? (N=21,981)
40 Source: Question III2: During the past 12 months, have you bought a fake product online? (N=21,981)

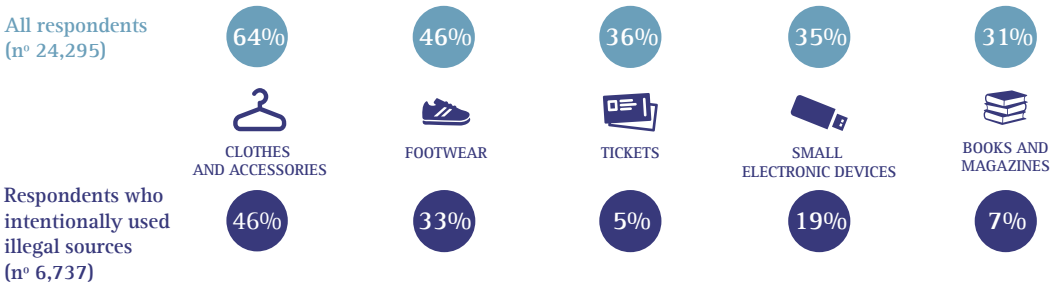
Quantitative results compared to qualitative findings



Types of counterfeit goods bought mostly online

Whilst it is relatively uncommon for young people to purchase counterfeit goods online, there are preferences in terms of the types of goods that are purchased. The figure below presents the top five goods purchased online and the respective shares of young people intentionally buying counterfeit products in these categories (see Figure 23). Clothes and accessories and footwear are again the two most popular categories, and this is reflected in the fact that they are also the two biggest categories of counterfeit goods purchased online.

Figure 23 Purchase of physical goods in general and intentional purchase of counterfeit goods[41]

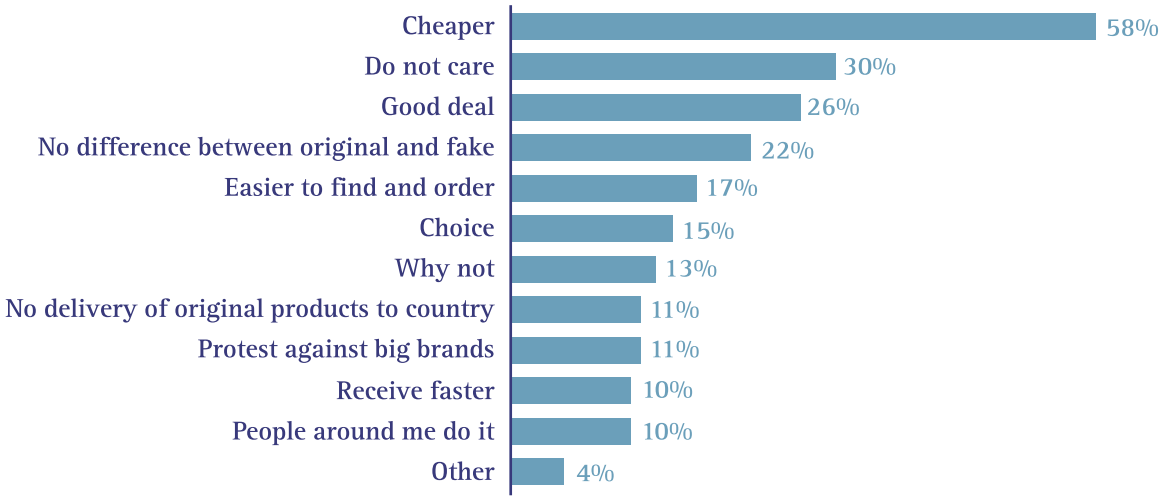


Reasons to buy counterfeit goods online

There are a number of triggers that are behind the decision to intentionally purchase counterfeit goods. In terms of the motivations of those who intentionally purchase counterfeit goods the main reason generally given is price (see Figure 24) although this is followed by young Europeans' indifference and a belief they are getting a good deal.

41 Source: Question II1: Which of the following products have you bought online during the past 12 months? (N=24,295) and III3. Which type of fake product(s) did you buy online? Please indicate all that apply. (N=2,836)

Figure 24 Drivers of intentional purchase of counterfeit products[42]



Price

The most important driver for buying counterfeit goods is price. Almost two thirds (58%) respondents intentionally buy counterfeit goods because they are cheaper than the genuine article. It is particularly young females (69%) rather than young males (50%), and students (60%) rather than those who are employed (50%) or unemployed (54%), who are more likely to say that price is an important trigger for buying counterfeit goods. Although the base sample size is limited, price is the most important trigger in every country.

Indifference

30% of young people simply do not care whether they buy genuine or counterfeit goods. This indifference is more often expressed by female (36%) rather than male young people (26%). A related response is the 'why not' attitude, which was indicated by 13% of young people.

Other reasons

One in ten respondents were triggered to seek out counterfeit goods when the originals could not be delivered to their country, a response related to online purchasing issues discussed earlier. Finally, 1 in 10 young people argued they were triggered to intentionally buy counterfeit goods to protest against big brands.

Reasons to stop buying counterfeit goods online

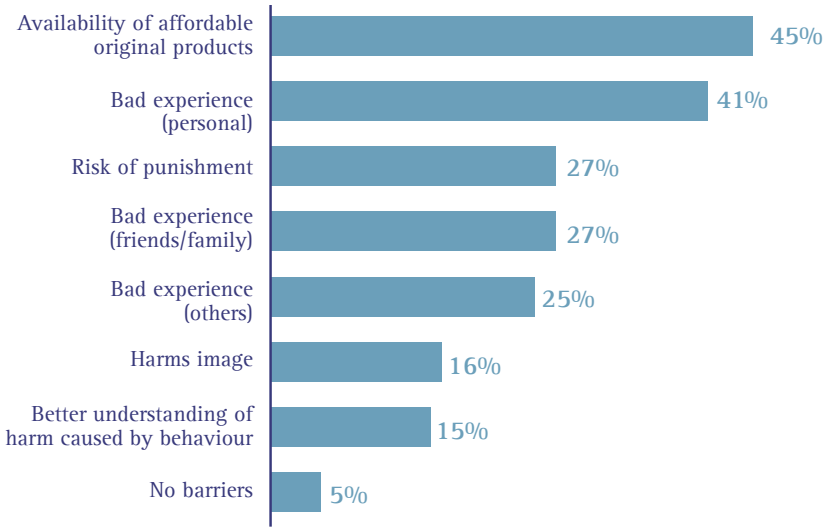
Furthermore, young people who intentionally bought a counterfeit good in the last 12 months were asked what would make them stop. Only 1 in 20 of young people argue

42 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=2,836)

that there is nothing that would stop them intentionally purchasing counterfeit goods. Amongst the reasons to that there is nothing that would stop them intentionally purchasing counterfeit goods, the following three reasons are the most commonly given (see figure 25):

- Almost half of young people (45%) would stop buying counterfeit goods if affordable original products were available. Again, price seems a clear motivator in the decision to buy counterfeit goods. In particular, young women who intentionally bought counterfeit goods would buy genuine goods if affordable.
- Having a bad experience, either personal (41%), of one of their friends and relatives (27%) or of others (25%) is another potential reason to stop. For young women, a negative personal experience would have more impact than for men.
- A third important factor is risk of punishment that is indicated by 27% of young people as a reason to stop buying counterfeit goods.

Figure 25 Reasons to stop purchasing counterfeit goods[43]



4.3.5 Young Europeans who do not intentionally buy counterfeit goods

68% OF YOUNG PEOPLE DO NOT INTENTIONALLY BUY COUNTERFEIT GOODS – THOUGH THERE ARE SOME SIGNIFICANT DIFFERENCES BETWEEN COUNTRIES. YOUNG PEOPLE PREFER THE QUALITY OF GENUINE PRODUCTS, DO NOT TRUST THE ONLINE SOURCES THAT SELL COUNTERFEIT GOODS AND DO NOT WANT TO DO SOMETHING ILLEGAL.

43 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=2,836)

The above describes the motivations of young people who intentionally buy counterfeit goods. However, the vast majority of young people do not intentionally buy counterfeit goods (78%). This section considers the profile of young people who make this choice. Furthermore, amongst those who did not intend to buy counterfeit goods, but did so accidentally, the analysis highlights why young people do not wish to purchase such goods online.

Almost 7 in 10 (68%) of respondents do not intentionally purchase counterfeit goods. The profile of young people in this category is shown in the following table. Gender, employment status, and income are important factors, with female, unemployed young people, and students without an income being more likely to say they have not intentionally purchased counterfeit goods. There are no significant differences based on, for instance, age or education.

Those who did not intend to purchase counterfeit good, but did so accidentally have a slightly different profile in comparison to those who simply did not buy counterfeit goods online. Male young people more often than female accidentally bought counterfeit goods. Similarly, young people in employment and those with a lower level of education as well as students with an income are also more likely to have unintentionally purchased counterfeit goods.

Table 10 Proportion of young people who do not purchase counterfeit goods - profile[44]

Variable	Proportion who do not buy counterfeit goods	Proportion who unintentionally bought counterfeit goods
Gender		
Male	66%	12%
Female	70%	8%
Employment status		
Student	68%	10%
Employed	65%	13%
Unemployed	71%	9%
Income as student		
Income	65%	12%
No income	72%	8%

44 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=2,836) (compared to the EU average of 68%); however, this drops as low as 38% in Cyprus.

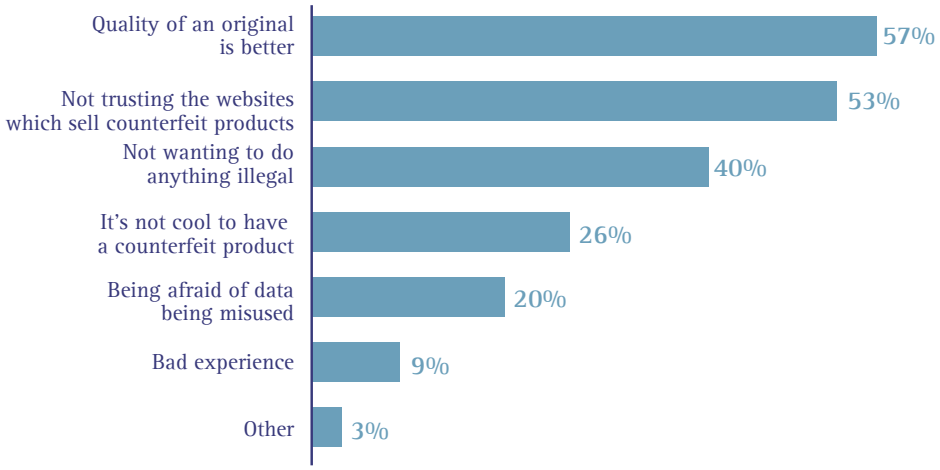
Whilst the overall EU picture highlights that it is most often the case that young people do not buy counterfeit goods, there is considerable variation in this percentage between countries. For example, 80% in Luxembourg do not buy counterfeit goods (where a fifth of respondents do in fact intentionally buy counterfeit goods).

The proportion of those who unintentionally purchased counterfeit goods ranges from 5% in Finland to 17% in Romania and 18% in Bulgaria and Cyprus. Young people who unwittingly purchased counterfeit goods were further asked what were the reasons behind their intention to avoid such products. The answers shed light on why young people do not choose counterfeit products over genuine goods – at least intentionally.

The analysis highlights that:

- Young people prefer the quality of genuine goods and this is the primary reason that those who accidentally bought counterfeit goods online gave for wanting to avoid these types of goods.
- Another important concern amongst young people is that they do not feel that websites offering counterfeit goods can be trusted. These reasons to avoid purchasing counterfeit goods were cited by more than half of young people (who accidentally purchased counterfeit goods).
- Whilst over half cited those two reasons, another important consideration is that young people do not wish to do anything illegal (40%).

Figure 26 Reasons to refrain from purchasing counterfeit goods[45]



45 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=16,553)

4.3.6 Young people who do not know if they are purchasing counterfeit goods

IN CONTRAST TO THE UNCERTAINTY THAT YOUNG PEOPLE HAVE OVER WHETHER THEIR DIGITAL CONTENT IS BEING ACCESSED THROUGH LEGAL AND ILLEGAL SOURCES, IT IS RELATIVELY UNCOMMON FOR YOUNG PEOPLE TO BE UNSURE IF THEY HAVE PURCHASED COUNTERFEIT GOODS OR NOT.

1 in 10 young people say they did not know if they purchased counterfeit goods or not. The profile of these respondents is shown in the following table. Female more often than male were unaware if they had bought counterfeit goods.

Table 11 Proportion of young people who do not know if the goods they purchased are counterfeit - profile[46]

Variable	Proportion
Gender	
Male	8%
Female	12%
Education level (undertaking)	
Low (up to lower secondary education)	11%
Medium (up to higher secondary education / vocational training)	10%
High (tertiary education)	9%

At a country level, the proportions of respondents who do not know whether they purchased counterfeit goods ranges from a negligible 3% in Luxembourg, 6% in Ireland and 7% in Italy, France and the United Kingdom to almost a quarter of the young people in Cyprus.

Looking at why young people have a difficult time distinguishing whether they bought a counterfeit good or a genuine one, two thirds (62%) say it is because they can't tell the difference between the two. Only one third (35%) simply do not care if they have purchased a genuine or fake product.

4.3.7 Experience when purchasing physical goods online

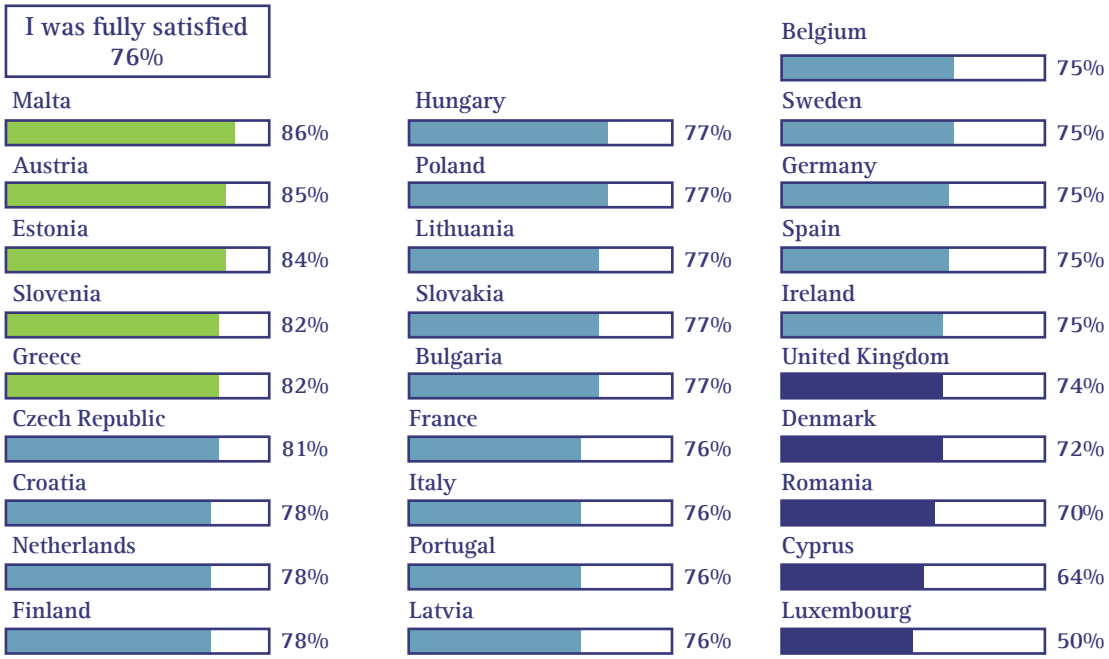
THE MAJORITY OF YOUNG PEOPLE ARE SATISFIED WITH THEIR EXPERIENCES OF PURCHASING GOODS ONLINE. NEVERTHELESS, THERE ARE A NUMBER OF NEGATIVE ISSUES THAT YOUNG PEOPLE ENCOUNTER SUCH AS GOODS ARRIVING LATE, EXPECTING THE QUALITY TO BE BETTER OR RECEIVING GOODS THEY HAD NOT ORDERED.

46 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=2,836) (compared to the EU average of 68%); however, this drops as low as 38% in Cyprus.

The above outlines that whilst almost all young people purchase goods online, the purchase of counterfeit goods is preferred amongst a minority of young people. Regardless of whether young people are purchasing genuine or counterfeit goods, the majority (77%) are satisfied with their experiences of purchasing goods online (as highlighted in the following figure). It is more likely to be young females, teenagers, students and higher educated young people to fall into this category, compared respectively with male, (young) adults, non-students, and lower educated young people.

Those who were satisfied with at least one online purchase of physical goods form a large majority of more than 80% in Estonia, Austria and Malta. On the other hand, only half of young people in Luxembourg experienced a similarly satisfactory purchase.

Figure 27: Satisfaction when purchasing goods online, by country[47]



Nevertheless, despite this overall satisfaction, there are a number of negative issues that young people encounter when purchasing goods online. There are several reasons why respondents were not fully satisfied when ordering a product online:

- Half of the young people (51%) ordered a product which arrived much later than indicated.
- Almost half of the young people (49%) expected a better quality of the product.
- A quarter of the young people (25%) received a product they had not ordered.
- A quarter of the young people (25%) were not able to return the product.

47 Source: Question V2.1-2.11: Did the following ever happen to you when you bought a product online such as [insert answer categories indicated in II1]? (N=21,981)

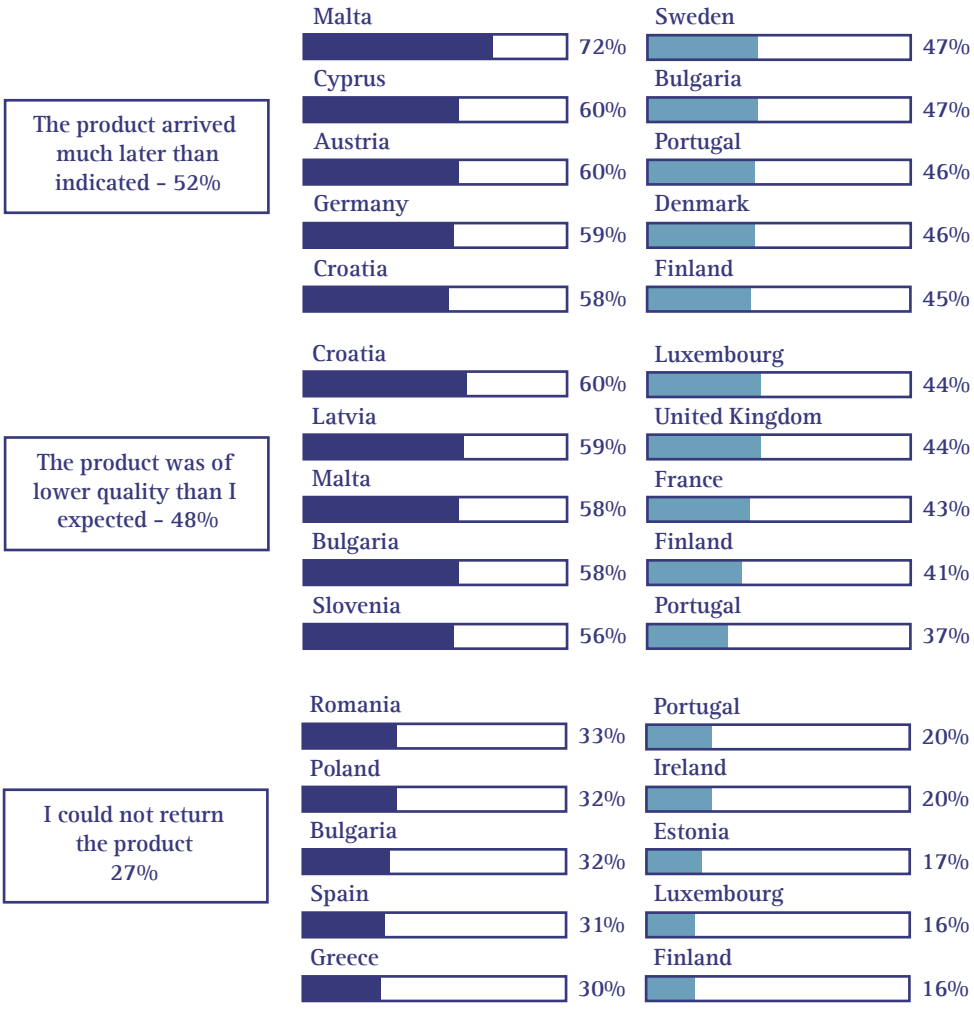
• A quarter of the young people (25%) ordered a product that did not arrive.

• And yet another quarter of the young people (23%) had their product stopped by customs or received the product broken and could not get it fixed under warranty (23%).

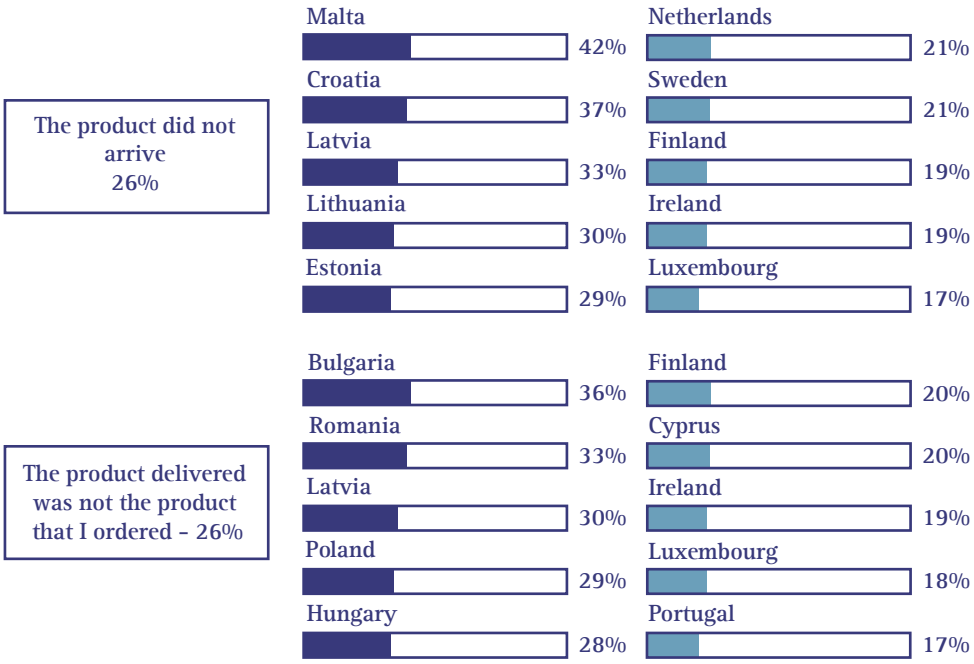
• Last but not least, 1 in 5 young Europeans (18%) received a fake product, did not get a refund for the returned good (17%) or were not able to make a complaint to the seller (21%).

The proportions of respondents experiencing problems differ between the countries. Countries with the five highest and lowest proportions are displayed below for the five most frequent problems overall.

Figure 28 Top 5 problems when purchasing physical goods online[48]

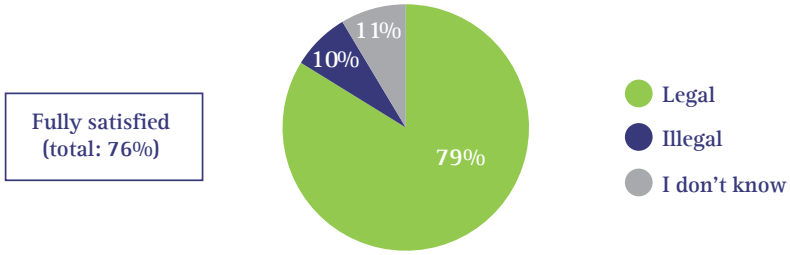


48 Source: Question V2.1-2.11: Did the following ever happen to you when you bought a product online such as [insert answer categories indicated in II1]? (N=21,981)



These experiences, both positive and negative, are further considered below, categorised by the source used to purchase the physical goods online. This source may have been legal or illegal, or in some cases respondents said they did not know if the source was legal or illegal when experiencing this kind of problem. Three quarters (76%) of young people are fully satisfied with their experiences when purchasing physical goods. Of these, 60% made their purchases from legal sources, with only 9% having bought from illegal sources and a further 7% unsure of whether the source was legal or not.

Figure 29 Satisfaction with purchasing physical goods online – legal or illegal sources[49]

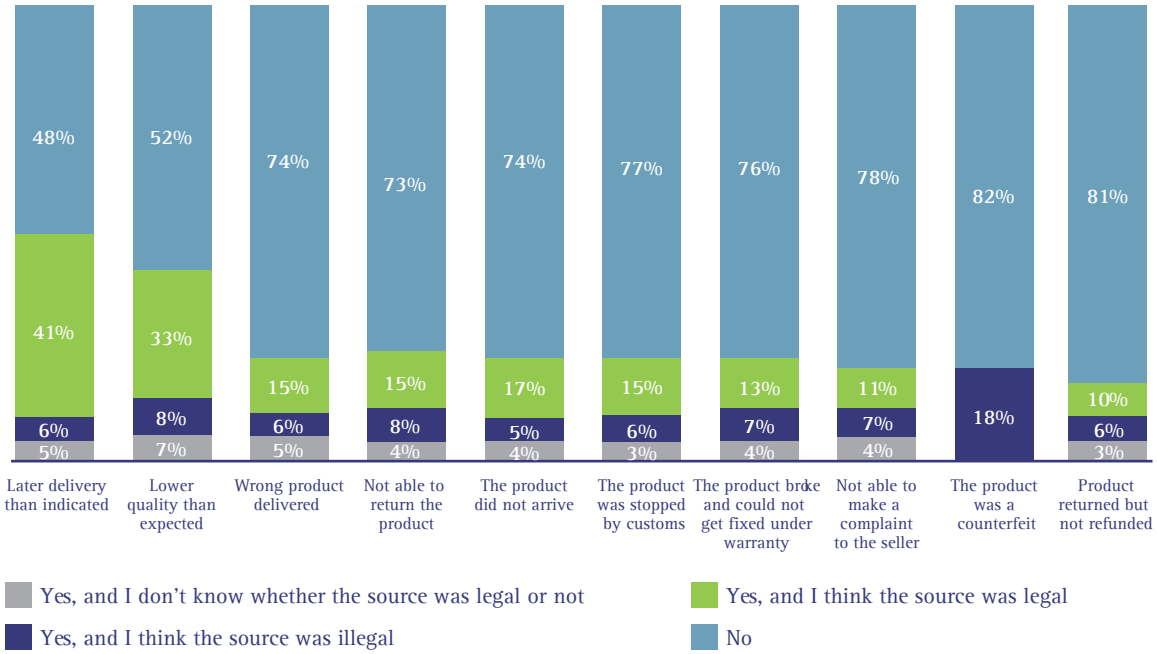


In terms of negative experiences with purchasing goods online, again given that most products bought online are bought through legal sources, young people are most likely to report that they have both positive and negative experiences through these channels. That is, when an experience occurs (either positive or negative), it is most likely to be through a legal source given that the majority of purchases are made through these channels.

49 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=21,981)

The exception is the issue that the product they bought is counterfeit. This issue is only encountered amongst those who used illegal sources. The other negative experiences more commonly reported when using illegal sources relate to inconveniencies such as not being able to return the product, not being refunded when they have returned the product, being unable to complain and no possibility to repair the product under warranty when broken.

Figure 30 Negative experiences when purchasing physical goods online – legal or illegal sources[50]



4.4 Distinguishing legal and illegal sources for both digital content and physical goods

ALTHOUGH SEARCHING FOR REVIEWS, COMMENTS AND OPINIONS ONLINE IS THE MOST POPULAR METHOD TO CHECK WHETHER A SOURCE IS LEGAL OR NOT, MOST RESPONDENTS ASSUME A SOURCE IS LEGAL IF CONTACT DETAILS ARE AVAILABLE. A THIRD OF RESPONDENTS SAY THEY ARE ABLE TO DISTINGUISH SITES SELLING COUNTERFEIT GOODS FROM THOSE SELLING GENUINE GOODS AND HALF OF RESPONDENTS INDICATED BEING ABLE TO DISTINGUISH LEGAL FROM ILLEGAL SOURCES FOR ONLINE CONTENT.

50 Source: Question V2.1-2.11: Did the following ever happen to you when you bought a product online such as [insert answer categories indicated in I1]? (N=21,981)

There are various checks that young people can make to investigate whether sources are legal or illegal before making the decision to use them to either access digital content or purchase goods. The survey captured the extent to which these checks are utilised by young people across the EU. These tools to identify the legality of a source are shown in Figure 30.

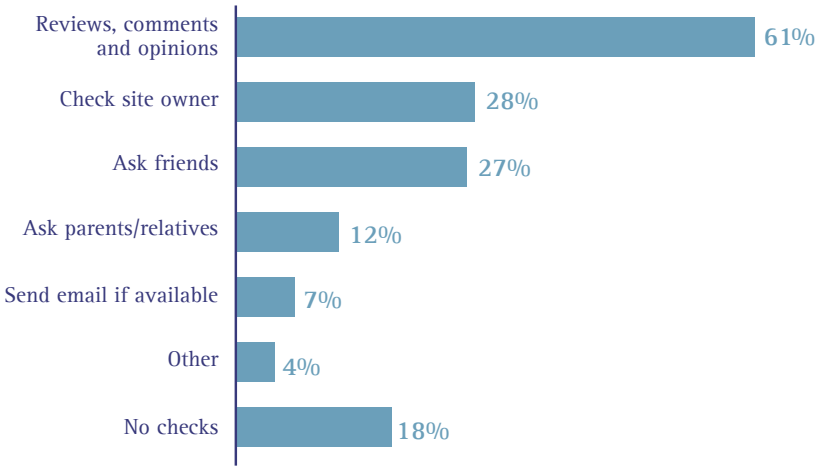
- The most common check, made by 3 in 5 young people, is to search the internet for reviews, comments and opinions about the source.
- In addition, almost a third (28%) of young people seek to verify the owner of the site and ask friends whether the source is legal. Parents and relatives are consulted by 12% of young people to verify the legality of a source.

When considering subgroups, there are some notable differences. Females more often than males inform themselves via reviews or consult parents or other relatives. Males more often than females look for who owns the source. Teenagers and students more often read reviews and comments, or consult parents or other relatives than (young) adults and non-students. Lower educated young people more often consult their parents or relatives than higher educated ones.

Overall, almost a fifth (18%) of young people make no effort to find out if a source is legal or illegal. Among this group there are some differences when considering gender, age and education. Females, adults and higher educated young people are somewhat less inclined to check than males, teenagers and lower educated respondents respectively.

There is considerable variation between countries for the proportion of young people who do not check the legality of their sources. Almost 3 in 10 young people in Estonia (29%), Slovakia (29%) and Belgium (28%) do no checking, while in Germany (12%), Italy (12%) and Austria (13%), this proportion is a little over 1 in 10.

Figure 31 Tools that young people use to check the legality of sources for digital content or purchasing goods[51]

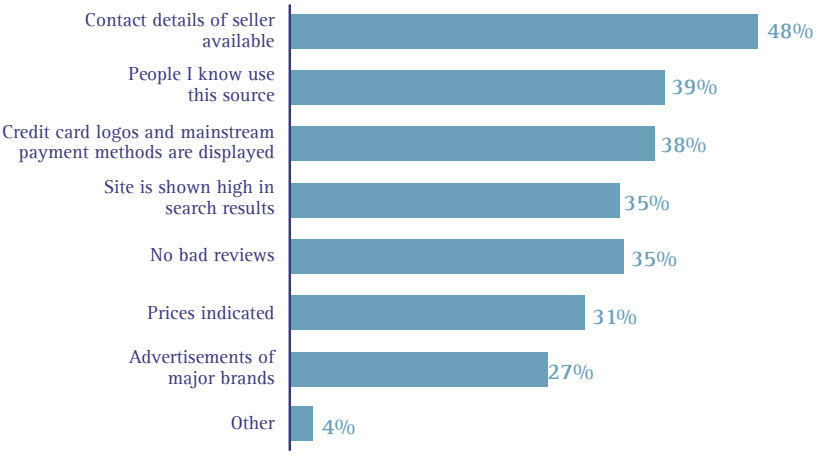


51 Source: Question IV9: How do you check if a source (website) that offers products or digital content online is legal or illegal? Please tick all that apply. (N=24,213)

Whether young people make checks or not, young people form a broad perception of whether a source is legal. There are a number of indicators which young people say they use when judging whether sites are legal, which are presented in Figure 32.

- The most important indicator to consider a source legal, mentioned by almost half of all respondents (48%), is whether contact details are available.
- 39% of young people emphasise the fact that if people they know use the site, it is a clear reason to consider the source legal.
- A similar proportion argues that when credit card logos or mainstream payment methods are displayed on payment pages, the site is legal.
- The validity of search engine results also influence young people with just over a third (35%) of young people believing that when the site is one of the first results to appear in a search, or when negative reviews and comments are hard to find, the source is likely to be legal. Moreover, 31% of young people believe that when prices are displayed on the site it is also a good indication that the site is legal.
- A quarter of young people believe that major brands advertisements in the sites is an indication of its legality.

Figure 32 Reasons to consider source legal[52]



With regard to subgroups, differences emerge depending on gender, age, employment status and education. Females more often than males regard the availability of contact details, whether someone they know has already used the site, and payment methods displaying credit card logos as ways to differentiate legal from illegal sites. Teenagers more often than (young) adults believe that knowing someone who has already used the site or that credit card logos and other mainstream payment methods are displayed on the site are good ways to distinguish legal from illegal sites, while higher educated to a greater extent than lower educated young people consider credit cards and other

52 Source: Question IV10: What makes you think that a source (website) that offers products or digital content online is legal? Please tick all that apply. (N=24,213)

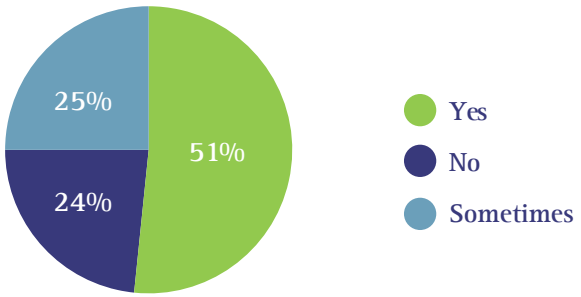
mainstream payment methods as a clear signal that a site is legal. Lower educated rather than higher educated young people are more likely to say that knowing someone who has already used the site is one way to confirm a site is legal. Finally, students (more often than non-students) are of the opinion that knowing someone who has used a site is a good way to tell the difference.

Between countries, there are some differences in the indicators used to decide whether a website is likely to be selling genuine original goods, though the availability of contact details is the most commonly mentioned factor everywhere. The proportion of young people who assume the absence of negative reviews points to the legality of the source ranges from only 23% in Slovenia to 53% in Cyprus. The proportion of young people assuming a source is legal when credit card logos and mainstream payment methods are displayed is around 20% higher in Finland (58%) than the European average (38%). The proportion believing a source is legal when it is displayed high in search results is highest in the UK (48%), while knowing someone who has used a site before is most often mentioned by young Europeans in Denmark (51%), Ireland (49%), Finland (49%) and Bulgaria (49%).

So far in this section, no distinction has been made between digital content and physical goods. It indicates the general checks and indicators that young people use to identify the legality of the sources they use, whether this is to buy physical goods or access digital content. In the remainder of this section the distinction is made between these two different types of sources.

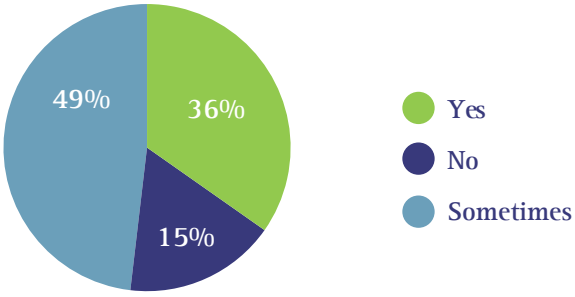
Figure 32 illustrates the number of young people who say they can tell the difference between legal and illegal sources for digital content whereas Figure 33 highlights the degree to which respondents are confident in distinguishing between sources offering counterfeit or genuine goods. The certainty that young people have in these two domains is not the same. That is, half of young people say they can tell the difference where digital content is concerned, but when it comes to physical goods, only a third of young people can tell the difference.

Figure 33 Identifying illegal sources that offer digital content[53]



53 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=24,083)

Figure 34 Identifying websites that offer counterfeit physical goods[54]



Male respondents more often than female say they can identify websites selling counterfeit goods. At the country level, the perceived ability of young people to judge the legality of a source is highest in Denmark (58%), Finland (58%) and the UK (57%), and lowest in Croatia (29%).

Table 12 Identifying illegal sources that offer digital content - profile[55]

Variable	YES	NO
Gender		
Male	58%	25%
Female	50%	24%
Employment status		
Student	52%	24%
Employed	49%	27%
Unemployed	44%	28%
Education level (undertaking)		
Low (up to lower secondary education)	42%	31%
Medium (up to higher secondary education / vocational training)	46%	25%
High (tertiary education)	55%	23%
Income as student		
Income	51%	21%
No income	47%	24%

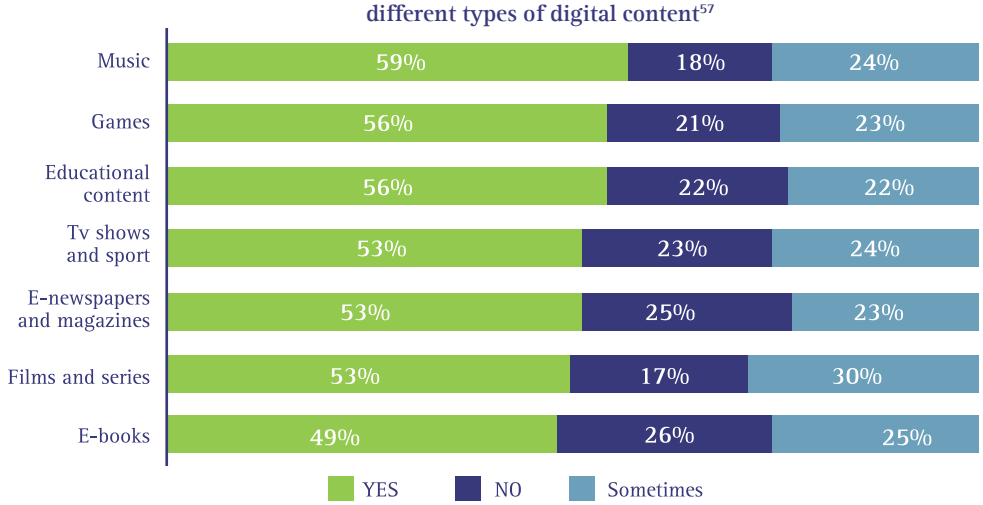
54 Source: Question III1. Can you tell the difference between a website that sells only genuine (=real) products and a website that sells fake products or a mix of genuine and fake products? (N=24,295)
55 Source: Question IV1.1 – 1.8: When you look for content online do you know whether the source (website) you use for using, playing, downloading or streaming provides you the content legally or illegally? (N=24,083)

Table 13 Identifying websites that offer counterfeit physical goods - profile[56]

Variable	YES	NO
Gender		
Male	45%	14%
Female	27%	16%
Employment status		
Student	37%	14%
Employed	39%	16%
Unemployed	33%	18%
Education level (undertaking)		
Low (up to lower secondary education)	35%	18%
Medium (up to higher secondary education / vocational training)	33%	18%
High (tertiary education)	39%	14%
Income as student		
Income	39%	14%
No income	33%	15%

The survey also looks at whether young people believe they have the ability to judge the legality of sources depending on the type of content they are trying to access. Figure 35 highlights the proportion of young people who believe they can determine the legality of a source. These proportions are of those who say that they use these types of digital content. Users of music are most confident in their ability to determine the legality of the source (59%), with certainty of legality slightly less clear for users of e-books and e-newspapers or magazines.

Figure 35 Knowing the difference between legal and illegal sites that offer different types of digital content[57]



56 Source: 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=24,295)

57 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=24,083)

4.5 Communication

ARGUMENTS RELATED TO PERSONAL SAFETY RATHER THAN MORAL VALUES ARE BETTER SUITED TO CONVINCING YOUNG PEOPLE TO THINK TWICE BEFORE USING ILLEGAL SOURCES OR BUYING COUNTERFEIT GOODS.

A quarter of young people say that they have intentionally used an illegal source for online content in the past year and slightly more than one in ten (12%) report they have bought counterfeit goods in the past year. To change this behaviour an effective communication strategy aimed at increasing young people's awareness of Intellectual Property Rights (IPR) and the negative impacts of counterfeiting and piracy could form part of the appropriate response. For a successful communication strategy, it is necessary to identify the themes, which are seen as important by young people.

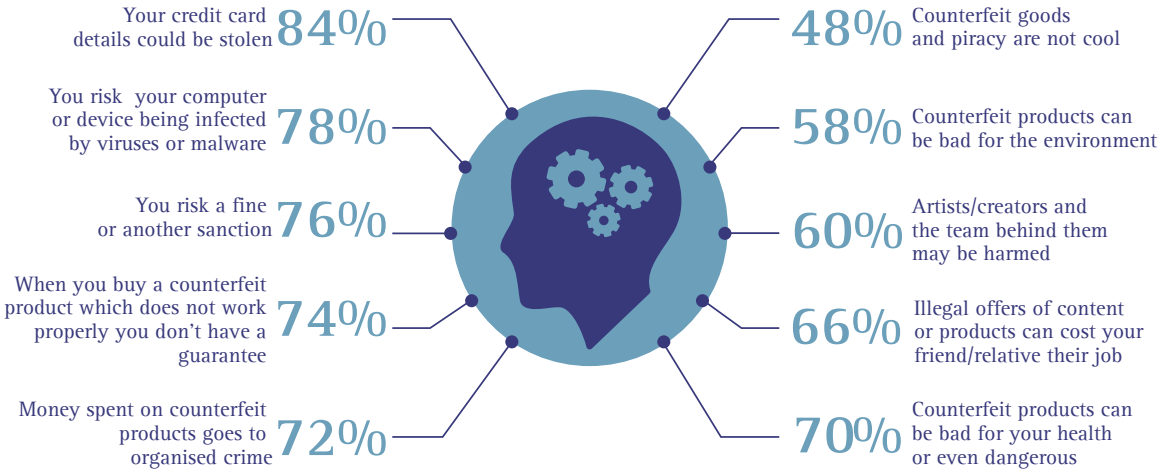
Based on the survey results two main themes seem to attract the attention of young people and therefore communication relating to these two themes has the potential of impacting on young people's beliefs, attitude and, ultimately, behaviour. The first theme relates to personal safety and risks; the second to moral values.

1. Personal safety and risks
Making people aware of the danger to which they are exposed when using illegal sources or buying counterfeit goods through infecting their computers with viruses, risking a fine or a bad quality product/service.

2. Moral values
Making people aware of the damage they cause to the community, the artists, the companies and to others when using illegal sources for online content or purchasing counterfeit goods.

These themes are represented in the following figure, with those relating to personal safety highlighted in green and those associated with moral values in red. It is clear from the figure that it is the statements that can be considered to be 'personal safety' aspects that carry more weight than those relating to 'moral values'. However, both seem to be relevant.

Figure 36 Reasons that would (probably) make you think twice[58]



The top 5 arguments which could bring young people to reconsider[59] their behaviour are:

• A large majority (84%) of young people are afraid that their credit card details might be stolen when using illegal sources or purchasing counterfeit goods. This is the top reason why respondents would stop using illegal sources. However, looking at the experiences young people encountered with online content, theft of credit card details does not seem to be very common when using an illegal source (reported by 6% of young people). This may of course be linked to the fact that illegal offers of online content are very often free of charge and no payment details need to be entered. More women (88% vs 81% men) think that they would have second thoughts about their behaviour if their credit card details were stolen. In addition, teenagers (86% vs 85% young adults vs 82% adults) and students (85% vs 79% unemployed vs 82% employed) are more likely to rethink their behaviour when they consider possible theft of their credit card details.

• More than three quarters of young people (78%) would think twice before using illegal sources when considering the risk that their computer or device becomes infected by malware or viruses. This seems to be a reasonable argument, since 19% of young people have already experienced problems with viruses or malware when accessing an illegal source. The risk of their device becoming infected would make more women (83%) reconsider their behaviour than men (73%). This would also have more impact on teenagers (80% vs 79% young adults vs 77% adults) and students (80% vs 73% unemployed vs 75% employed).

• Risking a fine or other sanction is a good reason to rethink their behaviour

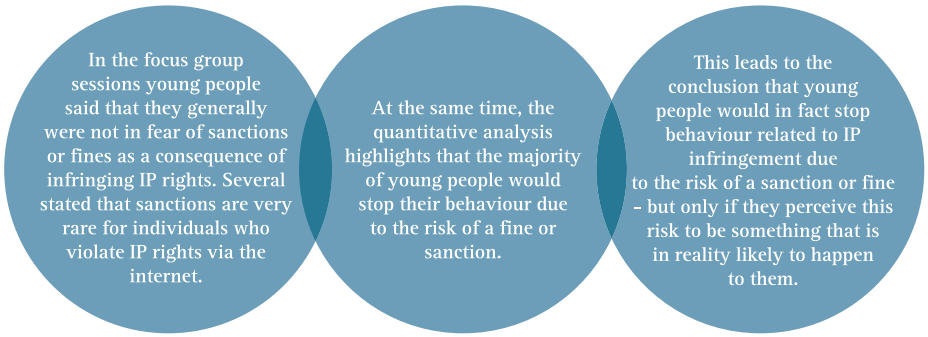
58 Source: Question IV11.1 – 11.10: What would make you think twice before using, playing, downloading or streaming content from an illegal source (website) or before buying a fake product online? (N=23,100)
59 Includes those who said 'yes' and 'yes – probably'.

for more than three quarters of young people (76%). Women (81% vs 70% men) and students (77% vs 69% unemployed vs 72% employed) are more likely to say they would rethink their behaviour when risking a fine.

• Another 74% of young people declared they would reconsider a purchase from an illegal source because counterfeit goods do not have a guarantee in the event of a malfunction. This would have the most impact on female young people (77% vs 70% male).

• Knowing that money spent on counterfeit goods goes to organised crime would make 72% of the respondents think twice about using illegal sources or buying counterfeit goods. This would have more impact on women (74%) than men (69%), with no other major differences between socio-demographic groups.

Quantitative results compared to qualitative findings



The other narrative – that pertaining to moral values - also appears to have potential to reach the target group of young people in Europe. Even though these reasons are not as prevalent amongst young people, nevertheless the majority still agree that these reasons would make them reflect on their behaviour. Only one statement seems less impactful, with less than half of young people indicating it would have an influence on them.

• Seven out of ten (70%) respondents would not buy counterfeit products if they knew that these products could be bad for their health or even dangerous. Again, women (75% vs 65% men), students (71% vs 64% unemployed vs 65% employed) and higher educated young people (73% vs 71% medium vs 67% lower) are most likely to say they would be influenced by this argument.

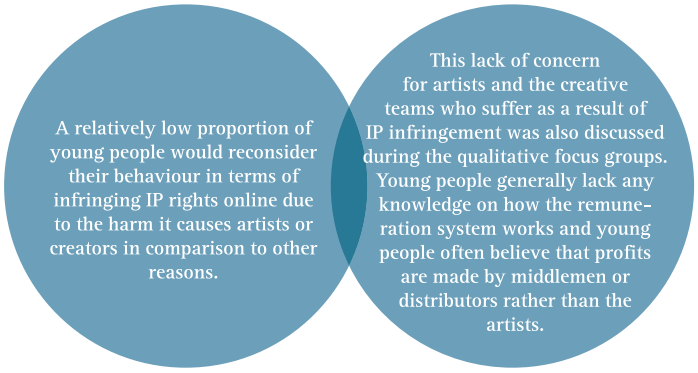
• A smaller proportion (66%) of respondents would reconsider their behaviour if it would jeopardise the job of a relative or friend. Women (71% vs 61% men), teenagers (69% vs 67% young adults vs 63% adults) and students (68% vs 58% unemployed vs 64% employed) would be especially influenced by this factor.

• The knowledge that the artist or creator and the team behind them could be harmed would make 60% of the young people reflect about using illegal sources or buying counterfeit goods. Socio-demographic differences are mostly insignificant, though women (62%) say more often than men (58%) that this would make them reconsider ordering via an illegal source.

• More than half of young people (58%) would rethink the purchase of counterfeit goods if they knew that it could be bad for the environment. Women (62%) are the only demographic group which stands out in this respect.

Less than half (48%) of young people would stop buying counterfeit goods or using illegal sources for online content simply because "it is not cool".

Quantitative results compared to qualitative findings



The above highlights what messages may be the most effective for a general EU-wide communication campaign. However, there is country variation when looking at which type of argument would convince young people to think twice before using illegal sources or purchasing counterfeit goods. Any national-level communication could take these variations into account to tailor communication to be most effective amongst young people in that country. The positioning map below illustrates all countries of the EU. Four groups can be distinguished:

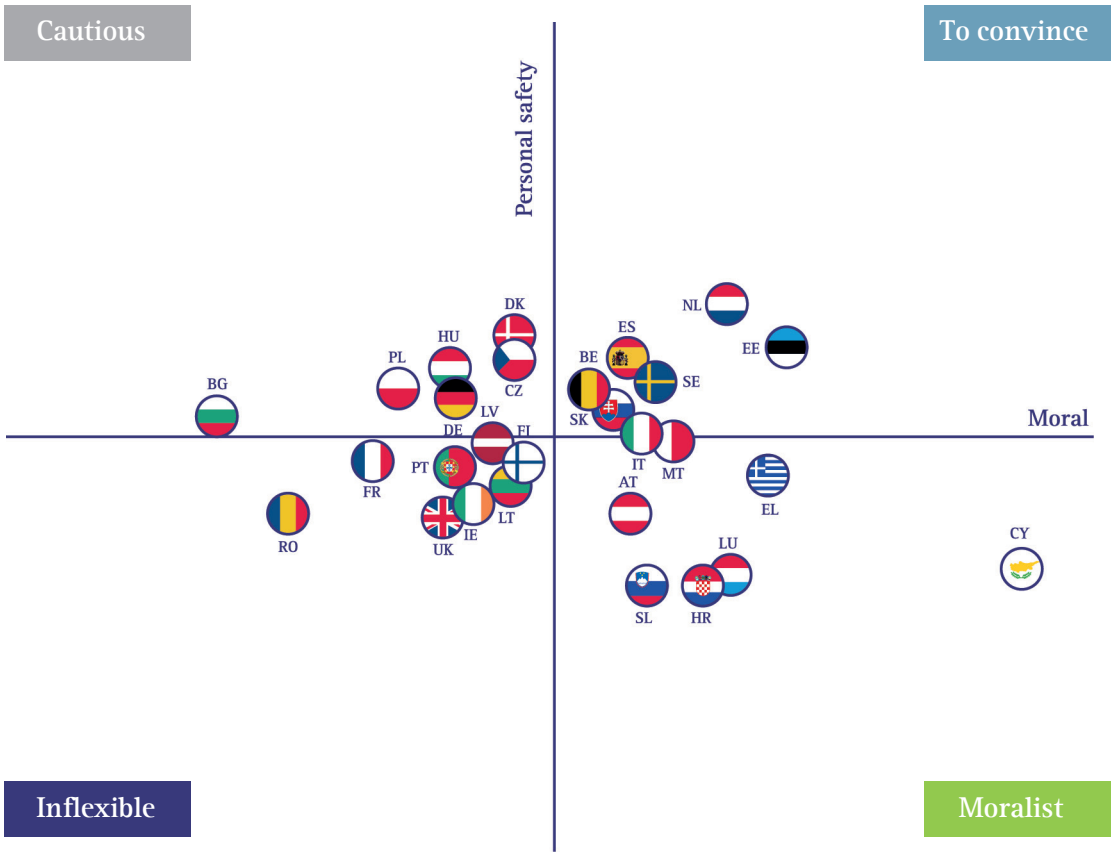
• The ones in the upper right corner score high on both moral values and personal safety and are the easiest to convince to think twice before using illegal sources or purchasing counterfeit goods. Estonia and the Netherlands are the best examples of this group.

• The ones in the lower left corner are the opposites of the first group. They score both low on moral values and personal safety, which means that both types of arguments will hardly convince them to think twice. Their behaviour is highly likely to be inflexible. The most extreme case here is Romania.

• The third group, the upper left corner, consists of countries where respondents score high on personal safety arguments, but low on moral arguments. They can be described as cautious because they care about their personal safety. Within this group, Denmark scores the highest on personal safety.

• The last group, the lower right corner, consists of countries where respondents can be called moralist, because moral reasons would more likely make them think twice than arguments related to personal safety. Respondents from Cyprus are the best examples, but also respondents from Luxembourg, Croatia and Slovenia fit this group.

Positioning map



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5. Conclusions of the research

Intellectual Property and Youth

From the conducted qualitative and quantitative research amongst young people in the 28 EU Member States, it has become clear that there are substantial behavioural differences between using illegal sources for digital content and buying counterfeit products.

Even though more than one in ten (12%) reported having intentionally bought counterfeit goods online in the past 12 months, an important majority are **not interested in buying counterfeit products** and pointed out several reasons why they do not want them and, as such, do not look for them. On the contrary, they try to avoid buying counterfeit goods and they are open to more information on how to distinguish counterfeit from genuine products. They admitted that they lack the tools to recognise counterfeits on the internet. They rely on check points to evaluate the website, but these checks are no guarantee on the products the website offers. More information to help them avoiding buying counterfeit products seems to be desirable.

Young Europeans prove to **think completely differently about digital content**. One in four (25%) admitted to having intentionally used illegal sources to access digital content in the past year.

