

The Australian Made, Australian Grown Campaign (AMAG) regularly conducts research in both domestic and international markets. All findings can be found in the AMAG Resource Centre on www.australianmade.com.au/research.

The following provides a brief overview of the most recent surveys:

INTERNATIONAL RESEARCH, USA – HORIZON CONSUMER SCIENCE 2010

- Awareness of AMAG promotions, aided (33%) and unaided (24%), was much higher in New York – where more recent promotions had been held - than Los Angeles.
- An analysis of Los Angeles research only supports the unsurprising findings that the more recent a promotion, the more likely it is that respondents remember the promotion.
- Awareness of the logo was similar for both markets with 14% of shoppers in Los Angeles aware of the logo and 15% of New Yorkers aware of the logo.
- When comparing awareness of the logo to that of other country of origin labels, the AMAG logo is generally lower than labels from US, Canada and Mexico, the USA's closest neighbours. However in Los Angeles, the AMAG logo is on par with the Canadian country of origin label.
- The AMAG logo is perceived by Los Angeles shoppers to communicate good design (58%), innovation (44%), quality (42%), care & craftsmanship (39%), reliability (37%), pure & natural (35%) and good value (25%).
- In New York, the figures are very different and the logo receives a relatively lower score: quality (32%), pure and natural (26%), design (25%), care & craftsmanship (20%), reliability (20%), innovation (9%) and value for money (6%).

INTERNATIONAL RESEARCH, DUBAI – HORIZON CONSUMER SCIENCE 2010

- As expected, the awareness of the logo and promotions is low. Only one of five shoppers recall a promotion and the same percentage recall having seen the logo when prompted.
- 13% of shoppers feel they have seen the logo in a store recently. This figure is higher than recall of country of origin labels from Mexico (9%) and Canada (6%), but lower than China (24%) and the USA (42%).
- Respondents agree that the AMAG logo clearly reflects positive attributes of Australian products. They strongly agree that the logo communicates high quality (93%), good design (77%), reliability (84%), produced with great care and craftsmanship (80%), pure & natural (83%), good value for money (73%) and finally innovation (85%).

INTERNATIONAL RESEARCH, SINGAPORE – HORIZON CONSUMER SCIENCE 2010

- Awareness of AMAG's promotion and the logo was high with 70%+ recalling having seen the logo as part of the promotion or in general. 39% recalled having seen the promotion without any prompts, while 85% recalled the AMAG promotion after being prompted.
- A very high percentage of respondents, 71%, believe they saw the logo during a recent shopping trip. This figure is much higher than for other country logos such as USA (34%), China (20%), Canada (18%) and Mexico (5%).
- The AMAG logo is by far (74%) considered the most recognised symbol for products that are Australian.
- Respondents believe the AMAG logo communicates high quality (69%), good design (65%), reliability (65%), produced with great care and craftsmanship (65%), pure & natural (56%), good value for money (56%) and finally innovation (56%).

INTERNATIONAL CONSUMER RESEARCH, SHANGHAI – HORIZON CONSUMER SCIENCE 2010

- Awareness of logo and AMAG's recent promotion is high with 78% aided awareness of the logo (and 38% aided in-store awareness of the logo) and 60% aided awareness of promotion (unaided awareness also high at 37%).
- The AMAG logo is considered the most recognized symbol for Australia (49%) followed by the Australian flag.
- Respondents believe the AMAG logo communicates a number of positive attributes about Australian products including high quality (71%), good design (65%), reliability (64%), produced with great care and craftsmanship (65%), pure & natural (50%), good value for money (49%) and finally innovation (57%).

AMAG LICENSEES' EXPORT ACTIVITY RESEARCH – ROY MORGAN 2010

- Across all export markets, sales rose for products using the AMAG logo, particularly for exporters with sales of between \$100,000 and \$250,000 per financial year. Export sales remained relatively stable for products not using the AMAG logo;
- When asked which aspects of their products were most important for maintaining export sales, quality and price remained the top two but 'country of origin' rose in importance.
- Awareness of AMAG's promotional activities rose between 2009 and 2010, with the electronic News Update, Newsletter and Website all increasing as sources of awareness about the AMAG Campaign.
- There was a rise in the prominence of Asian countries as export markets for Australian exporters. The proportion of licensees exporting to China, Singapore, Japan, Hong Kong and Malaysia rose between 2008 and 2010.

