



Product Spotlight: Films

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2. How can those working to combat illicit trade deter them?

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CONSUMER MOTIVATIONS TO BUY ILLICIT FILMS

The trade in illicit films is growing in all regions

Country	Estimated illicit trade	Growth
Austria	12.8%	2.8%
Belgium	13.0%	2.5%
France	13.2%	2.6%
Germany	14.9%	7.4%
Ireland	13.3%	0.6%
Luxembourg	13.6%	0.3%
Netherlands	14.3%	0.8%
Switzerland	12.2%	1.2%
United Kingdom	13.6%	3.3%
Western Europe	13.4%	2.4%

Country	Estimated illicit trade	Growth
Denmark	13.3%	2.2%
Finland	12.6%	-0.9%
Norway	14.1%	2.6%
Sweden	14.7%	1.5%
Nordics	13.7%	1.4%

Country	Estimated illicit trade	Growth
Bulgaria	13.1%	2.1%
Croatia	14.6%	7.4%
Czech Republic	14.7%	-0.2%
Estonia	12.1%	-1.2%
Latvia	13.5%	0.6%
Lithuania	13.3%	-0.7%
Slovakia	14.9%	4.6%
Slovenia	14.6%	3.0%
Hungary	16.0%	8.1%
Poland	13.6%	2.9%
Romania	13.6%	6.2%
Central/Eastern Europe	14.0%	3.0%

Country	Estimated illicit trade	Growth
Average all countries	14.2%	2.7%

Country	Estimated illicit trade	Growth
Azerbaijan	16.8%	9.9%
Belarus	15.3%	-4.2%
Kazakhstan	12.5%	1.2%
Russia	16.1%	-3.9%
Serbia	15.1%	6.6%
Turkey	18.2%	10.3%
Ukraine	17.5%	4.0%
Eastern borders (non EU)	15.9%	3.4%

Country	Estimated illicit trade	Growth
Cyprus	14.2%	3.0%
Greece	12.2%	2.0%
Italy	15.1%	5.3%
Malta	13.8%	0.0%
Portugal	13.5%	1.7%
Spain	15.6%	3.3%
Southern Europe	14.1%	2.6%



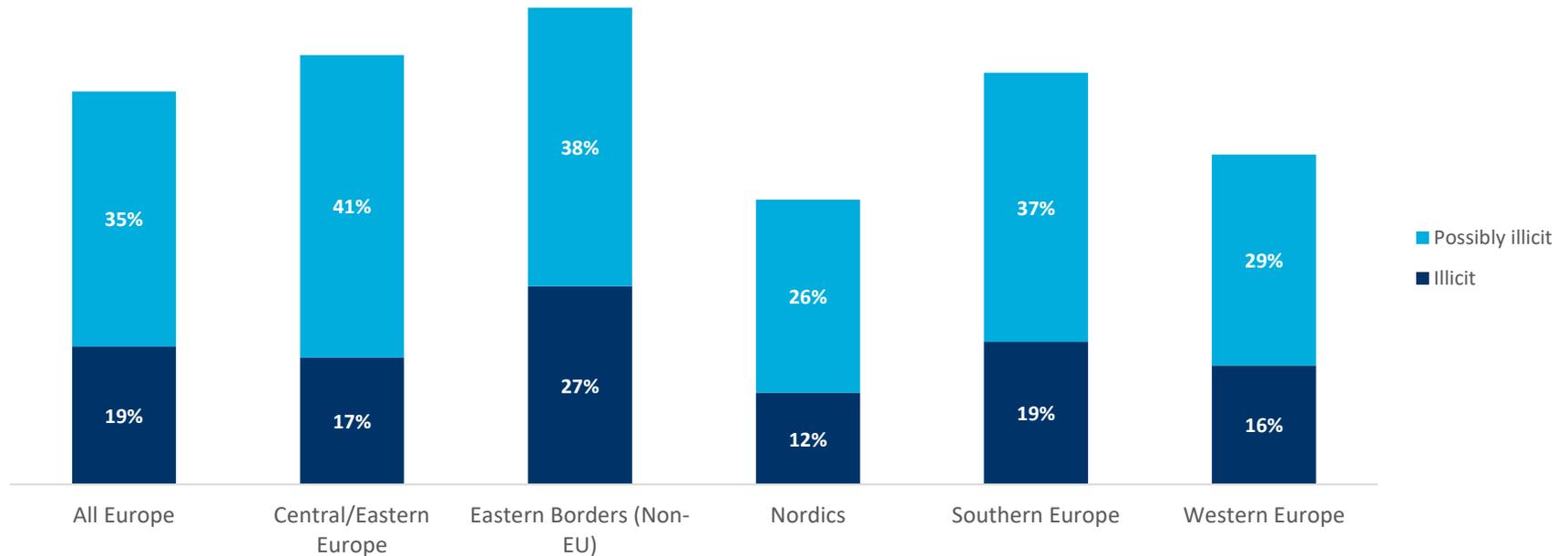
Source: Oxford Economics stakeholder survey, n=2,887

- The heatmap across 39 European countries highlights high levels of illicit films across Europe according to our respondents, from 12% in Estonia to 18% in Turkey, but variety in growth over the last three years (e.g., decrease of 4% in Belarus vs. increases in Azerbaijan and Turkey of 10%).
- Estimated growth in illicit trade reported over last three years in all European regions, despite some country exceptions.

Consumers indicate large amount of “possibly illicit” trade

In general how likely do you think that some of the products you have purchased could have been illicit goods?

Consumers

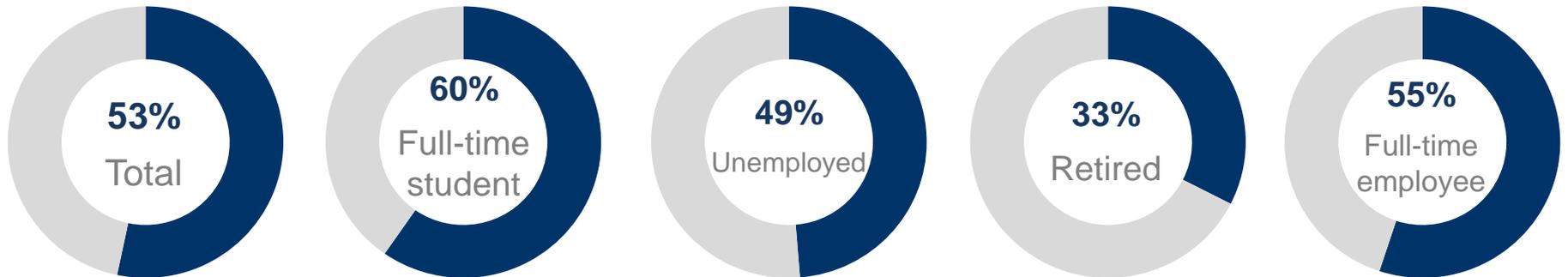


Source: Oxford Economics consumer survey, n=8,611

- Consumers’ estimates of illicit purchases highlight extent of “possibly illicit” purchases, where they lack confidence that they are buying legitimate films, music and video games (referred to throughout as films).
- Across Europe over a third (35%) of purchases are possibly illicit, much higher than estimated illicit purchases of 19%.
- For this presentation, to understand consumers motivations for buying illicit films, we use this larger population, including possibly illicit.

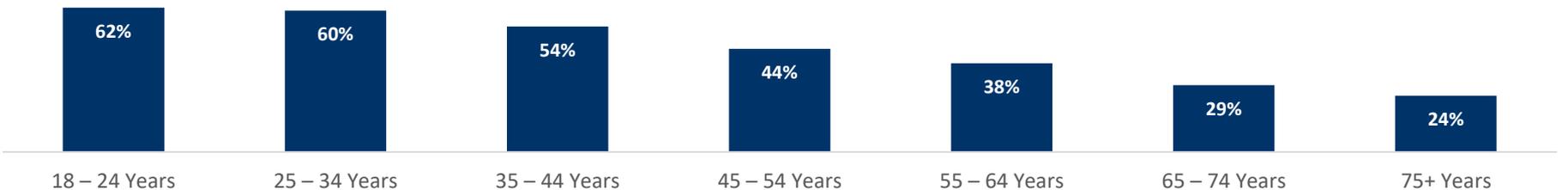
The young are more likely to buy illicit films

Percentage of illicit purchases by working role



Source: Oxford Economics consumer survey, n=8,611; Full-time student n=1,019; Unemployed n=583; Retired n=443; Full-time employee n=4,986

Percentage of total illicit purchases by consumer age

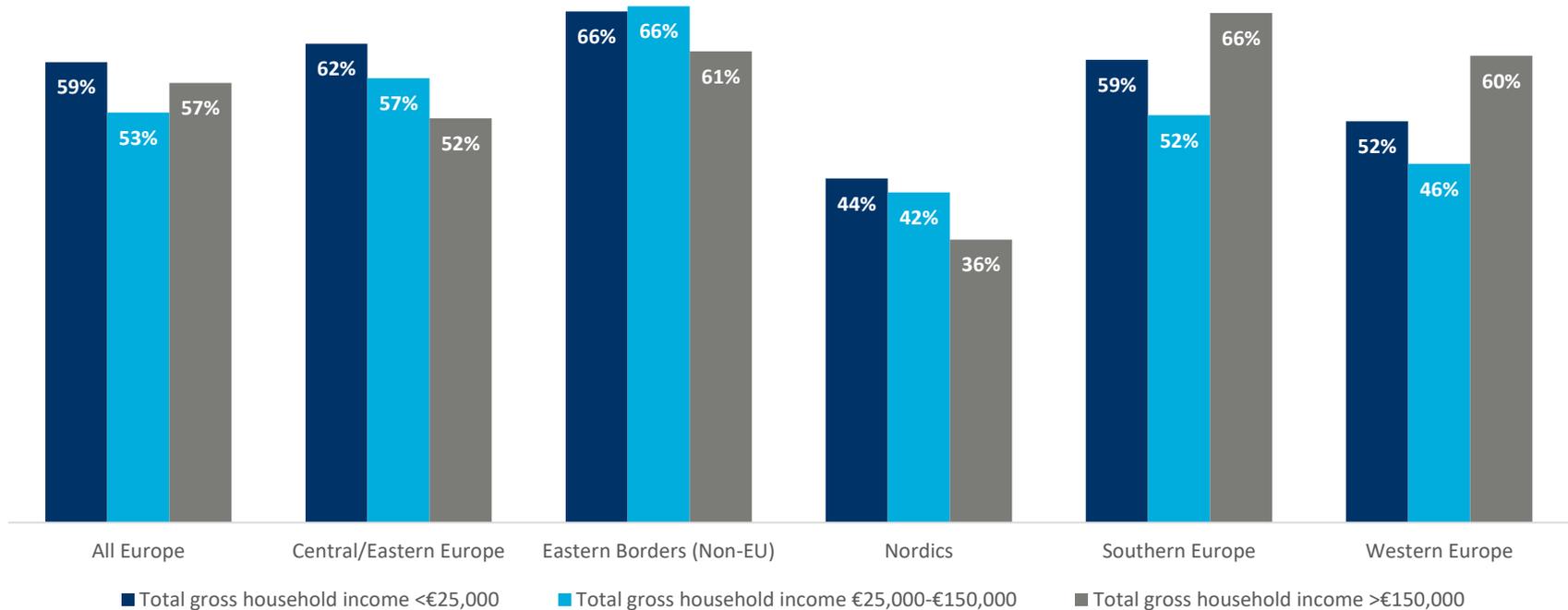


Source: Oxford Economics consumer survey, n=8,611; 18-24 n=1,375; 25-34 n=2,521; 35-44 n=2,294; 45-54 n=1,448; 55-64 n=752; 65-74 n=196; 75+ n=25

- The strongest correlation with respondents who regularly buy illicit films (at least monthly) is with age, as tendency to buy illicit decreases with age.
- The occupation stats reinforce that age appears to be a greater influence than income level.

