CONSUMER-LEVEL SURVEY REPORT

RESEARCH ON LEVELS OF AWARENESS AND EXTENT OF COUNTERFEITING IN KENYA

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PREPARED BY

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FOR

anti counterfeit authority
Upholding Authenticity

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EXECUTIVE SUMMARY

Counterfeiting is a growing global issue that undermines brand integrity, erodes consumer trust, and causes significant economic losses. This research sought to evaluate the extent and level of public awareness regarding counterfeiting in Kenya using a mixed-methods approach that combined quantitative surveys and qualitative interviews for a comprehensive analysis. The study was conducted across eight counties, with a focus on key counterfeit hotspots such as Nairobi, Mombasa, and Kisumu, as identified by the baseline survey done by Anti-counterfeit Authority in 2020, involving a sample of 2,185 respondents determined using Cochran's formula. Data collection utilized Computer-Assisted Personal Interviews (CAPI) through Kobo Toolbox, which ensured data accuracy and real-time monitoring, while research tools were standardized using the WIPO Consumer Survey Toolkit.

The findings revealed that general awareness of counterfeiting is relatively high at 83.85%, with significant regional variations. Busia (98%) and Machakos (90.8%) reported the highest awareness levels, while Garissa (66.7%) and Mombasa (63.6%) lagged behind. Sector-specific awareness showed that consumers are most informed about counterfeiting in agriculture (39.52%), alcoholic drinks (36.57%), and cosmetics (33.99%), whereas awareness was significantly lower in the paper and board (8.97%) and timber (5.13%) sectors. Consumers primarily gained information from brand knowledge (70.87%) and advertisements (54.28%), but the limited reach of ACA forums (8.61%) highlighted the need for alternative outreach strategies.

Consumer experiences indicated that 60.48% of respondents had purchased counterfeit goods, often unknowingly. Key sources of these goods included street sellers (59.37%) and shops/kiosks (54.42%), with online platforms (31.27%) emerging as a growing distribution channel. Agriculture was the most affected sector, with 89.16% of respondents identifying pesticides and herbicides as commonly counterfeited, followed by automotive spare parts at 81.89%.

The study also explored consumer behavior and mindsets, revealing that 69.56% of respondents unknowingly purchased counterfeits due to challenges in distinguishing genuine products. However, 86.43% indicated they would avoid counterfeit goods if they were more aware of their negative impacts. Despite this, price remains a key motivator for knowingly purchasing counterfeits, as reported by 42.5% of respondents.

The effectiveness of anti-counterfeit campaigns was found to be limited, with 60.3% of respondents indicating they had not encountered such initiatives. While social media (65.5%) and television (54.6%) campaigns had the widest reach, only 25.28% of respondents rated them as effective. Reporting counterfeit cases was rare, with 94.34% of respondents not reporting such incidents due to a lack of awareness about reporting mechanisms (26.86%) and scepticism regarding the likelihood of action being taken (36.08%). Key challenges identified include difficulty in distinguishing genuine products (38.64%) and the high cost of authentic goods (24.11%). Proposed solutions emphasized the importance of increasing public awareness campaigns (76.85%), empowering consumers (54.19%), and strengthening reporting mechanisms (64.18%).

The study recommends that to combat counterfeiting effectively, targeted region-specific awareness campaigns should be launched in low-awareness areas like Mombasa and Garissa, focusing on educating consumers about the risks of counterfeit goods. Empowering consumers through user-friendly digital tools, such as mobile apps and SMS-based verification systems, is crucial for product authentication. Promoting affordable alternatives to genuine products by reducing the cost of legitimate goods can address economic drivers of counterfeit purchases. Enhancing reporting mechanisms by simplifying the process and building trust in enforcement can encourage consumers to report counterfeit incidents. Lastly, fostering collaboration among government agencies, private sector players, consumer advocacy groups, and e-commerce platforms is essential for a unified and effective response to counterfeiting.

CHAPTER ONE: INTRODUCTION

1.1 Background of the study

Counterfeit goods refer to indistinguishable copies of the original products and brands. It also refers to the unauthorized manufacturing of products protected by intellectual property rights such as patents, copyrights, and trademarks. Counterfeiting of products on the market is a growing global problem affecting a wide range of industries, i.e., fashion, pharmaceuticals, cosmetics, electronics and food processing, among others (Peštek & Katica, 2022; Moon et al., 2018). The most recent estimates by the International Chamber of Commerce (ICC) (2017) placed the global economic value of counterfeit products at $0.9tn in 2015 and $1.9tn in 2019 (ICC, 2019).

Counterfeit products deprive governments of vital public service revenues, burden taxpayers more, shift hundreds of thousands of legitimate jobs, and expose consumers to dangerous and ineffective products (Antonopoulos et al., 2020). For instance, counterfeiting is estimated to contribute to 2.5 million job losses globally. Also, counterfeiting hurts companies in several ways. Diminished sales volume, brand values and company reputation are likely. Therefore, there is less incentive for companies to invest in new products and processes, and they also incur the costs of anti-counterfeiting initiatives that impact innovations and the development of new products (Tunçel, 2022). Although counterfeiting threatens all authentic products, luxury companies are the primary targets, registering a loss of approximately 60% to 70% of the estimated US$4.5tn total counterfeit trade in the global economy (Fontana et al., 2019).

Organisation for Economic Co-operation and Development (OECD) survey showed that international trade in counterfeit goods in 2019 was estimated at USD 464 billion, the equivalent of 2.5% of world trade, most of which originated in China (OECD, 2019). Several Asian economies, including India, Malaysia, Pakistan, Thailand, Turkey and Vietnam, are important producers in many sectors, although their role is much less significant than China's. Turkey appears to be an essential producer in some sectors, such as leather goods, foodstuffs and cosmetics. The report also identifies several important transit points for counterfeiting trade, including Hong Kong (China), Singapore and the United Arab Emirates, handling trade in counterfeit goods. Further, there are some important regional transit points. For example, several Middle Eastern economies (e.g. Saudi Arabia, the United Arab Emirates and Yemen) are important transit points for sending counterfeits to Africa.

In developing economies, the impact of counterfeiting is even more prevalent due to limited regulatory frameworks and enforcement capabilities, making it easier for counterfeit goods to proliferate the markets. This harms local businesses and poses severe health and safety risks to consumers, particularly concerning counterfeit medicines and food products. According to the World Health Organization (WHO) report of 2020, one in ten medical products in developing economies is either substandard or falsified, and 42% of detected cases of substandard or falsified pharmaceuticals occur in Africa (WHO, 2020). The global nature of trade allows counterfeit goods to cross borders easily, making it a complex issue that requires international cooperation and robust regulatory measures to combat effectively.

In Kenya, counterfeiting has emerged as a pervasive challenge affecting multiple sectors of the economy. The proliferation of counterfeit goods undermines consumer trust, disrupts legitimate business operations, and poses significant risks to public health and safety. The Anti-Counterfeit Authority (ACA) estimates that one out of every five products sold in the Kenyan market is counterfeit, resulting in an annual loss of KES 800 billion (ACA, 2021). This is despite a more than-average awareness of counterfeits. For instance, a 2021 survey by the ACA revealed that public awareness of counterfeiting in Kenya stood at 65.48%, highlighting the ongoing challenge of tackling counterfeits. This emphasizes the need for increased efforts in public education, regulatory enforcement, and international cooperation to address the prevalent issue of counterfeiting.

To effectively manage and control counterfeit trade, robust policies and strategies based on research-generated evidence and studies of counterfeit trade are essential. These efforts will help guide policy-making, increase public awareness, and inform strategic actions. Consequently, the current survey sought to provide research evidence on the level and extent of counterfeit products in Kenya to support developing policies and strategies that combat counterfeiting in Kenya and beyond.

1.1.1 Trends and economic impacts of counterfeiting

Counterfeiting has become a universal issue that affects various industries globally, with its scope and sophistication expanding significantly in recent years. The rise of digitalisation and e-commerce has made it easier for counterfeiters to distribute fake goods across borders, making online marketplaces and social media platforms key channels for the proliferation of counterfeit products (OECD, 2021). This trend has been observed across multiple sectors, including pharmaceuticals, electronics, luxury goods, and consumer products, where genuine and counterfeit items has become increasingly blurred leading to increased form of deceptive counterfeit products on the market.

The pharmaceutical industry, in particular, has been severely impacted, with counterfeit drugs posing significant health risks, especially in developing countries. These fake medications often contain incorrect dosages or harmful substances, leading to serious health complications for consumers (World Health Organization, 2020). During the COVID-19 pandemic, counterfeit personal protective equipment (PPE), vaccines, and testing kits flooded the market, exposing critical vulnerabilities in global healthcare supply chains and emphasising the urgent need for stricter regulation and enforcement (Interpol, 2021).

Technological advancements have also enabled counterfeiters to produce high-quality fake electronics and other technology products, such as smartphones and batteries, which pose safety risks and damage the reputations of legitimate brands. Intellectual property theft (IP) through counterfeiting remains a significant concern for many industries, including software and entertainment, where piracy and illegal downloads continue to undermine the creative economy (International Chamber of Commerce, 2022).

Economically, counterfeiting has a profound impact on global trade and commerce. The Organisation for Economic Co-operation and Development (OECD) estimates that counterfeit goods account for approximately $500 billion annually, representing around 2.5% of global trade (OECD, 2019). This results in substantial revenue losses for businesses and, by extension, significant job losses in sectors such as manufacturing and technology. Governments also suffer due to the loss of tax revenues from counterfeit goods sold in informal markets, which ultimately affects public funding and investment in essential services (OECD, 2021).

Counterfeit products, particularly in sectors like pharmaceuticals and automotive parts, present serious safety risks for consumers. These products often do not meet safety standards, leading to health hazards and accidents. Moreover, counterfeit goods in the market erode consumer trust in legitimate brands, causing long-term reputational damage even to companies not directly responsible for these counterfeit products (International Trademark Association, 2020).

The impact of counterfeiting on innovation is also significant. When companies face the threat of counterfeiting their products, they may be less inclined to invest in research and development (R&D), thereby stifling technological and industrial advancement (World Intellectual Property

Organization, 2019). This affects the companies and has broader implications for economic growth and technological progress.

In response to these challenges, governments and international organisations have strengthened regulatory frameworks and enforcement mechanisms. Measures such as enhanced customs cooperation, strict penalties for counterfeiters, and public awareness campaigns are being implemented to curb the spread of counterfeit goods (OECD, 2021). Technological solutions, including blockchain, Quick Response (QR) codes, and advanced authentication systems, are also being deployed to enhance the traceability and verification of products in supply chains (European Union Intellectual Property Office, 2020).

Public-private partnerships (PPPs) have emerged as a critical strategy in combating counterfeiting. These collaborations between governments, industry stakeholders, and non-governmental organizations facilitate the sharing of intelligence and resources, making it easier to tackle this global issue effectively (World Customs Organization, 2021). Consumer awareness initiatives are also essential in reducing the demand for counterfeit products. By educating consumers about the risks associated with fake goods, these campaigns empower them to make informed choices and reduce the appeal of counterfeit items (International Trademark Association, 2020).

1.1.2 Consumer Behavior and Counterfeit Goods

Counterfeit consumption of goods is classified into two main categories: *deceptiv*e and *nondeceptive* (Bian and Veloutsou, 2017; Samaddar & Menon, 2021). Products marketed to deceive the purchaser are known as deceptive counterfeit goods. In these circumstances, consumers are unaware they are purchasing illicit and counterfeit goods (Prendergast et al., 2002). Drugs and cosmetics are common examples of deceptive counterfeit goods. It is not possible to measure attitudes and mindsets toward the purchase of these counterfeit goods because the consumer is not aware of the deception (Bian & Moutinho, 2011). On the other hand, nondeceptive consumption occurs when consumers intentionally and knowingly purchase counterfeit goods (Bian and Veloutsou, 2017). As such, consumer behaviour towards counterfeit goods is a complex phenomenon influenced by various factors such as awareness, experiences and motives for purchasing a specific product on the market.

Consumer Awareness

Consumer awareness plays a critical role in the decision-making process regarding counterfeit goods. Awareness varies widely across demographics and regions, affecting consumers' ability to distinguish between genuine and counterfeit products. Studies indicate that consumers in developed markets tend to have higher levels of awareness regarding the risks and illegality associated with counterfeit goods. For example, a study by the European Union Intellectual Property Office EUIPO (2020) found that over 60% of consumers in the European Union were aware of the potential health and safety risks posed by counterfeit goods, particularly in sectors like pharmaceuticals and electronics. In contrast, awareness is often lower in developing regions, estimated to be at an average of 52%, where counterfeit products are more prevalent. In Kenya, for instance, a survey by the Anti-Counterfeit Authority (ACA, 2021) revealed that a significant portion of the population is unaware of the health risks associated with counterfeit pharmaceuticals and consumer goods. This lack of awareness is compounded by the limited enforcement of intellectual property rights, effective anti-counterfeit campaigns, and the widespread availability of counterfeit products in informal markets.

Consumer Experiences

Consumer experiences with counterfeit goods vary significantly and can influence their future purchasing decisions. The extant literature suggests that if a person's mindset and attitudes toward counterfeiting are favourable, it is highly likely that he or she will consider the purchase of a counterfeit product. For example, Nia and Lynne (2000) demonstrate that a person who owns no counterfeits and only original goods believes that counterfeits are inferior products and that ownership of original luxury products is more prestigious than counterfeit luxury goods. On the other hand, those who own more counterfeits have a positive image of them and do not believe these products are inferior: They also think that the value, satisfaction, and status of original luxury brand names were not decreased by the wide availability of counterfeits increasing the value of counterfeit trade. Thus, some consumers knowingly purchase counterfeit products due to economic constraints or the perception that they offer better value for money. For instance, in countries like China and India, counterfeit luxury goods are often purchased as affordable alternatives to expensive brands (OECD, 2019). The quality of these counterfeit products has improved over time, making them more appealing to consumers who might otherwise be deterred by their inferior quality.

In Kenya, experiences with counterfeit products are often negative, particularly in sectors such as automotive parts and pharmaceuticals. Consumers have reported poor performance, safety hazards, and health risks associated with these counterfeit products (ACA, 2021). Despite these negative experiences, the high price of genuine products often drives consumers back to counterfeit markets, compounding the effects counterfeiting in Kenya.

Consumer Motivations to Buying Counterfeits

The motivations behind purchasing counterfeit goods are diverse and can be categorized into three: economic, social and psychological factors.

(i) *Economic Motivations:* Economic factors are the primary driver for many consumers, especially in regions with lower income levels. The affordability of counterfeit goods makes them an attractive option for consumers who cannot afford genuine products. For instance, in Nigeria, the high cost of branded electronics and pharmaceuticals leads many consumers to opt for counterfeit alternatives despite being aware of the potential risks (OECD, 2019).

(ii) *Social and Cultural Motivations:* Social and cultural factors also influence consumer behavior. In some cases, counterfeit goods are purchased by the desire to project a certain social status without bearing the total cost of genuine luxury items. In countries like Thailand and Vietnam, where social status is highly valued, counterfeit luxury items are popular among middle-class consumers seeking to emulate wealthier peers (Interpol, 2021).

(iii) *Psychological Motivations:* Psychological factors, such as perceived value and risk-taking behavior, also play a role. Some consumers view the purchase of counterfeit goods as a way to "beat the system" or challenge high prices imposed by international brands. This behavior is particularly prevalent among young consumers in markets like Brazil and South Africa, where counterfeiting is sometimes seen as a form of rebellion against economic disparities (OECD, 2019).

1.1.2 Socio-economic effects of counterfeiting on Consumers

The effect of counterfeiting on society and the economy is significant, with far-reaching consequences to consumers. These effects manifest in various ways, from economic losses and health risks to broader social implications. On a global scale, counterfeiting poses a substantial economic threat. The Organisation for Economic Co-operation and Development (OECD) estimates that counterfeit goods account for approximately $500 billion annually, representing around 2.5% of global trade (OECD, 2019). This extensive illicit market undermines legitimate businesses by diverting sales, reducing revenues, and leading to job losses. As a result, companies are disincentivised from investing in innovation and product development. For consumers, counterfeit products often mean reduced quality and durability, ultimately increasing costs as they frequently need to replace or repair these defective items. In regions such as the United States and Europe, counterfeit electronics and luxury goods dominate the market, leading to significant economic losses for both consumers and legitimate companies (EUIPO, 2020).

In the local context of Kenya, the economic ramifications of counterfeiting are similarly severe. According to the Anti-Counterfeit Authority (ACA), the country loses over Ksh 100 billion annually due to counterfeit goods, which directly translates into job losses and reduced government revenue from taxes (ACA, 2021). The widespread availability of counterfeit pharmaceuticals and electronics in the Kenyan market is particularly problematic for consumers. The use of counterfeit medications can result in ineffective treatment, prolonged illness, or even death, significantly increasing healthcare costs and undermining public health efforts. Similarly, counterfeit electronics often malfunction, posing safety risks and financial burdens for households that need to replace faulty products.

The social outcomes of counterfeiting are equally concerning, particularly regarding consumer health and safety. Globally, counterfeit pharmaceuticals are a major issue, especially in developing countries where regulatory oversight may be less stringent. The World Health Organization (WHO) estimates that one in ten medical products in low- and middle-income countries is either substandard or falsified, leading to severe health consequences, including treatment failure and death (WHO, 2020). A stark example of this occurred in Nigeria in 2013, when a batch of counterfeit antimalarial drugs resulted in numerous fatalities, underscoring the deadly risks associated with counterfeit medications (WHO, 2014).

In Kenya, the prevalence of counterfeit pharmaceuticals remains a critical issue. The ACA has documented numerous cases where consumers have suffered adverse health effects from using counterfeit medications, particularly antimalarials and antibiotics (ACA, 2021). Moreover, counterfeit automotive parts, which are commonly sold in the local market, pose significant safety risks. Defective parts can lead to vehicle malfunctions and accidents, endangering lives and contributing to road safety issues. These incidents highlight the direct threat counterfeit products pose to consumer safety and the broader societal costs associated with their proliferation. Counterfeiting also undermines consumer trust in brands and market institutions. Globally, consumers who unknowingly purchase counterfeit products may lose confidence not only in the affected brands but also in the market systems and regulatory frameworks that are supposed to protect them. For example, in China, the widespread availability of counterfeit baby formula in the early 2000s led to a public outcry and a significant loss of trust in local brands, pushing many consumers to seek imported products despite their higher cost (OECD, 2019).

In Kenya, the pervasive presence of counterfeit goods has eroded trust in local businesses and the government's ability to regulate markets effectively. Many consumers prefer imported goods over local products due to concerns about authenticity and quality, which undermines local industries and perpetuates the cycle of counterfeiting (ACA, 2021). This erosion of trust poses a significant challenge for developing economies like Kenya, where local production and consumption are crucial for economic growth and development.

The economic and social consequences of counterfeiting also lead to shifts in consumer behaviour. Affected by negative experiences and health risks, consumers often become more cautious and sceptical, which can reduce their willingness to purchase products from specific markets or brands. This shift in behaviour further destabilizes economies, especially in developing countries where counterfeiting is widespread and regulatory measures are less effective.

1.2 Objectives of the Consumer–level Survey

The overarching objective of carrying out the consumer-level survey of counterfeiting in Kenyan markets was to determine the extent of counterfeiting and the level of awareness by consumers about counterfeit products on the market. The specific objectives of the consumer-level survey were to:

(i) Establish consumer awareness level on counterfeiting in Kenya.
(ii) Establish consumer experience in buying counterfeit goods on physical and online markets.
(iii) Establish consumer change of mindset against counterfeiting
(iv) Determine effective anti-counterfeit campaign strategies and counterfeit cases reporting.
(v) Identify solutions to challenges faced by consumers on counterfeiting matters.

1.3 Scope of Work

The survey covered eight (8) selected counties i.e., Nairobi, Mombasa, Kisumu, Nakuru, Busia, Machakos, Garissa and Nyeri. A total of 2185 consumers were interviewed covering the following consumer strata:

(a) Corporate offices such as banks and insurance offices
(b) Hospitability industry (hotels, clubs and pubs)
(c) Institutions of learning (schools, colleges and universities)
(d) Beauty and grooming industry (salons, barbershops and spas)
(e) Health facilities (hospitals, clinics and pharmacies)
(f) Farmers (crops and animal husbandry products)
(g) Entertainment (music and art)
(h) Manufacturing industries (SMEs and well-established industries)
(i) Supermarkets
(j) Open-air garages
(k) Bookshops

CHAPTER TWO: METHODOLOGY

2.1 Research design

The survey utilised a mixed-methods research design, integrating quantitative and qualitative information. This approach was beneficial as it facilitated the collection of broad statistical trends alongside in-depth insights, enhancing the robustness and validity of the findings. Quantitative data provided measurable evidence of the prevalence, consumer awareness levels and impact of counterfeiting, while qualitative data offered detailed explanations and contextual understanding. This combination allowed for a comprehensive analysis of counterfeiting in Kenya.

2.2 Sampling methods and sample size determination.

The survey targeted eight (8) counties that were purposively selected. Six (6) of these counties—Mombasa, Nairobi, Nakuru, Nyeri, Machakos and Kisumu—were identified as counterfeit hotspots during the baseline survey in 2020. Additionally, two counties, Garissa and Busia, were included to represent the remaining regions of the country. The study used the Cochran (1977) formula to determine the sample size, as this formula is particularly suitable for studies involving large samples when the proportion of an attribute is known.

$$n_0 = \frac{z^2.p.q}{e^2} = \frac{1.96^2x0.65x0.35}{0.02^2} = 2{,}185$$

Where n_0 is the sample size, Z is the Z-value (the number of standard deviations a data point is from the mean) corresponding to the desired confidence level (in this case, we use 1.96 for a 95% confidence level), p is the estimated proportion of an attribute that is present in the population (we use the 2020 survey result that revealed the level of public awareness on matters of counterfeiting in Kenya stands at 65.48% as at June 2021), $q = 1 - p$ (the proportion of the population without the attribute), and e is the desired level of precision or the margin of error which is taken to be 2%.

The survey sought a representative sample of adults from the selected eight (8) counties across eleven (11) consumer strata. Consequently, the resultant sample of 2,185 individuals were proportionately distributed across the eight (8) selected counties and respective high-density (urban) areas using the power allocation method based on 2019 census data. Further, the sample per urban area/sub-county were spread evenly over the eleven (11) consumer strata in equal proportions. However, areas with less than ten sampled individuals were vacated, and the respondents distributed to the other areas within the county. Additionally, the survey extends beyond the selected urban area to reach the farmers' stratum respondents.

2.3 Data Collection Methods

The data was collected using Computer-Assisted Personal Interviews (CAPI) through the Kobo Toolbox. Trained interviewers used tablets or smartphones to administer the survey questions in person, allowing for direct interaction between interviewers and respondents. This method ensured clarity and provided immediate clarification of any queries. The use of digital devices significantly enhanced data accuracy and integrity by reducing manual entry errors and facilitating real-time data collection and monitoring. Collected data was transmitted instantly and made accessible to both the KCA University and ACA teams. The consumer-level survey instrument was modelled after the WIPO Consumer Survey Toolkit to ensure standardized measures for inter-territorial comparisons. The text format of the survey instrument is included in Appendix I.

2.4 Piloting of Instruments

The piloting phase is a critical component of the research, designed to test and refine the data collection tools and methodologies before full-scale implementation. During this phase, 10% of the representative sample were selected to participate in the pilot study, allowing the research team to identify and address any issues with the survey instruments, interview guides, and data collection processes. Training of enumerators was also conducted to ensure they are well-prepared to administer the tools accurately and consistently. Feedback from the pilot study was used to make necessary adjustments, ensuring the reliability and validity of the data collection methods. The results of the piloting phase were presented in a validation workshop, where the Anti-Counterfeit Authority (ACA), reviewed and approve the finalized tools and protocols, setting the stage for successful data collection in the subsequent phases of the project.

2.5 Data analysis techniques.

Data was processed and analyzed using R Programming. R is selected for its robust data handling and comprehensive analysis capabilities, ensuring accurate and reliable processing of large datasets. The quantitative analysis summarisedthe data using descriptive statistics, providing a clear overview through mean, median, mode, standard deviation, and frequency distributions. This approach offers insights into central tendencies and variability within the data. For the qualitative analysis, thematic analysis was used to identify patterns within the data, offering insights into attitudes, experiences, and challenges related to counterfeit trade. This involves coding the data to categorize key themes and interpreting these themes in the context of research objectives. Thematic analysis uncovers complex insights that quantitative methods cannot capture, providing a nuanced understanding of social and contextual factors. This method offers a comprehensive perspective on issues related to counterfeit trade, informing effective strategies and interventions.

CHAPTER THREE: SURVEY FINDINGS

3.1 Demographic Information

3.1.1 County of Residence

The consumer-level survey covered eight regions in Kenya, each playing a crucial role in understanding the prevalence of counterfeiting. The highest representation was from Nairobi, which accounted for 34.9% of the sample, highlighting its status as a major commercial hub where counterfeit goods are likely prevalent. Nakuru (16.6%) and Machakos (11.2%) are emerging urban centres heavily exposed to counterfeit items due to their proximity to larger cities. As a major port city, Mombasa (9.32%) is a potential entry point for counterfeit products into the country. Kisumu (8.83%) serves as a commercial centre in western Kenya, while Busia (6.82%) and Garissa (6.56%) are border towns where cross-border counterfeit trafficking is possible. Nyeri, with 5.75% representation, offers insights into counterfeiting activities in less urbanized and rural regions. These areas provide a comprehensive perspective of counterfeit product patterns across various consumer segments in Kenya.

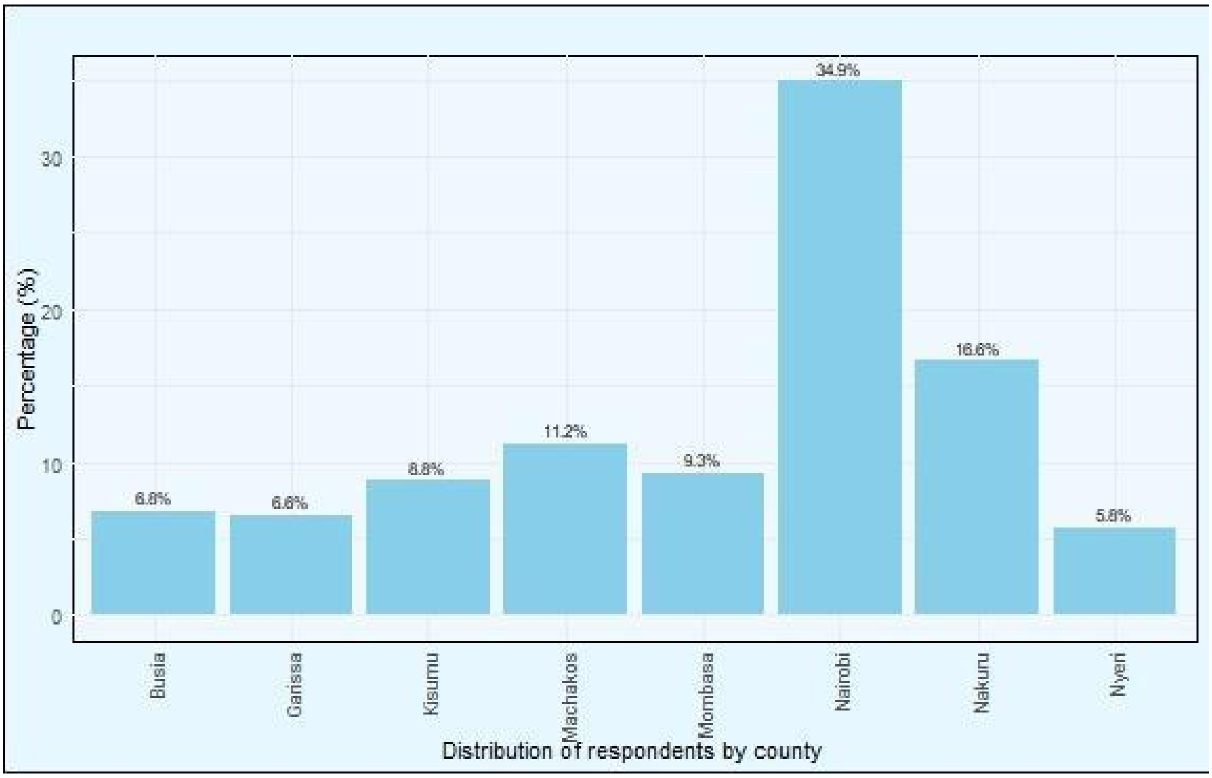

Figure 1: Distribution of respondents by county

3.1.2 Consumer Stratum

The survey categorised respondents into 11 distinct consumer strata, yielding a mean representation of 9.07% across these groups. The hospitality sector had the largest representation at 11.9%, followed by health facilities (10.5%) and beauty establishments

(10.4%), indicating significant exposure to counterfeit goods in these areas. The manufacturing sector (9.46%) and open-air garages (9.37%) also featured prominently, especially in industrial and automotive sectors, susceptible to counterfeiting. Educational institutions (9.01%) and supermarkets (8.12%) emerged as crucial consumer interaction points. Entertainment (8.21%) and corporate offices (7.94%) highlight awareness of counterfeiting in the creative and business sectors, while farmers (7.94%) and bookshops (7.18%) show that counterfeiting also affects agricultural and educational sectors. These distributions provide a comprehensive view of how counterfeiting impacts different consumer groups in Kenya.

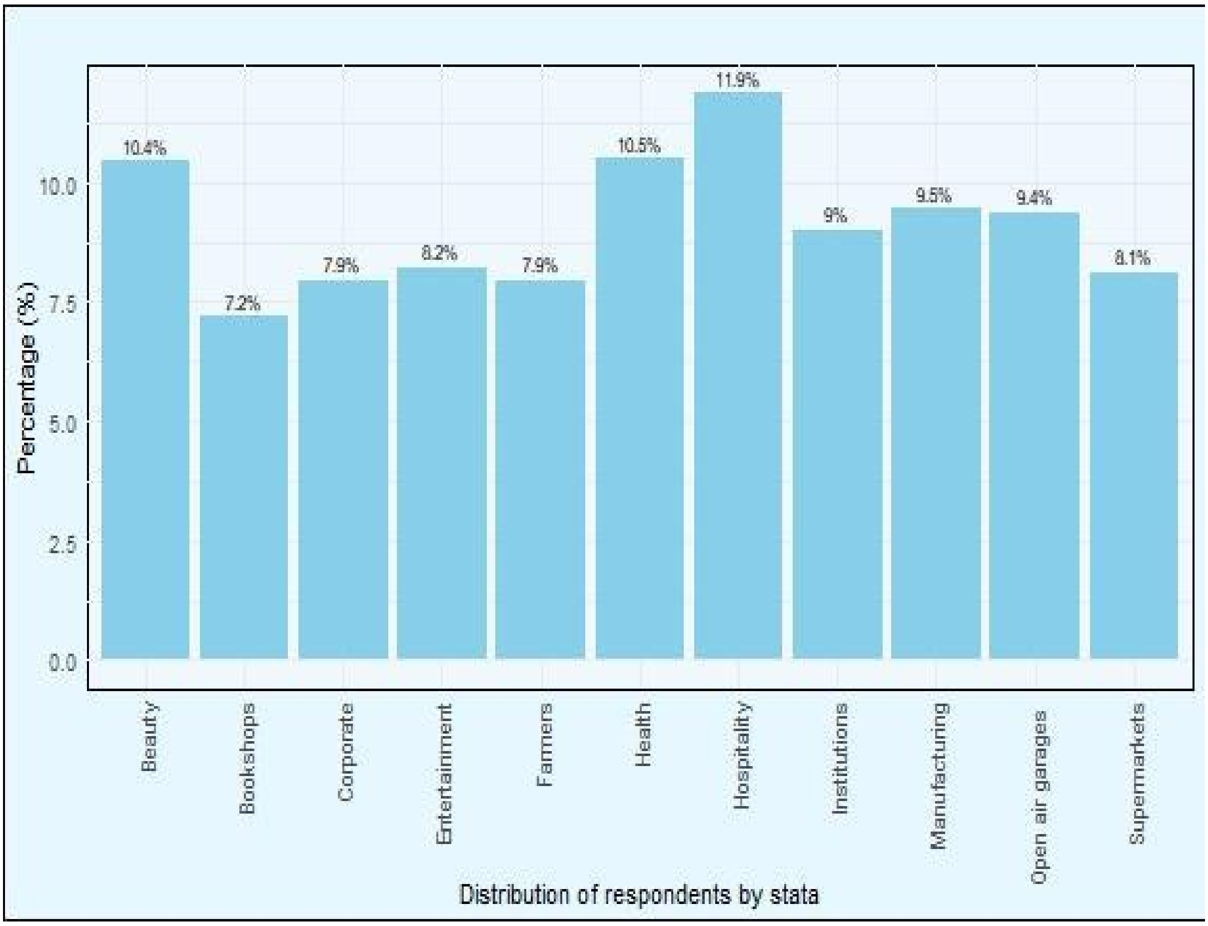

Figure 2: Distribution of respondents by Stratum

3.1.3 Age of Respondent

The survey covered ten age groups, with a mean of 9.07%. The largest representation came from the 25-29 age group (27.3%), followed by the 30-34 group (22.7%). The 35-39 group comprised 16.3%, while the 18-24 group comprised 13.2%. Respondents aged 40-44 represented 10.2%, with a decline in older age brackets. Notably, respondents aged 70 and above constituted only 0.134% of the sample. These results suggest that younger and middle-aged individuals are more engaged in the survey, offering insights into their awareness and experiences regarding counterfeit products in Kenya.