Music is the most popular digital content that young people access, with almost all young people streaming or downloading this content (97%). However, only a little over half (56%) of young people who use illegal sources are doing so to access music content. Films/series is the second most accessed content (95%): however, it is most likely to be the digital content accessed by those who use illegal sources (85%). Games are the third most accessed content (91%): however, only 29% of those intentionally using illegal sources access games. This is due to the fact that games are not one-time experiences, but are played during a longer period. On top of that, games bought legally contain an important reward as they will contain all the software needed to play the game online with their friends.
Young people indicated they do not necessarily want to download digital content. Unless they intend to use the digital content in situations where they will not be able to connect to the internet, they prefer to stream content (56% streaming vs 27% downloading). They also reported that they do not feel that streaming music of videos is illegal behaviour. Young people also stream sport events because these events are real-time experiences. Not only is it important to watch sport live, it is also a one-time experience: it is pointless downloading the sports event as they will never watch it again. Even more so than music or films, young people seem to consider sport events as 'throw away content'.

Even though some young people are familiar with the notion of IP, they do not necessarily take this into account in their actions. For some young people, **using illegal sources for digital content is a practice that has become anchored in their daily life**.

In terms of what are the drivers motivating young people to access digital content or buy counterfeit goods from illegal sources, price is a key element behind young people's decision-making. At the same time, the availability of affordable content or a product from legal sources is the most important condition mentioned by young people when asked what would motivate them to stop using illegal sources or buying counterfeit goods.

Concerning digital content, current trends may support a **switch to using legal sources**. The young people in the study expressed clearly their approval of easy-to-use legal streaming solutions such as Spotify and Netflix. Starting with a free version with advertisements, they may switch to a paying version as they long for more user-friendliness and premium options such as no advertisements and the possibility to download music.

Whilst price is one of the biggest motivating factors influencing young people's decision to buy physical goods online or access digital content, **quality, trust and safety** are other important considerations. These factors are not only important when purchasing goods or accessing content, they also seem to influence young people to choose legal sources. Quality is the most important reason refraining young people from buying counterfeit goods which are considered to be of lower quality. Trust and safety also play an important role. Young people attach great importance to the payment methods, a trustworthy vendor and the site in general being safe. Furthermore, they want to avoid viruses and malware at all times and they are open to using legal sources if it strongly reduces the risks on viruses or malware. These are reasons to choose legal vendors and sources which they trust more. Besides the quality of the offers and safety of the sources, **the risk of punishment** has the potential to positively influence young people's decisions to choose legal offers, with almost three in ten young people indicating this as a reason to stop using illegal sources for goods and content.

An important element in further stimulating the use of legal content and genuine physical goods may be the creation of discussions on the topic to **increase awareness**. Therefore, it seems essential to keep the tone of voice positive or neutral and to distinguish different forms of digital content.
Young people pointed out three ambassadors from a number of examples that would

be best to deliver communication on IP: local artists, real consumers and schools. In the communication, young Europeans prefer to hear about real stories about artists and consumers harmed by counterfeiting and piracy. They also want concrete and factual information about the websites that are closed down. Messages need to be neutral, not moralising, enabling young people to form their own opinion.

They also expressed an interest in learning what is behind the business model of illegal sites and how the remuneration system works as it would give them more insight into the consequences of using pirated sites or buying counterfeits for artists, producers, entrepreneurs, etc.

Only a very small minority of young people using illegal sources say that nothing would make them think twice before using illegal sources or buying counterfeit goods. This implies that the majority can be influenced by effective and impactful communication coupled with other initiatives like improving the accessibility of legal offers. Arguments relating to safety and risks ('your credit card details could be stolen', 'you risk your computer or device becoming infected by viruses or malware', 'you risk a fine or another sanction') seem to have the potential to make an impact. Counter to this, arguments relating to image or social responsibility show a lower potential impact ('fakes and piracy are not cool', 'fake products can be bad for the environment', 'Artists/creators and the team behind them may get harmed'). Nevertheless, those arguments could still make some impact, particularly in some countries.

A complicating factor in any effort to encourage young people to choose legal offers is that young people indicate that they find it hard to judge the legality of a source. They have several strategies to help them judge the legality, of which checking reviews, comments and opinions about the site is the most important one. Yet they clearly ask for extra guidance on how to determine the legality of a source.

To sum up the results of both qualitative and quantitative parts of the report, a good offer in terms of price and availability coupled with a well-designed communication campaign including safety and moral arguments as well as information on what is legal and what is not and why, provided in a neutral tone and delivered by the right ambassadors, is likely to be the most effective way to change the behaviours and attitudes of young people towards IP infringement.

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6. Appendix 1: Discussion Guide

Intellectual Property and Youth

Focus groups

YOUTH IP perception and online behaviour related to IP
DISCUSSION GUIDE

Key challenge	• **Learn** about young people's perception and behaviour with regard to searching/accessing/downloading/streaming/ using content online and buying products online and **understanding** their possible motivation and choices for ordering fake/original products or accessing digital content from legal/illegal sources. • Explore their information and communication needs in relation to counterfeiting and piracy.
Key objectives of the research	**Digital content** • Create a journey map for searching, accessing, downloading, streaming and using content online (music, films/series, TV shows and sport, games, e-books, e-newspapers and magazines, educational content, etc.) in relation to legal/illegal sources. • Understand drivers and barriers with regard to searching, accessing and using legal/illegal sources of digital content. **Physical goods** • Create a journey map for searching and ordering (buying) original and fake products online. • Understand drivers and barriers with regard to buying original and fake products. **Communication** • Map young people's desired communication approach regarding counterfeiting and piracy.

Section 1: Intro (15 minutes)

Purpose:

In this section, we want to introduce the purpose of the research and create a good group atmosphere.

Explanation (5 minutes)	– Explanation to the participants concerning: • Topic: online behaviour • Duration • Privacy (recording, client room, etc.) • No right or wrong answers; every opinion is important • Mobile devices • Food and drinks
Group intro (10 minutes) Stimuli: whiteboard	– Introduction of the moderator – Introduction of the participants: • First name • Age • Hobbies • What do you order, access, use, stream, download, etc.? (physical goods and digital content)

Section 2: Journey map online digital content (20 minutes)

Purpose:

Understand what channels young people use for online entertainment/accessing, streaming, downloading, ordering and why they choose these channels.

Remarks:

Extra attention to differences between men and women and between younger and older age groups.

Type of online content (3 minutes) Stimuli: whiteboard	As you know, we will be discussing online behaviour, notably in relation to counterfeiting and piracy today (explain what are counterfeiting and piracy). First of all, when you go online... – What do you do online? What type of content do you use? MODERATOR: write down the different types of content (music, films/series, TV shows and sport, games, e-books, e-newspapers and magazines, educational content, etc.) – Today we will talk, in particular, about five specific types of online digital content: • Music • Films, series • TV shows & sport • Games • E-books, e-newspapers and magazines MODERATOR: write these topics on the white board.
Decision tree (17 minutes) Stimuli: whiteboard, paper + pens	SEARCH PROCESS – How do you search for online content? – Exercise: each participant draws his "decision tree" (=all the different steps they take and decisions they make when they consult online content) for all online content that is relevant to them. If they have different decision trees per type of content (e.g. music vs films), they must draw different trees per type of content they have searched for in the past 12 months. Afterwards the decision trees are discussed in groups. MODERATOR: ask the following questions while discussing the decision trees: • Do you deliberately go online to find this content or is it more coincidental (e.g. a friend sent you a link to a song by e-mail)? • What triggers you to go and get this information online (instead of in a brick and mortar shop for example)? • Do you know in advance exactly what content you are looking for? • How do you start looking online? What does your search process look like? • Where do you start looking? • If you start with a search engine like Google or Bing, what websites or types of websites are you looking for? Are you looking for a specific website to go to next? How important are these search engines for your search?

	CHANNELS USED – For each content type (music, films/series, e-books, TV & sport, games): • What channels do you use to get this content (e.g. YouTube, Spotify, iTunes, search engines like Google, artist´s own website, sports team´s website, etc.)? MODERATOR: write down the different channels on the whiteboard. Discuss them after. • How do you access this content (downloading streaming, buying, etc.)? Select the four most popular channels for your country and ask for these channels: • Why do you use this channel? • What are the benefits of this channel? What are the downsides? • What or who influences your choice for this channel? • How did you find out about this channel (Facebook, a friend, a blogger, a magazine, etc.)?

Section 3: Drivers online content (25 minutes)

Purpose:

Understand whether young people make/know a difference between legal and illegal sources, what is their experience and what are their motivations to choose one or another.

Remarks:

Focus is on experience with both legal and illegal sources and motivation that pushes either to one or to another (price, timing of new releases, rigid format, etc.) (Stress that there is no judgment towards illegal sources.)

Choice drivers (25 minutes) Stimuli: whiteboard	MODERATOR: show the participants the overview of the online channels you wrote on the whiteboard. **ILLEGAL VS. LEGAL sources (use "sources" instead of "sites" throughout the whole questionnaire)** MODERATOR: take the list of different channels mentioned by the participants. • Explain the use of the terms legal source/legal content and illegal sources/illegal content: "Legal sources" are considered sites that are authorised to or not legally prevented from offering content/products/services. "Illegal sources" are those that are prevented by law from offering/selling the content/products/services in question. (MODERATOR: mark the sources (websites) which are believed to be legal and illegal with a different colour). • We have discussed several sites that we use to access content. Can you tell which of these are authorised to provide content and which ones are not? Do you care whether a source is legal or not? • If you access online content, is it always clear to you if this content is offered legally or not? Why (not)? • How can you recognise an illegal source? How is it different to a legal source? Why would you go to the legal source and why would you go to the illegal one? • If not mentioned spontaneously, explicitly ask about the role of: availability (newest releases), diversity (different format, content consumption, countries, languages, payment, etc.), quality (how do you understand quality). **ILLEGAL SOURCES** **Rational experience** • Why do you go to the illegal sources? • What are the main benefits of these sources? • How satisfied are you about these sources? Why? • How would you rate the accessibility of these sources? • What are the downsides of these sources?

	• Does it matter to you that these are illegal sources? • What would make you go to the legal sites? LEGAL SOURCES Rational experience • Why do you go to the legal sites? • What are the main benefits of these sites? • How satisfied are we about these sites? Why? • How would we rate the accessibility of these sites? • What are the downsides of these sites? What could be improved? • Does it matter to you that these sources are legal or illegal? • What would make you go to the illegal sources?

Section 4: Journey map online purchase of products (physical goods) (40 minutes)

Purpose:
Understand the online shopping behaviour of the participants and, related to that, their experiences and motivations for buying fake or original products.

Online webshops (40 minutes) Stimuli: 2 laptops with internet access	We have talked about online content for some time now, let's change the subject! Let's talk about online purchase of products like handbags, clothes, watches, medication, cosmetics, footwear, sportswear, electronic devices, CDs and DVDs or whatever products you can buy online. ONLINE PURCHASING BEHAVIOUR • What kind of products do you mainly buy online? • What is important for you when you want to buy products online? (Price? Delivery speed? Trust in a shop/brand (trust that you get what you paid for)?) EXERCISE: ONLINE SHOPPING Ok, let's do something different now... MODERATOR: divide the group into 2 smaller groups (4 participants each). Each group will be instructed to buy a specific product online.

	• In each group, 2 participants will do a simulation of a purchase. They will go online and talk out about every step they take, why they take that step, why they open a specific link and not another link, their first impression of an online shop (MODERATOR: or any other kind of website that sells products), why they look further for other sites which sell products or not, every thought or remark that comes up in their mind • The other 2 participants of each group will be observers; they will take notes of the search and decision process of those who simulate the purchase. After you have explained the exercise, ask the "searchers" to leave the room so you can brief the "observers" on what topics they should focus on. After this, the "searchers" can come back in the interview room and start their search. The searchers have 10 minutes to search online. Topics the observers focus on: • Approach and steps in the search process (e.g. search engine or directly to a specific website). Easy to find your way? • Type of online shops/sites where products are being sold that are selected from the search results • Choice for online shops with legal or illegal products/familiarity with online shops that sell products illegally. • Look and credibility of the online shops that are visited. Story: 1 group of searchers has to buy a gift for their mother. The other group of searchers has to buy a gift for their father. (type of product to be determined) Afterwards both groups share their experiences. • How did you start your search process? Why? • Was it easy to find a site where the product was sold? How did you handle this? • What criteria were important in your choice for a specific online shop/site? • Did you also find sites/online shops that sell fake products in your search? How did you identify these online shops/sites with fake products? How can you tell if an online shop/site is trustworthy? What elements do you look for? What elements give the impression that an online shop sells fake

products? (MODERATOR: if the participants have no idea, let them search for websites with fake products online and let them give their feedback afterwards.)

- Were you sure whether the product you bought was a real or a fake? How?
- How do you check this if you are not sure? What are the elements that suggest a legal site/legal product? What are the elements that suggest an illegal site/illegal product?
- Are there also other means to find out whether an online shop/site sells fake products or not? If so, what are they?
- How do you feel about websites/online shops that sell fake products?
- Do you care that the products are fake or original? (If it depends on the product, please indicate the product and your reasons why (not).)
- Why would you go to the legal one and why would go to the illegal one?

If not mentioned spontaneously, **explicitly ask about the role in buying fakes of:**

A conviction that buying fakes is a "smart purchase" and "act of protest against big brands and a market-driven economy" (and any other explanations).

EXPERIENCE WITH BUYING ORIGINAL PRODUCTS

Have you ever purchased original product online? What is your experience (quality/price/delivery/accessibility of website/customer service, etc.)?

EXPERIENCE WITH BUYING FAKE PRODUCTS

- **Have you ever knowingly purchased fakes/have you ever purchased from a site that you know sells fakes?** Tell us more about your experience.
- How is it different from purchasing original products online?
- Have you ever purchased original products online that turned out to be fake products? How did it make you feel?
- How did you find out?
- What did you do?
- Do you think it is clear enough where you can buy fakes and where originals? And how do you assess that (customer service, address, etc.)?
- What would make you go to the sites that sell originals?

Section 5: Communication regarding counterfeiting and piracy (illegally offered content and products / counterfeit products) (15 minutes)

Purpose:

Gain insights in desired communication approach and messages on the topic of counterfeiting and piracy.

Evaluation of current information (8 minutes)	We have been talking about illegal content on the Internet and online shops that sell fake products or offer products illegally. • Have you ever received information about these topics? What information? How? Where? • Have you ever heard about intellectual property? Do you know what this means? • How did you evaluate this information? (usefulness, relevance for you, content, etc.)
Information needs (7 minutes)	• Would you be interested in more communication in this respect and how? - Content: positive and negative (scary, ironic, funny, factual) - Channel? (social media, TV, radio, press, school) - Other? What would make you change your behaviour? (Examples: changing the way products are offered/priced, nothing, legal sanctions, somebody I trust speak about it, bad experiences with ordering fake products or accessing content from illegal sources, etc.: • Specific celebrities? Specific organizations? Specific bloggers? Teachers? Family members? Other (someone who lost their job due to illegal offers of content/products, mother whose child was hurt by a fake toy)?

Section 6: Outro (5 minutes)

Purpose:

Résumé and thank you

Closure (5 minutes)	• Check for extra questions in the client room • Resume most important ideas, and check with group • Exchange thank you

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7. Appendix 2: Country Reports

Intellectual Property and Youth

Focus groups report

AUSTRIA

Digital content from illegal sources	
Country Specific Behaviour	• Legal sources are widely used. • Young people feel safe using illegal sources, because they know there are no heavy sanctions, but still they prefer using legal sources.
General perception	• *Perceived difference between legal and illegal sources offering digital content?* - Young people find it difficult to differentiate between legal and illegal sources. - They think that the more up-to-date the content is, the more likely it is that the source is illegal. • Private use of illegal sources is perceived as common practice and merely a small-scale offence which does not cause great harm.
Legal Sources	**Drivers** - Morals are important when young people decide to use a legal source. They want to do the right thing. **Barriers** - Legal sources sometimes split content, for example one episode of a series into multiple videos. This means having to search for/ download different files and wasting time.
Illegal Sources	**Drivers** - Illegal sources are usually easier to access than legal sources.
Channels	• Most popular channels: - **Legal:** YouTube, Steam, Netflix, Red Bull Rampage, Maxdome - **Illegal:** iTube • Young people prefer to use legal sources, but they often do not provide the content they are looking for.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people perceive someone obtaining financial gains from forgery or deceit as negative and immoral. • They do not think about purchasing counterfeit goods. • They do not judge people who purchase counterfeit goods. • Young people perceive manufacturers' official websites always to be trustworthy.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • People evaluate the sellers based on comments from other buyers. • The most important thing for young people is not to be deceived, which means being sure that you purchase a genuine product when a genuine product is advertised. • The country from which the goods are dispatched is seen as an important factor when young people determine whether a website is trustworthy or not.
Experience	*What experience did respondents have with counterfeit goods?* • The participants have no experience with purchasing counterfeit goods.

BELGIUM

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are widely used. • Young people mention more excuses (rationalisations) for using illegal sources compared to other countries. • Young people often do not know where to find legal sources.
General perception	• Young people think it is "not right" to use illegal sources, but they do it anyway. They mention different excuses to explain their choices: - If they worked, they would have money and then they would be willing to pay to access legal sources. - They buy band merchandise when going to concerts, which also provides income for the artists.

Legal Sources	**Drivers** - The willingness to pay for legal sources is more present if artists appear close to the young people that buy their music. They will more often buy music from a small band because they feel the money will not go to large multinational companies. **Barriers** - Content cannot be downloaded from legal sources the participants say. It can only be watched by streaming and therefore you need a working internet connection to use.
Illegal Sources	**Drivers** - They use illegal sources to make sure that they do not pay for content they do not like. - Young people can watch content without being connected to the internet if they downloaded it to their computer. It is easy to use and they can delete it when they do not need it anymore. **Barriers** - Illegal sources are often blocked by the government.
Channels	• Most popular channels: - **Legal:** YouTube, Shazam, Spotify, iTunes, hln, Instagram, Netflix, Steevie, Vine, Sporza... - **Illegal:** Torrent, Kickass, Downloads.nl, Popcorntime, Cucirka, YouTube MP3 Converter, Pirate Bay... • If legal and illegal sources offer the same content for the same price, young people prefer to use the legal source, otherwise they use illegal sources. • Young people know a lot of legal sources, but they do not use them. This is because illegal sources are easier to access and offer the content for free.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people think it is fine for websites to offer counterfeit goods provided that they do not deceive people or ask for high prices. • They think that counterfeit products are good alternatives for very expensive genuine goods.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • Young people look for customer service details or a contact page when they want to know if a site is trustworthy. • People evaluate the sellers based on comments by other buyers.

	• The most important thing for young people is not to be deceived, which means being sure that they buy a genuine product when a genuine product is advertised.
Experience	*What experience did respondents have with counterfeit products?* • The participants have no experience with purchasing counterfeit goods online.

BULGARIA

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • Young people do not think that using illegal sources has any negative consequences. • Legal sources are often not available. The sources that are accessible are often illegal.
General perception	• The participants have developed their own criteria to determine whether a source is legal or not: - Legal sources provide content permanently, while content from illegal sources is deleted immediately. - Content from illegal sources is expected to be free and the quality of content varies but is generally low.
Legal Sources	**Barriers** - Not many legal sources are available, especially in terms of watching films or TV shows.
Illegal Sources	**Drivers** - Illegal sources provide Bulgarian subtitles, most legal sources don't.
Channels	• Most popular channels: - **Legal:** YouTube, Shazam, Soundcloud, Vbox7.com, Spotify, Steam, Origin, Games company, Playstore - **Illegal:** iTube • Young people know a lot of legal sources, but they do not use them. This is because illegal sources are easier to access and free.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people feel somehow threatened because illegal sources can be deceiving. They feel it is hard to find differences between sources offering counterfeit and genuine goods.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • To decide whether a website sells counterfeit goods, young people look for different aspects: - Terms of payment - Terms of delivery - The possibility of returning a product • In general the participants do not tend to buy counterfeit goods. They seem to make an exception for several products (e.g. T-shirts, perfume) when purchasing them for own use.
Experience	*What experience did respondents have with counterfeit goods?* • Positive: - One participant bought a counterfeit product. He called the website's representatives, returned the product and got his money refunded.

CROATIA

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are widely used. • Young people know that they use illegal sources, but they try to justify their reasons for doing so.
General perception	• Young people think the difference between legal and illegal sources is very unclear.
Legal Sources	• Young people seem to give little thought about the legality of the source.

Illegal Sources	• They mention different excuses than other countries for using illegal sources: - "I care about authors, but not so much that I would pay". - The content is already released and available to anyone. - They already have to pay for the internet. - If the content is used for private purpose only, the use of illegal sources is not seen as harmful.
Channels	• Most popular channels: - **Legal:** YouTube, Vimeo, Project Gutenberg, Libri Vox, Soundcloud, Amazon, Supersport - **Illegal:** Megashare, Putlocker, Mega Series, Pirate Bay, Torrents, Kickass, Iso Hunt, Watch series, Scribd • Young people know a lot of legal sources, but they do not use them. They know even more illegal sources which they use on a daily basis.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people do not have a negative opinion about sources offering counterfeit goods, they consider it normal. • They generally consider buying counterfeit goods as smart purchases. • If they pay a small amount of money, they do not care if the product is counterfeit or not.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • People evaluate the sellers based on comments by other buyers. • Young people are very careful when buying something online. They want to make sure that they do not get deceived. • Websites selling their own brands and websites with a good reputation are often perceived as trustworthy. • They only buy counterfeit goods when the price is low and the risks are small.
Experience	*What experience did respondents have with counterfeit goods?* • One participant bought a counterfeit Ice Watch. She liked it because of the design. She knew it was counterfeit when she purchased it, so she did not feel deceived when the watch arrived.

CYPRUS

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • None of the participants use legal sources for buying or downloading products, services or content.
General perception	• *Perceived difference between legal and illegal sources offering digital content?* - Content from illegal sources is often associated with plagiarism. - These illegal sources are not legally allowed to offer content, products or services. The law prevents them from offering content, products or services.
Legal Sources	• Young people search for a CC-symbol or a license on sources to be sure that the sources they use are legal. In other countries young people do not really look for these things.
Illegal Sources	• Sometimes illegal sources do not deliver what is expected. They do not provide the content they claim to offer.
Channels	• Most popular channels: - **Legal:** YouTube, eBay - **Illegal:** tainiesonline.com • Young people say they use a lot of illegal sources, but when asked which sources they use they only mentioned one illegal source.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Counterfeit goods are often seen as inferior to the original, but still provide sufficient quality. • They do not judge people who purchase counterfeit goods.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • You do not have to buy counterfeit goods. It is better and easier to buy cheaper alternatives that are not imitations. • People evaluate the sellers based on comments by other buyers.

Experience	*What experience did respondents have with counterfeit goods?* • Positive: - The counterfeit product could be used in the same way as the original and the quality was less important. According to the buyer the main difference was that the product did not have a brand logo.

CZECH REPUBLIC

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • Young people do not seem to have any awareness about legal and illegal sources. They do not seem to care about the issue.
General perception	• Young people mention as an excuse that "everybody" in their age group uses illegal sources. • They think that only the organizations behind illegal sources will be punished.
Legal Sources	• Users of legal sources are sometimes offered a full customer experience. They can create a personal profile; they can chat with other users. Legal sources have a more personal approach.
Illegal Sources	• Illegal sources do not mention the author or artist of the content. • Illegal sources violate the law when they share content.
Channels	• Most popular channels: - **Legal:** Steam, YouTube, Spotify, Eurosport online, Uloz.to, TrackID, Google Play • The difference between legal and illegal sources is seen as a grey area. Legal sources may be perceived as illegal if the content they provide is seen as "illegal", for instance an "illegal" video may be uploaded to YouTube, which is seen as a legal source.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Counterfeit products are perceived as "awkward" and embarrassing. • It seems to be unacceptable to use counterfeit goods. Participants are only willing to buy counterfeit electronic goods. • The organization offering the counterfeit goods should mention on their website that the goods are not genuine. If they do not do this, it is perceived as a fraudulent and deceptive business practice.

Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • Young people look for contact details. • They try to collect the goods in person. • People evaluate the sellers based on comments by other buyers.
Experience	*What experience did respondents have with counterfeit goods?* • Negative: - One participant bought a TV-controller, but did not know it was counterfeit. The controller did not work. - Another participant bought a mobile phone, the components were not original. He complained and received an original phone.

DENMARK

Digital content from illegal sources	
Country Specific Behaviour	• Legal sources are mostly used. • They choose to use 1-2 legal sources and additionally 1-2 illegal sources. They only use the illegal sources if the legal sources do not offer what they are looking for.
General perception	• There are no real alternatives for the illegal sources they use. They would have to subscribe to multiple legal sources, but this would be particularly expensive.
Legal Sources	**Drivers** - Young people have a clear conscience when they use legal sources. They prefer to play by the rules.
Illegal Sources	**Drivers** - Illegal sources are subtitled in Danish. Most legal sources are not.
Channels	• Most popular channels: - **Legal:** YouTube, Amazon, Politiken.dk, Hola.com, TV2Play, Spotify, Netflix, Steam, Soundcloud... - **Illegal:** Pirate Bay, YouTube Converter, Letmewatchthis.cn, Popcorntime, Watchseries.net... • Young people prefer to use legal sources, but they often do not provide the content they are looking for.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Only one of the participants does not have issues about purchasing counterfeit goods. • The other participants do not want to buy counterfeit goods because they do not trust the sources offering these goods. • The participants do not judge people who buy counterfeit goods. They only think that people offering counterfeit goods online deceive others and can never be trustworthy.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • The participants evaluate the delivery process and the refund policy to be sure that they will not get deceived. • Young people find it important that they can directly contact the online store. • They are very careful when buying something online. They want to make sure that they do not get deceived.
Experience	*What experience did respondents have with counterfeit goods?* • Positive: - One girl bought counterfeit make-up. She knew that it was not completely legal, but she got the products she wanted. • Negative: - Another participant clicked on a Facebook advertisement and bought nutritional supplements at a very low price. She was forced to cancel the subscription after receiving the first jar. Otherwise, she would have had to pay 1,000 DKK for the next delivery.

ESTONIA

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • Young people do not seem to have detailed knowledge about legal and illegal sources. The main difference made is between paid and free sources.
General perception	• Some illegal sources are widely accepted. Young people mention that everybody in their age group uses illegal sources as an excuse.

Legal Sources	**Drivers** - The willingness to pay for content from legal sources is more present if artists appear close to the young people that buy their music. They will more often buy music from a small band because they feel the money will not go to large multinational companies. - Users of legal sources are offered a full customer experience. They can create a personal profile; they can chat with other users... Legal sources have a more personal approach.
Illegal Sources	**Drivers** - The use of illegal sources is seen as normal.
Channels	• Most popular channels: - **Legal:** YouTube, Spotify, Soundcloud, Soundhound, AppStore, Ebscohost.com, Kanal2, TV3Play, ETV - **Illegal:** Popcorntime, Pirate Bay, Torrent, Kickass • Young people do not seem to care whether a source is legal or not, as long as it is free.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • They do not think about purchasing counterfeit goods. • They do not judge people who purchase counterfeit goods.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • People evaluate the sellers based on comments by other buyers. • Young people think it is difficult to see the difference between a website that offers genuine goods and a website that offers counterfeit goods.
Experience	*What experience did respondents have with counterfeit goods?* • The participants have no experience with purchasing counterfeit goods.

FINLAND

Digital content from illegal sources	
Country Specific Behaviour	• Legal sources are mostly used. • The participants think that the use of illegal sources has decreased because the offer of legal sources has increased substantially.
General perception	• Availability seems more important than the price of the content when it comes to films and TV shows. • Young people prefer legal sources, however downloading or streaming is still very common. Illegal sources are still used because sometimes the content young people look for is only available through the use of illegal sources. • People think it is easy to distinguish the difference between legal and illegal sources. - Illegal sources often offer content for free, but do not explain why it is free. They also do not explain where the content comes from.
Legal Sources	**Drivers** - The willingness to pay for legal sources is more present if artists appear close to the young people that buy their music. They will more often buy music from a small band because they feel the money will not go to large multinational companies. - Young people have a clear conscience when they use legal sources. They prefer to play by the rules. - Legal sources are easy to use and offer special features (e.g. recommendations). - Legal sources are top of mind. Young people feel that legal sources are the best choice. Finland is an exception compared to other countries where illegal sources are much more used and known.
Illegal Sources	**Barriers** - Young people prefer not to download content from illegal sources because they do not want to own something that they perceive as “illegal”. - The social acceptance of using illegal sources is very low. This means that people who use illegal sources regularly are seen as bad people.
Channels	• Most popular channels: - **Legal:** Spotify, Netflix, YouTube - **Illegal:** Torrents • Young people know a lot of legal sources and they also use them regularly.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people assume that the quality of counterfeit goods is very low. • The participants do not judge people who buy counterfeit goods. • They perceive websites that offer counterfeit goods very negatively.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • Young people tend to avoid purchasing counterfeit products. • They do not purchase counterfeit goods online, but they do this on vacation (offline). On vacation, they are more relaxed and they see this as leisure time.
Experience	*What experience did respondents have with counterfeit goods?* • The participants have no experience with purchasing counterfeit goods.

FRANCE

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • Young people grew up with illegal sources. Using illegal sources is a habit that seems hard to change. • Only a minority of people seem to be ill at ease with the idea of using illegal sources.
General perception	• Young people seem to feel comfortable about using illegal sources and mention various reasons for doing so: - The impact of this is limited. - There are more people using legal sources than there are using illegal sources. - Illegal sources are only used occasionally.
Legal Sources	**Drivers** - The willingness to pay for content from legal sources is more present if artists appear close to the young people that buy their music. They will more often buy music from a small band because they feel the money will not go to large multinational companies. - Legal sources can be used on many different locations. For instance, Netflix has an application that allows people to use it anywhere they want.

Illegal Sources	**Drivers** - Young people believe that there is no advantage in paying for content. Quality and other aspects are perceived to be the same for legal and illegal sources. **Barriers** - Illegal sources are not always free of charge.
Channels	• Most popular channels: - **Legal:** Deezer, YouTube, Spotify, iTunes, Soundcloud, Dailymotion, Jeux.com, App Store, Google Play... - **Illegal:** Kakaoweb, Mamzouka, Popcorntime • Young people know a lot of legal sources, but they do not use them. This is because illegal sources are free and easier to access.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Wearing counterfeit clothes is perceived as bad for one's image. • One participant even described counterfeit goods as dirty.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • Young people tend to avoid risky situations. They do not want to get deceived. • To decide whether a website sells counterfeit goods, young people look for different aspects: - Terms of payment - Terms of delivery - The possibility of returning the product • They always compare several websites to make sure that they purchase genuine products.
Experience	*What experience did respondents have with counterfeit goods?* • Positive: - One participant deliberately bought counterfeit clothes. The purchase was satisfactory.

GERMANY

Digital content from illegal sources	
Country Specific Behaviour	• Legal sources are widely used. • Young people only use legal sources. They do not know any illegal sources.
General perception	• They think that illegal sources are hard to find. They quickly get shut down.
Legal Sources	**Drivers** - Young people have a clear conscience when they use legal sources. They do not like to do illegal things. - If a legal source does not work, they can always contact someone from the website. **Barriers** - Some legal sources (e.g. Amazon, Google) are seen as very powerful.
Illegal Sources	• Young people do not seem to use illegal sources.
Channels	• Most popular channels: - **Legal:** iTunes, YouTube, Amazon, Spotify, Idealo.de, Steam... - **Illegal:** Kino.to, laola.tv • Young people are willing to pay for quality. They know some illegal sources, but they do not use them at all.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people do not want to buy counterfeit goods because the products are perceived to be fake, of poor quality and illegal.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • To make sure a website sells genuine products, they compare offers across websites. • They do not purchase counterfeit goods online, but they do this on vacation. On vacation, they are more relaxed and they see this as leisure time.
Experience	*What experience did respondents have with counterfeit goods?* • Participants have no experience with purchasing counterfeit goods.

GREECE

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • Young people use the economic crisis as an excuse for using free, illegal sources. • They say they do not have the money to pay for legal sources. • The notion of illegal sources is becoming obsolete because young people find it hard to believe that "something everybody does" is illegal.
General perception	*Perceived difference between legal and illegal sources offering digital content?* - Some illegal sources are widely accepted. Young people mention as an excuse that everybody in their age group uses illegal sources. - Young people assess the legality of sources based on their popularity. They perceive widely known sources as legal. Sources such as YouTube have to be "legal", because so many people use it. They believe that an illegal source cannot become popular or will not be used by many people.
Legal Sources	**Drivers** - The willingness to pay for legal sources is more present if artists appear close to the young people that buy their music. They will more often buy music from a small band because they feel the money will not go to large multinational companies.
Illegal Sources	**Drivers** - Downloading is fast and can be done overnight.
Channels	• Most popular channels: - **Legal:** YouTube, Spotify, M-torrent • M-Torrent is an illegal channel. According to the participants it is seen as a legal channel because it is so widely known.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people say that others will "make fun of them" if they buy counterfeit products and therefore tend to avoid them. Some participants had already bought counterfeit goods (e.g. Nike shoes); this is in contrast with what they say.

Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • Young people buy counterfeit goods in product categories that are not seen as particularly important, such as clothes or accessories that are fashionable for a season. • Greek people find trustworthiness very important when buying online – feeling safe is important to them. - They use e-shops that have a physical stores in Greece. - They use websites that seem important and genuine, for instance websites that are also used by "grown-ups". - They search for the "VerySign" when they pay for a product.
Experience	*What experience did respondents have with counterfeit goods?* • Negative: - One participant bought clothes that were never delivered. • Positive: - Some participants bought counterfeit goods, knowing they were not genuine. The products were fine and perfectly functional.

HUNGARY

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are widely used. • Young people grew up with illegal sources. Using illegal sources is a habit that seems hard to change.
General perception	• Young people do not seem to care whether the source they use is legal or not.
Legal Sources	• Young people do not think that there are any advantages in using legal sources.
Illegal Sources	**Drivers** - Young people believe that there is no advantage in paying for content. Quality and other aspects are perceived as equal for legal and illegal sources.
Channels	• Most popular channels: - **Legal:** YouTube, Port.nu - **Illegal:** nCore, Torrent • Young people do not know which sources are legal and which are not.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people do not really care whether goods are counterfeit or not. They just do not want to be deceived.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • Young people rarely buy counterfeit goods. • When young people buy counterfeit goods, they don't expect the quality to be the same as the original product's. • To decide whether a website sells counterfeit goods, young people look for different aspects: - Is the site widely known? - Clear indication of the company - Contracts available - Possibility to contact the company
Experience	*What experience did respondents have with counterfeit goods?* • Positive: - Two participants knowingly bought a counterfeit watch. The quality was not very good, but the price was very low.

IRELAND

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are widely used. • Young people are mostly interested in convenience, quality and availability. • Young people use 'grey' channels. These consist of sources that are not available in Ireland, but are legal in other countries.
General perception	*Perceived difference legal/illegal?* - Young people prefer to use legal channels, but sometimes the difference between legal and illegal sources is very unclear.
Legal Sources	**Drivers** - Users of legal sources are offered a full customer experience. They can create a personal profile; they can chat with other users Legal sources have a more personal approach. - Some people do not mind paying for legal sources if the quality is better than the quality of the illegal source.

	- The willingness to pay for legal sources is more present if artists appear close to the young people that buy their music. They will more often buy music from a small band because they feel the money will not go to large multinational companies.
Illegal Sources	• They mention different excuses for using illegal sources. - The content is already released and available to everyone. - A lot of people do it.
Channels	• Most popular channels: - **Legal:** Shazam, YouTube, Netflix, Google Play, Spotify, iTunes, BBC iplayer, 4OD... - **Illegal:** Musictube, Pirate Bay, Torrent, Primewire, Watchmoviesonline.com • Young people prefer to use legal sources, but they often do not provide the content they are looking for.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • The participants think that websites that offer counterfeit goods without explicitly mentioning it are scamming people. • They do not judge people who purchase counterfeit goods. They understand why they do it. • A lot of young people purchase counterfeit goods.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • Young people tend to avoid risky situations. They do not want to get deceived. • To decide whether a website sells counterfeit goods, young people look at different aspects: - Terms of payment - Terms of delivery - The possibility of returning the product
Experience	*What experience did respondents have with counterfeit goods?* • Positive: - Multiple participants purchased illegal products online. These products are unlicensed in Ireland (e.g. tanning tablets, Xanax) - One participant bought counterfeit Michael Kors bags. They were much cheaper than the genuine ones. She knew they were counterfeit goods, but she was happy with them.

ITALY

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used for downloading. Legal resources are mostly used for streaming. • Young people grew up with illegal sources. Using illegal sources is a habit that seems hard to change. • Spotify has changed the way some people enjoy music. It is the easiest way to save playlists, stream music...
General perception	• Attitude towards illegal sources offering digital content? - Young people assess the legality of sources based on their popularity. They perceive widely known sources as legal. Sources like YouTube have to be legal because so many people use them. - They think that legal channels pay to publish the work of artists. • Perceived difference between legal and illegal sources offering digital content? - Using illegal sources is a habit, "everybody" does it. - It is not perceived as a relevant issue
Legal Sources	• Legal sources can be free with advertisements. They use sources like Spotify and YouTube on a daily basis.
Illegal Sources	• Sometimes illegal sources do not deliver what is expected from them. They do not provide the content they claim to offer.
Channels	• Most popular channels: - **Legal:** YouTube, Spotify, Shazam, Soundcloud, FoxTube - **Illegal:** Rojadirecta (for live streams), Pirate Streaming, Torrent, eMule, Megavideo • Young people know a lot of legal channels for streaming. When it comes to downloading, they do not know legal sources so they use illegal sources.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people do not judge the sources that offer counterfeit goods. • They do not judge people that buy counterfeit goods. • They believe counterfeit goods are almost the same as genuine goods. Sometimes the quality is inferior, but they do not mind when they have to pay less.

Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • People evaluate the sellers based on comments by other buyers. • For safety reasons, young people prefer to pay with PayPal or pre-paid cards. They then feel sure that the payment is safe.
Experience	*What experience did respondents have with counterfeit goods?* • The participants have purchased several counterfeit goods (e.g. Nike shoes, shirt of a soccer team). The counterfeit goods were almost the same as the genuine products. Most people would not spot the difference.

LATVIA

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • Young people grew up with illegal sources. Using illegal sources is a habit that seems hard to change. • They do not look at whether the source they use is legal or not. They just use Google, type in what they need and click on one of the first links on the screen.
General perception	• Young people do not seem to care whether the source they use is legal or not.
Legal Sources	**Drivers** - Social acceptance: young people believe that their friends will judge them when they use illegal sources. - Young people are aware of the importance of respecting IP.
Illegal Sources	**Drivers** - Young people can watch content without being connected to the internet if they have previously downloaded it on their computer. It is easy to use and they can delete it when they do not need it. - Legal sources can only be watched while streaming. You need a working internet connection to be able to use them. - Some illegal sources offer the same quality as legal sources. **Barriers** - Sometimes illegal sources do not deliver what is expected. They do not provide the content they claim to offer.

Channels	• Most popular channels: - **Legal:** YouTube, Vkontakte.ru, sportacentrs.com, Spotify, Deezer, iTunes - **Illegal:** Torrent • The use of legal sources seems to be unpopular amongst young people.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • The participants do not understand why people would purchase counterfeit goods. • Young people do not judge sources offering counterfeit goods.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • Counterfeit goods are only purchased in specific categories like clothing or small accessories. For these categories origin is not of importance.
Experience	*What experience did respondents have with counterfeit goods?* • The participants have no experience with purchasing counterfeit goods.

LITHUANIA

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are widely used. • Young people grew up with illegal sources. Using illegal sources is a habit that seems hard to change. • The use of illegal sources goes against their moral code. Nevethelesss and in reality, it is better to use free illegal sources than to have no sources at all.
General perception	• Young people do not know the difference between illegal and legal sources.
Legal Sources	**Drivers** - Young people search for a copyright symbol or a license on sources to be sure that the source they use is legal.

	- The willingness to pay for legal sources is more present if artists appear close to the young people that buy their music. They will more often buy music from a small band because they feel the money will not go to large multinational companies. - They are more willing to pay for content they will use for a longer time. Young people like to know that they have legal content when they use it for a long time. **Barriers** - There is a feeling of lack of safety. When searching content online, young people never feel really safe about the purchase.
Illegal Sources	**Drivers** - Some illegal sources offer the same quality as legal sources. Illegal sources are widely available and used by friends, family. Young people feel emotionally comfortable about using illegal sources. **Barriers** - The use of illegal sources is seen as unfair towards the artists.
Channels	• Most popular channels: - **Legal:** YouTube, Soundcloud, Zippyshare, TV3Play, 15min.it, irt.it, inkgo.alfa.it, delfi.it - **Illegal**: Linkomaija, Filmai.it, Torrent • Young people know a lot of legal sources, but they do not use them. This is because illegal sources are easier to access and free.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • They do not think about purchasing counterfeit goods. • They do not judge people who purchase counterfeit goods. • They do not judge sources that offer counterfeit goods.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • They tend to avoid risks. Young people want to be sure that they do not get deceived. • It is hard to spot the differences between websites offering genuine products and websites offering counterfeit goods.
Experience	*What experience did respondents have with counterfeit goods?* • The participants have no experience with purchasing counterfeit goods.

LUXEMBOURG

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are widely used. • Young people do not have a bad conscious when they use illegal sources. They do not feel guilty at all. • Young people grew up with illegal sources. Using illegal sources is a habit that seems hard to change.
General perception	• When searching for content, legal sources should be in the top results when searching through a search engine. Now most of the sources in the top results are illegal.
Legal Sources	• There are no country specific conclusions when it comes to legal sources.
Illegal Sources	Barriers - Sometimes illegal sources do not deliver what is expected. They do not provide the content they claim to offer. - Illegal sources are often blocked or interrupted.
Channels	• Most popular channels: - **Legal:** YouTube, Netflix, Sport1, Eurosport, Miniclip - **Illegal**: iTube, Kinos.to, Movie4K, Movie2K, Serienjunkies.com, Vomanol.com • Young people do not seem to care whether a source is legal, as long as it is free.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* - Young people always perceive manufacturers' official websites as trustworthy. - The probability of shopping for counterfeit goods is rather low. - Young people do not judge people who buy counterfeit goods. - They do not judge the sources that offer counterfeit goods.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • They tend to avoid risks. Young people want to be sure that they do not get deceived. • Safety is perceived as very important. To decide whether a website sells counterfeit goods, young people look for different aspects:

	- Payment terms - Terms of delivery - The possibility of returning the product
Experience	*What experience did respondents have with counterfeit goods?* • Positive - One participant purchased in-ear headphones. He had to pay €20 additional custom costs. Instead of receiving the product he ordered, he received a complete headphone. The product was considered of higher value than the money he paid.

MALTA

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are widely used. • There was no country specific behaviour; young people from Malta follow the overall patterns of behaviour observed in the survey.
General perception	• Not all young people seem to care about the use of legal and illegal sources.
Legal Sources	**Drivers** - Legal sources are perceived as reliable. They guarantee safety for their users.
Illegal Sources	• Young people seem to identify illegal sources in different ways. - Some participants think that illegal sources are free sources. - Other participants assume that illegal sources have long download times.
Channels	• Most popular channels: - **Legal:** Spotify, YouTube - **Illegal**: Torrent

Online purchase of counterfeit goods	
Perception	*How do respondents perceive the difference between legal & illegal websites?* • Counterfeit goods were perceived as better in some specific product categories, such as fur clothing. • Young people do not judge people who purchase counterfeit goods. • Young people do not judge sources offering counterfeit goods.

Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • To decide whether a website sells counterfeit goods, young people look for different aspects: - Payment terms - Terms of delivery - Serial numbers of products
Experience	*What experience did respondents have with counterfeit goods?* • Negative - One participant bought 3 mobile phones. He never received the counterfeit goods.

THE NETHERLANDS

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • Young people grew up with illegal sources. Using illegal sources is a habit that seems hard to change. • Illegal sources are a popular item to talk about. Young people share a lot of tips and tricks among each other.
General perception	• Young people do not seem to care whether the sources they use are legal or not.
Legal Sources	• Young people share access passwords for legal sources. If one person pays, several people are able use the account. This reduces the costs of using legal sources.
Illegal Sources	• They mention different excuses for using illegal sources. - If the content is used for private purpose only, it is not seen as harmful. **Barriers** - Young people do not always find the content they want on illegal sources.
Channels	• Most popular channels: - **Legal:** iTunes, YouTube, Spotify, Netflix - **Illegal**: Popcorntime, Netflix • Subscriptions to channels like Netflix, iTunes and Spotify are often paid by the parents of young people.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Counterfeit goods are not seen as "trendy". Young people are not actively looking for them. • When asked about their opinion on websites offering counterfeit goods, they answer that this is "not done!"
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • They tend to avoid risks. Young people want to be sure that they will not get deceived.
Experience	*What experience did respondents have with counterfeit goods?* • The participants have no experience with purchasing counterfeit goods.

POLAND

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are widely used. • Young people grew up with illegal sources. Using illegal sources is a habit that seems hard to change.
General perception	• Young people are not sure what sources are actually illegal. They do not want to break the law, but they do not know for sure what is legal and what is not. • They believe that better awareness would motivate them to use legal sources.
Legal Sources	**Drivers** - The willingness to pay for content from legal sources is more present if artists appear close to the young people that buy their music. They will more often buy music from a small band because they feel the money will not go to large multinational companies.
Illegal Sources	**Drivers** - They use illegal sources to make sure that they do not pay for content they do not like. **Barriers** - There is a risk of hidden charges. Sometimes it looks like the illegal source is free, but in fact it's not.

	• They mention different excuses for using illegal sources. - If the content is used for private use only, it is not seen as harmful.
Channels	• Most popular channels: - **Legal:** YouTube, Spotify, Soundcloud, Dailymotion, PlayTube, Ipla, SCS, VOD - **Illegal**: Seansik.tv, Tvfilmfy, Kinomaniak, Battle.net, Kurnik, Minutapomunicie, CDA, 02.pl, Torrent • Young people know a lot of legal sources, but they are not sure whether they are using them legally.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people think it is hard to see whether a source offers genuine or counterfeit goods. • They do not judge sources that offer counterfeit goods, unless they are mentioned explicitly. • Young people perceive manufacturers' official websites always as trustworthy.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • They tend to avoid risks. Young people want to be sure that they will not get deceived. • People evaluate the sellers based on comments by other buyers. • Young people compare several websites to make sure that they buy genuine products.
Experience	*What experience did respondents have with counterfeit goods?* • Positive - Counterfeit Ray-Ban sunglasses look the same as the original ones. • Negative - One participant bought an Adidas jumper. All the official tags were on the jumper. A few years later, the police contacted him. The website that offered the counterfeit goods got sued.

PORTUGAL

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are widely used. • Young people grew up with illegal sources. Using illegal sources is a habit that seems hard to change.
General perception	• Young people do not seem to have detailed knowledge about legal and illegal sources. They do not seem to care about the issue. • There is no clear distinction between legal and illegal sources.
Legal Sources	• There does not seem to be an exact notion of which sources are legal. - "The internet is illegal!"
Illegal Sources	• Different excuses for using illegal sources are mentioned: - "Artists already earn enough money." - The content is already released and available to anyone. - "Why pay when you can get it for free?"
Channels	• Most popular channels: - **Legal:** YouTube, Spotify, iTunes - **Illegal**: YouTube MP3 Converter, aTube Catcher, Wareztuga, • Young people know that the sources they use most are illegal.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive the difference between legal & illegal websites?* • The participants do not think that there are any specific sources offering counterfeit goods. • Young people do not judge people who purchase counterfeit goods. • Young people think counterfeit goods (sold on- and offline) are produced in poor working conditions.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • They tend to avoid risks. Young people want to be sure that they do not get deceived. • Purchasing counterfeit goods is considered smart. The goods look like the original ones; the only differences are quality and price.
Experience	*What experience did respondents have with counterfeit goods?* • The participants have no experience with purchasing counterfeit goods.

ROMANIA

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are widely used. • Young people think that in other countries illegal sources are more controlled. • They do not really care where they get what they want, as long as they find what they want.
General perception	• Perception of differences between legal and illegal sources offering digital content: - Legal sources require you to create an account. - Young people perceive legal sources as widely known. Sources like YouTube have to be legal, since so many people use them.
Legal Sources	**Barriers** - Legal sources often spam with mailings and posts on social media. For example Spotify is linked to your Facebook and posts which songs you are listening to.
Illegal Sources	**Barriers** - Illegal sources often indicate that they are not liable for the content they provide. They also indicate that they are not liable for the users' actions.
Channels	• Most popular channels: - **Legal:** YouTube, Twitch, Steam, iTunes, SkyFM - **Illegal**: Filelist, Pirate Bay, Torrents, Srialeonline, Kickass, Meciuronline, CoolTV • Young people do not seem to care whether a source is legal or not, as long as it is free.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people do not judge people who buy counterfeit goods. • They do not judge sources that offer counterfeit goods.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • People evaluate the sellers based on comments by other buyers. • To decide whether a website sells counterfeit goods, young people look for different aspects: - Terms of payment - Terms of delivery - Serial numbers of products

Experience	*What experience did respondents have with counterfeit goods?* • Positive: - The participants purchased several counterfeit goods (e.g. shirts, boxing gloves...). The price/quality ratio was sufficient.

SLOVAKIA

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • Young people do not care about the difference between legal and illegal sources as long as they do not harm them. • They do not really care which channel they use to get what they want as long as they get it.
General perception	• They only guess whether a source is legal or not.
Legal Sources	**Drivers** - With legal sources there is no limit on the volume of downloaded data.
Illegal Sources	**Drivers** - Illegal sources are usually easier to access than legal sources. **Barriers** - Young people do not always find the the content they are looking for on illegal sources.
Channels	• Most popular channels: - **Legal:** YouTube, Ulotzo.sk - **Illegal:** Torrents • Young people do not seem to care whether a source is legal or not, as long as it is free.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people seem to reject the idea of counterfeit goods. They prefer to purchase a generic product. They do not want to buy "a product that is pretending to be something it is not."
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • People evaluate the sellers based on comments by other buyers. • To decide whether a website sells counterfeit goods, young people look for different aspects:

	- Terms of payment - Terms of delivery - Serial numbers of products
Experience	*What experience did respondents have with counterfeit goods?* • Negative: - Some participants purchased counterfeit clothing and perfume of very poor quality.

SLOVENIA

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • Young people do not seem to care whether the source they use is legal or not. • Participants see YouTube as an illegal source. - YouTube is becoming less popular due to advertisements that appear more and more frequently. - YouTube is seen as an illegal source because anyone can upload content. • The participants believe that when content is put online, they are allowed free access to it.
General perception	• Young people think the difference between legal and illegal sources is very unclear. - They consider content as illegal when it is uploaded and offered without the consent of the artists. - They consider sources as illegal when they are used for general education (e.g. national TV or popular scientific content). - Young people do not consider streaming and online watching/ listening illegal. - Young people perceive widely known sources as legal.
Legal Sources	**Drivers** - The willingness to pay for legal sources is more present if artists appear close to the young people that buy their music. They will more often buy music from a small band because they feel the money will not go to large multinational companies. **Barriers** - Legal sources are not always available. Sometimes there are only a few possible types of payment.

Illegal Sources	**Barriers** - Illegal sources often have several malfunctions (e.g. the image freezes, links do not work).
Channels	• Most popular channels: - **Legal:** 24ur, RTV, SLO, YouTube, Amazon, Voyo - **Illegal**: Putlocker, Pirate Bay, Partis, Solar movie • Young people do not seem to care whether a source is legal or not, as long as it is free.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive the difference between legal & illegal websites?* • Young people perceive no big differences between genuine and counterfeit goods. • The participants do not give counterfeit goods a lot of thought. They find the financial advantage more important.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • They tend to avoid risks. Young people want to be sure that they do not get deceived. • To decide whether a website sells counterfeit goods, young people look for different aspects: - Terms of payment - Terms of delivery - Serial numbers of products
Experience	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Positive: - Most participants have already purchased counterfeit goods and were pleasantly surprised.

SPAIN

Country Specific Behaviour	• Illegal sources are widely used. • Young people often do not consider using legal sources. They do not seem to need them.

General perception	• Young people do not seem to care whether the source they use is legal or not.
Legal Sources	**Drivers** - Young people feel that it is easy to find content using legal sources. - If they like the legal sources, they prefer to pay for the source to profit from all the advantages that come with it.
Illegal Sources	**Drivers** - They use illegal sources to make sure that they do not pay for content they do not like. - Young people think that they can get any kind of content from illegal sources for free. They just have to search for it.
Channels	• Most popular channels: - **Legal:** YouTube, Spotify, Ares, JDownloader, Wuaki - **Illegal**: Torrent, aTube Catcher, Rojadirecta, Series.ly • Young people know legal sources, but they do not use them. They prefer to use free, illegal sources.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive the difference between legal & illegal websites?* • Young people do not feel confident about purchasing counterfeit goods online. They often do not trust the websites. • Some participants value quality and do not want to buy counterfeit goods. • Other participants accept counterfeit goods depending on the products (e.g. football T-shirts).
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • They tend to avoid risks. Young people want to be sure that they do not get deceived. • People evaluate the sellers based on comments by other buyers.
Experience	*What experience did respondents have with counterfeit products?* • Negative: - One participant purchased a counterfeit iPhone. The quality was terrible.

SWEDEN

Digital content from illegal sources	
Country Specific Behaviour	• Legal sources are widely used. • Young people prefer legal sources, however downloading or streaming online digital content is still very common.
General perception	• There are no real alternatives for the illegal sources they use. They would have to subscribe to multiple legal sources, but this would be particularly expensive.
Legal Sources	**Drivers** - Young people have a clear conscience when they use legal sources. They prefer to play by the rules.
Illegal Sources	**Barriers** - Young people often receive warnings when they go to illegal sources. When they see these warnings, they look for another source.
Channels	• Most popular channels: - **Legal:** Spotify, YouTube, Netflix, Channel5, SVT, TV4, TV3, CNN, Amazon, Viaplay, Readly.com, Aldibris.se - **Illegal**: Swefilm, Tjock.se, Pirate Bay • Young people always start with legal channels. If they do not find what they are looking for, they will use illegal channels.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people seem not to be interested in counterfeit goods. • They do not judge people who purchase counterfeit goods. • They do not judge sources offering counterfeit goods. Only misleading sources are problematic.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • People evaluate the sellers based on comments by other buyers. • They tend to avoid risks. Young people want to be sure that they do not get deceived. • To decide whether a website sells counterfeit goods, young people look for different aspects: - Terms of payment - Terms of delivery - Serial numbers of products

Experience	*What experience did respondents have with counterfeit products?* • The participants have no experience with purchasing counterfeit goods.

