



Understanding Consumer Attitudes on Counterfeiting and Piracy

Public Awareness Campaign

An ICC initiative
BASCAP
Business Action to Stop
Counterfeiting and Piracy



A 15 MONTH (2008 - 2009) PROCESS REVEALED A NUMBER OF KEY FINDINGS

DESK RESEARCH:

July 08 / Feb. 09

1. Analysed hundreds of consumer surveys that have been conducted worldwide since 2000.
2. Conducted a first-ever global review of consumer awareness campaigns that have been implemented over the last 5 years.
3. Interviewed expert in the anti-counterfeiting field to collect best practices and learn implementation lessons for shaping an anti-counterfeiting programme.

QUALITATIVE RESEARCH:

March / July 09

Conducted focus groups to test a series of previously identified hypotheses.

To identify the drivers of counterfeit purchases, deterrent messages and communications tools.

To understand the linkage between the drivers of counterfeit purchase and message effectiveness.

20 focus Groups conducted in Capital cities (London, Mexico, Moscow, Delhi, Mumbai and Séoul).

QUANTITATIVE RESEARCH:

April / July 09

Launched a series of quantitative surveys in 5 key markets UK, Russia, Korea, Mexico and India.

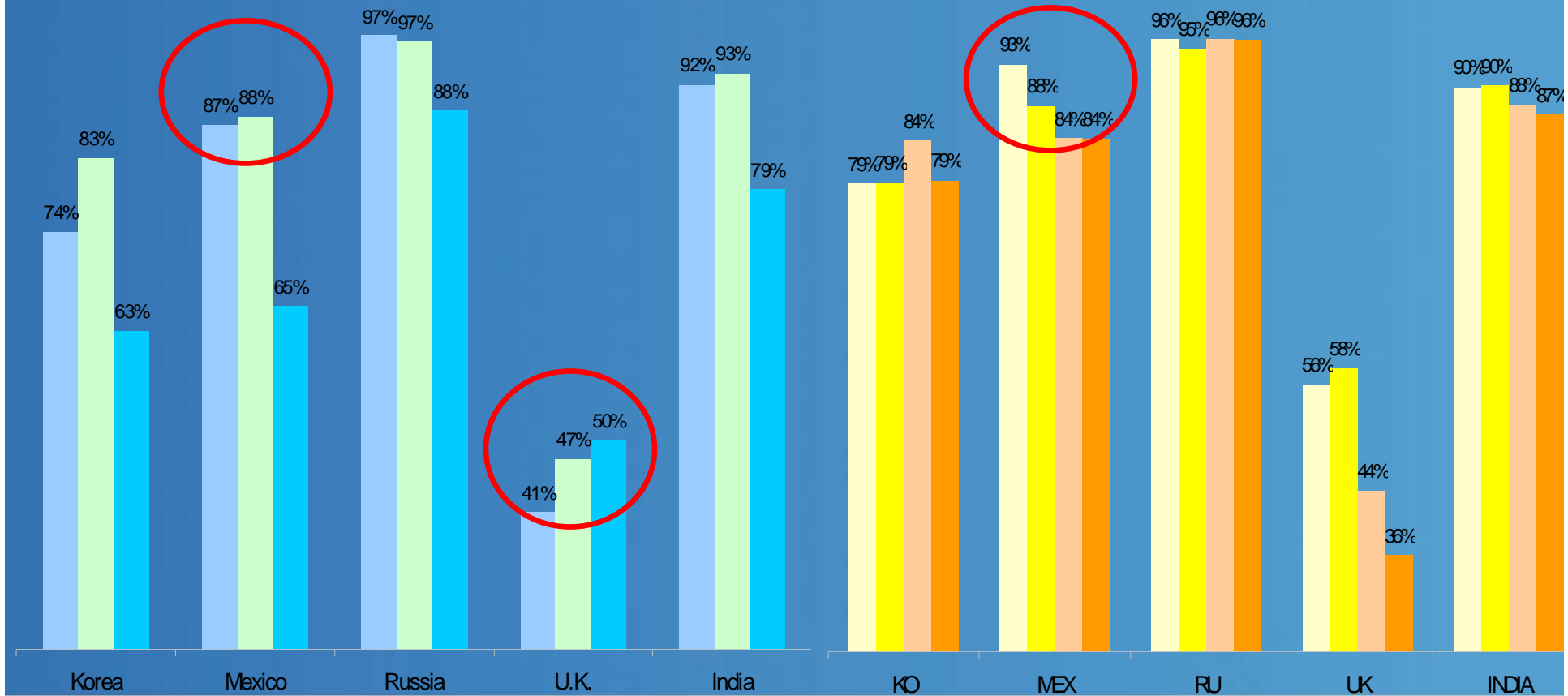
Built on the combined insights from the global desk research and the focus groups and validating the hypotheses tested in the focus groups .

Embraced development level diversity and addressed all product categories.

Nationally representative samples (1000 adults per country)

CP PURCHASERS ARE A DIVERSE POPULATION

Spanning all age groups and income levels



SO WHAT'S THE SOLUTION?