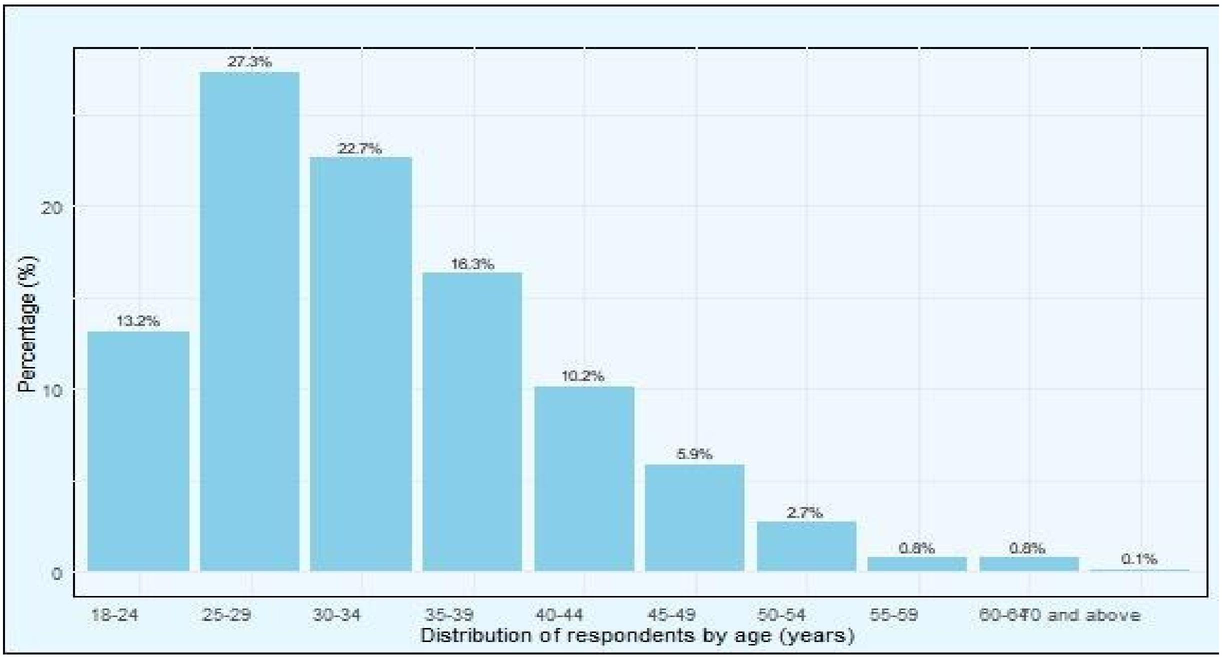

Figure 3: Distribution of respondent by age

3.1.3 Education

The survey captured various educational levels among respondents. 33.5% held a diploma or certificate, making up the largest group. Secondary school graduates followed at 27.8%, providing insights into how counterfeiting affects skilled and semi-skilled workers, who constitute a significant portion of Kenya's workforce. Respondents with undergraduate degrees represented 24.9%, offering perspectives on how educated professionals perceive counterfeit goods. Postgraduate degree holders (8.34%) contributed valuable insights, which may be instrumental in policy formulation. Those with primary education (4.68%) and those without formal education (0.803%) represent more vulnerable groups, often lacking the resources or awareness to identify counterfeit products.

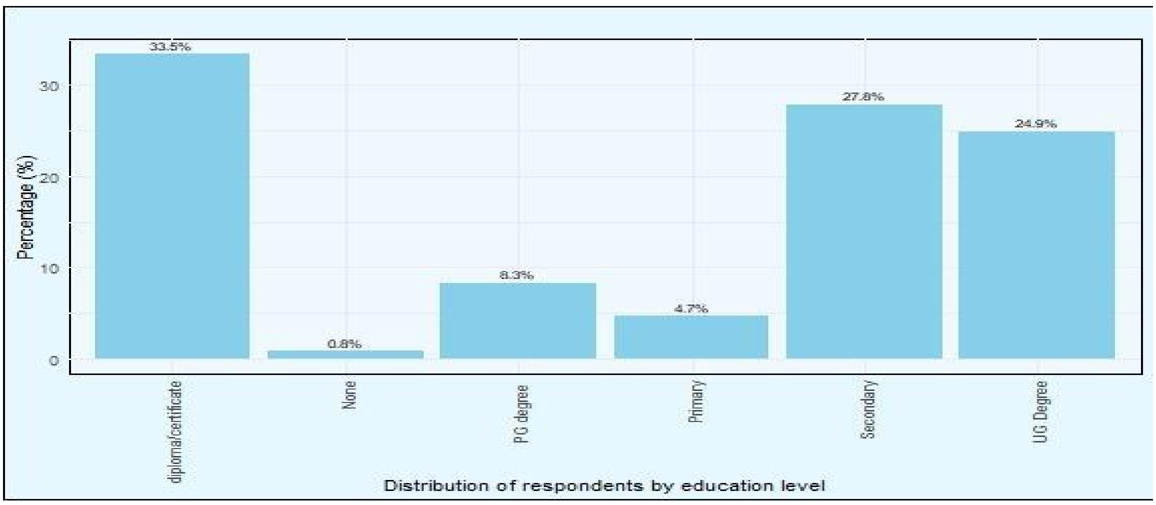

Figure 4: Distribution of respondents by education level

3.1.4 Sex of Respondent

The survey results showed that 55.1% of respondents were male, while 44.9% were female. This gender distribution provides a balanced understanding of counterfeiting's impact on both men and women. The substantial representation of women offers valuable insights into counterfeit trends, though the higher proportion of male respondents may reflect more significant exposure to counterfeit goods in sectors traditionally associated with male employment.

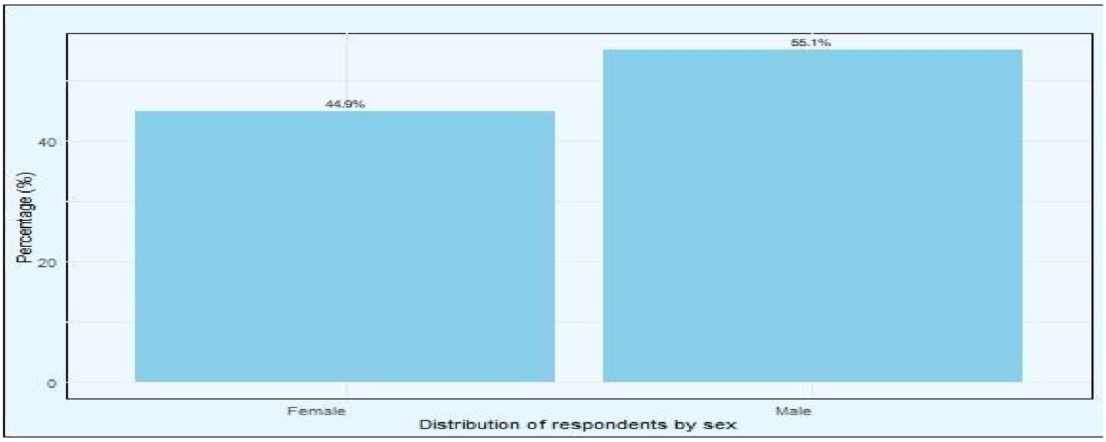

Figure 5: Distribution of respondents by sex

3.1.5 Employment Status

The survey revealed a diverse employment landscape. 41.2% of respondents had full-time jobs, while 33.9% were self-employed. Students accounted for 15.6%, and part-time workers made up 3.48%. Only 1.07% were retired, and 0.36% chose "other." This range of employment statuses highlights how varying employment conditions impact experiences and perceptions of counterfeit goods, emphasizing the need to address this diversity when developing anti-counterfeiting strategies.

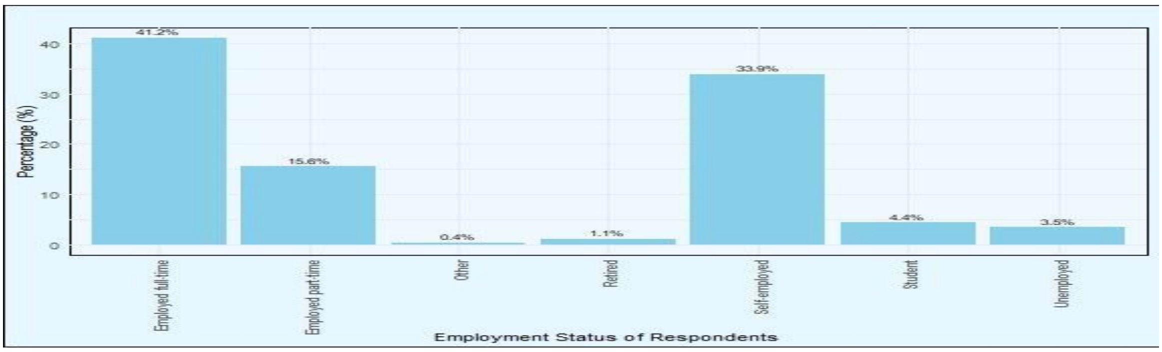

Figure 6: Employment status of respondents

3.2 Consumer Awareness Levels on Counterfeit Goods

3.2.1 National and Regional Consumer Awareness Levels

The study revealed that consumers' awareness of counterfeit goods at the national level was approximately 83.85%. Most respondents had encountered counterfeit products in their localities. This awareness is crucial for shaping public policy and strengthening anti-counterfeiting initiatives. However, the data also showed significant regional variations. Busia reported the highest awareness at 98.0%, followed by Machakos (90.8%) and Nairobi (88.9%). In contrast, Garissa and Mombasa recorded lower awareness levels at 66.7% and 63.6%, respectively. These findings highlight the need for targeted educational campaigns to close knowledge gaps and promote consumer vigilance in regions with low awareness. The findings also highlight the impact of direct cross-border trade and counterfeiting, as suggested by Busia County.

	National level	
Have you heard about or seen counterfeit products being sold in your area?	**Count**	**Percentage (%)**
No	362	16.1463
Yes	1880	83.8537

Figure 7: Consumer Awareness Levels on Counterfeit Goods

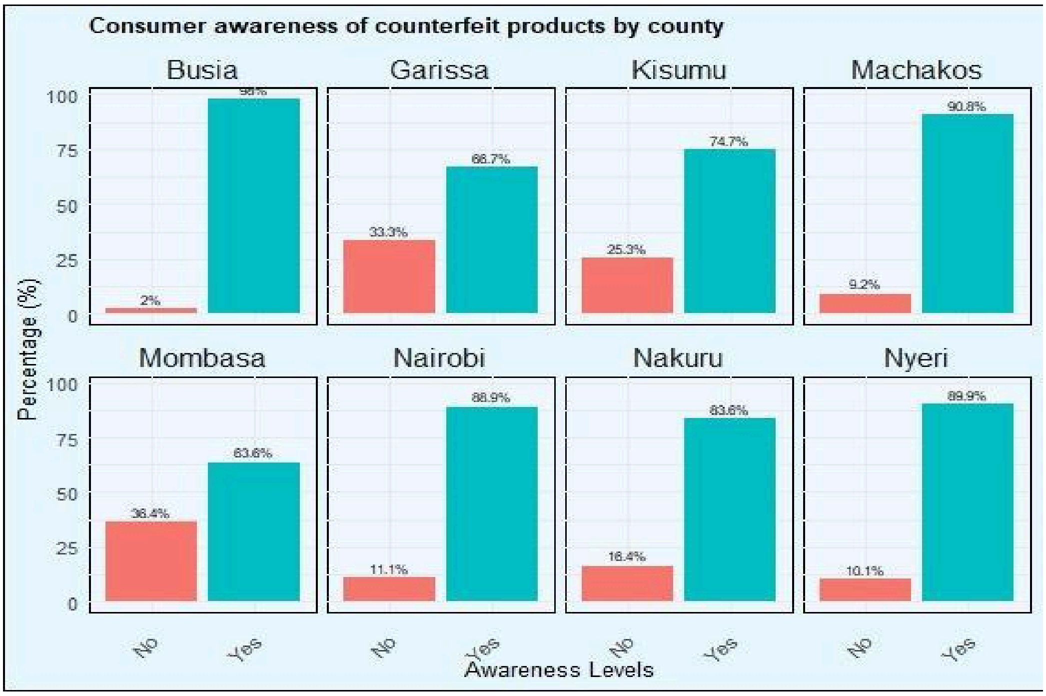

Figure 8: Consumer awareness of counterfeit products by county

3.2.2 Frequency of Encountering Counterfeit Goods

A total of 33.18% of respondents reported encountering counterfeit goods at low levels, reflecting general awareness. However, 38.94% encountered counterfeit products moderately, indicating a notable market presence. A significant 28.89% reported high levels of encounters, with 19.63% encountering counterfeits frequently and 9.26% reporting consistent encounters. County-level data revealed considerable variation in encounter frequency, with urban centers like Nairobi experiencing more frequent encounters, while Garissa reported a lower prevalence. These findings emphasize the need for sustained public awareness campaigns and regulatory measures to mitigate the impact of counterfeit goods.

	National level summary	
How often do you encounter counterfeit goods/products in the market?	**Count**	**Percentage (%)**
Never	76	4.04
Rarely	529	28.14
Sometimes	732	38.94
Often	369	19.63
Always	174	9.26

Figure 9: Frequency of Encountering Counterfeit Goods

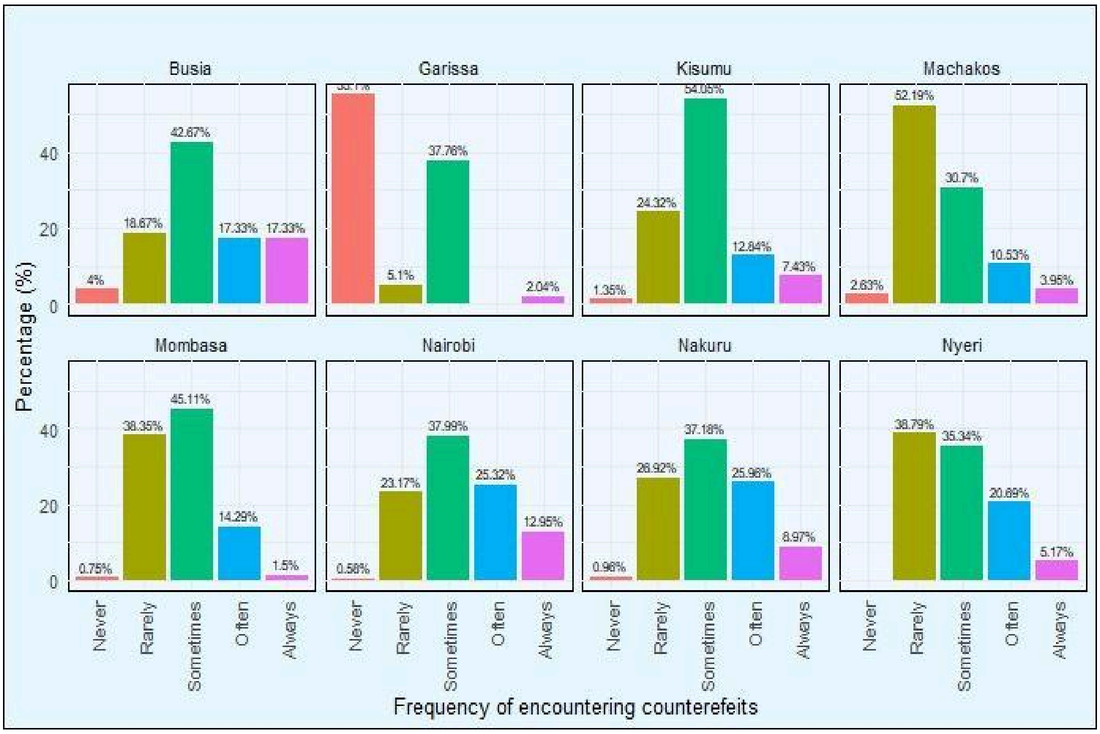

Figure 10: Frequency of encountering counterfeits

3.2.3 Sector-Specific Awareness of Counterfeit Products

The study revealed significant sectoral differences in counterfeit awareness. The agricultural inputs and agrochemicals sector had the highest awareness, with 39.52% of respondents indicating familiarity with counterfeit products. Alcoholic drinks (36.57%) and cosmetics (33.99%) also showed high levels of awareness. In contrast, the automotive (8.97%) and textile and apparel (7.63%) sectors had lower levels of consumer awareness. These findings suggest that targeted educational campaigns and stricter regulations are necessary in these sectors to improve awareness and protect consumers.

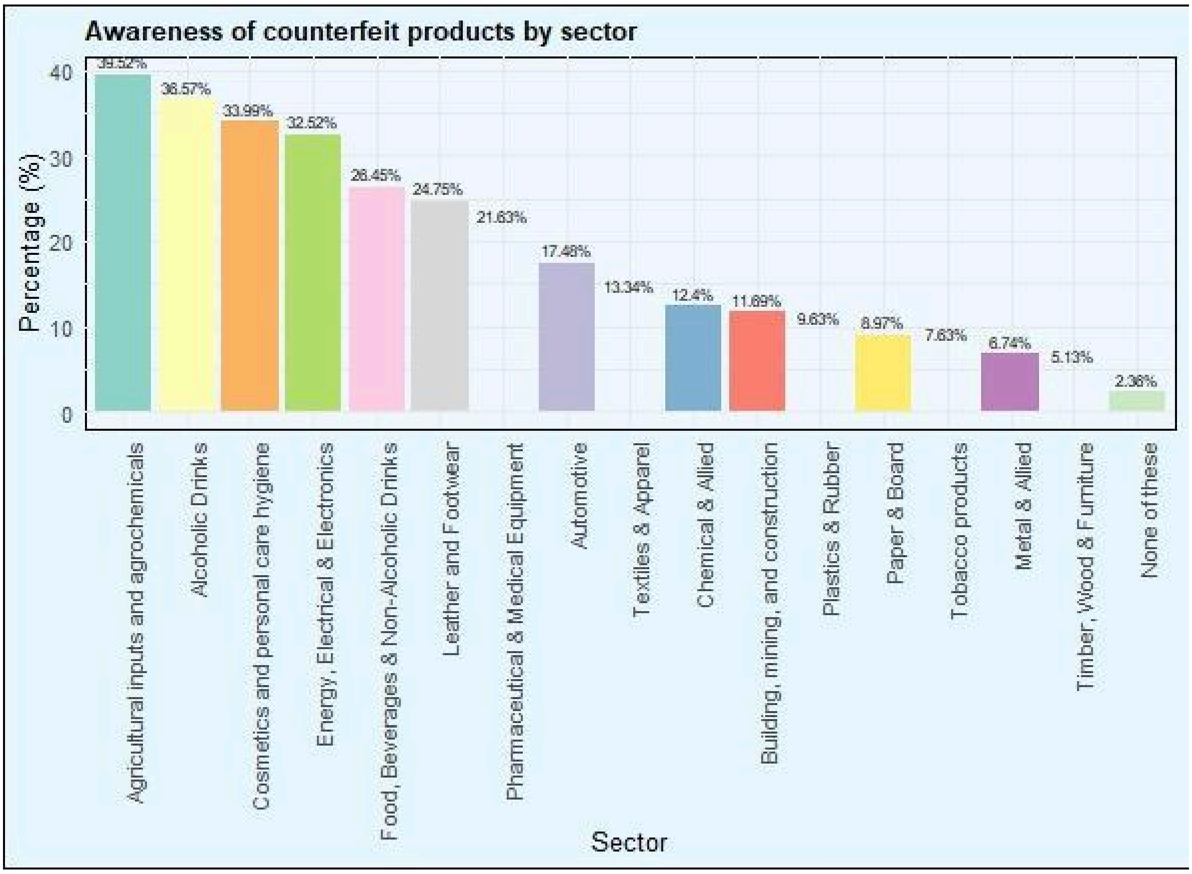

Figure 11: Awareness of Counterfeit Products by sector

3.2.4 Most Counterfeited Goods in the Agricultural Sector

The agricultural sector faces significant counterfeit challenges. 89.16% of respondents identified pesticides, insecticides, and herbicides as the most counterfeited products, followed by fertilizers (54.29%) and animal feeds (45.60%). Other affected categories include seeds (34.09%) and agricultural equipment (13.66%). The prevalence of counterfeit agrochemicals threatens food security and the livelihoods of farmers. Strengthened regulations, increased penalties, and public awareness campaigns are necessary to mitigate the impact of counterfeiting in this critical sector.

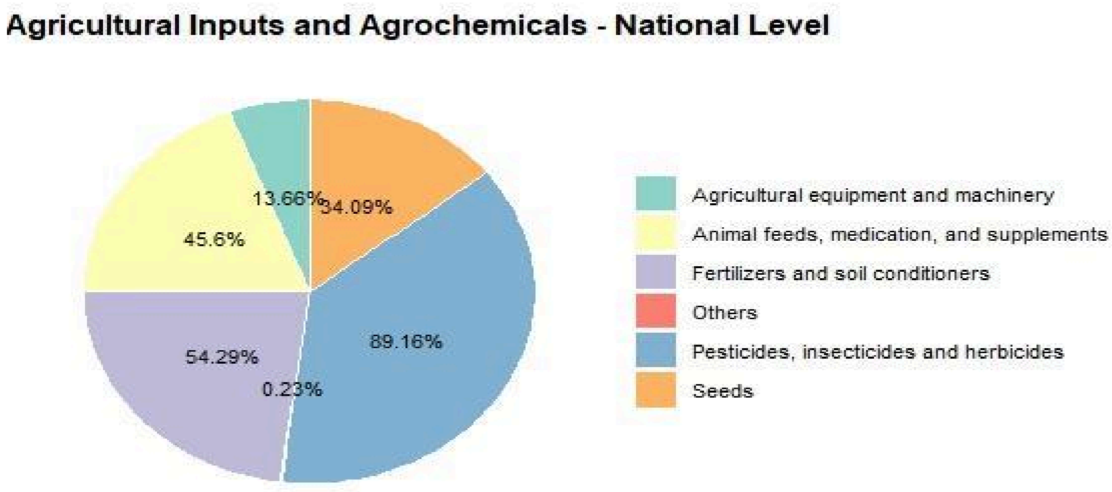

Figure 12: Agricultural inputs and agrochemicals

3.2.5 Most Counterfeited Goods in Automotive Sector

The survey results reveal a significant prevalence of counterfeiting in Kenya's automotive sector, particularly affecting four-wheeler spare parts and accessories. 81.89% of respondents identified these products as the most counterfeited. Maintenance products were also widely reported, with 67.35% of respondents highlighting issues. Customization products and motorcycle parts were noted by 43.88% and 33.93%, respectively. Other automotive products were minimally affected, with only 1.53% reporting concerns.

These findings indicate a widespread issue of counterfeit automotive parts, particularly in areas critical to vehicle maintenance and safety. The prevalence of counterfeit four-wheeler parts presents serious risks to road safety and vehicle reliability. To mitigate these risks, there is an urgent need for stronger regulations on the importation and distribution of automotive parts. Public awareness campaigns are also essential to educate consumers and retailers on how to identify genuine products. Collaborative efforts between vehicle manufacturers, government agencies, and retailers, along with stricter enforcement of penalties for counterfeiters, can reduce the prevalence of counterfeit products and enhance road safety in the country.

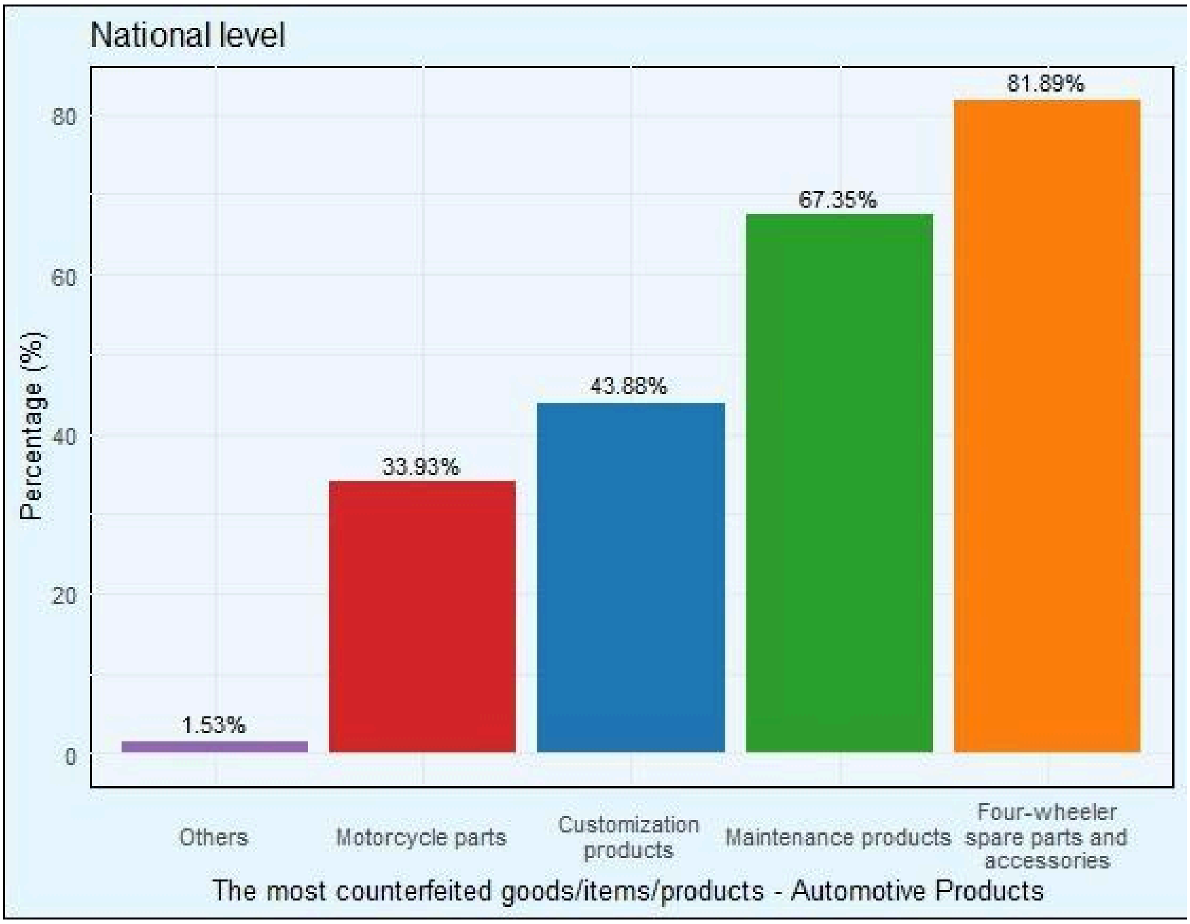

Figure 13:Most counterfeited goods/items/products -automotive products

3.2.6 Most Counterfeited Goods in Building and Construction Sector

The survey also revealed significant awareness of counterfeiting in the building and construction sector. A large majority of respondents (76.72%) reported encountering counterfeit cement, concrete paving blocks, clay roofing tiles, and other cement-manufactured products. Issues with steel and iron sheets, ballast, quarry machine-cut stones, and PPC/CPVC/PP pipes were also prominent. Only 1.53% of respondents raised concerns about unspecified products, indicating that counterfeiting primarily affects commonly used construction materials.

The presence of counterfeit construction materials not only undermines legitimate businesses, leading to financial losses and reduced market trust, but it also poses serious safety risks. Counterfeit products can compromise the structural integrity of buildings and infrastructure, leading to potential hazards for occupants. To address this issue, stronger enforcement mechanisms and regulatory frameworks are needed. The findings also point to a gap in consumer education, suggesting a need for comprehensive policies that focus on raising awareness, improving market surveillance, and imposing stricter penalties on counterfeiters. Effective policy formulation should involve collaboration between government agencies, industry stakeholders, and consumers to create a robust system for monitoring and reporting counterfeit construction products.

Most counterfeited products in the construction industry

Category	Count	Percentage (%)
Cement, concrete paving blocks, clay roofing tiles, cement manufactured products	201	76.72
Steel, iron sheets, etc	156	59.54
Ballast, quarry machine-cut stones	116	44.27
PPC/CPVC/PP pipes	70	26.72
Others (specify)	4	1.53

Figure 14:Most counterfeited products in the construction industry

3.2.7 Most Counterfeited Goods in Chemical and Allied Sector

Counterfeiting in the chemical and allied sector presents significant risks to consumer safety and industry integrity. The survey revealed that paints and resins are the most counterfeited products, with 64.39% of respondents identifying them. Foam mattresses (49.28%), adhesives and sealants (45.68%), and industrial cleaning agents (44.96%) also showed high levels of counterfeiting. Additionally, air fresheners (36.69%), water treatment chemicals (31.65%), and other miscellaneous items (3.24%) were reported.

The widespread counterfeiting of essential products like paints, cleaning agents, and water treatment chemicals poses severe risks to consumer health, economic growth, and environmental sustainability. Counterfeit products in this sector often contain harmful substances, leading to health complications and potential legal repercussions for consumers using unregistered or unauthorized chemicals. Furthermore, counterfeit chemicals that fail to meet regulatory standards may contribute to environmental degradation. To address these issues, policy formulation should focus on strengthening regulations, increasing consumer education, and promoting collaboration between government agencies, manufacturers, and retailers. A robust reporting mechanism is also essential to help consumers and businesses combat counterfeit goods in this sector.

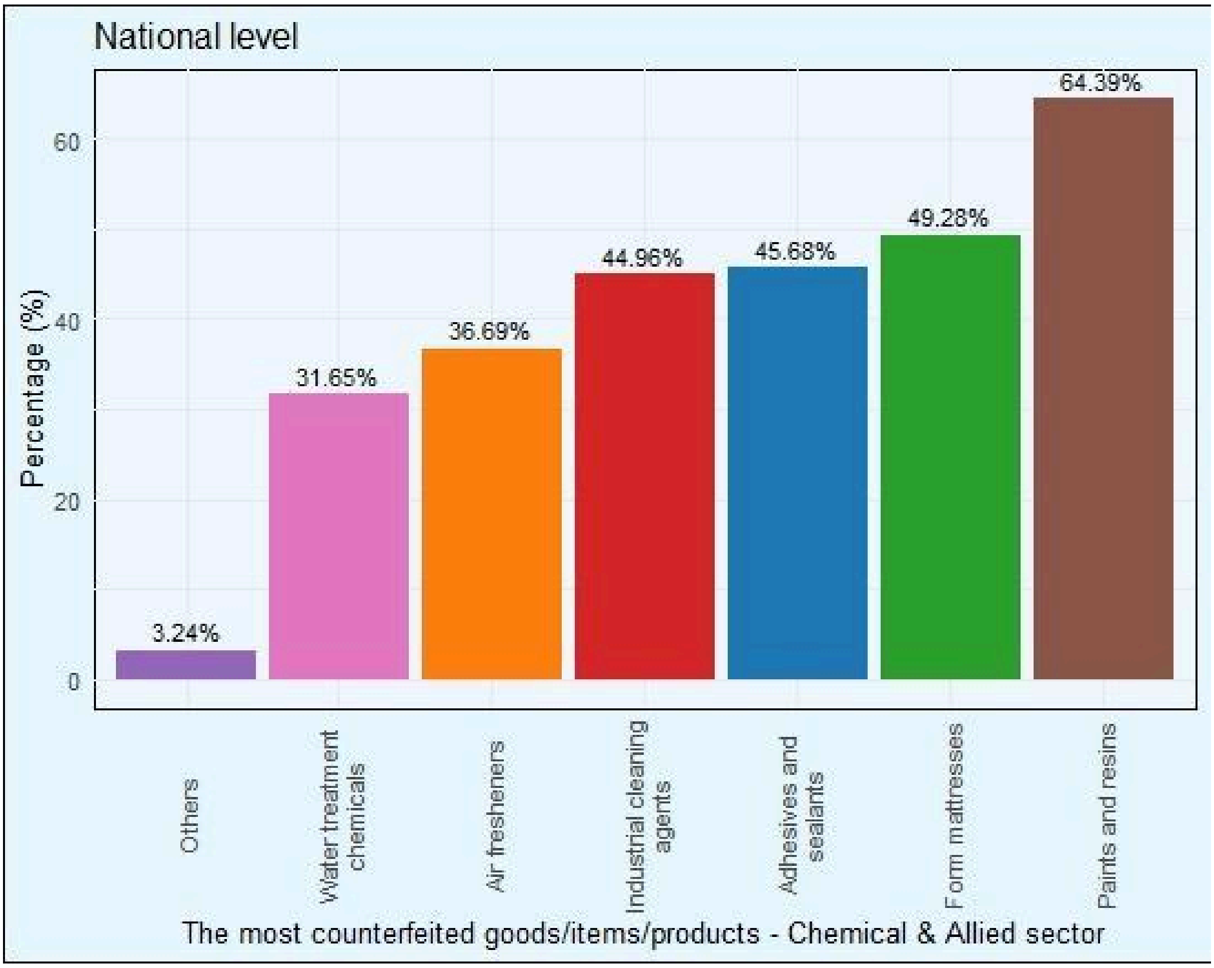

Figure 15:Counterfeited goods in Chemical and Allied Sector

3.2.8 Most Counterfeited Goods in Energy, Electrical, and Electronics Sector

The Energy, Electrical, and Electronics sector faces significant counterfeiting challenges, posing serious risks to both consumer safety and market integrity. The most counterfeited products in this sector are petroleum products, with 76.68% of respondents identifying them. These counterfeit products pose risks of engine damage and environmental hazards. Energy generators and solar panels are also commonly counterfeited, leading to potential failures in power generation.

