

Digital & Physical Piracy in GB

Wave 5: November 2007



- 1. Approach / Key findings**
- 2. Piracy: The scale of the problem**
- 3. Impact of Piracy: Film and TV Series**
- 4. Counterfeit and Home Copied DVDs**
- 5. Downloading and Burning**
- 6. Borrowing and Viewing**

Background

- This is the fifth wave of a national survey on the scale and impact of piracy and the motivations and behaviour of the people who engage in it.
- The main objectives are to assess the scale and impact of video piracy in the UK, and to get a better understanding of the motivations and behaviour of the people who engage in it.
- The survey explores the three types of piracy:
 - Physical piracy: buying counterfeit or home copied DVDs
 - Digital piracy: electronic distribution (downloading/streaming) from unofficial sources
 - Secondary piracy: Borrowing or viewing an illegal copy – as opposed to making or buying one
- For each type of piracy, we assess:
 - The proportion of people who are engaged in it
 - The average number of pirated units
 - The prices paid per unit
 - The proportion of pirated units that result in genuine lost sales
- This information is used to estimate the overall impact of piracy on the film and TV industry and identify trend.

Methodology



- Fieldwork was conducted in November 2007.
- Sample was consistent with earlier waves: 2000 adults aged 15+ who were interviewed by Ipsos in their own homes as part of its Capibus study.
- The sample is nationally and regionally representative and is matched to the previous waves, ensuring direct comparability in the results (NB the respondents are not the same people as in the previous studies)
- Respondents were initially asked for their experiences of film and TV consumption over the last 12 months.
- Respondents involved in some form of piracy were then questioned in detail about a set list of titles (see appendix) to allow us to understand the extent to which piracy cannibalises the film and TV industry.

Key Findings



- Based on the information collected, it is currently estimated that the impact of Piracy on the industry is:
 - Cinema: **£88m** (£102m in 2006)
 - Retail (Film/TV): **£258m** (£300m in 2006)
 - Rental (Film/TV): **£58m** (£28m in 2006)
 - Download (Film): **£53m** (£15m in 2006)

- The total industry loss (Film & TV series) is estimated to be: **£486m** (£459m in 2006)

- The Criminal Gain from Counterfeit and Home Copied DVDs is currently estimated to be **£200m** (£169m in 2006)

- Year on Year levels of Piracy are relatively stable, although over the longer term there is evidence of a continued, gradual decline in Physical Piracy:

- Digital Piracy levels appear to increase year-on-year

- Overall Piracy levels are now at 32% of the population (vs. 29% in 2006).

- 1. Approach / Key findings**

- 2. Piracy: The scale of the problem**

- 3. Impact of Piracy: Film and TV Series**

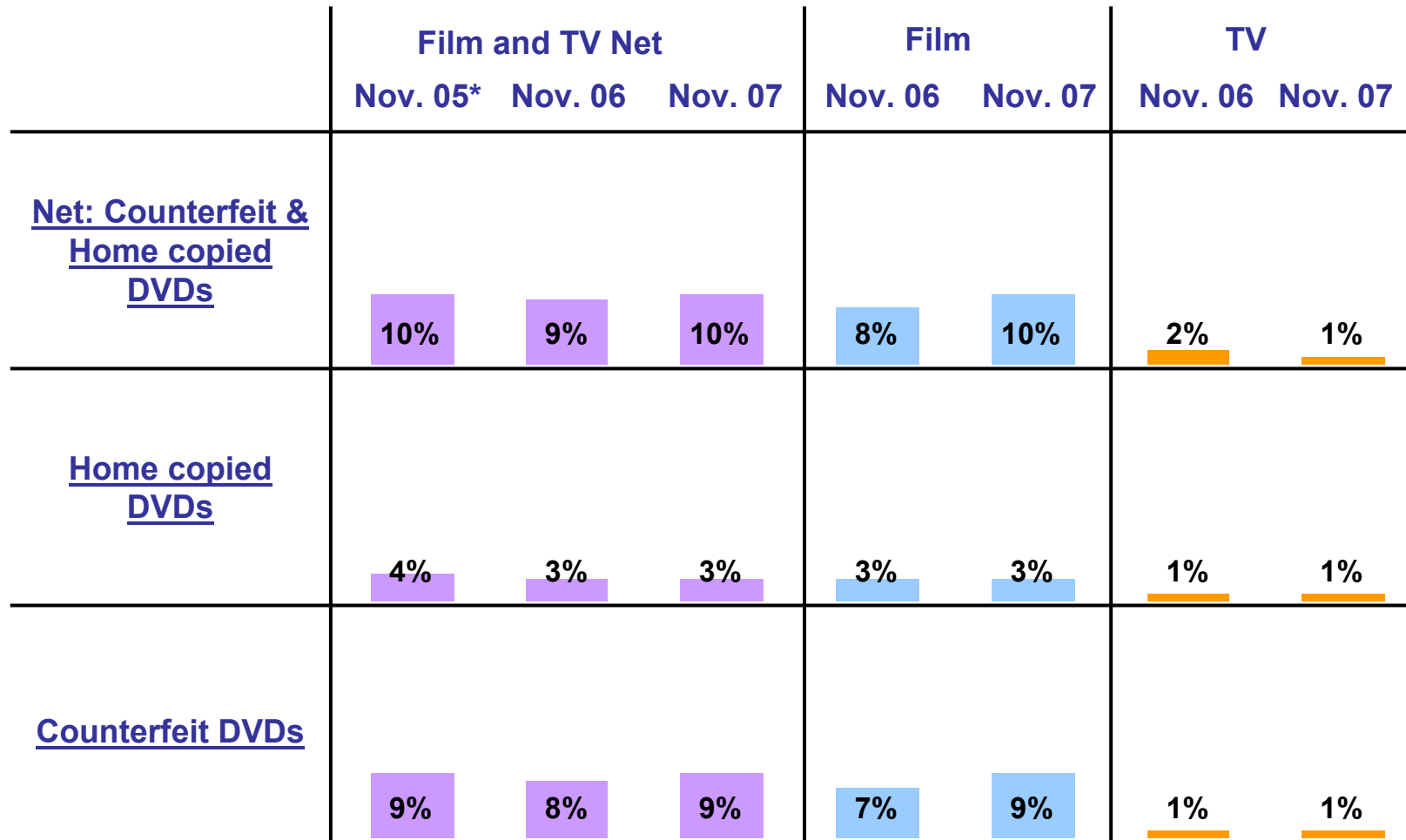
- 4. Counterfeit and Home Copied DVDs**

- 5. Downloading and Burning**

- 6. Borrowing and Viewing**

Physical Piracy: Incidence Over Time

- The percentage who are involved in Physical Piracy (Counterfeit and Home Copied DVDs) is relatively static



* Before Nov 06 question asked about DVDs (general), in Nov 06 question asked about DVDs of films and TV series

Digital Piracy: Incidence Over Time

- Digital Piracy is stable over time, although the number of people downloading both Films and TV series has increased year-on-year.

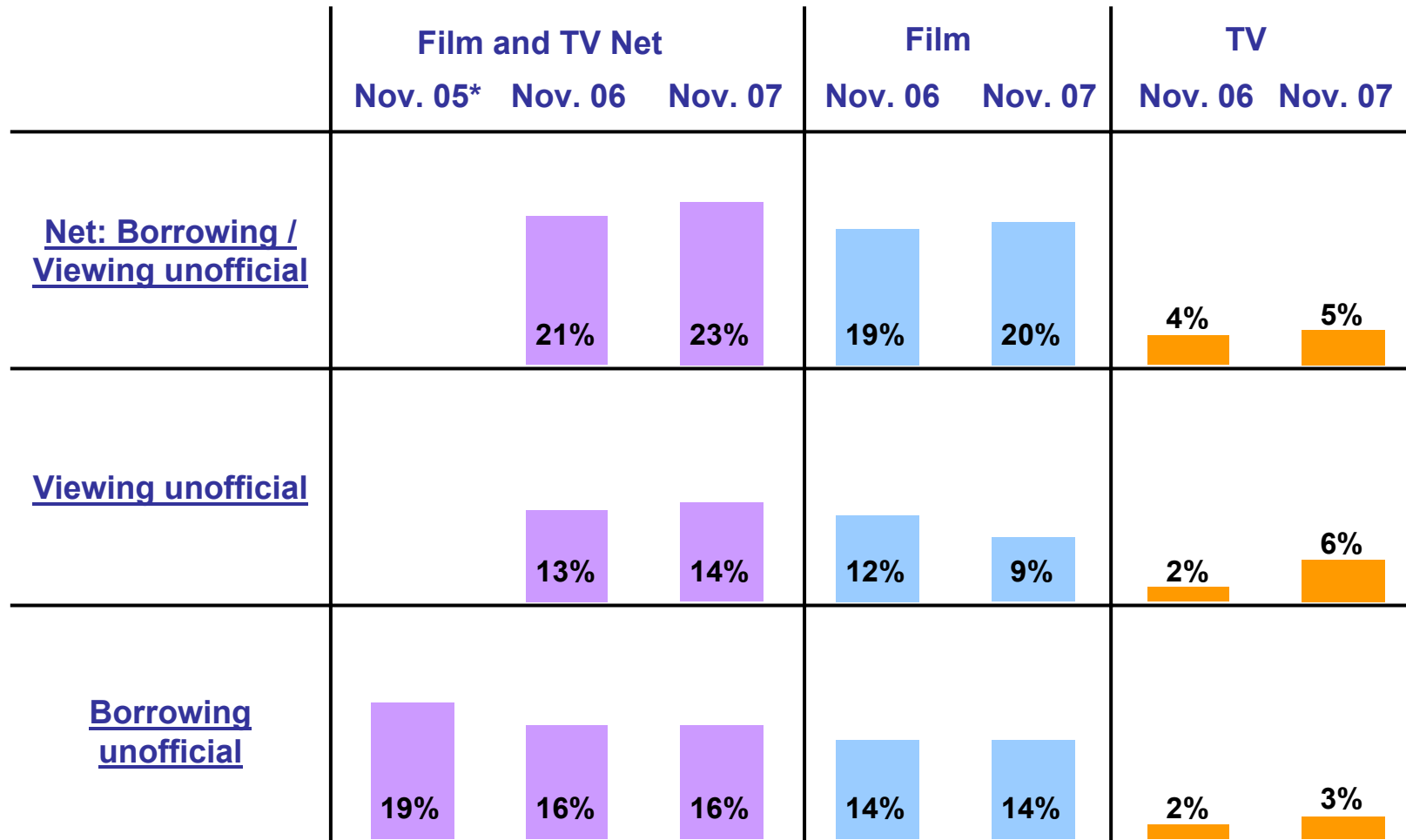
	Film and TV Net			Film		TV	
	Nov. 05*	Nov. 06	Nov. 07	Nov. 06	Nov. 07	Nov. 06	Nov. 07
<u>Copying/Burning (by Self)</u>	3%	3%	3%	3%	3%	1%	1%
<u>Unofficial downloading</u>	6%	6%	7%	5%	5%	3%	4%

* Before Nov 06 question asked about DVDs (general), in Nov 06 question asked about DVDs of films and TV series



Secondary Piracy (Borrowing/Viewing): Incidence Over Time

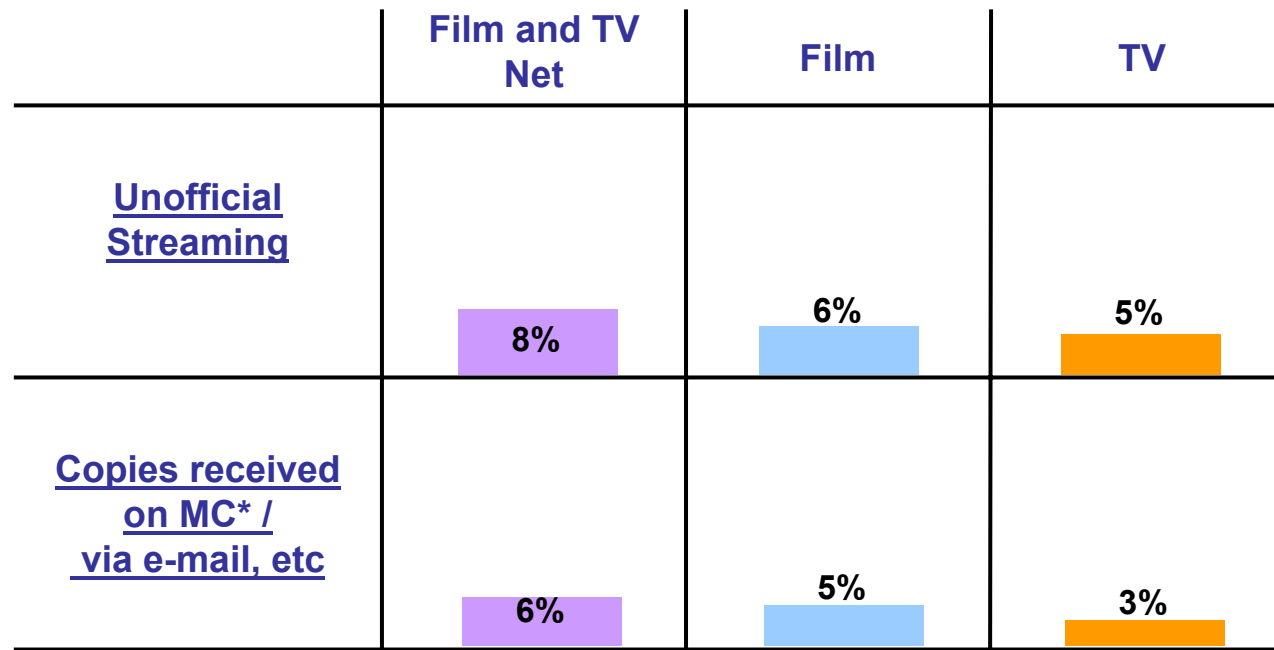
- Secondary Piracy has increased slightly wave on wave.
- Piracy of TV series remains relatively low vs. Films.



* Before Nov 06 question asked about DVDs (general), in Nov 06 question asked about DVDs of films and TV series

New types of Piracy measured in 2007 wave

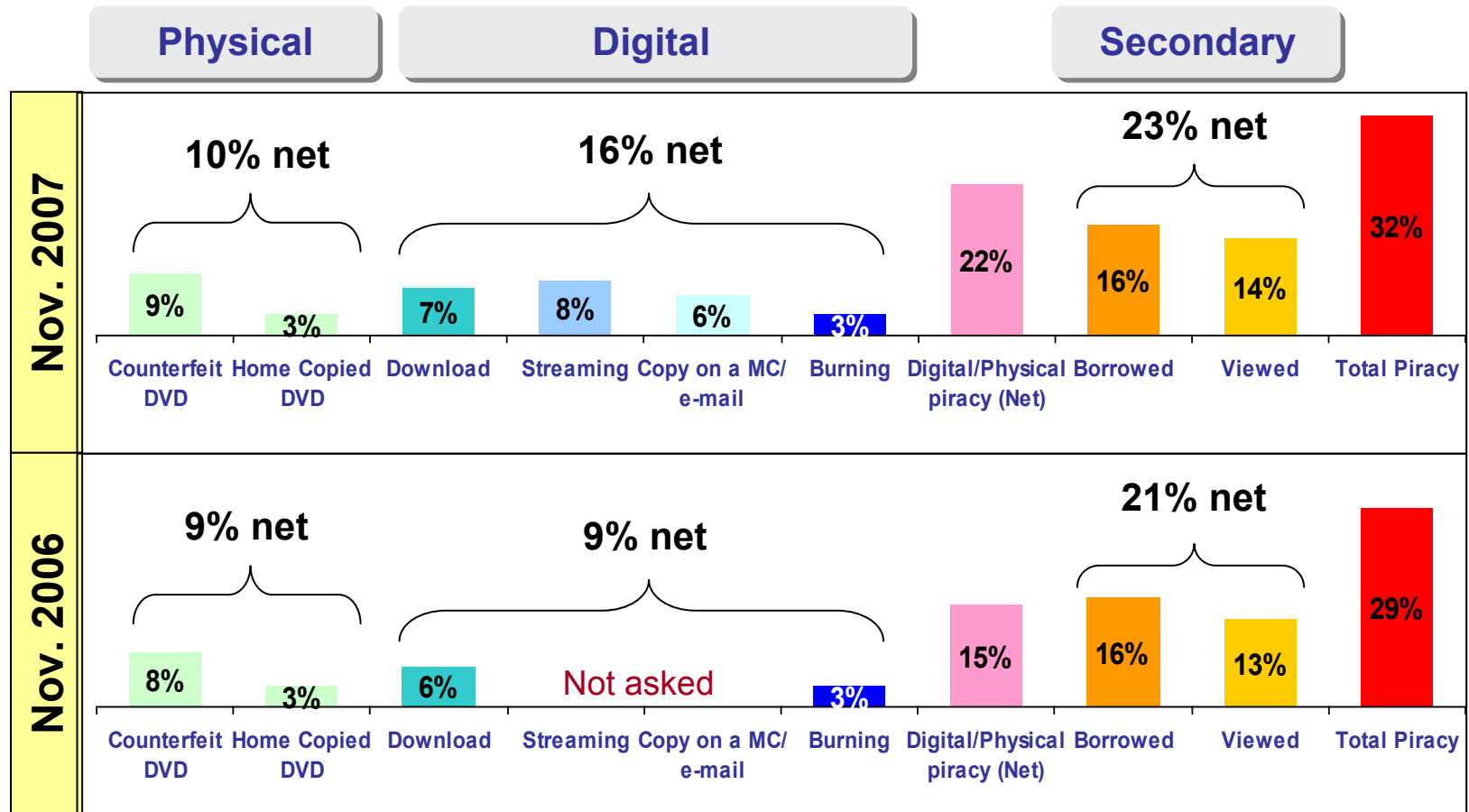
- Unofficial streaming and distribution through memory cards and e-mail appears to be a widespread form of piracy.



* MC = Memory Card

Percentage of Adults participating in the last 12 months

- 32% of the overall population are involved in any form of piracy
- 23% involved in Secondary Piracy (borrowing or viewing illegal copies).



Piracy (Film): Respondents perceptions of how usage has changed Year on Year



• Overall respondents claimed that they were less often involved in acts of piracy this year than last.

