

10th June, 2013

Intellectual Property Consumer Surveys

LITERATURE REVIEW

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EXECUTIVE SUMMARY

I. Objectives of the literature review and research methodology

In order to fulfill the goal of understanding and measuring the level of understanding and awareness of European Union citizens regarding Intellectual Property (IP) and its components, Edelman Berland carried out a comprehensive literature review of publicly available surveys prior to the launch of the quantitative survey. The aim was to capitalise on the existing intelligence available on the topic and identify whitespace opportunities for the creation of the quantitative questionnaire.

We used internet search engines (Google search, Google scholar) to identify relevant studies. Due to the rapidly changing nature of the topic driven by all the changes induced by internet and to base our analysis on reasonably up-to-date data, only surveys published since 2007 were analysed. The research scope focused on surveys from the European Union as well as from the US, Australia and Canada. Studies shared by the Observatory's Public Awareness Working Group members were also integrated into the literature review.

Each relevant survey was then analysed according to its:

- **Methodology:**
 - o Online
 - o Telephone
 - o Face to face interviews
- **Target respondents:**
 - o Consumers
 - o Businesses
 - o Students
- **Geographical scope:**
 - o Pan-European
 - o National (UK, USA, Canadian, Australian, French etc.)
 - o Worldwide
- **Main focus of study:**
 - o Understand attitudes and behaviours regarding counterfeiting and piracy
 - o Attitudes about intellectual property infringement and audio-visual copyright theft in particular
 - o State of IP awareness
 - o Attitudes towards Intellectual Property in general
 - o Etc.
- **Interesting questions we could use in our own questionnaire**

II. Main findings

In terms of geographical scope, **most surveys are carried out on a national basis**. Except for the Eurobarometer study, there are **no existing Pan-European surveys** around IP awareness, understanding and related practices. From all the studies carried out in **European countries, half originate from the UK**

alone and a quarter from France. The largest survey aimed at understanding attitudes and behaviours of consumers on counterfeiting and piracy is the Gallup study with 64,579 interviews across 51 countries.¹

Regarding methodology, an overwhelming majority – **two thirds** – of surveys were carried out online while a little less than a third are telephone surveys. A few surveys were face-to-face interviews or completed in-street. In terms of **target audience, over half of the surveys are consumer-oriented**. The other audiences are split between businesses and surveys targeting students.

Most surveys fell into one of the following **two categories** (in an almost 50/50 proportion) focusing either on **understanding attitudes and behaviours of consumers on counterfeiting and piracy** or on **audio-visual copyright theft** in particular.

Overall, **three conclusions** are recurrent across countries in the different surveys analysed.

The first one is that there is a lot of **confusion about what is legal and what isn't in relation to access to online content**. In the UK, the majority of consumers are confused about copyright law, with 73 per cent agreeing that they are never quite sure what is legal and illegal under current copyright law.² In addition, more than one in four (43%) UK respondents think a site is legal if it has terms and conditions, while 29% think the same if the site appears high in Google search results.³ In Hungary, legal online services are hardly known: 22% of the respondents think that it is not recognisable that music, movies or other content have been posted on the internet by legal means and only 45% of the respondents know sources on the internet where it is possible to listen to or download music legally.⁴ In France, there is also confusion between what is legal and what isn't, especially as some illegal services are charged for. Labeling is the 3rd most important cited factor that enables to determine whether an offer is legal or not.⁵

Overall, **price is the main reason for buying counterfeit goods**. Regarding **illegally downloading**, the emphasis is placed on the **ease of access and immediate availability of the illegal option** compared to the legal alternative: 63% of UK and 77% of US said they would have purchased the original DVD if they had not been able to copy from the internet.⁶ The UK study "*Fake nation*" investigating UK consumers' attitudes on counterfeiting shows that cost is a key driver for the purchase of fake goods with the majority of respondents indicating that they purchased counterfeit goods because they were cheaper and 56% of respondents who had purchased a fake DVD declaring they bought it because they wanted to see a film as soon as possible.⁷ The BASCAP study also comes to this conclusion, confirming that the main reasons for purchase of counterfeits are lower price and availability.⁸

Another overarching conclusion that can be drawn from these surveys is that there has been a clear shift regarding the preferred technologies to access content online: **besides traditional downloads, streaming sites are increasingly being used**. The Hadopi "*Survey of the online music consumption*" shows that a majority of the respondents listening to music online on a weekly basis have a mixed consumption (streaming and downloading).⁹

Regarding **perceptions of the value of intellectual property**, most studies tend to show that when asked (prompted awareness), **respondents mostly agree with statements demonstrating the value of intellectual**

¹ <http://www.ccapcongress.net/archives/Geneva/Files/Stewart.pdf>

² <http://www.consumerfocus.org.uk/assets/1/files/2010/02/Consumer-Focus-Time-to-change-the-tune1.pdf>

³ "*Digital Entertainment Survey - Key Piracy Findings*", Entertainment Media Research for Wiggin LLP, 2012

⁴ http://www.wipo.int/meetings/en/doc_details.jsp?doc_id=218383

⁵ <http://www.hadopi.fr/sites/default/files/page/download/hadopiT0.pdf>

⁶ http://www.wired.com/images_blogs/business/files/dvdpiracy.pdf

⁷ http://www.cric.ac.uk/cric/staff/Jason_Rutter/papers/FakeNation.pdf

⁸ <http://www.iccwbo.org/Advocacy-Codes-and-Rules/BASCAP/BASCAP-Research/Consumer-perceptions/>

⁹ http://www.hadopi.fr/sites/default/files/page/pdf/Consommation_musique_en_ligne.pdf

property and the importance of protecting it. However, these results are to be taken with a pinch of salt because although there is strong agreement that IP is a valuable asset and should be protected, **these thoughts don't always translate into action.**

The Canadian study "*Looking for Leadership: Canadian Attitudes towards Intellectual Property*" concludes that the consensus in Canadian society about the value, the need for protection, and the economic importance of IP is very broad, with remarkably little variation in opinion according to political affiliations. Overall, the vast majority of Canadians (**83%**) **believes that IP deserves the same respect and protection (from theft) as other, more tangible, physical goods.** Nine in ten Canadians agree that "strong patent, copyright and trademark laws are required to protect those who create intellectual property for a period of time so that they can sell or commercialise their ideas before competitors are allowed to copy their creations".¹⁰ The UK study "*The Hidden Marketplace: Protecting Intellectual Property in the Workplace*" highlights that although 92% of respondents agreed with the statement: "Protection of intellectual property (IP) is an essential business activity. It protects investment in innovation, with income streams generated by IP rights enabling creators and investors to dedicate time and resources to new projects" – this strongly stated belief in the value of protecting IP reflects an aspiration rather than a reality.¹¹ In France, the IPSOS study "*The French and illegal downloading of music from the internet*" reveals that **80% believe that artists and authors should be remunerated when their songs are downloaded from the Internet** and that furthermore, **74% are favourable to stricter laws regarding illegal downloading.**

¹⁰ <http://www.wipo.int/ip-outreach/en/tools/research/details.jsp?id=160>

¹¹ <http://www.ipo.gov.uk/pro-ipresearch/ipresearch-policy/ipresearch-policy-attitude.htm>

1. Global Consumer Awareness, Attitudes, and Opinions on Counterfeiting and Piracy

Title of the study/survey: Global Consumer Awareness, Attitudes, and Opinions on Counterfeiting and Piracy

Author/Organisation: The Gallup Organization

Source: <http://www.ccapcongress.net/archives/Geneva/Files/Stewart.pdf>

Year of publication: 2007

Main Focus: Counterfeiting and piracy

Methodology, sample, scope:

- Telephone/in-home surveys
- 64,579 consumers across 51 countries
- Represents the views of consumers whose economies account for 64% of the world's GDP
- 1000 plus interviews in all countries but Luxembourg, Sri Lanka, Haiti, Jamaica, Trinidad/Tobago, and Puerto Rico

Length of the study: Short, 12 pages PPT

Objective(s) of the survey: To understand attitudes and behaviours of consumers on counterfeiting and piracy

Main findings:

- Latin American consumers were the most likely to agree that their government is committed to find and prosecute counterfeiting (with about 45% finding their government “committed”), followed by Asian consumers (with about 35%), former Soviet Union (FSU) consumers (with about 25%), and Western European consumers (with about 18%).
- The FSU countries surveyed in which most consumers had purchased counterfeit products in the past 12 months were: Kyrgyzstan (with 40.2% consumers having purchased fakes), followed by Russia (38.4%), Moldova (31.5%), and Belarus (29.3%). Counterfeit consumption was less prevalent in Georgia (23.1%), Lithuania (22.9%), Armenia (16.8%), and Estonia (14.8%). FSU counterfeit consumers mostly bought the following fake items: music (37.9%), food (34.5%), clothes/bags/footwear (27.3%), movies (27.0%), and alcoholic/non-alcoholic beverages (23.6%). FSU respondents believe that mostly “those who make/create products” (63.7%), “sellers/distributors” (45.5%), “organised crime” (28.3%), and “government officials” (20.1%) benefit from piracy and counterfeiting.
- The Asian countries surveyed in which most consumers had purchased counterfeit products in the past 12 months were: Malaysia (with 38.2% of consumers having purchased fakes), followed by the Philippines (27.9%), and Sri Lanka (24.6%). Counterfeit consumption was less prevalent in Vietnam (21.1%), Thailand (21%), and Nepal (20.4%). Asian counterfeit consumers mostly bought the following fake items: music (43.5%), clothes/bags/footwear (31.8%), movies (27.1%), perfumes and cosmetics (10.3%), and watches (9.3%).
- The Latin American countries surveyed in which most consumers had purchased counterfeit products in the past 12 months were: Haiti (with 40% of consumers having purchased fakes), followed by Cuba (39.4%), Guatemala (30.6%), and El Salvador (27.2%). Counterfeit consumption was less prevalent in Costa Rica (13.6%), Uruguay (13.4%), Panama (13%), and Puerto Rico (12.1%). Latin American counterfeit consumers mostly bought the following fake items: music (42.6%), clothes/bags/footwear (26%), movies (23%), perfumes and cosmetics (10.6%), and food (10.2%). Latin American respondents believe that mostly “sellers/distributors”

(52.2%), “those who make/create products” (37.8%), and “those who buy/purchase the products” (19.2%) benefit from piracy and counterfeiting.

- In the US, 96.4% of consumers would not buy counterfeits if the seller was sponsoring a terrorist organisation. Other effective deterrents appear to be “the seller funding a terrorist act” (with 96.3% not purchasing in this scenario), “the seller funding organised crime” (94.7%), “seller distributing a product that could harm you or your family” (92.4%). Financial loss for the State (no sales tax on counterfeits), and financial losses for the genuine manufacturers are arguments consumers care less about.

Interesting questions to use in quantitative questionnaire:

→Q: *Which groups or organizations do you believe benefit from piracy or counterfeiting?*

Probe: Those who make/create products; sellers/those that distribute products; organised crime; government officials; importers/exporters; those who buy/purchase the products; don't know; terrorist organisations; other

→Q: *Would you have purchased the imitation you previously mentioned you bought if you knew the seller was ()?*

Probe: Sponsoring a terrorist organization; funding a terrorist act; funding organised crime; distributing a product that could harm you or family; using earnings to bribe gov. officials; charging the same amount as legitimate product; financially hurting the company that produces legitimate product; not paying sales tax.

2. CONSUMER ATTITUDES AND PERCEPTIONS ON COUNTERFEITING AND PIRACY

Title of the study/survey: CONSUMER ATTITUDES AND PERCEPTIONS ON COUNTERFEITING AND PIRACY

Author/Organisation: BASCAP

Source: <http://www.iccwbo.org/Advocacy-Codes-and-Rules/BASCAP/BASCAP-Research/Consumer-perceptions/>

Year of publication: 2009

Main Focus: Consumer attitudes towards counterfeiting and piracy

Methodology, scope, sample:

- Desk research: analysis of 176 existing consumer perception studies and 202 consumer awareness campaigns from 40 countries
- Qualitative research: 20 focus groups conducted in capital cities with 180 participants (London, Mexico, Moscow, Delhi, Mumbai and Seoul)
- Quantitative research: quantitative surveys in 5 key markets (UK, Russia, South Korea, Mexico and India). Nationally representative samples (1000 adults per country)

Length of the study: Large, approx 100 pages

Objective(s): Enlighten communications tactics that can help change those attitudes and behaviors in ways that will help consumers more fully understand the repercussions of buying fake products - and ultimately deter these illegal and unsafe purchases.

Main findings:

- A large majority of consumers do recognize buying counterfeit or engaging in Piracy is unethical but feel it's harming nobody (but big corps.) so seldom feel guilty about it
- Consumers perceive the CF / Piracy business harmless in the absence of obvious sanctions against purchasers and sometimes sellers (prosecution threat is more credible for Piracy of Digital contents than for fake goods purchase)
- CF purchase is an «impulse », consumers need the product fast, use them fast, throw them out fast. They don't think of the product origin or distribution system at all. The "home privacy" lowers consumers fear to be spotted downloading illegal content
- Consumers refuse to call themselves victims of CF. They have the feeling they « control it ». In some cases they feel empowered by their purchase
- There is not a typical CF purchaser socio-type. However, the kind of CF products people purchase varies depending on nationality, income level and age. Almost everyone can be a CF buyer / a digital pirate
- The main reasons for CF purchase are well known and confirmed: lower price and availability. But more sophisticated motives co-exist: a rejection of the established order and distribution system (Mexico) a teenage spirit (UK) or even a paradoxical soft rebellion against consumption society
- In emerging markets more than half the CF purchases are from regular stores. Consumers often feel it's impossible to protect themselves from CF. Online CF purchase is for now only visible in Korea and U.K.
- Consumers from all countries act along proximity rules! They care first for themselves and their family, then for their community, then for their country

- Not all consumers have a clear vision and understanding of the benefits of « going genuine », Quality and customer service often fail to convince consumers that paying more for the genuine product is worthwhile
- Risk to health , Risk to already possessed goods and Risk of prosecutions (when credible) are the 3 most powerful deterrents against CF Purchase
- Consumers no longer listen to traditional authority figures (Judge, Government officials, Policemen) but expect them to lead the fight against CF & Piracy. Consumers admit they need boundaries to act ethically
- The most credible spokespersons would be victims (firstly, people whose health has suffered, followed by economic victims). These victims have to be ultra-local to generate empathy. A challenge for Piracy that have no consequence on Health
- Consumers identify real differences within CF products, some of them talk about « Class A » or « First class CF », as the ultimate fakes that every smart consumer would seek. Generally speaking they report a raise in CF quality
- There are many words for CF: Copies, Copycat, Fakes, Pirate goods or even Crap... All these notions cover subtle differences. Chinese products (cheap and expandable) and Grey market goods (off the truck, custom seizure, hard discount products) all contribute to blur the picture
- Consumers admit they « don't think about their purchase implications » They genuinely report not understanding why CF / Piracy is a plague beyond the mere ethical principle. They want evidence that C&P is harming them / their community / society as a whole and not only companies. They also want to see « what's in it for them » if they stop buying CF or downloading illegally.

Interesting questions to use in quantitative questionnaire:

→ Q: *For each type of products listed below please tell me if you have ever purchased counterfeit or illegal copies and how often you do so?*

→ Q: *For each type of products listed below please tell me if you can find counterfeit or illegal copies in your day to day environment?*

→ Q: *Thinking about each type of counterfeit product you said you have purchased, where do you usually buy them?*

→ Q: *According to you why would a person like yourself buy certain CF products? Select all the reasons you find relevant. Probe e.g. cannot afford the genuine product; I don't know it's not genuine; I think the genuine is overpriced etc.*

→ Q: *From the statements listed below, please select all those you would use if you were asked to convince a friend to stop buying CF products? (Multiple answer). Probe: they can damage your health or safety; poor quality can damage the equipment you own; if you buy genuine you'll have better service and warranty etc.*

3. INTELLECTUAL PROPERTY THEFT: GET REAL

Title of the study/survey: Intellectual Property Theft: Get Real

Author/Organisation: Commissioned by the US National Crime prevention Council – the research was carried out by Moessner and Associates, working in tandem with the CauseWay Agency

Source: <http://www.ncpc.org/topics/intellectual-property-theft/ncpcs-research>

Year of publication: 2010

Main Focus: Attitudes, knowledge, and beliefs of adult and teenage Americans on intellectual property theft.

Methodology, scope, sample: Focus groups and a nationally representative online survey carried out in August-October 2010. There were six focus groups, held in New York, St. Louis, and San Francisco. The online survey examined the attitudes, knowledge, and beliefs of 1,017 adult Americans, age 18 and older, and 502 teens, age 13 to 17.

Length of the study: Unknown because full study is not available online

Objective(s): Assess attitudes about intellectual property crime

Main findings:

- Most people can't accurately describe "intellectual property" or "intellectual property crimes."
- Most respondents said that if intellectual property theft was a serious problem, they would see people being arrested or see more stories in the news media.
- Most respondents didn't know that their purchase or use of a counterfeited or pirated product hurts other people or their communities. Young adults are the largest group to have this view.
- Respondents didn't liken the purchase or downloading of counterfeit or pirated materials to crimes like shoplifting or robbery.
- More than 80 percent of adults (over 18) believed it is illegal to knowingly purchase counterfeit or pirated products. The truth is that it's illegal only when these materials are purchased in large quantities and intended for sale.
- Fifty-two percent of respondents said they didn't know where to go for information.
- Sixty-three percent said they needed more information.
- Information provided must be personally relevant.
- Many people didn't believe that counterfeiting or pirating cost jobs.
- Most respondents—64 percent—said that television is the best way to reach them with messages about counterfeit products and piracy. Social media (11 percent of adults, 19 percent of teens) came next, followed by ads on the Internet (7 percent adults, 10 percent teens).

Interesting questions to use in quantitative questionnaire: Questionnaire and full report not accessible online.

4. AUSTRALIAN ATTITUDES AND ACTIVITIES IN RELATION TO ILLEGALLY ACCESSING ONLINE MOVIES AND TELEVISION SHOWS

Title of the study/survey: Australian attitudes and activities in relation to illegally accessing online movies and television shows

Author/Organisation: Commissioned by the Intellectual Property Awareness Foundation (IPAF) through Sycamore Research & Marketing & Newpoll

Source: <http://apo.org.au/research/australian-attitudes-and-activities-relation-illegally-accessing-online-movies-and-televi>

Year of publication: 2012

Main Focus: This report presents statistics on Australians who illegally stream or download movies and television.