Illicit films are not only bought by the poor

In general, how likely do you think that some of the products you have purchased could have been illicit goods?
Consumers



Source: Oxford Economics consumer survey, n=8,611 ; Total gross household income <€25,000 n=1,836; Total gross household income €25,000-€150,000 n=3,527; Total gross household income >€150,000 n=400

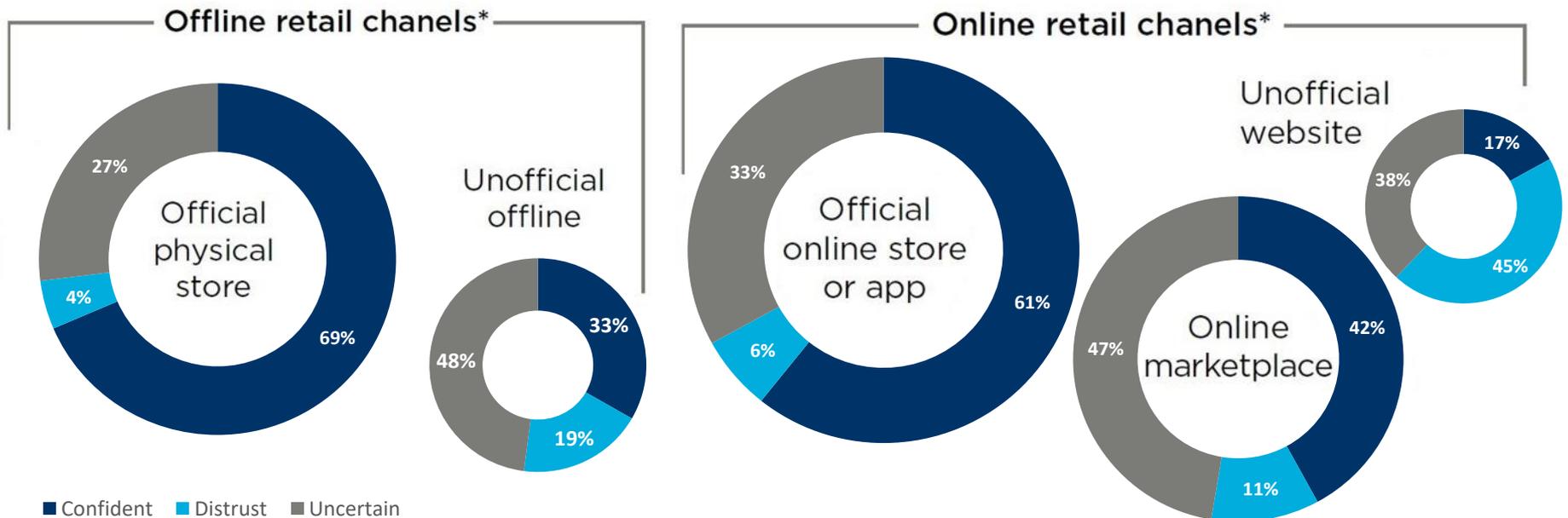
- The wealthy, earning > €150,000, are more likely to buy illicit films than other income groups in Southern Europe and Western Europe.
- Possible explanations include higher use of e-commerce and scepticism of official distribution channels.



WHY DO CONSUMERS BUY ILLICIT FILMS?

Consumers are unsure if online purchases are legitimate

For each of the different ways you may have bought goods, please rate your confidence that you were buying authentic and legitimate products
Consumers

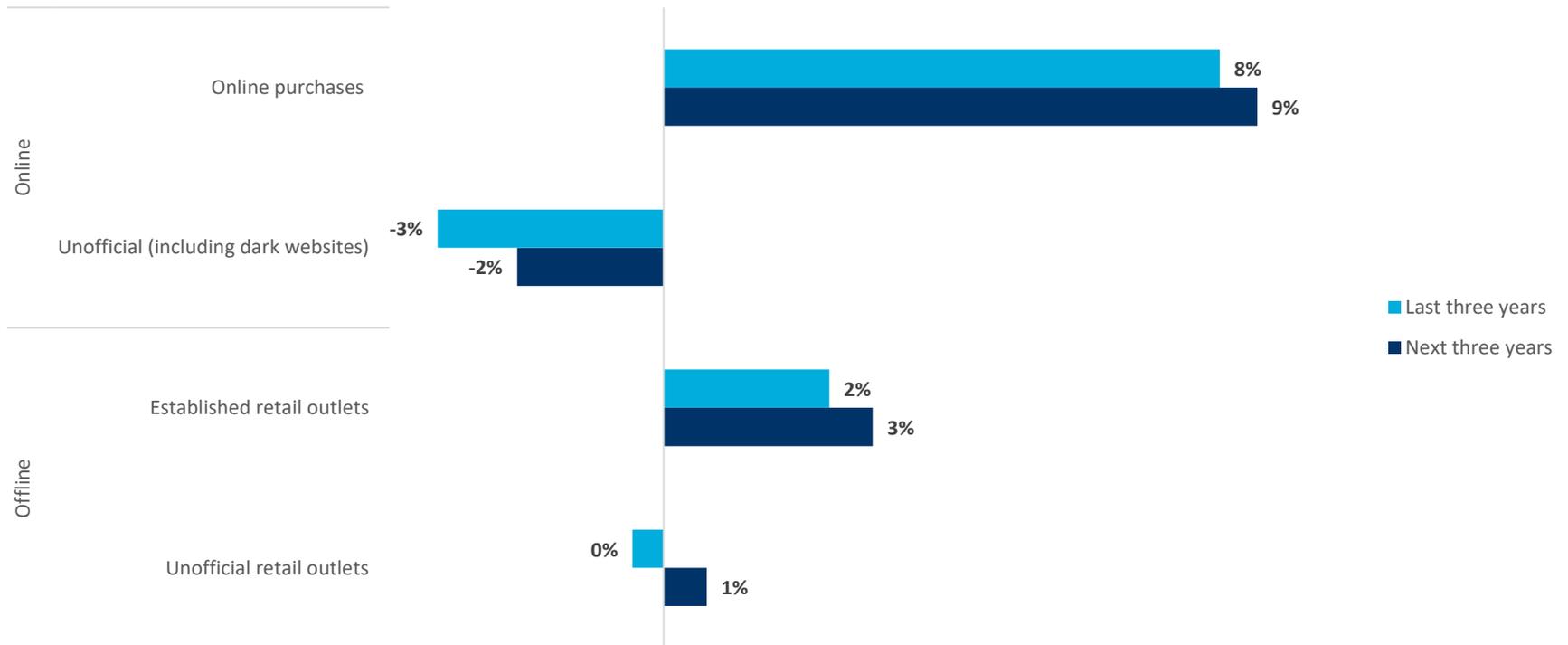


Source: Oxford Economics consumer survey; Official physical store n=8,571; Unofficial offline n=16,896; Official online store or app n=8,541; Online marketplace n=8,507; Unofficial website n=8,393

- Buying from official physical stores, consumers are clearly more confident that they are buying legit goods, compared with an unofficial source (a friend, colleague or market).
- Online, confidence in official outlets is much lower, with less than half (42%) fully confident that they are buying legitimate goods from online marketplaces.

Consumers are buying more online, and via official sources

Please tell us how you expect your shopping attitudes and behaviours will change over the next three years
Consumers

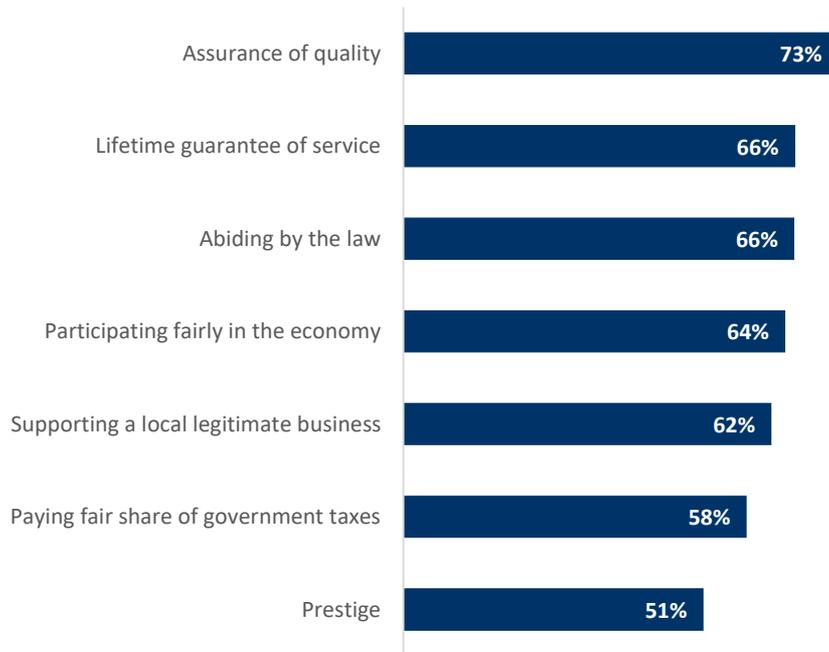


Source: Oxford Economics consumer survey, n=8,611

- This level of consumer uncertainty looks likely to persist, as consumers buy more online.
- Consumers say they are moving away from unofficial outlets online, though they forecast a small increase (1%) in unofficial retail outlets.
- Overall, consumers predict that they will buy 5% less illicit films over the next three years.

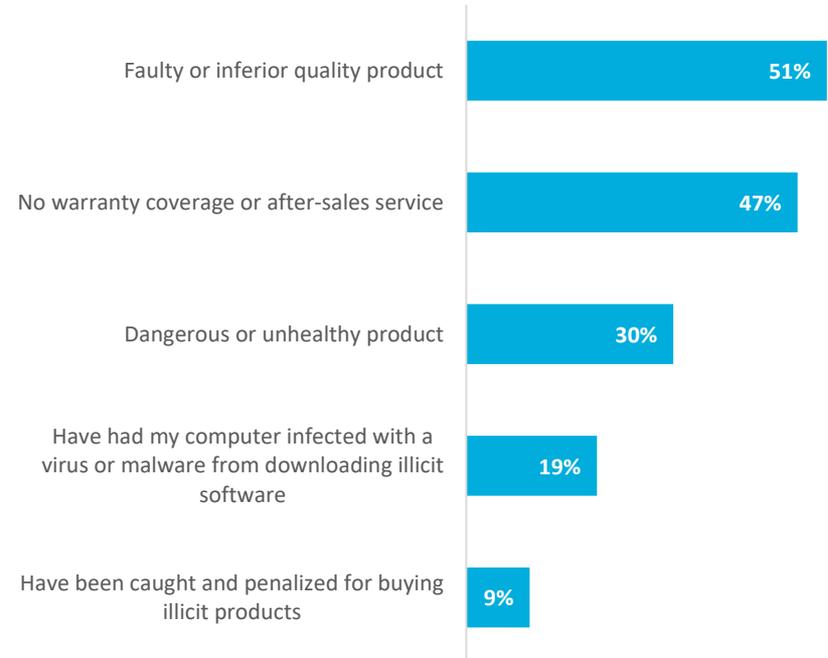
There are many reasons to prefer official channels

Please rate the importance of each of the following factors in buying from authorized sources
"Very important" and "Important" responses
Consumers



Source: Oxford Economics consumer survey, n=8,251

Have you ever experienced any of the following as a result of buying potentially illicit goods
Consumers

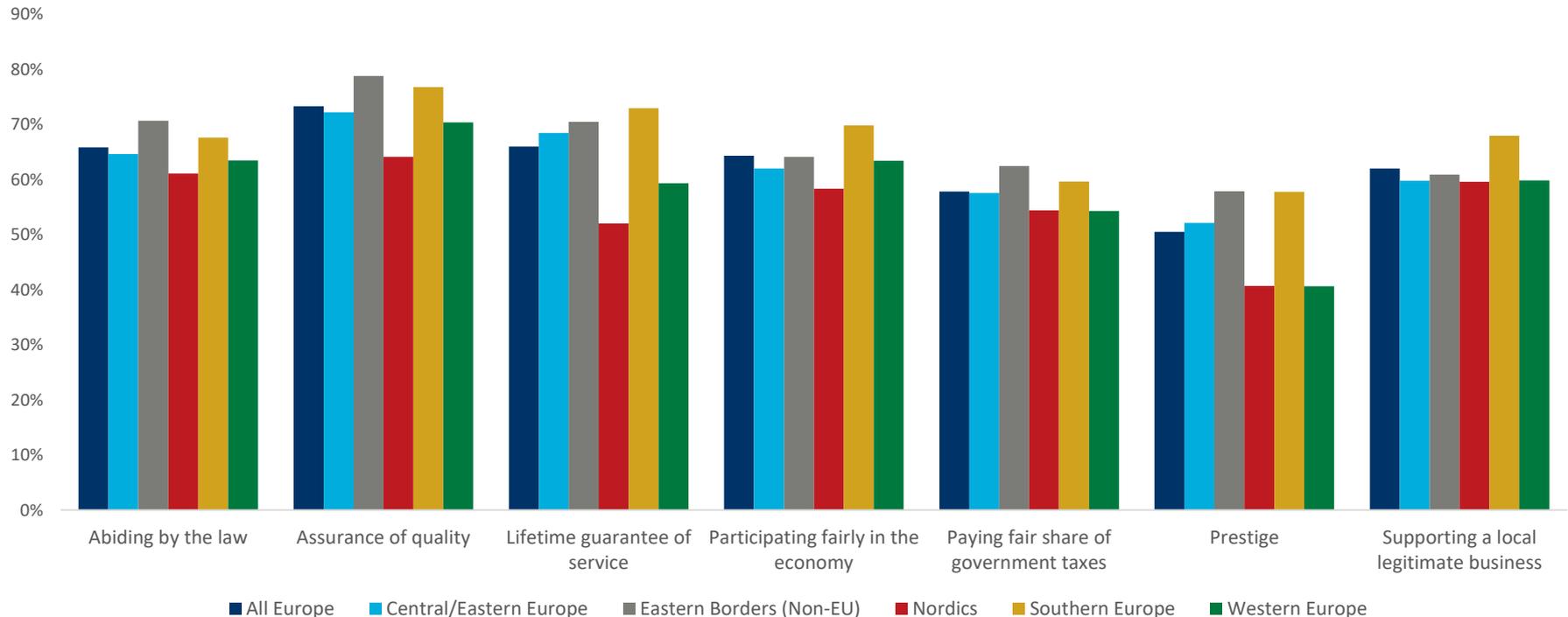


Source: Oxford Economics consumer survey, illicit responses, n=4,544

- Assurance of quality, with less risk of a dangerous or unhealthy product and better service over the products' life, are the leading reasons given for preferring legitimate goods (and avoiding illicit ones).
- "Social reasons", such as abiding by the law and supporting legitimate businesses, also feature, ahead of brand prestige.