UK

Digital content from illegal sources	
Country Specific Behaviour	• Illegal sources are mostly used. • Young people who do not use different sources everyday use legal sources more often. They are also willing to pay for legal sources. • Young people also use 'grey' channels. These consist of sources that are not available in the UK, but that are legal in other countries.
General perception	*Perceived difference legal/illegal?* - Young people prefer to use legal sources, but sometimes the difference between legal and illegal sources is very unclear.
Legal Sources	**Drivers** - The willingness to pay for legal sources is more present if artists appear close to the young people that buy their music. They will more often buy music from a small band because they feel the money will not go to large multinational companies. - Social acceptance is also an important reason for choosing legal sources. Among friends young people use legal sources. Alone, they sometimes use illegal sources when they cannot find what they are looking for on legal sources.
Illegal Sources	• Illegal sources are not accessible in the UK, but they are legal in other countries. • They mention different excuses for using illegal sources: - The content is already released and available to anyone. - Legal sources are seen as too expensive.
Channels	• Most popular channels: - **Legal:** YouTube - **Illegal**: Torrent • Young people always start with legal sources. If they do not find what they are looking for, they use illegal sources.

Online purchase of counterfeit goods	
Perception	*How do respondents perceive legal/illegal sources offering counterfeit goods?* • Young people do not judge people who purchase counterfeit goods. • They do not judge sources offering counterfeit goods.
Attitude/Behaviour	*What attitude do respondents show towards buying counterfeit goods online? What behaviour do respondents show?* • Some participants purchase counterfeit goods in specific product categories (e.g. make-up, clothing). • People evaluate the sellers based on comments by other buyers. • To decide whether a website sells counterfeit goods, young people look for different aspects: - Terms of payment - Terms of delivery - Serial numbers of products • They tend to avoid risks. Young people want to be sure that they do not get deceived.
Experience	*What experience did respondents have with counterfeit products?* • Positive: - Two participants purchased counterfeit goods and the products had a sufficient level of quality. • Negative: - One participant ordered counterfeit goods and they were never delivered, although he paid for the goods. - One girl bought a necklace. It was obvious that it was a fake and it looked cheap.

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8. Appendix 3: Questionnaire

Intellectual Property and Youth

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Structure of the questionnaire

Introduction

I. Screening

II. Usage/purchase patterns and drivers

III. Physical goods

IV. Digital content

V. Experiences

VI. Background

Introduction

GfK is conducting a survey for an agency of the European Union. This survey is about what young people in Europe do on the internet and how they think about piracy and fake products that are being sold online.

GfK will interview young people between 15 and 24 years old in all 28 countries of the European Union.

We thank you very much in advance for completing this questionnaire, which will take about 15 minutes.

In this questionnaire we use the words **"legal sources"** for the websites that offer **content** (films, music, e-books, TV shows, sport events, games etc.) **with the permission** of the people that hold the rights to the content, for example authors, creators, performers and producers.

"Legal sources" is also used for sources (sellers, traders, shops...) that offer **original products** for sale on the internet.

With **"illegal sources"** we mean websites that offer **content** (films, music, e-books, TV shows, sport events, games etc.) **without the permission** of the rights owners. It is used for sellers, traders and shops that sell **fake products** online.

All the answers to this questionnaire will remain confidential, so the answers will in no way be linked to your personal details. The answers will only be used for research on the topic of piracy and fake products being sold online.

GfK follows all relevant European data protection regulations and the Code of Conduct from ESOMAR (ESOMAR is the world association for market, social and opinion researchers).

I. Screening

ALL

SC1. What is your age?
[15+]
DP: Screening question. If I1 < 15 STOP INTERVIEW, go to end screen
DP: If I1 = [15-24], go to II1

FILTER: If I1 > 24
SC2. Are you the parent or legal guardian of a child between the ages of 15 and 24?
1. Yes
2. No
DP: Screening question. If I2 = 2 STOP INTERVIEW, go to end screen

FILTER: If I2 = 1
SC3. What is your child's age?
[15-17]
DP: Screening question. If I3 < 15 or I3 > 24 STOP INTERVIEW, go to end screen

FILTER: If I3 = [15-24]
SC4. Would you permit your child aged 15 to 24 to participate in a survey regarding what young people in Europe do on the internet and how they think about piracy and fake products that are being sold online?
1. Yes
2. No
DP: Screening question. If I4 = 2 STOP INTERVIEW, go to end screen

FILTER: If I4 = 1
SC5. Thank you for giving your consent. Please be assured that your child will not be asked to purchase anything, we are only interested in his/her opinions. Now we would like you to bring your child between the ages of 15 and 24 to the computer. From this point forward your teenager should complete the survey on their own, without any assistance from you. Please click continue to start the survey.
1. Yes, I will now bring my child to the computer and click continue.
2. No, I would like to stop the survey.
DP: Screening question. If I5 = 2 STOP INTERVIEW, go to end screen

II. Usage/purchase patterns and drivers

FILTER: IF I1 = [15-24] OR I5 = 1

II1. Which of the following products have you bought online during the past 12 months?

DP: multiple, option 18 = single, do not rotate

1. Clothes & accessories
2. Footwear
3. Sportswear & equipment
4. Hygiene, cosmetics, personal care & perfume
5. Jewellery & watches
6. Medication
7. Toys
8. Music and films (on CD, DVD, Blu-ray Disc...)
9. Books and magazines
10. Larger electronic devices (computers, cameras, consoles...)
11. Small electronic devices (USB sticks, earphones, rechargers...)
12. Telecom equipment (phones & accessories...)
13. Household cleaning & laundry products
14. Foodstuffs & beverages
15. Tickets (transport, events...)
16. Games (on DVD, Blu-ray Disc)
17. Other
18. I have not bought a product online in the past 12 months

FILTER: IF II1 < 17

DP: rotation of items

DP: ranking of 5 choices

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.

1. That I have plenty of choice *(CHOICE)*
2. That the item is cheap *(PRICE)*
3. That the item is easy to find *(USERFRIENDLINESS)*
4. That it is easy to pay for the item *(USERFRIENDLINESS)*
5. That the item is of good quality *(QUALITY/SAFETINES)*
6. That I can trust the vendor that sells the products *(TRUST)*
7. That the site is safe (there is no or low risk of malware, viruses...) *(SAFETY)*

8. That the site offers consumer protection: I can send the item back within the legal period if I decide that I don't want it *(CONSUMER PROTECTION)*
9. That the payment method is safe *(CONSUMER PROTECTION)*
10. That the item is original, not fake *(GENUINENESS)*
11. That I get the item as quickly as possible *(SPEED OF DELIVERY)*
12. That I can buy the item anytime and anywhere *(CONVENIENCE)*
13. That I can buy items that are not available in stores in my country *(AVAILABILITY)*

ALL

II3. How often have you listened to, watched, read, used, played, downloaded... the following content from the internet during the past 12 months?

DP: gridline, single

	How often?				
	1	2	3	4	5
	daily	weekly	monthly	rarely	never
Films/series					
Music					
Games *This also includes App games (to be played on tablet or smart phone)*					
E-books					
E-newspapers and magazines					
TV shows and sport events					
Educational content *With this we mean content related to school/college subjects and tasks*					
Other, please specify: *For example: videos uploaded by users on YouTube, e.g. video in which a user sings a song, video in which a user shows how to use make-up, video in which a user dances to a certain song, video in which a game fragment has been played online...*					

FILTER: ONLY SHOW OPTIONS II3a to II3h < 5

II3a. What do you do most?

DP: gridline, single

	1	2	3
	Streaming/ playing/reading	Downloading/ copying to your device (e.g. computer or smartphone)	Both streaming/ playing/ reading AND downloading/ copying to your device (e.g. computer or smartphone)
a) Films/Series			
b) Music			
c) Games			
d) E-books			
e) E-newspapers and magazines			
f) TV shows and sport events			
g) Educational content			
h) Other			

DP: Add the following explanation on screen

- What is streaming digital content? The content is being played (e.g. a film or music) without the content file being saved on your device (e.g. computer or smart phone)

- What is downloading digital content? The content (e.g. a film or music) is being saved on your device (e.g. computer or smart phone)

FILTER: IF at least one option II3a to II3h < 5
DP: rotation of items
DP: ranking of 5 choices

II4. If you want to use, play, download or stream content from the internet such as *[insert answer categories indicated in II3]* **what is more important to you?**
Please select 5 things you find most important, and rank them in your TOP 5.

1. That there is plenty of choice in content *(CHOICE)*
2. That the content is cheap or is free of charge *(PRICE)*
3. That I can pay in an easy way for the content that I want *(EASY PAYMENT)*
4. That I can pay per item (e.g. one song and not the whole album or one episode and not the entire series) *(PAY PER CONTENT)*
5. That I can pay a subscription fee (for example monthly) and then have access to all the content included in the subscription *(SUBSCRIPTION)*
6. That the site/source is safe *(there is no or low risk of malware, viruses...) (SAFETY)*
7. That the site is user-friendly (it is easy to find the content I want and to start the streaming/downloading/playing) *(USER-FRIENDLINESS)*
8. That I can get and reuse the content on any device *(COMPATIBILITY)*
9. That I do not risk having my account blocked or having to pay a fine *(RISK)*
10. That the site/source seems to me to offer content on a legal basis *(LEGALITY)*
11. That the content is of good quality *(QUALITY)*
12. That I do not need to register on the site to access, download or stream the content *(NO REGISTRATION)*
13. That I can access, download or stream the content in other countries too *(CROSS BORDER USAGE)*
14. That I can resell the file I bought in a form that would allow reuse *(RESALE POSSIBILITY)*
15. That I can download or stream the content quickly *(SPEED)*

As mentioned, all answers to this survey will remain anonymous and no one will be able to identify you following this survey.

III. Physical goods

ALL

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?
DP: single
1. Yes
2. No
3. For some websites I do and for others I don't

FILTER: IF II1 < 17
III2. During the past 12 months, have you bought online a fake product (for instance *[insert answer categories indicated in II1])?*
DP: single
1. Yes, intentionally
2. Yes, but only by accident
3. No
4. I don't know

DP: Add the following explanation on screen
"Intentionally means deliberately; you were aware that the product(s) you ordered was (were) fake."
FILTER: IF III2 = 1
III3. Which type of fake product(s) did you buy online? Please indicate all that apply.
DP: multiple, do not rotate
1. Clothes & accessories
2. Footwear
3. Sportswear & equipment
4. Hygiene, cosmetics, personal care & perfume
5. Jewellery & watches
6. Medication
7. Toys
8. Music and films (on CD, DVD, Blu-ray Disc...)
9. Books and magazines
10. Larger electronic devices (computers, cameras, consoles...)
11. Small electronic devices (USB sticks, earphones, rechargers...)

12. Telecom equipment (phones & accessories...)
13. Household cleaning & laundry products
14. Foodstuffs & beverages
15. Tickets (transport, events...)
16. Games (on DVD, Blu-ray Disc)
17. Other

FILTER: IF III2 =

III4. You indicated that you have bought intentionally a fake product (for instance [insert answer categories indicated in III3]**) online during the past 12 months. What was the reason for this? Please indicate all that apply.**

DP: multiple, rotate, option 1 to 11

1. Because people around me do this
2. Because a fake product is cheaper
3. Because there is more choice amongst fake products
4. Because a fake product is a good deal
5. Because you get a fake product faster
6. Because I don't know why I should not do it
7. Because it is much easier to find and order a fake product
8. Because the sites offering original products do not deliver to my country
9. Because of protest against big brands
10. Because I don't see the difference between a genuine and a fake product
11. Because I don't care whether it is a genuine or a fake product
12. Other, please specify:

FILTER: IF III2 = 1

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.

DP: multiple, option 8 = single, rotate option 1 to 7

1. Risk of punishment
2. Personal bad experience with a fake product
3. Bad experience of friends and/or family with a fake product
4. Bad experience of others with a fake product
5. Harm to my image: others would judge me because of having / wearing fake items
6. Availability of affordable original products
7. A better understanding of the harm caused by my behaviour to the producers of the original products

8. Nothing would make me stop [radio button]

FILTER: IF III2 = 2 or 3

III6. You indicated that you have not bought intentionally a fake product online during the past 12 months. What was the reason for this? Please indicate all that apply.

DP: multiple, rotate option 1 to 6

1. I don´t trust the websites that sell fake products
2. It is not cool to have a fake product
3. The quality of an original product is better
4. I do not want to do anything illegal
5. I had a bad experience
6. I am afraid that my data could be misused
7. Other, please specify:

FILTER: IF III2 = 4

III7. You indicated that you don't know whether you have bought a fake product online during the past 12 months. Why is that? Please indicate all that apply.

DP: multiple, rotate option 1 to 2

1. Because I can't tell the difference between a genuine and a fake product
2. Because I don't care whether it is a genuine or a fake product
3. Other, please specify:

IV. Digital content

FILTER: IF at least one option II3a to II3h < 5

IV1. 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?

DP: gridline, single

FILTER: ONLY SHOW OPTIONS II3a to II3h < 5

	1	2	3
	Yes	No	For some websites I do and for others I don't
a) Films/series			
b) Music			
c) Games			
d) E-books			
e) E-newspapers and magazines			
f) TV shows and sport events			
g) Educational content			
h) Other			

FILTER: IF at least one option II3a to II3h < 5

IV2. During the past 12 months, have you used, played, downloaded or streamed content (for instance *[insert all answer categories indicated in II3 for which an answer <5 is selected]***) from illegal sources (websites)?**

DP: single

1. Yes
2. No
3. I don't know

FILTER: IF IV2 = 1

IV3. Did you use the illegal source(s) (website(s)) for content intentionally?

DP: single

1. Yes
2. No

DP: Add the following explanation on screen

"Intentionally means deliberately; you were aware that the source (website) you used for the content was illegal."

FILTER: IF IV3 = 1

IV3a. Did you use only illegal sources (websites)?

DP: single

1. Yes
2. No, I also used legal sources

FILTER: IF IV3 = 1

IV4. Which type of content did you use, play, download or stream intentionally from an illegal source (website)? Please indicate all that apply.

DP: multiple, do not rotate

1. Films/series
2. Music
3. Games
4. E-books
5. E-newspapers and magazines
6. TV shows and sport events
7. Educational content
8. Other

FILTER: IF IV3 = 1

IV5. You indicated that you used illegal sources (websites) intentionally for online content (for instance *[insert answer categories indicated in IV4]*) during the past 12 months. What was the reason for this? Please indicate all that apply.

DP: multiple, rotate option 1 to 14

1. Because people around me do this
2. Because the content is available quicker from illegal sources (websites)
3. Because illegal sources (websites) offer a larger choice

4. Because the search engine I use shows illegal sources (websites) on top of the list
5. Because content from illegal sources (websites) is free of charge or cheaper
6. Because I can re-use content from illegal sources (websites) on any device
7. Because content from illegal offers (websites) is much easier to find and access
8. Because I don't know why I should not do it
9. Because I only find the content that I want using illegal sources (websites)
10. Because it is for my personal use and I don't see anything wrong with it
11. Because I can use/access the content in another country
12. Because I can stream or download the content per item (e.g. one song and not the whole album or one episode and not the entire series)
13. Because I want to check the content first before I order it from a legal source (website)
14. Because I do not need to register
15. Other, please specify:

FILTER: IF IV3 = 1

IV6. You indicated that you used illegal sources (websites) intentionally for online content (for instance *[insert answer categories indicated in IV4]*) during the past 12 months. What would make you stop using illegal sources? Please indicate all that apply

DP: multiple, option 6 = single, rotate option 1 to 6

1. Risk of punishment
2. Personal bad experience with illegal sources
3. Bad experience of friends and/or family with illegal sources (e.g. malware...)
4. Bad experience of others with illegal sources (e.g. malware...)
5. Availability of affordable content from legal sources
6. A better understanding of the harm caused by my behaviour to the musicians/writers/artists/creators...
7. Nothing would make me stop [radio button]

FILTER: IF IV3 = 2

IV7. You indicated that you have not used illegal sources (websites) intentionally for online content (for instance *[insert all answer categories from II3 for which <5 is selected]*) during the past 12 months. What was the reason for this? Please indicate all that apply.

DP: multiple, rotate option 1 to 8

1. I don´t trust illegal sources
2. It is not cool to access, download or stream content from illegal sources
3. The quality of content from legal sources is better
4. I am afraid that my computer will be infected by viruses or spyware
5. I do not want to do anything illegal
6. I have had a bad experience with illegal sources
7. I am afraid that my data would be misused
8. I don´t want to hurt the artists/creators
9. Other, please specify:

FILTER: IF IV2 = 3

IV8. You indicated that you don't know whether you have used, played, downloaded or streamed content from illegal sources (websites) during the past 12 months. What was the reason for this?

DP: multiple, rotate option 1 to 2

1. Because I don't know whether sources of content are legal or illegal
2. Because I don't care whether the source of the content is legal or illegal
3. Other, please specify:

FILTER: IF at least one option II3a to II3h < 5 OR II1 < 17

IV9. How do you check if a source (website) that offers products or digital content online is legal or illegal? Please tick all that apply.

DP: multiple, option 7 = single, rotate option 1 to 5

1. I send an email if an email address is available
2. I ask my friends
3. I ask my parents/relatives
4. I search for reviews, comments and opinions about the site / source
5. I check who is the site/source owner, for example via 'Whois' domain name search
6. Other, please specify:
7. I don't check *(radio button)*

FILTER: IF at least one option II3a to II3h < 5 OR II1 < 17

IV10. What makes you think that a source (website) that offers products or digital content online is legal? Please tick all that apply.

DP: multiple, rotate option 1 to 7

1. Contact details of a seller (physical address and phone number) are available
2. Payment method with logos are displayed
3. Advertisements of major brands are present
4. People I know use this source (site)

5. The site appears high in the search results
6. Prices are indicated on the site
7. No bad reviews of the site can be found
8. Other, please specify:

ALL

IV11. 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?

DP: gridline, single

~~Option k = radio button~~

Knowing that:	Yes	Probably yes	Probably not	No	I don't know
a) Money spent on fake products goes to organised crime					
b) Your credit card details could be stolen					
c) Artists/creators and the team behind them can be hurt					
d) Fakes and piracy are not cool					
e) Illegal offers of content or products can cost the job of your friend/relative					
f) Fake products can be bad for the environment					
g) Fake products can be bad for your health or even dangerous					
h) You can risk a fine or another sanction					
i) When you buy a fake product which does not work properly you don´t have a guarantee					
j) You risk your computer or device becoming infected by viruses, or malware					
k) Nothing would make me think twice	○				

V. Experiences

FILTER: IF at least one option II3a to II3h < 5

V1. Did the following already happen to you when you used, played, downloaded or streamed content online such as: *[insert answer categories indicated < 5 in II3]*?

	1 . No	Legality of source (website)?		
		2. Yes, and I think the source (website) was legal	3. Yes, and I think the source (website) was illegal	4. Yes, and I don't know whether the source (website) was legal or not
a) I paid for a service/content which did not work	☐	☐	☐	☐
b) The content was not accessible in another country	☐	☐	☐	☐
c) I paid for content but could not resell it	☐	☐	☐	☐
d) I made a complaint but was not refunded by the website/service owner	☐	☐	☐	☐
e) I was fully satisfied	☐	☐	☐	☐
f) My credit card details were stolen	☐	☐	☐	☐
g) My computer was infected by viruses or by malware	☐	☐	☐	☐
h) I got spammed because my details were given away	☐	☐	☐	☐
i) I wanted to purchase content but was unable to make the transaction	☐	☐	☐	☐
j) The content I got was not portable (could not be used on other devices)	☐	☐	☐	☐

DP: gridline, single

FILTER: IF II1< 17

V2. Has the following happened to you when you bought a product online, such as *[insert answer categories indicated in II1]*?

DP: gridline, single

	1 . No	2. Yes, and I think the source (website) was legal	3. Yes, and I think the source (website) was illegal	4. Yes, and I don't know whether the source (website) was legal or not
a) I paid, but it did not arrive	☐	☐	☐	☐
b) The product arrived much later than indicated	☐	☐	☐	☐
c) The product was stopped by customs *Customs is the official department that administers and collects the duties/taxes raised by a government on goods that are imported.*	☐	☐	☐	☐
d) The product was a fake	☐		☐	
e) The product was of lower quality than I expected	☐	☐	☐	☐
f) I could not return the product	☐	☐	☐	☐
g) I was fully satisfied	☐	☐	☐	☐
h) I returned the product but the money was not refunded by the seller	☐	☐	☐	☐
i) I could not make a complaint to the seller	☐	☐	☐	☐
j) The product broke and I could not get it fixed on a warranty	☐	☐	☐	☐
k) The product delivered was not the product that I ordered	☐	☐	☐	☐

X. Background

ALL

X1. What is your gender?

1. Male
2. Female

ALL

X2. What is your current situation?

1. I am a full-time student
2. I am part-time student and part-time employed/doing an internship
3. I have left education and am employed
4. I have left education and am not employed
5. Other, please specify:

FILTER: If X2 = 3 or 4

X3A. What is the highest level of education you completed?

Per country the local education levels will be used in the questionnaire, and the local levels will be automatically recoded to the six levels of the international ISCED classification system.

ISCED levels:

No education completed (ISCED 0)
Primary education (ISCED 1)
Lower secondary education (ISCED 2)
Upper secondary education (ISCED 3)
Post-secondary including pre-vocational or vocational education but not tertiary (ISCED 4)
Tertiary education – first level (ISCED 5)
Tertiary education – advanced level (ISCED 6)

Example for Sweden:

Educational category labels in Swedish	*Educational category labels in English*	*ISCED level*
1. Ingen formell utbildning	*No formal education*	*0*
2. Folkskola (6 år)	*Elementary school*	*1*
3. Realskola, Fackskola eller flickskola	*Secondary school*	*2*
4. Grundskola (9 år)	*Nine-year compulsory school*	*2*

5. Gymnasium, Studentexamen	*Upper secondary school*	*3*
6. Påbyggnadsutbildning efter gymnasium ej högskola/universitet (t.ex. Kvalificerad yrkesutbildning)	*Vocational school*	*3*
7. vårdhögskola, socialhögskola (äldre utbildning)	*College of health sciences*	*3*
8. Universitet och högskola	*University, college of higher learning*	*5*
9. Universitet och högskola, magister-/mastersexamen, civilingenjör eller liknande längre utbildning	*University, college of higher learning. master's degree*	*5*
10. Forskarutbildning (licentiat eller doktorsexamen)	*Research study, post-graduate study*	*6*

FILTER: IF X2 = 1 or 2

X3B. Which level of education are you currently undertaking?

Per country the local education levels will be used in the questionnaire, and the local levels will be automatically recoded to the international ISCED classification system.

ISCED levels:
No education completed (ISCED 0)
Primary education (ISCED 1)
Lower secondary education (ISCED 2)
Upper secondary education (ISCED 3)
Post-secondary including pre-vocational or vocational education but not tertiary (ISCED 4)
Tertiary education – first level (ISCED 5)
Tertiary education – advanced level (ISCED 6)
See example above

ALL

X4. To what extent do you agree or disagree with the following statements?
DP: gridline

	Strongly disagree	Tend to disagree	Tend to agree	Agree	Strongly agree
a) I use a wide variety of sites on the Internet					
b) I know how to search on the Internet to find what I need					
c) I know how to pay online					

FILTER: IF X2 < 3 or X2 = 5

X5A. Do you have an income?

DP: single

1. Yes, I combine school/studies with a student job
2. Yes, I have another type of income
3. No, I do not have an income

FILTER: IF X2 = 4

X5B. Do you have an income?

DP: single

1. Yes, I receive an allowance/benefits
2. Yes, I have another type of income
3. No, I do not have an income

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9. Appendix 4: Country profiles

Intellectual Property and Youth

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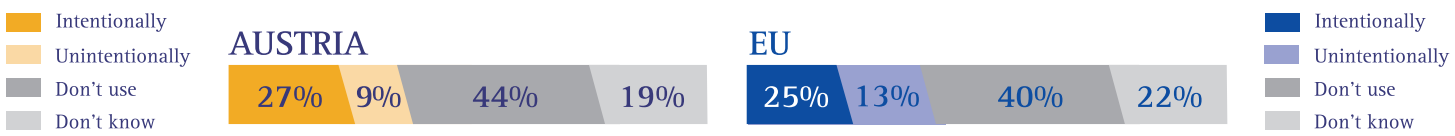
AUSTRIA

- Youth IP perception and online behaviour -

DIGITAL CONTENT

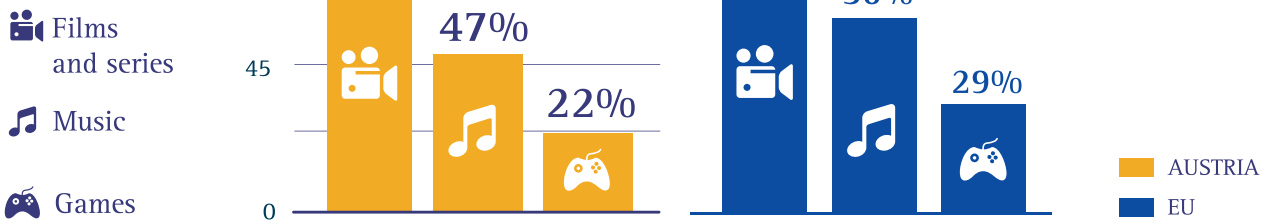
CONTENT

Usage of illegal sources



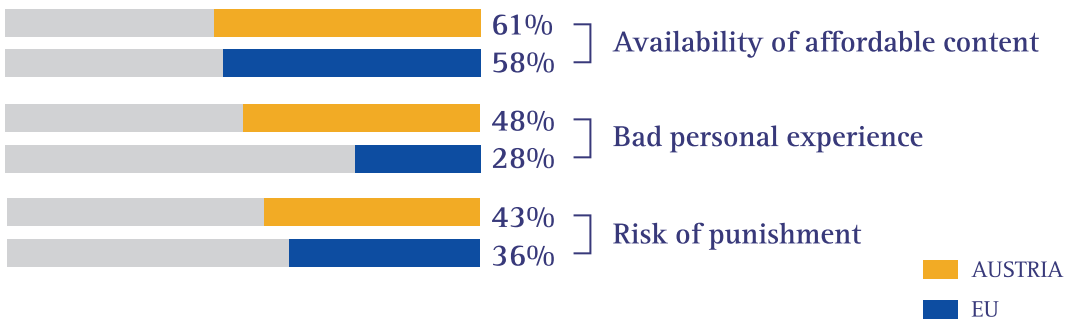
Main digital content accessed from illegal sources

ONLINE



Main reasons to choose illegal sources

Reasons to stop using illegal sources



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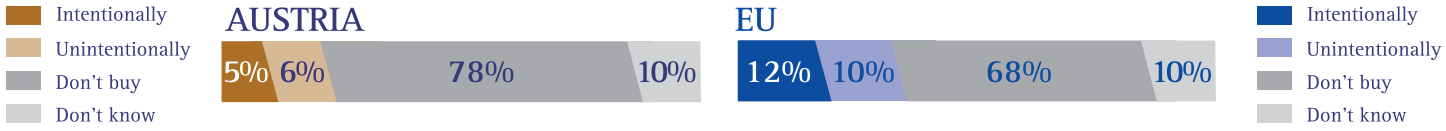
AUSTRIA

PHYSICAL GOODS

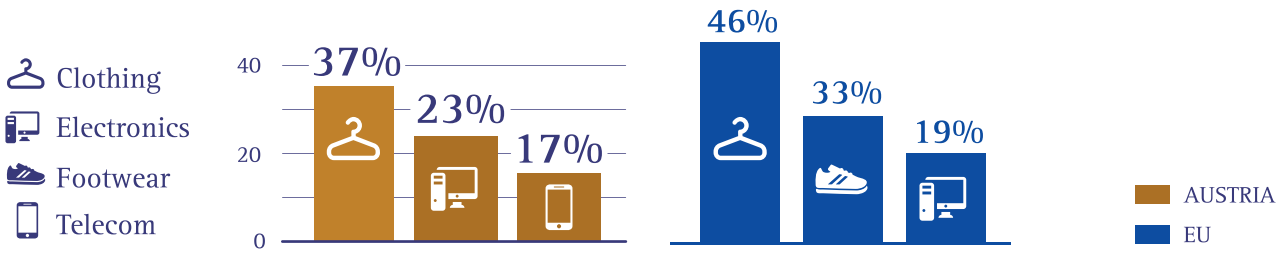
GOODS

PHYSICAL

Bought counterfeit goods online



Main counterfeit goods purchased online



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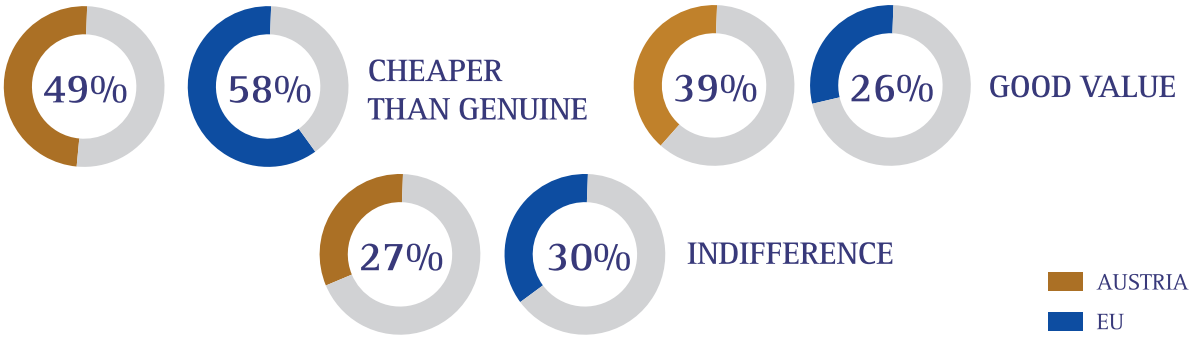
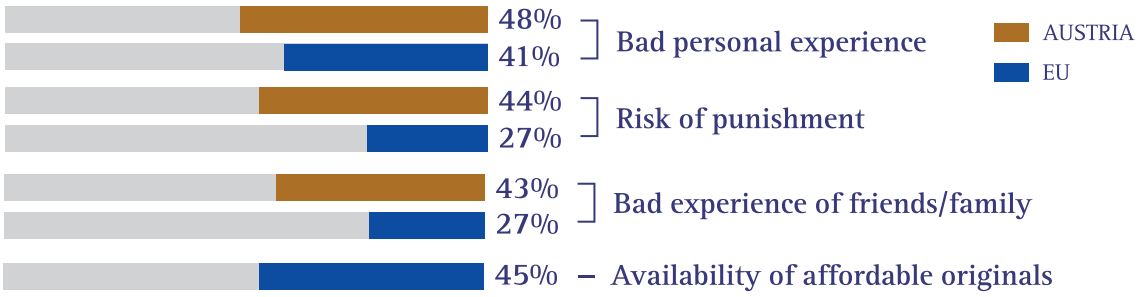
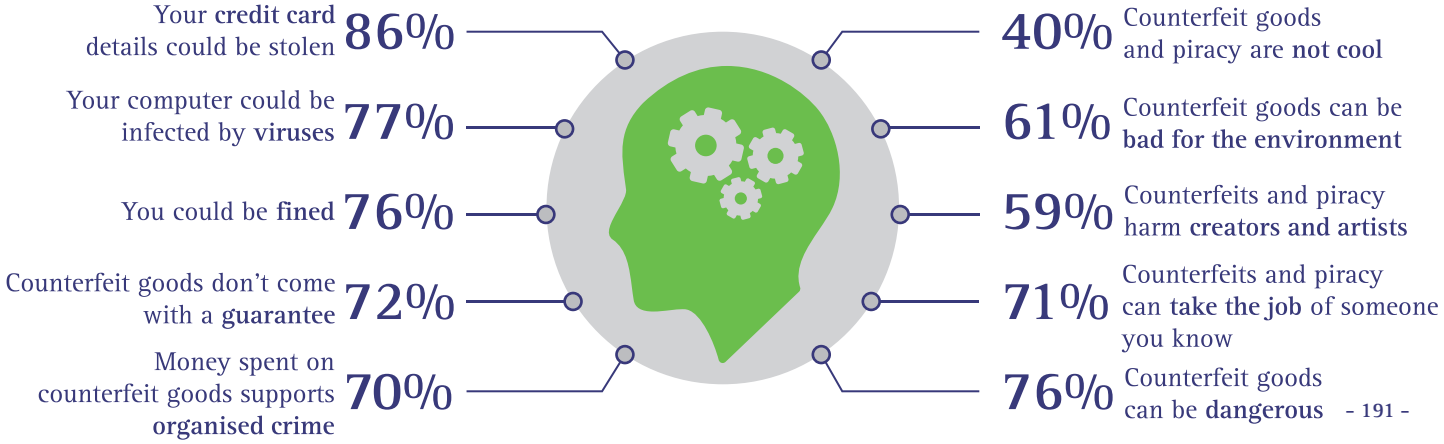


Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



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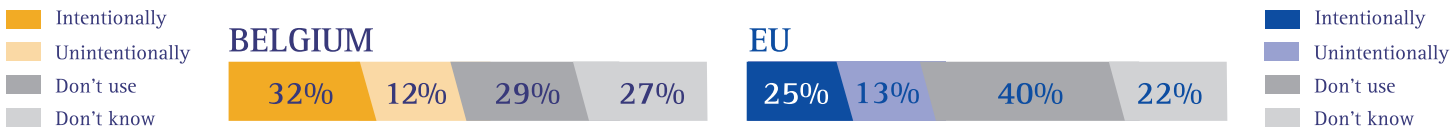
BELGIUM

- Youth IP perception and online behaviour -

DIGITAL CONTENT

CONTENT

Usage of illegal sources



ONLINE

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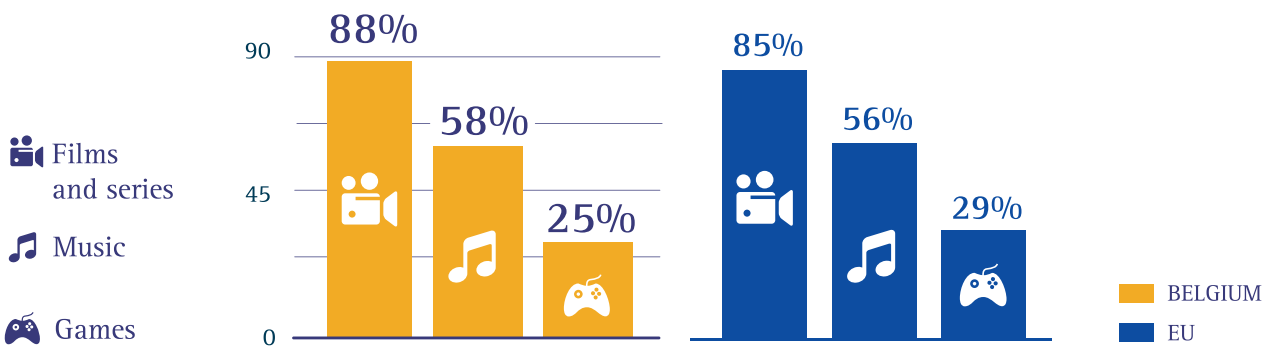
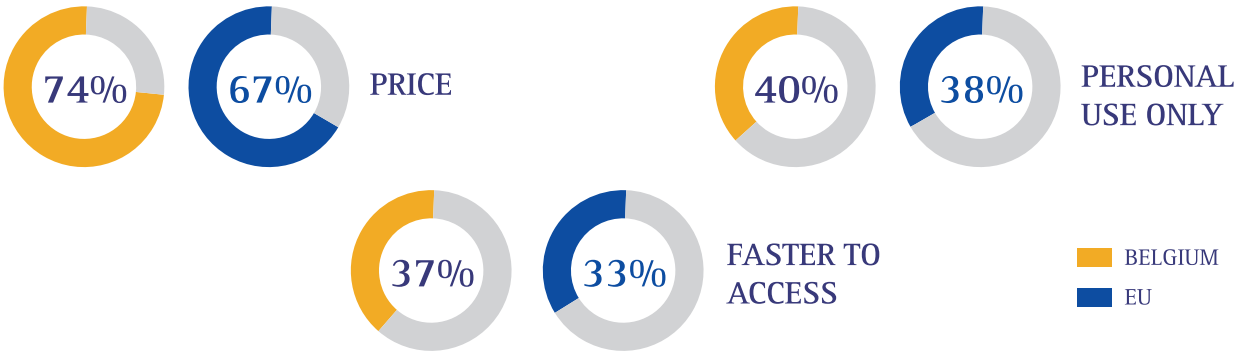
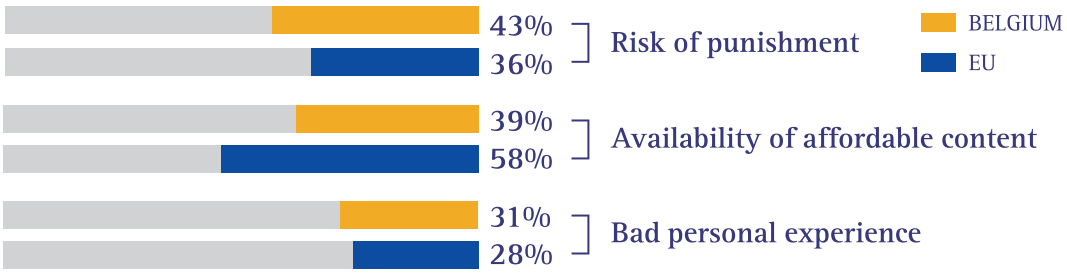


Main reasons to choose illegal sources



Reasons to stop using illegal sources



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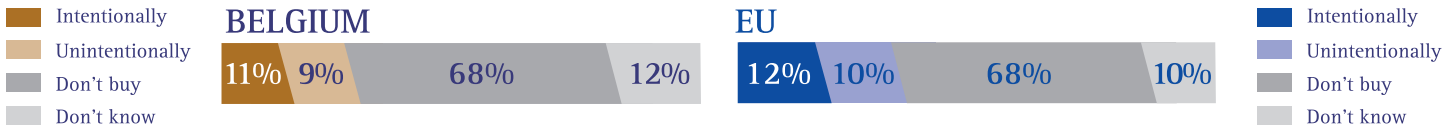
BELGIUM

PHYSICAL GOODS

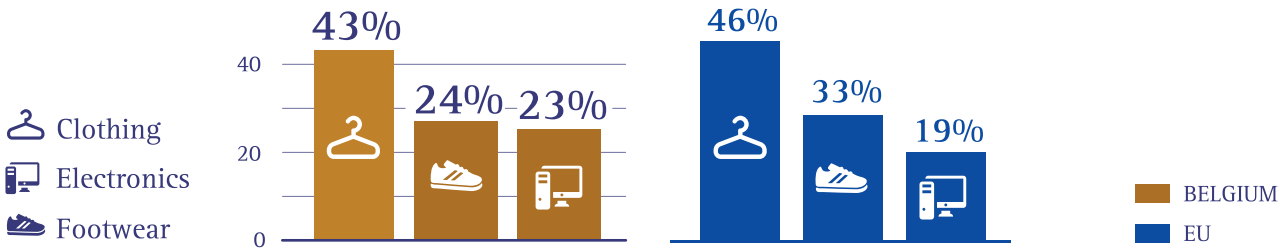
GOODS

PHYSICAL

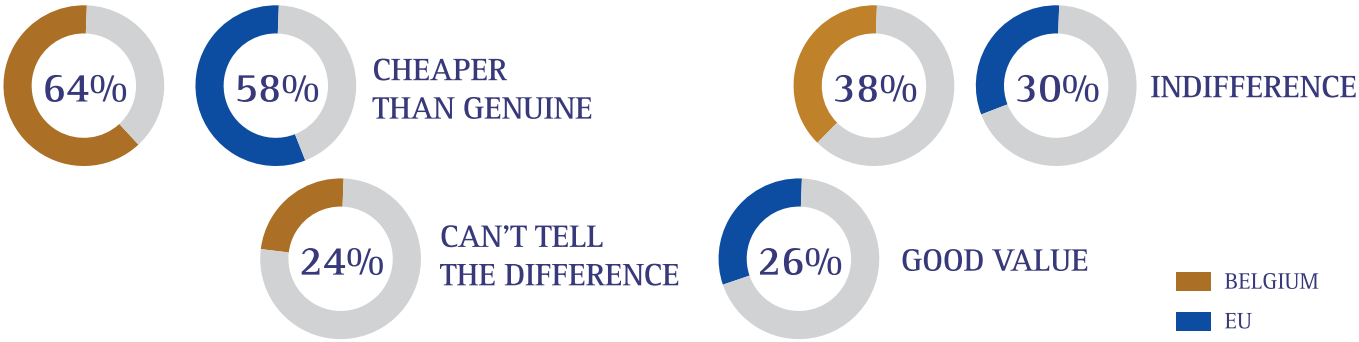
Bought counterfeit goods online



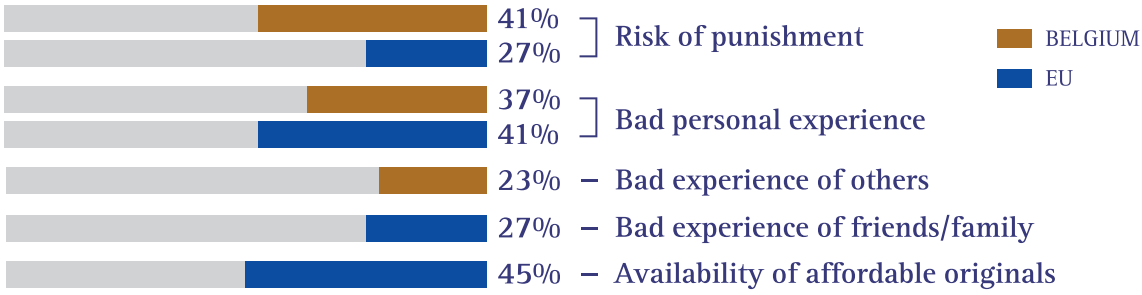
Main counterfeit goods purchased online



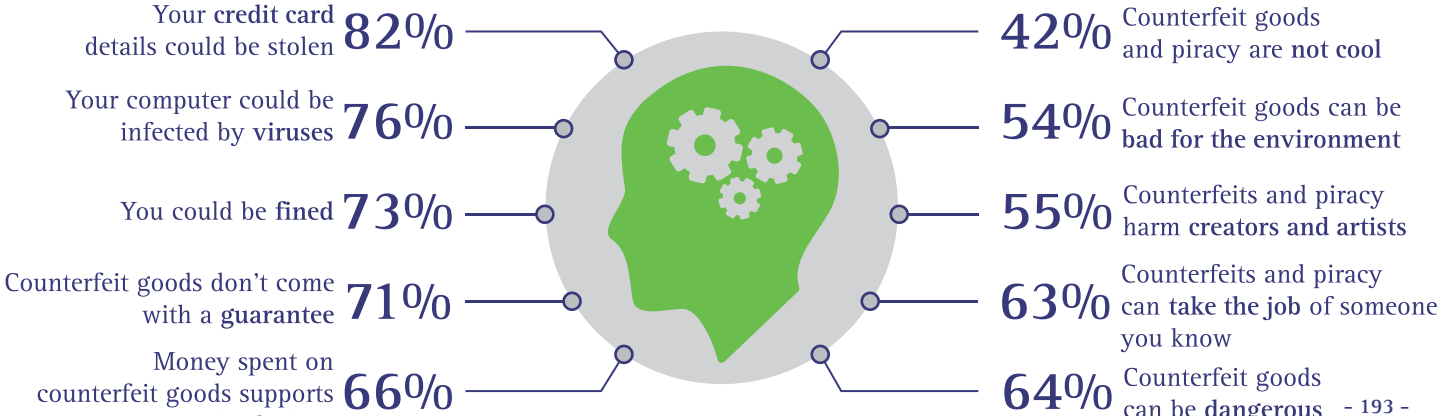
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



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BULGARIA

- Youth IP perception and online behaviour -

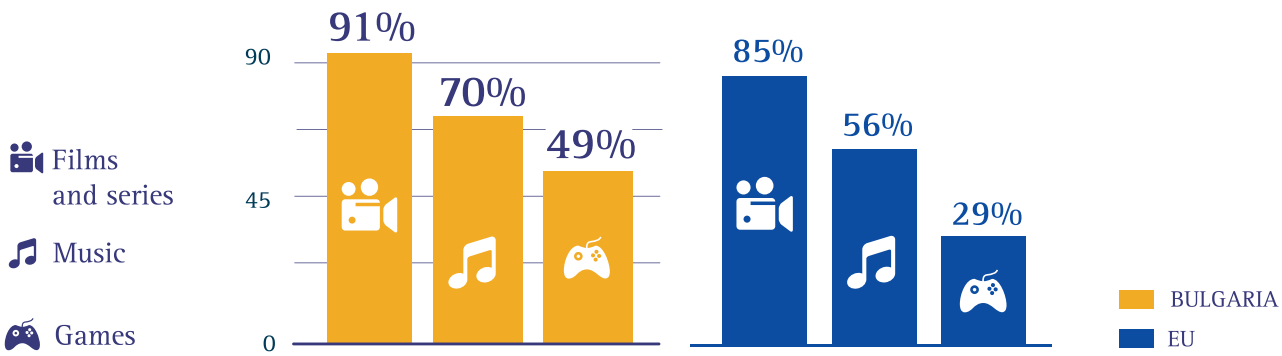
DIGITAL CONTENT

CONTENT

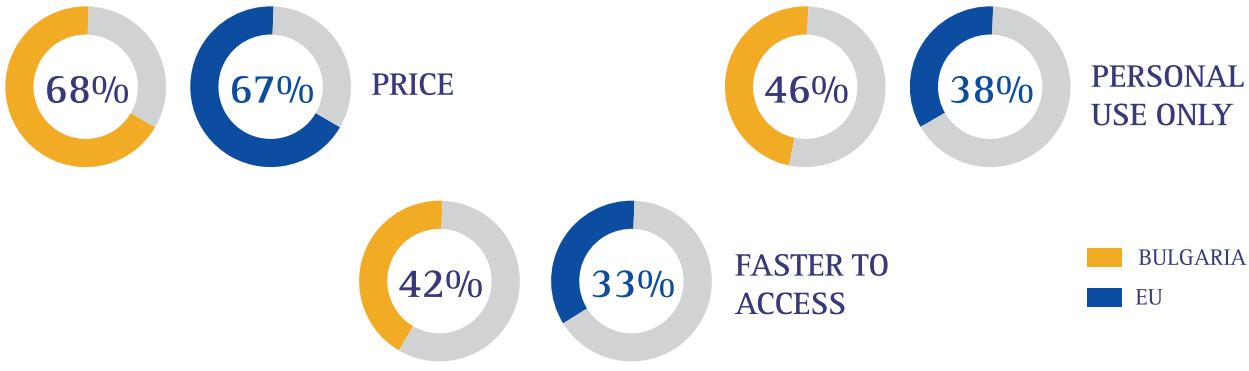
ONLINE

Usage of illegal sources

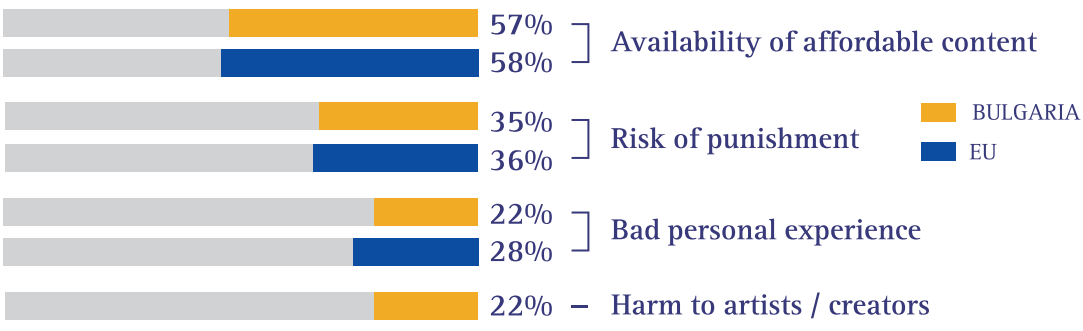
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



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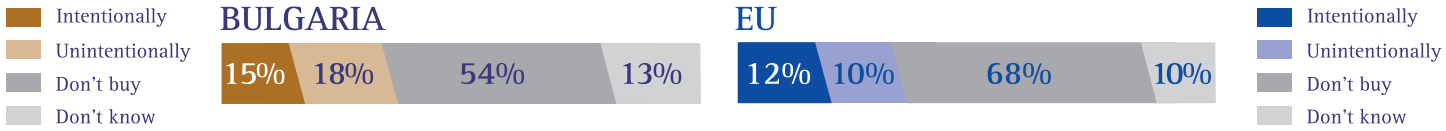
BULGARIA

PHYSICAL GOODS

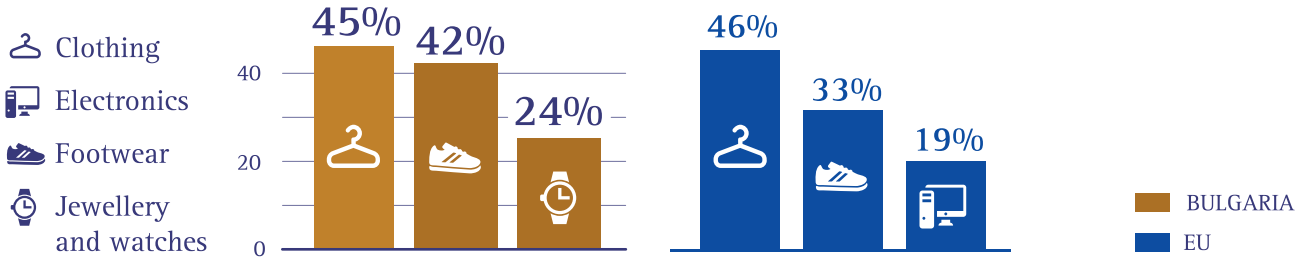
GOODS

PHYSICAL

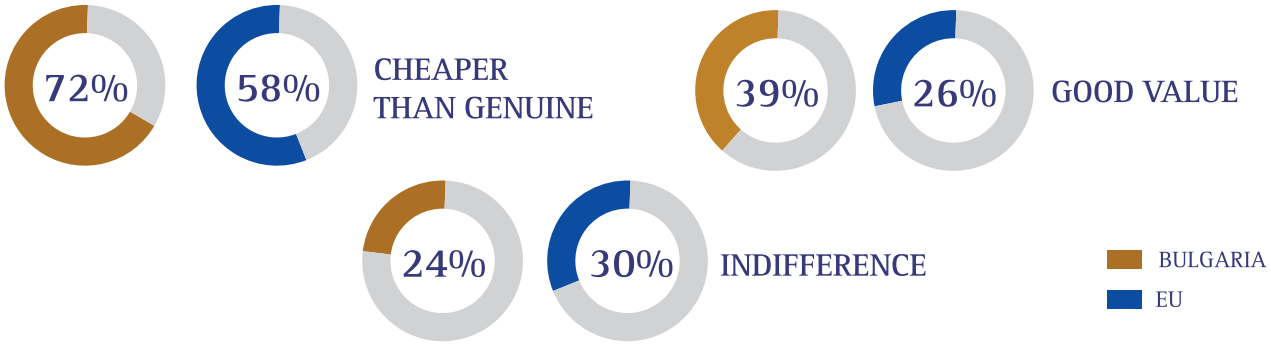
Bought counterfeit goods online



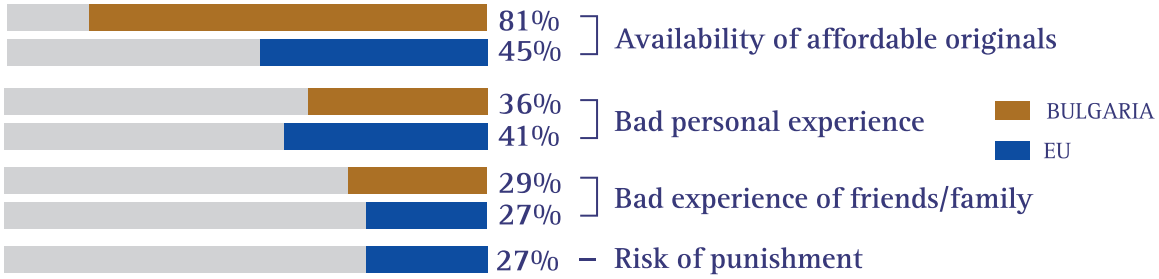
Main counterfeit goods purchased online



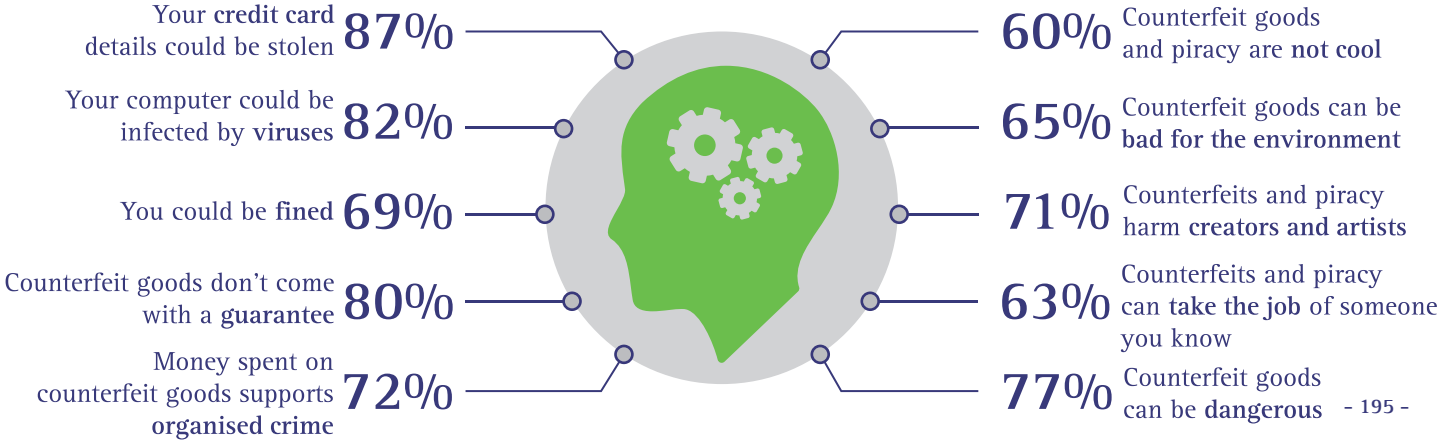
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