Net More/Less:

-20%

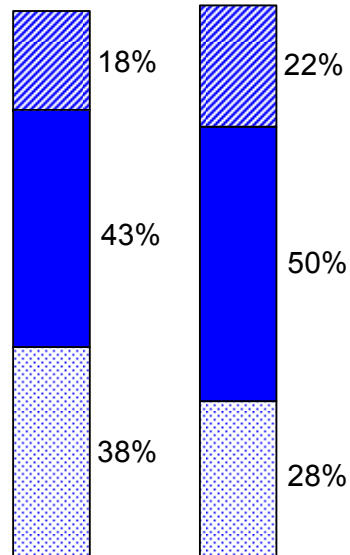
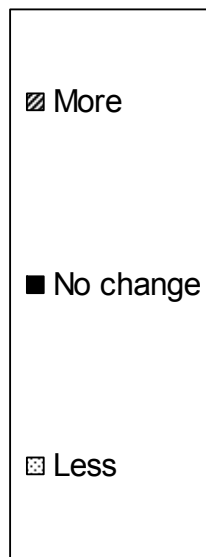
-6%

-13%

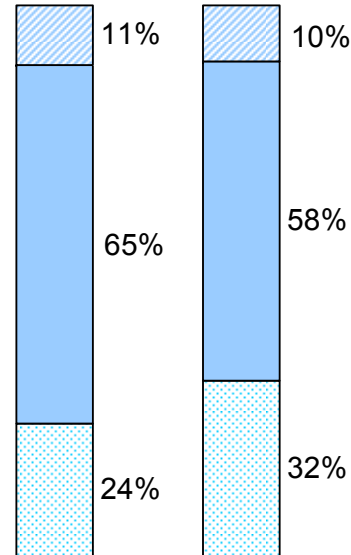
-22%

-22%

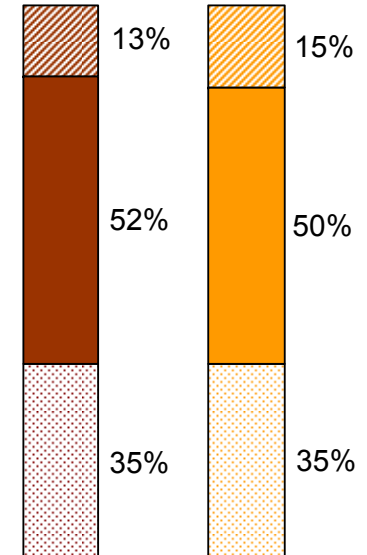
-20%



PHYSICAL PIRACY



DIGITAL PIRACY



SECONDARY PIRACY

Piracy (Film): How Average number of titles pirated has changed Year on Year

- The average number of copies produced through Burning has decreased.
- All other forms of piracy are on the increase.

	2006 (aver.)	2007 (aver.)	Difference (aver.)
Counterfeit	9.3	11.0	+1.7
Bought Home Copied	7.1	8.1	+1.0
Downloading	14.8	14.9	+0.1
Burning	6.3	4.9	-1.4
Borrowed	6.6	8.1	+1.5
Viewed	6.8	12.4	+5.6
On MC/ via e-mail	NA	11.1	NA
Via streaming	NA	15.6	NA

Piracy (Film): How Total number of titles pirated has changed Year on Year



- Year on year the estimated total number of counterfeited copies has increased by over 50%.
- The total number of copies obtained through downloading has gone up by around 20%.

	2006 (aver.)	2007 (aver.)	Difference (aver.)
Counterfeit	32,550,000	49,500,000	+52%
Home Copied	10,650,000	12,150,000	+14%
Downloading	44,100,000	52,150,000	+18%
Borrowed / Viewed	87,000,000	112,500,000	+29%
On MC/ via e-mail	NA	27,750,000	NA
Via streaming	NA	46,800,000	NA
Total	174,300,000	226,300,000 <i>(300,850,000 *)</i>	+30%

* Including 'Received on a MC/ via e-mail' and 'Streaming'

1. Approach / Key findings
2. Piracy: The scale of the problem
3. Impact of Piracy: Film and TV Series
4. Counterfeit and Home Copied DVDs
5. Downloading and Burning
6. Borrowing and Viewing

Impact of Piracy – Film: **Introduction**



- Respondents who had been involved in some form of Piracy were then shown a list of Current (2007) Films and TV series:
 - See Appendix for details
- Respondents were then asked whether they had seen any of the titles in the last 12 months
- Respondents who had seen any of the titles (Film or TV series were then asked about these titles in detail:
 - When they viewed
 - How they would have viewed if not seen unofficial copy
 - How likely they were to have viewed official copy if not seen unofficially:
Commitment to view official
- Information used to allow us to understand extent to which each form of Piracy cannibalised Cinema/DVD sales etc.

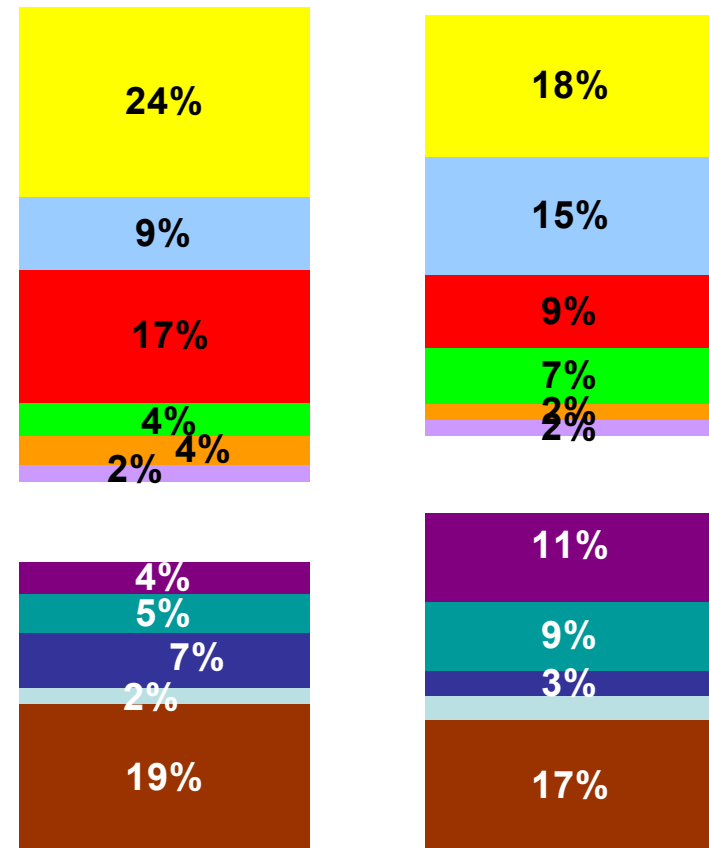
Impact of Piracy – Film:

How would have viewed Film if not seen unofficial version

• Whilst some of those who would not have paid to see a film would have looked to see it on a free source – 17% say they would not have watched the film at all

- In the cinema
- Rented DVD
- Bought official DVD (at release)
- Bought official DVD (later)
- Pay per view TV
- Downloaded from official site

- Terrestrial TV
- Borrowed DVD
- Digital movie channel
- Viewed DVD someone else bought etc.
- Wouldn't have watched (None of these)



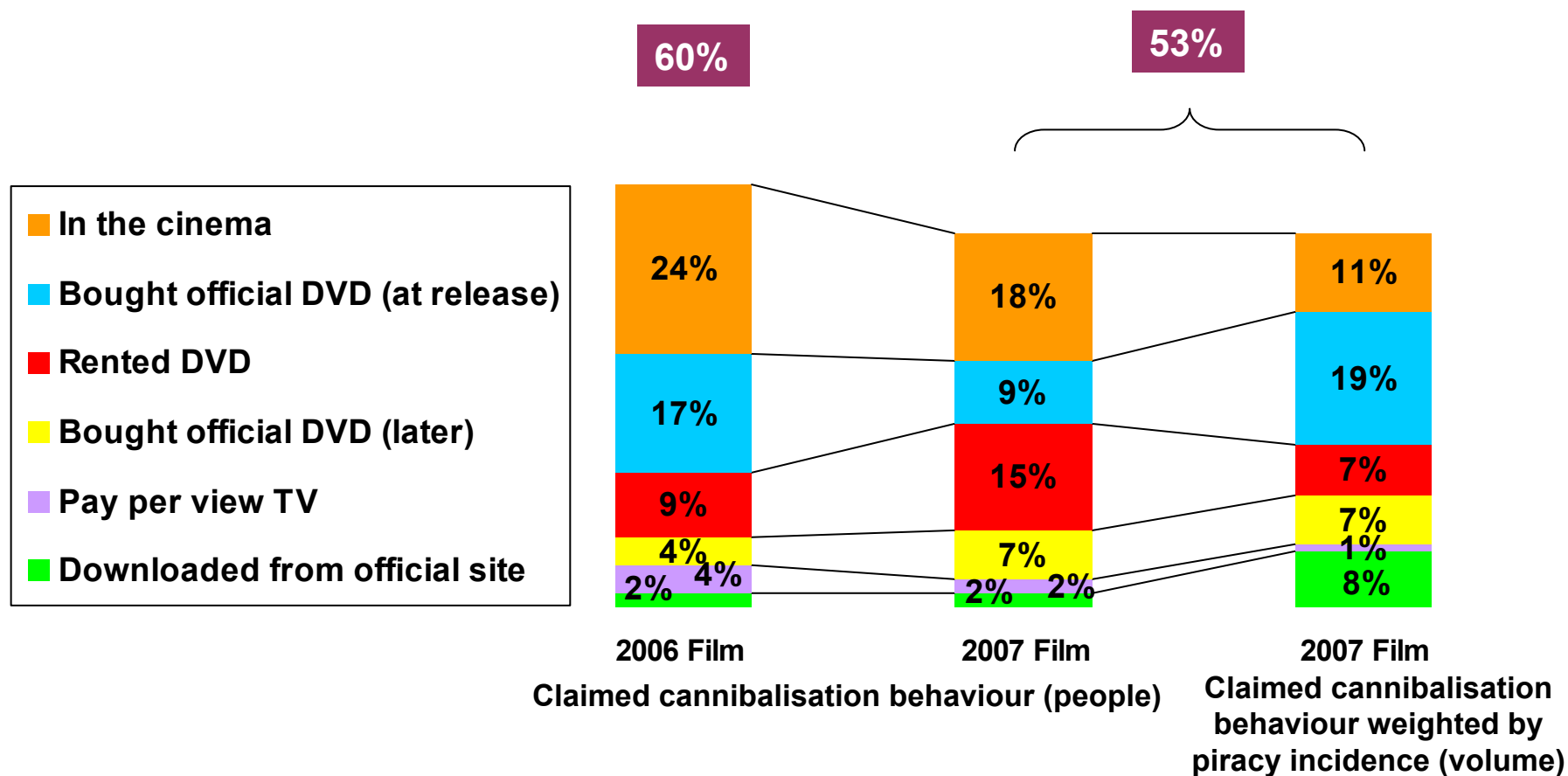
2006 Film **2007 Film**
Claimed cannibalisation behaviour (people)

Impact of Piracy – Film



How would have viewed Film if not seen unofficial version

- The percentage that claimed that they would have seen the movie at the cinema if they had not seen it through unofficial means went down by 6 percentage points.
- The proportion who claimed they would have bought the official DVD at release instead also went down, by 8 percentage points.



Impact of Piracy – TV series:

How would have viewed TV series if not seen unofficial version

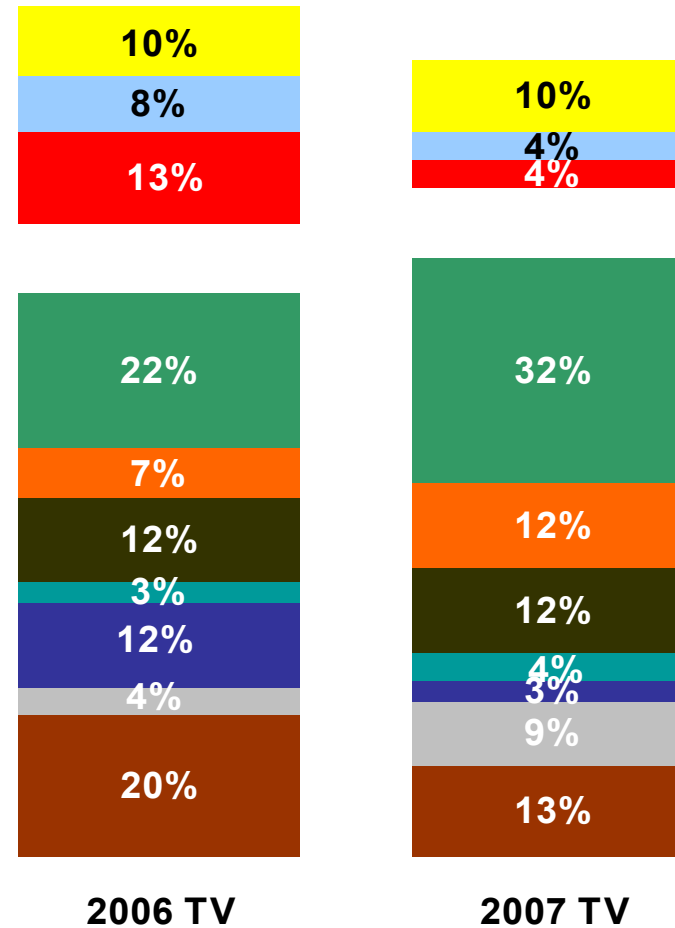
• The most common response is that respondents would have seen a title on TV if they had not received an illegal copy of it.



Low Bases

- Bought official DVD (at release)
- Bought official DVD (later)
- Rented DVD

- Waited until on terrestrial TV
- Waited until on satellite TV
- Borrowed DVD
- Via Live streaming on official sites
- Viewed DVD someone else bought etc.
- Wouldn't have watched (none of these)
- Don't know



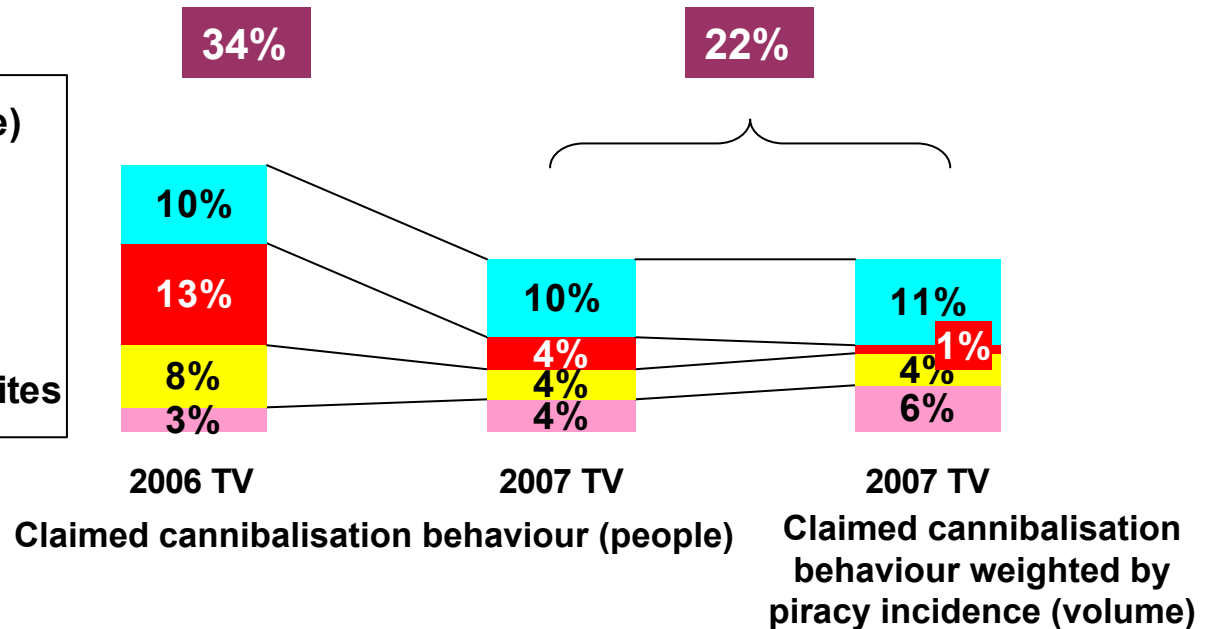
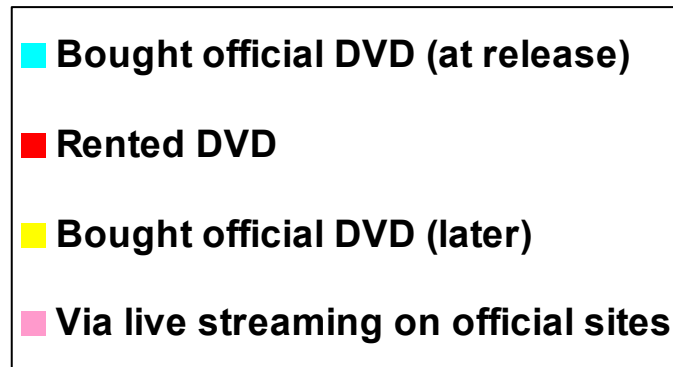
Claimed cannibalisation behaviour (people)

Impact of Piracy – TV

How would have viewed TV if not seen unofficial version

- For TV series around 13% say they would have rented the DVD with 10% buying the DVD at the time of its release.
- Respondents are more prepared to pay to see an official version of a film than a TV series (60% vs. 34%).