Reasons to favour licit goods will vary by region

Please rate the importance of each of the following factors in buying from authorized sources
“Very important” and “Important” responses
 Consumers



Source: Oxford Economics consumer survey, n=8,251; Central/Easter Europe n=1,753; Eastern Borders n=1,517; Nordics n=794; Southern Europe n=2,061; Western Europe n=x2,126

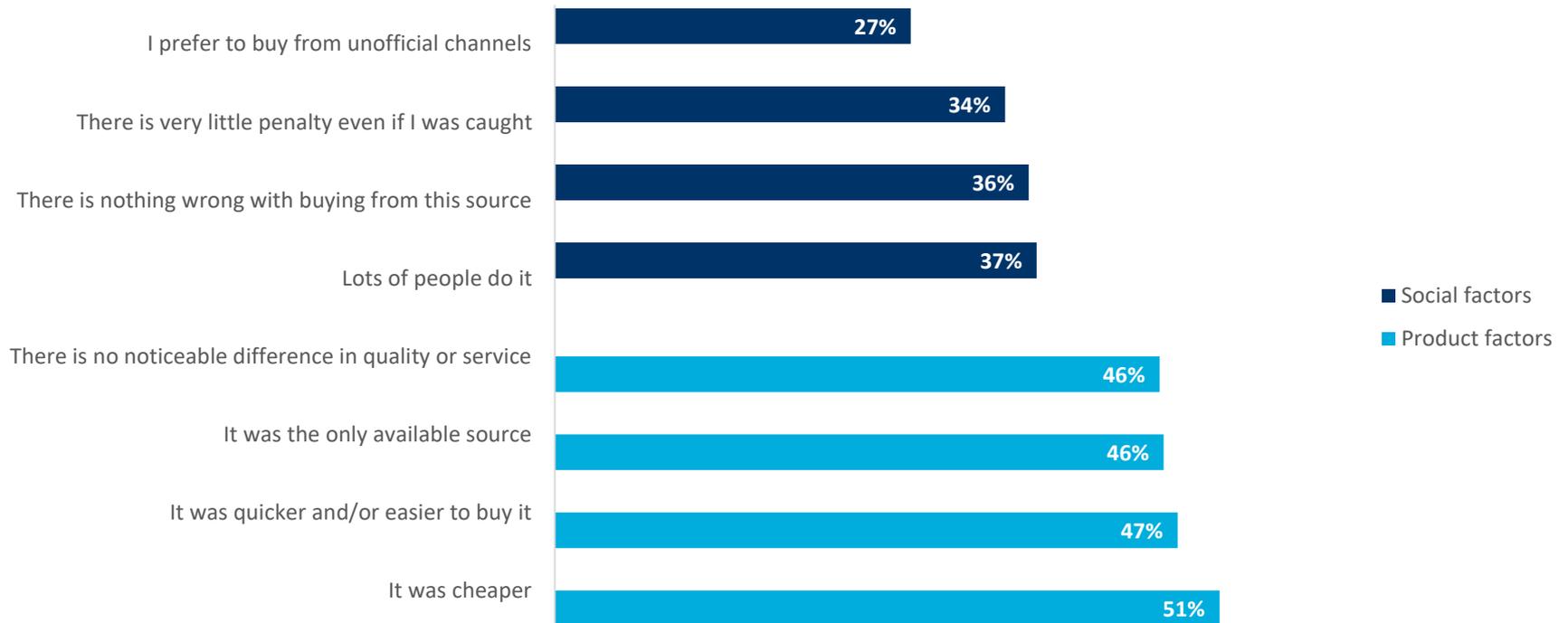
- There appears to be consistency across European regions in social attitudes towards illicit trade, e.g., regarding the importance of abiding by the law and paying taxes.
- There is greater regional variety to more product-centric reasons for preferring legitimate goods, 12 e.g., lower scores in Nordics for quality assurance, lifetime service and prestige.

Product and social reasons also drive illicit purchases

Please rate the importance of each of the following factors in buying from potentially unauthorized sources

“Very important” and “Important” responses

Consumers

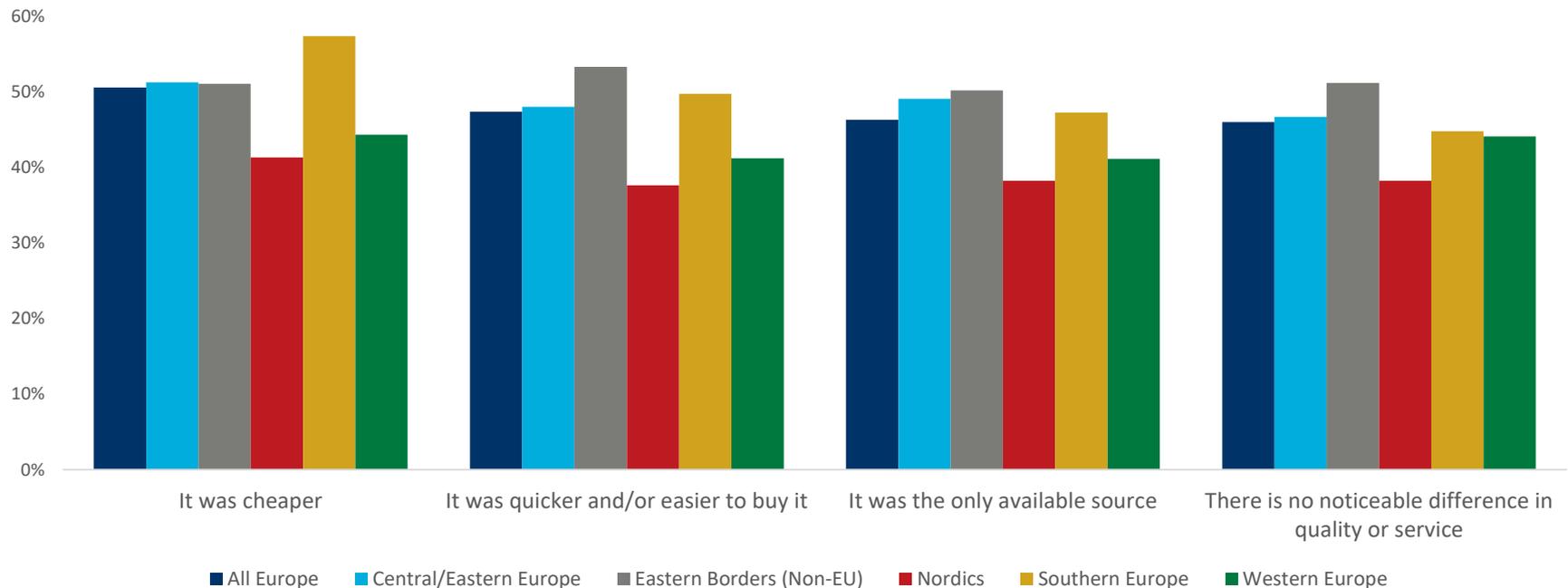


Source: Oxford Economics consumer survey, illicit purchases, n=4,544

- Cost is the most popular reason for buying illicit films, but is closely followed by other “product”-related reasons, like availability or no noticeable difference in quality.
- Social factors also feature, if some way behind product factors.

Motivations to buy from unauthorized sources vary by region

Please rate the importance of each of the following factors in buying from potentially unauthorized sources
“Very important” and “Important” responses
 Consumers

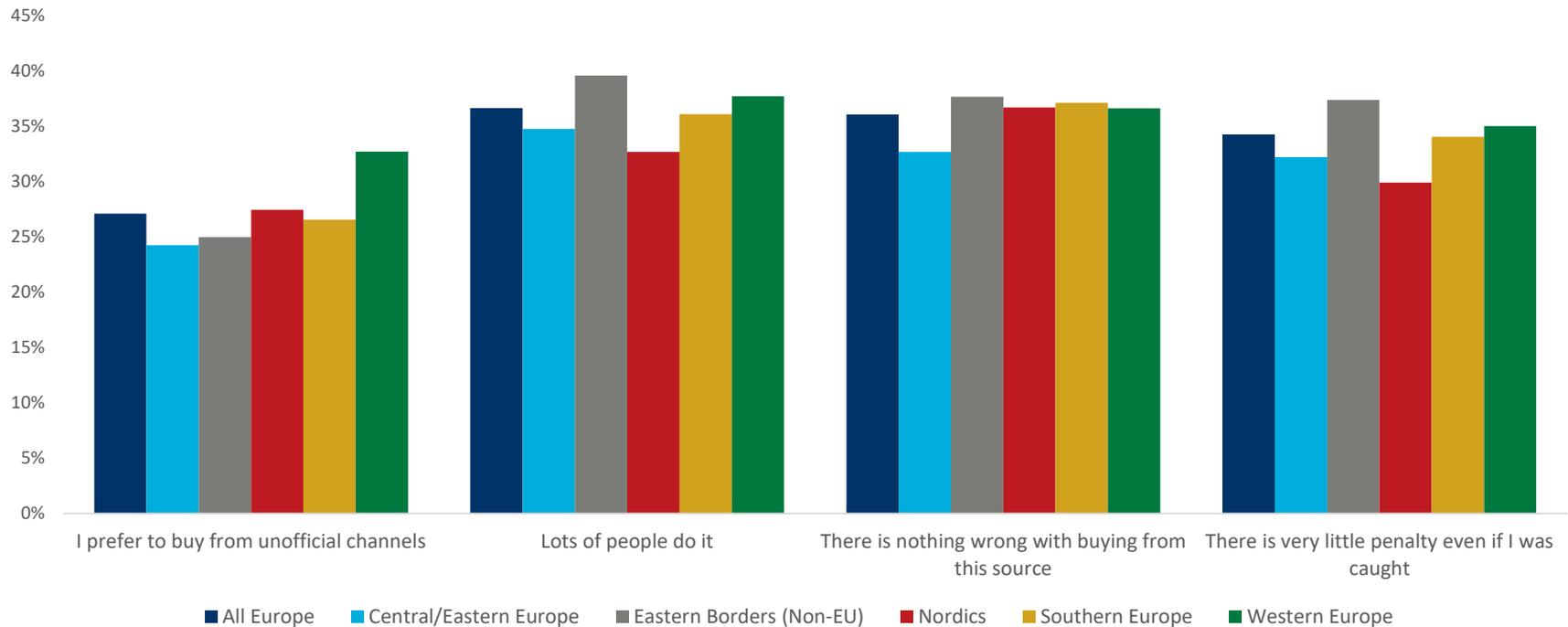


Source: Oxford Economics consumer survey, illicit purchases, n=4,544; Central/Eastern Europe n=1,055; Eastern Borders n=992; Nordics n=324; Southern Europe n=1,174; Western Europe n=999

- There is noticeable variety in regional responses as to why they buy from unauthorized sources, with Nordics rating factors lowest, followed by Western Europe. Overall, cost is the leading reason, but only just, with all others close behind.
- Cost is the leading reason in Southern Europe, Central/Eastern Europe and Nordics. For Western Europe, difference in quality/service is just as important as cost.