Methodology, scope, sample:

- Newspoll online omnibus
- 1,654 Australian adults aged 16-64
- Results post weighted to ABS data on all standard demographics

Length of the study: 4 pages PDF

Objective(s): Research into the attitudes and actions of Australians in relation to the issue of illegal content theft of movies and television shows: scale of illegal downloading, reasons for illegally downloading

Main findings: The study segments the population by the frequency of their illegal behaviour:

- 10% Persistent illegal downloaders: Those who download or stream illegal movies or TV shows at a frequency of at least once a week
- 17% Casual illegal downloaders: Those who download or stream illegal movies or TV shows monthly or less often (but not as frequently as once a week)
- 10% Lapsed illegal downloaders: Those who have downloaded or streamed illegal movies or TV shows in the past but claim not to 'nowadays'
- 63% Non-illegal downloaders: Those who have not downloaded or streamed illegally.
- This means just over 1/4th of the population is currently active
- The reason people download illegally is because it is free

Interesting questions to use in quantitative questionnaire:

Q: If I am paying for an internet connection I should be allowed to download or watch any movies or TV shows I want?

Probe: Strongly agree, somewhat agree, somewhat disagree, strongly disagree

5. AWARENESS, PERCEPTION AND IMPACTS OF INTERNAL MARKET POLICIES

Title of the study/survey: Awareness, Perception and Impacts of Internal Market Policies

Author/Organisation: Internal market and Services DG

Source: http://ec.europa.eu/public_opinion/archives/ebs/ebs_363_en.pdf

Year of publication: 2011

Main Focus: Chapter entitled "Awareness and opinions about intellectual property rights" within the Special Eurobarometer 363 which examines people's awareness of, and attitudes to, the EU's common laws on counterfeiting and piracy

Methodology, scope, sample:

- 26 836 interviews with European citizens aged 15 or above in all EU27
- A minimum of 1000 interviews in all countries except for Cyprus, Luxembourg and Malta (500)
- All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (Computer Assisted Personal Interview) was used in those countries where this technique was available.

Length of the study: 25 pages – one chapter out of five

Objective(s): DG MARKT undertook research out in the first quarter of 2011 on "Awareness, Perception and Impacts of Internal Market Policies". The data is representative of EU citizens' views and fills the often deplored information gap on our key stakeholder's needs and opinions. The study gauges the current level of awareness of the Internal Market and its benefits amongst the general public. It also measures citizens' attitudes as regards key Internal Market issues (e.g. counterfeiting and piracy).

Main findings:

- A majority (58%) of people say that they are aware of EU common laws to combat piracy and counterfeiting.
- There is considerable variation in awareness between Member States, for example 77% of people in Luxembourg say they are aware of common anti-piracy laws, as opposed to just 35% in Bulgaria.
- 20% of people have bought goods in the EU that they later realised were counterfeit. This experience is much more common in certain Member States, such as Romania (40%) and Lithuania (38%).
- While recognising the negative effects of counterfeiting, the majority of EU citizens (54%) believe it can be acceptable to buy counterfeit products.
- Only 12% of EU citizens think that counterfeiting is justifiable under any circumstances, but almost half (44%) think it is acceptable when the original product is too costly.
- Fashion wear and accessories are the fake products most commonly purchased.
- The socio-demographic data reveal few gender and age variations, although younger EU citizens tend to be less inclined to believe that counterfeit goods have negative impacts. Only 50% of those in the 15-24 age range agree that counterfeit products can pose a risk to health, compared with 58% for the 25-39 group, 61% for the 40-54 group, and 62% for the 55+ category. Young people are also less inclined to believe that counterfeiting ruins businesses and jobs.
- People who are aware of the EU's common piracy laws are more likely to agree that counterfeit products have certain negative impacts.

Interesting questions to use in quantitative questionnaire:¹²

QD10: According to you, are there common rules and laws in the EU to combat counterfeiting and piracy? (Yes, No, DK)

QD11: Have you ever bought a product in good faith, only to find out later that it was counterfeit? (Yes, No, DK)

QD12: What kind of product(s) was it? (MULTIPLE ANSWERS POSSIBLE)

Probe: music, film, software, sports equipment, perfume, tobacco, pharmaceuticals, toys, consumer electronics, fashion wear and accessories, spare parts (automotive), other.

QD13: In your view, when is it acceptable or justified to buy counterfeit products? For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

Probe: It is OK when a) the price for the original/ authentic product is too high, b) it concerns luxury products, c) the original product is not or not yet available where you live, d) the quality of the product does not matter.

QD14: For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree to say that

Probe: in general, counterfeit products... a) have the same quality as the original product; b) pose a threat to health; c) support child labour and illegal trafficking; d) ruin businesses and jobs; e) discourage companies from inventing new products and introducing them to the market; f) support the economy of the countries where they are produced.'

¹² Note: questions translated and available in French and German

6. CONSUMER FOCUS RESPONSE TO INDEPENDENT REVIEW OF IP AND GROWTH

Title of the study/survey: Consumer Focus response to independent review of IP and Growth

Author/Organisation: BMRB commissioned by Consumer Focus

Source: <http://www.consumerfocus.org.uk/files/2009/06/Response-to-independent-review-of-IP-and-Growth-Part-2-fair-use-licensing-solutions-and-appropriate-enforcement.pdf.pdf>

Year of publication: 2009

Main Focus: UK copyright law: consumer activities and perceptions

Methodology, scope, sample: Face to face Omnibus among 2,026 British adults aged 15 and older. The field work was undertaken 17th-23rd September 2009.

Objective(s): Understand which activities consumers had undertaken in the past 12 months, which activities they think are illegal under UK copyright law, and which activities they think should be illegal.

Main findings:

Before telling consumers what is and what is not illegal under UK copyright law, we asked them which activities they had undertaken in the past 12 months, which activities they think are illegal under UK copyright law, and which activities they think should be illegal.

	activities done in the last 12 months	perception 'is illegal'	actual legal status	expectation 'should be illegal'
	GB population total	GB population total		GB population total
Copying a CD or DVD you have bought to another format so that you have a copy in more than one location	11%	26%	Illegal	14%
Making a back-up copy of computer software you have bought	11%	19%	Legal	12%
Making a back-up copy to CD, DVD or tape of any music, movies or e-books you have bought	11%	22%	Illegal	11%
Copying a CD or DVD you have bought to a computer for your own use	14%	17%	Illegal	10%
Copying a CD or DVD you have bought to a memory stick for your own use	9%	17%	Illegal	9%
Copying a CD or DVD you have bought to an iPod, mobile phone or any other mobile device for your own use	16%	15%	Illegal	9%
Recording a TV programme at home to watch at a later time (on a video recorder or Sky+ for example)	40%	4%	Legal	3%

Interesting questions to use in quantitative questionnaire:

→Q: Please tell me the extent to which you agree or disagree with the following statements?

- Copyright law should achieve a fair balance between the interests of artists and consumers
- UK copyright law should be updated now that we have digital technologies
- I'm never quite sure what is legal and illegal under current copyright law
- I would support a campaign aimed at updating UK copyright law
- It's impossible to enforce current copyright law now that we have digital technologies
- I should be able to copy copyrighted works for my own use
- Copyright owners should have the exclusive right to make money from the copyrighted work, instead of having the exclusive right to copy, show, play, distribute and adapt copyrighted works.
- I should be able to share copyrighted work with family
- Copyright law, as explained, makes it illegal to have fair access to music, video and books
- I should be able to adapt copyrighted works for my own use
- I should be able to share copyrighted work with friends
- UK copyright law is fine as it is

7. THE IMPACT OF MUSIC DOWNLOADS AND P2P FILE-SHARING ON THE PURCHASE OF MUSIC: A STUDY FOR INDUSTRY CANADA

Title of the study/survey: The Impact of Music Downloads and P2P File-Sharing on the Purchase of Music: A Study for Industry Canada

Author/Organisation: The survey was conducted by Decima Research for Industry Canada

Source: http://papers.ssrn.com/sol3/papers.cfm?abstract_id=2128054

Year of publication: 2006

Main Focus: A study commissioned by Industry Canada, which includes some of the most extensive surveying to date of the Canadian population its music downloading and purchasing habits. The authors believe this is the first ever empirical study to employ representative microeconomic data.

Methodology, scope, sample: Telephone interviews were conducted with 2,100 randomly selected Canadians (15 years and older) across the country between April and June 2006 - 1,000 who downloaded music files over the Internet in 2005, and 1,100 who did not. Generally, the questionnaire used contained two types of questions on current music acquisition behaviour or the different methods used for acquiring music (e.g. buying CDs and P2P downloads).

- The first type of questions (question 1.3) asked whether you acquired music by a particular method which gives rise to a binary variable (yes or no).
- The second type of questions were follow up questions (questions 2 and 4) which asked people to estimate of the number of units they may have acquired by a particular method in an average month in 2005, giving rise to a quantitative variable. In selected cases, there was some supplementary follow up questioning or information sought.

Objective(s): Evaluate the Impact of Free Music Downloads on the Purchase of Music CDs in Canada

Main findings:

- The two key findings:
 - When assessing the P2P downloading population, there was "a strong positive relationship between P2P file sharing and CD purchasing. There is a positive correlation between peer-to-peer downloading and CD purchasing. That is, among Canadians actually engaged in it, P2P file sharing increases CD purchases." The study estimates that 12 additional P2P downloads per month increases music purchasing by 0.44 CDs per year.
 - When viewed in the aggregate (i.e. the entire Canadian population), there is no direct relationship between P2P file sharing and CD purchases in Canada. According to the study authors, "the analysis of the entire Canadian population does not uncover either a positive or negative relationship between the number of files downloaded from P2P networks and CDs purchased. That is, we find no direct evidence to suggest that the net effect of P2P file sharing on CD purchasing is either positive or negative for Canada as a whole."

8. LOOKING FOR LEADERSHIP: CANADIAN ATTITUDES TOWARDS INTELLECTUAL PROPERTY

Title of the study/survey: Looking for Leadership: Canadian Attitudes towards Intellectual Property

Author/Organisation: Environics Research Group

Source: <http://www.wipo.int/ip-outreach/en/tools/research/details.jsp?id=160>

Year of publication: 2008

Main Focus: IP Knowledge, IP protection: Copyright, Economic / Financial Impact, Enforcement, Outreach / Education

Methodology, scope, sample: 2.724 randomly selected Canadians aged 15+; in-home, self-completion questionnaire

Objective(s): To examine Canadian attitudes toward intellectual property protection

Main findings:

- The study identified three groups with distinct attitudes towards intellectual property (IP) and downloading, collectively representing about half of the Canadian population: firstly, representing 16% of Canadians, the "moralists" (who refuse piracy and illegal downloading categorically, which they consider a serious crime, and whose strong moral convictions make them very unlikely to abuse IP, even in the absence of official rules); secondly, representing 5% of Canadians, the "unrepentant downloaders" (who feel no compunction about illegal downloading and abusing IP, which they consider "not a very serious crime", and whose focus on new and exciting experiences drives them to do what they want, regardless of the rules); thirdly, representing 25% of Canadians, the "impressionable" (who are aware of the economic importance of IP and support strong IP laws, but nevertheless consider piracy "not a serious crime", and who rely on cues from others - peers, government, employers, parents - to know what behaviour is acceptable and what is not).
- Given the strong influence of the social context on the third group, the authors highlight that political leadership and clear rules (a sound legal and economic framework) are crucial in shaping a society in which the impressionable sense that the abuse of IP is no longer tolerated.
- Overall, the vast majority of Canadians (83%) believes that IP deserves the same respect and protection (from theft) as other, more tangible, physical goods. Nine in ten Canadians agree that "strong patent, copyright and trademark laws are required to protect those who create intellectual property for a period of time so that they can sell or commercialise their ideas before competitors are allowed to copy their creations".
- Apart from their support voiced for the creation and enforcement of laws that protect IP, most respondents (82%) also support a proactive government role in educating Canadians about the need to respect intellectual property, particularly online.
- Canadians believe that respect for creative work should be fostered among young people (which are found to be considerably more permissive with regard to plagiarism and cheating, when compared to Canadians overall). Accordingly, Canadians overwhelmingly agree that parents should actively promote responsible online behaviour: the beliefs that "parents should teach their children how to use the Internet in a responsible fashion" (93%) and that "parents should be responsible for monitoring the use of the Internet by their children" (91%) are almost universally

accepted. Nearly two in three respondents (64%) support holding parents accountable if their children engage in illegal downloading.

- When asked about the link between IP and economic success, 93% of respondents agree that "the creation of IP is essential for Canada's long-term economic growth and prosperity". More than 80% recognise the role of material incentives in encouraging IP creation, agreeing that "those who create intellectual property would have little incentive to do so if competitors could immediately copy and sell the creations as their own".
- The consensus in Canadian society about the value, the need for protection, and the economic importance of IP is very broad, with remarkably little variation in opinion according to political affiliations.

9. UK INTELLECTUAL PROPERTY AWARENESS SURVEY 2006

Title of the study/survey: UK Intellectual Property Awareness Survey 2006

Author/Organisation: Robert Pitkethly [Oxford University]

Source: <http://www.ipo.gov.uk/ipsurvey.pdf>

Year of publication: 2007

Main Focus: the state of IP awareness in the UK across all sizes of firm and all sectors of industry.

Methodology, scope, sample: 1.709 firms of all sizes and in all sectors of UK industry, mail questionnaire

Length of the study: Large, 54 pages

Objective(s): Give an accurate benchmark indication of the state of IP awareness in the UK across all sizes of firm and all sectors of industry.

Main findings:

- IP knowledge and understanding
 - Only 11.2% of Micro-enterprises with 0-9 employees and 33% of firms with more than 250 employees know that publishing before filing will invalidate a UK patent application. Overall over 50% of UK industry didn't know and 36% incorrectly thought it would not, representing a considerable risk to the preservation of patentable innovation.
 - When asked which sources they would check to clear use of a new business or product name, 53% of firms chose to search UK trademarks and 70% UK company names. Though few (<9%), even among the smallest firms, admitted to not searching any of the sources mentioned, still only around half of all SMEs and micro-enterprises said they would search UK trademarks. This again indicates a continuing need for IP awareness promotion amongst such companies.
- IP management practices
 - Overall only about 8% of UK firms specifically assign responsibility for managing IPRs. This rises to about 57% in the case of large companies but the majority of SMEs and Micro-enterprises are leaving the issue without active management and will only react passively to IP issues. Even amongst large companies only 34% have an overall IP policy and surprisingly even of these only 46% distribute the policy to their staff. 23% of large firms provide IP training for staff but of the rest of firms with less than 250 employees no more than about 5% provide any IP training. There is thus a need to promote IP awareness not just to firms but also within firms.
- IP information and advice
 - The incidence of firms which have ever sought IP advice is over 70% for larger companies whilst even 20% of micro-enterprises with 0-9 employees have sought advice. The difference between large and small firms regarding advice on IPRs lies in the source of that advice. In the case of large companies advice mainly comes from external Patent or Trademark Attorneys or External solicitors with a smaller proportion of such staff in-house. In the case of SMEs there is greater reliance on the UK Intellectual Property Office and less on in-house sources of advice. Micro-enterprises rely

predominantly on advice from solicitors, the UK Intellectual Property Office and external patent and trademark attorneys.

- Larger companies are more IP aware and have greater resources to both find out about IP and do something about it, whilst SMEs and the mass of Micro-enterprises which form the cradle of IP and future large companies are in the main effectively unaware of the IP system. There is variation with industry sectors but leaving aside outliers such as the Hotel and Restaurant sector, this is less pronounced than that with firm size.

10. UK INTELLECTUAL PROPERTY AWARENESS SURVEY 2010

Title of the study/survey: UK Intellectual Property Awareness Survey 2010

Author/Organisation: Intellectual Property Office

Source: <http://www.ipso.gov.uk/ipsurvey2010.pdf>

Year of publication: 2010

Main Focus: UK business awareness of IP

Methodology, scope, sample:

- IP Awareness Survey has been carried out on behalf of the Intellectual Property Office by Dr. Robert Pitkethly of St. Peter's College and the Oxford Intellectual Property Research Centre, Oxford University and with the assistance of the UK Office of National Statistics who provided sample data from the IDBR and comments on response rates.
- The survey covered all sizes of companies which were split into four segments for analysis: micro enterprises with 0-9 directors or employees, SMEs with 10-49 or 50-249 employees, and large companies with more than 250 employees. In covering micro-enterprises the survey followed the 2006 survey but again differed from other innovation related surveys the view having been taken that micro-enterprises should be included as representing the cradle of much intellectual property and the stage when it is at its most vulnerable.
- The data was collected using a questionnaire intended to largely replicate and thus be easily comparable with that used for the 2006 survey. That had been devised as the result of several rounds of discussions involving members of the Intellectual Property Awareness Network including representatives from academia, industry, professional and scientific associations, lawyers, Patent attorneys and representatives from the Intellectual Property Office and the IPI. In the present 2010 survey the questionnaire comprised 36 questions compared to the 37 of the 2006 survey. The questions were again divided into sections relating to: IP Knowledge and Understanding, Ownership of IP Rights, Management of IP, and Sources of Information about IPRs.
- The present survey was sent out with a covering letter from the Intellectual Property Office in March 2010 with a deadline for return of 9th April. The covering letter offered respondents the possibility of replying via the internet and the results collected include both internet and postal replies.
- The survey resulted in over 1900 replies from firms of all sizes and in all sectors of UK industry. The raw results were weighted to represent the whole of UK industry and the accuracy of the results stated for the whole population of the UK is +/- 3% or better.

Length of the study: Large, 62 pages long

Objective(s): The survey aims to give an accurate benchmark indication of the state of IP awareness in the UK across all sizes of firm and all sectors of industry and to enable comparison with other past and future surveys.

Main findings:

- The results of the survey present a consistent picture of IP awareness. Larger companies are more IP aware and have greater resources to both find out about IP and do something about it, whilst SMEs and the mass of Micro-enterprises which form the cradle of IP and future large companies are in the main effectively unaware of the IP system. There is variation with industry sectors but leaving aside outliers such as the Hotel and Restaurant sector, this is less pronounced than that with firm size. Minor variations are also noticeable by geographic region with Northern Ireland showing slightly lower levels and London and Wales showing slightly higher levels of awareness.
- Since the original survey was run in 2006 the basic results from that survey have been confirmed and little dramatic change has occurred in the features of IP awareness measured. Where there has been change it might be characterised as comprising gradual and small increases in IP awareness amongst smaller companies whilst at the same time large firms are showing some signs of a decline in IP awareness particularly where this is linked to features which involve cost such as external sources of legal advice or the setting up of specialist departments. This seems consistent with the fact that the survey was run in April 2010 in the midst of continuing financial pressures with firms guarding against uncertainty in the business environment.
- The message therefore seems to be one where continued effort is required to increase IP awareness amongst SMEs which are the source of new business growth. This needs to be combined at the same time with action to ensure that financial pressures on larger companies do not result in a decline in IP awareness for lack of expenditure on IP awareness training and IP management within companies. Attention to cost effective means of promoting and disseminating IP related advice is therefore essential.