Electric cables and wires were highlighted by 29.08% of respondents, raising serious concerns about safety risks such as electrical fires. Consumer electronics, including smartphones and laptops, had a 27.02% counterfeiting rate, while home appliances (22.22%) and smart home devices (21.40%) were also noted. Counterfeit batteries, which pose risks of overheating and explosions, were reported by 18.66% of respondents.

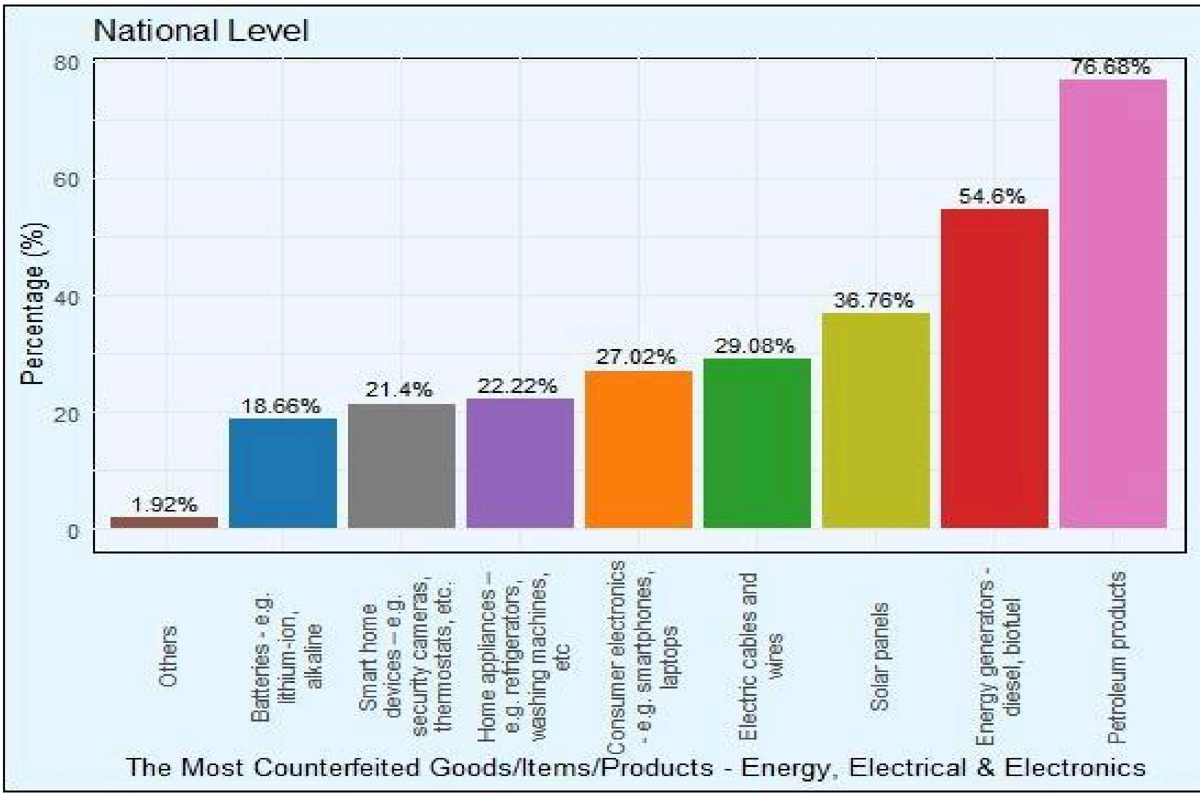

Figure 16: Counterfeited goods in Energy, Electrical, and Electronics Sector

3.2.9 Most Counterfeited Goods in Food, Beverages & Non-Alcoholic Drinks Sector

The survey results highlight significant consumer safety concerns and market integrity issues in the Food, Beverages, and Non-Alcoholic Drinks sector. Non-alcoholic beverages, including popular drinks such as fruit-based beverages and carbonated soft drinks, account for a staggering 75.89% of counterfeited items, posing serious health risks to consumers. Baked products and processed cereals follow at 47.39%, indicating vulnerabilities in essential food staples like bread and baby food. Snack foods and confectionery make up 38.11% of counterfeits, while milk and milk products (36.42%) and meat and fish products (36.09%) also reflect concerning rates of counterfeiting, particularly affecting vulnerable populations. Though edible oils, salts, and other items present lower percentages, they still pose potential risks. The high counterfeiting rates in this sector demand urgent action from policymakers and industry stakeholders. Stricter regulations, improved market monitoring, and enhanced consumer awareness bare necessary to protect public health and maintain confidence in food safety standards.

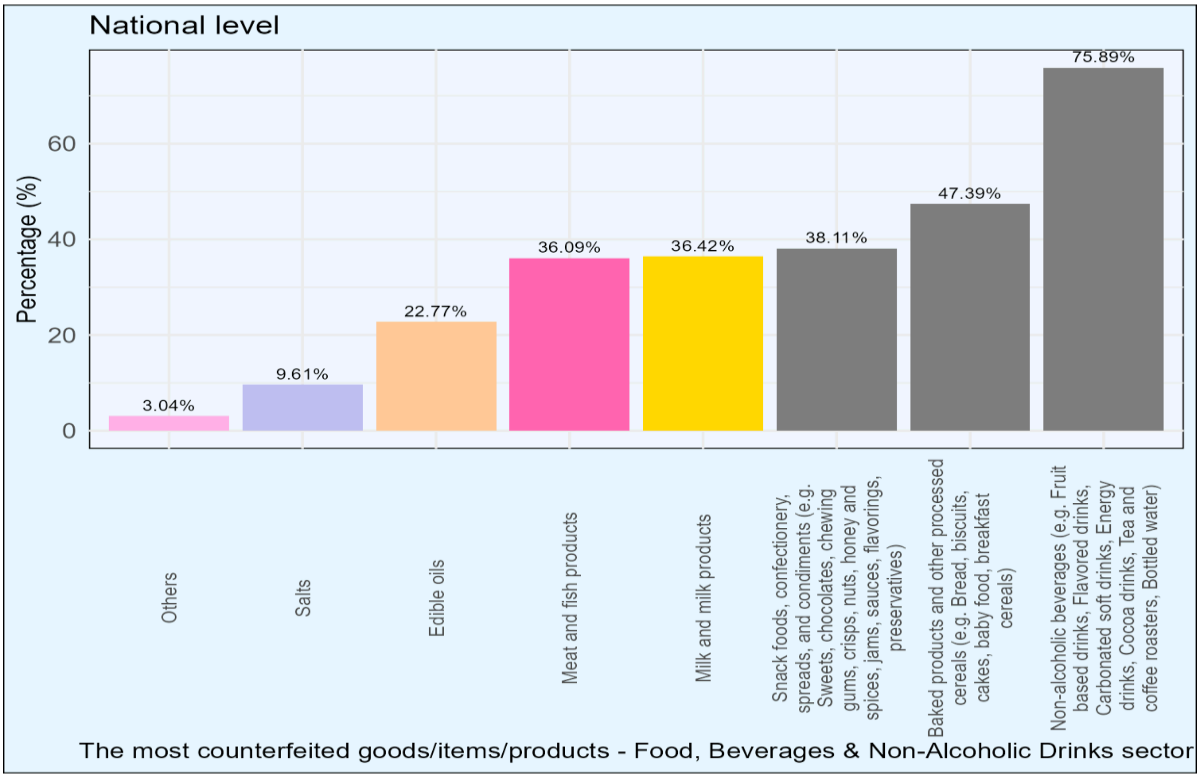

Figure 17: Counterfeited goods in Food, Beverages & Non-Alcoholic Drinks Sector

3.2.10 Most Counterfeited Goods in Alcoholic Drinks Sector

The Alcoholic Drinks sector faces significant counterfeiting challenges, posing risks to both consumer safety and market integrity. Wine is the most counterfeited product, accounting for 50.12% of total instances, followed by beer at 47.44%. Other notable beverages include whiskey (42.68%) and vodka (36.95%), highlighting the prevalence of counterfeit alternatives that pose health hazards. Products like rum (32.44%) and tequila (28.41%) also show considerable counterfeiting rates. While gin (23.05%), brandy (19.27%), and liqueurs (11.71%) are less frequently counterfeited, the presence of craft spirits (11.22%) reveals vulnerabilities within niche markets.

These high rates of counterfeiting threaten not only consumer safety but also legitimate businesses, emphasizing the need for stronger regulatory measures, heightened consumer awareness, and collaboration among stakeholders to combat counterfeiting in the alcoholic beverages market

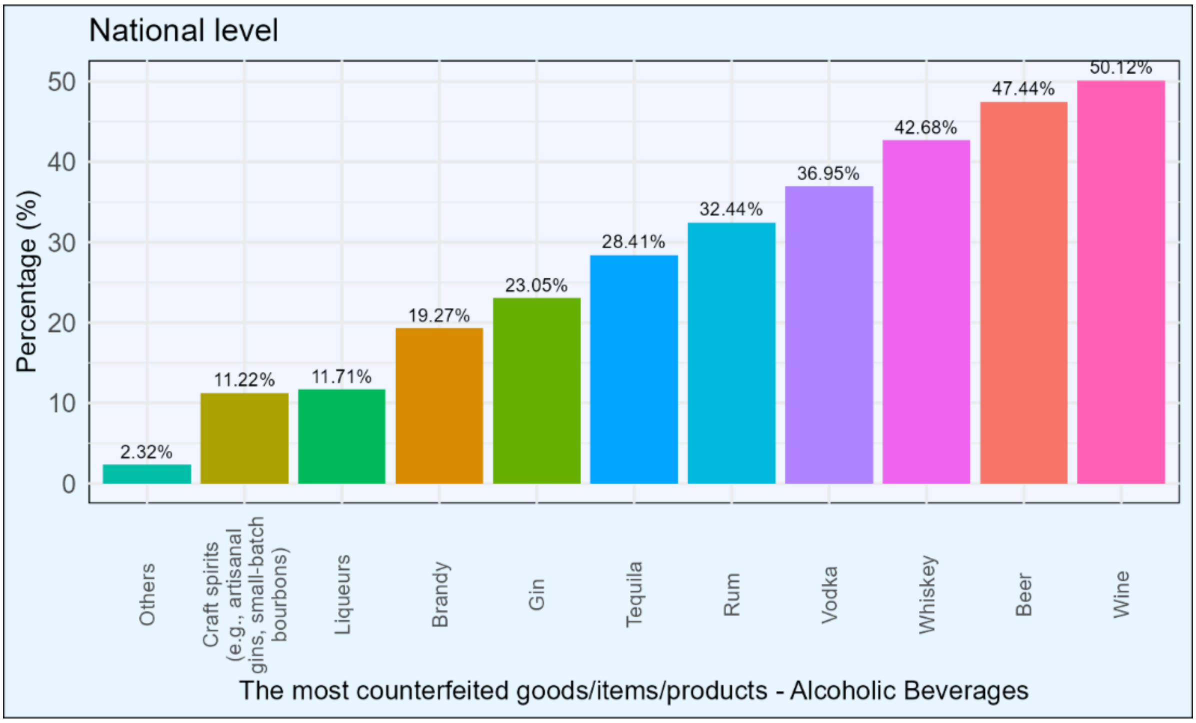

Figure 18: Counterfeited goods in Alcoholic Drinks Sector

3.2.11 Most Counterfeited Goods in Metal & Allied Sector

The Metal and Allied sector shows notable vulnerabilities to counterfeiting. The highest reported percentage of counterfeiting is in smelting and hot rolling products, such as reinforcement bars and flat bars, which accounted for 65.56% of responses. Cold rolling products, particularly those involving sheet colour coating, followed closely at 60.26%. Similarly, wire product converters (including nails, bolts, and welding rods) represented 56.29% of counterfeit items. These categories highlight significant risks in construction and manufacturing materials.

Other categories, such as steel-fabricated products (45.03%) and aluminium products (44.37%), also exhibit substantial counterfeiting. Tubes (33.77%) and the Others category (0.66%) show lesser concern. These findings underscore the need for heightened vigilance and stronger regulatory measures to combat counterfeiting in the Metal and Allied sector, particularly for essential materials used in construction and infrastructure projects.

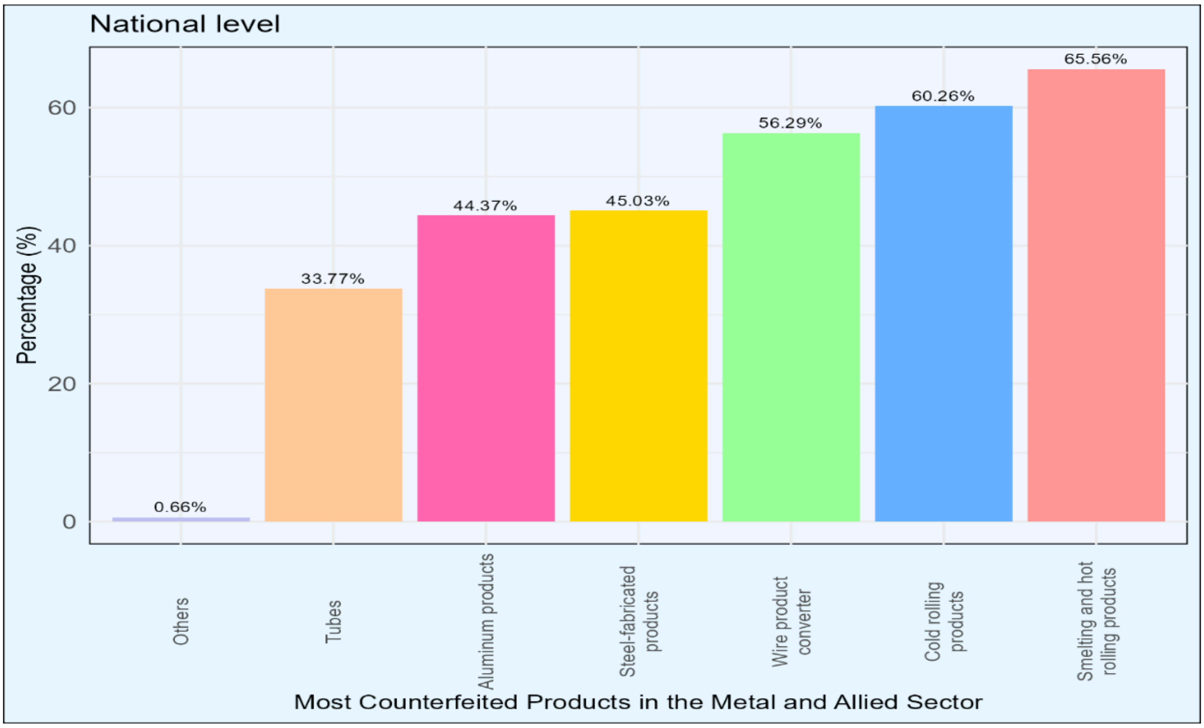

Figure 19: Counterfeited products in Metal & Allied Sector

3.2.12 Most Counterfeited Goods in Paper & Board Sector

Counterfeiting in the Paper and Board sector is prevalent, particularly in pulp and recycled paper, which account for 68.16% of reported incidents. This is especially concerning in bio-waste paper, a foundational component of the industry. Packaging products, such as paper bags and cartons, make up 67.16% of counterfeited items, reflecting the increased demand for sustainable solutions and the attraction for counterfeiters.

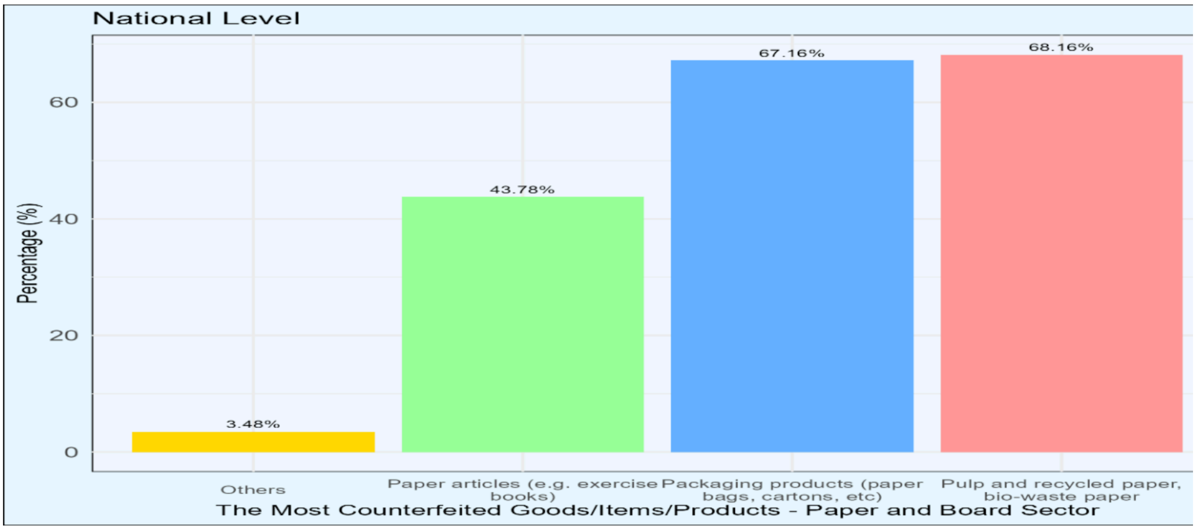

Figure 19: Counterfeited products in Paper & Board Sector

In contrast, finished goods, such as paper articles (exercise books), show a lower prevalence at 43.78%, while the Others category (3.48%) has a minimal impact. These findings highlight the urgent need for enhanced anti-counterfeiting measures to protect consumers and ensure product integrity in the Paper and Board sector. Collaboration among manufacturers, policymakers, and other stakeholders is essential for implementing effective strategies to reduce counterfeiting risks and promote authenticity in the marketplace.

3.2.13 Most Counterfeited Goods in Pharmaceutical & Medical Equipment Sector

The Pharmaceutical and Medical Equipment sector present alarming trends, particularly in medication. Antibiotics and anti-malaria drugs account for 89.28% of counterfeited products, posing significant risks to public health by compromising treatment efficacy and patient safety. Counterfeit vaccines are also a concern, with 44.54% of respondents highlighting their presence in the market.

Medical equipment, including crutches and wheelchairs, shows a lower incidence of counterfeiting at 28.25%, while the Others category accounts for 1.44%. These findings emphasize the critical need for stringent monitoring and regulation in the pharmaceutical supply chain to protect consumers from counterfeit products. Collaboration between manufacturers, healthcare providers, and policymakers is essential to develop effective strategies that combat counterfeiting in this sector.

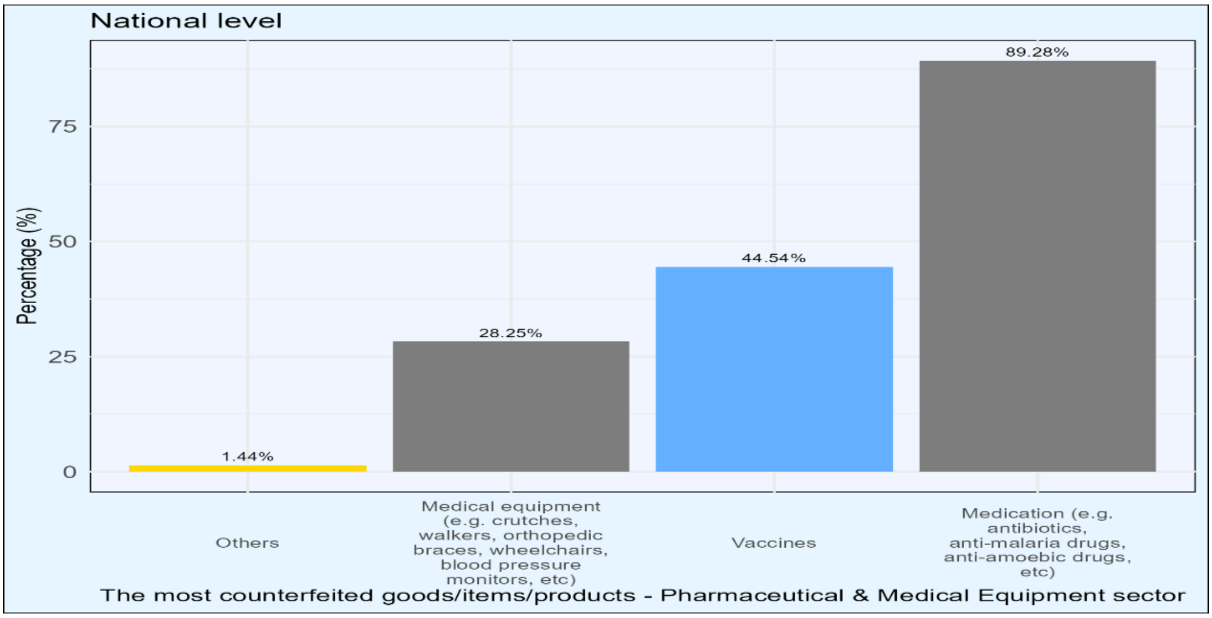

Figure 20: Counterfeit products in Pharmaceutical & Medical Equipment Sector

3.2.14 Most Counterfeited Goods in Plastics & Rubber Sector

Counterfeiting in the Plastics and Rubber sector is most prevalent in PET containers, accounting for 72.69% of total responses. This reflects the high demand for bottled goods and the associated risks of counterfeit items that may compromise consumer safety. Non-woven polypropylene (PPP) products, commonly used in shopping bags and hygiene items, account for 60.19%, raising environmental concerns, such as urban flooding caused by non-biodegradable materials clogging waterways.

Other categories, including plastic footwear, rubber products, and blow-molded containers, show varying levels of counterfeiting, with percentages ranging from 36.11% to 29.63%. These findings call for stricter regulatory measures, increased consumer awareness, and environmental initiatives to combat counterfeiting and its adverse effects on market integrity and the environment.

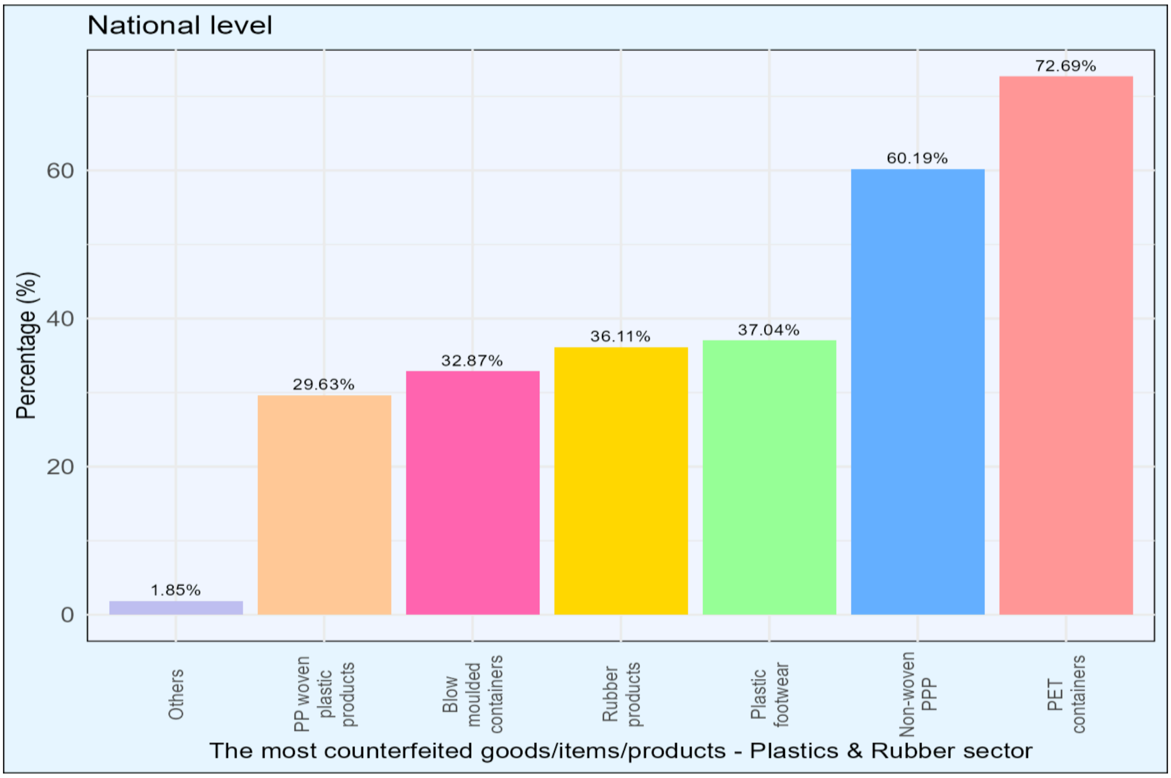

Figure 21: Most counterfeit products in Plastics & Rubber Sector

3.2.15 Most Counterfeited Goods in Textiles & Apparel Sector

The Textiles & Apparel sector is significantly affected by counterfeiting, particularly in men's and women's clothing, which account for 74.58% and 71.91% of reported cases, respectively. Children's clothing is also a concern, with 61.54% of respondents identifying it as counterfeit. The high prevalence in these categories suggests a strong demand for apparel, making them attractive targets for counterfeiters.

Undergarments and swimsuits account for 49.50%, while accessories such as caps and handbags make up 38.46%. Other textile products, like carpets and towels, represent 36.79%. The Others category accounts for only 1.67%, indicating that counterfeiting primarily concentrates on significant textile and apparel products.

These findings highlight the need for stricter regulations and consumer awareness to address counterfeiting in the textile and apparel sector, as it poses risks to consumer safety and brand integrity.

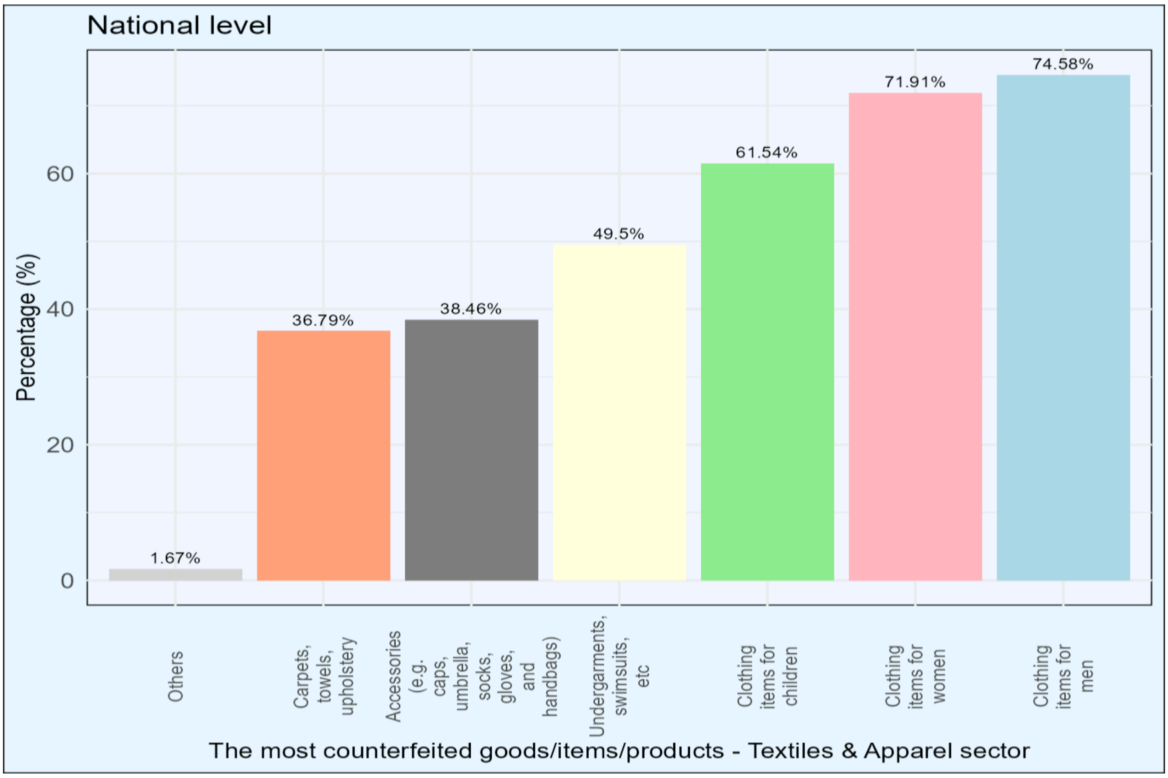

Figure 22:Most Counterfeited products in Textiles & Apparel Sector

3.2.16 Most Counterfeited Goods in Timber, Wood & Furniture Sector

The Timber, Wood, and furniture sector faces significant counterfeiting issues, particularly with furniture and particle boards, which account for 79.13% of reported cases. Wooden building materials, such as windows, doors, door frames, and plywood, also show high levels of counterfeiting at 75.65%. The Others category accounts for only 2.61%, indicating minimal concerns outside the primary counterfeit products in the sector. These findings underscore the need for stronger regulatory frameworks and enforcement measures to combat counterfeiting in this sector, especially regarding furniture and wooden building materials.

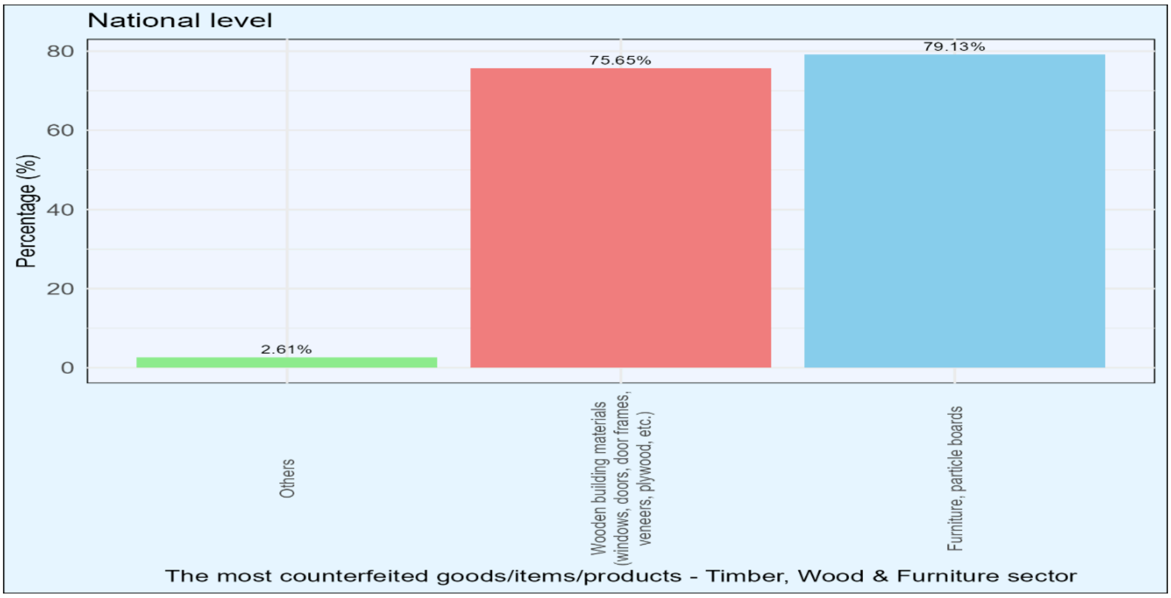

Figure 23: Most Counterfeited products in the Timber, Wood and furniture Sector

3.2.17 Most Counterfeited Goods in Tobacco Products Sector

Counterfeiting in the Tobacco products sector is most prevalent in cigarettes, which account for 89.47% of total responses. Other products, such as cigars (23.98%), pipe tobacco (23.98%), and roll-your-own tobacco (23.39%), are also counterfeited, though at lower rates. Smokeless tobacco follows with 20.47%, while the Others category represents only 0.58%. These findings highlight cigarettes as a significant target for counterfeiters, necessitating focused efforts to combat counterfeiting in the Tobacco products sector through regulatory enforcement and collaborative action with manufacturers.

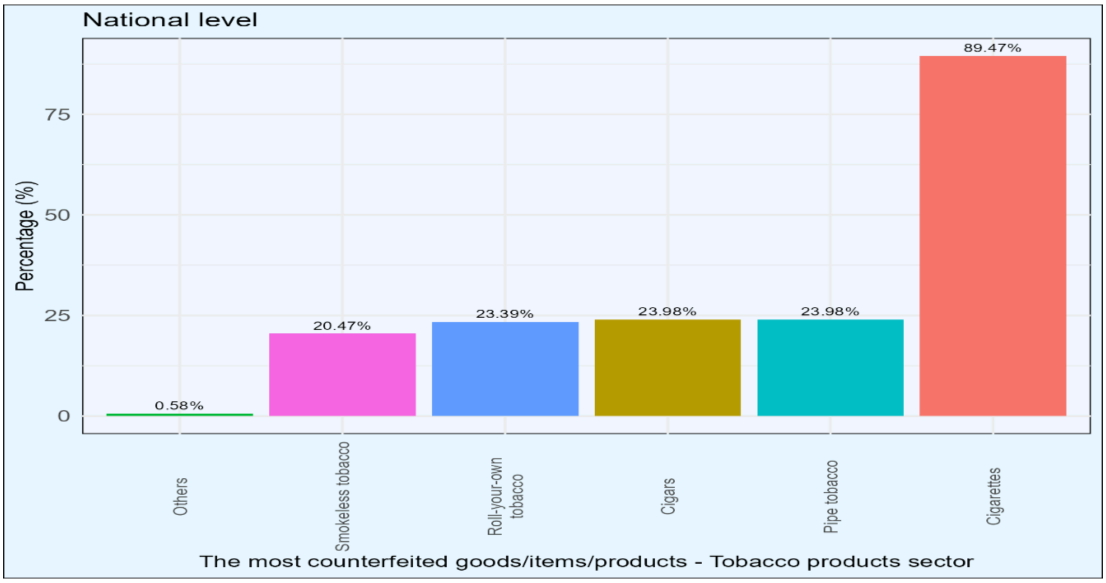

Figure 24: Counterfeited products in Tobacco Products Sector

3.2.18 Most Counterfeited Goods in Cosmetics & Personal Care Hygiene Sector

The Cosmetics and Personal Care Hygiene sector faces high rates of counterfeiting, especially in personal care products, including skincare items, toothpaste, shampoos, and sanitizers, which account for 88.32% of counterfeit reports. Artificial hair and hair care products (such as hair dyes and styling products) also have substantial counterfeiting rates at 67.72%, driven by high consumer demand. Tissue products, including diapers and sanitary towels, are also counterfeited, with a rate of 34.12%, raising concerns about the quality and safety of essential hygiene items. The Others category accounts for only 1.05% of counterfeit items.

