

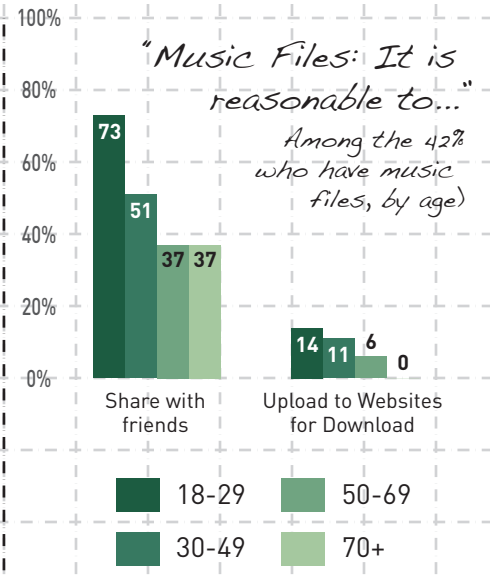
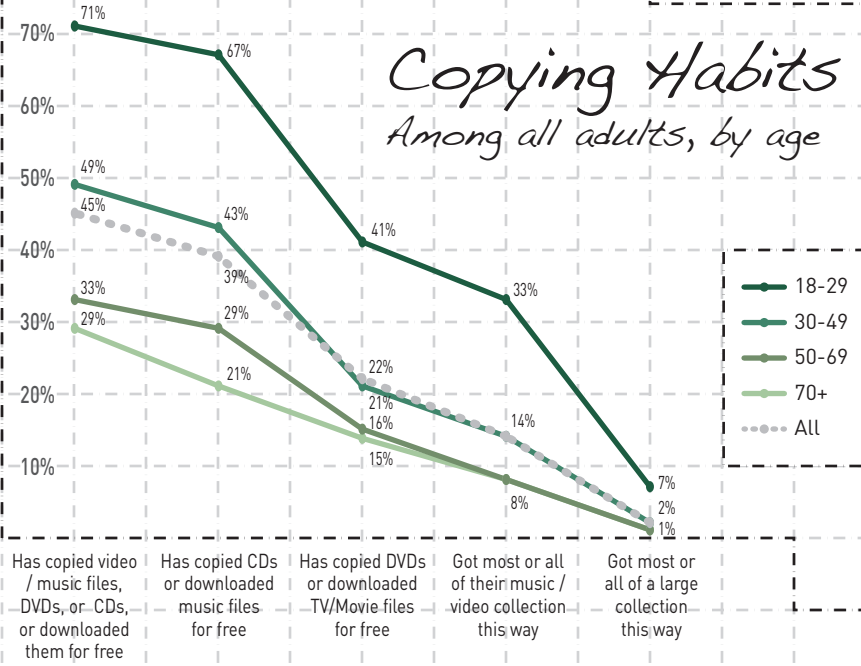
COPY CULTURE

in Germany

- » German 'copy culture' consists of a small hard-core file sharing community (2% of adults) within a large community of casual copiers (45%).
- » Participation in and support for file sharing drops off sharply in the older age groups. Copy culture is youth culture in Germany.
- » On average, offline copying plays a larger role in media acquisition than unauthorized downloading. In Germany, offline sharing is legal.
- » Is enforcement the key to building digital media markets? Not in Germany, which has strong enforcement, relatively low rates of online piracy, and very slow development and adoption of digital media services.

Copying Habits

Among all adults, by age



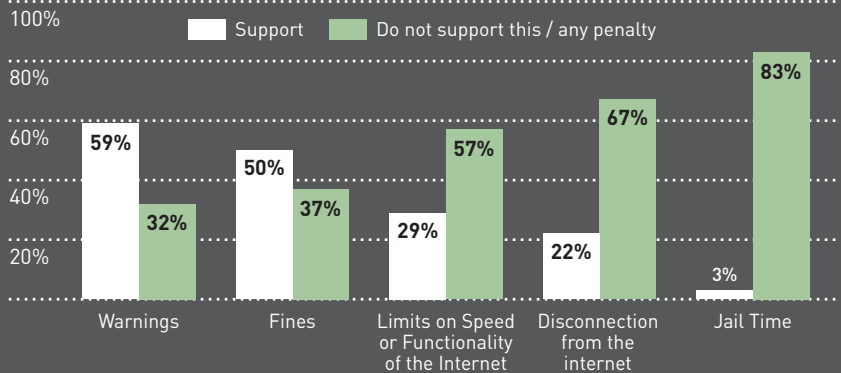
Strong majorities of Germans support copyright enforcement by intermediaries in general. Strong majorities oppose enforcement if it compromises privacy.

Around 60% of Germans support penalties for downloading a song or movie. Majority support is limited to warnings.

Nearly 40% of Internet users make special efforts to encrypt their Internet traffic. 11% use tools to hide their IP addresses.

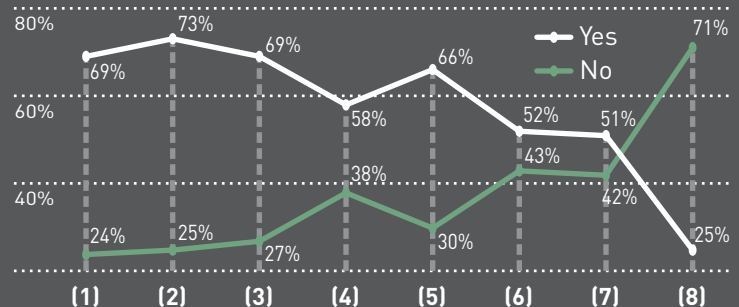
67% believe that due process for charges of infringement requires a court.

What is an appropriate penalty for downloading an unauthorized song or movie?



Blocking Copyright Infringement

- 1 - Should Facebook or Dropbox try to screen activity and remove pirated files?
- 2 - Should ISPs try to screen user activity and remove pirated files?
- 3 - Should search engines be required to block links to pirated music and videos?
- 4 - Should the government block sites that provide access to pirated content?
- 5 - Should ISPs be required to censor sites that provide access to pirated content?
- 6 - Should the government censor sites that provide access to pirated content?
- 7 - Would you support blocking if some legal content were also blocked?
- 8 - Should your internet use be monitored in order to prevent infringement?



The German Copy Culture survey is based on a random phone survey of 1000 German adults in August-September 2011. Funding was provided by Google.