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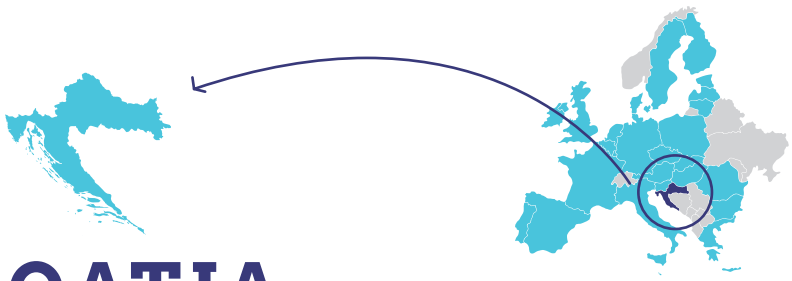


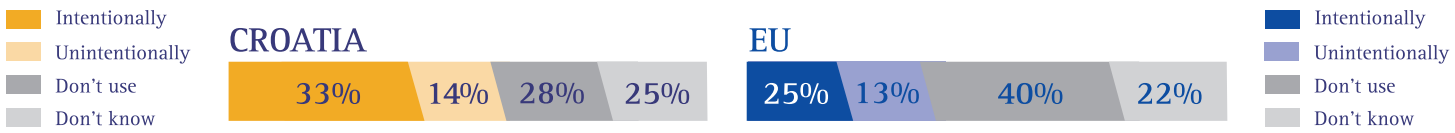
CROATIA

- Youth IP perception and online behaviour -

DIGITAL CONTENT

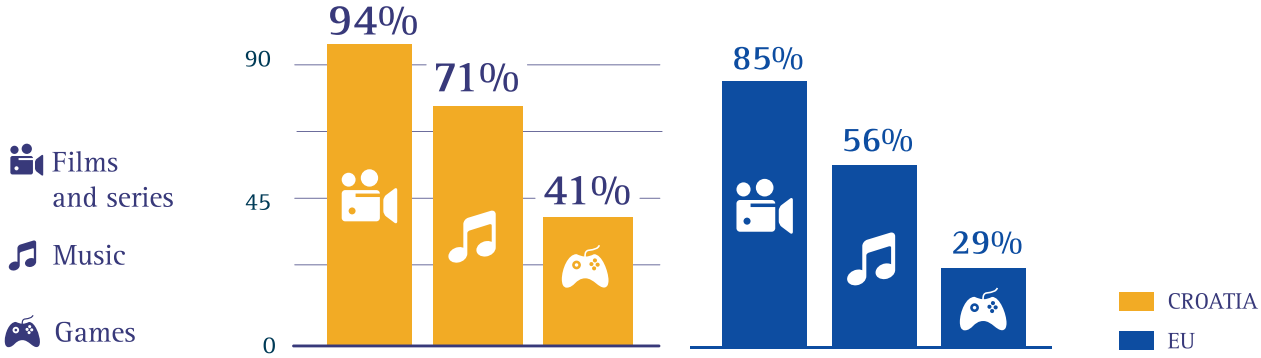
CONTENT

Usage of illegal sources



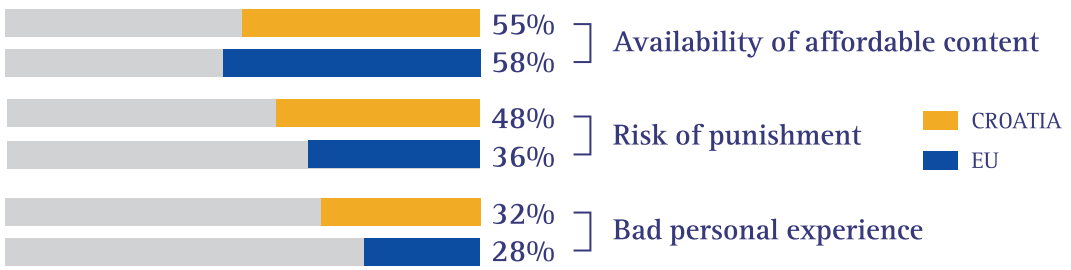
Main digital content accessed from illegal sources

ONLINE



Main reasons to choose illegal sources

Reasons to stop using illegal sources



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EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

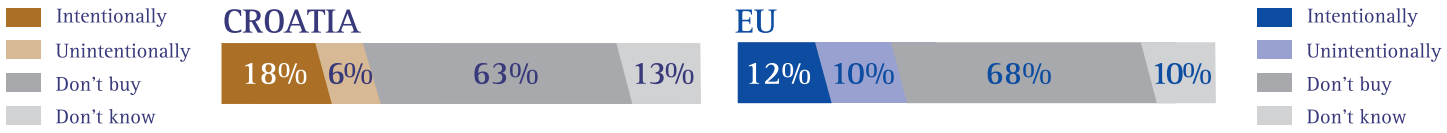
CROATIA

PHYSICAL GOODS

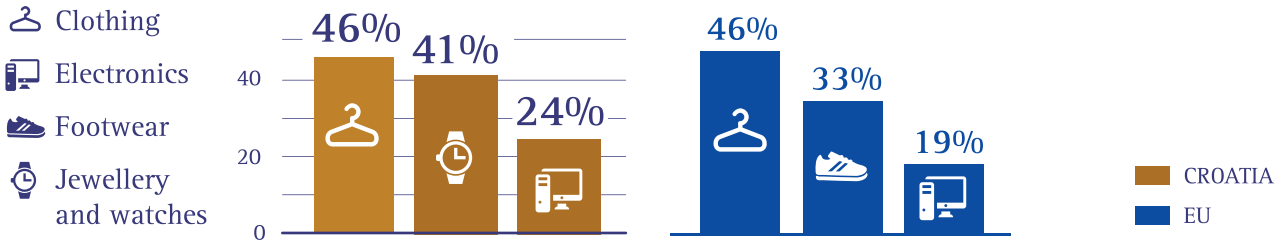
GOODS

PHYSICAL

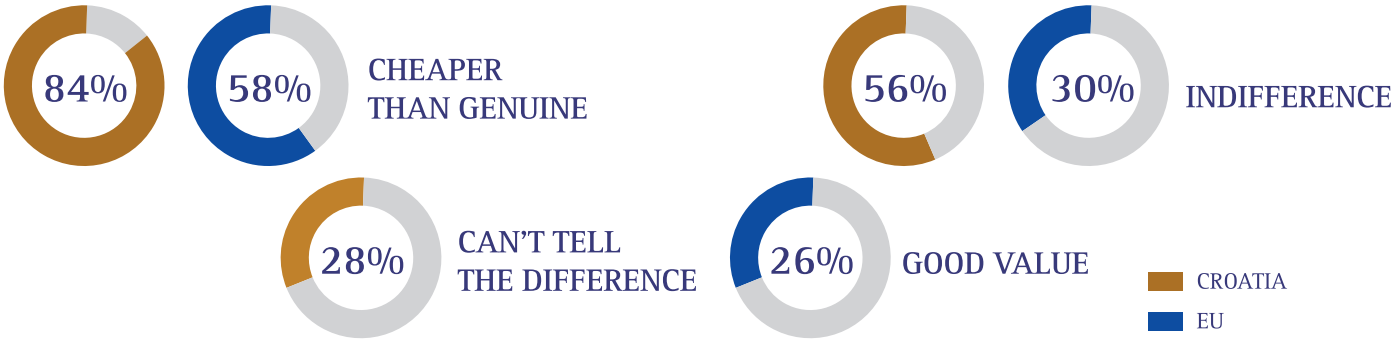
Bought counterfeit goods online



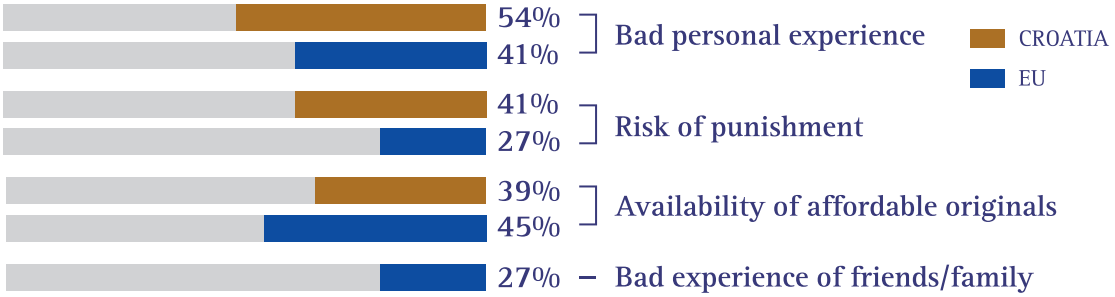
Main counterfeit goods purchased online



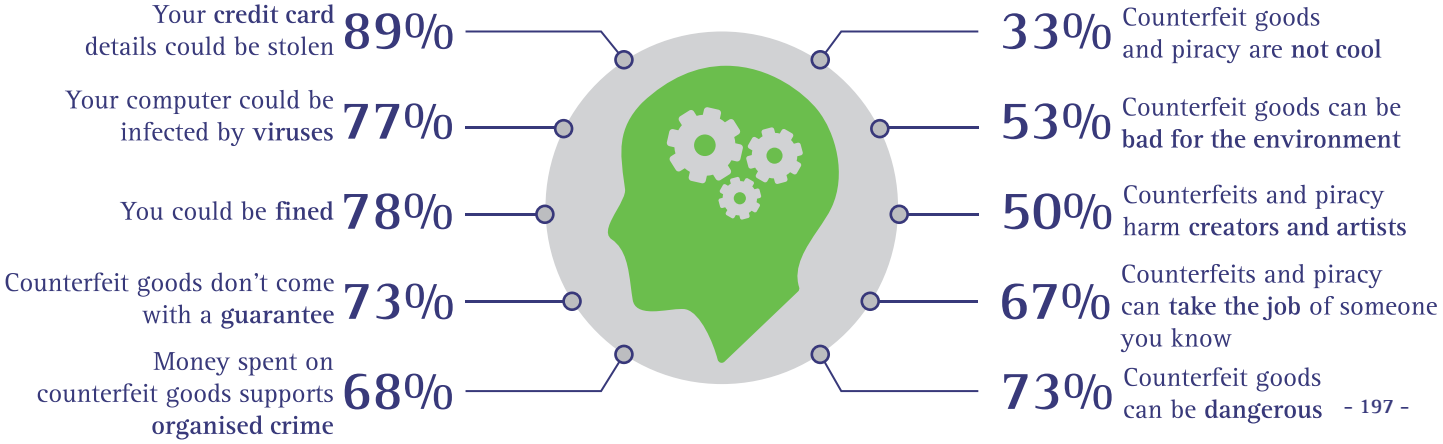
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

CYPRUS

- Youth IP perception and online behaviour -

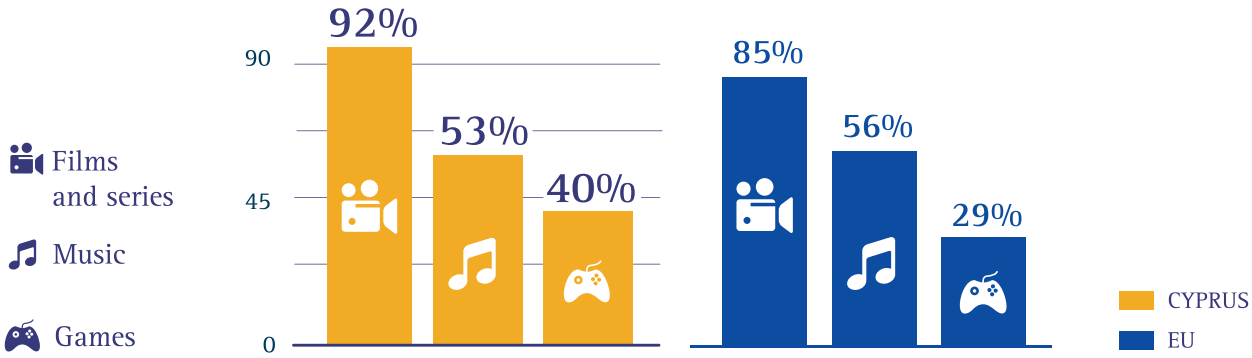
DIGITAL CONTENT

CONTENT

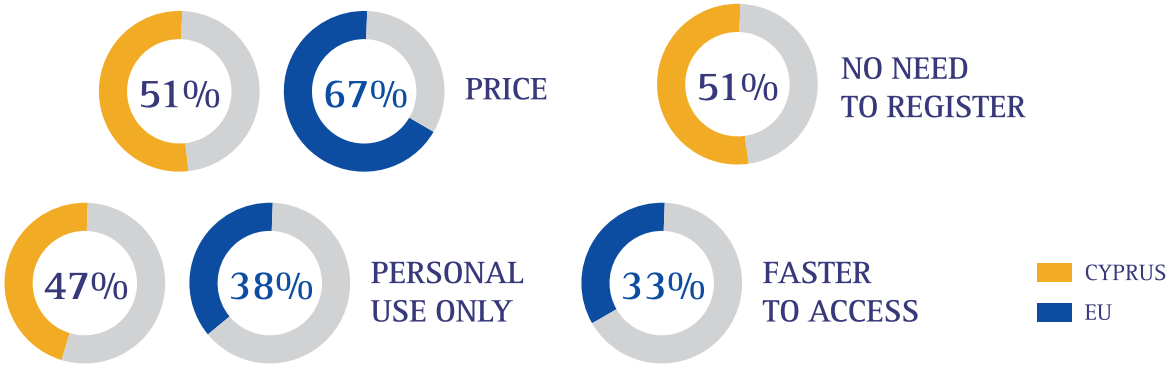
Usage of illegal sources

ONLINE

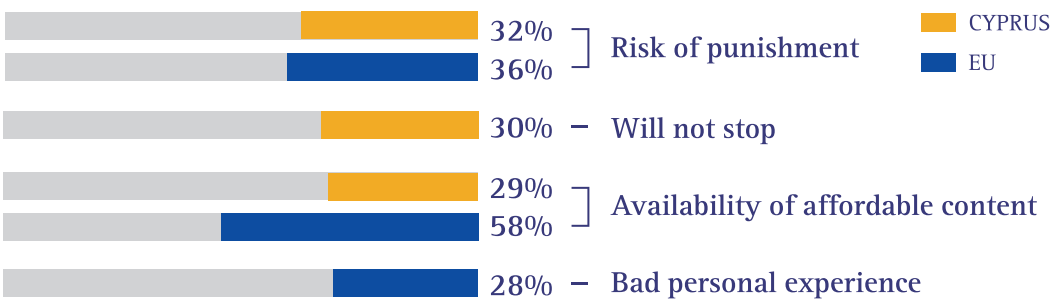
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



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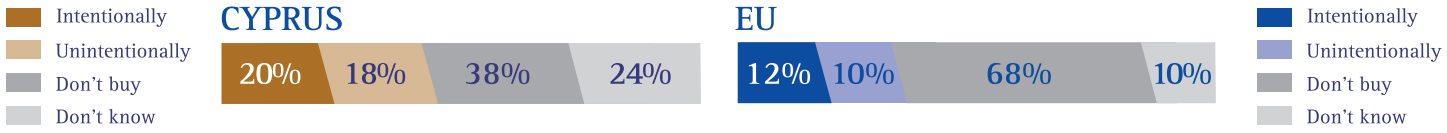
CYPRUS

PHYSICAL GOODS

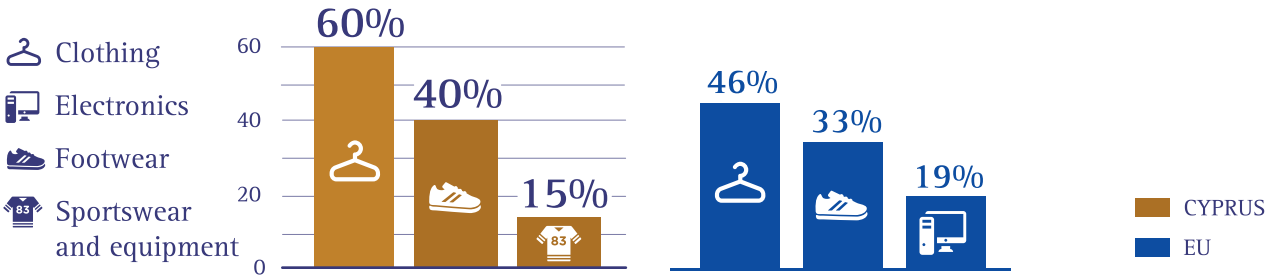
GOODS

PHYSICAL

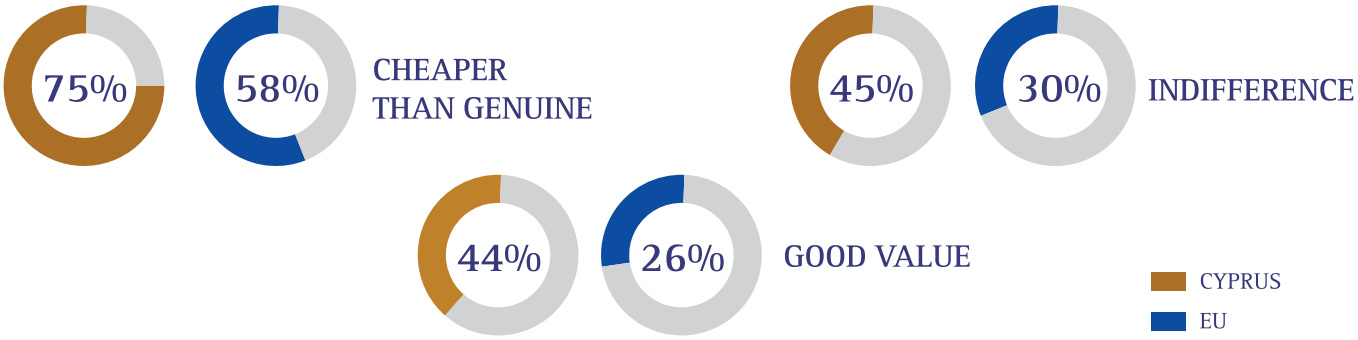
Bought counterfeit goods online



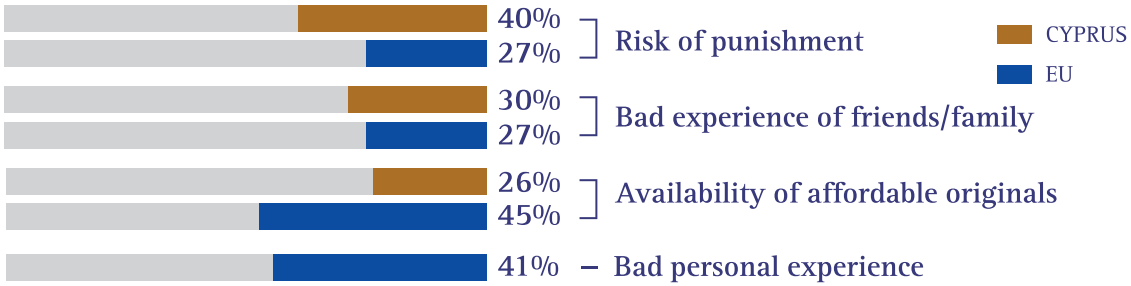
Main counterfeit goods purchased online



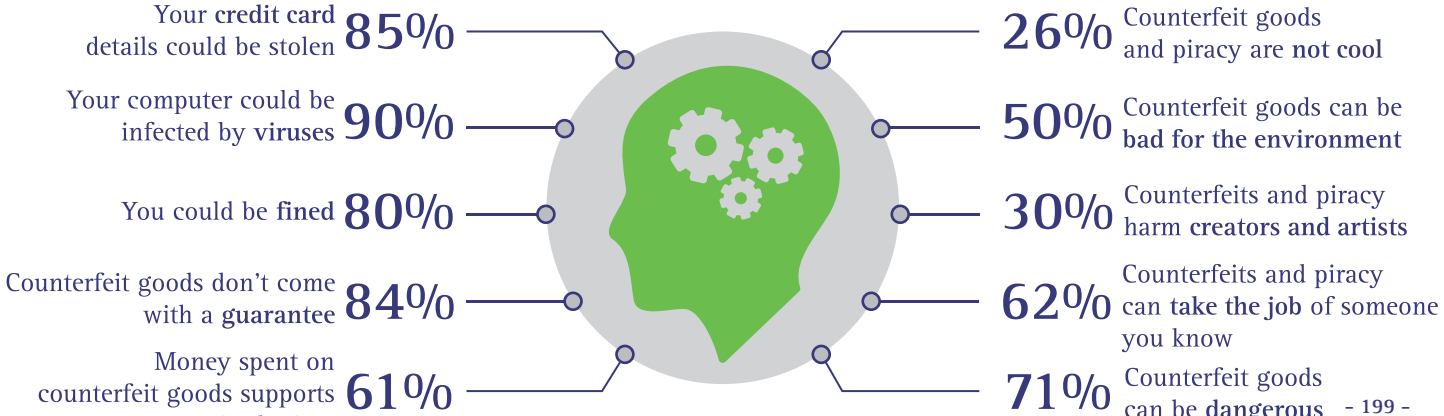
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

CZECH REPUBLIC

- Youth IP perception and online behaviour -

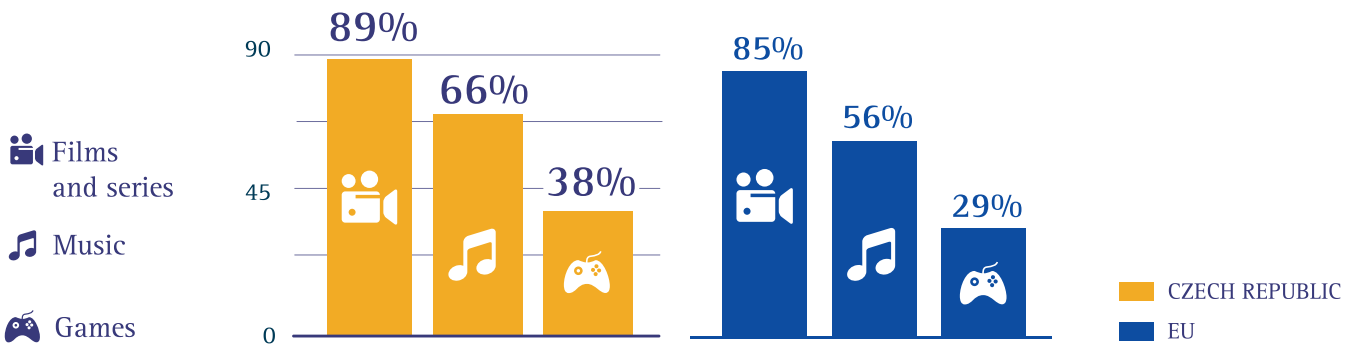
DIGITAL CONTENT

CONTENT

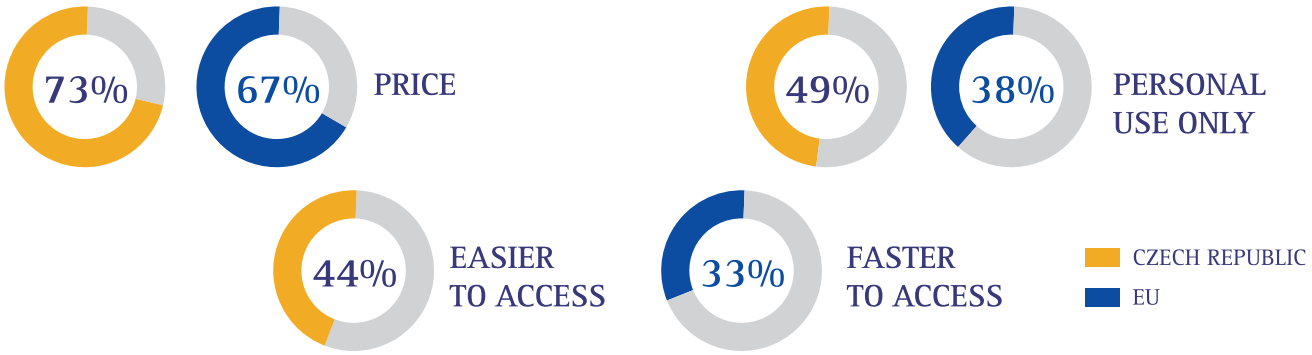
Usage of illegal sources

Main digital content accessed from illegal sources

ONLINE



Main reasons to choose illegal sources



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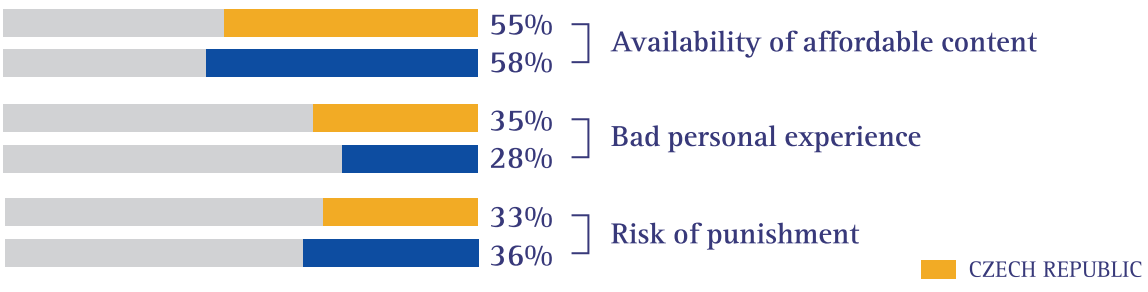


EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

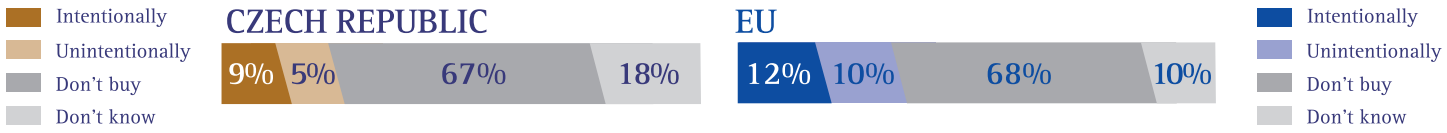
CZECH REPUBLIC

PHYSICAL GOODS

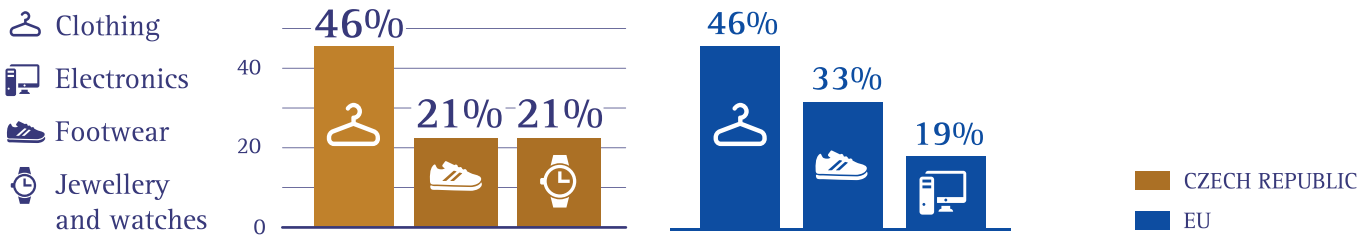
GOODS

PHYSICAL

Bought counterfeit goods online



Main counterfeit goods purchased online



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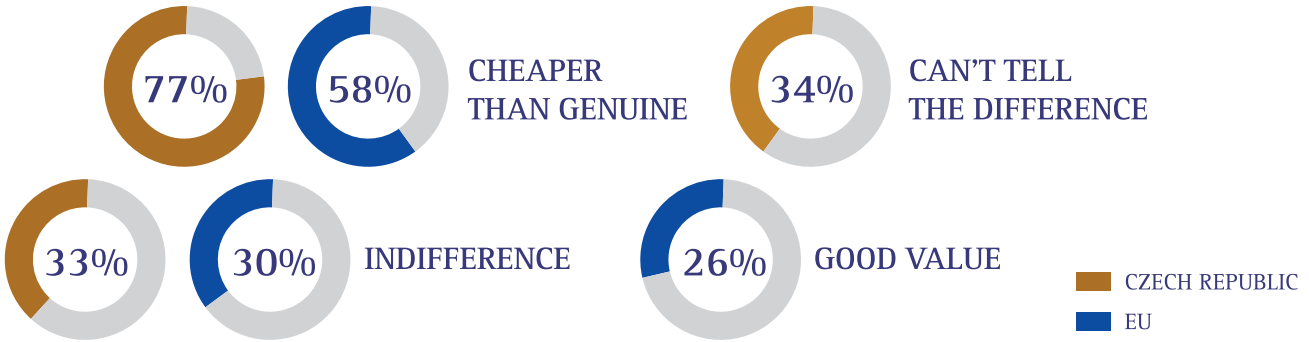
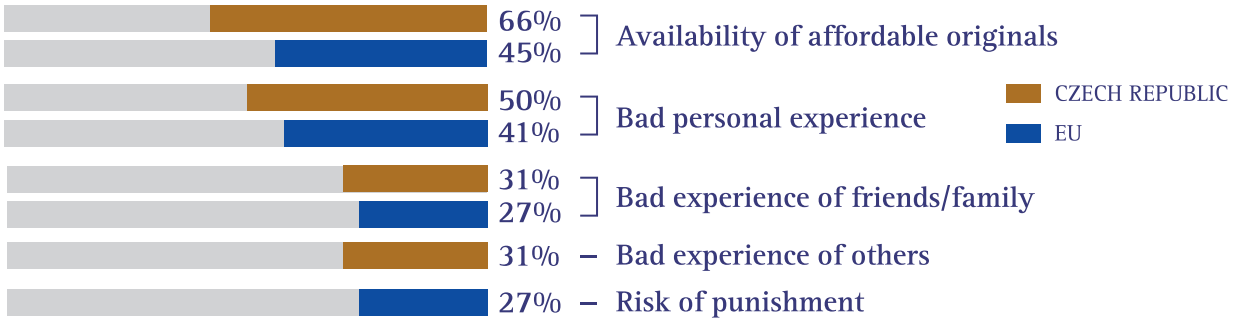
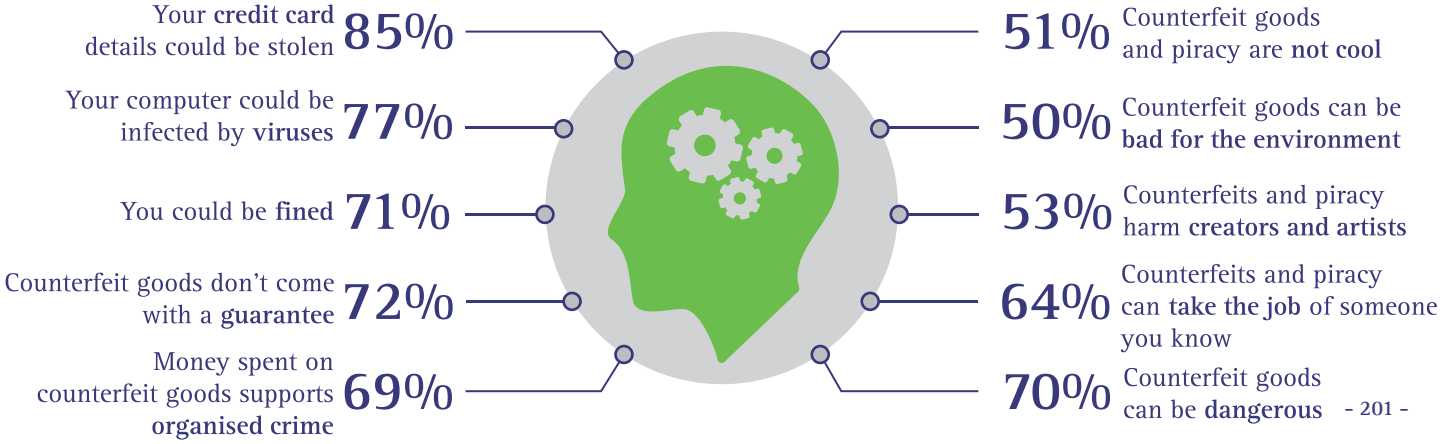


Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

DENMARK

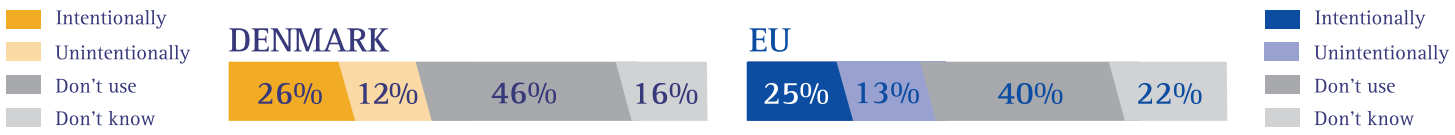
- Youth IP perception and online behaviour -

DIGITAL CONTENT

CONTENT

ONLINE

Usage of illegal sources



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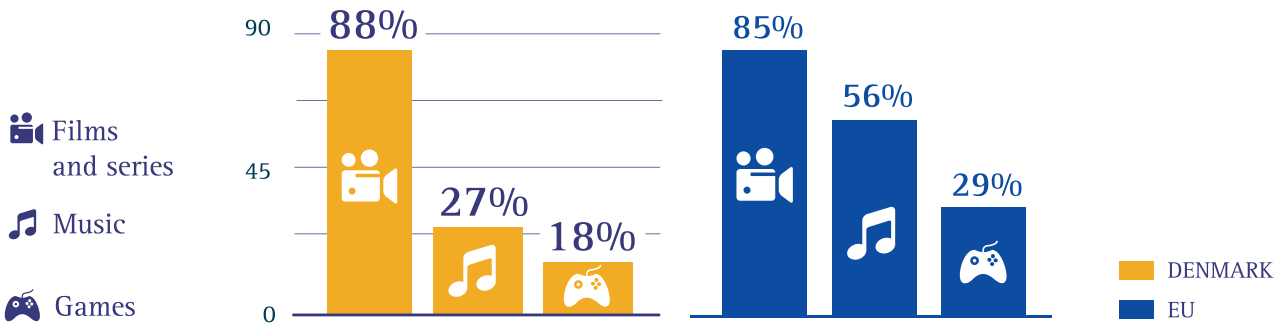
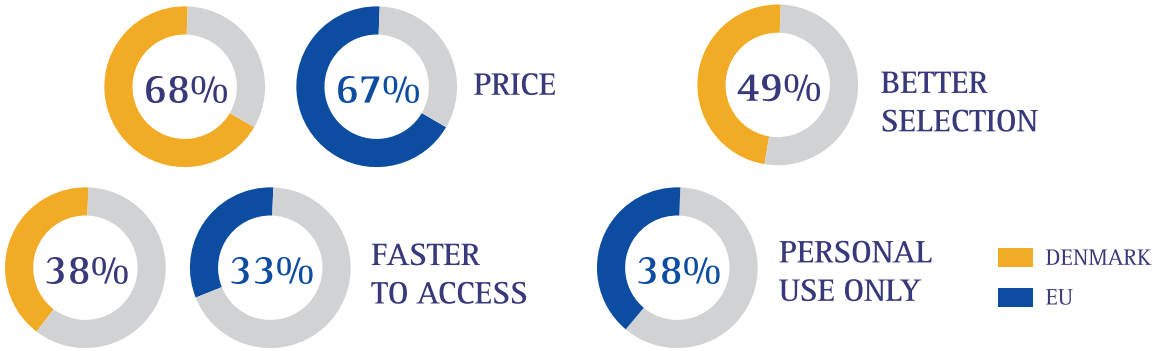
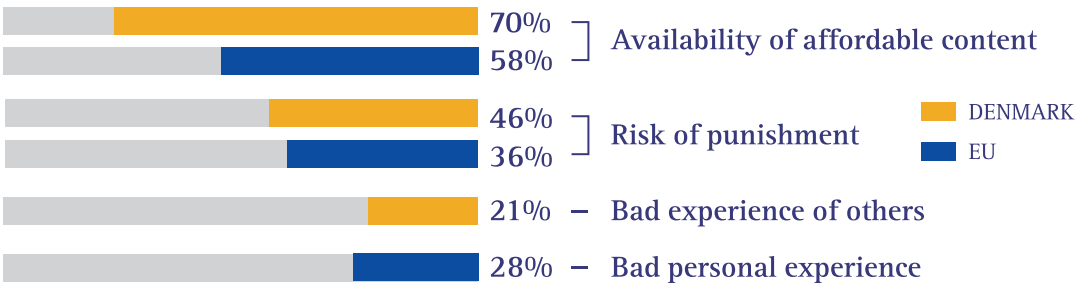


Main reasons to choose illegal sources



Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

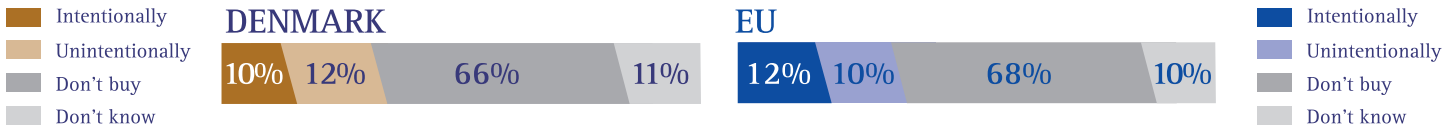
DENMARK

PHYSICAL GOODS

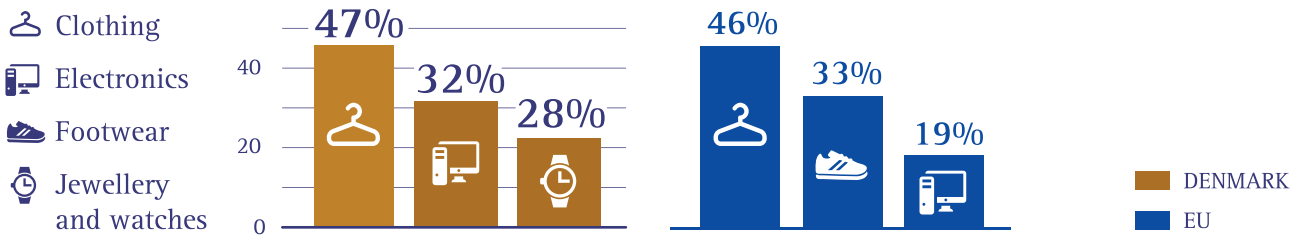
GOODS

PHYSICAL

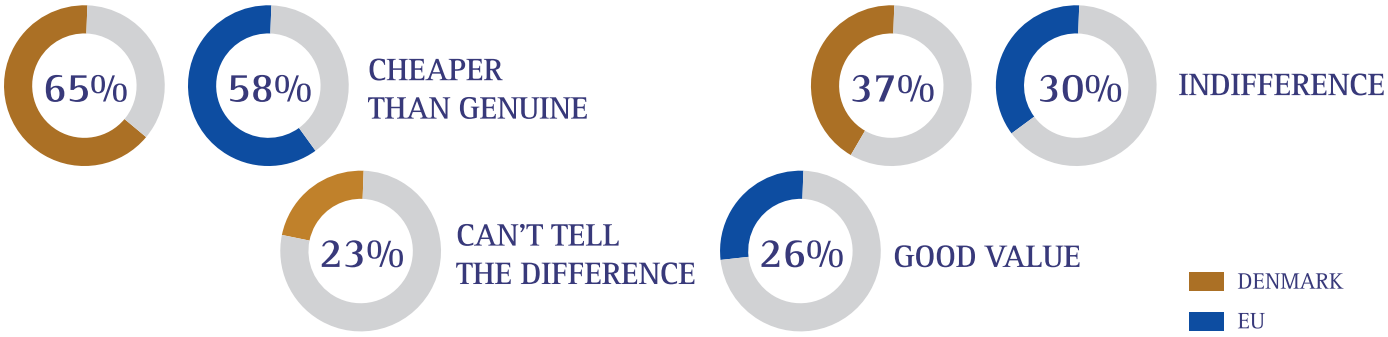
Bought counterfeit goods online



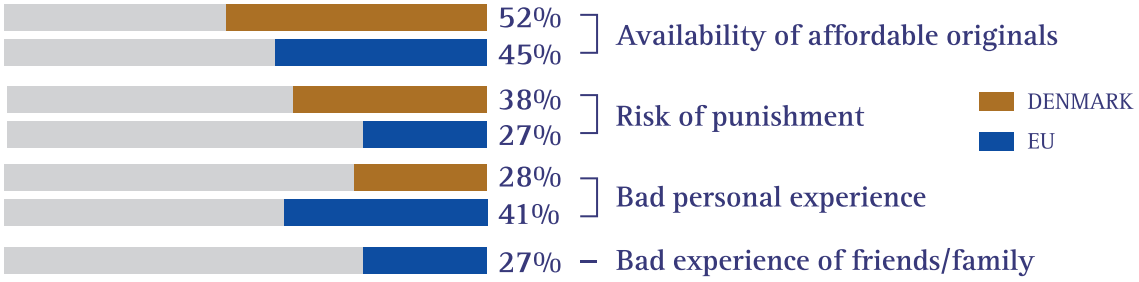
Main counterfeit goods purchased online



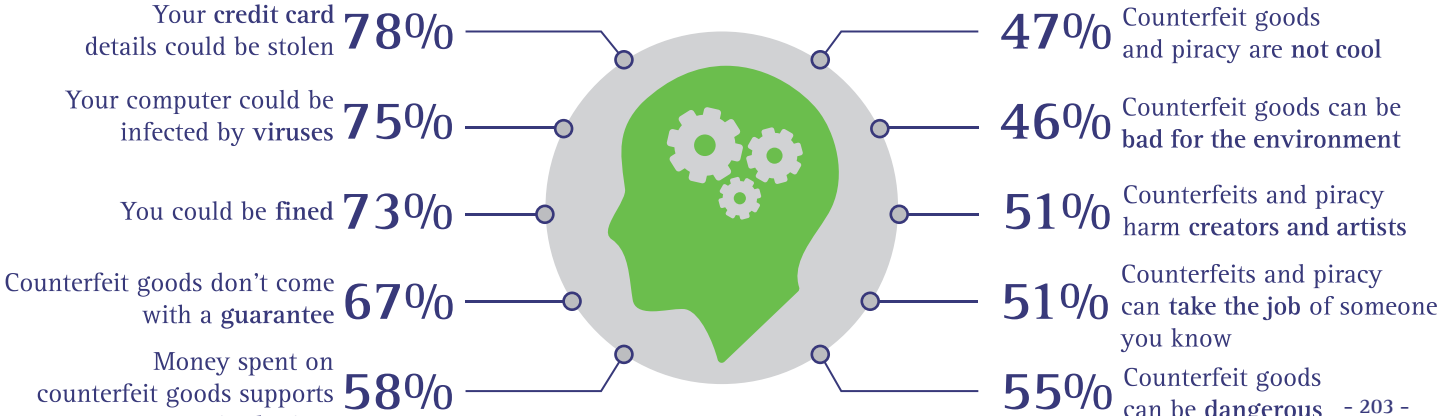
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

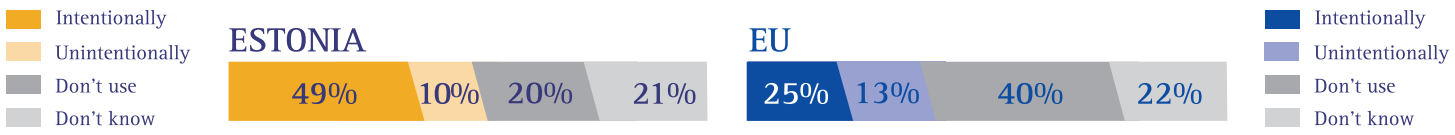
ESTONIA

- Youth IP perception and online behaviour -

DIGITAL CONTENT

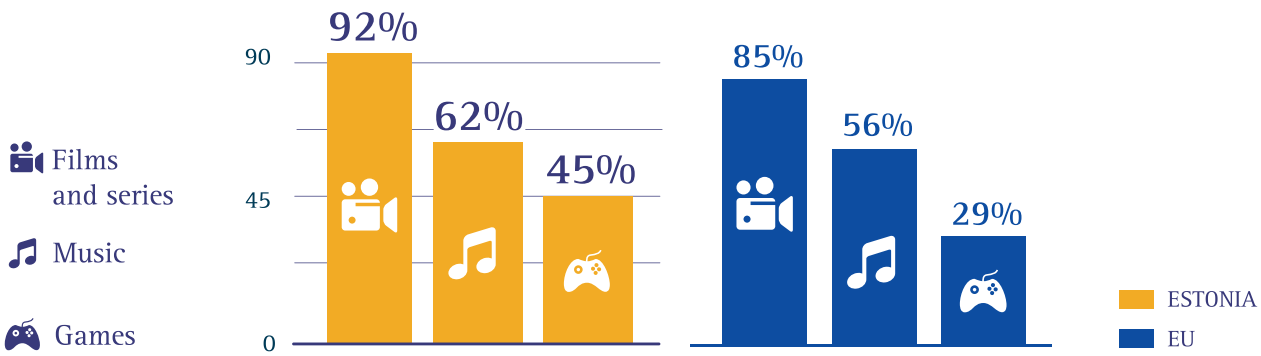
CONTENT

Usage of illegal sources

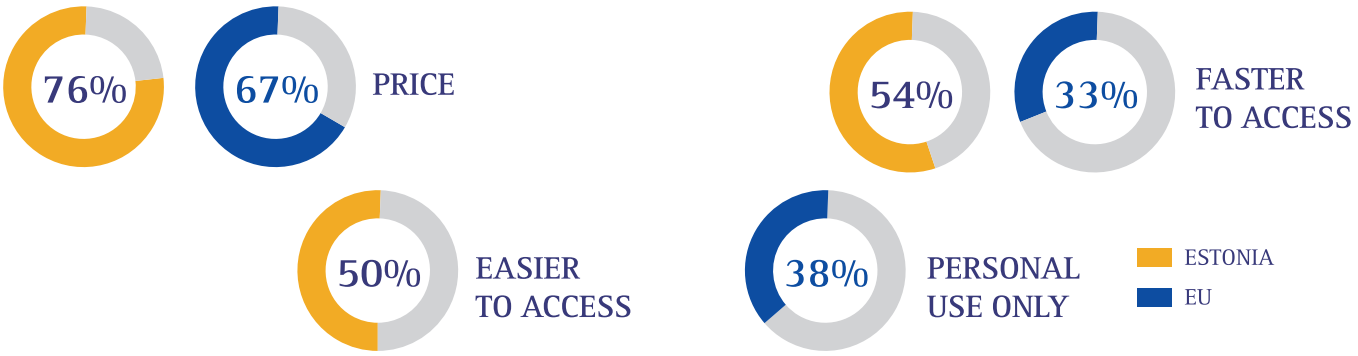


Main digital content accessed from illegal sources

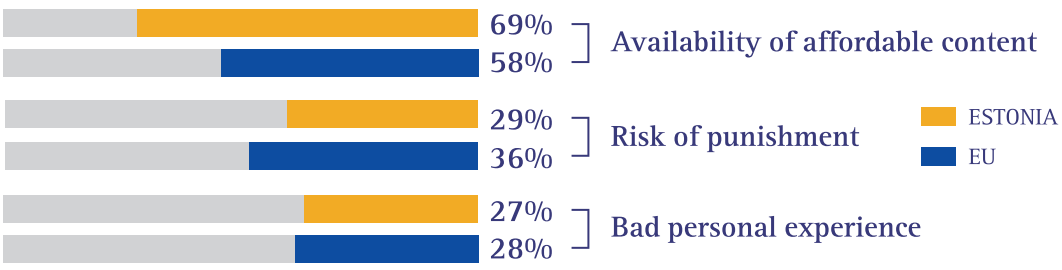
ONLINE



Main reasons to choose illegal sources



Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

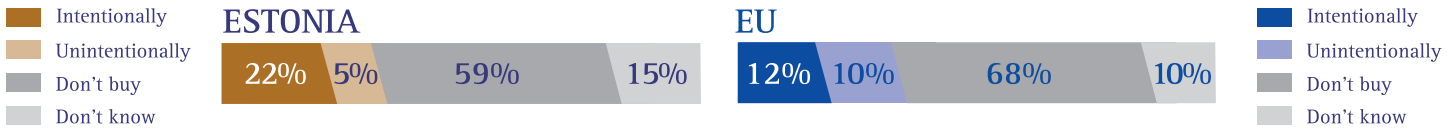
ESTONIA

PHYSICAL GOODS

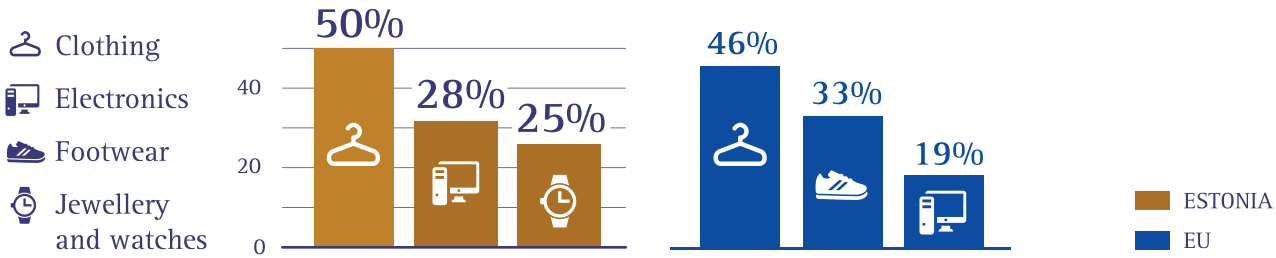
GOODS

PHYSICAL

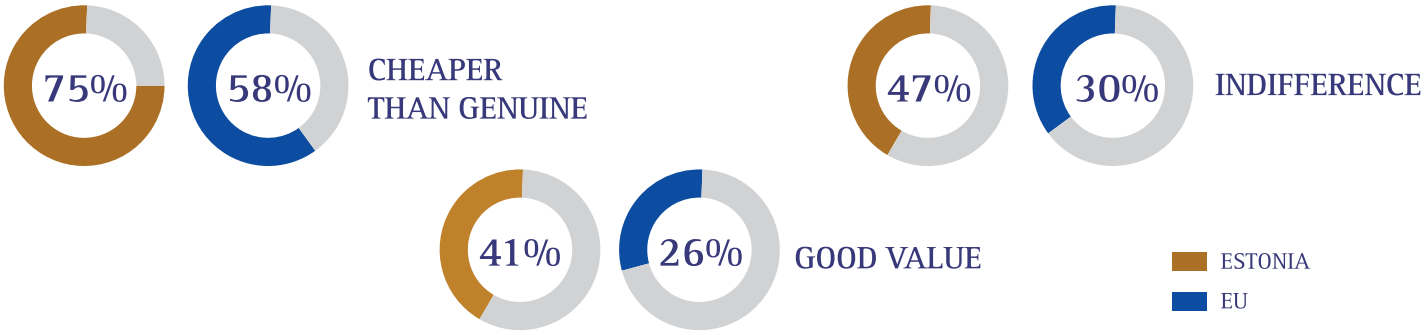
Bought counterfeit goods online



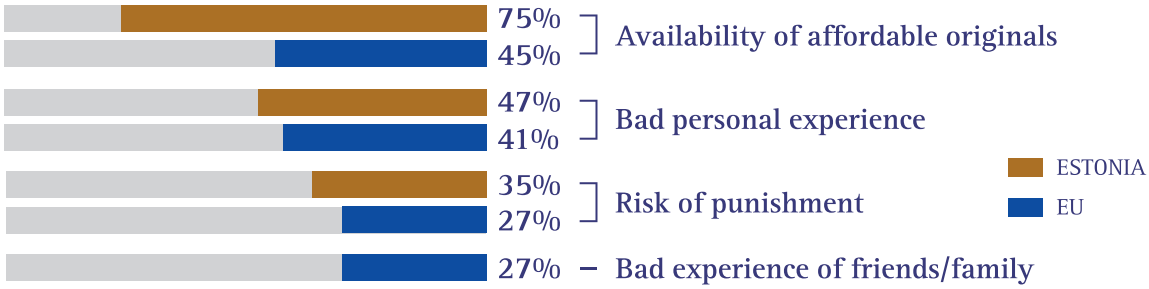
Main counterfeit goods purchased online



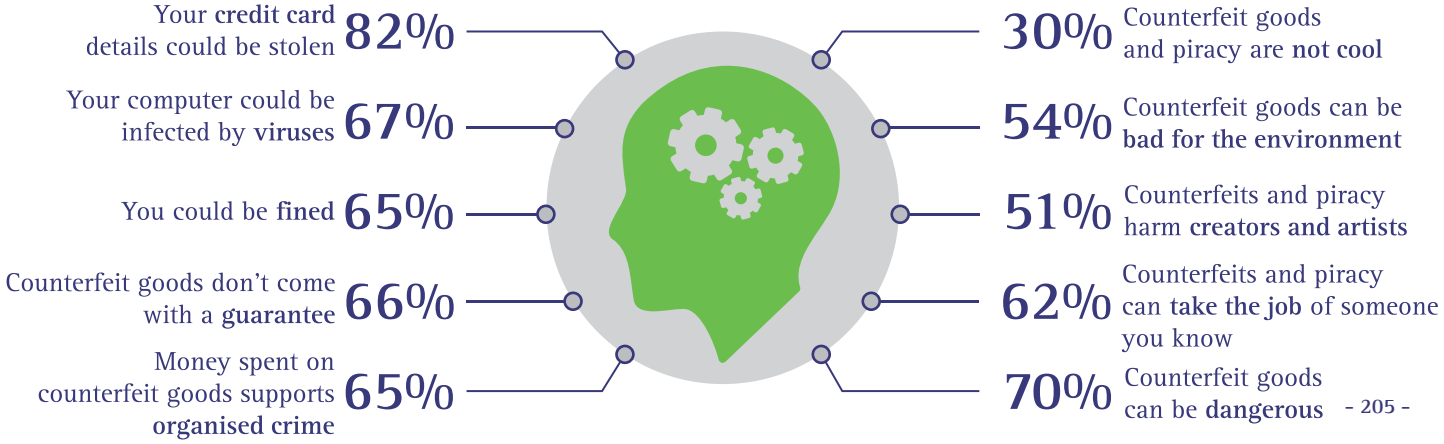
Main reasons to buy counterfeit goods online