Low Bases



Impact of Piracy – Film:

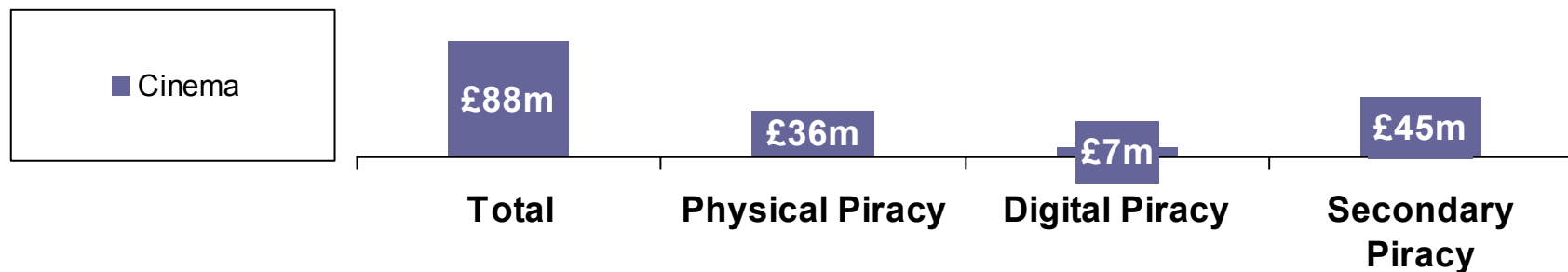
The Financial Impact - Cinema



- Based on the information provided the financial impact of Piracy on Cinema is currently calculated to be £88m – with over half of this lost through Borrowing and Viewing (not bought/downloaded/borrowed personally)

ASSUMPTIONS:

Cinema ticket: £5.07



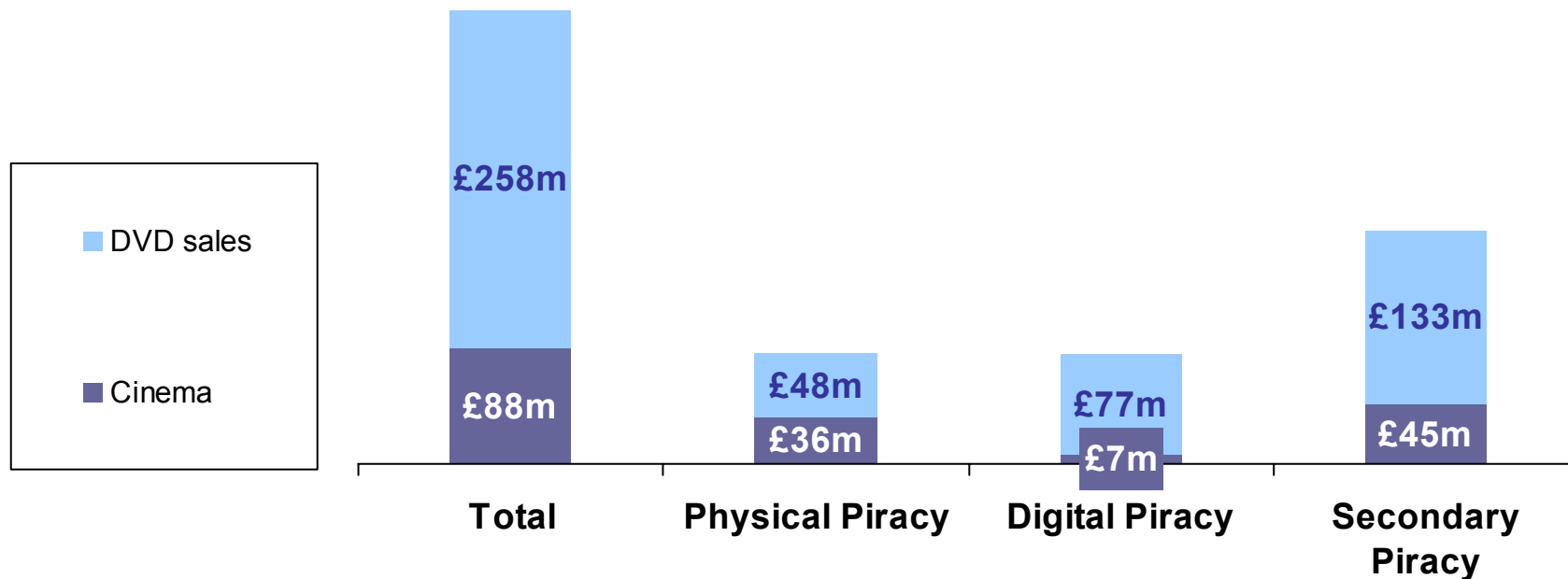
Impact of Piracy – Film/TV series: The Financial Impact – Retail losses

• Retail losses are estimated to be at £258m with half of this accounted for by Secondary Piracy.

ASSUMPTIONS:

Cinema ticket: £5.07
 NR DVD: £12.21 (Film); £21.11 (TV) *
 Catalogue DVD: £6.46 (Film); £17.11 (TV) *

* Source: TNS – based on 52 w/e Nov 11 2007



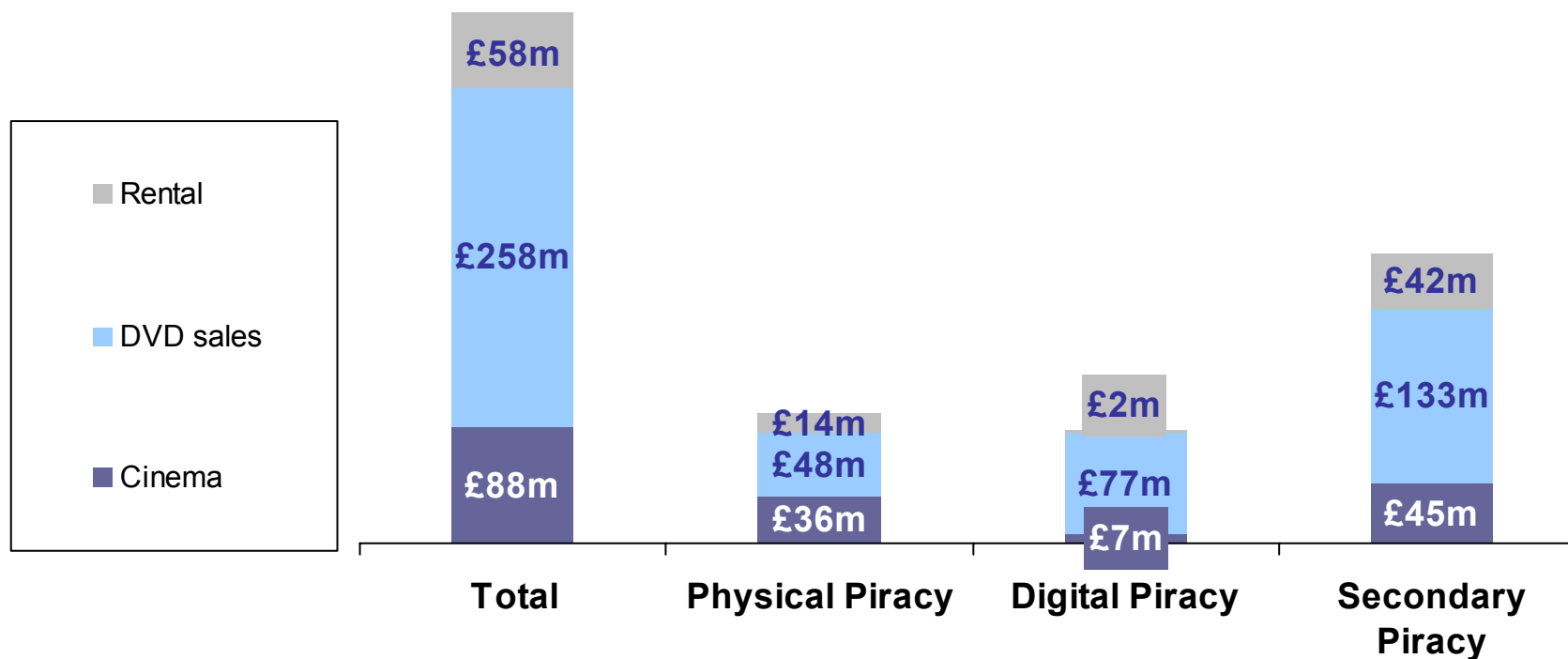
Impact of Piracy – Film/TV series: The Financial Impact - Rental



• Rental losses are estimated to be £58m, with secondary piracy representing over 70% of the total lost sales

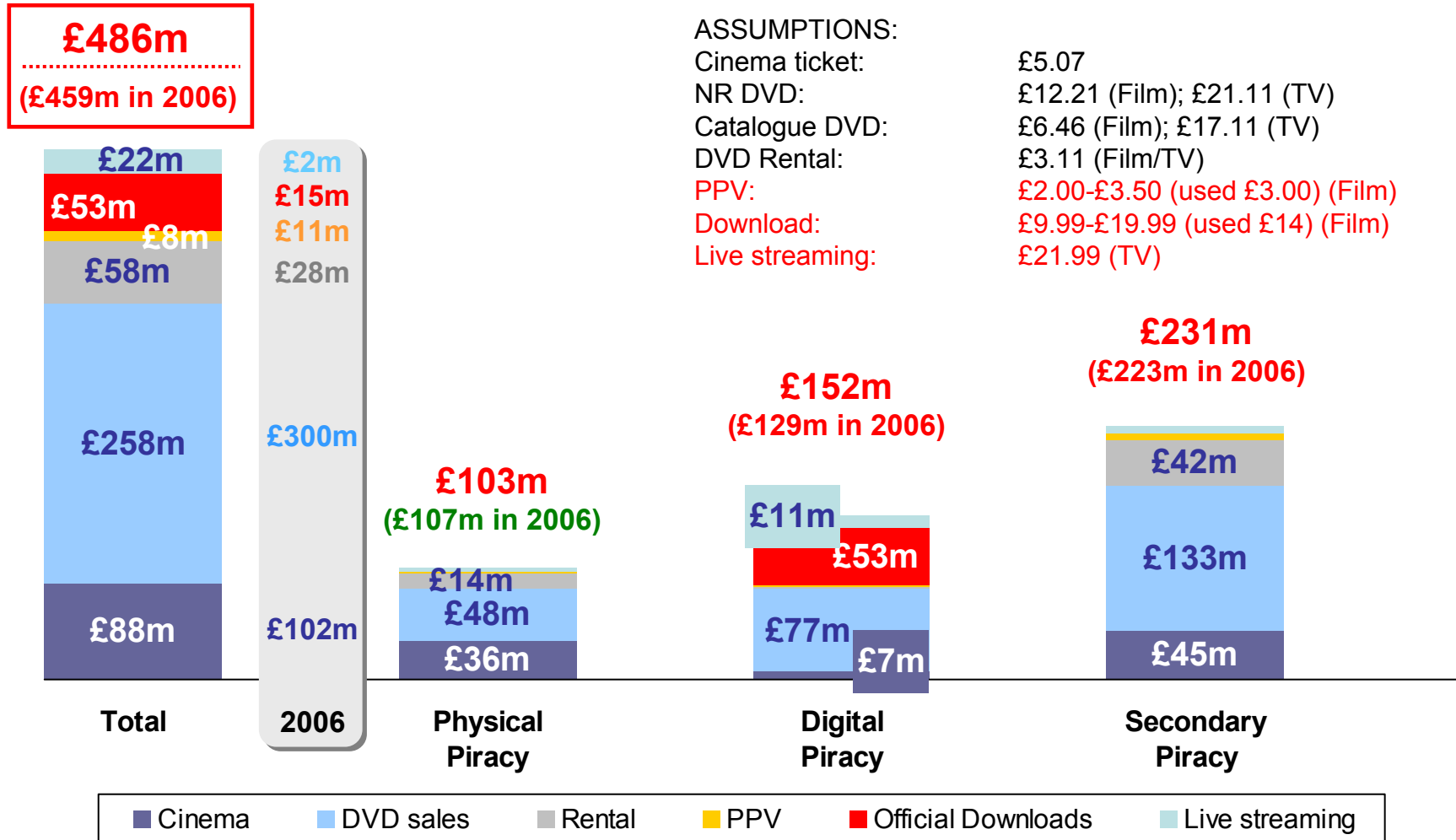
ASSUMPTIONS:

Cinema ticket: £5.07
 NR DVD: £12.21 (Film); £21.11 (TV)
 Catalogue DVD: £6.46 (Film); £17.11 (TV)
DVD Rental: £3.11 (Film/TV)



Impact of Piracy – Film/TV series: The Financial Impact - Total

• Overall loss is currently calculated to be £486m (up from £459m in 2006). The losses because of digital piracy have increased the most year-on-year (up 20%).



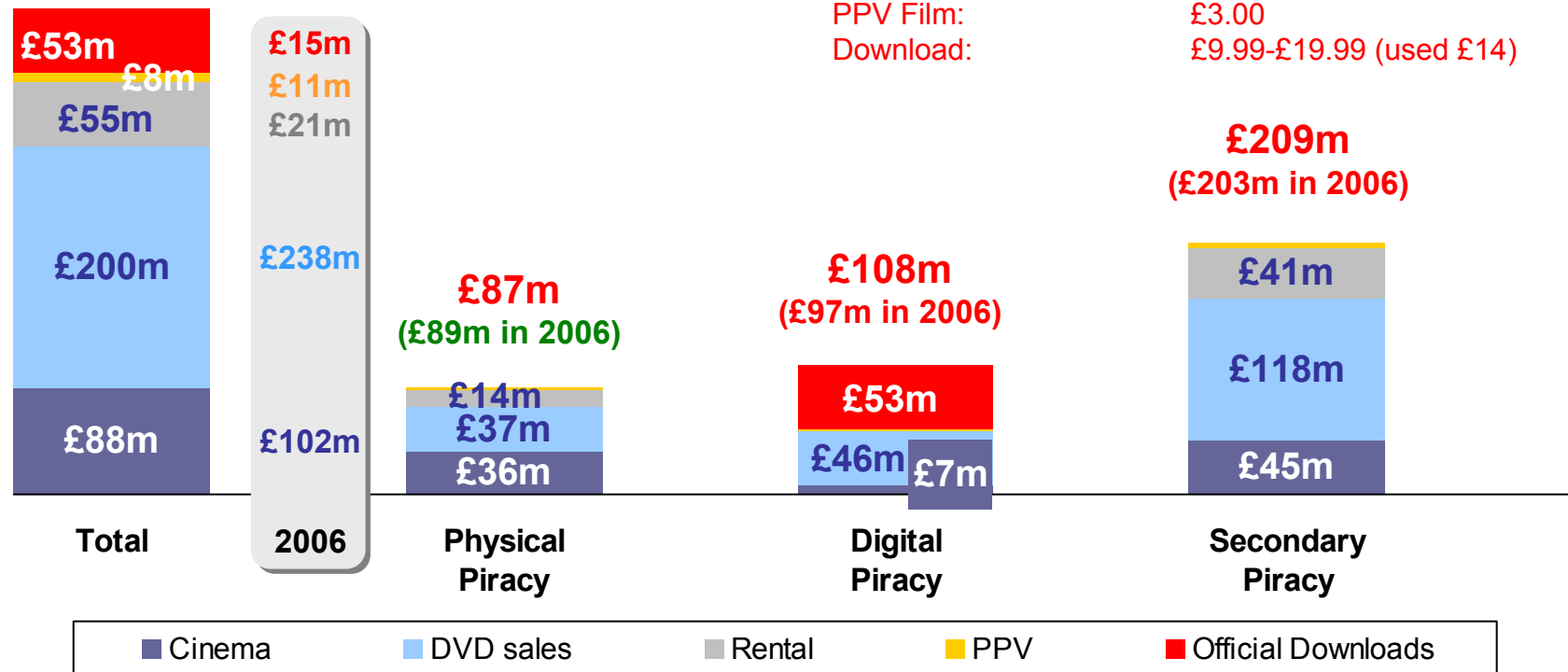
Impact of Piracy – Film: The Financial Impact - Total

• Overall loss for the Film industry is currently calculated to be £404m (compared to £388 reported in 2006), with around a fourth of this driven by Digital Piracy, and a half driven by Secondary Piracy

£404m
.....
(£388m in 2006)

ASSUMPTIONS:

Cinema ticket:	£5.07
NR DVD:	£12.21
Catalogue DVD:	£6.46
DVD Rental:	£3.11
PPV Film:	£3.00
Download:	£9.99-£19.99 (used £14)



Impact of Piracy – TV series: The Financial Impact - Total

• Total loss for TV industry is estimated to be around £82 (up from £77m in 2006) with Digital Piracy accounting for over a half of the loss.