Interesting questions to use in quantitative questionnaire:

- **IP Knowledge and Understanding**

→Q: *Does publication of an invention before filing a Patent application for it prevent a valid UK Patent being obtained?* Yes / No / Don't Know

→ Q: *If you were choosing a new business or product name which of the following would you check?*
Probe: 1. UK Trademarks; 2. UK Company Names; 3. Domain names; 4. Web Search (e.g. Google); 5. None of these; 6. Other (Please specify)

→ Q: *If you paid a subcontractor to design your website or promotional literature would Copyright exist in that material?* Yes / No / Don't Know

→Q: *In the absence of any assignment who would own any Copyright created?*
Probe: Your company / The subcontractor / Don't Know

→Q: *Is an application necessary to obtain any of the following IPRs?*
Probe: 1. Patents; 2. Registered Trademarks; 3. Copyright; 4. Registered Designs – Yes / No / Don't Know

→Q: *How important to your business, is each of the following methods to protect innovations?*
(Unimportant; Not very Important; Important; Very Important; Essential)
Probe: 1. Patents 2. Registered Trademarks 3. Copyright 4. Registered Designs 5. Confidentiality agreements 6. Secrecy 7. Complexity of Design 8. Lead-time over competitors 9. Other (please specify)

11. FAKE NATION

Title of the study/survey: Fake Nation

Author/Organisation: Intellectual Property Theft and Organised Crime research project

Source: http://www.cric.ac.uk/cric/staff/Jason_Rutter/papers/FakeNation.pdf

Year of publication: 2004

Main Focus: Consumers' attitudes on counterfeiting - what people really think about counterfeit goods and why do they choose to buy or, indeed, not to buy, fake products

Methodology, scope, sample: The project used both qualitative and quantitative methods.

- Quantitative – over 2,000 people were questioned using a postal and web-based questionnaire. The total sample for the quantitative data set was 2,388. Age distribution was consistent with reflected population. The gender split in the total sample was 60.2% male and 39.8% female. The distribution of participants across income categories was highest in the lower income categories. 60.7% of the sample was from households with annual income of less than £25,000.
- In addition, nine focus groups were conducted in England and three in Northern Ireland. Participants were recruited through community associations, churches, universities and schools to gain participants from pre-existing social groups. The focus groups examined consumer perceptions and motivations surrounding the consumption of counterfeit goods using a semi-structured format.

Length of the study: Medium, 32 slides

Objective(s): The project objectives were to develop a deeper understanding of the following key issues:

- Consumer attitudes towards, and motivations for, the consumption of fake and pirated goods;
- Consumer perceptions of risk associated with the consumption of these types of goods;
- Processes of normalisation and rationalisation;
- The influence of demographic and product-related factors in determining motivations, perceptions and processes surrounding the consumption of fake and pirated goods;
- Potential mechanisms for increasing public awareness about the risks associated with the consumption of fake and pirated goods and the links to organised crime in order to change consumer attitudes and reduce demand.

Main findings:

- Attitudes and Behaviour
 - Level of public awareness of counterfeit and pirated goods is high:
 - 73% of respondents stated that they had seen counterfeit goods for sale.
 - Consumption of fake goods is fairly common across the UK:
 - 34% indicated that they had purchased counterfeit goods at one time or another.
 - 56% had never bought fake goods and indicated that they are unlikely to buy fakes in the future.
 - 7% of those surveyed had never bought fake goods but thought they might in the future.

- 3% of those surveyed were not sure if they had bought counterfeit goods.
- 13% had bought fakes thinking they were real.
- Counterfeit goods are available through a variety of locations and networks:
 - The main location for the purchase of counterfeit and pirated goods was on holiday abroad.
 - Respondents indicated that a full range of fake goods could also be found at car boot sales, local markets and street vendors.
 - Of those who had purchased pirated computer games, 40% indicated that their purchases were made in local pubs or social clubs.
 - 26% of respondents who had purchased pirated DVDs and CDs also indicated that their purchases were made in local pubs or social clubs.
 - In Northern Ireland, local markets were the main location for the purchase of DVDs and CDs.
- Motivations and Justifications
 - Cost is a key driver for the purchase of fake goods.

Of those respondents who had purchased fake goods in the last 12 months:

- With the exception of toys, the majority indicated that they purchased counterfeit goods because they were cheaper.
- 16% of respondents indicated that they would be unable to afford the genuine product.
- 19% of respondents agreed that buying fakes made their money go further.
- Almost three quarters of all respondents said that they thought genuine goods were overpriced.
- Purchases are not solely based around economic decisions:
 - 56% of respondents who had purchased a fake DVD bought it because they wanted to see a film as soon as possible.
- Fake goods often meet expectations:
 - 21% said they had purchased counterfeit goods because they are of an acceptable quality.
- Risks and Consequences
 - The public are aware that counterfeiting and piracy impacts on the public purse:
 - Almost 80% of respondents agreed that counterfeit goods were cheaper because the producers did not pay tax.

- Good appreciation of the consequences that counterfeiting and piracy has for legitimate business:
 - Just under 77% of respondents agreed that the difference in price between legitimate and fake goods was because counterfeiters did not have the same overheads as legitimate producers.
 - Approximately 81% agreed that the difference in price between legitimate and fake goods was due to the fact that counterfeiters did not incur design, filming or recording costs.
 - 83% indicated that the price difference was due in part to the absence of marketing expenses.
 - Half of the respondents would have purchased a legitimate DVD if the copied version had not been available.
- Degree of ambivalence about the dangers of some fake goods:
 - 20% of respondents thought that goods such as alcohol, cigarettes and toys were of an acceptable standard despite being generally presented as potentially dangerous.
- Changing attitudes and behaviour
 - Messages need to be explained more fully:
 - Respondents indicated that campaigns which demonstrated the links between counterfeiting and piracy and local and organised crime would be effective in changing attitudes.
 - Messages which demonstrated the negative effects on local business and the impact on local jobs were perceived to be the least effective.
 - In Northern Ireland respondents stated that they would be most convinced by messages which highlighted the links between counterfeiting and piracy to organised crime and that the producers of illicit goods did not pay tax.
 - Law enforcement action against the producers of fake products is sending out an effective message:
 - Northern Ireland respondents also indicated that prosecuting the producers of counterfeit and pirated goods would be effective in changing attitudes towards fake goods.
 - Previous campaigns have made an impact:
 - 47% of respondents had seen the campaign launched by the Industry Trust for Intellectual Property Awareness and highlighted the links between DVD piracy and organised crime which was rolled out across the UK in the latter half of 2004.
 - Of those who had seen the campaign, 42% indicated that it had changed their attitude towards fake goods.

12. THE HIDDEN MARKETPLACE: PROTECTING INTELLECTUAL PROPERTY IN THE WORKPLACE

Title of the study/survey: The Hidden Marketplace: Protecting Intellectual Property in the Workplace

Author/Organisation: ICM

Source: <http://www.ipo.gov.uk/pro-ipresearch/ipresearch-policy/ipresearch-policy-attitude.htm>

Year of publication: 2008

Main Focus: Research into IP Infringement in the Workplace: Awareness, Attitudes and Enforcement (UK)

Methodology, scope, sample: Quantitative research of employers in private and public sector organisations and qualitative research among enforcement officers. The research of employers was carried out by ICM who interviewed a random sample of 1009 adults working at manager level 5 or above aged 18+, via an online survey between 28th August – 4th September 2008. The sample included both private sectors businesses and public sector organisations and ranged from sole traders/micro businesses to organisations with more than 500 employers.

Length of the study:

Objective(s): Understand the scale of intellectual property infringement in UK places of work and assist in identifying possible next steps.

Main findings:

- 92% of respondents agreed with the statement: “Protection of intellectual property (IP) is an essential business activity. It protects investment in innovation, with income streams generated by IP rights enabling creators and investors to dedicate time and resources to new projects”.
- The level of agreement to this statement is fairly consistent across all job positions, organisations of different sizes and public and private sectors groups. However, this strongly stated belief in the value of protecting IP reflects an aspiration rather than a reality.
- The survey showed that whilst there is such strong agreement about the value of protecting IP, 40% of respondents that support this view confirm that their organisations do not register trademarks, educate employees in the value of IP, take action against anyone infringing their rights or register patents; only 30% register trademarks; just 27% carry out training of employees in this area; 27% take action against other businesses for infringing IP; and 17% register patents.
- There is strong agreement that IP is a valuable asset and should be protected but these thoughts don't always translate into action.
- DVDs are, jointly with music CDs, the most common product sold in the workplace. 20% of respondents were aware of DVDs being sold by a member of staff in their workplace and of these respondents, nearly 1 in 5 (19%) stated that the DVDs sold were counterfeit and 41% didn't know if they were genuine or pirate copies.
- When asked what they would do if they became aware of counterfeit or pirate products being sold in their workplace, 73% of respondents replied that they would take steps to make sure it was stopped. Whilst revealing that a majority would take positive action, it also shows that there is a significant minority who are disassociated from the issue: i.e. the remaining 27% would either buy the counterfeit or pirate items, do nothing or aren't sure what they would do.

- Businesses tend to resolve this issue internally. Of those businesses that were aware of instances of staff selling counterfeit or pirated items, nearly 1 in 5 advised an external enforcement agency.
- Different business types vary with regard to permitting staff to download and fileshare copyright materials. There are also generational and hierarchical divides in awareness of downloading and file-sharing activity within the workplace.
- Over a quarter of all organisations are not making their employees' aware that they may only download copyright material (e.g. software, films/TV programmes, music etc) with the copyright owners' permission.
- Almost 1 in 5 directors are not taking responsibility for the legitimacy of software used within their business

Interesting questions to use in quantitative questionnaire:

Note: Full questionnaire available in appendix B.

→Q: *Protection of intellectual property (IP) is an essential business activity. It protects investment in innovation, with income streams generated by IP rights enabling creators and investors to dedicate time and resources to new projects.* Please state whether you: strongly agree, slightly agree, neither agree nor disagree, slightly disagree, strongly disagree.

13. STUDENT ATTITUDES TOWARDS INTELLECTUAL PROPERTY

Title of the study/survey: Student Attitudes towards Intellectual Property

Author/Organisation: National Union of Students (NUS) and the Intellectual Property Awareness Network (IPAN)

Source:

http://www.nus.org.uk/PageFiles/12238/2012_NUS_IPO_IPAN_Student_Attitudes_to_Intellectual_Property.pdf

Year of publication: 2012

Main Focus: Investigated student attitudes to, awareness of, and aspirations for, intellectual property (IP)

Methodology, scope, sample: An online survey of 2,146 FE and HE students in the UK.

Length of the study: Large, over 50 pages

Objective(s): Sought to understand how the continued student journey affects demand for information about IP.

Main findings:

- Students felt that knowledge of IP is important to both their education and their future career.
- Students feel it was important to know about IP to ensure everyone receives recognition for their work and ideas, but they do not perceive a strong link between IP and commercial success.
- When asked about their understanding of the phrase 'intellectual property', 1,368 respondents gave answers which showed an understanding of at least some aspects of the term. The remaining 233 (15%) responses did not indicate an understanding of any aspects of IP. While some responses focused on broad concepts, such as ownership (25.0%), rights (8.8%) and originality (4.9%), others mentioned more specific terms such as copyright (18.4%), patents (7.5%) and trade marks (5.3%).
- Students were given a list of topics and asked to select all those they thought were relevant to IP. The topic recognised as relevant by the greatest number of respondents was 'understanding the implications of copyright restrictions', but even this was only thought to be relevant by 75%.
- While the research presented in this report is an important contribution to the poorly understood issue of student attitudes towards, and understanding of IP, further work is needed to build on this and create a reliable research base in this field, including different methodologies, work with a variety of stakeholders and ongoing longitudinal studies. Some options for future research are outlined below:
 - A qualitative study with students to investigate some of the complex issues raised in greater depth, for example: The impact of teaching at primary and secondary level on knowledge and attitudes towards IP at FE/HE level; Key IP information sources and when and how these are used; Reasoning processes leading to (and knowledge supporting) IP decisions.
 - 2. Research to map the extent and scope of current IP teaching within UK FE and HE institutions.
 - 3. Research with academics to identify appropriate methods of support for the delivery of IP education.

- 4. A longitudinal study to track any changes in student attitudes towards, and awareness and understanding of, IP over time.
- 5. Case study, or comparative study, research to assess the impact of industry campaigns on student attitudes and awareness of IP.
- 6. Research among employers or employer organisations to establish employer expectations of, and input into, IP skills among graduates.

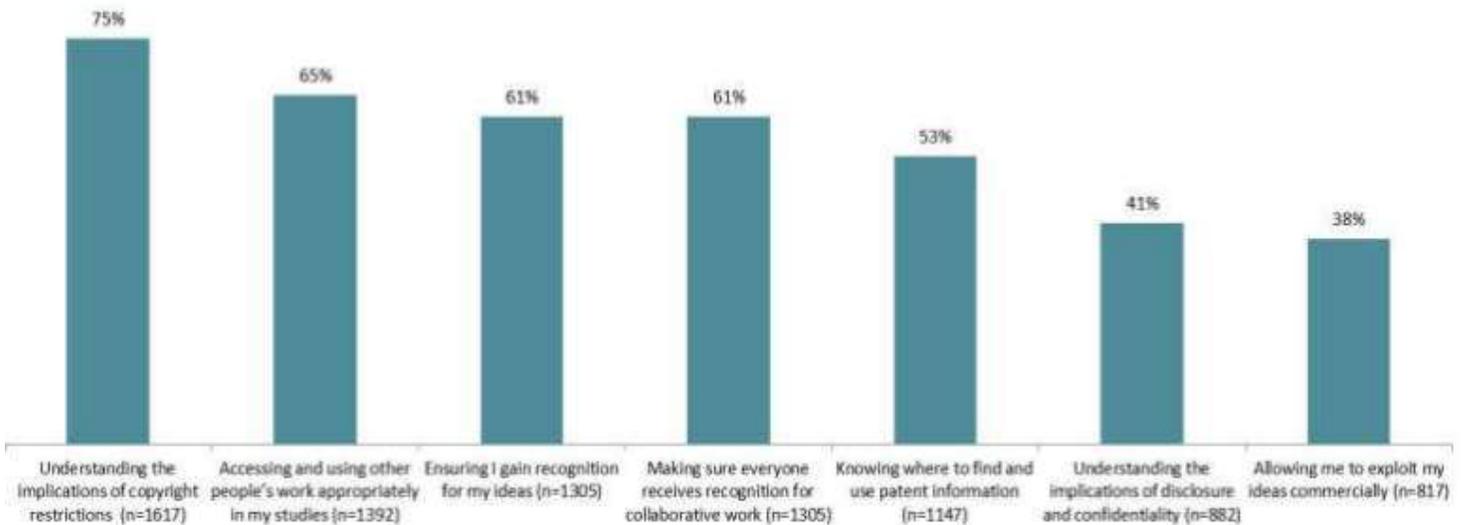
Interesting questions to use in quantitative questionnaire:

→Q: What is your understanding of the phrase 'intellectual property', if any? (n=1601)

- Trade secrets
- Licensing
- Published or made public
- Registration
- Design rights
- Brands
- Should be referenced
- Prevents reproduction without permission
- Protection
- Value
- Originality
- Trademarks
- Legal term
- Patents
- Rights
- Concepts, ideas and creations
- Copyright

→Q: Topics that are considered relevant for IP

Topics that are considered relevant to intellectual property (n=2146)



14. SHADOW MARKET

Title of the study/survey: Shadow Market

Author/Organisation: Business Software Alliance

Source: http://portal.bsa.org/globalpiracy2011/downloads/study_pdf/2011_BSA_Piracy_Study-Standard.pdf

Year of publication: 2012

Main Focus: Piracy habits.

Methodology, scope, sample: A survey of approximately 15,000 computer users in 33 countries that together make up 82 percent of the global PC market. Ipsos Public Affairs conducted the interviews in January and February of 2012 as part of the ninth annual BSA Global Software Piracy Study.

Length of the study: Medium, 16 pages

Objective(s): Part of an annual study from BSA that looks at Global Piracy habits

Main findings:

- The users who say they pirate software most frequently are disproportionately young and male — and they install more software of all types on their computers than do infrequent pirates or non-pirates.
- "This year's BSA Global Software Piracy Study reveal sharp divides between the habits and outlooks of computer users in emerging and developed markets.
- By a wide 71-percent to 29-percent margin, respondents aligned themselves with the idea that "it is important for people who create new products or technologies to be paid for them, because it provides an incentive to produce more innovations. That is good for society because it drives technological progress and economic growth.
- Pirates in mature economies are outliers from the rest of the world's computer users: They show considerably less support for IP rights and protections than everyone else does and less faith in the economic benefits.
- In mature markets, only 20 percent of those who admit they frequently pirate software say the risk of getting caught is a reason not to do it. In emerging markets, the figure is even lower — just 15 percent of pirates appear to be concerned about the risk of getting caught. This suggests there is a need for authorities to ramp up enforcement to send a stronger deterrent signal to the marketplace.
- In 2011, the piracy rate in the EU dropped 2 points to 33 percent in 2011. This was due to 1-point declines in a number of Western European countries, including Italy, Germany, the Netherlands, Sweden, and the UK, and a 2-point drop in France. This progress is significant as European policymakers are embarking on a review of the European IPR Civil Enforcement Directive.

Interesting questions to use in quantitative questionnaire:

→Q: It is important for people who create new products or technologies to be paid for them, because it provides an incentive to produce more innovations. That is good for society because it drives technological progress and economic growth. →Q: Agree or Disagree: IP profits benefit local economies,



people should profit from their ideas, IP creates jobs, IP encourages creativity, it is important to reward innovation.