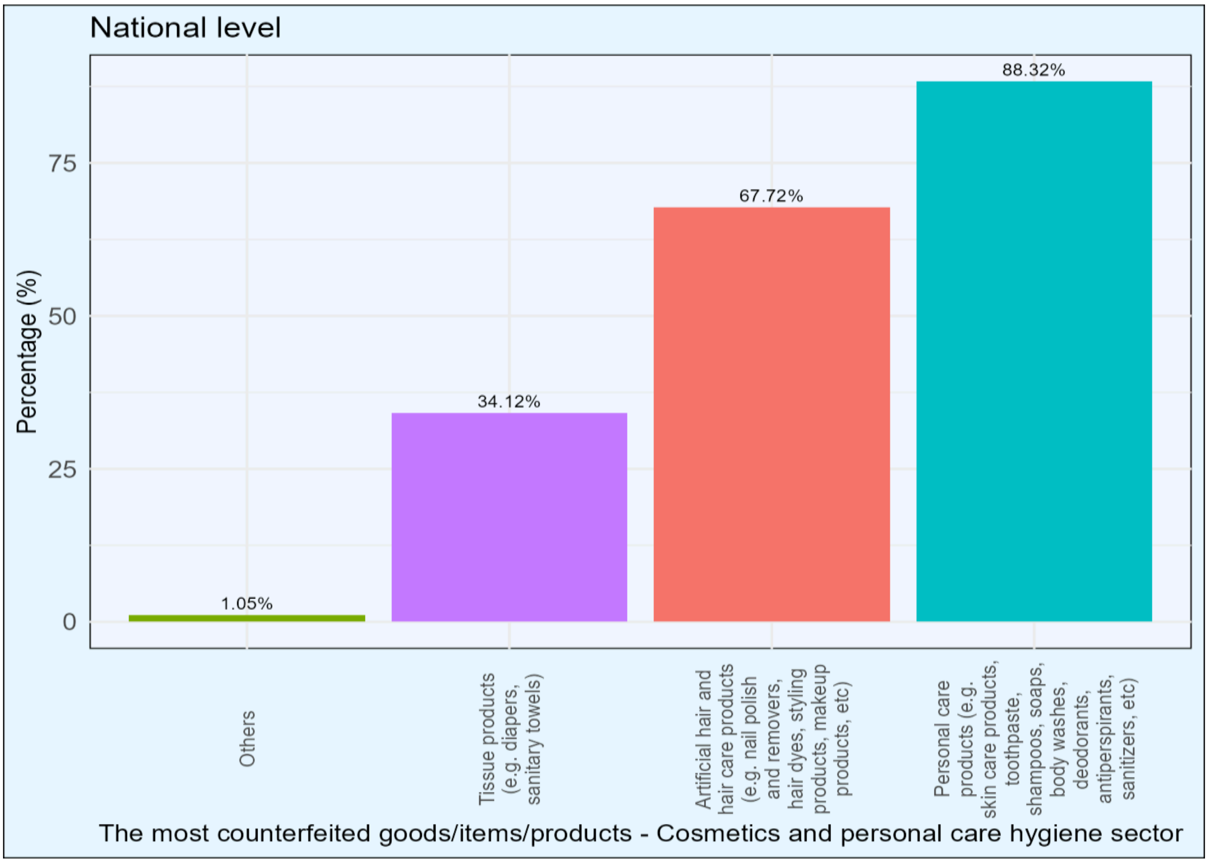

Figure 25: Most counterfeited goods in the Cosmetics & Personal Care Hygiene Sector

3.2.19 Sources of Informing and Ability to Identify Counterfeit Products

The survey results highlight that brand knowledge (70.87%) and **a**dvertisements (54.28%) are the most significant sources informing consumers about counterfeit products. On the other hand, Anti-Counterfeit Authority (ACA) forums (8.61%) have a relatively low impact. To expand its reach, the ACA should consider collaborating with brands to enhance consumer education through joint campaigns and the use of certification labels to help identify genuine products. Additionally, expanding media and advertising efforts can capitalize on the strong role that advertisements already play in raising awareness. The ACA should also scale up its sensitization forums and seminars (16.59% and 12.22%, respectively) by partnering with local organizations and utilizing digital platforms for broader outreach. At a policy level, the ACA could focus on enforcing stricter regulations on advertising to prevent the promotion of counterfeit products and mandate clearer labeling standards for authentic products. These results suggest that consumers heavily rely on familiar brands and advertising, signaling an opportunity for policy-driven initiatives to improve the transparency of the supply chain and prioritize consumer education in anti-counterfeiting strategies.

	National level	
Some sources that inform consumers on counterfeiting in Kenya	**Count**	**Percentage (%)**
Forums organized by the Anti-Counterfeit Authority (ACA)	193	8.61
Advertisements	1217	54.28
Other Awareness Campaigns	241	10.75
Brand Knowledge	1589	70.87
Educational Seminars	274	12.22
Sensitization Forums	372	16.59

Figure 26: Sources of Informing and Ability to Identify Counterfeit Products

3.2.20 Sources of Level of confidence in identifying counterfeit goods

When asked to rate their confidence in identifying counterfeit goods across the 16 sectors, the survey responses revealed varying levels of confidence. In most sectors, respondents reported moderate to high confidence in their ability to detect counterfeit products. For example, in the automotive sector, 33.9% of respondents expressed confidence, and 12.0% were very confident. Similarly, in the alcoholic beverages sector, 31.7% were moderately confident, with 12.9% indicating very high confidence. In the agriculture sector, 25.9% of respondents were confident, and 11.9% were very confident.

However, there were notable gaps in confidence in sectors like paper and board, plastic, and tobacco, where a significant number of respondents reported low confidence in identifying counterfeit goods. Specifically, 29.6% of respondents in the paper and board sector, 17.6% in the plastic sector, and 19.9% in the tobacco sector indicated they were only slightly confident. Additionally, a small but concerning percentage of respondents reported no confidence at all in identifying counterfeits, especially in the paper and board (10.0%) and plastic sectors (10.6%).

The data suggests that Kenya needs to enhance policies and enforcement around counterfeiting. This includes increased public awareness campaigns, sector-specific training and guidelines, stronger enforcement mechanisms, and policy creation focusing on emerging risks. Public education efforts should target sectors with lower confidence, such as plastics and paper/board. Implementing sector-specific training to help consumers distinguish genuine products from counterfeits will also be critical. Moreover, stricter regulation and monitoring of low-confidence sectors like tobacco and paper/board could reduce the circulation of counterfeit products.

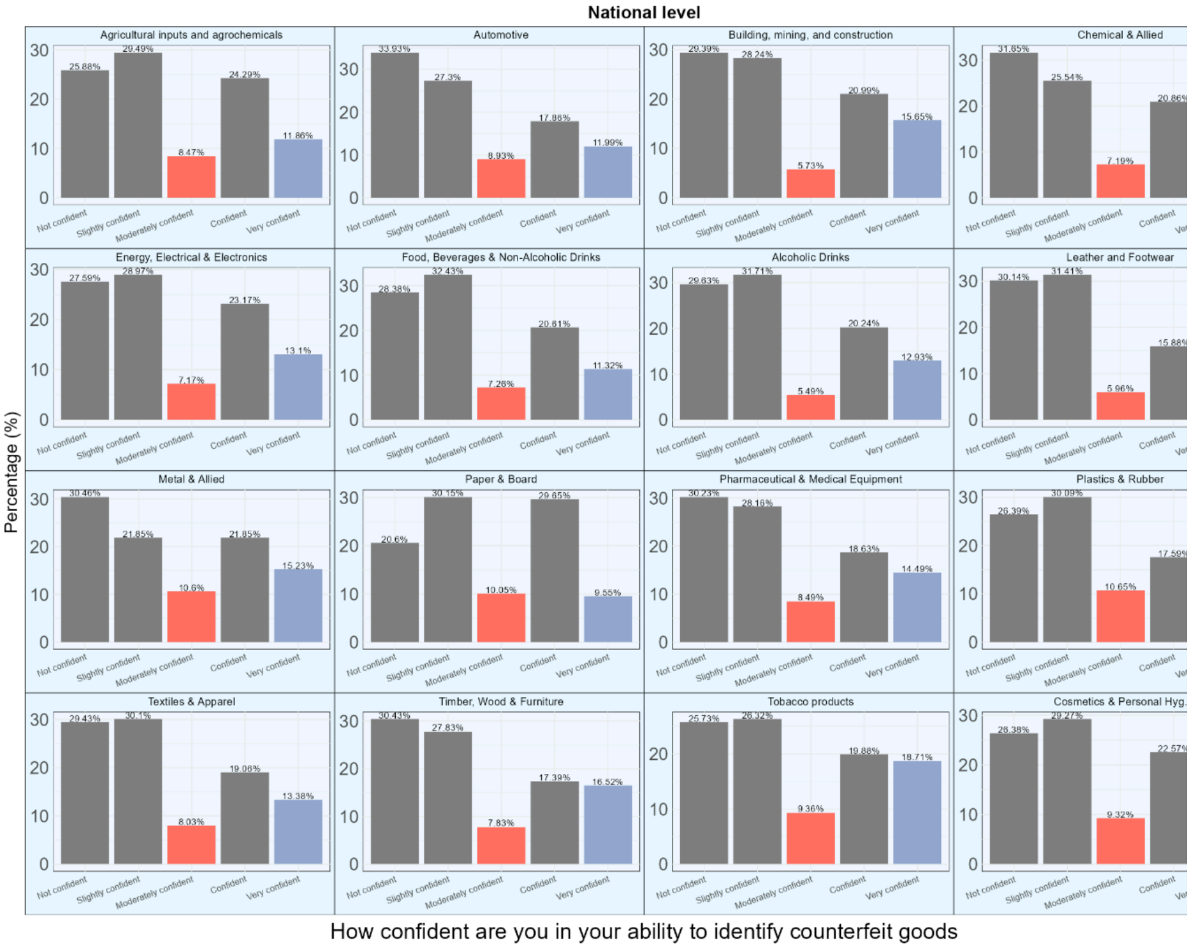

Figure 27 Sources of Level of confidence in identifying counterfeit goods

3.2.21 Awareness of the negative impact of counterfeiting on the Kenyan economy

The results reveal a high level of awareness among respondents regarding the negative impact of counterfeiting on the economy, with 80.45% acknowledging its adverse effects, compared to 19.55% who were unaware. This level of awareness suggests that education and awareness campaigns have been effective, demonstrating a strong understanding of the issue within the community.

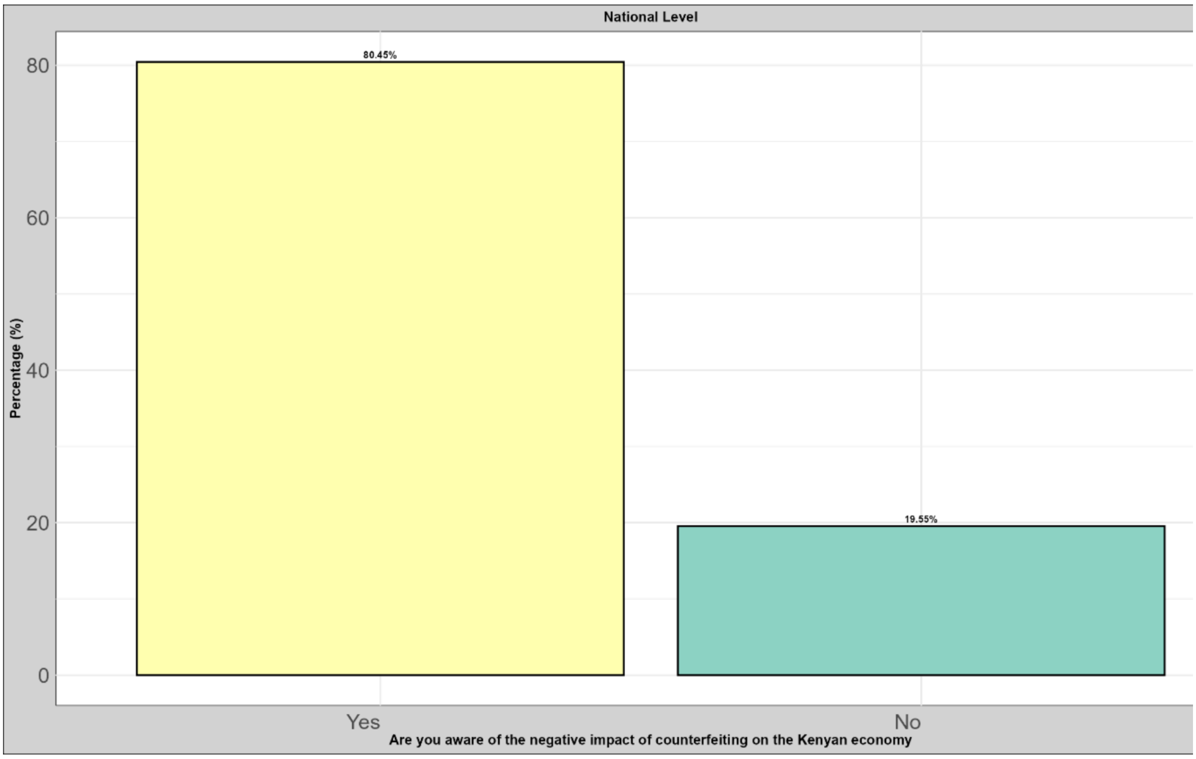

Figure 28: Awareness of the negative impact of counterfeiting on the Kenyan economy

Policymakers can leverage this awareness to advocate for stricter regulations against counterfeiting, as an informed public is more likely to support initiatives aimed at combating counterfeit goods. Additionally, targeted educational campaigns can address the minority of respondents who are still unaware of the issue, while continuous monitoring of public perception will ensure that policies remain responsive to evolving attitudes. Overall, these findings provide a solid foundation for further policy actions to effectively tackle the challenges posed by counterfeiting in the economy.

3.2.22 Adverse effects of counterfeiting to the Kenyan Economy

The survey results indicate that the Kenyan economy is significantly affected by counterfeiting, with a majority of respondents understanding the economic consequences. The highest awareness was for the loss of investment opportunities (64.45%), which deters both local and foreign investments. Additionally, 61.73% of respondents recognized the loss of government revenue, which impacts tax collection and public services. Furthermore, 59.51% were aware of the loss of employment opportunities due to counterfeiting, as it undermines legitimate businesses and job markets.

Only a small percentage (5.79%) mentioned other impacts, indicating that the majority of respondents are well-informed about the primary negative effects of counterfeiting on Kenya's economy. This high level of public awareness could be crucial in supporting future anti-counterfeiting measures.

	Impact of Counterfeiting	
Impact	Count	Percentage (%)
Loss of Employment Opportunity	1048	59.51
Loss of Investment Opportunities	1135	64.45
Loss of Government Revenue	1087	61.73
Other	102	5.79

Figure 29 Adverse effects of counterfeiting to the Kenyan Economy

3.2.23 Awareness of legal consequences of engaging in counterfeit Trade

The results show that 77.07% of respondents are aware of the legal consequences of engaging in the trade (buying or selling) of counterfeit products, while 22.93% are not. Although this level of awareness is relatively strong, it is notably lower compared to the 80.45% awareness level seen in the previous question about the negative economic impacts of counterfeiting. This discrepancy suggests that while many consumers are informed about the broader economic harm of counterfeiting, fewer are fully aware of the specific legal penalties, indicating a gap in legal awareness that could be addressed through targeted campaigns.

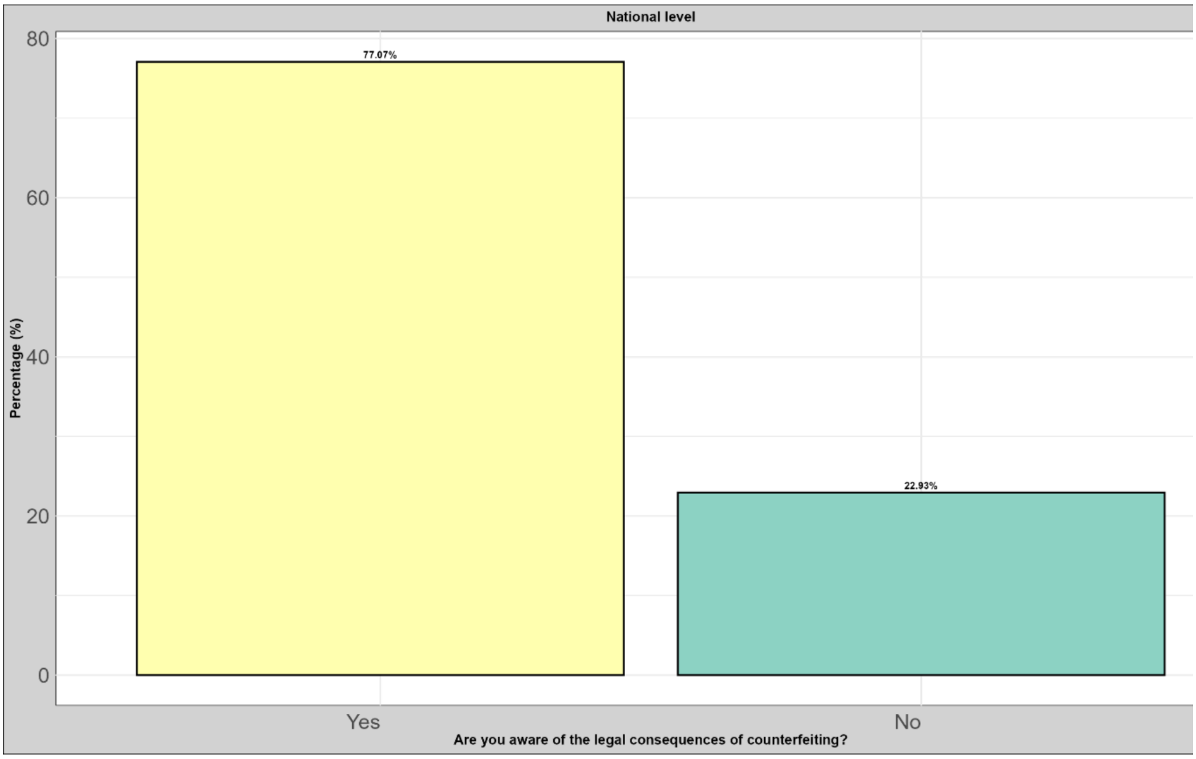

Figure 30:Awareness of legal consequences of engaging in counterfeit Trade

3.2.24 Legal Consequences of Buying Illicitly Traded Goods

The survey results indicate a generally high level of awareness among respondents regarding the legal consequences of buying or selling illicitly traded goods. The most recognized consequences include imprisonment or jail time (74.42%) and fines or monetary penalties (70.43%), reflecting a strong understanding of the severe repercussions involved. Nearly half of the respondents (47.28%) were aware that counterfeit goods can be confiscated, but awareness dropped significantly when it came to potential criminal records or legal charges (33.91%) and civil lawsuits from affected brands (26.45%).

Only a small percentage (1.56%) mentioned other consequences, indicating that most respondents focus on the common legal penalties. This pattern suggests that while consumers are informed about the more severe legal penalties, there is a noticeable gap in awareness regarding the broader implications of counterfeiting, particularly in terms of civil actions. This discrepancy highlights the need for enhanced educational initiatives to inform consumers about all aspects of counterfeiting, thereby fostering a more comprehensive understanding of its consequences.

Awareness of the legal consequences of counterfeiting	National level Count	Percentage (%)
Fines or monetary penalties	1217	70.43
Imprisonment or jail time	1286	74.42
Confiscation of counterfeit goods	817	47.28
Criminal record or legal charges	586	33.91
Civil lawsuits from affected brands or manufacturers	457	26.45
Other	27	1.56

Figure 31:Legal Consequences of buying illicitly traded goods

3.2.25 How to enhance awareness of counterfeiting

Figure 32: How to enhance awareness of counterfeiting

To enhance awareness of counterfeiting, the Kenyan government should adopt a strategic partnership, rigorous certification processes, and widespread targetted public education campaigns. Key actions include:

- **Formulating and enforcing stricter regulations** to deter counterfeit activities.

- **Publishing informative materials** and conducting **educational outreach** through **roadshows** and **forums**, particularly in **local languages** to reach diverse communities.
- **Collaborating with stakeholders**, including retailers, producers, and educational institutions, to mobilize collective efforts and share vital information.
- Establishing **hotlines for reporting counterfeit goods** and supporting **community gatherings**.
- Utilizing **media platforms** for effective communication, including television, radio, and social media.

3.3 Establishing Consumer Experience in Buying Counterfeits (Offline and Online)

3.3.1 Purchase of Counterfeit Goods

Survey results show that 60.48% of respondents admitted to purchasing counterfeit goods, either knowingly or unknowingly, in the past 12 months, while 38.52% reported no such purchases. This indicates a high prevalence of counterfeit purchases and highlights the need for increased consumer awareness about product authenticity.

The findings suggest that a knowledge gap exists regarding the risks of counterfeit goods. Educational initiatives should focus on why consumers buy counterfeit goods—whether due to lower prices or limited availability—and address these motivations through targeted interventions, such as stricter regulations and enhanced product verification processes. Understanding consumer sentiment toward counterfeit purchases can help inform policy and marketing strategies, guiding efforts to protect consumers and legitimate businesses.

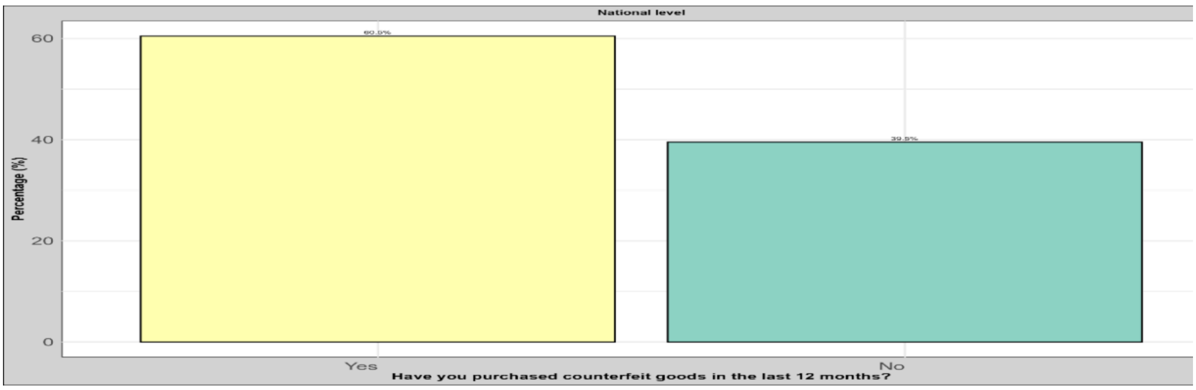

Figure 33:Purchase of Counterfeit Goods

3.3.2 Consumer Responses to Counterfeit Purchases

Upon purchasing counterfeit products, 41.65% of respondents continued using the items, suggesting either indifference or a lack of viable alternatives. Meanwhile, 30.33% of respondents disposed of the counterfeit items, possibly due to dissatisfaction or awareness of potential risks. A smaller group (17.09%) returned the counterfeit goods, while 8.09% gave them away. Only 2.32% of respondents reported the counterfeit goods, indicating low levels of awareness regarding reporting mechanisms or perceived inefficacy in taking such actions. The minimal percentage (0.51%) taking "other" actions suggests that most consumer responses fit within the common categories. These findings reveal a range of consumer reactions to counterfeit goods, with continued use being the most common, followed by disposal, reflecting mixed responses to counterfeit purchases.

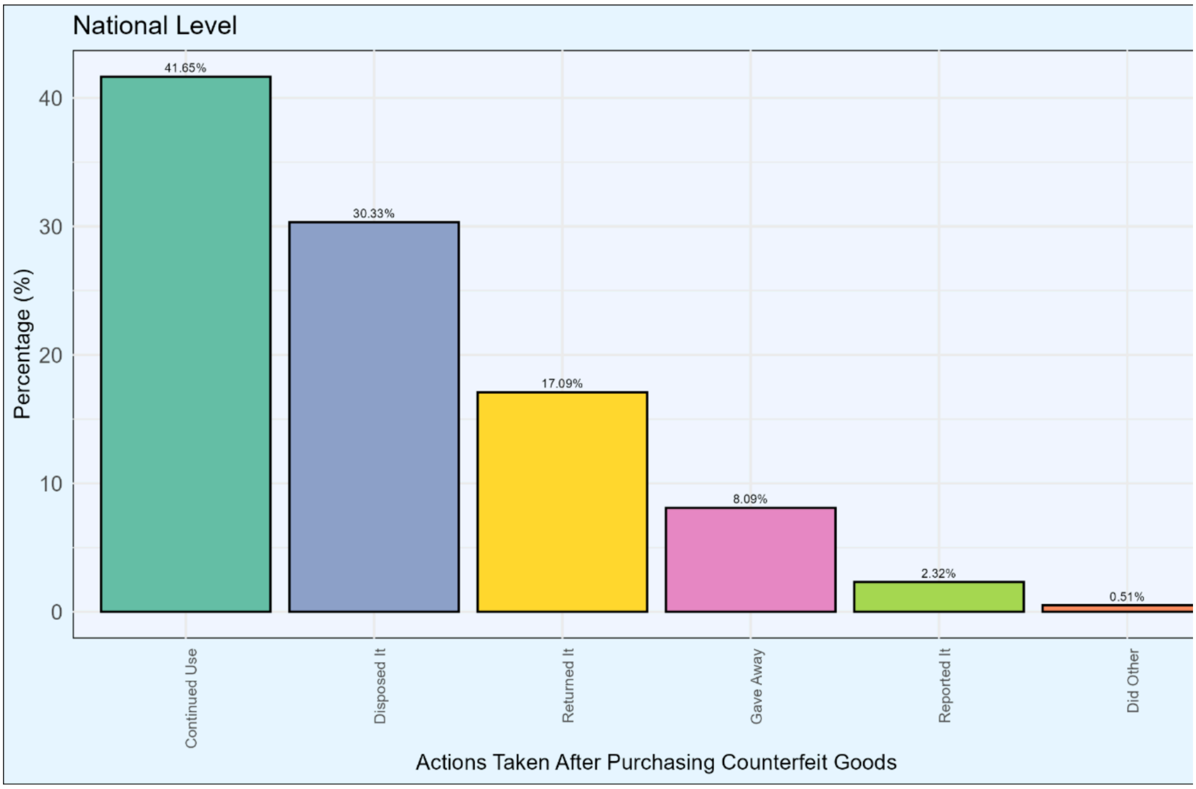

Figure 34:Consumer Responses to Counterfeit Purchases

3.3.3 Places Where Counterfeit Goods Were Purchased

The results show that counterfeit goods were primarily purchased from street sellers (59.37%) and shops or kiosks (54.42%), indicating that even more formal retail environments are susceptible to counterfeit items. Online platforms accounted for 31.27% of counterfeit purchases, reflecting the growing role of e-commerce in the counterfeit trade. Supermarkets, typically considered more regulated, accounted for 21.31%, raising concerns about the vulnerability of formal retail spaces.

Other purchase locations comprised only 2.36%, suggesting that counterfeit goods are mainly found in more common retail channels. These findings emphasize the widespread availability of counterfeit goods across both informal and formal purchase points, posing significant challenges for regulation and consumer protection.

	National level	
The places from where you bought the counterfeit goods in the last 12 months	**Count**	**Percentag (%**
Online Platforms	424	31.2
Street Seller	805	59.3
Shops/Kiosks	738	54.4
Supermarkets	289	21.3
Other Spaces	32	2.3

Figure 35: Places Where Counterfeit Goods Were Purchased

3.3.4 Percentage of Counterfeit Goods Purchased Online

Survey data indicates that the majority of respondents purchased a relatively small percentage of counterfeit goods online. Specifically, 37.68% reported that less than 10% of the counterfeit items they bought were sold online, while 23.22% indicated that 20-29% of their counterfeit purchases were made online. 20.14% of respondents reported purchasing 30% or more of counterfeit goods online, while smaller percentages bought 10-19% (18.72%) and 10-20% (0.24%) online.

These results suggest that while online platforms contribute significantly to counterfeit purchases, the majority of counterfeit goods are still acquired through other channels, underscoring the importance of both online and offline monitoring in anti-counterfeiting measures.

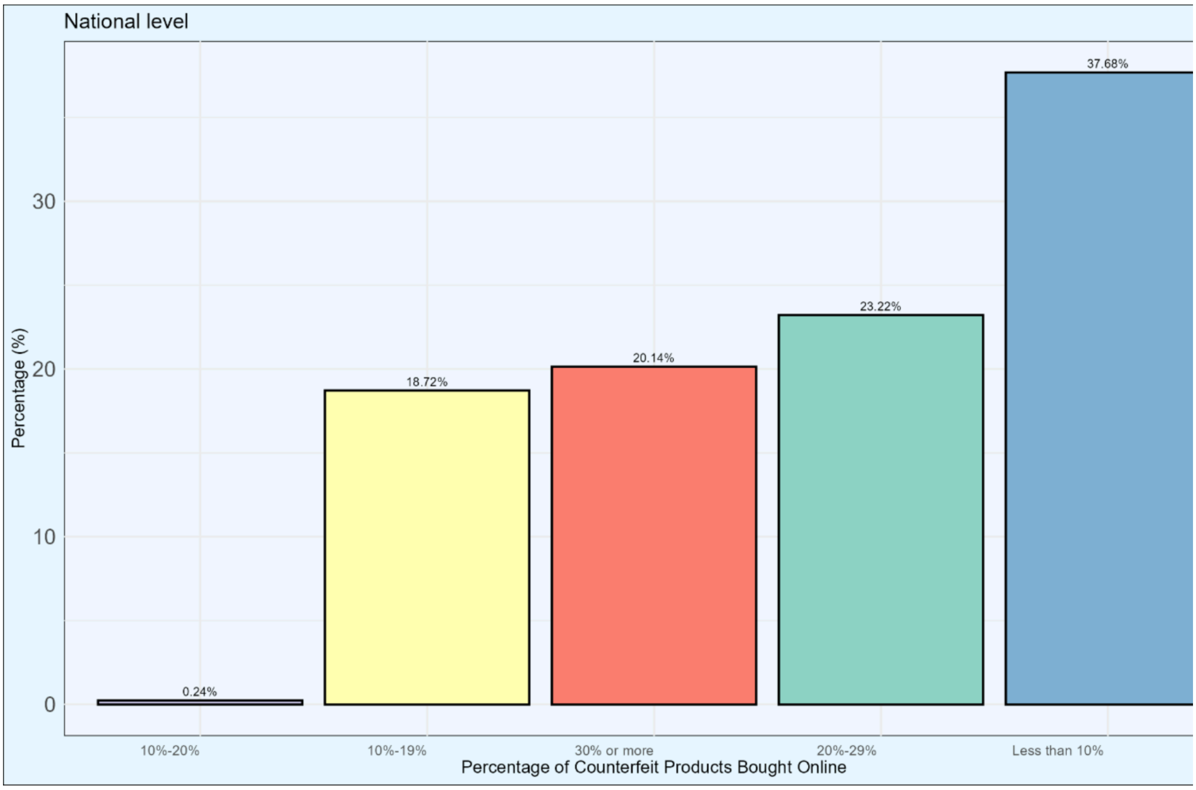

Figure 36:Percentage of Counterfeit Goods Purchased Online

3.3.5 Frequency of Online Purchases in the Last 12 Months

The survey results on the frequency of online purchases across various sectors indicate that 38.63% of respondents buy online occasionally, a few times a year. This is followed by 23.22% who reported buying rarely (once a year or less), and 20.62% who purchase online sometimes (about once a month). A smaller group (13.74%) reported purchasing more frequently, a few times a month, while only 3.79% of respondents indicated they shop online very frequently (at least once a week). These findings suggest that online purchasing tends to be infrequent for most respondents, which may reflect hesitancy or specific considerations when buying online, particularly in sectors prone to counterfeiting.