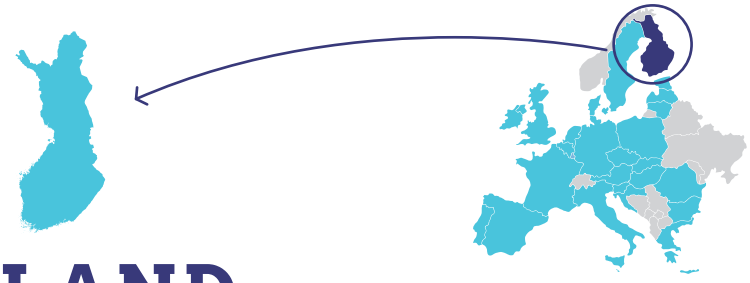
Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE



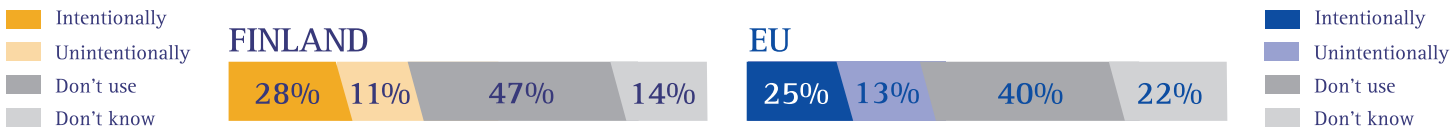
FINLAND

- Youth IP perception and online behaviour -

DIGITAL CONTENT

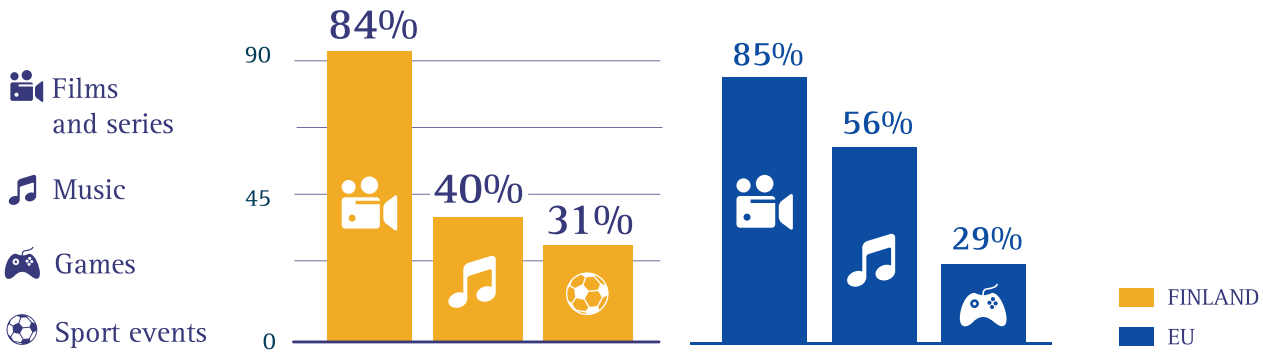
CONTENT

Usage of illegal sources



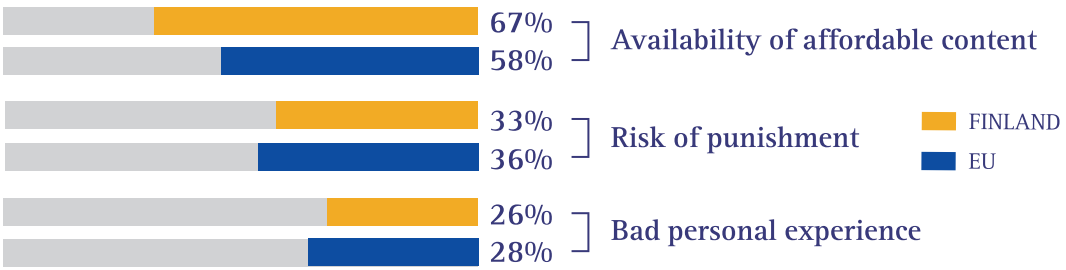
Main digital content accessed from illegal sources

ONLINE



Main reasons to choose illegal sources

Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

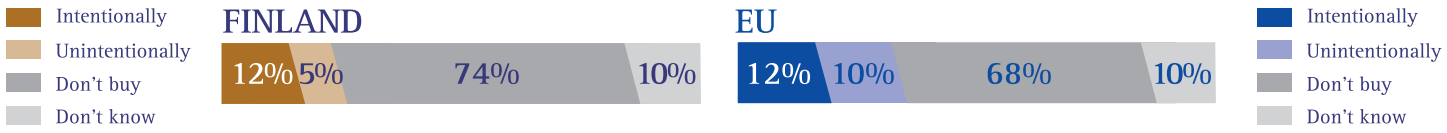
FINLAND

PHYSICAL GOODS

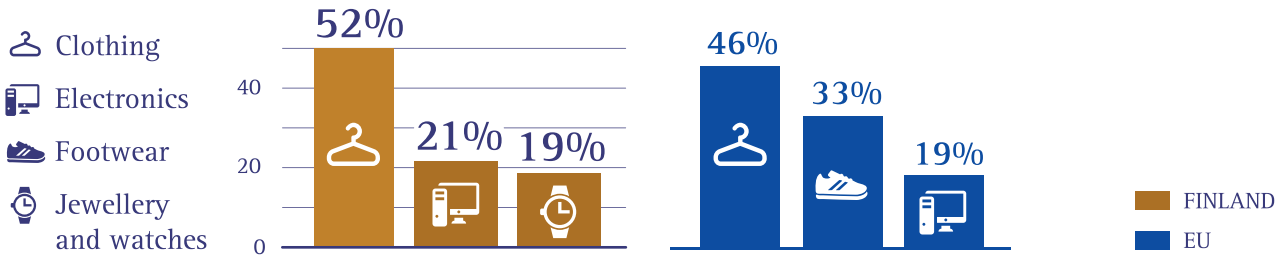
GOODS

PHYSICAL

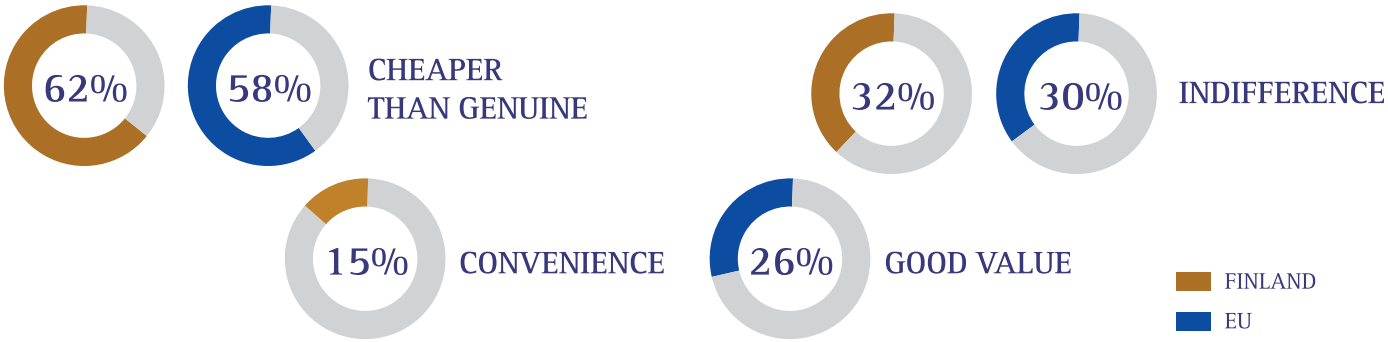
Bought counterfeit goods online



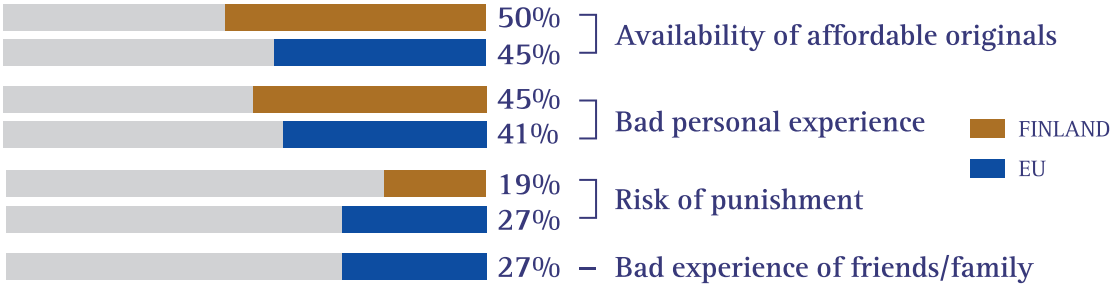
Main counterfeit goods purchased online



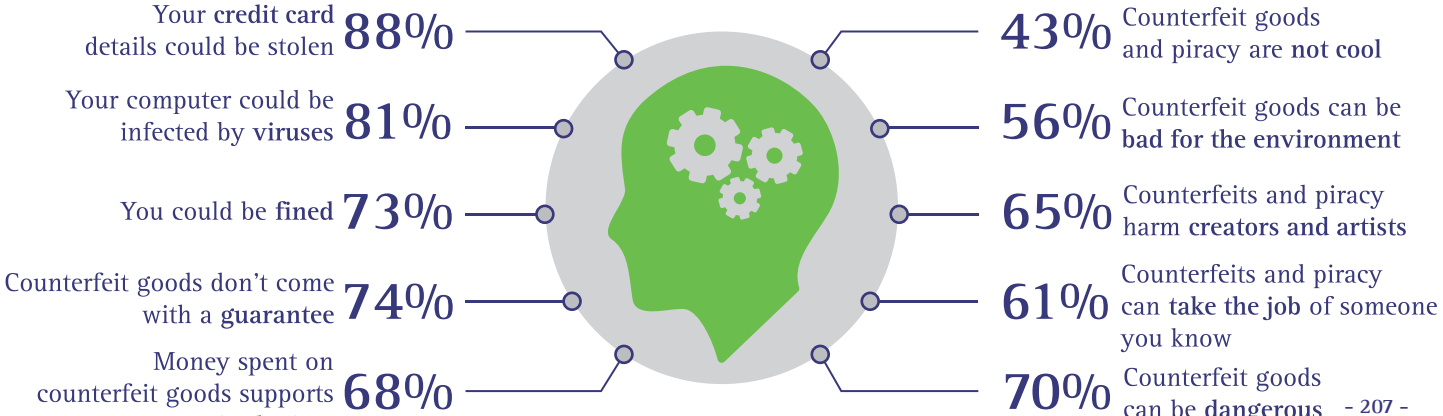
Main reasons to buy counterfeit goods online



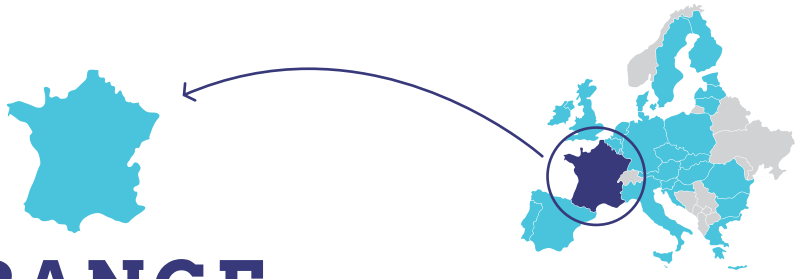
Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE



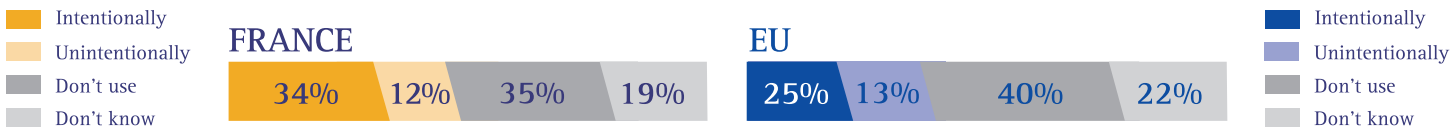
FRANCE

- Youth IP perception and online behaviour -

DIGITAL CONTENT

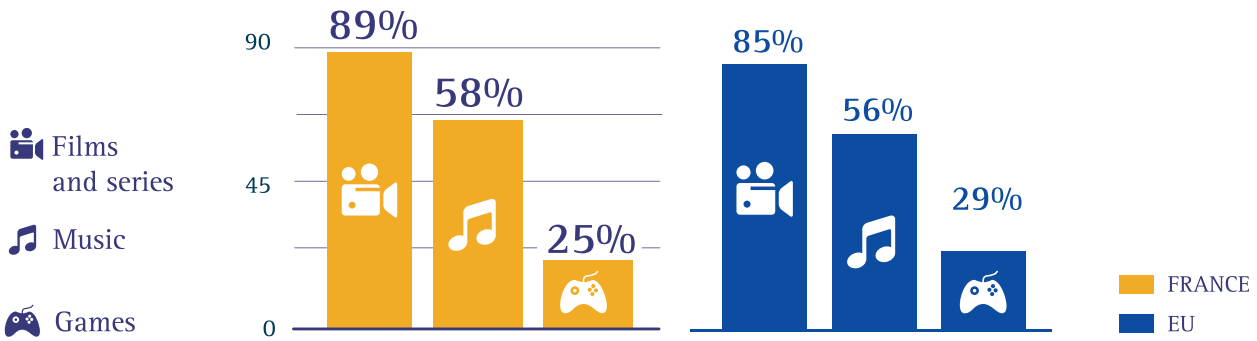
CONTENT

Usage of illegal sources



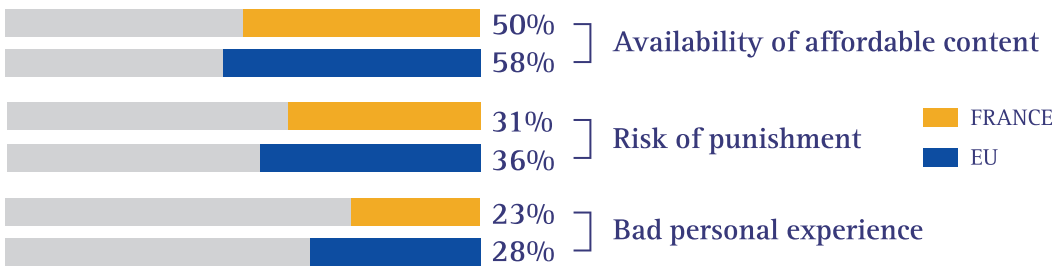
ONLINE

Main digital content accessed from illegal sources



Main reasons to choose illegal sources

Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

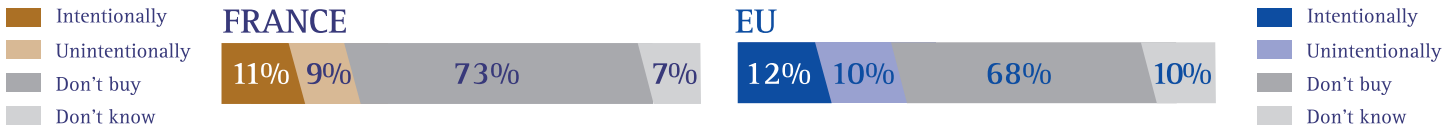
FRANCE

PHYSICAL GOODS

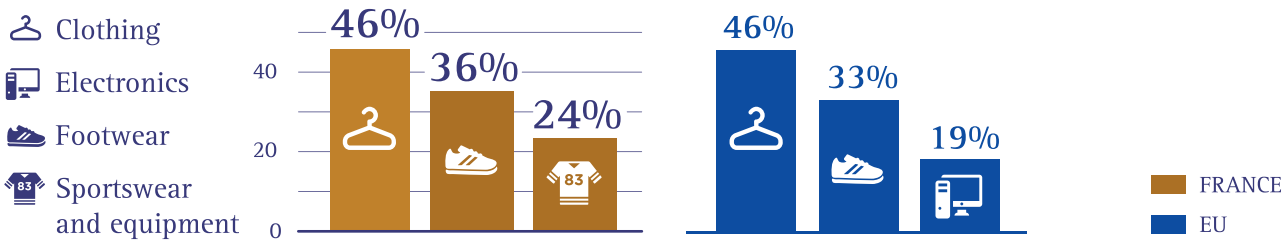
GOODS

PHYSICAL

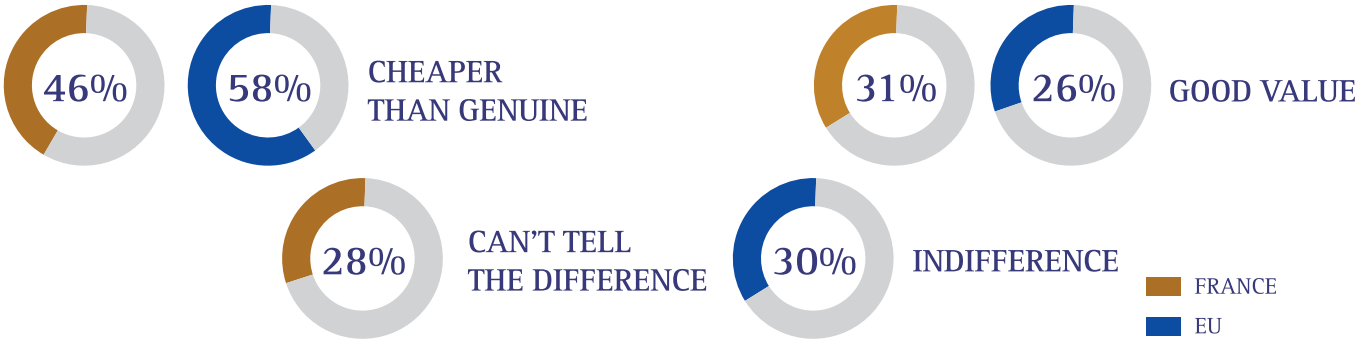
Bought counterfeit goods online



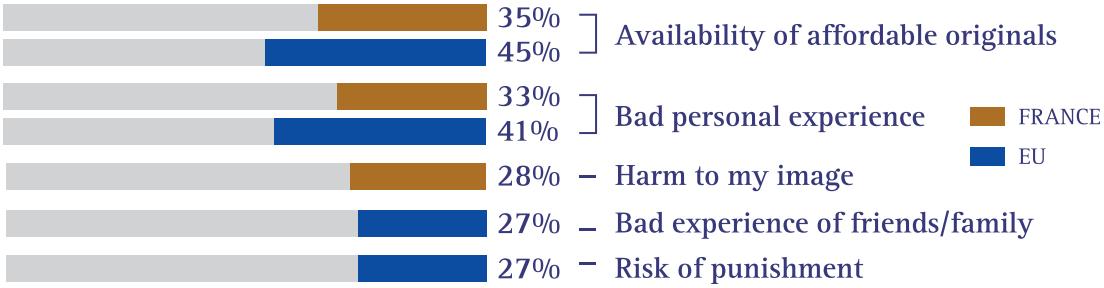
Main counterfeit goods purchased online



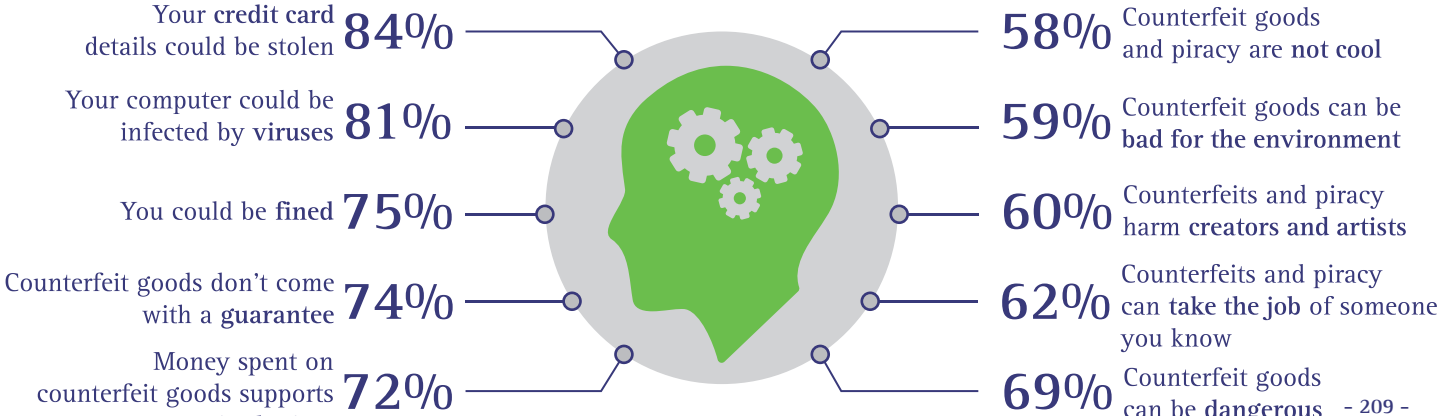
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

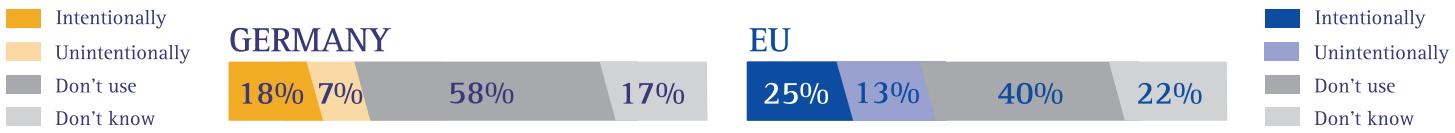
GERMANY

- Youth IP perception and online behaviour -

DIGITAL CONTENT

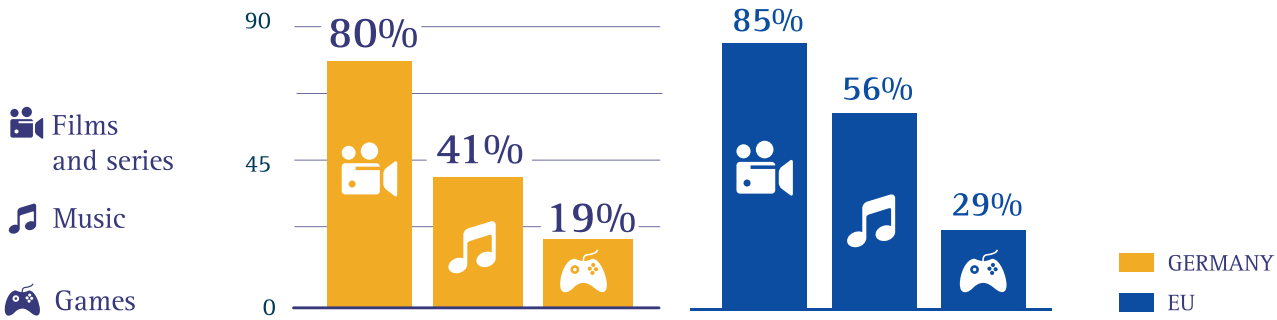
CONTENT

Usage of illegal sources



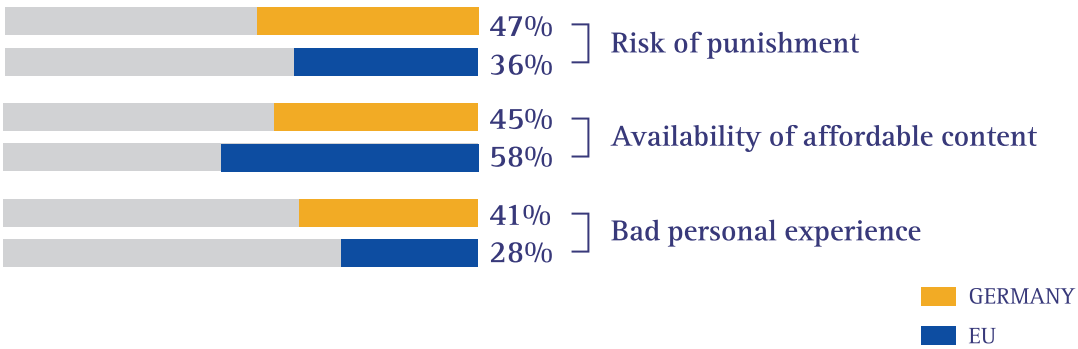
Main digital content accessed from illegal sources

ONLINE



Main reasons to choose illegal sources

Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

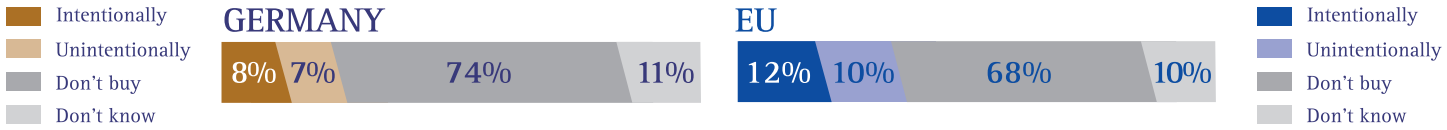
GERMANY

PHYSICAL GOODS

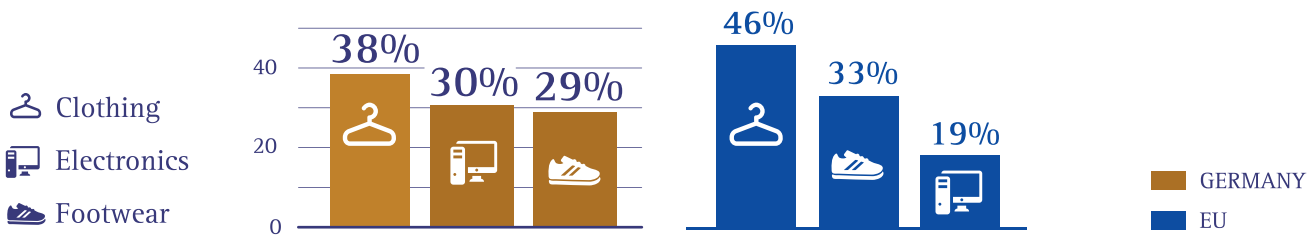
GOODS

PHYSICAL

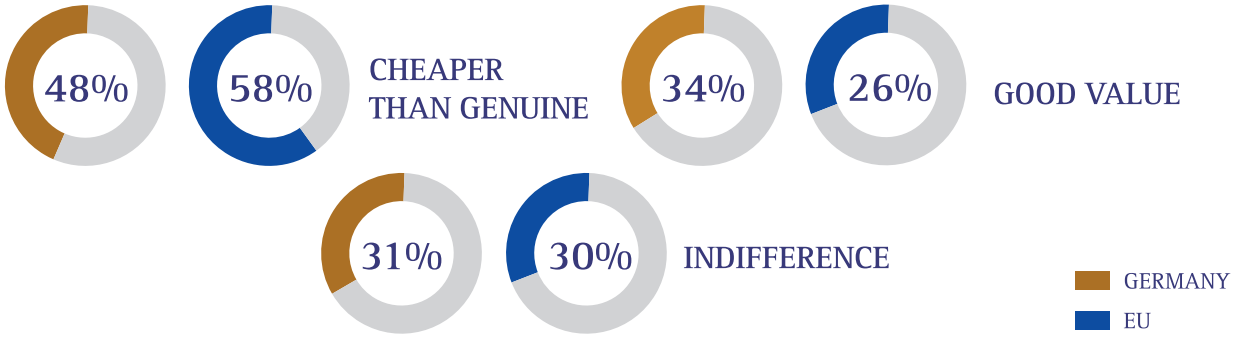
Bought counterfeit goods online



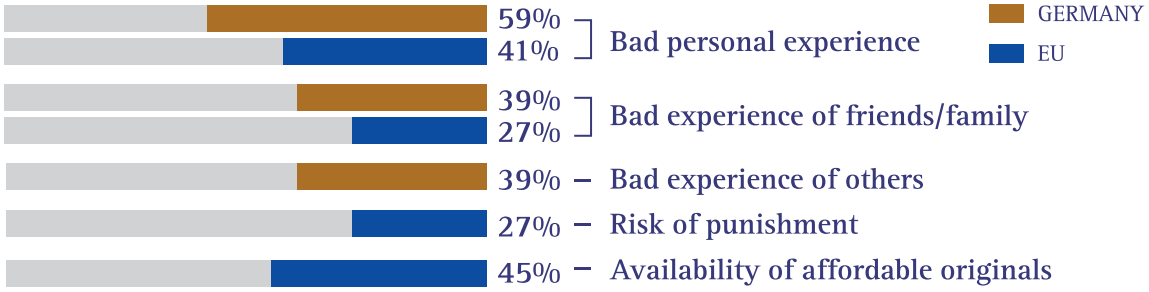
Main counterfeit goods purchased online



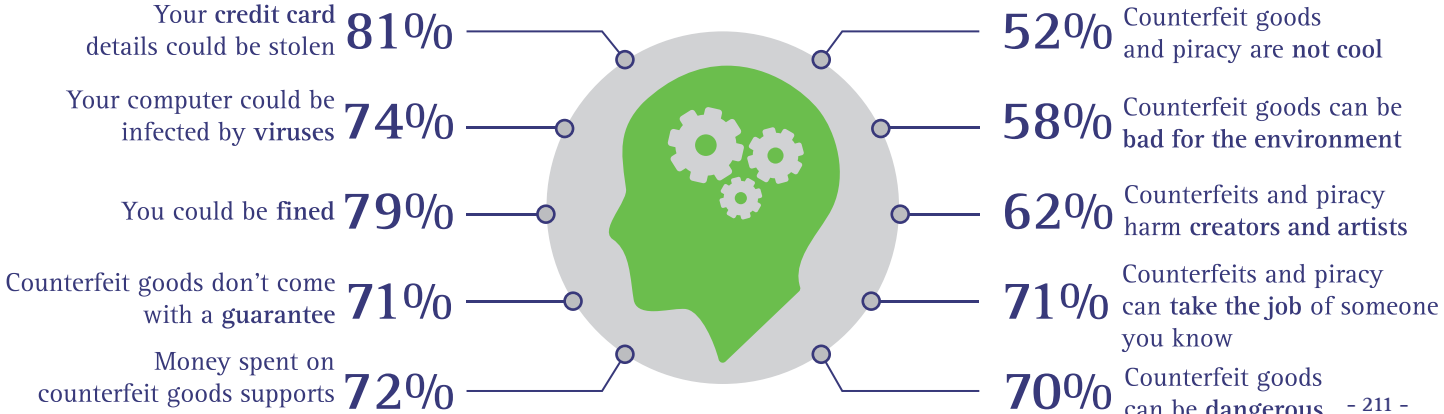
Main reasons to buy counterfeit goods online



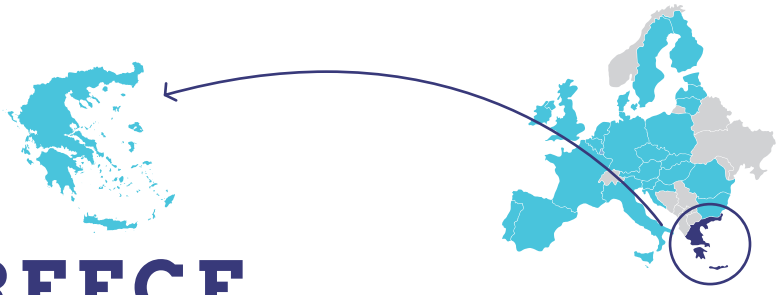
Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE



GREECE

- Youth IP perception and online behaviour -

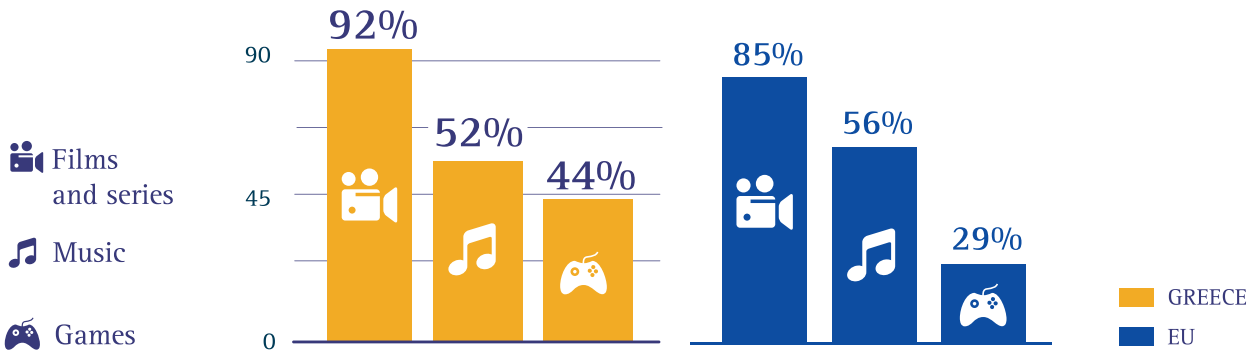
DIGITAL CONTENT

CONTENT

Usage of illegal sources

Main digital content accessed from illegal sources

ONLINE



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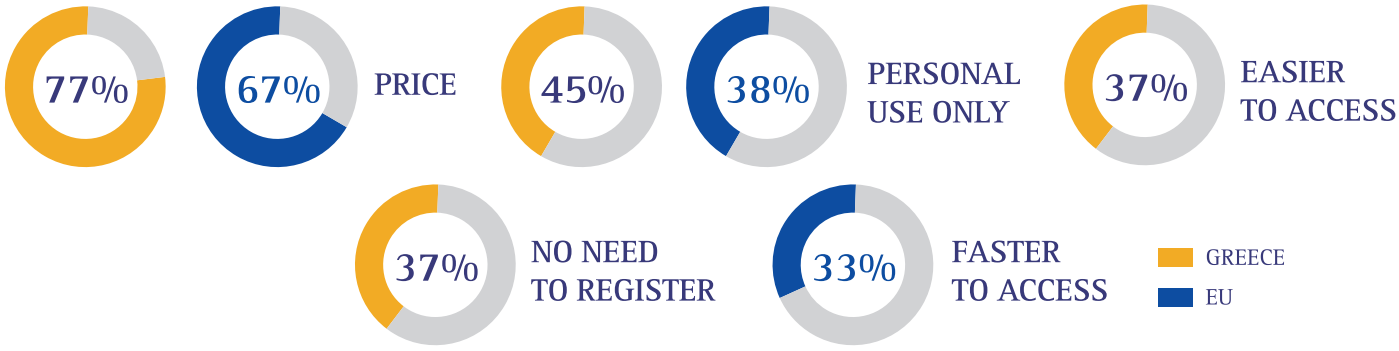
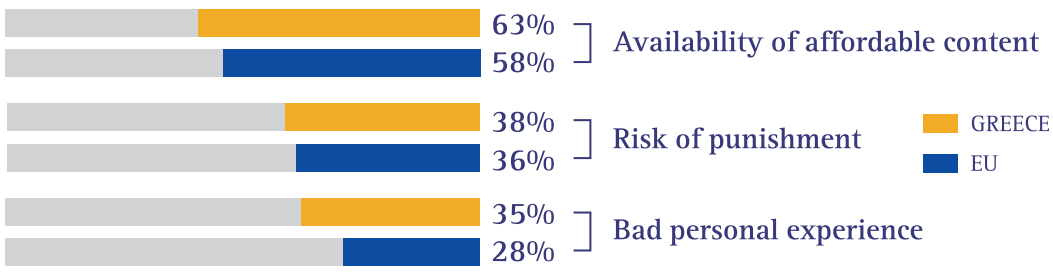


Reasons to stop using illegal sources



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EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

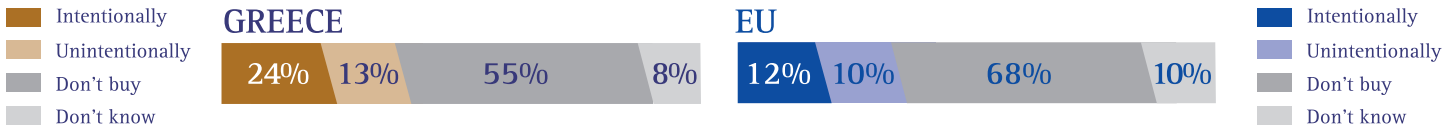
GREECE

PHYSICAL GOODS

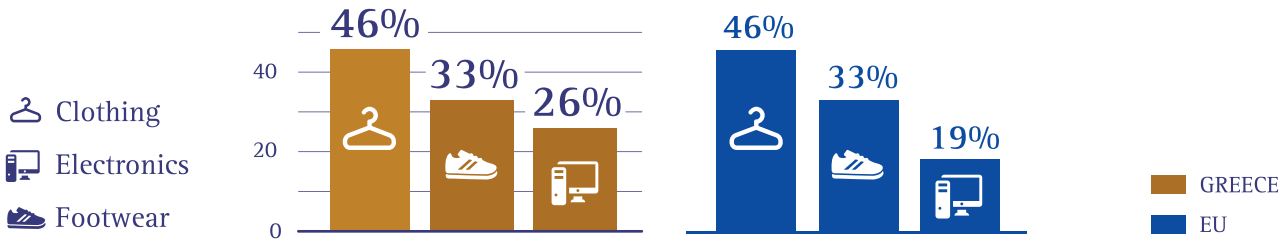
GOODS

PHYSICAL

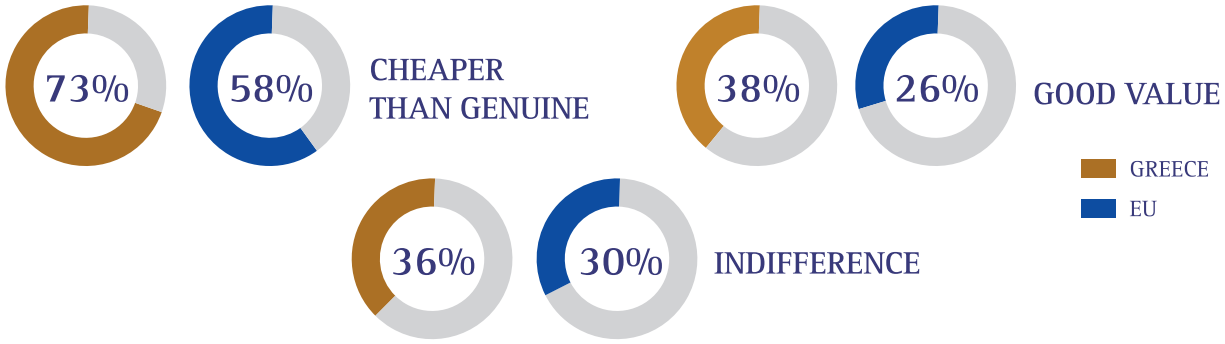
Bought counterfeit goods online



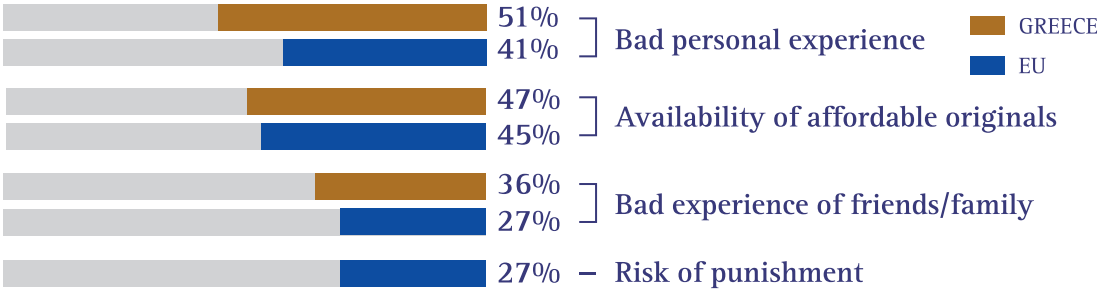
Main counterfeit goods purchased online



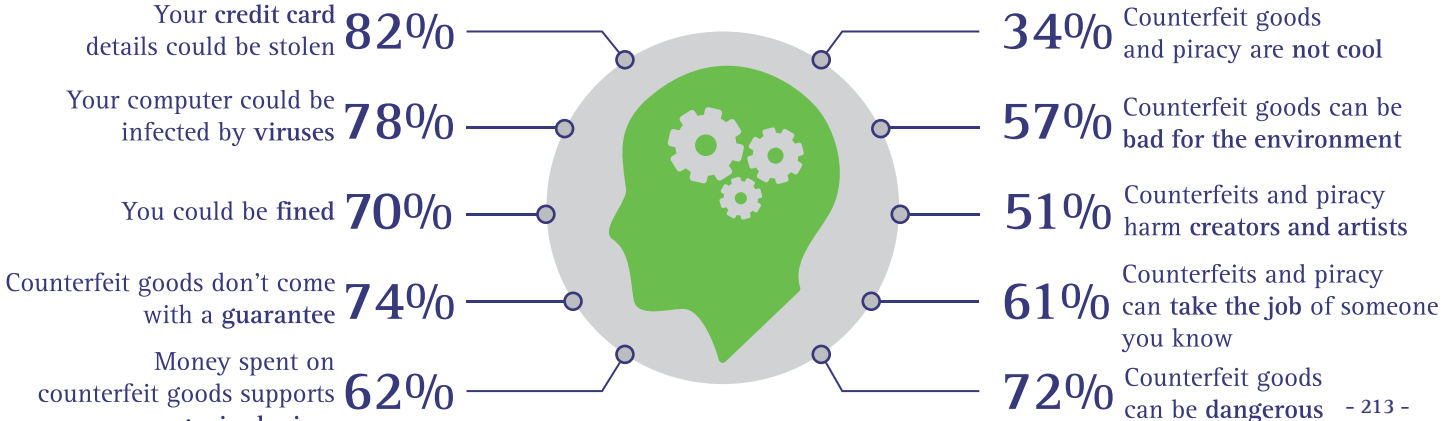
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

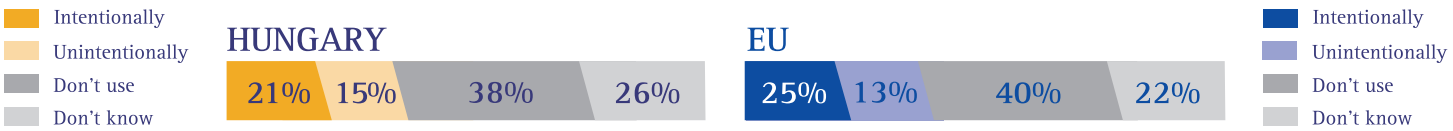
HUNGARY

- Youth IP perception and online behaviour -

DIGITAL CONTENT

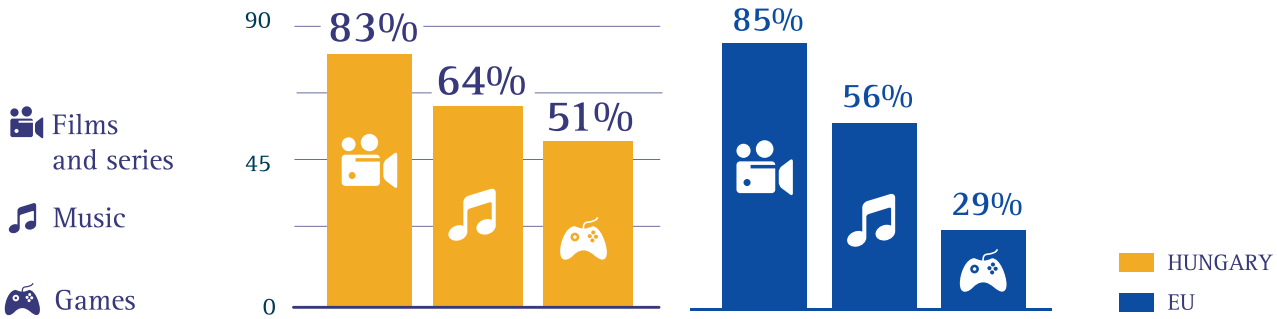
CONTENT

Usage of illegal sources

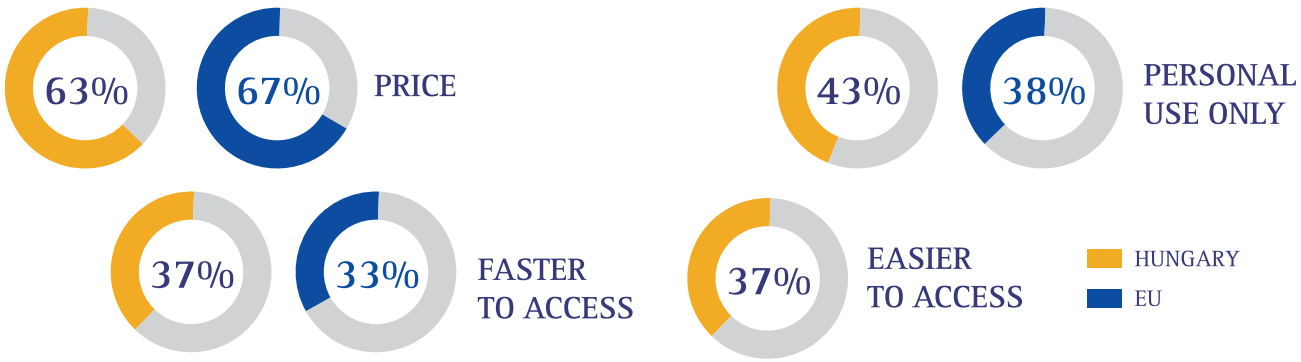


Main digital content accessed from illegal sources

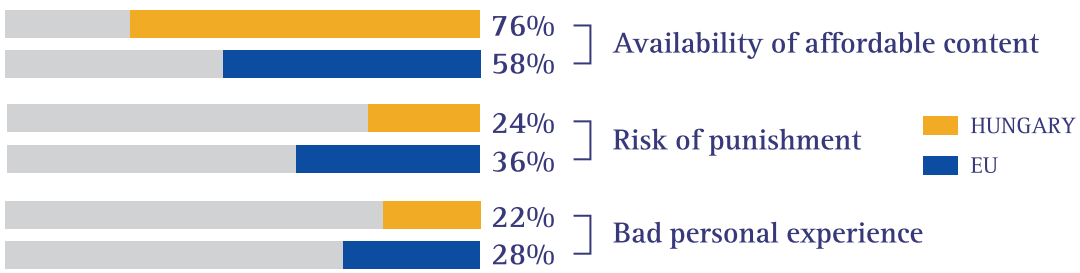
ONLINE



Main reasons to choose illegal sources



Reasons to stop using illegal sources



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EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

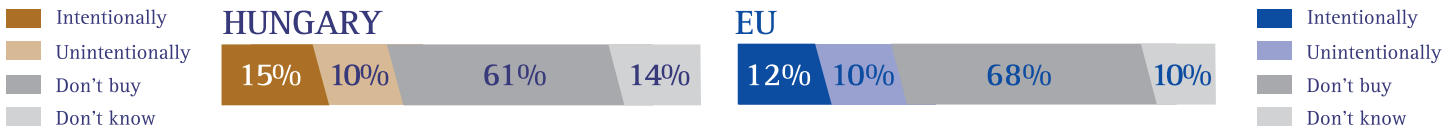
HUNGARY

PHYSICAL GOODS

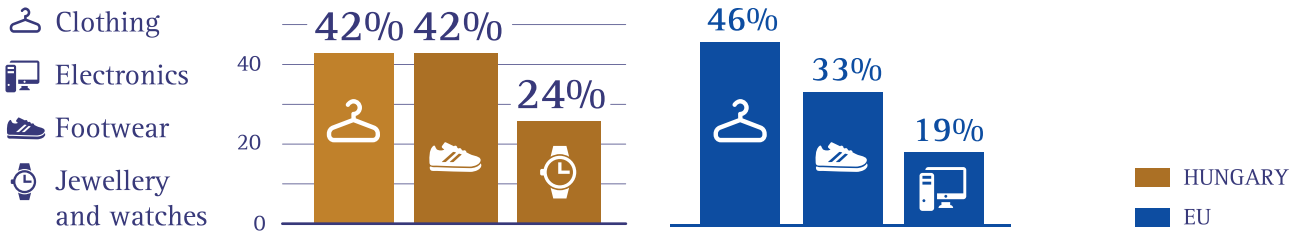
GOODS

PHYSICAL

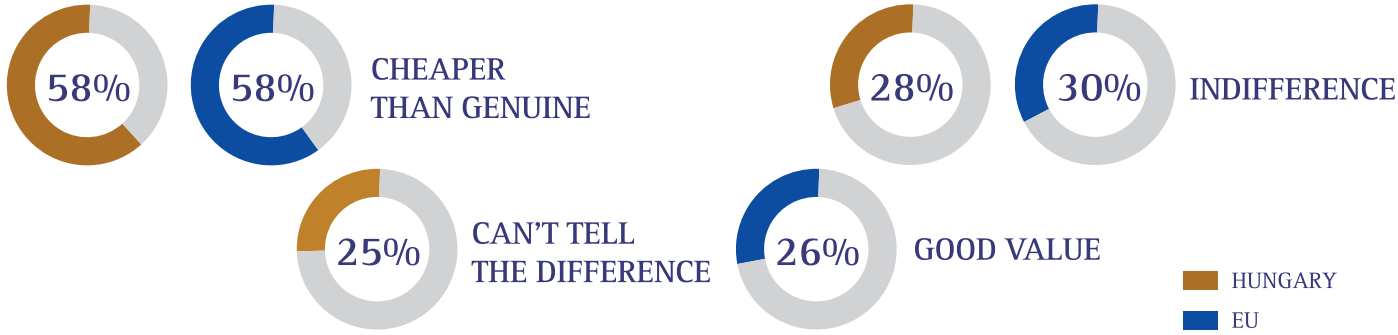
Bought counterfeit goods online



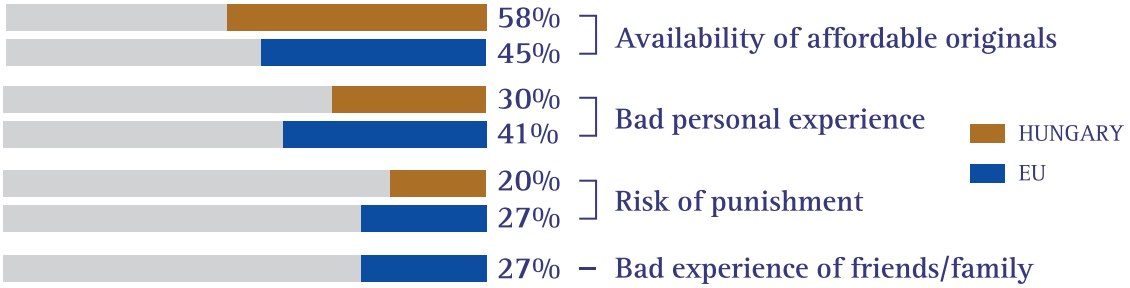
Main counterfeit goods purchased online



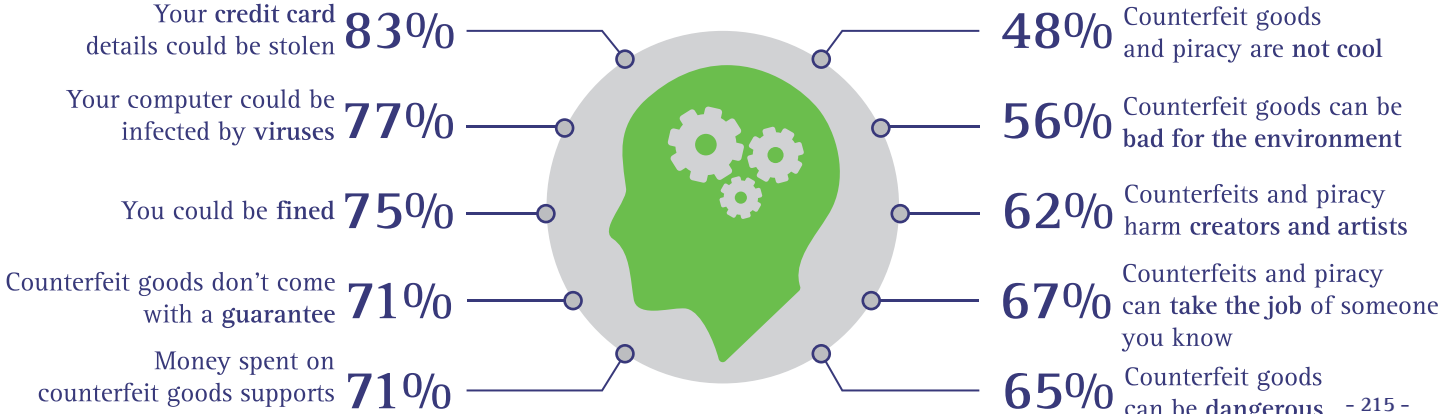
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



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EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

IRELAND

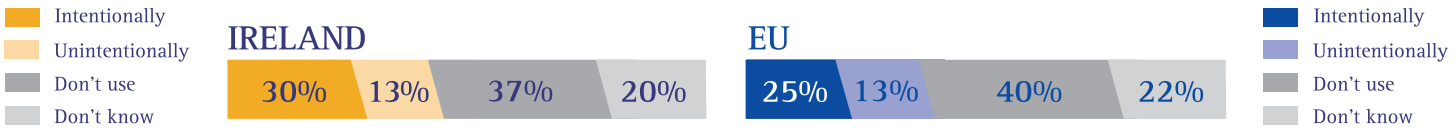
- Youth IP perception and online behaviour -

