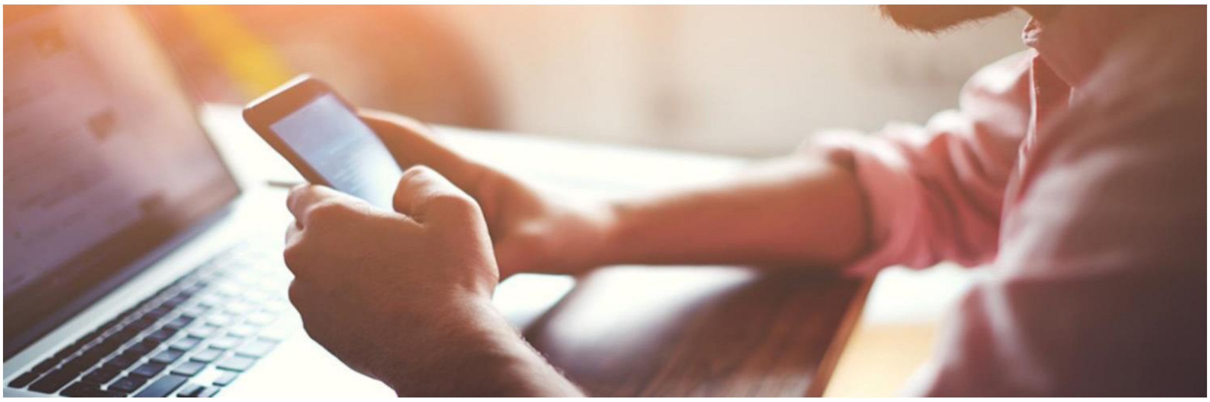
EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE

www.euipo.europa.eu

Intellectual Property and Youth Scoreboard 2022 Executive Summary



June 2022

Foreword

This 3rd edition of the IP Youth Scoreboard provides a welcome update on the behaviours of young people aged 15 to 24 across the European Union regarding IPR infringement. It sheds both a European and a national light on the factors driving young people to purchase counterfeit goods or access digital content from illegal sources. It also stresses the elements that could help our younger generation to curb their infringing behaviours.

The 2022 survey confirms to a large extent the trends identified in the previous editions in 2016 and 2019 but offers richer insights into young people's perceptions and attitudes at a time when online commerce and digital consumption have been increasing significantly, thereby affecting consumer behaviours.

The trend of accessing digital content from legal sources is clearly confirmed, with an increased majority of young people stating their preference for legal alternatives over pirated content.

However, 21 % of respondents still acknowledge having accessed intentionally pirated content in the last 12 months – notably films, TV series, music and live sports events – from dedicated servers, apps and social media. A third of young consumers find it difficult to distinguish legal digital content from pirated content or increasingly do not care.

On the other hand, the intentional purchase of counterfeit goods has increased, with 37 % of young people confirming that they bought at least one fake product in the last 12 months (up from 14 % in 2019).

This trend is worrying, even if methodological improvements may have provided a more accurate picture than previous editions of the Scoreboard.

A similar proportion of young people purchased fakes by accident, and they acknowledge difficulties in distinguishing genuine goods from counterfeits.

Although the survey's respondents still see price as a main driver towards piracy or counterfeiting, the importance of social influences, such as the behaviours of family, friends and people around them, is notably gaining ground.

The personal risk of cyberthreat or cyberfraud are now more widely identified by the young people surveyed as factors that might make them think twice and stop their IPR infringement, as is a better understanding of its negative impact on the environment and society.

This new analysis will provide a valuable, actionable tool to help stakeholders, policy makers, educators and civil society organisations create awareness-raising initiatives to support our young citizens and consumers in making informed choices.