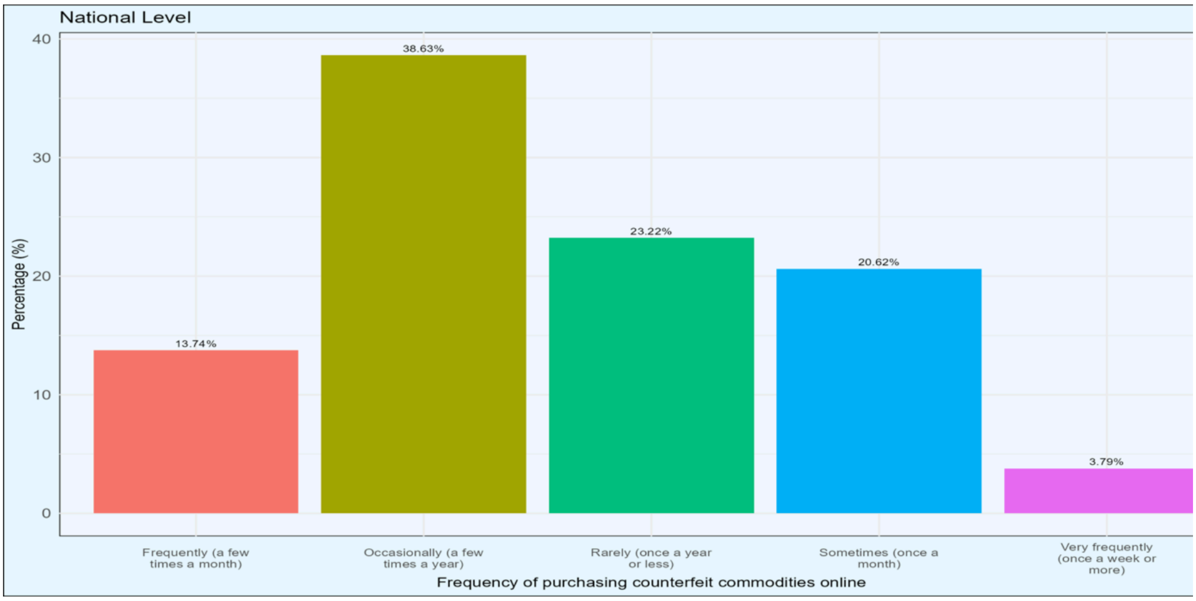

Figure 37: Frequency of Online Purchases in the Last 12 Months

3.3.6 Online Platforms Used for Purchasing Counterfeit Goods

The data reveals that counterfeit goods are purchased from a variety of online platforms. E-commerce giants like Jumia and Kilimall dominate the list, indicating their significant role in facilitating online counterfeit trade. Social media platforms such as Facebook and Instagram are also becoming prominent marketplaces, highlighting their growing influence in counterfeit transactions. These findings underscore concerns about transparency and trust in online shopping, signalling the need for better consumer protection and stricter monitoring of online marketplaces to curb the sale of counterfeit goods.

Figure 38:Online Platforms Used for Purchasing Counterfeit Goods

3.3.7 Origin of Counterfeit Products Bought Online

A majority of respondents (56.40%) believe that some counterfeit goods purchased online originate from other countries, reflecting an awareness of the global nature of the counterfeit trade. In contrast, 13.51% of respondents believe that these products do not come from abroad, while 30.09% are unsure of the origins, suggesting a lack of information or awareness regarding the complexities of international counterfeit trade.

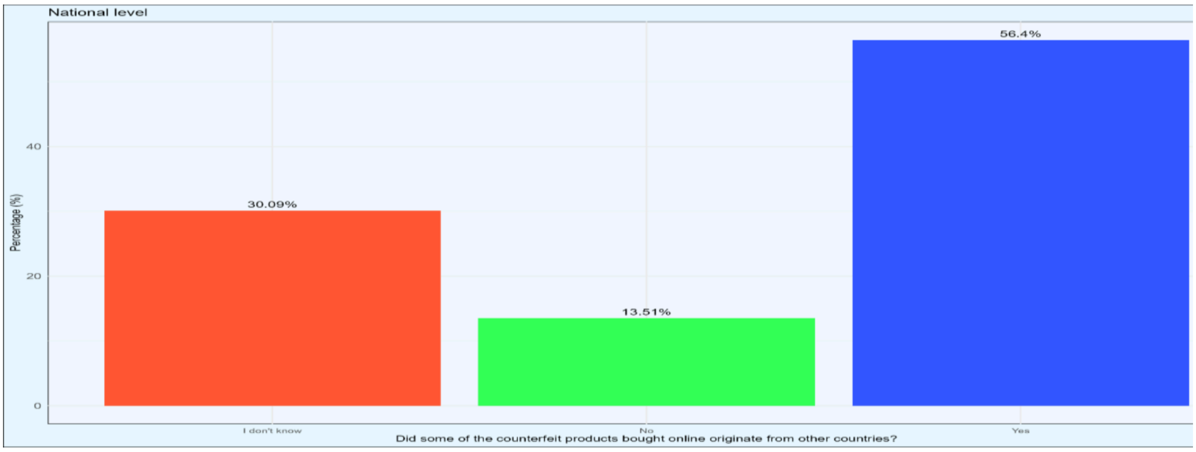

Figure 39:Origin of Counterfeit Products Bought Online

3.3.8 Countries of Origin for Online Counterfeit Goods

Most respondents associate China with the origin of counterfeit goods, reflecting perceptions of manufacturing quality. Other countries mentioned include Turkey, Japan, and Tanzania, with some respondents also indicating uncertainty about product origins.

Figure 40:Countries of Origin for Online Counterfeit Goods

3.3.9 Origin of Counterfeit Goods Bought Offline

When asked about the origin of counterfeit goods purchased through non-online channels, 61.67% of respondents believed the goods came from foreign sources, while 38.33% did not. This majority indicates that international counterfeit products are also prevalent in physical retail spaces, such as markets, street vendors, and physical shops.

Regional analysis reveals that counties such as Busia (76.8%) and Kisumu (80.2%) reported higher awareness of counterfeit origins than the national average, while counties like Nakuru (60.9%) and Nyeri (52.2%) showed lower levels of awareness. This suggests the need for localized educational initiatives to align regional understanding with the broader national context.

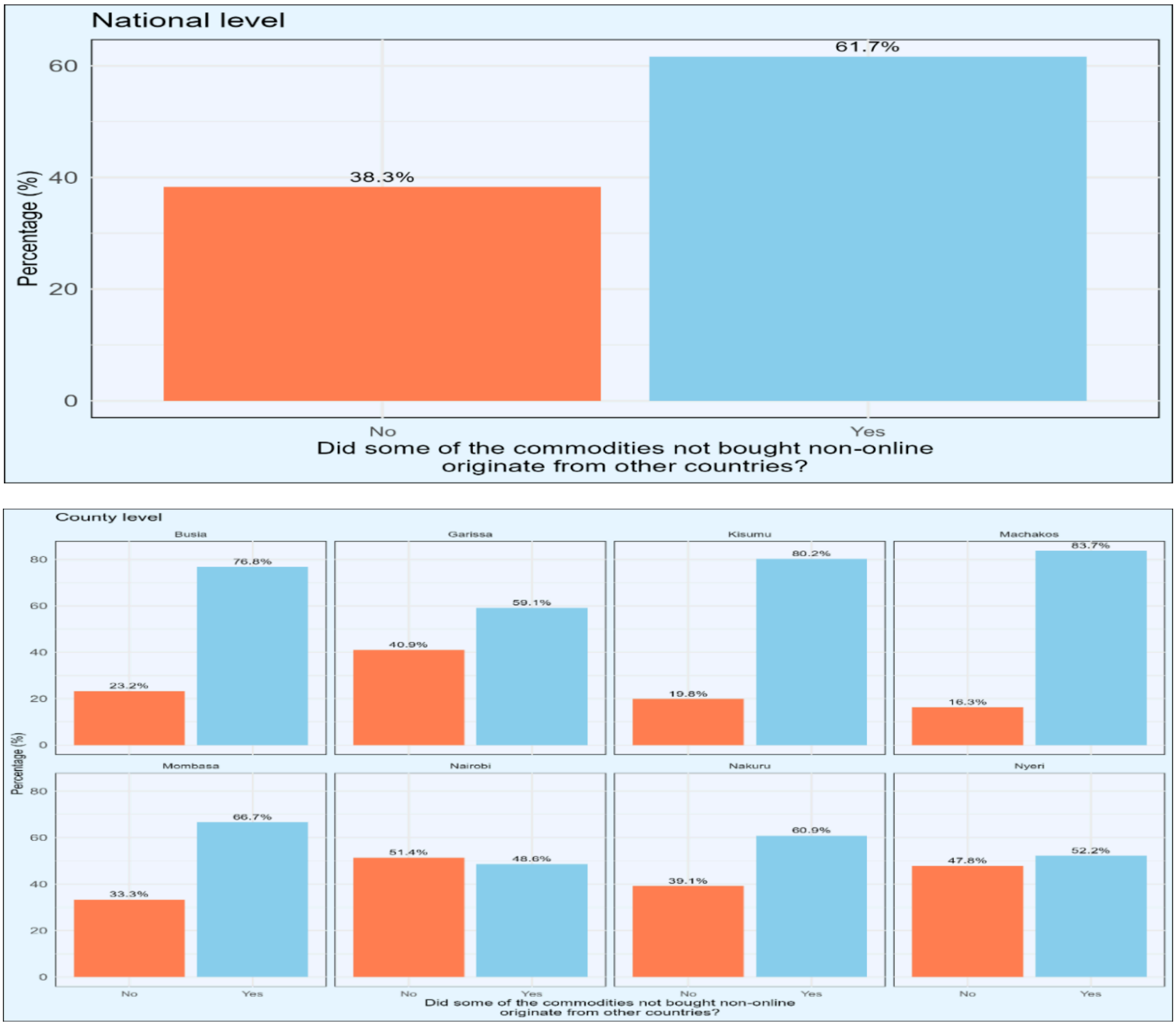

Figure 41:Origin of Counterfeit Goods Bought Offline

3.3.10 Countries of Origin for Offline Counterfeit Goods

In terms of the origin of counterfeit products purchased offline, China was most frequently cited, followed by Kenya and Uganda. Other countries mentioned included India, Japan, and the USA. Some consumers were unsure of product origins, reflecting a lack of clarity regarding supply chains.

Figure 42:Countries of Origin for Offline Counterfeit Goods

3.3.11 Counterfeit Goods Not Bought Online That Were Imported

The survey results regarding the percentage of counterfeit goods not bought online that were imported provide important insights into consumer perceptions. Approximately 39.61% of respondents believe that less than 10% of these counterfeit goods are imported, suggesting a significant level of trust in locally sourced products or a lack of awareness regarding the origins of counterfeit items.

In contrast, 17.99% of respondents estimated that 10% to 19% of counterfeit goods were imported, while 16.06% believed that 20% to 29% of such products were of foreign origin. Notably, 26.34% of respondents acknowledged that 30% or more of counterfeit goods were imported, underscoring growing concerns about the prevalence of foreign counterfeits in the market.

These findings highlight the need for increased consumer education to raise awareness about the risks associated with both locally and internationally sourced counterfeit goods. By empowering consumers with better information on the origins and risks of counterfeit products, they can make more informed purchasing decisions and reduce their exposure to harmful counterfeit goods

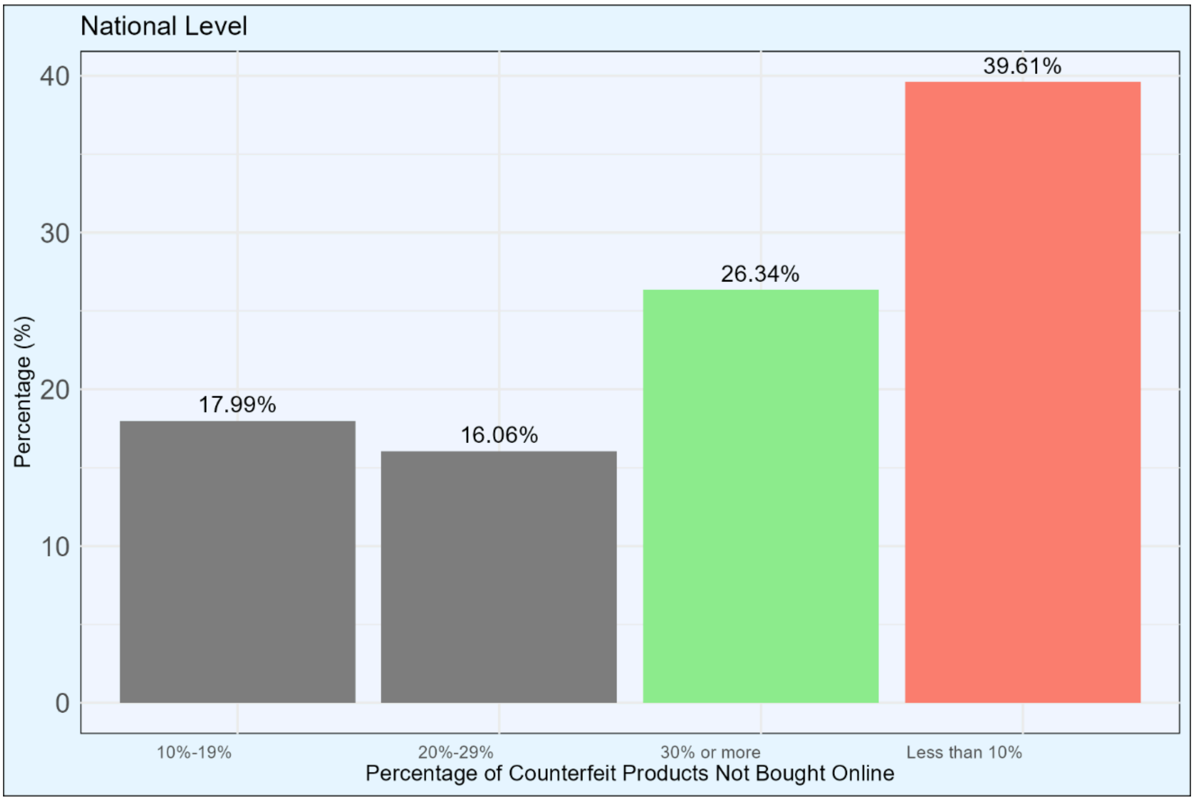

Figure 43: Percentage of Counterfeit Goods Not Bought Online That Were Imported

3.3.12 Personal Experience and Adverse Effects of Counterfeit Goods

Most respondents, 57.72%, reported having personally experienced adverse effects from counterfeit goods, indicating a significant issue with counterfeit products in the Kenyan market. The consequences of counterfeit goods can range from financial losses due to poor-quality items to serious health risks from counterfeit pharmaceuticals or unsafe electronics. These results underscore the urgent need for consumer education, increased awareness about the dangers of counterfeit products, and stronger regulatory measures to curb their sale.

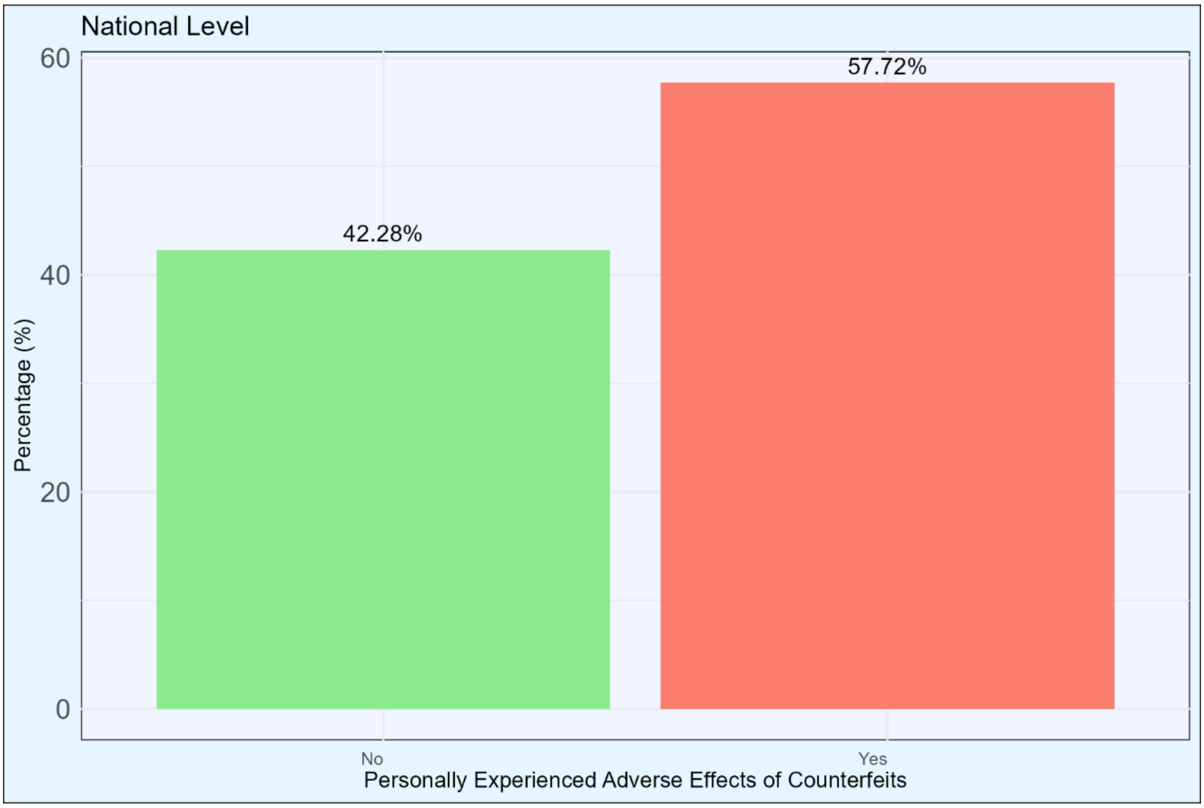

*Figure 44:*Personal Experience and Adverse Effects of Counterfeit Goods

The survey also reveals regional variations in consumer experiences. In Busia, 61.4% of respondents reported adverse effects, which is higher than the national average of 57.72%. Conversely, in Garissa, 76.2% of respondents reported no experiences with counterfeit goods, suggesting a lower prevalence of such products. In Kisumu and Machakos, 75.2% and 73.7%, respectively, reported negative experiences, while in Mombasa, 76.6% of respondents claimed to have no adverse effects. Nairobi reported 59.7% of respondents experiencing negative effects, with Nakuru and Nyeri showing 61.7% and 65.9% respectively.

These findings suggest a diverse landscape of consumer experiences with counterfeit goods across counties. Some regions show a higher prevalence of adverse effects, while others demonstrate a greater sense of protection or lack of experience with counterfeit product

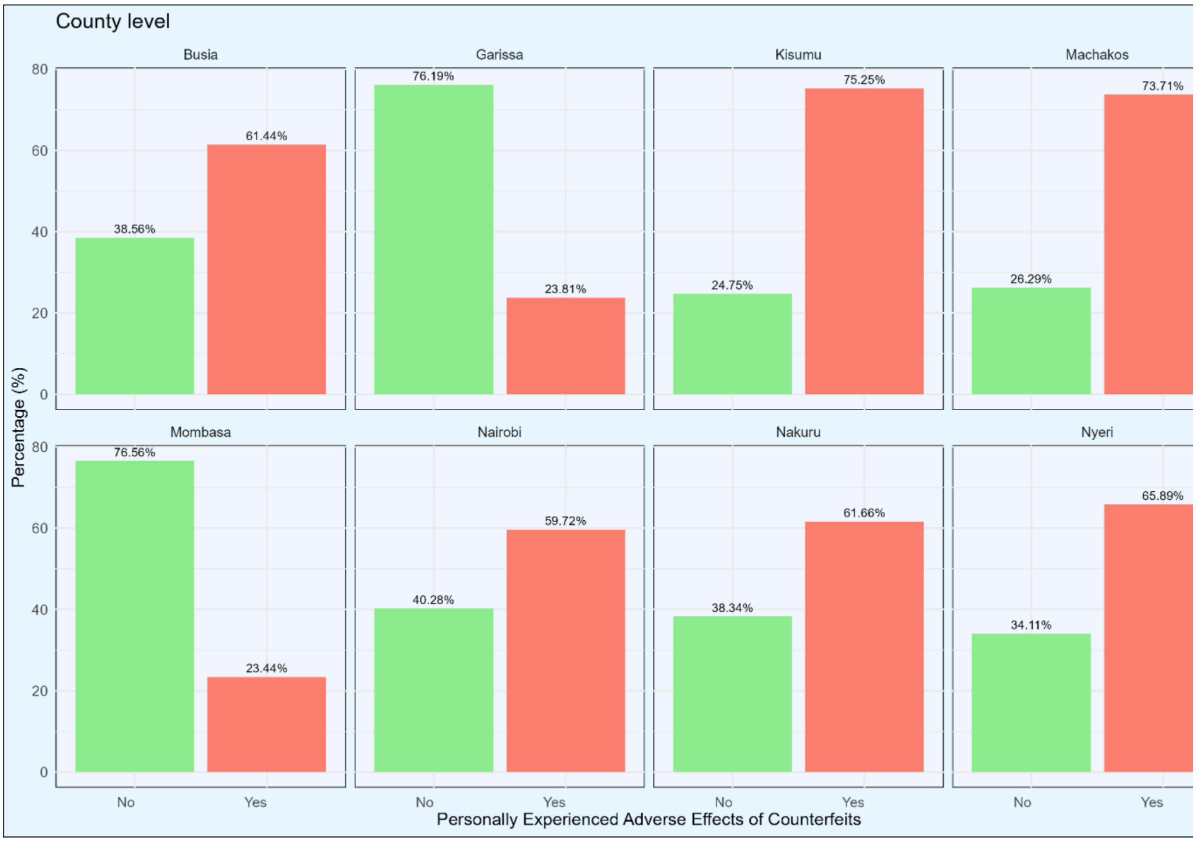

Figure 45: Personal Experience and Adverse Effects of Counterfeit Goods

3.3.13 Adverse Effects Experienced from Counterfeit Goods

The survey results reveal significant concerns regarding the adverse effects experienced by consumers due to counterfeit goods. A notable 32.5% of respondents reported that counterfeit products had a short shelf life, highlighting the lack of quality and safety standards associated with these items. Additionally, 29.8% of respondents experienced financial losses after purchasing counterfeit goods.

16.6% of respondents faced hospitalization due to the health risks posed by counterfeit products, particularly counterfeit pharmaceuticals or unsafe electronic devices. Smaller percentages reported unemployment (9.84%) and disabilities (2.15%) as adverse effects, reflecting the broader social and economic consequences of counterfeit goods.

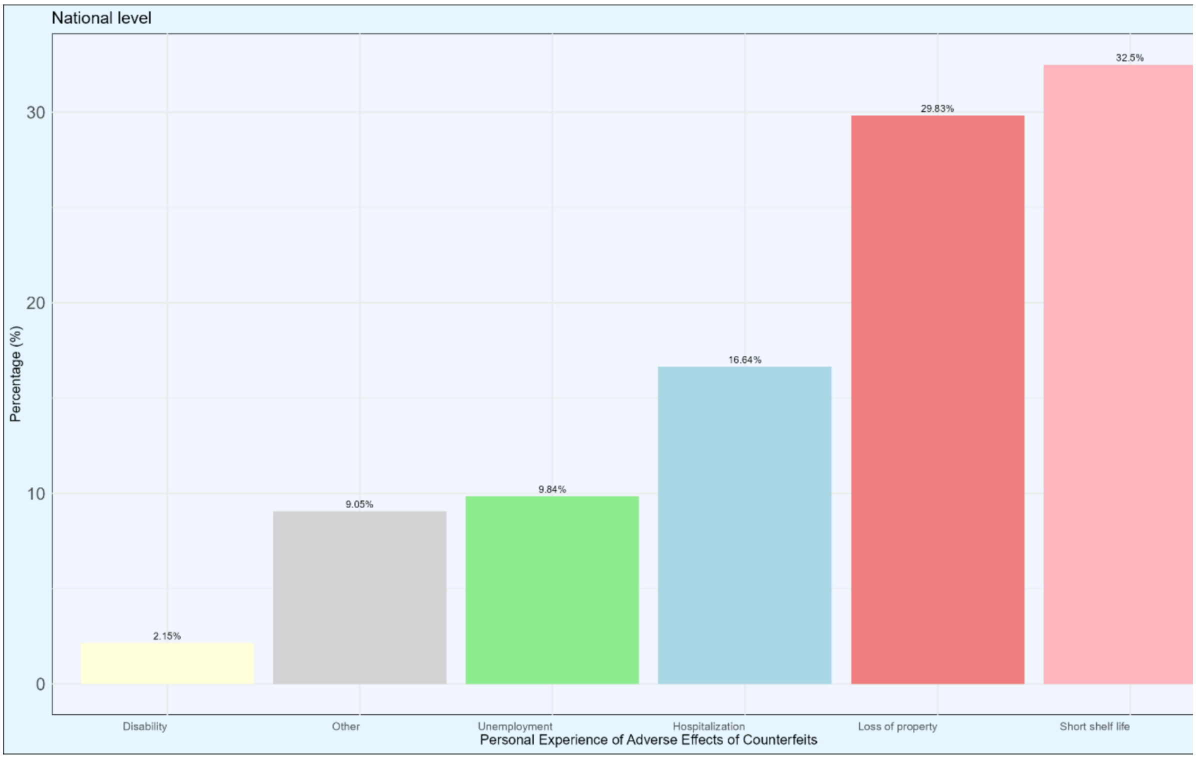

Figure 46:Adverse Effects Experienced from Counterfeit Goods

3.4 Establishing A Change In Consumer Mindset Against Counterfeiting

3.4.1 Consumers' Belief in the Authenticity of Counterfeit Goods Purchased

The survey revealed that 69.56% of respondents unknowingly purchased counterfeit goods in the past 12 months, suggesting that identifying genuine products remains a challenge for many consumers, and that there is a high deceptive counterfeit consumption in the Kenyan markets. The difficulty in distinguishing fakes from genuine items highlights a lack of consumer knowledge or ineffective detection methods.

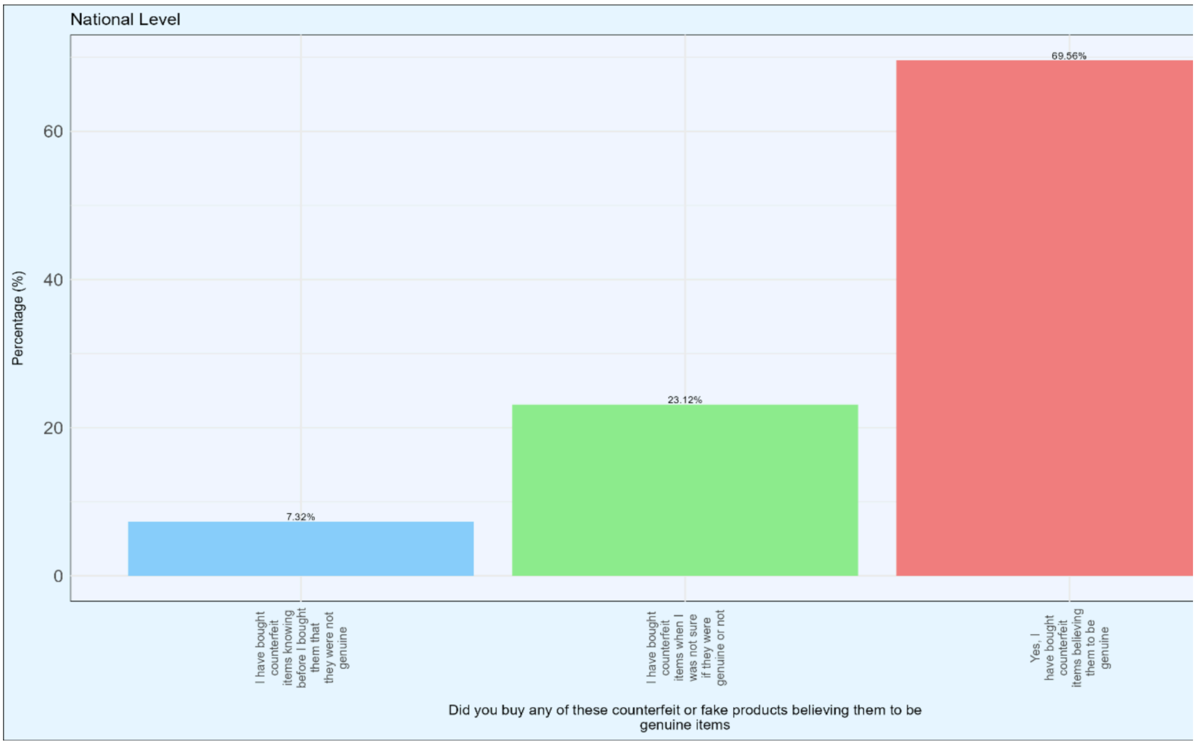

Figure 47: Consumers' Belief in the Authenticity of Counterfeit Goods Purchased

Additionally, 23.12% of respondents were unsure about the authenticity of their purchases, further emphasizing the need for improved consumer education on how to identify genuine products. Only 7.32% of respondents admitted to knowingly purchasing counterfeit goods, indicating that deliberate counterfeit purchases are relatively rare and low levels of non-deceptive consumption on the market.

The widespread adverse effects of counterfeit goods, such as health risks, financial loss, and shortened shelf life, make it clear that regulatory actions and consumer education efforts are necessary to empower consumers to make better-informed purchasing decisions.

3.4.2 Consumers' Willingness to Purchase Counterfeit Goods if Aware

A follow-up survey revealed that 86.43% of respondents stated they would not have purchased counterfeit items had they known they were fake, signalling a strong preference for genuine products and a negative perception of counterfeit goods. This suggests that consumer education initiatives have the potential to shift consumer behaviour toward authentic products.

However, 8.31% of respondents mentioned they would have purchased counterfeit items anyway, indicating that some consumers prioritize cost or accessibility over authenticity. Another 5.26% were unsure, representing a potential target group for awareness campaigns aimed at clarifying the risks and impacts of counterfeit products.

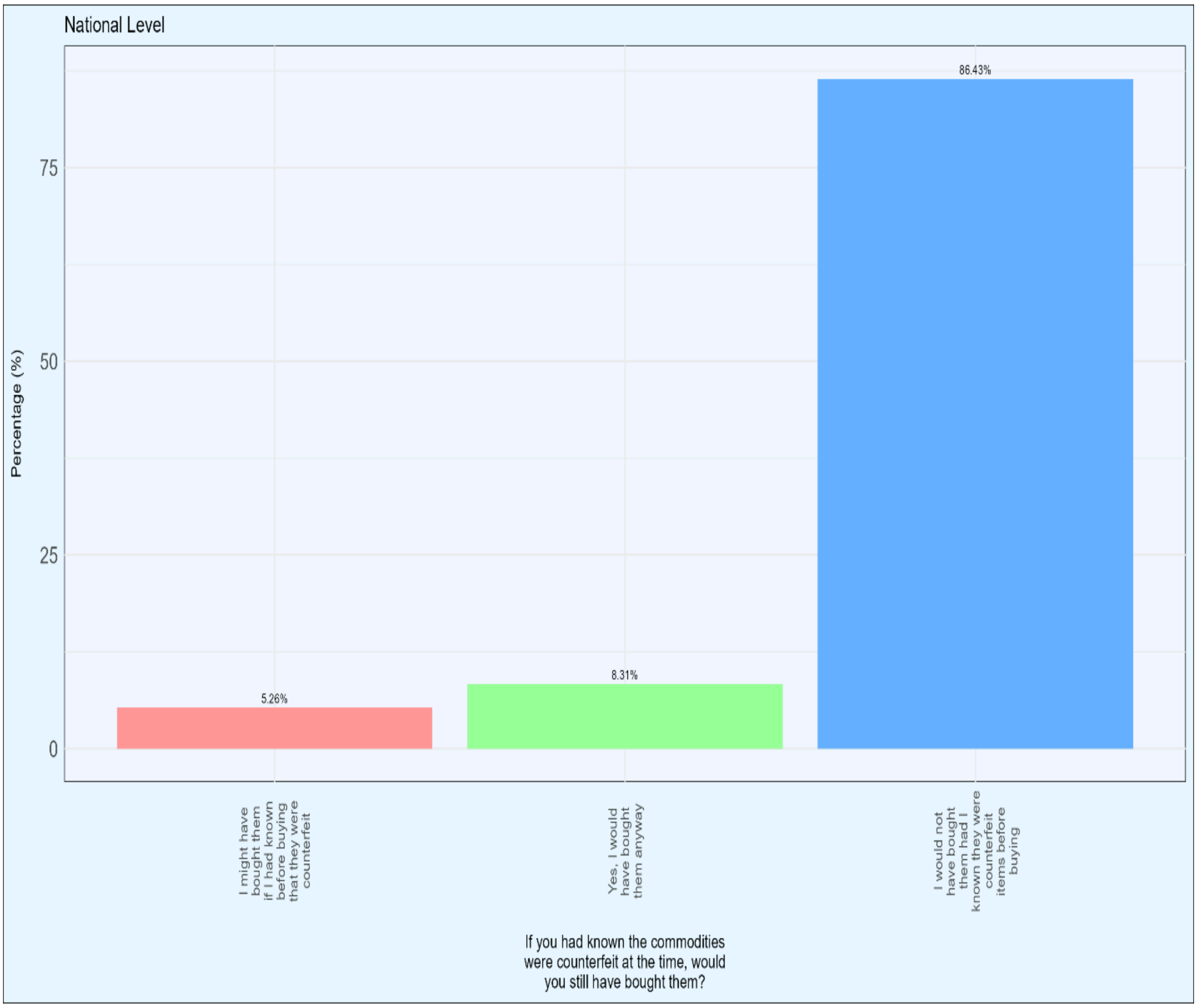

Figure 48: Consumers' Willingness to Purchase Counterfeit Goods if Aware

3.4.3 Reasons for Purchasing Counterfeit Goods Despite Knowing They Were Not Genuine

The follow-up question regarding why consumers knowingly purchase counterfeit goods despite their awareness of the items' lack of authenticity provides important insights into consumer behavior. The results reveal that 42.5% of respondents cited low prices as the primary motivator, indicating that cost remains a critical factor even when the authenticity of the products is questioned. This suggests that many consumers are willing to overlook potential risks associated with counterfeiting in favour of financial savings.