Social motivations for illicit purchases are more consistent

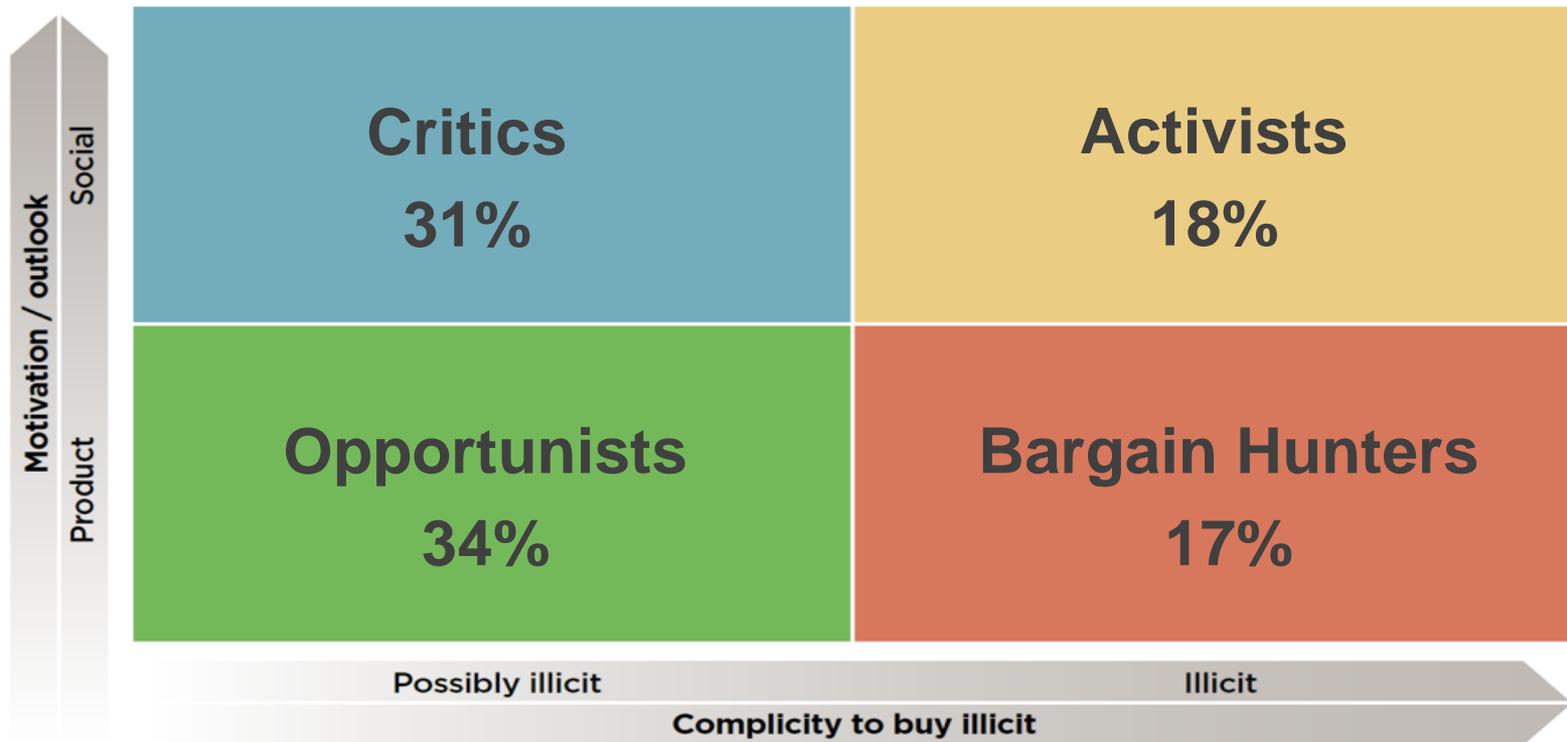
Please rate the importance of each of the following factors in buying from potentially unauthorized sources
"Very important" and "Important" responses
 Consumers



Source: Oxford Economics consumer survey, illicit purchases, n=4,544; Central/Easter Europe n=1,055; Eastern Borders n=992; Nordics n=324; Southern Europe n=1,174; Western Europe n=999

- Similar to total purchases, there is less regional variety regarding the social reasons for buying films from potentially unauthorized sources. An interesting exception is the large share of Western Europe's consumers preferring to buy from illicit channels.

We can use motivation and complicity to segment illicit purchases



Source: Oxford Economics consumer survey, illicit purchases, n=4,544

- To analyse illicit purchases, we can group them into four segments based on the complicity to buy illicit (i.e. whether it was a possible or probable illicit purchase), and the motivation (mostly for product reasons, or where social reasons are at least as important).

Each consumer segment exhibits distinct characteristics



- We can view the spread of illicit films purchases and how consumer motivations differ by region.



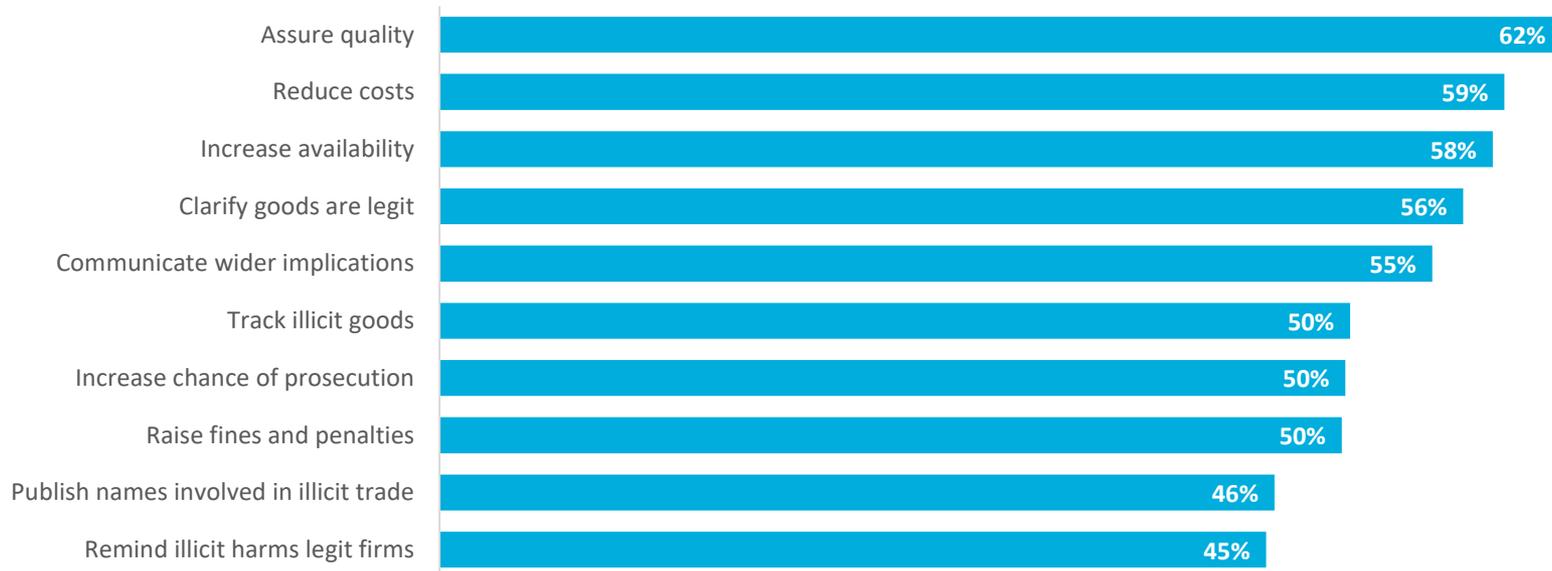
WHICH ACTIONS COULD DETER CONSUMERS?

A combination of initiatives can deter illicit purchases

How effective would the following actions be in discouraging you from buying from sources that may not be legitimate?