AMAG LICENSEES' EXPORT ACTIVITY RESEARCH - YSC ONLINE 2010

- The number of exporters has increased steadily from 2007 to 2010, with 137 in 2006/07, 145 in 2007/08 and 163 in 2008/09 (19% increase over the period);
- The number of exporters has grown in all markets aside from Thailand (6% decrease);
- Growth has been strongest in markets where AMAG has undertaken export promotions;
- The main export market for respondents was the USA (60), followed by Hong Kong/China (50), the UK (42), Singapore (32) and Dubai/UAE (31); and
- Sales figures show a growth in turnover during the period. The number of logo users recording sales of greater than \$500K grew substantially while the number of non-logo users in the same category only increased by 20%.

AUSTRALIAN CONSUMER RESEARCH - ROY MORGAN 2009

- 94% of consumers recognise the AMAG logo;
- 85% trust the logo over other country of origin identifiers, such as flags, maps, claims, etc;
- 89% of consumers believe it to be 'very important' or 'important' that the fresh food they buy is Australian. Similarly, 82% of consumers believe it to be 'very important' or 'important' that the packaged food they buy is Australian;
- 65% of Australians buy Australian made 'whenever possible' or 'often';
- 43% of Australians specifically look for the AMAG logo to identify genuine Australian products;

AMAG LICENSEES' EXPORT ACTIVITY RESEARCH – ROY MORGAN 2009

- 44% of AMAG licensees export and another 16% intend to export in the next 12 months;
- The biggest export markets for licensees are New Zealand (40%), USA (31%), UK (25%) and China (16%);
- 73% of AMAG licensees use the logo in export markets with the primary reason being to differentiate their product and highlight its 'Australianness';
- The most commonly exported goods are clothing/footwear/leather/textiles/textile products, processed food/beverages/tobacco and health products/vitamins/pharmaceuticals;
- Country of origin was ranked third for the most important product feature.

INTERNATIONAL TRADE RESEARCH, DUBAI – HORIZON CONSUMER SCIENCE 2009

- Australian products are held in high regard: importers consider Australian products as being high quality (60%), reliable (60%), pure and natural (56%), innovative (53%) and well designed (52%);
- 1 in 3 importers expressed interest in importing Australian products if they were not already doing so;
- Importers ranked Australia first for country of origin branding having the most appeal with 89% wanting to see Australian branding on Australian products;
- Importers believed the presence of the AMAG logo emphasised Australian authenticity (91%), product reliability (91%), high quality of product (87%) and value for money (64%).

INTERNATIONAL CONSUMER RESEARCH, AMAG PROMOTIONS IN USA – HORIZON CONSUMER SCIENCE 2009

- Awareness of the AMAG logo has grown from 9% to 27% from 2005 and awareness of AMAG promotional campaigns has increased from 11% to 45%;
- 75% of respondents rated the AMAG promotions as positive which resulted in a high conversion rate of 25% of respondents purchasing Australian products;
- 74% of Los Angeles shoppers and 87% of San Francisco shoppers believe the AMAG logo captures their positive impressions of Australia.

AMAG LICENSEES' EXPORT ACTIVITY RESEARCH - ROY MORGAN 2008

- 50 per cent of logo users export;
- another 11 per cent intend to start exporting within the next 12 months;
- the biggest export markets for licensees are New Zealand, USA, UK and China;
- the logo is used by licensees in export markets whenever possible;
- the most commonly exported goods are: 'electronics', 'health products', 'textiles', 'clothing, footwear or leather', and 'processed food, beverages or tobacco';
- licensees believe the most important aspect of their goods is quality;
- licensees are particularly interested in export promotions such as pavilions at international trade fairs (19%) and would like the Campaign to work more closely with industry bodies and groups such as Austrade (14%). They are also interested in accessing more merchandise such as flags and participating in in-store promotions.