Additionally, 33.75% of respondents mentioned the easy availability of counterfeit products, reflecting a convenience factor that may overshadow concerns about quality or safety. Brand name recognition influenced 11.25% of respondents, demonstrating that the allure of familiar brand names, even when associated with counterfeit products, plays a role in purchase decisions.

Other reasons cited include product popularity (10%), and minimal mentions of product origin and warranty, each contributing to 1.25%. This suggests that quality concerns are less influential compared to the immediate benefits of low cost and accessibility.

The lack of significant reasons categorized under "other" implies that consumer behavior around counterfeiting is primarily driven by price and convenience, rather than long-term value or safety considerations. These findings suggest that consumer education efforts must not only focus on the risks of counterfeit products but also highlight the value of purchasing genuine items in relation to counterfeit alternatives.

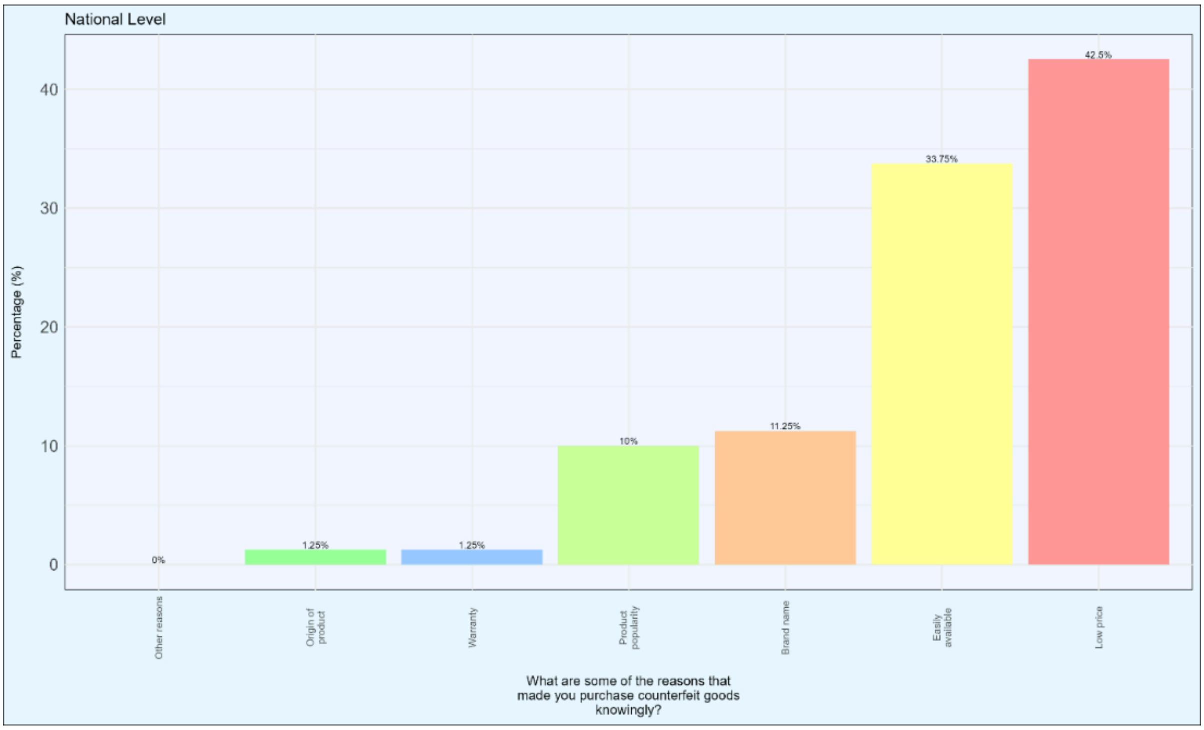

Figure 49:Reasons for Purchasing Counterfeit Goods Despite Knowing They Were Not Genuine

3.4.4 Reasons for Continuing to Buy Counterfeit Goods Despite Knowing They Are Fake

The study also explored why some consumers would continue to purchase counterfeit goods even after knowing they are not genuine. The results show that 43.69% of respondents continue to be motivated by low prices, reinforcing the idea that cost-saving is a primary driver in the decision-making process for many consumers.

Accessibility was cited by 26.21% of respondents, indicating that the ease of obtaining counterfeit goods remains an important factor in their purchasing decisions. Additionally, 13.59% mentioned brand recognition, suggesting that counterfeit versions of popular brands still appeal to some consumers.

Other factors such as product origin and warranty were mentioned by a smaller percentage of respondents, reflecting that these considerations are less significant in the decision to purchase counterfeit goods.

The normalization of counterfeit purchases reveals a mindset where cost and convenience take precedence over authenticity. This highlights the need for strategies to change consumer behavior, emphasizing both the risks of counterfeit products and the value of authentic items in order to shift preferences toward genuine products.

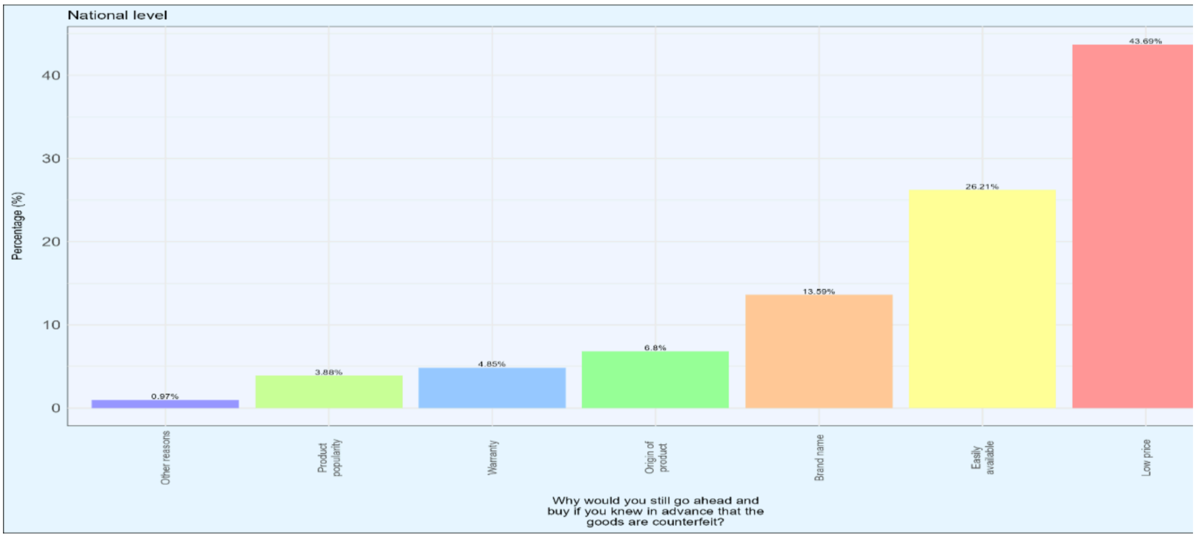

Figure 50: Reasons for Continuing to Buy Counterfeit Goods Despite Knowing They Are Fake

3.4.5 Consumer Perception of Health and Safety Risks Related to Counterfeit Products

The survey results regarding the likelihood of purchasing counterfeit products after being informed of their negative health and safety impacts reflect a cautious mindset among respondents. A substantial 33.96% indicated they would be "Very unlikely" to purchase counterfeit goods after learning about the risks, signalling a strong skepticism toward counterfeit products when health concerns are taken into account.

Additionally, 26.42% of respondents stated they were "Somewhat likely" to purchase counterfeit goods, while 20.75% were "Somewhat unlikely", indicating that many individuals remain conflicted and carefully weigh their options. 5.66% of respondents were undecided, illustrating the ambivalence some consumers feel when it comes to counterfeit products. Meanwhile, only 5.66% expressed that they would be "Very likely" to continue purchasing counterfeit goods despite the risks, suggesting that awareness of health and safety risks could deter a majority of buyers. These findings demonstrate a growing consumer awareness of the dangers associated with counterfeit products, with health and safety considerations becoming increasingly influential in shaping purchasing behavior.

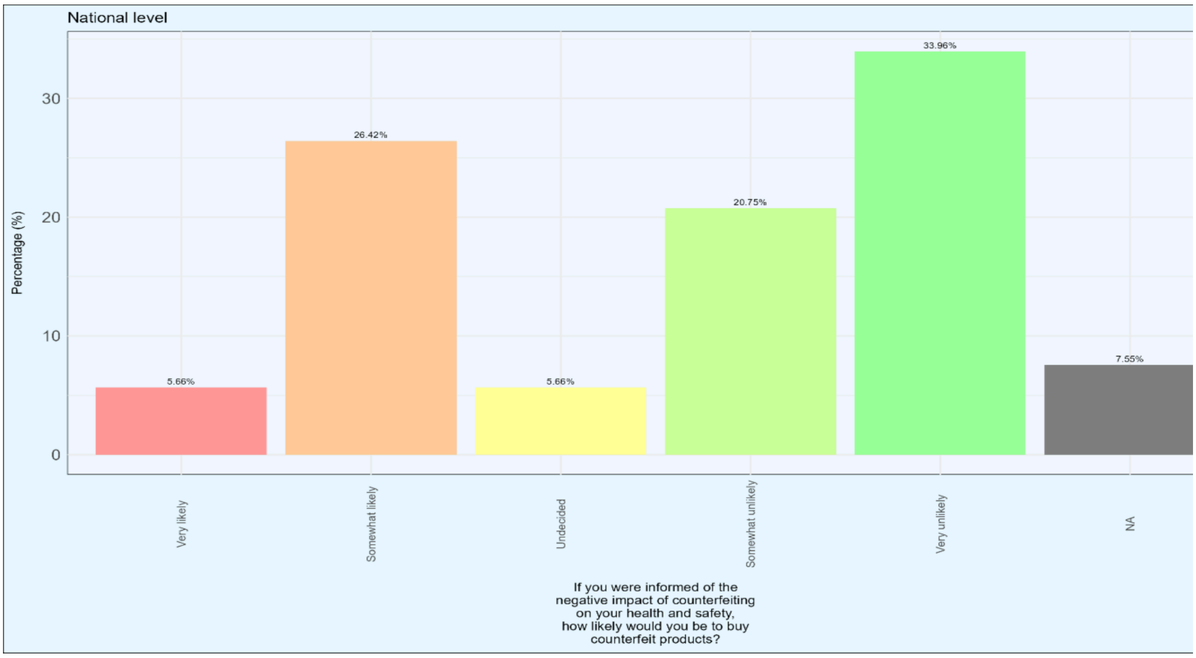

Figure 51: Likelihood of Purchasing Counterfeit Goods After Being Informed of Health and Safety Risks

3.4.6 Impact of Legal Awareness on Counterfeit Purchases

A survey examining the potential impact of legal consequences on the likelihood of purchasing counterfeit products revealed significant insights into consumer behavior. The results indicated that 43.40% of respondents would be "Very unlikely" to continue buying counterfeit products if they were informed of the legal ramifications, highlighting a strong awareness of the associated risks. This suggests that increasing legal awareness could serve as an effective deterrent against counterfeit purchases.

Conversely, only 1.89% of respondents stated that they would be "Very likely" to continue buying counterfeit products despite knowing the legal consequences, reflecting minimal disregard for the risks. Additionally, 20.75% of respondents were "Somewhat likely" to continue purchasing counterfeit goods, while 22.64% were "Somewhat unlikely," indicating a portion of consumers remains ambivalent or uncertain in their decisions. Furthermore, 11.32% of respondents were "Undecided," pointing to a need for further education and persuasive communication regarding the legal consequences of counterfeiting. These findings highlight the importance of targeted legal awareness campaigns to influence consumer behavior and reduce the demand for counterfeit products.

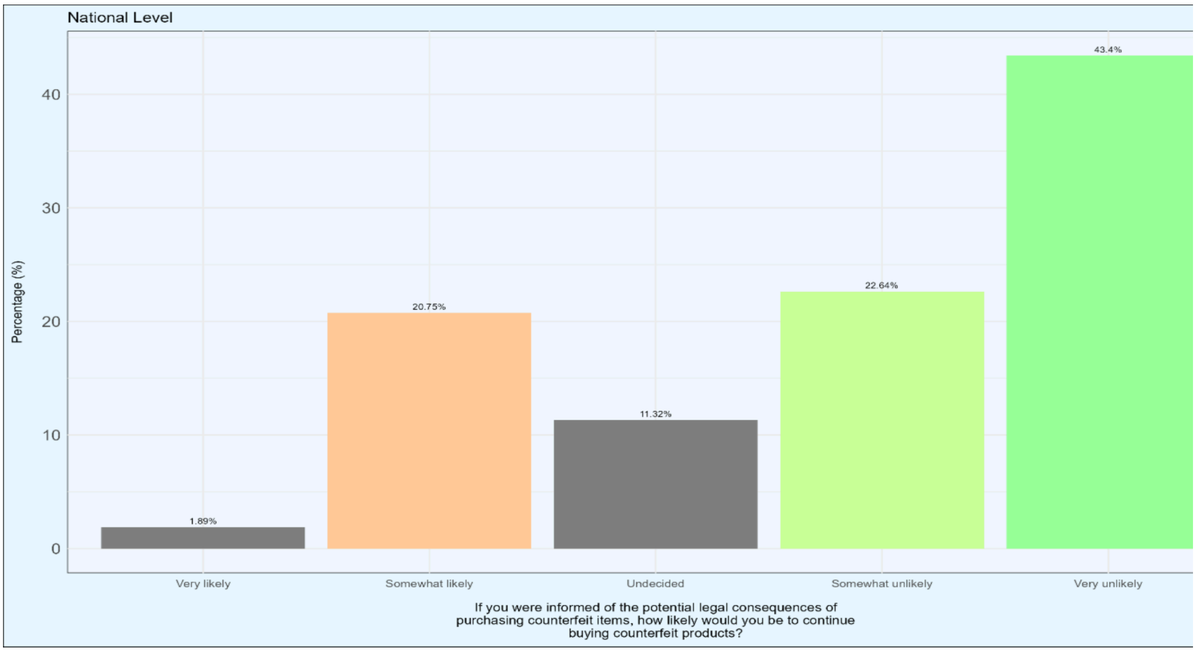

Figure 52:Impact of Legal Awareness on Counterfeit Purchases

3.4.7 Impact of Economic Awareness on Counterfeit Purchases

The survey also explored the influence of awareness about the negative effects of counterfeiting on the Kenyan economy. A significant portion of respondents (41.51%) indicated that they would be "Very unlikely" to continue purchasing counterfeit products if informed of the economic consequences. This reflects a strong understanding of the broader impact of counterfeiting on the national economy.

A smaller segment (3.77%) stated that they would be "Very likely" to continue buying counterfeit products, revealing that only a few individuals are willing to overlook the economic implications. The responses for "Somewhat likely" and "Somewhat unlikely" were closely matched, suggesting that some consumers remain conflicted or uncertain about their decisions, possibly balancing convenience or cost with ethical considerations. The undecided respondents (11.32%) present an opportunity for further education on the economic impacts of counterfeiting, underscoring the potential for consumer awareness campaigns to encourage more responsible purchasing decisions and support for legitimate businesses.

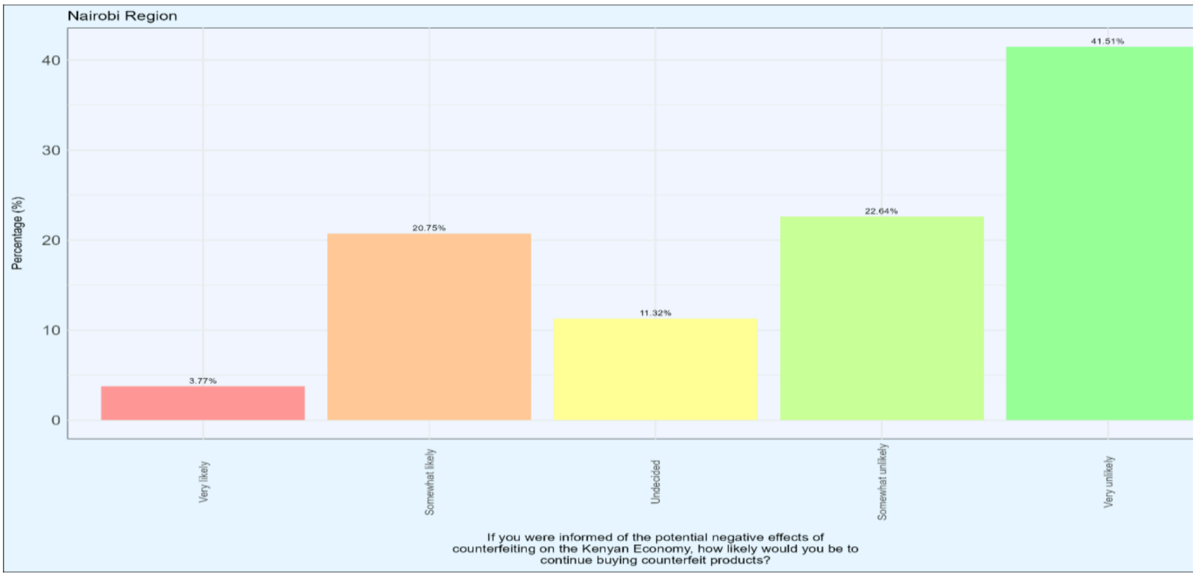

Figure 53: Impact of Economic Awareness on Counterfeit Purchases

3.5 Effectiveness of Anti-Counterfeit Campaign Strategies and Counterfeit Cases Reporting

3.5.1 Awareness of Anti-Counterfeit Campaigns

The survey assessed whether respondents had seen or heard any anti-counterfeit campaigns over the past 12 months. The findings revealed that 60.3% of respondents had not encountered such campaigns, while 39.7% indicated they had. This significant gap in awareness suggests that current anti-counterfeit initiatives are not reaching a large population segment. As a result, potential consumers may not be fully informed about the dangers posed by counterfeit products or the importance of supporting legitimate businesses.

To address this issue, targeted communication strategies should be developed. These could include the use of media platforms, community engagement activities, and educational programs tailored to different demographic groups. Understanding the characteristics of individuals who are aware of anti-counterfeit campaigns can further guide effective segmentation and targeting in future initiatives.

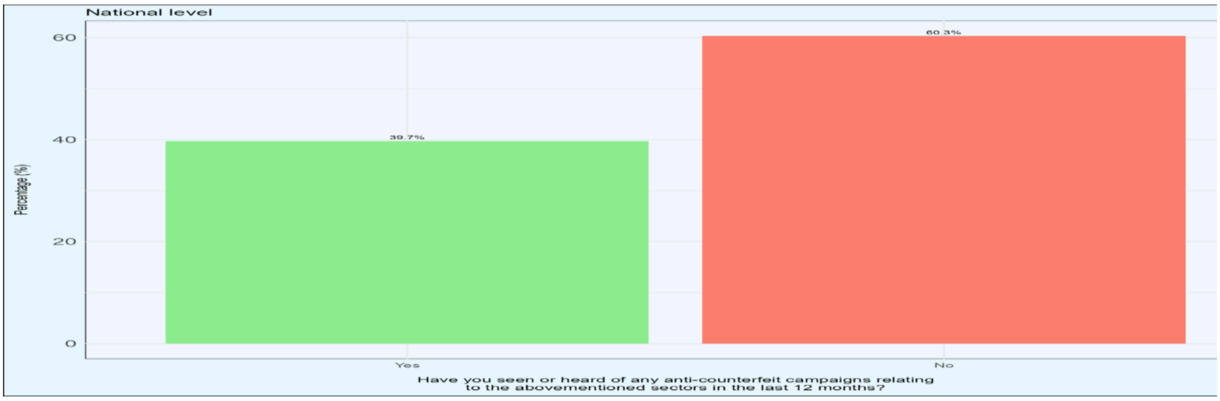

Figure 54: Awareness of Anti-Counterfeit Campaigns

3.5.2 County-Level Awareness Disparities

When comparing county-level data, notable variations were observed. For example:

- Busia reported relatively balanced awareness, with 52.3% of respondents stating they had heard of anti-counterfeit campaigns.
- Garissa showed the lowest awareness, with 89.8% of respondents unaware of any campaigns.
- Kisumu was more aligned with national averages, with 63.1% of respondents reporting no awareness.
- Machakos and Mombasa showed similar results, with 61.4% and 57.9% of respondents, respectively, unaware of such campaigns.

Other counties, including Nairobi, Nakuru, and Nyeri, also demonstrated lower levels of awareness, with over 50% of respondents in each county indicating they had not seen or heard any anti-counterfeit campaigns. These findings underscore the need for region-specific anti-counterfeit strategies that consider the unique challenges and awareness levels across different areas. Improved outreach in both urban and rural regions is necessary to enhance understanding and participation in combating counterfeit goods across Kenya.

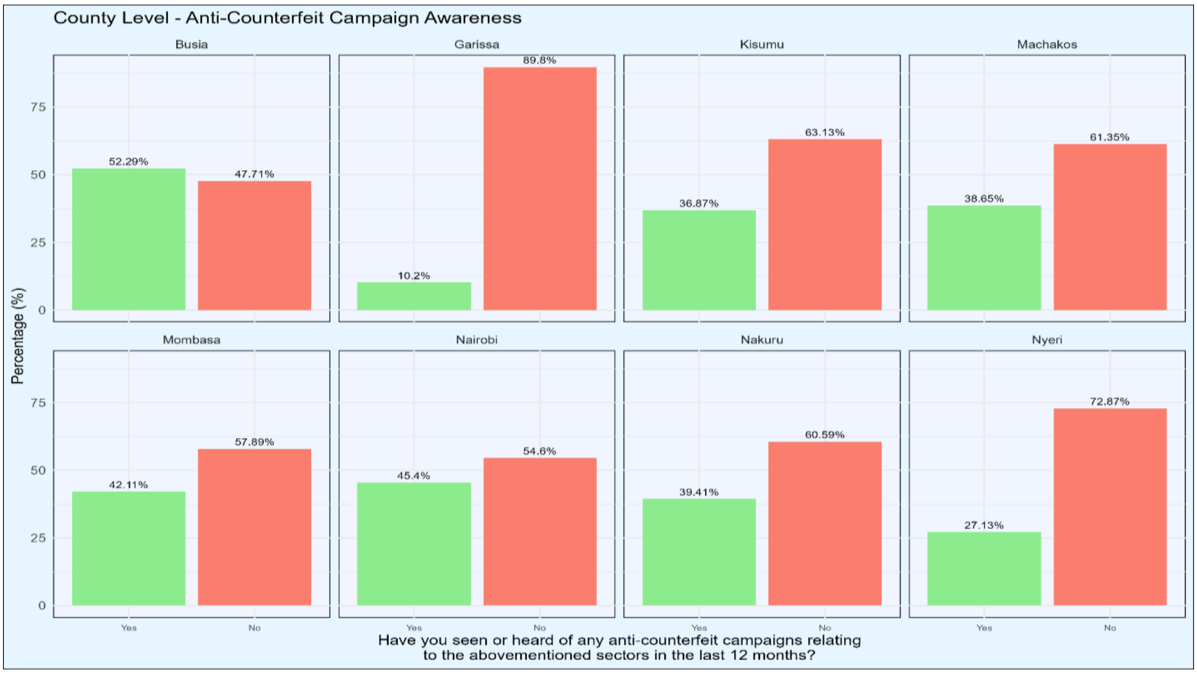

Figure 55:County-Level Awareness Disparities

3.5.3 Sources of Anti-Counterfeit Campaign Messages

Respondents were also asked about where they had encountered anti-counterfeit campaign messages. The study revealed that social media was the most impactful platform, with 65.5% of respondents citing it as their source of information. Television followed closely, with 54.6% reporting that they had seen anti-counterfeit messages on TV. Other notable sources included:

- National radio: 26.2%
- Vernacular radio: 19.6% (especially impactful in rural areas)
- Print media: 23.8%

Product packaging and labels accounted for 22.5% of awareness, while events and workshops had a relatively low impact, reaching only 14.2% of respondents. SMS/Text messages were the least effective, with only 9.33% of respondents citing this channel.

The dominance of social media and television as primary communication platforms suggests that future anti-counterfeit campaigns should prioritize these channels. Additionally, regional radio consumption should be considered, particularly in rural areas. Interactive and community-based approaches could also be explored to increase engagement and drive awareness of anti-counterfeit efforts.

	National level	
Where did you see or hear the anti-counterfeit campaign message?	Count	Percentage (%)
TV broadcast	486	54.61
National Radio	233	26.18
Vernacular radio	174	19.55
Social media	583	65.51
Print media- eg. Newspapers, etc	212	23.82
Events or workshops	126	14.16
Product packaging and labels	200	22.47
SMS/Text messages	83	9.33
Other	16	1.80

Figure 56:Sources of Anti-Counterfeit Campaign Messages

3.5.4 Perceived Effectiveness of Anti-Counterfeit Campaign Strategies

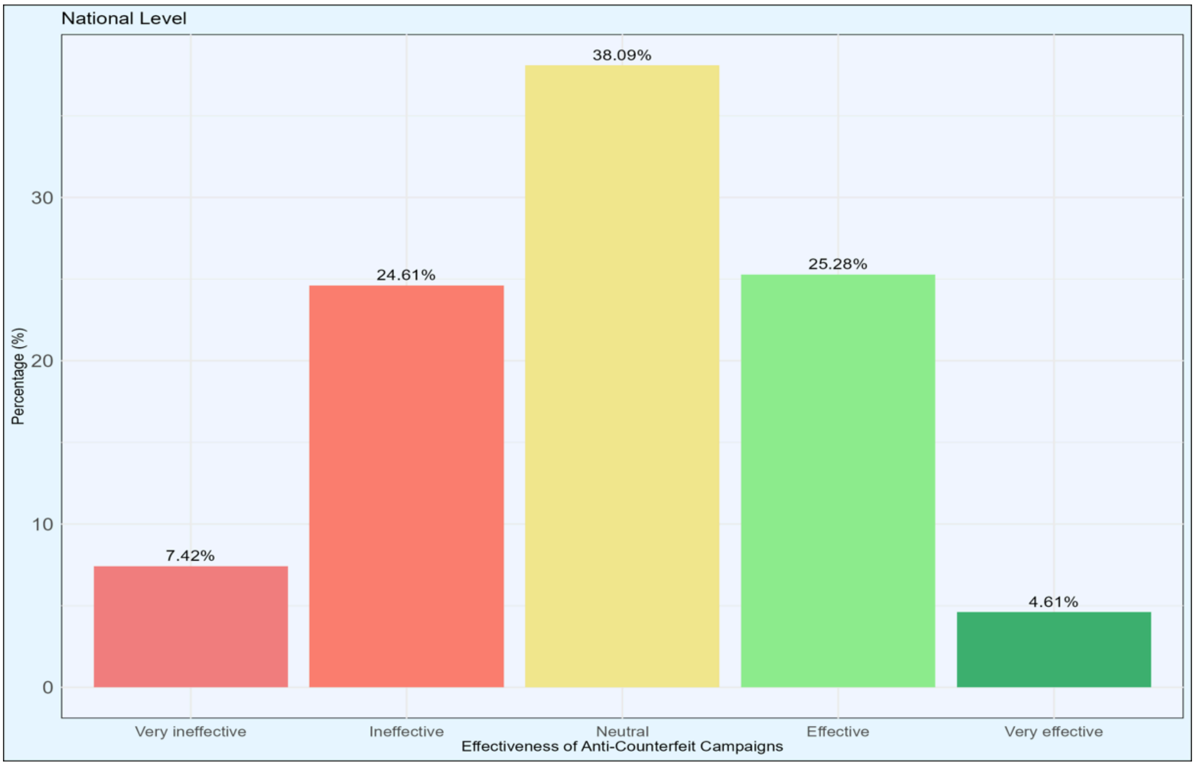

Figure 57: Perceived Effectiveness of Anti-Counterfeit Campaign Strategies

The survey asked respondents to rate the effectiveness of the strategies used by authorities to convey anti-counterfeit campaign messages. The results showed mixed reactions:

- 38.09% of respondents expressed a neutral stance, potentially reflecting a lack of engagement or awareness of the campaigns.
- 32.03% found the campaigns ineffective, highlighting a gap in communication and outreach strategies.
- 25.28% viewed the campaigns as effective, while only 4.61% considered them very effective.

Overall, 29.89% of respondents believed that the campaigns were either effective or very effective. However, this percentage is lower than the combined percentage of those who felt the campaigns were neutral or ineffective. These results suggest that while some people recognize the value of anti-counterfeit campaigns, a significant portion remains unconvinced.

To enhance the effectiveness of these campaigns, authorities may need to reassess their messaging approaches. Recommendations include:

- Increasing engagement efforts through more interactive and relatable content.
- Improving message clarity to ensure that the risks of counterfeit goods and the benefits of purchasing legitimate products are well understood.
- Utilizing diverse communication channels to reach a broader audience and foster greater awareness and participation in anti-counterfeit initiatives.

3.5.5 County-Level Effectiveness Variations

At the county level, the sentiment remained largely neutral. For example, Busia: 58.75% of respondents felt neutral about the campaigns, while only 13.75% considered them effective. Garissa and Kisumu similarly showed a majority of respondents rating the campaigns as ineffective or neutral, with 66.67% and 34.25% deeming them ineffective, respectively. Machakos, Mombasa, Nakuru, and Nyeri also exhibited mixed perceptions. In Nakuru, for instance, 53.06% of respondents felt neutral, while Nyeri had 25.71% rating the campaigns as ineffective.

The low percentage of respondents rating the campaigns as "very effective" (4.61% nationally) and the relatively high ineffective ratings in counties like Kisumu and Nyeri suggest that the campaigns are not resonating well with the public. Adjusting the campaigns to better engage with local communities and addressing their specific needs and concerns could improve effectiveness.

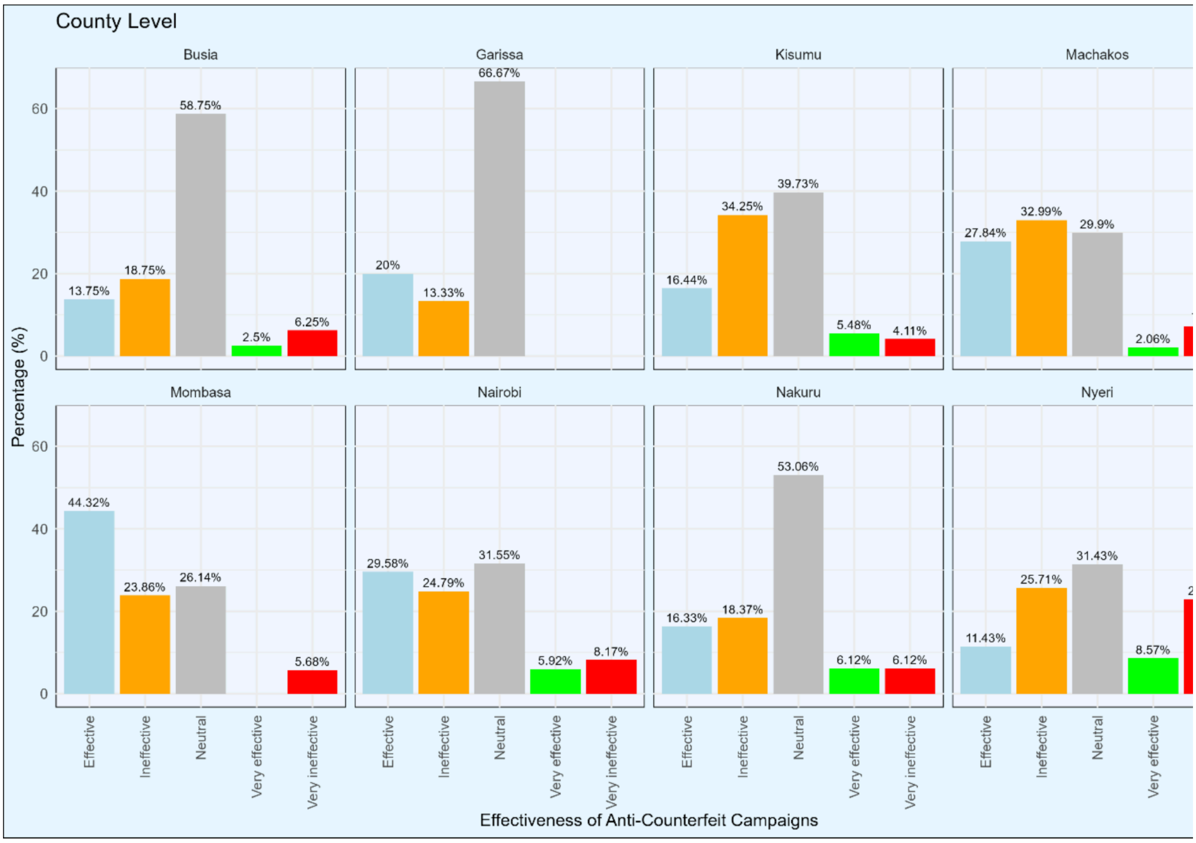

Figure 58: County-Level Effectiveness Variations

3.5.6 Reporting of Counterfeit Goods

A significant majority (94.34%) of respondents reported that they had not reported the sale of counterfeit goods to authorities or relevant organizations within the past 12 months. This lack of reporting may reflect;

- A lack of awareness about the proper reporting channels.
- Doubts about the effectiveness of authorities in addressing counterfeit issues.
- A general sense of helplessness or apathy toward combating counterfeit sales.