Christian Archambeau
Executive Director
EUIPO

Executive summary

Intellectual Property and Youth Scoreboard 2022

Summary of key findings

This 2022 study follows on from the 1st and 2nd editions of the Intellectual Property and Youth Scoreboard, published in 2016 and 2019. The aim of the original research was to understand which drivers and barriers are strongest when acquiring online digital content or purchasing physical goods offered both legally and illegally. The 2022 study was based on a shortened revised version of the survey questionnaire from 2019. It aimed both to assess changes in attitudes and behaviours since the 2019 study and to obtain new and enhanced insights that could directly inform appropriate policy responses. The study was conducted from 7 to 28 February 2022 among 22 021 young people (aged 15 to 24) in the 27 EU Member States. This report provides a detailed overview of the findings, including, where methodologically possible, comparisons with the results obtained in 2016 and 2019.

Accessing content from illegal sources and purchasing counterfeit physical goods online continue to be common practices among young people.

A third (33 %) of respondents had used, played, downloaded or streamed content from illegal sources over the last 12 months: 21 % had done so intentionally and 12 % unintentionally. While these results are very much in line with those in 2019, there has also been an increase of 10 percentage points in the proportion of young people saying they have **not** accessed content from illegal sources (from 50 % to 60 %). This increase is consistent with findings from the wider recent literature.

Regarding counterfeiting, just over half (52 %) of the young people surveyed had bought at least one fake product online over the last 12 months. A total of 37 % had bought a fake product intentionally, and an equal proportion had done so unintentionally (respondents may have both intentionally and unintentionally purchased a specific type of counterfeit product at some point over the last 12 months). While the results of this question are not directly comparable to the previous editions of the survey, they mark a notable increase in the purchase of counterfeit goods since 2019, when only 14 % of respondents reported having bought such goods intentionally and 12 % reported having done so unintentionally. This change is likely to reflect both the widely documented increase in online shopping during the COVID-19 pandemic and the refinements to the question for the 2022 Scoreboard (detailed in Section 1.3 below). The specific types of counterfeit products that respondents had most commonly bought over the last 12 months were clothes and accessories (17 %), followed by footwear (14 %).

Cost remains the most important factor motivating the illegal accessing of digital content as well as the purchase of counterfeit goods, but other factors are gaining ground, especially social influences.

In line with the 2019 findings, lower cost and larger choice remained the main reasons respondents gave for having intentionally accessed content from illegal sources. Likewise, product affordability was the main factor motivating the intentional purchase of counterfeit physical goods in 2022, followed by simply not caring whether the product was a fake, a belief that there was no difference between genuine and counterfeit goods, and the ease of finding or ordering counterfeits online (18 %). At the same time, for both the accessing of content from illegal sources and the purchase of counterfeits, there has been an increase (of 5 and 6 percentage points respectively) in the proportion of respondents citing the fact that ‘friends or other people I know do this’. This highlights the increased importance of social influences.

Dedicated websites were the most popular way to access most types of digital content illegally.

A new question added to the survey for 2022 revealed that, for most types of content from illegal sources, dedicated websites were the most popular access channel, especially for films (63 %) and TV series (59 %). For music, apps were the most popular channel through which to access pirated content (39 %), while for photos, social media was the most popular channel (36 %).

The availability of more affordable genuine products or content from legal sources, along with the risk of punishment, remain among the main factors that would make young people forego illegal alternatives. At the same time, new answer options added to the survey for 2022 point towards other factors that might make them change their behaviour.