DIGITAL CONTENT

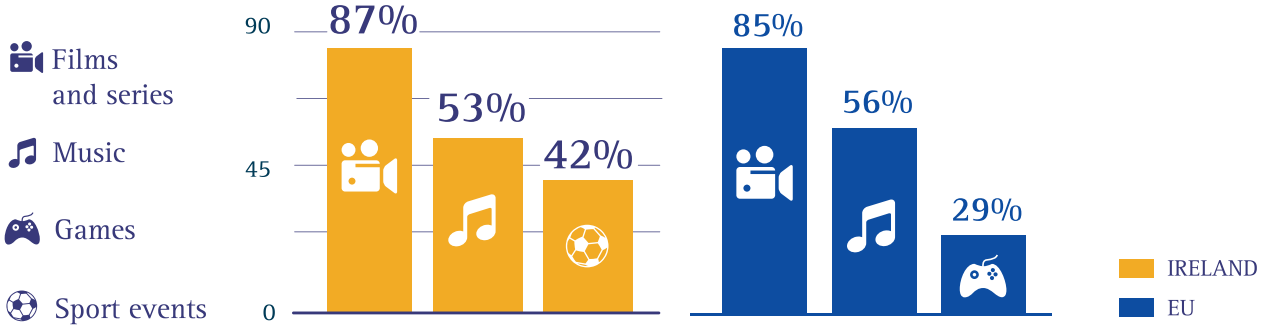
CONTENT

ONLINE

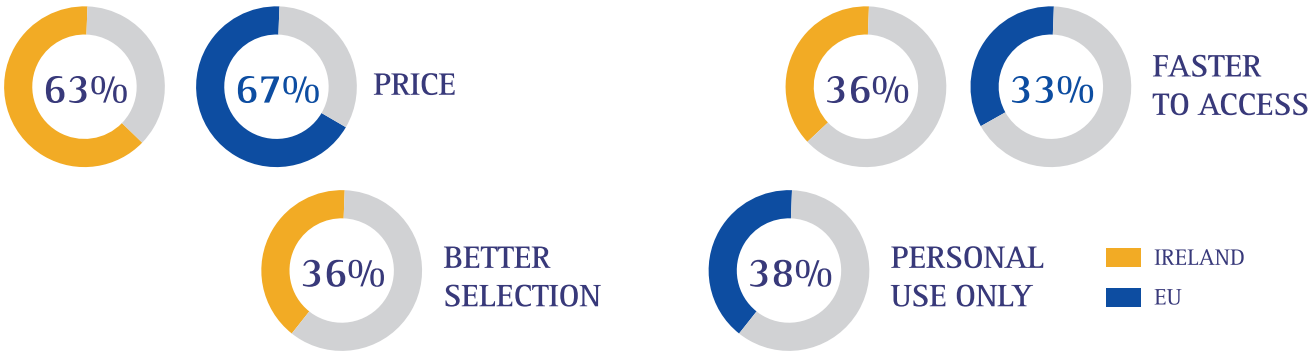
Usage of illegal sources



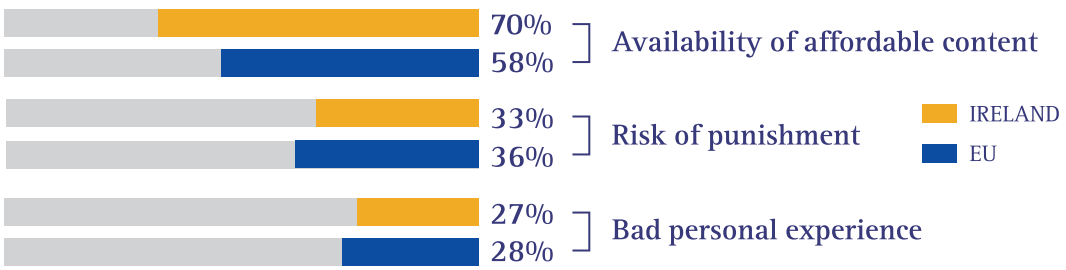
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



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EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

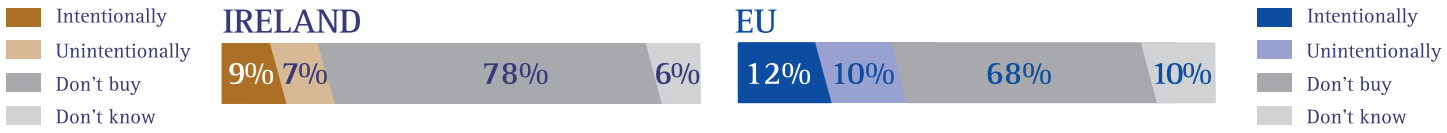
IRELAND

PHYSICAL GOODS

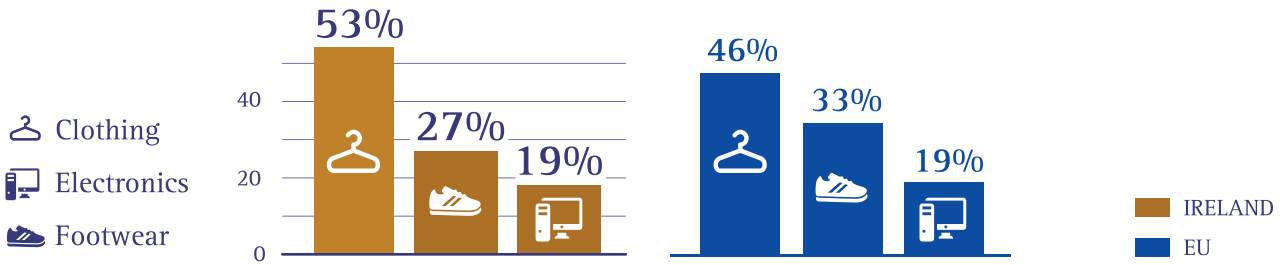
GOODS

PHYSICAL

Bought counterfeit goods online



Main counterfeit goods purchased online



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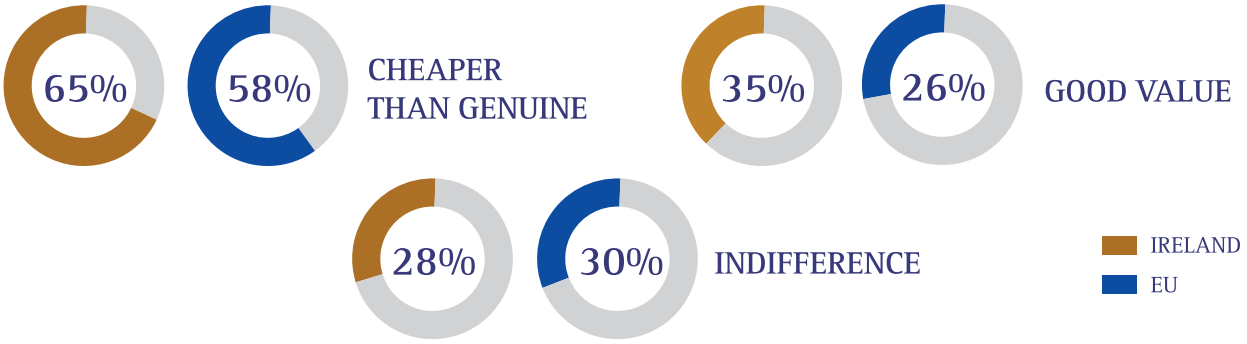

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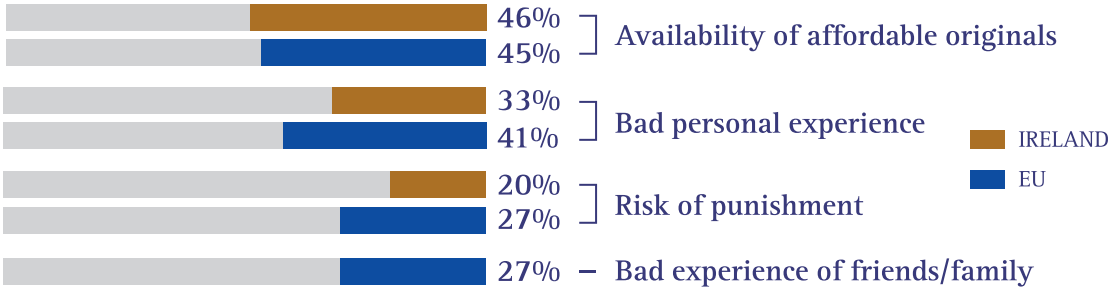
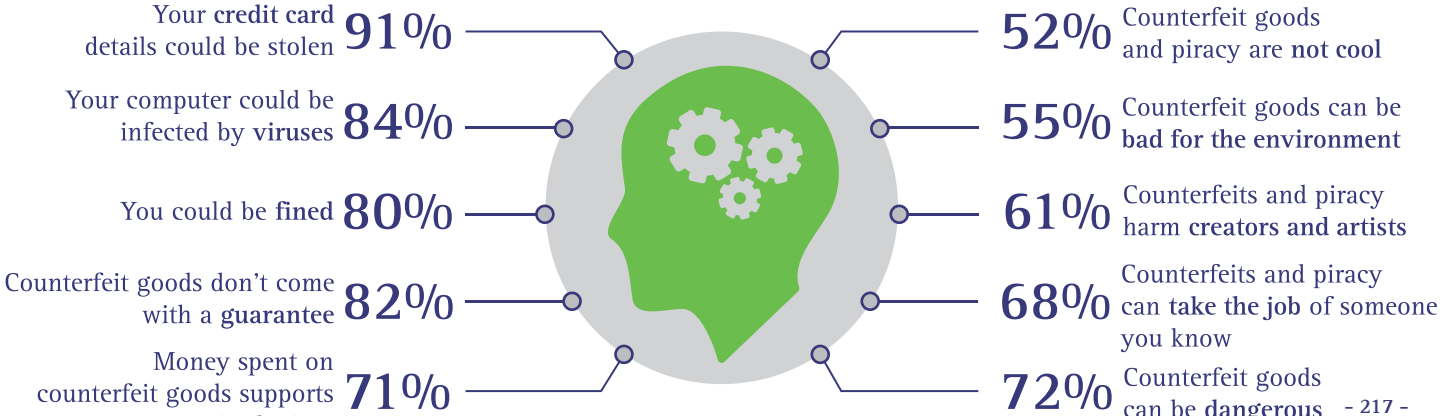


COMMUNICATING ON PIRACY AND COUNTERFEITING



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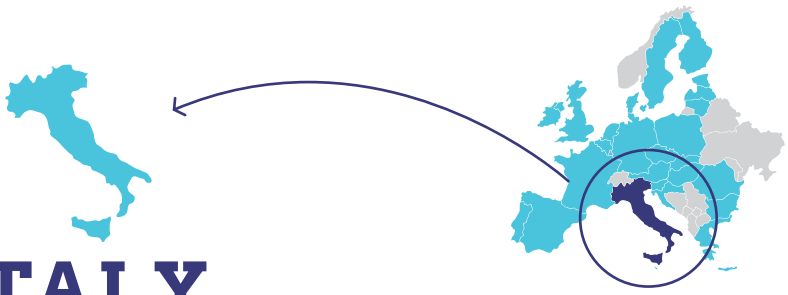


ITALY

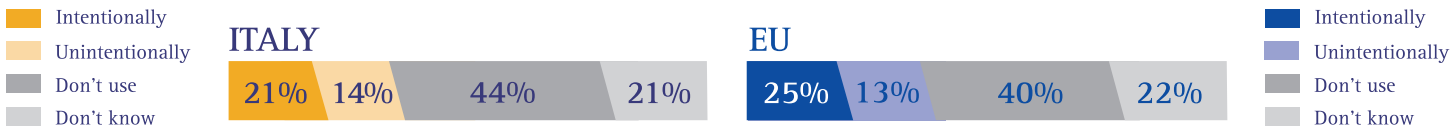
- Youth IP perception and online behaviour -

DIGITAL CONTENT

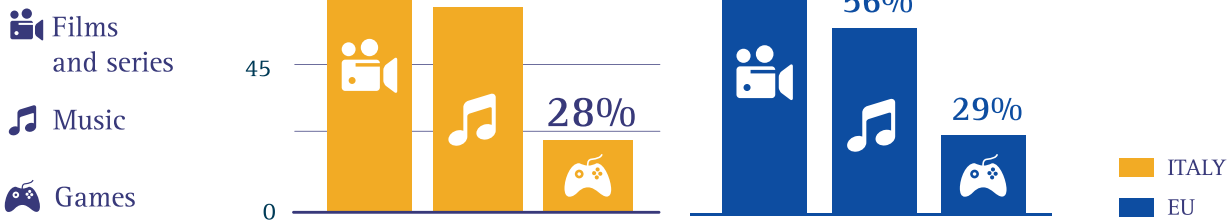
CONTENT

ONLINE

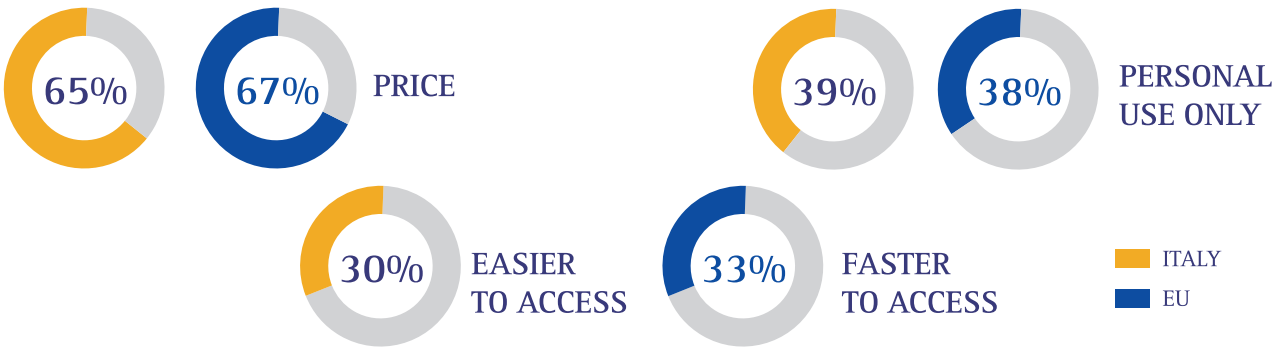
Usage of illegal sources



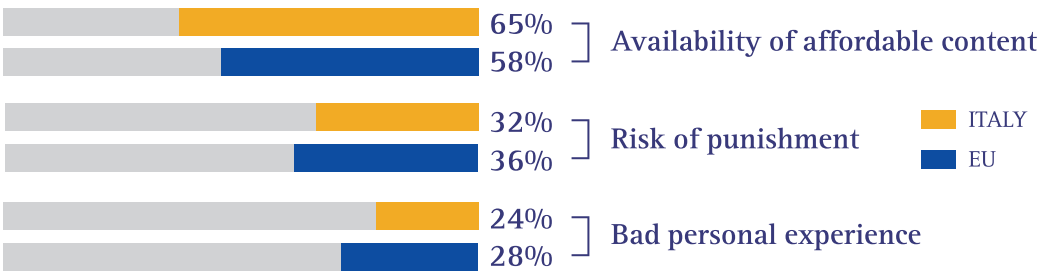
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

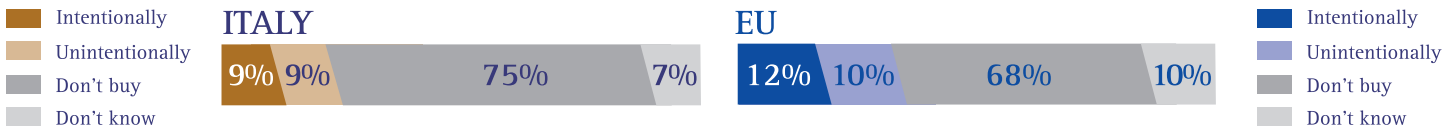
ITALY

PHYSICAL GOODS

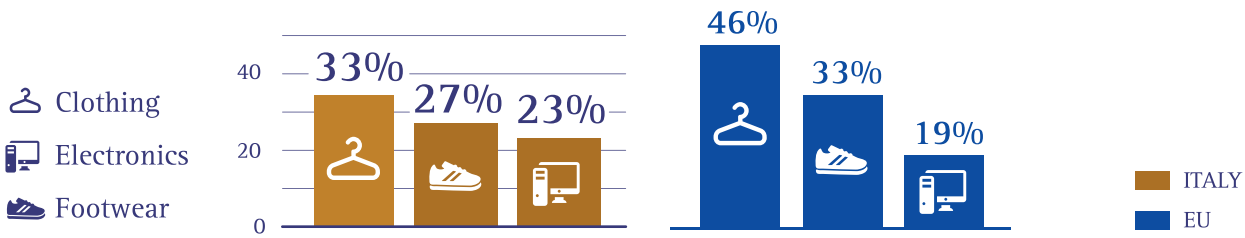
GOODS

PHYSICAL

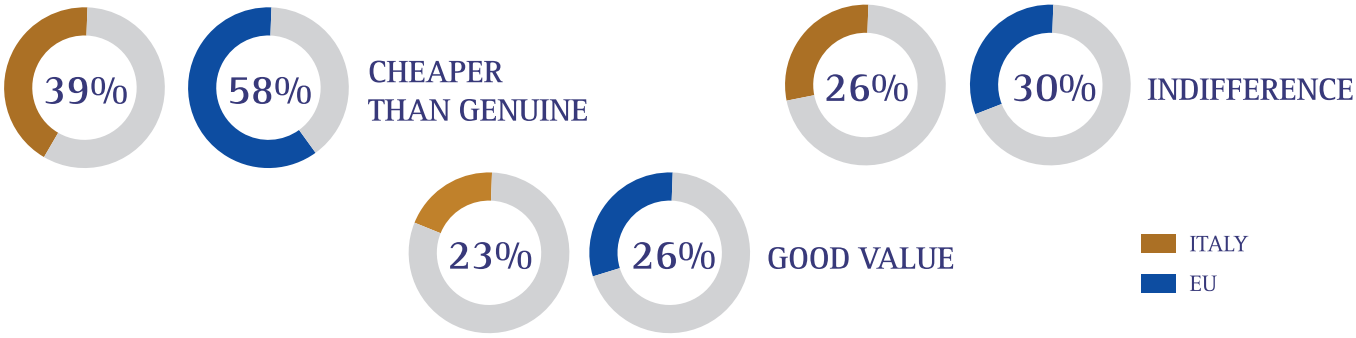
Bought counterfeit goods online



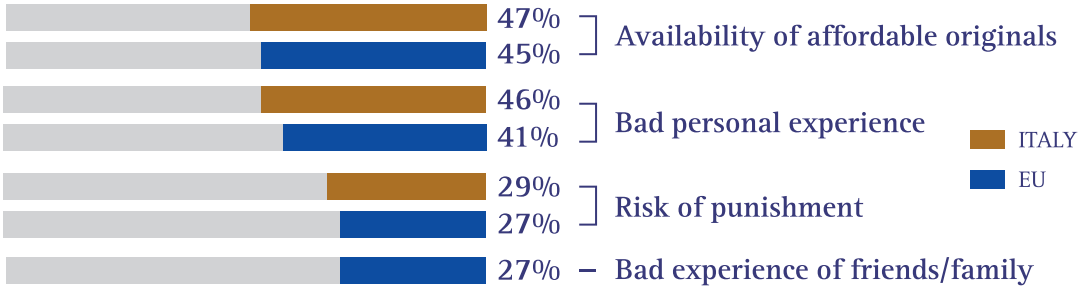
Main counterfeit goods purchased online



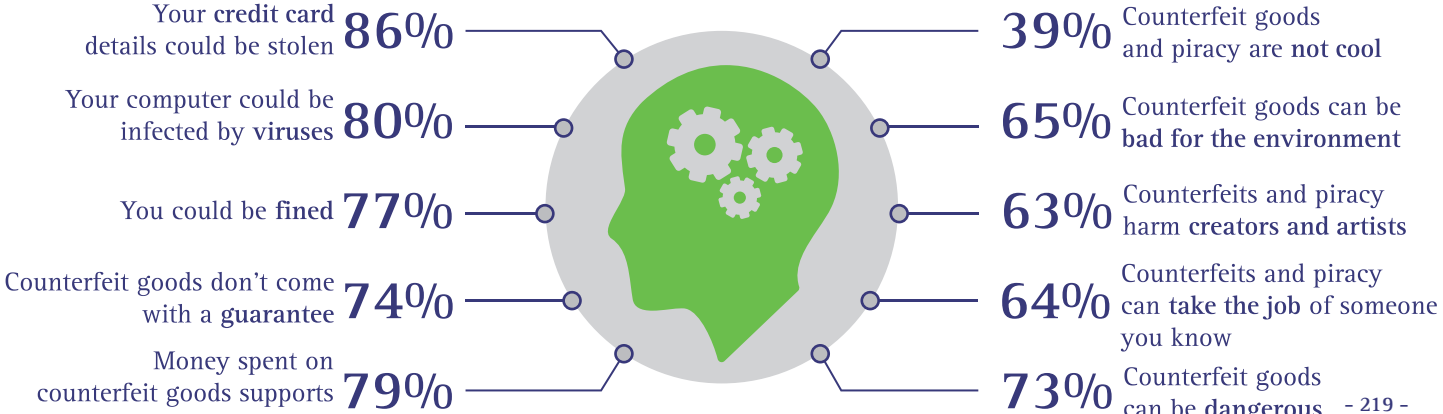
Main reasons to buy counterfeit goods online

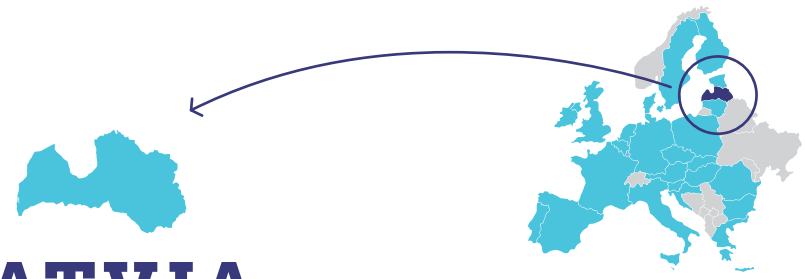


Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING





LATVIA

- Youth IP perception and online behaviour -

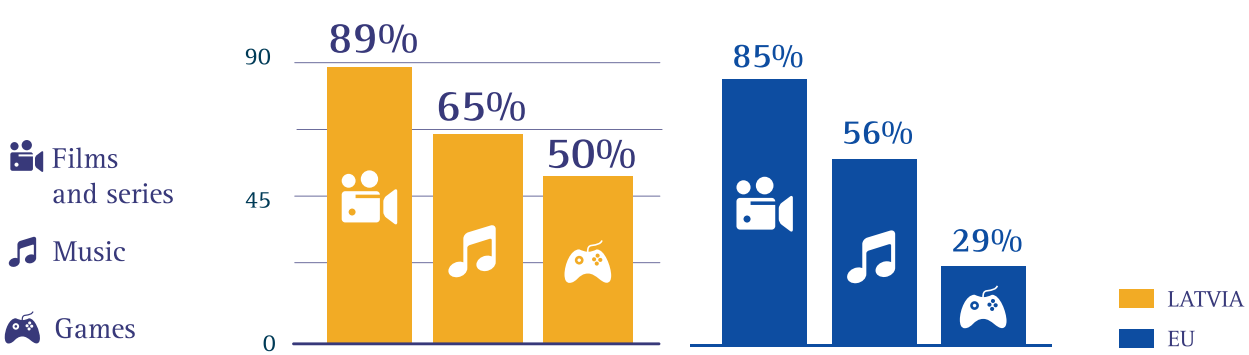
DIGITAL CONTENT

CONTENT

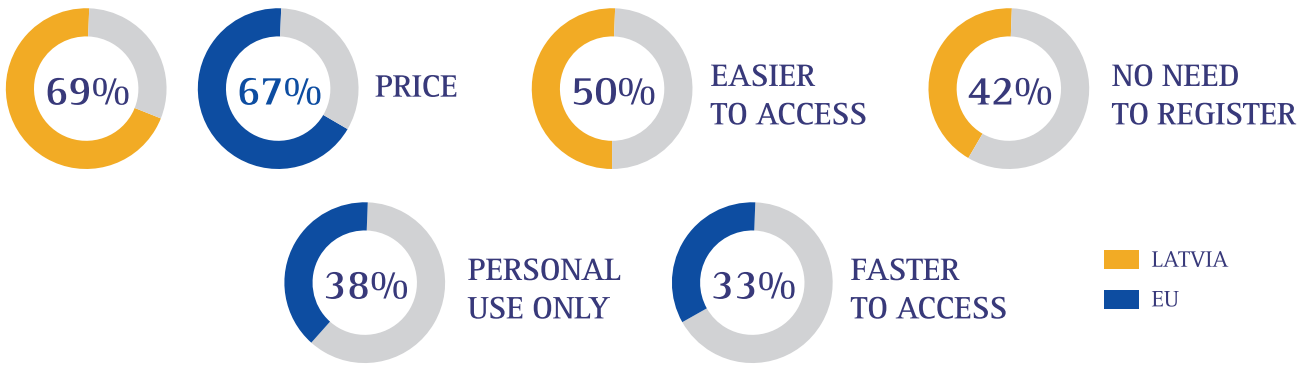
ONLINE

Usage of illegal sources

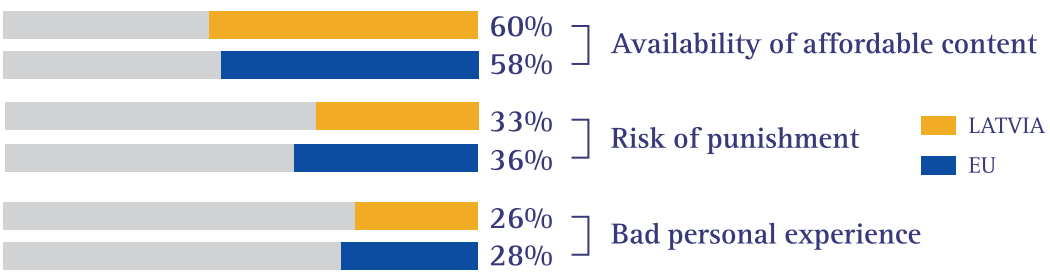
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

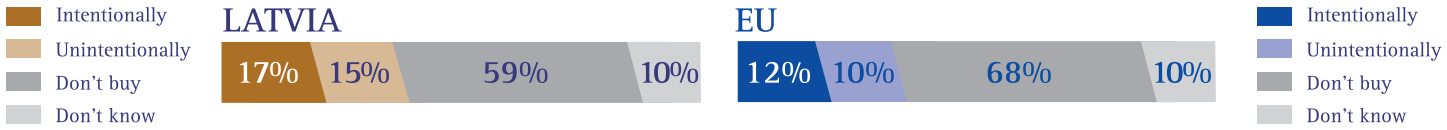
LATVIA

PHYSICAL GOODS

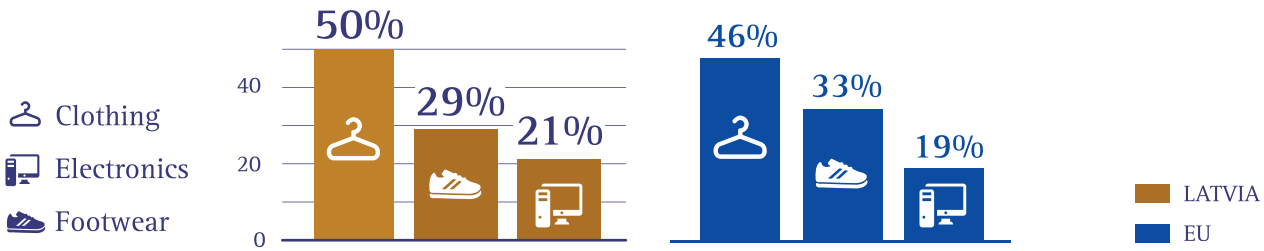
GOODS

PHYSICAL

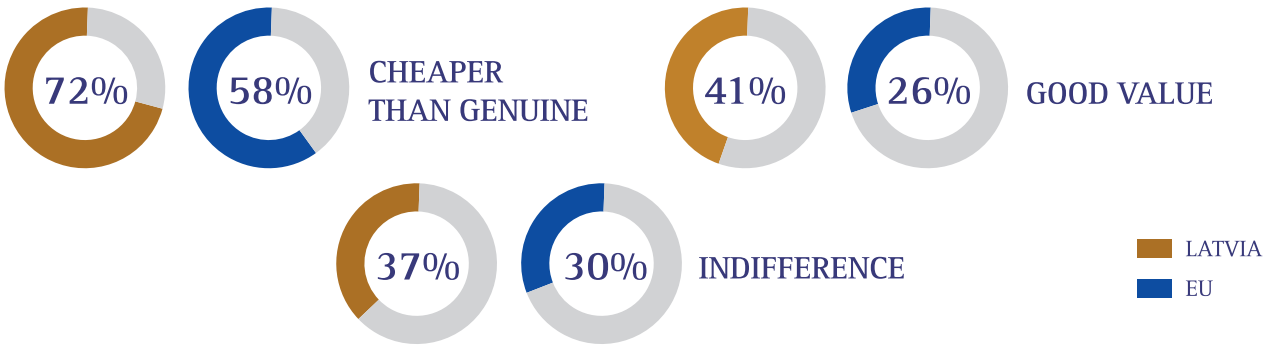
Bought counterfeit goods online



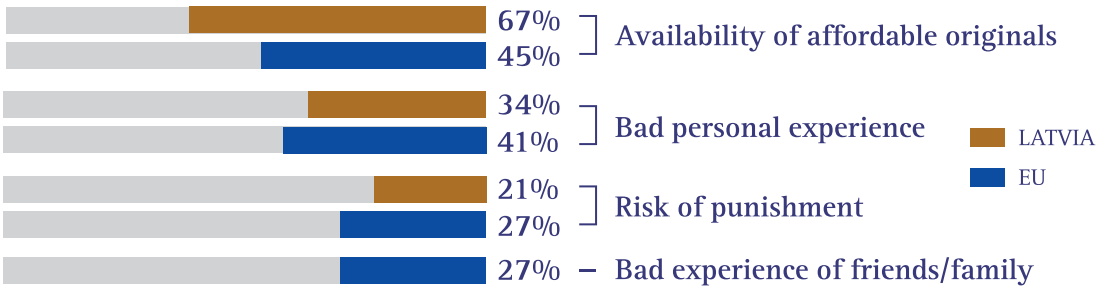
Main counterfeit goods purchased online



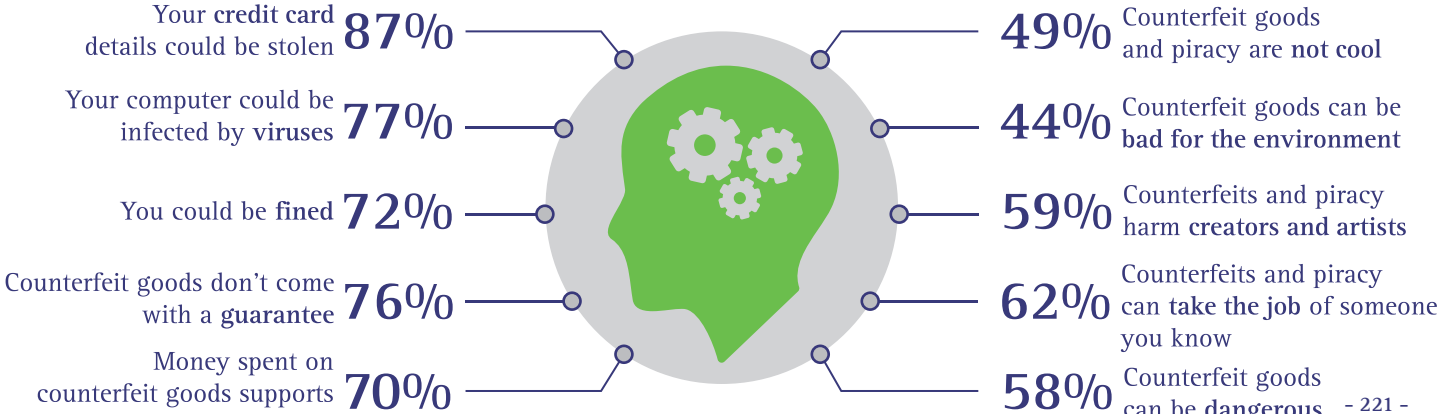
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



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LITHUANIA

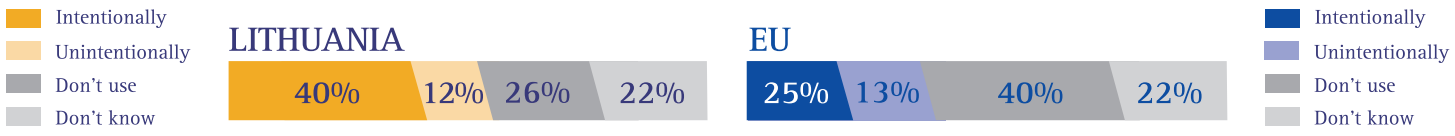
- Youth IP perception and online behaviour -

DIGITAL CONTENT

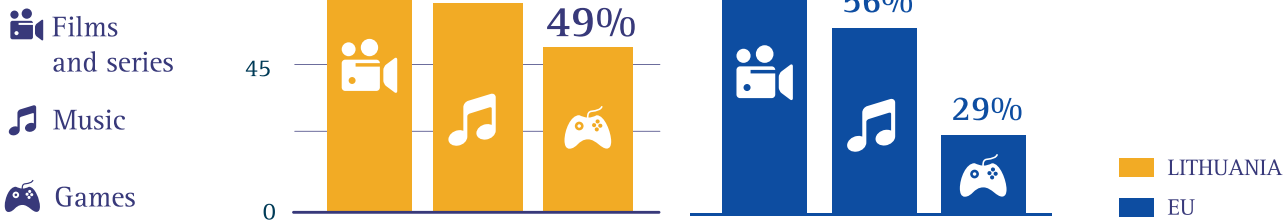
CONTENT

ONLINE

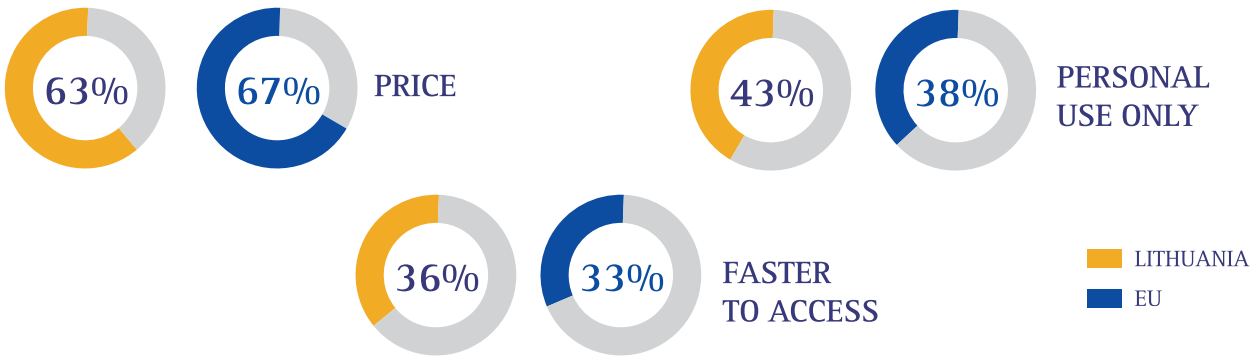
Usage of illegal sources



Main digital content accessed from illegal sources



Main reasons to choose illegal sources



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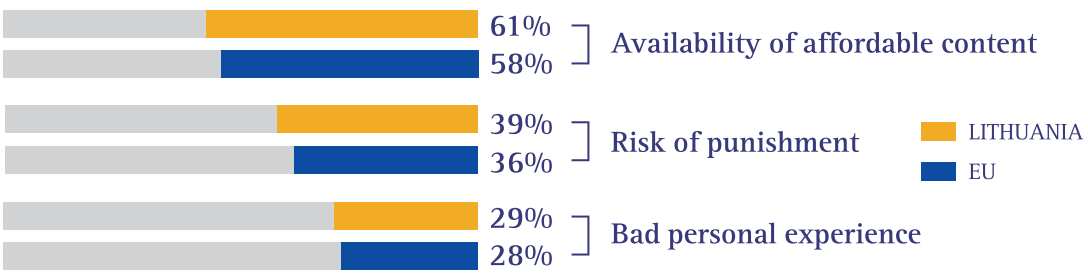


EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

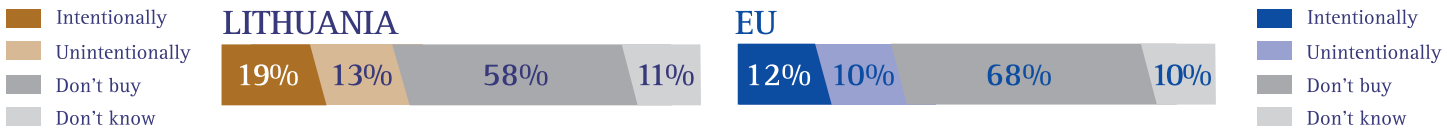
LITHUANIA

PHYSICAL GOODS

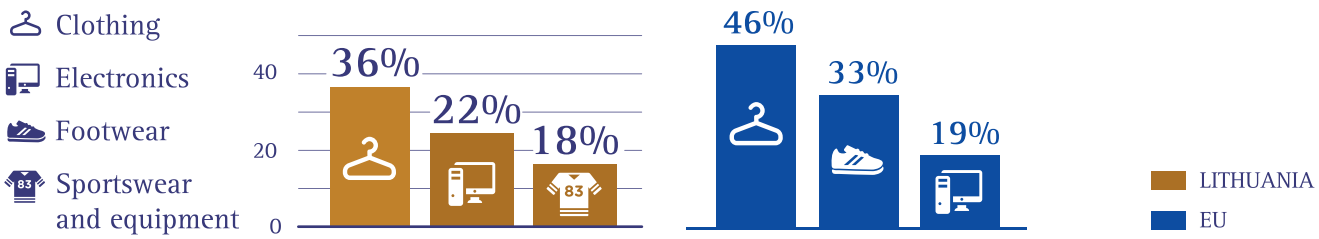
GOODS

PHYSICAL

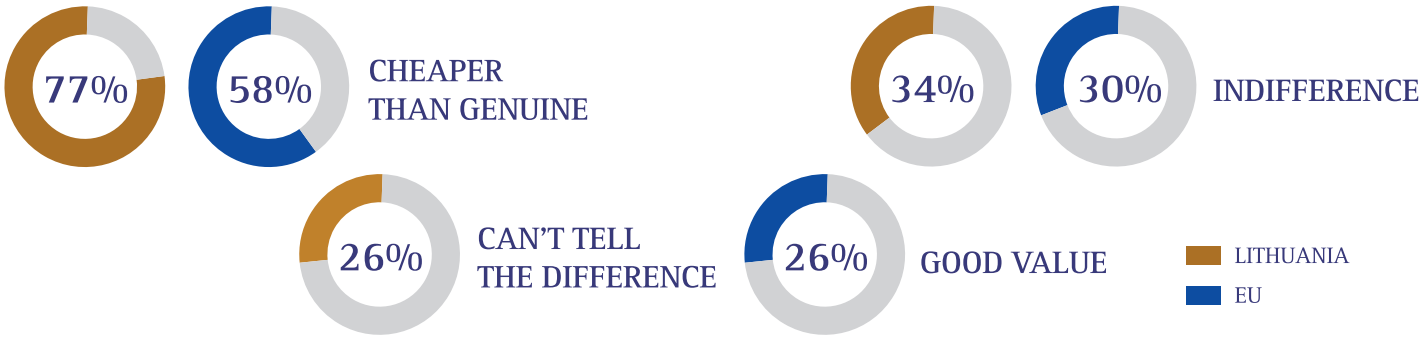
Bought counterfeit goods online



Main counterfeit goods purchased online



Main reasons to buy counterfeit goods online



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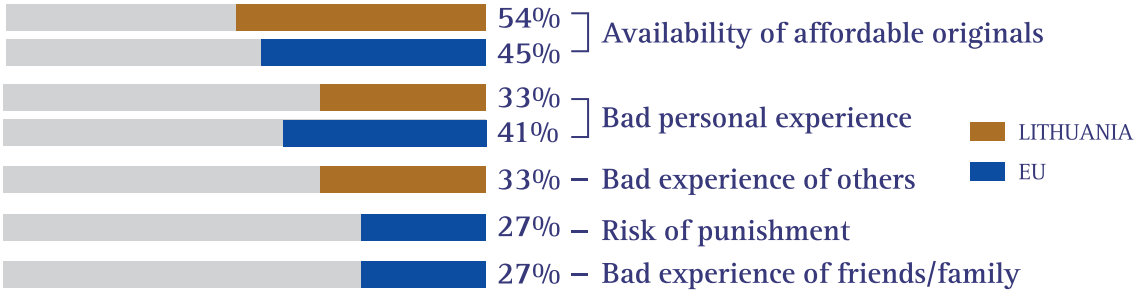
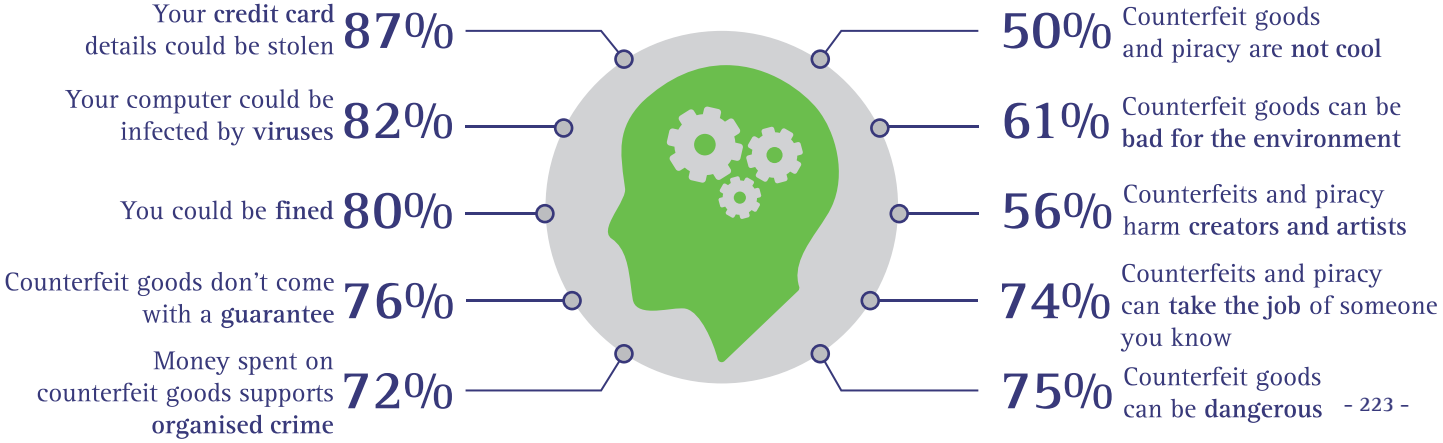


COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

LUXEMBOURG

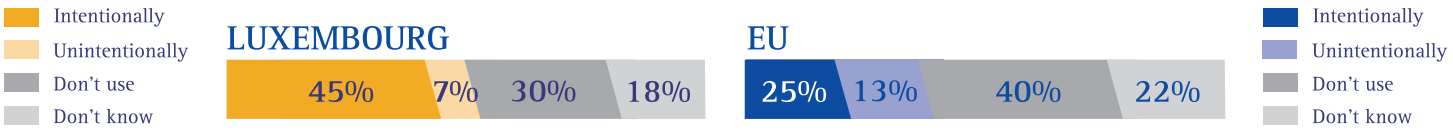
- Youth IP perception and online behaviour -

DIGITAL CONTENT

CONTENT

ONLINE

Usage of illegal sources



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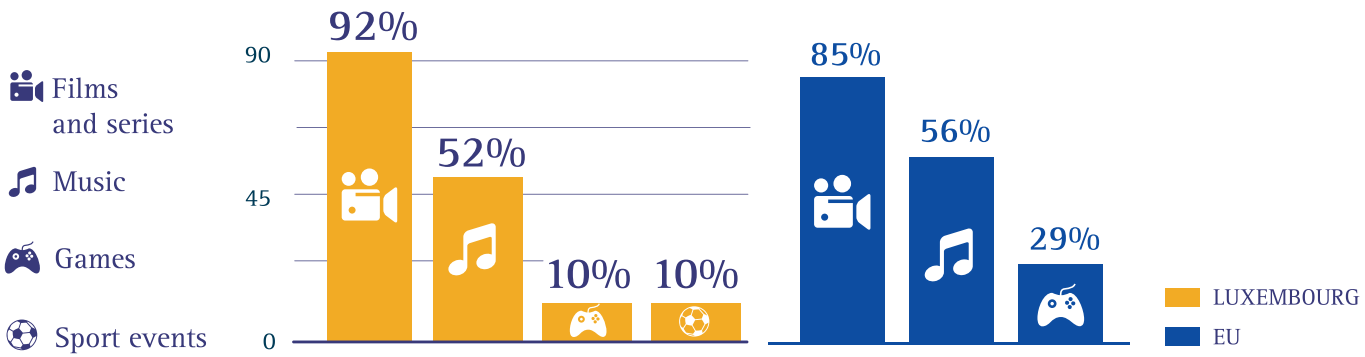

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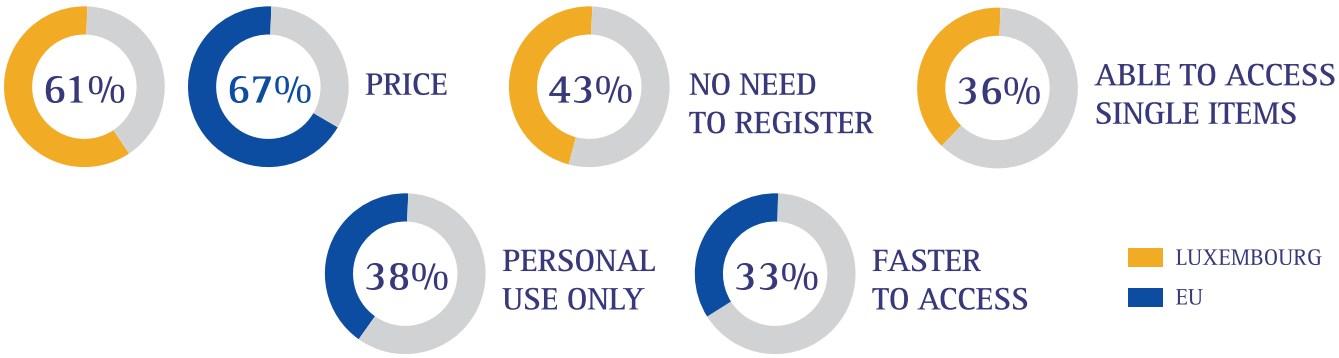
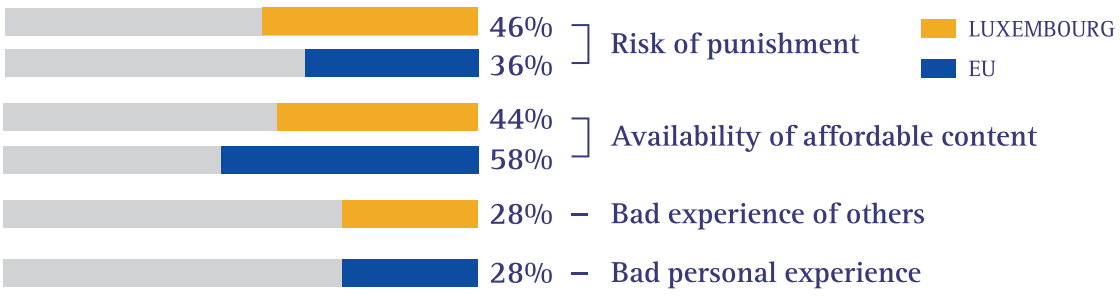


Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

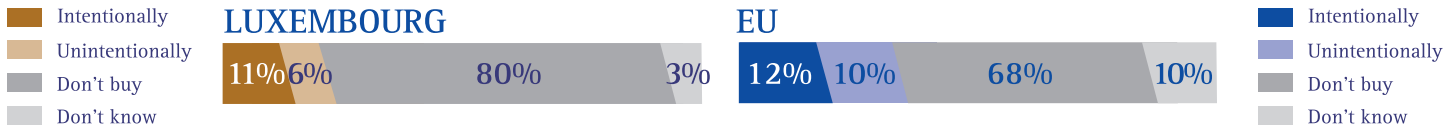
LUXEMBOURG

PHYSICAL GOODS

GOODS

PHYSICAL

Bought counterfeit goods online



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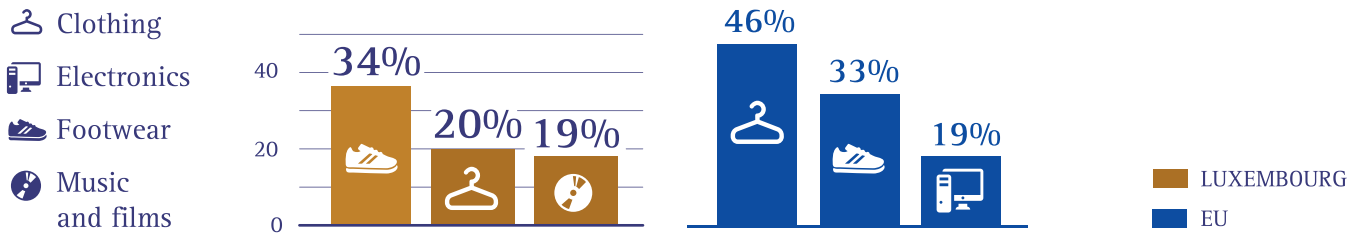
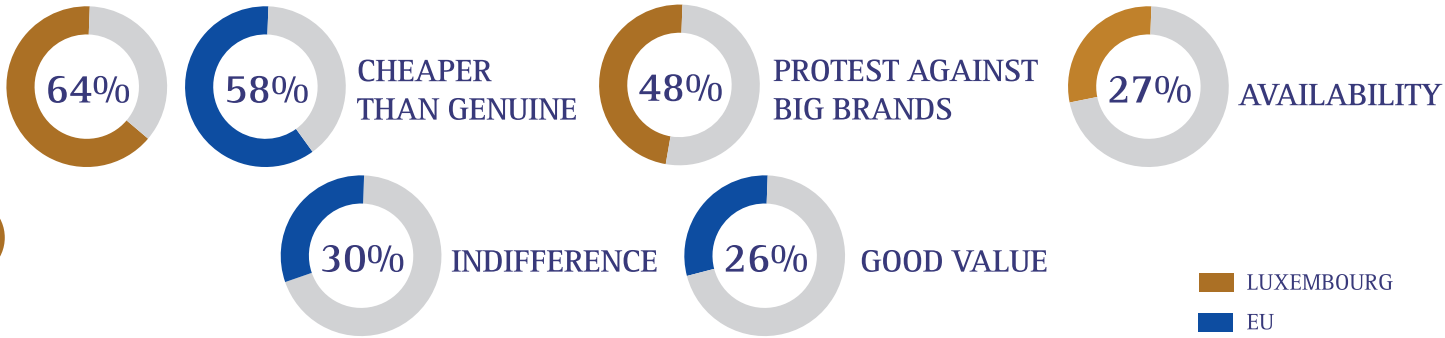
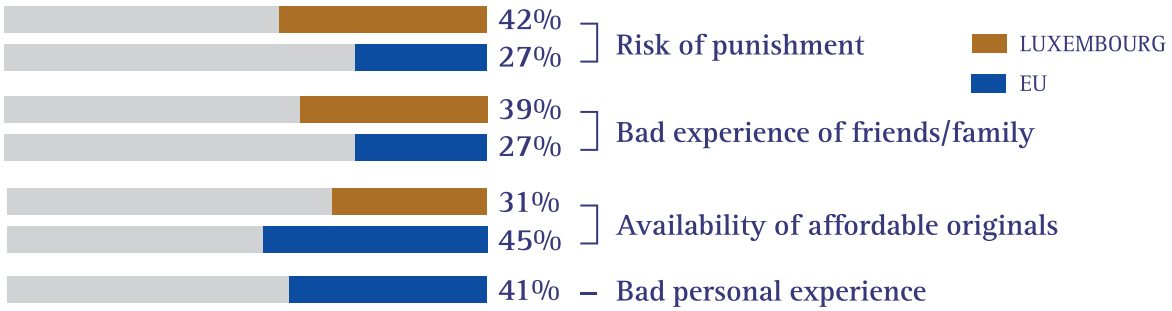


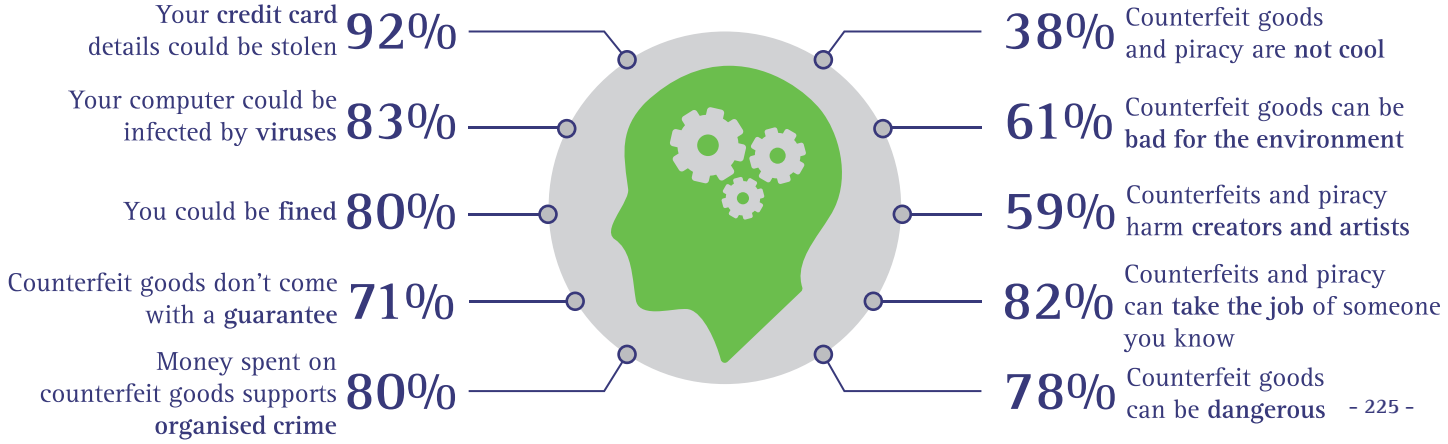
Main reasons to buy counterfeit goods online