This low reporting rate points to the need for enhanced public education on the importance of reporting counterfeit goods. Authorities and relevant organizations should also work to improve public trust by ensuring that reports are taken seriously and acted upon promptly.

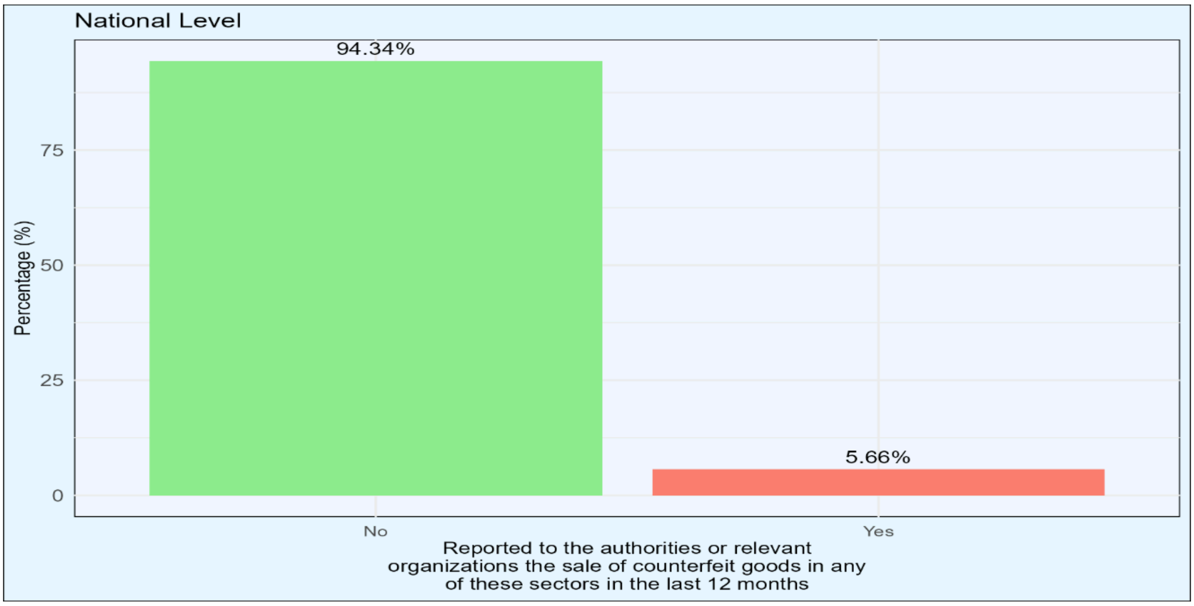

Figure 59:Reporting of Counterfeit Goods

3.5.7 County-Level Reporting Trends

The study revealed a significant underreporting of counterfeit goods across various counties. In Busia, Mombasa, and Nyeri, for example, most respondents did not report counterfeit sales. While Garissa and Nairobi showed slightly higher levels of engagement, the rates remained below the national average of 5.66%.

These results suggest that targeted public awareness campaigns are needed to improve reporting rates. Engaging with local communities and promoting clear reporting mechanisms could increase public participation in efforts to combat counterfeit goods.

Figure 60:County-Level Reporting Trends

3.5.8 Methods of Reporting Counterfeit Goods

Among the 5.66% of respondents who had reported counterfeit goods, websites emerged as the most commonly used reporting channel (23.08%). This was followed by phone calls or hotlines (20.36%) and social media (19.91%). In-person (walk-in) and email reporting were equally used (14.93%), while letters and other channels were less common.

These findings reflect a growing reliance on digital platforms for reporting counterfeit cases. To improve effectiveness, anti-counterfeit strategies should focus on enhancing online and mobile reporting options, making the process more accessible and user-friendly.

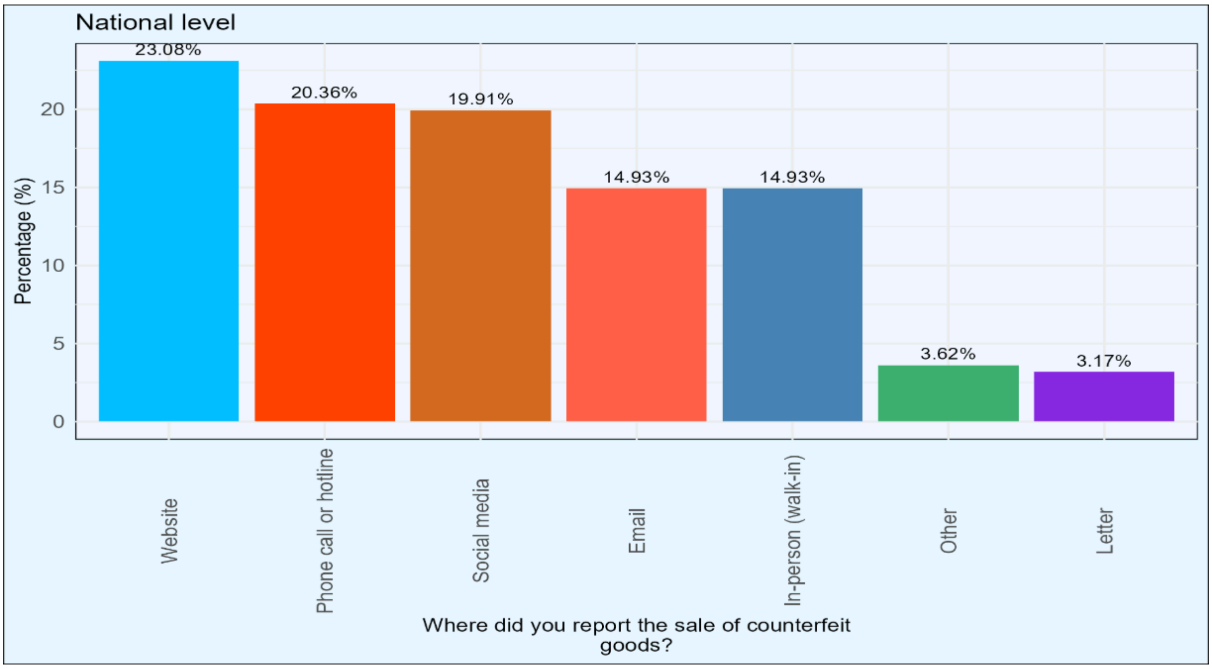

Figure 61: Methods of Reporting Counterfeit Goods

3.5.9 Reporting Agencies for Counterfeit Goods

When asked which organizations or government agencies respondents reported counterfeit cases to, the Kenya Bureau of Standards (KEBS) received the most reports (18.5%). Other significant agencies included the National Police Service (14%) and sector-specific bodies such as the Pharmacy and Poisons Board (7.5%) and the Anti-Counterfeit Authority (ACA) (5%).

However, the high percentage of reports categorized as "Others" (17%) suggests confusion or a lack of clarity regarding the appropriate authorities for specific counterfeit cases. Notably, no reports were made to the Kenya Veterinary Board (KVB), highlighting either low reporting in certain sectors or limited public knowledge about where to direct complaints.

These findings underscore the importance of increasing public awareness about the relevant sector-specific reporting channels. Simplifying the reporting process and improving coordination between key agencies, such as KEBS, ACA, and law enforcement bodies, can help ensure better coverage and response to counterfeit cases.

National Summary

To which organization or government agencies did you report the cases of counterfeiting?	Count	Percentage (%)
Kenya Bureau of Standards (KEBS)	37	18.5
Others	34	17.0
The National Police Service	28	14.0
Pharmacy and Poisons Board	15	7.5
Kenya Seed Company	10	5.0
Anti-Counterfeit Authority (ACA)	10	5.0
Pest Control Products Board	9	4.5
Kenya Copyright Board (KeCoBo)	9	4.5
Kenya Revenue Authority (KRA)	9	4.5
Kenya Film Commission	8	4.0

Figure 62:Reporting Agencies for Counterfeit Goods

3.5.10 Informal Reporting Channels

In addition to formal reporting channels, many respondents indicated that they reported counterfeit goods through informal networks, such as directly confronting sellers or raising concerns within their community. This approach is common in open markets and street vending environments. Some respondents also reported issues via online platforms such as Jumia or social media applications.

While informal reporting can serve as a useful initial step, encouraging the use of formal reporting mechanisms will help authorities track and address counterfeit cases more effectively. Promoting sector-specific reporting channels, such as farmers' associations or producers' organizations, could also increase reporting rates and improve overall anti-counterfeiting efforts.

Figure 63:Informal Reporting Channels

3.5.11 Satisfaction with Actions Taken by Authorities in Counterfeiting Cases

A survey was conducted to assess the satisfaction levels of individuals who reported cases of counterfeiting to relevant authorities or organizations. The findings show that 53.54% of respondents were satisfied with the actions taken by the authorities. However, 28.35% expressed dissatisfaction, and 18.11% reported partial satisfaction.

These results highlight areas where improvements are needed. Dissatisfied and partially satisfied respondents indicated the need for faster resolution, clearer communication, and more visible outcomes. Addressing these gaps could significantly enhance public trust in the reporting process, encouraging more individuals to report counterfeit cases and thereby strengthening anti-counterfeit enforcement strategies.

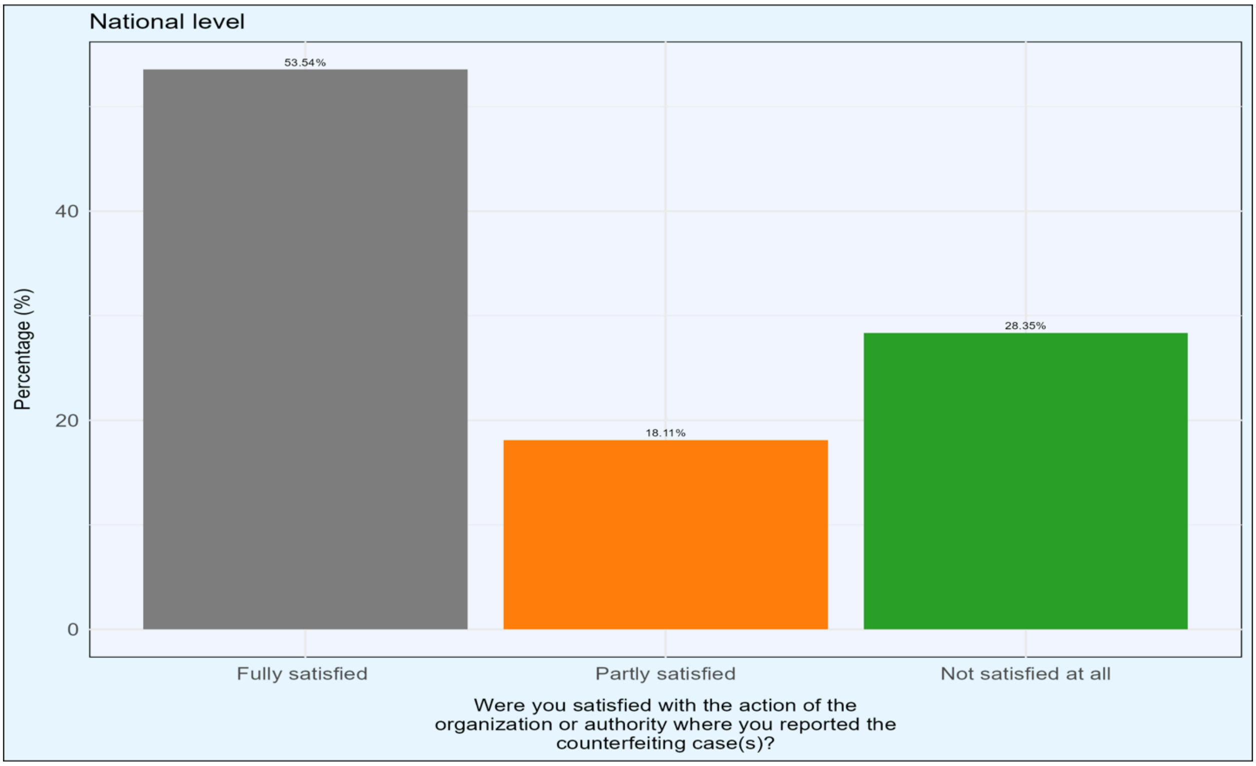

Figure 64:Satisfaction with Actions Taken by Authorities in Counterfeiting Cases

3.5.12 Reasons for Dissatisfaction with Actions Taken by Authorities

Respondents who were dissatisfied with the actions taken by authorities identified several key reasons for their dissatisfaction:

- **Insufficient action**: Many respondents felt that their cases were not taken seriously, with no significant steps taken to resolve the issues.
- **Lack of transparency and communication**: A recurring theme was the lack of feedback and updates after reports were made, leaving respondents feeling abandoned and frustrated.
- **Skepticism about the effectiveness of authorities**: Many respondents doubted the ability of authorities to combat counterfeiting effectively, citing that offenders often continue their activities unchecked.
- **Helplessness**: The feeling of helplessness was prevalent, with some respondents indicating that they felt powerless to stop counterfeit activities.

This feedback points to the need for authorities, particularly the Anti-Counterfeit Authority (ACA), to enhance their processes. By providing better feedback mechanisms, ensuring accountability, and demonstrating a genuine commitment to tackling counterfeiting, authorities can rebuild trust with the public and improve the effectiveness of their anti-counterfeit initiatives.

*Figure 65:*Reasons for Dissatisfaction with Actions Taken by Authorities

3.5.13 Partial Satisfaction with Actions Taken by Authorities

Respondents who expressed partial satisfaction with the actions taken by authorities also identified several areas where improvements are needed:

- **Perceived inadequacy of actions**: Many respondents felt that while some steps were taken, they were not sufficient to fully address the issue of counterfeiting.

- **Lack of timely feedback**: Immediate communication about the status of reported cases was a common request, with respondents seeking quicker responses from the authorities.
- **Transparency issues**: The complexity of the resolution processes and the lack of clear information about how cases were handled contributed to dissatisfaction.
- **Ongoing counterfeiting activities**: Some respondents were frustrated by the continued presence of counterfeit goods in the market, even after reporting cases to authorities.

To improve consumer satisfaction and strengthen anti-counterfeit campaigns, organizations and authorities should prioritize;

- **Timely action**: Swift and decisive measures to address reported cases.
- **Transparent communication**: Clear and frequent updates on the status of reported cases.
- **Streamlined feedback mechanisms**: A simplified and accessible reporting process that ensures respondents feel heard and informed.

By addressing these concerns, the Anti-Counterfeit Authority (ACA**)** can improve public confidence and encourage greater participation in reporting counterfeit activities.

Figure 66: Partial Satisfaction with Actions Taken by Authorities

3.5.14 Reasons for Not Reporting Counterfeit Cases

The survey also sought to understand why some respondents chose not to report counterfeit cases to authorities. Several reasons emerged;

- Lack of awareness of reporting agencies: 23.45% of respondents indicated they were unaware of which agencies to contact to report counterfeit activities.
- Unfamiliarity with the reporting process: 26.86% of respondents reported that they did not understand how to navigate the reporting process.

- Lack of trust in the system: A significant portion (36.08%) believed that reporting counterfeit cases would not lead to any action, reflecting skepticism about the authorities' effectiveness.
- Safety concerns: 5.48% of respondents were deterred from reporting due to concerns about their personal safety.
- Other personal reasons: 8.13% cited various personal reasons for not reporting counterfeit cases.

These findings suggest that to improve the reporting of counterfeit cases, authorities must focus on:

- **Raising awareness**: Educational campaigns should be conducted to inform the public about which agencies are responsible for handling counterfeit cases and how to report them.
- **Building trust**: Efforts should be made to demonstrate that reporting will lead to tangible results, thus increasing public confidence in the system.
- **Addressing safety concerns**: Assurances should be provided that individuals who report counterfeit activities will be protected.

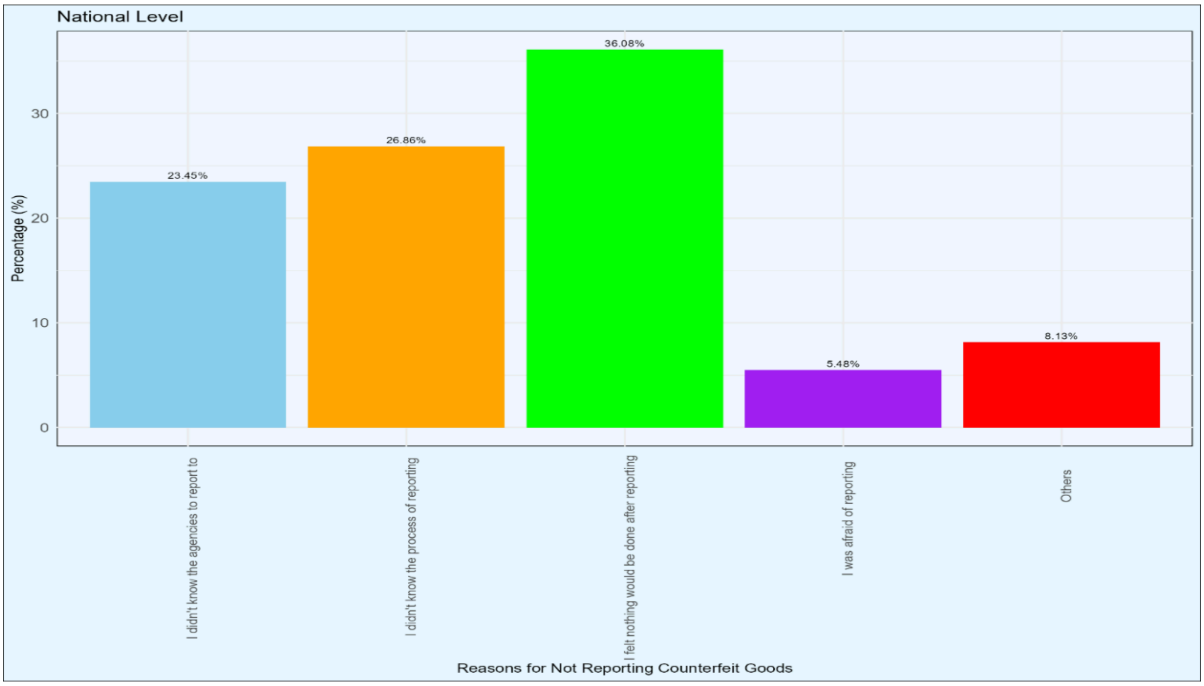

Figure 67:Reasons for Not Reporting Counterfeit Cases

3.5.15 County-Level Disparities in Reporting Awareness

The survey revealed county-level disparities in awareness and reporting of counterfeit cases. In Garissa, 56.06% of respondents reported being unaware of the appropriate agencies to contact. Machakos showed similar results, with 36.69% of respondents citing ignorance of reporting channels. In Busia, a significant 49.33% of respondents felt that reporting counterfeit cases would not result in meaningful action, followed by 41.93% in Nairobi.

These disparities indicate the need for region-specific outreach efforts. Anti-counterfeit campaigns should be tailored to address the specific challenges faced in different counties, particularly those with low awareness of reporting procedures and high skepticism about the effectiveness of authorities.

3.5.16 Reporting Channels for Counterfeit Cases

Of the 5.66% of respondents who reported counterfeit cases, the following channels were used:

- Websites: 23.08% of respondents utilized online platforms to report counterfeit cases.
- Phone calls or hotlines: 20.36% of respondents used telephone hotlines to make reports.
- Social media: 19.91% of respondents reported cases via social media platforms.
- In-person and email reporting: 14.93% of respondents reported cases either through walk-ins or email.

The increasing reliance on digital platforms for reporting suggests that future anti-counterfeit strategies should focus on enhancing online and mobile reporting options. Simplifying and promoting these channels could improve public participation and make it easier for individuals to report counterfeit activities.

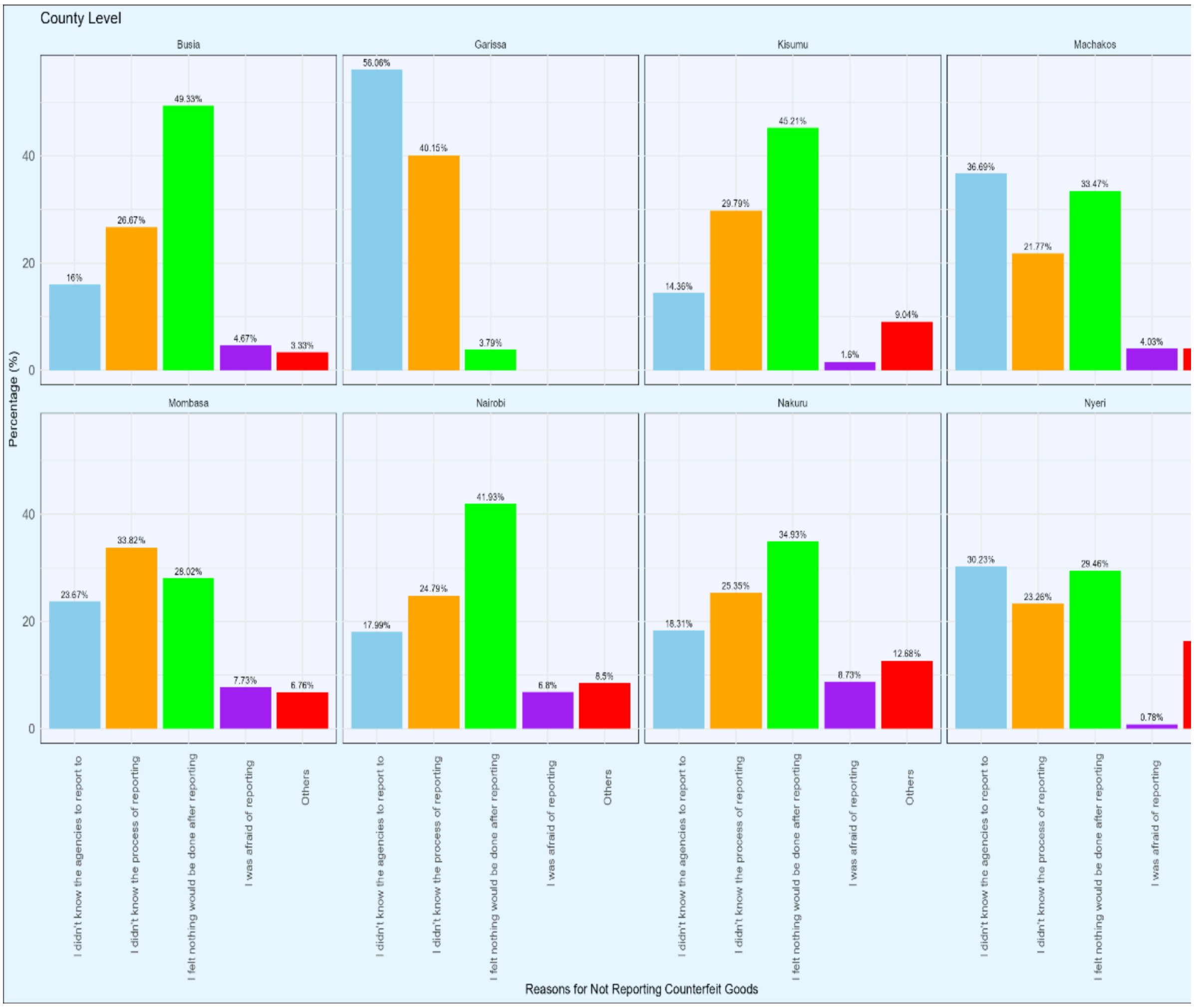

Figure 68: Reporting Channels for Counterfeit Cases

3.5.17 Reporting to Government and Sector-Specific Agencies

Respondents who reported counterfeit cases directed their complaints to several key organizations:

- Kenya Bureau of Standards (KEBS): The most commonly reported agency, receiving 18.5% of reports.
- National Police Service: 14% of reports were directed to the police.
- Sector-specific agencies, such as the Pharmacy and Poisons Board (7.5%) and the Anti-Counterfeit Authority (ACA) (5%), received fewer reports.

A significant number of reports (**17%**) fell under the "Others" category, suggesting confusion or a lack of clarity regarding the appropriate authorities for specific counterfeit cases. This reflects a need for better public awareness about which agencies handle counterfeit complaints across different sectors

3.5.18 Informal Reporting Channels

Many respondents indicated that they reported counterfeit goods through informal networks, such as confronting sellers directly or raising concerns within their community. These informal approaches are prevalent in open markets and street vending environments. Some respondents also used online platforms like Jumia or other social media applications to voice concerns.

While informal reporting can be helpful in alerting local sellers to counterfeit activities, formal reporting mechanisms are essential for authorities to track and take action against counterfeit goods. Encouraging the use of formal reporting processes will enable authorities to handle cases more effectively and hold counterfeiters accountable.

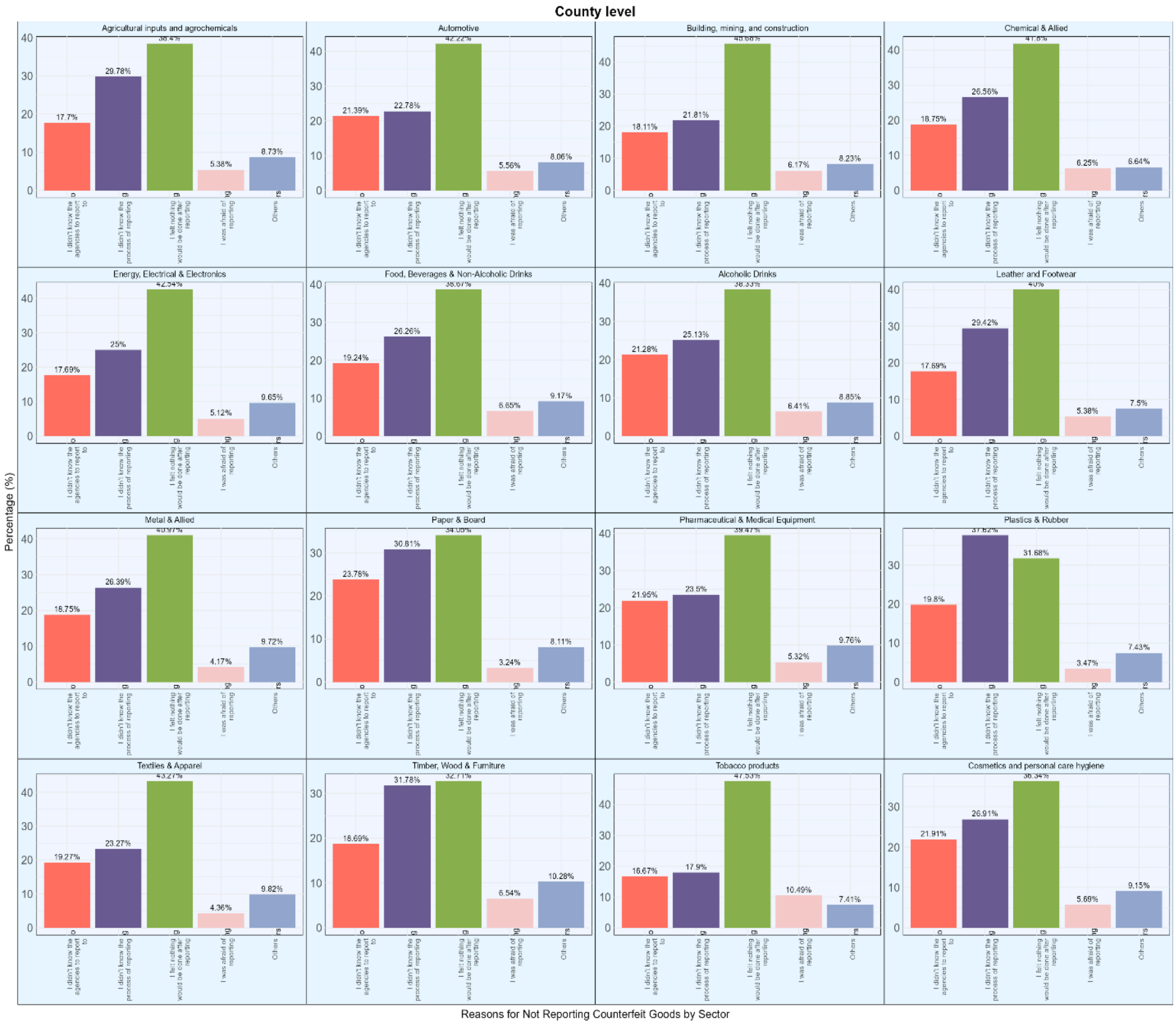

Figure 69: Informal Reporting Channels

3.6 Challenges Faced by Consumers in Counterfeiting Matters and Proposed Solutions

3.6.1 Challenges Faced by Consumers in Avoiding Counterfeit Goods

A survey was conducted to identify the challenges consumers face when trying to avoid counterfeit goods in the market. The results provide insight into the nationwide trends as well as county-specific data, highlighting regional differences in consumer experiences.

(a) **Identifying Genuine Products**: Nationally, 38.64% of respondents indicated that their biggest challenge is identifying genuine products. This issue was particularly pronounced in Busia (54.90%), Nyeri (47.09%), Machakos (46.82%), and Nairobi (37.90%). In contrast, Garissa reported a lower rate of 26.70%, suggesting that consumers in this county may either feel more confident in identifying genuine products or face other primary challenges.

(b) **Inadequate Information**: 22.96% of respondents cited a lack of information as a significant challenge. Counties such as Mombasa (29.78%), Nyeri (26.46%), and Garissa (24.95%) exceeded the national average, highlighting the need for greater consumer education in these regions. Machakos (17.73%) and Busia (20.39%), however, reported less concern about information availability.

(c) **High Prices of Genuine Products**: Pricing remains a significant issue, with 24.11% of respondents nationally expressing concern over the high cost of genuine goods. Counties like Garissa (27.57%), Kisumu (27.08%), and Mombasa (29.49%) showed heightened concern, while Busia (18.04%) and Machakos (15.00%) reported lower levels of price sensitivity.

(d) **Limited Availability of Genuine Goods**: 13.50% of respondents nationwide expressed difficulty accessing genuine goods. The issue was most prominent in Garissa (20.35%), Machakos (19.32%), and Nakuru (12.69%), suggesting a need for improved distribution and availability of authentic products. Busia (6.67%) and Kisumu (10.19%) showed lower levels of concern in this area.

(e) **Other Challenges**: A small percentage of respondents (0.79%) reported other challenges, with minimal responses in counties like Garissa (0.44%) and Mombasa (0.00%), suggesting that specific additional issues are not a widespread concern.

Figure 70:Challenges Faced by Consumers in Avoiding Counterfeit Goods

3.6.2 Sector-Specific Data on Challenges Experienced Avoiding Counterfeit Goods

Challenges faced by consumers in avoiding counterfeit goods were consistent across sectors. The most prominent issue remained the identification of genuine products (30%–39%), mirroring the national average of 38.64%. Inadequate information (21%–26%) and high prices (23%–27%) were also common concerns across industries. The limited availability of genuine goods showed more variation (12%–18%), while other challenges remained minimal, typically below 2%. These sector-specific insights reflect the broader national trends and emphasize the need for increased consumer education and easier access to genuine products.