15. THE FRENCH AND ILLEGAL DOWNLOADING OF MUSIC FROM THE INTERNET

Title of the study/survey: The French and illegal downloading of music from the internet

Author/Organisation: IPSOS

Source: <http://www.ipsos.fr/ipsos-public-affairs/sondages/fran%C3%A7ais-face-au-t%C3%A9l%C3%A9chargement-ill%C3%A9gal-musique-sur-internet>

Year of publication: 2008

Main Focus: Attitudes and perceptions regarding downloading music

Methodology, scope, sample: 1010 people constituting a representative sample of the French population, over 15 years old. The sample has been surveyed by telephone, through IPSOS' panel.

Length of the study: Short: 1 page on the Internet

Objective(s): Commissioned by the Société Civile des Producteurs Phonographiques (the Civil Society of Phonograms Producers), to understand attitudes and perceptions towards downloading music

Main findings:

- 80% believe that artists and authors should be remunerated when their songs are downloaded from the Internet
- Over half of the people surveyed believe that sales have been down in music due to illegal downloading but that it is not the only reason.
- 74% are favorable to stricter laws regarding illegal downloading.

Interesting questions to use in quantitative questionnaire:

→Q: *Today, do you believe that artist and authors should be paid when their songs are downloaded from the Internet?*

→Q: *In the last 5 years, record sales have dropped by half. According to you, is free but illegal downloading from the Internet... Probe: the main cause for this, one of the causes but not the only one, is not the cause, don't know.*

→Q: *Today, an internet-user that downloads music illegally from the Internet is risking a criminal conviction and can be sentenced up to 3 years of imprisonment and to a 300 000 euros fine. Instead, a draft legislation establishes that any internet-user downloading illegally would receive a first warning by email, then a second one by registered letter if he continues. After those warnings, if the internet-user keeps its illegal behavior, his Internet access may be temporarily suspended. Do you fully agree, somewhat agree, somewhat disagree or fully disagree with the draft legislation?*

→Q: *Personally, should you download musical pieces illegally, would you stop doing do if you received those two warnings?*

16. EXPLAINING COUNTERFEIT PURCHASES: A REVIEW AND PREVIEW

Title of the study/survey: Explaining Counterfeit Purchases: A Review and Preview

Author/Organisation: Berlin School of Economics, Germany

Source: <http://www.amsreview.org/articles/eisend12-2006.pdf>

Year of publication: 2006

Main Focus: Intention to purchase counterfeit products

Methodology, scope, sample: The study comprises a first study based on focus groups and a second based on in-depth interviews. First, two focus groups were established with a convenience sample of social sciences students between the ages of twenty and forty from a German university. Based on the results of the focus groups, specific questions were derived related to the new factors which turned out to be relevant determinants for purchasing counterfeit goods. In a second step in-depth interviews were carried out in order to gain further information on the underlying operating mechanisms of these determinants. Altogether, twelve interviews were conducted with persons who had already had experience in the purchase and use of counterfeit products.

Length of the study: 18 pages

Objective(s): The purpose was to review a number of existing studies on the determinants of consumers' intention to purchase counterfeit products, and in doing so, provide an overview of the insights on this topic and identify potential gaps.

Main findings:

- Mood processes can explain why people are more prone to buy counterfeits even if they know about the illegality of their behavior or the lack of post-purchase satisfaction with a product of low quality. Buyers of counterfeit products also try to legitimate their behavior and experience reasons for justifications.
- With respect to the product, we found out that the scarcity of the original product not only influences the value perception of the original brand but also of the faked brand.

17. EXPLORING COLLEGE STUDENTS' ATTITUDES TOWARD COUNTERFEITING: A BEGINNING

Title of the study/survey: Exploring College Students' Attitudes Toward Counterfeiting: A Beginning

Author/Organisation: Siena College, NY

Source:

https://www.siena.edu/uploadedFiles/Home/Academics/Schools_and_Departments/School_of_Business/College%20Students%20and%20Counterfeiting%20by%20Walthers%20et%20al.pdf

Year of publication: 2008

Main Focus: Student attitudes towards counterfeiting

Methodology, scope, sample: 253 paper surveys. The sample included 89 males and 164 females; 140 subjects were business majors, 24 were science majors, and 83 were humanities majors. Fifteen were eliminated based on age.

Length of the study: Small, 6 pages

Objective(s): The attitudes towards counterfeiting for differences based on gender, past purchase behavior, and academic area of study.

Main findings:

- In general there were strong attitude differences between those who have previously purchased counterfeits and those that have never knowingly purchased counterfeits. Both groups did agree however that counterfeits hurt the U.S. economy and the companies that manufacture the legitimate product. Those who have never purchased counterfeits indicated that people who buy and sell counterfeits are criminals. Individuals who had in fact purchased counterfeits believed that the prices of designers were unfair and that the quality of the counterfeit was equal to that of the legitimate product.
- There were significant differences in attitudes towards the quality of counterfeit products and the willingness to pay for non-counterfeit products. Compared to men, women would be more likely to consider the purchase of a counterfeit.

Interesting questions to use in quantitative questionnaire:

→Q: True or False:

- Counterfeit products do not hurt the U.S. economy
- Counterfeit products hurt the companies that manufacture the legitimate product.
- I like counterfeit goods because they demonstrate initiative and ingenuity on the part of counterfeiters.
- I buy counterfeit products because counterfeiters are the “little guys” who fight big business.
- People who buy counterfeit products are committing a crime
- People who sell counterfeit products are committing a crime.
- I buy counterfeit products because the prices of designer products are unfair
- Counterfeit products are just as good as designer products.

18. CONSUMER HOME PIRACY RESEARCH FINDINGS

Title of the study/survey: Consumer Home Piracy Research Findings

Author/Organisation: Future Source Consulting

Source: http://www.wired.com/images_blogs/business/files/dvdpiracy.pdf

Year of publication: 2008

Main Focus: Home Copying Consumer Research Study

Methodology, scope, sample: Online survey of US (3,613) and UK (1,718) consumers

Length of the study: Small, 12 pages

Objective(s): Unveil home copying practices

Main findings:

- If they had not been able to copy, 63% of UK and 77% of US said they would have purchased the DVD.

Interesting questions to use in quantitative questionnaire:

→Q: *If you had not been able to copy, would you have purchased the product?*

19. PRESERVING INTELLECTUAL PROPERTY RIGHTS: MANAGERIAL INSIGHT INTO THE ESCALATING COUNTERFEIT MARKET QUANDARY

Title of the study/survey: Preserving intellectual property rights: Managerial insight into the escalating counterfeit market quandary

Author/Organisation: Villanova University, USA

Source: Link recently broken

Year of publication: 2009

Main Focus: Manager solutions to combat counterfeiting

Methodology, scope, sample: In-depth interviews with United States managers. More than 1,000 firms in industries where seizures of counterfeit products were identified were contacted for participation in this study. An initial sample of 120 firms agreed to participate in the survey. Despite this pre-screening process, 16 in depth interviews for this study were completed.

Length of the study: Unknown

Objective(s): Gauge the efficacy of various anti-counterfeiting tactics to preserve intellectual property rights

Main findings:

- The results indicate that corporate manager's find the practice of encouraging distributors to notify the manufacturer about counterfeits, as well as educating both employees and channel members about the counterfeit problem, to be some of the most effective ways to fight pirates. However, the managers' report many other tactics are futile, including providing financial incentives for distributors to reject counterfeits and stressing the harmful effects of fake goods in advertising.

20. EFFECTS OF COUNTERFEITING ON EU SMES AND A REVIEW OF VARIOUS PUBLIC AND PRIVATE IPR ENFORCEMENT INITIATIVES AND RESOURCES

Title of the study/survey: Effects of counterfeiting on EU SMEs and a review of various public and private IPR enforcement initiatives and resources

Author/Organisation: Simon Rodwell [Hunter Rodwell Consulting], Philippe Van Eeckhout [Contratak S.A.S.], Alasdair Reid and Jacek Walendowski [Technopolis]

Source: http://ec.europa.eu/enterprise/newsroom/cf/_getdocument.cfm?doc_id=4506

Year of publication: 2007

Main Focus: focus on four of the sectors particularly affected by IPR abuse, including auto parts, mechanical engineering, textiles, and toys.

Methodology, scope, sample: 155 small and medium-sized enterprises based throughout the EU, Online survey

Length of the study: Large, 143 pages

Objective(s): Purpose was to analyse whether and how EU-based SMEs protect their intellectual property assets.

Main findings:

- 23% of SME survey respondents considered that their business was affected significantly and a growing proportion felt that the problem was likely to get worse in the next five years.
- 44% of toy manufacturers who took part in the SME Survey and 25% of companies from the mechanical engineering sector, who reported that they were concerned about the counterfeiting of their products posing risks to consumers.
- China was felt to be the main source of counterfeiting, followed by other EU and home markets, then Turkey, other Asian countries and India as the main producers of such goods.

Interesting questions to use in quantitative questionnaire:

→Q: *Are you aware of Chinese government campaigns to improve education on IPR issues?*

→Q: *Which sectors, in order of severity, are most affected by IPR abuse?*

21. CANADIANS ON INTELLECTUAL PROPERTY

Title of the study/survey: Canadians on Intellectual Property

Author/Organisation: Nanos Research on behalf of the Public Policy Forum

Source: <http://www.nanosresearch.com/library/polls/POLNAT-S08-T295.pdf>

Year of publication: 2008

Main Focus: To determine Canadians' opinions on intellectual property and its protection.

Methodology, scope, sample: Random telephone survey of 1,001 Canadians 18 years of age and older. It was completed between April 4th and April 9th, 2008.

Length of the study: Small, 5 pages

Objective(s): Conducted on behalf of the Public Policy Forum to determine Canadians' opinions on intellectual property and its protection.

Main findings: No main findings – just the stat sheet

Interesting questions to use in quantitative questionnaire:

→Q: *On a scale of 1 to 5, where 1 is not at all important and 5 is very important, how important are the following for the future prosperity of Canada?*

Probe: Lowering business taxes; Encouraging discoveries and inventions; Reducing red tape for businesses; Improving training

→Q: *On a scale of 1 to 5, where 1 is strongly oppose and 5 is strongly support, how much do you support or oppose the protection of the intellectual property right for those that make discoveries and inventions or create a unique product?*

→Q: *Why do you have this opinion?*

Probe: It is important to protect inventor's ideas and products; Inventors should get credit for their work; We should encourage leaders/inventions/discoveries; It depends on the product; They shouldn't have control of a market/there should be information sharing; Canada needs to be protected from the US/other countries; This would prevent government from obtaining knowledge; There is a lot of politics around this issue; People will steal from each other if there's no protection etc.

22. CANADIAN SMALL AND MEDIUM SIZED ENTERPRISES (SMES): BASELINE AWARENESS OF INTELLECTUAL PROPERTY

Title of the study/survey: Canadian Small and Medium Sized Enterprises (SMEs): Baseline Awareness of Intellectual Property

Author/Organisation: CIPO; Allan Gregg, Christopher Kelly, Michael Sullivan and Timothy Woolstencroft [The Strategic Counsel]

Source: See PDF (link is no longer available)

Year of publication: 2007

Main Focus: To gauge overall awareness, knowledge and use of intellectual property by Canadian small and medium-sized enterprises.

Methodology, scope, sample: 15 Minute Telephone Survey of 2106 Canadian SMEs. 2.106 senior decision makers of Canada-based small and medium-sized enterprises

Length of the study: Large, 92 pages

Objective(s): CIPO’s Outreach Division needed to develop and implement a baseline measure that will help the organization gauge overall awareness, knowledge and use of IP by Canadian small and medium sized enterprises¹ (SMEs), its primary target group, while evaluating over time the Outreach program’s Effectiveness.

Main findings:

- Mirroring familiarity with the term “Intellectual Property”, just over one-in-three business leaders reported that they are very or somewhat familiar with the three main types of IP protection – copyrights (40%), trademarks (39%) and patents (35%). While one-in-six state they are familiar with trade secrets (17%) and industrial designs (14%), only two-in-five (apx 40%) are not familiar with these forms of IP protection.

Interesting questions to use in quantitative questionnaire:

→Q: *Please indicate how familiar you are with the term Intellectual Property on a scale from 0-10 where 0 means you are not at all familiar, 10 means you are very familiar and 5 is the midpoint.*

→Q: *When you hear the term Intellectual Property what is the first thing that comes to your mind?*

Nothing.....	01
Copyright.....	02
Ownership	03
Patents	04
Software/ Computers/ Technology.....	05
Music/ Books/ Art	06
Ideas/ Information/ Knowledge/ Research	07
Trademarks/ Branding.....	08
Property/ Assets.....	09
Intelligence/ Intelligent People.....	10
Rights	11
Lawyers /Legal issues /Legal documents	12
Security/ Protection/ Privacy.....	13

Creation/ Developed Product/ Invention14
Theft/ Dishonesty/ Fraud.....15
Human resources/ People/ Executives.....16

→Q: On a scale from 0-10 where 0 is not at all familiar, 10 is very familiar and 5 is the mid-point, how familiar would you say you are with the following types of Intellectual Property protection?

- Patents _ _ _ _ _
- Trademarks _ _ _ _ _
- Copyrights _ _ _ _ _
- Industrial designs _ _ _ _ _
- Trade secrets

23. SMES AND THE FIGHT AGAINST COUNTERFEITING

Title of the study/survey: SMEs and the fight against Counterfeiting

Author/Organization: Confédération Générale des Petites et Moyennes Entreprises (General Confederation of SMEs)

Source: <http://www.cgpme.fr/economies/voir/67/resultats-de-la-consultation-cgpme-sur-la-contrefacon/keywords/les-pme-et-la-lutte-anti-contrefacon>

Year of publication: 2007

Main Focus: Perceptions from Businesses on anti-counterfeiting measures and their opinions.

Methodology, scope, sample: It is vague – it only says it was an Online Survey of small and medium-sized companies

Length of the study: Small, 5 pages

Objective(s): To examine what proportion of small and medium-sized companies is affected by counterfeiting, and what measures can be taken to respond to it.

Main findings:

- 40% of respondents affirm that they do not know from whom exactly they can expect assistance, should IP rights violations occur.
- 90% of the SMEs questioned believe that such arrangements would be necessary and useful to help fighting against counterfeiting

Interesting questions to use in quantitative questionnaire:

→Q: *According to you, how could we help SMEs more in their fight against counterfeiting?*

- More information on counterfeit products (especially if coming from Custom representatives, and country by country)
- The creation of email alerts about counterfeit products
- The creation of a specific insurance for intellectual property rights
- Cost of the protection (patent, brand...etc.), especially on an international scale
- More reactivity from the INPI (Institut National de la Propriété Intellectuelle / National Institute for Intellectual Property), for matters related to informing the companies and to patent application.

24. TIME TO CHANGE THE TUNE - CONSUMER RESEARCH BRIEFING ON COPYRIGHT

Title of the study/survey: Time to change the tune - Consumer research briefing on copyright

Author/Organisation: Kantar Media

Source: <http://www.consumerfocus.org.uk/assets/1/files/2010/02/Consumer-Focus-Time-to-change-the-tune1.pdf>

Year of publication: 2010

Main Focus: To survey British consumers about a wide range of copyright related activities - including those that are legal and illegal under current copyright law.

Methodology, scope, sample: 2,026 consumers aged 15 or older representative of the British population, face to face interviews

Length of the study: Medium, 11 pages

Objective(s): establish a comprehensive picture of the copyright related activities consumers engage in.

Main findings:

- Only between 15 and 26 per cent of British consumers thought that format-shifting (Copying a file into another format) was illegal. This means that three quarters of British consumers believe that it is legal, while in fact it is not. We also asked consumers what they thought should be illegal under current copyright law and only between nine and 14 per cent of British consumers thought that format-shifting should be illegal
- Overall the majority of consumers are confused about copyright law, with 73 per cent agreeing that they are never quite sure what is legal and illegal under current copyright law.
- 57 per cent of consumers agree that they should be able to copy copyrighted works for their own use.

Interesting questions to use in quantitative questionnaire:

→Q: *Legal or should be illegal?*

Probe: Copying a CD or DVD you have bought to another format so that you have a copy in more than one location; Copying a CD or DVD you have bought to a computer for your own use; Copied a CD or DVD you have bought to an iPod, mobile phone or any other mobile device for your own use; Recorded a TV programme at home to watch at a later time (on a video recorder or Sky+ for example)

→Statement: I should be able to copy copyrighted works for my own use

→Statement: It's impossible to enforce current copyright law now that we have digital technologies

→Statement: Copyright law should be updated now that we have digital technologies

→Q: Do you think consumers need more information about copyright law?

→Q: Or do you think that copyright law should be updated to better suit current consumer trends?

25. THE GOOD, THE BAD AND THE CONFUSING: USER-GENERATED VIDEO CREATORS ON COPYRIGHT

Title of the study/survey: The Good, the Bad and the Confusing: User-Generated Video Creators on Copyright

Author/Organisation: Patricia Aufderheide [American University] and Peter Jaszi [Washington College of Law] AU School of Communication

Source: http://www.centerforsocialmedia.org/sites/default/files/good_bad_confusing.pdf

Year of publication: 2007

Main Focus: Practices and attitudes on using copyrighted material

Methodology, scope, sample: 51 undergraduate and graduate college students who upload videos online, Online survey, phone/instant messaging interviews

Length of the study: Medium, 11 pages

Objective(s): This study investigates attitudes toward copyright, both from the owner and the new-user side, of a particular swath of producers: college-age students and recent graduates, many of them interested in a career in communication.

Main findings:

- A large minority of these people—42 percent of survey respondents—believe that they have never incorporated any copyrighted material.
- The majority of makers surveyed (54 percent) said that they did not understand when it was permissible to use copyrighted materials at all.

26. COUNTERFEITING IN THE UNITED STATES: CONSUMER BEHAVIOURS AND ATTITUDES

Title of the study/survey: Counterfeiting in the United States: Consumer Behaviours and Attitudes

Author/Organisation: The U.S. Chamber of Commerce partnered with The Gallup Organization

Source:

<http://www.theglobalipcenter.com/sites/default/files/reports/documents/uschambergallupconsumerperceptions.pdf>

Year of publication: 2007

Main Focus: Consumer Behaviours and Attitudes towards Counterfeiting in the United States

Methodology, scope, sample: 4,311 completed interviews among U.S. adults aged 18 and older, including an oversample of 892 in the Los Angeles metropolitan area Computer-assisted telephone interviewing, Interviewing conducted May-June 2007; Based on a sample size of 4,311, the margin of error at a 95% confidence level is +/- 1.5%.