“Very important” and “Important” responses

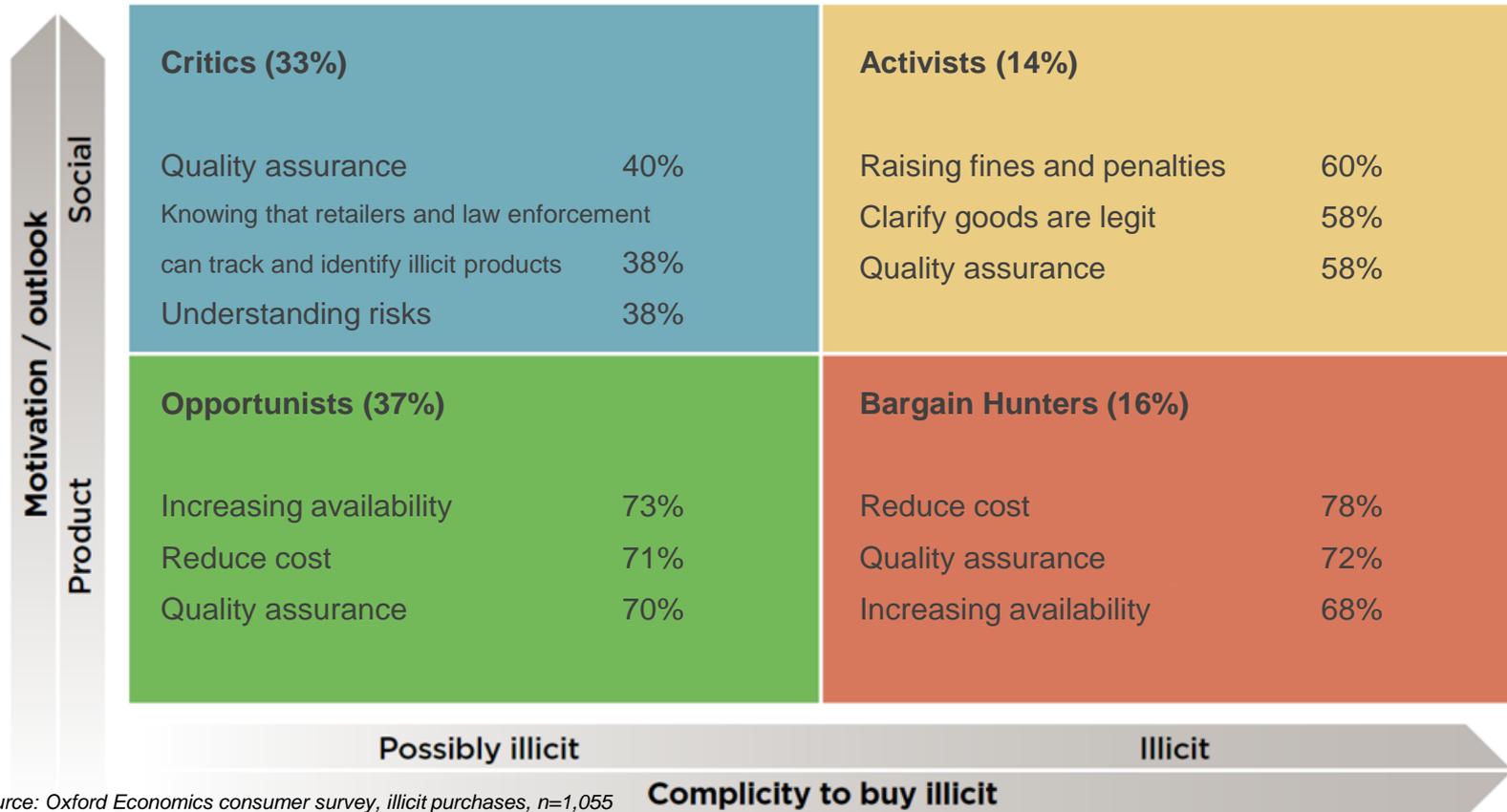
Consumers



Source: Oxford Economics consumer survey, illicit purchases, n=4,544

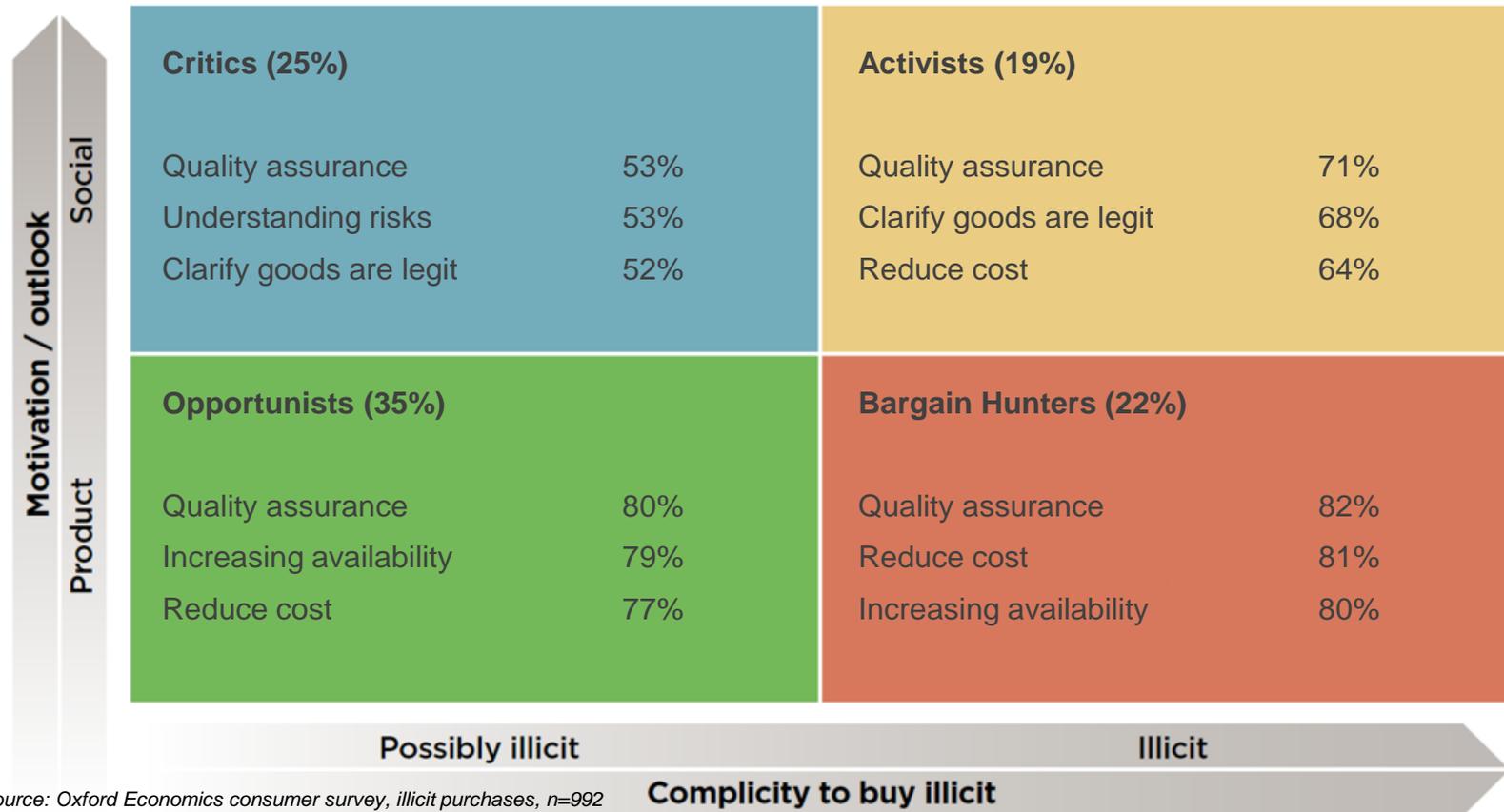
- The responses confirm the complexity of consumer motivations; that there may be several reasons why a consumer buys illicit films and a variety of effective interventions to deter them.
- The following charts list, for each region, the top three effective strategies for each segment, with the percentage of purchases that respondents said could be deterred by the initiative.

For Central/Eastern Europe, quality assurance and reducing cost could be effective



- Product-focused purchases show expected strategies, with reducing cost the most popular, followed by increasing availability and quality assurance.
- Strategies for the 33% of critics and 14% of activists show a different pattern. Quality assurance is the only shared strategy with cost surprisingly not in either group's top three.

For Eastern Borders, quality assurance is key



- For the Eastern borders region, quality assurance is the top strategy for all four groups. Reducing the cost of legitimate goods is also likely to be a successful way to reduce illicit trade as stated by activists, opportunists and bargain hunters.

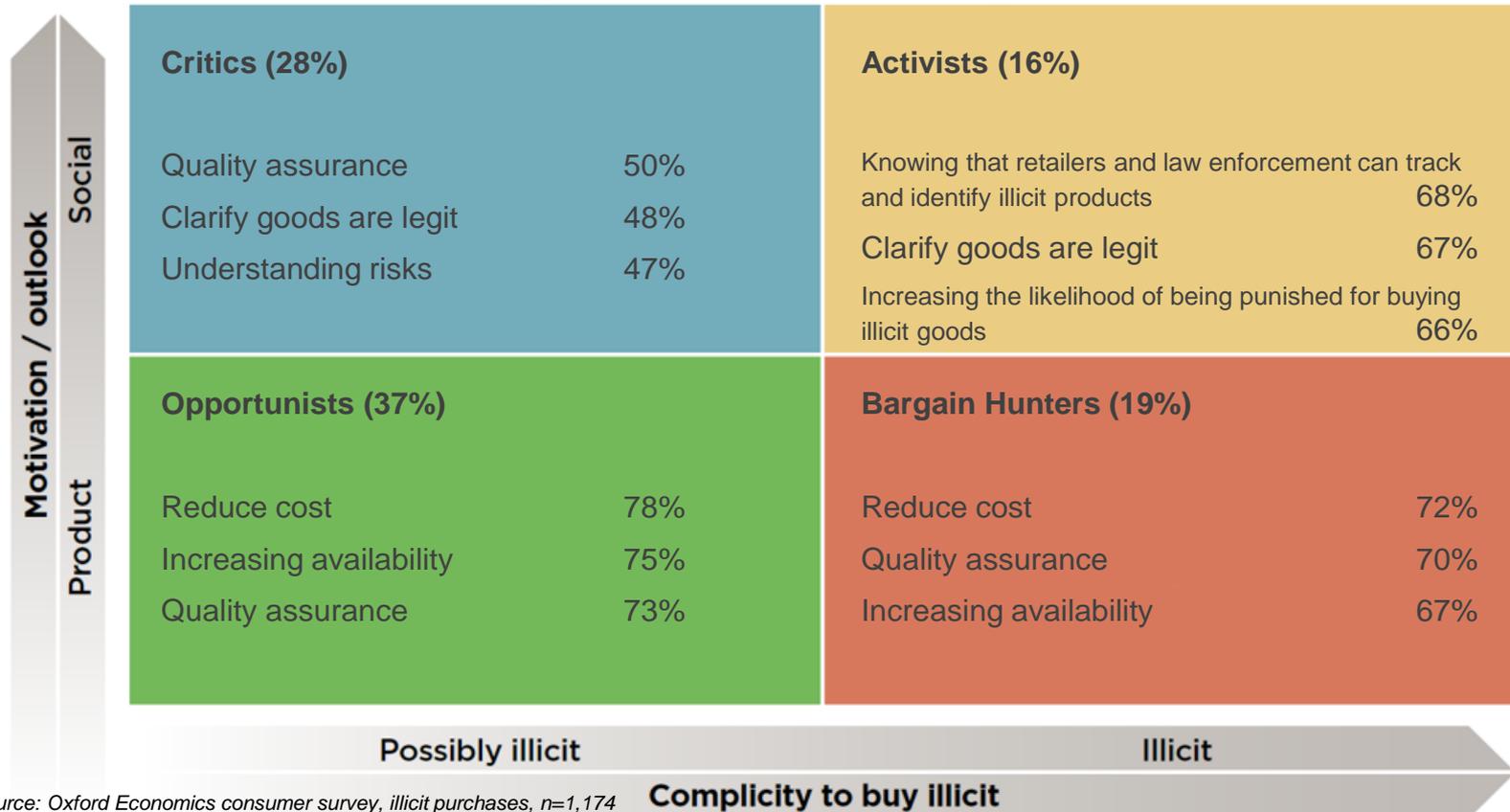
For Nordics, clarifying goods are legit and introducing sanctions could have an impact



Source: Oxford Economics consumer survey, illicit purchases, n=324

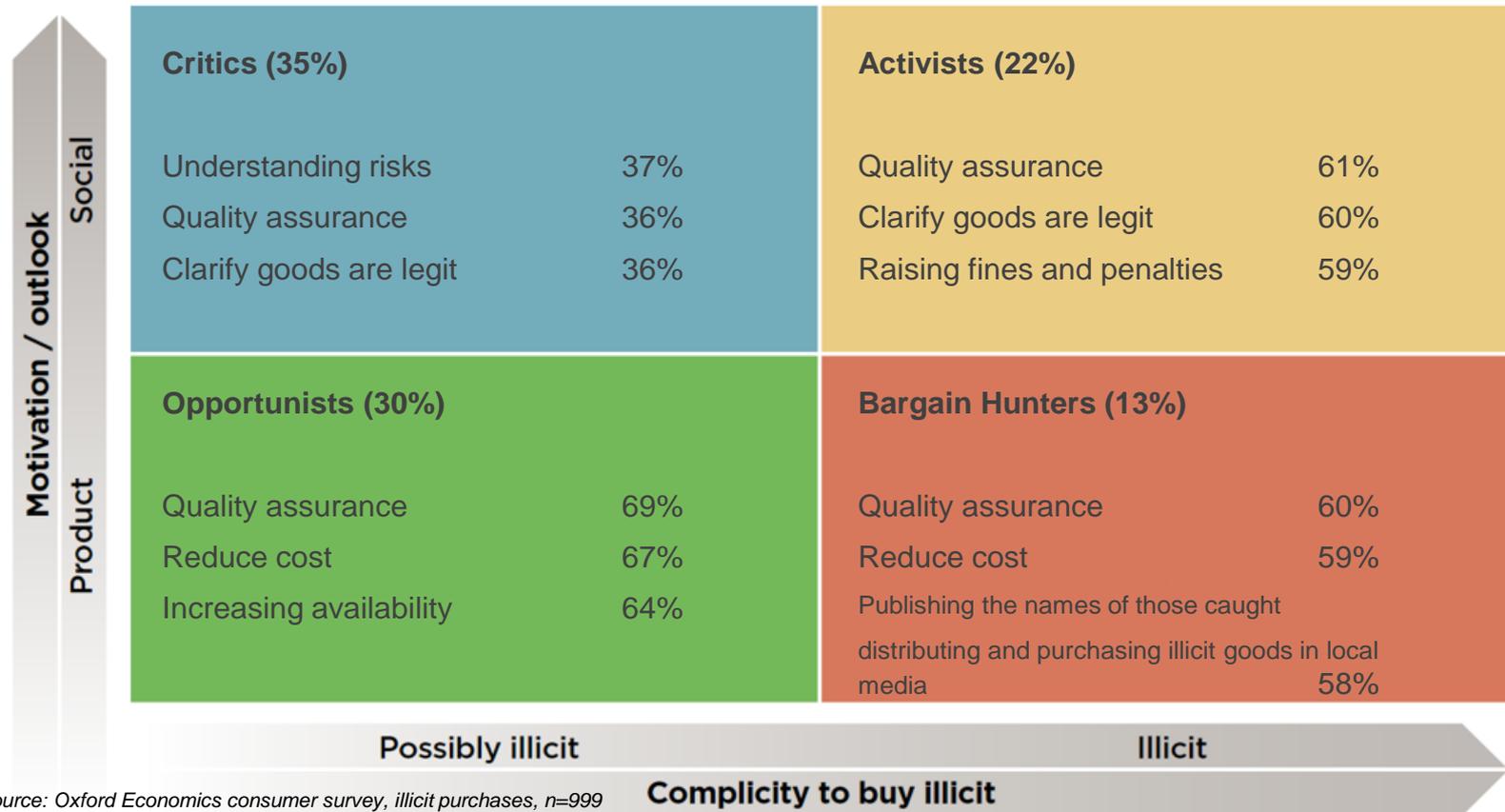
- Clarifying goods are legit is the most effective strategy for Nordics across the four groups.
- Publishing names, and raising fines and penalties feature for activists and bargain hunters respectively, suggesting they could be an effective way to reduce illicit trade.

For Southern Europe clarifying goods are legit features along with cost, quality and availability



- For the 56% of product-related illicit purchases, the most effective strategies are as expected; reducing cost, assuring quality and increasing availability.
- For the 28% of critics and 16% of activists, cost and availability don't feature in the top three, with clarifying goods are legit effective for both, and tracking illicit products important for activists.

For Western Europe, cost is less of a motivation



- Western Europe has a majority of illicit purchases for social reasons (57%). Most effective strategies are quality assurance and clarifying goods are legit.
- Quality assurance is the top strategy for three segments and features in all, whereas cost features only in only the two product-related segments. For bargain hunters, publishing names may deter illicit purchases.

