

European Citizens and Intellectual Property: Perception, Awareness and Behaviour

A study commissioned by the Office for Harmonization in the Internal Market (OHIM)
through the Observatory

4 April 2014



- The study was carried out by **Edelman Berland** – a global strategic research and consulting firm specialising in stakeholder perceptions and public opinion evaluation – in partnership with **TNS Opinion**.
- The sample and process used was strictly **identical to that of the Eurobarometer flash surveys**.
- The research was conducted across **all 28 EU Member States** between September 2012 and August 2013.

The survey encompassed **three research phases**:



An in-depth **LITERATURE REVIEW**: analysis of 50 studies about IP that have been published since 2007.



A **QUALITATIVE** stage: over 100 hours of interviews with 250 Europeans aged 15-65 in nine Member States: Croatia, France, Germany, Italy, Lithuania, Poland, Spain, Sweden and the UK. The selected citizens and countries represent a broad diversity in demographics and year of Member State accession to the EU.



A **QUANTITATIVE** stage: telephone interviews with 26,549 Europeans from across all Member States, or about 1000 people per country. The sample was identical to that used in telephone surveys conducted by other European institutions to allow for advanced socio-demographic analysis.

IP Perceptions: Europeans value intellectual property



96%

agree that it is important that inventors and performing artists can **protect their rights** and be **paid for their work**.



76%

agree that **innovation and IP go hand in hand** and the one cannot really exist without the other.



69%

agree that IP-intensive companies **create significantly more jobs** than non IP-intensive companies.

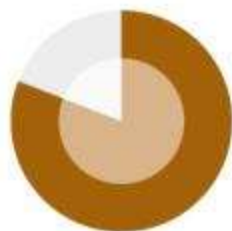


67%

agree that without IP there would be **economic chaos**.

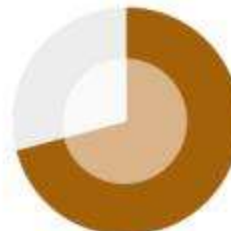


IP Perceptions: EU citizens are strongly opposed to the purchase of counterfeit goods



81%

of Europeans feel
buying counterfeit goods
**ruins businesses and
reduces jobs.**