Length of the study: Medium, 36 slides

Objective(s): To understand: the extent of counterfeit purchases in the last 12 months; general information about the people who buy counterfeit items; Estimated revenues lost by manufacturers due to counterfeiting; Estimated tax revenues lost by the U.S. government due to the sale of counterfeit goods; General attitudes and perceptions toward counterfeiting and the laws to curb counterfeiting; Feelings and attitudes toward anti-counterfeiting messaging

Main findings:

- Wide availability continues to be the #1 reason for counterfeit purchases.
- The most effective deterrents are the likelihood of supporting terrorists, the potential for inflicting harm on a loved one, and the possibility of supporting organized crime.
- Few Americans realize the breadth of items sold as counterfeits and the economic impact.

Interesting questions to use in quantitative questionnaire:

→Q: *In the past year, have you personally purchased, copied, or downloaded any of the following products or goods that you know, or suspect, were not genuine or legitimate?*

→Q: *Over the past 12 months, on how many separate occasions did you purchase/download/copy <PRODUCT> that was/were NOT genuine or legitimate?*

→Q: *Were any of the following factors in your purchase of a counterfeit product that was NOT genuine or legitimate?*

Probe: Price for genuine product was too high; Wanted to buy same quality at better price; Easily available; Wanted to buy it earlier than licensed product appeared; Some other reason

→Q: *Would you have purchased the imitation product you previously mentioned you bought or acquired if you knew the seller was...*

Probe: Not paying sales tax; Financially hurting company that produces legitimate product; Using the earnings to bribe government officials; Charging the same amount as for legitimate item; Funding organized crime; Sponsoring a terrorist organization; Distributing a product that could harm you or family member

→Q: *Agree or Disagree:*

- Intellectual property crimes and counterfeiting are a problem for business, but have not yet had a significant impact on the overall economy;
- Intellectual property crimes and counterfeiting are a threat to public health and safety;
- Intellectual property crimes and counterfeiting have caused a significant number of American jobs to be lost

27. UNREAL CAMPAIGN RESEARCH FINDINGS

Title of the study/survey: Unreal Campaign Research Findings

Author/Organisation: INTA

Source: <http://www.inta.org/Advocacy/Documents/Teen%20Research%20Unreal%20Findings.pdf>

Year of publication: 2012

Main Focus: Teen awareness of counterfeit goods

Methodology, scope, sample: Not specified but it says that it was focus group based

Length of the study: Short, 1 page

Objective(s): Shed light on what teens think of counterfeit goods

Main findings:

- Research showed a lack of understanding of the difference between counterfeit goods and piracy and generic brands.
- Most of the counterfeit goods mentioned by teens fell into the categories of fashion or electronics.

28. UPS AND DOWNS: ECONOMIC AND CULTURAL EFFECTS OF FILE SHARING ON MUSIC, FILM AND GAMES

Title of the study/survey: Ups and downs: Economic and cultural effects of file sharing on music, film and games

Author/Organisation: a consortium of TNO Information and Communication Technology (www.tno.nl), SEO Economic Research (www.seo.nl) and the Institute for Information Law (IViR) (www.ivir.nl), and commissioned by the Ministry of Education, Culture and Science, the Ministry of Economic Affairs and the Ministry of Justice of the Netherlands.

Source: http://www.ivir.nl/publicaties/vaneijk/Ups_And_Downs_authorized_translation.pdf

Year of publication: 2009

Main Focus: economic and cultural effects of file sharing

Methodology, scope, sample: a representative survey of 1,500 Dutch internet users, capturing their behavior and motives in downloading and uploading music, films and games. The sample is broadly representative of the Dutch internet population aged 15 upwards in terms of its socio-demographic characteristics and internet usage – with minor deviations. One such deviation was a slight overrepresentation of heavy internet users

Length of the study: Large, 128 pages

Objective(s): Commissioned by the Ministries of Education, Culture and Science, Economic Affairs and Justice with the aim of identifying the short- and long-term economic and cultural effects of file sharing on music, films and games.

Main findings:

- Respondents – and particularly the file sharers among them – feel that free downloading possibilities have a positive effect on the accessibility and diversity of music, films and games
- Most consumers see no difference between paying or not paying for downloads in terms of ease of use (57%), availability (54%) and quality (60%).
- The survey asked file sharers what they felt to be a reasonable price for a music, film or game download. The youngest group cited significantly lower figures than the other age brackets (see Table 4-20)
- Judging by the survey data, we could provisionally conclude that the majority of respondents would not buy more – or less – if file sharing were impossible. The two exceptions to the rule are cinema visits and game sales – markets that would appear to be suffering from free downloading.
- Buying after downloading is not a very frequent occurrence, with most file sharers getting the real thing only once or twice a year. This phenomenon is most prevalent in music.

Interesting questions to use in quantitative questionnaire:

Note: Respondents were asked how much time they spend listening to music, watching films and gaming. If the response was that no time was spent on music, films or games, no further questions were asked.

The questionnaire was structured into a series of general questions about music preferences and listening behaviour, moving on to purchasing behaviour and only then touching on file sharing. Nowhere was there any mention of piracy, with the questionnaire consistently using the term downloading and not making any reference to lawful or unlawful activities.

→Q: **Knowledge of laws and regulations (file sharers)** – *Permitted, Sometimes permitted, Not permitted*
Probe: Downloading without payment, Automatic uploading, Adding uploads

→Q: *Do file sharers care that they are downloading files protected by copyright?*

29. SHOULD WE PUT THEM IN JAIL? COPYRIGHT INFRINGEMENT, PENALTIES AND CONSUMER BEHAVIOUR: INSIGHTS FROM EXPERIMENTAL DATA

Title of the study/survey: Should We Put Them in Jail? Copyright Infringement, Penalties and Consumer Behavior: Insights from Experimental Data

Author/Organisation: Maffioletti, A, Ramello, G.

Source: <http://old.sp.unipmn.it/fileRepository/pubblicazioni/RAMELLO.PDF>

Year of publication: 2004

Main Focus: Consumer purchasing behavior, motivations

Methodology, scope, sample: 4 experiments, 15 participants each. They were all students from a Northern Italian university with similar background.

Length of the study: Large, 100 pages

Objective(s): get new insights on consumers paying special attention to their willingness to pay and to purchasing behavior; on the other hand it wants to find out whether the recently adopted increase in legal measures against consumers by industries can have positive effects on lowering copyright infringement and raising legal demand.

Main findings:

- Lawsuits can effectively lower the rate of copying because they raise the probability of being caught by consumers and thus punished. However, they do not necessarily raise legal sales since the measured consumer willingness to pay is generally lower than the market price for legal products.
- – 95 % of auction subjects and more than 85 % in hypothetical experiment 2 – do not consider it likely that they would be caught infringing copyright.
- The experimental findings seem to recommend that firms adopt a different and more affordable pricing strategy that could have two effects; allowing positive profits, and crowding-out a part of illegal consumption (since consumers do not perceive downloaded/burned music files as cost-free and thus there is some space for substitutability).

Interesting questions to use in quantitative questionnaire:

→Note: In case of the copy, they did not use the word ‘copied’ or ‘unauthorised’ or ‘illegal’ or ‘downloaded’, but the more general form of ‘burned’, which includes different ways of obtaining an infringing CD but does not associate any specific judgment or moral assessment.

→Q: *Do you consider copying a CD illegal? Criminal? Unethical?*

30. THE ECONOMIC BENEFITS OF REDUCING SOFTWARE PIRACY

Title of the study/survey: The Economic Benefits of Reducing Software Piracy

Author/Organisation: BSA

Source: <http://portal.bsa.org/piracyimpact2010/studies/piracyimpactstudy2010.pdf>

Year of publication: 2009

Main Focus: How reducing Software Piracy Boosts Economic Growth

Methodology, scope, sample: Quantifies the impact of reducing PC software piracy in 42 countries. Country-by-country software piracy data is compiled annually for the BSA/IDC Global Software Piracy Study. The model uses PC sales data, software shipments, consumer surveys and other market indicators to determine the total quantity of PC software that was deployed in each market and its commercial value. IDC subtracts the amount known to have been legally acquired from the total, and the remainder is what was pirated.

Length of the study: Medium, 11 pages

Objective(s): Trying to quantify economic losses due to software piracy

Main findings:

- The study finds that reducing the piracy rate for PC software by 10 percentage points in four years would create \$142 billion in new economic activity – more than 80 percent accruing to local industries – while adding nearly 500,000 new high-tech jobs and generating roughly \$32 billion in new tax revenues.
- The economic benefits would increase dramatically if piracy were to drop at a quicker pace. In France, for example, reducing the piracy rate by 10 points in the first two years of the same four-year period would boost associated economic activity and tax revenues by 37 percent.
- If this quicker pace of reducing software piracy were repeated in all 42 countries studied, it could produce \$193 billion in new economic activity by 2013 and generate \$43 billion in new tax revenues.

31. STOPPING FAKES: BUILDING AWARENESS - A PRIVATE SECTOR PERSPECTIVE ON IP PUBLIC EDUCATION CAMPAIGNS

Title of the study/survey: Stopping Fakes: Building Awareness - A Private Sector Perspective on IP Public Education Campaigns

Author/Organisation: APEC Business Advisory Council (ABAC)

Source: http://www.uschamber.com/sites/default/files/international/asia/southeastasia/files/13608ap_ecbookrdc.pdf

Year of publication: 2007

Main Focus: successful public awareness campaigns throughout APEC region on intellectual property

Methodology, sample, scope:

- Study best practices of public awareness campaigns on intellectual property
- Throughout the Asia Pacific Economic Cooperation (APEC) region
- Highlight 11 successful case studies to consider as best practices when implementing a comprehensive strategy.

Length of the study: 34 pages PPT

Objective(s) of the survey:

- Build on APEC's recent capacity-building efforts in effective public awareness campaigns through publishing and disseminating this publication.
- Inspire both business representatives and government officials to deepen cooperation in these campaigns to support comprehensive efforts to protect IPR in APEC economies.

Main findings:

- The attributes necessary to achieve a successful public awareness campaign:
 - a. Implementing clear messages.
 - b. Targeting relevant audiences.
 - c. Promoting the negative consequences, personal or economic.
 - d. Maximizing media exposure.
- A study conducted by IDC, a subsidiary of the International Data Group, in 2005 revealed that a 10% drop in piracy from 61 % to 51 % over 4 years (for Malaysia) would add 5,451 jobs, more than US\$1.2 billion to the GDP , more than US\$240 million in taxes, and more than US\$ 908 million in revenue to local vendors.
- The key to a successful campaign is to engage with the various groups that have common interests and to capitalize on the unique strengths and resources of each one. Industry associations, membership groups, and education organizations have established networks of outreach that can be used as target audiences for specific campaigns. The same groups also have ground-level understanding of the IP issues affecting their memberships. Invested parties, including government agencies, should work to recognize existing skills and maximize resources toward creating the most effective outreach strategy.

Interesting questions to use in quantitative questionnaire:

→Q: *Do you think in food and agriculture industry, intellectual property is as important as in automobiles and electronics?* →Q: *If you find pirated songs and movies on the Web, will you inform the government department through a password-protected website set up by the government?*

32. THE FRENCH AND THE DANGERS OF COUNTERFEITING

Title of the study/survey: The French and the dangers of counterfeiting

Author/Organisation: UNIFAB - IFOP

Source: http://www.ifop.fr/media/poll/2030-1-study_file.pdf

Year of publication: 2012

Main Focus: French people and counterfeiting

Methodology, scope, sample:

- Sample of 999 people, representative of the French population over 18 years old.
- The representativeness of the sample is guaranteed by using the gender, age and activity quota method, after stratification by region and category of city.
- The interviews have taken place through self-administrated online questionnaire (CAWI – Computer Assisted Web Interviewing).

Length of the study: 39 pages PPT

Objective(s): Analyze the behavior and mindset of French people on counterfeit and the risks related to counterfeiting

Main findings:

- Today, French people are aware that they may be exposed to counterfeit products in all areas, although the idea people have of it mainly focused on the area of luxury product, and to a less important extent, to audiovisual supports.
- The study reveals that 29% of respondents have already purchased counterfeit products, which is 5% less than in 2005.
- An emphasis can be made on the fact that 37% of respondents have already been biased, thinking they were buying an authentic product. French people know that today, counterfeiting can be found in all areas, and 9 people out of 10 are aware that purchasing counterfeit products represents a risk, which shows a greater awareness of the phenomenon.
- Actively participating to this illegal traffic, Internet is one of the main purchase channels for counterfeit goods, tied for second with street vendors, and after fairs and markets. Among the buyers of counterfeit products, one out of two is led to the counterfeit item by a search engine.
- The people that were interviewed have a more realistic vision today of what illegal downloading is: over a half of them (55%) consider it as being some kind of counterfeiting.

Interesting questions to use in quantitative questionnaire:

→Q: *According to you, what are the product categories that may be affected by counterfeiting, in the following list?*

Probe : (Computer softwares / Electronic devices / Paraphernalia products / Wines and spirits / household appliances such as robots, food choppers, coffee machines, toasters / Furniture and decorative items / Medical and paramedical equipment / Beauty products such as razors, soap / veterinary products / Music instruments / Gardening and do-it-yourself tools / Food products in general / Flowers and fresh fruits)

→Q: According to you, does the market of counterfeiting have negative, positive or no consequences for the authentic brands / companies?

→Q: As far as you are concerned, do you believe that consumers have a part to play and a responsibility to take in the fight against counterfeiting?

→Q: Personally, what kind of communication campaign do you think is more efficient to fight against the purchase of counterfeit goods?

Probe: (Communication about health-related or security-related dangers for the consumers / Communication about the sentences that can apply to the buyers of counterfeit products / Communication about the consequences on the French job marketplace / Communication about the bad quality of counterfeit products / Communication about the negative consequences of the counterfeit market on the companies/the Economy / Communication about the relations between counterfeit producers and the mafia/organized crimes mobs / Communication about the work conditions of an worker making counterfeit products)

33. SURVEYS ON CONSUMERS' AWARENESS AND ATTITUDES IN RELATION TO COUNTERFEITING IN HUNGARY

Title of the study/survey: Surveys on Consumers' Awareness and Attitudes in Relation to Counterfeiting in Hungary

Author/Organisation: Hungarian National Board Against Counterfeiting (NBAC) in Hungary

Source: http://www.wipo.int/meetings/en/doc_details.jsp?doc_id=218383

Year of publication: 2012

Main Focus: Awareness and attitudes on counterfeiting in Hungary, and spotlight on students

Methodology, scope, sample:

- NBAC was the first to initiate a nationwide representative consumer survey in connection with counterfeiting in 2009, which was repeated in 2010, 2011 and 2012.
- While the first survey in 2009 focused only on consumer attitudes – by putting forth the conditional question “Would you buy a counterfeit product?” – the surveys in 2010, 2011 and 2012 included questions in respect of specific consumer purchases, reflecting actual practice vis-à-vis principles. In order to better understand the public opinion related to counterfeiting, the survey in 2011 was extended by including questions on the importance and originality of branded products, and also on the impact of the economic crisis. In 2012 new questions on the Internet users' attitudes towards content under copyright protection were included.
- Two surveys:
 - Survey on consumers' awareness and attitudes in relation to counterfeiting - conducted yearly since 2009
 - Nationwide representative consumer survey – yearly since 2009
 - Omnibus survey – TÁRKI Social Research Institute
 - Sample size of 1000 representative individuals aged 18+
 - Personal interviews
 - Online survey on students' awareness in relation to counterfeiting, especially the online use of copyrighted content - conducted in 2011
 - Nationwide survey in the Hungarian secondary schools
 - Spring 2011
 - Online questionnaire – Free Association Research Company
 - A sample of 17345 students from 241 Hungarian secondary schools
 - Aged between 14 and 20 (50% are between 14 and 16)

Length of the study: 11 pages word document/36 slides

Objective(s): Learn the Hungarian consumers' attitudes, opinions and behaviors related to counterfeiting

Main findings:

- One-quarter of Hungarian consumers would be open to buy counterfeit products.
- Counterfeit clothes are the most popular. In 2012, half of the respondents, less than in the previous year, showed some willingness to buy new clothes illegally bearing trademarks; the other half of them definitely refused it. Similarly to the previous years, in the case of clothes consumers do not always regard non-original products as counterfeit. Although people may refuse to buy counterfeit products, clothing is still considered in a different way.
- Young people are most open to the purchase of counterfeit products. The younger someone is, the more likely he/she is to buy counterfeit CDs and DVDs. 43% of the young people (under 30), 31% of the young middle-aged people (between 30-45), 19% of the old middle-aged people (between 45-60) and 6% of the old people (over 60) are open to the purchase of counterfeit CDs

and DVDs. Not surprisingly, age has a significant influence on the demand for copied and downloaded computer programs, too.

- Main motive for buying counterfeit products: lower price. When purchasing products, the Hungarian customers are not interested in brands; brands are not important at all to half of the respondents (Chart 6). Only one-fifth of the respondents look for a product bearing a certain brand name. They are typically young people, secondary school graduates or residents of the capital. Residents of the relatively poorer regions, those having no more than elementary school education, and old people show a below average interest in branded products. While in 2011 almost half of those in favour of branded products agreed that what they wear should be original, this ratio decreased to 40% in 2012. For almost one-third of them this continues not to be important.
- Most people are aware of the dangers of counterfeiting. The overall negative social perception of counterfeiting is supported by the fact that more than two-thirds of the Hungarian population keep their counterfeit purchases as a secret, and only 10% would boast of their good bargain. This year approximately the same proportion of the respondents is measured to be boastful or secretive, respectively, as last year. Among the older group, the ratio of those who boast of their counterfeits purchased for next to nothing is higher (13%) than the average (10%), while among the residents of county seats those who take pride in their good bargains are under-represented (7%).
- Legal online services are hardly known in Hungary:
 - 22% of the respondents think that it is not recognizable that music, movies or other content have been posted on the internet by legal means.
 - Only 45% of the respondents know sources on the internet where it is possible to listen to or download music legally.
 - 70% of those who know such websites use them.
- Online intellectual property right infringements: half of the respondents would definitely not pay for downloading content from the Internet.
- For students, convenience, free use and availability are the most important reasons for downloading.
- Computer security risks are the most mentioned potential negative effects by students

Interesting questions to use in quantitative questionnaire:

Note: See full questionnaire

→ About placing the responsibility on the customers of counterfeit products Q: *Do you agree with the possible introduction of legislation on punishment of customers of counterfeit products?*

→ Q: *Do students care whether they use legal or illegal websites for downloading?* Probe: I care about using only legal sources; I do not care whether it is legal or illegal to download the content if I need it.