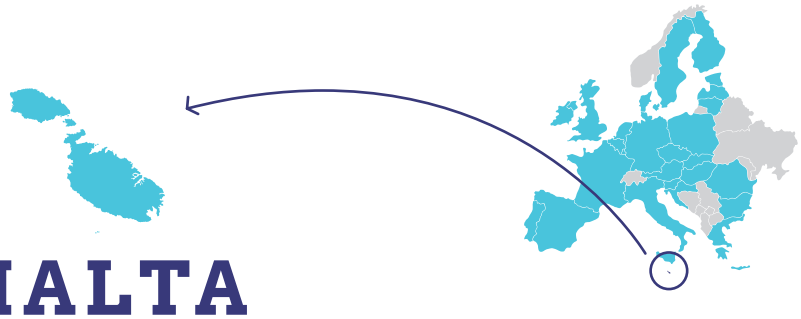
Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE



MALTA

- Youth IP perception and online behaviour -

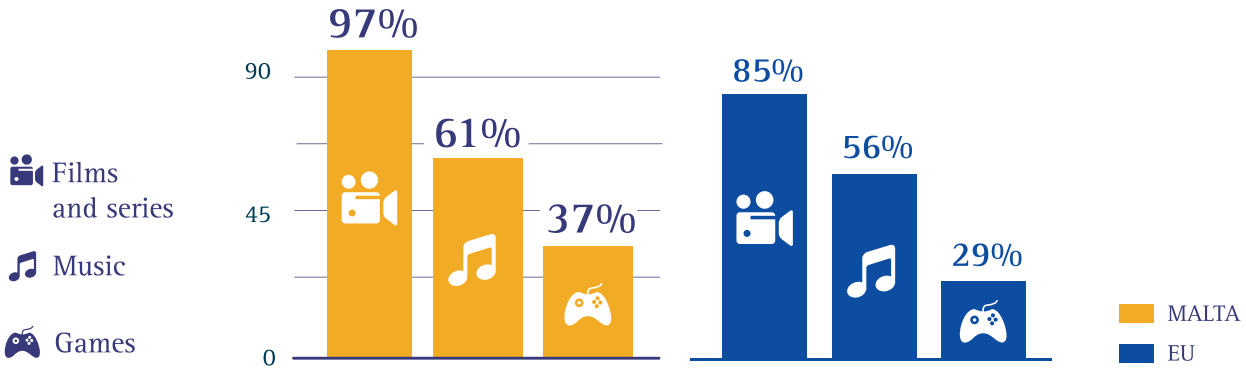
DIGITAL CONTENT

CONTENT

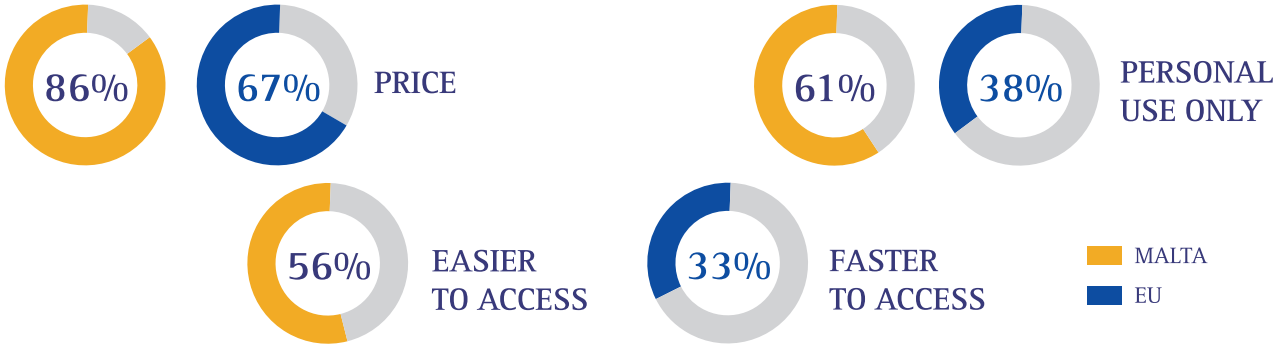
ONLINE

Usage of illegal sources

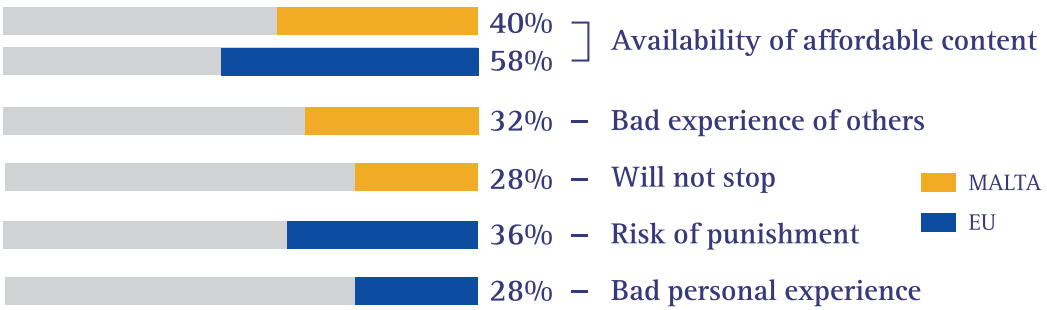
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

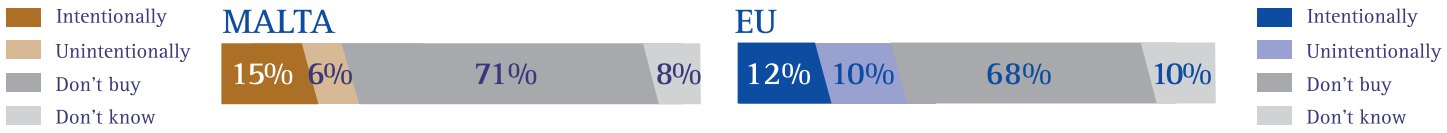
MALTA

PHYSICAL GOODS

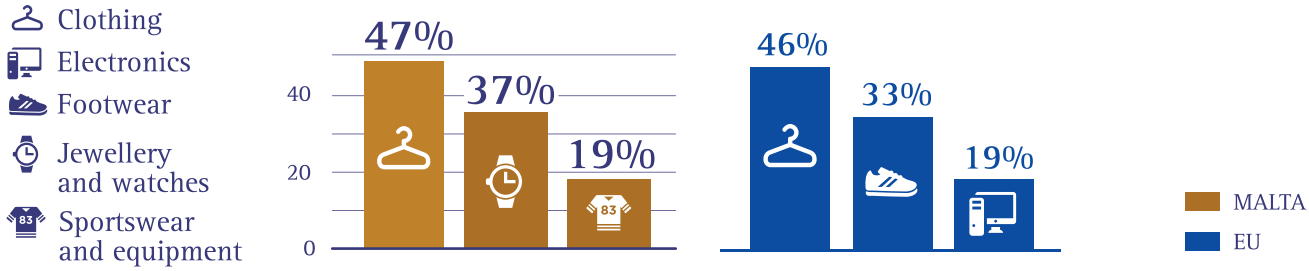
GOODS

PHYSICAL

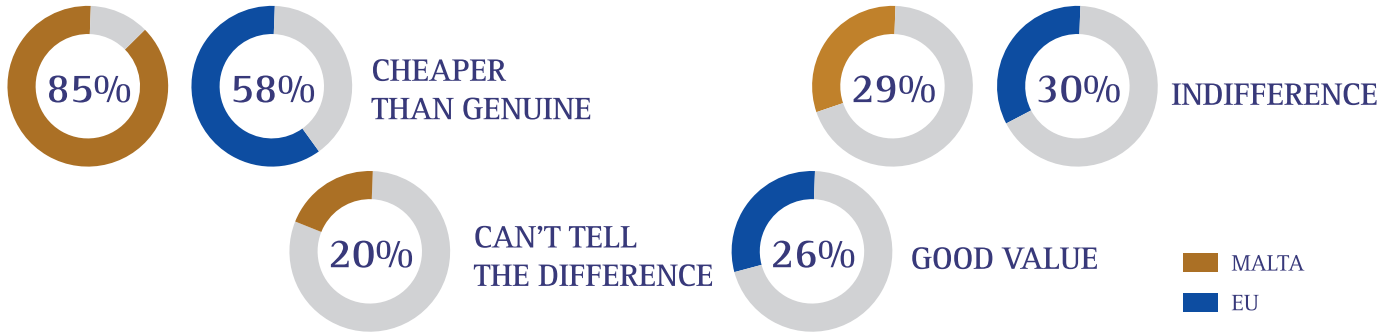
Bought counterfeit goods online



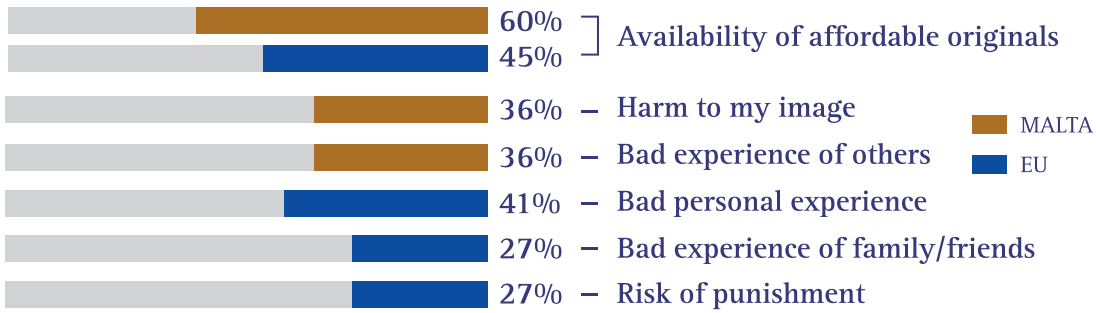
Main counterfeit goods purchased online



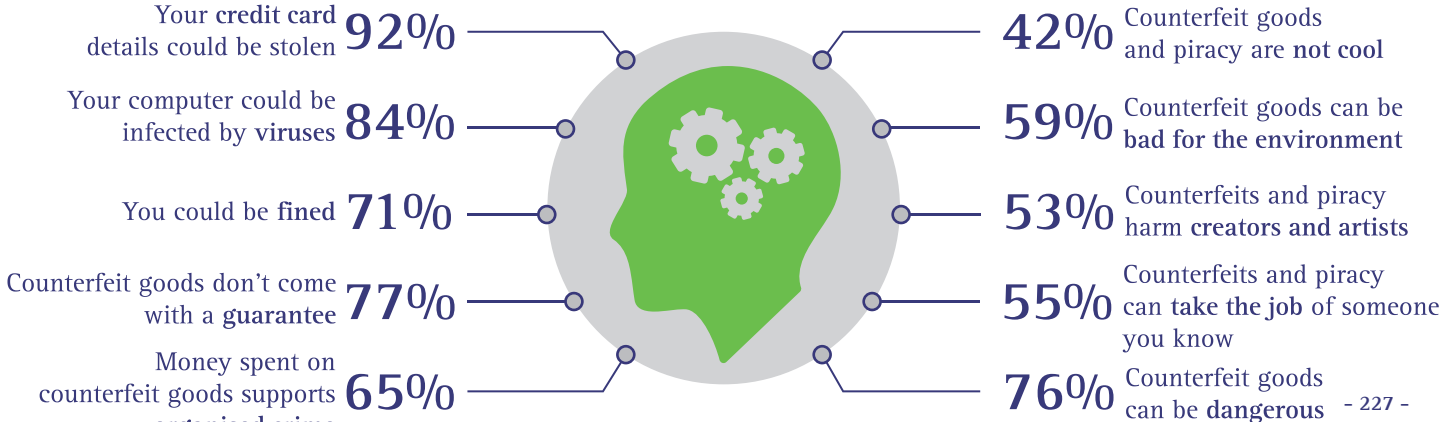
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

NETHERLANDS

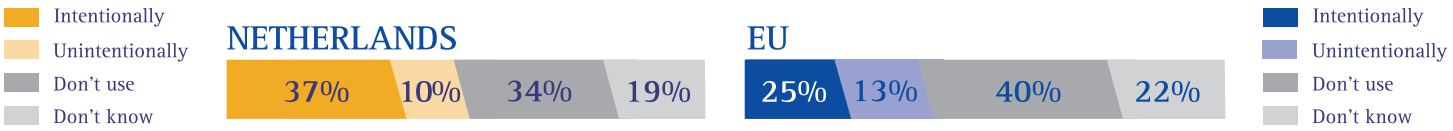
- Youth IP perception and online behaviour -

DIGITAL CONTENT

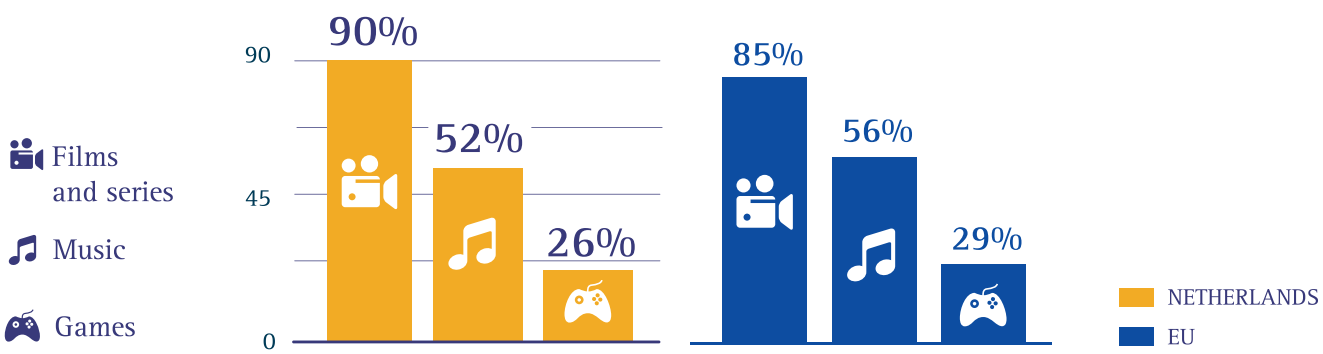
CONTENT

ONLINE

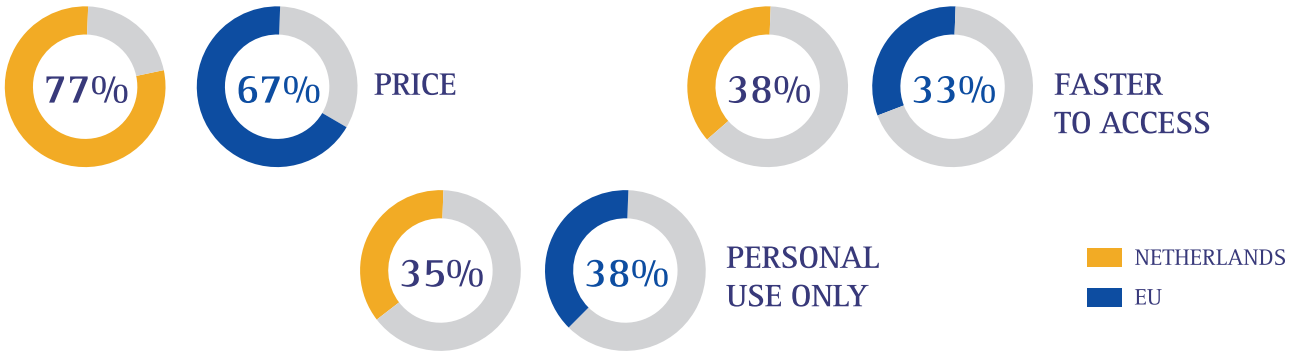
Usage of illegal sources



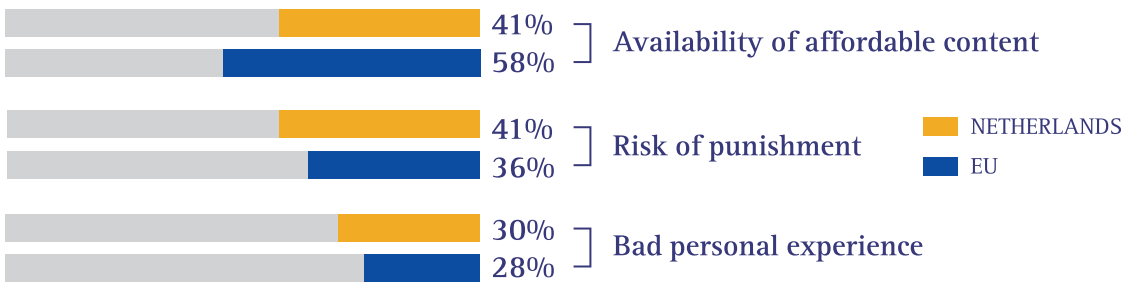
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

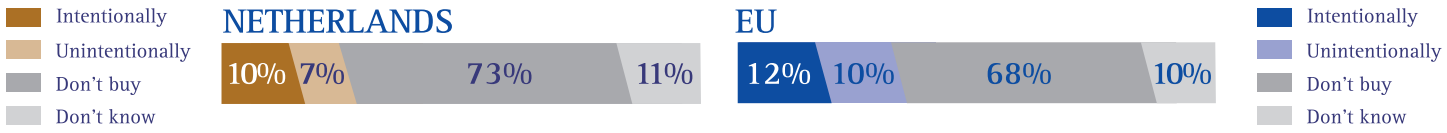
NETHERLANDS

PHYSICAL GOODS

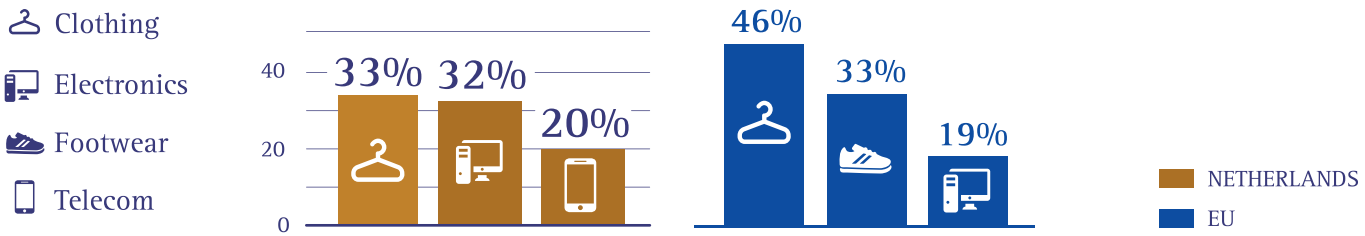
GOODS

PHYSICAL

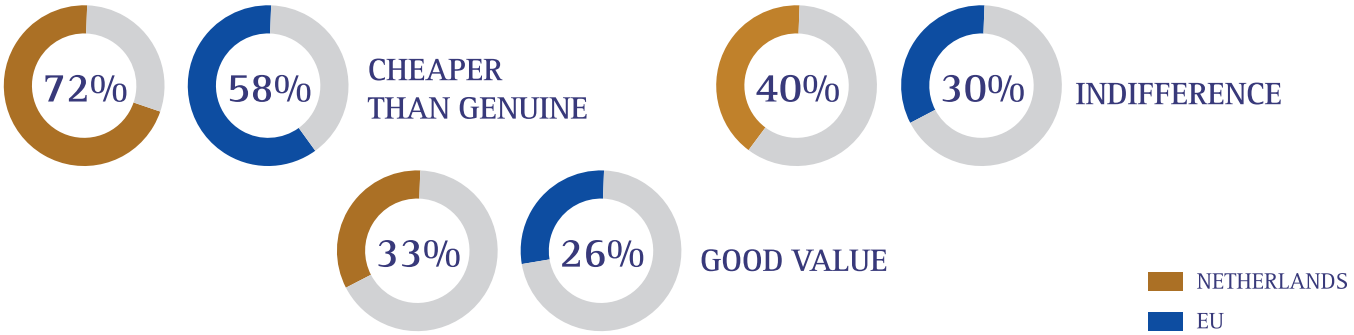
Bought counterfeit goods online



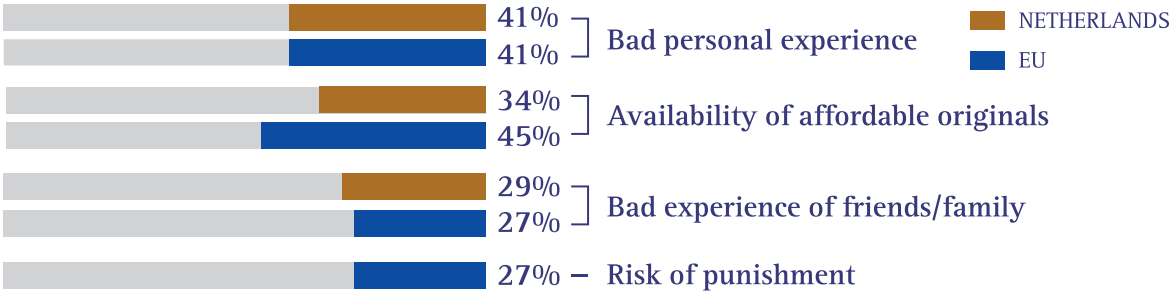
Main counterfeit goods purchased online



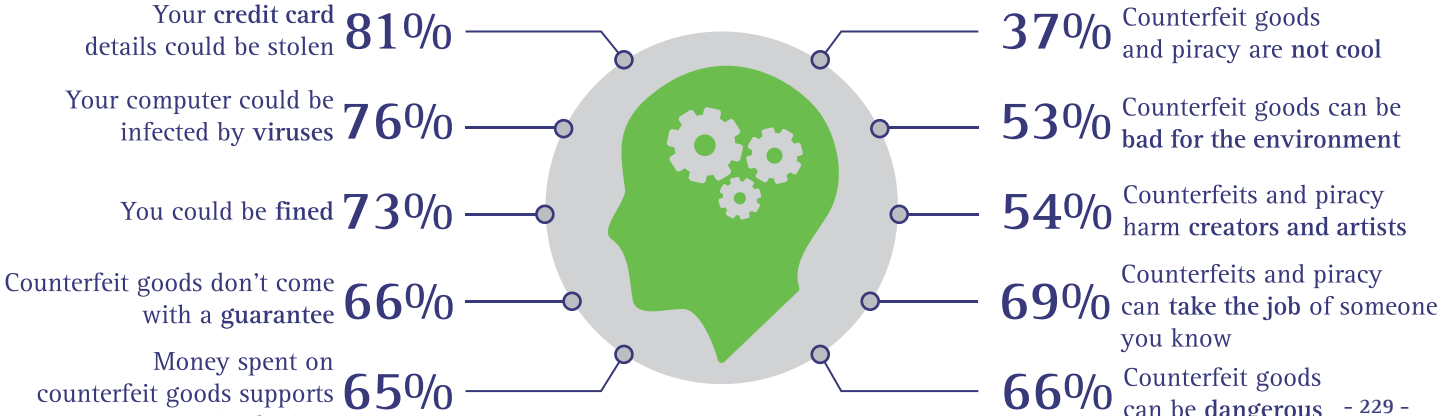
Main reasons to buy counterfeit goods online



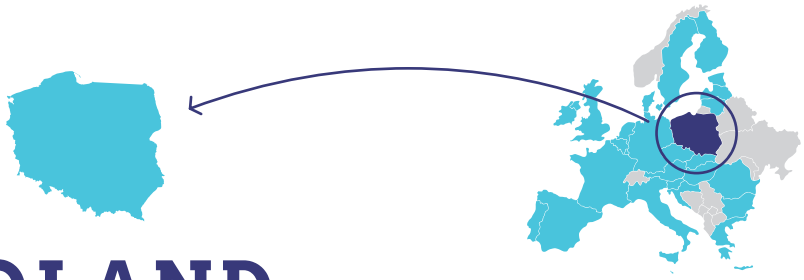
Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE



POLAND

- Youth IP perception and online behaviour -

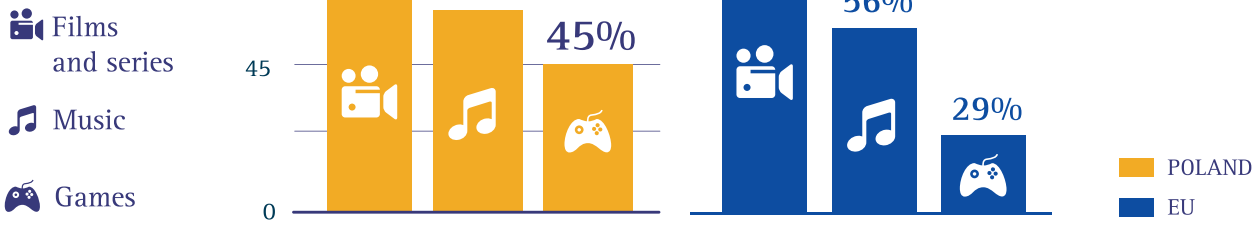
DIGITAL CONTENT

CONTENT

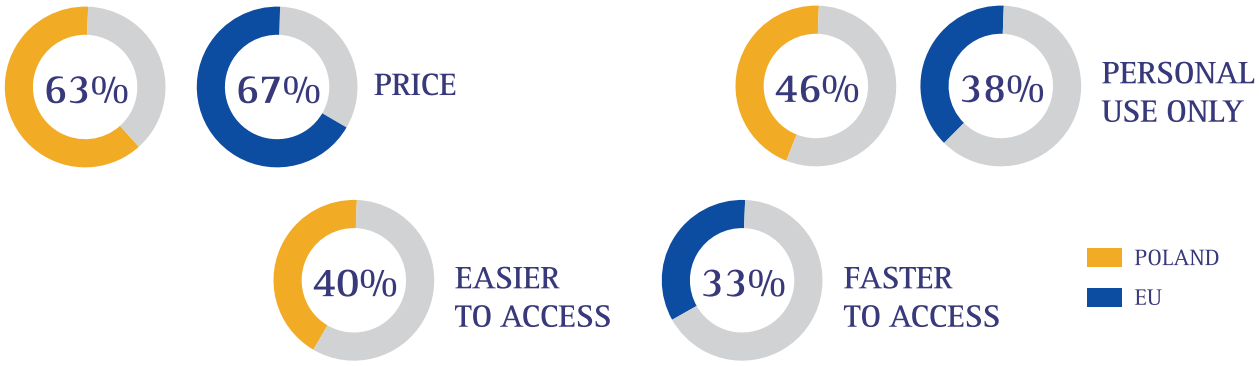
Usage of illegal sources

ONLINE

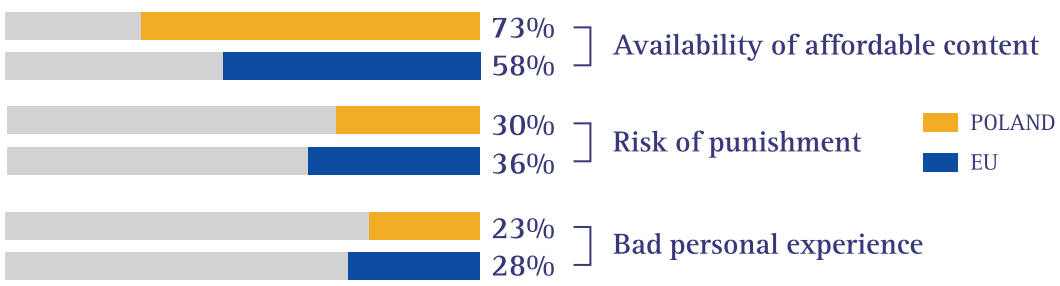
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

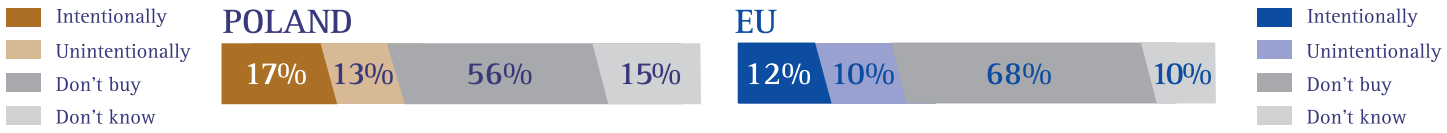
POLAND

PHYSICAL GOODS

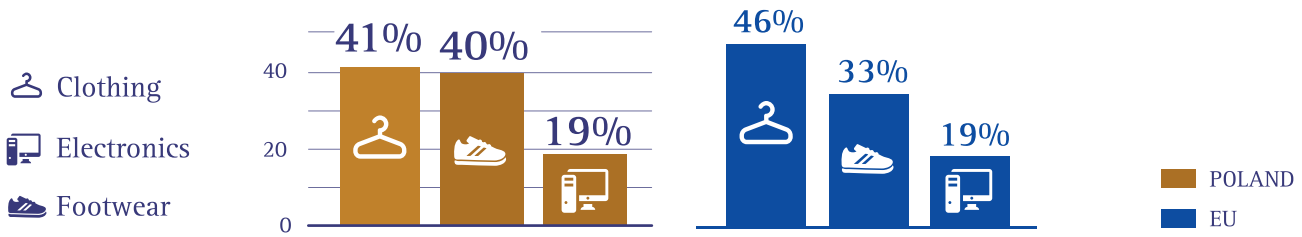
GOODS

PHYSICAL

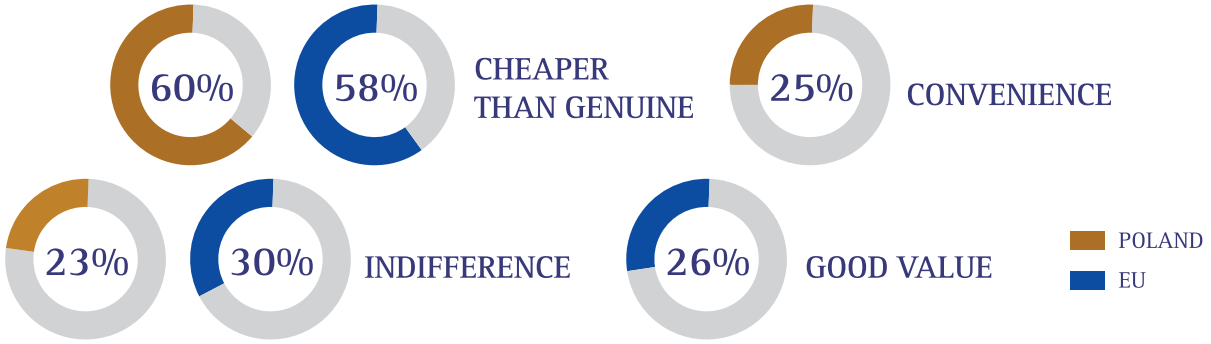
Bought counterfeit goods online



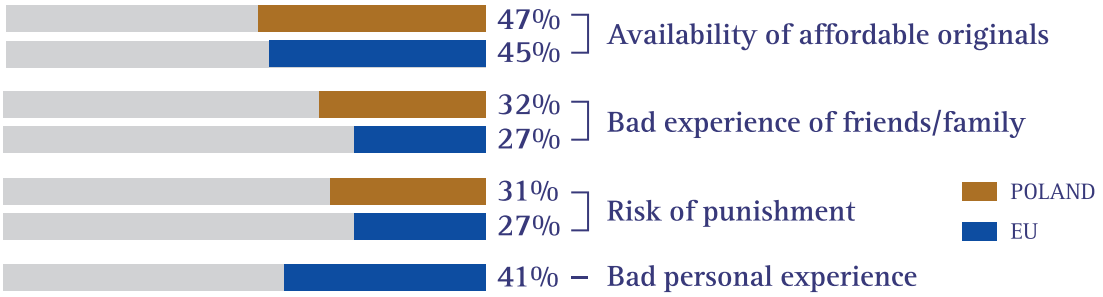
Main counterfeit goods purchased online



Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



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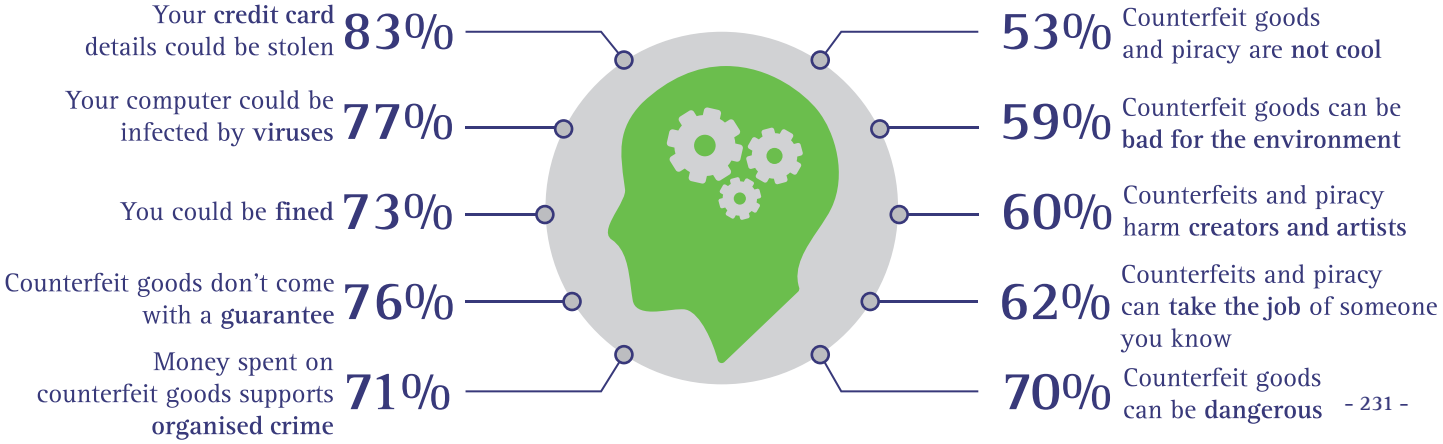


EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

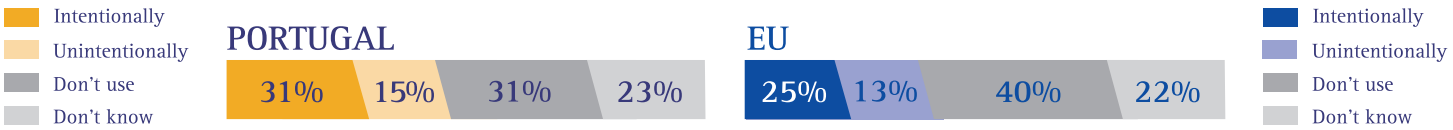
PORTUGAL

- Youth IP perception and online behaviour -

DIGITAL CONTENT

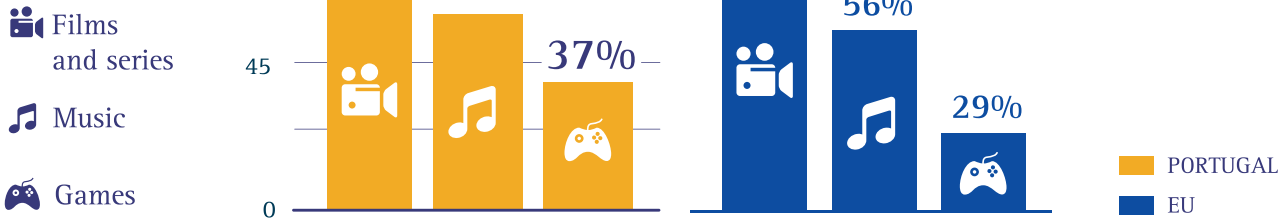
CONTENT

Usage of illegal sources

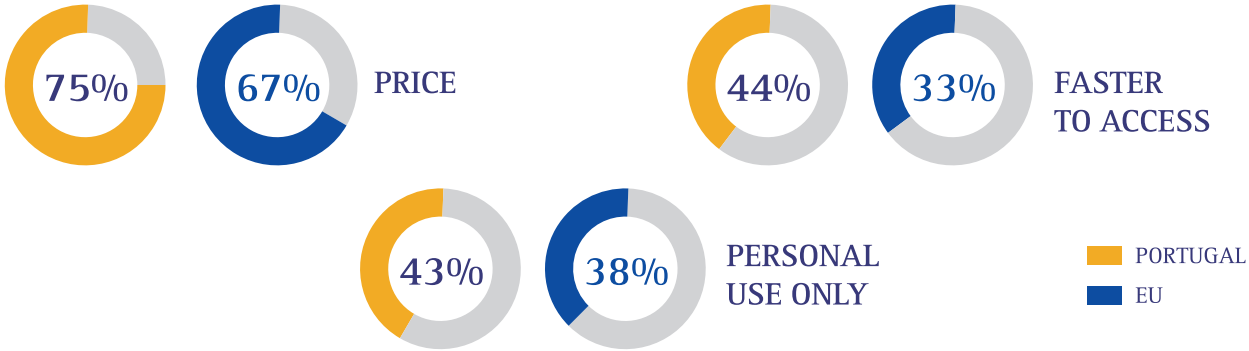


Main digital content accessed from illegal sources

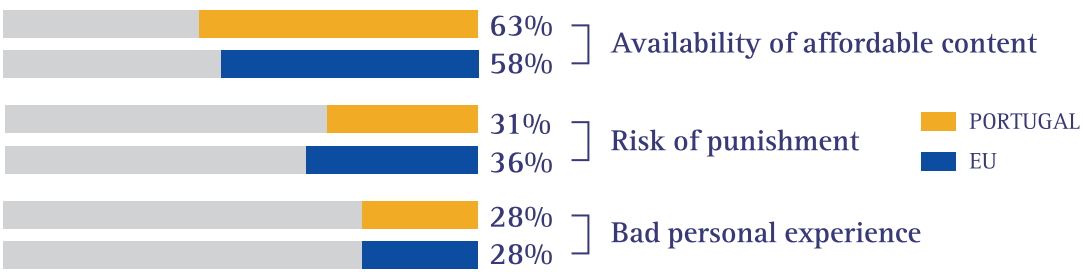
ONLINE



Main reasons to choose illegal sources



Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

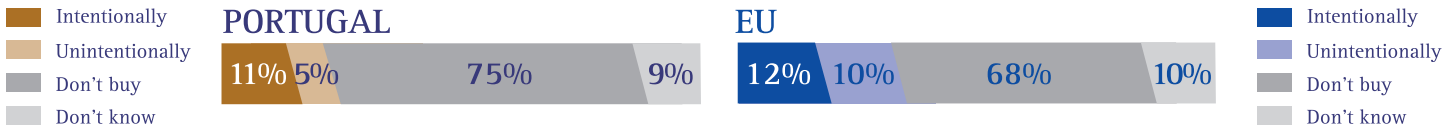
PORTUGAL

PHYSICAL GOODS

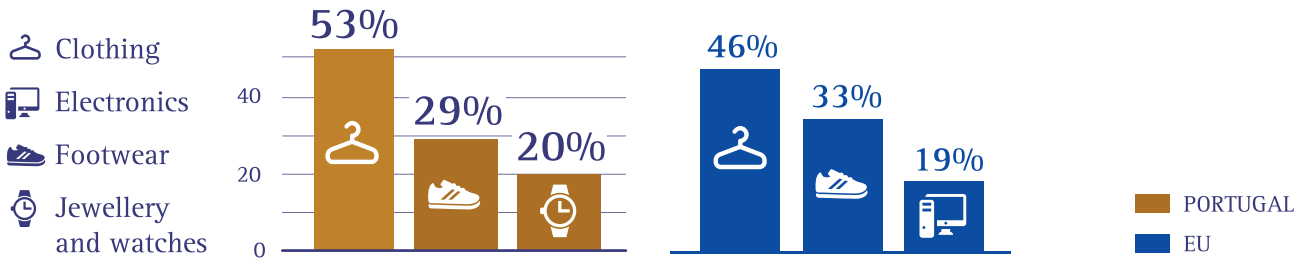
GOODS

PHYSICAL

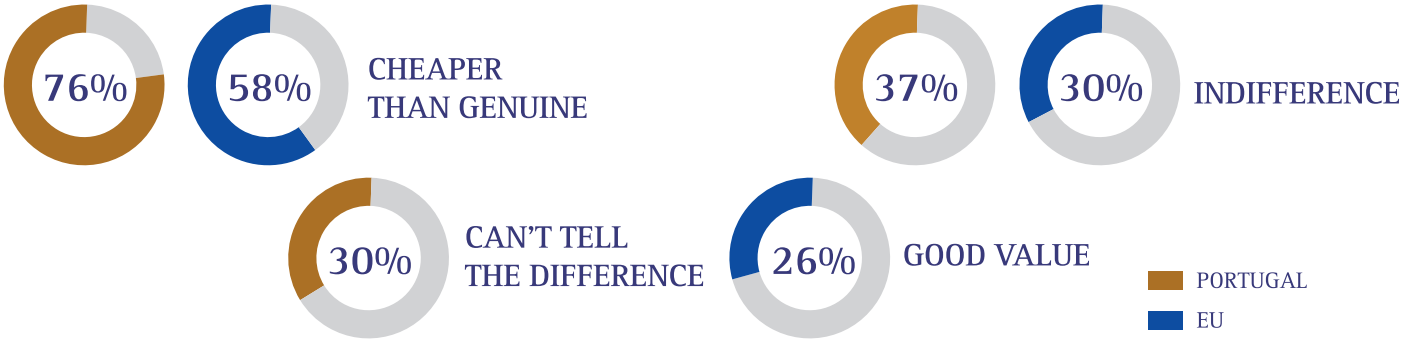
Bought counterfeit goods online



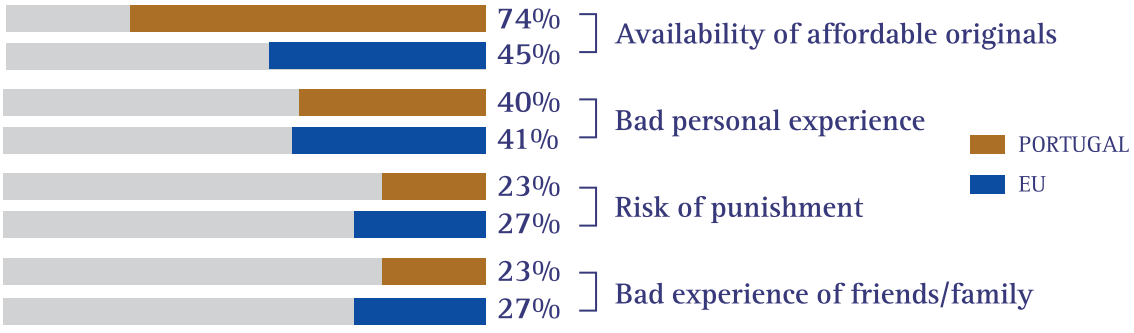
Main counterfeit goods purchased online



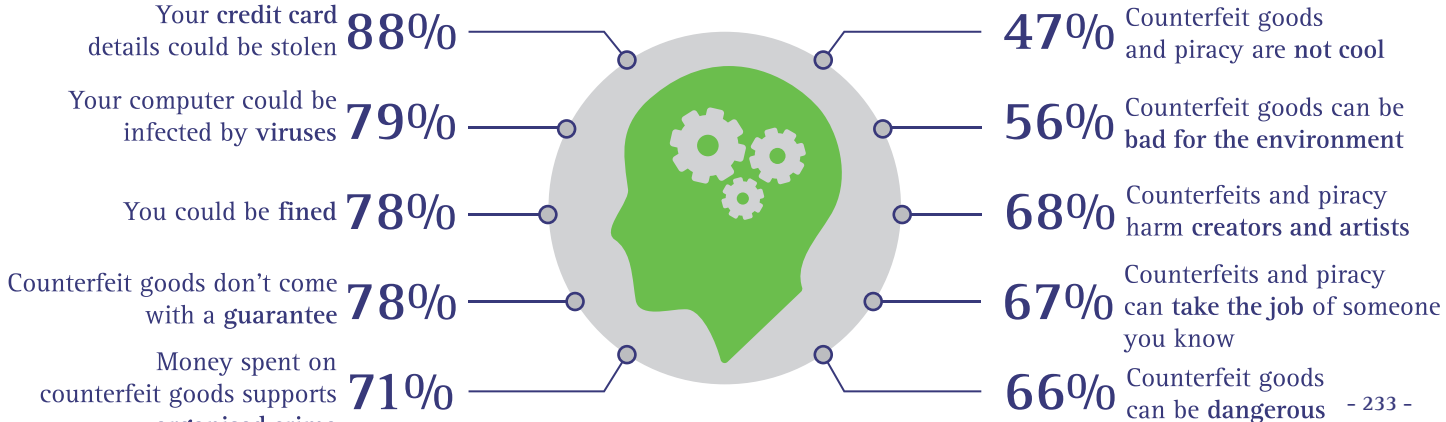
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

ROMANIA

- Youth IP perception and online behaviour -

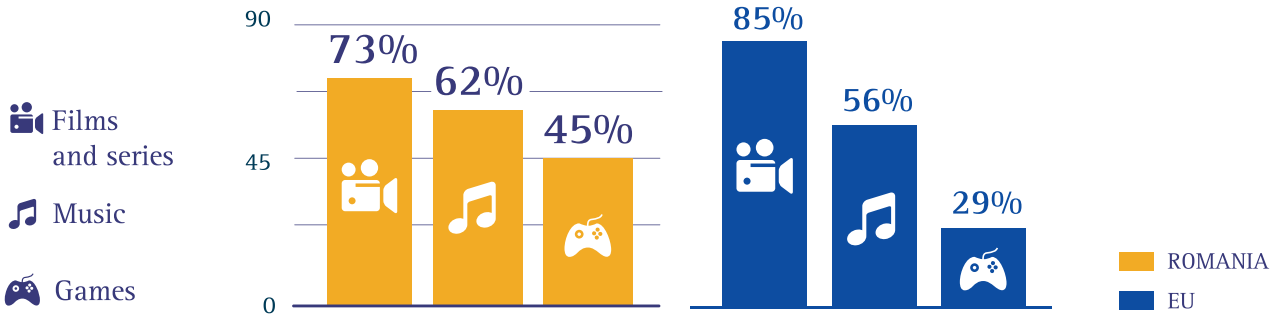
DIGITAL CONTENT

CONTENT

Usage of illegal sources

Main digital content accessed from illegal sources

ONLINE



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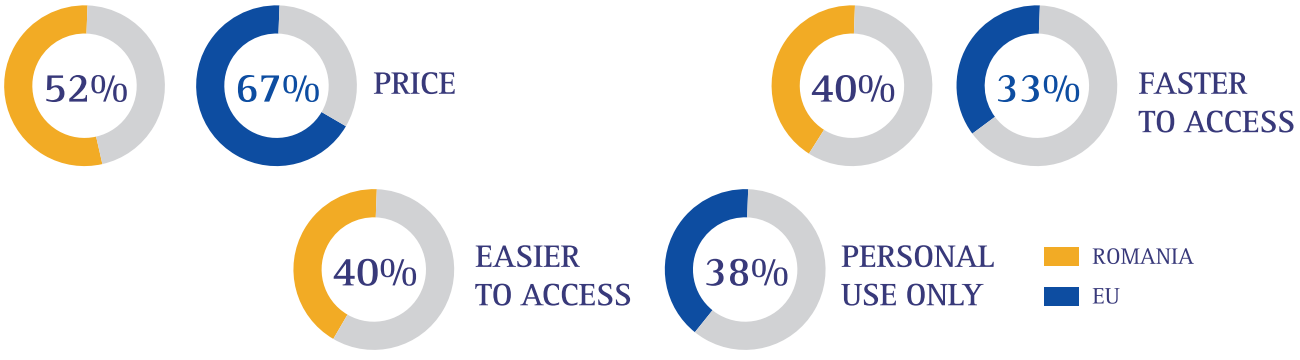
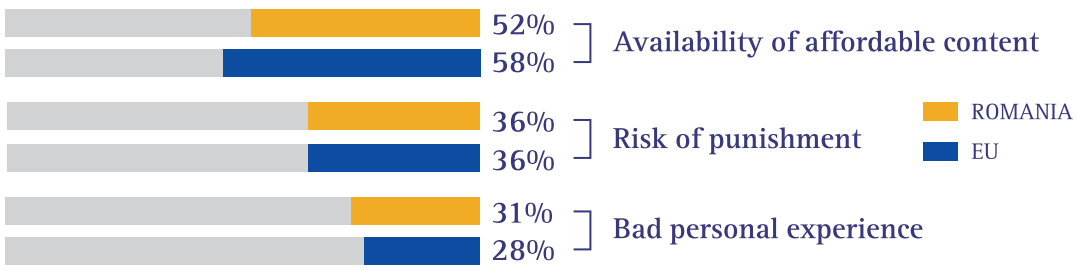


Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

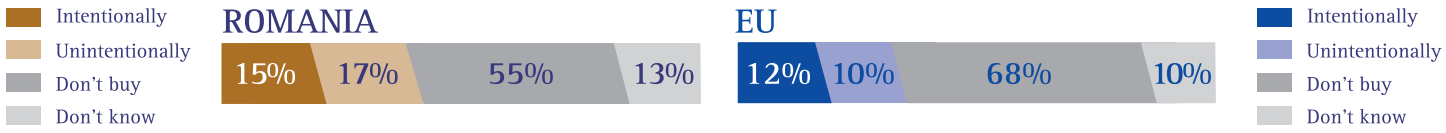
ROMANIA

PHYSICAL GOODS

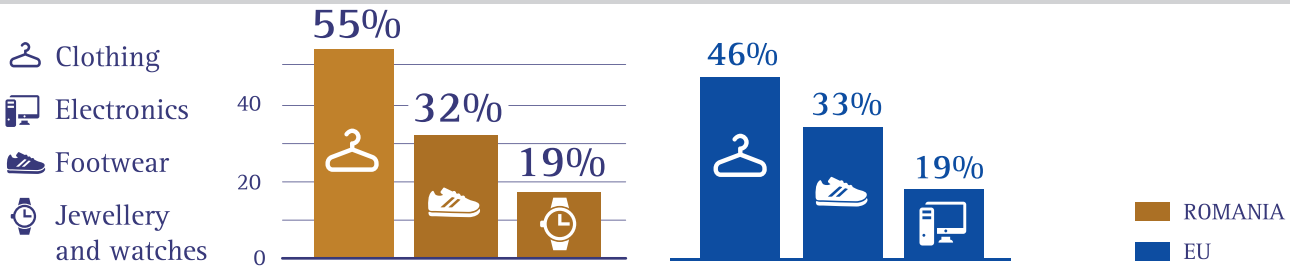
GOODS

PHYSICAL

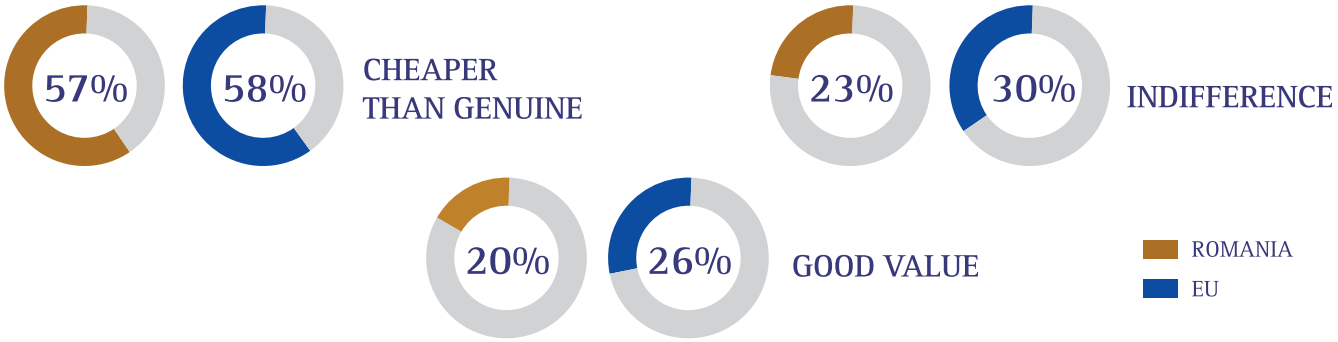
Bought counterfeit goods online



Main counterfeit goods purchased online



Main reasons to buy counterfeit goods online



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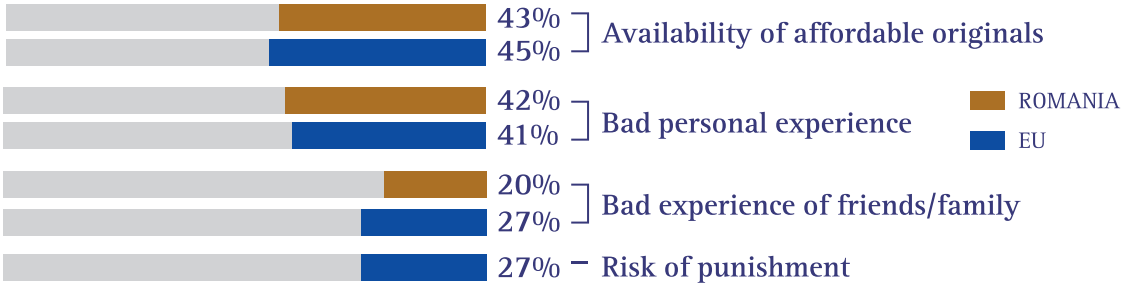
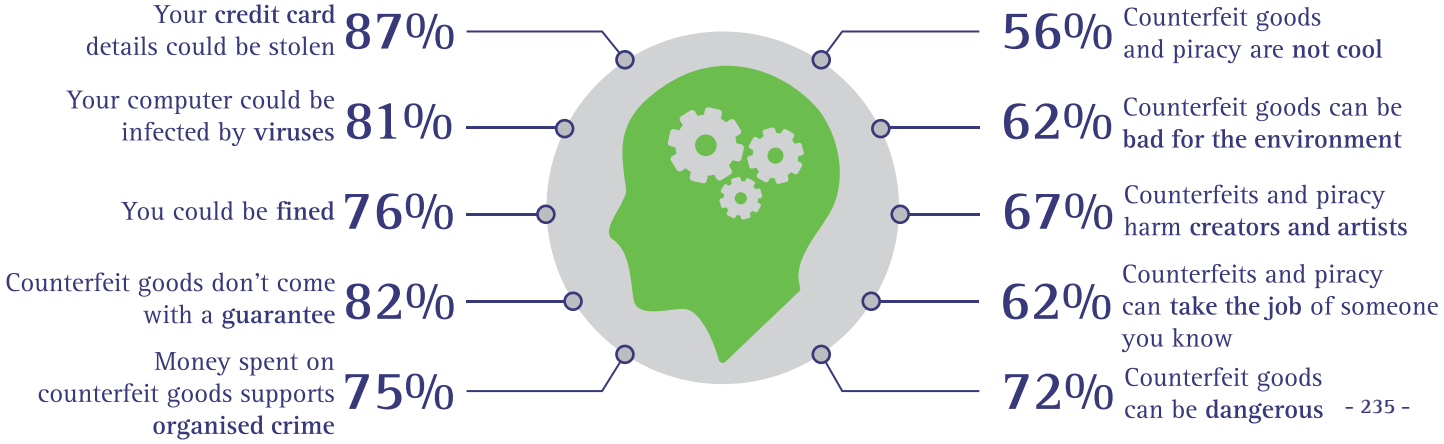


COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

SLOVAKIA

- Youth IP perception and online behaviour -

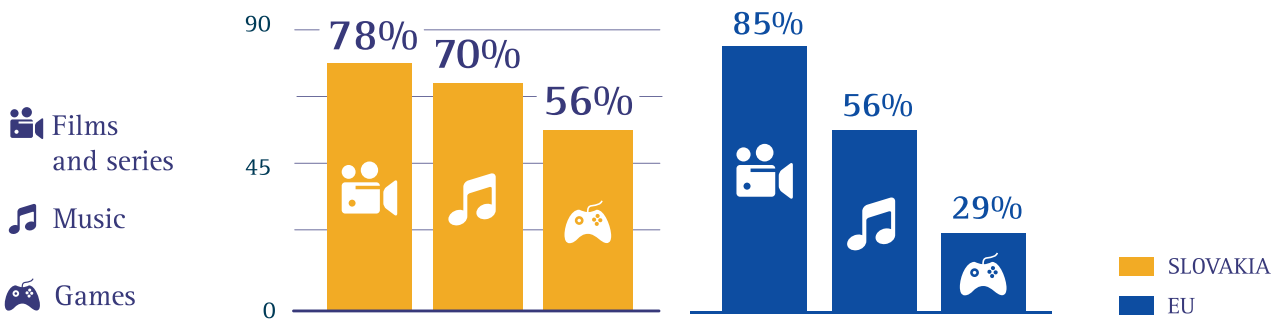
DIGITAL CONTENT

CONTENT

ONLINE

Usage of illegal sources

Main digital content accessed from illegal sources



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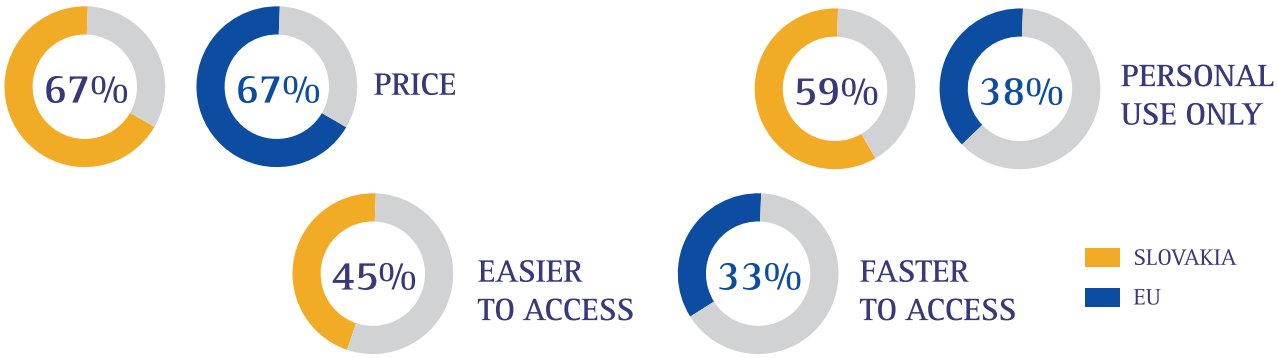
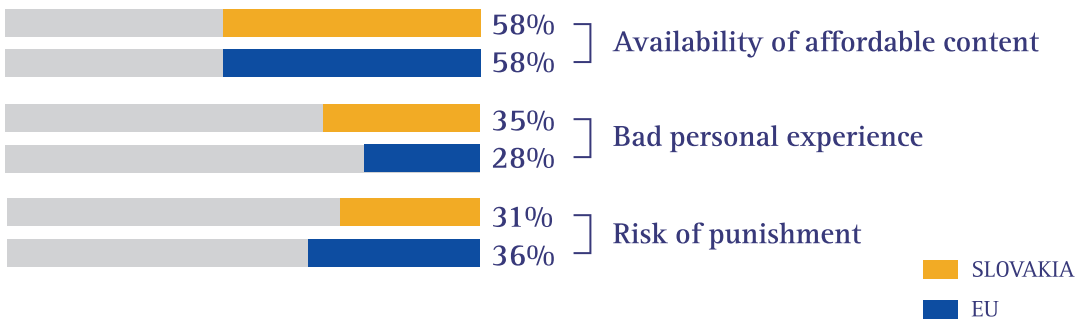


Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

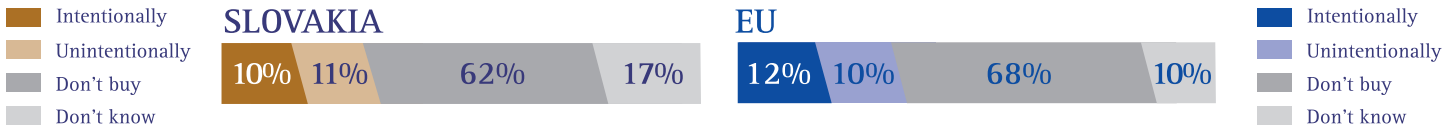
SLOVAKIA

PHYSICAL GOODS

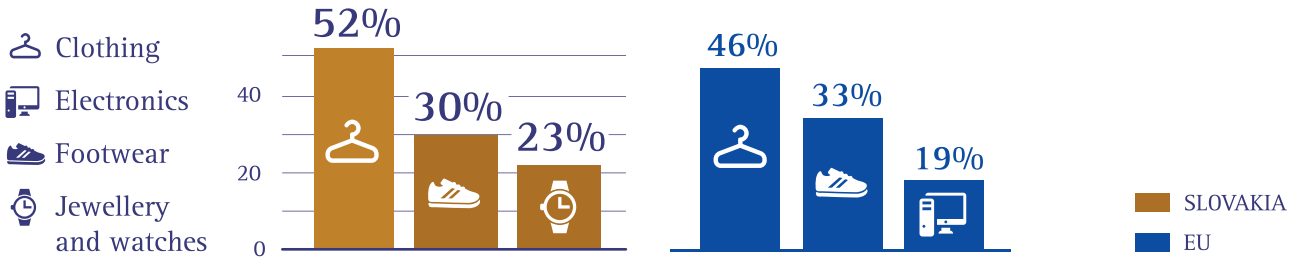
GOODS

PHYSICAL

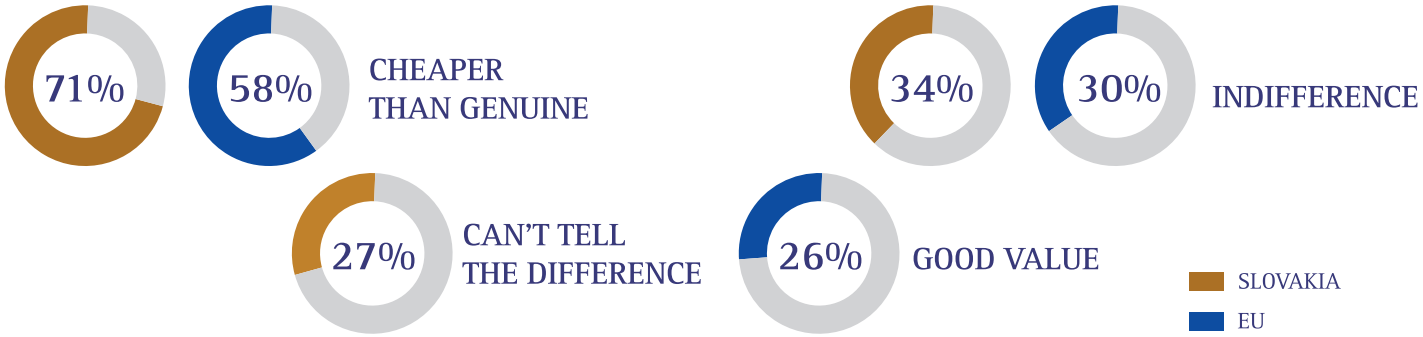
Bought counterfeit goods online



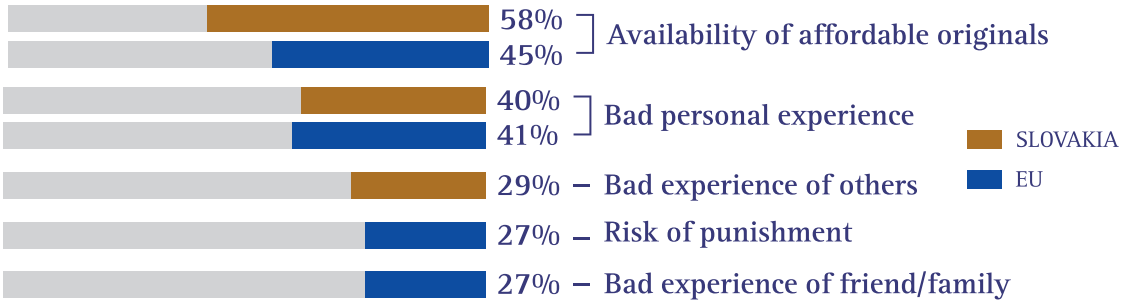
Main counterfeit goods purchased online



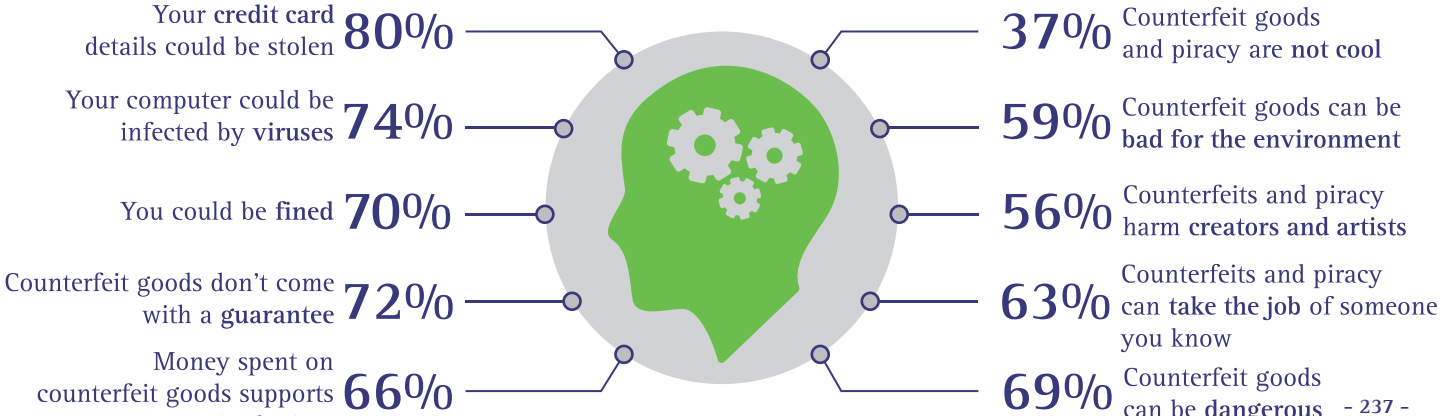
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

SLOVENIA

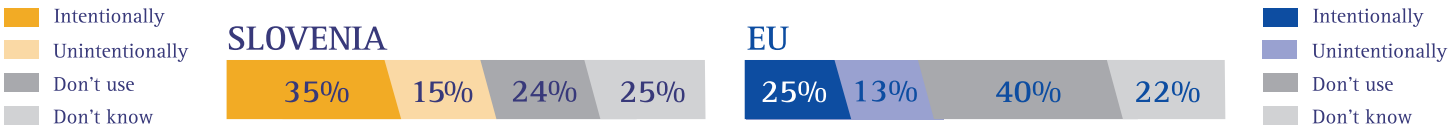
- Youth IP perception and online behaviour -

DIGITAL CONTENT

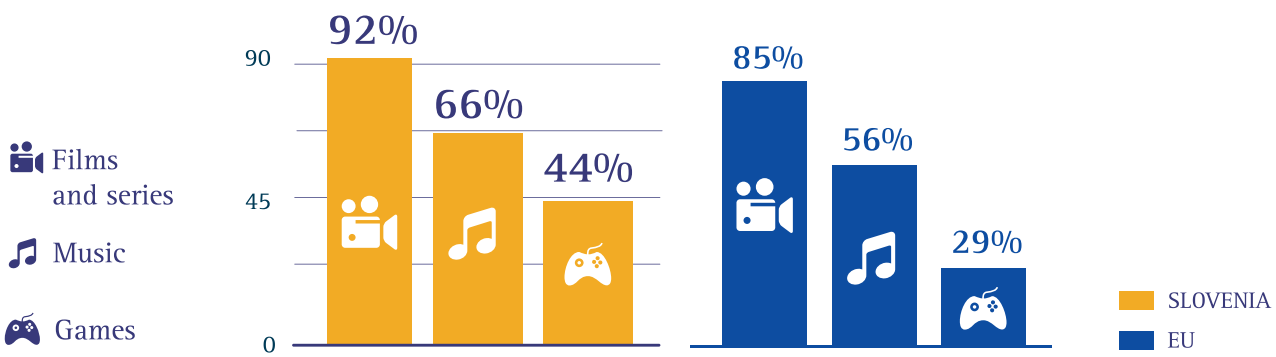
CONTENT

ONLINE

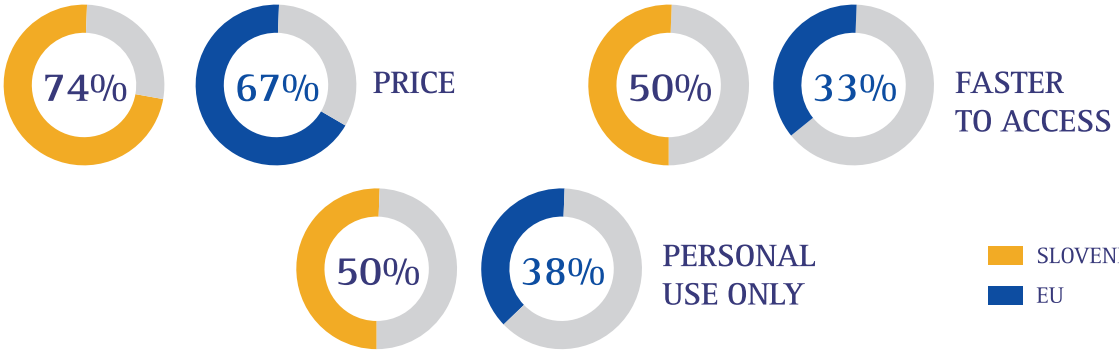
Usage of illegal sources



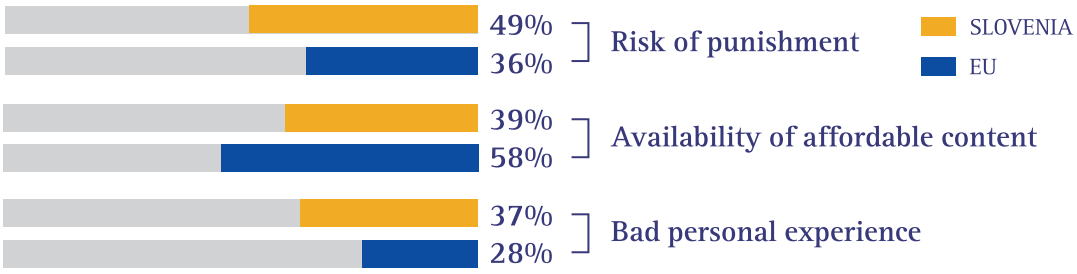
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

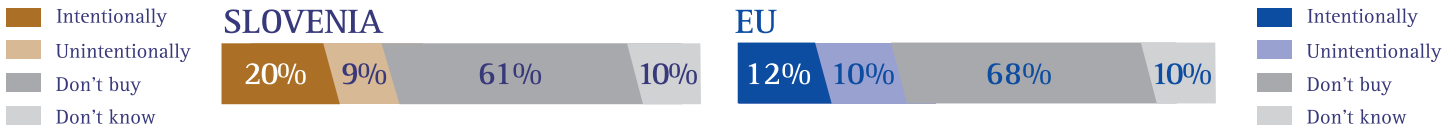
SLOVENIA

PHYSICAL GOODS

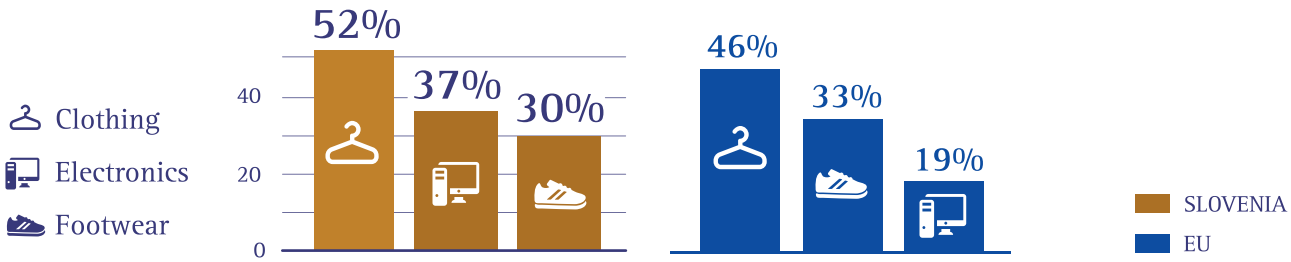
GOODS

PHYSICAL

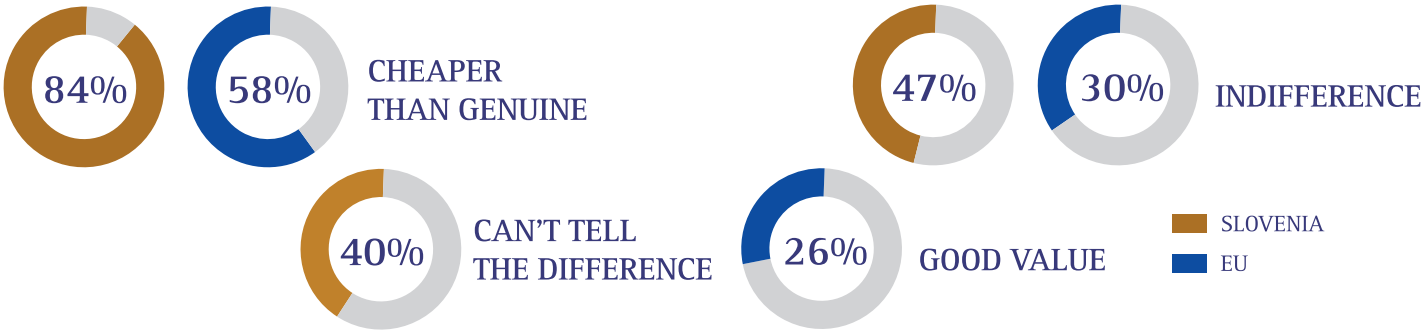
Bought counterfeit goods online



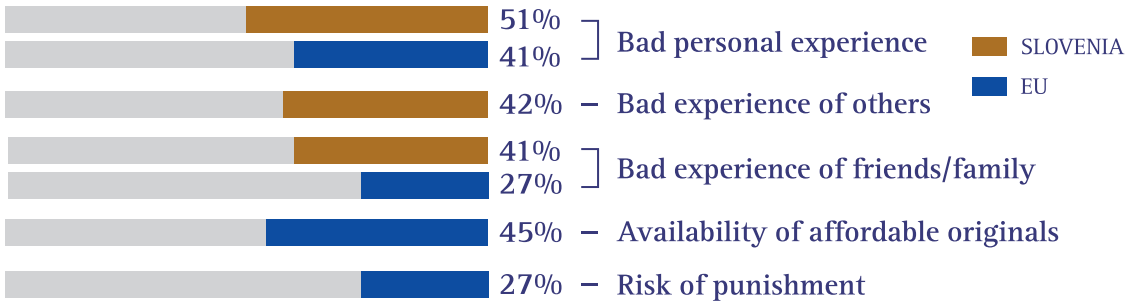
Main counterfeit goods purchased online



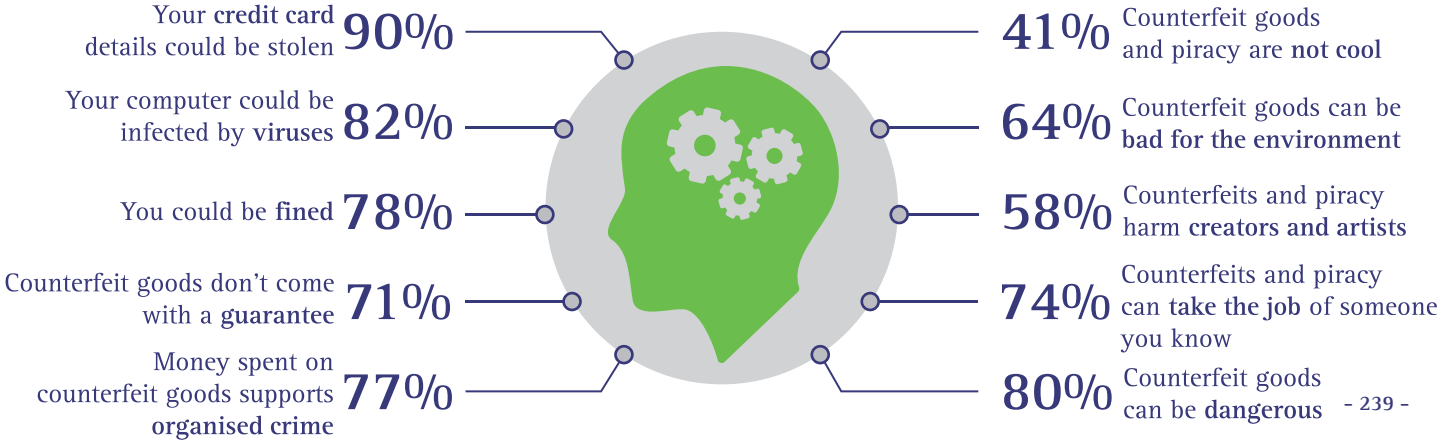
Main reasons to buy counterfeit goods online



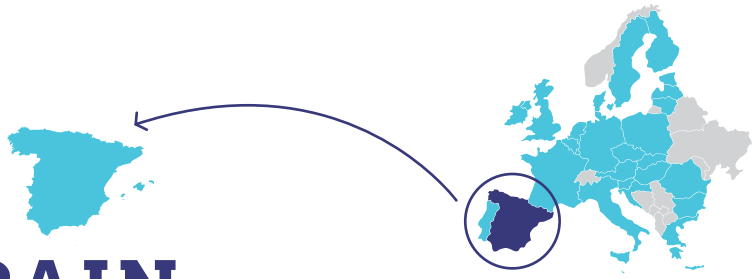
Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE



SPAIN

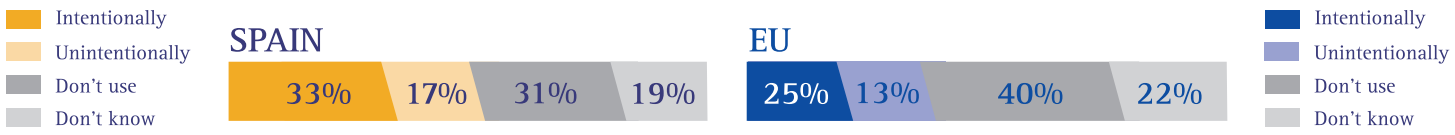
- Youth IP perception and online behaviour -

DIGITAL CONTENT

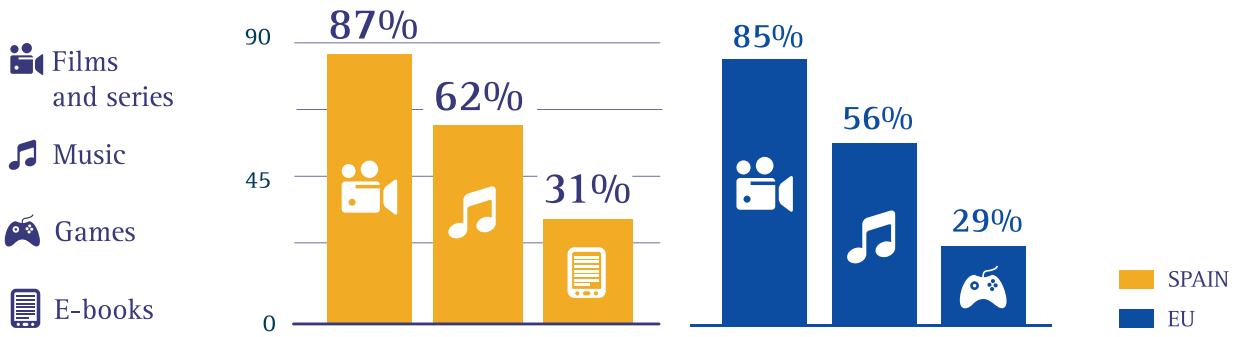
CONTENT

ONLINE

Usage of illegal sources

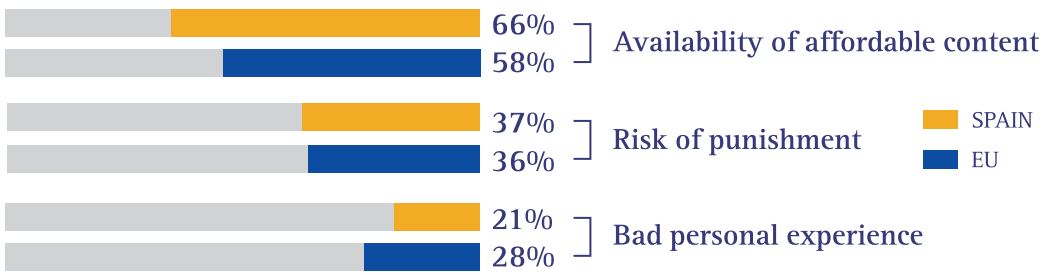


Main digital content accessed from illegal sources



Main reasons to choose illegal sources

Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

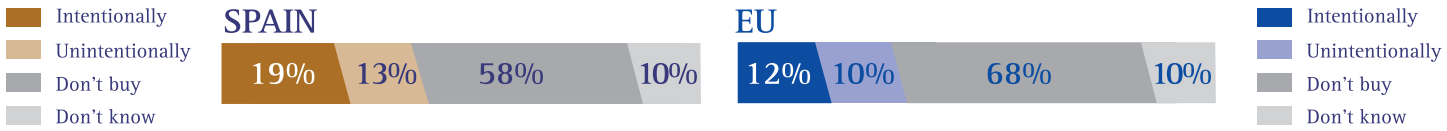
SPAIN

PHYSICAL GOODS

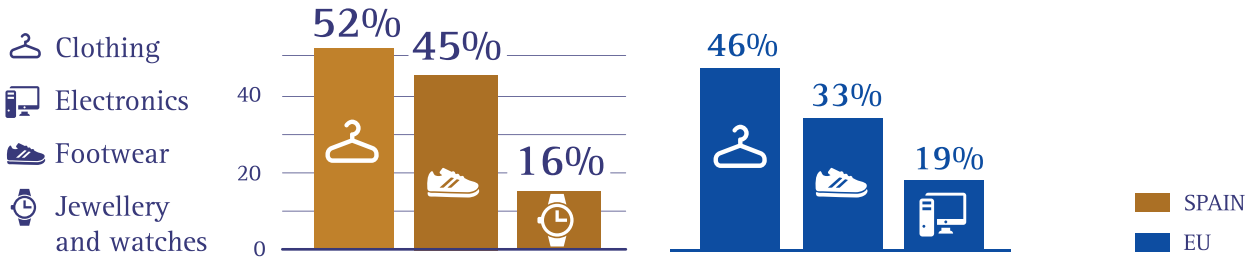
GOODS

PHYSICAL

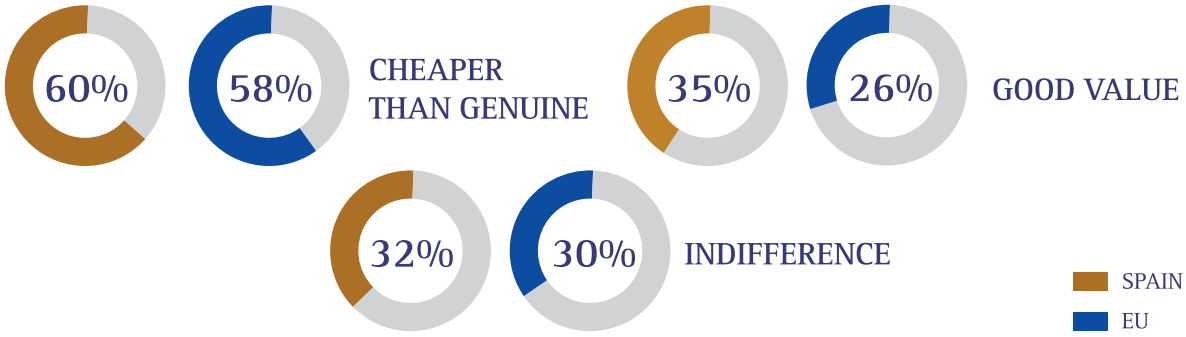
Bought counterfeit goods online



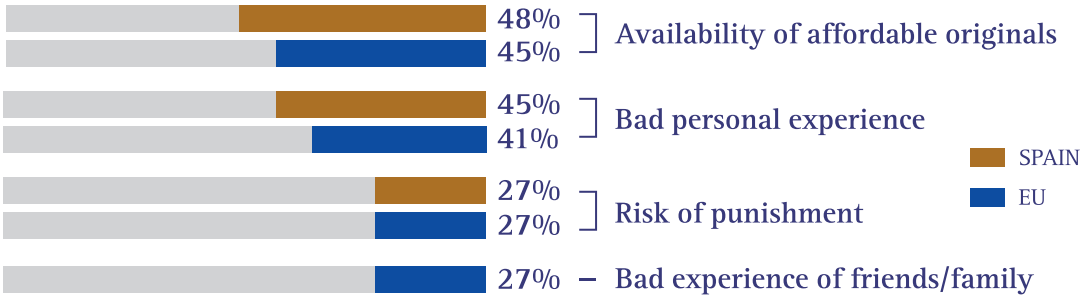
Main counterfeit goods purchased online



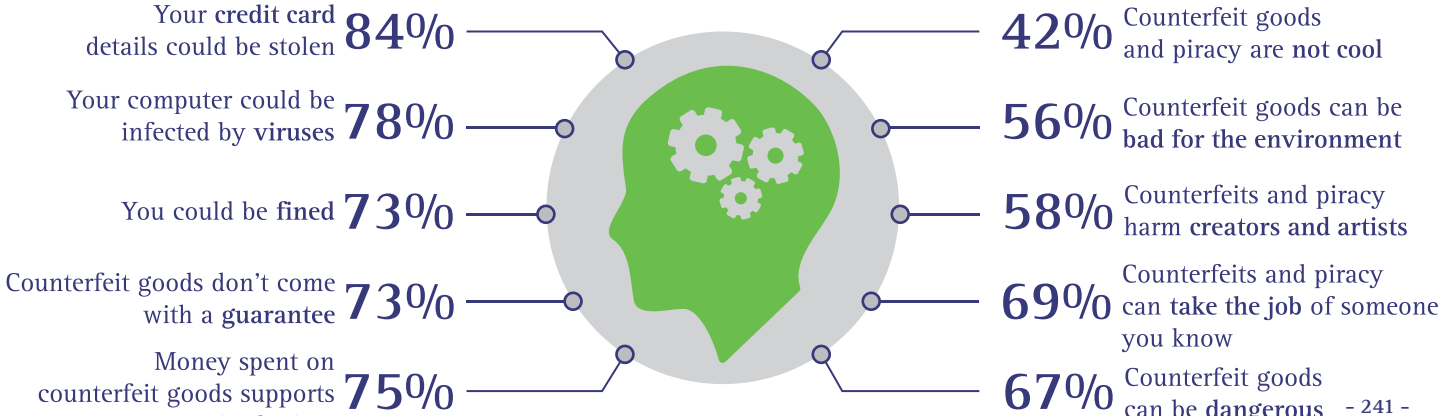
Main reasons to buy counterfeit goods online



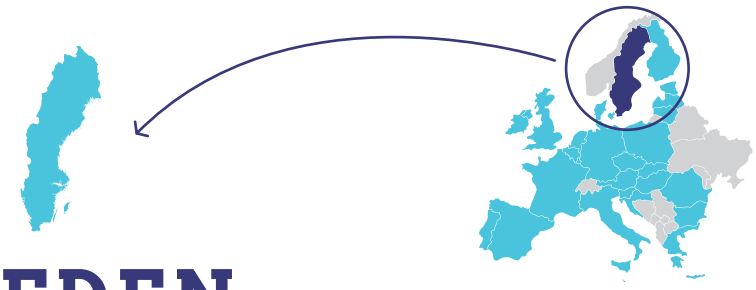
Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE



SWEDEN

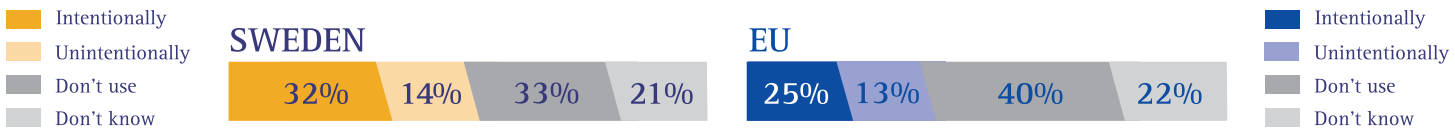
- Youth IP perception and online behaviour -

DIGITAL CONTENT

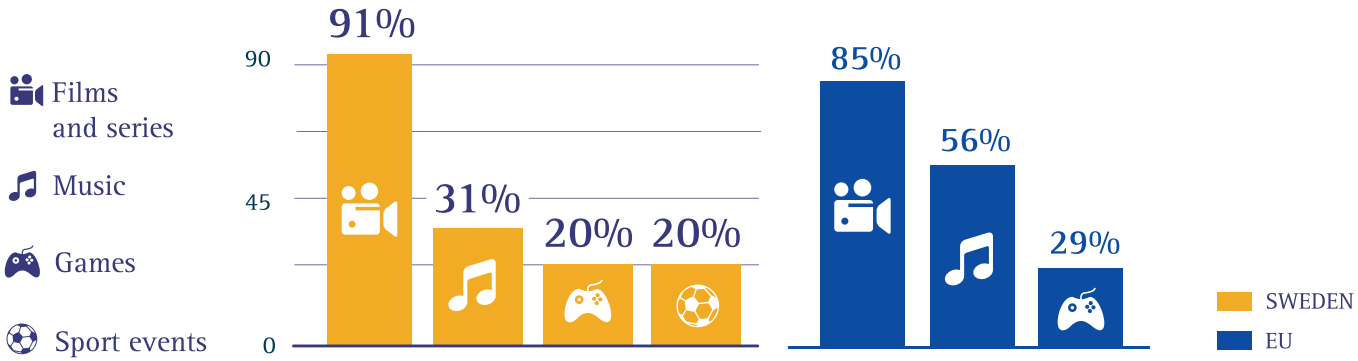
CONTENT

ONLINE

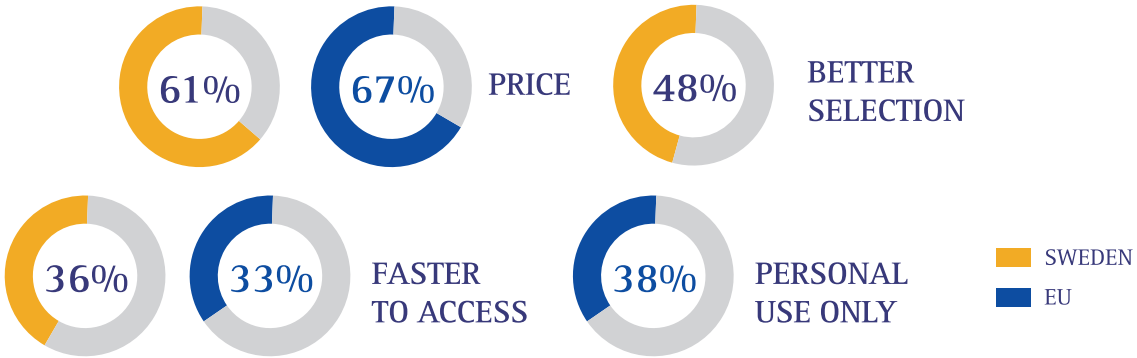
Usage of illegal sources



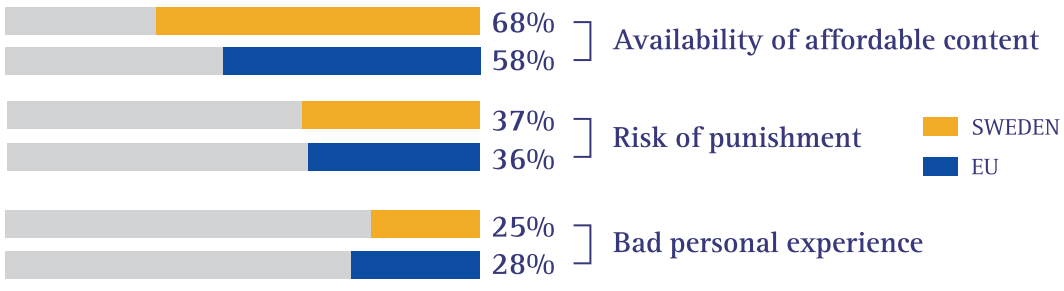
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

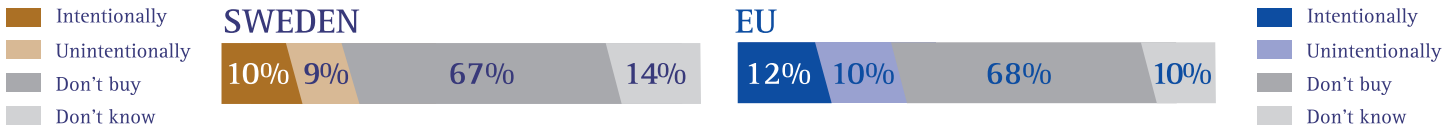
SWEDEN

PHYSICAL GOODS

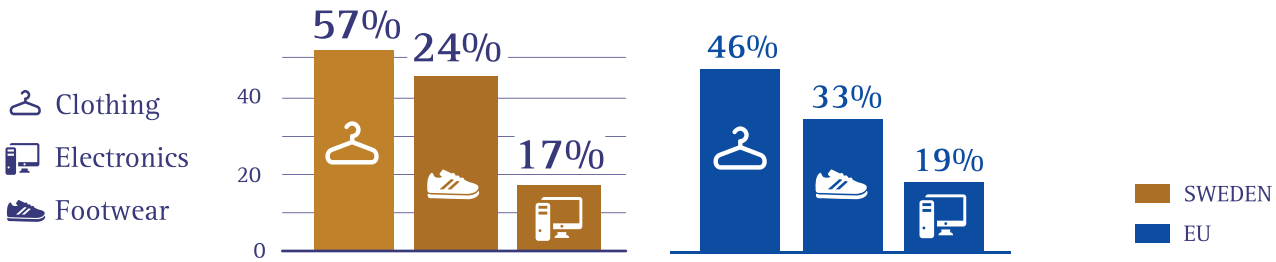
GOODS

PHYSICAL

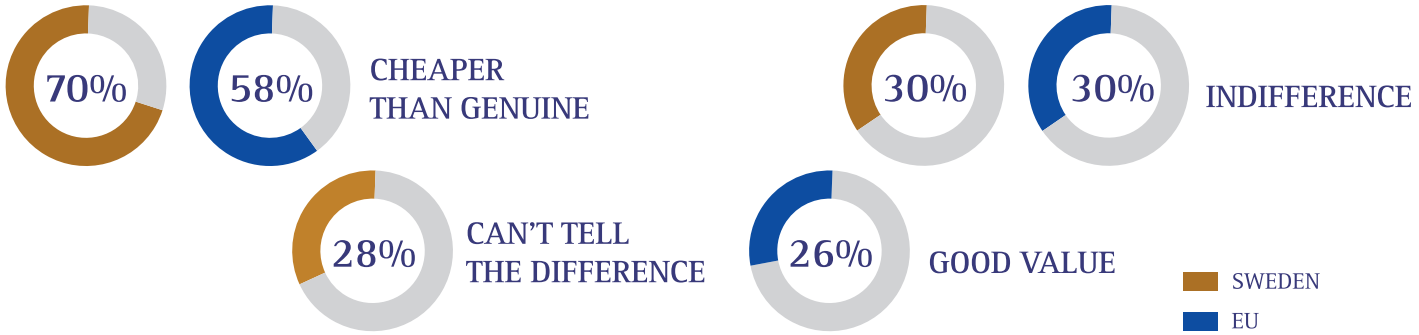
Bought counterfeit goods online



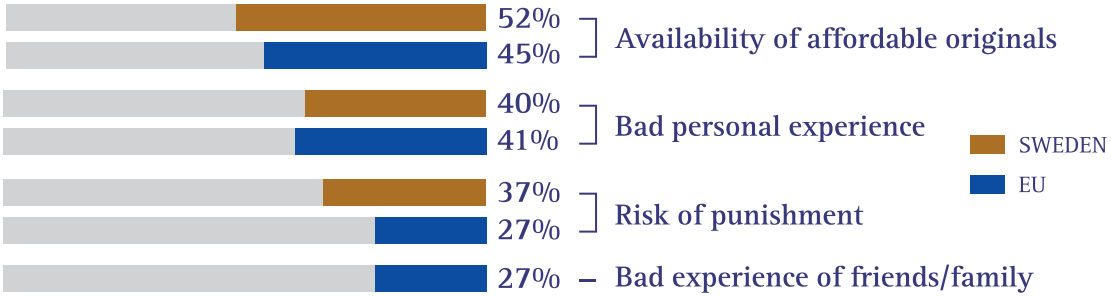
Main counterfeit goods purchased online



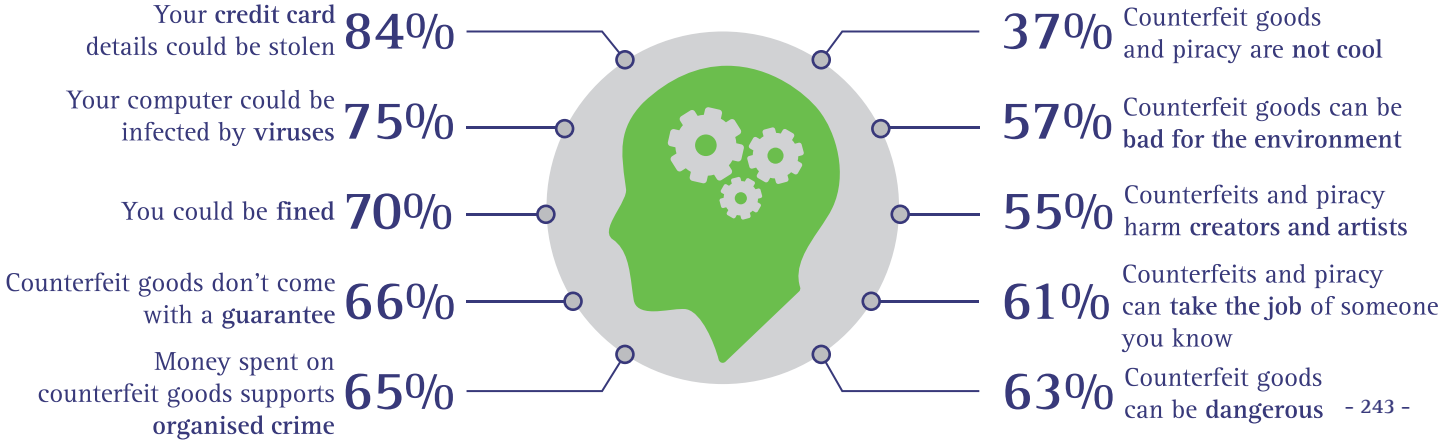
Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING



EUIPO
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

UNITED KINGDOM

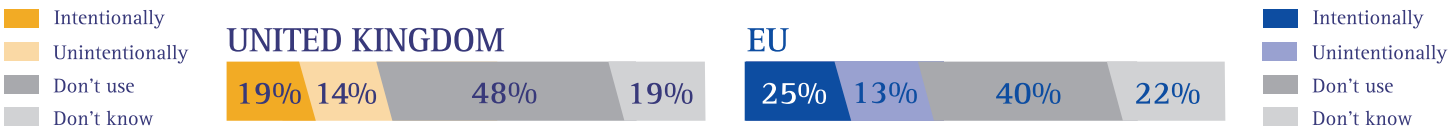
- Youth IP perception and online behaviour -

DIGITAL CONTENT

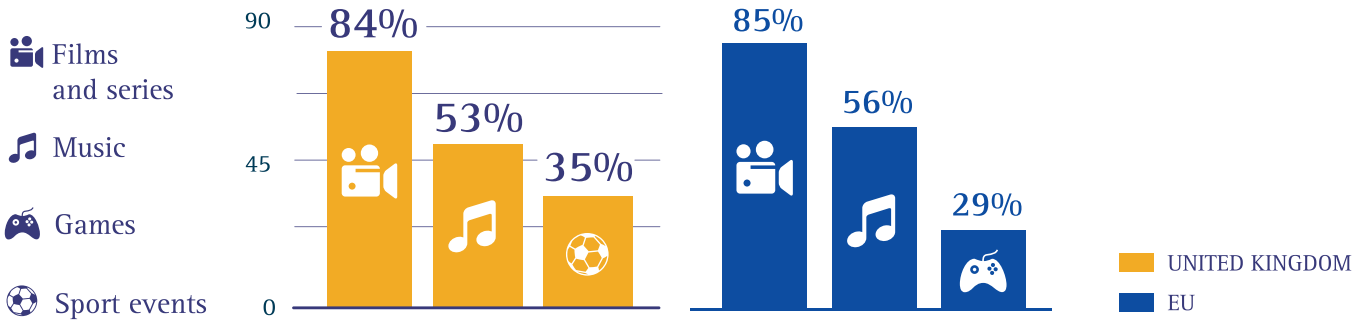
CONTENT

ONLINE

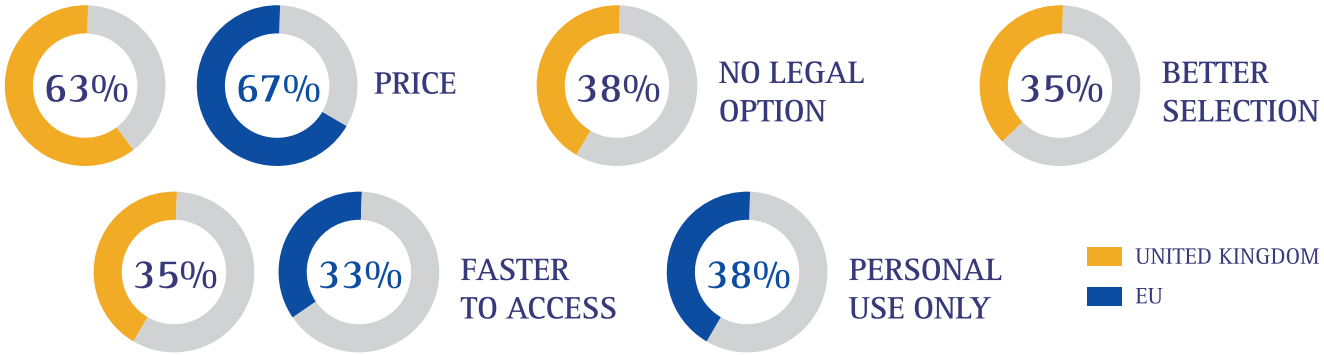
Usage of illegal sources



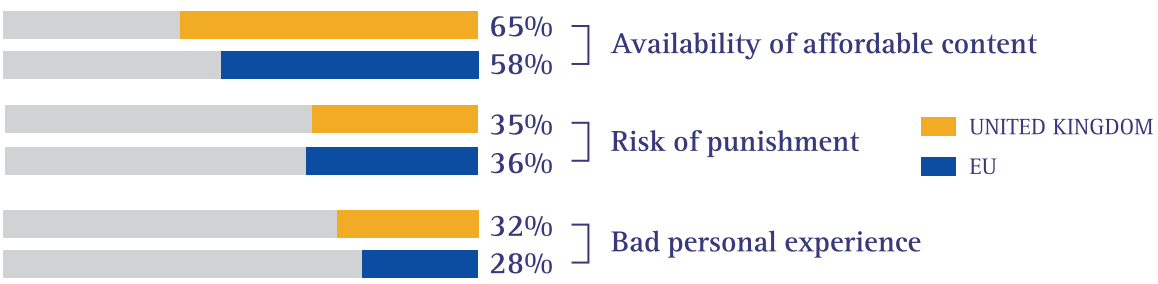
Main digital content accessed from illegal sources



Main reasons to choose illegal sources



Reasons to stop using illegal sources



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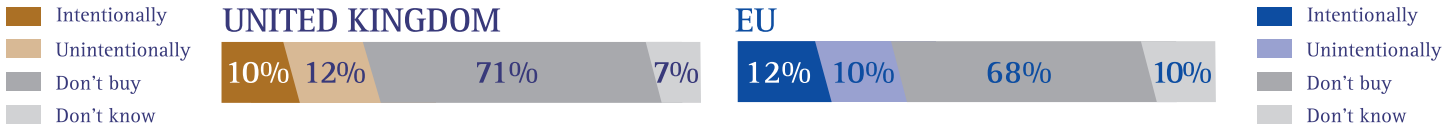
PHYSICAL GOODS

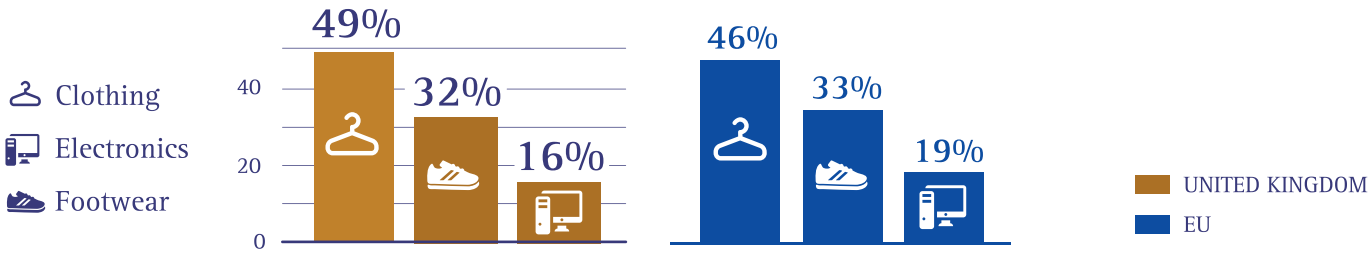
GOODS

PHYSICAL

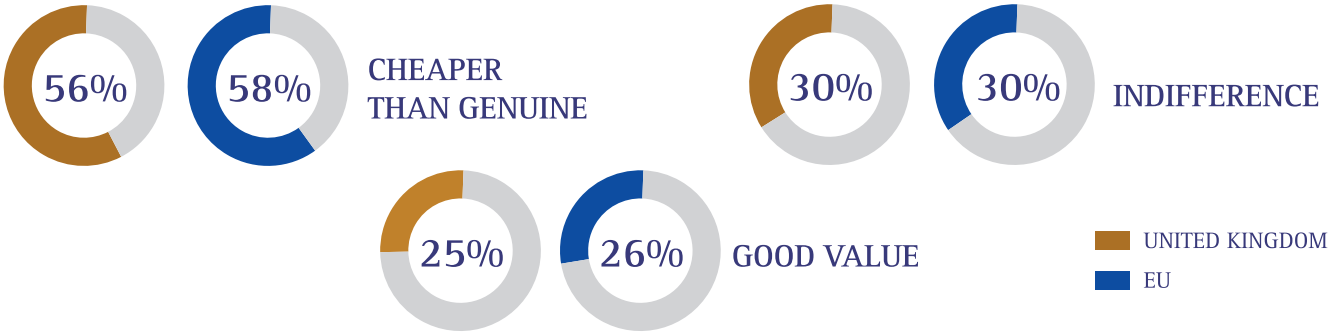
Bought counterfeit goods online



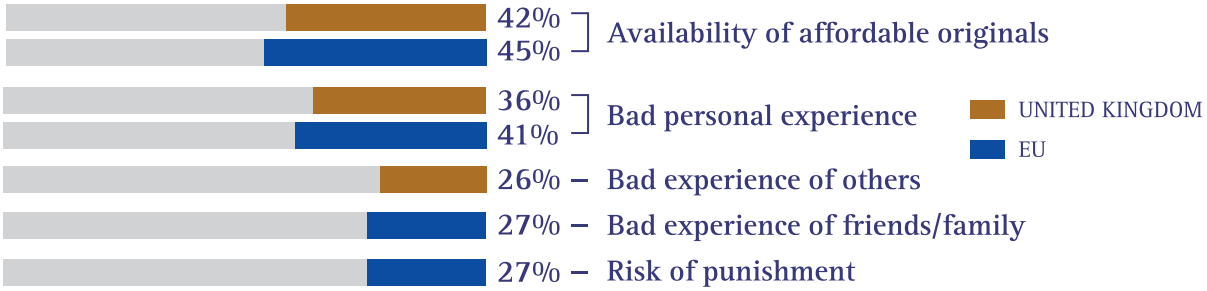
Main counterfeit goods purchased online



Main reasons to buy counterfeit goods online



Reasons to stop buying counterfeit goods online



COMMUNICATING ON PIRACY AND COUNTERFEITING

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