71%

feel buying counterfeit
goods **supports child
labour and illegal
trafficking.**

54
2

IP Behaviour: Intentional purchase of counterfeit goods

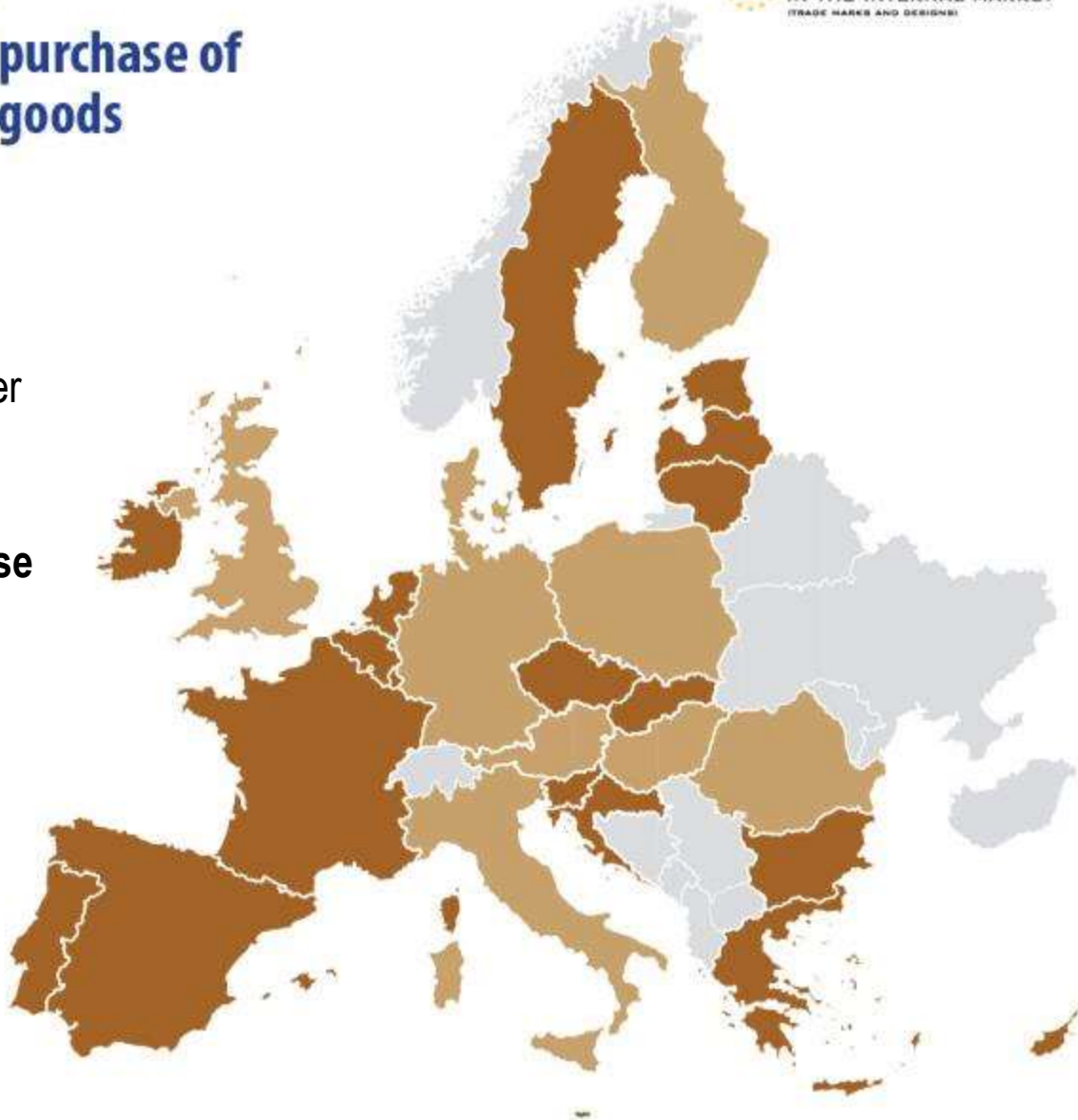


OFFICE FOR HARMONIZATION
IN THE INTERNAL MARKET
(TRADE MARKS AND DESIGNS)

On **average**, 4% of EU citizens have **purchased counterfeit goods intentionally**. There is some variation in this by Member State.

14% of EU citizens considered purchasing counterfeit, but **chose not to**.

- Above EU average
- Below EU average



Over a third of Europeans finds that the **purchase of a counterfeit product can be justified individually**, believing that it 'allows for making a smart purchase' or that it is 'an act of protest' against a market driven economy.



34%

of EU citizens agree that
**buying counterfeit
products** allows making
a **smart purchase**



38%

of EU citizens agree that
buying counterfeit products is
an **act of protest** and a way to
**resist the market driven
economy** and the large
premium brands



IP Perceptions: Tolerance to counterfeit

Approximately **half** of citizens aged 15 to 24 justify buying counterfeit as a '**smart purchase**' or '**an act of protest**'.



52%

of EU citizens aged 15 to 24 agree that **buying counterfeit products** allows making a **smart purchase**



49%

of EU citizens aged 15 to 24 agree that buying counterfeit products is an **act of protest** and a way to **resist the market driven economy** and the large premium brands