34. ONLINE COPYRIGHT INFRINGEMENT TRACKER BENCHMARK STUDY Q3

Title of the study/survey: Online copyright infringement tracker benchmark study Q3 2012

Author/Organisation: Ofcom – UK

Source: <http://stakeholders.ofcom.org.uk/market-data-research/other/telecoms-research/copyright-infringement-tracker/>

Year of publication: 2012

Main Focus: consumer tracking study into the extent of online copyright infringement, as well as wider digital behaviors and attitudes, among people aged 12+ in the UK.

Methodology, scope, sample:

- A hybrid online and face-to-face survey methodology on a very large sample size (4400 individuals)
- It includes both older children (12-15 year olds) and adults who use the internet less frequently to get a nationally representative sample of UK individuals aged 12+.
- provide as comprehensive a dataset as possible
- Questionnaire: <http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/online-copyright/Questionnaire.pdf>

Length of the study: 93 pages PPT

Objective(s):

- To measure online copyright infringement levels (alongside lawful activity) among UK consumers and monitor changes on a quarterly basis.
- To gain deeper understanding of attitudes towards copyright infringement.
- To monitor awareness and effectiveness of educational campaigns.
- To assess awareness and attitudes towards availability of lawful alternatives.

Main findings:

- One in six (16%) UK internet users aged 12+ were estimated to have downloaded or streamed/accessed at least one item of online content illegally over the 3 month period May-July 2012. A quarter of these (4%) only consumed illegal content.
- Levels of infringement varied significantly by content type; our survey indicated that 8% of internet users aged 12+ consumed some music illegally over the three month period, while 6% did so for films. For video games and computer software the figure was just 2%.
- When looking only at those internet users who had consumed any content online over the three month period, 31% of those consuming any film content and 23% of those consuming any music content had done so illegally. Books had the lowest incidence of illegal consumption among those who had consumed any e-books online, at 11%.
- Online copyright infringers across all the content types were more likely to be male (58%), 16-34 (64%) and ABC1 (62%).
- Overall volumes of illegal content consumed online varied by category. Volumes were highest for computer software (47% of all computer software products consumed online were estimated to

be illegally obtained), followed by films (35%) and music (26%), whereas it was lowest for books (12%).

- The survey data shows that for music, film and TV programmes, those who consumed a mixture of legal and illegal content claimed to spend more on that type of content over the 3-month period than those who consumed 100% legally or 100% illegally.
- When asking infringers why they download or stream/access content illegally, the most common reasons cited for doing so were because it is free (54%), convenient (48%) and quick (44%). Close to a quarter (26%) of infringers also said they do it because it means they can try before they buy.
- Factors that infringers said would encourage them to stop infringing included the availability of cheaper legal services (39%), if everything they wanted was available legally (32%) and if it was clearer what is legal and what isn't (26%).
- Regarding the threat of a letter from their ISP, 22% indicated that a letter suspending their internet access would put them off, falling to 16% for a letter informing them their account had been used to infringe, and 14% for the restricting of internet speed.
- Forty four per cent of all internet users aged 12+ claimed to be either 'not particularly confident' or 'not at all' confident in terms of what is legal and what isn't online. Confidence was lower amongst females (51%) and C2DEs (48%). Although the proportion increased with age, 12-15 year olds (42%) claimed confidence was lower than all other age groups up to the age of 44.
- The most commonly cited indicator of the legality of a website was a reputable/well-known brand.

35. ONLINE COPYRIGHT INFRINGEMENT TRACKER WAVE 3

Title of the study/survey: Online Copyright Infringement Tracker Wave 3

Author/Organisation: Ofcom

Source: http://stakeholders.ofcom.org.uk/market-data-research/other/telecoms-research/copyright-infringement-trackerw3/?utm_source=updates&utm_medium=email&utm_campaign=OCI-Wave3

Year of publication: 2013

Main Focus: Consumer tracking study into the extent of online copyright infringement in the UK

Methodology, scope, sample: Sample of 5, 246 UK 12+ population. The study looks at six main types of online content music, film, TV programmes, books, video games and computer software and for each of these assesses levels of infringement. Mixed methodology of online survey and face-to-face interviews. The survey covers the period from Nov 12 to Jan 13. Fieldwork took place between 23rd – 27th January 2013.

Questionnaire: <http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/online-copyright/w3/questionnaire.pdf>

Length of the study: Large

Objective(s): Study commissioned by Ofcom and undertaken by Kantar Media. It is the third in a series of research waves intended to generate benchmarks and time series relevant to the access and use of copyright material online.

Main findings:

- Overall there was an increase in terms of general online consumption since W2. The proportion of internet users aged 12+ who consumed any of the six content types in the past three months increased from 57% to 60%.

Levels of copyright infringement

- Despite the level of copyright infringement remaining stable across all content types compared to W2, there was a small but (just) significant increase among all internet users aged 12+, meaning that overall infringement increased from 16% to 18%.
- Among those who consumed content online, the '100% illegal' group decreased compared to W2 for both music (from 17% to 14%) and films (from 26% to 20%); the latter was accompanied by a rise in the 'mix' group for films (from 10% to 14%).

Payment

- There was an increase from W2 in the proportion of people who claimed to pay for all of the TV programmes they consumed online in the past three months (from 6% to 10%), with '100% free' falling from 87% to 82%.
- There was also an increase in the proportion who consumed a mix of paid and free films (from 15% to 20%). The rise in general online film consumption appeared to drive an increase in the percentage of all internet users aged 12+ who consumed any films for free (although this is similar to the levels shown in W1, covering the period May – July 2012, at 15%).

Attitudes towards digital activities and infringement

- Several of the motivating factors for infringing decreased compared to W2. These included convenience and speed, although these still remained the second- and third-highest reasons cited.
- There were no significant changes from W2 in terms of factors that would encourage people to stop infringing.
- The 'fear of getting caught' fell slightly from W2 (from 12% to 9% as a motivation for using paid services over free ones).

Online services

- Among infringers, email was the only service that showed a significant increase in use for consumption or sharing of content since W2 (from 14% to 21%), while ITV Player fell from 25% to 21%. Facebook increased significantly among the '100% legal' group, from 14% to 17%.
- Awareness of several lawful services was higher than in the W2 results, possibly reflecting increased marketing activity over the festive period. The most significant difference was for the Blinkbox video on-demand service from Tesco.

Wave 3 key findings

Levels of infringement

- We estimate that one in six (18%) UK internet users aged 12+ consumed at least one item of online content illegally over the three-month period November 2012 – January 2013. Around a third of these (5%) exclusively consumed illegal content.
- Levels of infringement varied significantly by content type; our survey indicated that 10% of internet users aged 12+ consumed at least some music illegally over the three-month period, while 7% did so for films. For TV programmes, video games and computer software these figures were 6%, 2% and 3% respectively, while for e-books it was 1%.
- If instead of looking at 'all internet users aged 12+' we use as our base 'all internet users who consumed content online over the three-month period', we find that 30% consumed at least one item of content online illegally. Furthermore, 33% of those who consumed film, and 26% of those who consumed music, did so illegally, while the lowest incidence of illegal consumption was among online book consumers, at 8%.

Volumes of infringement

- Overall volumes of illegal content consumed online varied by category. We estimate that 280 million music tracks were consumed illegally during the period covered. This was followed by TV programmes (52 million), films (29 million), and e-books (18 million); computer software and video games were equally lowest at 7 million.
- Across all consumers of illegal content, the median number of files downloaded or streamed illegally was eight. Music had the highest median score across the six content types (12 tracks – roughly the equivalent of an album). Films, TV programmes and books each had a median score of four, while computer software and video games had the lowest, at two.
- A higher proportion of films (28%) were consumed illegally than for any other content type. This was followed by music (22%) and e-books (18%), and was lowest for computer software (12%).

Services used for consuming content

- Several services were used by a significantly higher proportion of those who had infringed at all than those who had consumed 100% legally. This applied both to licensed and unlicensed services. This was reflected in the mean number of services used, which stood at 5.7 services among infringers compared to 3.6 for non-infringers.
- Thirty-five per cent of those who consumed any content illegally claimed to use 'peer-to-peer' services; this figure was 6% for those who indicated that all content was consumed legally. The figures for 'cyberlockers' were 12% and 2% respectively.
- Twenty per cent of infringers claimed to have used uTorrent in the past three months, more than any other 'unlicensed' service.

Demographics

- Across all content types, those who downloaded or streamed illegally were skewed towards males (59%), those under 34 (68%), and ABC1s (59%). Although this balance does reflect the demographic make-up of those who consumed digital content online in general (whether lawfully or not), compared to non-infringers there are noticeable differences – the latter are more likely to be female (53%), over 34 (53%), and are even more likely to be ABC1 (69%) than the infringers.

Spend

- Data from the survey showed that for music, films and TV programmes, those who consumed a mix of legal and illegal content claimed to spend more on that particular content type over the three-month period than those who consumed either 100% legally or 100% illegally.
- By contrast, for the other three content types – computer software, books and video games – those who consumed content exclusively legally claimed to spend more than infringers.

Reasons for infringing

- The most commonly cited reasons for infringing were because it is free (48%), convenient (39%) and quick (36%).
- Close to a quarter (24%) of all infringers said they do it because it means they can try before they buy, rising to 28% for those who consumed both legal and illegal content. However, when asked directly, 47% of infringers indicated that they had previously accessed for free some of the digital and physical content they went on to pay for.

What would make infringers stop?

- The top three factors that infringers said would encourage them to stop included the availability of cheaper legal services (28%), if it was clearer what is legal and what is not (24%), and if everything they wanted was available legally (22%). All factors were mentioned by a higher proportion of those who consumed a mix of legal and illegal content than by those who consumed content exclusively illegally, with 16% of the latter insisting that nothing would encourage them to stop.
- Sixteen per cent of all infringers indicated that they would be put off 'if my ISP sent me a letter saying they would suspend my internet access', falling to 12% for both 'if my ISP sent me a letter informing me my account had been used to infringe' and 'if my ISP sent me a letter saying they would restrict my internet speed'.

Levels of consumer confidence about what is and is not legal online

- Forty-one per cent of all internet users aged 12+ claimed to be either 'not particularly confident' or 'not at all' confident about what is and is not legal online. Lack of confidence appeared more prevalent among females and C2DEs. i.e. those less likely to participate in all forms of online

activity (legal and illegal). Although the lack of confidence generally increased with age past 25, 12-15 year olds (35%) and 16-24 year olds (to a lesser extent at 32%) showed lower confidence.

- The most commonly-cited indicator of the legality of a website was a reputable/well-known brand (28% stated this without being prompted). Examples include where a service was provided through a company's own website (e.g. BBC iPlayer), or where a service is large and well-known (e.g. iTunes).

Interesting questions to use in quantitative questionnaire:

Q.1B *Have you ever streamed or accessed any of the following through the internet?*

36. PERCEPTIONS OF INTELLECTUAL PROPERTY: A REVIEW

Title of the study/survey: Perceptions of Intellectual Property: a review

Author/Organisation: Roya Ghafele PhD / Haas School of Business, UC Berkeley

Source: See PDF

Year of publication: 2008

Main Focus: a review of the perceptions and general understanding of intellectual property

Methodology, scope, sample:

- A random keyword search produced a selection of newspaper articles, press releases, academic papers, speeches of policymakers and documents of various international organizations, business and consumer organizations and NGOs.
- Written documents were analyzed according to the themes and context in which terms such as “intellectual property”, “intellectual property rights”, “patents, copyright, trademarks” are being used.
- A text corpus was put together that could be analyzed, structured and categorized

Length of the study: 42 pages long PDF

Objective(s): Analyze the views, perceptions and general understanding of intellectual property

Main findings:

- While it is difficult to document silence, the unspoken is sometimes more telling than the outspoken. IP is still unknown to many, particularly key decision-makers. Policy makers would not view IP as an issue with which to win votes. Equally, corporate CEOs would not necessarily say that it is IP that makes or breaks their business success, making it hard to raise awareness of the necessity to adequately manage intangible wealth.
- A remarkable polarization of positions, where NGOs can be found at one extreme and business at the other. The positions are clear and straightforward. According to the material assessed, none of the actors takes a position that would reflect the enabling opportunities of the IP system as well as potential threats it poses to the disadvantaged of the global economic system.
- The TRIPs agreement marks the era of a new form of discourse on IP. The treaty can therefore be considered as a catalyst provoking a shift in perspectives. In this context IP becomes an increasingly overloaded concept and is by many seen as a sort of gatekeeper to postcolonial aspirations. Moral questions are repeatedly asked and the concept of IP gets intertwined with catchy policy issues such as globalization and public health. While at the national level IP remains more or less a technical non-issue, at the international level it increasingly contributes to heated debates.
- Contemporary IP talk derives much vocabulary from the domain of war, military and football. Proponents of the IP system as well as anti-IP activists, repeatedly use vocabulary such as “war”, “fight” “defeat”, “combat”, “win” or “lose”. This type of language not only reveals that IP seems to turn increasingly into a global battlefield but also that neither side is proactively looking for solutions and joint approaches to problems of global concern. This is to be regretted since battles only create more casualties which, I believe, is in no-one’s interest. Further research may

therefore evolve around questions such as managing IP in the public interest or the role of IP in public private partnerships for health or environmental protection.

Interesting questions to use in quantitative questionnaire:

→Q: *In your opinion, does IP mainly serve wealthy corporations or reward individual inventors?*

→Q: *In your opinion, does IP prevent development or encourage development?*

37. SURVEY ON DIGITAL CONTENT USAGE 2012

Title of the study/survey: Survey on Digital Content Usage 2012

Author/Organisation: Bundesverband Musikindustrie e. V. (BVMI – the German national group of the IFPI), the German book trade association and the German Federation against Copyright Theft (GVU).

Source: http://www.musikindustrie.de/fileadmin/piclib/presse/Dokumente_zum_Download/DCN-Studie_2012_engl_Presseversion_Final.pdf

Year of publication: 2012

Main Focus: German user behavior and consumer attitudes to digital content copyright infringement

Methodology, scope, sample:

Methodology:

1. Survey within GfK Media*Scope
2. Subset 'Onliners' – additional survey in the GfK ASK Panel

Sample:

1. 10,000 people, representative of 63.6 million Germans aged 10 and older
2. 3,000 people, representative of 46 million 'online' Germans aged 14 and older

Length of the study: 39 pages PDF

Objective(s):

- Determine current inventory of hardware equipment and storage spaces
- Analyse user behaviour when downloading and streaming media content from the internet
- Analyse user behaviour when storing media content
- Analyse user behaviour when copying / recording media content
- Consumer attitudes to copyright infringement

Main findings:

- More and more Germans are acquiring music, movies, TV series, e-books and audiobooks directly from the internet. Well over two thirds of the population feel that the legal online range of music (81 percent), e-books (72 percent) and video content (69 percent) on offer is sufficient. There has been a clear shift regarding the preferred technologies: besides traditional downloads, streaming sites are increasingly being used. But people very rarely use online storage space, including the legal options offered by sharehosters, for personal media storage.
- More than a third of all Germans used media content online or downloaded it in 2011. This represents an 11% year-on-year increase to 22.1 million people. 14.8 million people streamed media content in 2011 and 16.3 million people downloaded music, e-books, audiobooks, movies or TV series. 7.2 million people (44.2% of media downloaders) used legal download sites only. 3.1 million people use illegal download sources (19% of media downloaders). 23% never use legal offers, i.e. use only illegal sources or Web sites in the legal grey area. Nearly half of all media downloaders used streamripping, which shows that this form of use has now become firmly established. Illegal streaming portals for films are the most frequently used source for 2.5 million people.
- Consumer awareness of which offerings are illegal is rising steeply overall. Public knowledge about illegal movie streaming portals and P2P networks in particular has increased strongly. 97% of the population knows that offering or downloading copyrighted media content on/in P2P networks is not allowed. Measures against copyright infringers are increasingly approved by the

population, especially if they are targeted against those who offer copyrighted works. Most people feel a fine is appropriate. Nearly three quarters of the population think it would make sense for the provider to issue a warning before legal action is taken. 57% of the population believe in the effectiveness of warnings. Well over two thirds of the population feel that the range of music, e-books and videos legally available online is sufficient. 70% of the populations indicate that one advantage of using legal offerings consists of supporting artists and originators. Among users of illegal sources, this share drops to just 55%.

Interesting questions to use in quantitative questionnaire:

→Q: *Have you heard that downloading or sharing copyrighted media content online can lead to serious legal action being taken?*

→Q: *Do you think it would make sense for people who illegally download content from the internet to receive a warning from their provider (internet connectivity provider) before legal steps are taken?*

38. HADOPI, CULTURAL GOODS AND USES OF THE INTERNET: PRACTICES AND PERCEPTIONS OF FRENCH INTERNET USERS

Title of the study/survey: Hadopi, cultural goods and uses of the Internet: practices and perceptions of French Internet users («Hadopi, biens culturels et usages d'Internet: pratiques et perceptions des internautes français.»)

Author/Organisation: IFOP for Hadopi

Source: <http://www.hadopi.fr/sites/default/files/page/download/hadopiTO.pdf>

Year of publication: 2011

Main Focus: Level of awareness of French Internet-users regarding the Law, their reactions, and their legal and illegal consumption of cultural goods.

Methodology, scope, sample:

- An online quantitative survey of two independent samples representative of the population of French Internet users (that is to say 67% of the French population over 15 years old, according to IPSOS Media's Profiling survey held in October 2012 / 70% of the French population over 11 years old according to a survey held by Mediametrie in July 2010).
- From October 25th to November 2010, through an online access panel, the company TOLUNA interviewed a representative sample of French Internet-users over 15 years old (following the quota method from the Credoc Survey, June 2009)
- 2 687 people were interviewed, divided into two samples:
 - Sample n°1: 1 624 Internet-users were asked to evaluate their personal practices regarding illegal consumption of cultural goods, then to evaluate the behavior they thought other French users had (projective questions)
 - Sample n°2 (control sample): 1 063 Internet users were asked to evaluate the behaviour of French Internet users regarding the illegal consumption of cultural products.

Length of the study: 83 pages PPT

Objective(s):

- To get an overview of the situation regarding perceptions and practices related to the legal and illegal consumption of cultural goods by Internet users, to evaluate their level of awareness regarding the Law and its consequences.
- Evaluate their level of knowledge and awareness with Hadopi instance and its goals.