AUSTRALIAN CONSUMER RESEARCH — ROY MORGAN RESEARCH 2007

- 89% of consumers believe it to be 'very important' or 'important' that the fresh food they buy is Australian;
- 82% of consumers believe it is 'very important' or 'important' that the processed food they buy is Australian;
- 74% of consumers say that one of the reasons for buying Australian Grown is to 'support local farmers, fishermen and businesses';
- The most common reason for buying imported rather than Australian is that 'Australian produce not available' (46%).

INTERNATIONAL CONSUMER RESEARCH, USA — HORIZON CONSUMER SCIENCE 2007

- This was the final report of the three-year study to track the awareness of the Australian Made logo through a promotional campaign in Los Angeles between 2005 and 2007;
- In 2007 awareness of the logo increased to 26% (from 9% in 2005 and 12% in 2006) thanks to promotions at high end grocery stores targeting affluent consumers;
- US consumers were very positive about the Australian Made logo, seeing it as simple yet with a strong design;
- Reactions to the in-store promotions at the high end grocery stores were very positive and well remembered;
- In-store promotions were also linked to increase in sales.

INTERNATIONAL CONSUMER AND BUYER RESEARCH, BANGKOK — BROOKER CORP 2007

- This was the final report of the three-year study to assess the perceptions of the Australian Made logo by consumers and importers and distributors of Australian products;
- 12% of respondents have seen the Australian Made logo when asked unprompted;
- The logo is associated with high quality products by 61% of respondents;
- Australia ranked fifth among the top most popular countries of origin by choice for imported products;
- When asked to rank the importance of various factors to buying an Australian product, 97% of respondents cited that product quality is important, followed by trust in brand, design/innovation and familiarity/experience, respectively;
- 62% of respondents trust the tag-line “Australian Made, Global Quality”, because they believe Australian products are of high quality;
- 70% of importers and distributor respondents stated that the logo would positively influence their choice to purchase to purchase, if choosing between two similar products;
- 78% of respondents mentioned that the logo would have a positive impact on the allocation of shelf space in outlets.

AUSTRALIAN CONSUMER RESEARCH — ROY MORGAN RESEARCH 2006

- 98% of consumers recognise the Australian Made, Australian Grown logo (known as the Australian Made logo at time of survey);
- 86% trust it over any other country of origin identifier, such as flags, maps, claims, etc;
- 89% of consumers believe it to be 'very important' or 'important' that the fresh food they buy is Australian;
- 49% claim to buy Australian made 'whenever possible';
- Another 18% buy Australian made 'often';
- 42% rely on the Australian Made, Australian Grown logo to identify Australian products.

INTERNATIONAL CONSUMER RESEARCH — ROY MORGAN RESEARCH 2006

- People from Australia, Indonesia, New Zealand, UK, USA and Thailand were interviewed about their buying preferences;
- 74% of Australians prefer to buy Australian made products “as often as possible”;
- 95% of Australians are “more likely” to buy Australian made products, followed by New Zealanders (63%), Britons (32%) and Americans (18%);
- 49% of Britons were “more likely” to buy Australian wine than local wine;
- 26% of New Zealanders were “more likely” to buy Australian made clothes.

INTERNATIONAL CONSUMER RESEARCH, USA — HORIZON CONSUMER SCIENCE 2006

- This is the second part of a three-year study tracking the effectiveness of the AMAG promotional campaign in Los Angeles;
- The level of awareness of the campaign rose from 11% in 2005 to 16% in 2006;
- Almost 40% of respondents believed Australian products were made with craftsmanship;
- 29% of respondents felt that Australian products were of good value;
- Almost 20% of respondents described Australian products as unique.