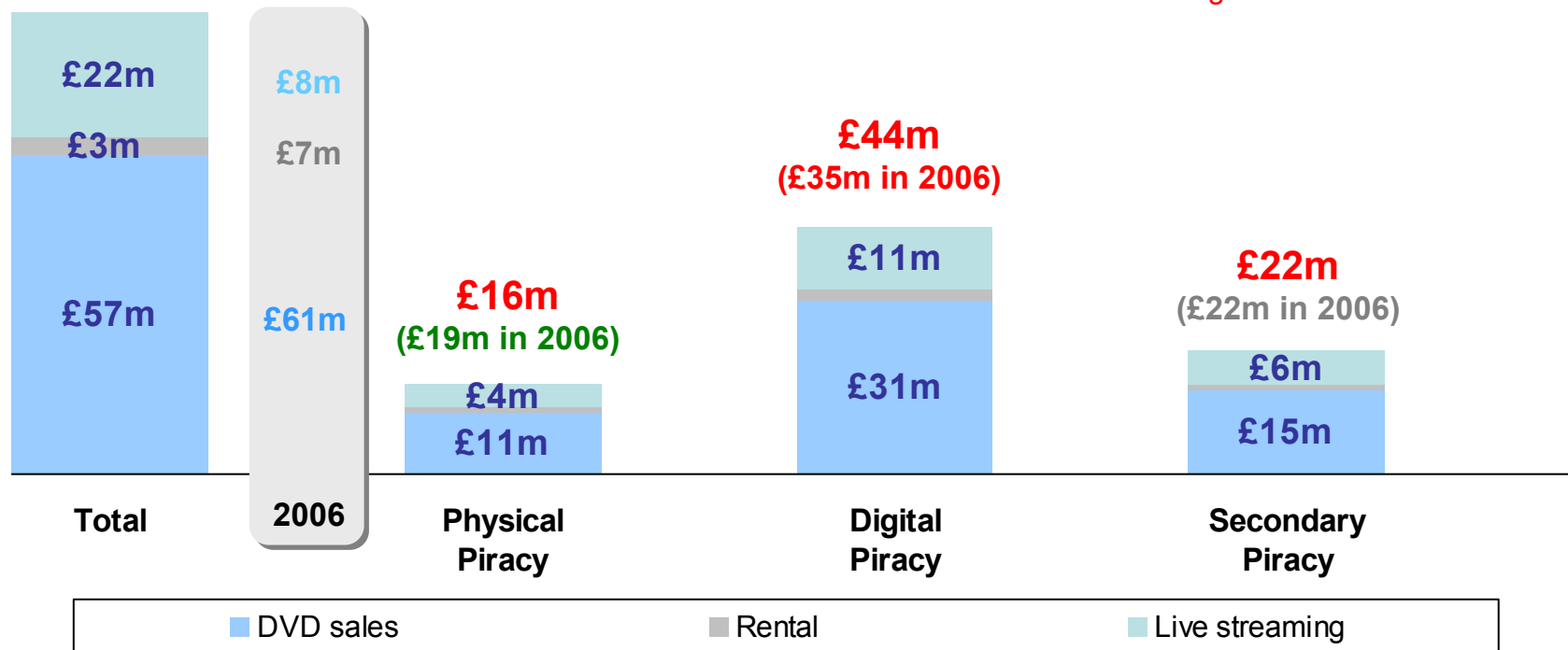
 **Low Bases**

£82m

(£77m in 2006)

TV ASSUMPTIONS:

NR DVD:	£21.11
Catalogue DVD:	£17.11
DVD Rental:	£3.11
Live streaming:	£21.99

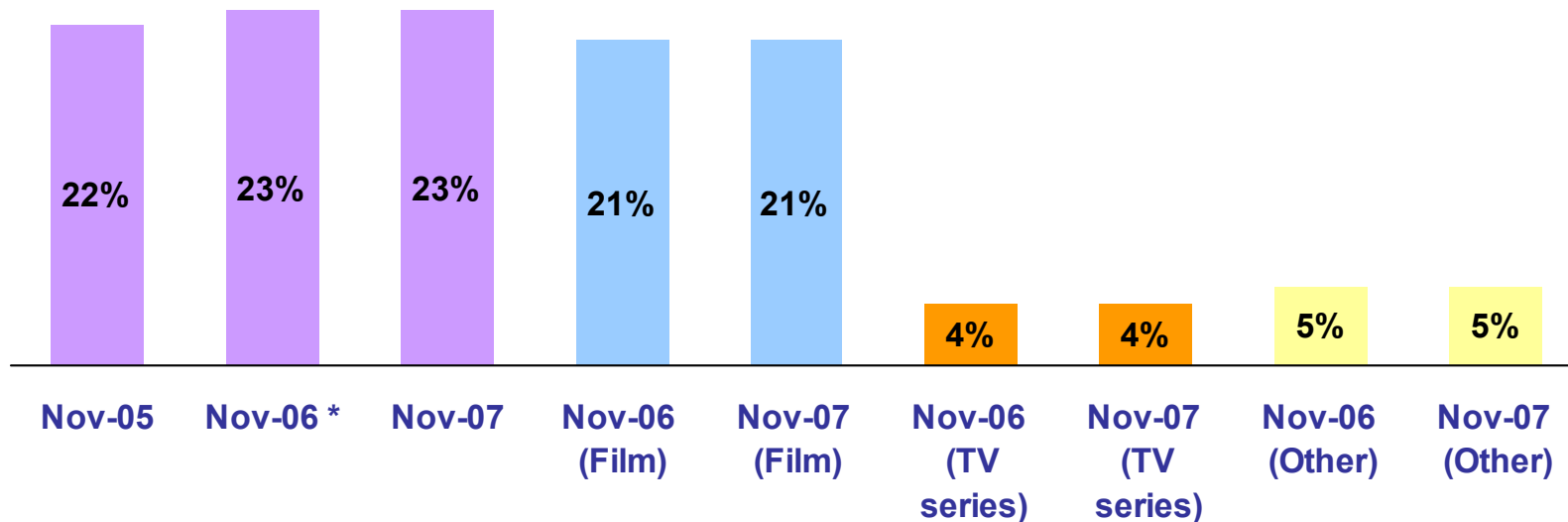


None claimed they would have downloaded

1. Approach / Key findings
2. Piracy: The scale of the problem
3. Impact of Piracy: Film and TV Series
4. Counterfeit and Home Copied DVDs
5. Downloading and Burning
6. Borrowing and Viewing

Percentage who have SEEN Counterfeit DVDs for sale

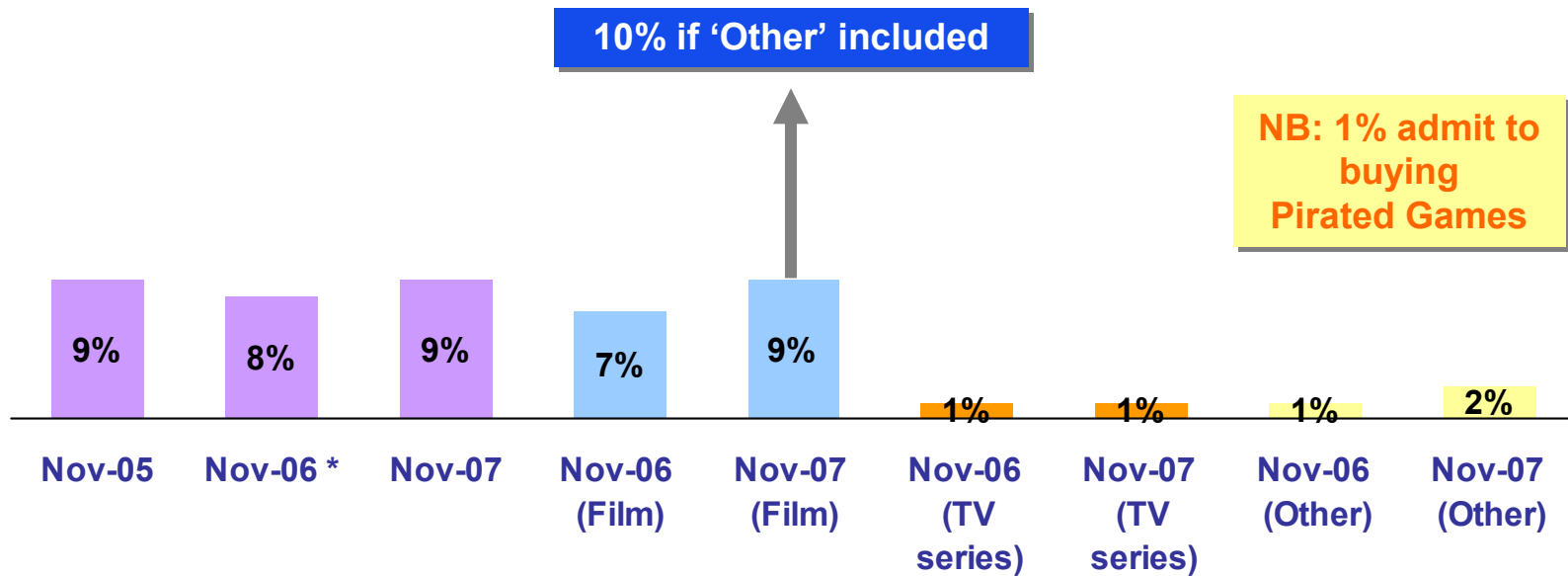
- Exposure to counterfeit DVDs by the respondents remains unchanged year on year with 23% claiming they have seen/ been offered a pirate DVD in the last 12 months.
- Exposure of unofficial TV series DVDs is relatively low with 4% saying they have seen pirate DVDs for sale.



* Before Nov 06 question asked about DVDs (general), from Nov 06 question asked about DVDs of films and TV series

Percentage who have BOUGHT Counterfeit DVDs

- The numbers are stable year on year
- TV piracy is very low compared to films



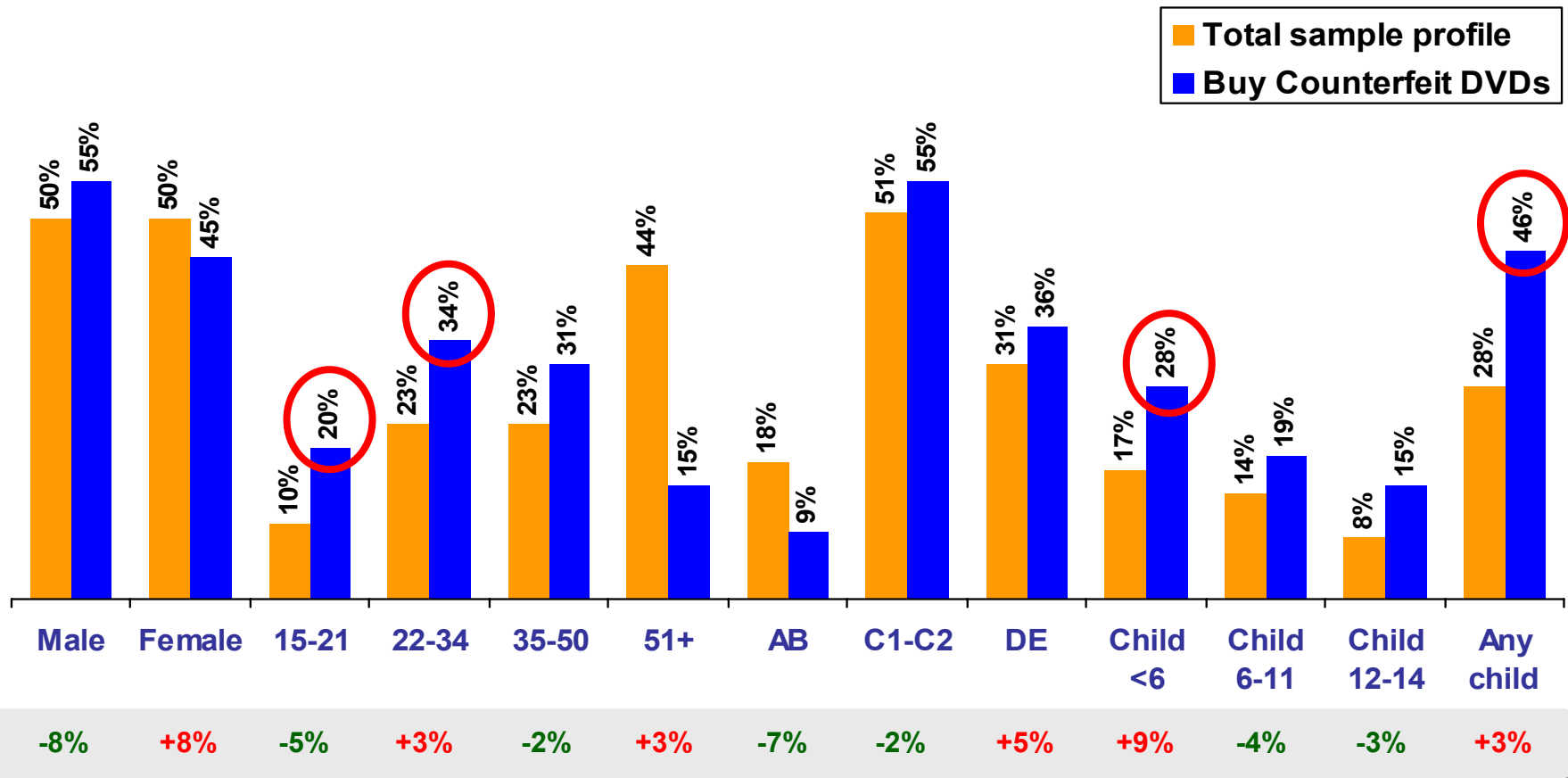
* Before Nov 06 question asked about DVDs (general), from Nov 06 question asked about DVDs of films and TV series

Counterfeit DVD buyers: Profile (Film & TV series)

Demographics



- Comparing the profile of the buyers of Counterfeit DVDs against the overall sample profile reveals that this group has a higher proportion of individuals who are male, and who are aged 15-34 and who have children under 6



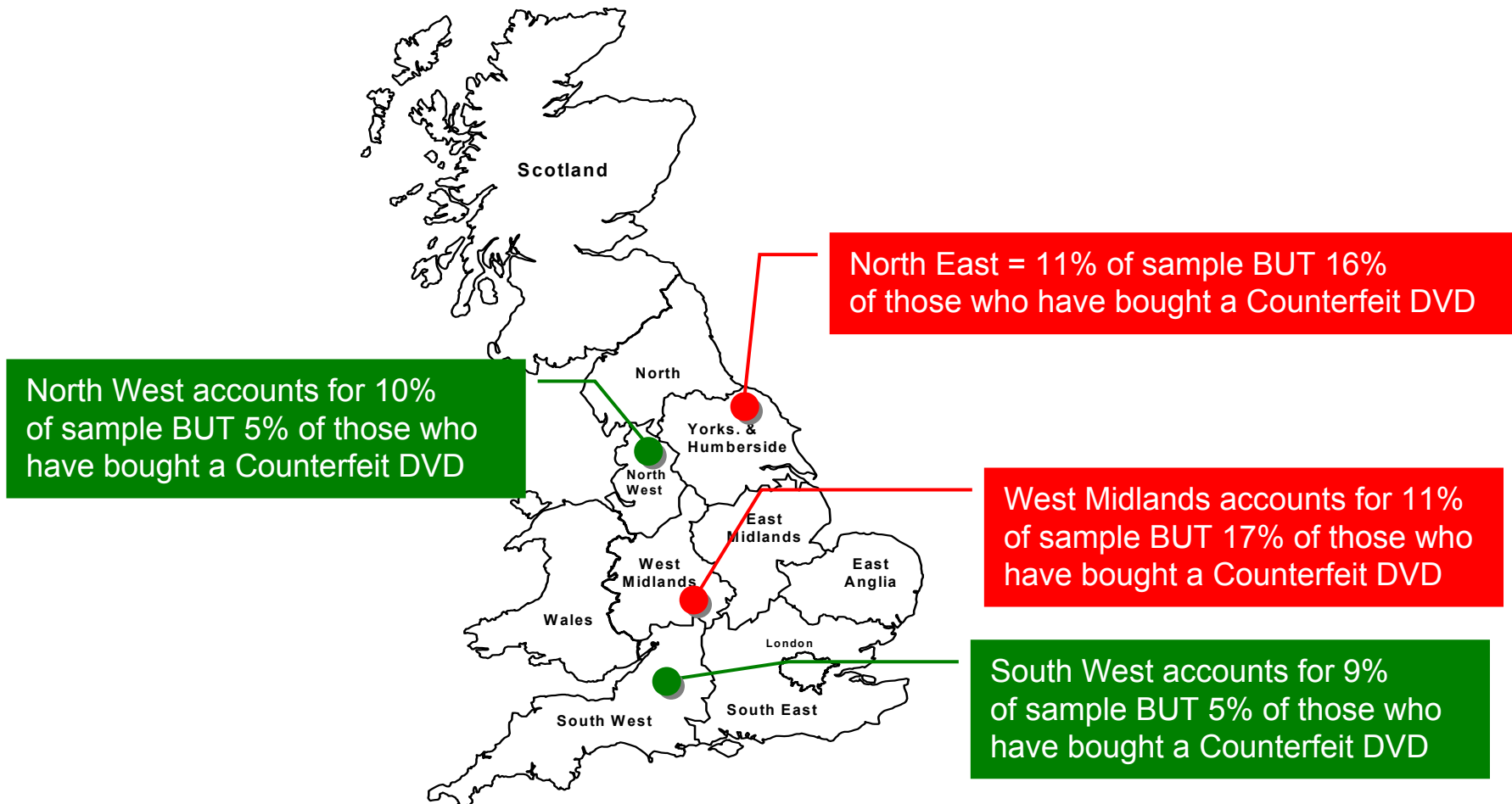
PARENTS OF...

Counterfeit DVD buyers: Profile (Film & TV series)

Region

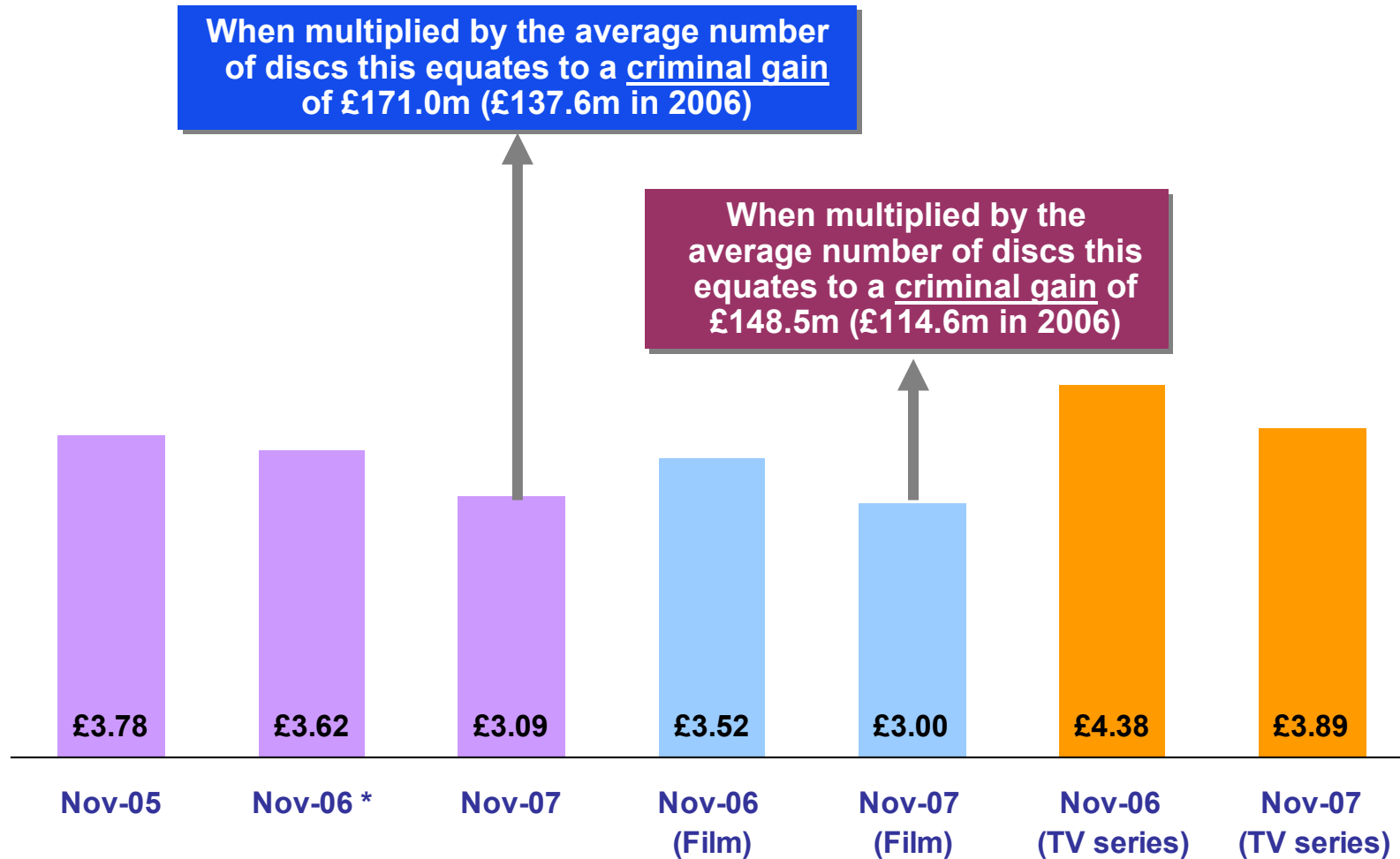


- If we compare the profile across the regions we can see that buyers of Counterfeit DVDs are more likely to live in the North East and the West Midlands and less likely to live in the North West and South West.