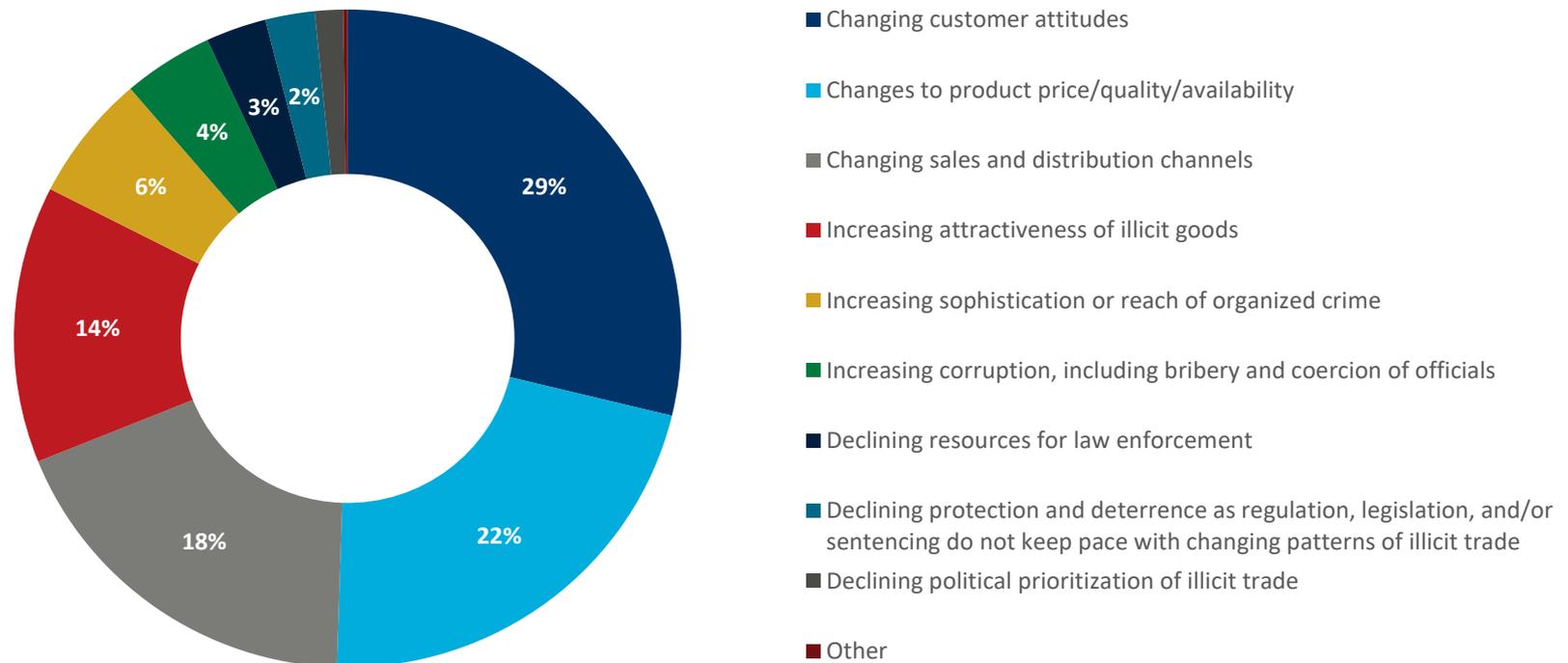


APPROACHES TO COMBATTING ILLICIT FILMS

Those fighting illicit trade highlight shifts in consumer behaviour and product features as most significant

What are the top five reasons for the increase in illicit alcohol?

Top-ranked responses
Stakeholders



Source: Oxford Economics stakeholder survey, n=1,463

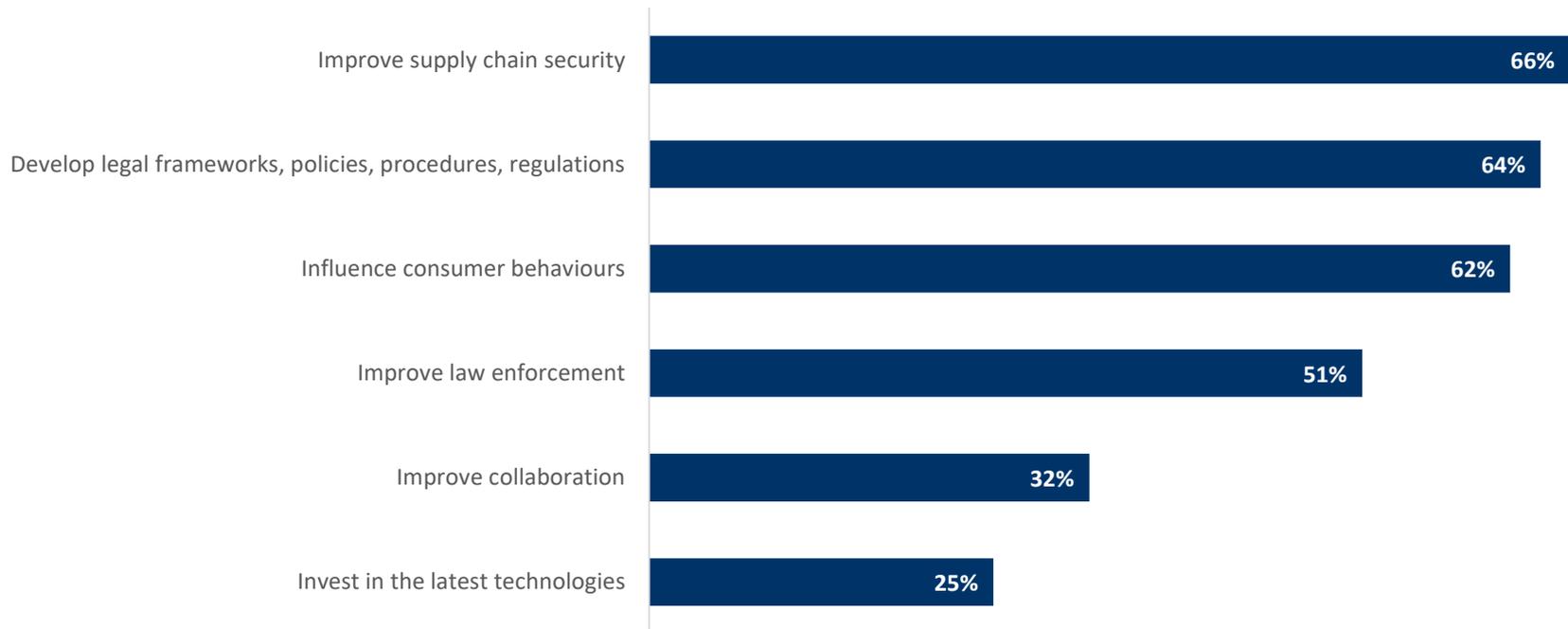
- Businesses, policy officials and law enforcers (stakeholders) recognise the shifting nature of illicit trade, in particular changes in customer attitudes, to products and distribution channels.

Multiple strategies will be needed, actioned by businesses, policy officials and law enforcement

Which of the following actions would be most effective in combatting illicit trade?

Top three-ranked choices

Stakeholders



Source: Oxford Economics stakeholder survey, n=2,887

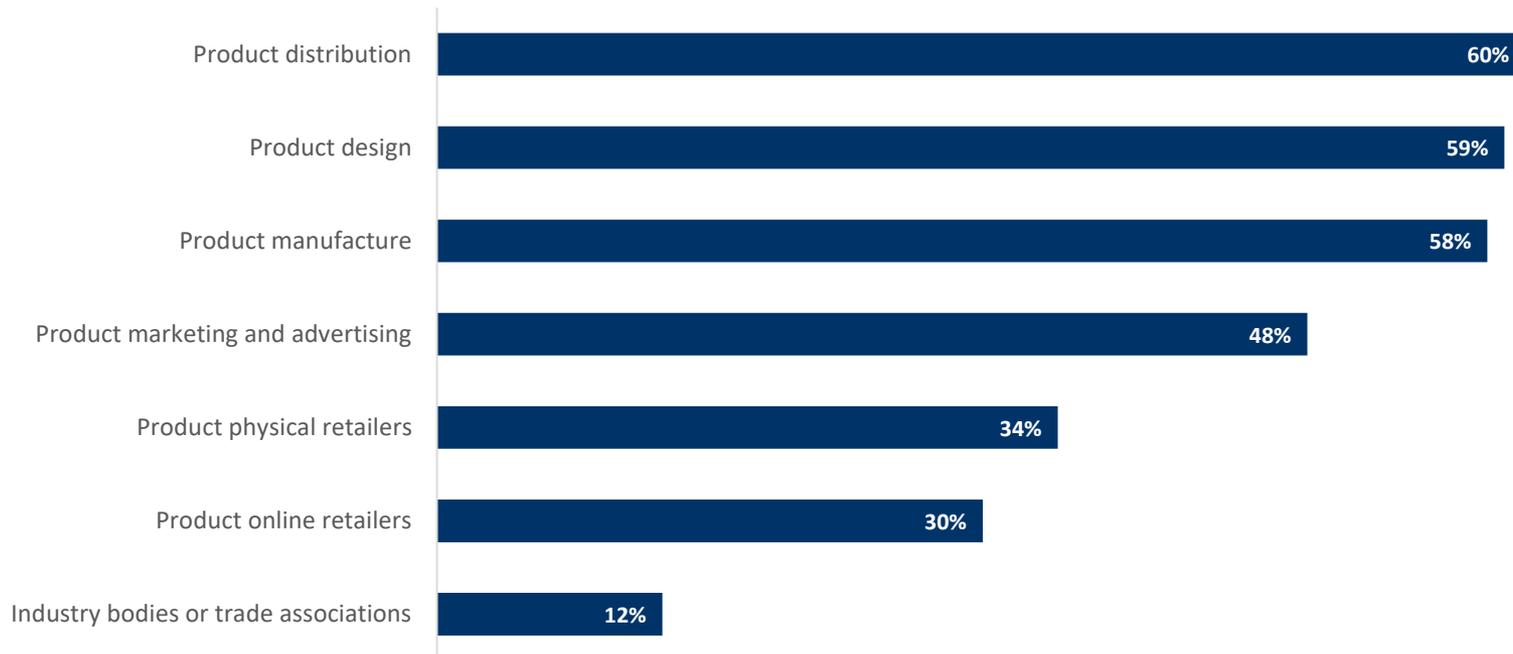
- Stakeholders prioritise supply chain improvements and policy interventions. Improving collaboration and investing in the latest technologies are prioritised by fewer respondents.

Stakeholders recommend action at early stages in the supply chain

Where would action be most effective in improving products the supply chain and retailing?

Top-three ranked choices

Stakeholders



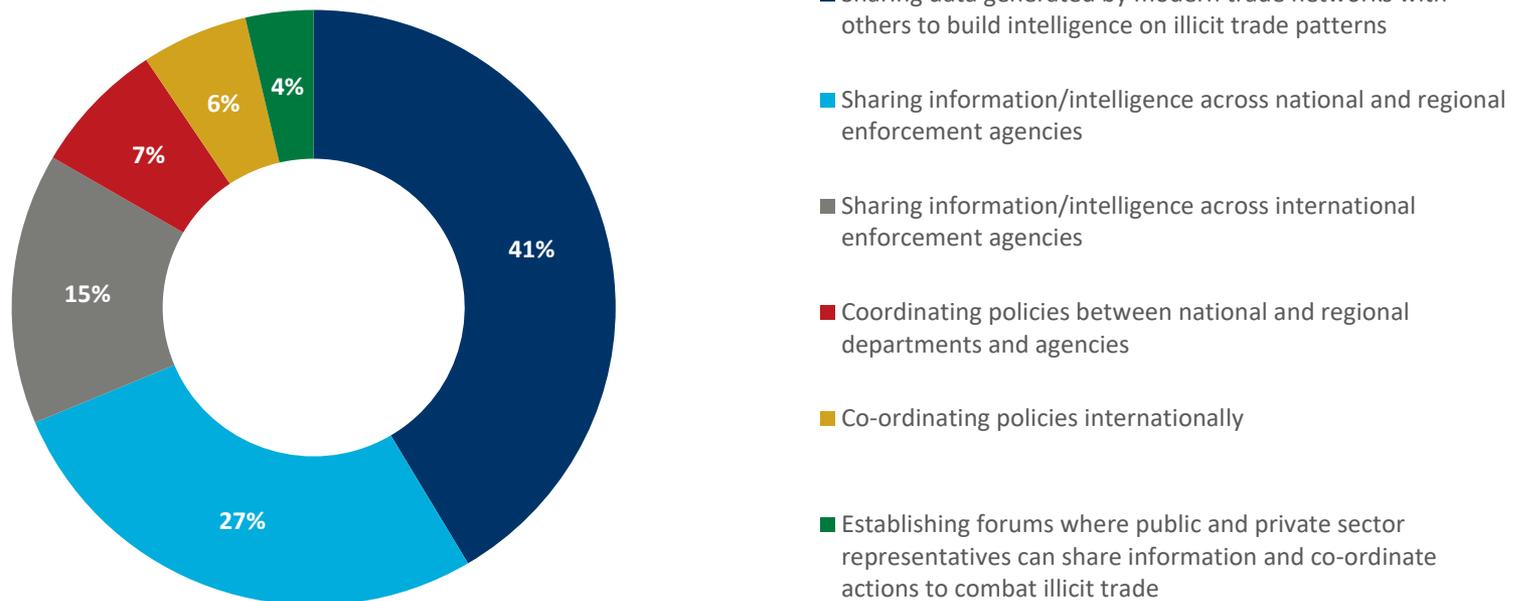
Source: Oxford Economics stakeholder survey, n=2,887

- Most effective actions in the supply chain are at the early stages, design, manufacture and distribution.
- Actions to combat illicit trade by retailers, offline and online, are viewed as less effective.