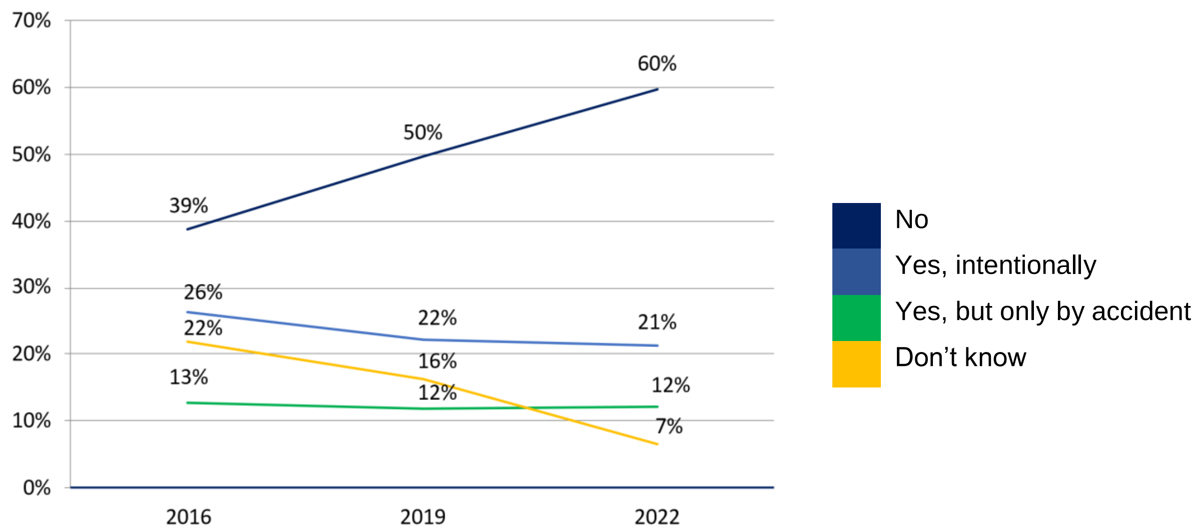
Around half of those who said they had accessed content from illegal sources said they would stop doing so if they were to experience a cyberthreat (41 %) or cyberfraud (40 %), while 24 % said they might do so if they were to experience poor-quality content. Among those who had bought fake products, around a third (31 %) said they would stop if they were to experience a poor-quality counterfeit, and around a quarter said they would do so if they were to experience cyberfraud (23 %) or a cyberthreat (21 %), or if they were to experience an unsafe or dangerous product (22 %). A similar proportion said that a better understanding of negative effects on the environment (19 %) or society (17 %) would stop them.

Digital content

The proportion of young people who have accessed content from illegal sources (either intentionally or unintentionally) has held steady since 2019, at 33 %. At the same time, there has been an increase of 10 percentage points in the proportion saying they have not accessed *any* such content.

In line with the 2019 survey findings, one third (33 %) of respondents had used, played, downloaded or streamed content from illegal sources over the last 12 months, with 21 % having done so intentionally and 12 % unintentionally. While these results are very much in line with those for 2019, there has also been an increase of 10 percentage points in the proportion of young people saying they have **not** accessed content from illegal sources (from 50 % to 60 %). This is consistent with the wider literature, including the 2020 'European citizens and intellectual property: perception, awareness, and behaviour' study, in which the proportion of respondents reporting having paid for legal digital content increased by 17 percentage points compared with 2017 (from 25 % to 42 % in 2020) (Figure 1.1).

Figure 1.1. Accessing digital content – legally or illegally



As in 2019, just over one in five (21 %) respondents had *intentionally* used illegal sources to access digital content.

The intentional use of illegal sources remained above average among males and young people with a high level of education. At the same time, the prevalence of this behaviour varied significantly by country, ranging from 29 % in Belgium to 12 % in Germany. The main types of digital content sought from illegal sources were films (61 %), TV series/shows (52 %) and, to a lesser degree, music (36 %), software (35 %), games (33 %), live sports events (35 %), and e-books (32 %). The proportion of respondents who relied mainly on **legal** sources for any type of content was consistently below 60 %.

For most types of content from illegal sources, dedicated websites were the most popular channel through which to access them.

A new question added to the survey for 2022 revealed that, for most types of content from illegal sources, dedicated websites were the most popular channel through which to access them, especially for films (63 %) and TV series (59 %). For music, apps were the most popular channel by which to access pirated content (39 %), while for photos, social media was the most popular channel (36 %).