Main findings:

- Hadopi enjoys a strong level of awareness among respondents. More or less 45% of the Internet users agree to the positive claims regarding its missions (accuracy and efficiency on individual behavior). Many respondents also agree with the negative claims (not legitimate and assumed impact on illegal consumption in general). It is interesting to underline the fact that a third of the respondents have no opinion, and must be expecting something, whatever question they had to answer.
- Regarding security matters, three quarters of the population know they should secure their Internet access; this knowledge is more important among people who declare illegal practices than other people.

- Regarding the cultural offer on the Internet, there is confusion between what is legal and what isn't, especially as some illegal services are charged for. Labeling is the 3rd most important factor that enables to determine whether an offer is legal or not. 75% of Internet users spend an average of 36€ per month on cultural goods (including mail-order purchases). Internet users who recognize having illegal practices on the Internet tend to have higher average expenses. The main factors that they name regarding the consumption of legal materials are the price and the choice.
- Half of the Internet users recognize having illegal practices on the Internet (at least once), whereas 95% of respondents believe that French Internet users have illegal practices on the Internet. A noticeable gap exists between the behavior people declare and the ones they believe that others have. Illegal practices on the Internet are mainly concentrated on people aged 15-39, mostly men, and there is no significant difference between the Paris area and the rest of the country. This trend doesn't slow down and is getting more diversified.
- Regarding informatics equipment, people that recognize having illegal practices are usually better equipped, especially regarding the possession of external hard drive, smartphones and portables audio/video devices.
- Regarding the impact of these practices, nearly half of the Internet users that recognize having illegal practices on the Internet affirm that Hadopi will not impact on their behavior, while a third of them claim they would be ready to change and a fifth (17%) has no opinion on the matter. Hadopi will start implementing its measures in an open context.

39. SECOND WAVE OF THE SURVEY “HADOPI, CULTURAL GOODS AND INTERNET USES: PRACTICES AND PERCEPTIONS OF FRENCH INTERNET USERS”

Title of the study/survey: Deuxième vague du baromètre "Hadopi, biens culturels et usages d'Internet : pratiques et perceptions des internautes français" (Second wave of the survey “Hadopi, cultural goods and Internet uses: practices and perceptions of French Internet users”)

Author/Organisation: IFOP pour Hadopi

Source: <http://hadopi.fr/sites/default/files/page/pdf/HADOPI-160113-BU2-Compleet.pdf>

Year of publication: 2013

Main Focus: The practices and perceptions of French Internet users.

Methodology, scope, sample:

IFOP (Institut Français d'Opinion Publique; *French Institute of Public Opinion*), led an ad hoc quantitative survey of a national representative sample of 1 530 Internet users over 15 years old, coming from the Survey Sampling International panel.

The representativeness of the sample was secured using the method of the quotas (informational guidelines provided by IFOP – omnibus telephone survey), based on the following criteria: sex, age, Professional Socio-Category of the person, region of residence and frequency of the connections online.

The survey took place from September 28th to October 11th 2012. The fact that the study was led over a wide time period of two weeks is deliberate, in order to intermix the profiles of respondents (from the most reactive ones to answer an online survey to the less reactive ones, from daily Internet users to more occasional users), while keeping on filling up regularly and homogeneously the quotas that were set.

Length of the study: 63 pages PPT

Objective(s): In order to get an overview of the practices regarding legal and illegal consumption of French cultural goods, the Hadopi held to measuring points from October 25th to November 20th 2010 and from March 23rd to April 1st 2011.

In order to make this system sustainable when it comes to studying the evolutions of practices, Hadopi created, using these two first studies, a barometer of the uses and practices of Internet users regarding their consumption of cultural goods online.

Main findings:

- Level of legal/illegal consumption:
 - 78% of dematerialized cultural goods users say they consume them exclusively in a legal way. This figure appears to be on the rise compared to December 2011 (71%). 15% of respondents recognize having illegal online practices (mixed or exclusive); this number is declining compared to December 2011. This new trend can also be found among dematerialized cultural good users aged 15-24, although illegal practices are more widely spread among them, they declare consuming less in exclusively illegal ways than before (80% v.s 72% in December 2011). Finally, 87% of respondents use legal websites.
 - The raise in legal consumption seems to benefit the music sector, which appears to be more consumed in a totally legal way (80% v.s 72% in December 2011), as well as pictures (94%), video games (84%) and books (87%). Yet, TV shows are more concerned by illegal consumption than the previous year, and when having a look at the websites

named by Internet users (open question), illegal consumption of cultural goods focuses on videos and TV shows.

- Motivations:
 - With no distinction as to the cultural good nor to the legal/illegal nature of the use, most cultural goods are consumed in ways exclusively or mainly free of charges. Regarding the factors discouraging the legal consumption, price is still the main reason (75% v.s 69% in 2011).
 - For over a half of the respondents (51%), the first motivation for having legal consumption practices is to be in full compliance with the law. The respect of the creators is an issue on which the respondents agrees, whether they declared having legal or illegal practices: it is the first motivation for having legal consumption practices for Internet users that have illegal practices on the Internet (38%), and it is the second motivation referred to by those that have declared legal practices (47%)
 - 5 types of Internet-users populations can be identified among the respondents, regarding their consumption practices of dematerialized cultural goods:
 - The “pragmatics (22% of Internet users, or 33% of consumers): they come from a higher than average Professional Socio-Category, Internet is first and foremost a functional tool for them. They have great use of softwares and occasionally of music and TV shows.
 - The “attentive passionates” (22% of Internet users or 33% of consumers of dematerialized cultural goods): younger than the average population, with a very strong consumption of creative and joyful cultural goods, they are ready to pay to have access to products that meet more closely their needs.
 - “digitalvores”: (16% of Internet users or 24% of consumers of dematerialized cultural goods): younger and more tech-savvy than the average population, they are keen on dematerialized cultural products that they can consume, having been used so, illegally.
 - The “legal cultural” (7% of Internet users or 10 % of consumers): older than the average population and less frequently connected online, they are almost exclusively book consumers on the Internet, and have more legal practices than the average population.
 - The “non-consumers” (33% of Internet users): rarely connected online, they haven’t consumed cultural good in the last 12 months. Being non-consumers, they don’t feel concerned by the legal/illegal matter of the consumption of cultural goods.

40. SURVEY OF THE ONLINE MUSIC CONSUMPTION

Title of the study/survey: Etude sur la consommation de musique en ligne (Survey of the online music consumption)

Author/Organisation: Hadopi

Source: http://www.hadopi.fr/sites/default/files/page/pdf/Consommation_musique_en_ligne.pdf

Year of publication: 2011

Main Focus: The behavior and practices of French Internet users, regarding protected cultural goods, especially music.

Methodology, scope, sample: Interviews have been led through an access panel online, from August 24th to September 1st 2011, on a representative sample of the French population over 15 years old (according to the quotas method of the Etude Credoc, June 2009), with an over-representation of people aged 15-17. 1 000 people have participated in this survey. To assess the representativeness of the sample, the quotas were set on the following criteria: sex, age, Professional Socio-Category of the head of the family and place of residence.

Length of the study [approx.]: 34 pages PPT

Objective(s): Measure the importance of online music consumption: identification and quantification of the practices linked to downloading, streaming listening and peer-to-peer sharing etc.

Main findings:

- 68% of respondents declare listening to music online weekly
- 52% of them download music, although online musical streaming represents an important part of Internet users' behaviour (98%)
- 51% of the respondents who recognize downloading music say they go on peer-to-peer exchanges websites.
- Weekly consumption of online-streaming music tends to represent an average of 5h14 (based on the question "Weekly listens to and watches online-streaming music")
- Weekly downloads of songs or music-related videos represents an average of 25 (based on the question "Downloads music on a weekly basis")
- The uses that people have of it are multiple, with a large diversity of practices:
 - A majority of the respondents listening to music online on a weekly basis have a mixed consumption (streaming and downloading).
 - Internet users that recognize downloading music online have named an average of 3.3 types of websites, platforms or applications that they use to do so.
 - The respondents saying they listen to music on streaming have named an average of 3.6 websites, platform or application that they use to do so.

41. SURVEY ON THE PERCEPTION OF COUNTERFEITING AMONGST CITIZENS AND CONSUMERS

Title of the survey: Survey on the perception of counterfeiting amongst citizens and consumers

Author/Organisation: Italy - Ministry Of Economic Development

Source: http://www.uibm.gov.it/images/stories/Notizie/Convegno_23012013/survey_consumers_perception.pdf

Year of publication: 2012

Main Focus: Italian citizens' perception of counterfeiting

Methodology, scope, sample:

5.200 consumers across all the 20 Italian Regions identified according to precise demographical criteria.

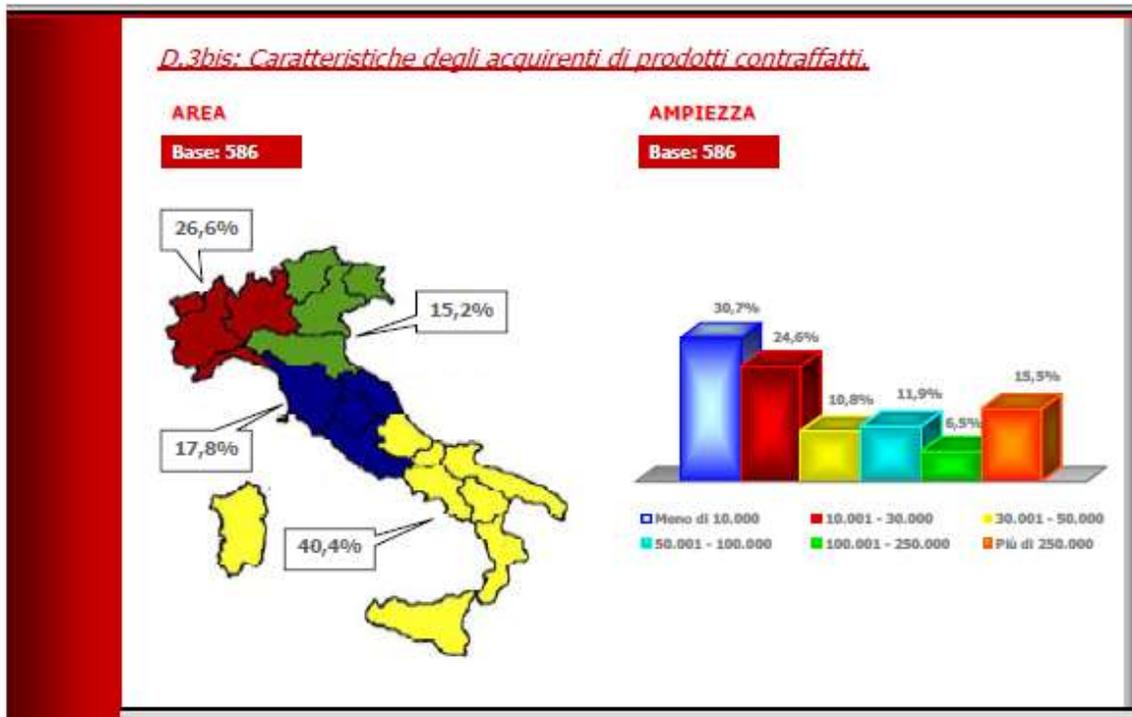
Length of the study: 31 pages PDF

Objective(s):

- Measuring the perception of counterfeiting amongst citizens and consumers and their perception about the risks on health and safety and the economic and social damages
- Obtain information useful to developing a policy for raising awareness amongst the general public:
 1. putting a number to the counterfeit purchase phenomenon;
 2. identifying the methods and channels through which counterfeit goods are purchased;
 3. calculating the average amount spent on this type of purchase annually;
 4. identifying the types of products most commonly purchased;
 5. determining whether individuals are aware of the personal risks run by engaging in this type of purchase;
 6. determining whether individuals are aware of the economic damage caused by this type of purchase;
 7. Identifying the methods and channels consumers deem most appropriate and effective for fighting counterfeiting.

Main findings:

- Just 14.6 % of the individuals surveyed admitted that they had purchased counterfeit goods (586 of 4,000 interviewees):



- 90% of the sample stated that they know buying counterfeit goods is a crime.
- The most purchased counterfeit goods are articles of apparel/accessories, primarily from stalls, street pedlars and ethnic vendors.
- Price is the main reason for buying counterfeit goods (91.4% of those surveyed gave it as their first or second reason).
- In addition, individuals who buy counterfeit goods do not feel there is a significant difference in quality compared to original products. 71.2% of those surveyed stated that they were satisfied with their purchase and would do it again.
- 72.9% responded that they did not feel guilty about the tax aspect, either for having contributed to the interests of organised crime or having harmed the economy. They focus solely on their own interests.
- Over half of respondents spend an amount between several dozen euro and less than 100 euro. Those who spend at least 100 euro account for 35% of the total.
- 61.8% of those who buy counterfeit goods are aware that it funds organized crime (78.8% of those interviewed).
- 71.3% of those who buy counterfeit goods are aware of the potential health risks (95.9% of interviewees. This, incidentally, is one of the main reasons cited by those who do not purchase counterfeit goods).
- 70.9% of those who buy counterfeit goods are aware that they are harming the economy by channeling their money into fake products (76.3% of interviewees).

- **90%** of interviewees were aware that they may face penalties for purchasing counterfeit goods. Yet they are **willing to run the risks (including the health risks)** in order to save.
- Methods for combating counterfeiting: From the list of proposals, the options preferred by the interviewees were as follows:
 - creating original/brand name product lines and selling them at lower prices (91.5%);
 - cutting the prices of original products (87.3%);
 - getting manufacturers of original products to provide authenticity certificates which enable items to be traced from the moment the raw materials are purchased to their manufacture and sale (82.4%);
 - penalising sellers of counterfeit goods (79.6%). However, **50%** of interviewees did **not agree that the buyer should be penalised**.

Interesting questions to use in quantitative questionnaire:

→Q: *Do you know buying counterfeit goods is funding organized crime?*

→Q: *What is your reason for purchasing counterfeit goods?*

Probe: The affordable price; the need for that product / article; for fun; I did not know it was counterfeit etc.

→Q: *After purchasing counterfeit goods, do you feel guilty about the tax aspect, for having contributed to the interests of organized crime or having harmed the economy?*

→Q: *What do you think are the effective methods of combating counterfeiting?*

Probe: creating original/brand name product lines and selling them at lower prices; cutting the prices of original products; getting manufacturers of original products to provide authenticity certificates which enable items to be traced from the moment the raw materials are purchased to their manufacture and sale; penalising sellers of counterfeit goods.

42. 2011 GLOBAL SOFTWARE PIRACY STUDY - ROMANIA

Title of the study/survey: 2011 Global Software Piracy Study - Romania

Author/Organisation: IPSOS for BSA

Source: See PPT

Year of publication: 2012

Main Focus: Romanian computer users

Methodology, scope, sample:

- Online survey of 410 computer users in Romania, conducted from February to March 2012
- Online and in-person surveys of 14,702 PC users globally conducted February-March 2012

Length of the study: 2 pages short PDF

Objective(s): Understand the attitude of consumers and business decision makers towards software piracy in Romania

Main findings:

- PC users in Romania who say the “risk of getting caught” is a good reason not to acquire unlicensed software: 30%.
- PC users in Romania who say “pirating software is illegal” is a good reason not to acquire unlicensed software: 6%.
- In many regions, business decision makers (BDMs) are more likely to admit acquiring unlicensed software than other users.
- Globally, BDMs who admit they pirate software most frequently are more than twice as likely to acquire software for one computer and install it on multiple PCs in their office than other users.

43. CONSUMERS AND COUNTERFEITING

Title of the study/survey: Consumers and counterfeiting

Author/Organisation: Sintra Cosmoline for ANDEMA – Spanish National Association for the Defense of the Trademark (Asociacion Nacional para la defensa de la Marca)

Source: See PPT

Year of publication: 2010

Main Focus: Consumer survey on the frequency, spending and drivers for buying counterfeits

Methodology, scope, sample: Quantitative survey of 1,000 Spanish adults between 18 and 84 years old in Madrid, Cataluña, Valencia, Andalucía and Canarias.

Length of the study: Large, approx. 150 slides

Objective(s): Provide information on the levels of voluntary and involuntary purchase of counterfeits

Main findings:

- The highest levels of counterfeits purchased concern clothes and leather goods
- Counterfeit jewelry and watches have tripled since 2006
- Counterfeit perfume come in 4th position
- The principle motive for buying counterfeit goods is the price

44. FILE SHARING 2©12 DOWNLOADING FROM ILLEGAL SOURCES IN THE NETHERLANDS

Title of the study/survey: File sharing 2©12 Downloading from illegal sources in the Netherlands

Author/Organisation: IViR (Institute for Information Law) and CentERdata

Source: http://www.ivir.nl/publications/poort/Filessharing_2012.pdf

Year of publication: 2012

Main Focus: Downloading behavior in Netherlands

Methodology, scope, sample:

Make a distinction between four channels: buying material on physical formats in an offline or online store, paid-for downloading or streaming from a legal source, free downloading or streaming from a legal source and downloading or streaming from an illegal source.

In May and June 2012, 3,118 members of the CentERpanel, an online household panel that is representative of the Dutch population, were invited to take part in the survey. The response rate was 64.4%, or 2,009 fully completed questionnaires.

Length of the study [approx.]: 37 pages PDF

Objective(s): Examine the state of play in 2012, describing the various facets of illegal file sharing in the Netherlands, the channels used to obtain content, a profile of downloaders, people's willingness to pay and how users rate these channels

Main findings:

- Downloading and purchasing: state of play

Just over a quarter of the population aged 16 and over has on occasion downloaded from an illegal source in the past year. Music is most downloaded from illegal sources, followed by films and series, with games and books trailing at some distance.

Downloading from an illegal source comes in tied third place as a means to acquiring music, films, series, games or books. Purchasing physical formats in an offline or online store is still most common; that is to say, it is the channel most recently used by most Dutch people. In second place we see free downloading or streaming of content from various legal sources. Paid-for downloading and streaming from legal sources and downloading from illegal sources are about equally popular, although the type of content downloaded does vary considerably.

- Downloaders versus buyers: profile and purchasing behaviour

Purchasing physical formats in a brick-and-mortar or online store is not particularly age-specific.

The various online channels are most popular among young people under age 35 or 45, with people who download from illegal sources being younger on average than users of legal online channels. Men are overrepresented among those who download from illegal sources and from free legal sources. Whereas all legal channels are positively correlated with education, this correlation was not found for downloading from illegal sources. Respondents who had on occasion downloaded music, films and series, games and books from an illegal source in the past year were also more intensive users of legal channels, they bought more merchandise and went to concerts or the cinema more often. In other words, people who download from an illegal source are also legal consumers of music, films, series, games, books and derived products.