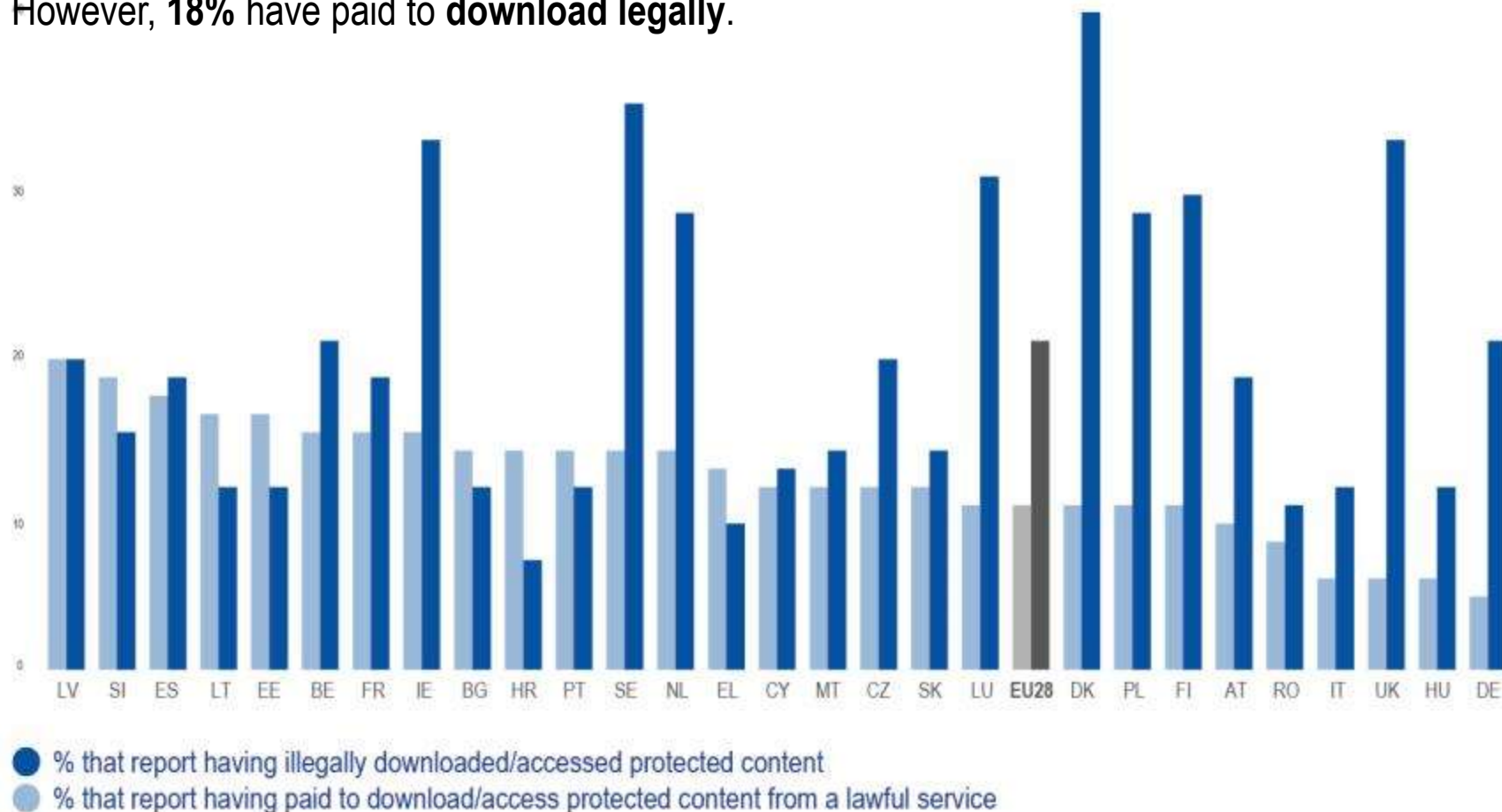
54
2

IP Behaviour: Illegal downloading



OFFICE FOR HARMONIZATION
IN THE INTERNAL MARKET
(TRADE MARKS AND DESIGNS)

On **average**, **9%** of EU citizens have **downloaded illegal content intentionally**.
However, **18%** have paid to **download legally**.



54
2



IP Perceptions: Tolerance to illegal downloading



OFFICE FOR HARMONIZATION
IN THE INTERNAL MARKET
(TRADE MARKS AND DESIGNS)

Many Europeans tolerate illegal downloading when viewed from an individual perspective.



22%

feel illegal
downloading is
acceptable when
**there is no legal
alternative.**



42%

feel it is
acceptable when
**it is for personal
use only.**

54
2

IP Awareness: Legal downloading offers



OFFICE FOR HARMONIZATION
IN THE INTERNAL MARKET
(TRADE MARKS AND DESIGNS)

On **average**, **19%** of EU citizens have wondered whether a site for downloading music or videos was **legal**. For those aged **15 to 24**, this number **rose to 42%**.



- Most aware of legal offers
- Least aware of legal offers

54
2

IP Awareness: Legal downloading offers



OFFICE FOR HARMONIZATION
IN THE INTERNAL MARKET
(TRADE MARKS AND DESIGNS)

On **average**, **12%** of EU citizens have **researched a site** for downloading music or videos to find out if it was legal. For those aged **15 to 24**, this number rose to **26%**.

- Above EU average
- Below EU average





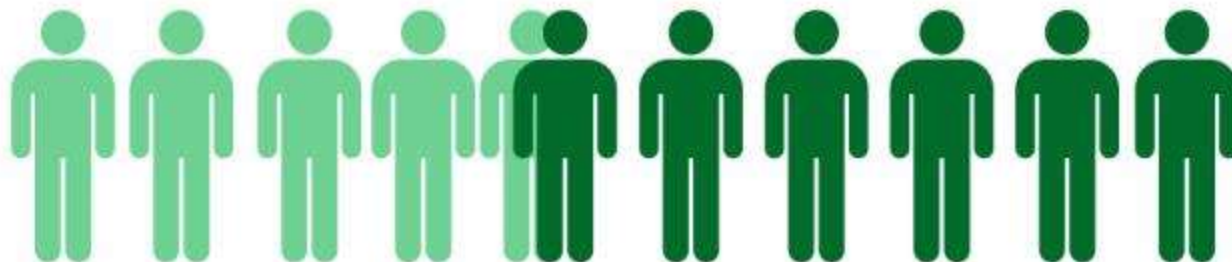
IP Awareness: Legal downloading offers



OFFICE FOR HARMONIZATION
IN THE INTERNAL MARKET
(TRADE MARKS AND DESIGNS)

The legal offers are well known and their quality is acknowledged, but many young Europeans still feel **illegal offers are more attractive**.

47% of EU citizens aged 15 to 34 say that illegal content on the internet is of **better quality** and **more diverse** than legally available content.





IP Perception: Explaining the paradox

The gap between IP perceptions and behaviour may find its source in the fact that most **Europeans feel IP benefits businesses and an elite class.**

Who do Europeans name as the **main beneficiaries of IP?**