There are opportunities for stakeholders to work together to combat illicit films

Which actions would be most effective in improving collaboration among different parties involved in combatting illicit trade?

*Top-ranked responses
Stakeholders*

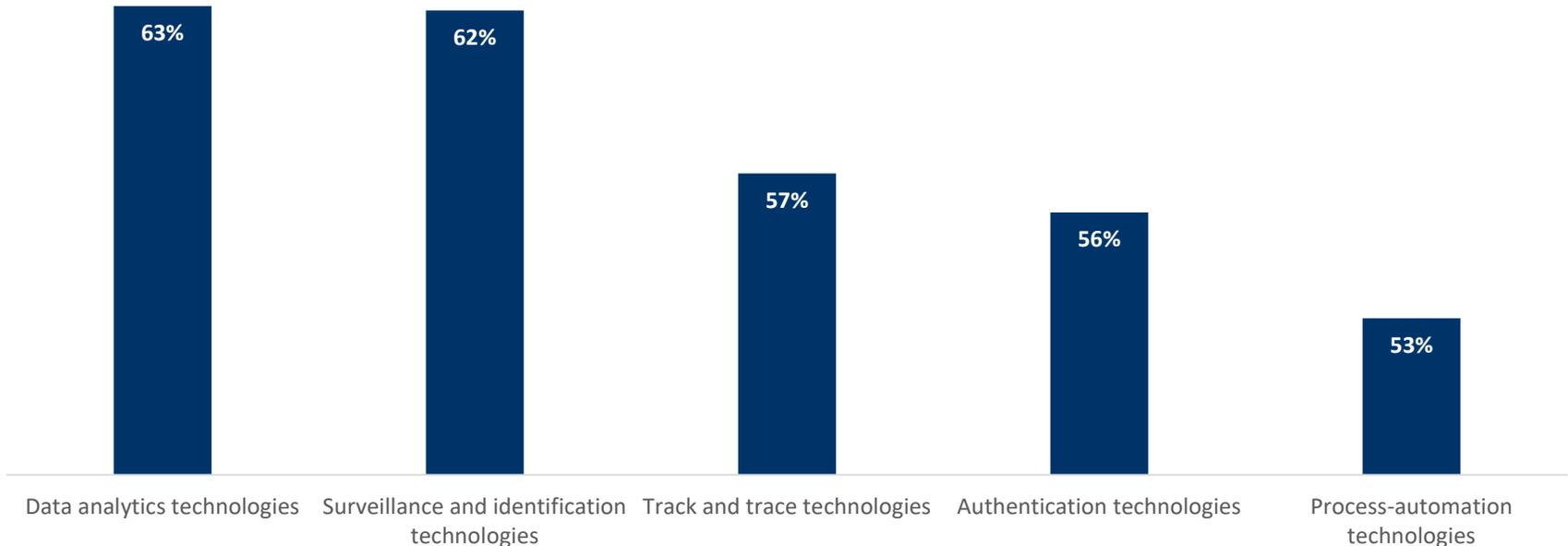


Source: Oxford Economics stakeholder survey, n=2,887

- Those working to combat illicit trade recognise that more can be done to work effectively together, and across departmental and geographic borders. Sharing data and intelligence is seen as by far the most effective way to collaborate, ahead of policy co-ordination.

Technologies are not seen as a quick fix

Please rate the effectiveness of the following technologies in tackling illicit trade?
“Extremely effective” and “Effective” responses
Stakeholders



Source: Oxford Economics stakeholder survey, n=2,887

- There are important innovations that make a difference and are seen as effective by the majority of stakeholders.
- Stakeholders appear to be realistic, not viewing technology as a quick fix. These scores are a moderate endorsement and technology is seen as the least effective action overall to combat illicit trade (on p27).

Stakeholders are ill-prepared to tackle illicit trade...

Please rate your level of agreement with the following statements about your organization's capabilities and efforts to tackle illicit trade in your country?

"Strongly agree" and "Agree" responses
Stakeholders



Source: Oxford Economics stakeholder survey, n=2,887

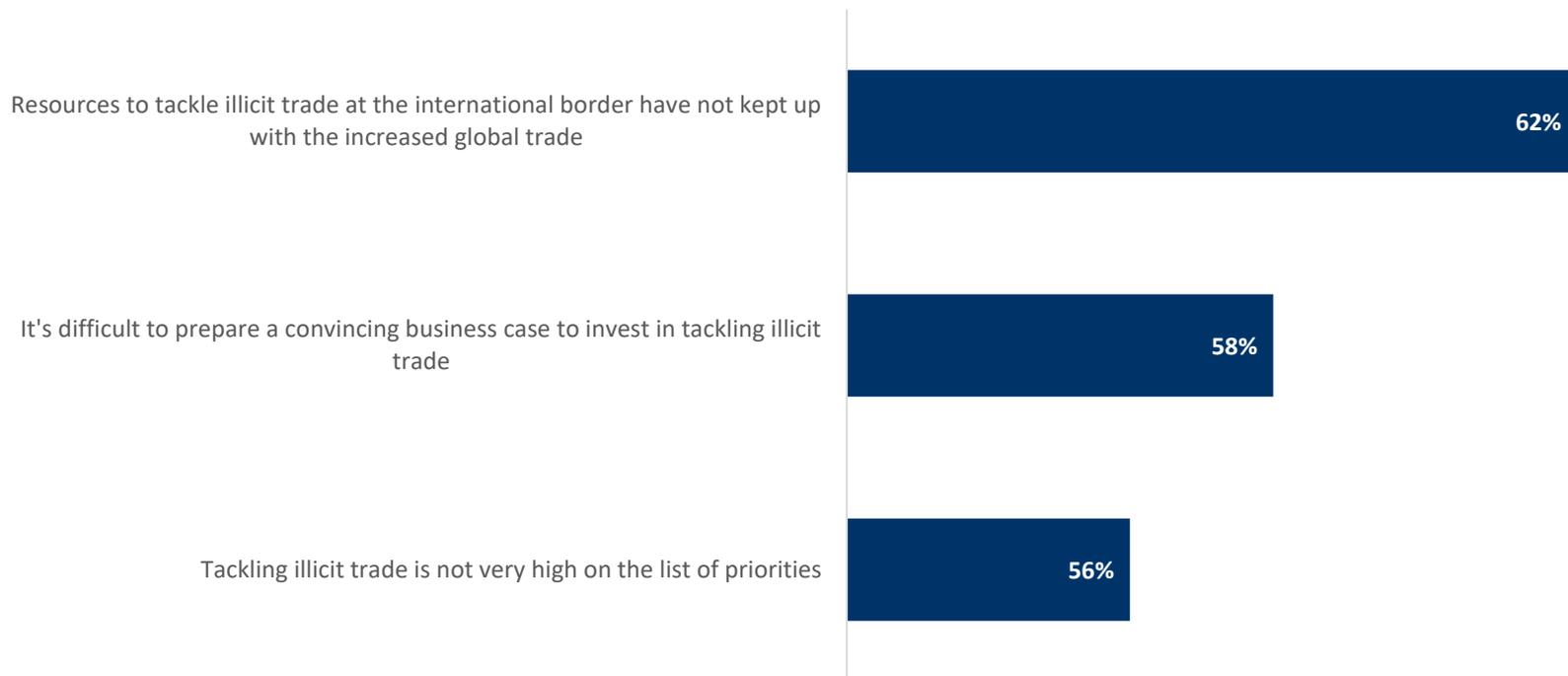
- Businesses highlight difficulties ensuring compliance with systems, policies and procedures (for 56% of stakeholders). Not many say they have access to good data and intelligence to understand illicit trade (54%) and have effective practices in place (58%).

...and have difficulty securing resources and sponsorship

Please rate your level of agreement with the following statements about your organization's capabilities and efforts to tackle illicit trade in your country?

"Strongly agree" and "Agree" responses

Stakeholders



Source: Oxford Economics stakeholder survey, n=2,887

- Stakeholders feel that the resources dedicated to fighting illicit medicines have not kept up with the growth in trade volume.
- Most have difficulty securing resources to fight illicit trade, as it is not high up the priority list, or it is difficult to prepare a convincing business case.

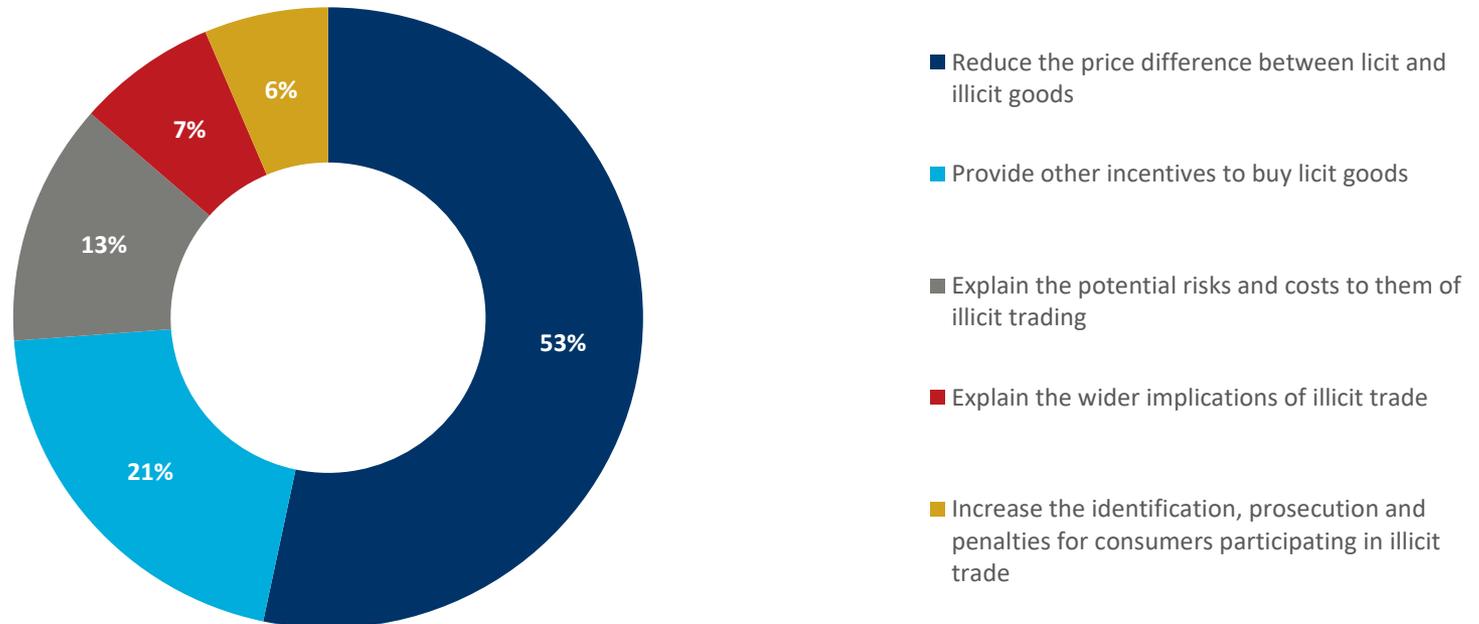


**THE STRATEGY GAP: CONSUMERS VS.
STAKEHOLDERS**

Stakeholders emphasize cost to influence consumers

Which of the following actions would be most effective in discouraging consumers from illicit trading?

*Top-ranked responses
Stakeholders*



Source: Oxford Economics stakeholder survey, n=2,887

- The majority of stakeholders (53%) say reducing cost is the most effective action for reducing illicit films, far ahead of other actions, with 21% prioritising providing other incentives to buy legitimate goods (e.g., improved quality or service) and a similar number education into the risks and implications of illicit trade. Only 6% say increasing penalties would be the most effective action.