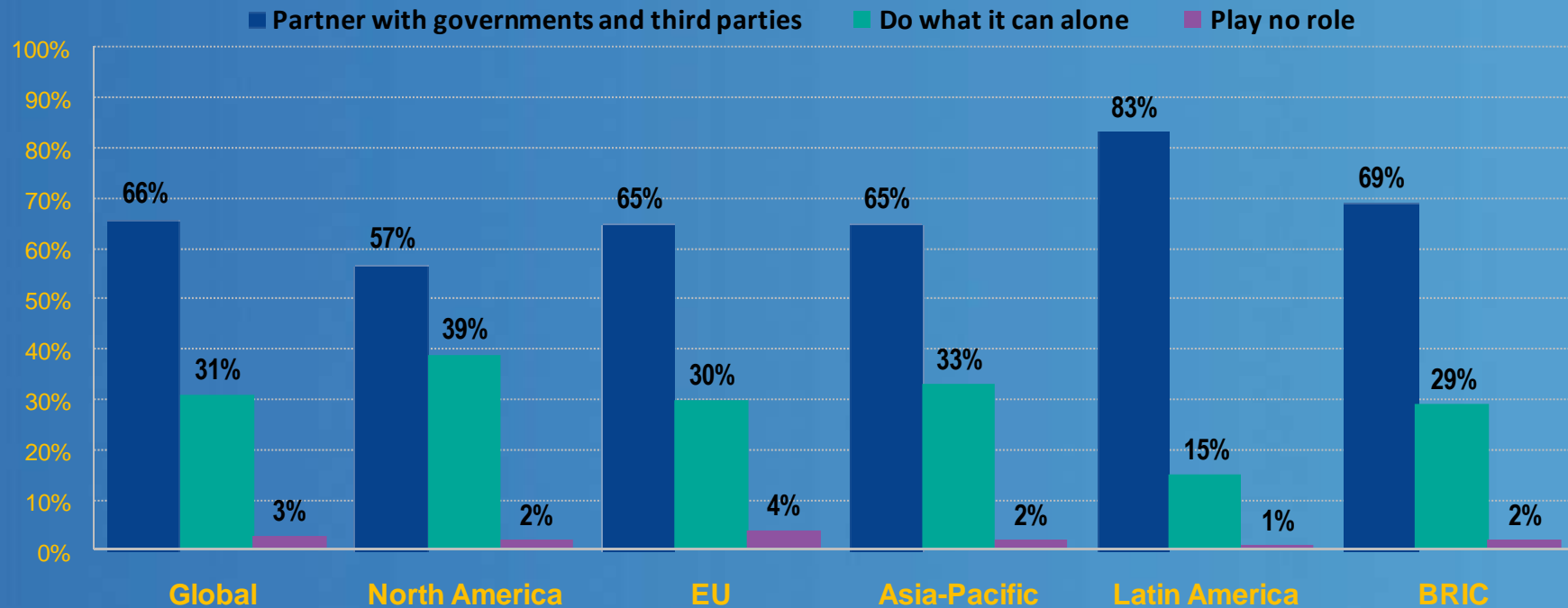
- A surround sound approach needs to be engaged - combining awareness and regulation
- Industry and government must work in lock step
- Purchasers must see there are real repercussions for purchasing CP products
- A personal connection needs to be made with the purchaser with a call to action
- You have to make a **personal connection** with a **call to action**
- The message needs to be supported by **proof points** - cost to health, jobs, personal, property and the economy
- It must be **scalable across sectors and geographies** and from global to local

**IT MUST BE UNITED BY A THEME THAT EMPOWERS
THE CONSUMER TO MAKE THE RIGHT CHOICE**

Supplemented by a tagline
that weighs the consequences
of...

**Prosecution
Incarceration
Loss of Reputation**

GOVERNMENT MUST PLAY A ROLE AS BUSINESS HAS LOST THE ABILITY TO LEAD UNILATERALLY



E139. Thinking about the role that business should play in helping to solve global issues such as energy costs, the financial credit crisis, global warming, or access to affordable healthcare, which of these following three statements is closest to your view? Business has to partner with governments and advocacy groups to solve these global issues, it cannot do it alone; OR Business should focus on what they themselves can do on these global issues, whether or not governments or others partner with them ; OR Business should not play a part in helping to solve these global issues (Informed publics 25-64 in 20 countries)

Glo-cal messengers

- National anti-counterfeiting associations
- Industry sector associations
- ICC national committees
- G8 governments
- Regional government partners: EU Observatory

BASCAP will provide capacity to 'glo-cal' messengers...

... Tools

- 1.Data - BASCAP, Eurobarometer
- 2.Guidance on how to interpret and use

... Creative

- 1.Global theme
- 2.Core messages
- 3.Prototype adverts
- 4.Model press releases, speeches, etc.

... Mission

- 1.Point of sales
- 2.Local markets
- 3.Airports
- 4.Schools
- 5.Consumer days