Average price paid for counterfeit DVDs

- The price of Counterfeit DVDs continues to decline in price over time and is now at of £3.09 on average.



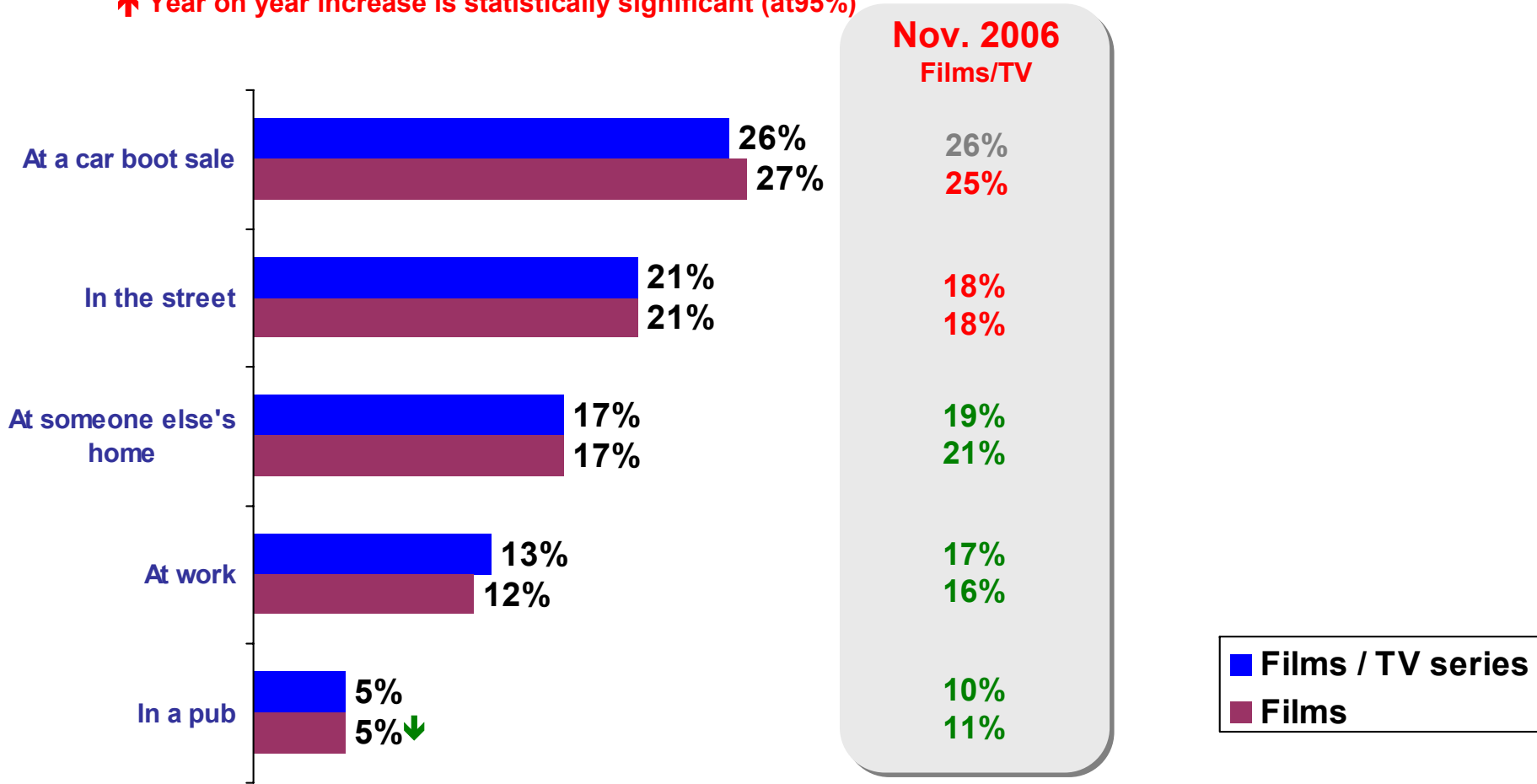
Where buy most Counterfeit Films/TV series (Top 5 locations)



• Films and TV series on pirate DVDs are most commonly purchased at car boot sales and in the street.

↓ Year on year decrease is statistically significant (at 95%)

↑ Year on year increase is statistically significant (at 95%)



Those watching Counterfeit/Home Copied Films/TV series are more likely to agree to:



- Cost saving, range of titles available, and getting hold of the titles before official street release remain the main motivations for those buying counterfeit DVDs.

↓ Year on year decrease is statistically significant (at 95%) ↑ Year on year increase is statistically significant (at 95%)	Buying Counterfeit DVDs		Buying Home copied DVDs	
	2007	2006	2007	2006
It is much cheaper than buying official DVDs	89%	87%	91%	78%
There's a wide selection of films available	83%	82%	61%	74%
It is cheaper than going to the cinema	83%	81%	98% ↑	77%
It means I can buy more DVDs	76%	74%	50% ↓	72%
It means I don't have to wait for the official release in the shops	74%	77%	73%	77%
All the new film releases are available	74%	72%	55%	60%
I get hold of films which I wouldn't otherwise buy	71%	62%	77%	69%
The movie industry makes too much money	68%	59%	68%	66%
They are ok in quality	61%	52%	73%	62%
I have no interest in the bonus features which you get on official DVDs	55%	48%	58%	55%
It's less hassle than buying DVDs from shops	52%	51%	53%	61%
Pirate DVDs are not really harming anyone	48%	46%	64% ↑	40%
Once films and programmes have been broadcast on TV they're free to copy	48%	NA	41%	NA
I find it more difficult to get to the cinema nowadays but still want to see the latest releases as soon as they come out	47% ↓	60%	62%	61%
There's a wide selection of TV series available	46%	44%	82% ↑	49%
I can see specific TV series which are no longer available on TV	45%	40%	47%	44%
Watching a film in a cinema is not as enjoyable as it used to be	43%	38%	76% ↑	51%
I can see specific TV series/ episodes I have missed	40%	38%	88% ↑	38%
I can see TV series which have yet to play on UK TV	38%	43%	59% ↑	42%
It keeps me ahead of the crowd	34%	42%	62%	50%
BASE	178	166	66	66

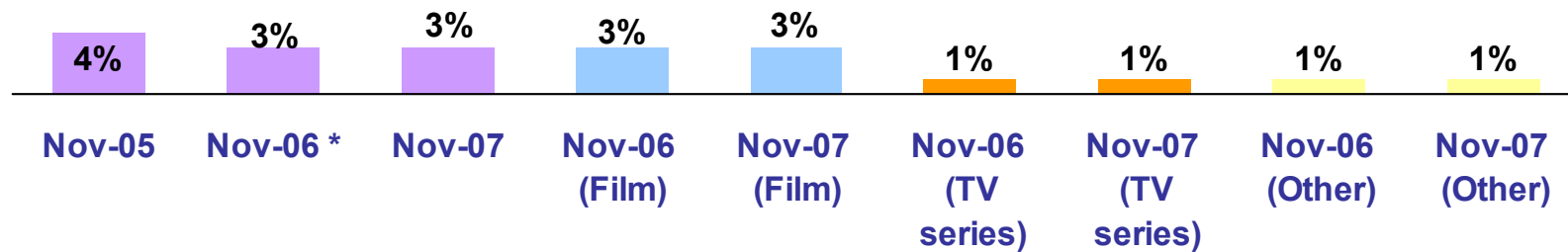
Reasons given for NOT watching pirated Films/TV series

- Preference for official copies, wariness towards sellers and how the money is used appear as the main motivators for those who don't buy pirate DVDs

<p>↓ Year on year decrease is statistically significant (at 95%)</p> <p>↑ Year on year increase is statistically significant (at 95%)</p>	Those not buying pirate DVDs		Those buying fewer pirate DVDs	
	2007	2006	2007	2006
I would rather own the official release	64%	64%	49%	52%
It's giving money to criminals	60%	60%	51%	44%
I don't trust the people selling them	61%	61%	46%	38%
I don't often see them for sale	56%	55%	49%	35%
The quality is not good enough	51%	53%	50%	62%
I'm concerned they won't work in my DVD player	45%	48%	51%	49%
I would rather see the film in the cinema	46%	46%	46%	42%
They are having a negative impact on the film / TV Industry	55%	55%	37%	45%
I want to have the official packaging	48%	48%	40%	50%
I'm against the idea of illegal copying of films / TV series	60%	61%	26%	37%
It's a bit 'downmarket'	44%	44%	30%	43%
I want to have bonus features as well as the film / TV series	33%	33%	34%	38%
It's giving money to people traffickers	35%	37%	23%	27%
Recent publicity or advertising about pirate DVDs has put me off	34%	34%	21%	26%
At current prices, it's too much money to risk	34%	↓ 40%	17%	↓ 34%
It's giving money to terrorists	31%	33%	16%	25%
The TV shows I like are never for sale	20%	22%	26%	29%
There's only a limited selection of films available	21%	↓ 26%	21%	25%
BASE	1805	1820	70	56

Percentage who have BOUGHT Home Copied DVDs

- There is no difference year-on-year in buying home copied DVDs with 3% of the population aged 15+ who did so in 2007.



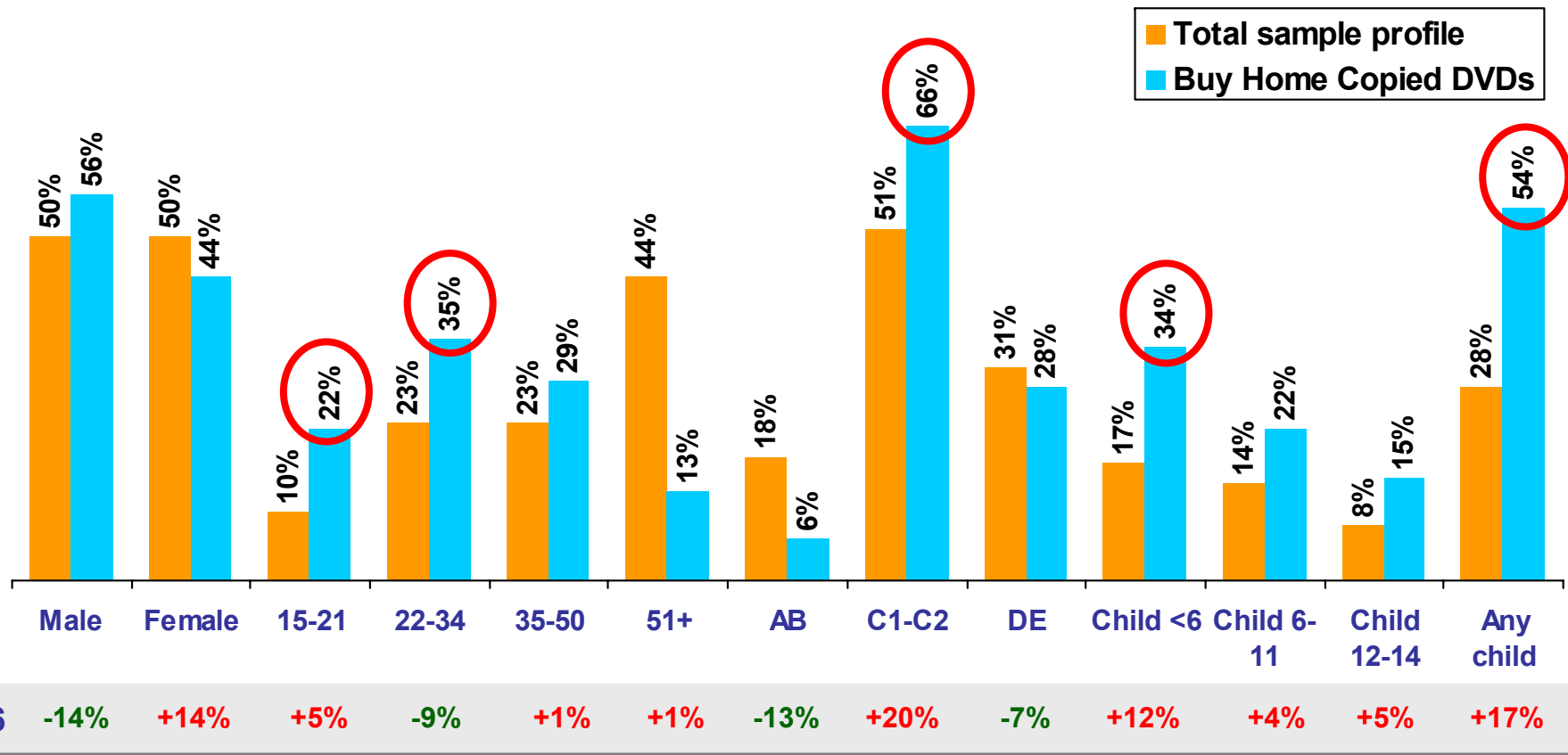
* Before Nov 06 question asked about DVDs (general), from Nov 06 question asked about DVDs of films and TV series

Home Copied DVD buyers: Profile (Film & TV series)

Demographics



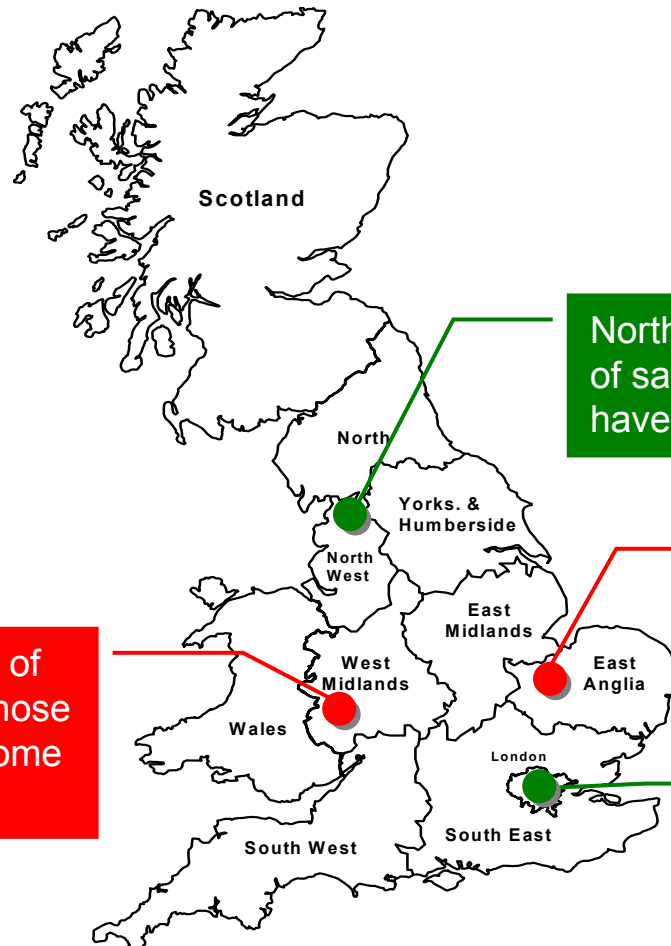
• If we compare the profile of buyers of Home Copied DVDs against the overall sample this group is characterised by a higher proportions of under 50 year old males, C1-C2 and parents.



PARENTS OF...

Home Copied DVD buyers: Profile (Film & TV series) Region

- The purchase of Home copied DVDs is more prevalent in East Anglia and West Midlands.



North West accounts for 10% of sample BUT only 1% of those who have bought a Counterfeit DVD

East Anglia = 6% of sample BUT 10% of those who have bought a Home Copied DVD

West Midlands = 11% of sample BUT 16% of those who have bought a Home Copied DVD

Greater London accounts for 11% of sample BUT 7% of those who have bought a Counterfeit DVD

Average price paid for Home Copied DVDs

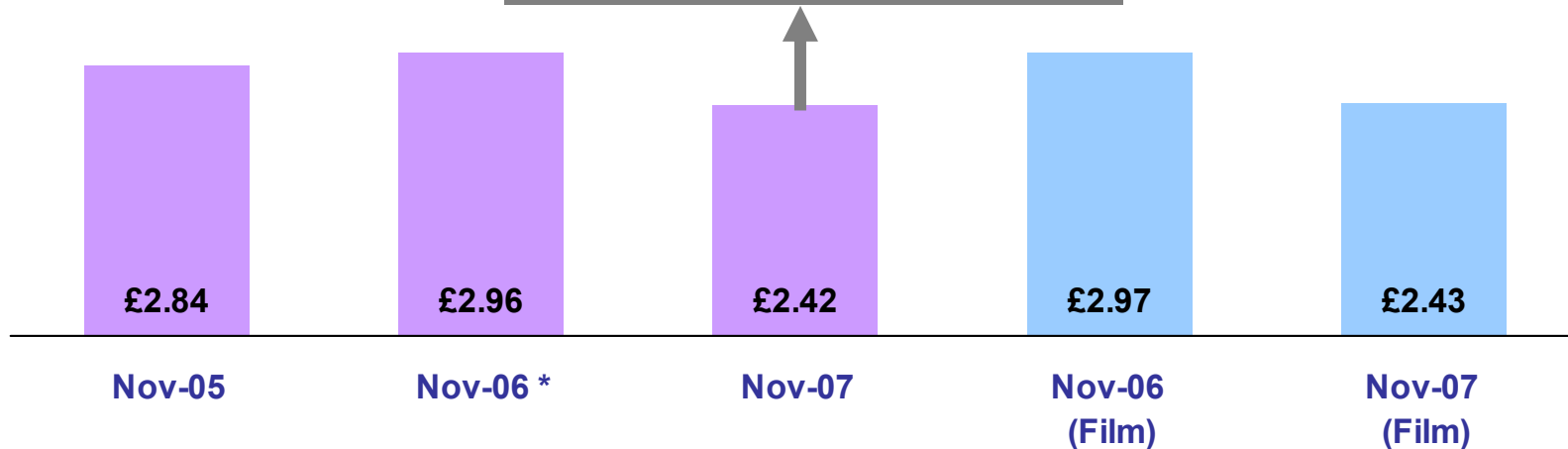
- Home copied DVDs are (not surprisingly) cheaper (by 20%) compared to the price of counterfeit DVDs.