Whereas consumers highlight several initiatives above cost

How effective are the following strategies for combatting illicit trade in your country?
“Very effective” and “Somewhat effective”
 Consumers



Source: Oxford Economics consumer survey, n=8,611

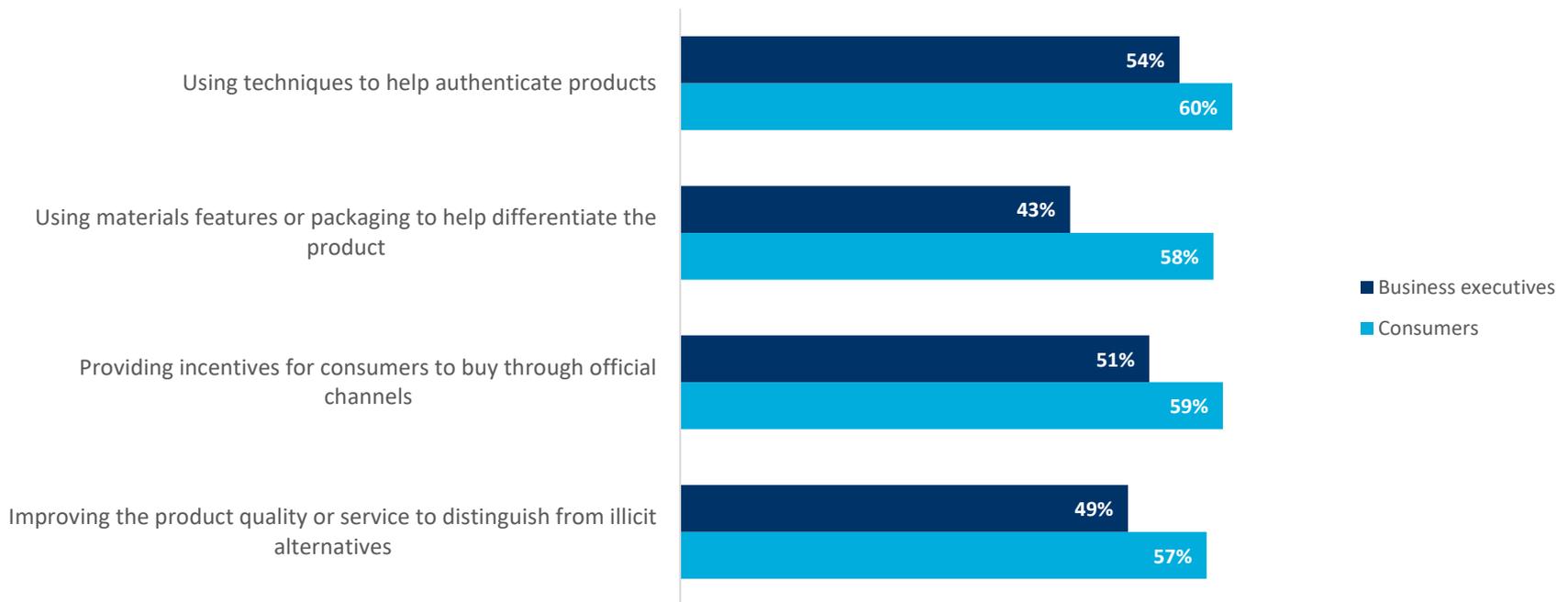
- According to consumers, reducing price is a mid-ranking action to tackle illicit trade in films. Several actions score higher, including product authentication and incentivising through improving other aspects of the product (e.g., rewards, quality, service and support etc).

Businesses are less enthusiastic than consumers about initiatives to combat illicit trade

For each of the initiatives implemented please rate its effectiveness at reducing illicit trade?

“Very effective” and “Effective” responses

Business executives and consumers



Source: Oxford Economics stakeholder survey, business executives, n=1,930

Source: Oxford Economics consumer survey, n=8,611

- Businesses show a lack of enthusiasm in initiatives to combat illicit films, such as using materials and packaging to distinguish legitimate products or providing incentives. Consumers are generally more positive about the effectiveness of all of these initiatives.

Stakeholders recognise the difficulty identifying illicit goods

Please rate your level of agreement with the following statements about consumer attitudes toward illicit trade in your country?

*“Strongly agree” and “Agree” responses
Stakeholders and consumers*



Source: Oxford Economics stakeholder survey, n=2,887

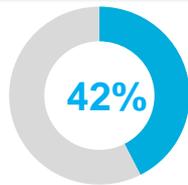
Source: Oxford Economics consumer survey, n=8,611

- Stakeholders have a good appreciation of the difficulty consumers face assessing whether their purchases are legitimate, but may underestimate difficulties with online purchases.

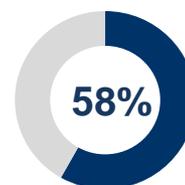
Stakeholders underestimate consumer awareness of the social impact of illicit trade



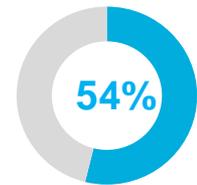
Consumers underestimate the personal risks of engaging in illicit trade



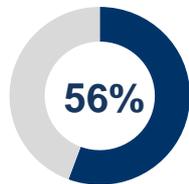
I'm not aware of the health risks of buying illicit goods



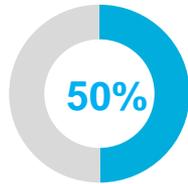
Consumers are unaware of the penalties for illicit trading



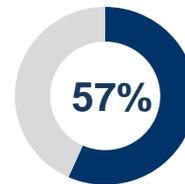
I'm not aware of the potential penalties for buying counterfeit products



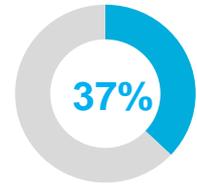
Consumers are unaware that buying illicit goods funds criminals and terrorists



Buying goods illicitly funds criminals and terrorists



Consumers see illicit trade as a victimless crime



Buying counterfeit or illicit goods is essentially a victimless crime

Source: Oxford Economics stakeholder survey, n=2,887

Source: Oxford Economics consumer survey, n=8,611

■ Stakeholders ■ Consumers

- Stakeholders may underestimate consumers' awareness of the implications of illicit trade and receptiveness to policies emphasising the social benefits of buying legitimate goods – with a difference of 18 percentage points in risk awareness, and a 20 percentage points difference in awareness of whether illicit trade is a victimless crime.



ACTIONS TO COMBAT ILLICIT FILMS

Actions to combat illicit films

- The following pages summarise for business executives, policy makers and law enforcement officers:
 - The initiatives to combat illicit trade most implemented over the last three years
 - The relative effectiveness of each initiative
 - The priority initiatives planned for the next three years
- The responses show shifting priorities, often in-line with the change in consumer motivations presented here.
- All 37 initiatives are viewed as having been effective in reducing illicit trade. However, there clearly remains much to be done, with very few initiatives implemented by more than half of survey respondents.

Business executives prioritise authentication, collaboration and awareness raising

Rank	Strategy implemented last three years	Effective reducing illicit trade	Priority next three years
1	Change product design	Collaborate with retailers law enforcement or others to combat illicit trade	Allow consumers distributors or retailers to authenticate the product using digital coding and smartphone technology
2	Use advertising and promotion to make official products and channels more attractive	Improve tracking monitoring and reporting through the supply chain	Collaborate with retailers law enforcement or others to combat illicit trade
3	Improve tracking monitoring and reporting through the supply chain	Allow consumers distributors or retailers to authenticate the product using digital coding and smartphone technology	Launch a campaign to educate and discourage consumers from illicit trade
4	Share information with others to improve understanding of illicit trade	Implement supply-chain contractual controls	Collect intelligence about illicit trade patterns
5	Change the price quality or service	Share information with others to improve understanding of illicit trade	Change the price quality or service
6	Change manufacture or packaging	Launch a campaign to educate and discourage consumers from illicit trade	Change manufacture or packaging
7	Implement supply-chain contractual controls	Collect intelligence about consumer attitudes	Improve tracking monitoring and reporting through the supply chain
8	Collect intelligence about consumer attitudes	Collect intelligence about illicit trade patterns	Share information with others to improve understanding of illicit trade
9	Collaborate with retailers law enforcement or others to combat illicit trade	Change the price quality or service	Implement supply-chain contractual controls
10	Allow consumers distributors or retailers to authenticate the product using digital coding and smartphone technology	Use advertising and promotion to make official products and channels more attractive	Collect intelligence about consumer attitudes
11	Launch a campaign to educate and discourage consumers from illicit trade	Change product design	Use advertising and promotion to make official products and channels more attractive
12	Collect intelligence about illicit trade patterns	Change manufacture or packaging	Change product design

	Information and intelligence
	Secure supply chain
	Influence consumers
	Collaborating externally

Conclusions and recommendations – Business executives

- Business executives should consider:
 - Collating better information on consumer motivations
 - Considering a range of strategies beyond price, including initiatives to build trust in legitimate goods
 - Collaborating more actively with trade bodies, policy officials and law enforcers
 - Investing more in the fight against illicit trade

Policy officials seek to upgrade penalties to retailers and criminal networks and raise consumer awareness

Rank	Strategy implemented last three years	Effective reducing illicit trade	Priority next three years
1	Research and collect information to understand patterns of illicit trade	Change penalties for consumers	Change penalties for retailers
2	Collaborate with international organizations	Use promotional or awareness campaigns to influence citizens' attitudes	Use promotional or awareness campaigns to influence citizens' attitudes
3	Update legislation and/or legal frameworks	Change penalties for businesses	Change penalties for criminal networks
4	Change penalties for businesses	Update legislation and/or legal frameworks	Provide businesses with guidance and/or discussion forums
5	Coordinate policy with other departments	Research and collect information to understand patterns of illicit trade	Coordinate policy with other departments
6	Change penalties for consumers	Collaborate with international organizations	Update legislation and/or legal frameworks
7	Provide businesses with guidance and/or discussion forums	Coordinate policy with other departments	Change penalties for businesses
8	Use promotional or awareness campaigns to influence citizens' attitudes	Change penalties for retailers	Change penalties for consumers
9	Change penalties for criminal networks	Change penalties for criminal networks	Collaborate with international organizations
10	Change penalties for retailers	Provide businesses with guidance and/or discussion forums	Research and collect information to understand patterns of illicit trade

	Information and intelligence
	Changes to legal & policy
	Promotion and awareness raising
	Collaborating externally

Conclusions and recommendations – Policy officials

- Policy officials should consider:
 - Investing in targeted awareness campaigns
 - Responding to the shifting patterns of illicit trade and growth of e-commerce
 - Co-ordinating policies and procedures more effectively
 - Developing joined-up business cases

Law enforcement aim to collaborate and keep up with latest trends

Rank	Strategy implemented last three years	Effective reducing illicit trade	Priority next three years
1	Research and collect information to understand patterns of illicit trade	Collaborate with other organizations to better identify high-risk imports	Collaborate with e-commerce suppliers couriers and distribution depots
2	Increase use of random searches at new locations	Collaborate with other members of your industry and with Chambers of Commerce to fight illicit trade	Train law enforcement officers about latest developments
3	Monitor and track shipments	Collaborate with policy-makers and other public-sector officials	Use data analytics and risk assessments to target enforcement
4	Implement processes or technology to aid product authentication	Train law enforcement officers about latest developments	Collaborate with international organizations on joint initiatives
5	Automate manual customs procedures	Collaborate with international organizations on joint initiatives	Improve compliance with existing policies and procedures
6	Measure the effectiveness of different enforcement initiatives in reducing illicit trade	Collaborate with e-commerce suppliers couriers and distribution depots	Collaborate with policy-makers and other public-sector officials
7	Collaborate with other organizations to better identify high-risk imports	Monitor and track shipments	Monitor and track shipments
8	Collaborate with other members of your industry and with Chambers of Commerce to fight illicit trade	Measure the effectiveness of different enforcement initiatives in reducing illicit trade	Collaborate with other organizations to better identify high-risk imports
9	Collaborate with policy-makers and other public-sector officials	Implement processes or technology to aid product authentication	Launch anti-corruption initiatives
10	Launch anti-corruption initiatives	Automate manual customs procedures	Collaborate with other members of your industry and with Chambers of Commerce to fight illicit trade
11	Use data analytics and risk assessments to target enforcement	Increase use of random searches at new locations	Implement processes or technology to aid product authentication
12	Improve compliance with existing policies and procedures	Improve compliance with existing policies and procedures	Measure the effectiveness of different enforcement initiatives in reducing illicit trade
13	Train law enforcement officers about latest developments	Launch anti-corruption initiatives	Increase use of random searches at new locations
14	Collaborate with e-commerce suppliers couriers and distribution depots	Use data analytics and risk assessments to target enforcement	Automate manual customs procedures
15	Collaborate with international organizations on joint initiatives	Research and collect information to understand patterns of illicit trade	Research and collect information to understand patterns of illicit trade

	Information and intelligence
	Process compliance and improvement
	Technology solutions
	Collaborating externally

Conclusions and recommendations – Law enforcement

- Law enforcement should consider:
 - Collaborating with e-commerce suppliers and others, reflecting the shifting nature of illicit trade
 - Enforcing compliance with policies and procedures, including training, use of technology to automate processes and anti-corruption initiatives
 - Invest in the latest approaches, including data analytics and risk assessments
 - Quantify the benefits of effective actions to combat illicit trade, to secure support

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