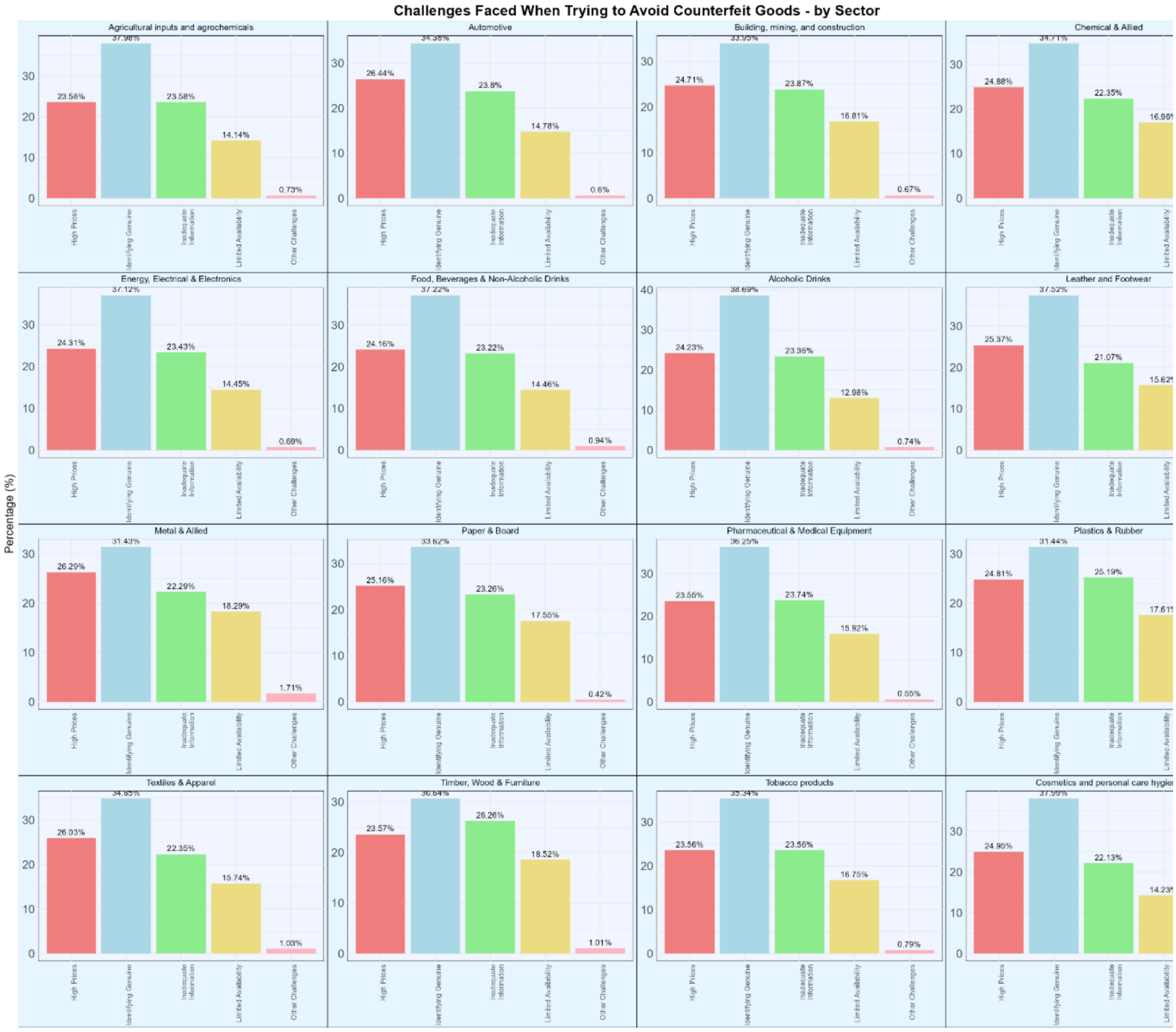

Figure 72: Challenges experienced when trying to avoid counterfeit goods by sector

3.6.3 Proposed Solutions to Avoid Counterfeit Goods

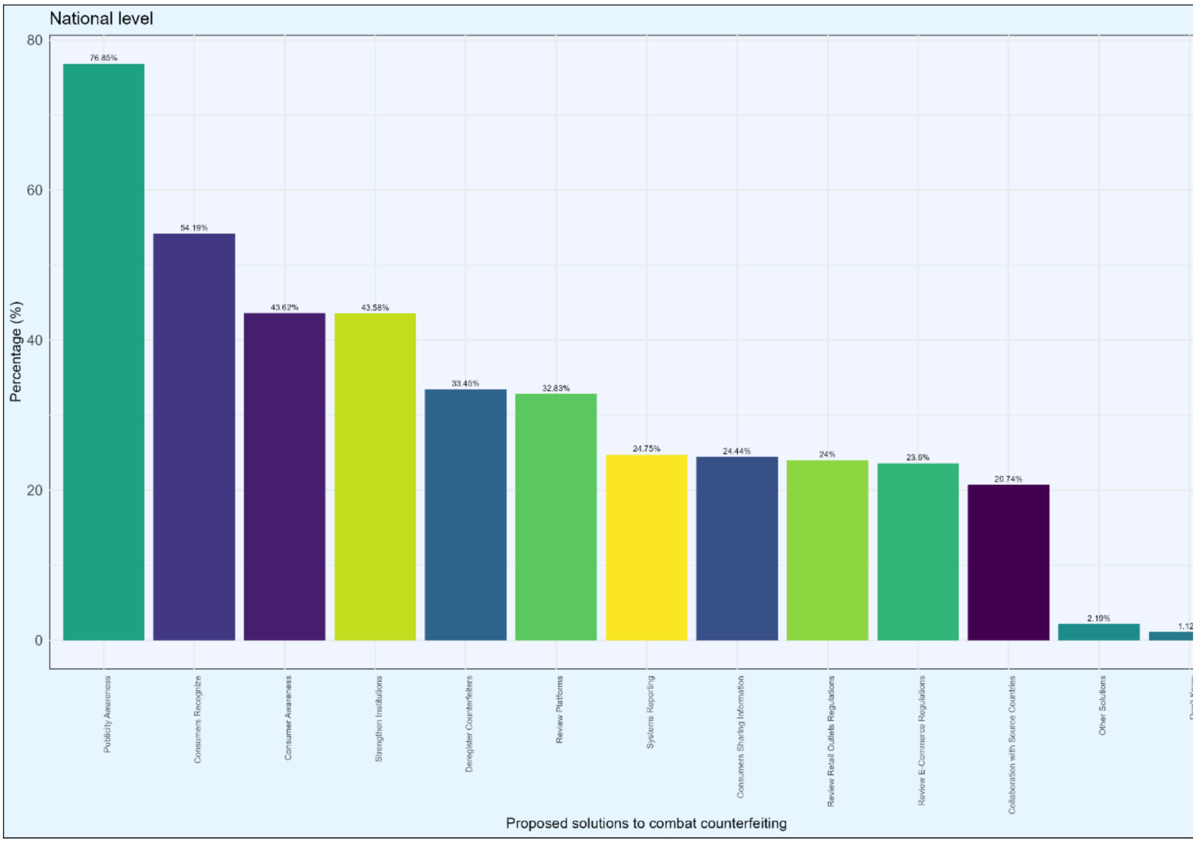

Figure 73: Proposed Solutions to Avoid Counterfeit Goods

The survey also explored solutions that could help consumers avoid counterfeit goods. The results show strong support for educational and recognition strategies, as well as regulatory reforms.

(a) **Public Awareness Campaigns**: A majority of respondents (76.85%) favored publicity awareness campaigns as the most effective solution. This highlights the critical need for widespread consumer education on the dangers of counterfeit goods and how to identify authentic products.

(b) **Empowering Consumers**: **54.19%** of respondents suggested that empowering consumers to recognize genuine products would be a crucial solution. This could involve providing tools or resources to help consumers differentiate between counterfeit and genuine goods.

(c) **Strengthening Institutions and Regulations**: There was significant support for regulatory interventions:

- 32.83% of respondents advocated for platform reviews to better regulate online and retail outlets.
- 33.45% supported deregistering counterfeiters, suggesting stricter penalties for those involved in the sale of counterfeit goods.
- Revising e-commerce and retail regulations was also seen as an important step in addressing the growing presence of counterfeit goods online.

(f) Information Sharing and Reporting: Respondents emphasized the importance of sharing information about counterfeit goods and establishing systems for reporting. These collaborative efforts between consumers, retailers, and authorities could play a crucial role in combating the counterfeit market. Interestingly, only 1.12% of respondents reported being unaware of any potential solutions, indicating that most consumers have clear ideas about how to address the counterfeit goods issue. These findings underscore the need for targeted awareness campaigns, regulatory reforms, and enhanced consumer empowerment to build a more informed and proactive consumer base.

3.6.4 Support Needed to Report Counterfeiting Cases

Respondents also shared their perspectives on the types of support they would need to effectively report counterfeiting cases. Several key areas emerged;

(a) ***Confidential Reporting***: The majority of respondents (64.18%) highlighted the need for **confidential reporting** mechanisms. This indicates that privacy and safety are significant concerns when reporting counterfeit activities.

(b) ***Education and Awareness****:* 64.90% of respondents emphasized the importance of **education and awareness** as a form of support, suggesting that consumers need more information about how to identify and report counterfeit goods.

(c) ***Support Services***: **37.60%** of respondents expressed a desire for support services to help them navigate the process of reporting counterfeit cases. This could include access to resources or guidance from consumer protection agencies.

(d) ***Training Workshops***: **35.15%** of respondents indicated a preference **for training workshops**, suggesting that hands-on learning opportunities could be valuable in helping consumers understand the risks of counterfeiting and how to avoid such products.

(e) ***Collaboration with Retailers**:* Surprisingly, only 13.92% of respondents felt that collaboration with retailers would be helpful in reporting counterfeits. This suggests a lack of trust or engagement with retailers on counterfeiting issues, an area that may require further exploration and improvement.

These findings reflect a clear desire for enhanced reporting mechanisms, more education, and greater support from authorities and consumer protection organizations. Implementing these support mechanisms could make it easier for consumers to report counterfeit goods and improve the overall effectiveness of anti-counterfeiting efforts.

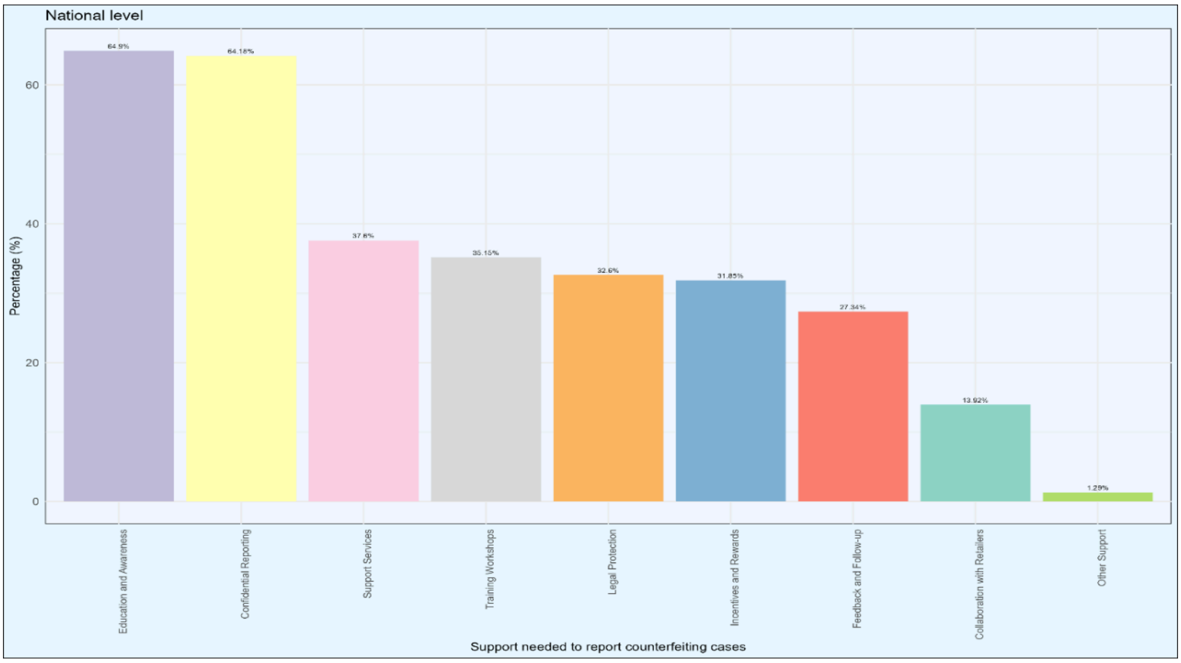

Figure 71:Support Needed to Report Counterfeiting Cases

3.7 Summary of Findings

Objective 1. Establishing Consumer Awareness Levels on Counterfeit Matters

a) General Awareness: The survey found a high level of awareness about counterfeit products averaging 83.85% reporting to have heard or seen the counterfeit product on the market, with Busia leading at 98%, followed closely by Machakos (90.8%) and Nairobi (88.9%). In contrast, Garissa (66.7%) and Mombasa (63.6%) showed lower awareness levels, highlighting the need for more targeted awareness campaigns in these areas.

b) **Sector-Specific Awareness**: Awareness was particularly high in the agricultural inputs and agrochemicals sector (39.52%), followed by alcoholic drinks (36.57%) and cosmetics (33.99%). Sectors like paper and board (8.97%) and timber (5.13%) exhibited significantly lower awareness, suggesting gaps in sector-specific education.

c) **Sources of Awareness**: The primary sources informing consumers about counterfeits were brand knowledge (70.87%) and advertisements (54.28%), while ACA forums had limited reach, impacting only 8.61% of respondents. This suggests that partnering with brands and leveraging advertising could be crucial in increasing awareness.

Objective 2. Establishing Consumer Experience in Buying Counterfeits (Offline and Online)

a) **Prevalence of Counterfeit Purchases**: The survey revealed that 60.48% of respondents admitted to purchasing counterfeit goods in the past 12 months, often unknowingly. Only 38.52% of respondents did not purchase counterfeits, highlighting the widespread nature of these products, and deceptive counterfeit consumption in the Kenyan markets

b) **Primary Sources of Counterfeit Goods**: Street sellers (59.37%) were the most common source of counterfeit products, followed by shops and kiosks (54.42%). Online platforms accounted for 31.27% of counterfeit purchases, showing the growing role of ecommerce in the counterfeit trade.

c) Sector-Specific Counterfeiting: Key sectors affected by counterfeit products included agriculture, where 89.16% of respondents identified pesticides, insecticides, and herbicides as frequently counterfeited. In the automotive sector, 81.89% of respondents pointed to four-wheeler spare parts as the most counterfeited items.

Objective 3. Establishing Consumer Mindset Change Against Counterfeiting

a) **Unintentional Purchases**: 69.56% of consumers unknowingly bought counterfeit products, underscoring the difficulty in distinguishing between genuine and fake items. 23.12% were unsure about the authenticity of their purchases, again heightening the role of the deceptive counterfeit consumption on the markets

b) **Change in Behavior**: When asked if they would continue purchasing counterfeits after learning about their negative impacts, 86.43% said they would not have bought the counterfeit items if they had known they were fake, while 8.31% admitted they would still have made the purchase. This is mainly driven by the price of the commodity.

c) **Motivations for Buying Counterfeits**: For those who knowingly bought counterfeit products, the primary reasons were low prices (42.5%), easy availability (33.75%), and the allure of familiar brand names (11.25%).

Objective 4. Determining Effective Anti-Counterfeit Campaign Strategies and Reporting

a) **Awareness of Anti-Counterfeit Campaigns**: A significant 60.3% of respondents had not seen or heard of any anti-counterfeit campaigns in the past year. Only 39.7% reported encountering such campaigns, revealing a need for more widespread outreach.

b) **Effectiveness of Campaigns**: Campaigns delivered through social media (65.5%) and TV (54.6%) had the highest reach, while SMS campaigns were much less effective, reaching only 9.33% of respondents. However, only 25.28% of respondents rated the campaigns as effective, with 32.03% deeming them ineffective.

c) **Reporting Counterfeits**: 94.34% of respondents did not report any counterfeit cases in the last 12 months, citing reasons such as not knowing the reporting process (26.86%) and feeling that reporting would not lead to any action (36.08%).

Objective 5. Identifying Solutions to Challenges Faced by Consumers on Counterfeiting

a) **Challenges in Avoiding Counterfeits**: The most significant challenge for consumers was identifying genuine products (38.64%), followed by high prices of authentic goods (24.11%), and inadequate information (22.96%) about how to spot fakes. Limited availability of genuine products was also an issue for 13.5% of respondents.

b) **Proposed Solutions**: The top recommendations for addressing these challenges included increasing public awareness campaigns (76.85%) and empowering consumers to recognize genuine products (54.19%). Additionally, strengthening institutional frameworks and ensuring confidential reporting mechanisms (64.18%) were seen as critical steps for encouraging more consumers to report counterfeits.

CHAPTER FOUR: CONCLUSION AND RECOMMENDATIONS

The findings of this study highlight critical challenges posed by counterfeit products in Kenya and the strategies required to mitigate them effectively. While consumer awareness of counterfeiting is relatively high at 83.85%, regional disparities persist, with Garissa (66.7%) and Mombasa (63.6%) trailing behind other counties. Sector-specific awareness is stronger in areas like agriculture, alcoholic drinks, and cosmetics but remains notably low in paper and board as well as timber. Awareness is predominantly driven by brand knowledge and advertisements, while ACA forums have limited outreach, underscoring the need for more innovative and targeted campaigns to bridge these gaps.

The prevalence of counterfeit purchases, with 60.48% of respondents acknowledging having bought counterfeit goods—often unknowingly—illustrates the widespread nature of the problem. Street sellers, kiosks, and shops dominate the distribution channels, with online platforms becoming an increasing concern. Counterfeiting significantly affects agriculture and automotive industries, with pesticides, herbicides, and spare parts being the most counterfeited products. These findings call for stricter monitoring and enhanced regulatory enforcement, particularly in these vulnerable sectors.

Although many consumers inadvertently purchase counterfeit products due to challenges in distinguishing genuine goods, 86.43% of respondents indicated they would avoid counterfeit products if better informed about their negative impacts. Price and affordability, however, remain key motivators for counterfeit purchases, indicating the need for strategies that address both consumer education and economic drivers. The high cost of authentic products further reinforces the necessity for affordable alternatives to counter the appeal of counterfeit goods.

Anti-counterfeit campaigns have not been sufficiently effective, with 60.3% of respondents reporting no exposure to such initiatives. While social media and television are the most widely accessed platforms, campaign effectiveness remains low, suggesting the need for more impactful and engaging strategies. Furthermore, reporting counterfeit goods remains minimal, with 94.34% of respondents not reporting such cases due to limited knowledge about reporting mechanisms and skepticism regarding follow-up action. Simplified reporting systems and efforts to build public trust in enforcement mechanisms are crucial for fostering consumer participation in the fight against counterfeiting.

Consumers face significant challenges, including difficulties in identifying genuine products, high prices for authentic goods, and limited knowledge on how to spot counterfeits. Addressing these challenges requires robust public awareness campaigns, consumer empowerment through tools like digital verification apps, and strengthened institutional frameworks for confidential and incentivized reporting. Collaboration among stakeholders—including government agencies, private sector actors, and consumer advocacy groups—is essential to create an environment that supports the availability of affordable, genuine products and curbs the proliferation of counterfeit goods.

In conclusion, combating counterfeiting in Kenya requires a comprehensive and multi-pronged approach. This includes targeted awareness campaigns tailored to low-awareness regions, leveraging popular media platforms, empowering consumers with tools and information to identify genuine goods, and implementing stronger regulatory frameworks. Stakeholder collaboration is crucial, involving partnerships with e-commerce platforms, manufacturers, and educational institutions to enhance consumer knowledge and enforce strict penalties against counterfeit trade. Additionally, increasing the accessibility of authentic products, particularly in underserved areas, and addressing affordability through subsidies or price adjustments will play a significant role in reducing counterfeit consumption. These efforts are vital for fostering a safer marketplace and protecting both consumers and legitimate businesses.

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APPENDICES

Appendix 1: Consumer-Level Survey Instrument

ACA_DRAFT_CONSUMER_LEVEL_SURVEY_AUG_2024

Hello, my name is [your name]. We are from the Anti-Counterfeit Authority (ACA) of Kenya. We are conducting a survey in [this region] to develop effective policies to combat counterfeit trade and improve livelihoods. This interview will take about 30 minutes. All the information we obtain will remain strictly confidential and anonymous. If you wish not to answer a question or wish to stop the interview at any time, please let me know. May I start now?*

[NAME OF ENUMERATOR]

Section 1: Demographic Information

(i) Age
- 18-24
- 25-29
- 30-34
- 35-39
- 40-44
- 45-49
- 50-54
- 55-59
- 60-64
- 65-69
- 70 and above

(ii) Sex
- Male
- Female

(iii) Education level (completed)
- None
- Primary
- Secondary
- Post-Secondary diploma/certificate
- Undergraduate Degree
- Post-graduate degree

(iv) Employment status
- Employed full-time
- Employed part-time
- Self-employed
- Student
- Homemaker
- Retired Unemployed
- Other (specify)

(v) County of residence

- Nairobi
- Mombasa
- Kisumu
- Machakos
- Nyeri
- Nakuru
- Busia
- Garissa

(vi) Sub-county (specify)

(vii) Consumer strata

1. Corporate offices
2. Hospitality industry (hotels, clubs, pubs)
3. Institutions of learning (schools, colleges and universities)
4. Beauty and grooming industry (salons, barbershops and spas)
5. Health facilities (hospitals, clinics and pharmacies)
6. Farmers (crop and animal husbandry)
7. Entertainment industry (music, art, etc)
8. Manufacturing industries (SMEs and well-established industries)
9. Supermarkets
10. Open-air garages
11. Bookshops

Section 2: To establish consumer awareness level on counterfeit matters

Q1 Please tell us if, in the last 12 months, you have seen counterfeit products from any of the sectors listed below. (Select all that apply) (The enumerator reads out the sectors)

- Agricultural inputs and agrochemicals
- Automotive
- Building, mining, and construction
- Chemical & Allied
- Energy, Electrical & Electronics
- Food, Beverages & Non-Alcoholic Drinks
- Alcoholic Drinks
- Leather and Footwear
- Metal & Allied
- Paper & Board
- Pharmaceutical & Medical Equipment
- Plastics & Rubber
- Textiles & Apparel
- Timber, Wood & Furniture
- Tobacco products
- Cosmetics and personal care hygiene

Q2. What are the most counterfeited goods in the sectors you have indicated above?

a.) Agricultural inputs and agrochemicals

- Pesticides, insecticides and herbicides

- Fertilizers and soil conditioners
- Animal feeds, medication, and supplements,
- Seeds
- Agricultural equipment and machinery
- Others (specify)

b.) Automotive

- Spare parts and accessories – e.g. tires, batteries, brake pads, engine parts, filters, spark plugs, lights, etc.
- Maintenance products – engine oil, coolants, transmission fluids, car wax, interior cleaners, etc.
- Customization products – performance exhaust systems, suspension kits, alloy wheels, etc
- Motorcycle parts
- Others (specify)

c.) Building, mining, and construction

- Cement, concrete paving blocks, clay roofing tiles, cement manufactured products
- Steel, iron sheets, etc
- Ballast, quarry machine-cut stones
- PPC/CPVC/PP pipes

d.) Chemical & Allied

- Paints and resins
- Form mattresses
- Adhesives and sealants
- Adhesives and sealants
- Industrial cleaning agents
- Air fresheners
- Water treatment chemicals

e.) Energy, Electrical & Electronics

- Petroleum products
- Energy generators- diesel, biofuel
- Solar panels
- Batteries- (e.g. lithium-ion, alkaline)
- Electric cables and wires
- Consumer electronics- e.g. smartphones, laptops
- Home appliances – e.g. refrigerators, washing machines, etc
- Smart home devices – e.g. security cameras, thermostats, etc.

f.) Food, Beverages & Non-Alcoholic Drinks

- Non-alcoholic beverages (e.g. Fruit based drinks, Flavored drinks, Carbonated soft drinks, Energy drinks, Cocoa drinks, Tea and coffee roasters, Bottled water)
- Baked products and other processed cereals (e.g. Bread, biscuits, cakes, baby food, breakfast cereals)
- Snack foods, confectionery, spreads, and condiments (e.g. Sweets, chocolates, chewing gums, crisps, nuts, honey and spices, jams, sauces, flavorings, preservatives)
- Milk and milk products
- Meat and fish products
- Edible oils

- Salts

g.) Alcoholic Drinks
- Wine
- Beer
- Distilled spirits
- Whisky
- Vodka
- Brandy
- Others (specify)

h.) Leather and Footwear
- Tanneries
- Shoes and other footwear
- Leather products

i.) Metal & Allied
- Smelting and hot rolling products e.g. reinforcement bars, angle irons, flat bars,
- Cold rolling products e.g. sheet color coating
- Wire product converter e.g. nails, bolts, nuts, barbed wire, binding wire, rivets, welding rods, etc
- Steel-fabricated products e.g. buildings, chairs, tanks
- Aluminum products e.g. utensils, plain sheets, roofing sheets,
- Tubes e.g. galvanized tubes, etc

j.) Paper & Board
- Pulp and recycled paper, bio-waste paper
- Packaging products (paper bags, cartons,)
- Paper articles (e.g. exercise books)

k.) Pharmaceutical & Medical Equipment
- Medication- antibiotics, anti-malaria drugs, anti-amoebic drugs, etc)
- Vaccines
- Medical equipment (crutches, walkers, orthopedic braces, wheelchairs, blood pressure monitors, etc)

l.) Plastics & Rubber
- Plastic packaging products (PET containers, blow moulded containers, PP woven and non-woven packaging products, etc)
- Non-woven PPP
- Plastic footwear
- Rubber products
- Plastic bottles

m.) Textiles & Apparel
- Clothing items for men
- Clothing items for women
- Clothing items for children
- Undergarments, swimsuits, etc
- Accessories (e.g. caps, umbrella, socks, gloves, and handbags)
- Carpets, towels, upholstery.

n.) Timber, Wood & Furniture
- Furniture, particle boards

- Wooden building materials (windows, doors, door frames, veneers, plywood, etc.)

o.) Tobacco products

- Cigarettes
- Cigars
- Pipe tobacco
- Roll-your-own tobacco
- Smokeless tobacco

p.) Cosmetics and personal care hygiene

- Personal care products – skin care products, toothpaste, shampoos, soaps, body washes, deodorants, antiperspirants, sanitizers, etc
- Artificial hair, hair care products, nail polish and removers, hair dyes, styling products, makeup products, etc
- Tissue products, diapers, sanitary towels

Q3. What are some of the sources that inform your ability to identify counterfeit products (select all that apply)

- Seminars
- Adverts
- ACA forums
- Brand knowledge
- Sensitization forums
- other (specify)

Q4. How confident are you in your ability to identify counterfeit goods in the sectors selected above? (Please rate on a scale from 1 to 5, where 1 is 'Not Confident' and 5 is 'Very Confident')

- Not confident
- Slightly confident
- Moderately confident
- Confident
- Very confident

Q5. Are you aware of the negative impact of counterfeiting on the Kenyan Economy?

- Yes
- No

Q6. If yes, how can counterfeiting adversely affect the Kenyan Economy (select all that apply) [do not prompt the respondent, tick below depending on the given response. To elicit more responses, you can ask what would happen to the Kenya Economy if counterfeiting is left unchecked]

- Loss of employment opportunity
- loss of investment opportunities
- loss of sales at the firm level and
- loss of Government revenue
- I don't know

- Other (specify)

Q7. Are you aware of any legal consequences of being involved (buying or selling) in the trade of counterfeit products?

- Yes
- No

Q8. If yes, what are some of the legal consequences of buying illicitly traded goods (select all that apply)? [Respondent to mention as the enumerator ticks appropriately]

- Fines or monetary penalties
- Imprisonment or jail time
- Confiscation of counterfeit goods
- Criminal record or legal charges
- Civil lawsuits from affected brands or manufacturers
- Others (specify)

Q9. What do you think the government should do to enhance awareness of counterfeiting?

(…………………………………………………)

Section 3: To establish consumer experience in buying counterfeits off and online

Q 10. In the last 12 months, have you personally, knowingly, or unknowingly, purchased counterfeit goods from the sectors chosen above?

- Yes
- No

Q11. You said that you have bought counterfeit versions of various commodities in the sectors mentioned earlier. Could you please tell us all the places you have bought them from in the last 12 months? (Mark all that apply) [Enumerator to read out and tick accordingly]

- Online platforms
- Street seller, mobile salesperson visiting office or doorstep at home
- Shops, kiosks
- Supermarkets, self-selection stores
- Other spaces (specify)

Q12. What percentage of all the counterfeit goods you bought were sold online?

- Less than 10%
- 10%-20%
- 20%-30%
- More than 30%

Q 13. How often do you purchase goods/items online in the sectors listed above?

- Rarely (once a year or less)
- Occasionally (a few times a year)

- Sometimes (once a month)
- Frequently (a few times a month)
- Very frequently (once a week or more)

Q14. Were some of the counterfeit products bought online imported?

- Yes
- No

Q15: From which online platforms did you purchase the counterfeit commodities?

(---)

Q16. For the counterfeit goods you did not purchase from online platforms, were some of them imported?

- Yes
- No

Q17. About what percentage of these counterfeit goods not bought online were imported?

- Less than 10%
- 10%-20%
- 20%-30%
- More than 30%

Q18. From which countries did these counterfeit products come? (Enumerator to Record the sub-county name)

(---)

Q19. Have you personally experienced any adverse effects of counterfeit goods/products from the sectors selected above?

- Yes
- No

Q20. You have mentioned that you have personally experienced adverse effects of using counterfeit goods. Please mention some of these adverse effects. (Select all that apply) [Enumerator to allow the respondent to mention and tick appropriately]

- Hospitalization
- Unemployment
- Loss of property
- Disability
- Short shelf life
- Other (specify)

Q21. Are you aware of other people who have experienced some adverse effects of using counterfeit goods/products?

- Yes
- No

Q22. You mentioned that you know other people who have experienced adverse effects from using counterfeit goods. Please mention some of these adverse effects. (Select all that apply) [Enumerator to allow the respondent to mention]

- Hospitalization
- Unemployment
- Loss of property
- Disability
- Short shelf life
- Other (specify)

Section 4: To establish consumer change of mindset against counterfeiting

Q23. You said that you have bought some counterfeit goods in the past 12 months. Did you buy any of these counterfeit or fake products believing them to be genuine items?

- Yes, I have bought counterfeit items believing them to be genuine
- I have bought counterfeit items when I was not sure if they were genuine or not
- I have bought counterfeit items knowing before I bought them that they were not genuine
- I don't know

Q24. You said that you have previously bought counterfeit goods in the last 12 months believing them to be genuine. If you had known they were counterfeit at the time, would you still have bought them?

- Yes, I would have bought them anyway
- I might have bought them if I had known before buying that they were counterfeit
- I would not have bought them had I known they were counterfeit items before buying

Q25. You said that you have previously bought counterfeit goods in the last 12 months knowing before you bought them that they were not genuine. What are some of the reasons that made you to do so?

- Low price
- brand name
- low price
- easily available
- product popularity
- origin of product
- warranty
- other reasons (specify)

Q26. You said that you would still go ahead and buy counterfeit goods even after knowing beforehand that they are counterfeit. What are some of the reasons that would make you do so?

- Low price
- brand name
- low price
- easily available
- product popularity
- origin of product
- warranty
- other reasons (specify)

Q27. If you were informed of the negative impact of counterfeiting on your health and safety, how likely would you be to buy counterfeit products?

- Very likely
- Somewhat likely
- Undecided
- Somewhat unlikely
- Very unlikely

Q28. If you were informed of the potential legal consequences of purchasing counterfeit items, how likely would you be to continue buying counterfeit products?

- Very likely
- Somewhat likely
- Undecided
- Somewhat unlikely
- Very unlikely

Q29. If you were informed of the potential negative effects of counterfeiting on the Kenyan Economy, how likely would you be to continue buying counterfeit products? [Enumerator to mention the loss of jobs, loss of investment, loss of taxes, etc]

- Very likely
- Somewhat likely
- Undecided
- Somewhat unlikely
- Very unlikely

Section 5: To determine effective anti-counterfeit campaign strategies and counterfeit cases reporting

Q30. Have you come across any anti-counterfeit campaigns in the past year relating to the sectors indicated above?

- Yes
- No

Q31. Where did you see or hear the anti-counterfeit campaign message? (Select all that apply)?

- TV broadcast

- National Radio
- Vernacular radio
- Social media
- Print media- eg. Newspapers, etc
- Events or workshops
- Product packaging and labels
- SMS/Text messages
- Other (specify)

Q32. In your opinion, how effective are the strategies used by the authorities to pass anti-counterfeit campaign messages?

- Very ineffective
- Ineffective
- Neutral
- Effective
- Very effective

Q31. Have you reported to the authorities or relevant organizations the sale of counterfeit goods in any of these sectors in the last 12 months?

- Yes
- No

Q33. To which organization or government agencies did you report the cases of counterfeiting?

- Kenya Industrial Property Institute
- Pest Control Products Board
- The National Police Service
- Kenya Copyright Board
- Pharmacy and Poisons Board
- Kenya Bureau of Standards (KEBS)
- Kenya Plant Health Inspectorate Service
- Department of Weights and Measures
- Kenya Revenue Authority (KRA)
- Kenya Film Commission
- KECOBO
- Kenya Seed Company
- Anti-Counterfeit Authority (ACA)
- Others (specify)

Q34. Were you satisfied with the action of the organization or authority where you reported the counterfeiting case(s)?

- Fully satisfied
- Partly satisfies
- Not satisfied at all

Q35. You have indicated that you were not satisfied with the actions taken by the organization or authority where you reported the counterfeiting case(s). Can you please tell us why you were not satisfied with the actions taken by the organization or authority?

(---)

Q36. You have indicated that you were partly satisfied by the actions taken by the organization or authority where you reported the counterfeiting case(s). Can you please tell us why you were not fully satisfied with the actions taken by the organization or authority?

(---)

Q37. You have indicated that you did not report the cases of counterfeiting to the authorities or any organization. Could you please tell us why you did not report the cases?

- I did know the process of reporting
- I do not know the agencies to report to
- I feel nothing will be done after reporting
- I am afraid of reporting
- Others (specify)

Section 6: To identify solutions to challenges faced by consumers on counterfeiting matters

Q38. What challenges do you face when trying to avoid counterfeit goods in the market? (Select all that apply)

- Lack of information
- Difficulty in identifying genuine products
- High prices of genuine products
- Limited availability of genuine products
- Other (please specify)

Q39. What solutions do you think would help you avoid counterfeit goods in the market? (Select all that apply)

- Enhance publicity and awareness of counterfeited products
- Enhance ability of the consumers to recognize counterfeit products
- Review platforms used to build knowledge among consumers
- Bilateral collaboration with source countries
- Deregister companies manufacturing local counterfeits
- Review online retailing (e-commerce) regulations
- Review retail outlets (shops, kiosks, hawkers, etc) regulations
- Strengthen institutions (ACA, KRA, KBS, etc)
- Increase consumer awareness
- Enhance systems for reporting complaints and tracking actions
- Create or enhance a system of consumers sharing information with manufacturers
- Other (specify)

Q40. What support do you need to report counterfeiting cases? (select all that apply)

- Confidential reporting channels (e.g. anonymous reporting, secure online platforms, apps, etc)
- Incentives and rewards (e.g. recognition or financial programs)
- Education and awareness (e.g. guidance material, information campaigns)
- Support services (e.g. hotlines, help desks, etc)
- Legal protection (e.g. legal advice, protection from retaliation, etc)
- Feedback and follow-up (e.g. status updates of reported cases)
- Training, workshops, seminars, etc
- Collaboration with retailers

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Upholding Authenticity

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