Low Bases

Total Criminal Gain is £200m (Counterfeit and Home Copied DVDs)
 (in 2006 the figure was equivalent to £169m)

When multiplied by the average number of discs this equates to a criminal gain of £29.4m (£31.5m in 2006)



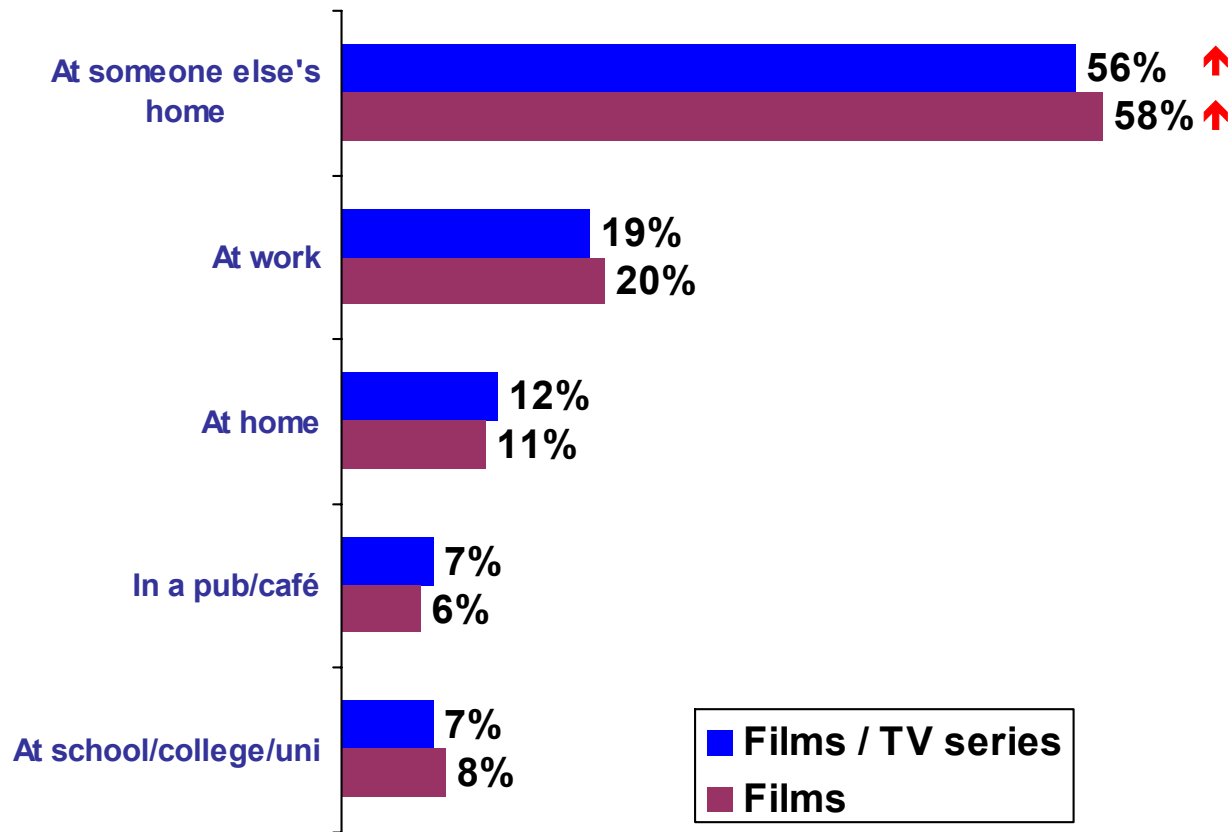
Where buy most Home Copied DVDs (Top 5 locations)

• A vast majority of those buying home copied DVDs do this at someone else's home with a further fifth buying at work.

↓ Year on year decrease is statistically significant (at 95%)

↑ Year on year increase is statistically significant (at 95%)

 **Low Bases**



Nov. 2006

Films/TV

32%

32%

31%

35%

14%

8%

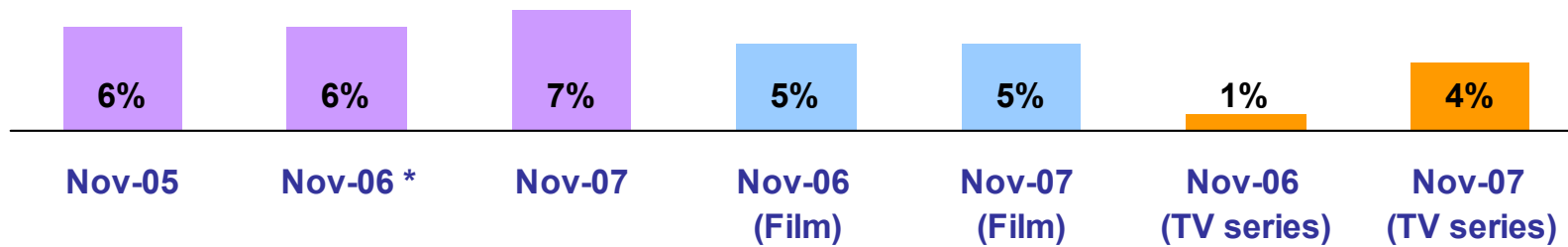
12%

11%

1. Approach / Key findings
2. Piracy: The scale of the problem
3. Impact of Piracy: Film and TV Series
4. Counterfeit and Home Copied DVDs
5. Downloading and Burning
6. Borrowing and Viewing

Percentage who have Downloaded Films/TV series

• Overall the percentage of those involved in downloading piracy has gone down.



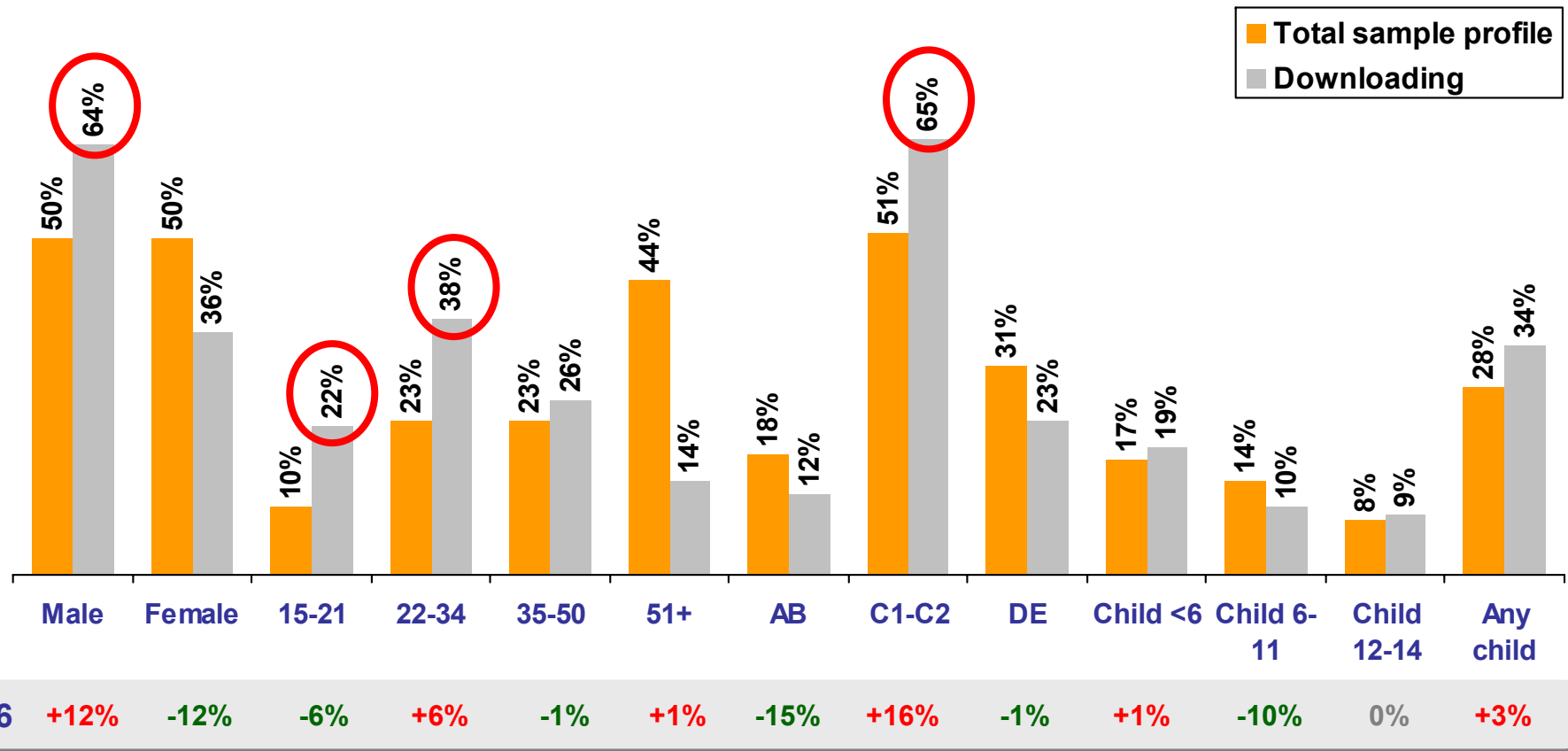
* Before Nov 06 question asked about DVDs (general), from Nov 06 question asked about DVDs of films and TV series

Downloading: Profile (Film & TV series)

Demographics



• Downloader's are significantly more likely to be male and to be under 34 than the overall population.



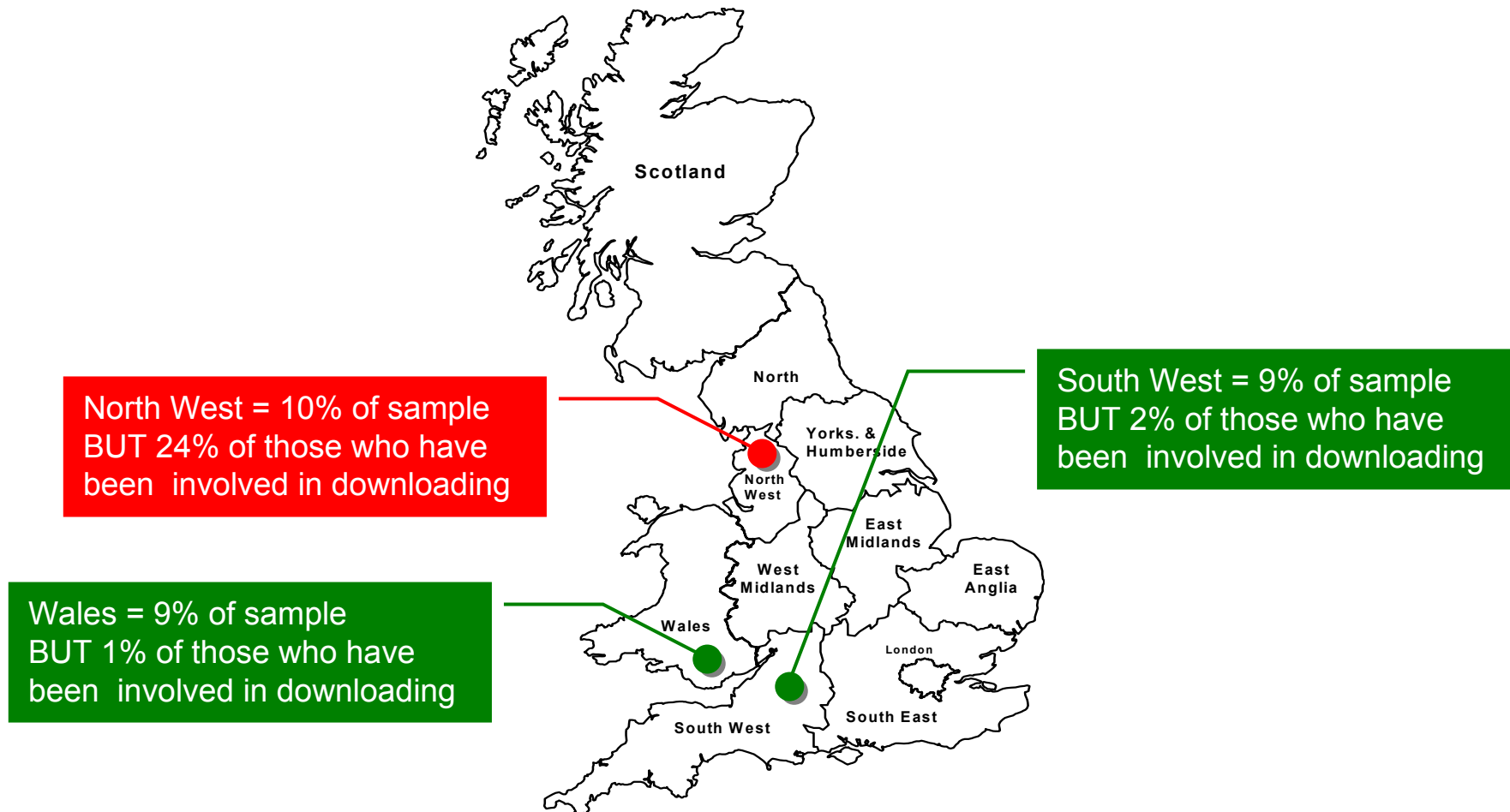
* Official downloading is included in the 2007 profile for consistency sake

PARENTS OF...

Downloading: Profile (Film & TV series) Region

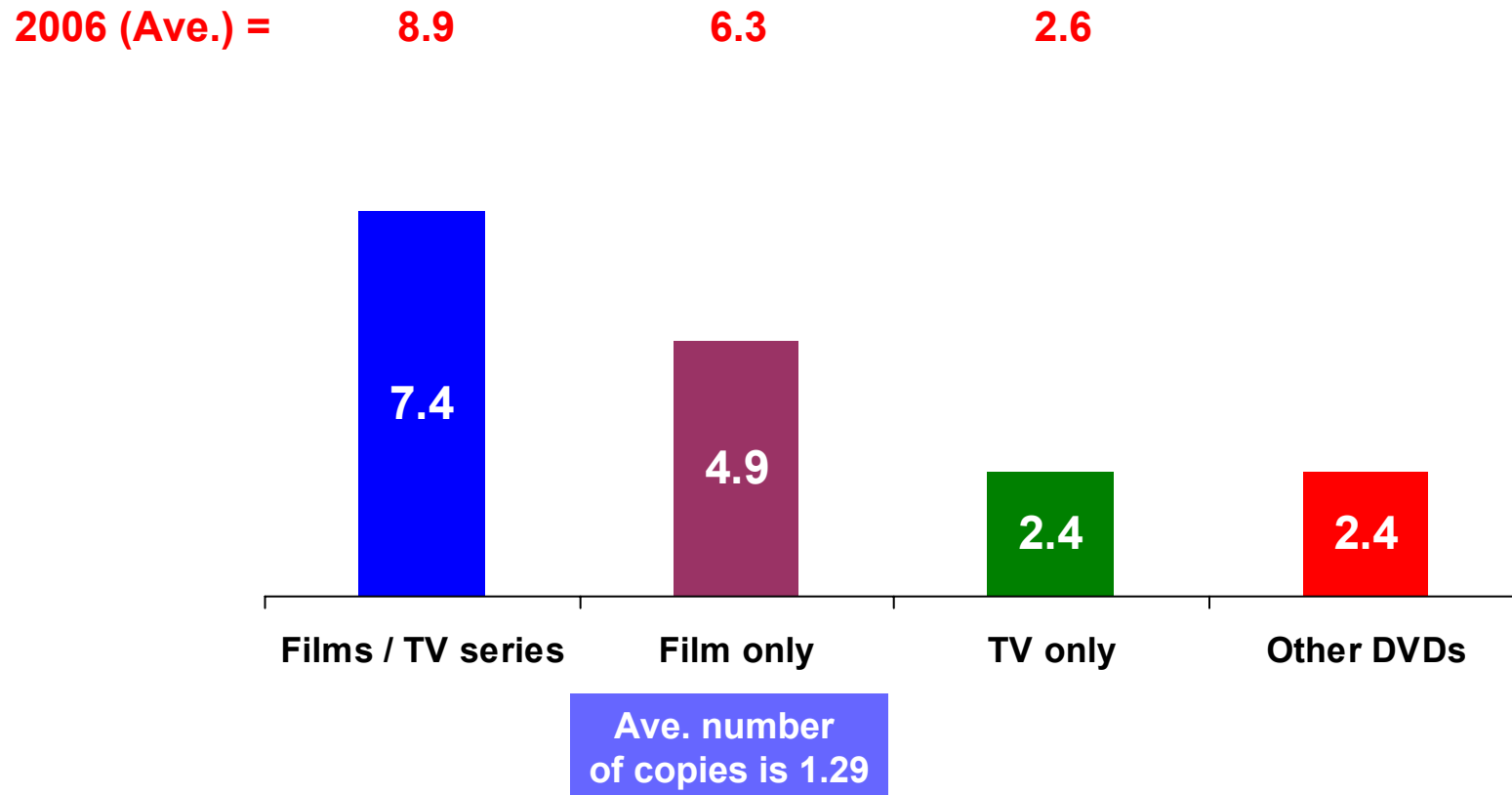


- Downloading is particularly popular in the North West, whilst this form of piracy is less prevalent in South West and Wales.



Number of Films/TV series 'Burned' in the last 12 months

- Those involved in burning DVDs at home, made copies of an average of 7 films/TV series.