- Willingness to pay, assessment of channels and implications for the value chain

Between one third and half the respondents would not be willing to pay for their most recent download from an illegal source. The rest have a maximum willingness to pay in the region of the normal retail price, on average. There was also an interest in and a willingness to pay for borrowing e-books from a library or bookshop. Physical formats were still top-rated by the respondents in terms of their technical quality, the availability of titles and price. The technical quality of illegal content scored least favourably. A majority of respondents felt that the various parties in the value chain stand to lose from downloading from an illegal source.

The study found a marked difference between music and films & series. Whereas downloading of music from an illegal source is declining, downloading of films & series has increased. Downloading of games from an illegal source has remained more or less the same.

45. DIGITAL ENTERTAINMENT SURVEY - KEY PIRACY FINDINGS

Title of the study/survey: Digital Entertainment Survey - Key Piracy Findings

Author/Organisation: Entertainment Media Research for Wiggin LLP

Source: See PPT

Year of publication: 2012

Main Focus: Incidence of accessing unauthorized content, attitudes towards piracy, consumer perceptions of content based websites, legalizing piracy websites

Methodology, scope, sample: The findings are based on a large-scale online survey of 2,500 UK respondents, representative of the national demographic conducted in March 2012.

Length of the study: Medium, 18 slides

Objective(s): Provide data on attitudes towards piracy.

Main findings:

- Amongst all respondents, almost two thirds (65%) say that if someone uses the internet to repeatedly break the law despite warnings to stop then it's right that their internet connection should be stopped.
- Six in ten respondents say that it is important to protect the creative industries from piracy
- More than half of respondents (56%) believe that a content based site is legal if the site is established by a legitimate brand.
- More than one in four (43%) respondents think a site is legal if it has terms and conditions, while 29% think the same if the site appears high in Google search results.
- Almost a quarter (24%) believes a site is legal if it has advertising by big brands.
- Just over one in four pirates would stop downloading infringing content if the website that they use to access infringing content is blocked by their internet service provider (ISP).
- However, 41% of pirates said they would continue to download infringing content from another website and almost a third (32%) would move to another ISP.
- Just over two thirds of pirates say that it is very easy to find unauthorized content through Google.

46. YOUTH ATTITUDES AND BEHAVIOUR TOWARDS AUDIO VISUAL CONTENT

Title of the study/survey: Youth Attitudes and Behaviour towards Audio Visual Content

Author/Organisation: Platypus research on behalf of Industry Trust for IP Awareness

Source: See PPT

Year of publication: 2013

Main Focus: Youth Attitudes and Behaviour towards Audio Visual Content in the UK

Methodology, scope, sample: Online surveys with children aged 13-17 years old

Length of the study: 38 slides PPT

Objective(s): To provide insight for the industry on 13-17 year olds:

- Understanding of legality
- Attitudes towards the film and TV industry
- Engagement with official and unofficial content
- To explore the impact of young people's engagement with the ScreenThing Facebook on attitudes and engagement with official and unofficial content
- To evaluate young people's views on the ScreenThing facebook page

Main findings:

- Vast majority understand (93%) what is meant by unofficial/unauthorised sources of film and TV programmes: Almost all respondents believe they understand the terms unofficial/official (93%); significantly more males are likely to say yes, I do (66%) females are more likely to say Yes, I think so (46%) or not sure (10%).
- Friends at school main source of finding out about unofficial sites
- Confusion exists with respondents thinking official sites are actually unofficial
- Good awareness of the term 'copyright' and majority recognised the importance of copyright protecting people's work and creative ideas

Official consumption:

- The majority of young people generally watched films via normal TV
- Ownership of films is less motivating than it was previously –young people reported that they watching less films on blu-rays and DVDs than this time last year
- Cinema consumption is generally monthly and self-funded. Cost is the main barrier to young people going to the cinema more often

Unofficial consumption:

- Nearly two thirds have in the past or are currently downloading illegal content. One quarter never have

- Triggers to initial illegal behaviour are free, attraction of TV/film, ease and availability whereas knowledge its illegal and quality are all barriers. Younger respondents find legality issues more of a deterrent than their older counterparts
- Some long-term engagement in accessing unofficial films/TV –over half had been doing it for more than a year. However, no “tipping point” age evident
- Overall accessing unofficial content has a negative effect on young people watching official blu-rays and DVDs, and going to the cinema

Interesting questions to use in quantitative questionnaire:

→Q: *Do you understand what is meant by the term unofficial/ unauthorised sources of film and TV?* Yes, I do, Yes, I think so, No, not sure

47. GB COPYRIGHT THEFT IN FILM, TV AND VIDEO

Title of the study/survey: GB Copyright Theft in Film, TV and Video

Author/Organisation: IPSOS

Source: See PPT

Year of publication: 2011

Main Focus: Audiovisual copyright theft in Great Britain

Methodology, scope, sample: 2,606 interviews amongst GB adults aged 15+ years representative of Great Britain population. Anonymous in-street interviews, 14th November – 10th December 2011.

Length of the study: Medium, 18 slides

Objective(s):

- To measure the extent to which the GB Population is involved in audiovisual copyright theft:
 - Physical fakes: Buying counterfeit DVDs; buying home copied DVDs
 - Digital infringement: Downloading/streaming; copied files from unofficial sources; burning unofficial copies
 - Secondary access: Borrowing or viewing an unofficial copy (as opposed to making/buying)
- To estimate the amount of money lost to the industry (at retail) as a result of all types of copyright theft

Main findings:

- Significant shift in infringement from Physical to Digital
- No change in number of people directly acquiring infringing content
- Decrease in secondary piracy with fewer physical copies in circulation
- Fake DVDs consumed by all demographics
- Digital copyright theft skews more towards younger males
- Compared to 2010, % buying any in-street has fallen from 34% to 25% but remains the most widely used method, with share of volume decreasing from 32% to 27%
- Three quarters of film theft is before the official DVD release
- Fake DVDs particularly prevalent before theatrical release
- 1 in 5 claim they would have paid to buy / watch the content officially had it not been available unofficially.

48. GLOBAL SURVEY: COUNTERFEITING AND PIRACY

Title of the study/survey: Global Survey: Counterfeiting and Piracy

Author/Organisation: Commissioned by Underwriters Laboratories Inc and conducted by the Michael Cohen Group, LLC

Source: See word document [Unpublished]

Year of publication: 2012

Main Focus: Consumer awareness, familiarity, perceptions, attitudes, and behaviors related to counterfeiting and piracy

Methodology, scope, sample: Quantitative online survey with 2400 individuals, drawn equally from ten countries on four continents. The survey was conducted from August 14 to 23, 2012. The ten countries were identified using the following evaluative criteria and represent:

- A range of geographic diversity;
- A significant population size;
- A significant economic loss from counterfeiting and piracy (as estimated by 2007 digital software losses).

The ten countries selected were: Brazil, China, France, Germany, India, Mexico, Russia, South Africa, Thailand, and the United States (US).

Survey participants were screened to meet the following recruitment criteria, representing:

- An equal number of males and females;
- An equal distribution in three age ranges (16-24 years, 25-39 years, and 40-69 years);
- A sub-sample of caregivers of young children (1/3 of all respondents 25 years and older);
- A range of lower, middle and higher SES households (SES criteria differed and was specific for each country; See Appendix A).

International online privacy laws and research industry ethics and guidelines prohibit children from participating in online surveys without parental consent. In order to facilitate the timely and successful completion of this survey, information about younger children's awareness and understanding related to counterfeiting and piracy was obtained through parents/caregivers of children under the age of 16. One-third of adult respondents 25 years and older comprised respondents who answered an additional set of questions addressing their child's level of awareness, understanding, and behaviors regarding counterfeit and pirated goods.

In sum, total samples for each country were 240 respondents and the total international sample was 2400 respondents.

Length of the study: 57 pages word document

Objective(s): This report presents the findings of a multinational, online survey conducted with citizens and consumers in ten countries on the topics of counterfeiting and piracy. The research was designed and conducted by the Michael Cohen Group, LLC (MCG). The study was designed to establish a benchmark understanding of the awareness, familiarity, perceptions, attitudes, and behaviors related to counterfeiting and piracy against which future change may be measured.

Main findings:

- Overall Awareness and Participation
 - Awareness with practices extremely high across all countries
 - Awareness levels at 72% or higher with +91% average for all countries surveyed
 - Younger respondents report higher levels of awareness of piracy
 - Consumer participation in consumption extremely high – some approaching 95%

- Participation is highest in countries with lower GNP (China being an exception)
- Consumers participate in full range of product categories

- Child Awareness and Participation
 - Part of the fabric of social life
 - Considerable portion of caregivers participate
 - Children and caregivers consume full range of products
 - Legal status unclear and ill-defined
 - 2:5 caregivers discuss negative effects with children
 - Majority of caregivers look to schools for education
 - Caregivers prefer local authority figures or educators as optimal sources of information for their children
 - Children participate as early as age 10

- Attitudes and Perceptions
 - Access to unaffordable goods provides acceptable rationale
 - Consumption without safety/health risks deemed acceptable
 - Over 50% view as part of their nation's way of life
 - Legal status unclear and ill-defined
 - Contradictory attitudes
 - Majority feel negatively impacts economy
 - Yet, majority state provides jobs
 - Governments have a role
 - Independent institutions and third parties are trusted information sources
 - Criminalization of consumer participation is perceived to be a strong deterrent along with negative personal consequences

- Strategic Implications
 - Counterfeiting and piracy are considered ubiquitous global activities integrated into the daily fabric of life
 - 85% of individuals participate or know others who participate in the consumption of counterfeit and pirated products
 - Participation will likely rise in the future as youngsters increase in participation
 - Although majority report part of their country's way of life – no strong support for counterfeiting and piracy
 - Activities have become common – acceptance not deeply entrenched
 - Window of opportunity is now
 - Before counterfeiting and piracy become more deeply rooted in social environment

Interesting questions to use in quantitative questionnaire:

- **Level of Awareness of/Familiarity with Counterfeiting and Piracy** → Q: *How familiar are you with the existence and sale of imitation products? How familiar are you with this practice [piracy] taking place?*

- **Consumer Participation** → Q: *How often have you or someone you know purchased an imitation product that you knew was not authentic? How often have you or someone you know copied or downloaded music, movies, or computer software for free instead of paying for it?*

- **Overall Consumer Perceptions of Counterfeit and Pirated Goods as a “Way of Life”** → Statement: *The production and sale of imitation goods are part of my country's way of life.* Probe: agree/disagree/don't know
→ Statement: *It is acceptable to purchase or acquire imitation goods if one cannot afford the authentic version.* Probe: agree, disagree, don't know
→ Statement: *I see no harm in buying imitation goods as long as they aren't dangerous.* Probe: agree, disagree, don't know
- **Respondents' understanding of the legality of counterfeit goods** → Q: *In your opinion, are imitation goods legal or illegal?*
- **Respondents' Perceptions of the Equivalence of Product Functionality in the Consumption of Counterfeit and Pirated Products** → Statement: *If games, toys, or movies look and work the same, it doesn't matter if they are copies or originals.* Probe: agree, disagree, don't know
- **Respondents' Perceptions of the Economic Impact of Counterfeiting and Piracy** → Statement: *The production and sale of imitation goods has a negative impact on my country's economy.* Probe: agree, disagree, don't know
- **Respondents' Perceptions of the Impact of Counterfeiting and Piracy on Jobs** → Statement: *The production and sale of imitation goods provides jobs to many people who would otherwise be unemployed.* Probe: agree, disagree, don't know
- **Participants' perceptions of whether the production and sale of imitation goods is detrimental to or helps the economy** → Q: *Some people say that the production and sale of imitation goods is detrimental to the economy, directly affecting job creation and economic growth. Others think that the production and sale of imitation goods helps small business and provides many people with jobs. Which of these views comes closer to your opinion?*
- **Respondents' Perceptions of the Role of Organized Crime in Counterfeiting and Piracy** → Response to statement: *Organized crime is behind the production and sale of imitation goods.* Probe agree, disagree, don't know
- **Government role** → Response to statement: *The government should be doing more to prevent the production and sale of imitation goods.* Probe agree, disagree, don't know
- **Attitudes Regarding More Aggressive Legal Action** → Q: *Do you think the government should develop stricter or less strict laws in order to fight the production and sale of imitation goods?* Probe: less strict laws, don't know, shouldn't do anything, stricter laws
- **Respondents' Perceptions of Deterrents to the Consumption of Counterfeit and Pirated Products** → Q: *Which of the following, if any, may stop you from buying imitation goods in the future?* Probe: safety reasons, health reasons, organised crime, fear of persecution, ethical issues, economy concerns, original company concerns, others, none, don't know
- **Consumer Perceptions of Credible Spokespeople on the Risks of Counterfeiting and Piracy** → Q: *Who would be a credible source of information about the risks and negative effects of the production and sale of imitation goods?* Probe: the press, the government, a consumer like me, a not-for-profit organization, corporations, a celebrity, a professional athlete, a religious organization, others, don't know.

- **Levels of Caregiver Attitudes towards School-Based Education on Counterfeiting and Piracy** → Q: *Would you be in favour or against making mandatory that children learn about the negative effects of the production and sale of imitation goods at school?*
- **Caregivers' Perceptions of their Child's Exposure to Communications on the Consequences of Counterfeiting/Piracy** → Q: *To the best of your knowledge, has your child ever been exposed to any communications about the possible negative effects or consequences of the production and sale of imitation goods?* Probe: yes, no, don't know.
- **Parents' Perceptions of Credible Sources of Information for their Children on Counterfeiting and Piracy** → Q: *Children would listen to...* Probe: a teacher; a parent or family member, a favourite cartoon character; someone like himself/herself; a police officer; a celebrity; a professional athlete; the government; other; don't know.

49. DANISH GOVERNMENT'S REPORT ON COUNTERFEITING AND PIRACY

Title of the study/survey: Report on Counterfeiting and Piracy

Author/Organisation: Danish Ministry of Economic and Business Affairs

Source: <http://www.stoppiraterne.dk/media/80429/rapportpiratkopiering.pdf> (Full report in Danish)
<http://www.stoppiraterne.dk/media/80473/sg.pdf> (Executive summary in English)

Year of publication: 2008

Main Focus: Consumer survey in relation to counterfeiting and piracy in Denmark

Methodology, scope, sample: Survey commissioned by the Danish Ministry of Economic and Business Affairs. Carried out in July 2007 and which led to the Danish government's large report on counterfeiting and piracy issued in March 2008.

Length of the study: Large, 156 pages

Objective(s): The survey served to inform the Danish government's report on counterfeiting and piracy issued in March 2008.

Main findings:

- Counterfeiting and piracy have damaging effects on consumers, companies and society as a whole. Counterfeit products, such as medicines or children's toys often constitutes an actual health and security risk for consumers, who are not necessarily aware of the fact that they are buying and handling counterfeit products.
- The extent of counterfeiting and piracy is quite significant, and rapidly expanding. The statistics of seized goods by the Danish customs authorities indicate a rise in the amount of goods being copied.
- The majority of counterfeited goods purchased by Danish consumers have been purchased abroad.
- 44% of Danish consumers dissociate themselves from purchasing illegal copies, while 48% said that they may purchase counterfeit products in the future

Note: The full report with questions, graphs and detailed results is only available in Danish and thus couldn't be featured here. The information above is based on the English executive summary.

ANNEX

Links to studies:

1. <http://www.ccapcongress.net/archives/Geneva/Files/Stewart.pdf>
2. <http://www.iccwbo.org/Advocacy-Codes-and-Rules/BASCAP/BASCAP-Research/Consumer-perceptions/>
3. <http://www.ncpc.org/topics/intellectual-property-theft/ncpcs-research>
4. <http://apo.org.au/research/australian-attitudes-and-activities-relation-illegally-accessing-online-movies-and-televi>
5. http://ec.europa.eu/public_opinion/archives/ebs/ebs_363_en.pdf
6. <http://www.consumerfocus.org.uk/files/2009/06/Response-to-independent-review-of-IP-and-Growth-Part-2-fair-use-licensing-solutions-and-appropriate-enforcement.pdf.pdf>
7. http://papers.ssrn.com/sol3/papers.cfm?abstract_id=2128054
8. <http://www.wipo.int/ip-outreach/en/tools/research/details.jsp?id=160>
9. <http://www.ipo.gov.uk/ipsurvey.pdf>
10. <http://www.ipo.gov.uk/ipsurvey2010.pdf>
11. http://www.cric.ac.uk/cric/staff/Jason_Rutter/papers/FakeNation.pdf
12. <http://www.ipo.gov.uk/pro-ipresearch/ipresearch-policy/ipresearch-policy-attitude.htm>
13. http://www.nus.org.uk/PageFiles/12238/2012_NUS_IPO_IPAN_Student_Attitudes_to_Intellecte
[tual_Property.pdf](http://www.nus.org.uk/PageFiles/12238/2012_NUS_IPO_IPAN_Student_Attitudes_to_Intellecte)
14. http://portal.bsa.org/globalpiracy2011/downloads/study_pdf/2011_BSA_Piracy_Study-Standard.pdf
15. <http://www.ipsos.fr/ipsos-public-affairs/sondages/fran%C3%A7ais-face-au-t%C3%A9l%C3%A9chargement-ill%C3%A9gal-musique-sur-internet>
16. <http://www.amsreview.org/articles/eisend12-2006.pdf>
17. https://www.siena.edu/uploadedFiles/Home/Academics/Schools_and_Departments/School_of_Business/College%20Students%20and%20Counterfeiting%20by%20Walthers%20et%20al.pdf
18. http://www.wired.com/images_blogs/business/files/dvdpiracy.pdf
19. Link broken recently
20. http://ec.europa.eu/enterprise/newsroom/cf/_getdocument.cfm?doc_id=4506
21. <http://www.nanosresearch.com/library/polls/POLNAT-S08-T295.pdf>
22. See PDF. Link no longer available

23. <http://www.cgpme.fr/economies/voir/67/resultats-de-la-consultation-cgpme-sur-la-contrefaçon/keywords/les-pme-et-la-lutte-anti-contrefaçon>
24. <http://www.consumerfocus.org.uk/assets/1/files/2010/02/Consumer-Focus-Time-to-change-the-tune1.pdf>
25. http://www.centerforsocialmedia.org/sites/default/files/good_bad_confusing.pdf
26. <http://www.theglobalipcenter.com/sites/default/files/reports/documents/uschambergallupconsumerperceptions.pdf>
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