In line with the previous edition of this research, the main reason respondents gave for having intentionally accessed content from illegal sources was the lower cost of the content compared with content from legal sources, mentioned by over half of them (55 %). This was followed by the desired content only being available through illegal sources (25 %), and a larger choice being available through such sources. Notably, the 2022 survey results point to an increase in the proportion of respondents saying ‘friends or other people I know do this’ (from 12 % to 17 %), highlighting the increased importance of social influences on behaviour.

The main factor that young people said might make them stop intentionally accessing content from illegal sources was if more affordable content were available from legal sources. The potential for cyberfraud and cyberthreat was the second most frequently mentioned factor that might serve as a deterrent.

The availability of more affordable content from legal sources was the main factor that young people said might make them stop intentionally accessing content from illegal sources: almost half of them (47 %) mentioned this. A similar proportion said they might stop if they were to experience a cyberthreat (41 %) or cyberfraud (40 %), while 29 % said they might do so if they risked punishment, and 24 % said they might do so if they were to experience poor-quality content.

Among respondents who did not know whether they had accessed content from illegal sources, a majority (69 %) continued to say that they could not distinguish between legal and illegal sources, while 26 % said they did not care if a source was legal or illegal. While the former figure was lower than in 2019 (by 15 percentage points), the proportion saying they did not care was higher (by 8 percentage points).

Physical goods

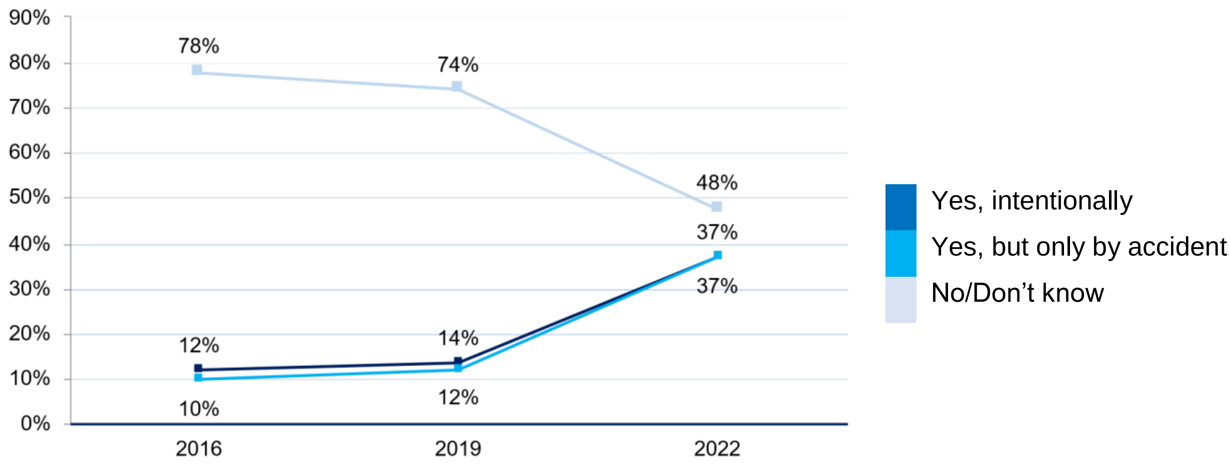
While almost two thirds (63 %) of respondents in the 2022 survey said that they found it fairly easy or very easy to distinguish between legal and illegal sources of physical goods, around a third (31 %) continued to face challenges in this regard. These challenges remained most prevalent among females, teenagers (aged 15 to 17) and those with the lowest level of education.

Just over half (52 %) of respondents had bought at least one fake product online over the last 12 months.