Where source most Films burned (Top 5 sources)

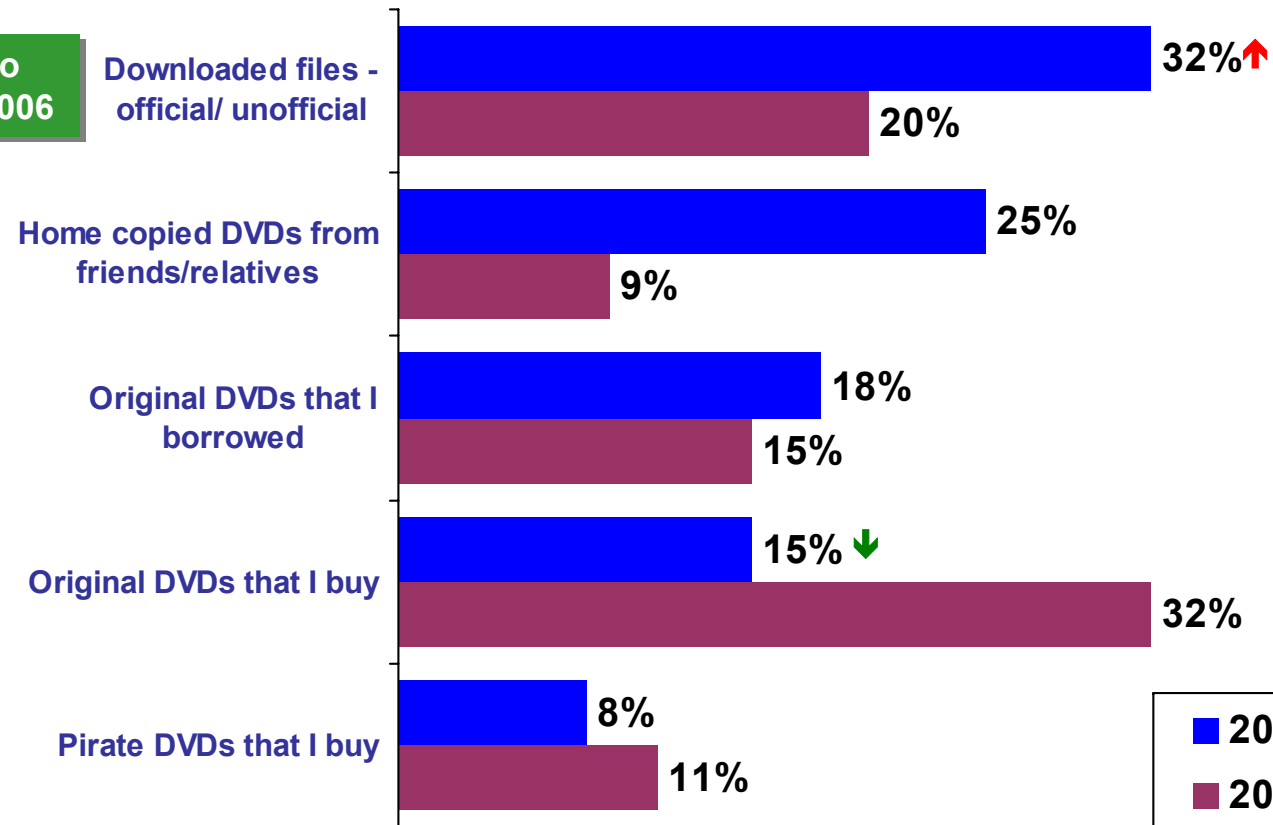
- Downloaded copies and Home copied DVDs are the source of around half of the burned DVDs.
- Original DVDs are the source of 15% of burned DVDs, but the number of burned from home copied DVDs has halved since 2006.

↓ Year on year decrease is statistically significant (at 95%)

↑ Year on year increase is statistically significant (at 95%)

 Low Bases

This code was not split into 'Official' and 'Unofficial' in 2006

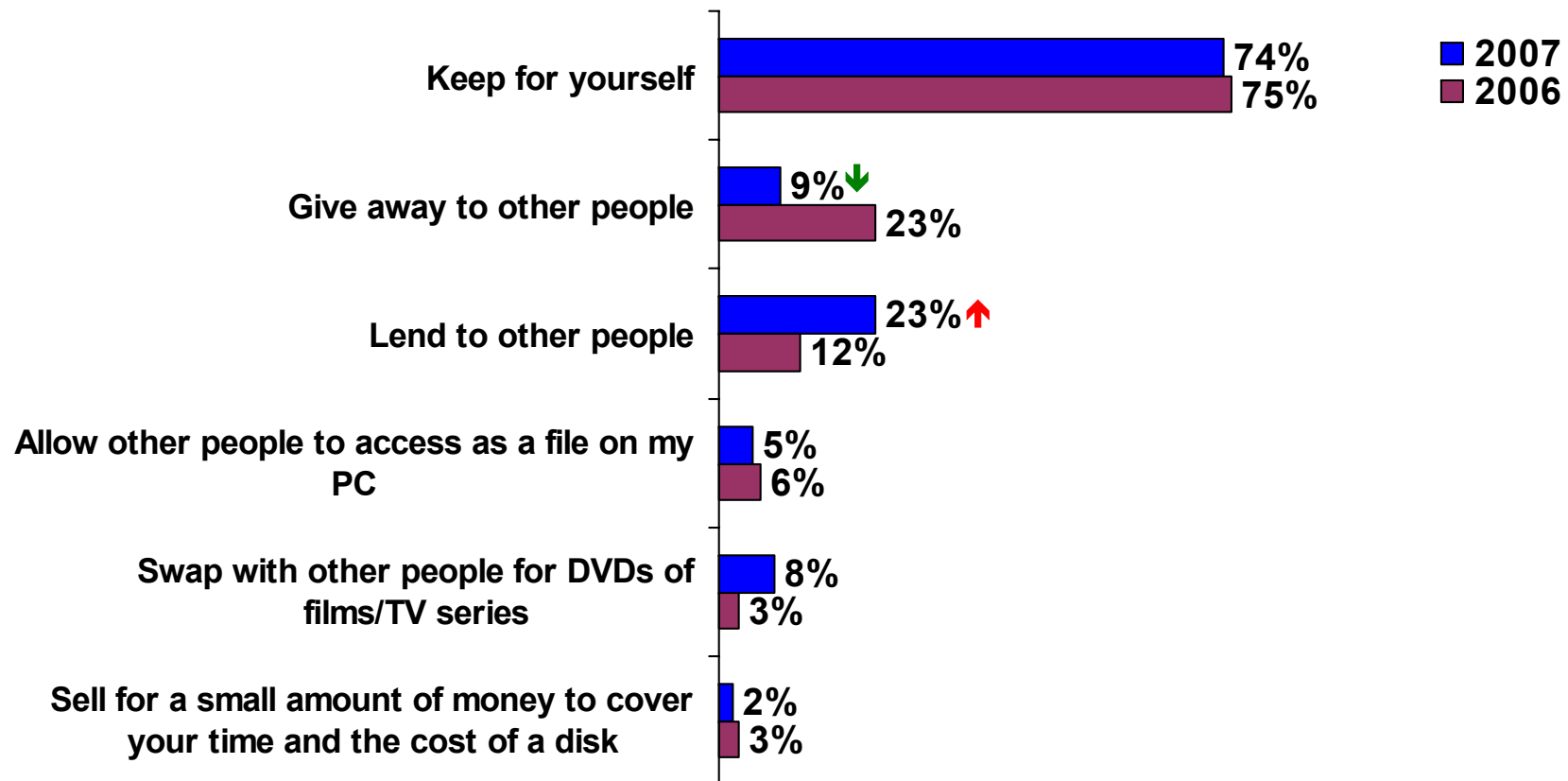


What is done with the unofficial copies made

- Three quarters of respondents keep at least one unofficial copy for themselves.
- Giving away/ lending (in combination) remains stable over time.

↓ Year on year decrease is statistically significant (at 95%)

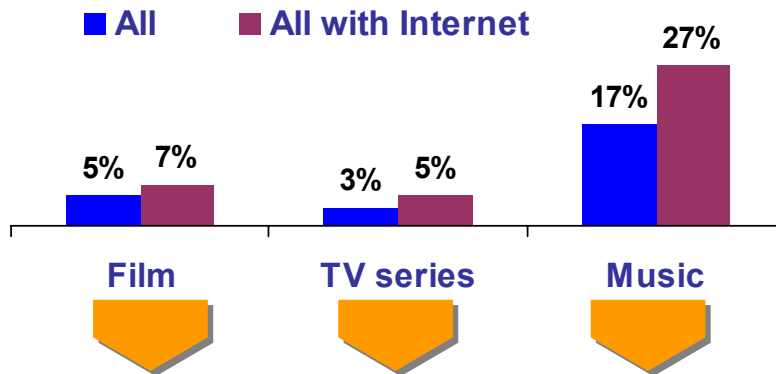
↑ Year on year increase is statistically significant (at 95%)



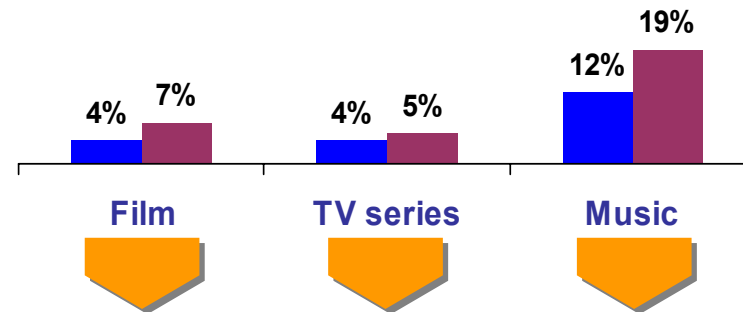
Percentage who would anticipate in Official/ Unofficial downloading* in next 12 months

- When asked about downloading in the next 12 months, around 5% would anticipate in both Official or Unofficial downloading.
- Potential music piracy is lower compared to the number of those anticipating in downloading music officially.

Official ONLY



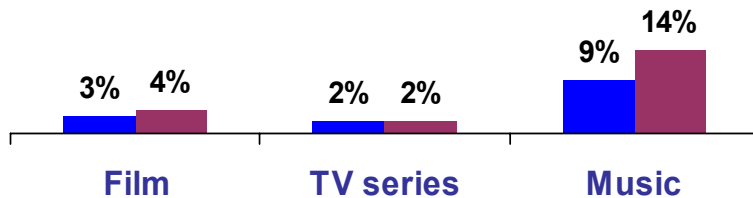
Unofficial ONLY



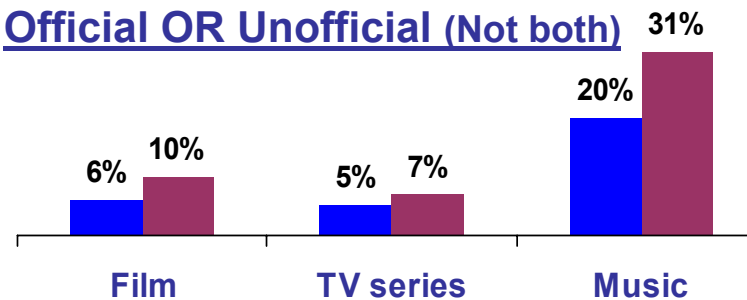
Net 'Definitely/probably' will download:

89% 67% 56% 57% 67% 90% 69% 71% 49% 57% 83% 84%

Official AND Unofficial (Both)



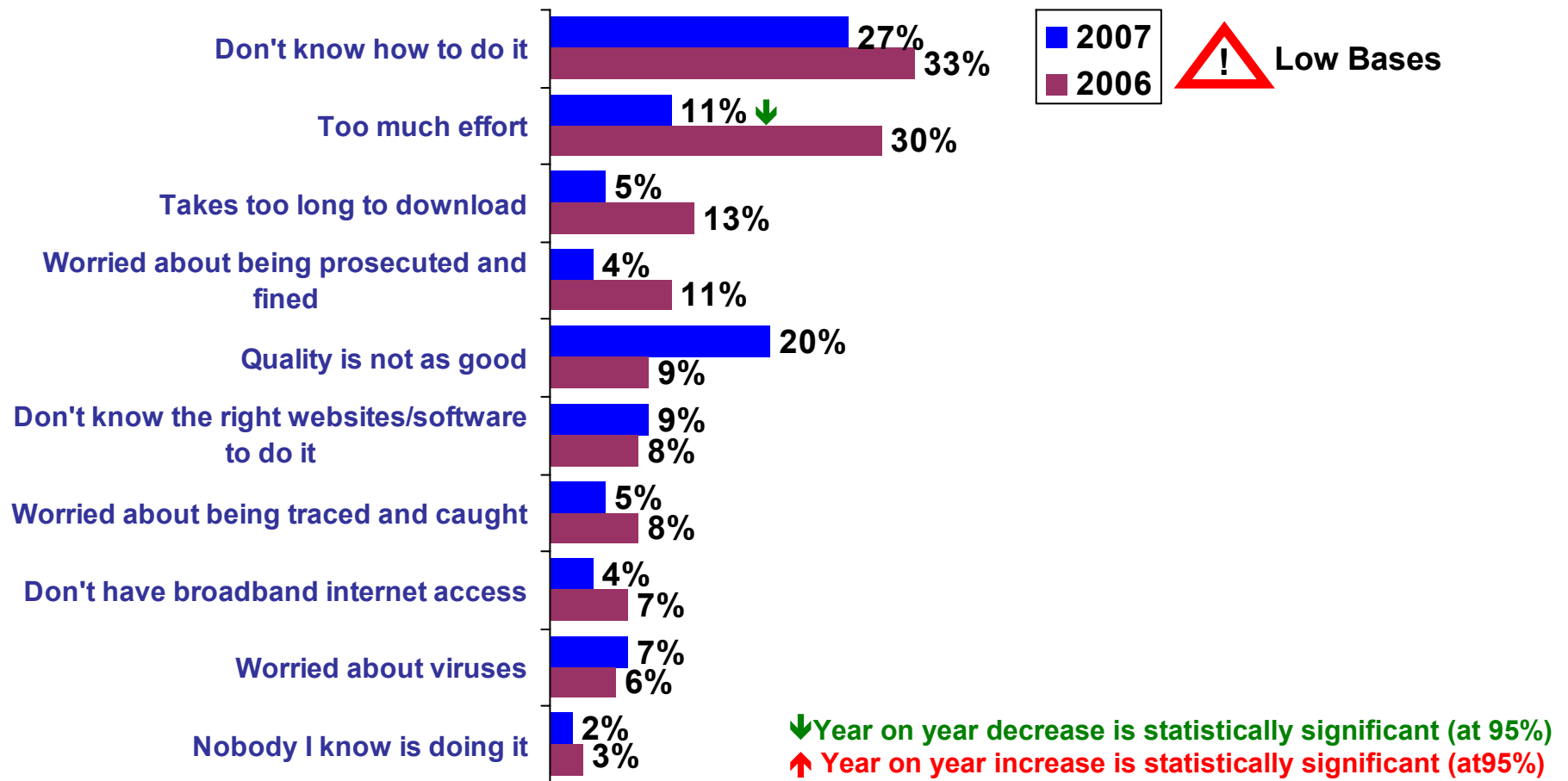
Official OR Unofficial (Not both)



* Before Nov 07 question was asked about downloading, in Nov 07 the question was split into downloading officially and unofficially

Why have you not Downloaded previously

- The main reasons for not downloading previously are 'Don't know how to do it' and 'Quality is not as good'.
- The latter figure has more than doubled year on year at 20% (up from 9% in 2006).
- However less people think it is 'Too much effort' and noticeably less have expressed concerns about 'being prosecuted and fined'.



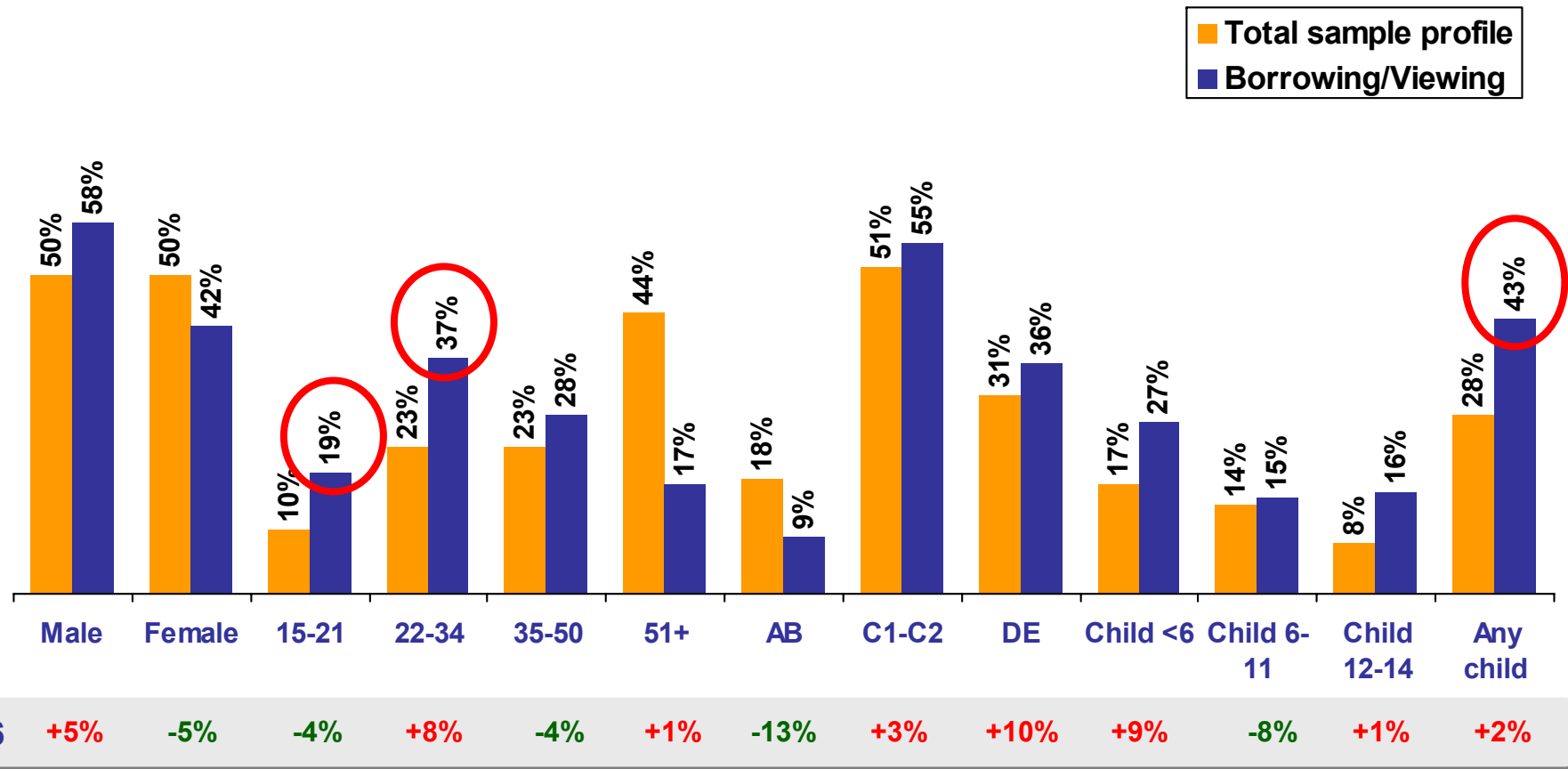
1. Approach / Key findings
2. Piracy: The scale of the problem
3. Impact of Piracy: Film and TV Series
4. Counterfeit and Home Copied DVDs
5. Downloading and Burning
6. Borrowing and Viewing

Borrowing & Viewing: Profile (Film & TV series)

Demographics



- The Profile of Borrowers/Viewers like other forms of Piracy is male-biased and also Borrowers/ Viewers are more likely to be aged 15-34.

