

MORNING CONSULT

TO: Interested Parties
FR: Morning Consult
DT: November 20, 2014
RE: National Survey Results on Brand and Intellectual Property

Morning Consult conducted a total national survey of 1,811 registered voters on November 13-16, 2014. Results from the full survey have a margin of error of $\pm 2.3\%$.

BOTTOM LINE:

In today's technology age, approximately one-quarter of Americans are frequent (weekly or more) online shoppers. Among this group of online shoppers, more than six-in-ten plan to make purchases of Clothing & Apparel (86%), Consumer Electronics (86%), Consumables (69%), Personal Care Hygiene Products (61%), or Luxury Goods (61%) for the holiday season. Across the board, genuine brands are important to more than eight-in-ten of these frequent online shoppers, regardless of the product category.

Top concerns regarding counterfeit goods are their connection to other (violent) crimes, the safety of the product, and the impact on American jobs.

Product safety (79%), and a product that works as advertised (77%), are both rated as "very important" by huge numbers of respondents. The product that has the lowest price is "very important" to only 36%. When asked directly, more than half of respondents (57%) are willing to pay some markup (the amount varies) to guarantee a genuine item.

KEY DATA

- ✓ ***There is a clear agreement that counterfeit goods are impacting the U.S. economy*** — Eight in ten voters say that this issue impacts the economy.
- ✓ ***Quality and Safety of counterfeit products are the top individual concerns for respondents*** — Product safety (93%) and a product working as advertised (93%) are the most important things on consumer's minds when making a purchase online.
- ✓ ***Counterfeit products are associated with other negative behavior*** — The top concern regarding counterfeit products tested, are that the sellers are linked to other crime such as human trafficking and drug trade (36%). Clearly, consumers who feel that they have a personal responsibility to spot and avoid counterfeits are concerned about where their money is going.
- ✓ ***Consumers make note of counterfeit goods not living up to the quality of the real thing*** — More than half (52%) of those who purchased counterfeit goods also agreed that the product was substandard.
- ✓ ***Respondents believe it is their personal responsibility to protect themselves from counterfeit goods*** — 62% of respondents believe that they are at least partially responsible for protecting themselves from counterfeit goods online. A total of 56% of respondents would like to see a consumer education campaign regarding counterfeit goods.