INTERNATIONAL CONSUMER RESEARCH, BANGKOK — BROOKER CORP 2006

- 7% of the respondents associate the AMAG logo with high quality products;
- 45% of the respondents trust the tag-line “Australian Made, Global Quality”, because they believe that Australian products are of high quality and they believe Australia is a trustworthy country;
- 48% of importers and distributors have heard of, or seen, the Australian Made logo top-of-mind. However, after being shown the logo, 38% of respondents mentioned that they have seen the logo before;
- 75% of respondents stated that the logo would positively influence their choice to purchase, if choosing between two similar products.
- 19% of respondents were aware of the campaign running in Bangkok.

INTERNATIONAL CONSUMER RESEARCH — ROY MORGAN 2005

- People from Australia, Indonesia, New Zealand, UK, USA and Thailand were interviewed about their buying preferences;
- Of the six countries surveyed, Australia ranks third in terms of citizens’ commitment to buying local product;
- Respondents were asked if they would be more or less likely to buy products made in various countries (in total, 18 countries were listed, their own country of residence amongst them). The vast majority of respondents said they would be more likely to buy locally made goods. This sentiment was strongest in Australia and Thailand, where 96% of people said they would be more likely to buy products made locally;
- In Australia, Australian made goods are ranked first of the 18 countries listed. In New Zealand they are ranked second, and in America, Australian-made goods are ranked third (equal with Japan). They are also ranked third in the UK. Australian-made goods, in Indonesia and Thailand are ranked 7th and 10th.
- Respondents in all countries surveyed were asked about six key types of product that might carry a “Made in Australia” label: Clothes, Electrical Goods, Motor Vehicles, Sporting Goods, Food and Wine. In Australia, 95% of people say they are more likely to buy Australian made food and 68% say they are more likely to buy Australian made electrical goods,

INTERNATIONAL CONSUMER RESEARCH, USA — HORIZON CONSUMER SCIENCE 2005

- This is the first part of a three year study to investigate the awareness and perceptions of the AMAG logo;
- Overall, 11% of the respondents have either been exposed to the AMAG logo through purchase or through advertising or promotions about the country’s products;
- “Pure and natural” and “unique” are the two strongest attributes of Australian products in the eyes of the consumers;
- Some 44% believe the AMAG logo means that the product is made in Australia;
- 36% believe the logo communicates something positive such as efficiency or uniqueness;
- 38% of respondents claim the “Australian made, global quality” tagline captures positive feelings about Australia;
- About 50% believe the slogan communicates that the products are of good quality, meet global standards, or that they can be confident in what they buy.

INTERNATIONAL CONSUMER RESEARCH, BANGKOK — BROOKER CORP 2005

- 13% of respondents recognized the logo when shown;
- Respondents believed the logo indicates where the product is sourced and acts as a quality indicator - most respondents perceive Australian products to be of high quality, and none of the respondents perceive Australian products as being low quality;
- 79% stated the logo would positively influence their choice to purchase;
- The most frequently mentioned top-of-mind products from Australia are clothing & textiles, followed by beauty and cosmetic products and edible products;
- Respondents perceive Australian made products as high quality (64%), high prestige (62%), trustworthy (61%) and high value for money (60%);
- 60% trust the tag-line “Australian Made, Global Quality”;
- 48% of importers and distributors recognized the logo when shown;
- 70% said the logo would positively influence their choice to purchase;
- 78% said the logo would have a positive impact on the allocation of shelf space in outlets;
- Most respondents said the major target market of Australian made products would be people between 25-44 years old with a monthly income of around 25,000-40,000 Baht who live in Bangkok;
- 72% respondents trust the tag-line “Australian Made, Global Quality”.

AUSTRALIAN CONSUMER RESEARCH — ROY MORGAN RESEARCH 2002

- 90% of Australians are actively seeking Australian products and consciousness is high amongst all age groups;
- Many people are confused by manufacturers’ claims—they often find it difficult or very difficult to identify which products are Australian;
- People look to the words ‘Made in Australia’ or the Australian Made logo as the main signifiers of Australian products;
- Overall people are confident that the goods that carry the Australian Made logo are really made in Australia;
- 96% of the respondents recognise the Australian Made logo.