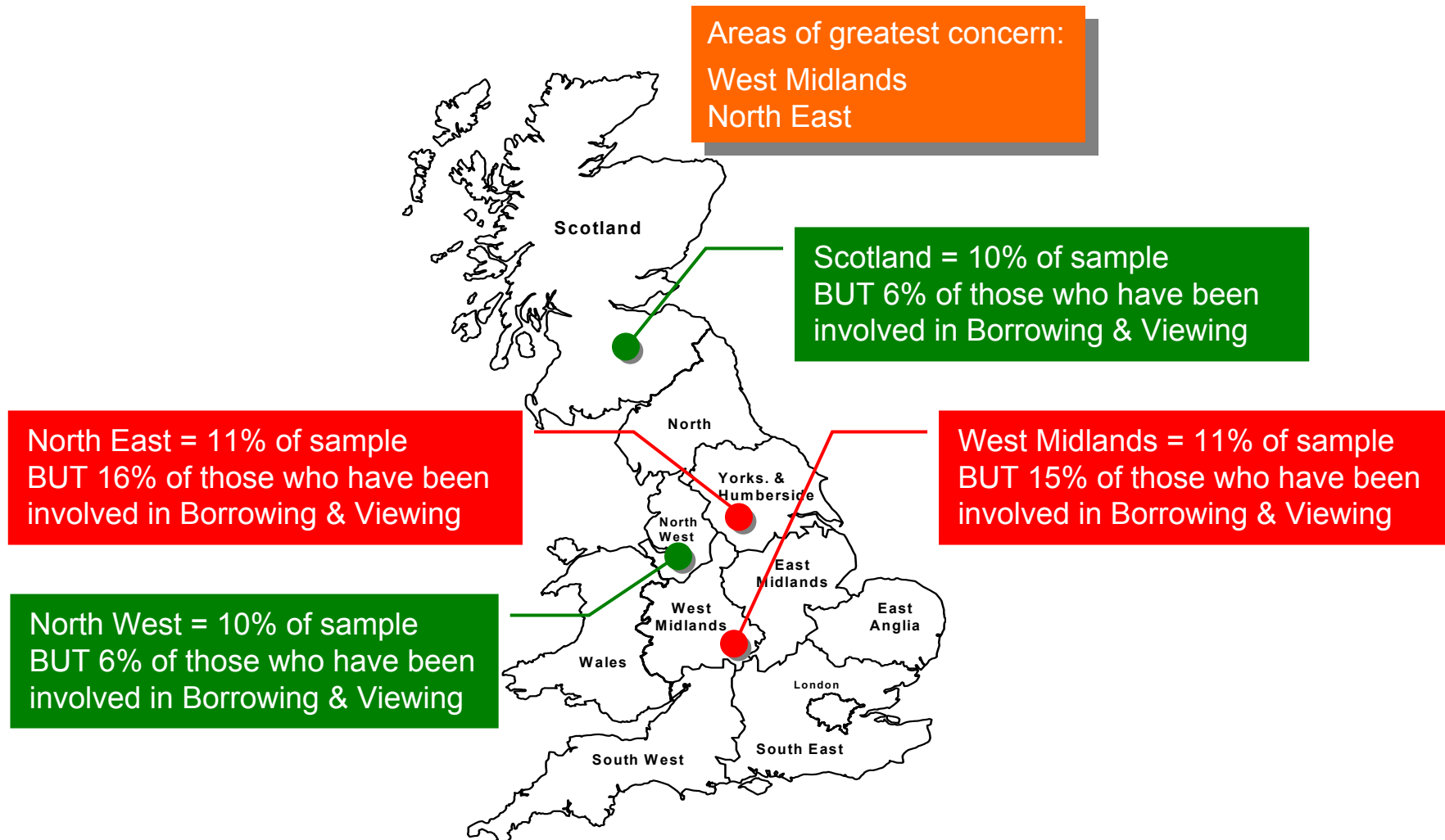


PARENTS OF...

Borrowing & Viewing: Profile (Film & TV series) Region



- The comparison of the profile of Borrowers & Viewers with the overall sample shows that activities are greater in the North East and the West Midlands.



Appendix



Film titles tested



1. Harry Potter and the Order of the Phoenix
2. Pirates Of The Caribbean: At World's End
3. The Simpsons Movie
4. Shrek The Third
5. Spider-Man 3
6. The Bourne Ultimatum
7. Mr. Bean's Holiday
8. Hot Fuzz
9. 300
10. Die Hard 4.0
11. Ocean's Thirteen
12. Flushed Away
13. Atonement
14. Run, Fat Boy, Run
15. Knocked Up
16. Blood Diamond
17. Miss Potter
18. Wild Hogs
19. The Last King Of Scotland
20. 28 Weeks Later
21. Bridge To Terabithia
22. Ghost Rider
23. Meet The Robinsons
24. Surf's Up
25. Hostel 2
26. The Hills Have Eyes II
27. The Brave One
28. I Want Candy
29. Perfect Stranger
30. Ratatouille

TV titles tested

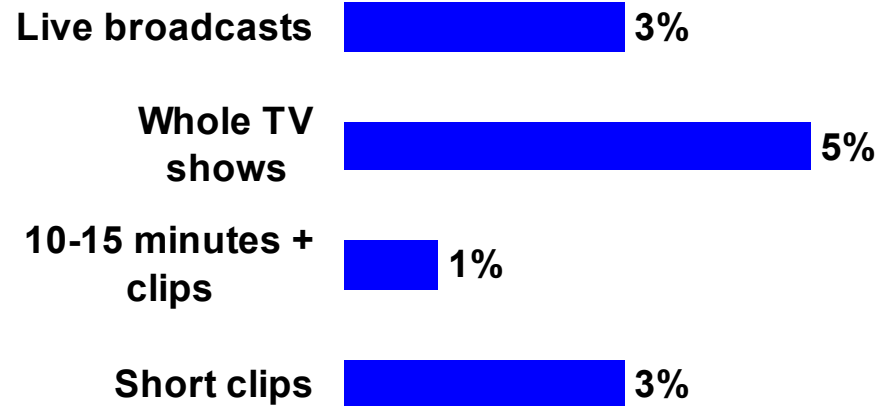
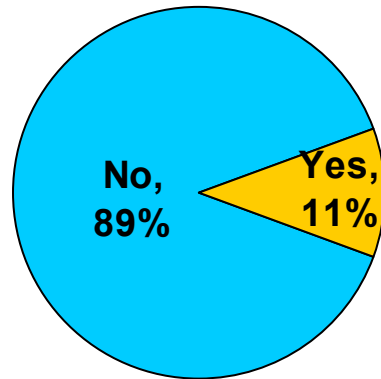


1. Heroes
2. Lost
3. Ugly Betty
4. Desperate Housewives
5. Secret Diary of a Call Girl
6. Dr. Who
7. The Simpsons
8. Grey's Anatomy
9. Entourage
10. CSI Original
11. Studio 60
12. Bones
13. Prison Break
14. Spooks
15. Flight of the Conchords
16. 24
17. Planet Earth
18. Peter Serafinowicz Show
19. Skins
20. Fonejacker
21. Peep show
22. Hollyoaks
23. Shameless
24. The Family Guy
25. Nothing but the Truth
26. Are you Smarter than a 10 year old
27. Pushing Daisies
28. Private Practice
29. Gossip Girl
30. Fifth Gear

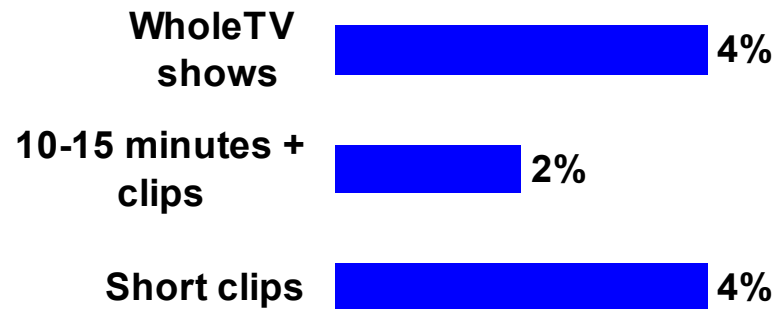
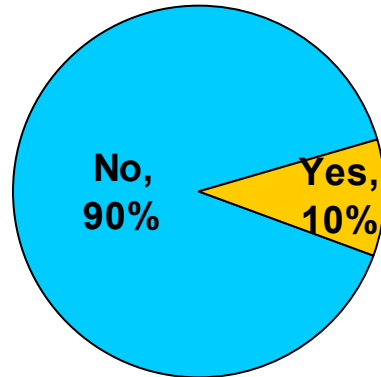
Viewing TV Programmes on Websites

- Around a tenth have watched Reality TV/ Comedy shows on a website.
- Almost half of those watched the full TV shows.

Reality TV



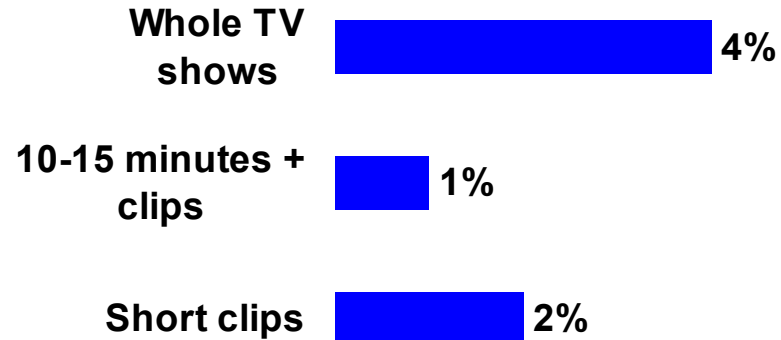
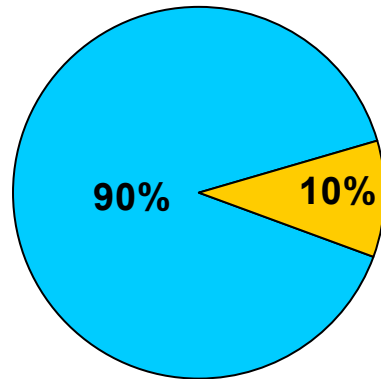
Comedy Show



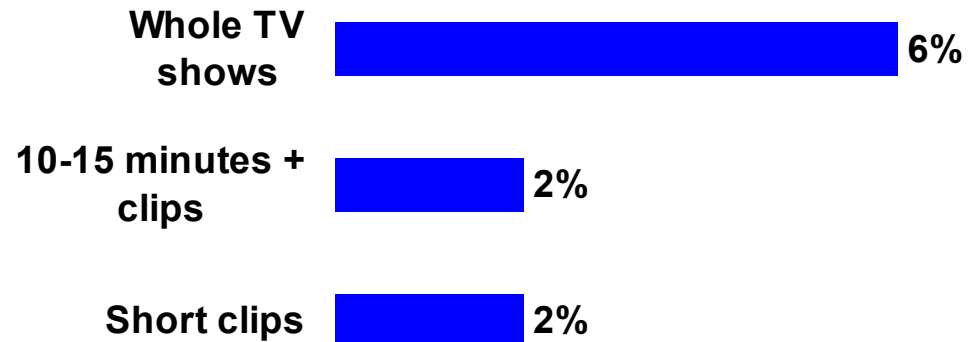
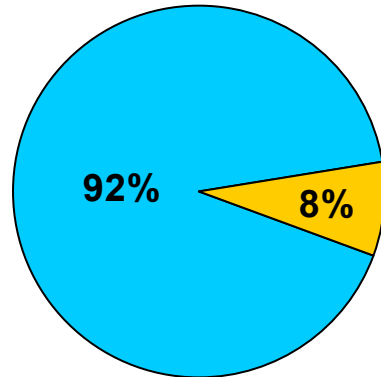
Viewing TV Programmes on Websites

- Slightly more people watched UK TV dramas on a website compared to US TV dramas.
- However more respondents have watched the whole US TV shows.

UK TV Drama



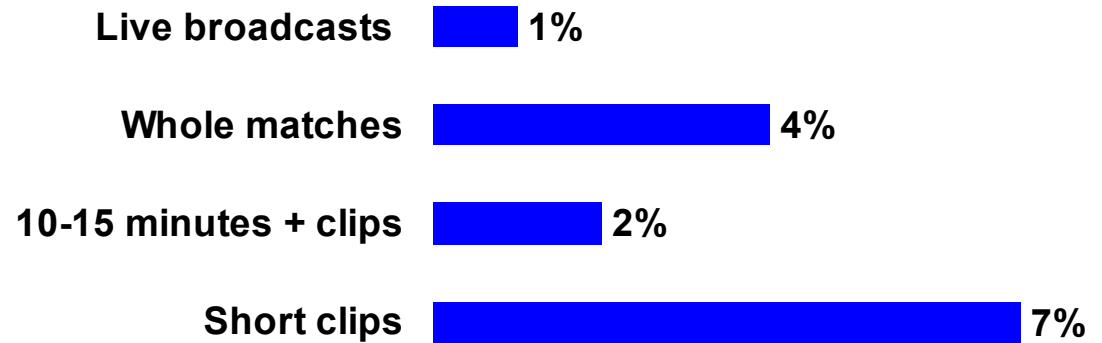
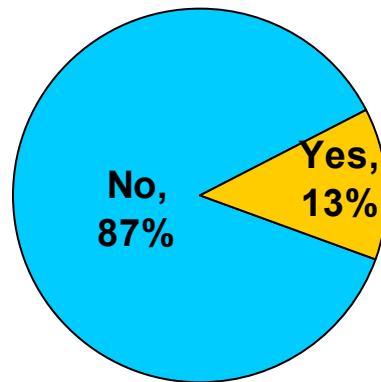
US TV Drama



Viewing TV Programmes on Websites

- 13% claim to have watched football matches on a website.
- Short clips account for over a half of the football related content watched on a website.

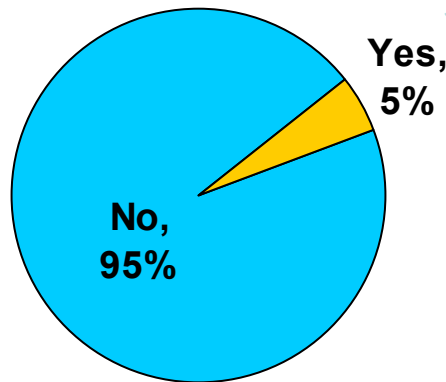
Premiership or Champion's League football matches



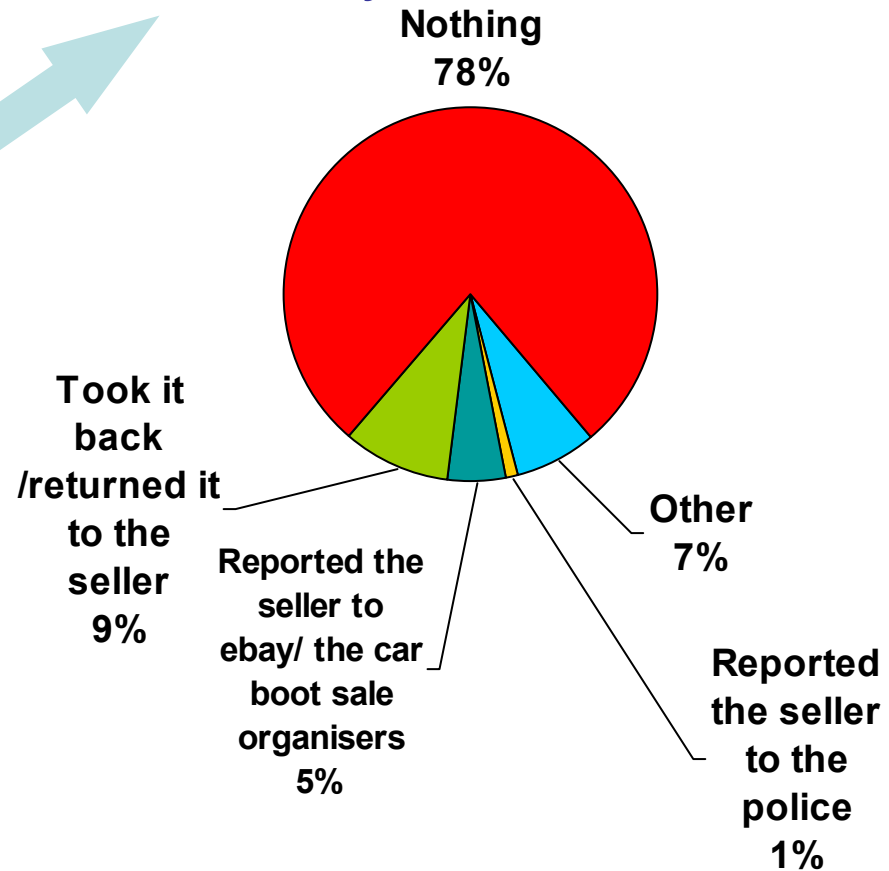
Buying Pirate DVDs In Good Faith

- The percentage of those who bought a counterfeit copy expecting it to be an original DVD is only 5%.
- Most of those - 78% - did nothing about this, whilst 9% returned it back to the seller.

Have you ever bought a pirate DVD when you were expecting it to be a real one - e.g. from ebay, car boot sales etc?



What did you do about it?



Thank you!

If you have any questions regarding this presentation, please feel free to contact:

Jean-Philippe Siri
jean-philippe.siri@ipsos-mori.com

Rimantas Reimontas
rimantas.reimontas@ipsos-mori.com