Just over half (52 %) of respondents had bought at least one fake product online over the last 12 months. A total of 37 % had bought a fake product intentionally, and an equal proportion had done so unintentionally, while 48 % percent had bought no such products or were unsure whether they had or not (the figures do not add up to 100 % because respondents may have both intentionally and unintentionally purchased a counterfeit at some point over the last 12 months) (Figure 1.2). While the results of this question are not directly comparable with the previous editions of the survey, they mark a notable increase in the purchase of counterfeit goods since 2019, when 14 % of respondents reported having bought such goods intentionally and 12 % having done so unintentionally. This change is likely to reflect both the widely documented increase in online shopping during the COVID-19 pandemic (and potentially a shortage of products in some physical stores), as well as refinements to the question for the 2022 Scoreboard.

Whereas in previous editions respondents were simply asked whether they had purchased fake goods, in the 2022 edition they were presented with a list of 12 specific product categories and asked whether they had purchased each of these. The inclusion of the list is likely to have prompted improved recall of past purchases on the part of the respondents, thereby also delivering a more accurate measure of their behaviour.

Figure 1.2. Intentional and unintentional purchase of counterfeit goods



The intentional purchase of counterfeits in the last 12 months was highest for clothes and accessories (17 %), followed by footwear (14 %), electronic devices (13 %) and hygiene, cosmetic, personal care and perfume products (12 %). The unintentional purchase of counterfeits was highest for broadly the same product categories.

In line with the results of both the 2016 and 2019 Youth Scoreboards, cost remained the main factor motivating the intentional purchase of counterfeit physical goods in 2022. Just under half (48 %) of respondents who had **intentionally** bought counterfeits in the last 12 months had done so because of the counterfeit's affordability or cheaper price. Other factors cited by at least one in five **intentional** purchasers of counterfeit goods were simply not caring whether the product was a fake (27 %), a belief that there was no difference between genuine and counterfeit goods (24 %), and the ease of finding or ordering fake products online (18 %). Since 2019 there was an increase of 6 percentage points in the proportion citing another reason, namely the influence of people they knew.

Almost a third of respondents who had intentionally bought counterfeits in the last 12 months said they would stop doing so if more affordable original products were available (31 %). An equal proportion said they would stop if they were to experience a poor quality counterfeit (31 %). Around a quarter said they would do so if they were to experience cyberfraud (23%) or a cyberthreat (21 %); if either family/friends (22 %), or others (22 %) had a bad experience with a fake product; or if they were to experience an unsafe or dangerous product (22 %). A similar proportion said that a better understanding of negative effects on the environment (19 %) or society (17 %) would stop them.

Of respondents who were **unsure** whether they had bought counterfeits in the last 12 months, three in five (60 %) said that they were unable to distinguish between genuine and counterfeit products, and 39 % said that they simply did not care whether a product was genuine or counterfeit.

Around a quarter (26 %) of all survey respondents said they did not know whether they had bought a counterfeit product in the last 12 months. Of this group, a majority (60 %) continued to say that they were unable to distinguish between genuine and counterfeit products, while 39 % said that they simply did not care whether a product was genuine or counterfeit. The latter figure was 8 percentage points higher than in 2019, which, again, may indicate the growing social acceptability of purchasing counterfeits.

Communication

Messages about personal safety (for example, in terms of avoiding computer viruses, malware and credit card fraud) continue to be the most compelling for young people when it comes to dissuading them from both accessing content from illegal sources and buying counterfeits. In particular, messages concerning the negative societal or environmental effects of counterfeits also appeared to resonate among some segments of young people.

The messages that would be most likely to make respondents think twice before using, playing, downloading or streaming content from an illegal source included: the risk of their computer or device becoming infected by viruses or malware (53 %), the risk of their credit card details being stolen (49 %), and the risk of punishment (36 %). The messages that would be most likely to dissuade young people from purchasing counterfeit goods were, similarly: the risk of their credit card details being stolen (43 %), the absence of guarantees for counterfeit products (34 %), the risk of computer viruses/malware (34 %), and the possibility of experiencing adverse health effects (31 %). For some segments of respondents who had purchased counterfeits – especially the most educated – messages around negative societal or environmental effects also appeared to resonate to an extent; indeed, they were also among the reasons other respondents gave for **not** having purchased counterfeits.